



2014

GEORGIAN TOURISM IN FIGURES

STRUCTURE &
INDUSTRY DATA

Summary

This yearbook provides information about the activities of the Georgian National Tourism Administration (GNTA) in 2014. It covers statistical data and trends in the tourism sector, the activities undertaken by the GNTA to promote tourism and the standing of Georgia on international tourism indices.

In 2010, the Georgian National Tourism Administration was established as 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; improving visitors' experiences and maximizing their expenditure to significantly contribute to the national economy; and effective cooperation with strategic partners.

From the statistical viewpoint, the performance of the tourism industry in Georgia in 2014 can be characterized as a period of further growth. In 2014, the number of international arrivals reached its historical peak of 5,515,559 and for the second time in history the five million mark was surpassed.

Domestic and international tourism are important factors in the Georgian economy. The expenditures of foreign visitors to Georgia has a significant effect on the balance of payments. Approximately 59% of Georgia's service export revenue comes from tourism. Revenues from international tourism receipts demonstrated an increasing trend and reached 1.79 bln USD in 2014. The share of tourism in total GDP was 6%.

In 2014, there were a total of 1,332 accommodation units registered in the GNTA database, comprising 19,910 rooms with 47,012 beds. The classification of accommodation units by number of rooms

showed that accommodation with five and fewer rooms was the largest category—with 447 such units (representing 34% of the total).

National Geographic Traveler magazine included Georgia in its list featuring 50 of the world's best guided trips. The Georgian tour was selected due to offering an authentic travel experience connected with food, wine and culture. The list placed Georgia amongst a number of top tourist destinations: France, Italy, Portugal, Scotland, Sweden, Switzerland and Denmark. In addition, in a number of international rankings Georgia ranks among the top 10 most secure countries for travel. Georgia was also successful in international relations and hosted the 4th UNWTO Silk Road meeting.

The outlook for the tourism industry is highly optimistic. It is forecast that the sector will create more jobs and generate more income in the years to come. The number of arrivals to Georgia is expected to keep increasing thanks to various steps taken by both the government in general and the Georgian National Tourism Administration in particular.

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

In 2014, the Georgian National Tourism Administration participated in 19 international tourism fairs, conducted marketing campaigns on nine target markets and hosted 46 press and fam trips.

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

International Arrivals

International arrivals to Georgia have been growing rapidly over recent years. In 2014, these reached the record number of 5,515,559, representing annual growth of 2%. The highest growth rate to date was registered in 2012, when the number of international arrivals increased by 57%.

The border crossing registration procedure allows identification of different types of arrivals. Out of the total number of visits, 40.4% lasted longer than 24 hours, 39.4% were same day visits and 20.2% were for the purpose of transit.

The average length of visits increased from 4 to 4.3 days.

The most popular season among international travelers is summer. During this period, the number of international arrivals equaled 1,902,881 (June: 454,347; July: 673,552; August: 774,982), which accounted for 35% of all international arrivals.

The majority of all arrivals, 88% (4,863,165), were from neighboring countries. Only 12% arrived from other countries.

Turkey was the annual leader in terms of the number of international arrivals with 1,442,695 arrivals (an annual decrease of 10%). Azerbaijan occupies first place in terms of the growth of international arrivals (+207,357), with the highest growth rates registered in July (+38,581) and August (+39,800). There was also a significant growth of international arrivals from Russia (+44,225), Armenia (+33,797) and Ukraine (+16,724). This growth was primarily a result of new direct flights, press trips and marketing campaigns administered by Georgian National Tourism Administration.

In 2014, there were 232,558 international arrivals from EU countries, representing a 4% share of total arrivals and an increase of 11% over last year.

The largest share of visitors, 86% (4,757,264), arrived in Georgia by land transport, followed by 643,088 (12%) by air transport. Arrivals by sea and railway had almost the same share of 43,692 (1%) and 71,515 (1%) respectively. The busiest border was Sarpi (on the Turkish border), which saw 1,469,587 border crossings in 2014, amounting to 27% of all border crossings. This was followed by Sadakhlo (on the Armenian border) at 18% and Tsiteli Khidi (on the Azerbaijani border) at 17%.

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 19 border checkpoints. 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: Tbilisi, Akhkerpi, Guguti, Vale, Vakhtangisi, Ninotsminda, Sadakhlo, Sarpi, Kazbegi, Tsodna, Tsiteli Khidi, Gardabani, Samtatskaro, Kulevi.

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

Transit visits- include visits that last less than 24 hours in which different borders are used to enter and exit the country.

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

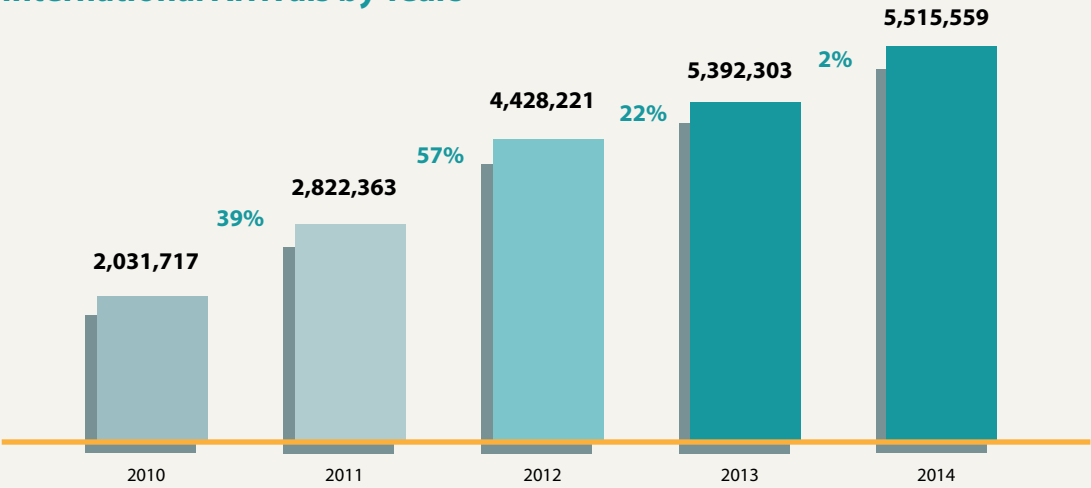
More detailed information can be found on the Georgian National Tourism Administration's website: www.gnta.ge

International Arrivals by Types

	2011	2012	2013	2014	Change % 2013-2014
Total	2,822,363	4,428,221	5,392,303	5,515,559	2,3%
24 hours and more	1,318,968	1,789,592	2,065,296	2,229,094	7,9%
Same-day visits	1,011,990	1,883,670	2,138,216	2,172,429	1,6%
Transit	491,405	754,959	1,188,791	1,114,036	-6,3%

Source: The Ministry of Internal Affairs of Georgia

International Arrivals by Years



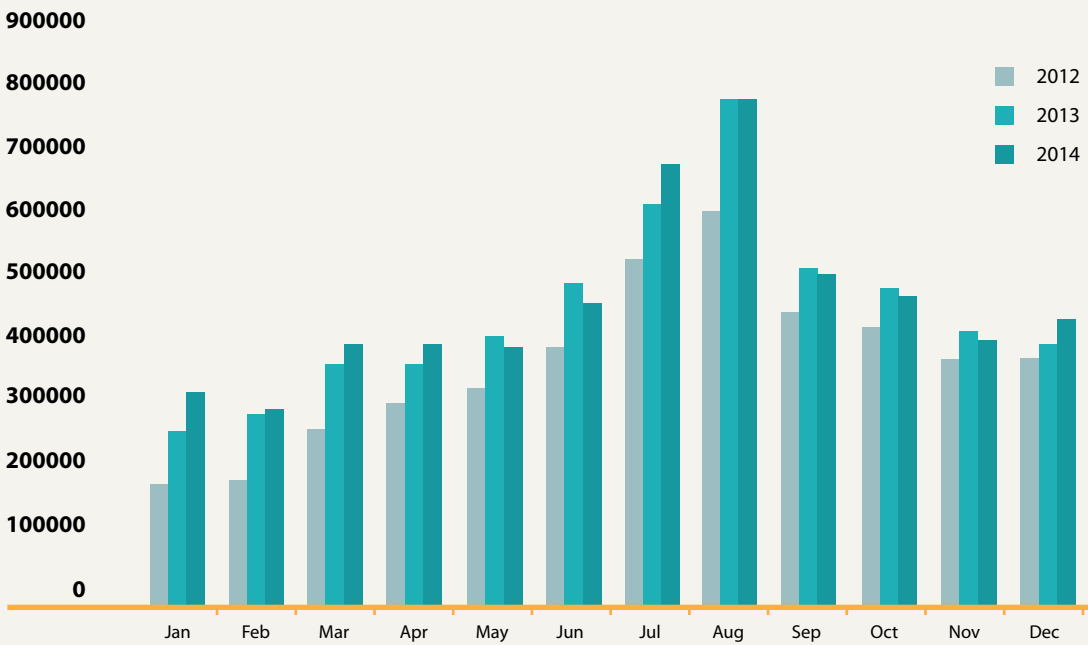
Source: The Ministry of Internal Affairs of Georgia

International Arrivals by Regions

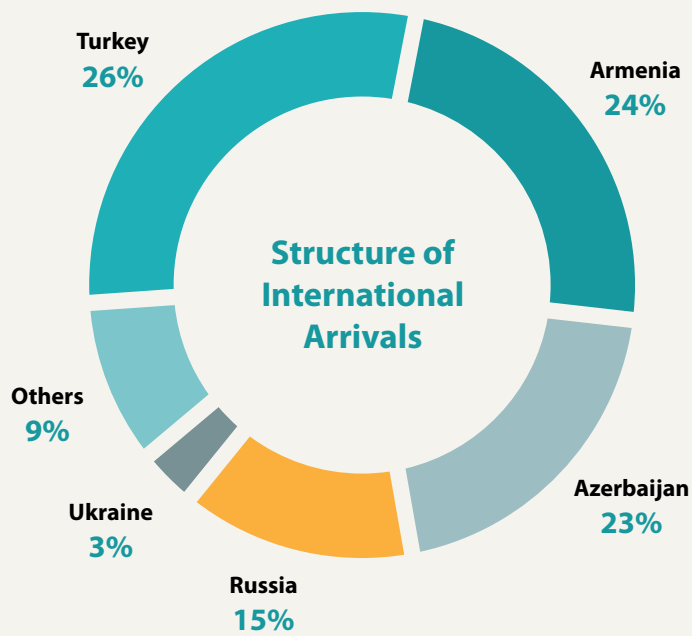
Region	2013	2014	Change	change %
Total	5,392,303	5,515,559	123, 256	2%
Europe	5,168,046	5,354,633	186,587	4%
Americas	32,583	34,634	2,051	6%
East Asia/Pacific	121,654	81,303	-40,351	-33%
Africa	5,024	4,109	-915	-18%
Near/Middle East	63,063	38,764	-24,299	-39%

Source: The Ministry of Internal Affairs of Georgia

International Arrivals by Months



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	2013	2014	Change	%
Turkey	1,597,438	1,442,695	-154,743	-10%
Armenia	1,291,838	1,325,635	33,797	3%
Azerbaijan	1,075,857	1,283,214	207,357	19%
Russia	767,396	811,621	44,225	6%
Ukraine	126,797	143,521	16,724	13%
Iran	85,598	47,929	-37,669	-44%
Poland	36,946	46,314	9,368	25%
Israel	39,922	42,385	2,463	6%
Germany	30,815	33,446	2,631	9%
Kazakhstan	21,148	28,394	7,246	34%

Source: The Ministry of Internal Affairs of Georgia

Average Length of Stay

Year	2013	2014
Total Length of Stay (days)	21,486,977	23,538,266
Total Number of Arrivals	5,392,303	5,515,559
Average Length of Stay	4.0	4.3

Source: The Ministry of Internal Affairs of Georgia

International Arrivals by Borders

Border name	Border with	2013	2014	Change	%
Total	↓	5,392,303	5,515,559	123,256	2%
Including	↓	↓	↓	↓	↓
Sarpi	TR	1,605,666	1,469,587	-136,079	-8.5%
Sadakhlo	AM	922,891	968,079	45,188	4.9%
Tsiteli Khidi	AZ	851,202	957,901	106,699	12.4%
Kazbegi	RU	701,302	699,889	-1,413	-0.2%
Tbilisi Airport		462,184	493,895	31,711	6.9%
Tsodna	AZ	211,333	241,164	29,831	14.1%
Ninotsminda	AM	209,920	240,322	30,402	14.5%
Vale	TR	129,474	99,561	-29,913	-23.1%
Kutaisi Airport		68,568	83,665	15,097	22.0%
Batumi Airport		54,975	65,528	10,553	19.2%
Vakhtangisi	AM	34,489	49,271	14,782	42.9%
Gardabani Railway	AZ	26,731	36,246	9,515	35.6%
Sadakhlo Railway	AZ	36,245	35,269	-976	-2.7%
Guguti	AM	32,278	30,943	-1,337	-4.1%
Batumi Port		22,712	24,491	1,779	7.8%
Poti Port		19,006	17,452	-1,554	-8.1%
Kulevi Port		2,521	1,749	-772	-30.6%
Samtatskaro	AZ	411	394	-17	-4.1%
Akhkerpi	AM	395	153	-242	-61.3%

Def: AM-Armenia, AZ-Azerbaijan, RU-Russia, TR-Turkey

Source: The Ministry of Internal Affairs of Georgia

Travel Behavior of the Georgian Residential Population, II-IV Quarters, 2014



In the given period the number of domestic visits amounted to 10.8 million. The majority of visits were from Tbilisi (24%) and Imereti (21%). Most visits were conducted to large cities.

Duration and Purpose of Travel

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

Domestic visitors generally travel to visit friends or relatives (52%), followed by 13% making trips for shopping. Only 9% traveled for holiday, leisure and recreation purposes. Other frequently observed purposes for visits include health and medical care (10%), visits to second homes (6%), and business or professional purposes (6%).

Travel Destinations

The most common destination was Tbilisi. A total of 26% of domestic trips were made to the capital city, followed by 8% to Kutaisi and 7% to Batumi. Among other destinations visited were: Rustavi (2%), Akhaltsikhe (2%), Telavi (2%) and Kobuleti (2%).

Between the regions the most popular places were Imereti, Ajara and Kakheti with 19%, 12% and 8% of visitors respectively.

Accommodation

A total of 59% of domestic travelers stayed in the private homes of friends and relatives. This is partially a consequence of the dominant influence of the visiting friends or relatives segment. A considerably large number of Georgians, 27%, stayed in their own homes while travelling, while 6% stayed in a rented apartment.

Expenditure

Total expenditure by domestic visitors during the estimation period was more than 1.57 billion GELS and average expenditure per visit was around 146 GEL. The largest share of visitors' expenditure, 33%, 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 to 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 over the last month. The duration of the interviews were 15-20 minutes.

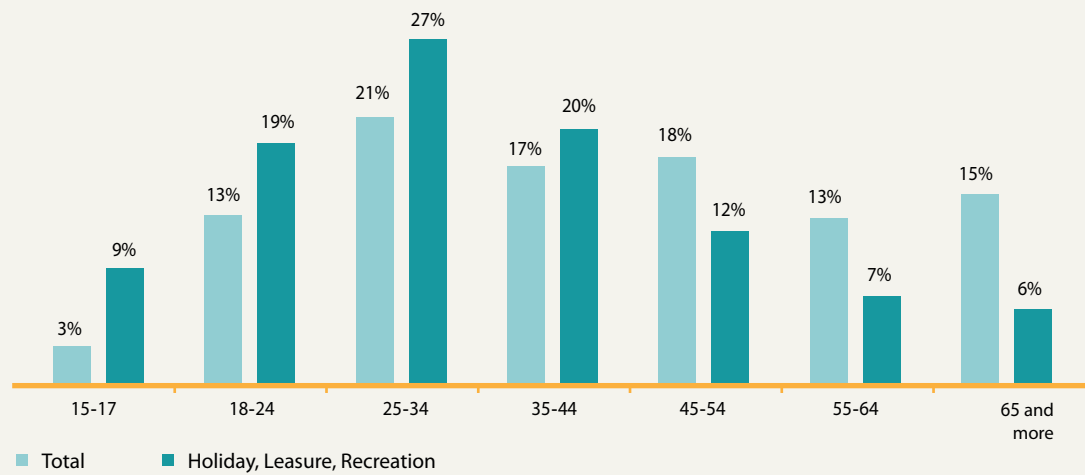
In line with UNWTO Recommendations on Tourism Statistics domestic tourism refers to trips of residents within Georgia to outside of their usual environment.

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.

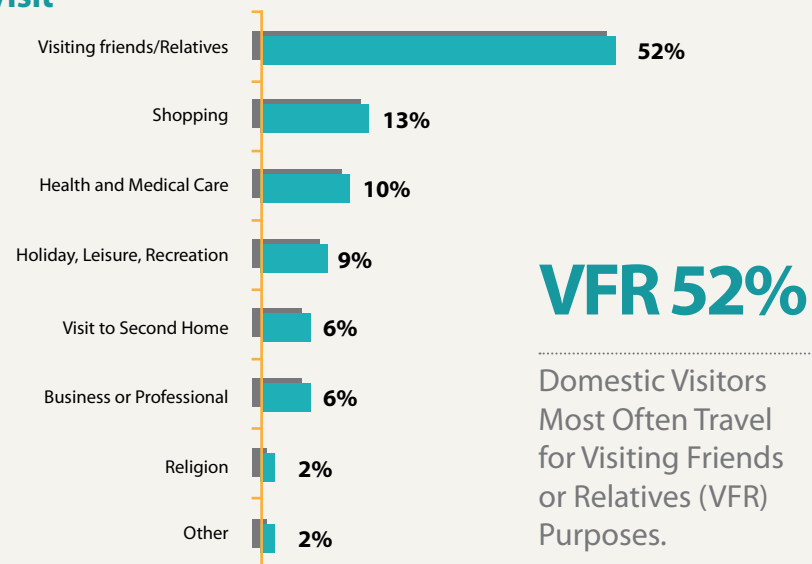
More detailed information can be found at www.gnta.ge and www.geostat.ge

Age Groups



Source: National Statistics Office of Georgia

Main Purpose of Visit



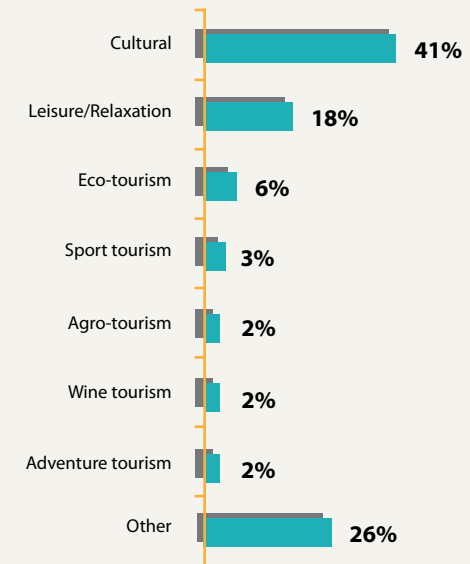
Source: National Statistics Office of Georgia

VFR 52%

Domestic Visitors
Most Often Travel
for Visiting Friends
or Relatives (VFR)
Purposes.

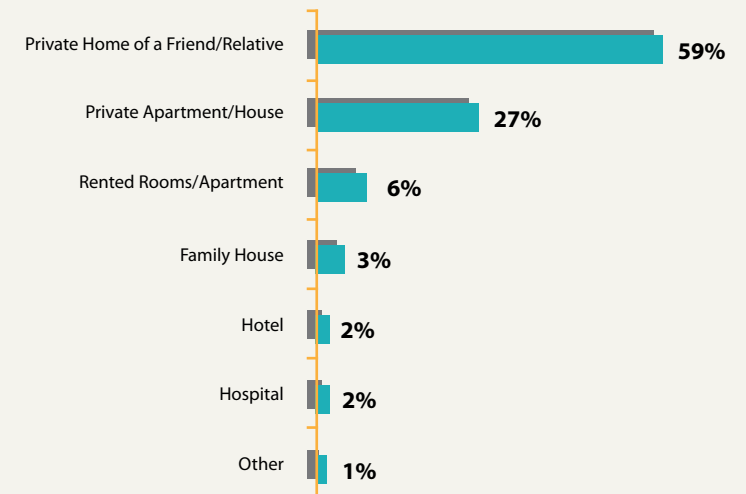


Tourism Types



Source: National Statistics Office of Georgia

Accommodation



Source: National Statistics Office of Georgia

Expenditure Structure

Components	Total Expenditure	Share of Total Expenditure
Served food and drinks	515,249,804	33%
Shopping	404,399,610	26%
Local transport	254,445,805	16%
Accommodation	69,242,419	4%
Cultural and entertainment services	38,197,520	2%
Commercial purchases	24,181,880	2%
Other expenditure	267,993,285	17%

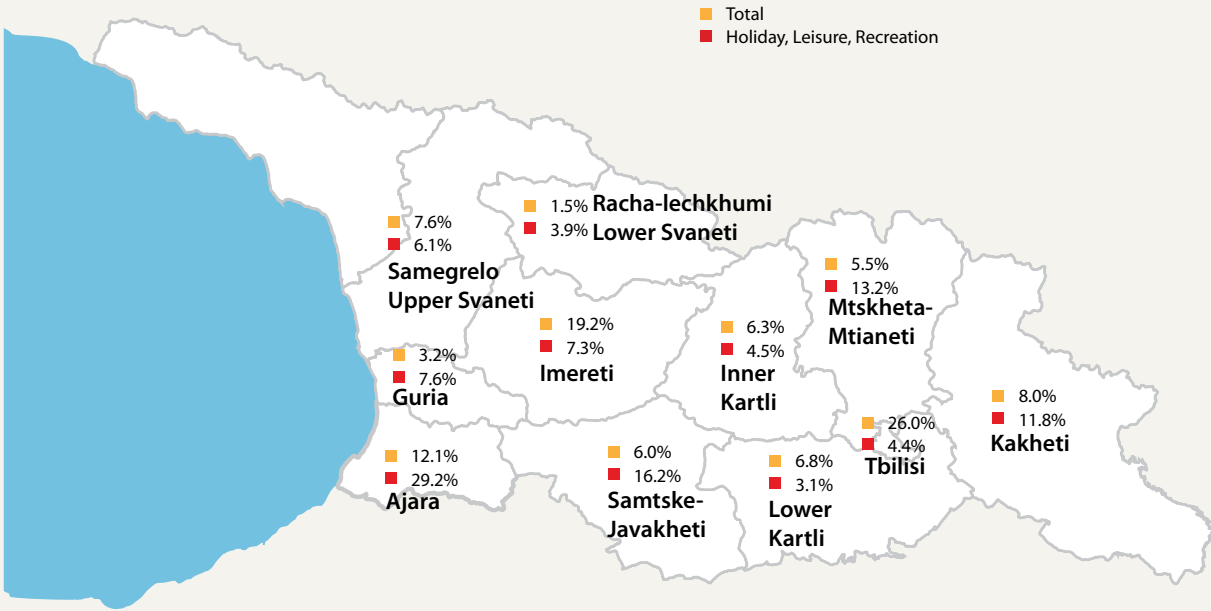
Source: National Statistics Office of Georgia

Duration of Stay

Place of Residence	Place of Residence
Tbilisi	5
Imereti	2
Ajara	2
Guria	2
Kakheti	2
Samegrelo-Upper Svaneti	2
Lower Kartli	2
Mtskheta-Mtianeti	1
Samtskhe-Javakheti	1
Inner Kartli	1

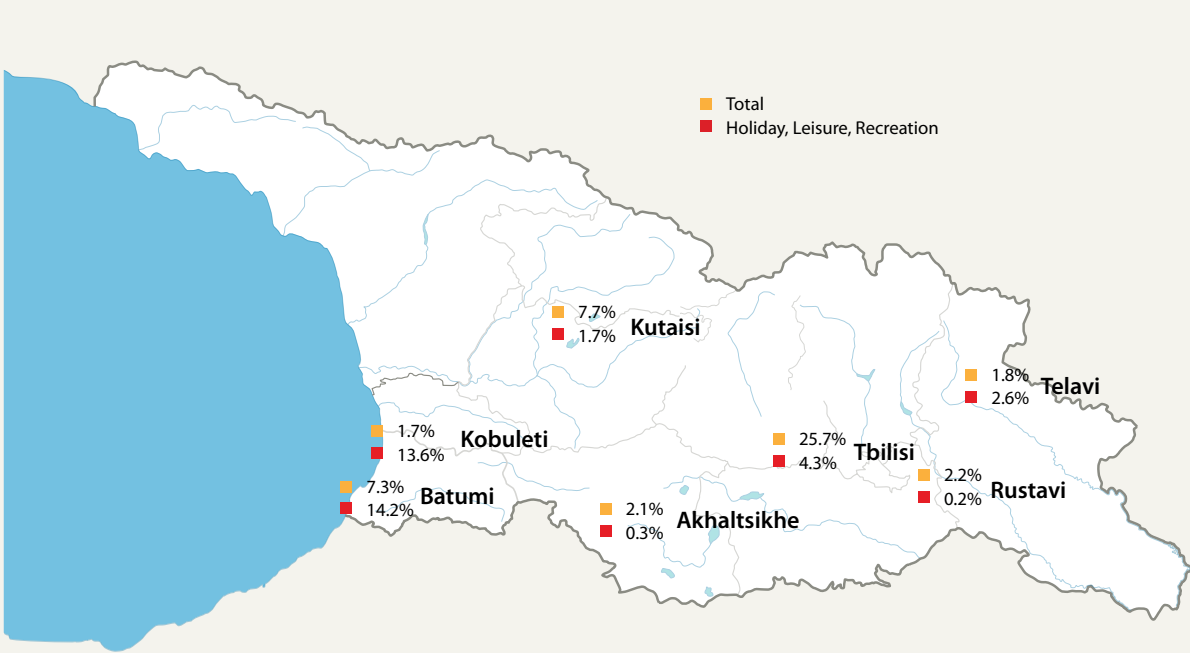
Source: National Statistics Office of Georgia

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 2014 was 2.4 trillion USD (2.9% of GDP) and it supported 105 million jobs. However, taking into account the combined direct and indirect impact of travel and tourism, the WTTC assesses the total economic contribution of this sector to be 9.8% of world GDP in 2014. It is responsible for 1 in 11 jobs, 4.3% of total economic investment and 5.7% of world exports (Economic Impact of Travel and Tourism 2015, WTTC).

Tourism– an Invisible Export

The expenditure of foreign guests in Georgia has a huge effect on the national balance of payments. Approximately 59% 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 2014, the foreign exchange income from foreign tourism in Georgia amounted to 1.79 billion USD. Compared to 2013, this indicator increased by 4%. Foreign exchange expenditures for foreign tourism in Georgia amounted to 0.30 billion USD, compared to 2013 this indicator also increased by 1%. In 2014, the balance of foreign tourism in Georgia amounted to 1.49 billion USD, increasing 4% over 2013.

In 2014, foreign card operations of international travelers amounted to 1.14 billion GEL, an increase of 1% compared to 2013.

Employment Module in Tourism

In the fourth quarter of 2014, the total number of tourism-related jobs amounted to 195,100. The largest

share is employed in the transport sector, which accounts for 60% of all tourism jobs. Other significant contributors are hotels and restaurants, accounting for 13% of tourism employment. In 2014, the total contribution of tourism to employment was 11%.

Share of Tourism in the Economy

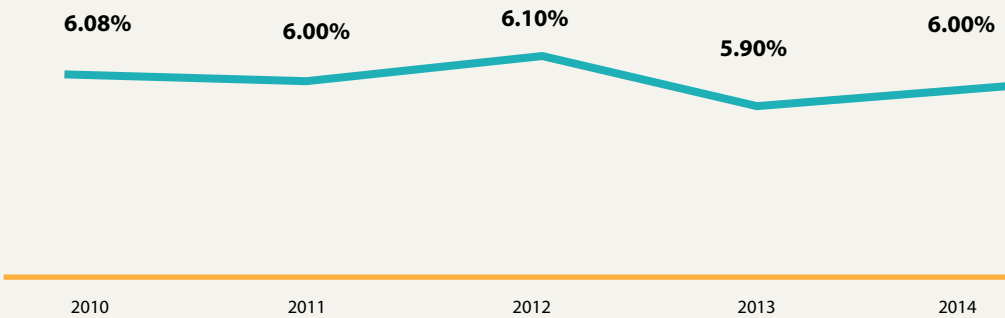
Between 2013 and 2014, the total value added in the tourism sector increased by 10% and reached 1.52 billion Gel due to increased demand. As a result, tourism's gross value added, as a proportion of GDP, increased from 5.9% to 6%. The additional value added in the tourism industry in 2014 was mainly driven by accommodation (an increase of 15%) and passenger traffic (air transport increased by 9% and other transport by 11%).

Main Published Indicators

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

More detailed information about the contribution of tourism to the economy, tourism receipts and employment 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

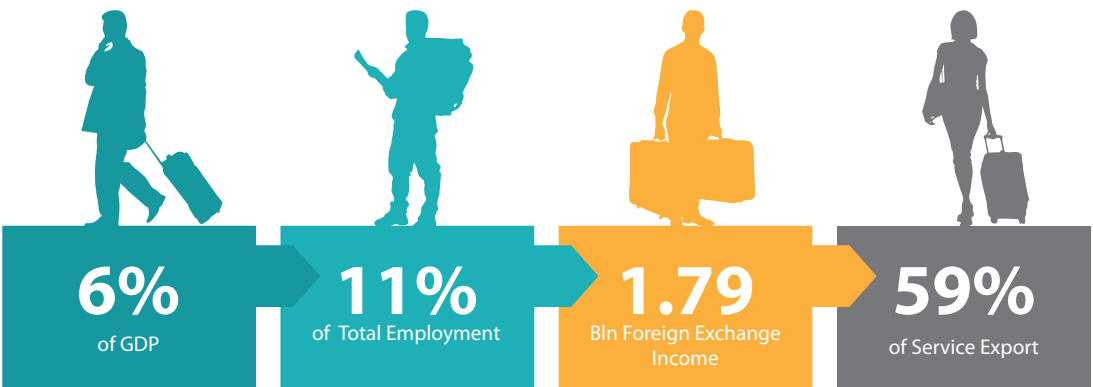


Source: National Statistics Office of Georgia

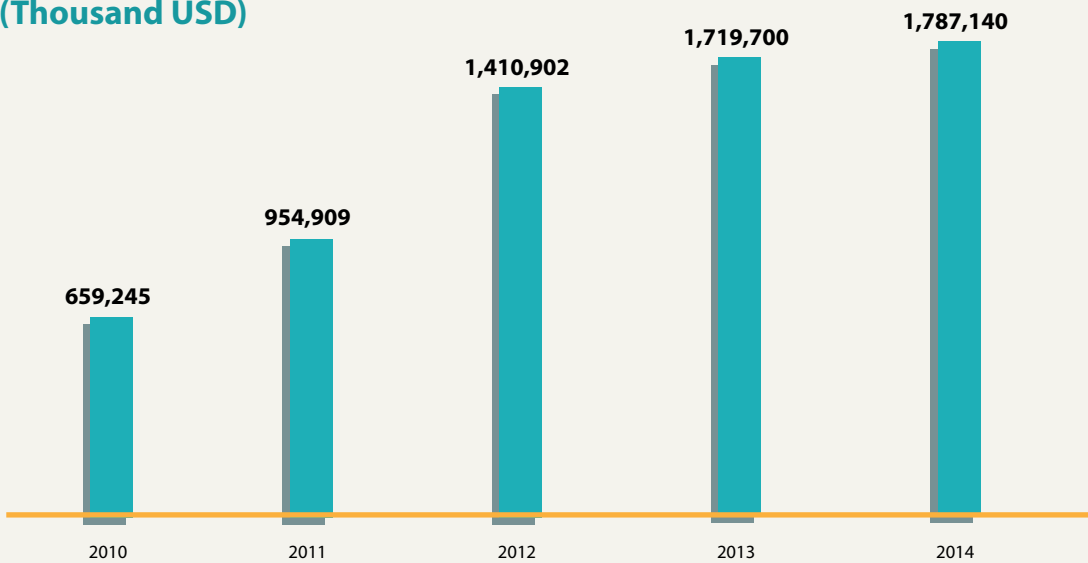
Tourism Value Added 2011-2014 (Thousand GEL)

	2011	2012	2013	2014	Change % 2013-2014
Total	1,263,700	1,369,000	1,374,400	1,518,800	10.4%
Including	↓	↓	↓	↓	↓
Accommodation units	114,200	132,400	185,000	212,400	14.8%
Food objects	353,200	378,200	341,200	367,000	7.6%
Transport	444,000	442,700	356,000	387,000	8.7%
Travel companies	353,500	415,700	492,200	552,400	12.2%

Source: National Statistics Office of Georgia

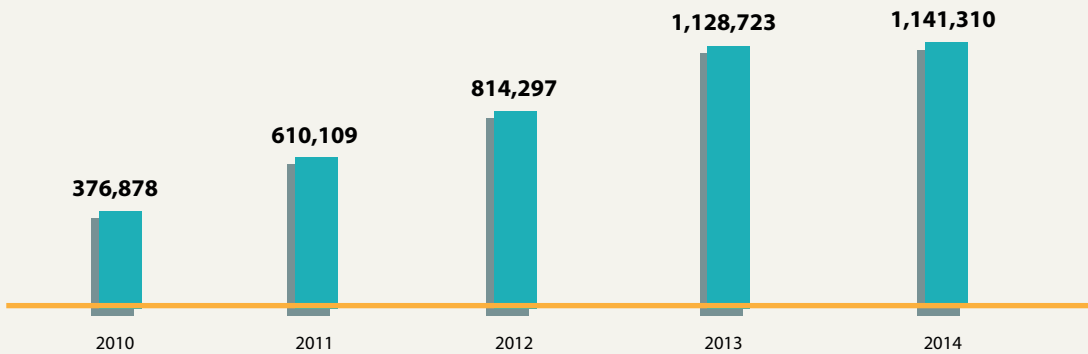


International Tourism Receipts (Thousand USD)



Source: National Bank of Georgia

Foreign Card Operations of International Travelers (Thousand GEL)

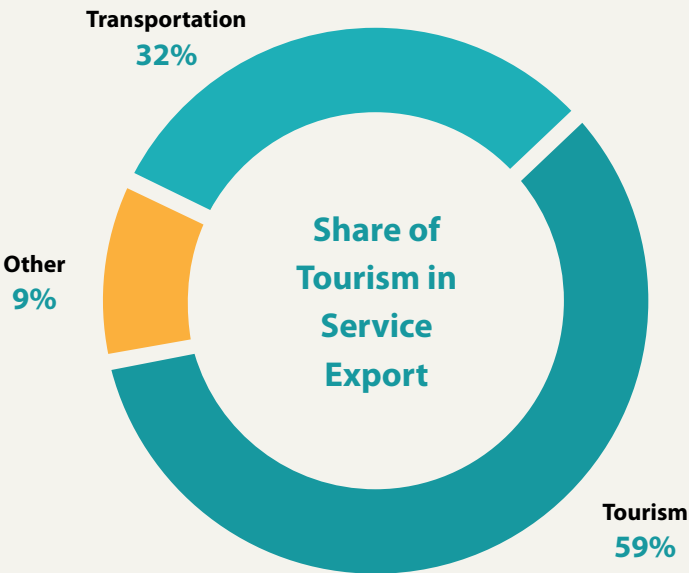


Source: National Bank of Georgia

Foreign Currency Revenues from Incoming Tourism 2011-2014 (Thousand USD)

	2011	2012	2013	2014	Change % 2013-2014
Total	954,909	1,410,902	1,719,700	1,787,140	3,9%
Including	↓	↓	↓	↓	↓
I. Q	163,990	235,931	302,818	315,461	4,2%
II. Q	222,250	330,827	426,524	429,690	0,7%
III. Q	326,569	487,721	604,202	649,775	7,5%
IV. Q	242,100	356,423	386,156	392,214	1,6%

Source: National Bank of Georgia



Source: National Bank of Georgia

The Aviation Market

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

Tbilisi and Batumi International Airports are run by the Turkish TAV Airports Holding Company. They started operations in February and May 2007, respectively. Mestia (Queen Tamar) Airport officially opened in 2011. The construction of Kutaisi's King David the Builder International Airport was finished in September 2012.

The capacity of Tbilisi International Airport is 2,000 passengers/hour; the capacity of Batumi and Kutaisi International Airports is both 500 passengers/hour; and Mestia Airport's capacity is 100 passengers/hour.

The opening of Kutaisi airport was marked by the launch of flights by the low-cost carrier (LCC) Wizz Air. Wizz Air was the third LCC to enter the Georgian market, after Pegasus and Fly Dubai. In 2014, Air Arabia, a new LCC entered the Georgian aviation market.

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 2014, it served 415,867 passengers (22%). Ukraine International Airlines is the second most popular airline with 279,389 passengers (15%). This is followed by Georgian Airways with 218,536 passengers (11%); Pegasus with 145,931 (8%); Siberia Airlines with 93,579 (5%); Belavia with 92,549 (5%); and Lufthansa with 65,475 (3%).

In total, 32 international and three domestic airlines operated in Georgia in 2014. The major airlines operating are: Turkish Airlines, Georgian Airways, Ukraine International Airlines, Pegasus, Siberia Airlines, Belavia, Lufthansa, Atlasjet International, Qatar Airways, Fly Dubai, Air Astana, Azerbaijan Airlines, Air Baltic, and Air Italy.

Georgian Airways, Siberia Airlines and two newly-introduced Russian companies – Aeroflot and Transaero – offer regular flights to Moscow. The entrance of further companies from the Russian

Federation into the Georgian market is currently under negotiation.

Several new international companies were introduced to the Georgian market, including two local companies: Air Caucasus and Vista Georgia. Air Arabia began regular flights to Sharjah, while Egyptian company Air Cairo began flights to Sharm el-Sheikh.

The year 2015 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 2015, the entrance on the Georgian market of the Greek airline Ellinair is planned, which would offer direct flights to Thessaloniki. In addition, an Arabic company will begin flights to Abu Dhabi.

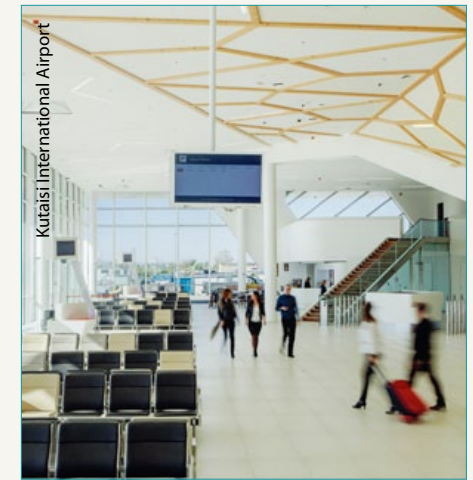
 13,576
Flights

+7%

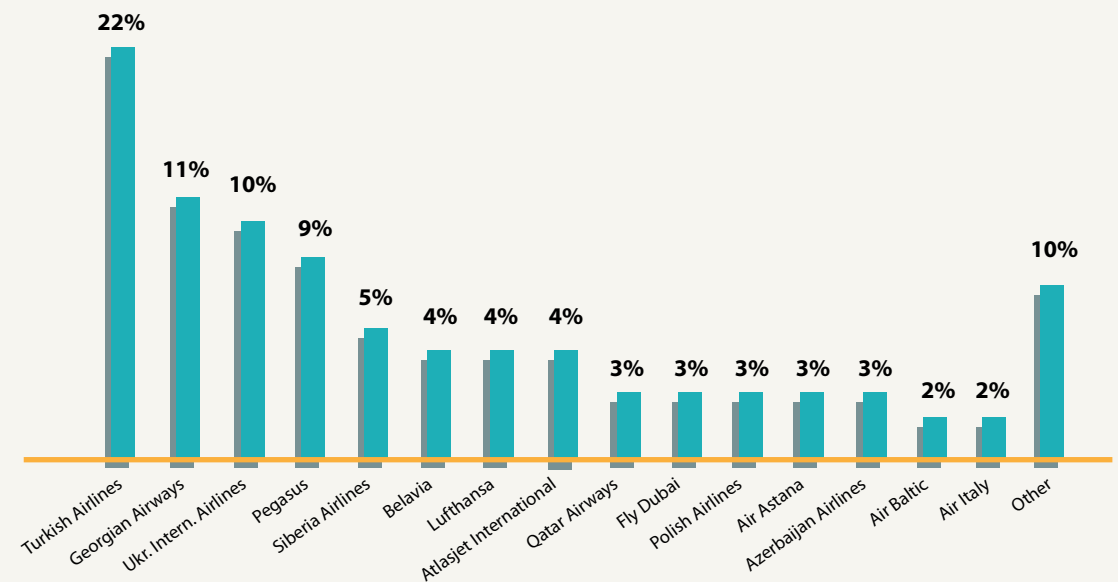
 2,008,514
Passengers

+10%

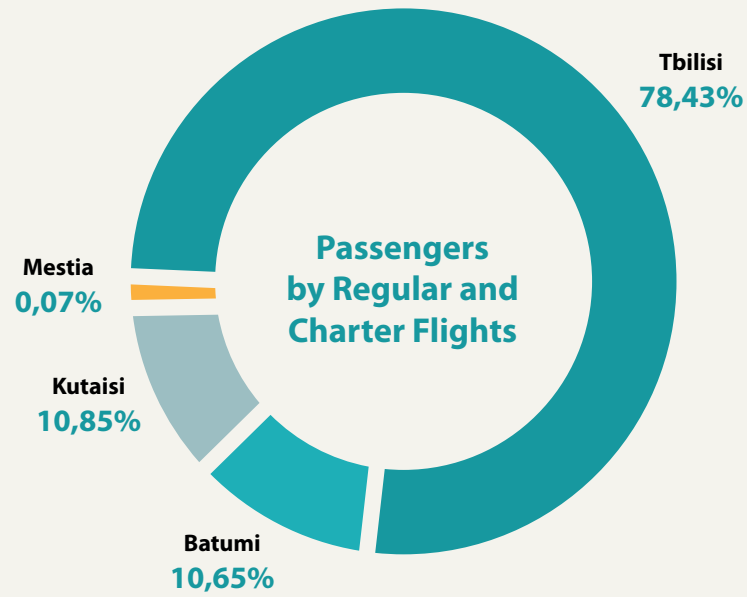
Following airports included: Tbilisi International Airport, Kutaisi David the Builder International Airport, Batumi International Airport, and Mestia Queen Tamar Airport.



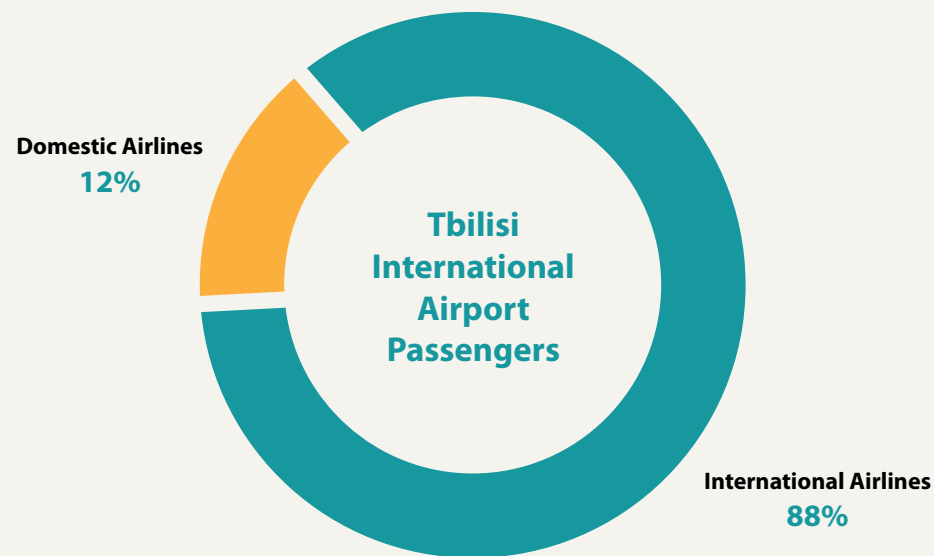
Tbilisi International Airport: Share of Airlines



Source: Georgian Civil Aviation Agency



Source: Georgian Civil Aviation Agency



Source: Georgian Civil Aviation Agency

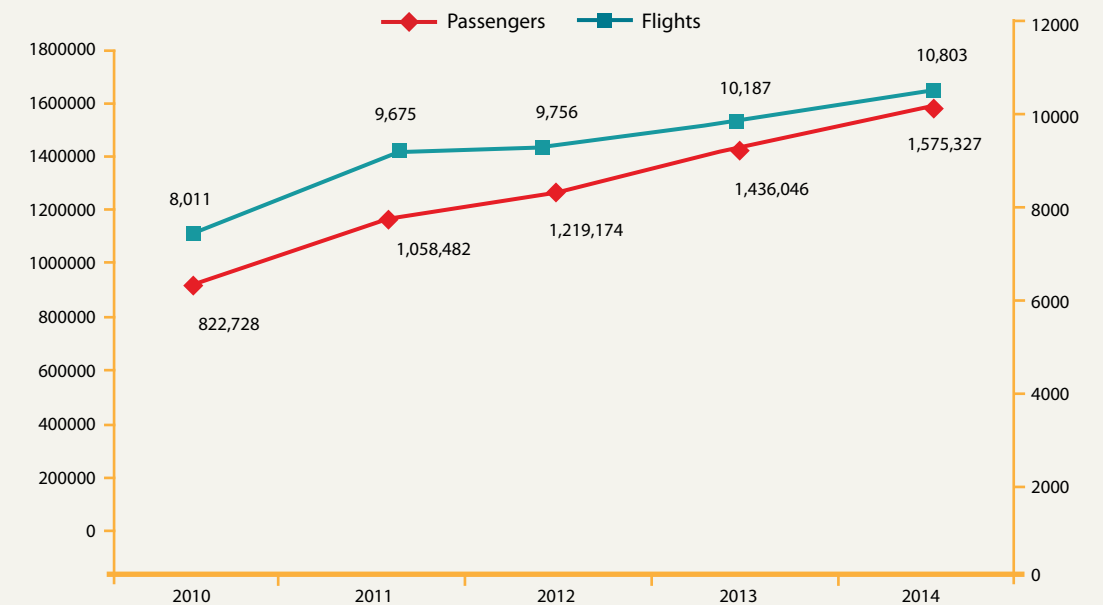
New Routes from Georgia in 2014

Airline	Route	Frequency
Air Arabia	Tbilisi - Sharjah	Four Times A Week
Aeroflot	Tbilisi - Moscow	Seven Times A Week
Transaero	Tbilisi - Moscow	Four Times A Week
Air Cairo	Tbilisi - Sharm el-Sheikh	Three Times A Week
Air Caucasus	Tbilisi - Baghdad* Tbilisi - Erbil*	Once A Week
Vista Georgia	Tbilisi - Almaty*	Twice A Week
	Tbilisi - Tehran*	Three Times A Week
Yan Air	Tbilisi - Kiev*	Three Times A Week
	Batumi - Kiev*	Once A Week

Source: Georgian Civil Aviation Agency

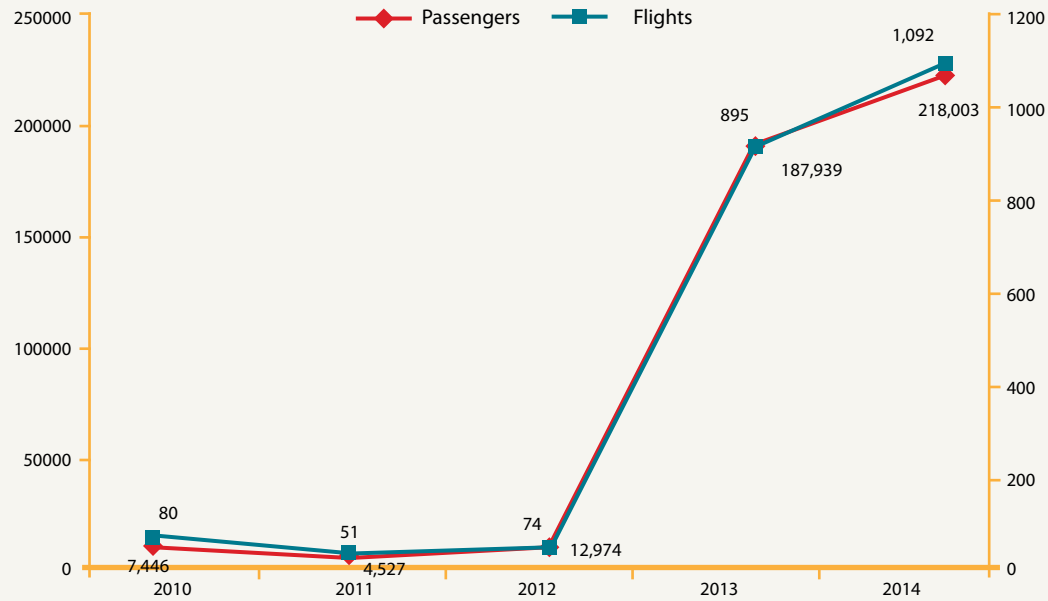
Note: *= No flights currently.

Tbilisi International Airport: Passengers and Flights



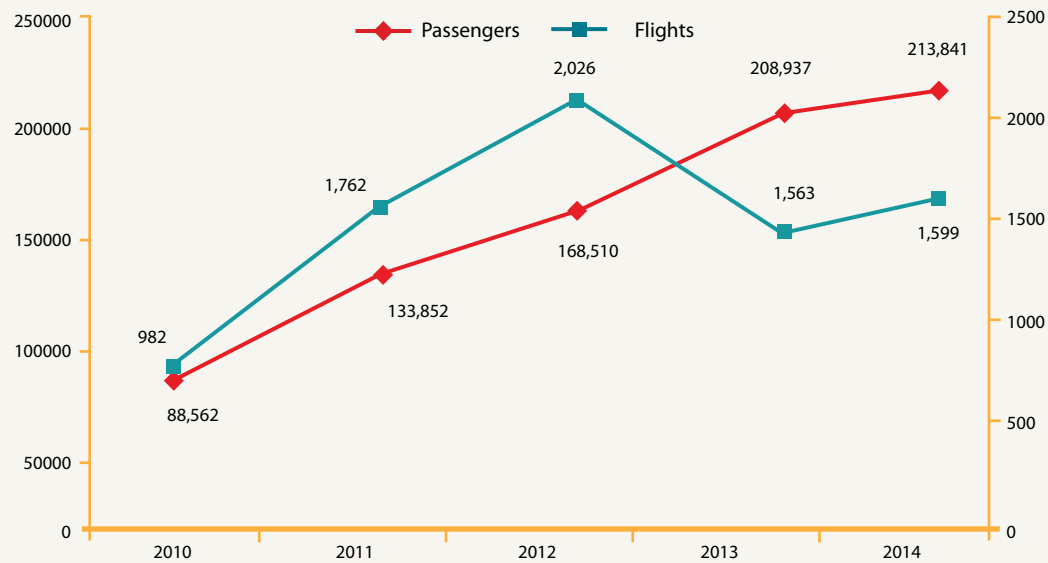
Source: Georgian Civil Aviation Agency

Kutaisi International Airport: Passengers and Flights



Source: Georgian Civil Aviation Agency

Batumi International Airport: Passengers and Flights



Source: Georgian Civil Aviation Agency



47,012
Beds in Georgia



Accommodation Market

The number of accommodation units registered in the database of the Georgian National Tourism Administration equals 1,332, with a total of 47,012 beds. The Ajara region boasts the largest number of beds, 10,793 (23%), followed by Tbilisi with 10,714 beds (23%).

The classification of accommodation units by number of rooms showed that the room category five rooms and less was the largest at 447 (34%).

Tbilisi boasts several international hotel brands: the Radisson Blue Iveria, the Tbilisi Marriott, the Courtyard Marriot, Sheraton, Holiday Inn and Citadines Apart hotel. In 2014, Best Western Tbilisi was added to this list. As regards Batumi, the existing hotels brands Sheraton and Radisson Blu have been joined by the Divan Brand. A number of brand hotels are also starting operations in the spa resorts of Georgia.

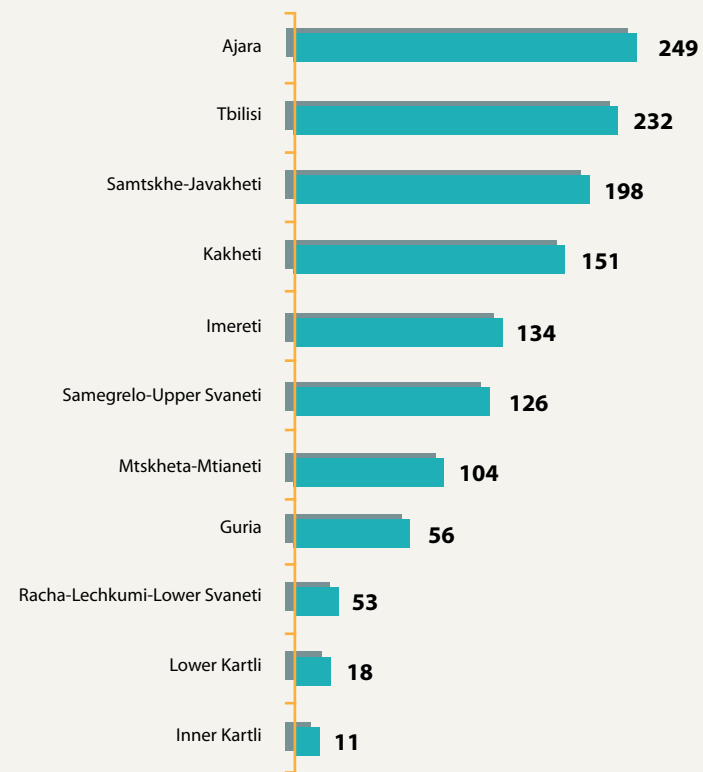
Planned and Ongoing Construction

There are currently several planned and ongoing constructions in Georgia. The construction of the following brand hotels are planned in Tbilisi: Kempinski, Radisson Park Inn, Millennium hotel, Rixos Tbilisi, Hyatt Regency and Hualing Hotels & Preferences. In Batumi, the construction of the Hilton Garden Inn, Babillon Tower and Crown Plaza Intercontinental are planned.

Several international chains are also expanding in Georgia. The construction of a Sheraton hotel is planned in Gudauri.

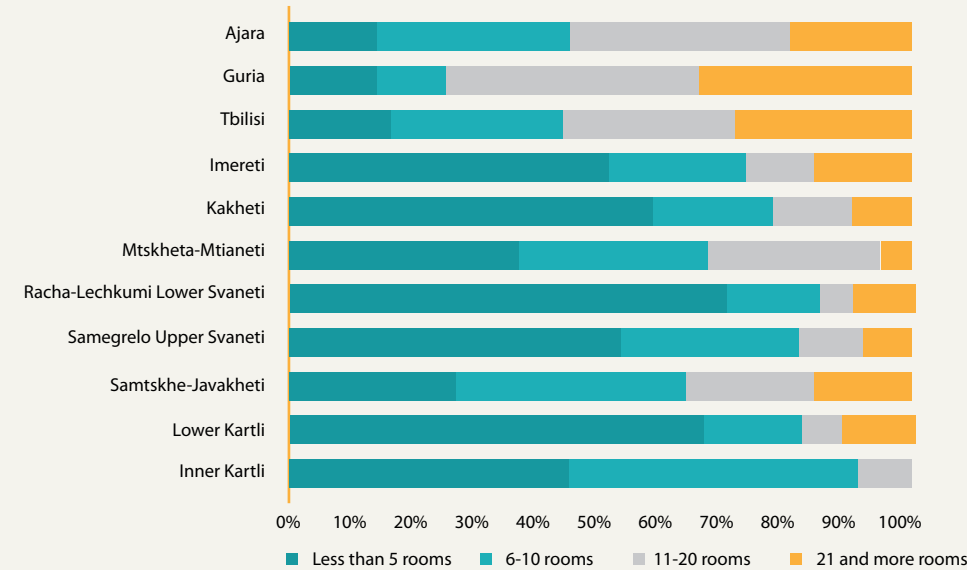
The majority of hotels being constructing are located in Tbilisi and the Ajara, Samtskhe-Javakheti, Imereti and Kakheti regions.

Number of Accommodation Units



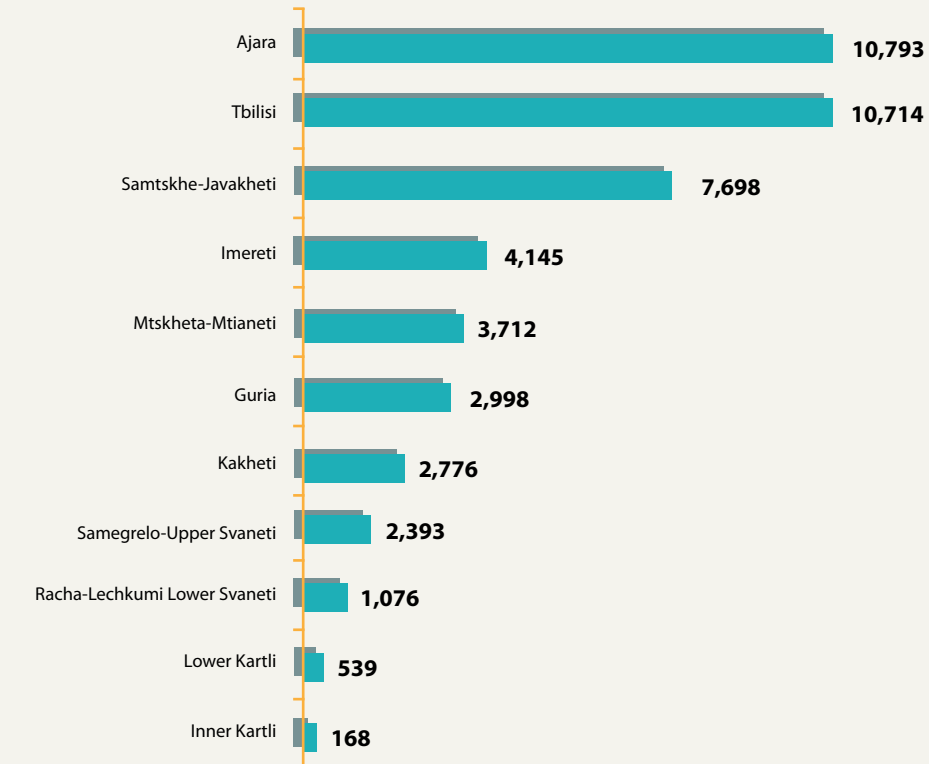
Source: Georgian National Tourism Administration

Accommodation Units by Types and Regions

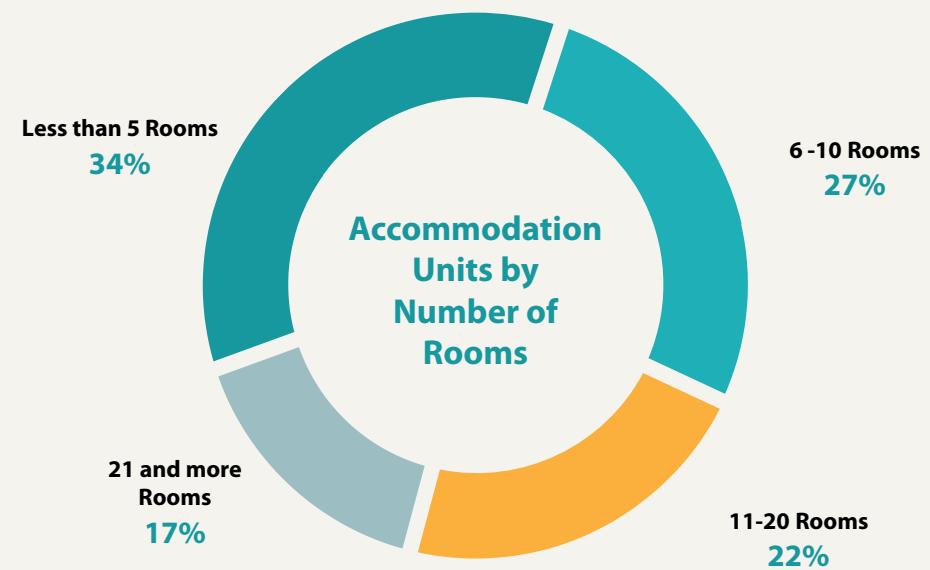


Source: Georgian National Tourism Administration

Bed Capacity by Regions



Source: Georgian National Tourism Administration



Source: Georgian National Tourism Administration

Sector Outlook

Although there were a lot of obstacles, the Georgian tourism sector continued to grow in 2014. The outlook for the sector remains highly optimistic and it is forecast that more jobs will be created and more income will be generated in the years to come. The number of arrivals to Georgia is expected to increase substantially thanks to various steps being taken by both the government in general and the Georgian National Tourism Administration in particular.

The actions taken by the GNTA increase the number of travelers to the country include: the development of tourism infrastructure; facilitating international travel; improving the quality of service; increasing awareness about Georgia; the implementation of marketing activities on domestic and international markets; and the development of tourist products.

The development of tourist infrastructure stands high among the priorities of the government. Four new tourist information centers were built in Tbilisi, Chkhorotskhu, Martvili and Zugdidi. In addition, the construction of several information centers is planned in the Bakuriani and Kazbegi municipalities.

Important work was carried out towards visa liberalization with the EU. Although the visa regulations for visitors to Georgia were changed, citizens of 94 countries can still enter the country. For other countries, an electronic visa portal was created through which potential visitors can resolve all visa-related issues online.

Another significant issue is the enhancement of service quality. This is achieved through the intensive training of representatives of the tourism and hospitality industry throughout Georgia. The new tourist hot line (#0800800909) that was introduced last year has been supplemented with an "online chat" service on www.georgiatravel, where tourists have the opportunity to receive all required information 24 hours a day.

The new www.georgia.travel website has gone online, offering a much more user-friendly experience. In addition, a new management panel of tourist units was elaborated, where google maps can be used to find information.

Marketing undoubtedly plays a vital role in the growth of tourism. The activities undertaken by the GNTA cover promotional campaigns on both domestic and international markets, press and familiarization trips,



National Geographic Traveler magazine included Georgia in its list of 50 of the world's best guided trips

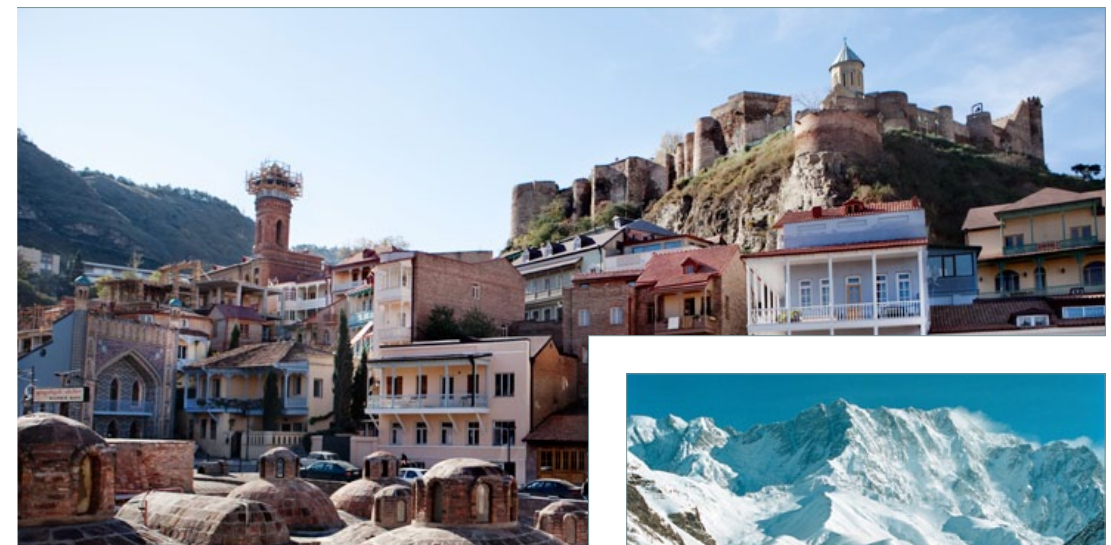
participation in international travel-fairs, production of print materials, social media marketing, etc.

Choosing the right markets is unquestionably an integral part of marketing. Alongside maintaining existing markets, the GNTA also concentrates on tapping into new countries. In 2014, the Georgian National Tourism Administration participated in 19 international tourism fairs, conducted marketing campaigns on nine target markets and hosted 46 press and fam trips. In addition, five marketing videos were prepared for advertising purposes.

Making the most of Georgia's rich natural and cultural resources by offering new tourist products provides increased possibilities for targeting travelers of different tastes. The GNTA's efforts focus on the development of different types of tourism, such as MICE, wine, eco, and adventure.

National Geographic Traveler magazine included Georgia in its list of 50 of the world's best guided trips. The Georgian tour was selected due to its offering an authentic travel experience connected with food, wine and culture. The list placed Georgia among top tourism destination countries such as France, Italy, Portugal, Scotland, Sweden, Switzerland and Denmark. In addition, in a number of international rankings Georgia ranks among the top 10 countries in terms of a secure country to travel in.

Georgia has been successful in international relations as well. In 2014, agreements of cooperation in the field of tourism were signed with Armenia and Turkmenistan, while a memorandum of understanding was signed with the Kingdom of Spain. Another significant event was the visit of the Secretary General of the UNWTO Taleb Rifai, which should deepen relations between the UNWTO and Georgia and support joint regional projects. Georgia also hosted the 4th UNWTO Silk Road meeting, which was attended by 18 country delegates and UNWTO representatives. In addition, a Committee Meeting on Statistics and the Tourism Satellite Account will be held in Georgia. This is the first time a committee meeting will be held outside of Spain.



European Youth Olympic Festival 2015

The 39th General Assembly of the European Olympic Committee chose the Georgian capital to host the European Youth Olympic Festival in 2015. Over 4,000 athletes from 49 European countries will participate in the festival taking place in Tbilisi. The sporting infrastructure of the city will be renovated according to European Standards and an "Athletes' Village" will be built. This festival represents a good opportunity for the country to showcase its rich tourism potential. For this event, the city of Tbilisi is expected to host more than 10,000 visitors, most of whom will require medium-class hotel accommodation and the rest will need high-class hotel accommodation, all within Tbilisi. Considering the fact that there are only 10,714 of such beds in Tbilisi, there is an immediate need for new hotel investment to fill the gap in supply.

UEFA Super Cup 2015

The UEFA Executive Committee has given Tbilisi the opportunity to host a major sports event, the UEFA Super Cup. The UEFA Super Cup is an annual football match between the winners of the Champions League and the Europa League. The game will be held at Dinamo Arena. This event will gather football fans from all over the world.

EBRD Annual Meeting

In 2015 in Tbilisi the annual meeting and business forum of the European Bank for Reconstruction and Development (EBRD) will be held for the first time in the Caucasus.

EBRD members include 64 countries and two international organizations (the EU and EIB). The annual meeting will be attended by the EBRD governors, 34 Ministers of Finance, alternate governors, representatives of businesses and international organizations and other guests. The expected number of guests will range between 1,200-1,500.

International Arrivals (UNWTO Classification)

	2013	2014	Change%
Central and Eastern Europe	3,390,455	3,722,359	10%
Armenia	1,291,838	1,325,635	3%
Azerbaijan	1,075,857	1,283,214	19%
Russia	767,396	811,621	6%
Ukraine	126,797	143,521	13%
Poland	36,946	46,314	25%
Kazakhstan	21,148	28,394	34%
Belarus	12,915	19,148	48%
Bulgaria	10,878	11,027	1%
Lithuania	5,647	10,917	93%
Latvia	6,336	7,908	25%
Czech Republic	6,562	6,259	-5%
Moldova	5,442	6,236	15%
Romania	3,524	4,135	17%
Uzbekistan	5,738	3,647	-36%
Estonia	3,721	3,450	-7%
Others	9,710	10,933	13%
Northern Europe	30,167	31,113	3%
United Kingdom	16,672	18,586	11%
Sweden	4,182	4,413	6%
Denmark	2,501	2,358	-6%
Others	6,812	5,756	-16%
Southern Europe	42,853	44,206	3%
Greece	22,024	21,464	-3%
Italy	9,677	10,421	8%
Spain	4,723	5,419	15%
Others	6,429	6,902	7%
Western Europe	66,661	71,092	7%
Germany	30,815	33,446	9%
France	14,239	14,090	-1%
Netherlands	8,181	8,843	8%
Austria	5,758	6,109	6%
Belgium	3,763	4,358	16%
Switzerland	3,695	3,962	7%

Others	210	284	35%
East/Med Europe	1,637,910	1,485,863	-9%
Turkey	1,597,438	1,442,695	-10%
Israel	39,922	42,385	6%
Others	550	783	42%
Caribbean	558	684	23%
Central Amer.	193	310	61%
North Amer.	30,214	32,037	6%
United States of America	26,713	28,272	6%
Canada	3,290	3,419	4%
Others	211	346	64%
South Amer.	1,618	1,599	-1%
North-East Asia	16,632	16,455	-1%
China	8,830	8,632	-2%
Japan	4,513	4,216	-7%
Others	3,289	3,607	10%
Oceania	2,838	3,374	19%
South Asia	93,043	53,696	-42%
Iran	85,598	47,929	-44%
Others	7,445	5,767	-23%
South-East Asia	9,136	7,776	-15%
Philippines	7,255	5,659	-22%
Others	1,881	2,117	13%
Near/Middle East	63,063	38,764	-39%
Iraq	41,239	21,752	-47%
Saudi Arabia	3,780	5,485	45%
Kuwait	1,511	2,435	61%
United Arab Emirates	1,339	2,216	65%
Others	15,194	6,876	-55%
East Africa	2,591	1,857	-28%
West Africa	673	528	-22%
South Africa	1,044	1,132	8%
North Africa	655	510	-22%
Central Africa	61	82	34%
Other Countries	1,938	2,122	9%
Total	5,392,303	5,515,559	2%

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

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