



2015

# GEORGIAN TOURISM IN FIGURES

STRUCTURE &  
INDUSTRY DATA



## Summary

This yearbook provides statistical information on the Georgian tourism sector and the activities of the Georgian National Tourism Administration (GNTA) in 2015. It covers statistical data, trends, the activities undertaken by the GNTA to promote tourism and the standing of Georgia on international tourism indices.

In 2010, the Georgian National Tourism Administration was established as a Legal Entity of Public Law under the Ministry of Economy and Sustainable Development. The administration plays an essential role in the economic development of the tourism industry in Georgia. Its goals are to ensure the development of sustainable tourism through positioning Georgia as a unique travel destination on the international tourist map, to improve visitors' experience and maximize their expenditure to significantly contribute to the national economy, and to effectively cooperate with strategic partners.

From a statistical viewpoint, the performance of the tourism industry in Georgia in 2015 can be characterized as a period of further growth. In 2015 a record number of 5,901,094 international arrivals was reached, which approached the 6 million margin. Georgia attracted an additional 385,535 international travelers, which lead to improved economic indicators.

Domestic and international tourism is an important factor in the Georgian economy. The expenditures of foreign visitors to Georgia have a significant effect on the balance of payments. Approximately 61.4% of Georgia's service export revenue comes from tourism. Revenues from international tourism receipts displayed an increasing trend and reached 1.94 billion USD in 2015, while expenditures of domestic visitors equaled 1.53 billion GEL. Tourism made up 6.7% of total GDP. This is due in part to a 258 million GEL increase in value added from tourism-related activities.

In 2015, there were a total of 1,475 accommodation units registered in the GNTA database, comprising 51,404 beds. Classification of accommodations by the number of rooms showed that accommodation with

five or fewer rooms was the largest category with 519 such units (representing 35% of the total).

According to the Travel & Tourism Competitiveness Report 2015 Georgia ranks 71st among 141 nations (Score: 3.68). Compared to 2013, there have been improvements in the following areas: Air Transport and Tourist Service Infrastructure, Environmental Sustainability, Safety and Security and Health and Hygiene. Georgia has been successful in international relations as well. In 2015, agreements of cooperation in the field of tourism were signed with Turkmenistan, South Korea and Belarus. The new portal is now online to support international missions of Georgia. The portal includes country presentations, tourism brochures, etc.

The outlook for the tourism industry is highly optimistic. It is forecast that the sector will create more jobs and generate more income in the years to come. The number of arrivals to Georgia is expected to keep increasing thanks to various steps taken by both the government, in general, and the Georgian National Tourism Administration, in particular. The recently created Georgian Tourism Strategy 2025 presents a ten-year plan which should play a key role in accomplishing this aim successfully.

In 2015, the Georgian National Tourism Administration participated in 26 international and domestic tourism fairs, conducted marketing campaigns on nine target markets and hosted 64 press and fam trips.

Among the actions taken by the GNTA to increase the number of travelers are: development of tourism infrastructure, facilitation of international travel, improvement of service, increasing awareness of Georgia, implementation of marketing activities on domestic and international markets and development of tourist products.

We firmly believe that this publication will become an important source of data and information that you will frequently come back to.

# International Arrivals

International arrivals in Georgia have been growing rapidly over recent years. In 2015 they reached a record number of 5,901,094, representing annual growth of 7%. The highest growth rate to date was registered in 2012, when the number of international arrivals increased by 56.9%.

The border crossing registration procedure allows identification of different types of arrivals. Out of the total number of visits, 38.7% lasted longer than 24 hours, 37.6% were same day visits and 23.7% were for the purpose of transit.

The most popular season among international travelers is summer. During this season, the number of international arrivals equaled 2,087,138 (June: 496,794; July: 737,898; August: 852,446), which accounted for 35.4% of all international arrivals.

The majority of all arrivals, 87.8% (5,180,010), were from neighboring countries. Only 12.2% arrived from other countries.

Armenia was the leader in terms of the number of visits - 1,468,888 (an increase of 10.8%), as well as in terms of the growth of international arrivals (+143,253). The highest growth in the number of Armenian visitors was registered in August (+43,663) and June (+27,857). There was also a significant growth of Russian (+114,523), Azerbaijani (+110,043) and Israeli (+17,102) travelers. This growth was primarily the result of new direct flights, press trips and marketing campaigns administered by the Georgian National Tourism Administration.

In 2015, 242,172 EU citizens (4.1% more than the previous year) arrived in Georgia, which is 4.1% of total arrivals.

The largest share of visitors, 5,034,368 (85.3%), arrived in Georgia by land transport, followed 764,588 (13%) by air transport. Arrivals by rail and sea were 62,664 (1.1%) and 39,474 (0.6%), respectively. The busiest border was Sarpi (Turkish border), which saw 1,406,998 border crossings in 2015, amounting to 23.8% of all border crossings. This was followed by Sadakhlo (Armenian border) at 18.4% and Tsiteli Khidi (Azerbaijani border) at 17.1%.

## Basic Information

International travel statistics are provided by the Information-Analytical Department of the Ministry of Internal Affairs of Georgia.

## Methodology

International travel statistics describe the dynamics of inbound travelers registered at 20 border checkpoints. It should be noted that one more border checkpoint Kartsakhi was added to the list in 2015.

## The list of border checkpoints is provided below:

**Air:** Tbilisi International Airport, Batumi International Airport and Kutaisi International Airport.

**Sea:** Poti Port, Batumi Port and Kulevi port.

**Land:** Akhkerpi, Guguti, Vale, Vakhtangisi, Ninotsminda, Sadakhlo, Sarpi, Stepantsminda (Kazbegi), Tsodna, Tsiteli Khidi, Samtatskaro, Kartsakhi.

## Main published indicators:

International arrivals by nationality, border, and border type, visits lasting more and less than 24 hours, transit visits.

24 hours and more - include visits that last more than 24 hours.

Same day visits - include visits that last less than 24 hours in which the same border is used for entry and exit.

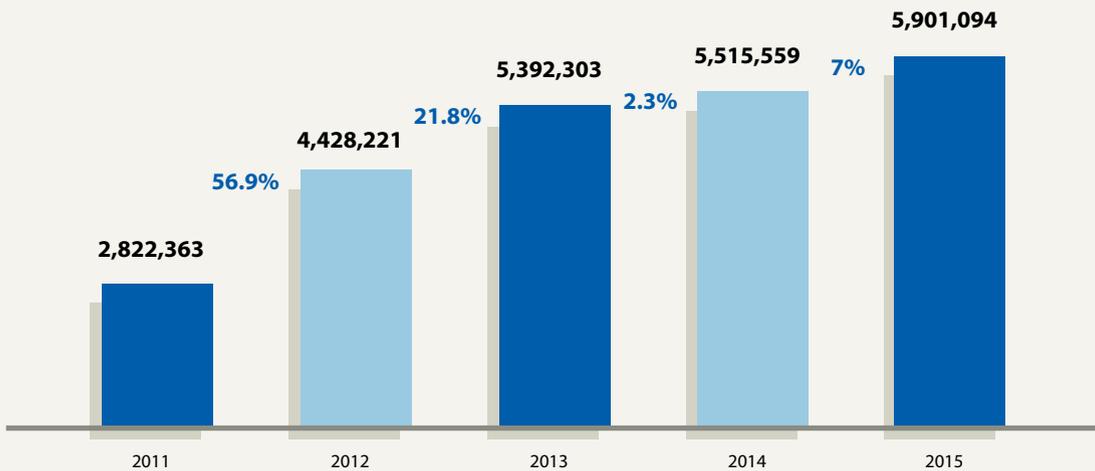
More detailed information can be found on the Georgian National Tourism Administration's website: [www.gnta.ge](http://www.gnta.ge)

## International Arrivals by Type

	2012	2013	2014	2015	% Change 2014-2015
<b>Total</b>	4,428,221	5,392,303	5,515,559	5,901,094	7%
<b>24 hours and more</b>	1,789,592	2,065,296	2,229,094	2,281,971	2.4%
<b>Same-day visits</b>	1,883,670	2,138,216	2,172,429	2,218,288	2.1%
<b>Transit</b>	754,959	1,188,791	1,114,036	1,400,835	25.7%

Source: The Ministry of Internal Affairs of Georgia

## International Arrivals by Year



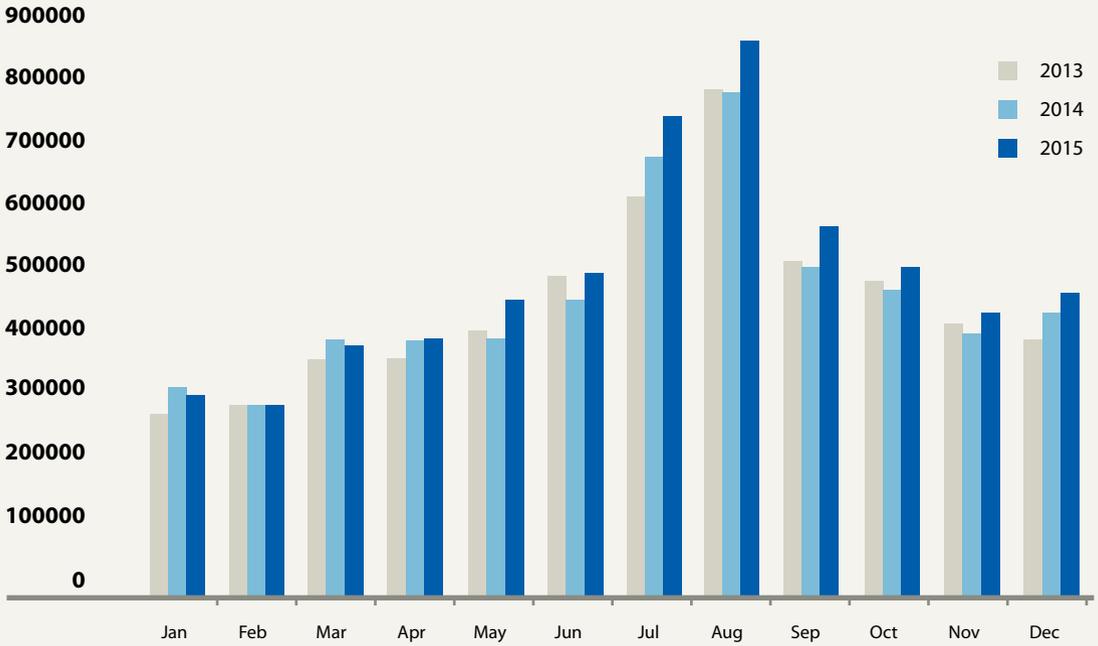
Source: The Ministry of Internal Affairs of Georgia

## International Arrivals by Region

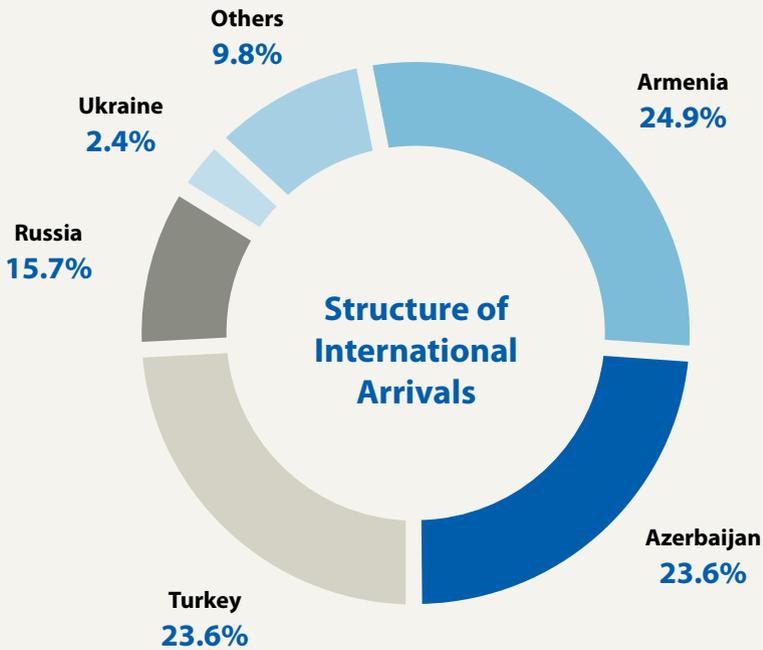
Region	2014	2015	Change	% Change
<b>Total</b>	5,515,559	5,901,094	385,535	7%
<b>Europe</b>	5,354,633	5,723,434	368,801	6.9%
<b>Americas</b>	34,631	38,698	4,067	11.7%
<b>East Asia/Pacific</b>	81,303	73,548	-7,755	-9.5%
<b>Africa</b>	4,109	4,411	302	7.3%
<b>Near/Middle East</b>	38,764	56,682	17,918	46.2%

Source: The Ministry of Internal Affairs of Georgia

## International Arrivals by Month



Source: The Ministry of Internal Affairs of Georgia



Source: The Ministry of Internal Affairs of Georgia



Source: The Ministry of Internal Affairs of Georgia

## International Arrivals: Top 10 Countries

Country	2014	2015	Change	% Change
Armenia	1,325,635	1,468,888	143,253	10.8%
Azerbaijan	1,283,214	1,393,257	110,043	8.6%
Turkey	1,442,695	1,391,721	-50,974	-3.5%
Russia	811,621	926,144	114,523	14.1%
Ukraine	143,521	141,734	-1,787	-1.2%
Israel	42,385	59,487	17,102	40.3%
Poland	46,314	41,425	-4,889	-10.6%
Germany	33,446	36,826	3,380	10.1%
Kazakhstan	28,394	36,777	8,383	29.5%
USA	28,272	31,147	2,875	10.2%

Source: The Ministry of Internal Affairs of Georgia

## Average Length of Stay of International Visitors

Year	2013	2014	2015
Number of Days (24 hours)	4.8	5.6	5.1

Source: The Ministry of Internal Affairs of Georgia

## Average Length of Stay Top 5 Countries

Country	Average Length of Stay (Days)
Ukraine	12.1
Russia	9.9
Azerbaijan	3
Armenia	2.6
Turkey	2.2

Source: The Ministry of Internal Affairs of Georgia

## International Tourist Arrivals Top 10 Countries

Country	2014	2015	Change	% Change
Russia	503,331	535,553	32,222	6.4%
Azerbaijan	424,116	428,870	4,754	1.1%
Turkey	395,200	373,296	-21,904	-5.5%
Armenia	348,489	322,704	-25,785	-7.4%
Ukraine	113,206	109,445	-3,761	-3.3%
Israel	40,882	57,213	16,331	39.9%
Poland	42,519	38,304	-4,215	-9.9%
Kazakhstan	24,229	32,308	8,079	33.3%
Germany	28,255	31,556	3,301	11.7%
USA	23,800	27,581	3,781	15.9%

Source: The Ministry of Internal Affairs of Georgia

## International Arrivals by Borders

Border name	Border with	2014	2015	Change	% Change
<b>Total</b>	↓	5,515,559	5,901,094	385,535	7%
<b>Including</b>	↓	↓	↓	↓	↓
<b>Sarpi</b>	Turkey	1,469,587	1,406,998	-62,589	-4.3%
<b>Sadakhlo</b>	Armenia	968,079	1,087,763	119,684	12.4%
<b>Tsiteli Khidi</b>	Azerbaijan	957,901	1,011,601	53,700	5.6%
<b>Kazbegi</b>	Russia	699,889	908,684	208,795	29.8%
<b>Tbilisi Airport</b>	.....	493,895	627,903	134,008	27.1%
<b>Tsodna</b>	Azerbaijan	241,164	224,394	-16,770	-7.0%
<b>Ninotsminda</b>	Armenia	240,322	205,160	-35,162	-14.6%
<b>Vale</b>	Turkey	99,561	91,920	-7,641	-7.7%
<b>Batumi Airport</b>	.....	65,528	77,490	11,962	18.3%
<b>Vakhtangisi</b>	Armenia	49,271	61,124	11,853	24.1%
<b>Kutaisi Airport</b>	.....	83,665	59,195	-24,470	-29.2%
<b>Gardabani Railway</b>	Azerbaijan	36,246	34,896	-1,350	-3.7%
<b>Guguti</b>	Armenia	30,943	29,618	-1,325	-4.3%
<b>Sadakhlo Railway</b>	Armenia	35,269	27,768	-7,501	-21.3%
<b>Batumi Port</b>	.....	24,491	20,879	-3,612	-14.7%
<b>Poti Port</b>	.....	17,452	15,483	-1,969	-11.3%
<b>Kartsakhi</b>	Turkey	0	6,353	6,353	
<b>Kulevi Port</b>	.....	1,749	3,112	1,363	77.9%
<b>Akhkerpi</b>	Armenia	153	394	241	157.5%
<b>Samtatskaro</b>	Azerbaijan	394	359	-35	-8.9%

Source: The Ministry of Internal Affairs of Georgia

# Travel Behavior of the Georgian Residential Population - 2015

In 2015 the number of domestic visits amounted to 12.4 million. The majority of visits were from Tbilisi (25.7%) and Imereti (21.7%). Most visits were conducted to large cities.

## Duration and Purpose of Travel

Visitors' average trip length was two nights and varied by place of residence. Visitors from Tbilisi tend to stay for longer periods (three nights, on average), while other visitors spend two nights away from their usual environment on average.

The majority of domestic visits (54.5%) were carried out by domestic residents for the purpose of visiting friends or relatives. Shopping was the main reason for 11.4% of visitors. A significant share (10.3%) was for health and medical care. As for leisure and recreation, only 7.6% of visits were made for this purpose. Other frequently observed purposes were: visits to a second home (6.6%) and business and professional purposes (6.0%).

## Travel Destinations

About 24.1% of total domestic trips were made to the capital, followed by 8.4% to Kutaisi and 7.1% to Batumi. Among other destinations were: Rustavi (2.5%), Gori (2.2%), Telavi (2.0%), Mtskheta (1.7%) and Akhaltsikhe (1.7%).

Among the regions the most popular places were Imereti, Ajara and Kakheti with 21.1%, 10.8% and 8.5% of total domestic visits respectively.

## Accommodation

During this period, the total number of overnight stays was 26.9 million, including the 65.4% of domestic travelers who stayed in the private homes of friends and relatives. This is partially a consequence of the dominant influence of the visiting friends and relatives segment. A considerably large number of domestic visitors 22.3% stayed in their own homes, while 4.3% stayed in a rented apartment.

## Expenditure

Total expenditure by domestic visitors during the estimation period was 1.53 billion GEL; average expenditure per visit was 124 GEL. The largest share of visitors' expenditures, 28.6%, was registered on served food and drinks.

24%

Tbilisi - Most Popular Destination



8%  
Kutaisi



7%  
Batumi

## Basic information

The National Statistics Office of Georgia conducted this research to determine the structure of domestic visits within Georgia.

## Methodology

The results of this report are based on in-person, face-to-face interviews with respondents living in households throughout the territory of Georgia. The survey was designed to collect information from a representative sample of the resident population aged 15 and above who had a travel experience within the country in the last month.

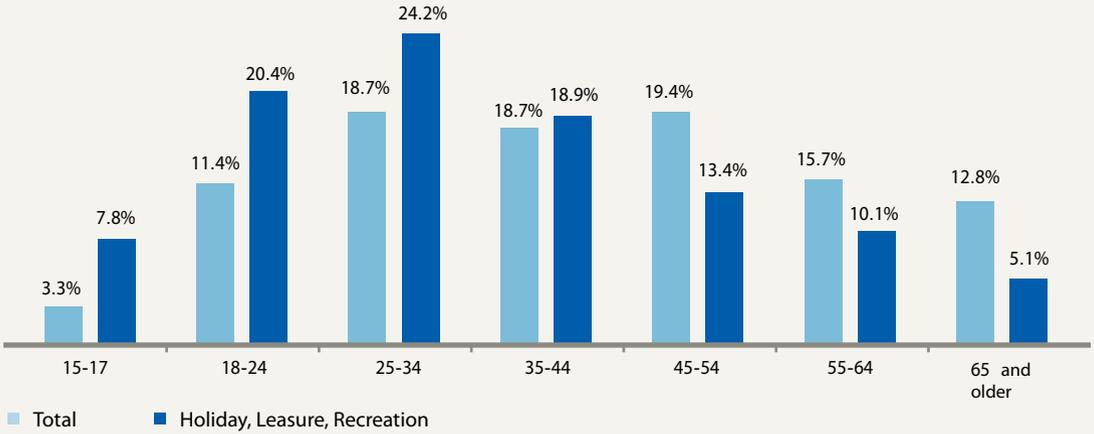
In line with UNWTO Recommendations on Tourism Statistics, domestic tourism refers to trips of residents within Georgia to a location outside of their usual environment.

In the context of tourism statistics, two simultaneous methods are used for the classification of a domestic visit: location and frequency. The location method takes into consideration the municipal structure of the country. For defining the usual environment it is crucial whether the domestic traveler made a visit out of his/her municipality. The second criteria defines the specific frequency of visits that are considered regular. If a Georgian domestic traveler visits another municipality less than once every two weeks, this is not considered as regular and is therefore classified as a domestic visit.

Main published indicators include: place of permanent residence, purpose of visit and frequency, length of stay, places visited, accommodation, source of information, means of transport, satisfaction level and expenditure.

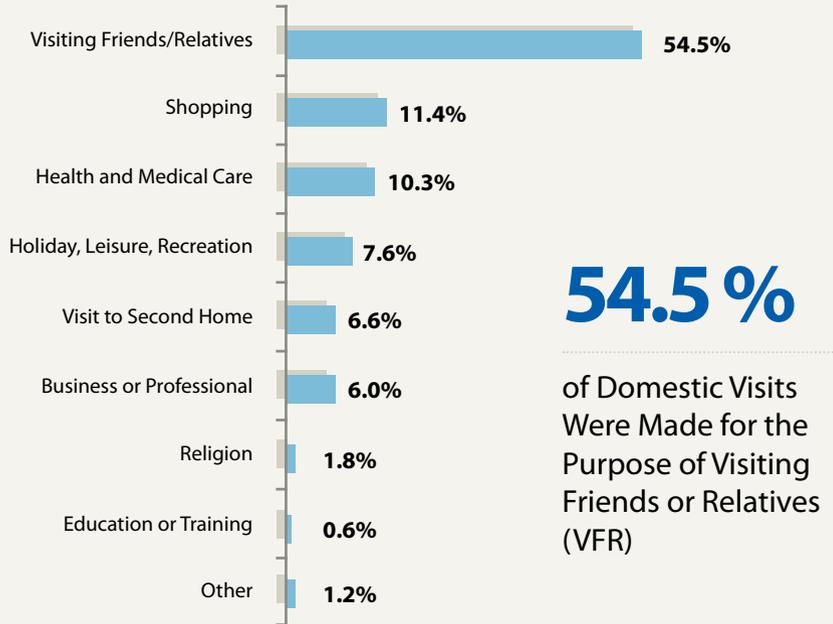
More detailed information can be found at [www.gnta.ge](http://www.gnta.ge) and [www.geostat.ge](http://www.geostat.ge)

## Age Groups



Source: National Statistics Office of Georgia

## Main Purpose of Visit



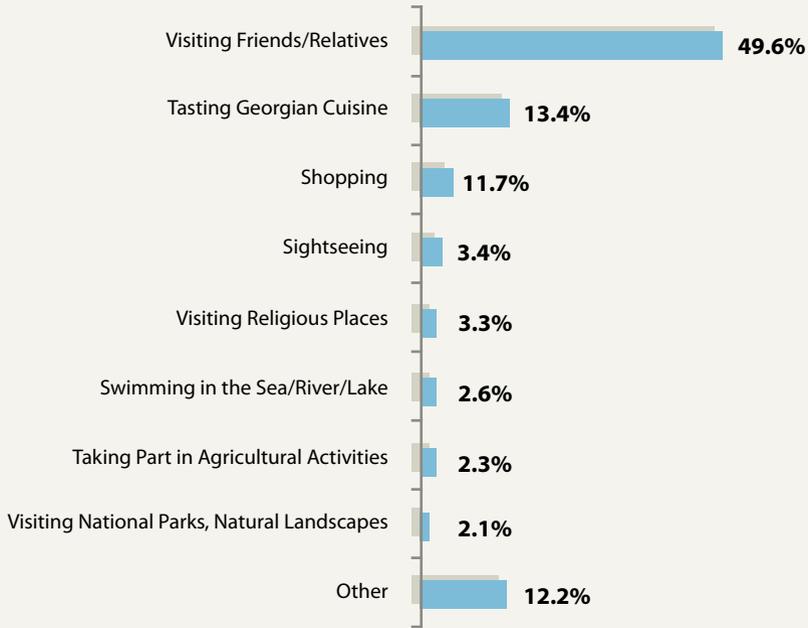
**54.5%**

of Domestic Visits  
Were Made for the  
Purpose of Visiting  
Friends or Relatives  
(VFR)



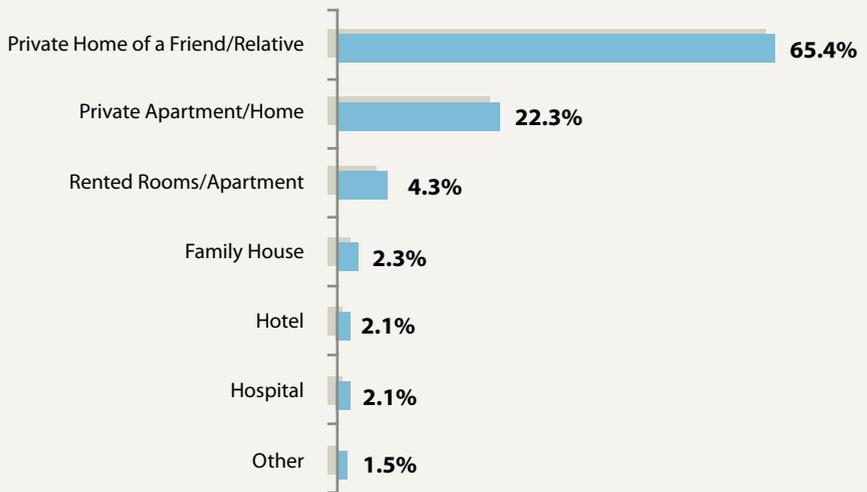
Source: National Statistics Office of Georgia

## Popular Tourism Activities (II-IV Quarters, 2015)



Source: National Statistics Office of Georgia

## Accommodation



Source: National Statistics Office of Georgia

## Expenditure Structure

Components	Total Expenditure GEL (x1000)	Share of Total Expenditure
Served Food and Drinks	437,383	28.6%
Shopping	430,680	28.2%
Local Transport	274,847	18.0%
Accommodation	54,115	3.5%
Cultural and Entertainment Services	20,119	1.3%
Expenditures	312,267	20.4%

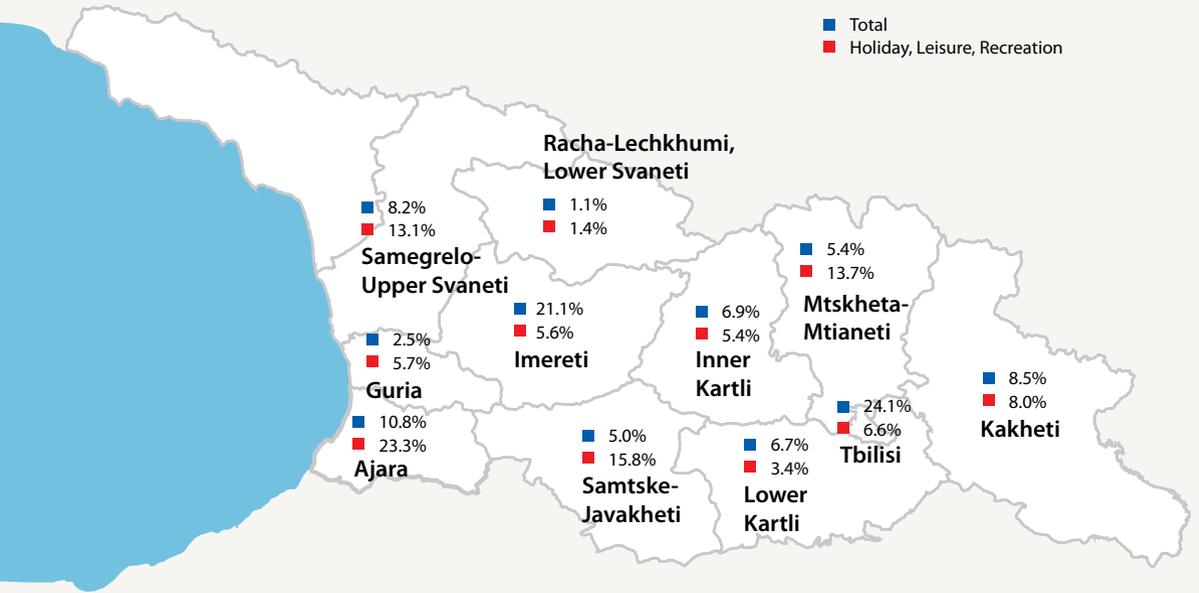
Source: National Statistics Office of Georgia

## Duration of Stay According to the Place of Residence

Place of Residence	Average Overnights
Tbilisi	3
Imereti	2
Ajara	2
Guria	2
Samegrelo-Upper Svaneti	2
Kakheti	2
Lower Kartli	2
Samtskhe-Javakheti	1
Inner Kartli	1
Mtskheta-Mtianeti	1

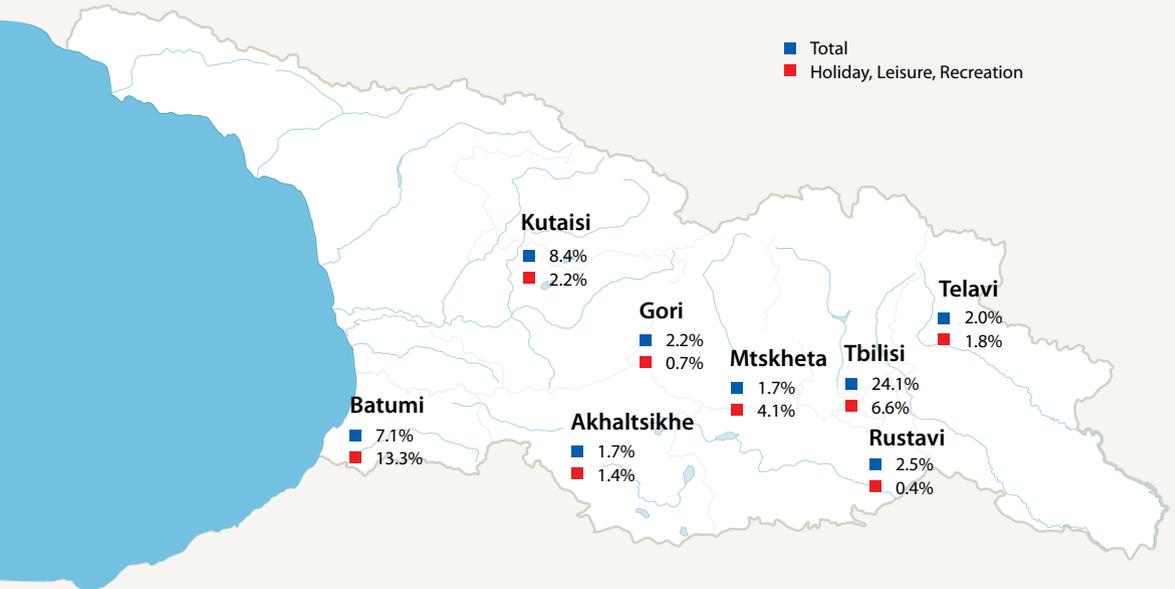
Source: National Statistics Office of Georgia

## Most Visited Regions



Source: National Statistics Office of Georgia

## Most Visited Destinations



Source: National Statistics Office of Georgia

# Tourism - an Important Sector of the Economy

Travel and Tourism is one of the largest and fastest growing service industries globally. According to the World Travel and Tourism Council (WTTC), the industry's direct contribution to world GDP in 2015 was 2.2 Trillion USD (3% of GDP) and it supported 108 million jobs. However, taking into account the combined direct and indirect impact of travel and tourism, the WTTC assesses the total economic contribution of this sector to be 9.8% of world GDP in 2015. It is responsible for 1 in 11 jobs, 4.3% of total economic investment and 6.1% of world exports (Economic Impact of Travel and Tourism 2016, Annual Update, WTTC).

## Tourism - an Invisible Export

The expenditure of foreign guests in Georgia has a huge effect on the national balance of payments. Approximately 61.4% of Georgia's service export revenues come from tourism. On the asset side, the balance of payments reports Georgia's income from foreign visitors; on the liabilities side, it shows the expenditure of Georgian residents while abroad. In 2015, the foreign exchange income from foreign tourism in Georgia amounted to 1.94 billion USD, which is 8.3% higher compared to 2014. Foreign exchange expenditures for foreign tourism in Georgia amounted to 0.33 billion USD; compared to 2014 this indicator increased by 10.2%. In 2015 the balance of foreign tourism in Georgia amounted to 1.61 billion USD, an 8% increase over 2014.

In 2015, foreign card operations of international travelers amounted to 1.46 billion GEL, an increase of 27.8%, compared to 2014.

## Employment Module in Tourism

In 2015, the total number of tourism-related

employments amounted to 158,515. The largest share of jobs was in the transport sector, which accounts 56.2% of all tourism jobs. Other significant contributors are hotels and restaurants, accounting for 15.8% of tourism work.

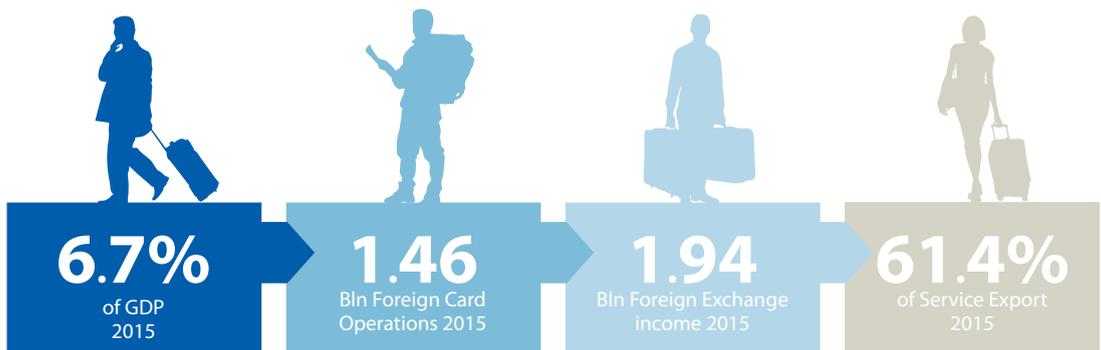
## Share of Tourism in the Economy

Between 2014 and 2015, the total value added in the tourism sector increased by 16.2% and reached 1.84 billion GEL due to increased demand. As a result, tourism's gross value added, as a proportion of GDP, increased from 6.3% to 6.7%. The additional value added in the tourism industry in 2015 was mainly driven by accommodation (an increase of 27.8%) and passenger traffic (air transport increased by 11.4% and other transport decreased by 1.5%).

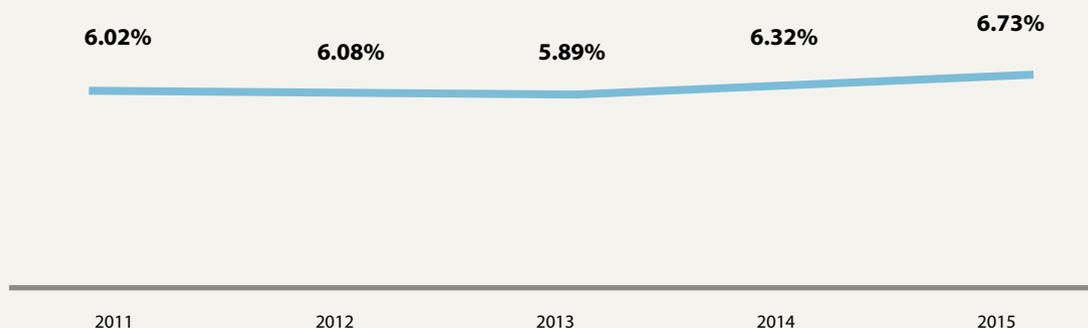
### Main published indicators:

1. Share of tourism in GDP
2. Share of tourism in total output
3. Number of tourism-related employment (Rough estimates of the total number jobs (both full-time and part-time)).
4. Foreign currency income from foreign tourism
5. Foreign currency expenses for foreign tourism
6. Balance of foreign tourism
7. Foreign card operations of international travelers

More detailed information about the contribution of tourism to the economy can be found at the National Statistics Office website [www.geostat.ge](http://www.geostat.ge) the National Bank of Georgia's website [www.nbg.ge](http://www.nbg.ge) and the Georgian National Tourism Administration's website [www.gnta.ge](http://www.gnta.ge).



## Share of Tourism in GDP



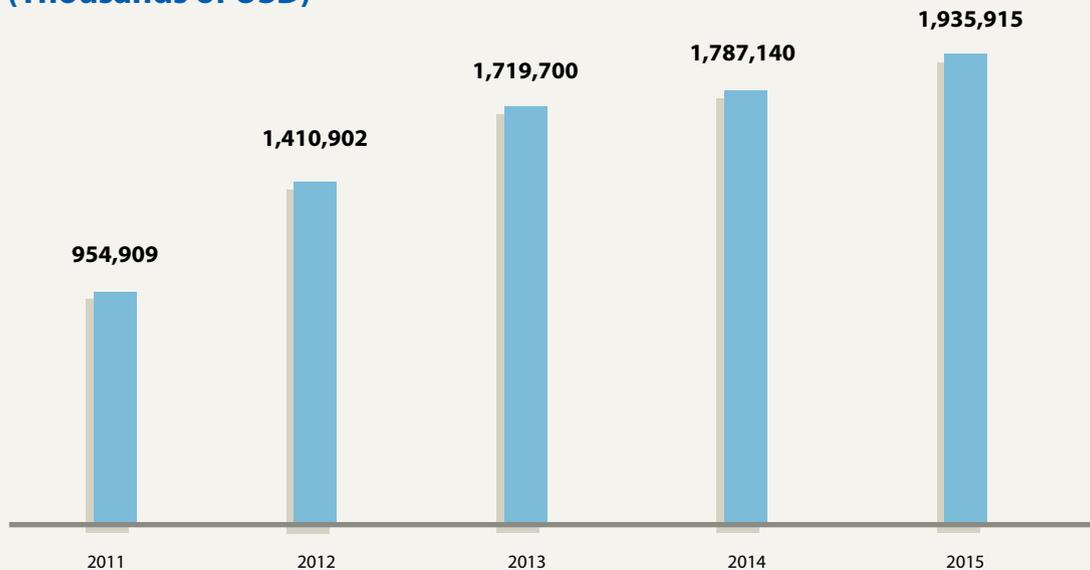
Source: National Statistics Office of Georgia

## Tourism Value Added 2012-2015 (Thousands of GEL)

	2012	2013	2014	2015	% Change 2014-2015
<b>Total</b>	1,369,000	1,374,400	1,586,659	1,844,358	16.2%
<b>Including</b>	↓	↓	↓	↓	↓
<b>Accommodation units</b>	132,400	185,000	222,471	284,380	27.8%
<b>Food Establishments</b>	378,200	341,200	373,178	409,548	9.7%
<b>Transport</b>	442,700	356,000	445,707	446,271	0.1%
<b>Travel companies</b>	415,700	492,200	545,303	704,158	29.1%

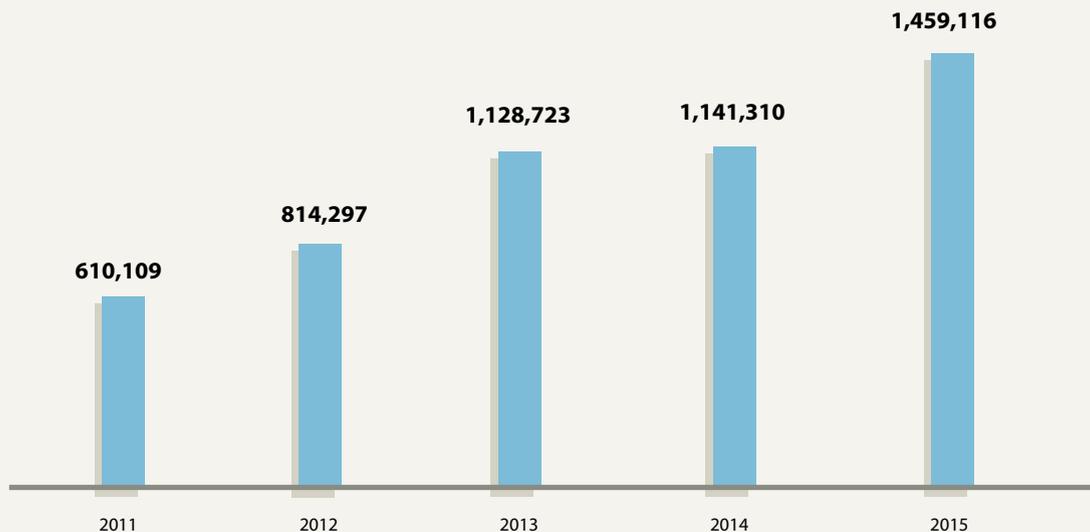
Source: National Statistics Office of Georgia

## International Tourism Receipts (Thousands of USD)



Source: National Bank of Georgia

## Foreign Card Operations of International Travelers (Thousands of USD)

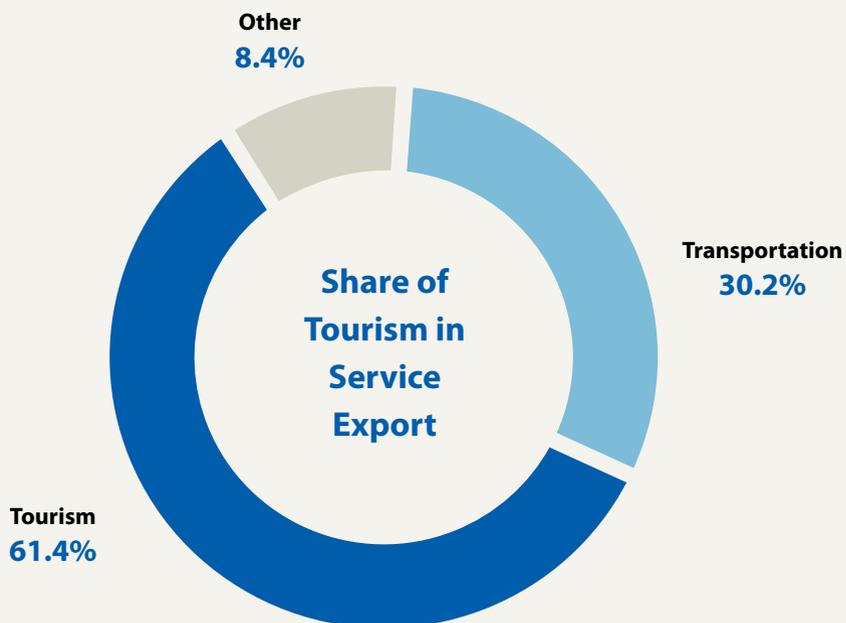


Source: National Bank of Georgia

## Foreign Currency Revenues from Incoming Tourism 2012-2015 (Thousands of USD)

	2012	2013	2014	2015	% Change 2014-2015
<b>Total</b>	1,410,902	1,719,700	1,787,140	1,935,915	8.3%
<b>Including</b>	↓	↓	↓	↓	↓
<b>I. Q</b>	235,930	302,818	315,461	306,365	-2.9%
<b>II. Q</b>	330,827	426,525	429,690	460,056	7.1%
<b>III. Q</b>	487,721	604,202	649,775	741,807	14.2%
<b>IV. Q</b>	356,423	386,156	392,215	427,688	9.0%

Source: National Bank of Georgia



Source: National Bank of Georgia

## The Aviation Market

The aviation market in Georgia has demonstrated considerable growth in recent years. Three international and one domestic airport currently operate in Georgia, all of which fully comply with International Civil Aviation Organization standards. Georgia's aviation market is primarily international, with the majority of flights being served by Tbilisi International Airport.

Tbilisi and Batumi International Airports are run by Turkish TAV Airports Holding Company. They started operations in February and May 2007, respectively. Mestia's Queen Tamar Airport officially opened in 2011, while the construction of Kutaisi's King David the Builder International Airport was completed in September 2012. The opening of Kutaisi Airport was marked by the launch of flights by Wizz Air. Wizz Air is one of the low-cost carriers (LCC) on the Georgian market, along with Pegasus, Flydubai and Air Arabia. The capacity of Tbilisi and Batumi International Airports is 2,000 and 300 passengers/hour, respectively. The capacity of Kutaisi International Airport is 600 passengers/hour. Mestia Airport's capacity is 50-70 passengers/hour.

### Airlines

According to the Georgian Civil Aviation Agency (GCAA), Turkish Airlines is the dominant air company operating in Georgia and carries the largest number of passengers. In 2015, it served 434,904 (19.8%) passengers. Georgian Airways is the second most popular airline with 253,386 (11.6%) passengers. This is followed by Ukraine International Airlines with 212,106 (9.7%), Pegasus with 145,652 (6.6%), Wizz Air with 100,464 (4.6%), Siberia Airlines with 93,501 (4.3%), Flydubai with 90,683 (4.1%) and Belavia with 81,173 (3.7%).

Several new international airline companies were introduced to the Georgian market in 2015. The Greek company Ellinair started regular Tbilisi - Thessaloniki - Tbilisi roundtrip flights twice a week; the Iraqi airline company Fly Baghdad started Tbilisi - Baghdad - Tbilisi roundtrip flights once a week. During the summer season, charter flights were conducted by the Kazakh airline Bek Air and the Polish airline Enter Air. They flew from Aktau to Kutaisi and from Katovitsa to Batumi, respectively.

In total, 32 international and one domestic airline operated in Georgia in 2015. The major airlines operating are: Turkish airlines, Georgian Airways, Ukraine International Airlines, Pegasus, Wizz Air, Siberia Airlines, Flydubai, Belavia, Atlasjet

International, Aeroflot, Luftansa, Qatar Airways, Azerbaijan Airlines, Air Astana, Air Arabia, Air Cairo, Israir, Polish Airlines (LOT) and Transaero.

The year 2016 is going to be quite challenging for Georgia's aviation industry. New airlines are entering the market, while others are expressing interest and there is an increased frequency of flights on various routes.

In 2016 Qeshm Air is planning to enter the Georgian market, and will offer direct flights to and from Tehran twice a week. In addition, Israeli company EL AL Israel Airlines will start flights from Tbilisi and Batumi to Tel Aviv.

### Following airports included:

Tbilisi International Airport, Kutaisi David the Builder International Airport, Batumi International Airport, and Mestia Queen Tamar Airport.



**+4.5%**

**13,667**  
Flights



**+12.6%**

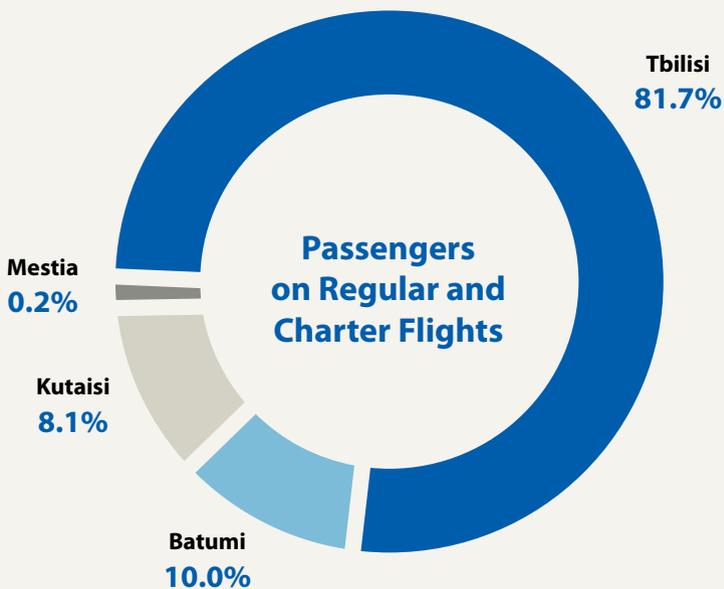
**2,261,011**  
Passengers

**Domestic Airlines**  
**11.7%**



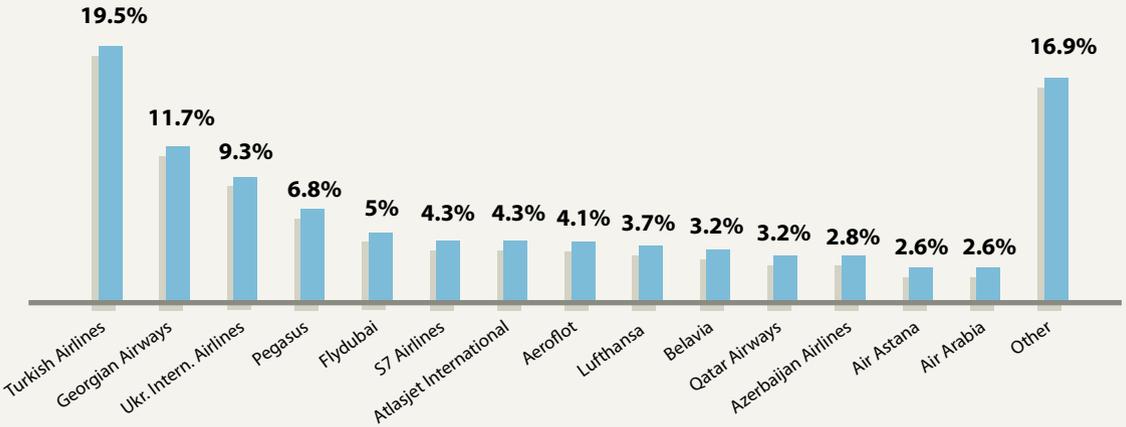
**International Airlines**  
**88.3%**

Source: Georgian Civil Aviation Agency



Source: Georgian Civil Aviation Agency

# Tbilisi International Airport: Share of Airlines



Source: Georgian Civil Aviation Agency

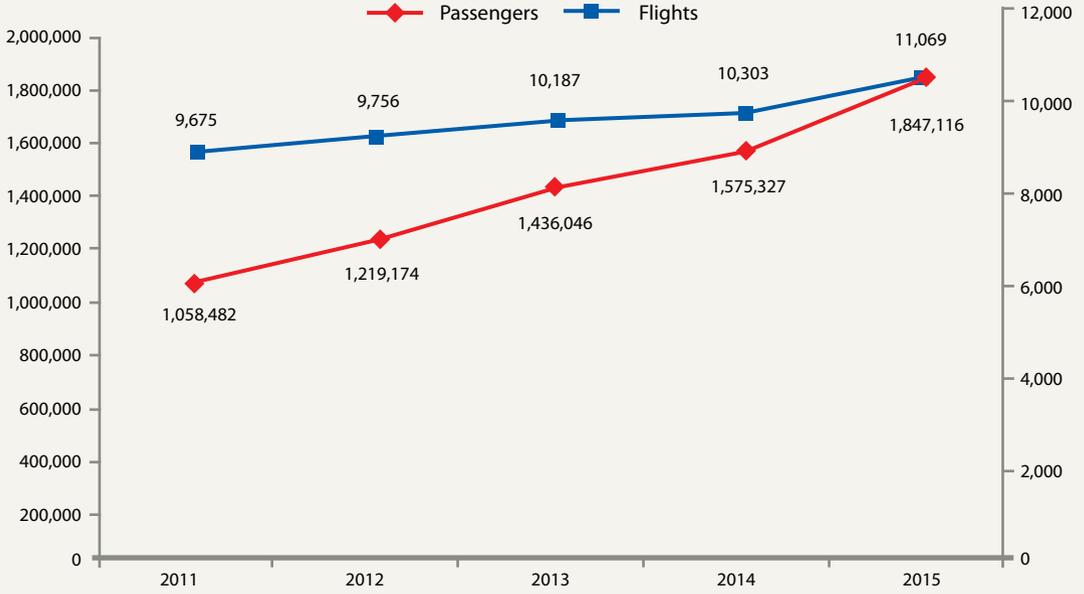
# Tbilisi International Airport: Passengers and Flights 2014-2015

## (Passengers in thousands)



Source: Georgian Civil Aviation Agency

## Tbilisi International Airport: Passengers and Flights



Source: Georgian Civil Aviation Agency

## Kutaisi International Airport: Passengers and Flights



Source: Georgian Civil Aviation Agency

## Batumi International Airport: Passengers and Flights



Source: Georgian Civil Aviation Agency

## New Routes of Airline Companies from Georgia in 2015

Airline	Route	Frequency
<b>Georgian Airways</b>	Tbilisi - Samara - Tbilisi	Once a Week
	Tbilisi - Rostov - Tbilisi Tbilisi - Petersburg - Tbilisi	Twice a Week
	Tbilisi - Erevan - Tbilisi	Seven Times a Week
<b>Ural Airlines</b>	Tbilisi - Petersburg - Tbilisi	Once a Week
<b>Air Astana</b>	Tbilisi - Astana - Tbilisi	Twice a Week
<b>Ellinair</b>	Tbilisi - Thessaloniki - Tbilisi	Twice a Week
<b>Pegasus</b>	Kutaisi - Istanbul - Kutaisi	Three Times a Week
<b>Air Cairo</b>	Tbilisi - Hurghada - Tbilisi	Four Times a Week

Source: Georgian Civil Aviation Agency

## Accommodation Market

The number of accommodation units registered in the database of the Georgian National Tourism Administration is 1,475, with a total of 51,404 beds.

Tbilisi has the largest numbers of beds - 13,218 (25.7%), followed by the Ajara region with 11,293 beds (22%).

Tbilisi boasts several international hotel brands: Radisson, Marriott, Sheraton, Holiday Inn, Citadine, Cron Palace, Best Western. In 2015, Mercure and Hotels and Preference Hualing were added to this list. Regarding Batumi, Hilton joined the list of existing hotel brands - Sheraton, Radisson Blu and Divan.

A number of brand hotels have also started operating in the spa resorts of Georgia. It should be noted that Rixos Hotel and Crowne Plaza opened in Borjomi in 2015.



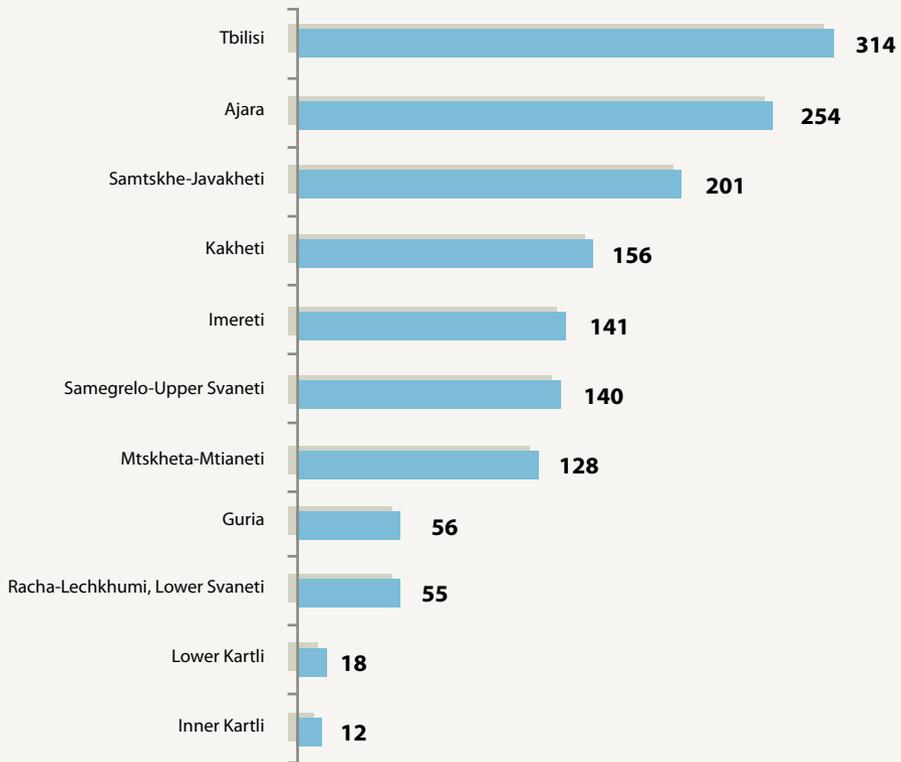
There are currently several planned and ongoing hotel constructions in Georgia. The construction of the following brand hotels are planned in Tbilisi: Hilton Garden Inn, Radisson Park Inn, Millenium Hotel, Rixos, Hyatt Regency, Moxy Marriott and Intercontinental. In the regions, the construction of Crowne Plaza (Batumi), Babylon Tower (Batumi), Best Western (Kutaisi) and Radisson Blu Resort (Tsinandali) are planned.

The majority of hotels being constructed are located in Tbilisi, Ajara, Samtskhe-Javakheti, Imereti and Kakheti Regions.

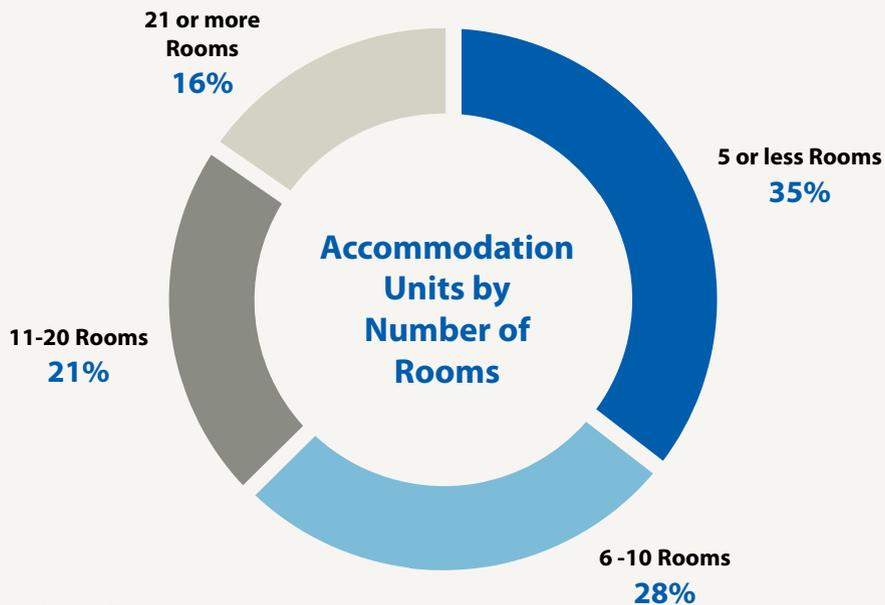
**In this report, by “brand hotels” the following hotels are meant:** Best Western Tbilisi; Citadines Apart’hotel; Courtyard Marriott Hotel; Cron Palace Hotel; Crowne Plaza Borjomi; Divan Suites Batumi; Hilton Hotels & Resorts, Holiday Inn Tbilisi; Hotels and Preference Hualing Tbilisi; Mercure Tbilisi Old Town; Radisson Blu Hotel, Batumi; Radisson Blu Iveria Hotel, Tbilisi; Rixos Hotel, Borjomi; Rooms Hotel Kazbegi; Rooms Hotel Tbilisi; Sheraton Batumi Hotel; Sheraton Metechi Palace, Tbilisi; Tbilisi Marriott Hotel.



## Number of Accommodation Units

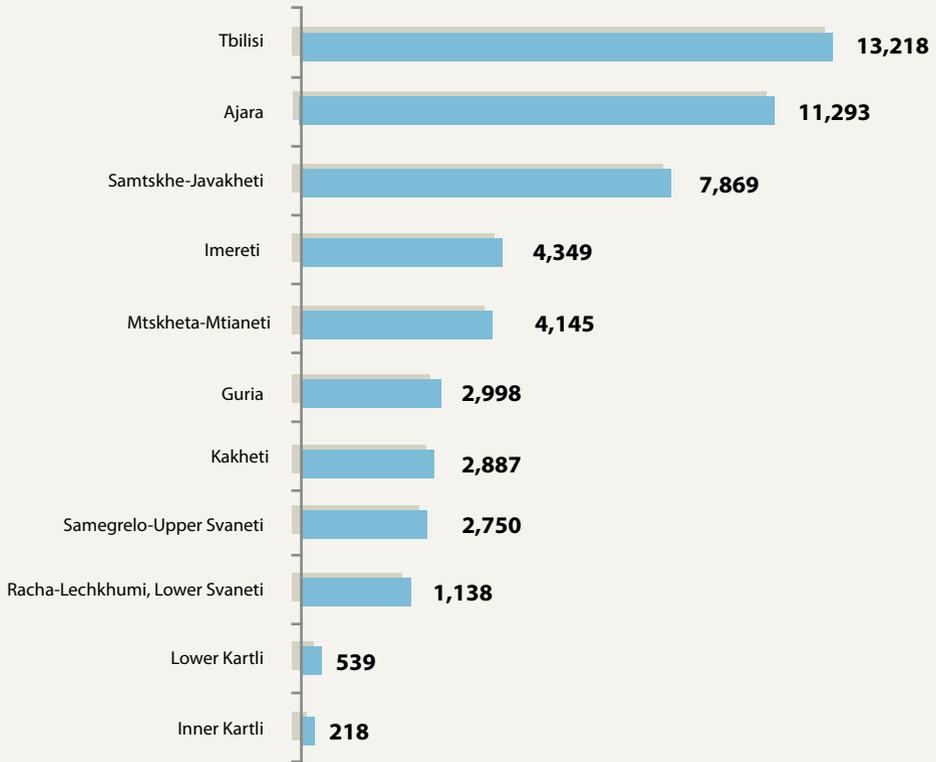


Source: Georgian National Tourism Administration

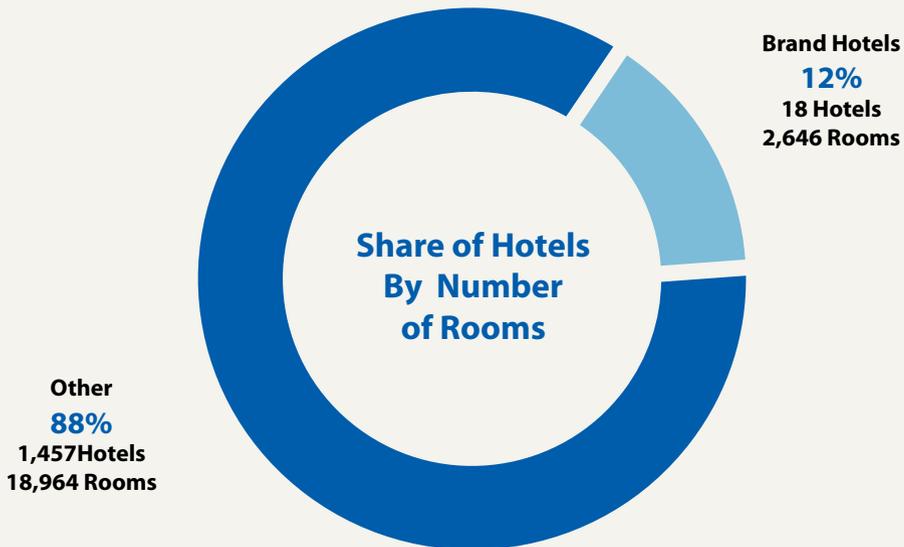


Source: Georgian National Tourism Administration

## Bed Capacity By Region

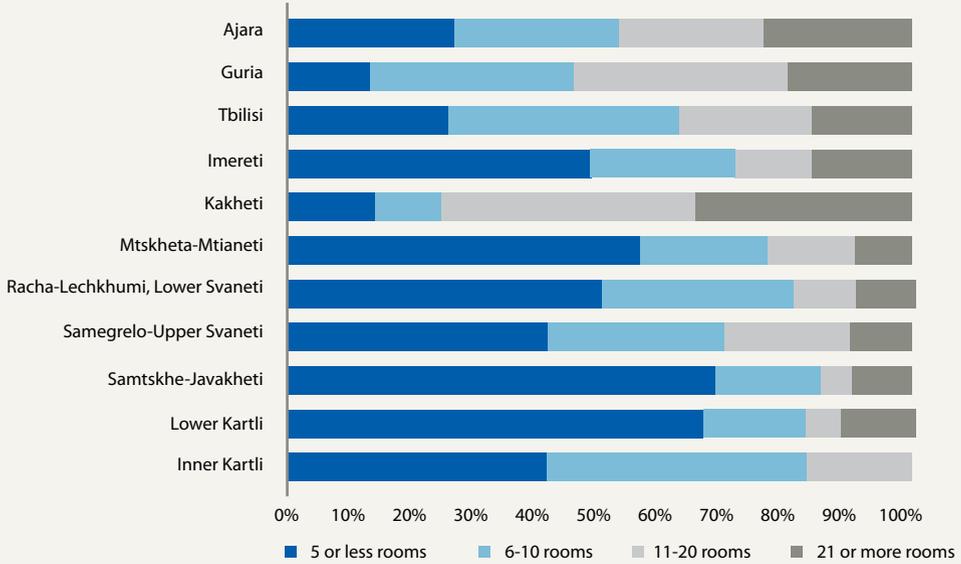


Source: Georgian National Tourism Administration



Source: Georgian National Tourism Administration

## Accommodation Units by Type and Region



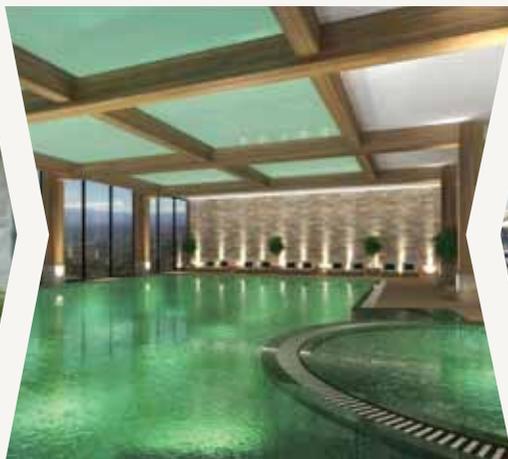
Source: Georgian National Tourism Administration

## Distribution of Brand Hotels

City	Quantity	Number of Rooms	Number of Beds
<b>Tbilisi</b>	11	1,556	2,944
<b>Batumi</b>	4	682	1,360
<b>Borjomi</b>	2	252	672
<b>Stephantsminda (Kazbegi)</b>	1	156	312

Source: Georgian National Tourism Administration

# HOTELS OPENED IN 2015:



TERRACE HOTEL / TBILISI  
 CITRUS HOTEL / TBILISI  
 VINOTEL HOTEL / TBILISI  
 COSTE HOTEL / TBILISI  
 IVERIA INN / TBILISI  
 HOTELS & PREFERENCE / TBILISI  
 GRAND PALACE HOTEL / TBILISI  
 GM HOTEL / TBILISI  
 MERCURE / TBILISI  
 SANAPIRO HOTEL / TBILISI  
 TBILISI INN / TBILISI  
 ROYAL VENEZIA HOTEL / BATUMI  
 LEOGRAND HOTEL & CASINO / BATUMI

HOTEL COLOSSEUM MARINA / BATUMI  
 HILTON / BATUMI  
 OASIS HOTEL / CHAKVI  
 MONOPOLI HOTEL / KUTAISI  
 VARDZIA RESORT HOTEL / VARDZIA  
 RIXOS / BORJOMI  
 CROWNE PLAZA / BORJOMI



**3200+**

Beds

## CONSTRUCTION OF PLANNED ACCOMODATION UNITS (2016-2017)

HILTON GARDEN INN / TBILISI  
 PARK INN BY RADISSON / TBILISI  
 MILLENIUM HOTEL / TBILISI  
 RIXOS / TBILISI  
 HYATT REGENCY / TBILISI  
 MOXY MARRIOTT / TBILISI  
 INTERCONTINENTAL / TBILISI  
 CROWNE PLAZA / BATUMI  
 BABYLON TOWER / BATUMI



**8500+**

Beds

## Sector Outlook

Despite many obstacles, the Georgian Tourism sector continued to grow in 2015. The outlook for the sector remains highly optimistic, and it is forecast that more jobs will be created and more income will be generated in the years to come. The number of arrivals to Georgia is expected to increase substantially thanks to various steps being taken by both the government in general and the Georgian National Tourism Administration in particular. In this regard, it should be noted that one of the main goals of the recently created Georgian Tourism Strategy 2025 is to get more economic benefits from tourism.

The actions taken by GNTA to increase the number of travelers to the country are: developing tourism infrastructure, improving the quality of service, increasing awareness about Georgia, implementing marketing activities on domestic and international markets and developing tourist products.



The development of tourist infrastructure stands high among the priorities of the government. In 2015, directional signs for tourist locations were mounted in 15 towns and cities in Georgia. In 17 towns and cities, two-sided lighted signs were installed, which illustrate the town map and a list of recommended sights. Furthermore, projects to plan and mark hiking trails have been worked out for Samtskhe-Javakheti, Mtskheta-Mtianeti, Samegrelo - Upper Svaneti, Racha-Lechkhumi and Lower Svaneti regions. In addition, cycling parks were constructed in Gudauri and Bakuriani ski resorts. The preparation of a new project to help adapt Mtskheta's historical monuments to persons with disabilities is particularly noteworthy. Its construction works are planned for next year.

Another significant issue is the enhancement of service quality. This is being achieved through intensive training of representatives of the tourism and hospitality industry throughout Georgia. Training courses were provided for 1,100 representatives



of the tourism industry in 15 cities. In addition, for people interested in starting a business in the tourism sector, the guidebook "Planning Inbound Tourism Business" was introduced. Additionally, catalogs for Orthodox pilgrims and Jewish tourists have been prepared in several languages.

For the purpose of stimulating domestic tourism, 12 press tours, 15 cultural and sporting events and four cleaning actions were organized. Within the framework of the project "Get to Know Georgia", nine press tours were carried out in eight regions.

Choosing the right markets is unquestionably an integral part of marketing. Alongside maintaining existing markets, the GNTA also concentrates on tapping into new countries, including the Persian Gulf countries and China, which carry huge potential. In 2015, the Georgian National Tourism Administration participated in 26 international and domestic tourism fairs, conducted marketing campaigns on nine target markets, and hosted 64 press and fam trips (396 journalists and 155 tour operators). In addition, two marketing videos were prepared for advertising purposes. Promotional videos were broadcast on CNN and Euronews.



Making the most of Georgia's rich natural and cultural resources by offering new tourist products provides increased possibilities for targeting travelers with different tastes. The GNTA's efforts focus on the development of different types of tourism, such as MICE, wine, eco, agro, adventure and others. Next year the introduction of the Convention Bureau is planned, which will contribute to better representation of business tourism and development in this direction.

According to the Travel & Tourism Competitiveness Report 2015, Georgia ranks 71st among 141 nations (Score: 3.68). Compared to 2013, improvements in the following areas have been achieved: Tourism Service Infrastructure, Air Transport Infrastructure, Environmental Sustainability, Safety and Security and Health and Hygiene.

Georgia has been successful in international relations as well. In 2015, agreements of cooperation in the field of tourism were signed with Turkmenistan, South Korea, and Belarus. The new portal is now online to support international missions of Georgia. The portal includes country presentations, tourism brochures, and more.

In 2015 Georgia hosted several high-profile events, including: the European Youth Olympic Festival, the UEFA Super Cup, EBRD Annual Meeting, the Tbilisi Silk Road Forum and the Annual Meeting of the Board of Governors of the Black Sea Trade and Development Bank (BSTDB).

### **Sixteenth meeting of the Committee on Statistics and the Tourism Satellite Account**

On January 25-27, 2016, Georgia will host two important meetings: The fifth meeting of the Technical Advisory Board and the sixteenth meeting of the Tourism Satellite Accounts Committee of the

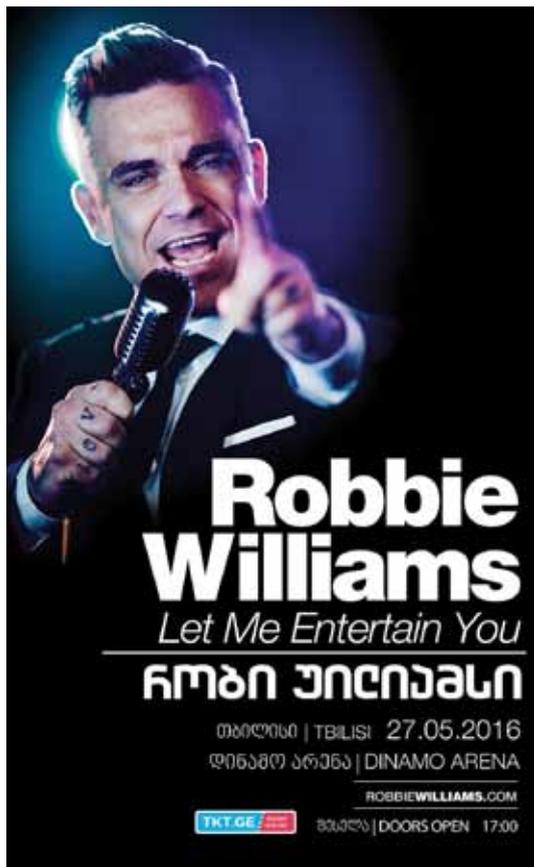


World Tourism Organisation (UNWTO), which will be held for the first time outside of Spain. A number of world tourism experts, including the UNWTO's Executive Director for Operational Programs and Institutional Relations Marcio Favilla Lucca de Paula, will be visiting Georgia to take part in the two-day meetings. Experts will discuss methodological issues of Tourism statistics and the progress of Georgia in shifting towards international methodologies.



### **1st UNWTO Global Conference on Wine Tourism**

The World Tourism Organization (UNWTO) in collaboration with the Georgian National Tourism Administration will present the 1st UNWTO Global Conference on Wine Tourism to be held in Kakheti, the wine region of Georgia, on September 7-9, 2016. 250 participants, including the Secretary-General of the World Tourism Organization, will join the event.



Within the framework of the event, the rich culture of Georgian wine making and its tourism potential will be demonstrated. The Conference will have a unique and dynamic format in which the sessions will take place in different wineries. Expert speakers will provide snapshot presentations to lead the debates which will ensue at each of the tables. The conclusion of the conference will be a compilation of all the information debated during each meeting.

### OSCE Parliamentary Assembly

The 25th Annual Session of the OSCE Parliamentary Assembly will bring together parliamentarians from across the Organization's 57 participating States at the ExpoGeorgia Exhibition Center in Tbilisi. Held under the theme "25 Years of Parliamentary Co-operation: Building Trust Through Dialogue," the Session will commemorate the quarter-century anniversary of the Assembly's work.

The Annual Session, the largest event on the OSCE PA calendar, attracts policy experts, diplomats, representatives of international organizations and members of the media. In total, approximately 700

parliamentarians are expected to attend.

### Project Check-in Georgia

Within the framework of the project "Check-in Georgia," world music stars will visit and perform in Georgia. Project starts in the beginning of April 2016 and consists of cultural events that will be held in Tbilisi and regions of Georgia. Among the invited stars is the famous Italian singer Eros Ramazzotti, whose concert will be held in Tbilisi on April 24. The British pop idol Robbie Williams will perform also in the capital on May 27. The famous band Maroon 5 invites everyone to their concert in Batumi on June 7; and the legendary opera singer Jose Carreras will sing his best arias in Kutaisi on June 18. In total, concerts are planned in 19 cities of Georgia and 35 festivals are being organized. Check-in Georgia will become a tradition and continue to diversify in the future.

## International Arrivals (UNWTO Classification)

	2014	2015	Change%
<b>Central and Eastern Europe</b>	3,722,359	4,115,224	11%
Armenia	1,325,635	1,468,888	11%
Azerbaijan	1,283,214	1,393,257	9%
Russia	811,621	926,144	14%
Ukraine	143,521	141,734	-1%
Poland	46,314	41,425	-11%
Kazakhstan	28,394	36,777	30%
Belarus	19,148	28,959	51%
Lithuania	10,917	12,360	13%
Bulgaria	11,027	10,639	-4%
Latvia	7,908	8,901	13%
Moldova	6,236	8,185	31%
Czech Republic	6,259	7,425	19%
Uzbekistan	3,647	7,058	94%
Hungary	2,667	4,705	76%
Romania	4,135	4,261	3%
Others	11,716	14,506	24%
<b>Northern Europe</b>	31,113	33,872	9%
United Kingdom	18,586	19,233	3%
Sweden	4,413	4,742	7%
Denmark	2,358	2,772	18%
Others	5,756	7,125	24%
<b>Southern Europe</b>	44,206	46,784	6%
Greece	21,464	19,221	-10%
Italy	10,421	11,955	15%
Spain	5,419	6,740	24%
Others	6,902	8,868	28%
<b>Western Europe</b>	71,092	75,540	6%
Germany	33,446	36,826	10%
France	14,090	14,087	0%
Netherlands	8,843	9,635	9%
Austria	6,109	5,523	-10%
Belgium	4,358	4,874	12%
Switzerland	3,962	4,383	11%

Others	284	212	-25%
<b>East/Med Europe</b>	1,485,863	1,452,014	-2%
Turkey	1,442,695	1,391,721	-4%
Israel	42,385	59,487	40%
Others	783	806	3%
<b>Caribbean</b>	685	1,216	78%
<b>Central Amer.</b>	310	189	-39%
<b>North Amer.</b>	32,037	35,099	10%
United States of America	28,272	31,147	10%
Canada	3,419	3,600	5%
Others	346	352	2%
<b>South Amer.</b>	1,599	2,194	37%
<b>North-East Asia</b>	16,455	19,026	16%
China	8,632	9,555	11%
Japan	4,216	5,545	32%
Others	3,607	3,926	9%
<b>Oceania</b>	3,375	3,259	-3%
<b>South Asia</b>	53,696	40,550	-24%
Iran	47,929	25,273	-47%
Others	5,767	15,277	165%
<b>South-East Asia</b>	7,777	10,713	38%
Philippines	5,659	8,410	49%
Others	2,118	2,303	9%
<b>Near/Middle East</b>	38,764	56,682	46%
United Arab Emirates	2,216	17,230	678%
Saudi Arabia	5,485	9,850	80%
Iraq	21,752	9,793	-55%
Oman	585	6,773	1058%
Others	8,726	13,036	49%
<b>East Africa</b>	1,857	1,212	-35%
<b>West Africa</b>	528	978	85%
<b>South Africa</b>	1,132	1,332	18%
<b>North Africa</b>	510	792	55%
<b>Central Africa</b>	82	97	18%
<b>Other Countries</b>	2,119	4,321	104%
<b>Total</b>	5,515,559	5,901,094	7%

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