



## Introduction

This report presents basic characteristics of international travel to Georgia for the period of fourth quarter of 2019. The data is provided by National Statistics Office of Georgia.

The sphere of the main interest of the report includes trips for holiday, business, visiting friends and relatives (VFR) purposes, expenditure during the trip and other reasons.

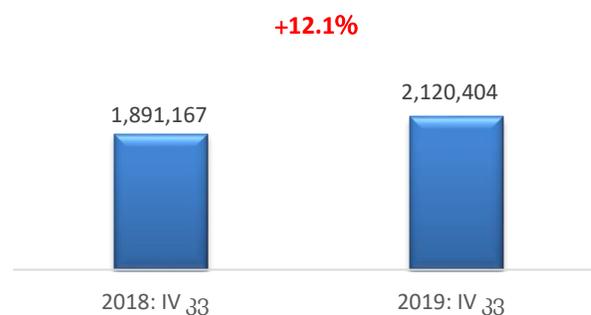
## Significance of International Travel

International travel generates significant economic activity and employment in the world. Its direct contribution to World GDP and employment in 2018 was US\$ 2.6 trillion and it supported 118 million jobs. Taking account of its combined direct, indirect and induced impacts, total economic contribution in 2018 was US\$ 8.3 trillion in GDP, 313 million in jobs; US\$ 882 billion in investment; and US\$ 1.5 trillion in exports. This total contribution represents 10.4% of World GDP in 2018, 1 in 10 jobs, 4.5% of total economy investment and 6.5% of world exports.<sup>1</sup>

## International Traveler Trips

International traveler<sup>2</sup> trips in Georgia have been growing rapidly in recent years. In fourth quarter of 2019, they reached a number of 2,120,404, representing an annual growth rate of 12.1%.

**Figure 1: International Traveler Trips by years**



In fourth quarter of 2019 the number of international visitor<sup>3</sup> trips to Georgia amounted to 1,742,963. The majority of trips conducted by international visitors (excluding nonresident citizens of Georgia), 76.5% (1,333,367) were from neighboring countries. Only 23.5% were from other countries. Armenia was the leader in terms of international visitor trips – 371,904 and occupied first place in terms of share (21.3 %). In terms of the number of trips, the following countries are: Azerbaijan 356,788, Russia 265,584 and Turkey 249,163.

<sup>1</sup> Economic Impact of Travel and Tourism 2018. Annual Update. World Travel and Tourism Council

<sup>2</sup> 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.

<sup>3</sup> 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.

**Table 1: International Visitor Trips Top 5 Countries**

Country	2018 IV Q	2019 IV Q	Change %
Armenia	312,810	371,904	+18.9%
Azerbaijan	329,763	356,788	+8.2%
Russia	295,051	265,584	-10.0%
Turkey	206,804	249,163	+20.5%
Georgia (nonresident)	112,623	117,139	+4.0%

The largest share of international visitor trips in Georgia, 1,363,625 (+18.8%), were by land transport. The busiest border was Sadakhlo (The Armenian border) 331,490 (+21.9%), The Red Bridge (the Azerbaijanian border) 309,811 (+9.7%) and Kazbegi (The Russian border) 275,797 (+28.4%).

**Table 2: International Visitor Trips by Borders**

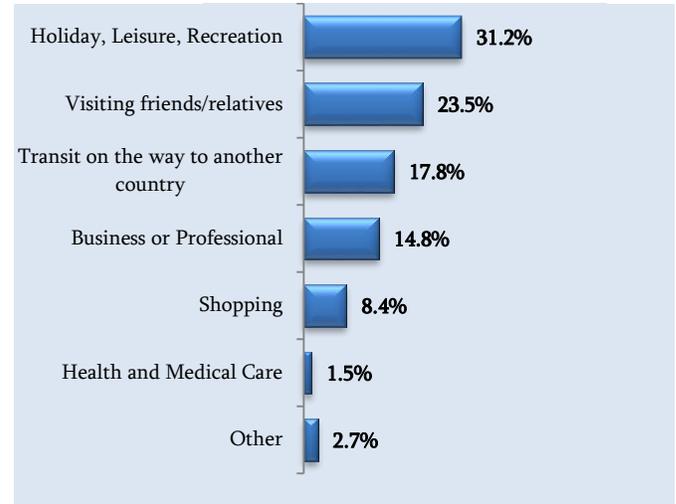
Border Type	2018 IV 33	2019 IV 33	Change %
Land	1,147,498	1,363,625	18.8%
Air	390,020	355,735	-8.8%
Railway	10,551	13,125	24.4%
Sea	8,172	10,478	28.2%

62.5% (1,089,682) of a total trips included at least one over-night stay, which by definition is a tourist trip. 37.5% (653,281) were day trips.

### What are the main purposes of international visitors?

International visitors most often travel for holiday, leisure or recreation purposes (31.2%). Other frequently observed visiting purposes include friends or relatives (23.5%), visiting transit (17.8%), business/professional trips (14.8%) and shopping (8.4%) Only 2.7% of visitors reported other purposes (Figure 3).

**Figure 3: Purpose of Visit**

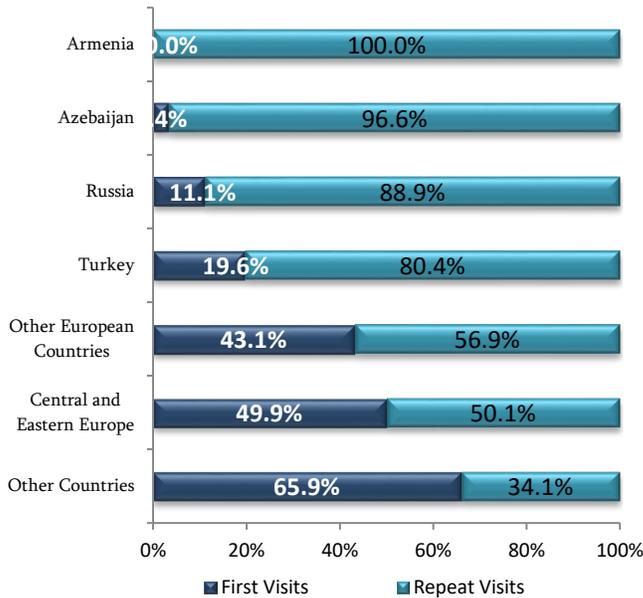


### What is the share of the first time visits?

Out of the total visits, 80.5% were repeat visits and 19.5% traveled to Georgia for the first time. Thus, Georgia had up to 340,540 new visits within the period covered.

Most of the neighboring country residents have traveled to Georgia before. Interestingly, the vast majority of Armenian visits were repeated ones. The highest share of repeat visits after Armenia was observed among the residents of Azerbaijan (96.6%), Russia (88.9%) and Turkey (80.4%). In contrast, for many Europeans or residents of other countries, it was their first visit to Georgia (Central and Eastern Europe – 49.9%; other Europe – 43.1%; other countries – 65.9%).

**Figure 4: Visit Practice**



### How long do they travel for?

Visitors' average duration of stay was 3.5 nights and varied by country of residence. Visitors from neighboring countries tended to stay for short periods except visitors from Russia, who spent on average 5 nights in Georgia (Table 3).

Duration of stay was high for visitors from Europe (Central and Eastern Europe - 5.5 nights, Other Europe 7.8 nights) and other country (7.7 nights) categories.

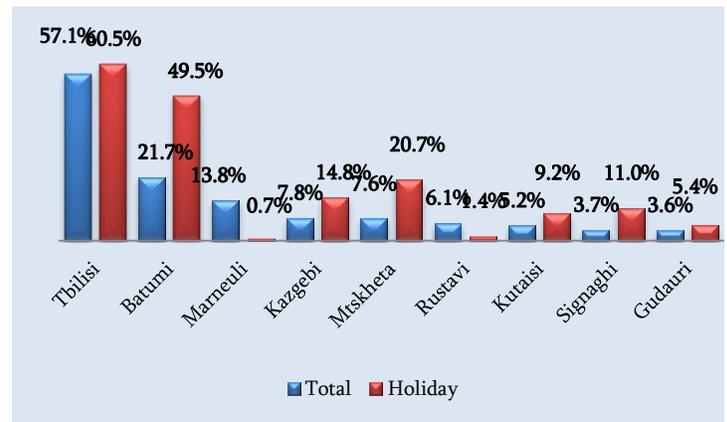
**Table 3: Duration of Stay**

Country of residence	Average Overnights
Russia	5
Turkey	1.7
Azerbaijan	1.2
Armenia	1
Other Europe	7.8
Cent. And East. Europe	5.5
Other Countries	7.7

### What cities and regions do international visitors visit?

57.1% of international trips were made to the capital city of Georgia, followed by 21.7% trips to Batumi. Other destinations were less visited. Among them Kazbegi was the most popular (10.7%). Some other widely visited destinations were the following: Marneuli (13.8%), Kazbegi (7.8%), Mtskheta (7.6%), Rustavi (6.1%), Kutaisi (5.2%), Signaghi (3.7%) and Gudauri (3.6%) (Figure 5).

**Figure 5: Most Visited Destinations**

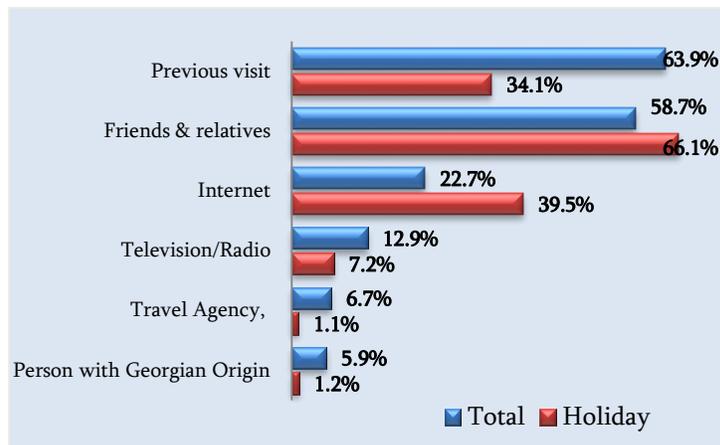


Most international trips on the regional level were made to Tbilisi, seaside Adjara was next with 22%, Lower Kartli 20.7%, Mtskheta-Mtianeti was next with 16.7%. Other regions with significant number of visits were Kakheti 7.3%, Samtskhe-Javakheti 5.7%, and Imereti 5.3%.

### What sources did international visitors use to find information?

Prior to traveling to Georgia, international visitors used various sources for obtaining information. 58.7% learned about the country from their friends or relatives, while 22.7% obtained information from the internet. About a half of the visitors (63.9%) obtained information about the country from their previous visits. As expected, first time visitors used more information sources prior to the trip. “Friends and relatives” was most frequently applied information source 69.2%, while 52.3% obtained information on Georgia from the internet (Figure 6).

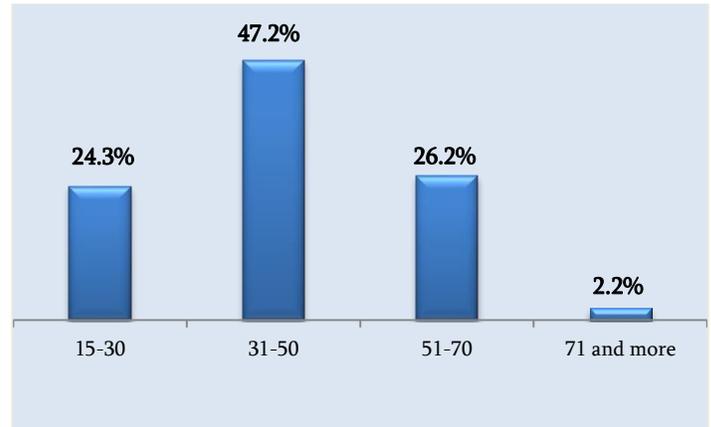
Figure 6: Information Sources



### What is the age and sex profile of international travelers?

The majority of the visitors surveyed were male (male – 66.1%; female – 33.9%). Visitors between 31-50 years old were the largest age group (47.2%) (Figure 7).

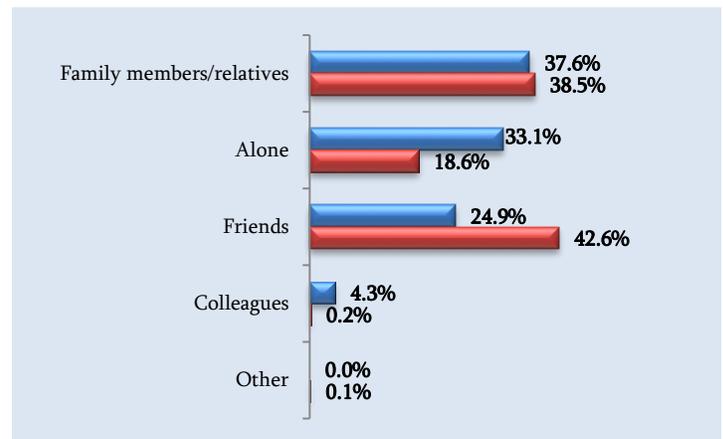
Figure 7: Age Groups



### Who do international visitors travel with?

33.1% of the international trips were made alone to Georgia, while others had at least one companion during the trip. A typical companion is a family member/relative (37.6%). Up to 24.9% of visitors were accompanied by friends (Figure 8).

Figure 8: Persons Accompanying on Trip

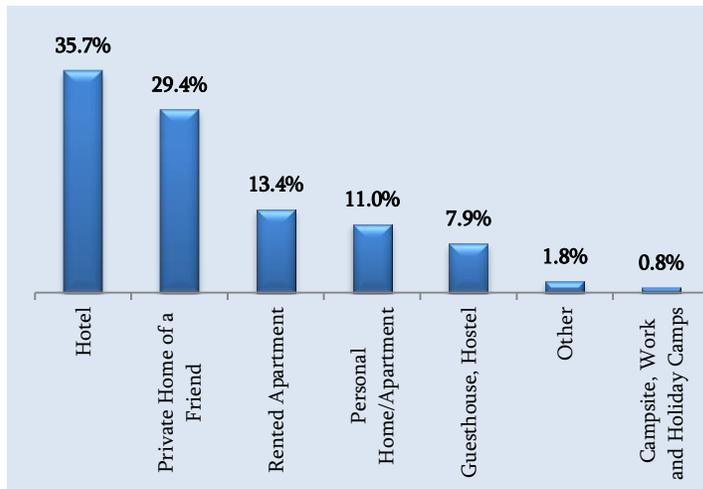


Thus, men visitors (34.9%) were more tended to make trips alone than women visitors (30.4%). It turned out that women visitors visit Georgia with friends and relatives (52.9%).

### What accommodation types do they use?

Total nights spent by international visitors were 6,082,423. The most nights were spent in hotel 35.7%, while 29.4% of the nights were spent in friends and relatives house. Other types of accommodation are less utilized by international visitors (Figure 9).

**Figure 9: Accommodation**



### How much do international travelers spend?

Total expenditure by international visitors during the estimation period was over 3.3 billion GEL and the average expenditure per visit was GEL 1,182.

The largest shares of visitors' expenditure go on served food and drinks (31.1% of total expenses) and accommodation (24.6% of total expenses). 20.7% of expenditure was made on shopping and only 14.3% was spent on Cultural and Entertainment Services. Detailed breakdown of expenditures is given below (Table 4).

**Table 4: Expenditures**

Expenditure Components	Total Expenditure (GEL)	Share %
Shopping	436,511,414	26.0%
Served Food and Drinks	435,499,606	25.9%
Accommodation	324,667,309	19.3%
Cultural and Entertainment Services	284,826,502	17.0%
Domestic Ground Transportation	143,587,848	8.5%
Other Expenditure	54,654,152	3.3%

Visitors from "Other Countries" had the highest spending pattern and spend on average 2,082.9 GEL, followed by residents from "Other Europe" 1,749.7. Among the neighboring countries, the residents of Turkey had the highest average expenditure (1031.2 GEL), while residents of Russia spent only 914.3 GEL on average, and Azerbaijan with 293.1 which is the lowest indicator (Table 5).

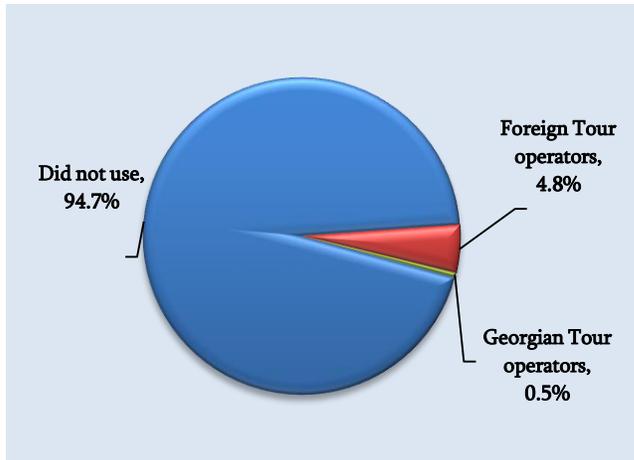
**Table 5: Average Expenditures by Countries**

Country Of Residence	Average Expenditure (GEL)
Armenia	588.4
Azerbaijan	293.1
Turkey	1031.2
Russia	914.3
Central and Eastern Europe	1,440.5
Other Europe	1,749.7
Other Countries	2,082.9

### How many trips are part of tourist package?

Majority of international trips 94.7% were conducted without utilizing tourist package. In total 416.3 million Gel was spent on tourist package expenditures in third quarter of 2019 (Figure 10).

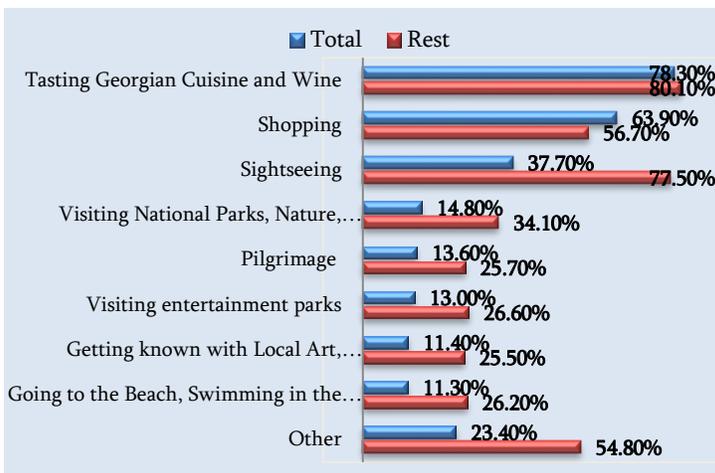
Figure 10: Utilization of a Tourist Package



### What are the popular activities and attractions?

Among the activities undertaken by visitors were: tasting Georgian cuisine and wine (75.7%), Shopping (62.9%) and sightseeing, visiting cultural and historical heritage, museums (51.6%) (Figure 11).

Figure 11: Activities



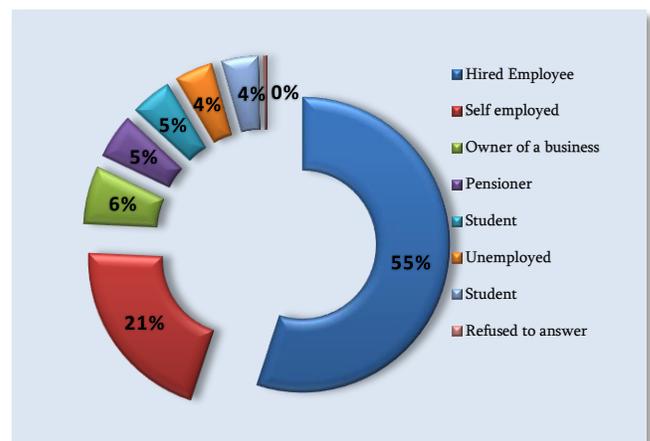
### How satisfied are international visitors?

With regard to general satisfaction, 47.0% was very satisfied with the visit, 45.2% was satisfied and only 0.2% did not answer the question.

### Who are international visitors by occupation?

Majority of international trips were conducted by hired employees (55.1%), followed by self-employed (without employed persons) visitors 20.7% and Owners of a business (which employs others) 6.3% (Figure 12).

Figure 12: International Visits by Occupation



### Methodology

This report is based on the survey data provided by National Statistics Office of Georgia. The data was gathered via a survey using quantitative research techniques based on the recommendations of the United Nations World Tourism Organization.

Interviews were conducted with international visitors aged 15 years or older who were leaving Georgia. The interviews took place at the checkpoints of each type of border (land, airport, railway and port).

**Table 6: Sample Size by Borders**

Type	Border	Sample Size
Airport	Airport Tbilisi	1572
Airport	Airport Batumi	240
Airport	Airport Kutaisi	300
Land	Sarpi	4392
Land	Vale	252
Land	Ninotsminda	432
Land	Sadakhlo	1488
Land	Tsiteli Khidi	1752
Land	Tsodna	504
Land	Kazbegi	1068

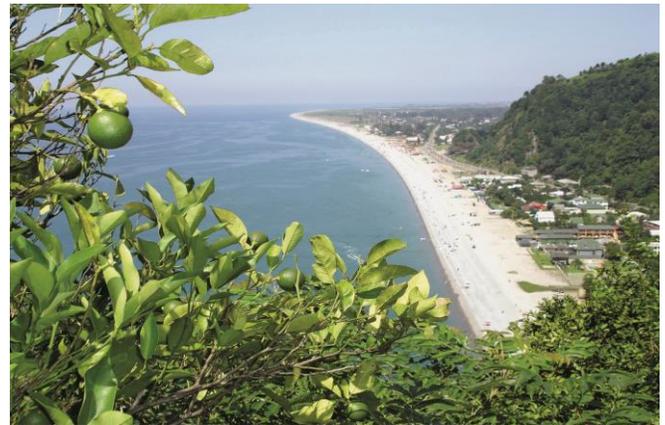
The document reports statistics of data gathered through 12,000 interviews. A stratified systematic sample method was applied to select respondents. The border checkpoint type was taken as a stratification variable. Data of border checkpoints was provided by ministry of internal affairs, information-analytical department. The final sampling unit was a resident of a foreign country aged 15 years and over. A brief description of the methodology is summarized below:

**Table 7: Description of Survey Methodology**

Survey method	Quantitative research
Survey technique	Face to face interviews
Survey areal	Georgia
Target group	International visitors aged 15 years or older
Sample size	12,000 respondents
Duration of interview	10-12 minutes

The data according to the country of residence is analyzed separately for neighboring countries – Turkey, Russia, Azerbaijan and Armenia. Other countries are grouped in three categories – Central and Eastern Europe, Other Europe and Other Countries.

In the category “Central and Eastern Europe” are grouped the following countries: Belarus, Bulgaria, Czech Republic, Estonia, Hungary, Kazakhstan, Kyrgyzstan, Latvia, Lithuania, Moldova, Poland, Romania, Slovakia, Tajikistan, Turkmenistan, Ukraine and Uzbekistan.



In the category “Other Europe” the following countries are grouped: Austria, Belgium, Croatia, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, Malta, Norway, Netherlands, Spain, Sweden, Switzerland and the United Kingdom.

Those counties that were not placed in any of the above mentioned groups, due to small samples, were consequently grouped as “Other” Countries.

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