



2018

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 2018. It covers statistical data, trends, activities undertaken by the GNTA to promote tourism, and Georgia's standing in 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 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' experiences, maximize their expenditures to significantly contribute to the national economy, and to cooperate effectively with strategic partners.

From a statistical viewpoint, the performance of the tourism industry in Georgia in 2018 can be characterized as a period of further growth. In 2018, the number of trips conducted by nonresident travelers grew by 777,035, surpassing the eight million mark for the first time.

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 71.8% of Georgia's service export revenue comes from tourism. Revenues from international tourism displayed an increasing trend and reached 3.2 billion USD in 2018. Tourism made up 7.6% of total GDP. This is due to a 475 million GEL increase in value added from tourism-related activities.

In 2018, there were a total 2,390 accommodation units registered in the GNTA database, comprising 86,772 beds. Classification of accommodations by the number of rooms showed that accommodation with five or fewer rooms was the largest category, with 876 such units (representing 36.7% of the total).

Georgia has been successful in international relations as well. Mr. Zurab Pololikashvili was elected by the 22nd Session of the World Tourism Organization (UNWTO) General Assembly as Secretary-General of the UNWTO and has officially held this position since 1 January 2018.

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 trips to Georgia is expected to keep increasing, thanks to various steps taken by both the government in general and the GNTA in particular. The Georgian Tourism Strategy created in 2015 presents a ten year plan which should play a key role in accomplishing this aim successfully.

In 2018, the GNTA participated in 24 international and domestic tourism fairs and hosted 150 press and FAM trips (800 journalists and bloggers and 285 tour operators). In addition, the Georgian National Tourism Administration conducted an advertising campaign on the international online platform TripAdvisor.com in 15 countries, on Expedia in four countries, on Lonely Planet in European countries, and on National Geographic in European and Middle Eastern countries. Furthermore, the online campaign "Emotions are Georgia" was carried out on Youtube, Facebook, Instagram in 11 countries. Advertising campaigns were conducted on global leading channels, including: CNN, Euronews and BBC.

Among the actions taken by the GNTA to increase the number of visits 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 Trips

International traveler trips in Georgia have been growing rapidly in recent years. In 2018, they reached a record number of 8,679,544 representing an annual growth rate of 9.8%.

International traveler trips in Georgia include trips made by international visitors (83%) and other (non-tourist) trips (17%). Out of the total number of international visitor trips, 66% were tourist trips, and 34% were same-day trips.

The most popular season for international visitors is summer. During this season, the number of trips was 2,492,924 (June: 606,792; July: 845,588; August: 1,040,544), which accounted for 34.6% of all trips.

The majority of trips conducted by international visitors (excluding nonresident citizens of Georgia), 77.3% (5,196,808), were from neighboring countries. Only 22.7% (1,530,153) were from other countries.

Azerbaijan was the leader in terms of international visitor trips - 1,424,610 (an increase of 9.5%), while Russia occupied first place in terms of growth (+269,700). The highest growth in the number of trips by Russian visitors was registered in September (+40,454) and October (+32,590). There was also a significant growth in the number of trips by Azerbaijani (+123,054), Turkish (+91,279) and Israeli (+41,882) visitors. This growth was primarily the result of new direct flights, press trips and marketing campaigns administered by the Georgian National Tourism Administration.

In 2018, 385,181 trips were conducted by EU visitors (36% more than the previous year) in Georgia, which is 5.7% of total trips (excluding nonresident citizens of Georgia).

The largest share of international visitor trips in Georgia, 5,314,984 (73.8%), were by land transport, followed 1,788,417 (24.8%) by air transport. Trips by rail and sea were 67,478 (0.9%) and 32,471 (0.5%), respectively. The busiest border was Tbilisi Airport, which saw 1,402,157 trips in 2018, amounting to 19.5% of all trips to Georgia. This was followed by Sarpi (Turkish border) at 18% and Kazbegi (Russian border) at 15.7%.

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 21 border checkpoints. It should be noted that one more border checkpoint - the Railway of Kartsakhi - was added to the list in 2017.

Main published indicators:

In line with UNWTO recommendations, an international traveler is someone who moves between different geographic locations for any purpose and any duration. It excludes foreign citizens who are Georgian residents and includes Georgian citizens who are foreign residents.

An international visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. The usual environment of an individual, a key concept in tourism, is defined as the geographical area within which an individual conducts his/her regular life routines. For defining the usual environment in Georgia, travelers conducting eight or more trips are excluded from the data.

A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise.

Others (non-tourist) are characterized by the reason for which they are excluded from being defined as visitors: either being less than 15 years old, or being within their usual environment.

More detailed information can be found on the Georgian National Tourism Administration's website: www.gnta.ge

The share of trips from neighboring countries in the total number of international traveler trips is decreasing. In 2018, trips from neighboring countries totaled 5,196,808, registering a 9.8% growth rate compared with the previous year. The increase in number of trips from other countries was rather large, reaching 1,530,153 trips. As a result, the share of neighboring countries in total number of trips decreased from 78.5% to 77.3%. Structural changes in trips are foreseen by Georgia's tourism strategy.

Germany outstripped Kazakhstan and Saudi Arabia in the number of international visitor trips. Germany entered the list of top 10 countries by registering 64,486 annual trips (an increase of 49.7%) in 2018.

Trips conducted by air transport are increasing significantly. The number of air transport visitor trips reached 1,788,417, representing a 24.2% growth rate. As a result, the share of air transport passengers in total visits increased from 22.2% to 24.8%.

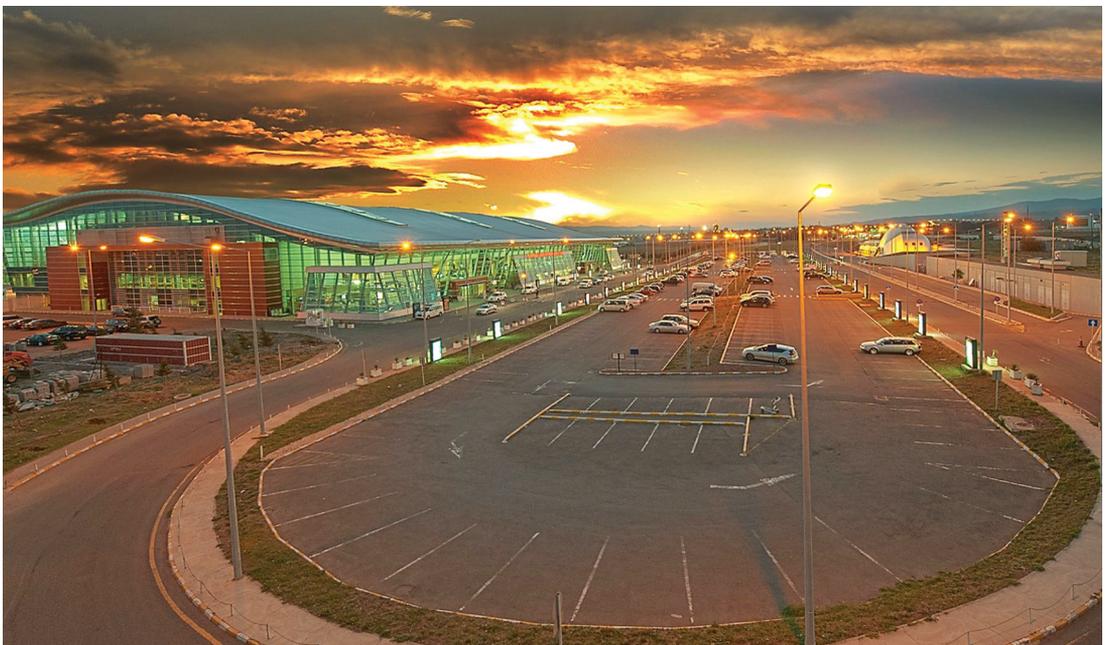
The number of international visitor trips from the CIS and European Union to Georgia is increasing. In 2018, the number of trips from the CIS increased by 10.4%, reaching 4,252,447. High growth was recorded from Kyrgyzstan (+45.8%), Belarus (+42.9%), Kazakhstan (+24.8%) and Russia (+23.8%). Significant growth was registered from European Union countries as well. The number of trips by European visitors reached 385,181 (an increase of 36%), with remarkable growth from the following countries:

Estonia (an increase of 80%), Slovakia (an increase of 62%), Romania (an increase of 59%), the Netherlands (an increase of 56%). Germany (an increase of 50%), Latvia (an increase of 50%), Czech Republic (an increase of 44%), Poland (an increase of 37%), France (an increase of 36%), United Kingdom (an increase of 31%), and Italy (an increase of 30%).

Russia is the leader in number of international tourist trips. The number of trips conducted by Russian tourists is increasing significantly every year. In 2018, the number of international trips from Russia surpassed the one million mark for the first time and reached 1,083,874 with a growth rate of 31.3%.

The share of tourist trips in the number of international visitor trips from non-neighboring countries is comparably larger (excluding nonresident citizens of Georgia). The structure of trips from neighboring and non-neighboring countries are significantly different from each other. While the share of tourist trips in total visitor trips from neighboring countries was only 55.4% (2,881,538), the same indicator for non-neighboring countries equaled 94.8% (1,450,685).

Record growth in total visitor trips conducted by visitors was primarily caused by tourist trips. The total number of trips increased by 720,520, and the share of tourist trips in this growth was 95.4% (+687,466).

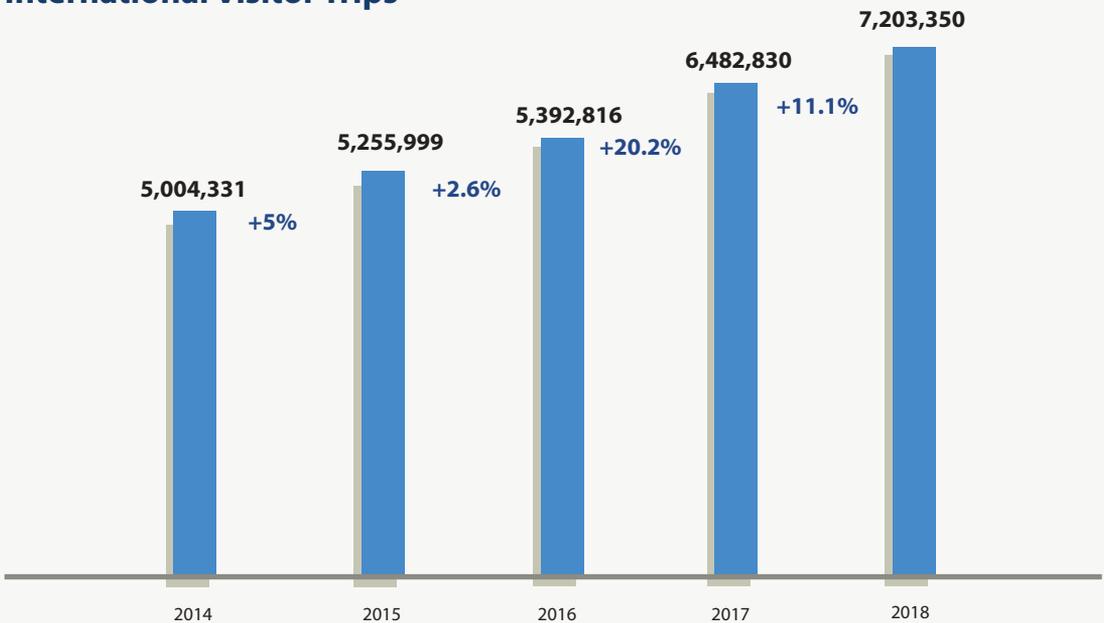


International Travel Classification

	2016	2017	2018	% Change 2017-2018
International Traveler Trips	6,719,975	7,902,509	8,679,544	9.8%
International Visitor Trips	5,392,816	6,482,830	7,203,350	11.1%
Tourist Trips	3,297,275	4,069,354	4,756,820	16.9%
Same Day Trips	2,095,541	2,413,476	2,446,530	1.4%
Other Trips (Non-tourist)	1,327,159	1,419,679	1,476,194	4%

Source: The Ministry of Internal Affairs of Georgia

International Visitor Trips



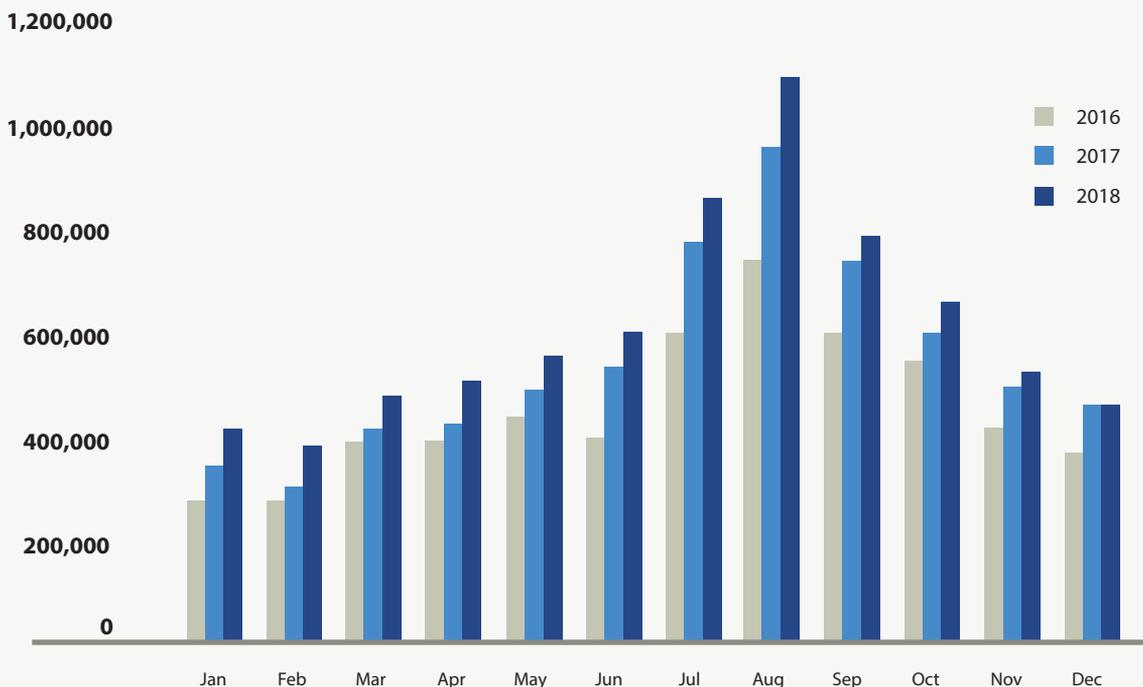
Source: The Ministry of Internal Affairs of Georgia

International Visitor Trips by Region

Region	2017	2018	Change	% Change
Total	6,482,830	7,203,350	720,520	11.1%
Europe	5,440,839	6,087,598	646,759	11.9%
Americas	42,485	55,188	12,703	29.9%
East Asia/Pacific	397,148	444,631	47,483	12%
Africa	8,193	8,356	163	2%
Middle East	131,533	125,773	-5,760	-4.4%

Source: The Ministry of Internal Affairs of Georgia

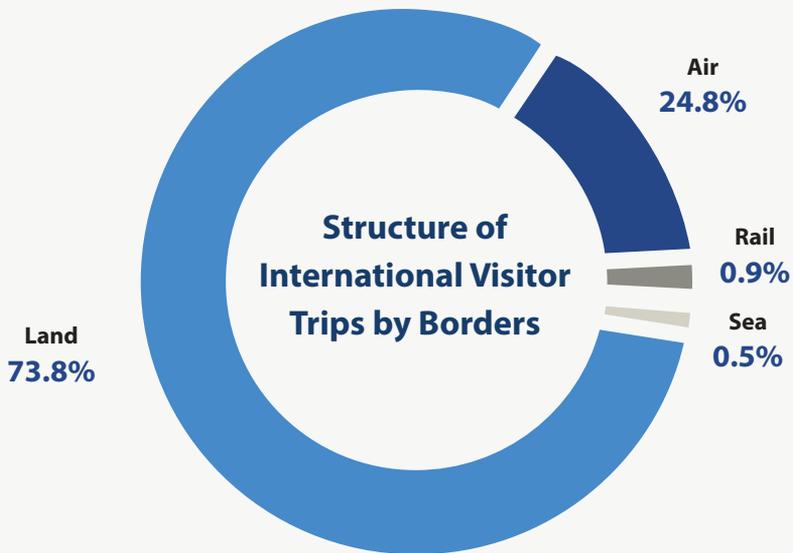
International Visitor Trips by Month



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 Visitor Trips top 10 Countries

Country	2017	2018	Change	% Change
Azerbaijan	1,301,556	1,424,610	123,054	9.5%
Russia	1,135,057	1,404,757	269,700	23.8%
Armenia	1,287,168	1,268,886	-18,282	-1.4%
Turkey	1,007,276	1,098,555	91,279	9.1%
Georgia (nonresident)	456,132	476,389	20,257	4.4%
Iran	282,549	291,070	8,521	3%
Ukraine	169,862	177,058	7,196	4.2%
Israel	115,040	156,922	41,882	36.4%
Poland	48,913	66,903	17,990	36.8%
Germany	43,090	64,486	21,396	49.7%

Source: The Ministry of Internal Affairs of Georgia

International Tourist Trips Top 10 Countries

Country	2017	2018	Change	% Change
Russia	825,437	1,083,874	258,437	31.3%
Azerbaijan	608,682	697,782	89,100	14.6%
Turkey	547,983	589,340	41,357	7.5%
Armenia	466,449	510,542	44,093	9.5%
Georgia (nonresident)	404,584	424,597	20,013	4.9%
Iran	273,842	280,735	6,893	2.5%
Ukraine	147,389	158,160	10,771	7.3%
Israel	112,827	154,764	41,937	37.2%
Poland	47,604	65,361	17,757	37.3%
Germany	41,217	61,422	20,205	49%

Source: The Ministry of Internal Affairs of Georgia

International Visitor Trips by Borders

Border name	Border with	2017	2018	Change	% Change
Total	↓	6,482,830	7,203,350	720,520	11.1%
Including	↓	↓	↓	↓	↓
Airport Tbilisi	.....	1,133,811	1,402,157	268,346	23.7%
Sarpi	Turkey	1,101,317	1,296,833	195,516	17.8%
Kazbegi	Russia	1,045,488	1,129,490	84,002	8%
Tsiteli Khidi	Azerbaijan	1,018,548	1,121,052	102,504	10.1%
Sadakhlo	Armenia	1,012,111	1,057,581	45,470	4.5%
Airport Batumi	.....	193,699	239,251	45,552	23.5%
Tsodna	Azerbaijan	209,673	207,309	-2,364	-1.1%
Ninotsminda	Armenia	177,753	163,985	-13,768	-7.7%
Kutaisi Airport	.....	112,179	147,009	34,830	31%
Vale	Turkey	146,052	112,763	-33,289	-22.8%
Kartsakhi	Turkey	118,822	106,006	-12,816	-10.8%
Vakhtangisi	Armenia	75,675	71,769	-3,906	-5.2%
Guguti	Armenia	51,895	47,784	-4,111	-7.9%
Gardabani Railway	Azerbaijan	26,195	37,694	11,499	43.9%
Sadakhlo Railway	Armenia	27,180	29,257	2,077	7.6%
Batumi Port	.....	12,953	16,445	3,492	27%
Poti Port	.....	16,876	14,038	-2,838	-16.8%
Kulevi Port	.....	1,857	1,988	131	7.1%
Kartsakhi Railway	Turkey	41	527	486	1,185.4%
Samtatskaro	Azerbaijan	480	337	-143	-29.8%
Akhkerpi	Armenia	225	75	-150	-66.7%

Source: The Ministry of Internal Affairs of Georgia

Travel Behavior of International Visitors

In 2018 the number of international trips to Georgia amounted to 7,203,350. A total of 66% (4,756,820) of trips included at least one overnight stay, which is by definition a tourist trip. 34% were day trips (2,446,530).

The majority of visitors were male (60.3%), and visitors between 31-50 years old were the largest age group (46.3%).

Out of the total number of trips, 72.9% were repeat trips and 27.1% of trips were for the first time. Most of the residents of neighboring countries have traveled to Georgia before.

Duration and Purpose of Travel

International visitor trips were mostly undertaken for holiday, leisure or recreation purposes (42.7%). Other frequently observed purposes included visiting friends or relatives (20.3%), transit (16.5%), business / professional trips (8.7%) shopping (6.9%), and health and medical care (2.7%). Only 2.2% of trips were for other purposes.

The average duration of a trip was 4.2 nights. Visits from neighboring countries tend to last for shorter periods, except for trips from Russia, which averaged 6.3 nights.

Accommodation

During this period, the total number of overnight stays was 30,183,344. The most used form of accommodation was a hotels (39.6%). Slightly more than a quarter of tourists stayed in private home of friend/relative (26.5%). Other types of accommodation were less utilized by international visitors. 12.7% stayed in guesthouse, hostel.

Travel Destinations

52.3% of international trips were to the capital city of Georgia, followed by 29% of trips to Batumi. Other destinations had a lower number of visits. Among the most popular were Marneuli (11.7%) and Mtskheta (9.9%), Other destinations included: Kazbegi (8.9%); Gudauri (4.9%), Signagi (4.8%), Kutaisi (4.6%), Telavi (3.7%) and Borjomi (3.4%).

Expenditure

Total expenditure by international visitors during the estimation period was 7.9 billion GEL, and average expenditure per visit was 1,099 GEL. The largest share of visitors' expenditures was registered on served food and drinks (28.6% of total expenses) and accommodation (23.4% of total expenses). 18.1% of expenditures were made on cultural and entertainment services, and only 13.6% was spent on shopping.

Basic Information

The National Statistics Office of Georgia conducted this research to determine the structure of international trips to Georgia.

Methodology

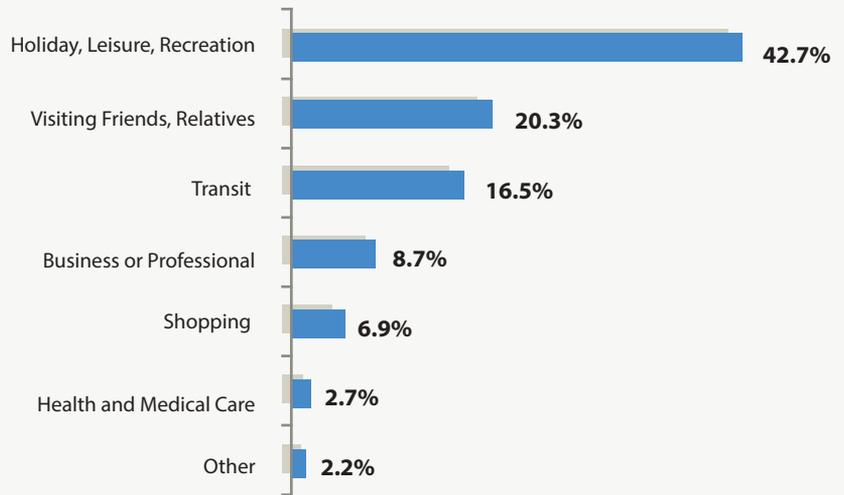
The survey is in a face-to-face format, and a printed questionnaire is used. The data was gathered via a survey using quantitative research techniques based on recommendations of the United Nations World Tourism Organisation. A stratified systematic sample method was applied to selected respondents. Sample size varied across the quarters: I, II and IV quarters - 900 respondents monthly, III quarter - 1,300 respondents monthly. Interviews were conducted with international visitors aged 15 years or older at the moment of leaving Georgia. The interviews took place at the ten biggest checkpoints (airport, land).

Main Published Indicators

Place of permanent residence, purpose and frequency of visit, length of stay, places visited, accommodation, source of information, accompanying persons, means of transport, organization of trip, popular activities and attractions, and satisfaction level.

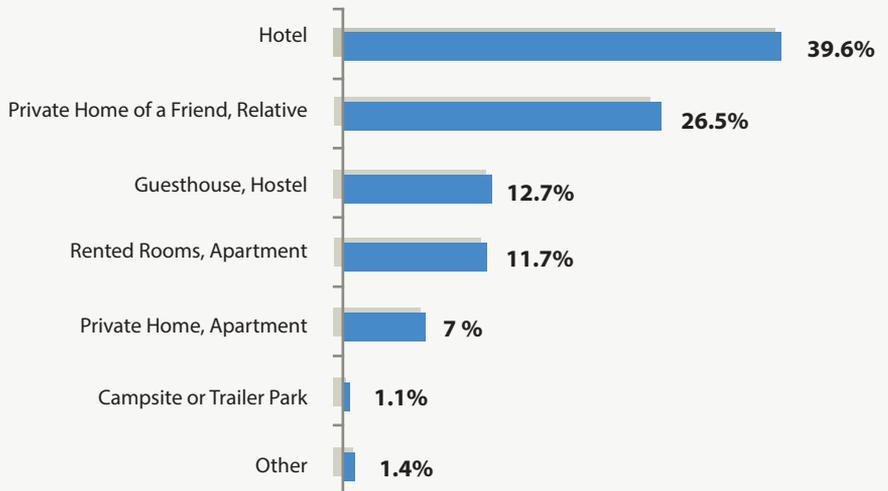
More detailed information can be found at www.gnta.ge and www.geostat.ge.

Main Purpose of Trip



Source: National Statistics Office of Georgia

Nights Spent



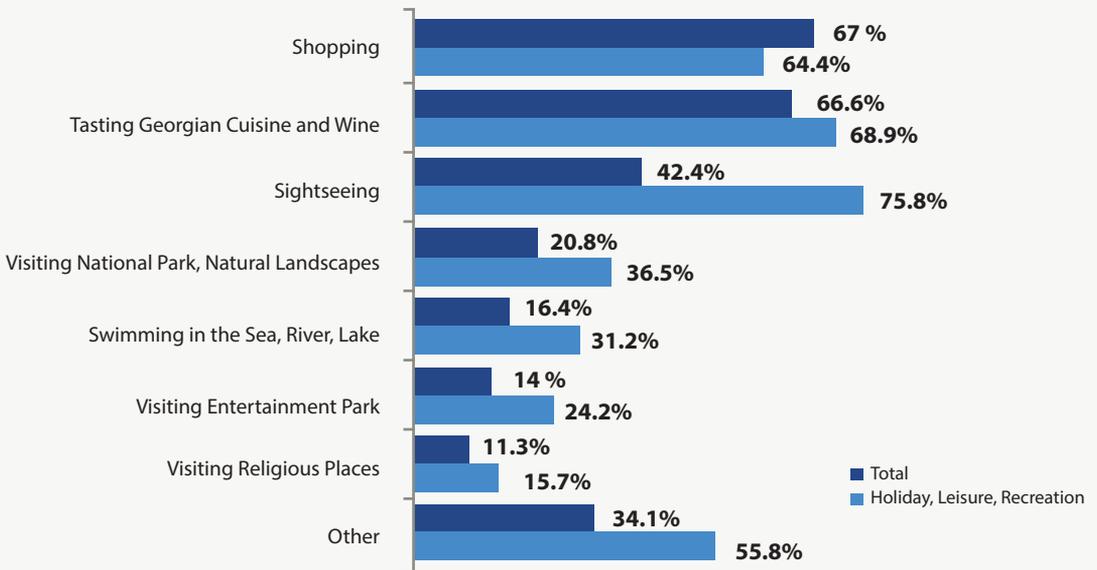
Source: National Statistics Office of Georgia

Average Length of Stay by Country of Residence

Country of Residence	Average Overnights
Russia	6.3
Azerbaijan	2.5
Armenia	1.8
Turkey	1.6

Source: National Statistics Office of Georgia

Popular Tourism Activities



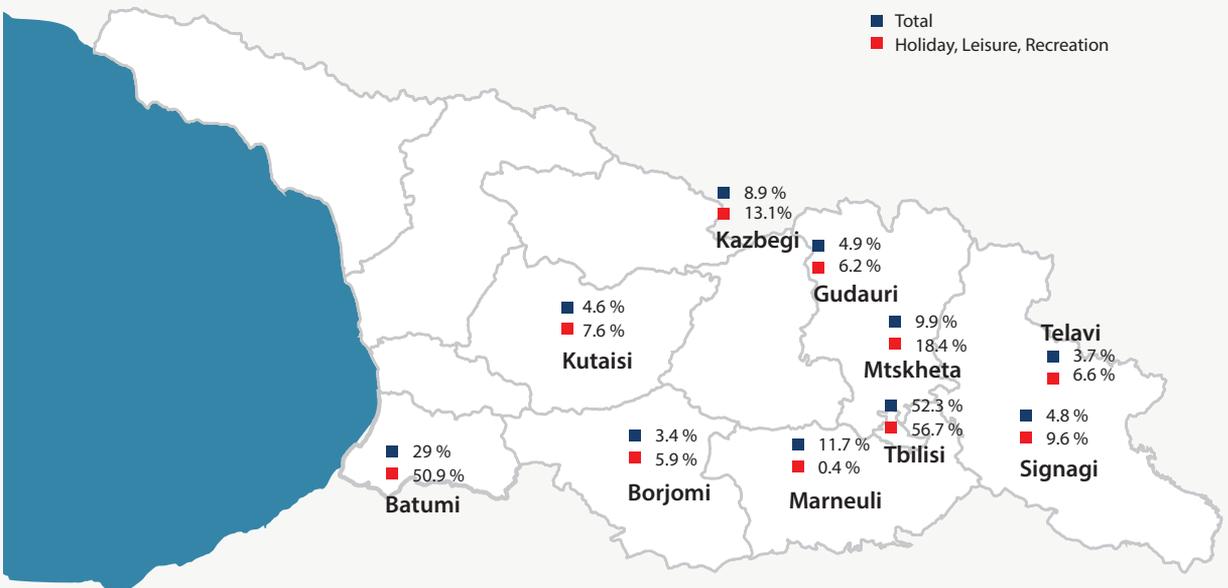
Source: National Statistics Office of Georgia

Expenditure Structure

Components	Total Expenditure (1000 GEL)	Share of Total Expenditure
Served Food and Drinks	2,266,881	28.6%
Accommodation	1,854,514	23.4%
Cultural and Entertainment Services	1,434,705	18.1%
Shopping	1,074,094	13.6%
Local Transport	560,769	7.1%
Other Expenditures	726,540	9.2%

Source: National Statistics Office of Georgia

Most Visited Destinations



Source: National Statistics Office of Georgia

Travel Behavior of the Georgian Residential Population

In 2018, the number of domestic visits within Georgia amounted to 13.1 million. The majority of visits were from Tbilisi (24.7%). Most visits were to large cities.

Duration and Purpose of Travel

Visitors' average trip length was 1.9 nights and varied by place of residence. Visitors from Tbilisi tended to stay for longer periods (3.5 nights, on average), while on average, other visitors spent one or two night away from their usual environment.

The majority of domestic visits (51.8%) were carried out by domestic residents for the purpose of visiting friends or relatives. Shopping was the main reason for 13.3% of visitors. A significant share (10.5%) was for health and medical care. As for leisure and recreation, only 9.1% of visits were made for this purpose. Other frequently observed purposes were: visits to a second home (7.3%) and business and professional purposes (4.4%).

Travel Destinations

About 26.4% of total domestic trips were made to the capital, followed by 9.7% to Batumi and 8.3% to Kutaisi. Among other destinations were: Rustavi (3%), Mtskheta (2%), Gori (1.7%), Telavi (1.4%), and Khashuri (1.4%).

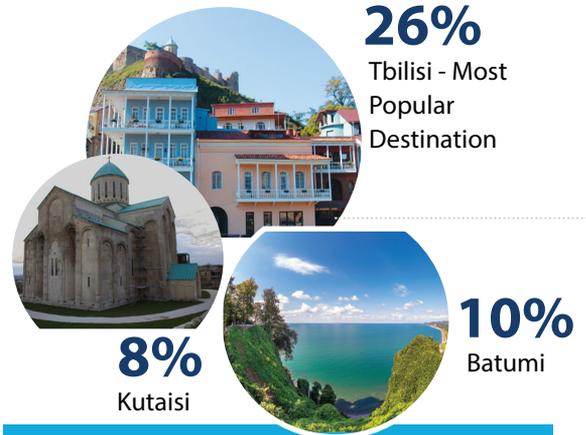
Among the regions, the most popular places were Imereti, Ajara, and Kakheti, with 18.2%, 13.5%, and 7.6% of total domestic visits, respectively.

Accommodation

During this period, the total number of overnight stays was 24.9 million, including the 56.7% 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 number of domestic visitors, 28.1% stayed in their own homes, while 5.4% stayed in a family hotel.

Expenditure

Total expenditure by domestic visitors during the estimation period was 1.7 billion GEL; average expenditure per visit was 132.3 GEL. The largest share of visitors' expenditures, 33.5%, was registered for shopping.



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.

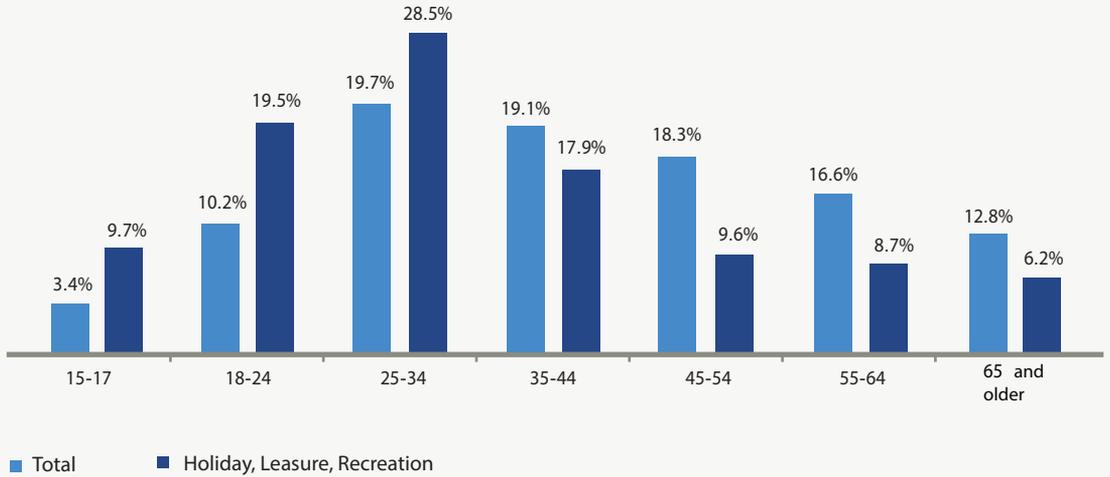
In line with UNWTO Recommendations on Tourism Statistics, domestic tourism refers to trips of residents within Georgia to a location outside of their usual environment.

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.

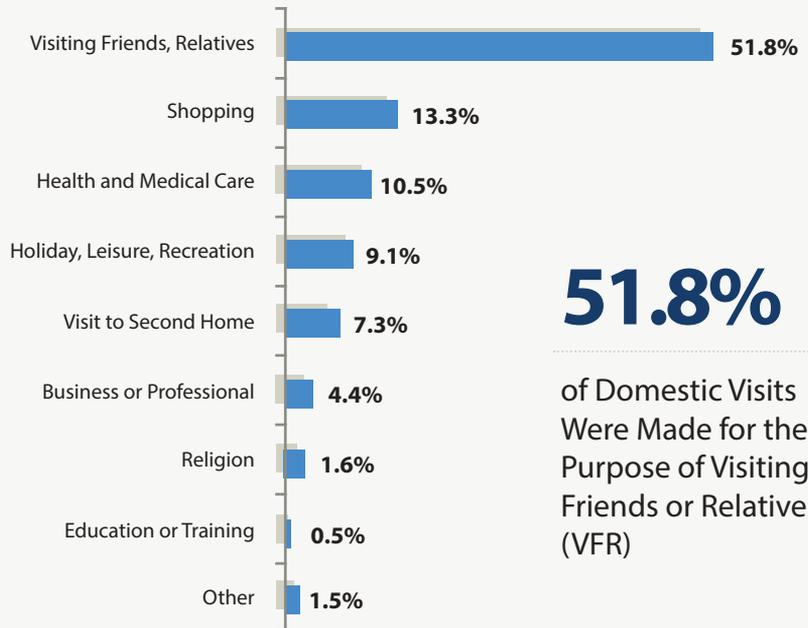
More detailed information can be found at www.gnta.ge and www.geostat.ge

Age Groups



Source: National Statistics Office of Georgia

Main Purpose of Visit

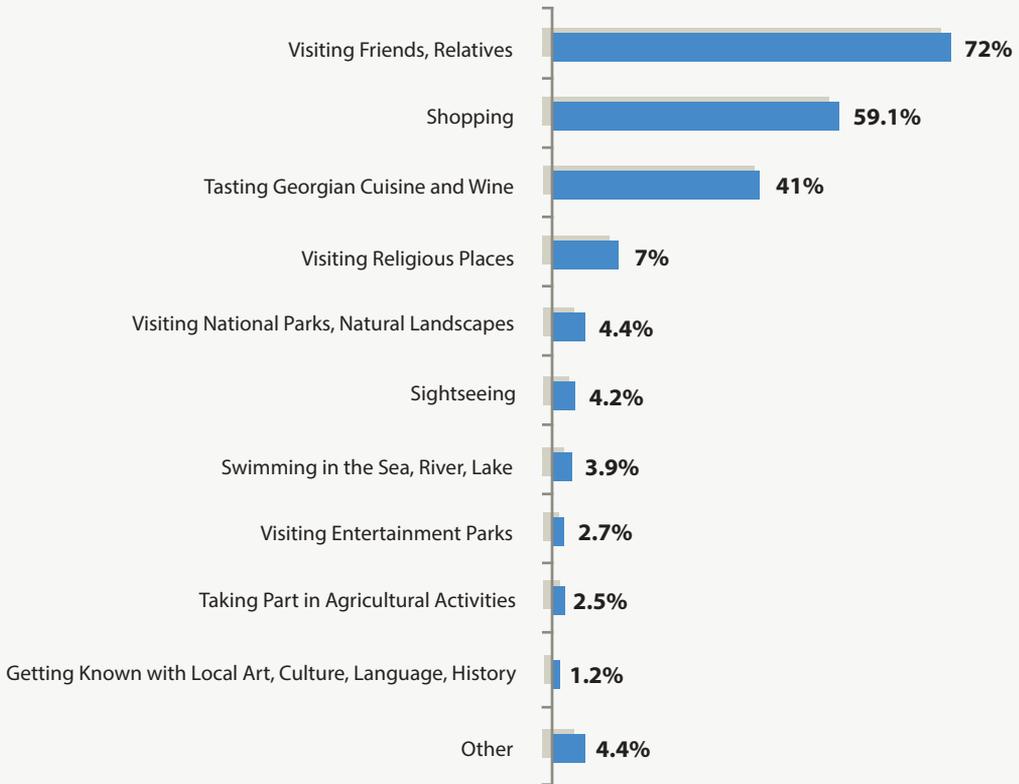


51.8%
of Domestic Visits
Were Made for the
Purpose of Visiting
Friends or Relatives
(VFR)



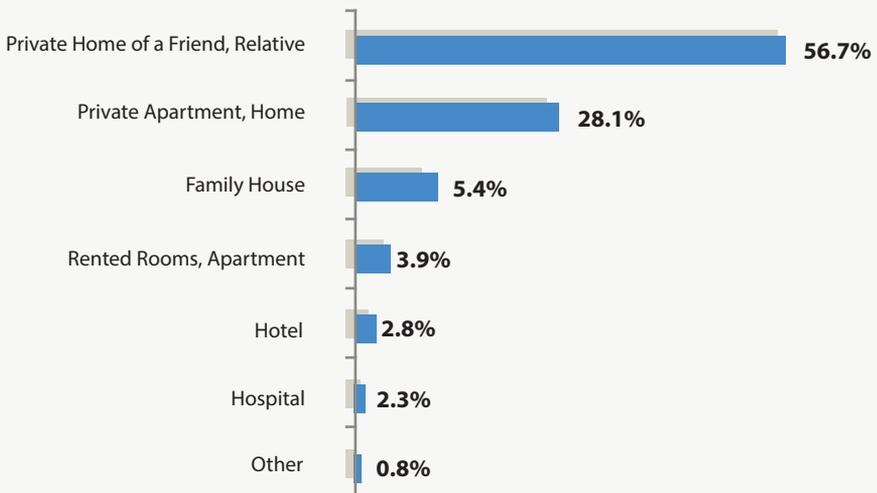
Source: National Statistics Office of Georgia

Popular Tourism Activities



Source: National Statistics Office of Georgia

Nights Spent



Source: National Statistics Office of Georgia

Expenditure Structure

Components	Total Expenditure GEL (x1000)	Share of Total Expenditure
Shopping	852,820	33.5%
Served Food and Drinks	399,439	23%
Local Transport	305,105	17.6%
Accommodation	86,876	5%
Cultural and Entertainment Services	25,696	1.5%
Other Expenditures	338,026	19.4%

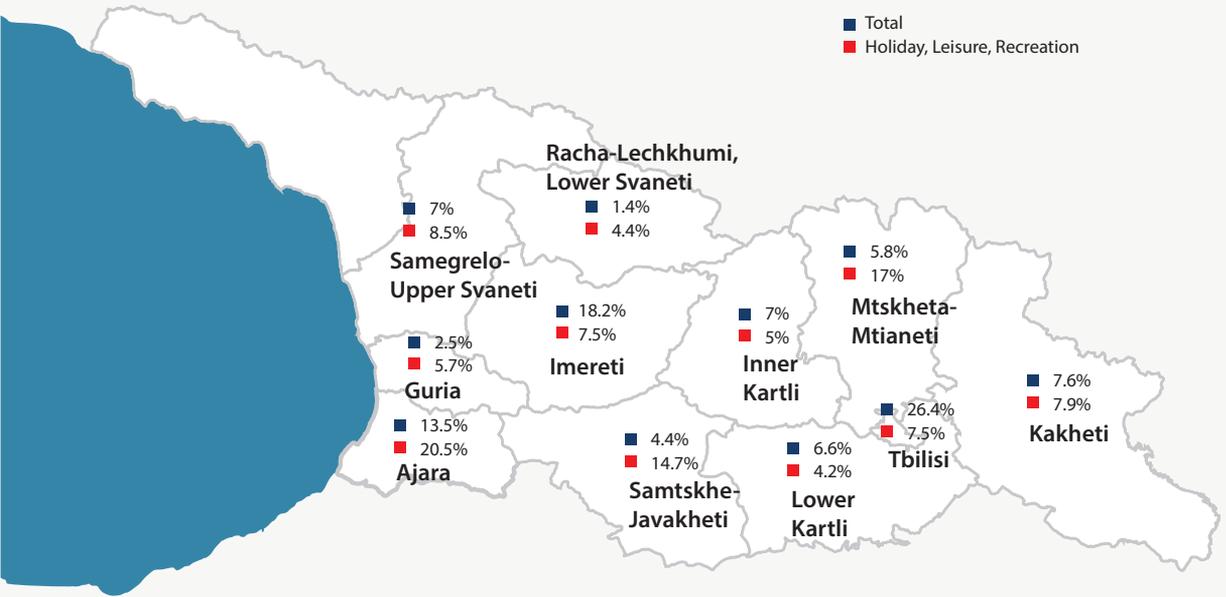
Source: National Statistics Office of Georgia

Duration of Stay According to the Place of Residence

Place of Residence	Average Overnights
Tbilisi	3.5
Guria	2
Imereti, Racha-Lechkhumi, Lower Svaneti	1.7
Samegrelo-Upper Svaneti	1.6
Lower Kartli	1.6
Kakheti	1.5
Ajara	1.1
Samtskhe-Javakheti	1
Inner Kartli	1
Mtskheta-Mtianeti	0.6

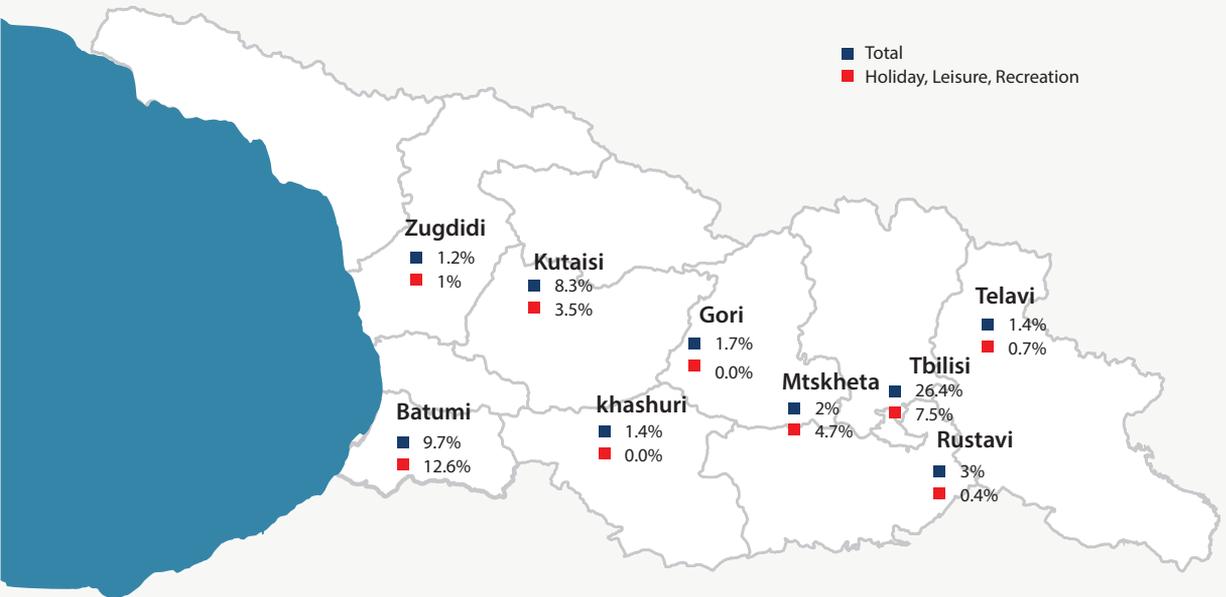
Source: National Statistics Office of Georgia

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 2018 was 2.8 Trillion USD (3.2% of GDP) and it supported 123 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 10.4% of world GDP in 2018. It is responsible for 1 in 10 jobs, 4.4% of total economic investment and 6.5% of world exports (Economic Impact of Travel and Tourism 2019, Annual Update, WTTC).

Tourism - an Invisible Export

The expenditures of foreign guests in Georgia have a huge effect on the national balance of payments. Approximately 71.8% 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 2018, the foreign exchange income from foreign tourism in Georgia amounted to 3.22 billion USD, which is 19.1% higher than in 2017. Foreign exchange expenditures for foreign tourism in Georgia amounted to 0.52 billion USD; compared to 2017 this indicator also increased by 13.2%. In 2018, the balance of foreign tourism in Georgia amounted to 2.7 billion USD, an 20.4% increase over 2017.

In 2018, foreign card operations of international travelers amounted to 2.14 billion GEL, an increase of 3.7%, compared to 2017.

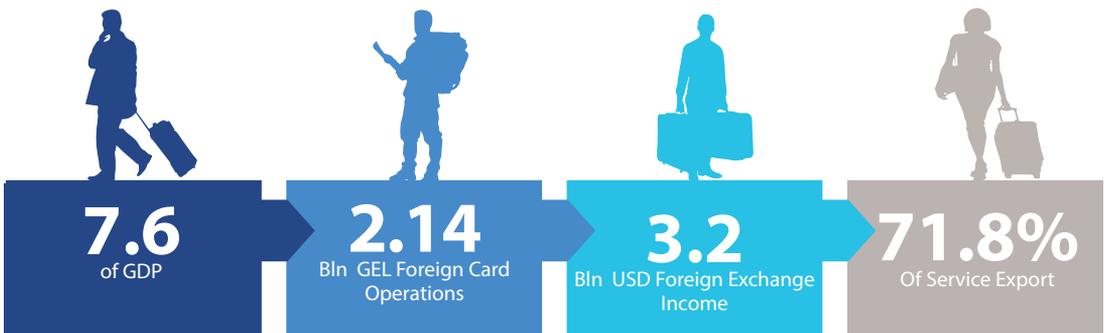
Share of Tourism in the Economy

Between 2017 and 2018, the total value added in the tourism sector increased by 21.5% and reached 2.68 billion GEL due to increased demand. As a result, tourism's gross value added, as a proportion of GDP, increased from 6.8% to 7.6%. The additional value added in the tourism industry in 2018 was mainly driven by travel companies (an increase of 30.1%) passenger traffic (air transport increased by 43.8% and other transport increased by 17.7%), food objects (an increase of 16.3%), and accommodation (an increase of 12.4%).

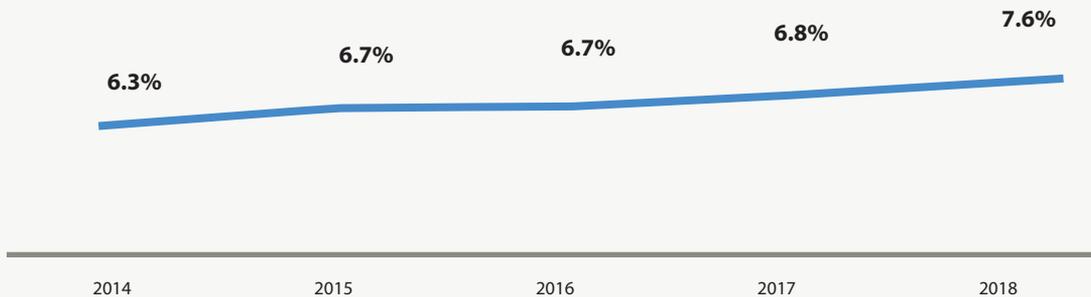
Main published indicators:

- Share of tourism in GDP
- Share of tourism in total output
- Foreign currency income from foreign tourism
- Foreign currency expenses for foreign tourism
- Balance of foreign tourism
- 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, the National Bank of Georgia's website www.nbg.ge and the Georgian National Tourism Administration's website www.gnta.ge.



Share of Tourism in GDP



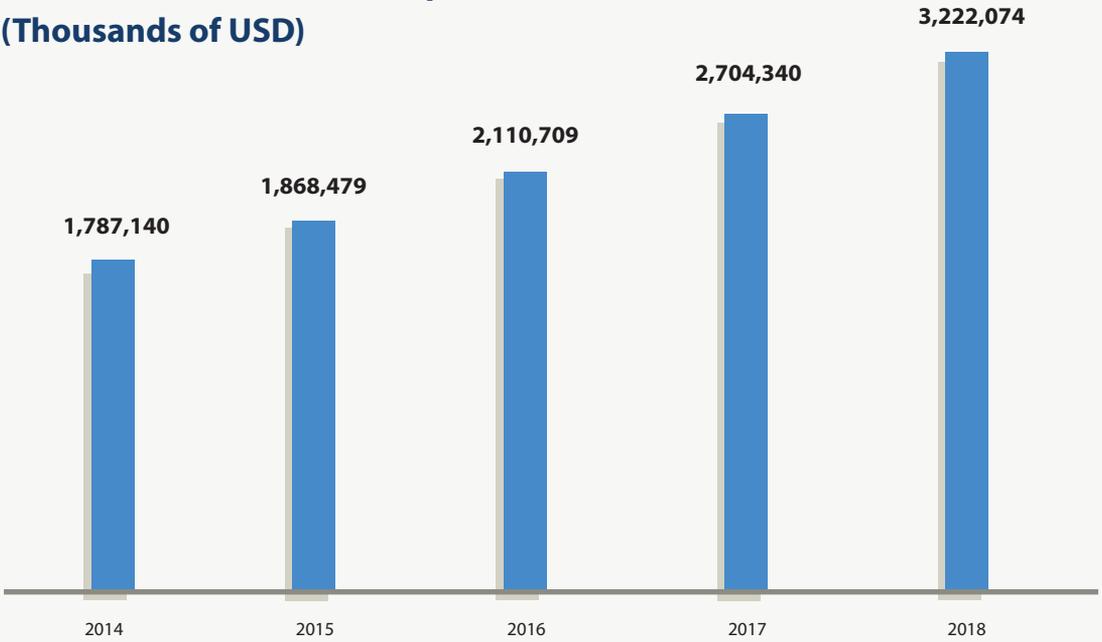
Source: National Statistics Office of Georgia

Tourism Value Added 2015-2018 (Thousands of GEL)

	2015	2016	2017	2018	% Change 2017-2018
Total	1,842,131	1,978,295	2,206,698	2,681,791	21.5%
Including	↓	↓	↓	↓	↓
Accommodation Units	284,380	344,041	429,000	482,277	12.4%
Food Establishments	409,548	478,084	520,518	605,584	16.3%
Transport	444,045	460,005	513,293	625,937	21.9%
Travel Companies	704,158	696,165	743,887	967,993	30.1%

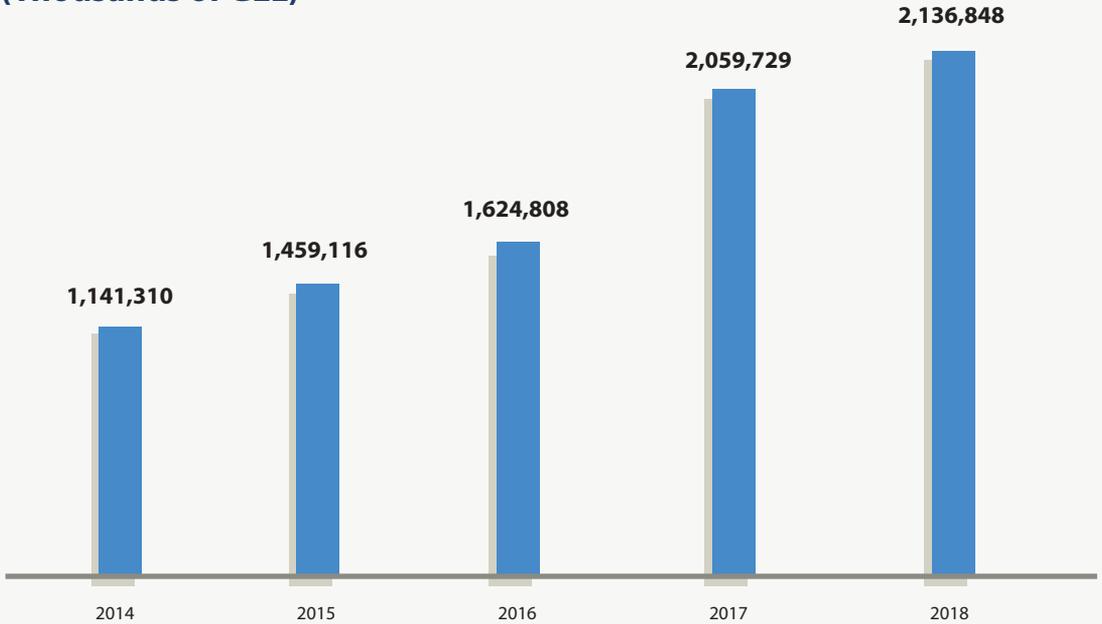
Source: National Statistics Office of Georgia

International Tourism Receipts (Thousands of USD)



Source: National Bank of Georgia

Foreign Card Operations of International Travelers (Thousands of GEL)

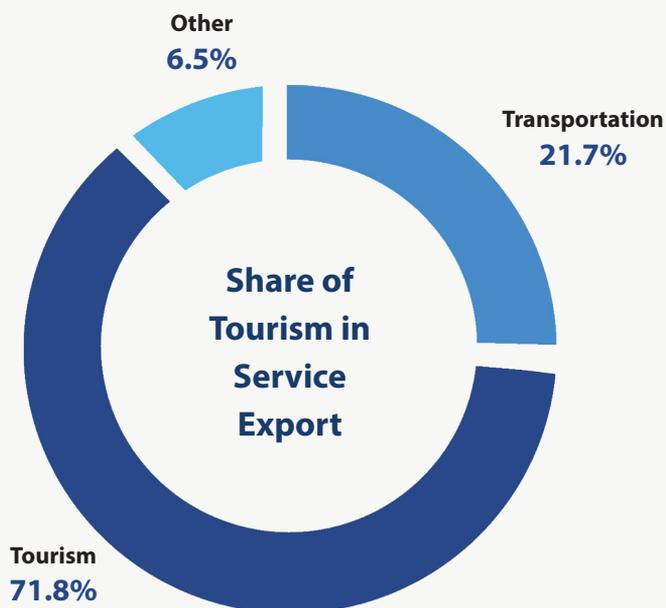


Source: National Bank of Georgia

Foreign Currency Revenues from Incoming Tourism 2015 - 2018 (Thousands of USD)

	2015	2016	2017	2018	% Change 2017 - 2018
Total	1,868,479	2,110,709	2,704,340	3,222,074	19.1%
Including	↓	↓	↓	↓	↓
I Q	305,180	342,590	425,673	550,730	29.4%
II Q	409,470	497,441	629,854	809,969	28.6%
III Q	742,849	813,161	1,078,274	1,210,561	12.3%
IV Q	410,979	457,517	570,538	650,814	14.1%

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, Air Arabia, Flydubai, Pobeda Airlines, Air Baltic, Buta Airways, Salam Air, Flynas, Ukraine International Airlines, and SkyUp Airlines. In 2017, 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 3,000 and 600 passengers/hour, respectively. The capacity of other airports is the following: Kutaisi International Airport - 800, Ambrolauri - 100 and Mestia - 50 passengers/hour.

Airlines

According to the Georgian Civil Aviation Agency (GCAA), Wizz Air Hungary is the dominant air company operating in Georgia and carries the largest number of passengers. In 2018, it served 587,179 (11.9%) passengers. Turkish Airlines is the second most popular airline, with 559,749 (11.3%) passengers, followed by Georgian Airways - 550,831 (11.1%); Ural Airlines - 294,000 (5.9%); FlyDubai - 250,296 (5.1%); Ukraine International Airlines - 223,106 (4.5%); Aeroflot - 194,675 (3.9%); S7 Airlines - 183,392 (3.7%); and Pobeda Airlines - 178,783 (3.6%).

In total, 56 international and two domestic airlines operated in Georgia in 2018. The major airlines operating are Wizz Air, Turkish Airlines, Georgian Airways, Ural Airlines, FlyDubai, Ukraine International Airlines, Aeroflot, S7 Airlines, Pegasus, El Al Israel Airlines, Qatar Airways, Belavia, Yan Air, Azerbaijan

Airlines, QESHM Air, Zagros Airlines, Air Astana, Lufthansa, and LOT Polish Airlines.

One domestic and nine international new companies entered the Georgian market in 2018, including: Georgian Company Myway Airlines, Omani company Salam Air, Saudi Arabian Flynas, Ukrainian company SkyUp Airlines, Romanian company TAROM, Kuwaiti companies Kuwait Airways and Jazeera Airways, Russian company UVT Aero and Iranian company Iran Air. Charter flights were provided by the Georgian Myway Airlines and Jordanian Fly Jordan.

The year 2019 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 2019, the French company Air France is planning to enter the Georgian market and will offer direct flights from Tbilisi to Paris. In addition, Indian company IndiGo and Uzbekistani Company Uzbekistan Airlines will start to operate. Furthermore, the company Air Malta will conduct flights from Tbilisi to Malta once a week.

Following airports included:

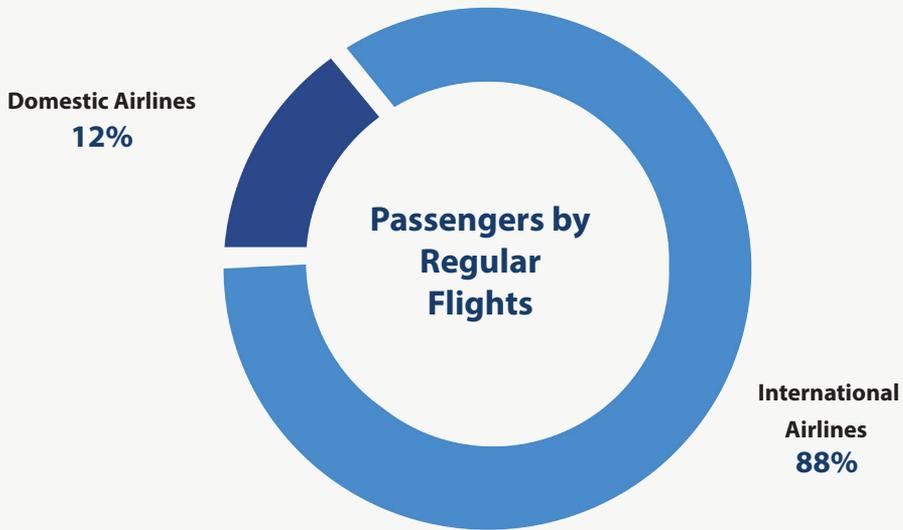
Tbilisi International Airport, Kutaisi David the Builder International Airport, Batumi International Airport, Mestia Queen Tamar Airport, and Ambrolauri Airport.



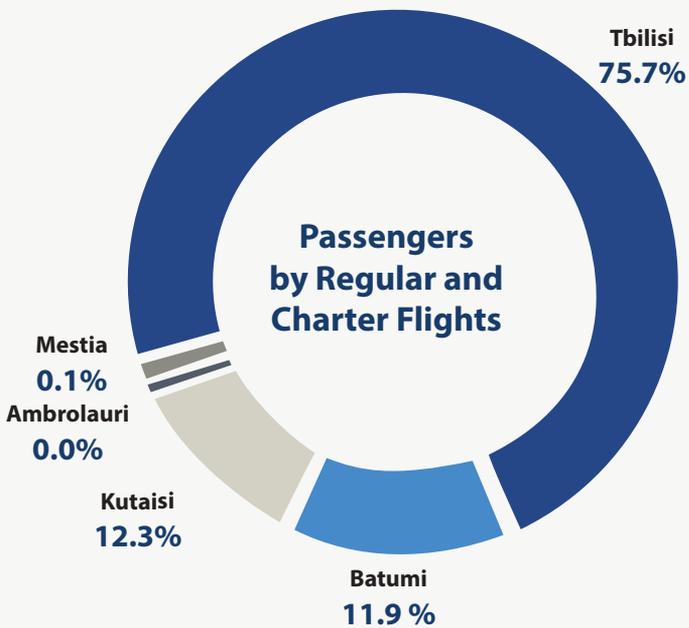
+17.3%
24,606
Flights



+23.5%
5,033,323
Passengers



Source: Georgian Civil Aviation Agency

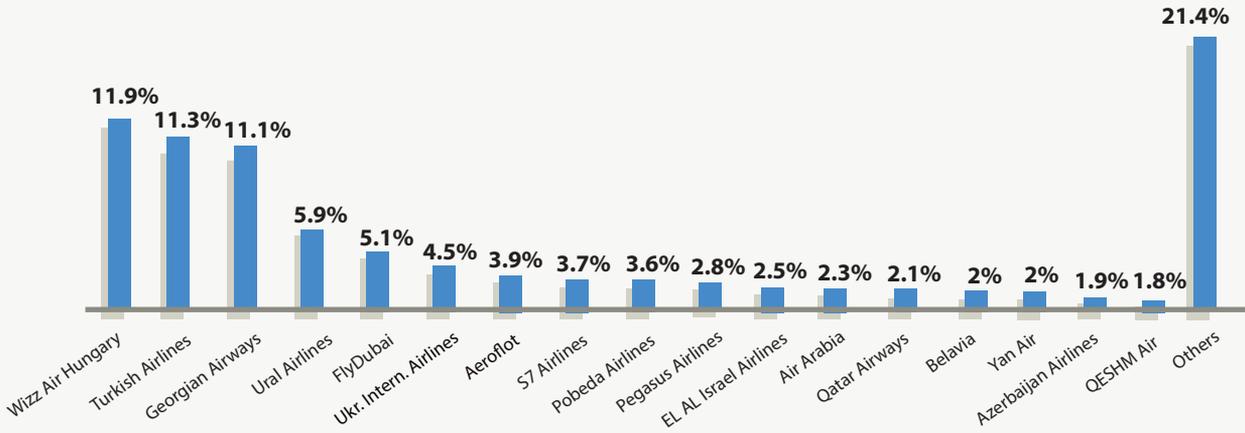


Source: Georgian Civil Aviation Agency

New Airlines in 2018 (Regular)

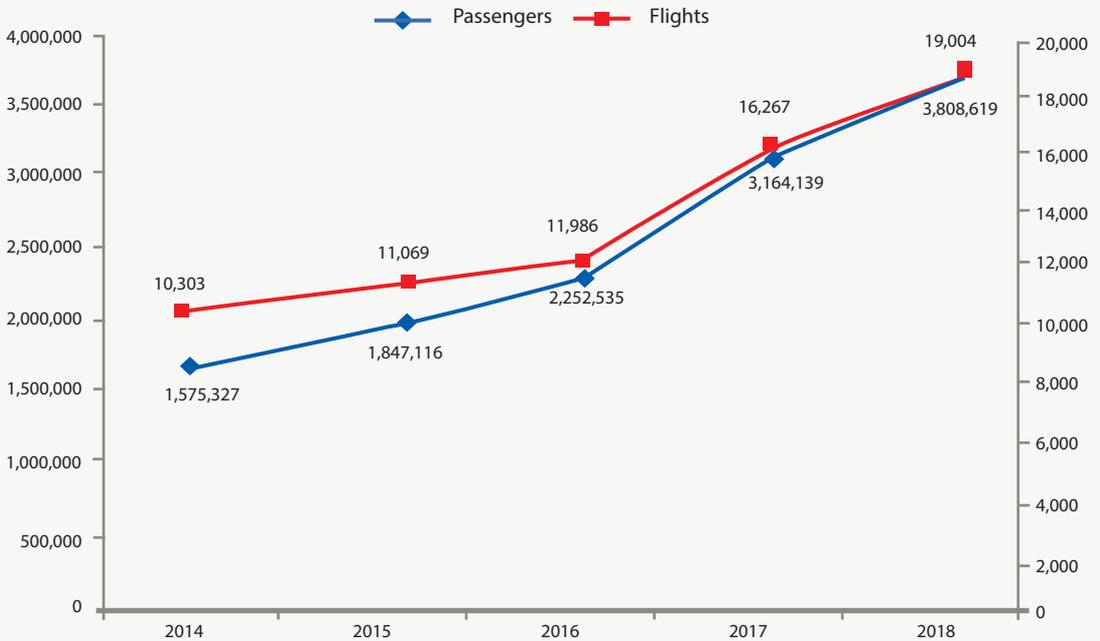
Airline	Route	Frequency
My Airlines	Tbilisi - Budapest - Tbilisi	Twice a Week
	Tbilisi - Rome - Tbilisi	Twice a Week
	Tbilisi - Kharkov - Tbilisi	Twice a Week
	Batumi - Kharkov - Batumi	Twice a Week
	Tbilisi - Kiev - Tbilisi	Three Times a Week
	Tbilisi - Tel Aviv - Tbilisi	Four Times a Week
Salam Air	Tbilisi - Muscat - Tbilisi	Three Times a Week
Flynas	Tbilisi - Riyadh - Tbilisi	Three Times a Week
	Tbilisi - Jeddah - Tbilisi	Three Times a Week
Skyup Airlines	Batumi - Kiev - Batumi	Once a Week
	Tbilisi - Kiev - Tbilisi	Twice a Week
TAROM	Tbilisi - Bucharest - Tbilisi	Twice a Week
Kuwait Airways	Tbilisi - Kuwait - Tbilisi	Twice a Week
Jazeera Airways	Tbilisi - Kuwait - Tbilisi	Three Times a Week
UVT Aero	Tbilisi - Kazan - Tbilisi	Twice a Week
	Batumi - Perm - Batumi	Twice a Week
	Batumi - Ufa - Batumi	Twice a Week
Iran Air	Tbilisi - Tehran - Tbilisi	Four Times a Week
	Tbilisi - Isfahan - Tbilisi	Twice a Week

Share of Airlines



Source: Georgian Civil Aviation Agency

Tbilisi International Airport: Passengers and Flights



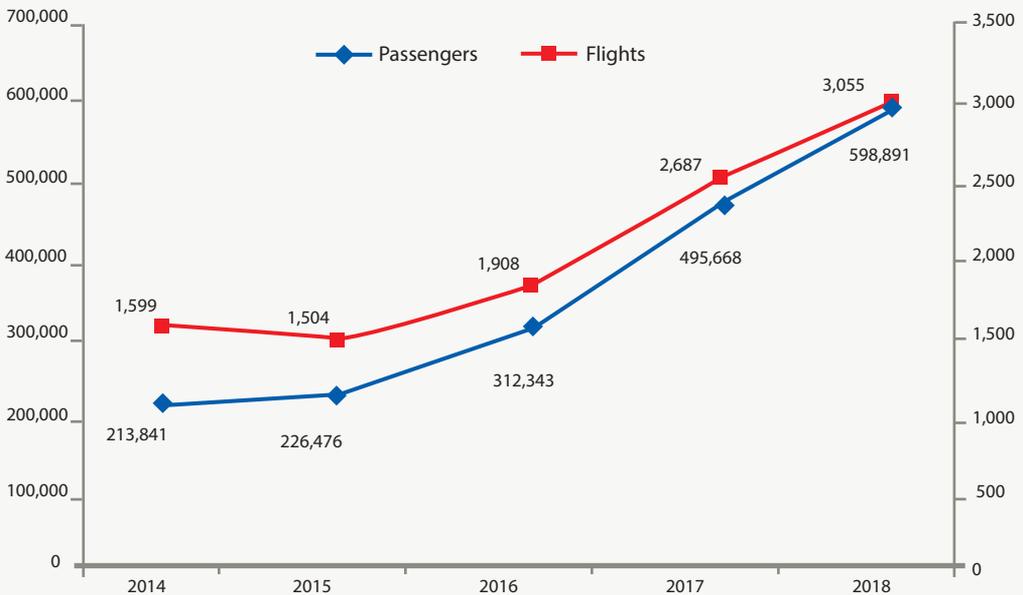
Source: Georgian Civil Aviation Agency

Kutaisi International Airport: Passengers and Flights



Source: Georgian Civil Aviation Agency

Batumi International Airport: Passengers and Flights



Source: Georgian Civil Aviation Agency

New Routes from Georgian Airports in 2018

Airline	Route	Frequency
Georgian Airways	Tbilisi - Barcelona - Tbilisi	Twice a Week
	Tbilisi - Berlin - Tbilisi	Twice a Week
	Tbilisi - Bologna - Tbilisi	Twice a Week
	Tbilisi - Bratislava - Tbilisi	Twice a Week
	Tbilisi - Brussels - Tbilisi	Twice a Week
	Tbilisi - Kazan - Tbilisi	Three Times a Week
	Tbilisi - Koln - Tbilisi	Twice a Week
	Tbilisi - Paris - Tbilisi	Twice a Week
Myway Airlines	Tbilisi - Budapest - Tbilisi	Twice a Week
	Tbilisi - Rome - Tbilisi	Twice a Week
	Tbilisi - Kharkov - Tbilisi	Twice a Week
	Batumi - Kharkov - Batumi	Twice a Week
Pobeda Airlines	Tbilisi - Yekaterinburg - Tbilisi	Twice a Week
	Tbilisi - Kazan - Tbilisi	Twice a Week
	Tbilisi - Perm - Tbilisi	Three Times a Week
	Tbilisi - Petersburg - Tbilisi	Seven Times a Week
	Batumi - Rostov - Batumi	Twice a Week
Ural Airlines	Tbilisi - Krasnodar - Tbilisi	Twice a Week
Yan Air	Batumi - Lvov - Batumi	Twice a Week
	Batumi - Kharkov - Batumi	Twice a Week
Wizz Air	Kutaisi - Athens - Kutaisi	Twice a Week
	Kutaisi - Barcelona - Kutaisi	Three Times a Week
	Kutaisi - Paris - Kutaisi	Three Times a Week
	Kutaisi - Prague - Kutaisi	Twice a Week
	Kutaisi - Riga - Kutaisi	Twice a Week
	Kutaisi - Vienna - Kutaisi	Twice a Week
	Kutaisi - Rome - Kutaisi	Twice a Week
	Kutaisi - Bucharest - Kutaisi	Twice a Week
Kutaisi - Wroclaw - Kutaisi	Twice a Week	
RED WINGS	Kutaisi - Moscow - Kutaisi	Once a Week
Iran Air	Tbilisi - Isfahan - Tbilisi	Twice a Week
Flynas	Tbilisi - Riyadh - Tbilisi	Three Times a Week
	Tbilisi - Jeddah - Tbilisi	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 2,390, with a total of 86,772 beds.

Ajara region has the largest number of beds - 26,019 (30%), followed by Tbilisi with 21,144 beds (24.4%).

Tbilisi boasts several international hotel brands: Radisson Blu Iveria Hotel, Tbilisi Marriott, Courtyard Marriott, Sheraton, Holiday Inn, Citadines Apart Hotel, Best Western Tbilisi, Mercure, Hotels and Preference, The Biltmore Hotel, Ibis Styles Tbilisi Center. In 2018, Best Western Tbilisi City Centre, Ramada Encore, and Moxy by Marriott were added to this list.

A number of brand hotels have also started operating in the regions of Georgia. In Batumi, Best Western Premier Batumi joined the list of existing hotel brands. Furthermore, Best Western Sairme Resorts started to operate in sairme, while premium international brand Hotel Paragraph Resort & Spa Shekvetili, Autograph Collection was opened in Shekvetili.

According to STR Global, the occupancy rate of hotels in Georgia equaled 63.3%; growth compared to the previous year was 2.2%.

There are currently several planned and ongoing hotel construction projects in Georgia. Construction of the following brand hotels is planned in Tbilisi: Hilton Garden Inn, Holiday Inn Express, Park Inn by Radisson, Ramada Encore, Hyatt Regency, Radisson Blu telegraph, Golden Tulip, Marriott Autograph Collection-Panorama freedom Square, Marriott Autograph Collection-Panorama Sololaki, Tabori Ridge Recreation & Golf Resorts, Pullman Hotels & Resort, Wyndham Grand, Hilton Tbilisi. In the regions, the following hotel construction projects are planned: Courtyard by Marriott (Batumi), Babylon Tower (Batumi), Le Meridien (Batumi), Swissotel (Batumi), Twin Tower (Batumi), Wellness Resort & Spa on Mtsvane Kantskhi (Mtsvane Kantskhi), Ramada Resorts (Goderdzi), Radisson Blu Gudauri (Gudauri), Rooms Hotel (Bakuriani), Radisson Blu Resort (Tsinandali), Golden Tulip (Telavi), Holiday Inn (Telavi), Ramada Encore (Kutaisi) and others.

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

In 2018, Tbilisi was the leader in terms of growth of number of beds. More than 120 new accommodation units were introduced on the market in 2018, with more than 6,200 beds. Tbilisi was the main contributor to the stock, supplying 1,500 additional beds (24%), followed by the Guria region with 1,031 beds (16%) and Imereti with 1,027 beds (16%).

The largest number of brand hotels are located in Tbilisi and Batumi. Out of total number of 34 brand hotels, 16 are located in Tbilisi with 4,086 beds, while nine brand hotels with 2,350 beds function in Batumi.

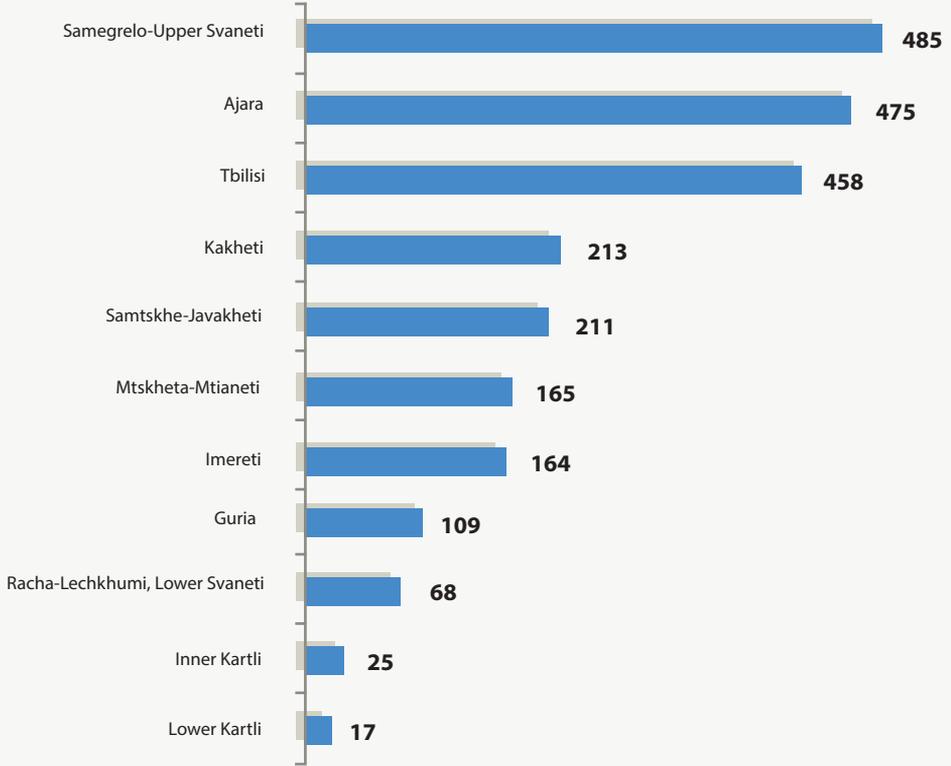
The number of international brand hotels is increasing substantially, especially in the regions. In 2018, six new brand hotels began functioning on the market, and three of them are located in the regions. In Shekvetili, Paragraph Resorts & Spa Shekvetili, Autograph Collection joined the list of existing hotel brands. Best Western expanded its hotel chain in Georgia by introducing new hotels in Kutaisi, Batumi, and Tbilisi. More brand hotels are projected to open in different regional cities in 2019-2020, including: Batumi, Mtsvane Kantskhi, Goderdzi, Gudauri, Bakuriani, Tsinandali, Telavi and Kutaisi.

The number of nights booked in accommodation units through Airbnb is increasing in Georgia (colliers International). The number of properties listed on Airbnb has increased significantly. Properties from Tbilisi grew significantly, by 63%, and reached 10,289, while the monthly average number of booked nights increased by +88% and equaled 3,669. Despite the significant increase in booked nights, occupancy rates are low because of the fast growth in supply.

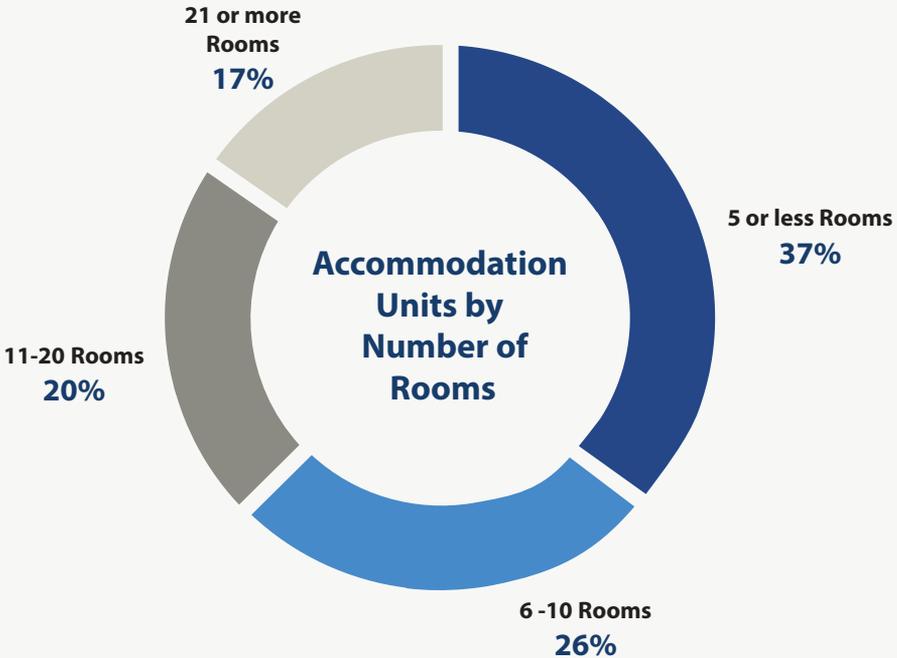
In this report, "brand hotels" are defined as:

Best Western Tbilisi; Citadines Apart'hotel; Courtyard Marriott 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; Borjomi Likani Hotel; Rooms Hotel Kazbegi; Rooms Hotel Tbilisi; Sheraton Batumi Hotel; Sheraton Metechi Palace Hotel, Tbilisi; Tbilisi Marriott Hotels; The Biltmore Hotel Tbilisi; Golden Tulip Borjomi; Ibis Styles Tbilisi centre, Tbilisi; Best Western Kutaisi; Best western Plus Bakuriani, Bakuriani; Best Western Plus Batumi, Batumi; Wyndham Batumi, Batumi; Euphoria Hotel, Batumi; Sky Tower Hotel Batumi; Ramada Encore, Tbilisi; Moxy by Marriot, Tbilisi; Best Western Sairme Resort, Sairme; Best Western Tbilisi city Centre, Tbilisi; Best Western Premier batumi, Batumi; Georgia Palace Hotel & Spa Kobuleti, Kobuleti; Stamba Hotel, Tbilisi; Marriott Autograph Collection-Hotel & Spa Resort, Shekvetili.

Number of Accommodation Units

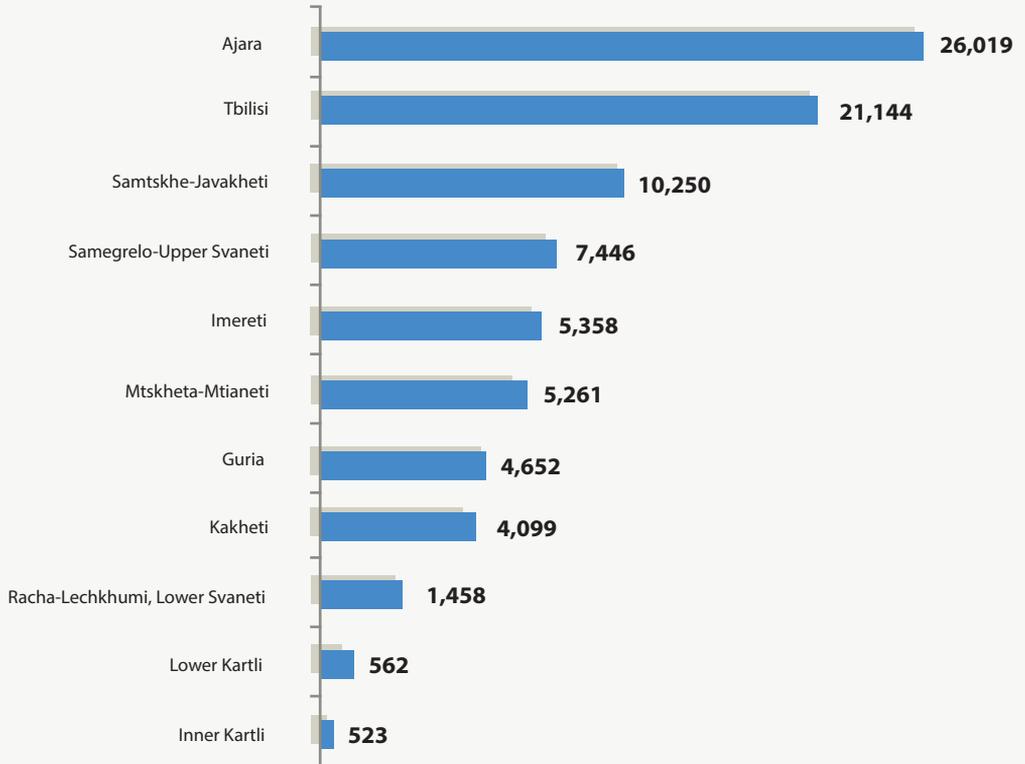


Source: Georgian National Tourism Administration

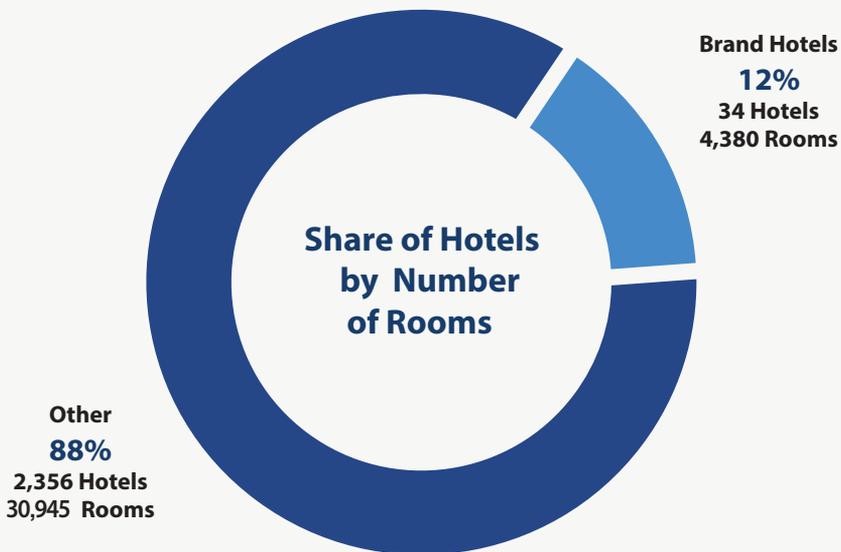


Source: Georgian National Tourism Administration

Bed Capacity by Region

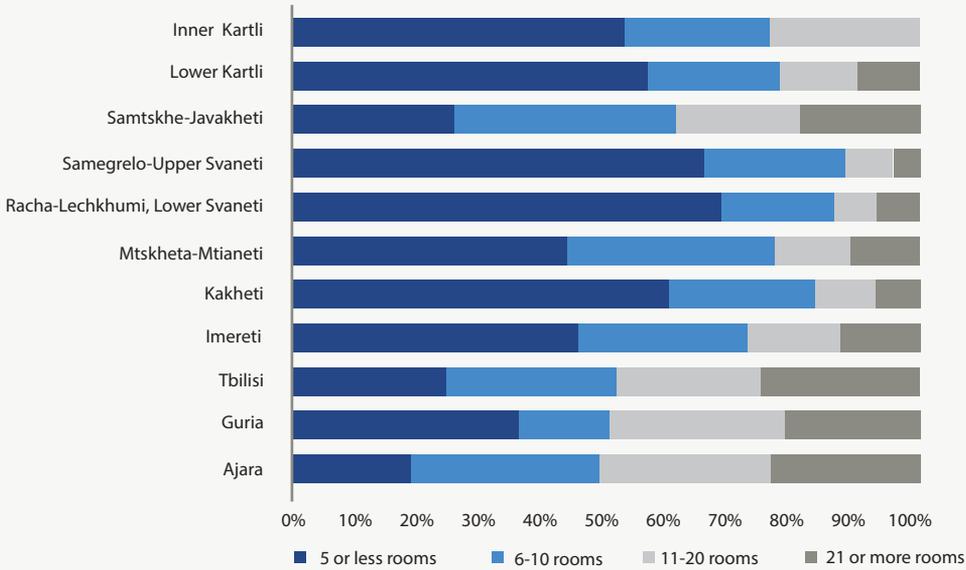


Source: Georgian National Tourism Administration



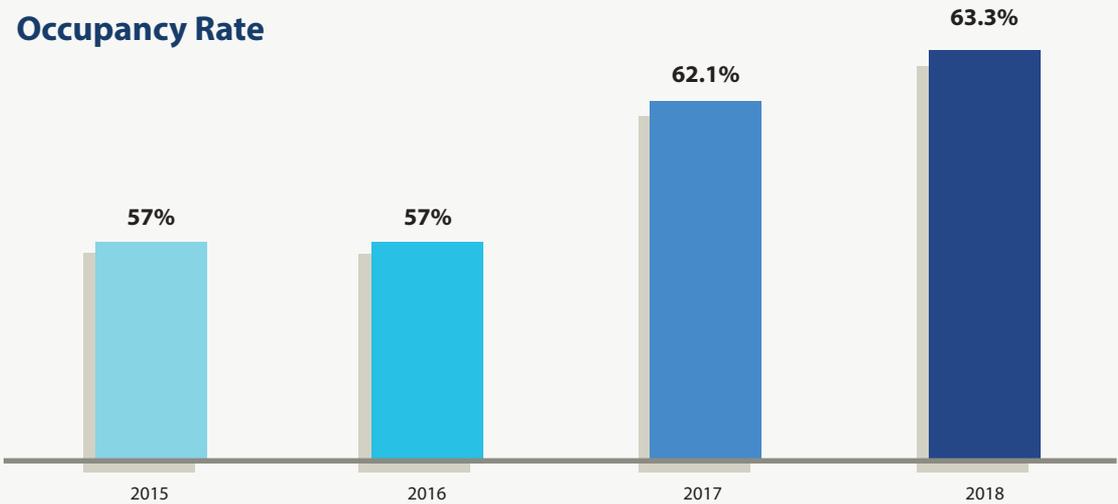
Source: Georgian National Tourism Administration

Accommodation Units by Type and Region



Source: Georgian National Tourism Administration

Occupancy Rate



Source: STR

The occupancy rate is calculated based on the data of the following hotels: Leogrand Hotel, Crowne Plaza Borjomi, Divan Suites Batumi, Ambassadors Tbilisi Hotel, Citadines City Centre Tbilisi, Courtyard Tbilisi, Ibis Styles Tbilisi Center, Mercure Tbilisi Old Town, Hotel Citrus, Marriott Tbilisi Hotel, Millenium The Biltmore Tbilisi, Radisson Blu Iveria Hotel Tbilisi, ROOMS HOTEL Tbilisi, The Shota Hotel, The Grove Design Hotel, Ramada Encore Tbilisi, Ameri Plaza, Hotels & Preference Hualig Tbilisi, Holiday Inn Tbilisi, Wyndham Batumi, Radisson Blu Hotel Batumi, Sheraton Hotel Batumi, Hilton Batumi, Georgia Palace Hotel & Spa, Golden Tulip Borjomi, MOXY Tbilisi, Iota Hotel Tbilisi, Paragraph Resort & Spa Shekvetili Autograph Collection, Best Western Kutaisi.

HOTELS OPENED IN 2018:



RAMADA ENCORE / TBILISI
 AKHASHENI WINE RESORT / GURJAANI
 MOXY BY MARRIOTT / TBILISI
 HOTEL PORTA CAUCASIA KAZBEGI / STEPANTSMINDA-
 TIMBER BOUTIQUE HOTEL / TBILISI
 STAMBA HOTEL / TBILISI
 GREEN TOWER HOTEL / TBILISI
 THE GRAND GLORIA / BATUMI
 TBILISI PARK HOTEL / TBILISI
 BEST WESTERN SAIRME RESORTS / SAIRME
 BEST WESTERN TBILISI CITY CENTRE / TBILISI

STANCIA KAZBEGI / STEPANTSMINDA
 MARRIOTT AUTOGRAPH COLLECTION-HOTEL &
 SPA RESORT / SHEKVETILI
 HOTEL TERRACE KUTAISI / KUTAISI
 BEST WESTERN PREMIER BATUMI / BATUMI
 MOUNT INN KAZBEGI / STEPANTSMINDA
 BRIDGE BOUTIQUE HOTEL TBILISI / TBILISI
 HOTEL BM PLAZA / BAKURIANI
 FOLK BOUTIQUE HOTEL / TBILISI
 KING GORGASALI HOTEL / TBILISI



6,200+
Beds

CONSTRUCTION OF PLANNED ACCOMMODATION UNITS (2019-2021)

ROOMS HOTEL / BATUMI
 HILTON GARDEN INN / TBILISI
 PARK INN BY RADISSON / TBILISI
 WYNDHAM GRAND / TBILISI
 PULLMAN HOTELS & RESORT / TBILISI
 HYATT REGENCY / TBILISI
 HILTON TBILISI / TBILISI
 RADISSON BLU TSINANDALI / TSIINANDALI
 BABYLON TOWER / BATUMI
 RADISSON BLU GUDAURI / GUDAURI
 COURTYARD BY MARRIOTT / BATUMI
 RADISSON BLU TELEGRAPH / TBILISI
 RAMADA ENCORE / TBILISI
 GOLDEN TULIP / TBILISI
 MARRIOTT AUTOGRAPH COLLECTION PANO-
 RAMA FREEDOM SQUARE / TBILISI

MARRIOTT AUTOGRAPH COLLECTION - PANO-
 RAMA SOLOLAKI / TBILISI
 SWISSOTEL / BATUMI
 LE MERIDIEN HOTELS / BATUMI
 PORTA BATUMI TOWER / BATUMI
 TWIN TOWER / BATUMI
 TABORI RIDGE RECREATION & GOLF
 RESORT / TBILISI
 GOLDEN TULIP / TELAVI
 RAMADA RESORTS / GODERDZI
 WELLNESS RESORTS & SPA ON MTSVANE
 KONTSKHI / MTSVANE KONTSKHI
 RAMADA ENCORE / KUTAISI
 HOLIDAY INN / TELAVI
 ROOMS HOTEL / BAKURIANI



27,400+
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 the development of ecotourism. 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 86 different protected areas in Georgia: 14 Strict Nature Reserves, 12 National Parks, 40 Natural Monuments, 19 Managed Natural Reserves, and one Protected Landscape. The total size of all protected areas is 665,664 ha, which comprises 9.55% of the total territory of the country.

The number of visitors registered in protected areas in 2018 was 1,108,503. Compared to the previous year, this was a growth rate of 16.1%. Out of the total number of visitors, 48% were foreigners.

Prometheus Cave and Kazbegi National Park had 185,516 (16.7%) and 174,520 (15.7%) visitors, respectively. These two sites have the highest number of visitors. The share of foreign visitors exceeded Georgians in Prometheus, Okatse, Chachuna, Mtirala, Machakhela, Martvili and Tusheti protected areas. Most foreigners visited Prometheus Cave and Martvili Canyon.

The number of foreign visitors in protected areas was 529,023 in 2018, which compared to the previous year was a growth rate of 28.2%. The majority of international visitors were Russians - 27%, Israelis - 13%, Poles - 8%, Germans - 8% and Ukrainians - 7%.

In 2018, income from tourism services in protected areas was 8,436,125 Gel, a growth rate of 87.3%. Calculated by amount of income, Prometheus Cave was the leader - 3,737,605 GEL, followed by Martvili Canyon - 2,558,970 GEL, Okatse Canyon - 951,108 GEL, and Sataplia - 813,317 GEL.

Basic Information

The reason for designating protected areas is 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 recreational 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.

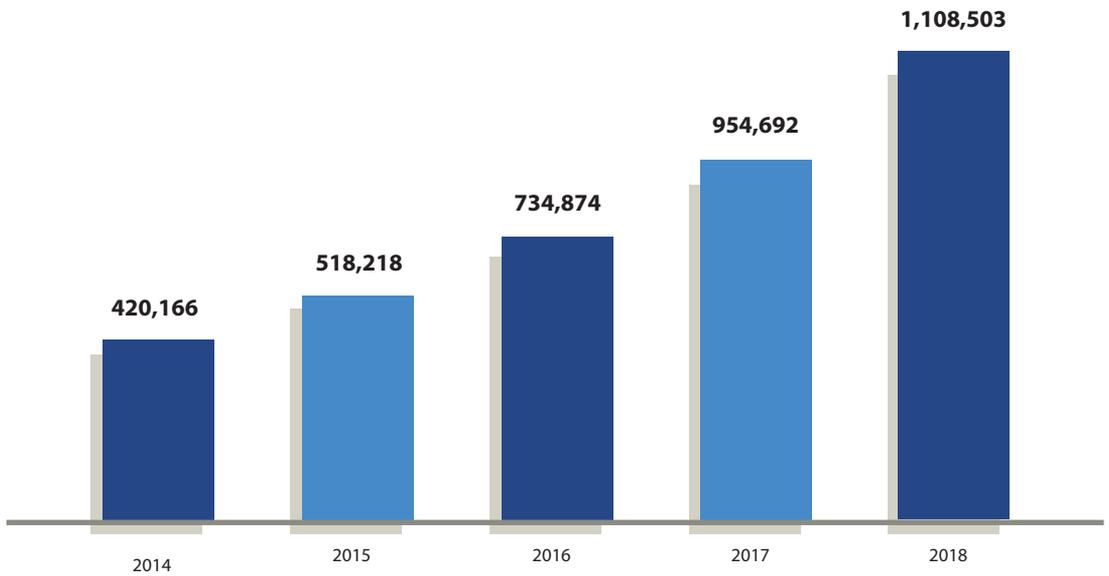
Natural Monument - Protected area promoted mainly for conservation of specific natural features (protection of all small size territories).

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

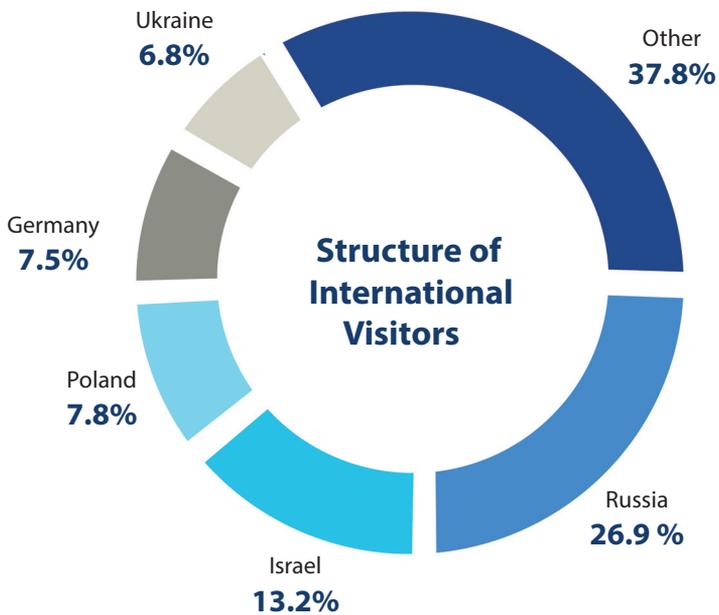
Protected Landscape - Protected area managed mainly for landscape/seascape protection and recreation.

More detailed information is available at: www.apa.gov.ge

Visitors of Protected Areas by Year



Source: Agency of Protected Areas



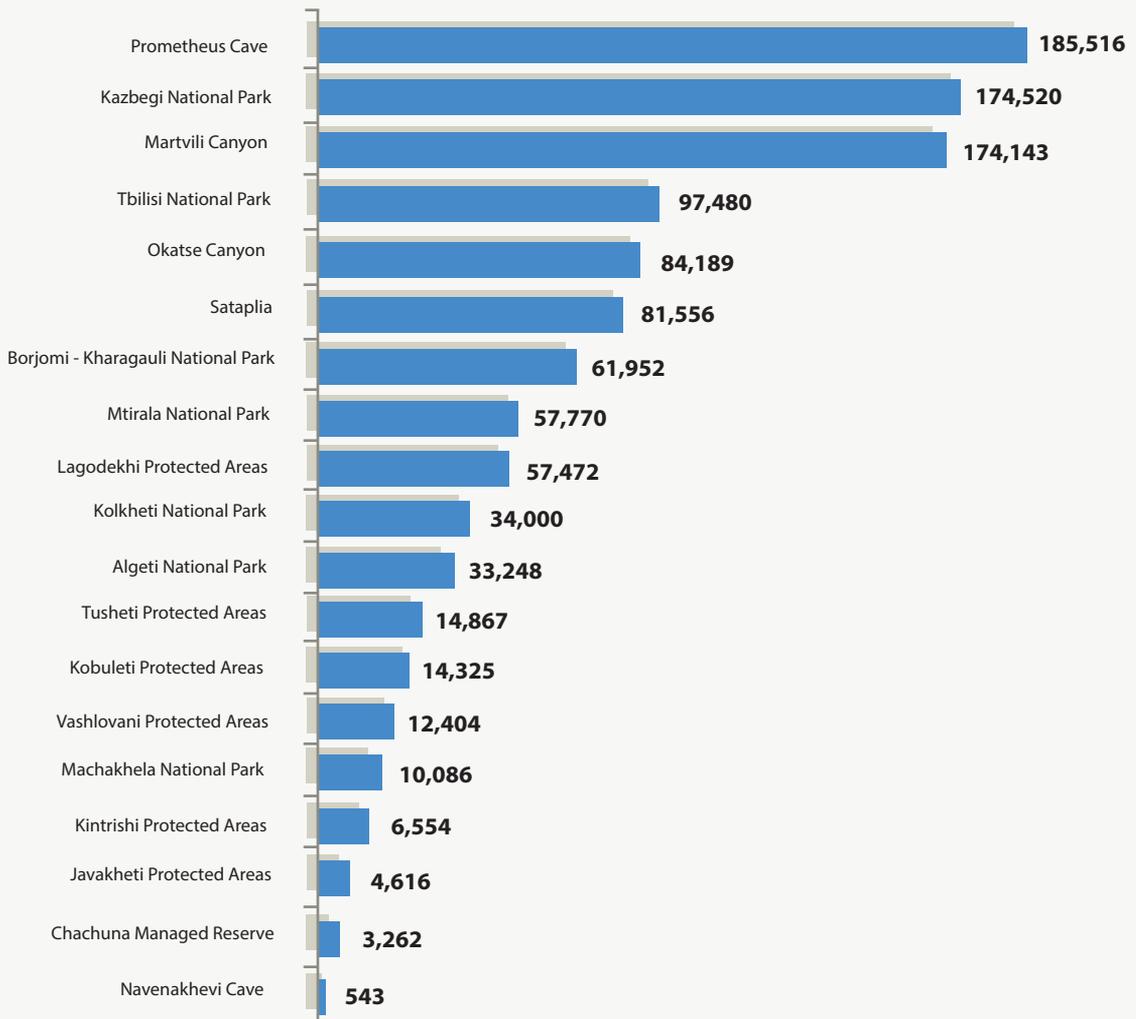
Source: Agency of Protected Areas

Visitors of Protected Areas by Nationalities

	2015	2016	2017	2018	% Change 2017-2018
Total	518,218	734,874	954,692	1,108,503	16.1%
Foreigners	181,329	310,477	412,529	529,023	28.2%
Georgians	336,889	424,397	542,163	579,480	6.9%

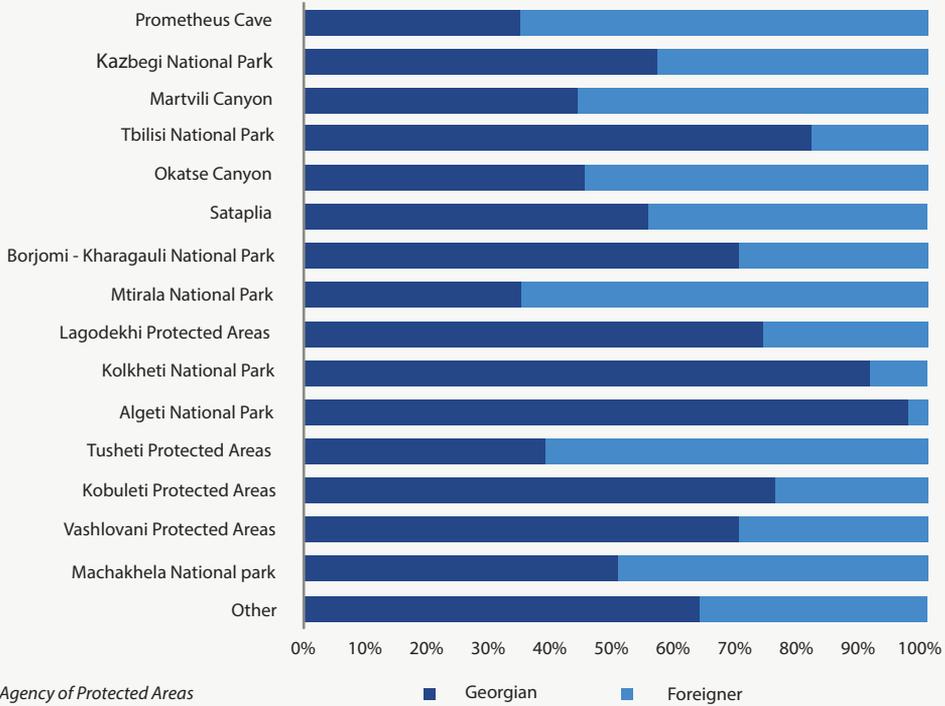
Source: Agency of Protected Areas

Visitors Statistics by Protected Areas

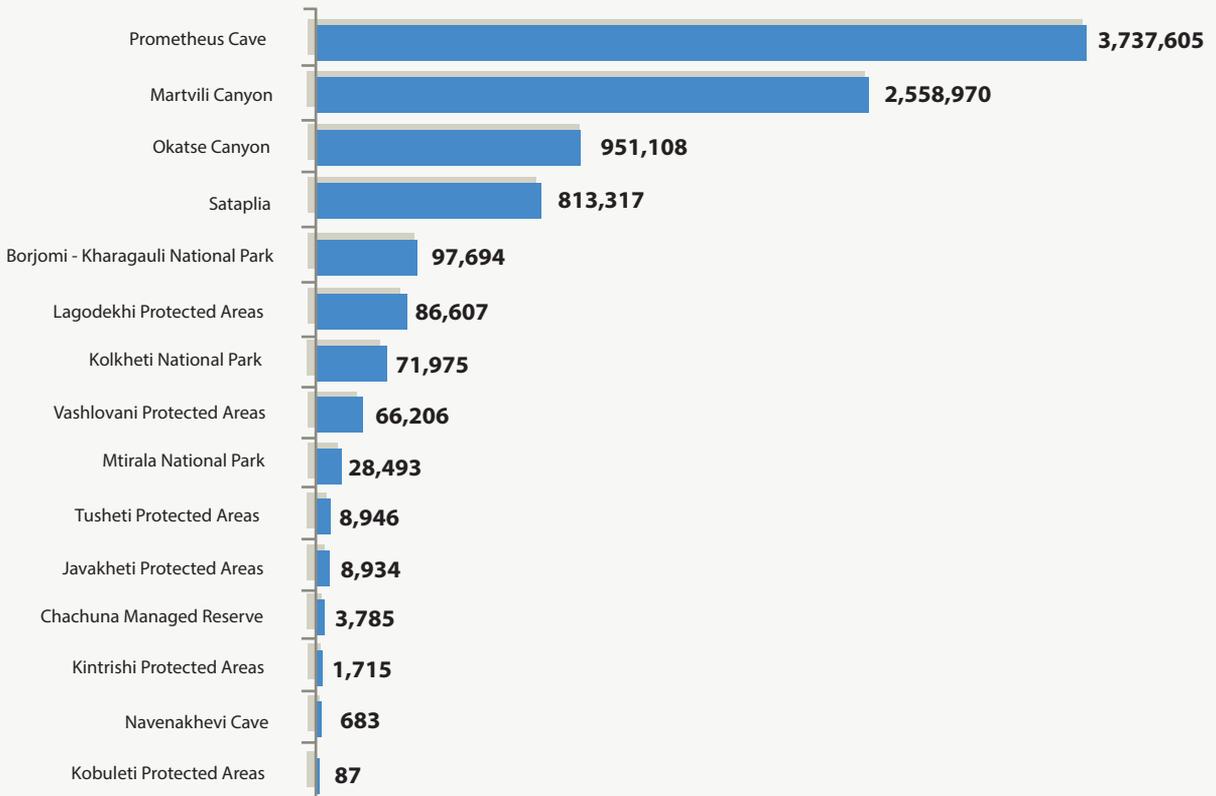


Source: Agency of Protected Areas

Georgian and Foreign Visitors in Protected Areas

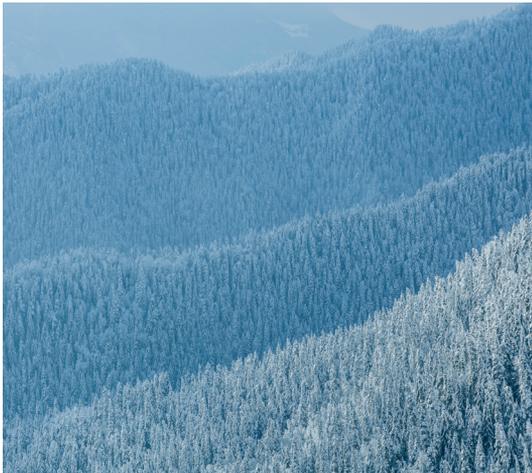


Revenues by Protected Areas (GEL)



Sector Outlook

Despite many obstacles, the Georgian Tourism sector continued to grow in 2018. 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 international visits 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 Georgian Tourism Strategy 2025 is to gain more economic benefits from tourism.



The actions taken by GNTA to increase the number of visits 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 2018, 41 new wine tourism entities were added to the project „Wineroad.“ In total, there are already 165 beneficiaries of this project. Furthermore, a tourist information centre was added in Stepantsminda to the existing 20 in Georgia. In Pankisi Valley, research was conducted to investigate hiking trails, while in Shatili, informational and directional signs were installed.

Another significant issue is 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 more than 1,300 representatives of the industry in the Inner and Lower Kartli, Racha-Lechkhumi, Lower Svaneti, Samegrelo-Upper Svaneti, Mtskheta - Mtianeti, Samtskhe-Javakheti, Kakheti, Guria and Imereti regions. The courses were provided in the following subjects: guide skills, marketing and sales training, hygiene and safety, wine and culinary arts, family hotel management, services for people with disabilities, first aid courses, basic English language courses, and management skills for managers. Furthermore, marketing campaign “With Kind Attitude” was conducted to improve service quality in Georgia.

In addition, for people interested in the tourism sector, a third edition of guidelines for planning inbound tourism was issued in the Georgian language. Furthermore, Wine Route Catalogue was issued in English and Russian languages, which includes contact information of “Wineroad” beneficiaries, their services and the history of wine culture in Georgia.

For the purpose of stimulating domestic tourism, within the framework of the project “Get to know Georgia” 17 press tours were organized in nine regions. Four discount weeks were offered to stimulate tourism: 1. kakheti 2. Ajara 3. SPA & Wellness, 4. All regions. Furthermore, three press tours were organized to market regional tourism resources and products within discount week. Furthermore, several events were conducted in 2018: “Pankisoba 2018” in Akhmeta, International Wine Festival in Gurjaani, “Wira Ski Cross,” “26 may,” Cycling race, adventure Competition in vardzia, Winter Season opening in Gudauri and Mestia, and Media tour “Get to Know Georgia.”

Choosing the right markets is unquestionably an integral part of marketing. Along with maintaining existing markets, the GNTA also has concentrated on tapping into new countries.



კულტურული ღამის ტურები

CULTURAL NIGHT TOURS IN GEORGIA

From June 9 to August 25
 EVERY SATURDAY, AT 20:00.
 Add: Tbilisi, Rike Park (Adjacent to Old Tbilisi).

FREE ENTRANCE



In 2018, the GNTA participated in 24 international and domestic tourism fairs, and hosted 150 press and FAM trips (800 journalists, bloggers and 285 tour operators). As a result, more than 1,000 articles, posts, blogs and 150 TV shows were released. In addition, the Georgian National Tourism Administration conducted an advertising campaigns on the international online platform Tripadvisor.com in 15 countries (Poland, Israel, Italy, Germany, Russia, Turkey, USA, Ukraine, United Kingdom, Sweden, Norway, Denmark, Estonia, Lithuania, Latvia), on Expedia in four countries (USA, United Kingdom, France, Germany), on Lonely Planet (European countries), on National Geographic (European and Middle East countries) and conducted online campaign "Emotions are Georgia" (Youtube, Facebook, Instagram) in 11 countries (Germany, Italy, Israel, Poland, Lithuania, Latvia, Estonia, France, United Kingdom, The Netherlands, Georgia). Presentations were held in different countries (Austria, Czech Republic, Spain, Italy, the Netherlands, France and Germany). Furthermore, advertising campaigns were conducted on global leading channels, including: CNN, Euronews and BBC.

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. With the support of GIZ and the involvement of the Convention and Exhibition Bureau of the Georgian National Tourism Administration, an Austrian company - ENITED - developed the first business events strategy for Georgia.

Georgia held leading position in the region, according to the International Congress and Convention association rankings. In 2018, the Convention and Exhibition Bureau of Georgia with involvement of the International Congress and Convention Association (ICCA) organized "Georgia International Meetings Forum in Partnership with ICCA", for the first time in Tbilisi. During the meeting, several issues were discussed, including: an importance of the existence of a Convention and exhibition center and its impact on economic development, modern challenges and tendencies in the global meeting industry, "Bidding" procedures to attract conferences and the state and strategic plans of the global meeting industry.

Georgia has been successful in international relations as well. Mr Zurab Pololikashvili was elected by the 22nd Session of UNWTO General Assembly as Secretary-General and has officially held this position since 1 January 2018.

In 2018, several events were conducted. Project Check-in Georgia Conducted more than 300 events, including: „MercedesBenz Fashion Week“, „Blues Fest“, „Echowaves“, „4 GB“, „Summer Set“, the musical „Welcome to Georgia“, Exhibition „KOLGA TBILISI PHOTO“, Cultural Nights Tours, Dato Evgenidze's tours in regions, "Pudzeoba", „Artarea Fest“, „Tbilisi Open Air 2018“, „Color Fest“, „Tbilisi Art Fair“ and etc.



Check-in Georgia hosted several music stars, including legendary song writer Ennio Morricone, Composer with Rome's Symphony Orchestra who together opened the new season at the Black Sea Arena. Furthermore, 26 May (Independence Day) was celebrated at Lokomotivi Stadium with superstar James Blunt.

Planned Events in 2019

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 host the 18th Convention of the World Federation of Tourist Guide Associations in Iran by the Georgian Association of Guides, with the support of National Tourism Administration. Georgia competed 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.

Furthermore, the Association of Georgian Doctors will host World Medical Association General Assembly and 213 - th board meeting.



Country	2017	2018	% Change
International Traveler Trips	7,902,509	8,679,544	9.8%
Other (non-tourist)	1,419,679	1,476,194	4.0%
International visitor Trips	6,482,830	7,203,350	11.1%
Including	↓	↓	↓
Central and Eastern Europe	4,136,093	4,586,233	10.9%
Azerbaijan	1,301,556	1,424,610	9.5%
Russia	1,135,057	1,404,757	23.8%
Armenia	1,287,168	1,268,886	-1.4%
Ukraine	169,862	177,058	4.2%
Poland	48,913	66,903	36.8%
Belarus	42,149	60,241	42.9%
Kazakhstan	47,241	58,955	24.8%
Lithuania	14,565	18,693	28.3%
Latvia	11,805	17,653	49.5%
Czech Republic	9,435	13,575	43.9%
Turkmenistan	9,770	10,216	4.6%
Bulgaria	11,022	10,211	-7.4%
Estonia	5,572	10,036	80.1%
Uzbekistan	13,040	8,312	-36.3%
Moldova	8,164	7,548	-7.5%
Other	20,774	28,579	37.6%
Nothern Europe	42,400	54,780	29.2%
United Kingdom	22,392	29,406	31.3%
Sweden	6,034	8,080	33.9%
Norway	3,700	5,219	41.1%
Other	10,274	12,075	17.5%
Southern Europe	49,808	60,589	21.6%
Greece	18,276	19,722	7.9%
Italy	13,425	17,435	29.9%
Spain	7,541	10,996	45.8%
Other	10,566	12,436	17.7%
Western Europe	88,840	128,641	44.8%
Germany	43,090	64,486	49.7%
France	16,053	21,765	35.6%
Netherlands	11,646	18,204	56.3%
Austria	6,998	9,323	33.2%

Belgium	4,972	7,442	49.7%
Switzerland	5,798	7,003	21.3%
Other	283	388	37.1%
East / Med Europe	1,123,698	1,257,355	11.9%
Turkey	1,007,276	1,098,555	9.1%
Israel	115,040	156,922	36.4%
Other	1,382	1,878	35.9%
Caribbean	423	709	67.6%
Central America	246	383	55.7%
North America	38,610	49,238	27.5%
United States of America	33,569	41,863	24.7%
Canada	4,483	6,448	43.8%
Other	558	927	66.1%
South America	3,206	4,858	51.5%
North-East Asia	31,344	53,805	71.7%
China	18,179	31,855	75.2%
Republic of Korea	6,257	13,278	112.2%
Other	6,908	8,672	25.5%
Oceania	5,024	7,343	46.2%
South Asia	336,043	353,490	5.2%
Iran	282,549	291,070	3.0%
Other	53,494	62,420	16.7%
South-East Asia	24,737	29,993	21.2%
Philippines	19,100	21,673	13.5%
Other	5,637	8,320	47.6%
Near/Middle East	131,533	125,773	-4.4%
Saudi Arabia	45,708	51,879	13.5%
Kuwait	11,156	14,939	33.9%
United Arab Emirates	12,106	12,377	2.2%
Jordan	12,680	11,809	-6.9%
Other	49,883	34,769	-30.3%
East Africa	2,789	2,091	-25.0%
West Africa	745	1,015	36.2%
South Africa	1,743	2,392	37.2%
North Africa	2,797	2,655	-5.1%
Central Africa	119	203	70.6%
Other Countries	462,632	481,804	4.1%

Definitions

Agent - A person or company that sells the product on the owner's behalf, including ITOS, wholesalers retail agents.

Business Tourism - Incorporates visitors travelling for conventions, conferences, seminars, workshops, symposiums, incentives, exhibitions and special events.

Business Visitor - A business visitor is a visitor whose main purpose for a tourism trip corresponds to the business and professional category of purpose.

Commission - The fee paid agents for them to market, distribute and sell the product.

Country of Residence - The country of residence of a household is determined according to the centre of predominant economic interest of its members. If a person resides (or intends to reside) for more than one year in a given country and has there his/her centre of economic interest (for example, where the predominant amount of time is spent), he/she is considered as a resident of this country.

Destination - A destination is a geographical area consisting of all the services and infrastructure necessary for the stay of a specific tourist or tourism segment.

Distribution - The channels or places through which a consumer may purchase the product.

Domestic Tourism - Domestic tourism comprises the activities of residents of a given country travelling to and staying in places inside their residential country, but outside their usual environment for not more than 12 consecutive months for leisure, business or other purposes.

Fully Independent Travelers (FIT)- Travelers who plan their own travel arrangements. There are a number of types of FIT including visiting friends and relatives, backpacking and partially packaged travel.

Inbound Tour Operator (ITO) - Country based agent that specializes in developing programs and itineraries for distributors, also known as ground operators and destination management companies (DMC).

Inbound Tourism - International tourist traffic coming into a country. Also referred to as export tourism.

Incentive Travel - Incentive travel is a trip offered as a prize or reward, for top performing employers or sales agents.

Industry - All businesses that are involved in tourism including distribution agents and product suppliers.

International Traveler - An international traveler is someone who moves between different geographic locations for any purpose and any duration. It excludes foreign citizens who are Georgian residents and includes Georgian citizens who are foreign residents.

International Tourism - International tourism comprises inbound tourism and outbound tourism, that is to say, the activities of resident visitors outside the country of reference, either as part of domestic or outbound tourism trips and the activities of non-resident visitors within the country of reference on inbound tourism trips.

International Visitor - An international visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any purpose (business, leisure or other personal purpose) other than to be employed by resident entity in the country or place visited.

Long Haul Travel - International travel to a destination, generally more than 5 hours from the point of origin, i.e. Australia is a long haul destination for travelers from Europe and America.

Meeting and Incentive Planners - Organize and manage all aspects of meetings, incentives and events.

National Tourism - National tourism comprises domestic tourism and outbound tourism, that is to say, the activities of resident visitors within and outside the country of reference, either as part of domestic or outbound tourism trips.

Online Distribution - Using the internet and web portals to distribute or promote the product to consumers.

Operator - The owner and/or manager of the tourism product.

Outbound Tourism - Residents travelling out of their country to an international destination.

Purpose of a Tourism Trip (main) - The main purpose of a tourism trip is defined as the purpose in the absence of which the trip would not have taken place.

Same Day Visitor - A visitor (domestic, inbound or outbound) is classified as a same - day visitor (or excursionist) if his/her trip does not include an overnight stay.

Short Haul Travel - International travel to a destination, generally less than 5 hours from the point of origin, i.e. Australia is a short haul destination for travelers from New Zealand.

Survey - An investigation about the characteristics of a given population by means of collecting data from a sample of that population and estimating their characteristics through the Sample: A subset of a frame where elements are selected based on a process with a known probability of selection.

Travel Distribution System - A global network of independent businesses which allow international consumers to research and book travel.

Tourism Expenditure - Tourism expenditure refers to the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid or reimbursed by others.

Tourism Industries - The tourism industries comprise all establishments for which the principal activity is a tourism characteristic activity. Tourism industries (also referred to as tourism activities) are the activities that typically produce tourism characteristic products. The term tourism industries is equivalent to tourism characteristic activities and the two terms are sometimes used synonymously.

Tourism Sector - The tourism sector, as contemplated in the TSA, is the cluster of production units in different industries that provide consumption goods and services demanded by visitors. Such industries are called tourism industries because visitor acquisition represents such a significant share of their production of these would cease to exist in meaningful quantity.

Tourist - A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay, or as a same - day visitor (or excursionist) otherwise.

Usual Environment - The usual environment of an individual, a key concept in tourism, is defined as the geographical area (though not necessarily a contiguous one) within which an individual conducts his /her regular life routines.

Usual Residence - The Place of usual residence is the geographical place where the enumerated person usually resides.

Visiting Friends and Relatives (VFR) - Visitors whose main purpose is to visit friends and relatives.

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

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