

2016

# 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 2016. 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 GNTA 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 of 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' experiences, maximize their expenditures 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 2016 can be characterized as a period of further growth. In 2016, the number of international arrivals grew by 459,409, overstepping the six million mark for the first time. The six-millionth international visitor was even awarded a prize to stress the importance of that fact.

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 64.3% of Georgia's service export revenue comes from tourism. Revenues from international tourism receipts displayed an increasing trend and reached 2.17 billion USD in 2016, while expenditures of domestic visitors equaled 1.6 billion GEL. Tourism made up 7.1% of total GDP. This is due in part to a 218 million GEL increase in value added from tourism-related activities.

In 2016, there were a total of 1,765 accommodation units registered in the GNTA database, comprising 57,049 beds. Classification of accommodations by

the number of rooms showed that accommodation with five or fewer rooms was the largest category with 680 such units (representing 39% of the total).

Georgia has been successful in international relations as well. In 2016, agreements of cooperation in the field of tourism were signed with China, Belarus and Qatar.

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 GNTA, 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 2016, the GNTA participated in 21 international and domestic tourism fairs, conducted marketing campaigns on 16 target markets and hosted 99 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 come back to frequently.

## International Arrivals

International arrivals in Georgia have been growing rapidly over recent years. In 2016, they reached a record number of 6,360,503, representing annual growth of 7.8%. 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, 42.8% lasted longer than 24 hours, 36.4% were same day visits and 20.8% were for transit.

The most popular season among international travelers is summer. During this season, the number of international arrivals equaled 2,131,902 (June: 518,758; July: 764,763 August: 848,381), which accounted for 33.5% of all international arrivals.

The majority of all arrivals, 83.6% (5,315,451), were from neighboring countries. Only 16.4% (1,045,052) arrived from other countries. The share of arrivals from neighbouring countries decreased compared with the last year.

Azerbaijan was the leader in terms of the number of visits - 1,523,703 (an increase of 9.4%), as well as in terms of the growth of international arrivals (+130,446). The highest growth in the number of Azerbaijan visitors was registered in February (+33,623) and March (+21,073). There was also a significant growth of Iranian (+122,664), Russian (+112,606) and Ukrainian (+33,124) travelers. This growth was primarily the result of new direct flights, press trips and marketing campaigns administered by the Georgian National Tourism Administration.

In 2016, 264,403 EU citizens (9.2% more than the previous year) arrived in Georgia, which is 4.2% of total arrivals.

The largest share of visitors, 5,182,780 (81.5%), arrived in Georgia by land transport, followed 1,066,597 (16.8%) by air transport. Arrivals by rail and sea were 60,389 (0.9%) and 50,737 (0.8%), respectively. The busiest border was Sarpi (Turkish border), which saw 1,262,799 border crossings in 2016, amounting to 19.9% of all border crossings. This was followed by Sadakhlo (Armenian border) at 18.3% and Tsiteli Khidi (Azerbaijani border) at 18.3%.

### 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.

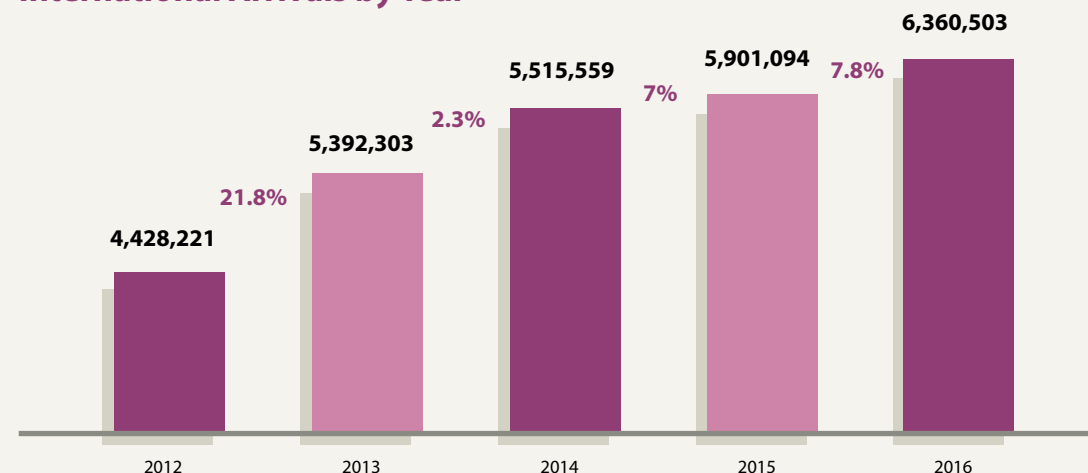
More detailed information can be found on the Georgian National Tourism Administration's website: [www.gnta.ge](http://www.gnta.ge)

## International Arrivals by Type

	2013	2014	2015	2016	% Change 2015-2016
<b>Total</b>	5,392,303	5,515,559	5,901,094	6,360,503	7.8%
<b>24 hours and more</b>	2,065,296	2,229,094	2,281,971	2,720,970	19.2%
<b>Same-day visits</b>	2,138,216	2,172,429	2,218,288	2,318,189	4.5%
<b>Transit</b>	1,188,791	1,114,036	1,400,835	1,321,344	-5.7%

Source: The Ministry of Internal Affairs of Georgia

## International Arrivals by Year



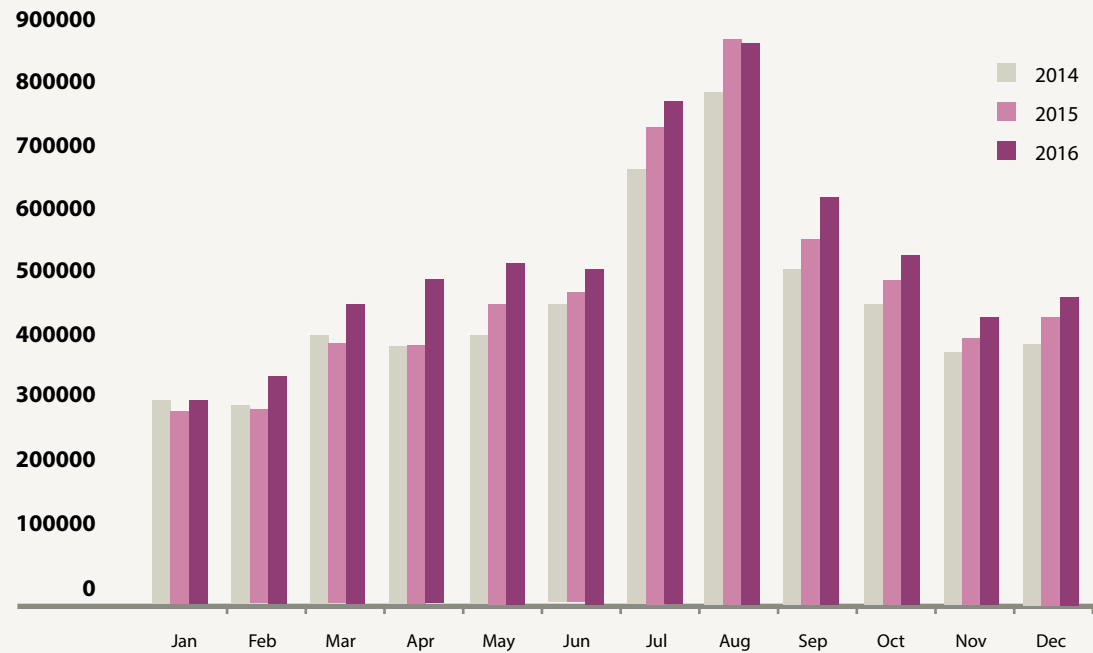
Source: The Ministry of Internal Affairs of Georgia

## International Arrivals by Region

Region	2015	2016	Change	% Change
<b>Europe</b>	5,723,434	5,976,284	252,850	4.4%
<b>Americas</b>	38,698	42,924	4,226	10.9%
<b>East Asia/Pacific</b>	73,548	239,970	166,422	226.3%
<b>Africa</b>	4,411	6,633	2,222	50.4%
<b>Middle East</b>	56,682	88,326	31,644	55.8%

Source: The Ministry of Internal Affairs of Georgia

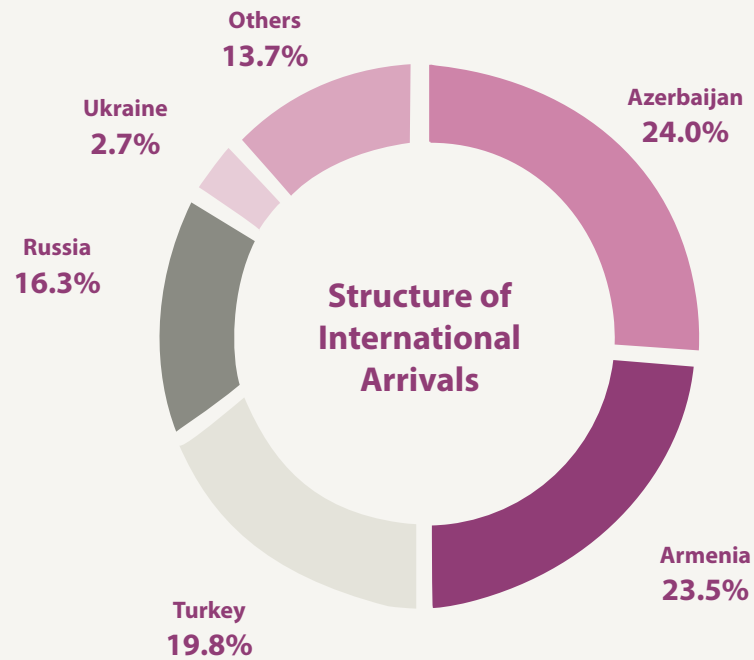
## International Arrivals by Month



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	2015	2016	Change	% Change
Azerbaijan	1,393,257	1,523,703	130,446	9.4%
Armenia	1,468,888	1,496,437	27,549	1.9%
Turkey	1,391,721	1,256,561	-135,160	-9.7%
Russia	926,144	1,038,750	112,606	12.2%
Ukraine	141,734	174,858	33,124	23.4%
Iran	25,273	147,937	122,664	485.4%
Israel	59,487	92,215	32,728	55%
Kazakhstan	36,777	48,849	12,072	32.8%
Poland	41,425	44,436	3,011	7.3%
Germany	36,826	40,915	4,089	11.1%

Source: The Ministry of Internal Affairs of Georgia

## Average Length of Stay of International Visitors

Year	2013	2014	2015	2016
Number of Days (24 hours)	4.8	5.6	5.1	6.5

Source: The Ministry of Internal Affairs of Georgia

## Average Length of Stay Top 5 Countries

Country	Average Length of Stay (Days)
Ukraine	14.62
Russia	12.79
Azerbaijan	3.25
Armenia	3.08
Turkey	2.81

Source: The Ministry of Internal Affairs of Georgia

## International Tourist Arrivals Top 10 Countries

Country	2015	2016	Change	% Change
Russia	535,212	662,087	126,875	23.7%
Azerbaijan	428,385	396,440	-31,945	-7.5%
Turkey	375,422	390,527	15,105	4%
Armenia	321,249	331,034	9,785	3%
Ukraine	110,725	144,284	33,559	30.3%
Iran	24,504	138,713	114,209	466.1%
Israel	57,208	88,961	31,753	55.5%
Kazakhstan	32,304	44,407	12,103	37.5%
Poland	38,358	42,506	4,148	10.8%
Germany	31,559	36,572	5,013	15.9%

Source: The Ministry of Internal Affairs of Georgia

## International Arrivals by Borders

Border name	Border with	2015	2016	Change	% Change
<b>Total</b>	↓	5,901,094	6,360,503	459,409	7.8%
<b>Including</b>	↓	↓	↓	↓	↓
<b>Sarpi</b>	Turkey	1,406,998	1,262,799	-144,199	-10.2%
<b>Sadakhlo</b>	Armenia	1,087,763	1,164,810	77,047	7.1%
<b>Tsiteli Khidi</b>	Azerbaijan	1,011,601	1,164,495	152,894	15.1%
<b>Kazbegi</b>	Russia	908,684	931,924	23,240	2.6%
<b>Tbilisi Airport</b>	.....	627,903	845,874	217,971	34.7%
<b>Tsodna</b>	Azerbaijan	224,394	198,558	-25,836	-11.5%
<b>Ninotsminda</b>	Armenia	205,160	193,544	-11,616	-5.7%
<b>Batumi Airport</b>	.....	77,490	129,718	52,228	67.4%
<b>Vale</b>	Turkey	91,920	108,561	16,641	18.1%
<b>Kutaisi Airport</b>	.....	59,195	91,005	31,810	53.7%
<b>Vakhtangisi</b>	Armenia	61,124	68,770	7,646	12.5%
<b>Kartsakhi</b>	Turkey	6,353	46,003	39,650	624.1%
<b>Guguti</b>	Armenia	29,618	42,494	12,876	43.5%
<b>Sadakhlo Railway</b>	Armenia	27,768	32,004	4,236	15.3%
<b>Gardabani Railway</b>	Azerbaijan	34,896	28,385	-6,511	-18.7%
<b>Poti Port</b>	.....	15,483	25,786	10,303	66.5%
<b>Batumi Port</b>	.....	20,879	22,694	1,815	8.7%
<b>Kulevi Port</b>	.....	3,112	2,257	-855	-27.5%
<b>Samtatskaro</b>	Azerbaijan	359	499	140	39%
<b>Akhkerpi</b>	Armenia	394	323	-71	-18%

Source: The Ministry of Internal Affairs of Georgia

## Travel Behavior of the Georgian Residential Population

In 2016 the number of domestic visits within Georgia amounted to 12.96 million. The majority of visits were from Tbilisi (28.3%). Most visits were 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 (four nights, on average), while other visitors spend two nights away from their usual environment on average.

The majority of domestic visits (52.5%) were carried out by domestic residents for the purpose of visiting friends or relatives. Shopping was the main reason for 12.3 % of visitors. A significant share (11.1 %) was for health and medical care. As for leisure and recreation, only 9 % of visits were made for this purpose. Other frequently observed purposes were: visits to a second home (6.8%) and business and professional purposes (4.7 %).

### Travel Destinations

About 24.4% of total domestic trips were made to the capital, followed by 7.6% to Kutaisi and 7.5% to Batumi. Among other destinations were: Rustavi (2.7%), Mtskheta (2%), Gori (1.9%), Zestafoni (1.7%), and Zugdidi (1.7%).

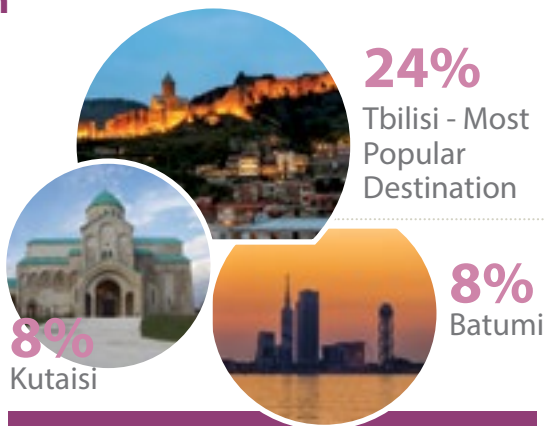
Among the regions the most popular places were Imereti, Ajara and Kakheti with 20.6%, 10.9% and 7.8% of total domestic visits, respectively.

### Accommodation

During this period, the total number of overnight stays was 28.7 million, including the 59.5% 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 25.6% stayed in their own homes, while 4.9% stayed in a rented apartment.

### Expenditure

Total expenditure by domestic visitors during the estimation period was 1.6 billion GEL; average expenditure per visit was 125 GEL. The largest share of visitors' expenditures, 28.6%, was registered on served food and drinks.



### 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.

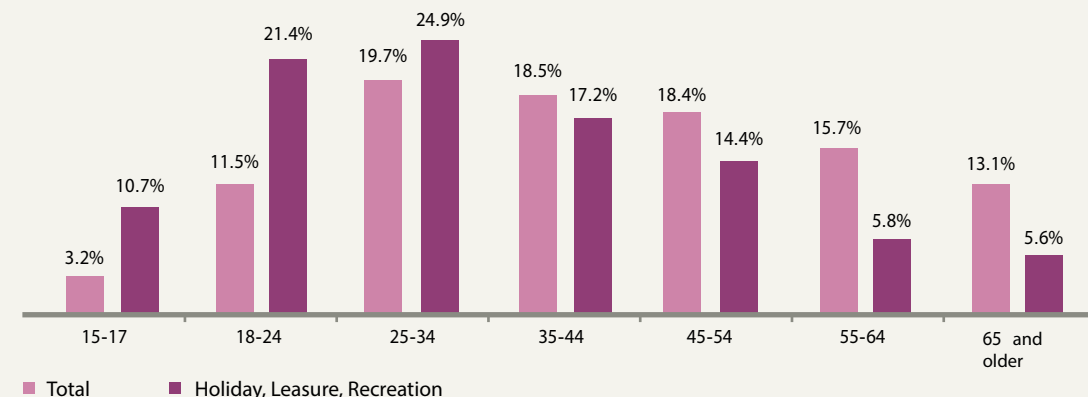
In line with UNWTO Recommendations on Tourism Statistics, domestic tourism refers to trips of residents within Georgia to a location outside of their usual environment.

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.

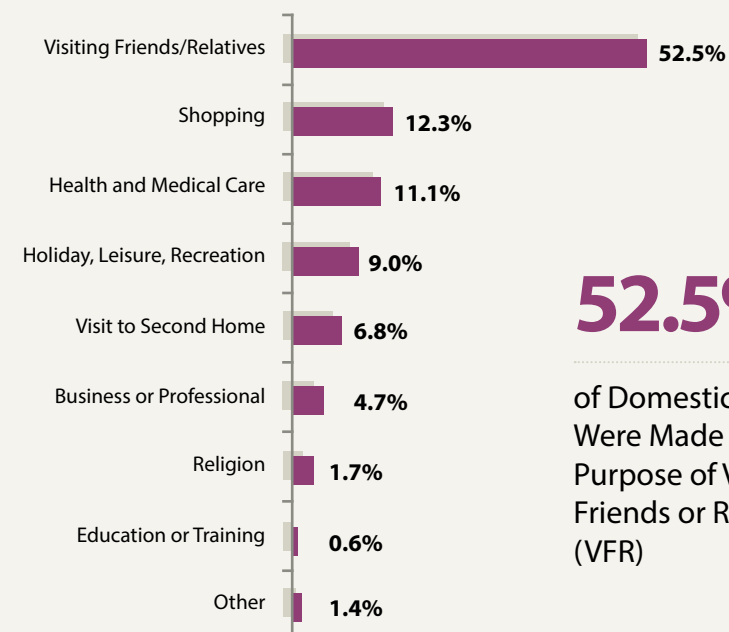
More detailed information can be found at [www.gnta.ge](http://www.gnta.ge) and [www.geostat.ge](http://www.geostat.ge)

## Age Groups



Source: National Statistics Office of Georgia

## Main Purpose of Visit



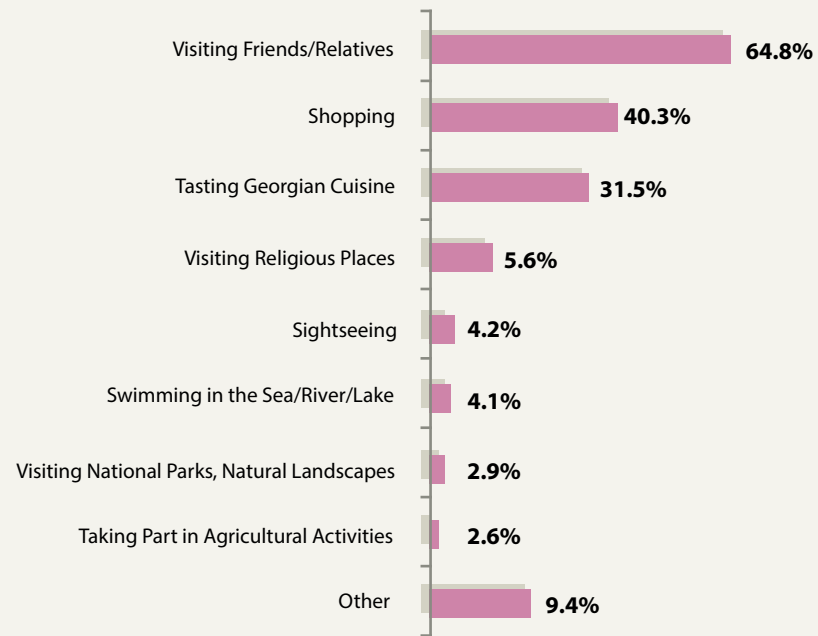
**52.5%**

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



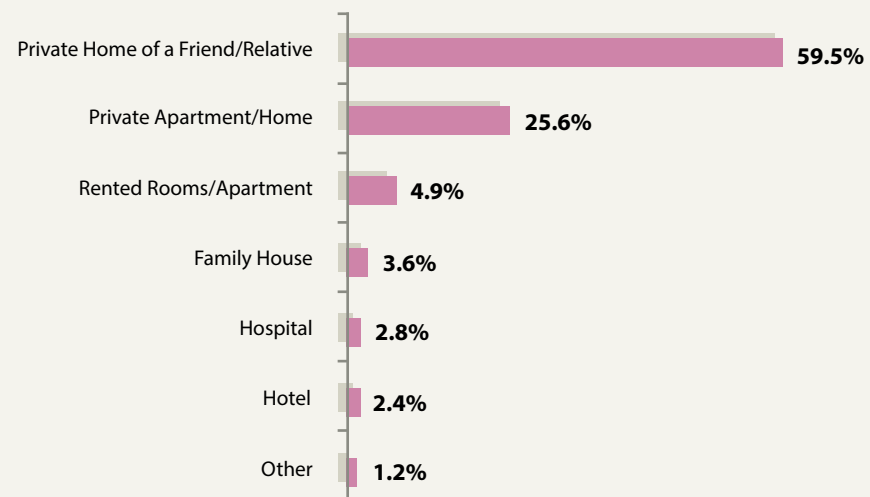
Source: National Statistics Office of Georgia

## Popular Tourism Activities



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	463,830	28.6%
Shopping	433,433	26.7%
Local Transport	273,284	16.8%
Accommodation	75,209	4.6%
Cultural and Entertainment Services	26,898	1.7%
Other Expenditures	349,449	21.5%

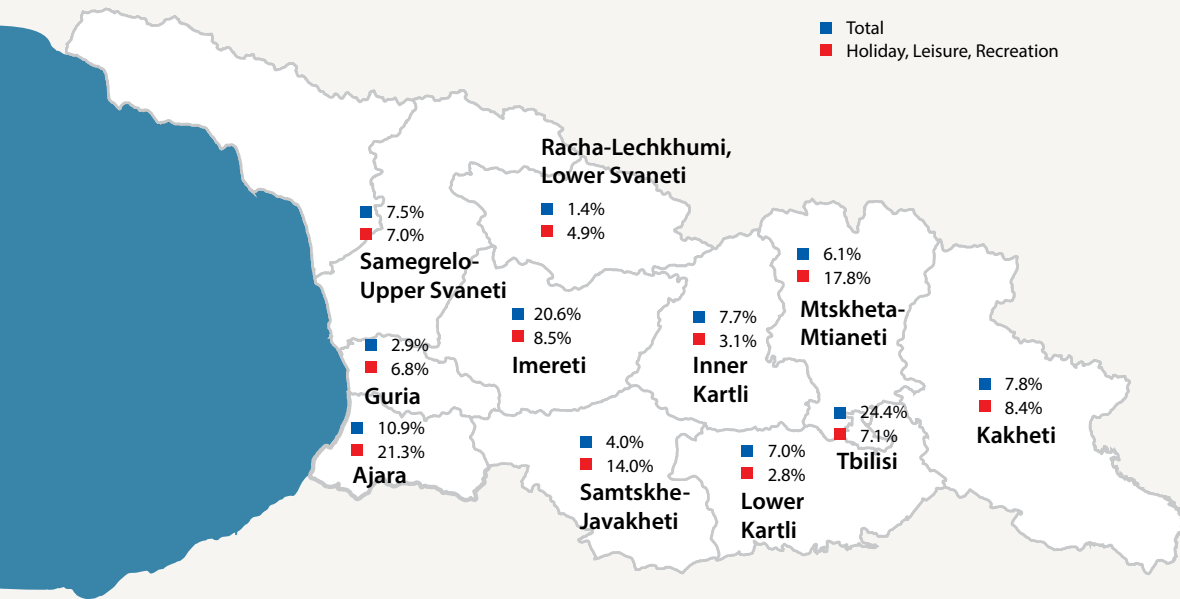
Source: National Statistics Office of Georgia

## Duration of Stay According to the Place of Residence

Place of Residence	Average Overnights
Tbilisi	4
Ajara	2
Imereti, Racha-Lechkhumi, Lower Svaneti	2
Lower kartli	2
Samegrelo-Upper Svaneti	2
Kakheti	2
Guria	1
Samtskhe-Javakheti	1
Inner Kartli	1
Mtskheta-Mtianeti	1

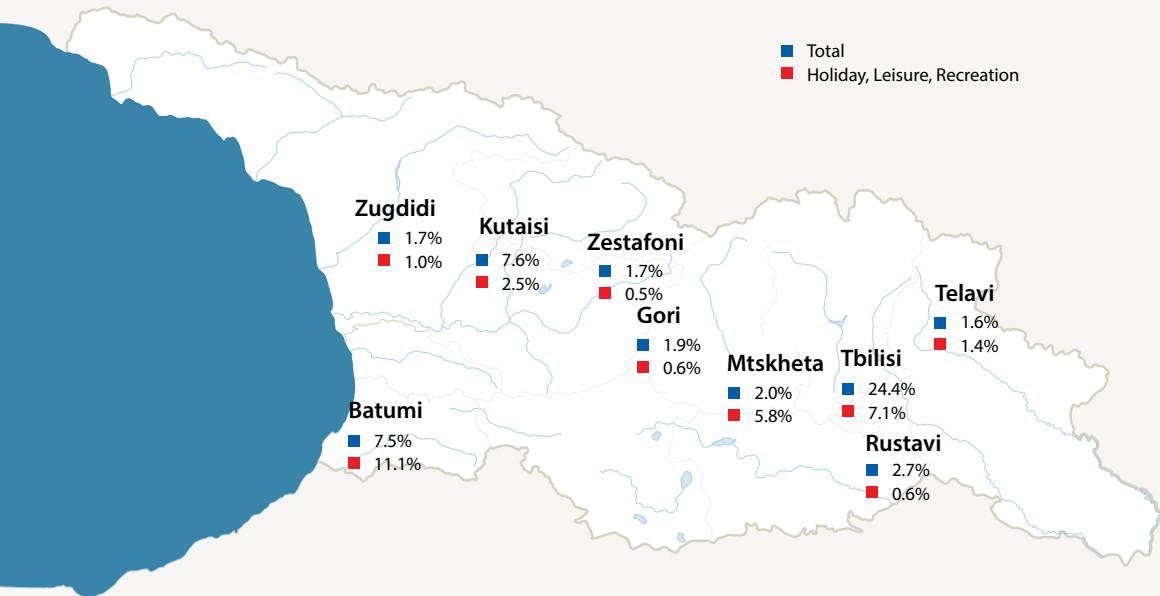
Source: National Statistics Office of Georgia

## 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 2016 was 2.3 Trillion USD (3.1% of GDP) and it supported 109 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 10.2% of world GDP in 2016. It is responsible for 1 in 11 jobs, 4.4% of total economic investment and 6.6% of world exports (Economic Impact of Travel and Tourism 2017, 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 64.3% 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 2016, the foreign exchange income from foreign tourism in Georgia amounted to 2.17 billion USD, which is 11.9% higher compared to 2015. Foreign exchange expenditures for foreign tourism in Georgia amounted to 0.39 billion USD; compared to 2015 this indicator increased by 17.2%. In 2016 the balance of foreign tourism in Georgia amounted to 1.78 billion USD, an 10.8% increase over 2015.

In 2016, foreign card operations of international travelers amounted to 1.62 billion GEL, an increase of 11.4%, compared to 2015.

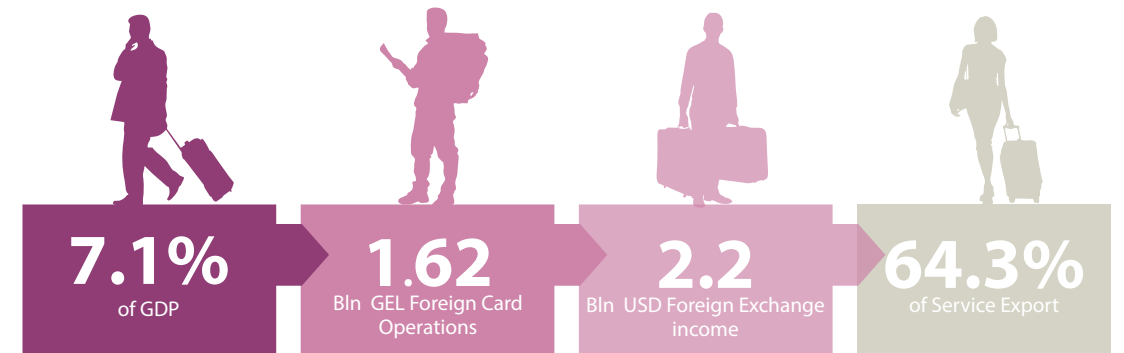
### Share of Tourism in the Economy

Between 2015 and 2016, the total value added in the tourism sector increased by 11.8% and reached 2.06 billion GEL due to increased demand. As a result, tourism's gross value added, as a proportion of GDP, increased from 6.7% to 7.1%. The additional value added in the tourism industry in 2016 was mainly driven by accommodation (an increase of 14.5%) food objects (an increase of 19.1%) and passenger traffic (air transport decreased by 0.01% and other transport increased by 26.5%).

### Main published indicators:

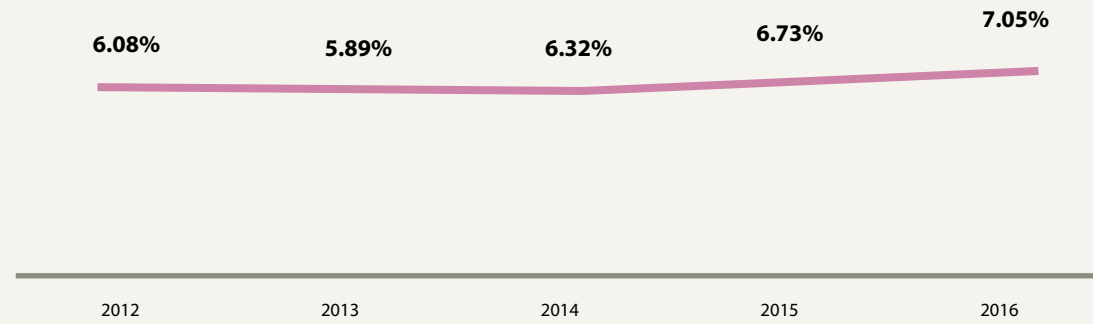
1. Share of tourism in GDP
2. Share of tourism in total output
3. Foreign currency income from foreign tourism
4. Foreign currency expenses for foreign tourism
5. Balance of foreign tourism
6. Foreign card operations of international travelers

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).



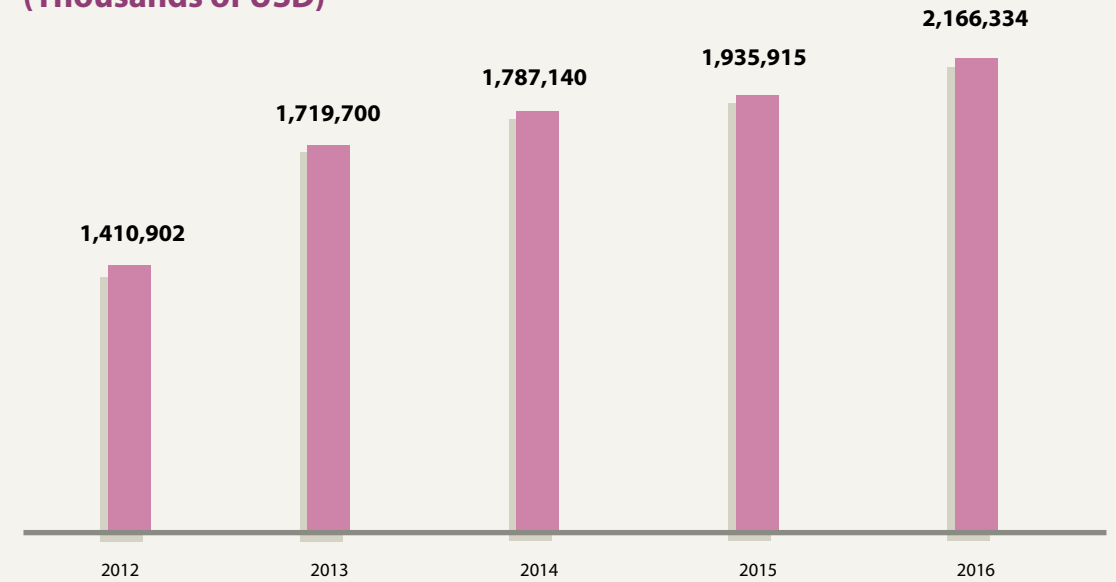


## Share of Tourism in GDP



Source: National Statistics Office of Georgia

## International Tourism Receipts (Thousands of USD)



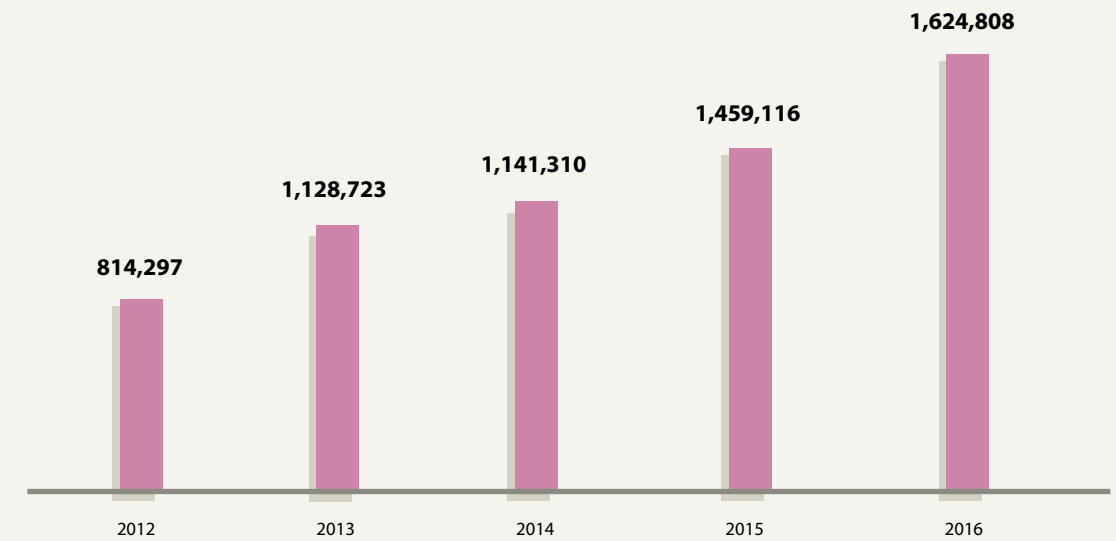
Source: National Bank of Georgia

## Tourism Value Added 2013-2016 (Thousands of GEL)

	2013	2014	2015	2016	% Change 2015-2016
<b>Total</b>	1,374,400	1,586,659	1,842,131	2,059,781	11.8%
<b>Including</b>	↓	↓	↓	↓	↓
<b>Accommodation units</b>	185,000	222,471	284,380	325,522	14.5%
<b>Food Establishments</b>	341,200	373,178	409,548	487,768	19.1%
<b>Transport</b>	356,000	445,707	444,045	544,964	22.7%
<b>Travel companies</b>	492,200	545,303	704,158	701,528	-0.4%

Source: National Statistics Office of Georgia

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

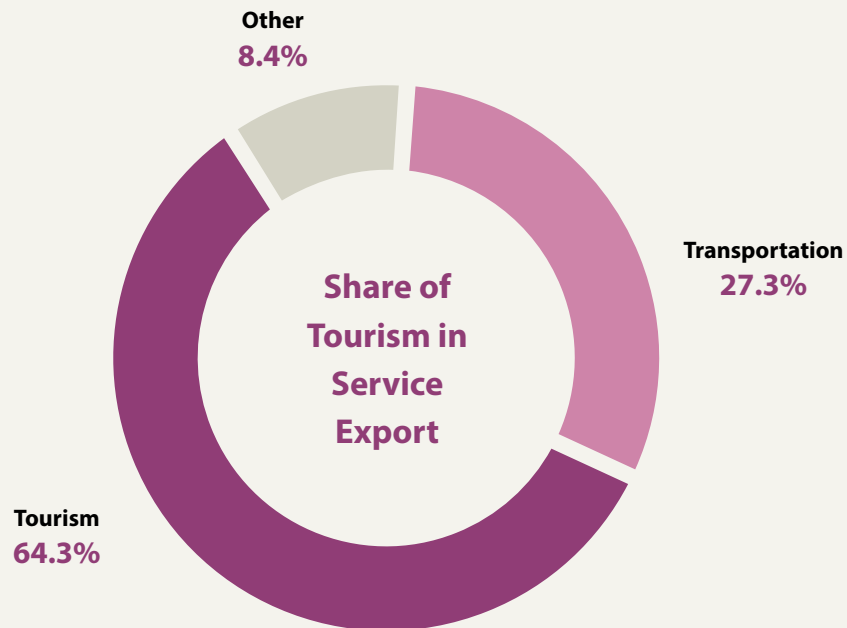


Source: National Bank of Georgia

## Foreign Currency Revenues from Incoming Tourism 2013-2016 (Thousands of USD)

	2013	2014	2015	2016	% Change 2015-2016
<b>Total</b>	1,719,700	1,787,140	1,935,915	2,166,334	11.9%
<b>Including</b>	↓	↓	↓	↓	↓
<b>I.Q</b>	302,818	315,461	306,365	352,524	15.1%
<b>II. Q</b>	426,525	429,690	460,056	515,388	12%
<b>III.Q</b>	604,202	649,775	741,807	817,192	10.2%
<b>IV. Q</b>	386,156	392,215	427,688	481,229	12.5%

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 two domestic airports 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, Pobeda Airlines and Air Arabia. In 2016, one more domestic airport was constructed in Ambrolauri. In the future, The number of airports in Georgia is expected to grow. There is an ongoing study of old inactive airports to evaluate their future exploitation prospects.

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 2016, it served 440,847 (15.9%) passengers. Ukraine International Airlines is the second most popular airline with 271,053 (9.8%) passengers. This is followed by Georgian Airways with 238,950 (8.6%), Aeroflot with 157,886 (5.7%), Siberia Airlines with 155,517 (5.6%), Flydubai with 154,903 (5.6%), Wizz Air with 154,771 (5.6%), and Pegasus with 122,751 (4.4%).

In total, 34 international and one domestic airline operated in Georgia in 2016. The major airlines operating are Turkish Airlines, Ukraine International Airlines, Georgian Airways, Aeroflot, Siberia Airlines, FlyDubai, Wizz Air, Pegasus, Air Arabia, Belavia, Lufthansa, Yanair, Atlas Global, Qatar Airways, Ural Airlines, Azerbaijan Airlines, Air Astana, Isair and etc.

Eight new international airline companies entered Georgian market in 2016, introducing roundtrip

regular flight to four destinations. The Iranian company Qeshm Air started flight from Tbilisi and Batumi to Tehran, while another Iranian company, Zagros Airlines, now flies from Tbilisi to the same destination. The Israeli company EL AL Israel Airlines started roundtrip flights from Tbilisi and Batumi to Tel Aviv. In addition, the Russian company Pobeda Airlines started flight from Tbilisi to Rostov, while the Ukrainian company Darts flies from Tbilisi to Kiev.


During the summer season, charter flights were provided by the Iranian TABAN Airlines, the Kazakh airline Sky Bus, and the Ukrainian Bravo Airlines.

The year 2017 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 of flight on various routes.

In 2017, the Bahrain company Gulf Air is planning to enter the Georgian market and will offer direct flights to and from Bahrain three times a week. In addition, the Jordan company Air Arabia Jordan will start roundtrip flights to Aman from Tbilisi. There is a significant increase of interest from Russian companies in the Georgian aviation market. Red Wings will start flights from Batumi to Moscow twice a week, while Nordavia-regional Airlines will fly from Batumi and Tbilisi to St.Petersburg once a week and twice a week, respectively. Further more, another Russian company, Nordstar, will conduct charter roundtrip flights from Batumi to Moscow three times a week.

### Following airports included:

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

  
**+12.1%**  
**15,318**  
Flights

  
**+25.6%**  
**2,840,455**  
Passengers

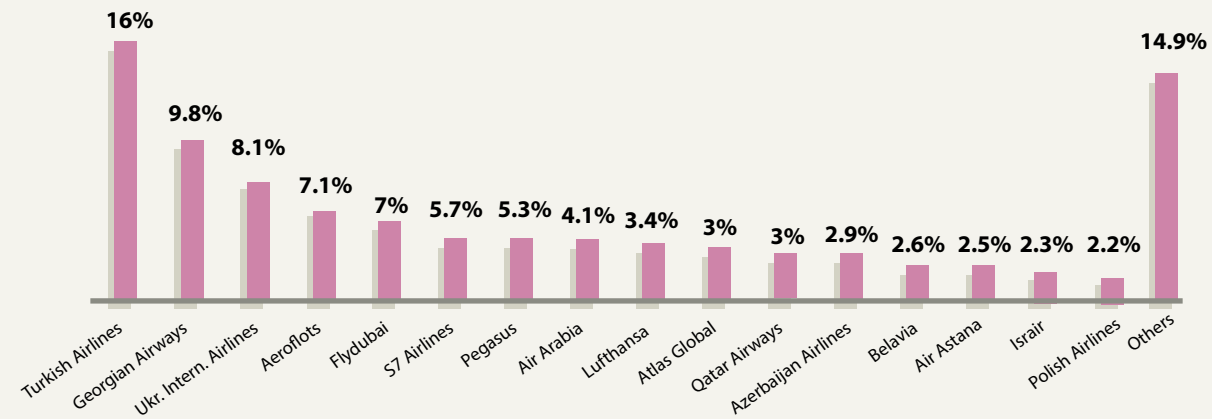
**Domestic Airlines**  
9.8%



**International Airlines**  
90.2%

Source: Georgian Civil Aviation Agency

### Tbilisi International Airport: Share of Airlines

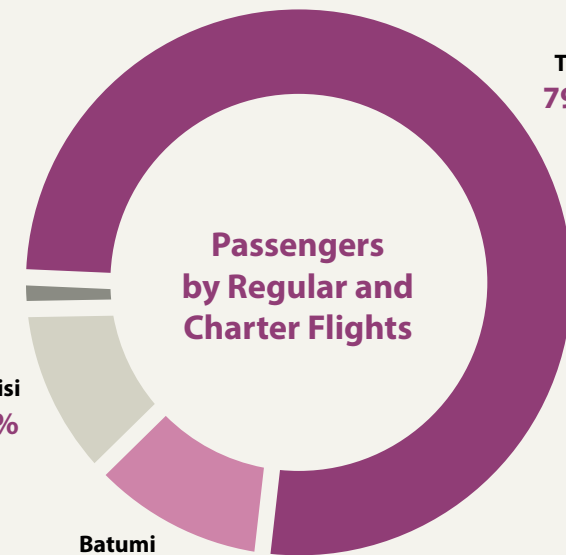


Source: Georgian Civil Aviation Agency

**Mestia**  
0.1%

**Kutaisi**  
9.6%

**Batumi**  
11%



**Tbilisi**  
79.3%

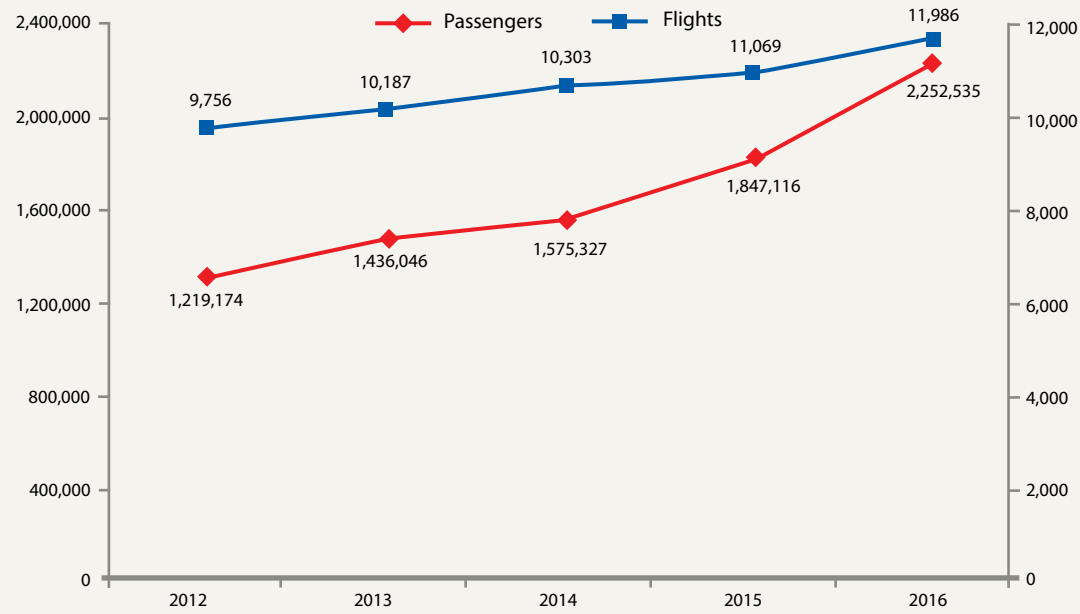
Source: Georgian Civil Aviation Agency

### Direct Flights from Georgia



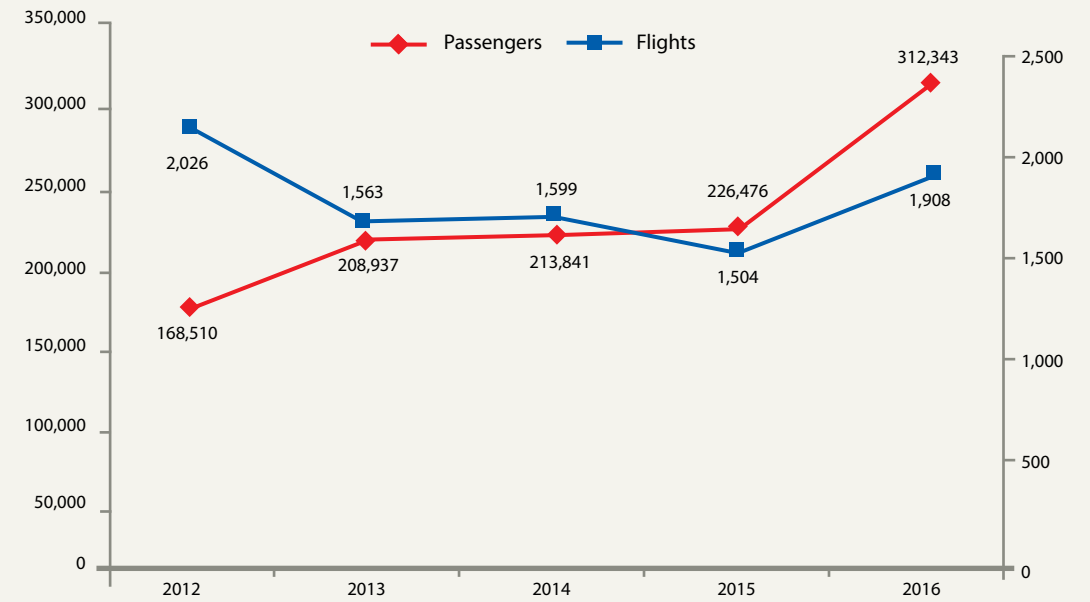
Source: Georgian Civil Aviation Agency

## Tbilisi International Airport: Passengers and Flights



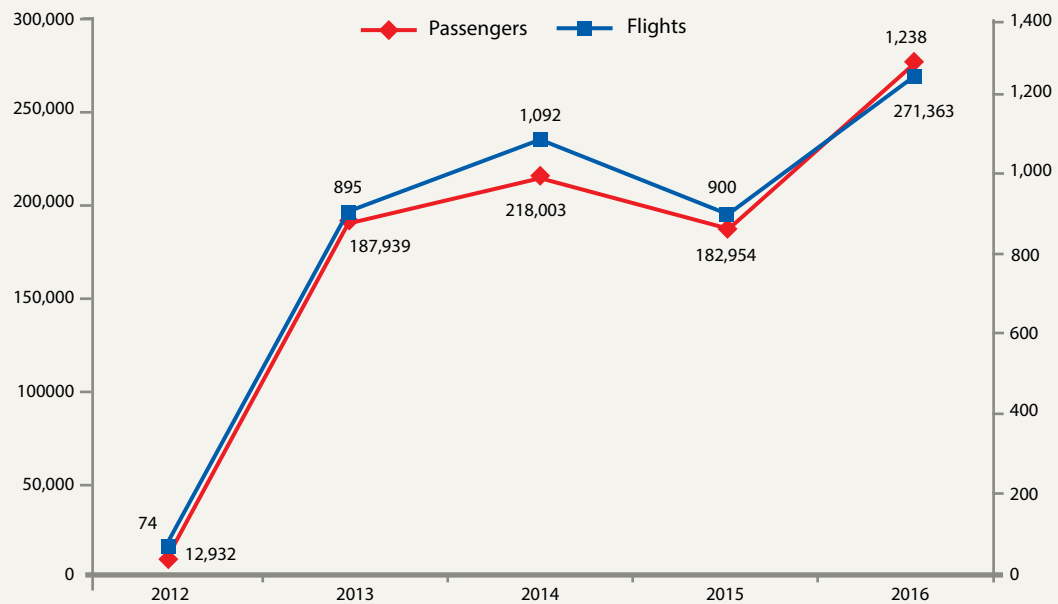
Source: Georgian Civil Aviation Agency

## Batumi International Airport: Passengers and Flights



Source: Georgian Civil Aviation Agency

## Kutaisi International Airport: Passengers and Flights



Source: Georgian Civil Aviation Agency

## New Routes from Georgia in 2016

Airline	Route	Frequency
Wizz Air	Kutaisi - Bergamo - Kutaisi Kutaisi - Berlin - Kutaisi Kutaisi - Dortmund - Kutaisi Kutaisi - Memmingen - Kutaisi	Twice a Week
	Kutaisi - Larnaka - Kutaisi Kutaisi - Thessaloniki - Kutaisi Kutaisi - Sophia - Kutaisi	Three Times a Week
	Scat	Batumi - Aktau - Batumi
Air Arabia	Batumi - Sharja - Batumi	Twice a Week
ATA Airlines	Batumi - Tehran - Batumi	Once a Week
Ural Airlines	Batumi - Petersburg - Batumi	Twice a Week
	Batumi - Yekaterinburg - Batumi	Three 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 (GNTA) is 1,765, with a total of 57,049 beds.

Tbilisi has the largest numbers of beds - 14,837 (26%), followed by the Ajara region with 11,615 beds (20.4%).

Tbilisi boasts several international hotel brands: Radisson, Marriott, Sheraton, Holiday Inn, Citadine, Cron Palace, Best Western, Mercure, Hotels and Preference Hualing. In 2016, The Biltmore Hotel was added to this list.

A number of brand hotels have also started operating in the spa resorts of Georgia. In Borjomi, Golden Tulip Borjomi Palace joined the list of existing hotel brands, which include the Rixos Hotel and the Crowne Plaza.



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, Park Inn by Radisson, Ramada Encore, Rixos Tbilisi, Hyatt Regency, Moxy Marriott, Intercontinental, Radisson Blu Telegraph, Golden Tulip, Marriott Autograph collection-Panorama Freedom Square, Marriott Autograph Collection-Panorama Sololaki, Pullman Hotels and Resorts, and Tabori Ridge Recreation & Golf Resort. In the regions, the following hotel construction projects are planned: Rooms Hotel (Batumi), Babylon Tower (Batumi), Courtyard by Marriott (Batumi), Best Western VIB (Batumi), Porta Batumi Tower (Batumi), Le Meridian (Batumi), Swissotel (Batumi), Twin Tower (Batumi), Wyndham Hotels and Resorts (Batumi), Radisson Blu Gudauri (Gudauri), Best Western Hotels & Resorts (Kutaisi), Radisson Blu Resorts (Tsinandali) and Golden Tulip (Telavi).

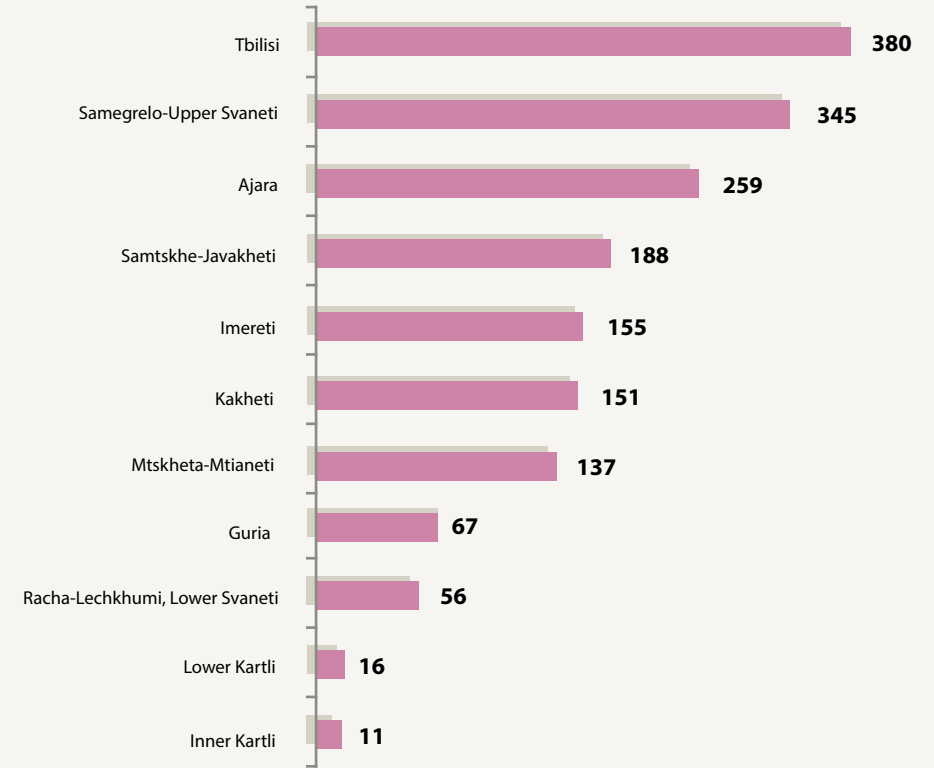
The majority of hotels being constructed are located in Tbilisi, Ajara, Samtskhe-Javakheti, Imereti and Kakheti Regions.



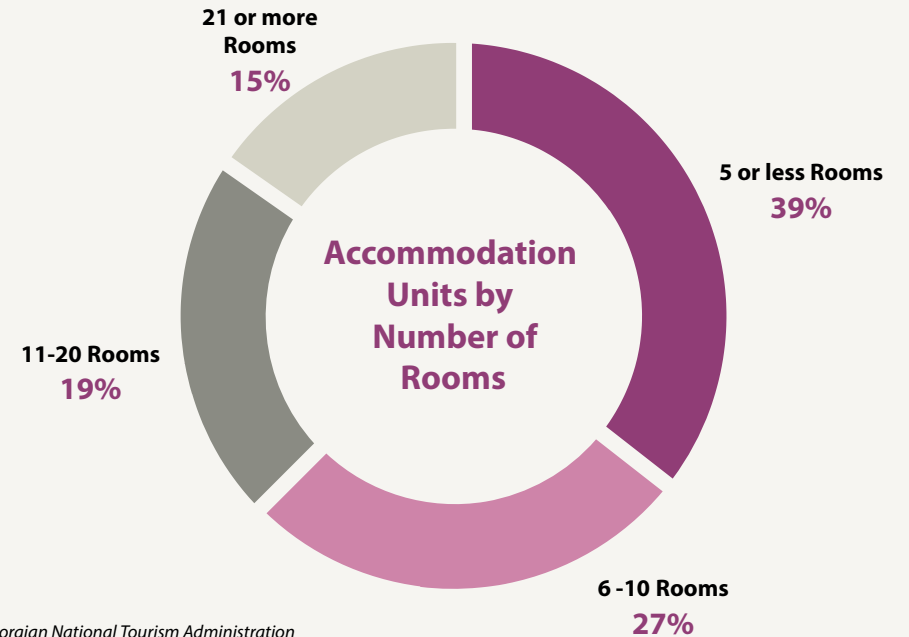
In this report, "brand hotels" are defined as: Best Western Tbilisi; Citadines Apart'hotel; Courtyard Marriot Hotel; Cron Palace Hotel; Crowne Plaza borjomi; Divan Suites Batumi; Hilton Hotel & resorts; Holiday Inn Tbilisi; Hotels and Preference Hualing Tbilisi; Mercure Tbilisi Old Town; Radisson BLU Hotel, Batumi; Radisson BLU Iveria Hotel, Tbilisi; Rixos Hotel, Borjomi; Rooms Hotel kazbegi; Rooms Hotel Tbilisi; Sheraton Batumi Hotel; Sheraton Metechi Palace Hotel, Tbilisi; Tbilisi Marriott Hotels; Biltmore Hotel Tbilisi; Golden Tulip Borjomi.



## Number of Accommodation Units

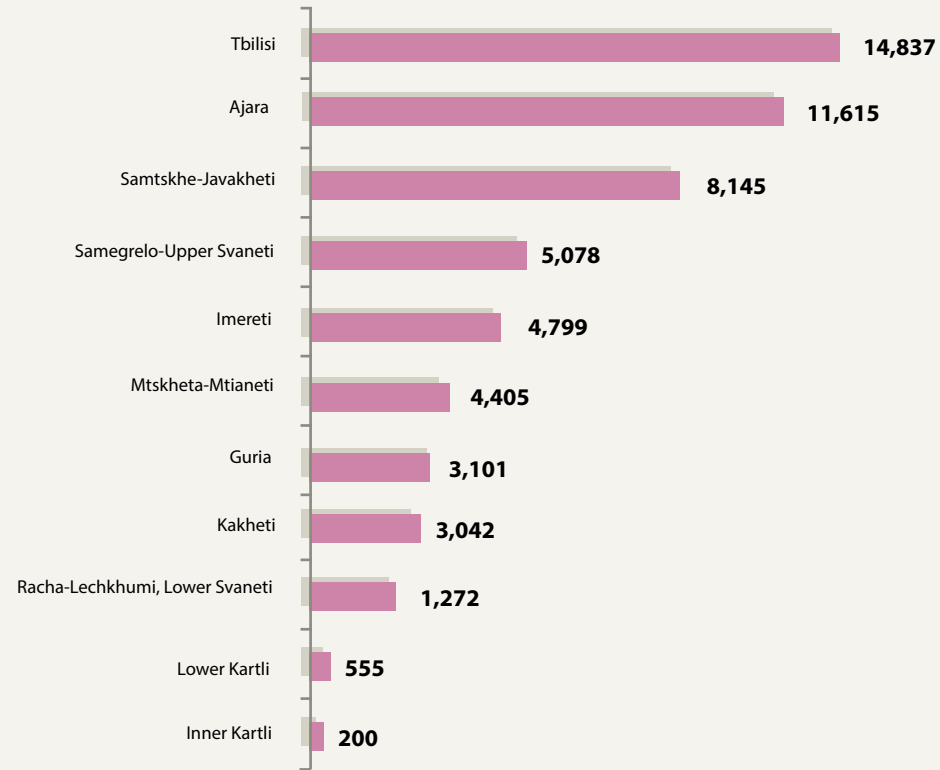


Source: Georgian National Tourism Administration



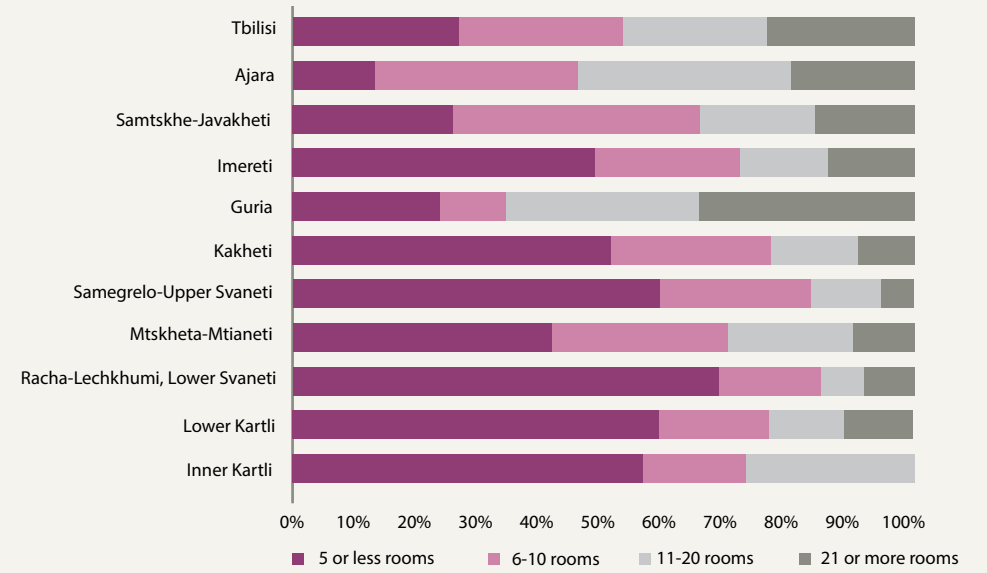
Source: Georgian National Tourism Administration

## Bed Capacity by Region



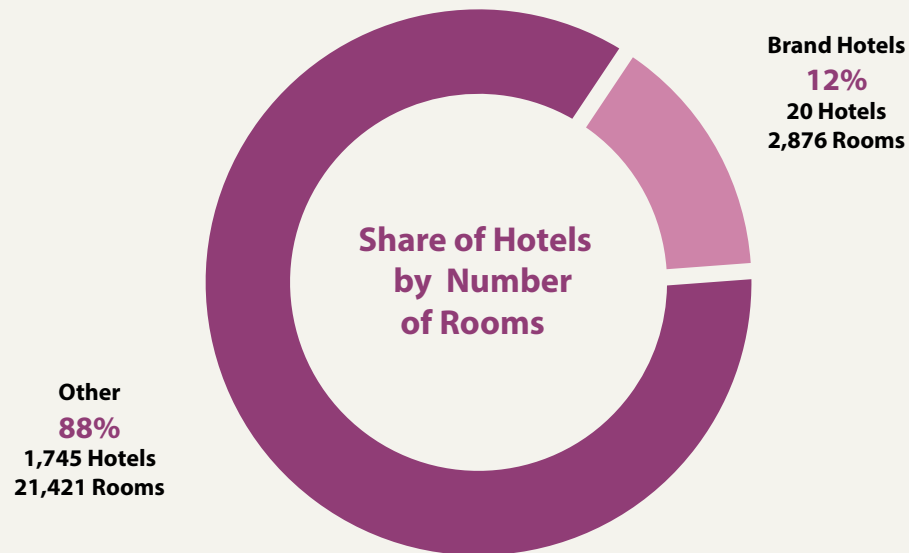
Source: Georgian National Tourism Administration

## Accommodation Units by Type and Region



Source: Georgian National Tourism Administration

## Share of Hotels by Number of Rooms



Source: Georgian National Tourism Administration

## Distribution of Brand Hotels

City	Quantity	Number of Rooms	Number of Beds
Tbilisi	12	1,770	3,294
Batumi	4	682	1,360
Borjomi	3	268	706
Stephantsminda (Kazbegi)	1	156	312

Source: Georgian National Tourism Administration

# HOTELS OPENED IN 2016:



THE BILTMORE HOTEL / TBILISI  
 ART BOUTIQUE HOTEL / TBILISI  
 MUSEUM HOTEL / TBILISI  
 HOTEL CITY AVENUE / TBILISI  
 ASTORIA HOTEL / TBILISI  
 HOTEL GOLDEN PALACE / TBILISI  
 EUPHORIA HOTEL / BATUMI

ERA PALACE / KVARIATI  
 CASTELLO MARE HOTEL & WELLNESS  
 RESORTS / TSIKHISDZIRI  
 GOLDEN TULIP BORJOMI PALACE / BORJOMI  
 GINO WELLNESS / MTSKHETA



**3,400+**

Beds

## CONSTRUCTION OF PLANNED ACCOMODATION UNITS (2017-2019)

HILTON GARDEN INN / TBILISI  
 PARK INN BY RADISSON / TBILISI  
 RIXOS / TBILISI  
 HYATT REGENCY / TBILISI  
 MOXY MARRIOTT / TBILISI  
 INTERCONTINENTAL / TBILISI  
 PULLMAN HOTELS & RESORTS / TBILISI  
 RADISSON BLU TELEGRAPH / TBILISI  
 RAMADA ENCORE / TBILISI  
 GOLDEN TULIP / TBILISI  
 MARRIOTT AUTOGRAPH COLLECTION  
 PANORAMA FREEDOM SQUARE / TBILISI  
 MARRIOTT AUTOGRAPH COLLECTION -  
 PANORAMA SOLOLAKI / TBILISI

ROOMS HOTEL / BATUMI  
 COURTYARD BY MARRIOTT / BATUMI  
 BEST WESTERN VIB /BATUMI  
 SWISSOTEL / BATUMI  
 LE MERIDIEN HOTELS / BATUMI  
 WYNDHAM HOTELS & RESORTS / BATUMI  
 RADISSON BLU RESORT / TSINANDALI  
 RADISSON BLU GUDAURI / GUDAURI  
 BEST WESTERN HOTELS & RESORTS /  
 KUTAISI  
 GOLDEN TULIP TELAVI / TELAVI



**19,100+**

Beds

## Protected Areas

The main function of protected areas is to protect the natural heritage of Georgia. In addition, they have other functions, one of which is to contribute to ecotourism development. Over time, it has become clear to Georgian society that protected areas aren't banned territories, but can also be used for tourist purposes.

There are 88 different categories of protected areas in Georgia: 14 Strict Nature Reserves, 11 National Parks, 42 Natural Monuments, 19 Managed Natural Reserves, and 2 Protected Landscapes. The total size of all protected areas is 597,556 ha, which comprises 8.57% of the total territory of the country.

The number of visitors registered in protected areas in 2016 was 734,874. Compared to the previous year, this was a growth rate of 41.8%. Out of the total number of visitors, 42% were foreigners.

Prometheus Cave had 138,227 visitors (18.8%) and Kazbegi National Park 134,111 (18.2%); these two sites have the highest number of visitors. The share of foreign visitors exceeded Georgians in Prometheus, Kazbegi, Mtirala, Martvili and Tusheti Protected Areas. Most foreigners visited Prometheus Cave and Kazbegi National Park.

The number of foreign visitors in protected areas was 310,477 in 2016, which compared to the previous year was a growth rate of 71.2%. The majority of international visitors were Russians - 25%, Israeli - 16%, Polish - 7%, Ukrainian - 6%, German - 5%.

In 2016, income from tourism services in protected areas was 2,313,697 Gel, with growth of 45.5%. Calculated by amount of income, Prometheus Cave was the leader - 927,994, followed by Martvili Canyon - 433,506, Sataplia - 386,541, and Okatse Canyon - 318,537.

### Basic Information

The reason for designating areas to protect and recover important national heritage, unique, rare and typical ecosystems, plants and animal species, natural creations and cultural resources. Protected areas can be used for scientific, educational and recreation purposes.

The Agency of Protected Areas is the organization responsible for development of protected areas. Its main function is the management of Strict Nature reserves, National Parks, natural Monuments, Managed Nature Reserves, and Protected Landscapes.

### Methodology

Visitors fill in registration forms at visitor centers (age, gender, nationality and etc.). data is collected by territorial administrations and the Agency of Protected Areas.

There are five categories of protected areas in Georgia:

**Strict Nature Reserve** - Protected area designed mainly for science or wilderness protection. Tourist activities aren't allowed.

**National park** - Protected areas created mainly for the conservation of ecosystem, education and ecotourism development.

**Natural Monument** - protected area promoted mainly for conservation of specific natural features (protection of all small size territories).

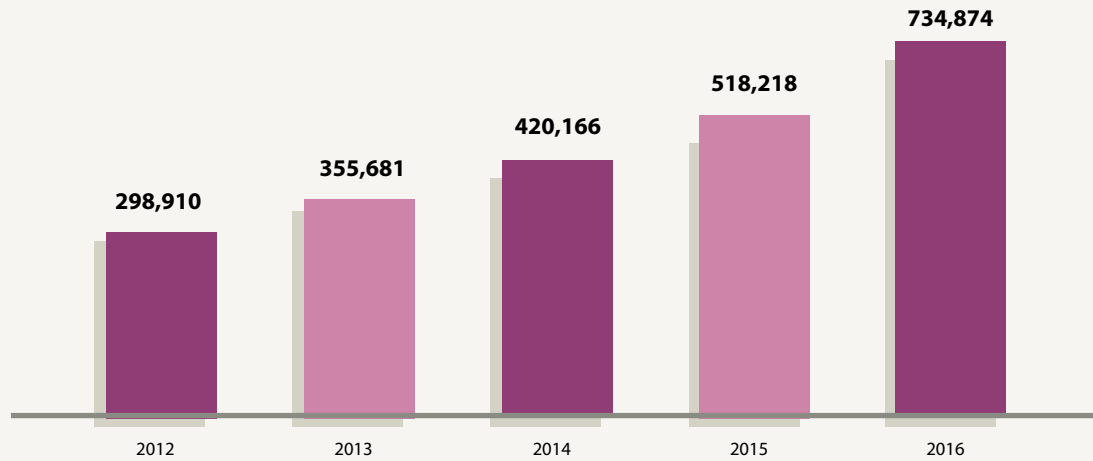
**Managed Natural Reserve** - Protected area dedicated mainly for conservation through management intervention.

**Protected Landscape** - Protected area managed mainly for landscape/seascape protection and recreation.

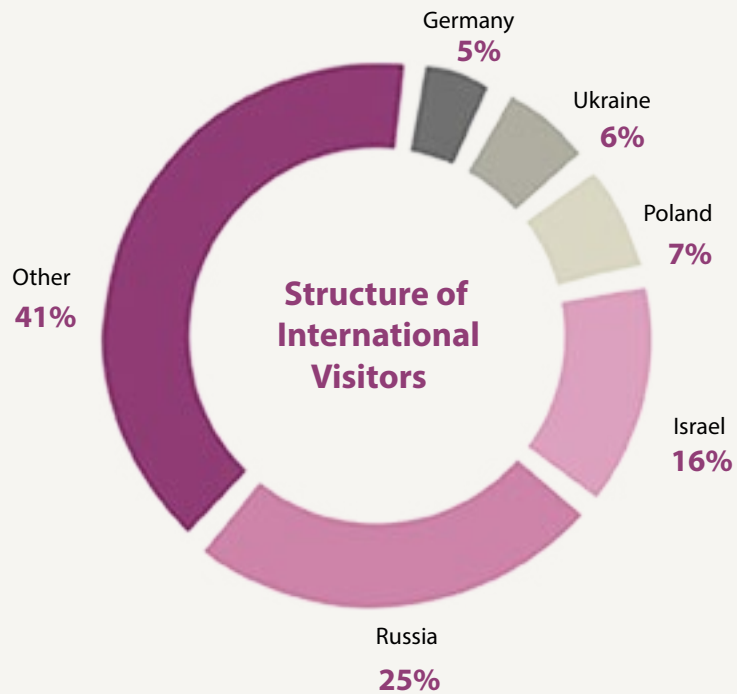
more detailed information about the Agency of Protected Areas is available at:

<http://www.apa.gov.ge/>

## Visitors of Protected Areas by Year



Source: Agency of Protected Areas



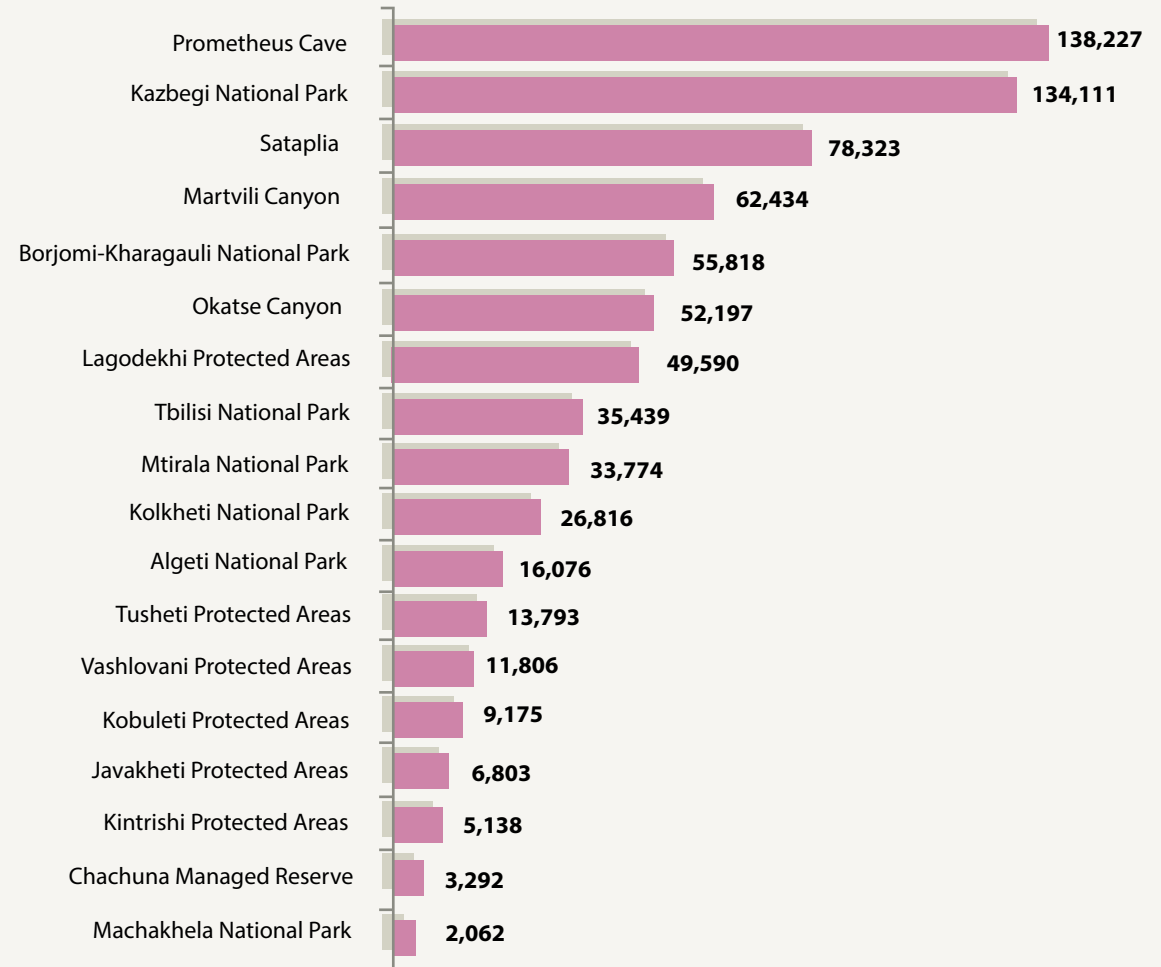
Source: Agency of Protected Areas

## Visitors of Protected Areas by Nationalities

	2012	2013	2014	2015	2016	% Change 2015-2016
Total	298,910	355,681	420,166	518,218	734,874	41.8%
Foreigners	67,955	98,245	147,664	181,329	310,477	71.2%
Georgians	230,955	257,436	272,502	336,889	424,397	26%

Source: Agency of Protected Areas

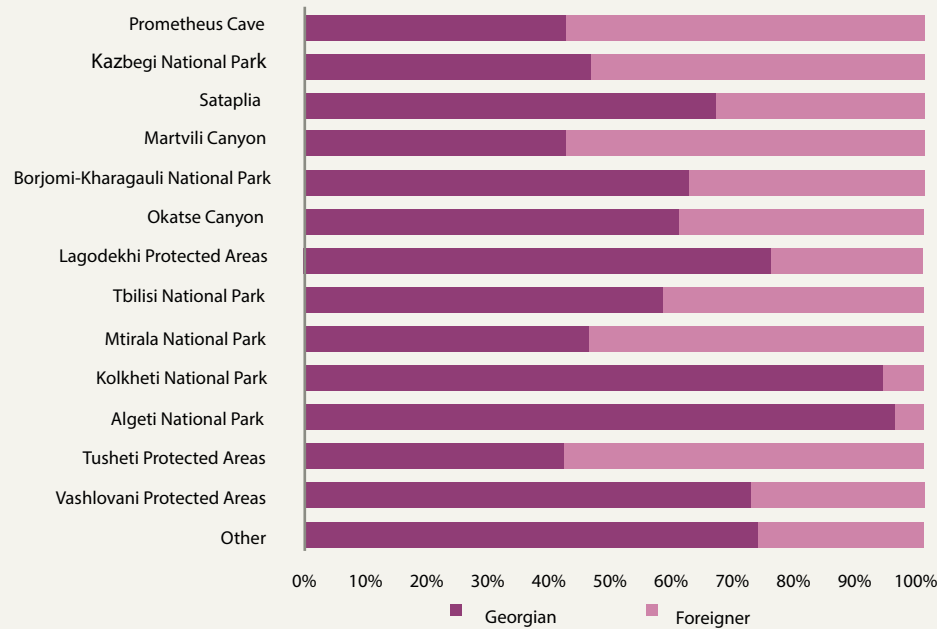
## Visitors Statistics by Protected Areas



Source: Agency of Protected Areas

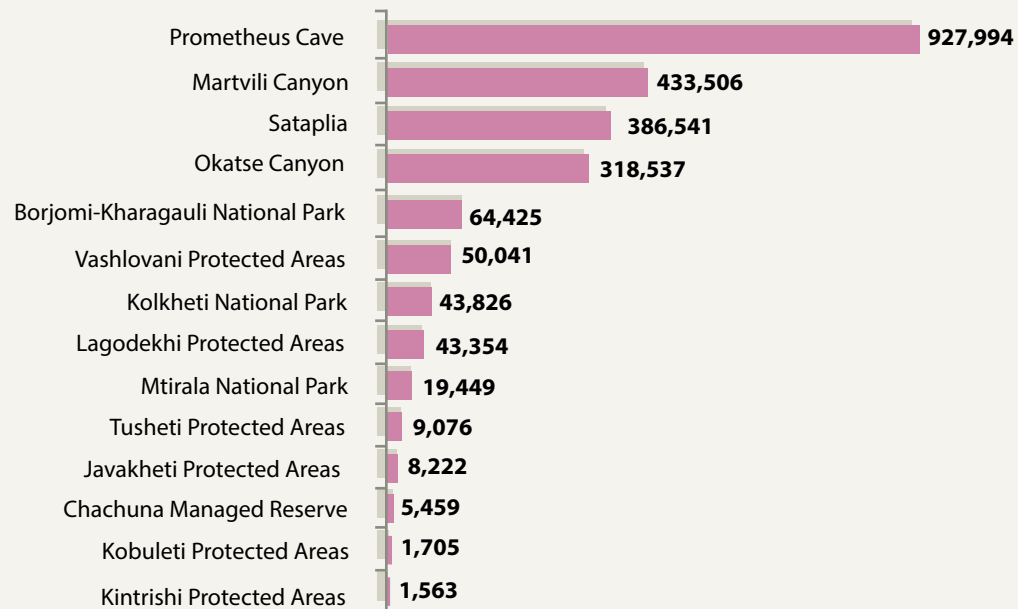


## Georgian and Foreign Visitors in Protected Areas



Source: Agency of Protected Areas

## Revenues by Protected Areas



Source: Agency of Protected Areas

## Sector Outlook

Despite many obstacles, the Georgian Tourism sector continued to grow in 2016. 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 (GNTA) 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 four cities, Kutaisi, Kvareli, Ozurgeti and Akhaltsike, two-sided lighted signs were installed. In the regions of Imereti and Guria, research was conducted to investigate hiking trails, while in Upper Svaneti and mountainous Samegrelo, seven trails were marked. Within the Project "WineRoad," facilities were inventoried and new recommended signs were installed for wine facilities.

In the winter resorts of Bakuriani and Gudauri, photo frames were installed to give visitors the opportunity to take memory photos. Two tourist information centres were added in Poti and Bakuriani to the existing 17 in Georgia. A new standard for marking hiking trails was created, meaning that planning and marking of all hiking trails in Georgia will be conducted in accordance with the newly-defined rules.



The development of inclusive tourism is a priority for the GNTA. Mtskheta's historical monuments were adapted for persons with disabilities (wheelchair users, the blind and people with residual sights) including Svetitskhoveli, Shiomgvime, Antiokia and the Samtavro mother monastery. In addition to monuments, the tourist information center was also adapted in Mtskheta. Proper infrastructure (Panduses, crane-lift) was installed for wheelchair users.

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 have been provided for 1,270 representatives of the industry. In addition, for people interested in the tourism sector, catalogues about spa resorts and Kakheti school tours were published. A catalogue about spa resorts was published in Russian and English.

For the purpose of stimulating domestic tourism, within the framework of the project "Get to know Georgia" 11 press tours were organized in nine regions. Winter and summer season openings were arranged in different cities and resorts.



Choosing the right markets is unquestionably an integral part of marketing. Along with maintaining existing markets, the GNTA also concentrated on tapping into new countries, including the Persian Gulf countries and China, which carry huge potential. In 2016, the GNTA participated in 21 international and domestic tourism fairs, conducted marketing campaigns in 16 target markets, and hosted 99 press and fam trips (590 journalists and 287 tour operators). In addition, the GNTA conducted an advertising campaigns on the international online platform tripadvisor.com in 12 countries, and online campaigns on web-pages and social networks in 10 countries.

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. A convention bureau began functioning within the structure of GNTA to stimulate the flow of business travelers into the country.

Georgia has been successful in international relations as well. In 2016, agreements of cooperation in the field of tourism were signed with China, Belarus and Qatar. In addition, Georgia became member of American Society of Travel Agents.

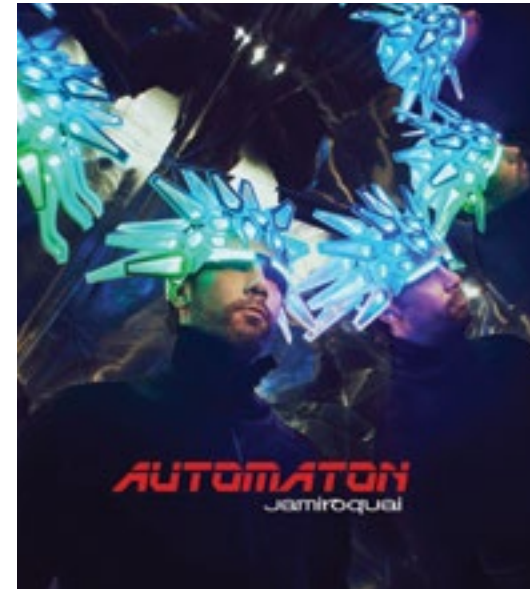
In 2016, Georgia hosted several high-profile events, including the Sixteenth Meeting of the Committee on Statistics and the Tourism Satellite Account, the First UNWTO Global Conference on Wine Tourism, and the OSCE Parliamentary Assembly. The "Project Check-in Georgia" hosted several music stars, including Eros Ramazzotti, Robbie Williams, Maroon 5 and Jose Carreras.



### Third Euro-Asian Mountain Resorts Conference

With the support of the Ministry of Economy and Sustainable Development of Georgia's LEPL-GNTA, Mountain Resorts Development Company and UN World Trade Organization (UNWTO), The Third Conference of the Euro-Asian Mountain Resorts of the UNWTO will be held in Georgia, on 4-7 April 2017. The conference will be attended by UNWTO high-ranking officials, including the Secretary General of the organization, Mr. Taleb Rifai, as well as up to 250 delegates.

Hosting the conference is a very important initiative for demonstrating the potential of the country's tourism and mountain resorts. Within the scope of the event, the perspectives of sustainable development of mountain resorts in Georgia, and the best experience of foreign experts in this direction were shared.



### Project Check-in Georgia

Project Check in Georgia 2017 consists of cultural and sports events, which will be held in Tbilisi and regions of Georgia.

Within the framework of this project, world music star visit and perform in Georgia. Among the invited stars is the famous rock band Aerosmith, whose concert will be held on May 20 at Black Sea Arena concert hall, during their last world symbolic name „Aero-vederci, baby," and popular pop singer Jamiroquai, which will perform in Batumi on July 28.

Overall, 45 festivals and concerts are being organized with Georgian and Foreign performers. Check-in Georgia has already developed as a traditional project. It has been successful for two years, and will continue to diversify in the future.

### The 15th Junior Eurovision Song Contest (JESC)

The 15th Junior Eurovision Song Contest (JESC) will take place in Georgia from November 19th to November 26, 2017. Georgia has won the contest three times, setting a new record for Junior Eurovision. No other countries has had similar results.



### The 18th Convention of the World Federation of Tourist Guide Associations

In January 2019, Georgia will host the 18th Convention of the World Federation of Tourist Guide associations, with 300 to 500 delegates from 70 countries. Conducting the convention in Georgia will be an important milestone for the development of the tourism sector and tourist guide profession in the country. Georgia was nominated as a candidate for hosting the 18th Convention in Iran by the Georgian Association of Guides, with support of National Tourism Administration. Georgia was competing with the guide associations of Thailand and New York. Our country was highly appreciated and gained the majority of votes from the delegates of different countries.

## International Arrivals (UNWTO Classification)

	2015	2016	% Change
<b>Central and Eastern Europe</b>	4,115,224	4,460,651	8%
Azerbaijan	1,393,257	1,523,703	9%
Armenia	1,468,888	1,496,437	2%
Russia	926,144	1,038,750	12%
Ukraine	141,734	174,858	23%
Kazakhstan	36,777	48,849	33%
Poland	41,425	44,436	7%
Belarus	28,959	37,110	28%
Lithuania	12,360	14,413	17%
Bulgaria	10,639	12,815	20%
Latvia	8,901	11,055	24%
Uzbekistan	7,058	9,837	39%
Moldova	8,185	9,272	13%
Czech Republic	7,425	8,578	16%
Turkmenistan	3,399	5,767	70%
Hungary	4,705	5,721	22%
Others	15,368	19,050	24%
<b>Northern Europe</b>	33,872	35,694	5%
United Kingdom	19,233	19,198	0%
Sweden	4,742	5,290	12%
Denmark	2,772	3,228	16%
Others	7,125	7,978	12%
<b>Southern Europe</b>	46,784	48,541	4%
Greece	19,221	20,340	6%
Italy	11,955	12,748	7%
Spain	6,740	6,495	-4%
Others	8,868	8,958	1%
<b>Western Europe</b>	75,540	81,813	8%
Germany	36,826	40,915	11%
France	14,087	15,044	7%
Netherlands	9,635	10,081	5%
Austria	5,523	5,750	4%
Belgium	4,874	5,061	4%
Switzerland	4,383	4,702	7%

Others	212	260	23%
<b>East/Med Europe</b>	1,452,014	1,349,585	-7%
Turkey	1,391,721	1,256,561	-10%
Israel	59,487	92,215	55%
Others	806	809	0%
<b>Caribbean</b>	1,216	1,209	-1%
<b>Central Amer.</b>	189	244	29%
<b>North Amer.</b>	35,099	38,836	11%
United States of America	31,147	34,250	10%
Canada	3,600	4,136	15%
Others	352	450	28%
<b>South Amer.</b>	2,194	2,635	20%
<b>North-East Asia</b>	19,026	24,033	26%
China	9,555	14,075	47%
Japan	5,545	5,565	0%
Others	3,926	4,393	12%
<b>Oceania</b>	3,259	3,485	7%
<b>South Asia</b>	40,550	191,538	372%
Iran	25,273	147,937	485%
Others	15,277	43,601	185%
<b>South-East Asia</b>	10,713	20,914	95%
Philippines	8,410	16,882	101%
Others	2,303	4,032	75%
<b>Near/Middle East</b>	56,682	88,326	56%
Saudi Arabia	9,850	21,257	116%
United Arab Emirates	17,230	18,706	9%
Oman	6,773	11,885	75%
Egypt	2,425	6,333	161%
Others	20,404	30,145	48%
<b>East Africa</b>	1,212	2,337	93%
<b>West Africa</b>	978	900	-8%
<b>South Africa</b>	1,332	1,374	3%
<b>North Africa</b>	792	1,878	137%
<b>Central Africa</b>	97	144	48%
<b>Other Countries</b>	4,321	6,366	47%
<b>Total</b>	5,901,094	6,360,503	8%

**This report was prepared by the Research and Planning Department of the Georgian National Tourism Administration**

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National Bank of Georgia



Agency of protected areas



Georgian Civil Aviation Agency



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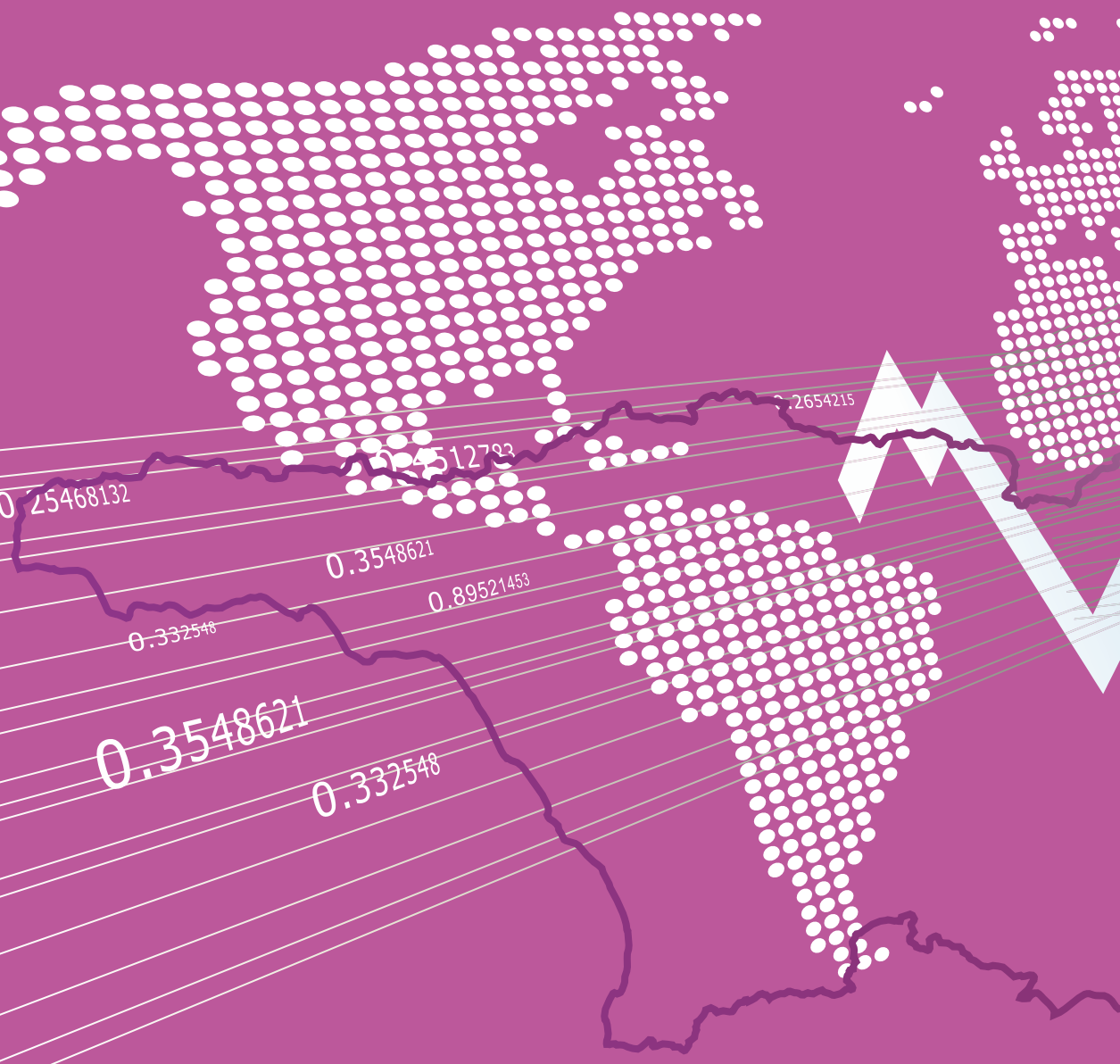
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