



# INTERNATIONAL VISITOR SURVEY – WAVE II REPORT

FINAL

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# **INTERNATIONAL VISITOR SURVEY – WAVE II REPORT**

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DELOITTE CONSULTING LLP

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# DATA

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# ABSTRACT

ACT Research prepared this Second Wave International Visitor Survey Report for Deloitte Consulting LLP in the framework of USAID-funded Economic Prosperity Initiative (EPI). The report represents the period July to September 2011.

The research was undertaken to create an annual set<sup>1</sup> of visitor surveys based on statistically valid templates and methodologies. The data produced is necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU - Eurostat) and United Nations World Tourism Organization (UNWTO) obligations.

Face to face interviews were conducted at a variety of border-crossing points (road, airport, port and railway) with 1096 international visitors leaving Georgia between August 26 and September 5, 2011.

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<sup>1</sup> Surveys are undertaken quarterly

# ABBREVIATIONS/DEFINITIONS

ACT	ACT Research (Market Research & Consulting Company)
EPI	Economic Prosperity Initiative
EU	European Union
GDP	Gross Domestic Product
GEL	Georgian Currency - the Lari
GNTA	Georgian National Tourism Administration
MICE	Meetings, Incentives, Conferences & Exhibitions
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
Formal information sources	Information acquired from internet, media, tourist agencies etc.
Informal information sources	Information acquired from relatives, friends, and colleagues - word of mouth
Holiday-makers	Leisure, recreation or vacation tourists.
Neighboring countries	Turkey, Russia, Azerbaijan and Armenia
Tourist	A visitor who stays at least one night in a collective or private accommodation in the place/country visited.
Visitor	Any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.
Word of Mouth	Information received from friends, relatives, colleagues, or other persons

# CONTENTS

- I. EXECUTIVE SUMMARY ..... 1
- II. APPENDICES..... 4
  - A. BACKGROUND ..... 5
  - B. METHODOLOGY ..... 6
  - C. FINDINGS..... 8

# I. EXECUTIVE SUMMARY

The International Visitor Survey was conducted to examine the behavior, satisfaction, expenditure and profile of international visitors to Georgia. This document reports on the second in a series of five quarterly international visitor surveys.

The survey results indicated that the socio-economic profile of a typical international visitor is a 25-34 year old (30%), employed (48%) male (64%). Most international visitors are residents of Georgia's neighboring countries; Armenia (26%), Azerbaijan (25%), Turkey (21%) and Russia (11%). Only 16% of international visitors surveyed were of Georgian descent, and they predominantly visited from Russia (47%), 'Other Europe' (30%) and Turkey (22%).

About one third (29%) of the visitors traveled to Georgia for the first time. Of these visitors, 36% traveled to Georgia for leisure/recreation/vacation purposes, while 21% travelled on business and 9% came to visit friends and relatives.

The survey results indicated that the average international visitor has been to Georgia twice, although this number varied according to the purpose of visit. For example, visitors travelling on business traveled ten times on average, while those visiting friends and relatives made an average of seven trips. Leisure/recreation/vacation travelers have visited Georgia only twice on average.

Georgia hosted residents of neighboring countries more often than visitors from other countries; Turkish residents made an average of three trips, Armenian, Russian and Azeri visitors each travelled twice on average, while travelers from other countries came only once on average.

Based on the survey data, most visitors (80%) organized their own travel while only 2% used a travel agency. In general, the use of a travel agency to organize a visit to Georgia was quite low among all visitors regardless of country of residence, although 12% from 'Other Europe' and 10% from 'Other Countries' worked with a travel agency.

In order to plan their trip, visitors relied on a variety of information sources, but particularly 'word of mouth'. Thirty-five percent of international visitors obtained information via 'word of mouth' from their friends and relatives and another 35% relied on data gathered while on previous visits.

In addition to information gained via 'word of mouth', visitors from Central and Eastern Europe (38%) as well as 'Other Countries' (35%) and 'Other Europe' (27%) also relied on the Internet for information about Georgia. The most popular websites among international visitors were [www.georgia.travel](http://www.georgia.travel), [www.lonelyplanet.com](http://www.lonelyplanet.com) and [www.wikitravel.com](http://www.wikitravel.com). However, the Internet was not often utilized for booking travel arrangements as only 4% of international visitors booked air tickets online, 1% booked accommodation online and 0.5% booked train tickets online.

International visitors travel alone or with companions depending on the purpose of visit; those traveling on business (68%) or to visit friends and relatives (41%) tend to travel alone, while holiday makers tend to travel with immediate and extended family, friends and relatives (82%).

The survey found that visitors from Central and Eastern Europe (44%), 'Other Countries' (41%) and Turkey (46%) tend to travel with friends, while residents of 'Other Europe' (50%)

and Russia (43%) mostly travelled alone. Azeris most often travelled with immediate (32%) or extended (20%) family members.

Most of the international visitors (74%) used land transportation, such as private vehicles and/or minibuses, to travel to Georgia. However, 19% of international visitors arrived by plane. A very small percentage used a train and/or public vessel.

The survey data demonstrated that 40% of international visitors did not pay for accommodation, as 28% stayed with relatives and/or friends and 12% stayed in a personal home or second home. However, 33% of international visitors spent a night in a hotel; this type of accommodation was most popular among those from 'Other Countries' (70%), 'Other Europe' (39%) and Azerbaijan (38%). Also, 39% of holiday makers and 55% of business visitors stayed in hotels.

The survey data found that the majority of international visitors (68%) traveled to Georgia for leisure/recreation/vacation, while 21% travelled to visit friends and relatives. Only 3% of tourists were engaged in business, while other purposes such as purchasing goods with the intention of resale, education and training, health and medical care, and shopping did not exceed 2% each.

International visitors chose Georgia for its nature and landscape, rest and relaxation and cuisine. Georgian wine had a strong role in the market as well, as 41% of those surveyed demonstrated an interest in wine tasting prior to visiting the country.

Batumi was the most visited location by international visitors and hosted 51% of those surveyed. Tbilisi was the second most popular location and 45% of visitors spent time in the Georgian capital. Other popular destinations for international visitors were Kobuleti (14%), Ureki (7%), and Kutaisi (6%).

Visitors spent two nights on average in Batumi, Tbilisi and Kutaisi. As for the Black Sea resorts, visitors spent an average of seven nights in Kobuleti and five nights in Ureki.

During the period July – September 2011, 960,307 international visitors came to Georgia, and spent a total of GEL 683,738,584 with average expenditures per visitor of GEL 712. International business visitors had the highest average per capita expenditure at GEL 1016. Those visiting for leisure/recreation/vacation spent an average of GEL 799 per tourist while those visiting friends and relatives spent GEL 507.

International visitors generated revenues in the following sectors: a) restaurants, food and beverage - GEL 198,284,189; b) hotels and accommodation - GEL 123,072,945; c) shopping – GEL 75,211,244; and d) cultural and entertainment - GEL 61,536,473.

The visitors surveyed were asked to rate their experiences on a '4 Point Scale' where '1' indicated extreme dissatisfaction and '4' represented great satisfaction. Visitors rated Georgia well overall with a score of 3.7 and the most satisfied were those travelling on business (3.9). The following attractions received the best ratings: Georgian nature, and historical and cultural heritage - 3.8, and Georgian hospitality, Georgian wine and cuisine - 3.7.

The visitors surveyed gave the lowest ratings for Georgian infrastructure and transport services, as well as customer service at restaurants, cafes, hotels, travel agencies or tourist information centers. Visitors reported experiencing the following problems: a) poor service in hotels, restaurants and travel agencies; and b) bad infrastructure such as poor roads to tourist places, and public toilets.

The vast majority of visitors (93%) displayed an interest in visiting Georgia again while those from Central and Eastern Europe, 'Other Europe' and 'Other Countries' were slightly less interested in returning than other groups.



The majority of the visitors surveyed (94%) would recommend Georgia to friends and relatives, although residents of 'Other Countries' were slightly less likely to recommend the country.

## **II. APPENDICES**

- A. BACKGROUND**
- B. METHODOLOGY**
- C. FINDINGS**

## A. BACKGROUND

Tourism is a priority sector for EPI, and wine tourism and MICE tourism are priority value chains. A solid understanding of tourist behavior has been a significant factor in the success of many countries that have built tourism into a strong Gross Domestic Product (GDP) contributor. Such data is fundamental to sound policy formulation. However, simply measuring the contribution of tourism to the national economy is not enough. EPI's value chain assessment process and other research have pinpointed several important issues:

- Until recently, there has been limited availability of useful tourist data;
- The Georgian National Tourism Administration (GNTA) has undertaken tourism surveys in the past that have been neither comprehensive nor consistent in the methodology used.
- Georgia's tourism sector directly comprises suppliers of tourism products and services, tourist attractions, government entities, educational institutions and private sector associations. To build a complete picture of the tourism industry and define specific policy initiatives, it is critical to obtain and analyze data from many of these individuals and organizations. It is equally important for all of these value chain actors to benefit from a transparent tourism information system that can underpin broad input to policy making and enable better planning and implementation in all segments of society that are involved in the success of Georgian tourism.

GNTA and EPI are, in partnership, undertaking an annual visitor survey based on statistically valid methodologies that would produce the data necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU) and United Nations World Tourism Organization (UNWTO) obligations. The survey data collected will also be used for EPI Performance Monitoring purposes.

## B. METHODOLOGY

The main aim of the survey is to investigate the behavior, satisfaction, expenditure and profile of international visitors to Georgia.

The survey's objectives are to identify/gather data on the Socio-economic profile of international visitors; Repeat visitation; Purpose of visit; Locations visited by visitors; Main interests of visitors; Accommodations utilized; Transportation utilized; Visitor expenditure; Information sources utilized; Satisfaction of facilities, attractions and services; Problems encountered; and Intentions to return.

### RESEARCH METHODOLOGY

In order to study the above mentioned goals and objectives quantitative and qualitative research methodologies were used.

As a first stage of the project, the ACT project team familiarized themselves with background reading related to tourism data collection methodologies, classifications and categories. During this stage, the ACT project team also conducted interviews with regional tourist industry experts.

The ACT project team the conducted qualitative data collection by interviewing international visitors who were leaving Georgia. Face to face interviews were conducted at each type of border checkpoint (land, airport, railway and port). Overall, 1,096 tourists were interviewed between August 26 and September 5, 2011, and the typical interview length was between 10-12 minutes.

The ACT project team applied a stratified systematic sample method with the border checkpoint type taken as stratification variable. The final sampling unit was a resident of foreign country aged 15 years and over. The table below presents the distribution of the interviews according to border checkpoint types:

Type	Border	Sample Size
Airport	Tbilisi Airport	265
Airport	Batumi Airport	50
Port	Port Batumi	44
Port	Port Poti	2
Railway	Railway Gardabani	21
Railway	Railway Sadakhlo	39
Land	Sadakhlo	162
Land	Sarpi	306
Land	Tsodna	50
Land	Red Bridge	157

Based on the methodology created with expert input, the survey data for Wave II was generalized for the period July - September 2011. The overall results of the survey, as well as the results according to purpose of visit and country of residence are provided.

Data according to purpose of visit – the survey results according to purpose of visit are analyzed separately for holiday/leisure/recreation visitors, those visiting friends/relatives and professional/business visits. Analysis for other purposes of visit is not listed separately due to the small sample size.

Data according to country of residence – survey results according to visitor citizenship are 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, Latvia, Lithuania, Kazakhstan, Kyrgyzstan, Poland, Romania, Slovakia, Turkmenistan, Ukraine and Uzbekistan.

In the category 'Other Europe' are grouped the following countries: Austria, Belgium, Croatia, Denmark, France, Germany, Greece, Israel, Italy, Netherlands, Spain, Switzerland and United Kingdom.

Those counties that were not grouped in any of the abovementioned country groups, due to the small sample, were consequently grouped as 'Other Counties'. These countries include: Argentina, Canada, China, India, Iran, Iraq, Japan, Korea, Lebanon, Mexico, South Africa, Syria, Thailand, United Arab Emirates and the USA.

## C. FINDINGS

### SOCIO-ECONOMIC PROFILE OF INTERNATIONAL VISITORS TO GEORGIA

**Country of Residence of International Visitors** - Please tell me, in which country do you currently live? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Armenia	32%	18%	7%	26%
Azerbaijan	20%	25%	25%	25%
Turkey	17%	35%	42%	21%
Russia	11%	12%	4%	11%
Poland	3%	0%	1%	2%
Iran	3%	0%	2%	2%
Ukraine	2%	2%	1%	2%
Germany	2%	2%	3%	2%
Israel	2%	0%	0%	1%
Italy	1%	2%	1%	1%
Greece	1%	2%	0%	1%
Czech Republic	1%	0%	1%	1%
USA	1%	0%	1%	1%
United Kingdom	0%	1%	2%	1%
France	0%	0%	4%	0.4%
Kazakhstan	0%	0%	1%	0.4%
Austria	0%	0%	0%	0.3%
Belarus	0%	0%	0%	0.2%
Estonia	0%	0%	0%	0.2%
Latvia	0%	0%	0%	0.2%
Romania	0%	1%	0%	0.2%
Other	2%	0%	6%	2.6%

**Citizenship of International Visitors** - What is your country of citizenship? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Armenia	32%	19%	7%	26%
Azerbaijan	17%	17%	24%	21%
Turkey	16%	25%	41%	18%
Russia	14%	8%	6%	11%
Georgia	4%	28%	0%	9%
Poland	3%	0.2%	1%	2%
Iran	3%	0%	3%	2%
Ukraine	2%	2%	0%	2%
Israel	2%	0%	0%	1%
Germany	1%	1%	3%	1%
Czech Republic	1%	0.2%	1%	1%
USA	1%	0.2%	2%	1%
France	0.3%	0.3%	3%	0.4%
Greece	0.3%	1%	1%	0.4%
Kazakhstan	0.4%	0%	1%	0.4%
United Kingdom	0.4%	0%	2%	0.4%
Austria	0.4%	0%	0%	0.3%
Italy	0.3%	0%	1%	0.3%
Belarus	0.3%	0%	0%	0.2%
Estonia	0.3%	0%	0%	0.2%
Latvia	0.2%	0%	0%	0.2%
China	0.1%	0%	3%	0.2%

**International Visitors - Age Groups** - Could you please tell me your age? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
15 - 17	2%	0%	0%	1%
18 - 24	16%	9%	3%	14%
25 - 34	31%	28%	42%	30%
35 - 44	27%	23%	35%	26%
45 - 54	18%	23%	17%	20%
55 - 64	7%	13%	4%	8%
65 and Above	1%	3%	0%	1%

**International Visitors - Age Groups** - Could you please tell me your age? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
15 - 17	1%	4%	2%	0%	1%	1%	3%
18 - 24	8%	18%	9%	15%	35%	11%	17%
25 - 34	31%	29%	31%	28%	34%	30%	34%
35 - 44	28%	19%	25%	32%	17%	22%	22%
45 - 54	22%	16%	23%	20%	9%	23%	15%
55 - 64	9%	12%	9%	4%	3%	11%	7%
65 and Above	2%	2%	1%	1%	1%	3%	1%

**International Visitors – Gender** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Male	60%	62%	90%	64%
Female	40%	38%	10%	37%

**International Visitors – Gender** - *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Male	80%	48%	57%	69%	51%	51%	67%
Female	20%	52%	43%	31%	49%	49%	33%

**Employment Status of International Visitors** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Hired Employee	53%	37%	38%	48%
Self-employed	9%	25%	28%	14%
Owner of a Business which Employs Others	6%	8%	26%	8%
Student	10%	5%	0%	8%
Housewife/Unpaid Family Worker	8%	7%	0%	8%
Unemployed	5%	7%	0%	5%



Pensioner/Retired	2%	4%	0%	2%
Volunteer	0%	0%	0%	0%
Other	1%	0%	0%	1%
Refused to Answer	6%	7%	7%	6%

**Employment Status of International Visitors - (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Hired Employee	45%	40%	51%	50%	47%	60%	41%
Self-employed	32%	15%	6%	7%	9%	14%	18%
Owner of a Business which Employs Others	7%	11%	7%	12%	3%	3%	9%
Student	3%	10%	5%	7%	29%	14%	17%
Housewife/Unpaid Family Workers	0%	6%	15%	10%	3%	2%	2%
Unemployed	1%	5%	8%	6%	4%	1%	4%
Pensioner/Retired	2%	5%	3%	2%	1%	4%	5%
Volunteer	0%	0%	0%	0%	0%	1%	0%
Other	0%	2%	1%	0%	1%	0%	1%
Refused to Answer	10%	8%	4%	7%	3%	2%	4%

**Percentage of International Visitors with Georgian Ancestry - Do you have Georgian ancestry? (By purpose of visit)**

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	13%	30%	26%	16%
No	87%	70%	74%	84%

**Percentage of International Visitors with Georgian Ancestry - Do you have Georgian ancestry? (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	22%	47%	3%	8%	16%	30%	11%
No	78%	53%	97%	92%	84%	70%	89%

## EXPERIENCE OF VISITING GEORGIA

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	36%	9%	21%	29%
2-3 Times	20%	8%	6%	16%
4-5 Times	8%	3%	8%	7%
6-10 Times	7%	11%	8%	8%
11 Times or More	29%	69%	57%	41%
Average Number of Visits	2 <sup>2</sup>	7	10	2

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	29%	27%	18%	17%	63%	53%	72%
2-3 Times	11%	22%	24%	11%	16%	7%	15%
4-5 Times	6%	6%	12%	5%	3%	2%	3%
6-10 Times	9%	11%	8%	6%	5%	12%	6%
11 Times or More	44%	34%	38%	61%	13%	26%	5%
Average Number of Visits	3	2	2	2	1	1	1

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1st November 2010? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	69%	40%	30%	59%
2-3 Times	21%	20%	24%	21%
4-5 Times	2%	18%	3%	6%
6-10 Times	6%	12%	0%	8%

<sup>2</sup> Median Average

11 Times or More	2%	10%	43%	5%
Average Number of Visits	1	2	3	1

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1<sup>st</sup> November 2010? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	37%	70%	66%	50%	82%	80%	86%
2-3 Times	15%	26%	25%	26%	17%	16%	9%
4-5 Times	12%	2%	5%	7%	1%	2%	3%
6-10 Times	22%	1%	3%	7%	1%	3%	2%
11 Times or More	14%	0%	1%	9%	1%	0%	0%
Average Number of Visits	3	1	1	1	1	1	1

## DESCRIPTION OF CURRENT VISIT TO GEORGIA

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
1 Day	8%	12%	31%	11%
2-3 Days	17%	31%	22%	23%
4-5 Days	14%	7%	12%	12%
6-7 Days	9%	7%	5%	8%
8-14 Days	31%	19%	15%	26%
15-20 Days	8%	7%	8%	7%
21-30 Days	7%	9%	1%	7%
31 Days or More	6%	8%	7%	7%
Average Duration of Stay (Days)	8	5	3	7

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe
1 Day	35%	0%	3%	10%	3%	4%
2-3 Days	33%	8%	18%	36%	9%	6%
4-5 Days	4%	13%	13%	16%	8%	4%
6-7 Days	5%	10%	9%	6%	6%	11%
8-14 Days	11%	23%	47%	14%	32%	34%
15-20 Days	7%	13%	6%	4%	17%	13%
21-30 Days	2%	13%	4%	8%	16%	15%
31 Days or More	2%	20%	2%	8%	9%	13%
Average Duration of Stay (Days)	2	14	8	4	12	13

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
With Immediate Family Members (spouse, children under 18)	35%	20%	3%	29%
With Friends	29%	29%	22%	29%
Alone	19%	41%	68%	26%
With Extended Family (relatives, parents)	18%	10%	0%	15%
Member of a Tour Group	1%	0%	0%	1%
With Colleagues/Co-workers	1%	0%	8%	1%

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
With Immediate Family Members (spouse, children under 18)	6%	28%	53%	32%	22%	14%	15%
With Friends	46%	16%	19%	26%	44%	26%	41%
Alone	34%	43%	13%	21%	26%	50%	22%
With Extended Family (relatives, parents)	12%	14%	19%	20%	6%	6%	16%
Member of a Tour Group	1%	0%	0%	0%	2%	3%	6%
With Colleagues/Co-workers	1%	0%	0%	0%	1%	2%	2%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Did not Spend the Night	5%	10%	7%	8%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	39%	10%	55%	33%

Private Home of a Friend or Relative (non-paid accommodation)	22%	51%	22%	28%
Personal Home/Apartment - (non-paid accommodation)	8%	25%	4%	11%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	12%	1%	1%	8%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	11%	1%	4%	8%
Rented House/Apartment - tourist rents the entire property	5%	1%	5%	4%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	4%	1%	0%	4%
Campsite, Caravan site or trailer park (providing some tourist services – shop, information, recreation activities)	2%	0%	4%	2%
Secondary Residence - summer house	1%	2%	0%	1%
Health-related Establishments – Sanatoriums, thermal resorts, spas etc.	0%	0%	0%	1%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	1%	0%	0%	0%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Did not Spend the Night	20%	0%	3%	10%	2%	3%	2%
Hotel (and similar	33%	15%	30%	38%	30%	39%	70%

establishments providing hotel services including more than daily bed-making and cleaning of the room)							
Private Home of a Friend or Relative (non-paid accommodation)	22%	57%	21%	37%	21%	15%	8%
Personal Home/Apartment - (non-paid accommodation)	16%	18%	7%	6%	10%	26%	7%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	3%	6%	5%	1%	35%	33%	13%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	1%	0%	29%	1%	3%	1%	2%
Rented House/Apartment - tourist rents the entire property	1%	0%	5%	6%	8%	4%	7%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	7%	7%	1%	1%	13%	3%	1%
Campsite, Caravan site or trailer park (providing some tourist services – shop, information, recreation activities)	1%	1%	0%	0.4%	10%	7%	0%
Health-related Establishments – Sanatoriums, thermal resorts, spas etc.	0%	0%	1%	2%	0%	0%	0%
Secondary Residence - summer house	0%	2%	1%	2%	4%	1%	0%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	0%	0%	0%	0%	2%	3%	0%

**Means of Transport Used for Arrival** - Please tell me, with which means of transport did you arrive in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Private Vehicle	42%	22%	43%	37%
Bus/Minibus	27%	50%	19%	33%
Foreign Airline	14%	11%	25%	14%
Georgian Airways/Airzena	4%	7%	5%	5%
Train	5%	2%	7%	4%
Rented Vehicle	4%	4%	2%	4%
Public Vessel – Yacht/Ship/Ferry/Boat	2%	4%	0%	2%
Bicycle	0%	0%	0%	0%

**Means of Transport Used for Arrival** - Please tell me via, with which means of transport did you arrive in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Private Vehicle	35%	13%	65%	44%	3%	5%	3%
Bus/Minibus	51%	14%	22%	46%	13%	20%	47%
Foreign Airline	5%	39%	0.3%	2%	48%	52%	33%
Georgian Airways/Airzena	0%	13%	1%	0%	20%	20%	9%
Train	1%	1%	11%	4%	2%	2%	2%
Rented Vehicle	8%	10%	1%	4%	1%	0%	4%
Public Vessel – Yacht/Ship/Ferry/Boat	1%	10%	1%	0%	12%	1%	0%
Bicycle	1%	0%	0%	0%	1%	1%	1%



## MAIN PURPOSE AND MAJOR INTERESTS IN TRAVELING TO GEORGIA

**Main Purpose of Visit** - Please tell me, what was the main purpose of your current visit to Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other	Total
Holiday, Leisure, Recreation	57%	74%	83%	53%	84%	70%	86%	68%
Visiting Relatives	12%	19%	8%	17%	5%	18%	1%	13%
Visiting Friends	22%	3%	5%	3%	4%	3%	1%	8%
Business or Professional	7%	1%	1%	3%	2%	6%	7%	3%
Buying Goods with the Aim of Resale	1%	3%	1%	7%	0%	0%	0%	2%
Transit on the Way to Another Country	1%	0%	1%	4%	2%	3%	1%	2%
Shopping, Buying Goods with the Aim of Consumption	0%	0%	0%	6%	1%	0%	0%	2%
Health and Medical Care	0%	0%	0%	4%	0%	0%	0%	1%
Personal Reason	0%	0%	1%	2%	0%	0%	1%	1%
Education or Trainings	0%	0%	1%	1%	1%	0%	2%	1%
Employment	1%	0%	0%	0%	2%	0%	2%	1%
Visit to Second Home	0%	0%	0%	0%	0%	1%	0%	0.1%
Religion or Pilgrimage	0%	0%	0%	0%	0%	0%	1%	0%

**Medical Treatment in Georgia** - You have mentioned that the purpose of your visit to Georgia was for medical or health reasons. Could you please tell me what type of treatment or surgery you have received and where? *(Overall picture)*

	N	Location
Recovery/Rehabilitation	4 respondents	Borjomi, Kutaisi, Sairme, Tskhaltubo - 1 respondent each
Medical Examination (analysis, x-ray, ultrasound, tomography, etc.)	2 respondents	Tbilisi, Marneuli – 1 respondent each
Childbirth/Hysterectomy/Gynecological	1 respondent	Marneuli - 1 respondent
Consultation with Physician	1 respondent	Tbilisi – 1 respondent
Total	8 respondents	

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*International visitors with leisure/recreation/vacation purpose N=772*)

Yes	8.5%
No	91.5%

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*By country of residence for international visitors with leisure/recreation/vacation purpose N=772*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	3%	6%	9%	13%	14%	6%	7%
No	97%	94%	91%	87%	86%	94%	93%

**Employment in Georgia** - Concerning your employment, are/were you being paid by a resident Georgian company, the Georgian Government or foreign business registered in Georgia? (*International tourists with employment purpose of visit*)

Yes	1 resp.
No	2 resp.
Refused to Answer	31 resp.
Total	34 resp.

**MICE Tourism** - Was your primary reason for visiting Georgia on this trip any of the following? (*International tourists with business or professional purpose of visit N=52*)

Corporate/Business Meeting, Seminar, Workshop or Presentation	15%
Conference, Congress, Forum	8%
I Have not Participated in any Type of Event	77%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	0%	21%	11%	7%
Experiencing Georgia's Nature/Scenery/Landscape	77%	42%	61%	67%
Rest and Relaxation	71%	53%	41%	63%
Tasting Georgian Cuisine	58%	48%	32%	53%
Tasting Georgian Wine	44%	39%	22%	41%
Visiting Georgia's Historical Sites	41%	29%	22%	35%
Exploring Georgia's Architecture	33%	20%	19%	27%
Experiencing Georgian Hospitality	20%	22%	12%	20%
Experiencing Georgia's Nightlife and Entertainment	17%	19%	10%	15%
Shopping	10%	15%	9%	12%
Experiencing Georgia's Culture and Folklore	12%	17%	6%	12%
Undertaking Outdoor Adventurous Activities	7%	13%	6%	8%
I Don't Know / Hard to Answer	0%	0%	2%	0%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	4%	1%	5%	14%	4%	6%	3%
Experiencing Georgia's Nature/Scenery/ Landscape	66%	73%	74%	56%	77%	58%	72%
Rest and Relaxation	56%	69%	67%	65%	54%	58%	67%
Tasting Georgian Cuisine	32%	63%	67%	57%	55%	48%	40%
Tasting Georgian Wine	31%	49%	49%	38%	44%	43%	24%
Visiting Georgia's	25%	52%	50%	11%	50%	45%	38%

Historical Sites							
Exploring Georgia's Architecture	21%	34%	43%	6%	42%	32%	28%
Experiencing Georgian Hospitality	15%	24%	11%	24%	32%	29%	26%
Experiencing Georgia's Nightlife and Entertainment	31%	15%	9%	6%	19%	14%	32%
Shopping	14%	11%	3%	23%	14%	7%	8%
Experiencing Georgia's Culture and Folklore	17%	11%	9%	3%	34%	19%	22%
Undertaking Outdoor Adventurous Activities	14%	3%	5%	2%	20%	16%	8%
I Don't Know / Hard to Answer	0%	0%	0%	1%	1%	1%	0%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	1%	21%	9%	6%
Experiencing Georgia's Nature/Scenery/ Landscape	75%	35%	59%	64%
Rest and Relaxation	70%	42%	40%	59%
Tasting Georgian Cuisine	58%	33%	34%	50%
Tasting Georgian Wine	45%	29%	27%	39%
Visiting Georgia's Historical Sites	39%	18%	20%	31%
Exploring Georgia's Architecture	31%	11%	22%	24%
Experiencing Georgian Hospitality	20%	12%	16%	18%
Experiencing Georgia's Nightlife and Entertainment	16%	14%	17%	14%
Shopping	9%	8%	8%	11%
Experiencing Georgia's Culture and Folklore	11%	5%	11%	9%
Undertaking Outdoor Adventurous Activities	6%	2%	9%	5%
I Don't Know / Hard to Answer	0%	0%	2%	0%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	5%	1%	5%	13%	4%	5%	3%
Experiencing Georgia's Nature/Scenery/Landscape	55%	72%	73%	55%	76%	57%	69%
Rest and Relaxation	45%	69%	66%	63%	52%	51%	66%
Tasting Georgian Cuisine	16%	65%	67%	56%	54%	50%	41%
Tasting Georgian Wine	23%	50%	49%	36%	45%	44%	31%
Visiting Georgia's Historical Sites	14%	50%	49%	11%	48%	41%	35%
Exploring Georgia's Architecture	13%	32%	42%	6%	38%	29%	28%
Experiencing Georgian Hospitality	7%	22%	11%	24%	33%	29%	25%
Experiencing Georgia's Nightlife and Entertainment	27%	13%	9%	6%	20%	14%	31%
Shopping	4%	15%	4%	21%	14%	11%	12%
Experiencing Georgia's Culture and Folklore	7%	11%	9%	3%	30%	16%	21%
Undertaking Outdoor Adventurous Activities	3%	1%	5%	2%	20%	13%	6%
I Don't Know/Hard to Answer	0.2%	0.1%	0%	1%	2%	1%	0%

**Popular Locations** - Please tell me which locations, sites and/or attractions you visited in Georgia during this visit? *(Overall picture)*

	%	Average Number of Nights
Batumi (Kvariati, Botanical Garden, Gonio Fortress)	51%	2
Tbilisi	45%	2
Kobuleti	14%	7
Ureki	7%	5
Kutaisi (Gelati Monastery, Bagrat's Cathedral, Tskaltubo Caves)	6%	2
Rustavi	5%	1
Mtskheta (Svetitskhoveli Cathedral, Jvari Monastery, Armazi Fortress, Samtavro, Pompey's Bridge)	5%	0
Kazbegi (Gergeti Trinity Church)	5%	2
Marneuli	4%	4

Borjomi (Likani, Mineral waters, Green Monastery, Timotesubani, National Park)	4%	1
Gori (Stalin's Museum, Gori Fortress)	4%	1
Mestia & Ushguli	3%	3
Bolnisi (Bolnisi Sioni Church)	3%	6
Sighnaghi (Bodbe Monastery)	3%	0
Zugdidi (Dadiani's Palace)	2%	1
Lagodekhi (National Park)	2%	1
Telavi (King Erekle's Museum and Palace, Tsinandali Palace)	2%	n/a
Dmanisi (Dmanisi Museum- Archeological Monument)	2%	n/a
Gardabani	2%	n/a
Vardzia (Vanis Kvabebi, Sapara, Khertvisi)	2%	n/a
Ananuri (Church and Zhinvali Reservoir)	1%	n/a
Tusheti	1%	n/a
David Gareja	1%	n/a
Bakuriani (Kokhtagora, Didveli)	1%	n/a
Poti	1%	n/a
Uplistsikhe	1%	n/a
Anaklia	1%	n/a
Gudauri	1%	n/a
Shatili & Muco	1%	n/a
Other Kakheti	2%	n/a
Other Imereti	2%	n/a
Other Samegrelo - Zemo Svaneti	1%	n/a

## EXPENDITURE DURING TRAVEL IN GEORGIA

### Expenditure Structure

Total Number of Visitors	960,307
Total Expenditure	GEL 683,738,584
Expenditure per Visitor	GEL 712

### Expenditures by Purpose of Visit

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Leisure / Recreation / Vacation	68%	GEL 521,754,191	653,009	GEL 799
Visiting Friends and Relatives	20%	GEL 97,374,927	192,061	GEL 507
Business or Professional	3%	GEL 29,269,944	28,809	GEL 1,016
Other	9%	GEL 35,339,522	86,428	GEL 409

**Expenditure on Services** - Please tell me how much you have spent on the items listed during this visit to Georgia (excluding those services included in the tour package)?

	Total Expenditure	Share of Total Expenditure
Served Food and Drinks	GEL 198,284,189	29%
Accommodation	GEL 123,072,945	18%
Shopping	GEL 75,211,244	11%
Cultural and Entertainment Services	GEL 61,536,473	9%
Domestic Ground Transportation	GEL 54,699,087	8%
Sports and Recreational Services	GEL 41,024,315	6%
Tour Package	GEL 34,186,929	5%
Medical Services	GEL 6,837,386	1%
Other Expenditure	GEL 88,886,016	13%

## ORGANIZER OF VISITS TO GEORGIA AND INFORMATION SOURCES ABOUT GEORGIA

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Myself	79%	82%	62%	80%
Family Members/Friends	18%	17%	0%	16%
Foreign Travel Agency/ Tour Operator	2%	0%	2%	2%
My Business/Company	1%	1%	35%	2%
Georgian-based Travel Agency/Tour Operator	1%	0%	0%	0.4%

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Myself	89%	87%	71%	80%	83%	80%	75%
Family Members/Friends	8%	13%	27%	19%	11%	4%	10%
Foreign Travel Agency/ Tour Operator	0%	0%	1%	1%	2%	9%	8%
My Business/Company	3%	1%	1%	1%	3%	4%	3%
Georgian-based Travel Agency/Tour Operator	1%	0%	0%	0%	1%	3%	2%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Friends & Relatives	43%	23%	27%	35%
Previous Visit	34%	46%	24%	35%
Internet	12%	2%	13%	9%
Television/Radio	7%	2%	0%	5%
Travel Guidebook	5%	0.2%	1%	3%
Newspaper/Magazine	3%	1%	0%	2%
Organization/Business Partner	0%	1%	17%	1%



Travel Agency/Tour Operator	1%	0%	0%	1%
Specialized Tourism, Travel or Special Interest Magazine	1%	0%	1%	1%
Georgian Embassy/Consulate	0%	0%	0%	0.3%
Travel Fairs	0%	0%	0%	0.3%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0%	0%	0%	0.1%
Books	0%	0%	2%	0.1%
I Don't Remember	18%	31%	25%	24%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Friends & Relatives	38%	42%	39%	21%	54%	33%	49%
Previous Visit	36%	38%	53%	26%	18%	25%	7%
Internet	9%	8%	0%	1%	38%	27%	35%
Television/Radio	2%	0%	12%	1%	9%	2%	14%
Travel Guidebook	2%	1%	0%	0%	13%	20%	13%
Newspaper/Magazine	1%	0%	6%	0%	4%	1%	3%
Organization/Business Partner	2%	0%	0%	1%	2%	2%	6%
Travel Agency/Tour Operator	0%	0%	0%	0%	1%	5%	8%
Specialized Tourism, Travel or Special Interest Magazine	1%	0%	1%	0%	3%	2%	0%
Georgian Embassy/Consulate	0%	0%	0%	0%	3%	1%	0%
Travel Fairs	0%	0%	0%	0%	2%	2%	2%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0%	0%	0%	0%	0%	1%	0%
Books	0%	0%	0%	0%	0%	1%	0%
I Don't Remember	17%	19%	14%	52%	7%	21%	7%

**Websites and Portals Used to Obtain Information on Georgia** - Please tell me from which travel-related websites you obtained information about Georgia? (*Overall picture – N= 162*)

I cannot recall any specific website	41%	www.worldtravelguide.com	2%
www.lonelyplanet.com	24%	www.museum.ge	2%
www.georgia.travel	20%	www.georgia.ge	1%
www.wikitravel.com	11%	www.svaneti.com	1%
www.kaukaz.pl	8%	www.lametarek.co.il	1%
www.tripadvisor.com	7%	www.inliberty.ru	1%
www.lametayel.co.it	4%	www.svanetitreking.ge	1%
www.info-tbilisi.ge	4%	www.hitchwiki.org	1%
www.expedia.com	3%	www.marriot.com	0.4%
www.map.ge	3%	www.radisson.com	0.4%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	4%	3%	10%	4%
No	96%	97%	90%	96%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	2%	8%	0%	0%	19%	17%	5%
No	98%	92%	100%	100%	81%	83%	95%

**Train Tickets** - Please tell me whether your train tickets were purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0.5%	0%	3.2%	0.5%
No	99.5%	100%	96.8%	99.5%

**Train Tickets** - Please tell me whether your train tickets were purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	1%	1%	0%	2%	1%	2%
No	100%	99%	99%	100%	99%	100%	98%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	2%	0%	3%	1%
No	98%	100%	97%	99%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	1%	0%	1%	1%	6%	4%	2%
No	99%	100%	99%	100%	94%	96%	98%

**Tour Package** - Please tell me whether your tour package was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0%	0%	1%	0%
No	100%	100%	99%	100%

**Tour Package** - Please tell me whether your tour package was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	1%	1%	0%
No	100%	100%	100%	100%	100%	99%	100%

## PROBLEMS ENCOUNTERED IN GEORGIA

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I have not Encountered any Problems	77%	92%	77%	81%
Transportation (roads/traffic)	5%	3%	11%	5%
Public Toilets	5%	1%	2%	4%
Foreign Language Capacity	4%	3%	4%	3%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	3%	2%	2%	3%
Poor Service in Restaurants/Food Spots	3%	2%	1%	2%
Navigation/Road Signs/Interpretation	3%	1%	0%	2%
Untidy/Dirty Streets, Parks, Squares	2%	0%	4%	2%
Information on Transport Timetables and Destinations	2%	1%	0%	2%
Lack of Tourist Maps	2%	1%	0%	2%
Poor Service in Hotels/Guesthouses	2%	1%	1%	1%
Lack of Tourism Informational Centers/Points	2%	1%	4%	1%
Border Crossing	2%	1%	0%	1%
Lack of Foreign Language Menus	1%	1%	3%	1%
Cuisine	1%	1%	3%	1%
Sanitary Conditions in Hotels and Restaurants	1%	1%	0%	1%
Other	3%	5%	9%	1%

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I have not Encountered any Problems	87%	78%	79%	85%	72%	71%	70%
Transportation (roads/traffic)	5%	6%	2%	4%	9%	8%	8%
Public Toilets	2%	5%	2%	1%	10%	10%	11%
Foreign Language Capacity	4%	1%	0%	1%	9%	15%	11%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	2%	1%	3%	3%	4%	6%	2%
Poor Service in Restaurants/Food Spots	1%	4%	4%	2%	2%	1%	4%
Navigation/Road Signs/Interpretation	1%	0%	5%	0%	4%	3%	2%
Untidy/Dirty Streets, Parks, Squares	1%	3%	1%	1%	4%	4%	2%
Information on Transport Timetables and Destinations	2%	4%	0%	1%	6%	3%	0%
Lack of Tourist Maps	1%	4%	0%	1%	2%	7%	4%
Poor Service in Hotels/Guesthouses	2%	0%	1%	2%	1%	2%	1%
Lack of Tourism Informational Centers/Points	1%	3%	0%	1%	3%	5%	
Border Crossing	1%	0%	0%	4%	2%	2%	1%
Lack of Foreign Language Menus	1%	3%	0%	0%	3%	3%	3%
Cuisine	1%	0%	0%	2%	2%	0%	0%
Sanitary Conditions in Hotels and Restaurants	1%	1%	0%	1%	1%	3%	0%
Other	2%	7%	8%	1%	7%	16%	7%

## SATISFACTION FROM THE TRIP TO GEORGIA AND PLANS FOR A FUTURE VISIT

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Very Satisfied	69%	73%	78%	71%
Satisfied	30%	22%	22%	27%
Dissatisfied	1%	2%	0%	1%
I Don't Know/Hard to Answer	0%	2%	0%	1%
Average Satisfaction	3.7	3.7	3.9	3.7

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Very Satisfied	74%	73%	48%	94%	73%	76%	59%
Satisfied	22%	26%	51%	5%	24%	21%	37%
Dissatisfied	1%	2%	1%	1%	1%	3%	2%
I Don't Know/Hard to Answer	3%	0%	1%	0%	1%	1%	2%
Average Satisfaction	3.8	3.7	3.5	3.9	3.7	3.7	3.6

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Environment/Landscape of Georgia	3.8	3.8	3.8	3.8
Historical and Cultural Heritage	3.7	3.9	3.9	3.8
Georgian Hospitality	3.7	3.8	3.8	3.7

Georgian Wine	3.7	3.8	3.9	3.7
Georgian Cuisine	3.7	3.8	3.7	3.7
Value for Money	3.5	3.6	3.3	3.5
Guesthouse/B&B Facilities and Service	3.4	3.5	3.6	3.5
Restaurant Facilities and Service	3.4	3.7	3.6	3.4
Travel Agency/Tour Operator Service	3.4	3.3	3.3	3.4
Hotel Facilities and Services	3.4	3.3	3.4	3.4
Tourism Informational Center Service	3.3	3.6	3.5	3.4
Transport Services/Infrastructure	3.2	3.4	2.9	3.3

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? **USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Environment/Landscape of Georgia	3.9	3.9	3.5	4.0	3.9	3.8	3.7
Historical and Cultural Heritage	3.9	3.8	3.5	4.0	3.8	3.8	3.8
Georgian Hospitality	3.7	3.8	3.5	3.9	3.9	3.9	3.7
Georgian Wine	3.8	3.8	3.5	3.9	3.8	3.7	3.7
Georgian Cuisine	3.7	3.9	3.5	3.9	3.8	3.8	3.5
Value for Money	3.6	3.4	3.3	3.8	3.1	3.2	3.4
Guesthouse/B&B Facilities and Service	3.5	3.2	3.6	3.9	3.5	3.3	3.4
Restaurant Facilities and Service	3.5	3.6	3.3	3.5	3.4	3.5	3.3
Travel Agency/Tour Operator Service	3.6	3.9	3.5	3.7	3.0	3.2	3.0
Hotel Facilities and Services	3.4	3.6	3.4	3.4	3.3	3.3	3.2
Tourism Informational Center Service	3.7	3.6	3.5	3.4	3.1	3.2	3.1
Transport Services/Infrastructure	3.0	3.3	3.3	3.5	3.1	3.0	3.0



**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	92%	97%	84%	93%
Maybe	7%	3%	15%	7%
No	1%	0%	1%	1%

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	94%	99%	96%	96%	78%	78%	77%
Maybe	5%	1%	4%	4%	22%	19%	21%
No	1%	0.1%	1%	1%	0%	3%	3%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	95%	93%	87%	94%
Maybe	4%	6%	13%	5%
No	1%	1%	0%	1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	95%	97%	94%	95%	93%	91%	83%
Maybe	4%	3%	5%	3%	5%	8%	15%
No	1%	0%	1%	2%	2%	1%	2%

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# INTERNATIONAL VISITOR SURVEY – WAVE III REPORT

FINAL

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# **INTERNATIONAL VISITOR SURVEY – WAVE III REPORT**

FINAL

USAID ECONOMIC PROSPERITY INITIATIVE (EPI)

CONTRACT NUMBER: AID-114-C-10-00004

DELOITTE CONSULTING LLP

USAID/CAUCASUS

MONDAY, SEPTEMBER 17, 2012

## **DISCLAIMER:**

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# DATA

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# ABSTRACT

ACT Research prepared this Third Wave International Visitor Survey Report for Deloitte Consulting LLP in the framework of USAID-funded Economic Prosperity Initiative (EPI). The report represents the period October to December 2011.

The research was undertaken to create an annual set<sup>1</sup> of visitor surveys based on statistically valid templates and methodologies. The data produced is necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU - Eurostat) and United Nations World Tourism Organization (UNWTO) obligations.

Face to face interviews were conducted at a variety of border-crossing points (road, airport, port and railway) with 1037 international visitors leaving Georgia between November 30 and December 19, 2011.

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<sup>1</sup> Surveys are undertaken quarterly

# ABBREVIATIONS/DEFINITIONS

ACT	ACT Research (Market Research & Consulting Company)
EPI	Economic Prosperity Initiative
EU	European Union
GDP	Gross Domestic Product
GEL	Georgian Currency - the Lari
GNTA	Georgian National Tourism Administration
MICE	Meetings, Incentives, Conferences & Exhibitions
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
Formal information sources	Information acquired from internet, media, tourist agencies etc.
Informal information sources	Information acquired from relatives, friends, and colleagues - word of mouth
Holiday-makers	Leisure, recreation or vacation tourists.
Neighboring countries	Turkey, Russia, Azerbaijan and Armenia
Tourist	A visitor who stays at least one night in a collective or private accommodation in the place/country visited.
Visitor	Any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.
Word of Mouth	Information received from friends, relatives, colleagues or other persons

# CONTENTS

- I. EXECUTIVE SUMMARY ..... 1
- II. APPENDICES..... 4
  - A. BACKGROUND ..... 5
  - B. METHODOLOGY ..... 6
  - C. FINDINGS..... 8



# I. EXECUTIVE SUMMARY

The International Visitor Survey was conducted to examine the behavior, satisfaction, expenditure and profile of international visitors to Georgia. This document reports on the third in a series of five quarterly international visitor surveys.

The survey results indicated that the socio-economic profile of the typical international visitor is a 25-34 year old (30%) self-employed (37%) male (76%). Most international visitors are residents of Georgia's neighboring countries; Turkey (29%), Azerbaijan (26%), Armenia (24%) and Russia (10%). Only 11% of international visitors surveyed were of Georgian descent, and came predominantly from Russia (32%) and 'Other Europe' (34%).

Between October and December 2011, only 16% of visitors were visiting Georgia for the first time. Of these tourists, 50% visited Georgia for leisure/recreation/vacation purposes while 26% traveled for business and 9% came to see friends and relatives.

The survey results indicated that the average international visitor traveled to Georgia three times, although this number varied according to the purpose of visit. For example, visitors traveling to see friends and relatives made an average of five trips, business visitors travelled twice on average, and holiday makers travelled to Georgia only once on average.

Georgia hosted residents of neighboring countries more often than visitors from other countries. For instance, Azeri and Turkish residents made an average of ten trips, Armenians visited an average of three times, and Russian visitors travelled twice on average, while travelers from all other countries stayed only once on average.

Based upon the survey data, most visitors (68%) organized their own travel; only 1% used a travel agency. In general, the use of a travel agency to organize travel to Georgia was quite low among all visitors regardless of country of residence.

In order to plan their visits, visitors relied on a variety of information sources such as 'word of mouth'. For example, 24% of international visitors obtained information via 'word of mouth' from their friends and relatives, while 72% relied on data gathered from previous visits.

In addition to information gained via 'word of mouth', visitors from Central and Eastern, and 'Other Countries' also relied on the Internet for information about Georgia. The most popular Internet websites among international visitors were [www.georgia.travel](http://www.georgia.travel), [www.lonelyplanet.com](http://www.lonelyplanet.com) and [www.wikitravel.com](http://www.wikitravel.com). However, the Internet was not often used to book travel arrangements; only 3% of international visitors booked air tickets online and only 0.3% booked accommodation online.

The majority of international visitors (64%) travelled alone, 16% were accompanied by family members, and an additional 16% travelled with friends. In general, visitors traveling on business visited Georgia alone (60%), or with colleagues and co-workers (22%).

Most international visitors (81%) used land transportation, such as private vehicles and minibuses, to travel to Georgia. However, 14% of international visitors arrived by plane, 3% arrived by train and 1% used a ship or public vessel.

The survey data demonstrated that 31% of international visitors did not pay for accommodation; 21% stayed with relatives and/or friends and 10% stayed in a personal home or second home.

However, 20% of international visitors spent a night in a hotel and this accommodation was most popular among those from 'Other Countries' (47%), Central and Eastern Europe (38%) and 'Other Europe' (40%). Also, 70% of visitors who travelled for business and professional reasons stayed at hotels.

The survey data indicated that 30% of international visitors came to Georgia to see family and friends, while 14% travelled for leisure/recreation/vacation purposes. Only 9% of visitors traveled on business; other purposes such as purchasing goods with the intention of resale and shopping totaled 28%. 17% of visitors were transiting the country.

International visitors traveling in Georgia were interested in the following experiences: tasting Georgian cuisine (30%), shopping (24%), rest and relaxation (19%), and tasting Georgian wine (17%). Those interested in shopping were predominantly residents of Armenia (37%) and Azerbaijan (26%) while visitors from Russia, 'Other Countries' and 'Other Europe' were eager to taste Georgian Cuisine (65%, 63% and 62% respectively) and Georgian wine (43%, 42% and 58% respectively).

The most popular city was Tbilisi, hosting 44% of international visitors, while 22% also visited Batumi. In addition, 10% of international visitors traveled to Marneuli and 7% to Rustavi.

Between October and December 2011, a total of 754,547 international visitors traveled to Georgia and spent GEL 365,995,295 with an average expenditure per tourist of GEL 485. International visitors traveling for business had the highest average expenditure with an average of GEL 1,075 GEL spent per visitor. Holiday makers spent an average of GEL 405 per capita, while visitors visiting friends and relatives normally didn't spend more than GEL 464 GEL per person on average.

International visitors generated revenues in the following sectors: a) restaurants, food and beverage – GEL 109,786,589; b) hotels and accommodation – GEL 36,595,530; c) shopping – GEL 65,871,953; and d) domestic ground transportation -GEL 65,871,953.

The visitors surveyed were asked to rate their experiences on a '4 Point Scale' where '1' indicates extreme dissatisfaction and '4' represents great satisfaction. Visitors rated Georgia well overall (score of 3.6) with the least satisfied travelling on business. In general, visitors from 'Other Europe' and Azerbaijan gave the best ratings (3.8 and 3.7 respectively), while those from Armenia and the Central and Eastern Europe were less satisfied with ratings of 3.5 each. The following attractions received the best ratings: Georgian nature (3.8), historical and cultural heritage (3.8) and Georgian wine (3.8).

While the majority (81%) of visitors reported not encountering any problems during their visit, some faced problems with transportation, traffic and roads (7%) as well as public toilets (7%). In addition, 4% of tourists experienced issues with the foreign language capacity in Georgia, and 3% of people complained about high prices.

Visitors surveyed gave the lowest ratings for Georgian infrastructure and transport services customer service at travel agencies, and general value for money.

The vast majority of visitors (88%) displayed an interest in visiting Georgia again while those from Central and Eastern Europe were slightly less interested in returning than other groups.

The majority of visitors (78%) would recommend Georgia to friends and relatives although residents of 'Other Europe' (90%), Azerbaijan (85%) and Turkey (82%) were slightly more likely to recommend the country.

## **II. APPENDICES**

- A. BACKGROUND**
- B. METHODOLOGY**
- C. FINDINGS**

## A. BACKGROUND

Tourism is a priority sector for EPI, and wine tourism and MICE tourism are priority value chains. A solid understanding of tourist behavior has been a significant factor in the success of many countries that have built tourism into a strong Gross Domestic Product (GDP) contributor. Such data is fundamental to sound policy formulation. However, simply measuring the contribution of tourism to the national economy is not enough. EPI's value chain assessment process and other research have pinpointed several important issues:

- Until recently, there has been limited availability of useful tourist data;
- The Georgian National Tourism Administration (GNTA) has undertaken tourism surveys in the past that have been neither comprehensive nor consistent in the methodology used.
- Georgia's tourism sector directly comprises suppliers of tourism products and services, tourist attractions, government entities, educational institutions and private sector associations. To build a complete picture of the tourism industry and define specific policy initiatives, it is critical to obtain and analyze data from many of these individuals and organizations. It is equally important for all of these value chain actors to benefit from a transparent tourism information system that can underpin broad input to policy making and enable better planning and implementation in all segments of society that are involved in the success of Georgian tourism.

GNTA and EPI are, in partnership, undertaking an annual visitor survey based on statistically valid methodologies that would produce the data necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU) and United Nations World Tourism Organization (UNWTO) obligations. The survey data collected will also be used for EPI Performance Monitoring purposes.

## B. METHODOLOGY

The main aim of the survey is to investigate the behavior, satisfaction, expenditure and profile of international visitors to Georgia.

The survey's objectives are to identify/gather data on the Socio-economic profile of international visitors; Repeat visitation; Purpose of visit; Locations visited by visitors; Main interests of visitors; Accommodations utilized; Transportation utilized; Visitor expenditure; Information sources utilized; Satisfaction of facilities, attractions and services; Problems encountered; and Intentions to return.

### RESEARCH METHODOLOGY

In order to study the above mentioned goals and objectives quantitative and qualitative research methodologies were used.

As a first stage of the project, the ACT project team familiarized themselves with background reading related to tourism data collection methodologies, classifications and categories. During this stage, the ACT project team also conducted interviews with regional tourist industry experts.

The ACT project team conducted qualitative data collection by interviewing international visitors who were leaving Georgia. Face to face interviews were conducted at each type of border checkpoint (land, airport, railway and port). Overall, 1,037 tourists were interviewed between November 30 and December 19, 2011, and the typical interview length was between 10-12 minutes.

The ACT project team applied a stratified systematic sample method with the border checkpoint type taken as stratification variable. The final sampling unit was a resident of foreign country aged 15 years and over. The figure below presents the distribution of the interviews according to border checkpoint types:

Type	Border	Sample Size
Airport	Tbilisi Airport	273
Airport	Batumi Airport	32
Port	Port Batumi	42
Port	Port Poti	0
Railway	Railway Gardabani	20
Railway	Railway Sadakhlo	20
Land	Sadakhlo	143
Land	Sarpi	317
Land	Tsodna	50
Land	Red Bridge	140

Based on the methodology created with expert input, the survey data for Wave III was generalized for the period October to December 2011. The overall results of the survey, as well as the results according to purpose of visit and country of residence are provided.

Data according to purpose of visit – the survey results according to purpose of visit are analyzed separately for holiday/leisure/recreation visitors, those visiting friends/relatives and professional/business visits. Analysis for other purposes of visit is not listed separately due to the small sample size.

Data according to country of residence – survey results according to visitor citizenship are 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: Ukraine, Czech Republic, Poland, Belarus, Bulgaria, Latvia, Lithuania, Estonia, Romania, Hungary, Moldova, Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan.

In the category 'Other Europe' are grouped the following countries: France, Austria, Germany, Belgium, Switzerland, Spain, Greece, United Kingdom, Italy, Netherlands, Ireland, and Israel.

Those counties that were not grouped in any of the abovementioned country groups, due to the small sample, were consequently grouped as 'Other Counties'. These countries include: Iran, USA, China, India, South Africa, Japan, Nepal, Bangladesh, Egypt, Malaysia, Nigeria, Syria, Iraq, New Zealand, Sri Lanka, and the Philippines.

## C. FINDINGS

### SOCIO-ECONOMIC PROFILE OF INTERNATIONAL VISITORS TO GEORGIA

**Country of Residence of International Visitors** - Please tell me, in which country do you currently live? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	64%	17%	26%	29%
Azerbaijan	7%	34%	10%	26%
Armenia	8%	24%	17%	24%
Russia	3%	16%	5%	10%
Ukraine	1%	1%	6%	1%
Iran	2%	0%	7%	1%
USA	1%	1%	4%	1%
Israel	2%	1%	3%	1%
Italy	0%	1%	2%	1%
United Kingdom	2%	1%	2%	1%
Austria	1%	0.3%	1%	0.4%
Germany	0.3%	1%	1%	0.4%
France	0.3%	0.3%	1.8%	0.3%
Greece	2%	0.0%	0.4%	0.3%
India	1%	0.4%	0.8%	0.3%
Poland	1%	0.4%	0.8%	0.3%
China	0%	0.0%	2%	0.3%
Moldova	1%	0.4%	0.4%	0.3%
Nepal	2%	0.0%	1.2%	0.3%
Belarus	0.3%	0.6%	0.4%	0.2%
Bulgaria	0.0%	0.0%	0.4%	0.2%
Kazakhstan	0.3%	0.0%	0.4%	0.2%
Spain	0.0%	0.0%	0.9%	0.2%
Czech Republic	0.3%	0.0%	0.9%	0.2%
South Africa	0.0%	0.4%	0.4%	0.2%
Japan	1%	0.0%	0.0%	0.2%
Other	2%	1%	8%	1.4%



**Citizenship of International Visitors** - What is your country of citizenship? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	63%	15%	26%	28%
Azerbaijan	7%	32%	8%	25%
Armenia	8%	24%	17%	24%
Russia	2%	14%	4%	9%
Georgia	2%	9%	2%	4%
Ukraine	1%	1%	5%	1%
Iran	2%	0.2%	7%	1%
USA	0.9%	1%	4%	1%
Israel	2%	1%	2%	1%
Italy	0%	0.3%	2%	0.4%
United Kingdom	2%	0.1%	2%	0.4%
Austria	0.3%	0.3%	1%	0.3%
Belarus	1%	0.2%	0%	0.3%
France	0.3%	0.3%	2%	0.3%
Greece	2%	0.0%	1%	0.3%
India	0.5%	0.4%	1%	0.3%
Poland	1%	0.4%	1%	0.3%
China	0%	0.0%	2%	0.3%
Moldova	1%	0.4%	0%	0.3%
Nepal	2%	0%	1%	0.3%
Other	4%	1%	12%	3%

**International Visitors - Age Groups** - Could you please tell me your age? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
15 - 17	0%	0.3%	0%	0.3%
18 - 24	15%	10%	4%	10%
25 - 34	37%	28%	31%	30%
35 - 44	24%	22%	30%	25%
45 - 54	17%	23%	25%	23%
55 - 64	4%	15%	8%	11%
65 and Above	2%	2%	2%	2%

**International Visitors - Age Groups** - Could you please tell me your age? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
15 - 17	0%	0%	1%	0%	0%	0%	0%
18 - 24	8%	10%	9%	11%	7%	11%	21%
25 - 34	27%	23%	30%	34%	39%	23%	37%
35 - 44	31%	25%	21%	21%	20%	26%	28%
45 - 54	23%	28%	23%	21%	26%	19%	13%
55 - 64	8%	13%	14%	12%	6%	13%	2%
65 and Above	2%	1%	2%	1%	3%	8%	0%

**International Visitors – Gender** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Male	84%	68%	90%	76%
Female	16%	33%	10%	24%

**International Visitors – Gender** - *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Male	90%	64%	64%	81%	59%	55%	71%
Female	10%	36%	36%	19%	41%	45%	29%

**Employment Status of International Visitors** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Hired Employee	19%	34%	49%	31%
Self-employed	60%	28%	29%	37%
Owner of a Business which Employs Others	5%	4%	19%	6%
Unemployed	2%	13%	1%	9%
Housewife/Unpaid Family Workers	3%	9%	0%	6%
Pensioner/Retired	1%	6%	1%	4%
Student	7%	3%	0%	4%
Other	1%	0%	0%	1%
Refused to Answer	2%	3%	1%	2%

**Employment Status of International Visitors** - *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Hired Employee	22%	48%	31%	25%	62%	60%	44%
Self-employed	61%	27%	19%	41%	10%	10%	19%
Owner of a Business which Employs Others	7%	6%	8%	1%	9%	10%	12%
Pensioner/Retired	1%	9%	5%	3%	3%	3%	0%
Unemployed	1%	1%	21%	13%	1%	1%	4%
Housewife/Unpaid Family Workers	2%	6%	11%	8%	10%	0%	5%
Student	4%	1%	2%	6%	1%	11%	17%
Other	1%	1%	1%	0%	0%	0%	0%
Refused to Answer	2%	1%	1%	4%	3%	5%	0%

**Percentage of International Visitors with Georgian Ancestry** - Do you have Georgian ancestry? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	9%	22%	8%	11%
No	91%	78%	92%	89%

**Percentage of International Visitors with Georgian Ancestry** - Do you have Georgian ancestry? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	9%	32%	4%	10%	8%	34%	8%
No	91%	68%	96%	90%	92%	66%	92%

## EXPERIENCE OF VISITING GEORGIA

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	50%	9%	26%	16%
2-3 Times	12%	10%	23%	14%
4-5 Times	4%	9%	9%	10%
6-10 Times	5%	15%	20%	14%
11 Times or More	28%	56%	22%	47%
Average Number of Visits	1 <sup>2</sup>	5	2	3

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	17%	7%	8%	8%	50%	34%	58%
2-3 Times	11%	27%	11%	12%	28%	11%	19%
4-5 Times	3%	12%	11%	10%	7%	14%	8%
6-10 Times	12%	10%	20%	14%	8%	9%	3%
11 Times or More	57%	44%	51%	57%	8%	31%	12%
Average Number of Visits	10	2	3	10	1	1	1

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<sup>2</sup>Median Average

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1st November 2010? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	72%	30%	48%	36%
2-3 Times	12%	25%	29%	25%
4-5 Times	2%	17%	7%	12%
6-10 Times	8%	9%	8%	8%
11 Times or More	6%	19%	8%	19%
Average Number of Visits	1	3	2	2

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1<sup>st</sup> November 2010? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	31%	58%	33%	15%	72%	60%	69%
2-3 Times	19%	30%	26%	26%	24%	24%	24%
4-5 Times	13%	2%	15%	18%	2%	9%	1%
6-10 Times	8%	6%	10%	12%	2%	2%	0%
11 Times or More	30%	4%	17%	29%	0%	5%	7%
Average Number of Visits	3	1	3	4	1	1	1

## DESCRIPTION OF CURRENT VISIT TO GEORGIA

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
1 Day	52%	35%	18%	51%
2-3 Days	19%	20%	45%	21%
4-5 Days	7%	8%	13%	6%
6-7 Days	8%	7%	7%	4%
8-14 Days	7%	13%	8%	7%
15-20 Days	2%	3%	1%	2%
21-30 Days	3%	7%	2%	3%
31 Days or More	3%	7%	6%	5%
Average Duration of Stay (Days)	5	10	7	7

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
1 Day	56%	31%	58%	68%	19%	13%	7%
2-3 Days	25%	8%	23%	23%	22%	17%	16%
4-5 Days	5%	4%	8%	4%	13%	10%	16%
6-7 Days	4%	3%	4%	1%	13%	11%	21%
8-14 Days	3%	23%	3%	1%	18%	21%	22%
15-20 Days	2%	3%	1%	1%	4%	5%	5%
21-30 Days	3%	8%	3%	1%	7%	6%	4%
31 Days or More	3%	21%	1%	1%	3%	19%	9%
Average Duration of Stay (Days)	1	10	1	1	5	8	7

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Alone	64%	69%	60%	64%
With Friends	22%	11%	11%	16%
With Immediate Family Members (spouse, children under 18)	11%	13%	3%	10%
With Extended Family (relatives, parents)	3%	7%	3%	6%
With Colleagues/Co- workers	0.3%	0%	22%	3%
Member of a Tour Group	0%	0%	0.4%	1%
Sports Team Members, Classmates, Peers etc.	0%	0%	2%	0.2%

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Alone	85%	63%	46%	62%	56%	60%	58%
With Friends	10%	9%	23%	18%	8%	15%	23%
With Immediate Family Members (spouse, children under 18)	2%	9%	15%	14%	18%	19%	8%
With Extended Family (relatives, parents)	2%	18%	8%	4%	4%	2%	4%
With Colleagues/Co- workers	1%	1%	4%	1%	13%	5%	6%
Member of a Tour Group	0%	0%	3%	0%	1%	0%	0%
Sports Team Members, Classmates, Peers etc.	0%	0%	1%	0%	0%	0%	0%
Passenger	0%	0%	1%	0%	0%	0%	0%



**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Did not Spend the Night	47%	23%	6%	41%
Private Home of a Friend or Relative (non- paid accommodation)	13%	44%	11%	21%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	30%	10%	70%	20%
Personal Home/Apartment - (non- paid accommodation)	4%	22%	4%	9%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	0%	0%	1%	4%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	5%	1%	4%	3%
Rented House/Apartment - tourist rents the entire property	2%	2%	6%	3%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	0%	0%	0%	1%
Secondary Residence - summer house	0%	4%	0%	1%
Campsite, Caravan site or trailer park (providing some tourist services – shop, information, recreation activities)	0%	0%	0%	0%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	1%	0%	0%	0%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Did not Spend the Night	44%	15%	55%	48%	13%	10%	3%
Private Home of a Friend or Relative (non-paid accommodation)	10%	35%	24%	27%	23%	14%	10%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	26%	7%	11%	17%	38%	40%	47%
Personal Home/Apartment - (non-paid accommodation)	8%	29%	6%	3%	10%	27%	12%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	7%	11%	0%	1%	7%	0%	6%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	3%	3%	2%	1%	11%	7%	8%
Rented House/Apartment - tourist rents the entire property	2%	1%	1%	3%	4%	7%	13%
Secondary Residence - summer house	1%	3%	2%	0%	0%	6%	0%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	0%	0%	0%	2%	1%	2%	0%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	0%	0%	0%	0%	2%	1%	3%

**Means of Transport Used for Arrival** - Please tell me, with which means of transport did you arrive in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Bus/Minibus	43%	44%	21%	42%
Private Vehicle	38%	31%	21%	35%
Rented Vehicle	0%	2%	2%	3%
Trailer	0%	0%	0%	1%
Foreign Airline	13%	12%	44%	11%
Georgian Airways/Airzena	3%	4%	9%	3%
Train	1%	5%	3%	3%
Walking	0%	1%	0%	1%
Public Vessel – Yacht/Ship/Ferry/Boat	0%	1%	0%	1%
No Answer	1%	1%	0%	0%

**Means of Transport Used for Arrival** - Please tell me via, with which means of transport did you arrive in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Bus/Minibus	57%	39%	52%	32%	10%	15%	12%
Private Vehicle	32%	13%	38%	56%	9%	16%	5%
Rented Vehicle	3%	0%	6%	2%	3%	2%	3%
Trailer	2%	0%	0%	0%	0%	0%	0%
Foreign Airline	4%	27%	1%	2%	62%	53%	56%
Georgian Airways/ Airzena	1%	7%	0%	0%	7%	14%	21%
Train	0%	11%	2%	6%	3%	0%	2%
Walking	0%	0%	1%	2%	0%	0%	0%
Public Vessel – Yacht/Ship/Ferry/Boat	0%	2%	0%	0%	1%	0%	1%
No Answer	0%	0%	0%	1%	5%	0%	0%

## MAIN PURPOSE AND MAJOR INTERESTS IN TRAVELING TO GEORGIA

**Main Purpose of Visit** - Please tell me, what was the main purpose of your current visit to Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other	All Visitors
Visiting Relatives	7%	42%	23%	27%	14%	26%	6%	20%
Transit on the Way to Another Country	14%	25%	23%	15%	24%	8%	6%	17%
Leisure/Recreation/Vacation	31%	4%	5%	4%	21%	23%	22%	14%
Shopping, Buying Goods with the Aim of Consumption	5%	4%	14%	22%	0%	2%	3%	11%
Visiting Friends	11%	8%	7%	12%	8%	5%	10%	10%
Business or Professional	9%	5%	7%	4%	32%	28%	41%	9%
Employment	21%	4%	2%	1%	1%	6%	2%	7%
Buying Goods with the Aim of Resale	1%	0%	14%	5%	0%	0%	0%	5%
Education or Training	1%	0%	3%	5%	0%	0%	5%	3%
Health and Medical Care	0%	4%	0%	3%	0%	2%	0%	1%
Personal Reason	0%	5%	1%	2%	0%	0%	0%	1%
Visit to Second Home	0%	1%	1%	0%	0%	0%	0%	1%
Refused to Answer	1%	0%	0%	0%	0%	0%	6%	1%

**Medical Treatment in Georgia** - You have mentioned that the purpose of your visit to Georgia was for medical or health reasons. Could you please tell me what type of treatment or surgery you have received and where? *(Overall picture)*

	N	Location
Surgical Operation/Procedure	1 respondent	Tbilisi - 1 respondent
Consultation with Physician	4 respondents	Tbilisi – 2 respondents Lagodekhi – 1 respondent Refused to answer – 1 respondent
Medical Examination (analysis, x-ray, ultrasound, tomography, etc.)	8 respondents	Tbilisi – 7 respondents Refused to answer - 1 respondent
Childbirth/Hysterectomy /Gynecological	1 respondents	Tbilisi – 1 respondent

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*International visitors with leisure/recreation/vacation purpose N=772*)

Yes	9%
No	91%

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*By country of residence for international visitors with leisure/recreation/vacation purpose N=772*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	2%	10%	25%	29%	5%	25%	21%
No	98%	90%	75%	71%	95%	75%	79%

**Employment in Georgia** - Concerning your employment, are/were you being paid by a resident Georgian company, the Georgian Government or foreign business registered in Georgia? (*International tourists with employment purpose of visit*)

Yes	17%
No	83%

**MICE Tourism** - Was your primary reason for visiting Georgia on this trip any of the following? (*International tourists with business or professional purpose of visit N=52*)

Corporate/Business Meeting, Seminar, Workshop or Presentation	45%
Conference, Congress, Forum	6%
Incentive Tour Organized by a Business	2%
Exhibition/Trade Fair	1%
I have not participated in any type of event	46%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	4%	33%	38%	39%
Tasting Georgian Cuisine	31%	42%	48%	30%
Shopping	22%	19%	12%	24%
Rest and Relaxation	68%	22%	13%	19%
Tasting Georgian Wine	22%	27%	37%	17%
Experiencing Georgia's Nature/Scenery/ Landscape	27%	20%	26%	16%
Experiencing Georgian Hospitality	14%	10%	15%	9%
Visiting Georgia's Historical Sites	17%	8%	18%	8%
Exploring Georgia's Architecture	13%	6%	10%	7%
Experiencing Georgia's Culture and Folklore	9%	4%	7%	4%
Experiencing Georgia's Nightlife and Entertainment	6%	6%	4%	3%
Undertaking Outdoor Adventurous Activities	3%	3%	0%	2%
I Don't Know/Hard to Answer	0%	0%	1%	1%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	45%	23%	41%	43%	27%	22%	19%
Tasting Georgian Cuisine	9%	65%	28%	26%	51%	63%	62%
Shopping	14%	23%	37%	26%	20%	14%	14%
Rest and Relaxation	36%	28%	7%	5%	23%	32%	28%
Tasting Georgian Wine	5%	43%	14%	10%	46%	58%	42%
Experiencing Georgia's Nature/Scenery/ Landscape	9%	35%	8%	12%	41%	39%	43%

Experiencing Georgian Hospitality	4%	24%	9%	5%	29%	22%	14%
Visiting Georgia's Historical Sites	4%	15%	5%	2%	34%	28%	31%
Exploring Georgia's Architecture	3%	17%	8%	1%	27%	15%	16%
Experiencing Georgia's Culture and Folklore	2%	3%	4%	1%	10%	21%	16%
Experiencing Georgia's Nightlife and Entertainment	5%	2%	2%	1%	7%	10%	7%
Undertaking Outdoor Adventurous Activities	2%	2%	1%	1%	3%	6%	3%
I Don't Know/Hard to Answer	0%	0%	1%	2%	0%	0%	0%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	4%	34%	36%	40%
Tasting Georgian Cuisine	32%	33%	53%	26%
Shopping	23%	19%	16%	24%
Rest and Relaxation	22%	27%	40%	17%
Tasting Georgian Wine	66%	19%	9%	16%
Experiencing Georgia's Nature/Scenery/ Landscape	25%	13%	20%	12%
Experiencing Georgian Hospitality	12%	9%	17%	9%
Visiting Georgia's Historical Sites	14%	4%	16%	5%
Exploring Georgia's Architecture	12%	4%	8%	5%
Experiencing Georgia's Culture and Folklore	7%	4%	3%	3%
Experiencing Georgia's Nightlife and Entertainment	8%	2%	6%	3%
Undertaking Outdoor Adventurous Activities	3%	2%	0%	1%
I Don't Know/Hard to Answer	0%	0%	1%	1%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	44%	32%	41%	45%	24%	21%	17%
Tasting Georgian Cuisine	9%	46%	26%	19%	63%	69%	67%
Shopping	17%	21%	33%	27%	23%	15%	17%
Tasting Georgian Wine	5%	42%	12%	10%	49%	58%	40%
Rest and Relaxation	34%	20%	5%	3%	20%	30%	25%
Experiencing Georgia's Nature/Scenery/Landscape	8%	27%	5%	5%	33%	38%	38%
Experiencing Georgian Hospitality	4%	24%	9%	4%	27%	21%	15%
Visiting Georgia's Historical Sites	3%	9%	2%	1%	29%	21%	22%
Exploring Georgia's Architecture	2%	7%	5%	1%	26%	16%	10%
Experiencing Georgia's Culture and Folklore	1%	3%	2%	1%	11%	17%	12%
Experiencing Georgia's Nightlife and Entertainment	5%	2%	1%	1%	6%	9%	7%
Undertaking Outdoor Adventurous Activities	1%	2%	1%		3%	4%	2%
I Don't Know/Hard to Answer	0%	0%	1%	2%	0%	0%	0%

**Popular Locations** - Please tell me which locations, sites and/or attractions you visited in Georgia during this visit? *(Overall picture)*

	%	Average Number of Nights
Tbilisi	44%	1
Batumi (Kvariati, Botanical Garden, Gonio Fortress)	22%	1
Marneuli	10%	1
Rustavi	7%	1
Lagodekhi (National Park)	3%	0
Mtskheta (Svetitskhoveli Cathedral, Jvari Monastery, Armazi Fortress, Samtavro, Pompey's Bridge)	3%	0
Kabali	3%	0
Kutaisi (Gelati Monastery, Bagrat's Cathedral, Tskaltubo Caves)	3%	1
Kobuleti	2%	1



Bolnisi (Bolnisi Sioni Church)	1%	n/a
Gori (Stalin's Museum, Gori Fortress)	1%	n/a
Gardabani	1%	n/a
Sighnaghi (Bodbe Monastery)	1%	n/a
Zugdidi (Dadiani's Palace)	1%	n/a
Tsalka	1%	n/a
Borjomi (Likani, Mineral waters, Green Monastery, Timotesubani, National Park)	1%	n/a
Bakuriani (Kokhtagora, Didveli)	1%	n/a
Kazbegi (Gergeti Trinity Church)	1%	n/a
Telavi (King Erekle's Museum and Palace, Tsinandali Palace)	1%	n/a
Sadakhlo	1%	n/a
Poti	1%	n/a
Dmanisi (Dmanisi Museum - Archeological Monument)	1%	n/a
Tchatura	1%	n/a
Other	3%	n/a
None	14%	n/a

## EXPENDITURE DURING TRAVEL IN GEORGIA

### Expenditure Structure

Number of Total Visitors	754,547
Total Expenditure	GEL 365,955,295
Expenditure per Visitor	GEL 485

### Expenditures by Purpose of Visit

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Leisure/ Recreation/ Vacation	14%	GEL 42,782,985	105,637	GEL 405
Visiting Friends and Relatives	30%	GEL 105,032,896	226,364	GEL 464
Business or Professional	9%	GEL 73,002,175	67,909	GEL 1,075
Other	47%	GEL 145,137,239	354,637	GEL 409

**Expenditure on Services** - Please tell me how much you have spent on the items listed during this visit to Georgia (excluding those services included in the tour package)?

	Total Expenditure	Share of Total Expenditure
Served Food and Drinks	GEL 109,786,589	30%
Accommodation	GEL 36,595,530	10%
Shopping	GEL 65,871,953	18%
Cultural and Entertainment Services	GEL 21,957,318	6%
Domestic Ground Transportation	GEL 65,871,953	18%
Sports and Recreational Services	GEL 3,659,553	1%
Tour Package	GEL 731,911	0.2%
Medical Services	GEL 3,659,553	1%
Domestic Air Transportation	GEL 731,911	0.2%
Other Expenditure	GEL 57,089,024	15.6%

## ORGANIZER OF VISITS TO GEORGIA AND INFORMATION SOURCES ABOUT GEORGIA

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Myself	81%	81%	43%	68%
Family Members/Friends	15%	18%	2%	12%
My Business/Company	4%	1%	53%	12%
Foreign Travel Agency/ Tour Operator	1%	0%	0%	1%
Sports Committee	0%	0%	2%	0.2%
Ministry of Diaspora	0%	0%	1%	0.1%
Georgian Embassy	0%	0%	0%	0.1%
Did not Plan - Transit	0%	0%	0%	8%

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Myself	72%	71%	52%	83%	54%	67%	49%
Family Members/Friends	6%	9%	22%	11%	8%	11%	20%
My Business/Company	16%	7%	11%	3%	28%	19%	23%
Foreign Travel Agency/ Tour Operator	0%	0%	1%	0%	2%	0%	4%
Sports Committee	0%	0%	1%	0%	0%	0%	0%
Ministry of Diaspora	0.2%	0%	0%	0%	0%	0%	0%
Georgian Embassy	0.4%	0%	0%	0%	0%	0%	0%
Did not Plan - Transit	6%	13%	13%	3%	7%	4%	3%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I Don't Remember	7%	12%	8%	11%
Previous Visit	68%	70%	55%	72%
Friends & Relatives	27%	30%	20%	24%
Organization/Business Partner	1%	1%	28%	4%
Television/Radio	3%	4%	9%	6%
Specialized Tourism, Travel or Special Interest Magazine	0%	0%	0%	0%
Newspaper/Other Magazine	1%	0%	2%	1%
Travel Guidebook	1%	0%	1%	0%
Travel Agency/Tour Operator	2%	0%	0%	0%
Georgian Embassy/Consulate	0%	0%	0%	0%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	1%	0%	2%	1%
Internet	8%	1%	11%	3%
Books	1%	2%	0%	3%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I Don't Remember	12%	16%	5%	11%	12%	19%	10%
Previous Visit	75%	73%	83%	79%	30%	34%	21%
Friends & Relatives	12%	16%	50%	10%	30%	31%	46%
Organization/Business Partner	2%	2%	1%	1%	20%	17%	19%
Television/Radio	0%	10%	17%	0%	10%	2%	7%
Specialized Tourism, Travel or Special Interest Magazine	0%	0%	0%	0%	0%	0%	1%
Newspaper/Other Magazine	0%	4%	0%	0%	5%	2%	6%

Travel Guidebook	0%	0%	0%	0%	2%	3%	3%
Travel Agency/Tour Operator	0%	0%	1%	0%	0%	3%	3%
Georgian Embassy/Consulate	0%	0%	0%	0%	0%	0%	1%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0%	0%	0%	0%	0%	2%	8%
Internet	1%	5%	1%	0%	20%	15%	22%
Books	0%	8%	6%	0%	3%	1%	3%

**Websites and Portals Used to Obtain Information on Georgia** - Please tell me from which travel-related websites you obtained information about Georgia? (Overall picture – N= 162)

I cannot recall any specific website	39%	www.caucasus.com	3%
www.lonelyplanet.com	17%	www.worldtravelguide.com	2%
www.wikitravel.com	16%	www.map.ge	2%
www.georgia.travel	15%	www.expedia.com	1%
www.S7.ru	12%	www.couchsurfing.com	1%
www.tripadvisor.com	11%	www.Tbilisiguide.ge	1%
www.info-tbilisi.ge	4%	www.voyages-sncf.com	1%
www.kaukaz.pl	4%	www.virtualtourist.com	1%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (By purpose of visit)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	5%	4%	10%	3%
No	95%	96%	90%	97%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (By country of residence)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	1%	3%	0%	0%	19%	22%	17%
No	99%	97%	100%	100%	81%	78%	83%

**Train Tickets** - Please tell me whether your train tickets were purchased online (*By purpose of visit*)

	Total
No	100%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	1%	0.1%	0.4%	0.3%
No	99%	99.9%	99.6%	99.7%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	0%	5%	1.7%
No	100%	100%	100%	100%	100%	95%	98.3%

**Tour Package** - Please tell me whether your tour package was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0.3%	0%	0%	0%
No	99.7%	100%	100%	100%

**Tour Package** - Please tell me whether your tour package was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	0%	0%	1%
No	100%	100%	100%	100%	100%	100%	99%

## PROBLEMS ENCOUNTERED IN GEORGIA

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I have not Encountered any Problems	87%	88%	71%	81%
Transportation (roads/traffic)	6%	4%	10%	7%
Public Toilets	6%	6%	6%	7%
Foreign Language Capacity	3%	2%	8%	4%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	2%	2%	2%	3%
Navigation/Road Signs/Interpretation	1%	1%	2%	1%
Information on Transport Timetables and Destinations	2%	0%	2%	1%
Poor Service in Restaurants/Food Spots	1%	1%	3%	1%
Poor Service in Hotels/Guesthouses	0%	0%	5%	1%
Untidy/Dirty Streets, Parks, Squares	2%	1%	2%	1%
Attitude of Police	0%	0%	0%	1%
Lack of Tourism Informational Centers/Points	1%	0%	2%	1%
Exchanging Money	1%	1%	0%	1%
Border Crossing	0%	0%	1%	1%
Sanitary Conditions in Hotels and Restaurants	0%	1%	1%	1%
Unfriendly Attitude of People	0%	0%	0%	1%
Lack of Shopping Centers	1%	0%	1%	0%
Lack of Modern Restaurants and Cafes	1%	0%	2%	0%
Poor Service of Georgian Utility Companies	0%	0%	0%	0%

Political Instability	0%	0%	0%	0%
Other	5%	1%	9%	2%

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I have not Encountered any Problems	79%	71%	90%	87%	70%	78%	48%
Transportation (roads/traffic)	10%	6%	2%	6%	20%	11%	8%
Public Toilets	13%	10%	2%	1%	11%	10%	18%
Foreign Language Capacity	4%	1%	1%	2%	5%	12%	30%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	5%	2%	2%	2%	2%	2%	1%
Navigation/Road Signs/Interpretation	1%	1%	0%	2%	1%	3%	6%
Information on Transport Timetables and Destinations	3%	1%	0%	1%	6%	3%	3%
Poor Service in Restaurants/Food Spots	1%	3%	0%	0%	10%	2%	6%
Poor Service in Hotels/Guesthouses	1%	1%	1%	1%	0%	1%	3%
Untidy/Dirty Streets, Parks, Squares	1%	3%	0%	1%	8%	0%	1%
Attitude of Police	3%	0%	1%	0%	0%	0%	0%
Lack of Tourism Informational Centers/Points	0%	1%	1%	0%	0%	4%	3%
Exchanging Money	0%	4%	1%	0%	0%	0%	0%
Border Crossing	0%	4%	0%	0%	0%	0%	1%
Sanitary Conditions in Hotels and Restaurants	0%	2%	0%	1%	1%	2%	2%
Unfriendly Attitude of People	2%	0%	0%	0%	0%	0%	1%
Lack of Shopping Centers	0%	0%	1%	0%	0%	2%	2%
Lack of Modern Restaurants and Cafes	1%	0%	0%	0%	5%	0%	2%
Poor Service of Georgian	0%	4%	0%	0%	0%	0%	0%



Utility Companies							
Political Instability	1%	0%	0%	0%	0%	0%	0%
Other	2%	1%	1%	2%	9%	3%	14%

## SATISFACTION FROM THE TRIP TO GEORGIA AND PLANS FOR A FUTURE VISIT

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Very Satisfied	73%	74%	57%	61%
Satisfied	18%	24%	38%	32%
Dissatisfied	2%	1%	3%	3%
I Don't Know/Hard to Answer	8%	2%	3%	4%
Average Satisfaction	3.8	3.8	3.6	3.6

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Very Satisfied	61%	71%	49%	69%	58%	73%	47%
Satisfied	27%	21%	46%	28%	29%	18%	52%
Dissatisfied	5%	8%	0%	2%	9%	2%	1%
I Don't Know/Hard to Answer	7%	0%	5%	1%	3%	7%	1%
Average Satisfaction	3.6	3.6	3.5	3.7	3.5	3.8	3.5

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Georgian Wine	3.9	3.9	3.8	3.8
Environment/Landscape of Georgia	3.8	3.9	3.8	3.8
Historical and Cultural heritage	3.7	3.9	3.8	3.8
Georgian Cuisine	3.8	3.8	3.7	3.7
Georgian Hospitality	3.8	3.8	3.7	3.6
Guesthouse/B&B Facilities and Services	3.6	3.5	3.8	3.5
Tourism Informational Centre Service	3.6	3.3	3.0	3.5
Restaurant Facilities and Service	3.7	3.5	3.6	3.4
Hotel Facilities and Service	3.5	3.3	3.6	3.3
Transport Services/ Infrastructure	3.3	3.4	3.2	3.2
Travel Agency / Tour Operator Service	3.4	3.2	3.2	3.2
Value for Money	3.2	3.3	3.3	3.2

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Georgian Wine	3.8	4.0	3.8	3.9	3.6	3.8	3.7
Environment/Landscape of Georgia	3.7	3.7	3.9	3.8	3.8	3.8	3.6
Historical and Cultural heritage	3.6	4.0	3.6	3.9	3.8	3.8	3.8
Georgian Cuisine	3.6	3.8	3.6	3.7	3.6	3.9	3.6
Georgian Hospitality	3.5	3.8	3.7	3.7	3.5	3.9	3.6
Guesthouse/B&B Facilities and Services	3.6	3.8	3.3	3.4	3.5	3.8	3.5
Tourism Informational	3.9	3.3	3.7	3.8	3.0	3.5	3.3

Centre Service							
Restaurant Facilities and Service	3.5	3.2	3.4	3.4	3.4	3.6	3.3
Hotel Facilities and Service	3.3	3.2	3.1	3.2	3.5	3.6	3.4
Transport Services/ Infrastructure	2.9	3.2	3.4	3.3	3.0	3.2	3.0
Travel Agency / Tour Operator Service	3.3	3.1	3.0	2.9	3.0	3.5	3.1
Value for Money	3.2	2.9	2.9	3.4	3.3	3.4	3.3

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	96%	90%	90%	88%
Maybe	3%	10%	9%	11%
No	2%	1%	0%	1%
Don't Know	0%	0%	1%	0.2%

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	94%	79%	82%	94%	73%	86%	88%
Maybe	5%	21%	17%	6%	18%	11%	12%
No	0.4%	0%	1%	0%	9%	3%	0%
Don't Know	1%	0.1%	0%	0%	0%	0%	0%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	91%	87%	82%	78%
Maybe	7%	12%	16%	21%
No	2%	1%	0%	1%
Don't Know	0%	0%	2%	0.2%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	82%	71%	66%	85%	76%	90%	85%
Maybe	16%	25%	34%	15%	13%	8%	14%
No	1%	4%	0%	0%	11%	2%	0%
Don't Know	1%	0%	0%	0%	0%	0%	1%

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# INTERNATIONAL VISITOR SURVEY – WAVE IV REPORT

FINAL

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# **INTERNATIONAL VISITOR SURVEY – WAVE IV REPORT**

FINAL

USAID ECONOMIC PROSPERITY INITIATIVE (EPI)

CONTRACT NUMBER: AID-114-C-10-00004

DELOITTE CONSULTING LLP

USAID/CAUCASUS

MONDAY, SEPTEMBER 17, 2012

## **DISCLAIMER:**

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# DATA

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# ABSTRACT

ACT Research prepared this Fourth Wave International Visitor Survey Report for Deloitte Consulting LLP in the framework of USAID-funded Economic Prosperity Initiative (EPI). The report represents the period January to March 2012.

The research was undertaken to create an annual set<sup>1</sup> of visitor surveys based on statistically valid templates and methodologies. The data produced is necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU - Eurostat) and United Nations World Tourism Organization (UNWTO) obligations.

Face to face interviews were conducted at a variety of border-crossing points (road, airport, port and railway) with 1026 international visitors leaving Georgia between February 16 and March 1, 2012.

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<sup>1</sup> Surveys are undertaken quarterly

# ABBREVIATIONS/DEFINITIONS

ACT	ACT Research (Market Research & Consulting Company)
EPI	Economic Prosperity Initiative
EU	European Union
GDP	Gross Domestic Product
GEL	Georgian Currency - the Lari
GNTA	Georgian National Tourism Administration
MICE	Meetings, Incentives, Conferences & Exhibitions
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
Formal information sources	Information acquired from internet, media, tourist agencies etc.
Informal information sources	Information acquired from relatives, friends, and colleagues - word of mouth
Holiday-makers	Leisure, recreation or vacation tourists.
Neighboring countries	Turkey, Russia, Azerbaijan and Armenia
Tourist	A visitor who stays at least one night in a collective or private accommodation in the place/country visited.
Visitor	Any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.
Word of Mouth	Information received from friends, relatives, colleagues or other persons

# CONTENTS

- I. EXECUTIVE SUMMARY ..... 1
- II. APPENDICES..... 3
  - A. BACKGROUND ..... 4
  - B. METHODOLOGY ..... 5
  - C. FINDINGS..... 7

# I. EXECUTIVE SUMMARY

The International Visitor Survey was conducted to examine the behavior, satisfaction, expenditure and profile of international visitors to Georgia. This document reports on the fourth in a series of five quarterly international visitor surveys.

The survey results indicated that the socio-economic profile of the typical international visitor is a 35-44 year old (28%) hired employed (30%) male (80%). Most international visitors are residents of Georgia's neighboring countries; Turkey (37.8%), Azerbaijan (24.6%), Armenia (20.5%) and Russia (7.5%). Only 17% of international visitors surveyed were of Georgian descent, and came predominantly from Russia (57%) and 'Other' Europe (26%).

Between January and March, 2012, only 24% of visitors were visiting Georgia for the first time. Of these tourists, 50% visited Georgia for leisure/recreation/vacation purposes while 37% traveled for business and 11% came to see friends and relatives.

The survey results indicated that the average international visitor traveled to Georgia five times, although this number varied according to the purpose of visit. For example, visitors traveling to see friends and relatives made an average of ten trips, business visitors travelled twice on average, and holiday makers travelled to Georgia only once on average.

Georgia hosted residents of neighboring countries more often than visitors from other countries. For instance, Armenians made 20 and Azeri 15 trips on average, Russians 5 and tourists from Turkey, 'Other' Europe and 'Other' Countries stayed only once on average.

Based upon the survey data, most visitors (66%) organized their own travel; only 1% used a travel agency. In general, the use of a travel agency to organize travel to Georgia was low among all visitors regardless of country of residence.

In order to plan their visits, visitors relied on a variety of information sources such as 'word of mouth'. For example, 27% of international visitors obtained information via 'word of mouth' from their friends and relatives, while 64% relied on data gathered from previous visits.

In addition to information gained via 'word of mouth', visitors from Central and Eastern, and 'Other' Europe also relied on the Internet for information about Georgia. The most popular Internet websites among international visitors were [www.map.ge](http://www.map.ge), [www.lonelyplanet.com](http://www.lonelyplanet.com), [www.wikitavel.org](http://www.wikitavel.org) and [www.info-tbilisi.ge](http://www.info-tbilisi.ge). However, the Internet was not often used to book travel arrangements; only 1% of international visitors booked air tickets online and only 1% booked accommodation online.

The majority of international visitors (61%) travelled alone, 17% were accompanied by family members, and an additional 18% travelled with friends. In general, visitors traveling on business visited Georgia alone (64%), or with colleagues and co-workers (22%).

Most international visitors (84%) used land transportation, such as private vehicles and minibuses, to travel to Georgia. However, 12% of international visitors arrived by plane, 2% arrived by train and 0.4% used a ship or public vessel.

The survey data demonstrated that 31% of international visitors did not pay for accommodation; 20% stayed with relatives and/or friends and 11% stayed in a personal home or second home.

However, 28% of international visitors spent a night in a hotel and this accommodation was most popular among those from 'Other' Countries (49%), Central and Eastern Europe (41%) and Turkey (40%). Also, 68% of visitors who travelled for business and professional reasons stayed at hotels.

The survey data indicated that 27% of international visitors came to Georgia to see family and friends, while 31% travelled for leisure/recreation/vacation purposes. Only 10% of visitors traveled on business; other purposes such as purchasing goods with the intention of resale and shopping totaled 15%. Seven percent of visitors were transiting the country.

International visitors traveling in Georgia were interested in the following experiences: tasting Georgian cuisine (28%), shopping (24%), rest and relaxation (32%), and tasting Georgian wine (14%). Those interested in shopping were predominantly residents of Armenia (41%) and Azerbaijan (37%), while visitors from 'Other' Countries, 'Other Europe' and Russia were eager to taste Georgian cuisine (56%, 54% and 53% respectively) and Georgian wine (37%, 51% and 43% respectively).

The most popular cities were Tbilisi and Batumi, both hosting 39% of international visitors. In addition, 12% of international visitors traveled to Marneuli and 8% to Rustavi.

Between January and March 2012, a total of 711,895 international visitors traveled to Georgia and spent GEL 322,090,111 with an average expenditure per tourist of GEL 452. International visitors traveling for business had the highest average expenditure with an average of GEL 945 spent per visitor. Holiday makers spent an average of GEL 449 per capita, while visitors visiting friends and relatives normally didn't spend more than GEL 355 per person on average.

International visitors generated revenues in the following sectors: a) served food and drinks – GEL 86,964,330; b) accommodation – GEL 74,080,726; c) shopping – GEL 93,406,132; and d) domestic ground transportation - GEL 22,546,308.

The visitors surveyed were asked to rate their experiences on a '4 Point Scale' where '1' indicates extreme dissatisfaction and '4' represents great satisfaction. Visitors rated Georgia well overall (score of 3.7). In general, visitors from 'Other Europe', Russia and Central and Eastern Europe gave the best ratings (3.8), while those from Azerbaijan and 'Other' countries were less satisfied with ratings of 3.5 each. The following attractions received the best ratings: Georgian wine (3.7), environment and landscape (3.7) and historical and cultural heritage (3.7).

While the majority (84%) of visitors reported not encountering any problems during their visit, some faced problems with public toilets (5%) as well as transportation, traffic and roads (5%). In addition, 4% of people complained about high prices, and 4% of tourists experienced issues with the foreign language capacity in Georgia.

The vast majority of visitors (83%) displayed an interest in visiting Georgia again while those from Turkey (72%) were slightly less interested in returning than other groups.

The majority of visitors (72%) would recommend Georgia to friends and relatives although residents of Armenia (64%) and Turkey (68%) were less likely to recommend the country.

## **II. APPENDICES**

- A. BACKGROUND**
- B. METHODOLOGY**
- C. FINDINGS**

## A. BACKGROUND

Tourism is a priority sector for EPI, and wine tourism and MICE tourism are priority value chains. A solid understanding of tourist behavior has been a significant factor in the success of many countries that have built tourism into a strong Gross Domestic Product (GDP) contributor. Such data is fundamental to sound policy formulation. However, simply measuring the contribution of tourism to the national economy is not enough. EPI's value chain assessment process and other research have pinpointed several important issues:

- Until recently, there has been limited availability of useful tourist data;
- The Georgian National Tourism Administration (GNTA) has undertaken tourism surveys in the past that have been neither comprehensive nor consistent in the methodology used.
- Georgia's tourism sector directly comprises suppliers of tourism products and services, tourist attractions, government entities, educational institutions and private sector associations. To build a complete picture of the tourism industry and define specific policy initiatives, it is critical to obtain and analyze data from many of these individuals and organizations. It is equally important for all of these value chain actors to benefit from a transparent tourism information system that can underpin broad input to policy making and enable better planning and implementation in all segments of society that are involved in the success of Georgian tourism.

GNTA and EPI are, in partnership, undertaking an annual visitor survey based on statistically valid methodologies that would produce the data necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU) and United Nations World Tourism Organization (UNWTO) obligations. The survey data collected will also be used for EPI Performance Monitoring purposes.



## B. METHODOLOGY

The main aim of the survey is to investigate the behavior, satisfaction, expenditure and profile of international visitors to Georgia.

The survey's objectives are to identify/gather data on the Socio-economic profile of international visitors; Repeat visitation; Purpose of visit; Locations visited by visitors; Main interests of visitors; Accommodations utilized; Transportation utilized; Visitor expenditure; Information sources utilized; Satisfaction of facilities, attractions and services; Problems encountered; and Intentions to return.

### RESEARCH METHODOLOGY

In order to study the above mentioned goals and objectives quantitative and qualitative research methodologies were used.

As a first stage of the project, the ACT project team familiarized themselves with background reading related to tourism data collection methodologies, classifications and categories. During this stage, the ACT project team also conducted interviews with regional tourist industry experts.

The ACT project team conducted qualitative data collection by interviewing international visitors who were leaving Georgia. Face to face interviews were conducted at each type of border checkpoint (land, airport, railway and port). Overall, 1,026 tourists were interviewed between February 16 and March 1, 2012, and the typical interview length was between 10-12 minutes.

The ACT project team applied a stratified systematic sample method with the border checkpoint type taken as stratification variable. The final sampling unit was a resident of foreign country aged 15 years and over. The figure below presents the distribution of the interviews according to border checkpoint types:

Type	Border	Sample Size
Airport	Tbilisi Airport	260
Airport	Batumi Airport	52
Port	Port Batumi	42
Port	Port Poti	0
Railway	Railway Gardabani	20
Railway	Railway Sadakhlo	20
Land	Sadakhlo	142
Land	Sarpi	300
Land	Tsodna	50
Land	Red Bridge	140

Based on the methodology created with expert input, the survey data for Wave IV was generalized for the period January to March 2012. The overall results of the survey, as well as the results according to purpose of visit and country of residence are provided.

Data according to purpose of visit – the survey results according to purpose of visit are analyzed separately for holiday/leisure/recreation visitors, those visiting friends/relatives and professional/business visits. Analysis for other purposes of visit is not listed separately due to the small sample size.

Data according to country of residence – survey results according to visitor citizenship are analyzed separately for neighboring countries – Turkey, Russia, Azerbaijan and Armenia. Other countries are grouped in two 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, Latvia, Lithuania, Poland, Romania, Ukraine, Tajikistan, and Uzbekistan.

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

Those counties that were not grouped in any of the abovementioned country groups, due to the small sample, were consequently grouped as ‘Other’ Counties. These countries include: Afghanistan, Brazil, Canada, China, Egypt, India, Indonesia, Iran, Japan, Malaysia, Nepal, New Zealand, Pakistan, the Philippines, Qatar, Saudi Arabia, South Africa, Sri Lanka and the USA.

## C. FINDINGS

### SOCIO-ECONOMIC PROFILE OF INTERNATIONAL VISITORS TO GEORGIA

**Country of Residence of International Visitors** - Please tell me, in which country do you currently live? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	80.2%	11.5%	26.4%	37.8%
Azerbaijan	5.3%	38.8%	18.4%	24.6%
Armenia	5.1%	23.0%	13.9%	20.5%
Russia	1.8%	19.1%	7.4%	7.5%
Ukraine	2.7%	1.6%	5.1%	1.9%
Belarus	0.3%	1.2%	0.0%	0.7%
Iran	0.7%	0.1%	4.8%	0.7%
Germany	0.5%	0.1%	2.2%	0.5%
USA	0.4%	0.2%	2.5%	0.5%
Italy	0.1%	1.1%	0.3%	0.4%
Switzerland	0.1%	0.0%	1.3%	0.4%
India	0.0%	0.0%	1.3%	0.3%
United Arab Emirates	0.0%	0.8%	0.3%	0.3%
Austria	0.1%	0.1%	1.3%	0.2%
Bulgaria	0.0%	0.0%	0.0%	0.2%
France	0.0%	0.2%	0.9%	0.2%
Greece	0.2%	0.5%	0.3%	0.2%
Kazakhstan	0.0%	0.8%	0.0%	0.2%
Netherlands	0.0%	0.5%	0.3%	0.2%
Spain	0.1%	0.0%	0.6%	0.2%
United Kingdom	0.0%	0.0%	1.9%	0.2%
Czech Republic	0.4%	0.0%	1.3%	0.2%
Japan	0.1%	0.0%	0.6%	0.2%
Brazil	0.6%	0.0%	0.0%	0.2%
Other	1.1%	0.2%	8.7%	1.1%

**Citizenship of International Visitors** - What is your country of citizenship? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	80.1%	11.5%	26.0%	37.5%
Azerbaijan	5.3%	38.4%	18.4%	24.5%
Armenia	5.1%	21.4%	13.9%	19.4%
Russia	1.8%	16.2%	7.5%	7.2%
Georgia	0.3%	6.9%	1.0%	2.4%
Ukraine	2.5%	1.2%	4.8%	1.6%
Iran	0.7%	0.8%	5.1%	1.0%
Belarus	0.3%	0.8%	0.0%	0.7%
USA	0.6%	0.4%	2.5%	0.6%
Germany	0.4%	0.1%	1.9%	0.4%
Netherlands	0.2%	0.5%	0.3%	0.4%
India	0.0%	0.0%	1.0%	0.3%
Kazakhstan	0.0%	0.8%	0.3%	0.3%
Switzerland	0.0%	0.0%	0.3%	0.3%
Austria	0.1%	0.1%	1.3%	0.2%
Bulgaria	0.0%	0.0%	0.0%	0.2%
France	0.0%	0.2%	0.9%	0.2%
Poland	0.2%	0.0%	1.3%	0.2%
Spain	0.0%	0.0%	0.6%	0.2%
United Kingdom	0.0%	0.0%	1.9%	0.2%
Czech Republic	0.3%	0.0%	1.3%	0.2%
Syria	0.0%	0.0%	0.0%	0.2%
Japan	0.1%	0.0%	0.6%	0.2%
Brazil	0.6%	0.0%	0.0%	0.2%
Other	1.1%	0.4%	8.9%	1.8%

**International Visitors - Age Groups** - Could you please tell me your age? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
15 - 17	1%	2%	0%	1%
18 - 24	26%	11%	6%	16%
25 - 34	32%	17%	27%	24%
35 - 44	24%	23%	31%	28%
45 - 54	11%	25%	28%	20%
55 - 64	6%	15%	8%	9%
65 and Above	1%	7%	0.3%	3%

**International Visitors - Age Groups** - Could you please tell me your age? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
15 - 17	0%	3%	0%	1%	0%	1%	0%
18 - 24	23%	8%	12%	11%	20%	9%	13%
25 - 34	28%	15%	23%	21%	28%	23%	37%
35 - 44	27%	30%	33%	26%	24%	23%	23%
45 - 54	16%	25%	20%	25%	20%	19%	21%
55 - 64	6%	11%	8%	12%	8%	15%	7%
65 and Above	1%	8%	4%	3%	1%	10%	0%

**International Visitors – Gender** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Male	88%	69%	83%	80%
Female	12%	31%	17%	20%

**International Visitors – Gender** - *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Male	93%	67%	72%	77%	70%	56%	76%
Female	7%	33%	28%	23%	30%	44%	24%

**Employment Status of International Visitors** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Hired Employee	15%	31%	51%	30%
Self-employed	41%	17%	24%	29%
Owner of a Business which Employs Others	2%	4%	23%	6%
Unemployed	4%	11%	0%	8%
Housewife/Unpaid Family Workers	2%	15%	1%	6%
Pensioner/Retired	2%	10%	0%	4%

Student	17%	7%	1%	9%
Other	6%	3%	0%	3%
Refused to Answer	12%	3%	0%	5%

**Employment Status of International Visitors** - (By country of residence)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Hired Employee	15%	33%	33%	40%	63%	56%	48%
Self-employed	44%	26%	22%	17%	11%	13%	12%
Owner of a Business which Employs Others	2%	8%	10%	6%	8%	9%	20%
Pensioner/Retired	1%	10%	5%	6%	2%	9%	0%
Unemployed	4%	7%	12%	15%	2%	0%	0%
Housewife/Unpaid Family Workers	1%	7%	10%	11%	0%	0%	5%
Student	15%	8%	5%	4%	14%	8%	15%
Other	8%	0%	1%	0%	0%	1%	1%
Refused to Answer	11%	1%	3%	1%	1%	4%	0%

**Percentage of International Visitors with Georgian Ancestry** - Do you have Georgian ancestry? (By purpose of visit)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	10%	38%	3.5%	17%
No	90%	62%	96.5%	83%

**Percentage of International Visitors with Georgian Ancestry** - Do you have Georgian ancestry? (By country of residence)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	12%	57%	6%	23%	18%	26%	6%
No	88%	43%	94%	77%	82%	74%	94%

## EXPERIENCE OF VISITING GEORGIA

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	50%	11%	37%	24%
2-3 Times	20%	13%	23%	17%
4-5 Times	12%	8%	11%	10%
6-10 Times	5%	17%	7%	10%
11 Times or More	14%	50%	23%	39%
Average Number of Visits	1 <sup>2</sup>	10	2	5

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	49%	17%	7%	6%	46%	51%	51%
2-3 Times	23%	19%	17%	9%	19%	21%	23%
4-5 Times	15%	26%	8%	4%	6%	5%	14%
6-10 Times	3%	16%	6%	22%	3%	4%	4%
11 Times or More	11%	23%	62%	60%	27%	20%	9%
Average Number of Visits	1	5	20	15	1	1	1

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1st November 2010? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	76%	42%	58%	47%
2-3 Times	14%	24%	22%	20%
4-5 Times	6%	13%	6%	10%

<sup>2</sup>Median Average

6-10 Times	2%	11%	5%	9%
11 Times or More	2%	10%	10%	14%
Average Number of Visits	1	2	1	2

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1<sup>st</sup> November 2010? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	75%	80%	27%	20%	62%	71%	64%
2-3 Times	14%	18%	24%	25%	22%	22%	20%
4-5 Times	4%	3%	11%	16%	7%	6%	13%
6-10 Times	3%	0%	13%	17%	0%	0%	2%
11 Times or More	4%	0%	26%	22%	9%	1%	1%
Average Number of Visits	1	1	3	4	1	1	1



## DESCRIPTION OF CURRENT VISIT TO GEORGIA

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
1 Day	48%	32%	16%	44%
2-3 Days	34%	19%	33%	27%
4-5 Days	7%	12%	15%	8%
6-7 Days	4%	7%	11%	5%
8-14 Days	4%	7%	12%	5%
15-20 Days	1%	6%	5%	3%
21-30 Days	2%	6%	2%	2%
31 Days or More	1%	12%	7%	5%
Average Duration of Stay (Days)	2	3	4	2

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
1 Day	55%	5%	43%	53%	19%	13%	0%
2-3 Days	31%	14%	33%	21%	21%	11%	36%
4-5 Days	5%	7%	11%	8%	14%	23%	13%
6-7 Days	2%	11%	4%	5%	17%	9%	11%
8-14 Days	3%	14%	3%	5%	15%	14%	11%
15-20 Days	2%	7%	1%	2%	7%	8%	12%
21-30 Days	2%	9%	1%	3%	2%	8%	3%
31 Days or More	1%	35%	4%	4%	4%	13%	13%
Average Duration of Stay (Days)	1	15	2	1	5	7	7

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Alone	76%	58%	64%	61%

With Friends	18%	11%	10%	18%
With Immediate Family Members (spouse, children under 18)	4%	20%	3%	10%
With Extended Family (relatives, parents)	2%	12%	0.3%	7%
With Colleagues/Co-workers	1%	0%	22%	3%
Member of a Tour Group	0.3%	0%	0%	0.2%
Sports Team Members, Classmates, Peers etc.	0%	0%	2%	0.3%

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Alone	85%	64%	21%	58%	58%	64%	68%
With Friends	13%	5%	35%	17%	18%	10%	13%
With Immediate Family Members (spouse, children under 18)	1%	20%	12%	19%	13%	14%	6%
With Extended Family (relatives, parents)	0.3%	8%	24%	6%	7%	1%	1%
With Colleagues/Co-workers	1%	4%	9%	1%	4%	11%	14%
Member of a Tour Group	0.2%	0%	0%	0%	2%	1%	0%
Sports Team Members, Classmates, Peers etc.	0%	0%	0%	1%	0%	0%	0%
Passenger	0%	0%	1%	0%	0%	0%	0%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Did not Spend the Night	32%	22%	9%	34%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	48%	5%	68%	28%
Private Home of a Friend or Relative (non-paid accommodation)	7%	49%	10%	20%

Personal Home/Apartment - (non-paid accommodation)	8%	23%	8%	11%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	1%	0.1%	0%	3%
Rented House/Apartment - tourist rents the entire property	1%	1%	9%	2%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	3%	0.1%	0.3%	1%
Secondary Residence - summer house	0%	0%	0%	1%
Campsite, Caravan site or trailer park (providing some tourist services – shop, information, recreation activities)	0%	0%	0%	1%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	0%	0%	0.3%	0.2%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	0%	1%	0%	0.2%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Did not Spend the Night	39%	4%	42%	40%	14%	13%	0%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	40%	14%	21%	12%	41%	39%	49%
Private Home of a Friend or Relative (non-paid accommodation)	6%	43%	23%	37%	17%	8%	8%
Personal Home/Apartment - (non-paid accommodation)	11%	33%	6%	8%	6%	23%	7%

Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	2%	3%	6%	1%	5%	0%	0%
Rented House/Apartment - tourist rents the entire property	1%	1%	0%	3%	4%	6%	30%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	0%	1%	1%	0%	11%	7%	10%
Secondary Residence - summer house	0%	3%	2%	0%	0%	0%	0%
Campsite, Caravan site or trailer park (providing some tourist services – shop, information, recreation activities)	2%	0%	0%	0%	5%	0%	0%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	0%	0%	0%	1%	0%	1%	1%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	0%	0%	0%	0%	1%	4%	0%

**Means of Transport Used for Arrival** - Please tell me, with which means of transport did you arrive in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Bus/Minibus	82%	45%	31%	56%
Private Vehicle	9%	24%	9%	21%
Rented Vehicle	1%	6%	8%	5%
Trailer	0%	0%	0%	2%
Foreign Airline	6%	9%	39%	9%
Georgian Airways/Airzena	1%	8%	8%	3%
Train	0.1%	4%	5%	2%
Walking	0%	2%	0%	1%
Public Vessel – Yacht/Ship/Ferry/Boat	0.1%	1%	0%	0.4%
No Answer	0%	1%	0%	1%

**Means of Transport Used for Arrival** - Please tell me via, with which means of transport did you arrive in Georgia? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Bus/Minibus	88%	22%	29%	57%	4%	18%	19%
Private Vehicle	5%	16%	58%	22%	5%	0%	0%
Rented Vehicle	0%	6%	9%	10%	5%	0%	0%
Trailer	4%	0%	0%	0%	5%	0%	0%
Foreign Airline	3%	17%	0%	3%	61%	75%	55%
Georgian Airways/Airzena	0%	25%	0%	0%	11%	7%	26%
Train	0%	3%	5%	4%	3%	0%	0%
Walking	0%	0%	0%	3%	5%	1%	0%
Public Vessel – Yacht/Ship/Ferry/Boat	0%	5%	0%	0%	1%	0%	1%
No Answer	0%	6%	0%	0%	0%	0%	0%

## MAIN PURPOSE AND MAJOR INTERESTS IN TRAVELING TO GEORGIA

**Main Purpose of Visit** - Please tell me, what was the main purpose of your current visit to Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other	All Visitors
Leisure/Recreation/Vacation	65%	7%	8%	7%	32%	13%	25%	31%
Visiting Relatives	1%	59%	24%	35%	18%	16%	12%	20%
Shopping, Buying Goods with the Aim of Consumption	5%	0%	18%	23%	0%	0%	0%	11%
Business or Professional	7%	10%	7%	8%	23%	41%	49%	10%
Visiting Friends	7%	10%	7%	8%	9%	9%	0%	7%
Transit on the Way to Another Country	8%	9%	7%	1%	18%	13%	6%	7%
Buying Goods with the Aim of Resale	0%	0%	17%	3%	0%	0%	0%	4%
Personal Reason	1%	0%	5%	4%	0%	1%	0%	3%
Health and Medical Care	0%	1%	0%	8%	0%	3%	1%	2%
Education or Training	0%	1%	4%	3%	0%	1%	6%	2%
Religion or Pilgrimage	5%	0%	0%	0%	0%	0%	0%	2%
Visit to Second Home	0%	4%	3%	0%	0%	0%	0%	1%
Employment	1%	0%	0%	2%	2%	3%	1%	1%

**Medical Treatment in Georgia** - You have mentioned that the purpose of your visit to Georgia was for medical or health reasons. Could you please tell me what type of treatment or surgery you have received and where? *(Overall picture)*

	N	Location
Surgical Operation/Procedure	5 respondent	Tbilisi - 4 respondent Kutaisi – 1 respondent
Consultation with Physician	6 respondents	Tbilisi – 5 respondents Rustavi – 1 respondent
Medical Examination (analysis, x-ray, ultrasound, tomography, etc.)	4 respondents	Tbilisi – 3 respondents Lagodekhi - 1 respondent
Dental Treatment	2 respondents	Tbilisi – 1 respondents Rustavi – 1 respondent
Recovery/Rehabilitation	1 respondent	Borjomi – 1 respondent

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*International visitors with leisure/recreation/vacation purpose N=308*)

Yes	14%
No	86%

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*By country of residence for international visitors with leisure/recreation/vacation purpose N=308*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	14%	0%	28.5%	2%	26%	17%	5%
No	86%	100%	71.5%	98%	74%	83%	96%

**Winter Tourism** - Did you come to Georgia to undertake winter activities - whether or not you actually participated in such activities? (*international visitors with leisure/recreation/vacation purpose N=308*)

Yes	5%
No	95%

**Winter Tourism** - Did you come to Georgia to undertake winter activities - whether or not you actually participated in such activities? (*By country of residence for international visitors with leisure/recreation/vacation purpose N=308*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0.1%	41%	9.5%	2%	68%	58%	0%
No	99.9%	59%	90.5%	98%	32%	42%	100%

**Employment in Georgia** - Concerning your employment, are/were you being paid by a resident Georgian company, the Georgian Government or foreign business registered in Georgia? (*International tourists with employment purpose of visit N=12*)

Yes	14%
No	86%

**MICE Tourism** - Was your primary reason for visiting Georgia on this trip any of the following? (*International tourists with business or professional purpose of visit N=180*)

Corporate/Business Meeting, Seminar, Workshop or Presentation	40%
Conference, Congress, Forum	7%
Incentive Tour Organized by a Business	1%
Exhibition/Trade Fair	0.4%
Established a company/ opened a shop	2%
I have not participated in any type of event	49%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	1%	34%	39%	24%
Tasting Georgian Cuisine	41%	31%	45%	30%
Shopping	5%	19%	10%	22%
Rest and Relaxation	72%	33%	14%	35%
Tasting Georgian Wine	13%	18%	28%	14%
Experiencing Georgia's Nature/Scenery/ Landscape	27%	15%	17%	17%
Experiencing Georgian Hospitality	8%	8%	12%	8%
Visiting Georgia's Historical Sites	13%	9%	14%	9%
Exploring Georgia's Architecture	25%	10%	10%	13%
Experiencing Georgia's Culture and Folklore	4%	3%	7%	4%
Experiencing Georgia's Nightlife and Entertainment	3%	2%	0%	2%
Undertaking Outdoor Adventurous Activities	3%	2%	0%	2%
I Don't Know/Hard to Answer	0%	0%	1%	1%



**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	13%	29%	30%	36%	29%	14%	26%
Tasting Georgian Cuisine	29%	46%	37%	16%	40%	51%	52%
Shopping	7%	14%	43%	35%	7%	7%	12%
Rest and Relaxation	57%	53%	8%	18%	39%	33%	23%
Tasting Georgian Wine	6%	36%	12%	11%	37%	47%	36%
Experiencing Georgia's Nature/Scenery/Landscape	22%	25%	4%	13%	22%	32%	33%
Experiencing Georgian Hospitality	7%	14%	7%	5%	13%	12%	23%
Visiting Georgia's Historical Sites	12%	13%	3%	7%	13%	14%	29%
Exploring Georgia's Architecture	25%	13%	6%	4%	10%	4%	7%
Experiencing Georgia's Culture and Folklore	3%	7%	4%	3%	3%	6%	14%
Experiencing Georgia's Nightlife and Entertainment	1%	3%	0%	3%	8%	3%	5%
Undertaking Outdoor Adventurous Activities	1%	9%	0%	2%	3%	3%	5%
I Don't Know/Hard to Answer	1%	1%	0%	2%	0%	4%	2%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	1%	33%	34%	24%
Tasting Georgian Cuisine	29%	31%	50%	28%
Shopping	9%	21%	13%	24%
Rest and Relaxation	68%	31%	11%	32%
Tasting Georgian Wine	12%	18%	31%	14%
Experiencing Georgia's Nature/Scenery/Landscape	27%	14%	20%	17%
Experiencing Georgian	9%	10%	13%	9%

Hospitality				
Visiting Georgia's Historical Sites	11%	8%	9%	8%
Exploring Georgia's Architecture	25%	9%	7%	13%
Experiencing Georgia's Culture and Folklore	3%	1%	3%	2%
Experiencing Georgia's Nightlife and Entertainment	2%	1%	1%	1%
Undertaking Outdoor Adventurous Activities	2%	1%	1%	1%
I Don't Know/Hard to Answer	0%	1%	1%	1%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	13%	27%	30%	37%	30%	11%	17%
Tasting Georgian Cuisine	20%	53%	37%	16%	40%	54%	56%
Shopping	11%	17%	41%	37%	15%	4%	20%
Rest and Relaxation	52%	53%	7%	15%	41%	36%	27%
Tasting Georgian Wine	6%	43%	12%	10%	31%	51%	37%
Experiencing Georgia's Nature/Scenery/Landscape	22%	19%	4%	12%	29%	35%	40%
Experiencing Georgian Hospitality	8%	18%	7%	5%	18%	20%	29%
Visiting Georgia's Historical Sites	11%	11%	1%	4%	11%	18%	26%
Exploring Georgia's Architecture	25%	11%	4%	3%	9%	8%	15%
Experiencing Georgia's Culture and Folklore	2%	2%	1%	1%	3%	7%	15%
Experiencing Georgia's Nightlife and Entertainment	1%	1%	0.2%	2%	3%	2%	5%
Undertaking Outdoor Adventurous Activities	1%	2%	0.2%	1%	8%	2%	3%
I Don't Know/Hard to Answer	1%	1%	0%	2%	0%	6%	2%

**Popular Locations** - Please tell me which locations, sites and/or attractions you visited in Georgia during this visit? (*Overall picture*)

	%	Average Number of Nights
Tbilisi	39%	1
Batumi (Kvariati, Botanical Garden, Gonio Fortress)	39%	1
Marneuli	12%	0
Rustavi	8%	0
Lagodekhi (National Park)	2%	0
Kabali	2%	0
Gudauri	2%	5
Kutaisi (Gelati Monastery, Bagrat's Cathedral, Tskaltubo Caves)	2%	6
Dmanisi (Dmanisi Museum - Archeological Monument)	1%	4
Kazbegi (Gergeti Trinity Church)	1%	3
Mtskheta (Svetitskhoveli Cathedral, Jvari Monastery, Armazi Fortress, Samtavro, Pompey's Bridge)	1%	0
Gardabani	1%	2
Zugdidi (Dadiani's Palace)	1%	5
Gori (Stalin's Museum, Gori Fortress)	1%	1
Bakuriani (Kokhtagora, Didveli)	1%	3
Kobuleti	1%	3
Poti	1%	1
Other	5%	n/a
None (Transit)	2%	n/a

## EXPENDITURE DURING TRAVEL IN GEORGIA

### Expenditure Structure

Number of Total Visitors	711,895
Total Expenditure	GEL 322,090,111
Expenditure per Visitor	GEL 452

### Expenditures by Purpose of Visit

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Leisure/ Recreation/ Vacation	30%	GEL 95,892,481	213,569	GEL 449
Visiting Friends and Relatives	27%	GEL 68,235,260	192,212	GEL 355
Business or Professional	10%	GEL 67,274,550	71,190	GEL 945
Other	33%	GEL 90,687,820	234,924	GEL 382

### Expenditures by Country of Residence

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Turkey	37.8%	GEL 106,292,920	269,096	GEL 395
Russia	7.5%	GEL 44,101,792	53,392	GEL 826
Armenia	20.5%	GEL 48,013,602	145,938	GEL 329
Azerbaijan	24.6%	GEL 54,814,438	175,126	GEL 313
Central and Eastern Europe	3.8%	GEL 20,505,416	27,052	GEL 758
Other Europe	2.9%	GEL 21,594,670	20,645	GEL 1046
Other	2.9%	GEL 26,767,273	20,646	GEL 1327

**Expenditure on Services** - Please tell me how much you have spent on the items listed during this visit to Georgia (excluding those services included in the tour package)?

	Total Expenditure	Share of Total Expenditure
Served Food and Drinks	GEL 86,964,330	27%
Accommodation	GEL 74,080,726	23%
Shopping	GEL 93,406,132	29%
Cultural and Entertainment Services	GEL 19,325,407	6%
Domestic Ground Transportation	GEL 22,546,308	7%
Sports and Recreational Services	GEL 3,220,901	1%
Tour Package	GEL 322,090	0.1%
Medical Services	GEL 9,662,703	3%
Domestic Air Transportation	GEL 1,288,360	0.4%
Other Expenditure	GEL 11,273,154	3.5%

## ORGANIZER OF VISITS TO GEORGIA AND INFORMATION SOURCES ABOUT GEORGIA

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Myself	76%	77%	32%	66%
Family Members/Friends	21%	23%	6%	20%
My Business/Company	1%	1%	57%	8%
Foreign Travel Agency/ Tour Operator	0%	0%	0%	0%
Sports Committee	0%	0%	0%	0%
Other	1%	0%	6%	1%
Did not Plan - Transit	0%	0%	0%	5%

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Myself	67%	68%	51%	78%	57%	61%	60%
Family Members/Friends	17%	21%	35%	16%	9%	7%	6%
My Business/Company	9%	5%	4%	5%	15%	33%	29%
Foreign Travel Agency/ Tour Operator	0.2%	0%	0%	0%	0%	0%	0%
Sports Committee	0%	0%	0%	0%	0.8%	0%	0%
Other	0.3%	0%	6%	1%	2%	0%	1%
Did not Plan - Transit	6%	6%	5%	1%	17%	0%	5%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I Don't Remember	33%	4%	5%	15%
Previous Visit	44%	76%	61%	64%
Friends & Relatives	23%	37%	18%	27%
Organization/Business Partner	0.1%	0.1%	29%	4%

Television/Radio	13%	12%	3%	10%
Specialized Tourism, Travel or Special Interest Magazine	1%	0%	1%	0.4%
Newspaper/Other Magazine	4%	2%	1%	2%
Travel Guidebook	1%	0.2%	2%	1%
Travel Agency/Tour Operator	0%	0%	0%	0.2%
Georgian Embassy/Consulate	0%	0%	1%	0.1%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0%	0%	0.3%	0.2%
Internet	2%	0.1%	6%	1%
Books	3%	2%	0.3%	2%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I Don't Remember	34%	4%	6%	0%	3%	7%	1%
Previous Visit	47%	76%	68%	90%	61%	43%	42%
Friends & Relatives	19%	41%	56%	9%	33%	24%	23%
Organization/Business Partner	1%	5%	3%	1%	13%	31%	26%
Television/Radio	12%	15%	20%	0%	12%	1%	1%
Specialized Tourism, Travel or Special Interest Magazine	0.2%	0%	0%	0%	5%	3%	1%
Newspaper/Other Magazine	4%	1%	1%	0%	2%	1%	3%
Travel Guidebook	1%	0%	0%	0%	5%	9%	10%
Travel Agency/Tour Operator	0.2%	0%	0%	0%	0%	1%	1%
Georgian Embassy/Consulate	0.2%	1%	0%	0%	0%	0%	0%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0.2%	0%	0%	0%	0%	1%	1%
Internet	0.1%	1%	0%	0.1%	7%	15%	22%
Books	2%	0%	6%	0%	5%	1%	0%

**Websites and Portals Used to Obtain Information on Georgia** - Please tell me from which travel-related websites you obtained information about Georgia? (Overall picture – N= 42)

I cannot recall any specific website	16%	<a href="http://www.couchsurfing.com">www.couchsurfing.com</a>	5%
<a href="http://www.map.ge">www.map.ge</a>	29%	<a href="http://www.expedia.com">www.expedia.com</a>	4%
<a href="http://www.lonelyplanet.com">www.lonelyplanet.com</a>	24%	<a href="http://www.worldtravelguide.com">www.worldtravelguide.com</a>	2%
<a href="http://www.info-tbilisi.ge">www.info-tbilisi.ge</a>	24%	<a href="http://www.E-info.ge">www.E-info.ge</a>	2%
<a href="http://www.wikitravel.org">www.wikitravel.org</a>	20%	<a href="http://www.kaukaz.com">www.kaukaz.com</a>	2%
<a href="http://www.georgia.travel">www.georgia.travel</a>	13%	<a href="http://www.Wakiya-tours.de">www.Wakiya-tours.de</a>	2%
<a href="http://www.kaukaz.pl">www.kaukaz.pl</a>	11%	<a href="http://www.Bakuriani.com">www.Bakuriani.com</a>	2%
<a href="http://www.Gudauri.com">www.Gudauri.com</a>	11%	<a href="http://www.Promethea-voyages.com">www.Promethea-voyages.com</a>	2%
<a href="http://www.tripadvisor.com">www.tripadvisor.com</a>	7%	Other	7%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (By purpose of visit)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	1%	1%	5%	1%
No	99%	99%	95%	99%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (By country of residence)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0.5%	4%	0%	0.2%	3%	9%	10%
No	99.5%	96%	100%	99.8%	97%	91%	90%

**Train Tickets** - Please tell me whether your train tickets were purchased online (By purpose of visit)

	Total
No	100%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	1%	0%	3%	1%
No	99%	100%	97%	99%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0.1%	0%	1%	0.2%	5%	2%	7%
No	99.9%	100%	99%	99.8%	95%	98%	93%

**Tour Package** - Please tell me whether your tour package was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0%	0%	0.3%	0%
No	100%	100%	99.7%	100%

**Tour Package** - Please tell me whether your tour package was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	0%	1.1%	0%
No	100%	100%	100%	100%	100%	98.9%	100%



## PROBLEMS ENCOUNTERED IN GEORGIA

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I have not Encountered any Problems	84%	90%	76%	84%
Public Toilets	5%	6%	3%	5%
Transportation (roads/traffic)	3%	3%	12%	5%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	6%	1%	9%	4%
Foreign Language Capacity	4%	1%	10%	4%
Untidy/Dirty Streets, Parks, Squares	2%	2%	1%	2%
Poor Service in Restaurants/Food Spots	2%	1%	2%	1%
Information on Transport Timetables and Destinations	1%	1%	1%	1%
Navigation/Road Signs/Interpretation	1%	0%	3%	1%
Sanitary Conditions in Hotels and Restaurants	0%	0%	1%	1%
Lack of Foreign Language Menus	1%	0%	3%	1%
Problems at the car market	0%	0%	0%	1%
Attitude of Police	1%	0%	0%	0.4%
Lack of tourist maps	1%	0%	1%	0.3%
Other	2%	1%	4%	2%

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I have not Encountered any Problems	81%	91%	89%	87%	87%	69%	50%
Public Toilets	7%	1%	2%	4%	7%	9%	12%
Transportation (roads/traffic)	7%	6%	3%	1%	7%	6%	9%
Expensive Hotels/Expensive	7%	0%	1%	4%	1%	2%	5%

Restaurants/Expensive Food Products/High Tariffs in General							
Foreign Language Capacity	4%	1%	0%	1%	5%	21%	33%
Untidy/Dirty Streets, Parks, Squares	2%	0%	1%	1%	3%	9%	9%
Poor Service in Restaurants/Food Spots	2%	3%	1%	0%	0%	1%	3%
Information on Transport Timetables and Destinations	0%	0%	0%	1%	1%	2%	10%
Navigation/Road Signs/Interpretation	0%	1%	0%	0%	3%	3%	12%
Sanitary Conditions in Hotels and Restaurants	0%	1%	0%	1%	1%	0%	2%
Lack of Foreign Language Menus	0%	0%	0%	0%	0%	0%	13%
Problems at the car market	0%	0%	1%	1%	0%	0%	0%
Attitude of Police	0%	0%	1%	0%	0%	0%	0%
Lack of tourist maps	0%	1%	0%	0%	1%	0%	9%
Other	1%	1%	1%	1%	4%	4%	19%

## SATISFACTION FROM THE TRIP TO GEORGIA AND PLANS FOR A FUTURE VISIT

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Very Satisfied	71%	75%	70%	68%
Satisfied	29%	25%	30%	32%
Dissatisfied	1%	0%	1%	1%
Average Satisfaction	3.7	3.8	3.7	3.7

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Very Satisfied	71%	84%	70%	56%	77%	77%	55%
Satisfied	29%	16%	29%	44%	23%	23%	41%
Dissatisfied	0%	1%	1%	0%	0%	0%	2%
Very Dissatisfied	0%	0%	0%	0%	0%	0%	1%
Average Satisfaction	3.7	3.8	3.7	3.6	3.8	3.8	3.5

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Georgian Wine	3.6	3.8	3.8	3.7
Environment/Landscape of Georgia	3.5	3.8	3.6	3.7
Historical and Cultural heritage	3.6	3.8	3.7	3.7
Georgian Cuisine	3.6	3.7	3.7	3.6
Georgian Hospitality	3.5	3.7	3.8	3.6

Guesthouse/B&B Facilities and Services	3.1	3.3	3.6	3.2
Tourism Informational Centre Service	3.3	3.5	3.6	3.3
Restaurant Facilities and Service	3.5	3.6	3.6	3.6
Hotel Facilities and Service	3.5	3.4	3.4	3.4
Transport Services/ Infrastructure	3.4	3.4	3.3	3.4
Travel Agency / Tour Operator Service	3.2	3.4	3.4	3.2
Value for Money	3.3	3.4	3.2	3.3

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? **USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Georgian Wine	3.6	3.9	3.8	3.8	3.8	3.9	3.9
Environment/Landscape of Georgia	3.5	3.9	3.6	3.8	3.8	3.8	3.7
Historical and Cultural heritage	3.5	3.9	3.8	3.6	3.9	3.9	3.7
Georgian Cuisine	3.6	3.9	3.6	3.6	3.8	3.8	3.6
Georgian Hospitality	3.6	3.9	3.6	3.6	3.9	3.9	3.7
Guesthouse/B&B Facilities and Services	3.1	3.9	-	4.0	3.2	3.7	3.4
Tourism Informational Centre Service	3.3	3.1	4.0	4.0	3.5	3.5	3.8
Restaurant Facilities and Service	3.5	3.7	3.6	3.5	3.6	3.6	3.4
Hotel Facilities and Service	3.5	3.6	3.1	3.3	3.6	3.7	3.5
Transport Services/ Infrastructure	3.3	3.3	3.7	3.4	3.3	3.4	3.2
Travel Agency / Tour Operator Service	3.3	3.0	-	4.0	3.0	3.5	2.4
Value for Money	3.3	3.4	3.1	3.4	3.5	3.6	3.2

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	72%	90%	92%	83%
Maybe	27%	10%	8%	16%
No	1%	0%	0%	0.4%

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	72%	90%	94%	92%	86%	79%	77%
Maybe	28%	10%	6%	8%	14%	21%	22%
No	1%	0%	1%	0%	0%	0%	1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	69%	76%	79%	72%
Maybe	30%	24%	20%	27%
No	1%	0%	1%	1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	68%	80%	64%	82%	85%	74%	76%
Maybe	32%	20%	35%	18%	15%	22%	20%
No	1%	0%	1%	0%	0%	4%	5%

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# INTERNATIONAL VISITOR SURVEY – WAVE V REPORT

FINAL

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# **INTERNATIONAL VISITOR SURVEY – WAVE V REPORT**

FINAL

USAID ECONOMIC PROSPERITY INITIATIVE (EPI)

CONTRACT NUMBER: AID-114-C-10-00004

DELOITTE CONSULTING LLP

USAID/CAUCASUS

MONDAY, SEPTEMBER 17, 2012

## **DISCLAIMER:**

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# DATA

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# ABSTRACT

ACT Research prepared this Fifth Wave International Visitor Survey Report for Deloitte Consulting LLP in the framework of USAID-funded Economic Prosperity Initiative (EPI). The report represents the period April to June 2012.

The research was undertaken to create an annual set<sup>1</sup> of visitor surveys based on statistically valid templates and methodologies. The data produced is necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU - Eurostat) and United Nations World Tourism Organization (UNWTO) obligations.

Face to face interviews were conducted at a variety of border-crossing points (road, airport, port and railway) with 1037 international visitors leaving Georgia between May 18 and 30, 2012.

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<sup>1</sup> Surveys are undertaken quarterly

# ABBREVIATIONS/DEFINITIONS

ACT	ACT Research (Market Research & Consulting Company)
EPI	Economic Prosperity Initiative
EU	European Union
GDP	Gross Domestic Product
GEL	Georgian Currency - the Lari
GNTA	Georgian National Tourism Administration
MICE	Meetings, Incentives, Conferences & Exhibitions
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
Formal information sources	Information acquired from internet, media, tourist agencies etc.
Informal information sources	Information acquired from relatives, friends, and colleagues - word of mouth
Holiday-makers	Leisure, recreation or vacation tourists.
Neighboring countries	Turkey, Russia, Azerbaijan and Armenia
Tourist	A visitor who stays at least one night in a collective or private accommodation in the place/country visited.
Visitor	Any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.
Word of Mouth	Information received from friends, relatives, colleagues or other persons

# CONTENTS

- I. EXECUTIVE SUMMARY ..... 1
- II. APPENDICES ..... 4
  - A. BACKGROUND ..... 5
  - B. METHODOLOGY ..... 6
  - C. FINDINGS..... 8

# I. EXECUTIVE SUMMARY

The International Visitor Survey was conducted to examine the behavior, satisfaction, expenditure and profile of international visitors to Georgia. This document reports on the fifth in a series of five quarterly international visitor surveys.

The survey results indicated that the socio-economic profile of the typical international visitor is a 25-34 year old (28%) employed (35%) man (74%). Most international visitors are residents of Georgia's neighboring countries; Turkey (39%), Azerbaijan (24%), Armenia (17%) and Russia (9%). Only 9% of international visitors surveyed were of Georgian descent, and came predominantly from Russia (26% of Russian visitors were from the Georgian Diaspora).

Forty-eight percent of visitors visited Georgia for the first time. 71% of leisure/recreation/vacation visitors visited for the first time compared to 46% of business travelers and 17% of those visiting friends and relatives.

The survey results indicated that the average international visitor had traveled to Georgia twice, although this number varied according to the purpose of visit. For example, visitors traveling to see friends and relatives made an average of seven trips, business visitors travelled twice on average, and holiday makers travelled to Georgia only once on average.

Georgia hosted residents of neighboring countries more often than visitors from other countries. For instance, Azeris made ten and Armenians four trips on average, Russians two and tourists from Turkey, 'Other Europe' and 'Other' Countries just one trip on average.

Based upon the survey data, most visitors (64%) organized their own travel; only 1% used a travel agency. In general, the use of a travel agency to organize travel was low among all visitors regardless of country of residence, except those from 'Other Europe' (13%).

In order to plan their visits, visitors relied on a variety of information sources such as 'word of mouth'. For example, 38% of international visitors obtained information via 'word of mouth' from their friends and relatives, while 45% relied on data gathered from previous visits.

In addition to information gained via 'word of mouth', visitors from Central and Eastern Europe, 'Other Europe' and 'Other' countries also relied on the Internet for information about Georgia. The most popular Internet websites among international visitors were [www.lonelyplanet.com](http://www.lonelyplanet.com), [www.kaukaz.pl](http://www.kaukaz.pl), [www.wikitavel.org](http://www.wikitavel.org) and [www.info-tbilisi.ge](http://www.info-tbilisi.ge). However, the Internet was not often used to book travel arrangements; only 3% of international visitors booked air tickets online and only 1% booked accommodation online.

The majority of international visitors (54%) travelled alone, 18% were accompanied by family members, and 21% travelled with friends. In general, visitors traveling on business visited Georgia alone (46%), or with colleagues and co-workers (29%).

Most international visitors (83%) used land transportation, such as private vehicles and minibuses, to travel to Georgia. However, 14% of international visitors arrived by plane, 2% arrived by train and 0.4% used a ship or public vessel.

The survey data demonstrated that 25% of international visitors did not pay for accommodation; 18% stayed with relatives and/or friends and 6% stayed in a personal home or second home (1%).

However, 27% of international visitors spent a night in a hotel and this accommodation was most popular among those from 'Other Europe' (70%), 'Other' countries (53%) and Central and Eastern Europe (45%). Also, 76% of visitors who travelled for business and professional reasons stayed in hotels.

The survey data indicated that 40% of international visitors came to Georgia for leisure/recreation/vacation purposes, while 18% travelled to visit friends and relatives. 9% of visitors traveled for shopping and 8% traveled on business; 9% of visitors were transiting the country.

International visitors traveling in Georgia were interested in the following experiences: experiencing Georgia's nature/scenery/landscape (39%), tasting Georgian cuisine (30%), rest and relaxation (26%), and shopping (21%). Those interested in shopping were predominantly residents of Azerbaijan (32%) and 'Other Europe' (24%), while visitors from 'Other' countries, 'Other Europe' and Central and Eastern Europe were eager to taste Georgian cuisine (69%, 88% and 68% respectively) and Georgian wine (53%, 76% and 59% respectively).

The most popular cities were Tbilisi and Batumi, both hosting two out of five international visitors (Tbilisi 41%, Batumi 40%). In addition, 8% of international visitors traveled to Rustavi and 7% to Marneuli.

Between April and June, a total of 1,013,216 international visitors traveled to Georgia and spent GEL 398,193,888 with an average expenditure per tourist of GEL 393. International visitors traveling for business had the highest average expenditure with an average of GEL 924 spent per visitor. Holiday makers spent an average of GEL 456 per capita, while visitors visiting friends and relatives normally didn't spend more than GEL 267 per person on average.

International visitors generated revenues in the following sectors: a) served food and drinks – GEL 99,548,472; b) accommodation – GEL 99,548,472; c) shopping – GEL 87,602,655; and d) domestic ground transportation - GEL 39,819,389.

The visitors surveyed were asked to rate their experiences on a '4 Point Scale' where '1' indicated extreme dissatisfaction and '4' represented great satisfaction. Visitors rated Georgia well overall (score of 3.6). In general, visitors from Armenia, Central and Eastern Europe and 'Other Europe' gave the best ratings (3.8), while those from Turkey and 'Other' countries were less satisfied with ratings of 3.5 and 3.6 (accordingly). The following attractions received the best ratings: Georgian wine (3.7), environment and landscape (3.7) and Georgian cuisine (3.7).

While the majority (91%) of visitors reported no problems during their visit, some faced problems with transportation (roads/traffic) (2%) as well as foreign language capacity (2%). In addition, 1% of people complained about public toilets, and 1% of tourists experienced issues with untidy/dirty streets, parks, squares. International visitors also complained about navigation/road signs/interpretation (1%), border crossing (1%), lack of tourism informational centers/points (1%) and lack of tourist maps (1%).

The vast majority of visitors (82%) displayed an interest in visiting Georgia again while those from 'Other Europe' (67%) were slightly less interested in returning than other groups.

The majority of visitors (75%) would recommend Georgia to friends and relatives although residents of Armenia (67%) and Turkey (65%) were less likely to recommend the country.

## **II. APPENDICES**

- A. BACKGROUND**
- B. METHODOLOGY**
- C. FINDINGS**



## A. BACKGROUND

Tourism is a priority sector for EPI, and wine tourism and MICE tourism are priority value chains. A solid understanding of tourist behavior has been a significant factor in the success of many countries that have built tourism into a strong Gross Domestic Product (GDP) contributor. Such data is fundamental to sound policy formulation. However, simply measuring the contribution of tourism to the national economy is not enough. EPI's value chain assessment process and other research have pinpointed several important issues:

- Until recently, there has been limited availability of useful tourist data;
- The Georgian National Tourism Administration (GNTA) has undertaken tourism surveys in the past that have been neither comprehensive nor consistent in the methodology used.
- Georgia's tourism sector directly comprises suppliers of tourism products and services, tourist attractions, government entities, educational institutions and private sector associations. To build a complete picture of the tourism industry and define specific policy initiatives, it is critical to obtain and analyze data from many of these individuals and organizations. It is equally important for all of these value chain actors to benefit from a transparent tourism information system that can underpin broad input to policy making and enable better planning and implementation in all segments of society that are involved in the success of Georgian tourism.

GNTA and EPI are, in partnership, undertaking an annual visitor survey based on statistically valid methodologies that would produce the data necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU) and United Nations World Tourism Organization (UNWTO) obligations. The survey data collected will also be used for EPI Performance Monitoring purposes.

## B. METHODOLOGY

The main aim of the survey is to investigate the behavior, satisfaction, expenditure and profile of international visitors to Georgia.

The survey's objectives are to identify/gather data on the Socio-economic profile of international visitors; Repeat visitation; Purpose of visit; Locations visited by visitors; Main interests of visitors; Accommodations utilized; Transportation utilized; Visitor expenditure; Information sources utilized; Satisfaction of facilities, attractions and services; Problems encountered; and Intentions to return.

### RESEARCH METHODOLOGY

In order to study the above mentioned goals and objectives quantitative and qualitative research methodologies were used.

As a first stage of the project, the ACT project team familiarized themselves with background reading related to tourism data collection methodologies, classifications and categories. During this stage, the ACT project team also conducted interviews with regional tourist industry experts.

The ACT project team conducted qualitative data collection by interviewing international visitors who were leaving Georgia. Face to face interviews were conducted at each type of border checkpoint (land, airport, railway and port). Overall, 1,037 visitors were interviewed between May 18 and 30, 2012, and the typical interview length was between 10-12 minutes.

The ACT project team applied a stratified systematic sample method with the border checkpoint type taken as stratification variable. The final sampling unit was a resident of foreign country aged 15 years and over. The figure below presents the distribution of the interviews according to border checkpoint types:

Type	Border	Sample Size
Airport	Tbilisi Airport	258
Airport	Batumi Airport	54
Port	Port Batumi	52
Railway	Railway Gardabani	20
Railway	Railway Sadakhlo	21
Land	Sadakhlo	141
Land	Sarpi	301
Land	Tsodna	50
Land	Red Bridge	140

Based on the methodology created with expert input, the survey data for Wave V was generalized for the period April to June 2012. The overall results of the survey, as well as the results according to purpose of visit and country of residence are provided.

Data according to purpose of visit – the survey results according to purpose of visit are analyzed separately for holiday/leisure/recreation visitors, those visiting friends/relatives and professional/business visits. Analysis for other purposes of visit is not listed separately due to the small sample size.

Data according to country of residence – survey results according to visitor citizenship are 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: Bulgaria, Czech Republic, Kazakhstan, Poland, and Ukraine.

In the category “Other Europe” are grouped the following countries: Austria, France, Germany, Greece, Italy, Netherlands, Spain, and United Kingdom.

Those counties that were not grouped in any of the abovementioned country groups, due to the small sample, were consequently grouped as ‘Other’ Counties. These countries include: Brazil, Iran, India, Japan, United Arab Emirates and USA.

## C. FINDINGS

### SOCIO-ECONOMIC PROFILE OF INTERNATIONAL VISITORS TO GEORGIA

**Country of Residence of International Visitors** - Please tell me, in which country do you currently live? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	71%	15%	9%	39%
Azerbaijan	10%	46%	7%	24%
Armenia	3%	21%	31%	17%
Russia	3%	16%	10%	9%
Iran	2%	1%	10%	2%
Poland	3%	0%	4%	2%
Ukraine	1%	1%	4%	1%
Germany	1%	0.1%	4%	1%
United States	1%	0.2%	3%	1%
United Arab Emirates	0.3%	0%	1%	0.2%
Bulgaria	0.1%	0%	0%	0.2%
Kazakhstan	0.4%	0%	0%	0.2%
Netherlands	1%	0%	0%	0.2%
Brazil	0.1%	0%	0%	0.2%
United Kingdom	0.2%	0%	2%	0.2%
Italy	0.1%	0.1%	1%	0.1%
India	0%	0%	1%	0.1%
Austria	0.1%	0%	1%	0.1%
France	0.1%	0%	1%	0.1%
Greece	0.3%	0%	0.4%	0.1%
Spain	0.1%	0.1%	1%	0.1%
Czech Republic	0.1%	0%	1%	0.1%
Japan	0%	0.1%	0%	0%
Other	4%	1%	12%	3%

**Citizenship of International Visitors** - What is your country of citizenship? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	71%	13%	7%	38%
Azerbaijan	9%	46%	7%	24%
Armenia	3%	21%	31%	18%
Russia	3%	14%	9%	8%
Iran	2%	1%	11%	2%
Poland	3%	0%	4%	2%
Georgia	0.2%	2%	0%	1%
Ukraine	1%	1%	4%	1%
United States	1%	0.2%	3%	1%
Germany	1%	0.1%	3%	1%
Bulgaria	0.4%	0%	0%	0.3%
Netherlands	1%	0%	0%	0.2%
Belarus	0.3%	0%	1%	0.2%
Kazakhstan	0.4%	0%	0%	0.2%
United Kingdom	0.1%	0.2%	1%	0.2%
Austria	0.1%	0%	1%	0.1%
France	0.1%	0%	1%	0.1%
Spain	0.1%	0.1%	1%	0.1%
Czech Republic	0.1%	0%	1%	0.1%
India	0 %	0%	1%	0.1%
Japan	0.1%	0.1%	0%	0.1%
Switzerland	0%	0%	0%	0%
Brazil	0.1%	0%	0%	0%
Other	4%	1%	15%	3%

**International Visitors - Age Groups** - Could you please tell me your age? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
15 - 17	0.3%	1%	0%	0.4%
18 - 24	15%	12%	5%	12%
25 - 34	30%	26%	39%	28%
35 - 44	25%	25%	24%	26%
45 - 54	20%	20%	22%	21%
55 - 64	7%	12%	10%	9%
65 and Above	3%	4%	1%	4%

**International Visitors - Age Groups** - Could you please tell me your age? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
15 - 17	0%	0.4%	2%	0.1%	1%	0%	0%
18 - 24	12%	8%	8%	17%	19%	5%	8%
25 - 34	31%	24%	25%	27%	37%	22%	34%
35 - 44	27%	27%	24%	26%	18%	23%	30%
45 - 54	21%	20%	25%	19%	20%	21%	19%
55 - 64	8%	15%	10%	9%	2%	19%	6%
65 and Above	2%	7%	6%	3%	2%	11%	4%

**International Visitors – Gender** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Male	75%	66%	74%	74%
Female	25%	35%	26%	26%

**International Visitors – Gender** - *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Male	79%	66%	69%	74%	61%	69%	86%
Female	21%	34%	31%	26%	40%	31%	14%

**Employment Status of International Visitors** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Hired Employee	32%	32%	65%	35%
Self-employed	20%	16%	11%	19%
Unemployed	5%	13%	3%	9%
Owner of a Business which Employs Others	3%	10%	20%	8%
Student	9%	4%	0%	7%
Pensioner/Retired	6%	8%	1%	6%
Housewife/Unpaid Family Workers	6%	12%	0%	6%
Other	3%	2%	0.4%	2%
Refused to Answer	17%	3%	1%	8%

**Employment Status of International Visitors - (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Hired Employee	29%	36%	42%	29%	57%	58%	55%
Self-employed	26%	8%	16%	19%	7%	17%	15%
Unemployed	4%	13%	16%	14%	6%	1%	0%
Owner of a Business which Employs Others	0%	19%	12%	11%	5%	5%	18%
Student	8%	3%	2%	7%	17%	7%	4%
Pensioner/Retired	7%	9%	5%	5%	3%	12%	4%
Housewife/Unpaid Family Workers	5%	7%	6%	11%	0%	1%	1%
Other	3%	3%	2%	1%	1%	0%	1%
Refused to Answer	18%	3%	0%	2%	4%	0%	3%

**Percentage of International Visitors with Georgian Ancestry - Do you have Georgian ancestry? (By purpose of visit)**

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	5%	20%	0.4%	9%
No	95%	80%	99.6%	91%

**Percentage of International Visitors with Georgian Ancestry - Do you have Georgian ancestry? (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	7%	26%	8%	9%	10%	3%	2%
No	93%	74%	92%	91%	90%	97%	98%

## EXPERIENCE OF VISITING GEORGIA

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	71%	17%	46%	48%
2-3 Times	16%	22%	27%	20%
4-5 Times	4%	9%	15%	7%
6-10 Times	5%	14%	2%	7%
11 Times or More	4%	38%	9%	18%
Average Number of Visits	1	7	2	2

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	65%	33%	23%	15%	61%	71%	74%
2-3 Times	18%	42%	24%	10%	28%	16%	24%
4-5 Times	5%	10%	12%	10%	6%	9%	2%
6-10 Times	7%	6%	1%	16%	4%	4%	0%
11 Times or More	5%	10%	40%	49%	3%	1%	0%
Average Number of Visits	1	2	4	10	1	1	1

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1st February 2011? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	81%	37%	63%	55%
2-3 Times	12%	26%	20%	19%
4-5 Times	4%	14%	12%	10%
6-10 Times	2%	14%	0.4%	8%
11 Times or More	1%	9%	4%	7%
Average Number of Visits	1	2	1	1



**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1<sup>st</sup> February 2011? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	75%	76%	31%	23%	90%	83%	87%
2-3 Times	16%	17%	30%	20%	7%	14%	12%
4-5 Times	5%	3%	22%	16%	2%	2%	1%
6-10 Times	3%	4%	7%	21%	0%	1%	0%
11 Times or More	1%	0%	10%	21%	1%	0%	0%
Average Number of Visits	1	1	2	5	1	1	1

## DESCRIPTION OF CURRENT VISIT TO GEORGIA

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
1 Day	48%	27%	7%	46%
2-3 Days	27%	29%	18%	24%
4-5 Days	9%	10%	40%	10%
6-7 Days	5%	10%	18%	6%
8-14 Days	8%	12%	8%	7%
15-20 Days	0.3%	4%	2%	2%
21-30 Days	1%	1%	2%	1%
31 Days or More	1%	7%	5%	3%
Average Duration of Stay (Days)	2	3	4	2

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
1 Day	57%	33%	50%	50%	11%	3%	5%
2-3 Days	33%	7%	18%	24%	17%	8%	21%
4-5 Days	6%	12%	15%	7%	29%	20%	19%
6-7 Days	2%	5%	9%	6%	16%	19%	27%
8-14 Days	2%	17%	6%	6%	17%	41%	9%
15-20 Days	0%	7%	0%	3%	2%	3%	3%
21-30 Days	0%	4%	0%	2%	2%	2%	4%
31 Days or More	0%	15%	2%	2%	6%	5%	13%
Average Duration of Stay (Days)	1	5	1	1	5	8	6

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Alone	53%	55%	46%	54%
With Friends	28%	18%	12%	21%
With Immediate Family Members (spouse,	7%	12%	7%	10%

children under 18)				
With Extended Family (relatives, parents)	4%	16%	0%	8%
With Colleagues/Co-workers	2%	0%	29%	4%
Member of a Tour Group	6%	0%	4%	3%
Sports Team Members, Classmates, Peers etc.	0.4%	0%	3%	0.4%
Passenger	0%	0%	0%	0.4%

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (By country of residence)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Alone	68%	58%	30%	51%	37%	35%	44%
With Friends	20%	8%	24%	24%	26%	25%	24%
With Immediate Family Members (spouse, children under 18)	2%	15%	12%	14%	24%	18%	16%
With Extended Family (relatives, parents)	2%	15%	20%	9%	4%	0%	8%
With Colleagues/Co-workers	1%	4%	8%	2%	9%	10%	6%
Member of a Tour Group	6%	0%	2%	0%	1%	12%	1%
Sports Team Members, Classmates, Peers etc.	0%	0%	2%	0%	0%	2%	0%
Passenger	0%	0%	2%	0%	0%	0%	0%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? (By purpose of visit)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Did not Spend the Night	46%	25%	4%	43%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	37%	10%	76%	27%
Private Home of a Friend or Relative (non-paid accommodation)	6%	50%	7%	18%
Personal Home/Apartment - (non-paid accommodation)	5%	12%	4%	6%
Rented House/Apartment - tourist	3%	0%	7%	3%

rents the entire property				
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	3%	1%	3%	2%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	0.1%	1%	0%	1%
Secondary Residence - Summer House	0.3%	3%	0%	1%
Campsite, Caravan Site or Trailer Park (providing some tourist services – shop, information, recreation activities)	1%	0%	1%	1%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	1%	0.2%	0%	1%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	1%	0%	0%	0.4%
Public Means of Transport with Sleeping Accommodation (train, ship, boat)	1%	0.2%	0%	0.2%
Work and Holiday Camps (scout camps, mountain shelters, archeological camps, children's camps, volunteer camps, etc.)	0%	0%	2%	0.1%
Health-related Establishments	0%	0%	0%	0%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Did not Spend the Night	53%	30%	48%	47%	11%	2%	5%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	36%	14%	17%	9%	45%	70%	53%
Private Home of a Friend or Relative (non-paid accommodation)	2%	37%	29%	34%	20%	4%	7%

Personal Home/Apartment - (non-paid accommodation)	6%	18%	0.2%	3%	3%	9%	7%
Rented House/Apartment - tourist rents the entire property	1%	1%	2%	2%	2%	5%	21%
Guesthouse/B&B(and similar establishments providing limited hotel services including daily bed-making and cleaning)	1%	2%	0%	1%	5%	25%	11%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	0.3%	1%	0%	1%	0%	0%	0%
Secondary Residence - Summer House	0.3%	1%	2%	2%	1%	0%	0%
Campsite, Caravan Site or Trailer Park (providing some tourist services – shop, information, recreation activities)	1%	0%	0%	1%	11%	4%	0%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	0%	0.4%	0%	1%	2%	6%	1%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	0%	0%	0%	1%	3%	3%	1%
Public Means of Transport with Sleeping Accommodation (train, ship, boat)	0%	1%	1%	0%	1%	0%	0%
Work and Holiday Camps (scout camps, mountain shelters, archeological camps, children's camps, volunteer camps, etc.)	0%	0%	0%	1%	0%	0%	0%
Health-related Establishments	0%	0%	0%	0.1%	0%	0%	0%

**Means of Transport Used for Arrival** - Please tell me, with which means of transport did you arrive in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Bus/Minibus	75%	57%	24%	61%
Private Vehicle	7%	23%	10%	17%
Rented Vehicle	2%	6%	5%	5%
Trailer	0%	0%	0%	0.2%
Foreign Airline	12%	6%	50%	11%
Georgian Airways/Airzena	2%	4%	10%	3%
Train	1%	4%	1%	2%
Public Vessel – Yacht/Ship/Ferry/Boat	0%	1%	0.1%	0.4%
Walking	0%	1%	0%	0.1%
No Answer	0.4%	0%	0%	0.3%

**Means of Transport Used for Arrival** - Please tell me, with which means of transport did you arrive in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Bus/Minibus	93%	39%	50%	49%	7%	2%	17%
Private Vehicle	1%	14%	34%	36%	25%	2%	5%
Rented Vehicle	1%	4%	11%	10%	0%	1%	1%
Trailer	1%	0%	0%	0%	0%	0%	0%
Foreign Airline	3%	26%	0%	1%	59%	69%	63%
Georgian Airways/Airzena	1%	10%	0%	0.2%	9%	18%	15%
Train	0%	2%	3%	3%	0%	8%	0%
Public Vessel – Yacht/Ship/Ferry/Boat	0%	4%	0%	0%	0%	0%	0%
Walking	0%	0%	0%	1%	0%	0%	0%
No Answer	0.3%	0%	1%	0%	0%	1%	0%

## MAIN PURPOSE AND MAJOR INTERESTS IN TRAVELING TO GEORGIA

**Main Purpose of Visit** - Please tell me, what was the main purpose of your current visit to Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other	All Visitors
Leisure/Recreation/Vacation	73%	12%	7%	16%	49%	61%	39%	40%
Visiting Relatives	3%	37%	22%	38%	6%	2%	2%	18%
Shopping, Buying Goods with the Aim of Consumption	8%	4%	10%	14%	0%	0%	0%	9%
Transit on the Way to Another Country	2%	29%	20%	3%	13%	4%	14%	9%
Business or Professional	2%	8%	14%	2%	24%	30%	36%	8%
Visiting Friends	7%	7%	9%	10%	3%	2%	3%	8%
Buying Goods with the Aim of Resale	1%	0%	9%	2%	0%	0%	0%	2%
Personal Reason	0.3%	2%	4%	5%	0%	0%	0%	2%
Education or Training	0%	0%	4%	5%	1%	2%	2%	2%
Health-related Establishments	0%	0.4%	0%	4%	0%	0%	0%	1%
Visit to Second Home	0%	0.4%	1%	1%	0%	0%	0%	1%
Employment	1%	0%	0%	1%	4%	0%	3%	1%
Refused to Answer	4%	0%	0%	0%	0%	0%	0%	1%

**Medical Treatment in Georgia** - You have mentioned that the purpose of your visit to Georgia was for medical or health reasons. Could you please tell me what type of treatment or surgery you have received and where? *(Overall picture)*

	N	Location
Surgical Operation/Procedure	2 respondents	Tbilisi - 2 respondents
Consultation with Physician	4 respondents	Tbilisi – 4 respondents
Medical Examination (analysis, x-ray, ultrasound, tomography, etc.)	7 respondents	Tbilisi – 7 respondents
Diagnosis/Treatment of Tuberculosis	2 respondent	Tbilisi – 2 respondents

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*International visitors with leisure/recreation/vacation purpose N=414*)

Yes	5%
No	95%

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*By country of residence for international visitors with leisure/recreation/vacation purpose (N=414)*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	4%	4%	0%	0%	22%	10%	18%
No	96%	96%	100%	100%	78%	90%	82%

**Winter Tourism** - Did you come to Georgia to undertake winter activities - whether or not you actually participated in such activities? (*International visitors with leisure/recreation/vacation purpose N=414*)

Yes	1%
No	99%

**Winter Tourism** - Did you come to Georgia to undertake winter activities - whether or not you actually participated in such activities? (*By country of residence for international visitors with leisure/recreation/vacation purpose (N=414)*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	1%	0%	0%	0%	2%	2%	0%
No	99%	100%	100%	100%	98%	99%	100%

**Employment in Georgia** - Concerning your employment, are/were you being paid by a resident Georgian company, the Georgian Government or foreign business registered in Georgia? (*International tourists with employment purpose of visit N=11*)

Yes	6 resp.
No	5 resp.



**MICE Tourism** - Was your primary reason for visiting Georgia on this trip any of the following? (*International tourists with business or professional purpose of visit N=136*)

Corporate/Business Meeting, Seminar, Workshop or Presentation	55%
Conference, Congress, Forum	7%
Incentive Tour Organized by a Business	3%
Exhibition/Trade Fair	8%
I have not participated in any type of event	28%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	0.1%	39%	44%	26%
Rest and Relaxation	46%	25%	11%	29%
Tasting Georgian Cuisine	28%	26%	50%	24%
Experiencing Georgia's Nature/Scenery/ Landscape	27%	15%	17%	17%
Exploring Georgia's Architecture	33%	4%	13%	16%
Tasting Georgian Wine	17%	16%	36%	15%
Shopping	7%	11%	5%	14%
Visiting Georgia's Historical Sites	19%	5%	24%	12%
Experiencing Georgian Hospitality	12%	10%	21%	9%
Experiencing Georgia's Nightlife and Entertainment	5%	4%	1%	4%
Experiencing Georgia's Culture and Folklore	5%	1%	6%	3%
Undertaking Outdoor Adventurous Activities	3%	0.2%	2%	2%
I Don't Know/Hard to Answer	0%	2%	0%	1%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	4%	41%	48%	40%	25%	14%	32%
Rest and Relaxation	37%	29%	11%	28%	33%	37%	25%
Tasting Georgian Cuisine	7%	39%	40%	17%	53%	72%	54%
Experiencing Georgia's Nature/Scenery/Landscape	55%	26%	15%	17%	63%	68%	45%
Exploring Georgia's Architecture	27%	6%	8%	4%	28%	26%	22%
Tasting Georgian Wine	5%	25%	16%	13%	45%	59%	43%
Shopping	11%	9%	14%	24%	5%	9%	10%
Visiting Georgia's Historical Sites	6%	13%	13%	6%	41%	55%	39%
Experiencing Georgian Hospitality	7%	15%	8%	4%	28%	37%	26%
Experiencing Georgia's Nightlife and Entertainment	7%	1%	1%	2%	4%	6%	6%
Experiencing Georgia's Culture and Folklore	1%	2%	1%	3%	19%	20%	11%
Undertaking Outdoor Adventurous Activities	1%	0.3%	1%	2%	8%	13%	4%
I Don't Know/Hard to Answer	0.3%	0%	0%	3%	0%	0%	0%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	0.1%	34%	20%	22%
Experiencing Georgia's Nature/Scenery/Landscape	68%	23%	37%	39%
Tasting Georgian Cuisine	28%	34%	75%	30%
Rest and Relaxation	42%	25%	14%	26%
Shopping	14%	17%	15%	21%
Tasting Georgian Wine	19%	18%	51%	18%
Exploring Georgia's Architecture	34%	4%	23%	17%
Experiencing Georgian Hospitality	12%	12%	32%	11%

Visiting Georgia's Historical Sites	17%	5%	30%	11%
Experiencing Georgia's Nightlife and Entertainment	6%	4%	3%	5%
Experiencing Georgia's Culture and Folklore	3%	1%	10%	3%
Undertaking Outdoor Adventurous Activities	2%	0.3%	2%	1%
I Don't Know/Hard to Answer	0%	2%	0%	1%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	3%	36%	42%	35%	17%	8%	19%
Experiencing Georgia's Nature/Scenery/Landscape	55%	31%	13%	23%	59%	74%	53%
Tasting Georgian Cuisine	7%	47%	45%	29%	68%	88%	69%
Rest and Relaxation	29%	31%	10%	27%	33%	36%	26%
Shopping	19%	19%	14%	32%	14%	24%	21%
Tasting Georgian Wine	5%	34%	17%	14%	59%	76%	53%
Exploring Georgia's Architecture	28%	8%	8%	4%	33%	31%	26%
Experiencing Georgian Hospitality	7%	18%	8%	4%	34%	50%	36%
Visiting Georgia's Historical Sites	5%	17%	9%	2%	44%	64%	48%
Experiencing Georgia's Nightlife and Entertainment	8%	2%	1%	2%	5%	7%	12%
Experiencing Georgia's Culture and Folklore	0.3%	3%	0.2%	3%	11%	22%	13%
Undertaking Outdoor Adventurous Activities	0.4%	0.3%	0.2%	1%	6%	12%	6%
I Don't Know/Hard to Answer	0.3%	0%	0%	3%	0%	0%	0%

**Popular Locations** - Please tell me which locations, sites and/or attractions you visited in Georgia during this visit? (*Overall picture*)

	%	Average Number of Nights
Tbilisi	41%	2
Batumi (Kvariati, Botanical Garden, Gonio Fortress)	40%	0
Rustavi	8%	0
Marneuli	7%	2
Mtskheta (Svetitskhoveli Cathedral, Jvari Monastery, Armazi Fortress, Samtavro, Pompey's Bridge)	4%	0
Kazbegi (Gergeti Trinity Church)	3%	1
Lagodekhi (National Park)	3%	0
Kutaisi (Gelati Monastery, Bagrat's Cathedral, Tskaltubo Caves)	2%	1
Sighnaghi (Bodbe Monastery)	2%	0
Gori (Stalin's Museum, Gori Fortress)	2%	1
Telavi (King Erekle's Museum and Palace, Tsinandali Palace)	2%	1
Kabali	1%	0
Borjomi (Likani, Mineral Waters, Green Monastery, Timotesubani, National Park)	1%	1
Dmanisi (Dmanisi Museum- Archeological Monument)	1%	5
Kobuleti	1%	1
Bolnisi (Bolnisi Sioni Church)	1%	5
Gardabani	1%	0
Mestia & Ushguli	1%	2
David Gareja	1%	1
Gudauri	1%	1
Zugdidi (Dadiani's Palace)	1%	1
Vardzia (Vanis Kvabebi, Sapara, Khertvisi)	1%	<sup>2</sup>
Bakuriani (Kokhtagora, Didveli)	0.4%	
Ananuri (Church and Zhinvali Reservoir)	0.3%	
Tusheti	0.3%	
Kvareli (Nekresi, Kvareli Lake, Ilia Chavchavadze's Museum)	0.2%	
Shovi & Utsera (Mineral Waters, Shaori Lake, Nikortsminda Church)	0.1%	
Shatili & Muco	0.1%	
Other Samegrelo	1%	
Other Shida Kartli	1%	

<sup>2</sup> Average number of nights for Vardzia, Bakuriani, Ananuri, Tusheti, Kvareli, Shovi & Utsera, Shatili & Mutco are not presented since due to the small sample size it is not statistically recommended.

Other Samtskhe-Javakheti	1%	
Other Kakheti	0.4%	
Other Imereti	0.3%	
Other Guria	0.1%	
None - Transit	5%	n/a

## EXPENDITURE DURING TRAVEL IN GEORGIA

### **Expenditure Structure**

Number of Total Visitors	1,013,216
Total Expenditure	GEL 398,193,888
Expenditure per Visitor	GEL 393

### **Expenditures by Purpose of Visit**

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Leisure/ Recreation/ Vacation	40%	GEL 184,810,416	405,286	GEL 456
Visiting Friends and Relatives	24%	GEL 64,926,924	243,172	GEL 267
Business or Professional	8%	GEL 74,896,668	81,057	GEL 924
Other	27%	GEL 73,558,880	283,701	GEL 270

### **Expenditures by Country of Residence**

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Turkey	39%	GEL 138,303,900	395,154	GEL 350
Russia	9%	GEL 39,940,782	91,189	GEL 438
Armenia	17%	GEL 27,559,520	172,247	GEL 160
Azerbaijan	24%	GEL 61,036,172	243,172	GEL 251
Central and Eastern Europe	4%	GEL 30,842,569	40,529	GEL 761
Other Europe	3%	GEL 44,499,744	30,396	GEL 1464
Other	4%	GEL 56,011,201	40,529	GEL 1327

**Expenditure on Services** - Please tell me how much you have spent on the items listed during this visit to Georgia (excluding those services included in the tour package)?

	Total Expenditure	Share of Total Expenditure
Served Food and Drinks	GEL 99,548,472	25%
Accommodation	GEL 99,548,472	25%
Shopping	GEL 87,602,655	22%
Cultural and Entertainment Services	GEL 15,927,756	4%
Domestic Ground Transportation	GEL 39,819,389	10%
Sports and Recreational Services	GEL 15,927,756	4%
Tour Package	GEL 23,891,633	6%
Medical Services	GEL 3,981,939	1%
Domestic Air Transportation	GEL 796,388	0.2%
Other Expenditure	GEL 11,149,428	4%

## ORGANIZER OF VISITS TO GEORGIA AND INFORMATION SOURCES ABOUT GEORGIA

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Myself	72%	67%	28%	64%
Family Members/Friends	15%	31%	3%	18%
My Business/Company	8%	2%	61%	9%
Foreign Travel Agency/ Tour Operator	3%	0.2%	1%	1%
Sports Committee	0%	0%	3%	0.2%
Other	1%	0%	4%	1%
Did not Plan - Transit	1%	0%	0%	7%

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Myself	76%	59%	35%	72%	41%	51%	60%
Family Members/Friends	10%	14%	35%	21%	28%	12%	9%
My Business/Company	9%	8%	11%	4%	20%	19%	19%
Foreign Travel Agency/ Tour Operator	2%	0.4%	0%	0%	2%	13%	3%
Sports Committee	0%	0%	1%	0%	0%	0%	0%
Other	1%	0%	3%	0%	3%	3%	3%
Did not Plan - Transit	2%	19%	17%	3%	6%	3%	6%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I Don't Remember	24%	8%	2%	15%
Previous Visit	28%	62%	34%	45%
Friends & Relatives	34%	49%	28%	38%
Television/Radio	17%	5%	14%	12%
Organization/Business Partner	2%	0.3%	63%	7%
Internet	7%	1%	10%	4%
Specialized Tourism, Travel or Special Interest Magazine	3%	1%	4%	2%
Newspaper/Other Magazine	4%	1%	3%	2%
Travel Guidebook	2%	0%	2%	1%
Travel Agency/Tour Operator	2%	0.1%	0.4%	1%
Books	2%	1%	3%	1%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	1%	0.1%	0.4%	0.4%



**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I Don't Remember	29%	8%	5%	8%	5%	3%	0%
Previous Visit	23%	57%	70%	69%	35%	30%	18%
Friends & Relatives	34%	48%	67%	23%	37%	28%	34%
Television/Radio	16%	11%	20%	0%	17%	10%	10%
Organization/Business Partner	2%	9%	16%	1%	22%	24%	32%
Internet	1%	3%	1%	0.2%	31%	27%	25%
Specialized Tourism, Travel or Special Interest Magazine	1%	2%	1%	0%	13%	12%	8%
Newspaper/Other Magazine	4%	3%	0%	0%	7%	10%	3%
Travel Guidebook	1%	0%	0%	0%	6%	6%	4%
Travel Agency/Tour Operator	1%	0%	0%	0%	2%	10%	3%
Books	1%	1%	1%	0%	4%	10%	4%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	1%	0.1%	0%	0%	0%	3%	3%

**Websites and Portals Used to Obtain Information on Georgia** - Please tell me from which travel-related websites you obtained information about Georgia? *(Overall picture – N=83)*

I cannot recall any specific website	24%	<a href="http://www.expedia.com">www.expedia.com</a>	3%
<a href="http://www.lonelyplanet.com">www.lonelyplanet.com</a>	34%	<a href="http://www.wikipedia.org">www.wikipedia.org</a>	2%
<a href="http://www.kaukaz.pl">www.kaukaz.pl</a>	18%	<a href="http://www.tourguide.com">www.tourguide.com</a>	1%
<a href="http://www.wikitavel.org">www.wikitavel.org</a>	15%	<a href="http://www.medraft.com">www.medraft.com</a>	1%
<a href="http://www.info-tbilisi.ge">www.info-tbilisi.ge</a>	15%	<a href="http://www.booking.com">www.booking.com</a>	1%
<a href="http://www.georgia.travel">www.georgia.travel</a>	13%	<a href="http://www.hostelworld.com">www.hostelworld.com</a>	1%
<a href="http://www.tripadvisor.com">www.tripadvisor.com</a>	12%	<a href="http://www.travelspan.com">www.travelspan.com</a>	1%
<a href="http://www.map.ge">www.map.ge</a>	8%	<a href="http://www.nationalpark.ge">www.nationalpark.ge</a>	1%
<a href="http://www.worldtravelguide.com">www.worldtravelguide.com</a>	6%	Other	4%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	3%	1%	10%	3%
No	97%	99%	90%	97%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	1%	6%	0%	0%	13%	21%	9.5%
No	99%	94%	100%	100%	87%	79%	90.5%

**Train Tickets** - Please tell me whether your train tickets were purchased online (*By purpose of visit*)

	Total
No	100%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	1%	0%	3%	1%
No	99%	100%	97%	99%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	6%	7%	4%
No	100%	100%	100%	100%	94%	93%	96%

**Tour Package** - Please tell me whether your tour package was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0%	0%	0%	0%
No	100%	100%	100%	100%

**Tour Package** - Please tell me whether your tour package was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	0%	0%	1%
No	100%	100%	100%	100%	100%	100%	99%

## PROBLEMS ENCOUNTERED IN GEORGIA

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I have not Encountered any Problems	89%	97%	76%	91%
Transportation (roads/traffic)	4%	1%	6%	2%
Foreign Language Capacity	3%	1%	11%	2%
Public Toilets	2%	1%	3%	1%
Untidy/Dirty Streets, Parks, Squares	1%	0%	2%	1%
Information on Transport Timetables and Destinations	1%	0%	2%	1%
Navigation/Road Signs/Interpretation	1%	0.2%	2%	1%
Border Crossing	0%	0%	0%	1%
Lack of Tourism Informational Centers/Points	1%	0%	1%	1%
Lack of Tourist Maps	1%	0%	1%	1%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	1%	0.1%	0%	0.4%
Poor Service in Restaurants/Food Spots	1%	0%	0%	0.2%
Sanitary Conditions in Hotels and Restaurants	0.3%	0%	1%	0.2%
Lack of Foreign Language Menus	0.3%	0%	0.4%	0.1%
Other	5%	2%	8%	4%

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I have not Encountered any Problems	94%	89%	94%	97%	81%	70%	56%
Transportation (roads/traffic)	2%	4%	1%	0.4%	10%	5%	6%
Foreign Language Capacity	2%	0.4%	1%	0%	4%	10%	23%
Public Toilets	1%	0.4%	0%	0.2%	4%	9%	6%
Untidy/Dirty Streets, Parks,	0.4%	1%	0%	0%	1%	5%	5%

Squares							
Information on Transport Timetables and Destinations	0%	0.4%	0%	0%	3%	4%	4%
Navigation/Road Signs/Interpretation	1%	1%	0%	0.2%	2%	6%	2%
Border Crossing	0%	2%	0%	1%	0%	0%	0%
Lack of Tourism Informational Centers/Points	0%	1%	0%	0%	1%	5%	5%
Lack of tourist maps	0%	1%	0%	0%	3%	7%	5%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	0.3%	0%	0%	1%	1%	2%	1%
Poor Service in Restaurants/Food Spots	0.3%	0.4%	0%	0%	0%	2%	0%
Sanitary Conditions in Hotels and Restaurants	0.1%	0%	0%	0%	1%	2%	2%
Lack of Foreign Language Menus	0.1%	0%	0%	0%	0%	4%	0%
Other	2%	5%	4%	1%	5%	5%	18%

## SATISFACTION FROM THE TRIP TO GEORGIA AND PLANS FOR A FUTURE VISIT

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISSATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Very Satisfied	59%	65%	71%	62%
Satisfied	40%	30%	27%	35%
Dissatisfied	1%	0%	1%	1%
Very Dissatisfied	0.1%	0%	0%	0.2%
Average Satisfaction	3.6	3.7	3.7	3.6

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISSATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Very Satisfied	46%	74%	75%	67%	81%	81%	64%
Satisfied	53%	19%	22%	27%	15%	17%	36%
Dissatisfied	1%	2%	0%	1%	1%	0%	0%
Very Dissatisfied	0%	2%	0%	0%	0%	1%	0%
Average Satisfaction	3.5	3.7	3.8	3.7	3.8	3.8	3.6

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISSATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Georgian Wine	3.6	3.8	3.8	3.7
Environment/Landscape of Georgia	3.6	3.8	3.8	3.7
Georgian Cuisine	3.6	3.7	3.8	3.7
Historical and Cultural heritage	3.6	3.9	3.8	3.6
Georgian Hospitality	3.6	3.7	3.8	3.6
Restaurant Facilities and Service	3.4	3.5	3.6	3.4

Value for Money	3.3	3.5	3.3	3.4
Hotel Facilities and Service	3.4	3.2	3.5	3.3
Transport Services/ Infrastructure	3.2	3.4	3.3	3.3
Travel Agency / Tour Operator Service	3.2	3.5	3.4	3.2
Guesthouse/B&B Facilities and Services	3.3	3.8	3.5	3.2
Tourism Informational Centre Service	3.2	3.3	2.7	3.1

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISSATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Georgian Wine	3.5	3.9	3.9	3.9	3.9	3.8	3.8
Environment/Landscape of Georgia	3.5	3.9	3.9	3.7	3.9	3.8	3.8
Georgian Cuisine	3.5	3.9	3.9	3.8	3.9	3.7	3.6
Historical and Cultural heritage	3.5	4.0	4.0	3.9	3.9	3.8	3.8
Georgian Hospitality	3.5	3.9	3.8	3.7	3.8	3.9	3.8
Restaurant Facilities and Service	3.3	3.7	3.7	3.6	3.7	3.6	3.5
Value for Money	3.3	3.4	3.4	3.6	3.4	3.3	3.2
Hotel Facilities and Service	3.3	3.9	3.5	3.2	3.5	3.6	3.2
Transport Services/ Infrastructure	3.1	3.5	3.8	3.4	3.3	3.2	3.2
Travel Agency / Tour Operator Service	3.1	2.1	- <sup>3</sup>	4.0	3.5	3.6	3.7
Guesthouse/B&B Facilities and Services	3.3	4.0	-	3.0	3.1	3.5	3.0
Tourism Informational Centre Service	3.2	2.8	-	-	3.4	3.4	2.8

<sup>3</sup> Average number of satisfaction in some cases for travel agency / tour operator service, guesthouse/B&B facilities and services and tourism informational center service are not presented since due to the small sample size it is not statistically recommended.

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	74%	94%	86%	82%
Maybe	25%	6%	14%	17%
No	0.4%	0%	1%	1%

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	70%	86%	88%	98%	78%	67%	89%
Maybe	30%	14%	9%	3%	21%	31%	9%
No	0%	0%	2%	0%	1%	2%	2%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	71%	82%	86%	75%
Maybe	29%	18%	12%	24%
No	0.1%	0%	2%	1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	65%	82%	67%	91%	82%	86%	85%
Maybe	35%	16%	32%	9%	17%	13%	14%
No	0%	2%	1%	0%	1%	1%	1%



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# INTERNATIONAL VISITOR SURVEY – WAVES II+III REPORT

FINAL

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# **INTERNATIONAL VISITOR SURVEY – WAVES II+III REPORT**

FINAL

USAID ECONOMIC PROSPERITY INITIATIVE (EPI)

CONTRACT NUMBER: AID-114-C-10-00004

DELOITTE CONSULTING LLP

USAID/CAUCASUS

MONDAY, SEPTEMBER 17, 2012

## **DISCLAIMER:**

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

# DATA

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# ABSTRACT

ACT Research prepared this Second and Third Wave International Visitor Survey Report for Deloitte Consulting LLP in the framework of USAID-funded Economic Prosperity Initiative (EPI). The report represents the period July to December 2011.

The research was undertaken to create an annual set<sup>1</sup> of visitor surveys based on statistically valid templates and methodologies. The data produced is necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU - Eurostat) and United Nations World Tourism Organization (UNWTO) obligations.

Face to face interviews were conducted at a variety of border-crossing points (road, airport, port and railway) with 2133 international visitors leaving Georgia between August 26 and September 5, and November 30 and December 19, 2011.

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<sup>1</sup> Surveys are undertaken quarterly

# ABBREVIATIONS

ACT	ACT Research (Market Research & Consulting Company)
EPI	Economic Prosperity Initiative
EU	European Union
GDP	Gross Domestic Product
GEL	Georgian Currency - the Lari
GNTA	Georgian National Tourism Administration
MICE	Meetings, Incentives, Conferences & Exhibitions
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
Formal information sources	Information acquired from internet, media, tourist agencies etc.
Informal information sources	Information acquired from relatives, friends, and colleagues - word of mouth
Holiday-makers	Leisure, recreation or vacation tourists.
Neighboring countries	Turkey, Russia, Azerbaijan and Armenia
Tourist	A visitor who stays at least one night in a collective or private accommodation in the place/country visited.
Visitor	Any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.
Word of Mouth	Information received from friends, relatives, colleagues or other persons

# CONTENTS

- I. EXECUTIVE SUMMARY ..... 1
- II. APPENDICES..... 4
  - A. BACKGROUND ..... 5
  - B. METHODOLOGY ..... 6
  - C. FINDINGS..... 8

# I. EXECUTIVE SUMMARY

The International Visitor Survey was conducted to examine the behavior, satisfaction, expenditure and profile of international visitors to Georgia. This document reports on the second and third surveys (cumulatively) in a series of five quarterly international visitor surveys.

The survey results indicated that the socio-economic profile of the typical international visitor is a 25-34 years old (30%), hired employee (40%) male (69%). Most international visitors are residents of Georgia's neighboring countries; Armenia (25%), Azerbaijan (25%), Turkey (25%) and Russia (10%). Only 14% of international tourists surveyed were of Georgian descent, and predominantly came from Russia (40%) and 'Other' Europe (31%).

Between July and December 2011, 20% of international visitors came to Georgia for the first time. Of these visitors, 34% came to Georgia as holiday makers, while 21% travelled on business and 8% came to see friends and relatives.

The survey results indicated that the average international visitor has traveled to Georgia twice, although this number varied according to the purpose of visit. For example, visitors traveling to see friends and relatives made an average of seven trips, business travelers made three trips on average, while holiday makers travelled to Georgia only twice on average.

Georgia hosted residents of neighboring countries more often than visitors from other countries. For example, Azeri visitors had five trips on average, Turkish residents made an average of four trips, Armenian and Russian visitors each travelled twice on average, while travelers from other countries came only once.

Based upon the survey data, most visitors (74%) organized their own visits, while 4% used a travel agency. In general, the use of a travel agency to organize a visit to Georgia was quite low among all tourists regardless of country of residence, although 8% of visitors from the 'Other' Europe and 7% from 'Other' Countries worked with a travel agency.

In order to plan their travel, visitors relied on a variety of information sources such as 'word of mouth'. For instance, 30% of international visitors obtained information via 'word of mouth' from their friends and relatives, and 53% relied on data gathered from previous visits.

In addition to information gained via 'word of mouth', visitors from Central and Eastern Europe (32%), from 'Other' Countries (28%) and from 'Other' Europe (23%) relied on the Internet for information about Georgia. The most popular Internet websites among international visitors were [www.lonelyplanet.com](http://www.lonelyplanet.com), [www.georgia.travel](http://www.georgia.travel) and [www.wikitravel.com](http://www.wikitravel.com).

However, the Internet was not often utilized for booking travel arrangements; only 3% of international visitors purchased air tickets online, 0.2% booked train tickets via the Internet, and 0.8% booked accommodation online.

The majority of international visitors came to Georgia alone or with companions depending on the purpose of visit; those traveling on business (62%) or visiting friends and relatives (57%) tended to travel alone, while holiday makers (74%) traveled with companions.



Visitors from Central and Eastern Europe (32%), also from 'Other' countries (32%) often travelled with friends, while residents of Turkey (63%), Russia (52%) and 'Other' Europe (54%) mostly travelled alone.

The majority of international visitors (78%), used land transportation, such as minibus (38%) or a private vehicle (36%) to arrive in Georgia. However, 17% of international visitors arrived by plane and a small number arrived by train or a public vessel.

The survey data demonstrated that 36% of international visitors did not pay for accommodation but stayed with relatives or friends (25%), or in their personal or second home (10%).

However, 27% of international visitors spent a night in a hotel; this type of accommodation most popular among those from 'Other' Countries (39%) and 'Other Europe' (58%). Also, 66% of visitors travelling on business and 37% of holiday makers stayed in hotels.

The survey data indicated that 42% of visitors traveled to Georgia for leisure/recreation/vacation, while 25% arrived to visit friends and relatives. Only 6% of visitors were engaged with business and 6% came to Georgia to shop for themselves.

International visitors traveling in Georgia were interested in the following experiences: Georgian nature and scenery (42%), tasting Georgian cuisine (42%), rest and relaxation (42%), and tasting Georgian wine (29%).

Tbilisi was the most popular location for international visitors and attracted 44% of travelers while Batumi was visited by 37% of visitors. In addition, other popular destinations for international visitors included Kobuleti (8%), Marneuli (7%) and Rustavi (6%).

On average, visitors spent two nights in Tbilisi and Batumi and an average of five nights in a Black Sea resort such as Kobuleti or Ureki.

Between July and December 2011, a total of 1,714,854 international visitors came to Georgia and spent GEL 1,049,693,879 with an average expenditure per visitor of GEL 612. International visitors traveling for business had the highest average expenditure of GEL 1,056 per capita. Those visiting friends and relatives spent an average of GEL 484, while holiday makers spent GEL 746 per person on average.

Georgia's international visitors generated revenues in the following sectors: a) restaurants, food and beverage - GEL 304,411,225; b) hotels and accommodation - GEL 188,944,898; c) shopping – GEL 167,951,021; and d) domestic ground transportation - GEL 83,975,510.

The visitors surveyed, were asked to rate their experiences on a '4 Point Scale' where '1' indicates extreme dissatisfaction and '4' stands for great satisfaction. Visitors rated Georgia well overall (score of 3.7), although the least satisfied were those travelling for business (3.6), and visitors from Armenia (3.5) and 'Other' Countries (3.5). The following attractions received the best ratings: Georgian nature (3.8), historical and cultural heritage (3.8), Georgian wine (3.8), Georgian hospitality (3.7) and Georgian cuisine (3.7).

Visitors surveyed, gave the lowest ratings for Georgian infrastructure and transport services, as well as customer service at restaurants, cafes, hotels, travel agencies or tourist information centers. International visitors were also dissatisfied with value for money.

Problems during the visit in Georgia are related to the transportation, public toilets, foreign language capacity and high prices in general.

The vast majority (91%) of visitors were interested in traveling to Georgia again. Residents of Central and Eastern Europe (77%) are slightly less likely than other groups to be interested in returning.

The vast majority of visitors (86%) would recommend Georgia to friends and relatives. Residents of Armenia (81%) are slightly less likely to recommend the country.

## **II. APPENDICES**

**A. BACKGROUND**

**B. METHODOLOGY**

**C. FINDINGS**

## A. BACKGROUND

Tourism is a priority sector for EPI, and wine tourism and MICE tourism are priority value chains. A solid understanding of tourist behavior has been a significant factor in the success of many countries that have built tourism into a strong Gross Domestic Product (GDP) contributor. Such data is fundamental to sound policy formulation. However, simply measuring the contribution of tourism to the national economy is not enough. EPI's value chain assessment process and other research have pinpointed several important issues:

- Until recently, there has been limited availability of useful tourist data;
- The Georgian National Tourism Administration (GNTA) has undertaken tourism surveys in the past that have been neither comprehensive nor consistent in the methodology used.
- Georgia's tourism sector directly comprises suppliers of tourism products and services, tourist attractions, government entities, educational institutions and private sector associations. To build a complete picture of the tourism industry and define specific policy initiatives, it is critical to obtain and analyze data from many of these individuals and organizations. It is equally important for all of these value chain actors to benefit from a transparent tourism information system that can underpin broad input to policy making and enable better planning and implementation in all segments of society that are involved in the success of Georgian tourism.

GNTA and EPI are, in partnership, undertaking an annual visitor survey based on statistically valid methodologies that would produce the data necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU) and United Nations World Tourism Organization (UNWTO) obligations. The survey data collected will also be used for EPI Performance Monitoring purposes.

## B. METHODOLOGY

The main aim of the survey is to investigate the behavior, satisfaction, expenditure and profile of international visitors to Georgia.

The survey's objectives are to identify/gather data on the Socio-economic profile of international visitors; Repeat visitation; Purpose of visit; Locations visited by visitors; Main interests of visitors; Accommodations utilized; Transportation utilized; Visitor expenditure; Information sources utilized; Satisfaction of facilities, attractions and services; Problems encountered; and Intentions to return.

### RESEARCH METHODOLOGY

In order to study the above mentioned goals and objectives quantitative and qualitative research methodologies were used.

As a first stage of the project, the ACT project team familiarized themselves with background reading related to tourism data collection methodologies, classifications and categories. During this stage, the ACT project team also conducted interviews with regional tourist industry experts.

The ACT project team the conducted qualitative data collection by interviewing international visitors who were leaving Georgia. Face to face interviews were conducted at each type of border checkpoint (land, airport, railway and port). Overall, 2,133 visitors were interviewed between August 26 and September 5 (Wave II) and November 30 and December 19, 2011 (Wave III), and the typical interview length was between 10-12 minutes.

The ACT project team applied a stratified systematic sample method with the border checkpoint type taken as stratification variable. The final sampling unit was a resident of foreign country aged 15 years and over. The figure below presents the distribution of the interviews according to border checkpoint types:

Type	Border	Sample Size
Airport	Tbilisi Airport	538
Airport	Batumi Airport	82
Port	Port Batumi	86
Port	Port Poti	2
Railway	Railway Gardabani	41
Railway	Railway Sadakhlo	59
Land	Sadakhlo	305
Land	Sarpi	623
Land	Tsodna	100
Land	Red Bridge	297

Based on the methodology created with expert input, the survey data for Wave II was generalized for the period July to October 2011, and for Wave III, the period October to December 2011. The overall results of the survey, as well as the results according to purpose of visit and country of residence are provided.

Data according to purpose of visit – the survey results according to purpose of visit are analyzed separately for holiday/leisure/recreation visitors, those visiting friends/relatives and professional/business visits. Analysis for other purposes of visit is not listed separately due to the small sample size.

Data according to country of residence – survey results according to visitor citizenship are analyzed separately for neighboring countries – Turkey, Russia, Azerbaijan and Armenia. Other countries are grouped in two categories – Central and Eastern Europe and other Europe.

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” are grouped the following countries: Austria, Belgium, Croatia, Denmark, France, Germany, Greece, Ireland, Israel, Italy, Netherlands, Norway, Spain, Sweden, Switzerland and United Kingdom.

Those counties that were not grouped in any of the abovementioned country groups, due to the small sample, were consequently grouped as ‘Other’ Counties. These countries include: Argentina, Australia, Bangladesh, Canada, China, Egypt, Ghana, India, Iran, Iraq, Japan, Korea, Lebanon, Malaysia, Mexico, Nepal, New Zealand, Nigeria, the Philippines, South Africa, Sri Lanka, Syrian Arab Republic, Thailand, United Arab Emirates and USA.

## C. FINDINGS

### SOCIO-ECONOMIC PROFILE OF INTERNATIONAL VISITORS TO GEORGIA

**Country of Residence of International Visitors** - Please tell me, in which country do you currently live? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Azerbaijan	18%	30%	14%	25%
Armenia	28%	22%	14%	25%
Turkey	25%	25%	30%	25%
Russia	10%	14%	5%	10%
Iran	3%	0%	6%	2%
Ukraine	2%	1%	4%	2%
Poland	3%	0%	1%	1%
Germany	1%	1%	1%	1%
Israel	2%	1%	2%	1%
Italy	1%	1%	2%	1%
USA	1%	1%	3%	1%
Greece	1%	1%	0%	1%
United Kingdom	1%	1%	2%	1%
Czech Republic	1%	0%	1%	1%
Austria	1%	0%	1%	0.4%
France	0%	0%	2%	0.3%
Kazakhstan	0%	0%	1%	0.3%
Belarus	0%	0%	0%	0.2%
India	0%	0%	1%	0.2%
Spain	0%	0%	1%	0.2%
China	0%	0%	2%	0.2%
Nepal	0%	0%	1%	0.2%
Other	2%	1%	6%	2.0%

**Citizenship of International Visitors** - What is your country of citizenship? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Armenia	28%	22%	14%	25%
Azerbaijan	15%	26%	13%	23%
Turkey	24%	19%	30%	23%
Russia	12%	11%	5%	10%
Georgia	3%	17%	2%	6%
Iran	3%	0%	6%	2%
Ukraine	2%	1%	4%	2%
Poland	3%	0%	1%	1%
Israel	2%	0%	2%	1%
Germany	1%	0%	1%	1%
USA	1%	1%	3%	1%
Czech Republic	1%	0%	1%	1%
France	0%	0%	2%	0.4%
Greece	1%	0%	1%	0.4%
Italy	0%	0%	2%	0.4%
United Kingdom	1%	0%	2%	0.4%
Austria	0%	0%	1%	0.3%
Kazakhstan	0%	0%	1%	0.3%
Belarus	0%	0%	0%	0.2%
India	0%	0%	1%	0.2%
China	0%	0%	2%	0.2%
Nepal	0%	0%	1%	0.2%
Other	2%	1%	6%	1.8%

**International Visitors - Age Groups** - Could you please tell me your age? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
15 - 17	2%	0%	0%	1%
18 - 24	15%	10%	4%	12%
25 - 34	32%	28%	34%	30%
35 - 44	26%	22%	32%	25%
45 - 54	18%	23%	23%	21%
55 - 64	6%	14%	7%	9%
65 and Above	1%	2%	2%	2%



**International Visitors - Age Groups** - Could you please tell me your age? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
15 - 17	0%	2%	1%	0%	1%	0%	2%
18 - 24	8%	15%	9%	13%	26%	11%	19%
25 - 34	29%	26%	31%	31%	35%	27%	36%
35 - 44	30%	22%	23%	27%	18%	23%	25%
45 - 54	22%	22%	23%	21%	14%	22%	14%
55 - 64	9%	13%	12%	8%	4%	12%	5%
65 and Above	2%	2%	1%	1%	2%	5%	0%

**International Visitors – Gender** - *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Female	36%	35%	10%	31%
Male	64%	65%	90%	69%

**International Visitors – Gender** - *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Female	14%	45%	40%	25%	46%	47%	31%
Male	86%	55%	60%	75%	54%	53%	69%

**Employment Status of International Visitors - (By purpose of visit)**

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Hired Employee	48%	35%	46%	40%
Self-employed	17%	27%	29%	25%
Owner of a Business which Employs Others	6%	6%	21%	7%
Unemployed	4%	11%	1%	7%
Housewife/Unpaid Family Workers	7%	8%	0%	7%
Student	9%	4%	0%	6%
Pensioner/Retired	2%	5%	1%	3%
Other	1%	0%	0%	1%
Refused to Answer	5%	4%	3%	4%

**Employment Status of International Visitors - (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Hired Employee	32%	43%	41%	37%	52%	60%	43%
Self-employed	49%	20%	12%	24%	9%	12%	18%
Owner of a Business which Employs Others	7%	9%	8%	6%	5%	5%	10%
Unemployed	1%	3%	14%	10%	3%	1%	4%
Housewife /Unpaid Family Workers	1%	6%	13%	9%	5%	1%	3%
Student	3%	6%	4%	6%	20%	13%	17%
Pensioner / Retired	1%	7%	4%	2%	1%	4%	2%
Other	1%	2%	1%	0%	1%	0%	0%
Refused to Answer	5%	5%	3%	5%	3%	3%	2%

**Percentage of International Visitors with Georgian Ancestry - Do you have Georgian ancestry? (By purpose of visit)**

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Yes	12%	25%	13%	14%
No	88%	75%	87%	86%

**Percentage of International Visitors with Georgian Ancestry** - Do you have Georgian ancestry? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	15%	40%	3%	9%	13%	31%	9%
No	85%	60%	97%	91%	87%	69%	91%

## EXPERIENCE OF VISITING GEORGIA

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	34%	8%	21%	20%
2-3 Times	18%	7%	15%	13%
4-5 Times	7%	5%	7%	7%
6-10 Times	7%	11%	14%	9%
11 Times or More	27%	51%	29%	36%
I Don't Know/Hard to Answer	9%	18%	14%	16%
Average Number of Visits	2	7	3	2

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	16%	17%	13%	11%	58%	45%	63%
2-3 Times	7%	21%	18%	9%	19%	8%	16%
4-5 Times	3%	8%	11%	5%	5%	6%	6%
6-10 Times	6%	10%	13%	7%	6%	11%	4%
11 Times or More	30%	34%	44%	48%	11%	27%	9%
I Don't Know/Hard to Answer	37%	10%	0%	21%	1%	4%	3%
Average Number of Visits	4	2	2	5	1	1	1

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1<sup>st</sup> November 2010? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	69%	34%	43%	49%
2-3 Times	20%	23%	28%	23%
4-5 Times	2%	17%	6%	9%
6-10 Times	7%	10%	6%	8%
11 Times or More	2%	15%	18%	12%

Average Number <sup>2</sup> of Visits	1	3	2	1

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia 1<sup>st</sup> November 2010? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	35%	65%	51%	33%	79%	72%	77%
2-3 Times	17%	28%	26%	26%	19%	19%	16%
4-5 Times	12%	2%	9%	12%	1%	5%	2%
6-10 Times	16%	3%	6%	10%	1%	2%	1%
11 Times or More	20%	2%	8%	19%	0%	2%	3%
Average Number of Visits	3	1	1	3	1	1	1

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<sup>2</sup> Median Average

## DESCRIPTION OF CURRENT VISIT TO GEORGIA

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
1 Day	15%	26%	22%	31%
2-3 Days	18%	25%	39%	22%
4-5 Days	13%	8%	13%	9%
6-7 Days	9%	7%	7%	6%
8-14 Days	27%	16%	10%	17%
15-20 Days	7%	5%	3%	5%
21-30 Days	7%	8%	2%	5%
31 Days or More	6%	7%	6%	6%
Average Duration of Stay (Days)	7	3	3	3

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
1 Day	47%	14%	28%	39%	8%	7%	4%
2-3 Days	28%	8%	20%	29%	13%	10%	17%
4-5 Days	5%	8%	10%	10%	10%	6%	24%
6-7 Days	5%	7%	6%	4%	9%	11%	17%
8-14 Days	7%	23%	27%	8%	27%	29%	20%
15-20 Days	4%	8%	4%	3%	13%	10%	4%
21-30 Days	2%	11%	3%	4%	13%	12%	3%
31 Days or More	3%	20%	1%	5%	7%	16%	9%
Average Duration of Stay (Days)	2	12	4	2	10	11	6

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (*By purpose of visit*)

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Alone	26%	57%	62%	45%
With Friends	28%	19%	14%	23%
With Immediate Family Members (spouse, children under 18)	31%	16%	3%	20%
With Extended Family (relatives, parents)	16%	8%	2%	11%
With Colleagues/Co-workers	0.4%	0%	18%	2%
Member of a Tour Group	1%	0%	0.3%	1%
Sports Team Members, Classmates, Peers etc.	0.1%	0%	1%	0%

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Alone	63%	52%	28%	42%	36%	54%	41%
With Friends	26%	13%	21%	22%	32%	21%	32%
With Immediate Family Members (spouse, children under 18)	4%	19%	35%	23%	21%	16%	12%
With Extended Family (relatives, parents)	7%	16%	14%	12%	6%	4%	10%
With Colleagues/Co-workers	1%	1%	2%	1%	5%	3%	4%
Member of a Tour Group	0.2%	0%	2%	0%	1%	2%	3%
Sports Team Members, classmates, Peers etc.	0%	0.1%	0.3%	0.1%	0%	0%	0%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Did not Spend the Night	12%	18%	6%	24%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	37%	10%	66%	27%
Private Home of a Friend or Relative (non-paid accommodation)	21%	47%	14%	25%
Personal Home/Apartment - (non-paid accommodation)	8%	23%	4%	10%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	10%	0.8%	4%	5%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	10%	0.3%	1%	5%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	4%	1%	1%	4%
Rented House/Apartment - tourist rents the entire property	5%	1%	6%	3%
Secondary Residence - summer house	1%	3%	0.3%	1%
Campsite, Caravan site or trailer park (providing some tourist services – shop, information, recreation activities)	2%	0%	1%	1%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	1%	0%	0%	0.4%
Health-related Establishments – Sanatoriums, thermal resorts, spas etc.	0.4%	0%	0%	0.3%



**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Did not spend the night	34%	7%	27%	28%	5%	6%	2%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	29%	11%	21%	28%	32%	39%	58%
Private Home of a Friend or Relative (non-paid accommodation)	15%	47%	22%	32%	22%	15%	9%
Personal Home/Apartment - (non-paid accommodation)	11%	23%	6%	4%	10%	27%	10%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	3%	4%	4%	1%	27%	23%	10%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	1%	0.0%	16%	1%	2%	2%	1%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) railway, airport etc.	7%	9%	0.3%	1%	11%	2%	4%
Rented House/Apartment - tourist rents the entire property	1%	0.4%	3%	5%	7%	5%	10%
Secondary Residence - summer house	0.4%	3%	2%	1%	3%	3%	0%
Campsite, Caravan site or trailer park (providing some tourist services – shop, information, recreation activities)	0.2%	1%	0%	0%	7%	5%	0%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	0.2%	0%	0%	0%	2%	3%	1%
Health-related Establishments – Sanatoriums, thermal resorts, spas etc.	0%	0%	1%	1%	0%	0%	0%

**Means of Transport Used for Arrival** - Please tell me, with which means of transport did you arrive in Georgia? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Bus/Minibus	30%	47%	20%	38%
Private Vehicle	41%	28%	27%	36%
Rented Vehicle	4%	3%	2%	4%
Bicycle	0.3%	0%	0%	0.1%
Foreign Airline	14%	12%	39%	13%
Georgian Airline - Airzena	4%	5%	8%	4%
Train	5%	3%	4%	4%
Public Vessel – Yacht/Ship/Ferry/Boat	2%	2%	0.2%	1%

**Means of Transport Used for Arrival** - Please tell me via, with which means of transport did you arrive in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Bus/Minibus	54%	26%	36%	39%	12%	18%	29%
Private Vehicle	33%	13%	53%	50%	5%	9%	4%
Rented Vehicle	5%	6%	3%	3%	2%	1%	3%
Bicycle	0.2%	0%	0%	0%	1%	1%	1%
Foreign Airline	4%	33%	1%	2%	52%	52%	45%
Georgian Airline - Airzena	0.4%	10%	0.3%	0%	16%	18%	15%
Train	1%	6%	7%	5%	2%	1%	2%
Public Vessel – Yacht/Ship/Ferry/Boat	0.4%	7%	0.4%	0%	8%	1%	0.4%

## MAIN PURPOSE AND MAJOR INTERESTS IN TRAVELING TO GEORGIA

**Main Purpose of Visit** - Please tell me, what was the main purpose of your current visit to Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other	Total
Holiday/ Leisure/Recreation	42%	41%	47%	29%	64%	52%	53%	42%
Visiting Relatives	9%	30%	15%	22%	8%	21%	3%	16%
Transit on the Way to Another Country	8%	12%	11%	9%	9%	5%	4%	9%
Visiting Friends	16%	5%	6%	8%	6%	4%	6%	9%
Shopping, Buying Goods with the Aim of Consumption	3%	2%	6%	14%	1%	1%	1%	6%
Business or Professional	8%	3%	4%	3%	12%	14%	24%	6%
Employment	12%	2%	1%	1%	2%	2%	2%	4%
Buying Goods with the Aim of Resale	1%	2%	7%	6%	0%	0%	0%	4%
Education or Trainings	1%	0%	2%	3%	0%	0%	4%	2%
Health and Medical Care	0%	2%	0%	4%	0%	1%	0%	1%
Personal Reason	0%	2%	1%	2%	0%	0%	0.4%	1%
Visit to Second Home	0%	0%	1%	0%	0%	1%	0%	0.3%
Religion or Pilgrimage	0%	0%	0%	0%	0%	0%	0.4%	0%

**Medical Treatment in Georgia** - You have mentioned that the purpose of your visit to Georgia was for medical or health reasons. Could you please tell me what type of treatment or surgery you have received and where? *(Overall picture)*

	N	Location
Medical Examination (analysis, x-ray, ultrasound, tomography, etc.)	10 respondents	Tbilisi – 8 respondents Marneuli – 1 respondent Refused to Answer - 1 respondent
Consultation with Physician	5 respondents	Tbilisi – 3 respondents Lagodekhi – 1 respondent Refused to Answer - 1 respondent
Recovery/Rehabilitation	4 respondents	Borjomi - 1 respondent Kutaisi - 1 respondent Sairme - 1 respondent Tskhaltubo - 1 respondent
Childbirth/Hysterectomy/Gynecological	2 respondents	Tbilisi – 1 respondent Marneuli – 1 respondent
Surgical Operation/Procedure	1 respondents	Tbilisi - 1 respondent

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*International visitors with leisure/recreation/vacation purpose N=772*)

Yes	9%
No	91%

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*By country of residence for international visitors with leisure/recreation/vacation purpose N=772*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	3%	6%	10%	14%	13%	9%	10%
No	97%	94%	90%	86%	87%	91%	90%

**Employment in Georgia** - Concerning your employment, are/were you being paid by a resident Georgian company, the Georgian Government or foreign business registered in Georgia? (*International tourists with employment purpose of visit*)

Yes	16%
No	69%
Refused to Answer	15%

**MICE Tourism** - Was your primary reason for visiting Georgia on this trip any of the following? (*International tourists with business or professional purpose of visit N=52*)

I have not Participated in any Type of Event	53%
Corporate/Business Meeting, Seminar, Workshop or Presentation	38%
Conference, Congress, Forum	6%
Incentive Tour Organized by a Business	2%
Exhibition/Trade Fair	1%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? (*By purpose of visit*)

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Didn't Have any Interest	1%	28%	30%	22%
Experiencing Georgia's Nature/Scenery/ Landscape	69%	29%	36%	42%
Tasting Georgian Cuisine	54%	45%	43%	42%
Rest and Relaxation	71%	35%	21%	42%
Tasting Georgian Wine	41%	32%	33%	29%
Visiting Georgia's Historical Sites	37%	17%	19%	22%
Shopping	12%	17%	11%	18%
Exploring Georgia's Architecture	29%	12%	12%	17%
Experiencing Georgian Hospitality	19%	15%	15%	15%
Experiencing Georgia's Nightlife and Entertainment	15%	11%	5%	10%
Experiencing Georgia's Culture and Folklore	12%	9%	7%	8%
Undertaking Outdoor Adventurous Activities	7%	7%	2%	5%
I Don't Know/Hard to Answer	0.1%	0%	2%	1%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't Have any Interest	27%	11%	22%	28%	12%	12%	11%
Experiencing Georgia's Nature/Scenery/Landscape	34%	55%	43%	34%	65%	51%	57%
Tasting Georgian Cuisine	19%	64%	49%	42%	53%	54%	51%
Rest and Relaxation	45%	50%	39%	35%	44%	48%	47%
Tasting Georgian Wine	16%	46%	33%	24%	44%	49%	33%
Visiting Georgia's Historical Sites	14%	35%	29%	7%	45%	39%	34%
Shopping	14%	17%	19%	24%	16%	9%	11%
Exploring Georgia's Architecture	11%	26%	27%	4%	37%	26%	22%
Experiencing Georgian Hospitality	9%	24%	10%	15%	31%	26%	20%
Experiencing Georgia's Nightlife and Entertainment	17%	9%	6%	4%	15%	13%	19%
Experiencing Georgia's Culture and Folklore	9%	7%	7%	2%	26%	20%	19%
Undertaking Outdoor Adventurous Activities	7%	2%	3%	1%	15%	12%	5%
I Don't Know / Hard to Answer	0.3%	0.1%	0.3%	1%	1%	1%	0%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? (*By purpose of visit*)

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Didn't Have any Interest	1%	29%	29%	23%
Experiencing Georgia's Nature/Scenery/ Landscape	54%	33%	48%	39%
Rest and Relaxation	67%	22%	31%	38%
Tasting Georgian Cuisine	69%	28%	18%	38%
Tasting Georgian Wine	42%	27%	36%	28%
Visiting Georgia's Historical Sites	35%	10%	17%	19%
Exploring Georgia's Architecture	11%	14%	14%	17%
Experiencing Georgian Hospitality	28%	7%	12%	15%
Experiencing Georgia's Nightlife and Entertainment	19%	10%	17%	14%
Shopping	14%	9%	7%	9%
Experiencing Georgia's Culture and Folklore	11%	3%	7%	6%
Undertaking Outdoor Adventurous Activities	6%	2%	2%	3%
I Don't Know/Hard to Answer	0.1%	0%	2%	1%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't Have any Interest	27%	15%	22%	29%	10%	11%	10%
Tasting Georgian Cuisine	12%	56%	48%	38%	57%	57%	54%
Experiencing Georgia's Nature/Scenery/Landscape	28%	51%	42%	30%	62%	50%	53%
Rest and Relaxation	38%	46%	38%	33%	42%	43%	45%
Tasting Georgian Wine	13%	46%	32%	23%	46%	49%	36%
Visiting Georgia's Historical Sites	8%	31%	27%	6%	42%	33%	28%
Shopping	11%	18%	17%	24%	17%	13%	14%
Exploring Georgia's Architecture	7%	20%	25%	4%	34%	24%	19%
Experiencing Georgian Hospitality	6%	23%	10%	14%	31%	26%	20%
Experiencing Georgia's Nightlife and Entertainment	14%	8%	5%	3%	15%	12%	19%
Experiencing Georgia's Culture and Folklore	4%	7%	6%	2%	24%	16%	17%
Undertaking Outdoor Adventurous Activities	2%	2%	3%	1%	15%	10%	4%
I Don't Know / Hard to Answer	0%	0%	0%	1%	1%	1%	0%



**Popular Locations** - Please tell me which locations, sites and/or attractions you visited in Georgia during this visit? (*Overall picture*)

	%	Average Number of Nights
Tbilisi	44%	2
Batumi	37%	2
Kobuleti	8%	5
Marneuli	7%	1
Rustavi	6%	1
Kutaisi	4%	1
Mtskheta	4%	n/a
Ureki	4%	5
Kazbegi	3%	2
Gori	3%	1
Lagodekhi	3%	n/a
Borjomi	2%	2
Bolnisi	2%	3
Sighnaghi	2%	n/a
Mestia & Ushguli	2%	3
Zugdidi	2%	1
Kabali	2%	n/a
Gardabani	1%	n/a
Telavi	1%	n/a
Dmanisi	1%	n/a
Bakuriani	1%	n/a
Ananuri	1%	n/a
Tusheti	1%	n/a
Vardzia	1%	n/a
Poti	1%	n/a
David Gareja	1%	n/a
Anaklia	1%	n/a
Uplistsikhe	1%	n/a
Other Kvemo Kartli	1.2%	n/a
Other Imereti	1.0%	n/a
Other Mtskheta-Tianeti	0.7%	n/a
Other Kakheti	0.7%	n/a
Other Racha Lechkumi - Kvemo Svaneti	0.4%	n/a
Other Samegrelo-Zemo Svaneti	0.4%	n/a
Other Guria	0.4%	n/a
Other Samtskhe-Javakheti	0.3%	n/a
Other Adjara	0.2%	n/a
Other Shida Kartli	0.2%	n/a

None	7%	
Refused to Answer	2%	

## EXPENDITURE DURING TRAVEL IN GEORGIA

### Expenditure Structure

Number of Total Visitors	1,714,854
Total Expenditure	GEL 1,049,693,879
Expenditure per Visitor	GEL 612

### Expenditures by Purpose of Visit

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Holiday/Leisure/ Recreation	42%	GEL 537,298,294	720,239	GEL 746
Visiting Friends and Relatives	25%	GEL 207,497,576	428,714	GEL 484
Business or Professional	6%	GEL 108,652,896	102,891	GEL 1056
Other	27%	GEL 196,245,113	463,010	GEL 424

### Expenditures by Country of Residence

	Total Expenditure	Number of Visitors	Expenditure per Visitor
Turkey	GEL 246,081,836	428,714	GEL 574
Russia	GEL 145,590,765	171,485	GEL 849
Armenia	GEL 191,635,158	428,714	GEL 447
Azerbaijan	GEL 146,620,188	428,714	GEL 342
Central and Eastern Europe	GEL 65,669,968	77,168	GEL 851
Other Europe	GEL 161,375,720	101,176	GEL 1595
Other	GEL 92,720,244	78,883	GEL 1175

**Expenditure on Services** - Please tell me how much you have spent on the items listed during this visit to Georgia (excluding those services included in the tour package)?

	Total Expenditures	Share of Total Expenditure
Served Food and Drinks	GEL 304,411,225	29%
Accommodation	GEL 188,944,898	18%
Shopping	GEL 167,951,021	16%
Cultural and Entertainment Services	GEL 73,478,572	7%
Domestic Ground Transportation	GEL 83,975,510	8%
Sports and Recreational Services	GEL 52,484,694	5%
Tour Package	GEL 31,490,816	3%

Medical Services	GEL 10,496,939	1%
Domestic Air Transportation	GEL2,099,388	0.2%
Other Expenditure	GEL 134,360,816	12.8%

## ORGANIZER OF VISITS TO GEORGIA AND INFORMATION SOURCES ABOUT GEORGIA

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Myself	80%	81%	48%	74%
Family Members/Friends	17%	18%	1%	14%
My Business/Company	1%	1%	48%	7%
Transit	0%	0%	0%	4%
Foreign Travel Agency/ Tour Operator	2%	0.2%	1%	1%
Georgian-based Travel Agency/ Tour Operator	1%	0%	0%	0.2%

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Myself	79%	80%	62%	81%	73%	75%	62%
Family Members/Friends	7%	11%	25%	15%	10%	6%	15%
My Business/Company	11%	4%	5%	2%	12%	10%	14%
Transit	3%	6%	6%	2%	2%	2%	1%
Foreign Travel Agency/ Tour Operator	0%	0%	1%	0%	2%	6%	6%
Georgian-based Travel Agency/ Tour Operator	0%	0%	0%	0%	0%	2%	1%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Previous Visit	39%	60%	47%	53%
Friends & Relatives	40%	27%	22%	30%
Internet	11%	1%	11%	6%
Television/Radio	6%	3%	7%	6%
Organization/Business Partner	0.4%	1%	25%	2%

Travel Guidebook	4%	0.1%	1%	2%
Newspaper/Other Magazine	2%	1%	2%	2%
Books	0.2%	1%	1%	1%
Travel Agency/Tour Operator	1%	0%	0%	1%
Specialized Tourism, Travel or Special Interest Magazine	1%	0%	0.3%	0.3%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0.2%	0.2%	2%	0.3%
Georgian Embassy/Consulate	0.3%	0%	0%	0.2%
Travel Fairs	0.3%	0%	0%	0.1%
I Don't Remember	16%	20%	13%	18%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Previous Visit	58%	55%	67%	52%	22%	28%	14%
Friends & Relatives	23%	30%	44%	16%	46%	32%	48%
Internet	5%	7%	0.4%	1%	32%	23%	28%
Television/Radio	1%	5%	15%	1%	10%	2%	10%
Organization/Business Partner	2%	1%	1%	1%	8%	7%	12%
Travel Guidebook	1%	1%	0%	0.1%	9%	14%	8%
Newspaper/Other Magazine	0.2%	2%	3%	0%	4%	1%	4%
Books	0%	4%	3%	0%	1%	1%	1%
Travel Agency/Tour Operator	0%	0%	0.3%	0%	0.3%	4%	5%
Specialized Tourism, Travel or Special Interest Magazine	0.2%	0%	0.3%	0%	2%	1%	1%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0.1%	0%	0.1%	0%	0%	2%	4%
Georgian Embassy/Consulate	0%	0%	0%	0%	2%	1%	0.4%
Travel Fairs	0%	0%	0%	0%	1%	1%	1%
I Don't Remember	14%	18%	10%	32%	9%	20%	9%

**Websites and Portals Used to Obtain Information on Georgia** - Please tell me from which travel-related websites you obtained information about Georgia? (Overall picture – N= 162)

I cannot recall any specific website	40%	www.expedia.com	3%
www.lonelyplanet.com	22%	www.map.ge	3%
www.georgia.travel	19%	www.worldtravelguide.com	2%
www.wikitravel.com	12%	www.museum.ge	1%
www.tripadvisor.com	8%	www.georgia.ge	1%
www.kaukaz.pl	8%	www.svaneti.com	1%
www.info-tbilisi.ge	4%	www.couchsurfing.com	1%
www.lametayel.co.	3%	www.inliberty.ru	1%
www.S7.ru	3%	www.svanetitrekking.ge	1%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (By purpose of visit)

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Yes	4%	3%	10%	3%
No	96%	97%	90%	97%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (By country of residence)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	1%	6%	0%	0%	19%	19%	11%
No	99%	94%	100%	100%	81%	81%	89%

**Train Tickets** - Please tell me whether your train tickets were purchased online (By purpose of visit)

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0.5%	0.0%	0.9%	0.2%
No	99.5%	100.0%	99.1%	99.8%

**Train Tickets** - Please tell me whether your train tickets were purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0.4%	0.4%	0%	1.0%	0.3%	1%
No	100%	99.6%	99.6%	100%	99%	99.7%	99%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By purpose of visit*)

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Yes	1.7%	0.1%	1.1%	0.8%
No	98.3%	99.9%	98.9%	99.2%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0.5%	0%	0.6%	0.3%	4%	4%	2%
No	99.5%	100%	99.4%	99.7%	96%	96%	98%

**Tour Package** - Please tell me whether your tour package was purchased online (*By purpose of visit*)

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0.2%	0.0%	0.3%	0.1%
No	99.8%	100.0%	99.7%	99.9%



**Tour Package** - Please tell me whether your tour package was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	0.3%	0.9%	0.4%
No	100%	100%	100%	100%	99.7%	99.1%	99.6%

## PROBLEMS ENCOUNTERED IN GEORGIA

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
I have not Encountered any Problems	78%	90%	73%	81%
Transportation (roads/traffic)	5%	3%	11%	6%
Public Toilets	5%	4%	5%	5%
Foreign Language Capacity	4%	2%	7%	4%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	3%	2%	2%	3%
Navigation/Road Signs/Interpretation	3%	1%	1%	2%
Poor Service in Restaurants/Food Spots	3%	2%	3%	2%
Information on Transport Timetables and Destinations	2%	1%	1%	2%
Untidy/Dirty Streets, Parks, Squares	2%	1%	2%	1%
Poor Service in Hotels/ Guesthouses	1%	1%	4%	1%
Lack of Tourism Informational Centers/Points	2%	0.4%	3%	1%
Lack of Tourist Maps	2%	0.3%	1%	1%
Border Crossing	1%	0.3%	1%	1%
Lack of Foreign Language Menus	1%	0.4%	1%	1%
Sanitary Conditions in Hotels and Restaurants	1%	0.6%	1%	1%
Cuisine	1%	0.5%	1%	1%
Other	6%	2.8%	10%	6%

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I have not Encountered any Problems	83%	75%	84%	86%	71%	73%	59%
Transportation (roads/traffic)	8%	6%	2%	5%	12%	9%	8%
Public Toilets	8%	7%	2%	1%	10%	10%	14%
Foreign Language Capacity	4%	1%	1%	2%	8%	14%	21%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	4%	1%	3%	2%	3%	4%	1%
Navigation/Road Signs/Interpretation	1%	0%	3%	1%	3%	3%	4%
Poor Service in Restaurants/Food Spots	1%	3%	2%	1%	5%	1%	5%
Information on Transport Timetables and Destinations	2%	3%	0%	1%	6%	3%	1%
Untidy/Dirty Streets, Parks, Squares	1%	3%	1%	1%	5%	3%	1%
Poor Service in Hotels/ Guesthouses	1%	0%	1%	2%	1%	2%	2%
Lack of Tourism Informational Centers/Points	1%	2%	0%	1%	2%	5%	1%
Lack of Tourist Maps	1%	2%	0%	0%	2%	5%	3%
Border Crossing	0%	2%	0%	2%	1%	1%	1%
Lack of Foreign Language Menus	1%	1%	0%	0%	3%	2%	2%
Sanitary Conditions in Hotels and Restaurants	0%	1%	0%	1%	1%	2%	1%
Cuisine	0%	0%	0%	1%	1%	0%	1%
Other	5%	8%	6%	1%	7%	12%	12%

## SATISFACTION FROM THE TRIP TO GEORGIA AND PLANS FOR A FUTURE VISIT

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Very Satisfied	69%	74%	63%	66%
Satisfied	28%	23%	33%	29%
Dissatisfied	1%	1%	2%	2%
I Don' t Know/Hard to Answer	2%	2%	2%	2%
Average Satisfaction	3.7	3.7	3.6	3.7

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Very Satisfied	67%	72%	48%	81%	69%	74%	53%
Satisfied	25%	23%	49%	17%	26%	20%	45%
Dissatisfied	3%	4%	0%	2%	4%	3%	1%
I Don' t Know/Hard to Answer	5%	0%	3%	1%	1%	3%	2%
Average Satisfaction	3.7	3.7	3.5	3.8	3.7	3.7	3.5

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality?  
*USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Environment/ Landscape of Georgia	3.8	3.9	3.8	3.8
Georgian Wine	3.7	3.8	3.8	3.8
Historical and Cultural Heritage	3.7	3.9	3.9	3.8
Georgian Cuisine	3.7	3.8	3.7	3.7
Georgian Hospitality	3.7	3.8	3.8	3.7
Guesthouse/B&B Facilities and Services	3.5	3.5	3.7	3.5
Restaurant Facilities and Services	3.4	3.6	3.6	3.4
Tourism Informational Centre Service	3.4	3.5	3.2	3.4
Travel Agency/Tour Operator Service	3.4	3.3	3.2	3.4
Hotel Facilities and Services	3.4	3.3	3.5	3.4
Value for Money	3.4	3.4	3.3	3.3
Transport Services/ Infrastructure	3.2	3.4	3.1	3.3

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality?  
*USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Environment/ Landscape of Georgia	3.8	3.8	3.7	3.9	3.9	3.8	3.7
Georgian Wine	3.8	3.9	3.6	3.9	3.8	3.7	3.7
Historical and Cultural Heritage	3.8	3.9	3.5	3.9	3.8	3.8	3.8
Georgian Cuisine	3.7	3.9	3.6	3.8	3.7	3.8	3.6
Georgian Hospitality	3.6	3.8	3.6	3.8	3.8	3.9	3.6
Guesthouse/B&B Facilities and Services	3.5	3.3	3.5	3.6	3.5	3.4	3.5
Restaurant Facilities and Services	3.5	3.4	3.4	3.4	3.4	3.5	3.3
Tourism Informational Centre Service	3.7	3.6	3.5	3.5	3.1	3.2	3.2

Travel Agency/Tour Operator Service	3.6	3.8	3.5	3.6	3.0	3.3	3.0
Hotel Facilities and Services	3.4	3.5	3.4	3.3	3.4	3.4	3.3
Value for Money	3.4	3.2	3.2	3.6	3.2	3.3	3.3
Transport Services/ Infrastructure	3.0	3.3	3.4	3.4	3.0	3.1	3.0

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Yes	92%	93%	88%	91%
Maybe	6%	7%	11%	9%
No	1%	1%	1%	1%

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	94%	90%	89%	95%	77%	81%	83%
Maybe	5%	10%	10%	5%	21%	16%	16%
No	1%	0.1%	1%	0.4%	3%	3%	1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By purpose of visit)*

	Holiday/ Leisure/ Recreation	Visiting Friends and Relatives	Business or Professional	Total
Yes	94%	90%	84%	86%
Maybe	5%	10%	15%	13%
No	1%	1%	0%	1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	88%	85%	81%	90%	87%	90%	84%
Maybe	11%	13%	19%	9%	8%	8%	15%
No	1%	2%	0%	1%	5%	1%	1%

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# INTERNATIONAL VISITOR SURVEY – WAVE II+III+IV REPORT

FINAL

Monday, September 17, 2012

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# **INTERNATIONAL VISITOR SURVEY – WAVE II+III+IV REPORT**

FINAL

USAID ECONOMIC PROSPERITY INITIATIVE (EPI)

CONTRACT NUMBER: AID-114-C-10-00004

DELOITTE CONSULTING LLP

USAID/CAUCASUS

MONDAY, SEPTEMBER 17, 2012

## **DISCLAIMER:**

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# DATA

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# ABSTRACT

ACT Research prepared this Second, Third and Fourth Wave International Visitor Survey Report for Deloitte Consulting LLP in the framework of USAID-funded Economic Prosperity Initiative (EPI). The report represents the period July 2011 to March 2012.

The research was undertaken to create an annual set<sup>1</sup> of visitor surveys based on statistically valid templates and methodologies. The data produced is necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU - Eurostat) and United Nations World Tourism Organization (UNWTO) obligations.

Face to face interviews were conducted at a variety of border-crossing points (road, airport, port and railway) with 3,159 international visitors leaving Georgia between August 26 and September 5, 2011, November 30 and December 19, 2011, and February 16 and March 1, 2012.

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<sup>1</sup> Surveys are undertaken quarterly

# ABBREVIATIONS/DEFINITIONS

ACT	ACT Research (Market Research & Consulting Company)
EPI	Economic Prosperity Initiative
EU	European Union
GDP	Gross Domestic Product
GEL	Georgian Currency - the Lari
GNTA	Georgian National Tourism Administration
MICE	Meetings, Incentives, Conferences & Exhibitions
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
Formal information sources	Information acquired from internet, media, tourist agencies etc.
Informal information sources	Information acquired from relatives, friends, and colleagues - word of mouth
Holiday-makers	Leisure, recreation or vacation tourists.
Neighboring countries	Turkey, Russia, Azerbaijan and Armenia
Tourist	A visitor who stays at least one night in a collective or private accommodation in the place/country visited.
Visitor	Any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.
Word of Mouth	Information received from friends, relatives, colleagues or other persons

# CONTENTS

I.	EXECUTIVE SUMMARY .....	1
II.	APPENDICES.....	3
A.	BACKGROUND .....	4
B.	METHODOLOGY .....	5
C.	FINDINGS.....	7

# I. EXECUTIVE SUMMARY

The International Visitor Survey was conducted to examine the behavior, satisfaction, expenditure and profile of international visitors to Georgia. This document reports on the cumulative results of the second, third and fourth surveys in a series of five quarterly international visitor surveys.

The survey results indicated that the socio-economic profile of the typical international visitor is a 25-34 year old (28%), male (73%), hired employee (37%). Most international visitors are residents of Georgia's neighboring countries; Turkey (28.9%), Azerbaijan (25.2%), Armenia (23.6%), and Russia (9.4%). Only 15% of international tourists surveyed were of Georgian descent, and predominantly came from Russia (45%) and 'Other Europe' (30%).

Between July 2011 and March 2012, 24% of international visitors came to Georgia for the first time. Of these visitors, 39% came to Georgia as holiday-makers, while 29% travelled on business and 10% came to see friends and relatives.

The survey results indicated that the average international visitor has traveled to Georgia three times, although this number varied according to the purpose of visit. For example, visitors traveling to see friends and relatives made an average of ten trips, business travelers made three trips on average, while holiday-makers travelled to Georgia twice on average.

Georgia hosted residents of neighboring countries more often than visitors from other countries. For example, Azeri visitors had ten trips on average, Armenians made an average of four trips, Russian visitors travelled three times, Turks twice and travelers from other countries came only once.

Based upon the survey data, most visitors (71%) organized their own visits, while only 1.2% used a travel agency or tour operator. In general, the use of a travel agency or tour operator to organize a visit to Georgia was quite low among all tourists regardless of country of residence, although 5% of visitors from the 'Other Europe' and 5% from 'Other' countries worked with a travel agency.

In order to plan their travel, visitors relied on a variety of information sources, such as 'word of mouth'. For instance, 29% of international visitors obtained information via 'word of mouth' from their friends and relatives, and 57% relied on information gathered from previous visits.

In addition to information gained via 'word of mouth', visitors from Central and Eastern Europe (25%), 'Other' countries (26%) and from 'Other Europe' (21%) relied on the Internet for information about Georgia. The most popular Internet websites among international visitors were [www.lonelyplanet.com](http://www.lonelyplanet.com), [www.georgia.travel](http://www.georgia.travel) and [www.wikitravel.com](http://www.wikitravel.com).

However, the Internet was not often utilized for booking travel arrangements; only 3% of international visitors purchased air tickets online, 0.2% booked train tickets via the Internet, and 1% booked accommodation online.

Half of all international visitors came to Georgia alone. Those traveling on business (63%) or visiting friends and relatives (58%) also tended to travel alone, while holiday-makers usually traveled with companions (61%).

Visitors from Central and Eastern Europe (28%), 'Other' countries (27%) and Armenia (25%) often travelled with friends, while residents of Turkey (72%), Russia (55%) and 'Other Europe' (56%) mostly travelled alone.

The majority of international visitors (78%) used land transportation, such as minibus (44%) or a private vehicle (31%) to arrive in Georgia. However, 16% of international visitors arrived by plane and a small number arrived by train (3%) or a public vessel (1%).

The survey data demonstrated that 34% of international visitors did not pay for accommodation but stayed with relatives or friends (23%), or in their personal or second home (11%).

However, 27% of international visitors spent a night in a hotel; this type of accommodation most popular among those from 'Other' countries (56%) and 'Other Europe' (39%). Also, 67% of visitors travelling on business and 40% of holiday-makers stayed in hotels.

The survey data indicated that 38.2% of visitors traveled to Georgia for leisure/recreation/vacation, while 25.5% arrived to visit friends and relatives. Only 7.5% of visitors were engaged in business and 7.9% came to Georgia to shop for themselves.

International visitors traveling in Georgia were interested in the following experiences: rest and relaxation (36%), tasting Georgian cuisine (35%), Georgian nature and scenery (31%), and tasting Georgian wine (24%).

Tbilisi was the most popular location for international visitors and attracted 43% of travelers while Batumi was visited by 38% of visitors. In addition, other popular destinations for international visitors included Marneuli (9%), Rustavi (7%) and Kobuleti (5%).

On average, visitors spent five nights in Kobuleti, three nights in Bolnisi, two nights in Tbilisi, Borjomi, Zugdidi, Kazbegi and Kutaisi, and one night in Batumi, Marneuli, Gori and Rustavi.

Between July 2011 and March 2012, a total of 2,326,587 international visitors came to Georgia and spent GEL 1,311,630,300 with an average expenditure per visitor of GEL 564. International visitors traveling for business had the highest average expenditure of GEL 1,009 per capita. Those visiting friends and relatives spent an average of GEL 442, while holiday-makers spent GEL 677 per person on average. The highest expenditures were from visitors of 'Other Europe' (GEL 1,493) and from 'Other' countries (GEL 1,317) and the lowest from Azeri visitors – GEL 333 on average.

Georgia's international visitors generated revenues in the following sectors: a) restaurants, food and beverage – GEL 367,256,484; b) hotels and accommodation - GEL 249,209,757; c) shopping – GEL 249,209,757; and d) domestic ground transportation - GEL 104,930,424.

The visitors surveyed, were asked to rate their experiences on a '4 Point Scale' where '1' indicates extreme dissatisfaction and '4' stands for great satisfaction. Visitors rated Georgia well overall (score of 3.7), although the least satisfied were visitors from Armenia (3.6). The following attractions received the best ratings: Georgian wine (3.8), Georgian environment/landscape (3.8), historical and cultural heritage (3.7), Georgian hospitality (3.7) and Georgian cuisine (3.7).

Visitors surveyed, gave the lowest ratings for infrastructure and transport services, travel agency and tour operator services, value for money, and services provided by information centers. Problems during the visit in Georgia were related to transportation, public toilets, foreign language capacity and high prices in general.

The vast majority (88%) of visitors were interested in traveling to Georgia again. Residents of Central and Eastern Europe (79%) are slightly less likely than other groups to be interested in returning.

The majority of visitors (82%) would recommend Georgia to friends and relatives. Residents of Armenia (76%) were slightly less likely to recommend the country.



## **II. APPENDICES**

- A. BACKGROUND**
- B. METHODOLOGY**
- C. FINDINGS**

## A. BACKGROUND

Tourism is a priority sector for EPI, and wine tourism and MICE tourism are priority value chains. A solid understanding of tourist behavior has been a significant factor in the success of many countries that have built tourism into a strong Gross Domestic Product (GDP) contributor. Such data is fundamental to sound policy formulation. However, simply measuring the contribution of tourism to the national economy is not enough. EPI's value chain assessment process and other research have pinpointed several important issues:

- Until recently, there has been limited availability of useful tourist data;
- The Georgian National Tourism Administration (GNTA) has undertaken tourism surveys in the past that have been neither comprehensive nor consistent in the methodology used.
- Georgia's tourism sector directly comprises suppliers of tourism products and services, tourist attractions, government entities, educational institutions and private sector associations. To build a complete picture of the tourism industry and define specific policy initiatives, it is critical to obtain and analyze data from many of these individuals and organizations. It is equally important for all of these value chain actors to benefit from a transparent tourism information system that can underpin broad input to policy making and enable better planning and implementation in all segments of society that are involved in the success of Georgian tourism.

GNTA and EPI are, in partnership, undertaking an annual visitor survey based on statistically valid methodologies that would produce the data necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU) and United Nations World Tourism Organization (UNWTO) obligations. The survey data collected will also be used for EPI Performance Monitoring purposes.

## B. METHODOLOGY

The main aim of the survey is to investigate the behavior, satisfaction, expenditure and profile of international visitors to Georgia.

The survey's objectives are to identify/gather data on the Socio-economic profile of international visitors; Repeat visitation; Purpose of visit; Locations visited by visitors; Main interests of visitors; Accommodations utilized; Transportation utilized; Visitor expenditure; Information sources utilized; Satisfaction of facilities, attractions and services; Problems encountered; and Intentions to return.

### RESEARCH METHODOLOGY

In order to study the above mentioned goals and objectives quantitative and qualitative research methodologies were used.

As a first stage of the project, the ACT project team familiarized themselves with background reading related to tourism data collection methodologies, classifications and categories. During this stage, the ACT project team also conducted interviews with regional tourist industry experts.

The ACT project team conducted qualitative data collection by interviewing international visitors who were leaving Georgia. Face to face interviews were conducted at each type of border checkpoint (land, airport, railway and port). Overall, 3,159 visitors were interviewed between August 26 and September 5, 2011 (Wave II), November 30 and December 19, 2011 (Wave III), and February 16 and March 01, 2012 (Wave IV). The typical interview length was between 10-12 minutes.

The ACT project team applied a stratified systematic sample method with the border checkpoint type taken as stratification variable. The final sampling unit was a resident of foreign country aged 15 years and over. The figure below presents the distribution of the interviews according to border checkpoint types:

Type	Border	Sample Size
Airport	Tbilisi Airport	798
Airport	Batumi Airport	134
Port	Port Batumi	128
Port	Port Poti	2
Railway	Railway Gardabani	61
Railway	Railway Sadakhlo	79
Land	Sadakhlo	447
Land	Sarpi	923
Land	Tsodna	150
Land	Red Bridge	437

Based on the methodology created with expert input, the survey data for Wave II, Wave III and Wave IV was generalized for the period July 2011 to March 2012. The overall results of the survey, as well as the results according to purpose of visit and country of residence are provided.

Data according to purpose of visit – the survey results according to purpose of visit are analyzed separately for holiday/leisure/recreation visitors, those visiting friends/relatives and professional/business visits. Analysis for other purposes of visit is not listed separately due to the small sample size.

Data according to country of residence – survey results according to visitor citizenship are analyzed separately for neighboring countries – Turkey, Russia, Azerbaijan and Armenia. Other countries are grouped in two 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” are grouped the following countries: Austria, Belgium, Croatia, Denmark, France, Germany, Greece, Ireland, Israel, Italy, Malta, Netherlands, Norway, Spain, Sweden, Switzerland and the United Kingdom.

Those counties that were not grouped in any of the abovementioned country groups, due to the small sample, were consequently grouped as ‘Other’ Counties. These countries include: Afghanistan, Argentina, Australia, Bangladesh, Brazil, Canada, China, Egypt, India, Indonesia, Iran, Iraq, Japan, Korea, Lebanon, Malaysia, Mexico, Nepal, New Zealand, Nigeria, Pakistan, the Philippines, Qatar, Saudi Arabia, South Africa, Sri Lanka, Syria, Thailand, United Arab Emirates and USA.

## C. FINDINGS

### SOCIO-ECONOMIC PROFILE OF INTERNATIONAL VISITORS TO GEORGIA

**Country of Residence of International Visitors** - Please tell me, in which country do you currently live? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	39.1%	20.1%	29.0%	28.9%
Azerbaijan	14.3%	33.0%	15.9%	25.2%
Armenia	22.2%	22.0%	13.9%	23.6%
Russia	7.9%	16.0%	6.3%	9.4%
Ukraine	2.2%	1.4%	4.9%	1.8%
Iran	2.2%	0.1%	5.3%	1.4%
Germany	1.1%	0.9%	1.8%	0.9%
Poland	2.2%	0.2%	0.7%	0.9%
Israel	1.2%	0.3%	1.7%	0.7%
Italy	0.7%	1.2%	1.0%	0.7%
USA	0.7%	0.6%	2.7%	0.7%
Greece	0.8%	0.6%	0.3%	0.5%
United Kingdom	0.4%	0.6%	2%	0.5%
Belarus	0.3%	0.6%	0.2%	0.4%
Czech Republic	0.8%	0.0%	1.4%	0.4%
Austria	0.4%	0.2%	0.9%	0.3%
France	0.2%	0.3%	1.7%	0.3%
Kazakhstan	0.3%	0.3%	0.3%	0.3%
India	0.1%	0.2%	0.9%	0.2%
Spain	0.1%	0.0%	0.6%	0.2%
Switzerland	0.1%	0.0%	0.9%	0.2%
China	0.1%	0.0%	1.9%	0.2%
Japan	0.3%	0.0%	0.3%	0.2%
Other	2.3%	1.1%	5.4%	1.7%

**Citizenship of International Visitors** - What is your country of citizenship? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	38.4%	16.5%	28.4%	27.6%
Azerbaijan	12.4%	30.0%	15.1%	23.4%
Armenia	22.1%	21.7%	14.4%	23.3%
Russia	9.2%	12.8%	5.9%	9.2%
Georgia	2.6%	13.4%	1.3%	4.9%
Ukraine	2.0%	1.3%	4.2%	1.6%
Iran	2.2%	0.4%	5.6%	1.5%
Poland	2.2%	0.2%	1.4%	1.0%
USA	0.7%	0.5%	3.4%	0.7%
Germany	1.0%	0.2%	1.6%	0.6%
Israel	1.2%	0.3%	1.3%	0.6%
Belarus	0.4%	0.4%	0.2%	0.4%
Czech Republic	0.8%	0.0%	1.0%	0.4%
Austria	0.3%	0.2%	0.9%	0.3%
France	0.2%	0.3%	1.9%	0.3%
Greece	0.4%	0.2%	0.5%	0.3%
Italy	0.2%	0.1%	1.2%	0.3%
Kazakhstan	0.3%	0.3%	0.4%	0.3%
United Kingdom	0.4%	0.1%	1.8%	0.3%
India	0.1%	0.2%	0.7%	0.2%
Switzerland	0.1%	0.0%	0.9%	0.2%
China	0.1%	0.0%	2.2%	0.2%
Japan	0.3%	0.0%	0.3%	0.2%
Other	2.4%	0.7%	5.4%	1.7%

**International Visitors - Age Groups** - Could you please tell me your age? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
15 - 17	1%	1%	0%	1%
18 - 24	18%	10%	5%	13%
25 - 34	32%	24%	31%	28%
35 - 44	26%	23%	31%	26%
45 - 54	16%	24%	25%	21%
55 - 64	6%	14%	7%	9%
65 and Above	1%	4%	1%	2%

**International Visitors - Age Groups** - Could you please tell me your age? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
15 - 17	0.3%	2%	1%	1%	1%	1%	1%
18 - 24	14%	13%	10%	12%	24%	10%	17%
25 - 34	29%	23%	29%	27%	33%	26%	36%
35 - 44	29%	24%	26%	27%	20%	23%	25%
45 - 54	20%	22%	22%	22%	16%	21%	15%
55 - 64	7%	12%	11%	9%	5%	13%	5%
65 and Above	1%	3%	2%	1%	2%	6%	0.3%

**International Visitors – Gender** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Male	70%	67%	87%	73%
Female	30%	33%	13%	27%

**International Visitors – Gender** - *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Male	89%	58%	64%	76%	58%	53%	71%
Female	11%	42%	36%	24%	42%	47%	29%

**Employment Status of International Visitors** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Hired Employee	39%	34%	48%	37%
Self-employed	23%	23%	27%	26%
Owner of a Business which Employs Others	5%	5%	22%	7%
Unemployed	4%	11%	1%	7%
Housewife/Unpaid Family Workers	6%	11%	0%	7%
Pensioner/Retired	2%	7%	0%	3%

Student	11%	5%	1%	7%
Other	2%	1%	0%	2%
Refused to Answer	7%	4%	2%	5%

**Employment Status of International Visitors** - (By country of residence)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Hired Employee	25%	41%	39%	38%	55%	59%	44%
Self-employed	47%	22%	15%	22%	10%	13%	17%
Owner of a Business which Employs Others	5%	9%	8%	6%	6%	6%	13%
Pensioner/Retired	1%	8%	4%	4%	2%	5%	2%
Unemployed	2%	4%	14%	11%	3%	1%	3%
Housewife/Unpaid Family Workers	1%	6%	12%	10%	4%	1%	4%
Student	8%	6%	4%	6%	19%	12%	17%
Other	4%	1%	1%	0%	1%	0%	1%
Refused to Answer	8%	4%	3%	4%	3%	4%	2%

**Percentage of International Visitors with Georgian Ancestry** - Do you have Georgian ancestry? (By purpose of visit)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	11%	30%	9%	15%
No	89%	70%	91%	85%

**Percentage of International Visitors with Georgian Ancestry** - Do you have Georgian ancestry? (By country of residence)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	13%	45%	4%	13%	14%	30%	8%
No	87%	55%	96%	87%	86%	70%	92%



## EXPERIENCE OF VISITING GEORGIA

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	39%	10%	29%	24%
2-3 Times	19%	10%	20%	16%
4-5 Times	8%	7%	9%	9%
6-10 Times	7%	14%	12%	10%
11 Times or More	26%	59%	29%	42%
Average Number of Visits	2 <sup>2</sup>	10	3	3

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	35%	19%	12%	11%	55%	48%	61%
2-3 Times	16%	23%	18%	11%	19%	11%	18%
4-5 Times	9%	12%	11%	6%	5%	6%	8%
6-10 Times	7%	12%	12%	13%	5%	10%	4%
11 Times or More	34%	35%	48%	60%	15%	26%	9%
Average Number of Visits	2	3	4	10	1	1	1

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1st November 2010? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	70%	37%	50%	48%
2-3 Times	19%	23%	25%	22%
4-5 Times	3%	16%	6%	9%

<sup>2</sup> Median Average

6-10 Times	6%	11%	5%	8%
11 Times or More	2%	13%	14%	13%
Average Number of Visits	1	2	2	2

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since 1<sup>st</sup> November 2010? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	50%	69%	43%	28%	74%	72%	74%
2-3 Times	15%	25%	25%	25%	20%	20%	17%
4-5 Times	9%	2%	10%	14%	3%	5%	5%
6-10 Times	11%	2%	8%	12%	1%	2%	1%
11 Times or More	15%	1%	14%	21%	3%	2%	3%
Average Number of Visits	1	1	2	3	1	1	1

## DESCRIPTION OF CURRENT VISIT TO GEORGIA

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
1 Day	24%	28%	19%	35%
2-3 Days	22%	23%	36%	24%
4-5 Days	11%	9%	14%	9%
6-7 Days	7%	7%	9%	6%
8-14 Days	21%	13%	11%	13%
15-20 Days	6%	5%	4%	4%
21-30 Days	5%	7%	2%	4%
31 Days or More	5%	9%	7%	6%
Average Duration of Stay (Days)	4	3	3	3

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
1 Day	50%	12%	32%	43%	11%	8%	3%
2-3 Days	30%	10%	24%	27%	15%	10%	22%
4-5 Days	5%	8%	10%	9%	11%	10%	21%
6-7 Days	3%	8%	6%	4%	11%	10%	16%
8-14 Days	5%	21%	20%	7%	24%	26%	18%
15-20 Days	3%	8%	3%	2%	11%	9%	6%
21-30 Days	2%	10%	3%	4%	10%	11%	3%
31 Days or More	2%	23%	2%	5%	6%	16%	11%
Average Duration of Stay (Days)	1	12	3	2	8	10	6

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Alone	39%	58%	63%	50%

With Friends	25%	16%	12%	21%
With Immediate Family Members (spouse, children under 18)	24%	17%	3%	17%
With Extended Family (relatives, parents)	12%	10%	1%	10%
With Colleagues/ Co-workers	1%	0%	20%	2%
Member of a Tour Group	1%	0%	0.2%	1%
Sports Team Members, Classmates, Peers etc.	0%	0%	1%	0.2%

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Alone	72%	55%	26%	47%	41%	56%	47%
With Friends	20%	11%	25%	21%	28%	19%	27%
With Immediate Family Members (spouse, children under 18)	3%	19%	29%	22%	18%	16%	10%
With Extended Family (relatives, parents)	4%	14%	16%	10%	6%	4%	8%
With Colleagues/Co-workers	1%	1%	4%	1%	5%	5%	6%
Member of a Tour Group	0.2%	0%	1%	0%	1%	2%	2%
Sports Team Members, Classmates, Peers etc.	0%	0%	0.2%	1%	0%	0%	0%
Passenger	0%	0%	0.4%	0.1%	0%	0%	0%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Did not Spend the Night	17%	19%	7%	27%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	40%	8%	67%	27%
Private Home of a Friend or Relative (non-paid accommodation)	17%	48%	12%	23%
Personal Home/Apartment - (non-	8%	23%	5%	10%

paid accommodation)				
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	8%	1%	2%	4%
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	3%	1%	0%	3%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	7%	0%	0%	3%
Rented House/Apartment - tourist rents the entire property	4%	1%	7%	3%
Secondary Residence - summer house	1%	2%	0.2%	1%
Campsite, Caravan site or trailer park (providing some tourist services – shop, information, recreation activities)	1%	0%	1%	1%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	1%	0.2%	0%	0.3%
Health-related Establishments – Sanatoriums, thermal resorts, spas etc.	0.3%	0%	0%	0.3%
Public Means of Transport with Sleeping Accommodation – train, ship, boat	0.3%	0.1%	0%	0.2%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Did not Spend the Night	36%	6%	31%	32%	8%	7%	2%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	34%	12%	21%	23%	35%	39%	56%
Private Home of a Friend or Relative (non-paid accommodation)	11%	46%	22%	34%	21%	13%	9%
Personal Home/Apartment - (non-paid accommodation)	11%	26%	6%	5%	9%	26%	9%
Guesthouse/B&B (and similar	2%	3%	3%	0.4%	23%	20%	10%

establishments providing limited hotel services including daily bed-making and cleaning)							
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	5%	8%	2%	1%	10%	2%	3%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	0.3%	0%	11%	1%	2%	2%	1%
Rented House/Apartment - tourist rents the entire property	1%	1%	2%	4%	6%	5%	15%
Secondary Residence - summer house	0.2%	3%	2%	1%	2%	2%	0%
Campsite, Caravan Site or Trailer Park (providing some tourist services – shop, information, recreation activities)	1%	1%	0%	0.2%	6%	4%	0%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	0.1%	0%	0%	0.1%	2%	3%	1%
Health-related Establishments – Sanatoriums, thermal resorts, spas etc.	0.1%	0%	0.4%	1%	0%	0%	0%
Public Means of Transport with Sleeping Accommodation – train, ship, boat	0.1%	0.2%	0.1%	0%	1%	0%	2%

**Means of Transport Used for Arrival** - Please tell me, with which means of transport did you arrive in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Bus/Minibus	44%	46%	25%	44%
Private Vehicle	33%	26%	19%	31%
Foreign Airline	12%	11%	39%	12%
Rented Vehicle	3%	4%	5%	4%
Georgian Airways/Airzena	3%	6%	8%	4%
Train	4%	4%	4%	3%
Public Vessel – Yacht/Ship/Ferry/Boat	1%	2%	0.1%	1%
Trailer	0%	0%	0%	1%
Walking	0%	1%	0%	1%

**Means of Transport Used for Arrival** - Please tell me via, with which means of transport did you arrive in Georgia? (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Bus/Minibus	68%	25%	34%	45%	10%	18%	26%
Private Vehicle	21%	14%	54%	41%	5%	7%	3%
Foreign Airline	4%	29%	1%	3%	55%	57%	47%
Rented Vehicle	3%	6%	5%	5%	3%	1%	3%
Georgian Airways/Airzena	0%	14%	0%	0%	15%	16%	18%
Train	0%	5%	6%	4%	3%	1%	2%
Public Vessel – Yacht/Ship/Ferry/Boat	0%	6%	0%	0%	6%	0%	1%
Trailer	2%	0%	0%	0%	1%	0%	0%
Walking	0%	0%	1%	2%	1%	0%	0%
Bicycle	0%	0%	0%	0%	1%	0%	1%

## MAIN PURPOSE AND MAJOR INTERESTS IN TRAVELING TO GEORGIA

**Main Purpose of Visit** - Please tell me, what was the main purpose of your current visit to Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other	All Visitors
Leisure/Recreation/Vacation	52%	32%	36%	22%	55%	44%	46%	38.2%
Visiting Relatives	6%	37%	17%	26%	11%	20%	6%	17.3%
Transit on the Way to Another Country	8%	11%	10%	7%	11%	7%	4%	8.5%
Visiting Friends	12%	6%	6%	8%	6%	5%	4%	8.2%
Shopping, Buying Goods with the Aim of Consumption	4%	1%	10%	17%	1%	1%	1%	7.9%
Business or Professional	7%	5%	4%	5%	15%	19%	30%	7.5%
Buying Goods with the Aim of Resale	0.4%	1%	10%	5%	0%	0%	0%	3.7%
Employment	7%	1%	1%	1%	2%	2%	2%	2.9%
Education or Training	1%	0.1%	2%	3%	0.2%	0%	4%	1.7%
Health and Medical Care	0.1%	1%	0%	5%	0%	1%	0.3%	1.5%
Personal Reason	1%	2%	2%	3%	0%	0.2%	0.3%	1.4%
Religion or pilgrimage	2%	0%	0%	0%	0%	0%	0.3%	0.6%
Visit to Second Home	0.1%	1%	1%	0.1%	0%	0.4%	0%	0.5%
Refused to Answer	0.3%	0%	0%	0%	0%	0%	2%	0.2%

**Medical Treatment in Georgia** - You have mentioned that the purpose of your visit to Georgia was for medical or health reasons. Could you please tell me what type of treatment or surgery you have received and where? *(Overall picture)*

	N	Location
Surgical Operation/Procedure	6 respondent	Tbilisi - 5 respondent Kutaisi – 1 respondent
Consultation with Physician	11 respondents	Tbilisi – 8 respondents Lagodekhi – 1 respondent Rustavi - 1 respondent Refused to answer – 1 respondent
Medical Examination (analysis, x-ray, ultrasound, tomography, etc.)	14 respondents	Tbilisi – 11 respondents Marneuli – 1 respondent Lagodekhi – 1 respondent



		Refused to answer - 1 respondent
Recovery/rehabilitation	5 respondents	Borjomi - 2 respondents Kutaisi - 1 respondent Sairme - 1 respondent Ckaltubo - 1 respondent
Dental Treatment	2 respondents	Tbilisi – 1 respondent Rustavi - 1 respondent
Childbirth/Hysterectomy/Gynecological	2 respondents	Tbilisi – 1 respondent Marneuli – 1 respondent

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*International visitors with leisure/recreation/vacation purpose N=1255*)

Yes	10%
No	90%

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*By country of residence for international visitors with leisure/recreation/vacation purpose N=1255*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	9%	6%	11%	13%	15%	10%	9%
No	91%	94%	89%	87%	85%	90%	91%

**Winter Tourism** - Did you come to Georgia to undertake winter activities - whether or not you actually participated in such activities? (*International visitors with leisure / recreation / vacation purpose N=308 – from IV wave only*)

Yes	5%
No	95%

**Winter Tourism** - Did you come to Georgia to undertake winter activities - whether or not you actually participated in such activities? (*By country of residence for international visitors with leisure/recreation/vacation purpose N=308 - from IV wave only*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0.1%	41%	10%	2%	68%	58%	0%
No	100%	59%	91%	98%	32%	42%	100%

**Employment in Georgia** - Concerning your employment, are/were you being paid by a resident Georgian company, the Georgian Government or foreign business registered in Georgia? (*International tourists with employment purpose of visit, N=91*)

Yes	15%
No	71%
Refused to Answer	14%

**MICE Tourism** - Was your primary reason for visiting Georgia on this trip any of the following? (*International tourists with business or professional purpose of visit N=367*)

Corporate/Business Meeting, Seminar, Workshop or Presentation	39%
Conference, Congress, Forum	7%
Incentive Tour Organized by a Business	2%
Exhibition/Trade Fair	1%
I have not participated in any type of event	51%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	1%	30%	34%	23%
Rest and Relaxation	71%	34%	18%	39%
Tasting Georgian Cuisine	50%	40%	44%	38%
Experiencing Georgia's Nature/Scenery/Landscape	58%	24%	28%	34%
Tasting Georgian Wine	34%	27%	31%	24%
Shopping	10%	18%	11%	19%
Visiting Georgia's Historical Sites	31%	14%	17%	18%
Exploring Georgia's Architecture	28%	11%	12%	16%
Experiencing Georgian Hospitality	16%	13%	13%	13%
Experiencing Georgia's Nightlife and Entertainment	12%	8%	3%	7%
Experiencing Georgia's Culture and Folklore	10%	7%	7%	7%
Undertaking Outdoor Adventurous Activities	6%	6%	1%	4%
I Don't Know/Hard to Answer	0%	0%	1%	1%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	21%	16%	24%	31%	16%	13%	15%
Rest and Relaxation	50%	50%	30%	30%	42%	45%	41%
Tasting Georgian Cuisine	23%	59%	45%	34%	50%	53%	51%
Experiencing Georgia's Nature/ Scenery/ Landscape	29%	48%	32%	27%	54%	47%	51%
Tasting Georgian Wine	12%	43%	27%	20%	43%	49%	34%
Shopping	11%	16%	26%	28%	14%	9%	12%
Visiting Georgia's Historical Sites	13%	29%	22%	7%	36%	34%	33%
Exploring Georgia's Architecture	17%	23%	21%	4%	30%	21%	18%
Experiencing Georgian Hospitality	8%	21%	9%	12%	26%	23%	21%
Experiencing Georgia's Nightlife and Entertainment	10%	7%	4%	3%	13%	11%	16%
Experiencing Georgia's Culture and Folklore	6%	7%	6%	2%	20%	17%	18%
Undertaking Outdoor Adventurous Activities	5%	4%	2%	2%	12%	11%	5%
I Don't Know/Hard to Answer	0%	0%	0%	1%	1%	1%	1%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	1%	30%	31%	23%
Experiencing Georgia's Nature/Scenery/ Landscape	57%	19%	26%	31%
Tasting Georgian Cuisine	47%	33%	49%	35%
Tasting Georgian Wine	34%	24%	34%	24%
Visiting Georgia's Historical Sites	29%	9%	13%	15%
Exploring Georgia's	27%	8%	9%	14%

Architecture				
Rest and Relaxation	69%	29%	15%	36%
Undertaking Outdoor Adventurous Activities	5%	2%	2%	3%
Experiencing Georgia's Nightlife and Entertainment	11%	6%	4%	6%
Experiencing Georgia's Culture and Folklore	9%	3%	5%	5%
Experiencing Georgian Hospitality	16%	10%	15%	12%
Shopping	11%	17%	14%	19%
I Don't Know/Hard to Answer	0%	0%	1%	1%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	21%	18%	24%	31%	16%	11%	12%
Rest and Relaxation	44%	48%	29%	27%	41%	42%	40%
Tasting Georgian Cuisine	16%	55%	45%	31%	52%	56%	55%
Experiencing Georgia's Nature/ Scenery/ Landscape	26%	43%	31%	24%	53%	47%	50%
Tasting Georgian Wine	10%	46%	27%	19%	42%	50%	36%
Shopping	11%	17%	24%	28%	17%	11%	16%
Visiting Georgia's Historical Sites	9%	25%	20%	5%	33%	30%	28%
Exploring Georgia's Architecture	15%	18%	19%	3%	27%	21%	18%
Experiencing Georgian Hospitality	6%	22%	9%	11%	28%	25%	22%
Experiencing Georgia's Nightlife and Entertainment	9%	6%	4%	3%	12%	10%	15%
Experiencing Georgia's Culture and Folklore	3%	6%	5%	2%	18%	14%	16%
Undertaking Outdoor Adventurous Activities	2%	2%	2%	1%	13%	8%	4%
I Don't Know/Hard to Answer	1%	0%	0%	1%	1%	2%	1%

**Popular Locations** - Please tell me which locations, sites and/or attractions you visited in Georgia during this visit? (*Overall picture*)

	%	Average Number of Nights
Tbilisi	43%	2
Batumi (Kvariati, Botanical Garden, Gonio Fortress)	38%	1
Marneuli	9%	1
Rustavi	7%	1
Kobuleti	5%	5
Kutaisi (Gelati Monastery, Bagrat's Cathedral, Tskaltubo Caves)	4%	2
Mtskheta (Svetitskhoveli Cathedral, Jvari Monastery, Armazi Fortress, Samtavro, Pompey's Bridge)	3%	0
Lagodekhi (National Park)	3%	0
Ureki	2%	5
Kazbegi (Gergeti Trinity Church)	2%	2
Gori (Stalin's Museum, Gori Fortress)	2%	1
Borjomi (Likani, Mineral waters, Green Monastery, Timotesubani, National Park)	2%	2
Bolnisi (Bolnisi Sioni Church)	2%	3
Kabali	2%	0
Sighnaghi (Bodbe Monastery)	2%	0
Zugdidi (Dadiani's Palace)	2%	2
Mestia & Ushguli	1%	n/a
Gardabani	1%	n/a
Dmanisi (Dmanisi Museum - Archeological Monument)	1%	n/a
Telavi (King Erekle's Museum and Palace, Tsinandali Palace)	1%	n/a
Bakuriani (Kokhtagora, Didveli)	1%	n/a
Gudauri	1%	n/a
Poti	1%	n/a
Tusheti	1%	n/a
Vardzia (Vanis Kvabebi, Sapara, Khertvisi)	1%	n/a
Ananuri (Church and Zhinvali reservoir)	1%	n/a
Tsalka	1%	n/a
Other	5%	n/a
None	5%	n/a

## EXPENDITURE DURING TRAVEL IN GEORGIA

### Expenditure Structure

Number of Total Visitors	2,326,587
Total Expenditure	GEL 1,311,630,300
Expenditure per Visitor	GEL 564

### Expenditures by Purpose of Visit

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Leisure/ Recreation/ Vacation	40.4%	GEL 636,340,057	939,941	GEL 677
Visiting Friends and Relatives	25.1%	GEL 258,116,066	583,973	GEL 442
Business or Professional	7.3%	GEL 171,066,869	169,541	GEL 1,009
Other	27.3%	GEL 246,107,308	633,132	GEL 390

### Expenditures by Country of Residence

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Turkey	28%	GEL 326,373,444	651,444	GEL 501
Russia	9%	GEL 176,518,299	209,393	GEL 843
Armenia	24%	GEL 232,286,496	558,381	GEL 416
Azerbaijan	25%	GEL 193,688,451	581,647	GEL 333
Central and Eastern Europe	5%	GEL 96,320,412	116,329	GEL 828
Other Europe	5%	GEL 173,679,197	116,329	GEL 1,493
Other	4%	GEL 112,764,001	93,064	GEL 1,317

**Expenditure on Services** - Please tell me how much you have spent on the items listed during this visit to Georgia (excluding those services included in the tour package)?

	Total Expenditure	Share of Total Expenditure
Served Food and Drinks	GEL 367,256,484	28%
Accommodation	GEL 249,209,757	19%
Shopping	GEL 249,209,757	19%
Cultural and Entertainment Services	GEL 91,814,121	7%
Domestic Ground Transportation	GEL 104,930,424	8%
Sports and Recreational Services	GEL 52,465,212	4%
Tour Package	GEL 39,348,909	3%
Medical Services	GEL 26,232,606	2%
Domestic Air Transportation	GEL 2,623,261	0.2%
Other Expenditure	GEL 128,539,769	9.8%

## ORGANIZER OF VISITS TO GEORGIA AND INFORMATION SOURCES ABOUT GEORGIA

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Myself	79%	80%	41%	71%
Family Members/Friends	18%	19%	3%	16%
My Business/Company	1%	1%	52%	7%
Foreign Travel Agency/ Tour Operator	1%	0%	1%	1%
Georgian-based Travel Agency / Tour Operator	0%	0%	0%	0.2%
Other	0%	0%	1%	1%
Did not Plan - Transit	0%	0%	0%	4%

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Myself	74%	77%	59%	80%	69%	72%	62%
Family Members/Friends	11%	13%	28%	15%	9%	7%	13%
My Business/Company	10%	4%	5%	3%	12%	15%	17%
Foreign Travel Agency/ Tour Operator	0%	0%	1%	0%	2%	4%	4%
Georgian-based Travel agency / Tour operator	0%	0%	0%	0%	0%	1%	1%
Other	0%	0%	2%	0%	1%	0%	1%
Did not Plan - Transit	5%	6%	6%	1%	6%	1%	2%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I Don't Remember	21%	14%	9%	17%
Previous Visit	40%	65%	53%	57%
Friends & Relatives	36%	30%	20%	29%
Television/Radio	8%	6%	5%	7%

Internet	9%	1%	9%	5%
Organization/Business Partner	0%	1%	26%	3%
Newspaper/Other Magazine	3%	1%	2%	2%
Travel Guidebook	3%	0.2%	2%	2%
Books	1%	2%	1%	2%
Specialized Tourism, Travel or Special Interest Magazine	1%	0%	0.4%	0.4%
Travel Agency / Tour Operator	1%	0%	0%	0.4%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0.2%	0.2%	1%	0.2%
Georgian Embassy/Consulate	0.2%	0%	1%	0.1%
Travel Fairs	0.2%	0%	0%	0.1%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I Don't Remember	22%	14%	9%	22%	7%	17%	7%
Previous Visit	53%	60%	67%	64%	32%	31%	21%
Friends & Relatives	22%	33%	47%	14%	43%	30%	41%
Television/Radio	6%	7%	16%	0%	10%	2%	8%
Internet	3%	5%	0%	1%	25%	21%	26%
Organization/Business Partner	2%	2%	1%	1%	9%	12%	16%
Newspaper/Other Magazine	2%	2%	3%	0%	3%	1%	4%
Travel Guidebook	1%	0%	0%	0%	8%	13%	8%
Books	1%	3%	4%	0%	2%	1%	1%
Specialized Tourism, Travel or Special Interest Magazine	0%	0%	0%	0%	3%	2%	1%
Travel Agency/Tour Operator	0%	0%	0%	0%	0%	4%	4%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0%	0%	0%	0%	0%	1%	3%



Georgian Embassy/Consulate	0%	0%	0%	0%	1%	1%	0%
Travel Fairs	0%	0%	0%	0%	1%	1%	1%

**Websites and Portals Used to Obtain Information on Georgia** - Please tell me from which travel-related websites you obtained information about Georgia? (*Visitors who got information from internet – N=264*)

I cannot recall any specific website	38%	www.S7.ru	3%
www.lonelyplanet.com	23%	www.worldtravelguide.com	2%
www.georgia.travel	18%	www.museum.ge	1%
www.wikitravel.com	13%	www.couchsurfing.com	1%
www.tripadvisor.com	8%	www.georgia.itdc.ge	1%
www.kaukaz.pl	7%	www.caucasus.com	1%
www.info-tbilisi.ge	6%	www.svanetitrekking.ge	1.3%
www.map.ge	6%	www.gudauri.com	1.2%
www.expedia.com	3%	www.e-info.ge	1%
www.lametayel.net	4%	Other	6%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	3%	2.5%	8%	3%
No	97%	97.5%	92%	97%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	1%	5%	0%	0%	15%	17%	11%
No	99%	95%	100%	100%	85%	83%	89%

**Train Tickets** - Please tell me whether your train tickets were purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0.3%	0%	0.5%	0.2%
No	99.7%	100%	99.5%	99.8%

**Train Tickets** - Please tell me whether your train tickets were purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0.3%	0.3%	0%	1%	1%	1%
No	100%	99.7%	99.7%	100%	99%	100%	99%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	1.5%	0.1%	2%	1%
No	98.5%	99.9%	98%	99%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0.3%	0%	0.6%	0.3%	4.5%	4%	3%
No	99.7%	100%	99.4%	99.7%	95.5%	96%	97%

**Tour Package** - Please tell me whether your tour package was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0.1%	0%	0.3%	0.1%
No	99.9%	100%	99.7%	99.9%

**Tour Package** - Please tell me whether your tour package was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	0.2%	1%	0.3%
No	100%	100%	100%	100%	99.8%	99%	99.7%

## PROBLEMS ENCOUNTERED IN GEORGIA

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I have not Encountered any Problems	80%	90%	74%	82%
Transportation (roads/traffic)	5%	3%	11%	5%
Public Toilets	5%	4%	4%	5%
Foreign Language Capacity	4%	2%	8%	4%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	4%	1%	5%	3%
Poor Service in Restaurants/Food Spots	2%	1%	2%	2%
Navigation/Road Signs/Interpretation	2%	1%	2%	2%
Untidy/Dirty Streets, Parks, Squares	2%	1%	2%	1%
Information on Transport Timetables and Destinations	2%	1%	1%	1%
Poor Service in Hotels/Guesthouses	1%	1%	2%	1%
Lack of Tourist Maps	2%	0%	1%	1%
Lack of Tourism Informational Centers/Points	1%	0%	2%	1%
Lack of Foreign Language Menus	1%	0%	2%	1%
Border Crossing	1%	0%	0%	1%
Sanitary Conditions in Hotels and Restaurants	1%	0%	1%	1%
Attitude of Police	0%	0%	0%	1%
Other	4%	2%	5%	4%

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I have not Encountered any Problems	82%	79%	85%	86%	75%	73%	57%
Transportation (roads/traffic)	8%	6%	2%	4%	11%	8%	8%
Public Toilets	8%	6%	2%	2%	9%	10%	14%
Foreign Language Capacity	4%	1%	0.4%	2%	7%	15%	24%
Expensive Hotels / Expensive Restaurants/Expensive Food Products / High Tariffs in General	5%	1%	2%	3%	3%	4%	2%
Poor Service in Restaurants/Food Spots	1%	3%	2%	1%	3%	1%	5%
Navigation/Road Signs/Interpretation	1%	0%	2%	1%	3%	3%	6%
Untidy/Dirty Streets, Parks, Squares	1%	2%	1%	1%	5%	4%	3%
Information on Transport Timetables and Destinations	2%	2%	0%	1%	4%	3%	4%
Poor Service in Hotels/Guesthouses	1%	0%	1%	1%	1%	2%	1%
Lack of Tourist Maps	0.3%	2%	0%	0.3%	2%	4%	5%
Lack of Tourism Informational Centers/ Points	0.3%	1%	0.2%	0.4%	2%	4%	2%
Lack of Foreign Language Menus	0.4%	1%	0%	0%	2%	2%	5%
Border Crossing	0.3%	1%	0%	1%	1%	1%	1%
Sanitary Conditions in Hotels and Restaurants	0.3%	1%	0%	1%	1%	2%	1%
Attitude of Police	1%	0%	1%	0%	0%	1%	0.3%
Lack of Shopping Centers	0.1%	0.4%	0.2%	0.1%	1%	1%	2%
Cuisine	0.1%	0.1%	0%	1%	1%	0%	1%
Lack of Modern Restaurants and Cafes	0.3%	1%	0%	0%	1%	1%	1%
Unfriendly Attitude of People	1%	0%	0.2%	0%	0%	0.2%	1%
Other	1%	4%	4%	1%	3%	6%	3%

## SATISFACTION FROM THE TRIP TO GEORGIA AND PLANS FOR A FUTURE VISIT

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Very Satisfied	69%	74%	66%	67%
Satisfied	28%	24%	32%	30%
Dissatisfied	1%	1%	1%	2%
I Don't Know/Hard to Answer	2%	2%	1%	2%
Average Satisfaction	3.7	3.7	3.7	3.7

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Very Satisfied	68%	74%	54%	73%	71%	75%	53%
Satisfied	26%	21%	43%	25%	25%	21%	44%
Dissatisfied	2%	3%	1%	1%	3%	2%	2%
I Don't Know/Hard to Answer	4%	1%	2%	0%	2%	3%	1%
Average Satisfaction	3.7	3.7	3.6	3.7	3.7	3.8	3.7

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Georgian Wine	3.7	3.8	3.8	3.8
Environment/Landscape of Georgia	3.7	3.8	3.7	3.8
Historical and Cultural Heritage	3.7	3.8	3.8	3.7

Georgian Hospitality	3.7	3.8	3.8	3.7
Georgian Cuisine	3.7	3.8	3.7	3.7
Restaurant Facilities and Service	3.5	3.6	3.6	3.5
Hotel Facilities and Service	3.4	3.3	3.5	3.4
Guesthouse/B&B Facilities and Services	3.3	3.5	3.7	3.4
Tourism Informational Centre Service	3.3	3.5	3.4	3.3
Value for Money	3.4	3.4	3.3	3.3
Transport Services/ Infrastructure	3.3	3.4	3.2	3.3
Travel Agency / Tour Operator Service	3.3	3.4	3.3	3.3

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? **USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISATISFIED” AND “4” VERY SATISFIED (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Georgian Wine	3.7	3.9	3.6	3.9	3.8	3.7	3.8
Environment/Landscape of Georgia	3.7	3.8	3.7	3.8	3.8	3.8	3.7
Historical and Cultural heritage	3.7	3.9	3.6	3.8	3.8	3.8	3.8
Georgian Hospitality	3.6	3.8	3.6	3.8	3.8	3.9	3.6
Georgian Cuisine	3.6	3.9	3.6	3.8	3.7	3.8	3.6
Restaurant Facilities and Service	3.5	3.5	3.4	3.5	3.5	3.5	3.3
Hotel Facilities and Service	3.4	3.5	3.3	3.3	3.5	3.5	3.3
Guesthouse / B&B Facilities and Services	3.3	3.3	3.5	3.7	3.4	3.4	3.4
Tourism Informational Centre Service	3.3	3.5	3.6	3.6	3.2	3.3	3.3
Value for Money	3.3	3.2	3.1	3.5	3.3	3.3	3.3
Transport Services/ Infrastructure	3.1	3.3	3.5	3.4	3.1	3.1	3.1
Travel Agency / Tour Operator Service	3.3	3.7	3.5	3.6	3.0	3.3	2.9

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	87%	92%	90%	88%
Maybe	12%	8%	10%	11%
No	1%	0.4%	0.3%	1%

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	85%	90%	91%	94%	79%	81%	81%
Maybe	15%	10%	9%	6%	19%	17%	18%
No	1%	0%	1%	0.3%	2%	2%	1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	88%	85%	82%	82%
Maybe	11%	15%	17%	17%
No	1%	0.4%	1%	1%
Don't Know	0%	0%	1%	0.1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	79%	84%	76%	88%	87%	87%	82%
Maybe	20%	15%	23%	12%	10%	11%	16%
No	1%	1%	1%	1%	4%	2%	2%



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# INTERNATIONAL VISITOR SURVEY – WAVE II+III+IV+V REPORT

FINAL

Monday, September 17, 2012

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# **INTERNATIONAL VISITOR SURVEY – WAVE II+III+IV+V REPORT**

FINAL

USAID ECONOMIC PROSPERITY INITIATIVE (EPI)

CONTRACT NUMBER: AID-114-C-10-00004

DELOITTE CONSULTING LLP

USAID/CAUCASUS

MONDAY, SEPTEMBER 17, 2012

## **DISCLAIMER:**

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

# DATA

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# ABSTRACT

ACT Research prepared this Second, Third, Fourth and Fifth Wave International Visitor Survey Report for Deloitte Consulting LLP in the framework of USAID-funded Economic Prosperity Initiative (EPI). The report represents the period July 2011 to June 2012.

The research was undertaken to create an annual set<sup>1</sup> of visitor surveys based on statistically valid templates and methodologies. The data produced is necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU - Eurostat) and United Nations World Tourism Organization (UNWTO) obligations.

Face to face interviews were conducted at a variety of border-crossing points (road, airport, port and railway) with 4,196 international visitors leaving Georgia between August 26 and September 5, 2011, November 30 and December 19, 2011, February 16 and March 1, 2012 and May 18 and 30, 2012.

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<sup>1</sup> Surveys were undertaken quarterly

# ABBREVIATIONS/DEFINITIONS

ACT	ACT Research (Market Research & Consulting Company)
EPI	Economic Prosperity Initiative
EU	European Union
GDP	Gross Domestic Product
GEL	Georgian Currency - the Lari
GNTA	Georgian National Tourism Administration
MICE	Meetings, Incentives, Conferences & Exhibitions
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
Formal information sources	Information acquired from internet, media, tourist agencies etc.
Informal information sources	Information acquired from relatives, friends, and colleagues - word of mouth
Holiday-makers	Leisure, recreation or vacation tourists.
Neighboring countries	Turkey, Russia, Azerbaijan and Armenia
Tourist	A visitor who stays at least one night in a collective or private accommodation in the place/country visited.
Visitor	Any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.
Word of Mouth	Information received from friends, relatives, colleagues or other persons

# CONTENTS

- I. EXECUTIVE SUMMARY ..... 1
- II. APPENDICES..... 3
  - A. BACKGROUND ..... 4
  - B. METHODOLOGY ..... 5
  - C. FINDINGS..... 7

# I. EXECUTIVE SUMMARY

The International Visitor Survey was conducted to examine the behavior, satisfaction, expenditure and profile of international visitors to Georgia. This document reports on the cumulative results of the second, third and fourth and fifth surveys in a series of five quarterly international visitor surveys.

The survey results indicated that the socio-economic profile of the typical international visitor is a 25-34 year old (28%), employed (37%) man (73%). Most international visitors are residents of Georgia's neighboring countries; Turkey (30%), Azerbaijan (25%), Armenia (22%), and Russia (9%). Only 14% of international tourists surveyed were of Georgian descent, and predominantly came from Russia (41%) and 'Other Europe' (26%).

Between July 2011 and June 2012, 37% of international visitors came to Georgia for the first time. 54% of holiday-makers came to Georgia for the first time, compared to 37% of business travelers and 17% of those visiting friends and relatives.

The survey results indicated that the average international visitor traveled to Georgia three times, although this number varied according to the purpose of visit. For example, visitors traveling to see friends and relatives made an average of nine trips, business travelers made two trips on average, while holiday-makers travelled to Georgia only once on average.

Georgia hosted residents of neighboring countries more often than visitors from other countries. For example, Azeri visitors made ten trips on average; Armenians made an average of four trips, Russian visitors travelled three times, Turks and travelers from 'Other' countries came only once.

Based upon the survey data, most visitors (70%) organized their own visits, while only 1.2% used a travel agency or tour operator. In general, the use of a travel agency or tour operator to organize a visit to Georgia was quite low among all tourists regardless of country of residence, although 8% of visitors from 'Other Europe' and 5% from 'Other' countries worked with a travel agency.

In order to plan their travel, visitors relied on a variety of information sources, such as 'word of mouth'. For instance, 31% of international visitors obtained information via 'word of mouth' from their friends and relatives, and 53% relied on information gathered from previous visits.

In addition to information gained via 'word of mouth', visitors from Central and Eastern Europe (27%), 'Other' countries (27%) and 'Other Europe' (22%) relied on the Internet for information about Georgia. The most popular Internet websites among international visitors were [www.lonelyplanet.com](http://www.lonelyplanet.com), [www.georgia.travel](http://www.georgia.travel) and [www.wikitavel.com](http://www.wikitavel.com).

However, the Internet was not often utilized for booking travel arrangements; only 3% of international visitors purchased air tickets online, and 1% booked accommodation online.

Half of all international visitors came to Georgia alone. Those traveling on business (60%) or visiting friends and relatives (56%) also tended to travel alone, while holiday-makers usually traveled with companions (60%).

Turkish visitors tended to travel alone (70%), as did Russians (55%) and those from 'Other Europe' (52%).

The majority of international visitors (81%) used land transportation, such as minibus (47%), a private vehicle (29%), rented vehicle (4%) and trailer (1%) to arrive in Georgia. However,



15% of international visitors arrived by plane and a small number arrived by train (3%) or a public vessel (1%).

The survey data demonstrated that 32% of international visitors did not pay for accommodation but stayed with relatives or friends (22%), in their personal home (9%) or secondary residence (1%).

However, 27% of international visitors spent at least one night in a hotel; this type of accommodation most popular among those from 'Other' countries (56%) and 'Other Europe' (43%). Also, 69% of visitors travelling on business and 39% of holiday-makers stayed in hotels.

The survey data indicated that 40% of visitors traveled to Georgia for leisure/recreation/vacation, while 25% arrived to visit friends and relatives. Only 7% of visitors were engaged in business and 8% came to Georgia to shop for themselves.

International visitors traveling in Georgia were interested in the following experiences: rest and relaxation (36%), tasting Georgian cuisine (35%), experiencing Georgian nature and scenery (35%), and tasting Georgian wine (23%).

Tbilisi was the most popular location for international visitors and attracted 42% of travelers while Batumi was visited by 39% of visitors. In addition, other popular destinations for international visitors included Marneuli (8%), Rustavi (7%) and Kobuleti (5%).

On average, visitors spent five nights in Kobuleti and Ureki, three nights in Bolnisi, two nights in Tbilisi, and Kazbegi, and one night in Batumi, Marneuli, Gori, Kutaisi and Borjomi.

Between July 2011 and June 2012, a total of 3,457,823 international visitors came to Georgia and spent GEL 1,832,646,190 with an average expenditure per visitor of GEL 530. International visitors traveling for business had the highest average expenditure of GEL 991 per capita. Those visiting friends and relatives spent an average of GEL 407, while holiday-makers spent GEL 634 per person on average. The highest expenditures were from visitors of 'Other Europe' (GEL 1,489) and from 'Other' countries (GEL 1,319) and the lowest from Azeri visitors – GEL 318 on average.

Georgia's international visitors generated revenues in the following sectors: a) restaurants, food and beverage – GEL 513,140,933; b) hotels and accommodation - GEL 366,529,238; c) shopping – GEL 366,528,238; and d) domestic ground transportation - GEL 146,411,695.

The visitors surveyed, were asked to rate their experiences on a '4 Point Scale' where '1' indicates extreme dissatisfaction and '4' stands for great satisfaction. Visitors rated Georgia well overall (score of 3.7), although the least satisfied were visitors from Armenia, Turkey and 'Other' countries (3.6 each). The following attractions received the best ratings: Georgian wine (3.7), Georgian environment/ landscape (3.7), historical and cultural heritage (3.7), Georgian hospitality (3.7) and Georgian cuisine (3.7).

Visitors surveyed, gave the lowest ratings for infrastructure and transport services, travel agency and tour operator services, value for money, and services provided by information centers. Problems during the visit in Georgia were related to transportation (5%), public toilets (4%), foreign language capacity (3%) and high prices in general (3%).

The vast majority (87%) of visitors were interested in traveling to Georgia again. Residents of Central and Eastern Europe and 'Other' Europe (79% each) are slightly less likely than other groups to be interested in returning.

The majority of visitors (81%) would recommend Georgia to friends and relatives. Residents of Turkey and Armenia (76% each) were slightly less likely to recommend the country.

## **II. APPENDICES**

- A. BACKGROUND**
- B. METHODOLOGY**
- C. FINDINGS**

## A. BACKGROUND

Tourism is a priority sector for EPI, and wine tourism and MICE tourism are priority value chains. A solid understanding of tourist behavior has been a significant factor in the success of many countries that have built tourism into a strong Gross Domestic Product (GDP) contributor. Such data is fundamental to sound policy formulation. However, simply measuring the contribution of tourism to the national economy is not enough. EPI's value chain assessment process and other research have pinpointed several important issues:

- Until recently, there has been limited availability of useful tourist data;
- The Georgian National Tourism Administration (GNTA) has undertaken tourism surveys in the past that have been neither comprehensive nor consistent in the methodology used.
- Georgia's tourism sector directly comprises suppliers of tourism products and services, tourist attractions, government entities, educational institutions and private sector associations. To build a complete picture of the tourism industry and define specific policy initiatives, it is critical to obtain and analyze data from many of these individuals and organizations. It is equally important for all of these value chain actors to benefit from a transparent tourism information system that can underpin broad input to policy making and enable better planning and implementation in all segments of society that are involved in the success of Georgian tourism.

GNTA and EPI are, in partnership, undertaking an annual visitor survey based on statistically valid methodologies that would produce the data necessary to underpin a best-practice tourism industry in Georgia and enable Georgia's compliance with European Union (EU) and United Nations World Tourism Organization (UNWTO) obligations. The survey data collected will also be used for EPI Performance Monitoring purposes.

## B. METHODOLOGY

The main aim of the survey is to investigate the behavior, satisfaction, expenditure and profile of international visitors to Georgia.

The survey's objectives are to identify/gather data on the Socio-economic profile of international visitors; Repeat visitation; Purpose of visit; Locations visited by visitors; Main interests of visitors; Accommodations utilized; Transportation utilized; Visitor expenditure; Information sources utilized; Satisfaction of facilities, attractions and services; Problems encountered; and Intentions to return.

### RESEARCH METHODOLOGY

In order to study the above mentioned goals and objectives quantitative and qualitative research methodologies were used.

As a first stage of the project, the ACT project team familiarized themselves with background reading related to tourism data collection methodologies, classifications and categories. During this stage, the ACT project team also conducted interviews with regional tourist industry experts.

The ACT project team conducted qualitative data collection by interviewing international visitors who were leaving Georgia. Face to face interviews were conducted at each type of border checkpoint (land, airport, railway and port). Overall, 4,196 visitors were interviewed between August 26 and September 5, 2011 (Wave II), November 30 and December 19, 2011 (Wave III), February 16 and March 1, 2012 (Wave IV) and May 18 and 30, 2012 (Wave V). The typical interview length was between 10-12 minutes.

The ACT project team applied a stratified systematic sample method with the border checkpoint type taken as stratification variable. The final sampling unit was a resident of foreign country aged 15 years and over. The figure below presents the distribution of the interviews according to border checkpoint types:

Type	Border	Sample Size
Airport	Tbilisi Airport	1056
Airport	Batumi Airport	188
Port	Batumi Port	180
Port	Poti Port	2
Railway	Gardabani Railway	81
Railway	Sadakhlo Railway	100
Land	Sadakhlo	588
Land	Sarpi	1224
Land	Tsodna	200
Land	Red Bridge	577

Based on the methodology created with expert input, the survey data for Wave II, Wave III Wave IV and Wave IV was generalized for the period July 2011 to June 2012. The overall results of the survey, as well as the results according to purpose of visit and country of residence are provided.

Data according to purpose of visit – the survey results according to purpose of visit are analyzed separately for holiday/leisure/recreation visitors, those visiting friends/relatives and professional/business visits. Analysis for other purposes of visit is not listed separately due to the small sample size.

Data according to country of residence – survey results according to visitor citizenship are analyzed separately for neighboring countries – Turkey, Russia, Azerbaijan and Armenia. Other countries are grouped in two 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” are grouped the following countries: 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 grouped in any of the abovementioned country groups, due to the small sample, were consequently grouped as ‘Other’ Counties. These countries include: Afghanistan, Argentina, Australia, Bangladesh, Brazil, Canada, China, Egypt, Ethiopia, Ghana, Guyana, India, Indonesia, Iran, Iraq, Japan, Lebanon, Malaysia, Mexico, Nepal, New Zealand, Nigeria, Pakistan, Philippines, Qatar, South Korea, Saudi Arabia, South Africa, Sri Lanka, Syria, Taiwan, Thailand, United Arab Emirates, and United States.

## C. FINDINGS

### SOCIO-ECONOMIC PROFILE OF INTERNATIONAL VISITORS TO GEORGIA

**Country of Residence of International Visitors** - Please tell me, in which country do you currently live? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	43%	20%	25%	30%
Azerbaijan	14%	35%	14%	25%
Armenia	19%	22%	17%	22%
Russia	7%	16%	7%	9%
Ukraine	2%	1%	5%	2%
Iran	2%	0.2%	6%	2%
Germany	1%	1%	2%	1%
Poland	2%	0.1%	1%	1%
Israel	1%	0.2%	1%	1%
Italy	1%	1%	1%	1%
United States	1%	1%	3%	1%
Greece	1%	1%	0.3%	0.4%
United Kingdom	0.3%	1%	2%	0.4%
Czech Republic	1%	0%	1%	0.4%
Belarus	0.2%	1%	0.1%	0.3%
Austria	0.4%	0.1%	1%	0.3%
France	0.2%	0.2%	2%	0.3%
Kazakhstan	0.3%	0.2%	0.3%	0.2%
India	0%	0.1%	1%	0.2%
Spain	0.1%	0%	1%	0.2%
Switzerland	0.1%	0%	1%	0.2%
China	0.1%	0%	2%	0.2%
Japan	0.2%	0%	0.2%	0.1%
Other	3%	1%	8%	2%

**Citizenship of International Visitors** - What is your country of citizenship? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Turkey	43%	16%	24%	29%
Azerbaijan	12%	33%	14%	23%
Armenia	19%	22%	17%	22%
Russia	8%	13%	7%	9%
Georgia	2%	12%	1%	4%
Ukraine	2%	1%	4%	2%
Iran	2%	0.4%	7%	2%
Poland	2%	0.1%	2%	1%
United States	1%	0.4%	3%	1%
Germany	1%	0.2%	2%	1%
Israel	1%	0.2%	1%	1%
Belarus	0.4%	0.3%	0.4%	0.3%
Czech Republic	1%	0%	1%	0.4%
Austria	0.3%	0.1%	1%	0.2%
France	0.2%	0.2%	1%	0.3%
Greece	0.3%	0.2%	1%	0.2%
Italy	0.2%	0.1%	1%	0.2%
Kazakhstan	0.3%	0.2%	0.4%	0.3%
United Kingdom	0.4%	0.2%	2%	0.3%
India	0%	0.1%	1%	0.2%
Switzerland	0.1%	0%	0.4%	0.1%
China	0.1%	0%	2%	0.2%
Japan	0.2%	0%	0.2%	0.1%
Other	3%	1%	8%	2%

**International Visitors - Age Groups** - Could you please tell me your age? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
15 - 17	1%	1%	0%	1%
18 - 24	17%	10%	5%	13%
25 - 34	31%	25%	33%	28%
35 - 44	26%	23%	30%	26%
45 - 54	17%	23%	24%	21%
55 - 64	7%	14%	8%	9%
65 and Above	1%	4%	1%	2%

**International Visitors - Age Groups** - Could you please tell me your age? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
15 - 17	0%	2%	1%	1%	1%	0%	1%
18 - 24	13%	12%	10%	13%	24%	10%	15%
25 - 34	29%	24%	28%	27%	34%	26%	36%
35 - 44	28%	24%	26%	27%	19%	23%	26%
45 - 54	20%	22%	23%	21%	16%	21%	16%
55 - 64	8%	13%	11%	9%	4%	13%	5%
65 and Above	2%	4%	2%	2%	2%	6%	1%

**International Visitors – Gender** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Male	70%	66%	84%	73%
Female	30%	34%	16%	27%

**International Visitors - Gender** - *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Male	86%	59%	64%	75%	58%	55%	74%
Female	14%	41%	36%	25%	42%	45%	26%

**Employment Status of International Visitors** - *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Hired Employee	39%	33%	51%	37%
Self-employed	21%	22%	23%	24%
Unemployed	4%	11%	1%	8%
Owner of a Business which Employs Others	5%	6%	22%	7%
Housewife/Unpaid Family Workers	6%	11%	0.2%	7%
Student	11%	5%	0.4%	7%
Pensioner/Retired	3%	7%	0.1%	4%
Other	2%	2%	0%	2%
Refused to Answer	9%	4%	2%	5%



**Employment Status of International Visitors - (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Hired Employee	27%	40%	40%	37%	55%	59%	46%
Self-employed	41%	19%	15%	20%	9%	13%	16%
Unemployed	2%	6%	14%	12%	3%	1%	2%
Owner of a Business which Employs Others	4%	11%	9%	8%	6%	6%	14%
Housewife/Unpaid Family Workers	2%	6%	12%	10%	3%	1%	3%
Student	8%	6%	4%	6%	19%	12%	14%
Pensioner/Retired	3%	8%	4%	4%	2%	6%	2%
Other	4%	2%	1%	0%	1%	0.2%	1%
Refused to Answer	10%	4%	3%	4%	3%	3%	2%

**Percentage of International Visitors with Georgian Ancestry - Do you have Georgian ancestry? (By purpose of visit)**

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	10%	28%	7%	14%
No	90%	72%	93%	86%

**Percentage of International Visitors with Georgian Ancestry - Do you have Georgian ancestry? (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	12%	41%	5%	12%	14%	26%	7%
No	88%	59%	96%	88%	86%	74%	93%

## EXPERIENCE OF VISITING GEORGIA

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	54%	17%	37%	37%
2-3 Times	23%	18%	24%	21%
4-5 Times	9%	9%	12%	10%
6-10 Times	7%	19%	10%	11%
11 Times or More	7%	38%	18%	22%
Average Number of Visits	1	9	2	3

**Experience of Visiting Georgia** - Please tell me, including this visit, how many times have you visited Georgia in total? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	50%	27%	21%	18%	62%	65%	69%
2-3 Times	18%	32%	29%	15%	22%	14%	20%
4-5 Times	8%	13%	14%	9%	5%	8%	5%
6-10 Times	8%	14%	9%	18%	6%	10%	3%
11 Times or More	16%	14%	28%	41%	5%	4%	2%
Average Number of Visits	1	3	4	10	1	1	1

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since (date given for last 6 months)? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
This is My First Visit	72%	37%	52%	50%
2-3 Times	18%	24%	24%	21%
4-5 Times	3%	15%	7%	9%
6-10 Times	5%	11%	4%	8%
11 Times or More	2%	12%	13%	11%
Average Number of Visits	1	2	1	1

**Experience of Visiting Georgia within Last Six Months** - Including this visit, how many times have you visited Georgia since (date given for last 6 months)? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
This is My First Visit	57%	70%	43%	28%	78%	74%	78%
2-3 Times	16%	24%	26%	24%	17%	19%	16%
4-5 Times	8%	2%	11%	14%	2%	4%	4%
6-10 Times	9%	3%	8%	14%	1%	2%	1%
11 Times or More	11%	1%	13%	20%	2%	1%	2%
Average Number of Visits	1	1	2	3	1	1	1

## DESCRIPTION OF CURRENT VISIT TO GEORGIA

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
1 Day	27%	27%	17%	36%
2-3 Days	22%	24%	32%	24%
4-5 Days	11%	9%	19%	9%
6-7 Days	7%	7%	10%	6%
8-14 Days	19%	13%	10%	12%
15-20 Days	5%	5%	3%	4%
21-30 Days	5%	6%	2%	4%
31 Days or More	4%	8%	6%	5%
Average Duration of Stay (Days)	4	3	4	2

**Duration of Stay in Georgia** - Please tell me, how many days have you spent in Georgia during this (last) visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
1 Day	51%	15%	33%	43%	10%	7%	3%
2-3 Days	30%	9%	22%	26%	15%	9%	22%
4-5 Days	5%	9%	11%	9%	14%	11%	21%
6-7 Days	3%	7%	6%	5%	11%	11%	18%
8-14 Days	5%	20%	20%	7%	23%	29%	16%
15-20 Days	2%	8%	3%	3%	10%	9%	5%
21-30 Days	2%	9%	2%	4%	9%	10%	3%
31 Days or More	2%	23%	3%	4%	7%	15%	11%
Average Duration of Stay (Days)	1	11	3	2	7	10	6

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Alone	40%	56%	60%	49%
With Friends	26%	17%	13%	22%
With Immediate Family Members (spouse,	22%	16%	4%	16%

children under 18)				
With Extended Family (relatives, parents)	11%	11%	1%	10%
With Colleagues/ Co-workers	1%	0%	21%	2%
Member of a Tour Group	2%	0%	1%	1%
Sports Team Members, Classmates, Peers etc.	0.1%	0%	2%	0.2%
Passenger	0%	0%	0%	0.2%

**Trip Companions** - Please tell me, with whom you have been traveling during this trip? (By country of residence)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Alone	70%	55%	26%	46%	39%	52%	45%
With Friends	21%	11%	24%	22%	29%	20%	27%
With Immediate Family Members (spouse, children under 18)	3%	19%	28%	21%	20%	16%	12%
With Extended Family (relatives, parents)	4%	14%	17%	11%	6%	3%	8%
With Colleagues/Co-workers	1%	2%	4%	1%	5%	5%	6%
Member of a Tour Group	2%	0%	1%	0%	1%	3%	2%
Sports Team Members, Classmates, Peers etc.	0%	0%	0.4%	0.4%	0%	0.2%	0%
Passenger	0%	0%	1%	0.1%	0%	0%	0%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? (By purpose of visit)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Did not Spend the Night	22%	20%	7%	29%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	39%	9%	69%	27%
Private Home of a Friend or Relative (non-paid accommodation)	15%	48%	12%	22%
Personal Home/Apartment - (non-paid accommodation)	7%	21%	5%	9%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making	7%	1%	3%	4%

and cleaning)				
Other Accommodation (This group refers to places where people have slept that are not intended for habitation) – railway, airport etc.	2%	1%	0.3%	3%
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	6%	0.2%	0.4%	3%
Rented House/Apartment - tourist rents the entire property	4%	1%	7%	3%
Secondary Residence - summer house	1%	2%	0.1%	1%
Campsite, Caravan site or trailer park (providing some tourist services – shop, information, recreation activities)	1%	0%	1%	1%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	1%	0.1%	0%	0.3%
Health-related Establishments – Sanatoriums, thermal resorts, spas etc.	0.2%	0%	0%	0.2%
Public Means of Transport with Sleeping Accommodation – train, ship, boat	0.3%	0.1%	0%	0.2%
Other	0%	0%	1%	0%

**Accommodation Facilities Used** - Please tell me, which of the following accommodation types did you stay in during this visit? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Did not Spend the Night	40%	10%	32%	34%	8%	6%	2%
Hotel (and similar establishments providing hotel services including more than daily bed-making and cleaning of the room)	34%	13%	21%	21%	36%	43%	56%
Private Home of a Friend or Relative (non-paid accommodation)	9%	45%	23%	34%	20%	12%	8%
Personal Home/Apartment - (non-paid accommodation)	10%	24%	5%	5%	8%	24%	9%
Guesthouse/B&B (and similar establishments providing limited hotel services including daily bed-making and cleaning)	1%	3%	3%	1%	21%	22%	11%
Other Accommodation (This	4%	6%	2%	1%	8%	1%	2%

group refers to places where people have slept that are not intended for habitation) – railway, airport etc.							
Rented Rooms in Family Houses - tourist stays with the family that usually lives in the home and pays rent	0.3%	0%	11%	1%	2%	2%	1%
Rented House/Apartment - tourist rents the entire property	0.3%	0.1%	11%	1%	2%	2%	1%
Secondary Residence - summer house	0.2%	2%	2%	1%	2%	2%	0%
Campsite, Caravan Site or Trailer Park (providing some tourist services – shop, information, recreation activities)	1%	1%	0%	0.2%	8%	4%	0%
Youth hostel, Group Accommodation, Hall of Residence, School Dormitory	0.1%	0%	0%	0.3%	2%	3%	1%
Health-related Establishments – Sanatoriums, thermal resorts, spas etc.	0.1%	0%	0.4%	1%	0%	0%	0%
Public Means of Transport with Sleeping Accommodation – train, ship, boat	0.1%	0.3%	0.2%	0%	1%	0%	1%
Other	0.1%	0%	0%	0.1%	1%	0.2%	1%

**Means of Transport Used for Arrival** - Please tell me, with which means of transport did you arrive in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Bus/Minibus	48%	48%	25%	47%
Private Vehicle	29%	26%	18%	29%
Rented Vehicle	3%	4%	5%	4%
Train	3%	3%	4%	3%
Trailer	0%	0%	0%	1%
Public Vessel – Yacht/Ship/Ferry/Boat	1%	2%	0.1%	1%
Foreign Airline	12%	10%	41%	12%
Georgian Airways/ Airzena	3%	6%	8%	3%
Walking	0%	1%	0%	1%
Other	0.3%	0.4%	0%	0.4%

**Means of Transport Used for Arrival** - Please tell me via, with which means of transport did you arrive in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Bus/Minibus	74%	27%	35%	46%	10%	26%	47%
Private Vehicle	17%	14%	52%	40%	8%	4%	29%
Rented Vehicle	3%	6%	5%	6%	2%	2%	4%
Train	0.3%	4%	6%	4%	2%	1%	3%
Trailer	2%	0%	0%	0%	1%	0%	1%
Public Vessel – Yacht/Ship/Ferry/Boat	0.2%	6%	0.3%	0%	6%	0.5%	1%
Foreign Airline	4%	29%	0.4%	2%	55%	50%	12%
Georgian Airways/Airzena	1%	13%	0.3%	0%	14%	17%	3%
Walking	0%	0%	0.4%	1%	1%	0%	1%
Other	0.2%	1%	0.3%	0.1%	1%	0%	0.3%



## MAIN PURPOSE AND MAJOR INTERESTS IN TRAVELING TO GEORGIA

**Main Purpose of Visit** - Please tell me, what was the main purpose of your current visit to Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other	All Visitors
Leisure/Recreation/Vacation	57%	31%	35%	22%	56%	49%	47%	40%
Visiting Relatives	5%	36%	18%	28%	9%	17%	5%	17%
Transit on the Way to Another Country	7%	14%	11%	6%	11%	6%	6%	8%
Visiting Friends	11%	6%	7%	8%	6%	4%	4%	8%
Shopping, Buying Goods with the Aim of Consumption	5%	2%	9%	16%	0.4%	1%	1%	8%
Business or Professional	6%	5%	6%	4%	15%	20%	30%	7%
Buying Goods with the Aim of Resale	0.4%	1%	9%	4%	0%	0%	0%	3%
Employment	5%	1%	1%	1%	2%	2%	2%	2%
Education or Training	0.3%	0.1%	2%	3%	0.4%	0.4%	4%	2%
Health and Medical Care	0.1%	1%	0%	5%	0%	1%	0.2%	1%
Personal Reason	0.4%	2%	2%	3%	0%	0.2%	0.3%	2%
Religion or Pilgrimage	1%	0%	0%	0%	0%	0%	0.3%	0.4%
Visit to Second Home	0.1%	1%	1%	0.3%	0%	0.4%	0%	1%
Refused to Answer	1%	0%	0%	0%	0%	0%	2%	0.4%

**Medical Treatment in Georgia** - You have mentioned that the purpose of your visit to Georgia was for medical or health reasons. Could you please tell me what type of treatment or surgery you have received and where? *(Overall picture)*

	N	Location
Surgical Operation/Procedure	8 respondents	Tbilisi – 7 respondents Kutaisi – 1 respondent
Consultation with Physician	15 respondents	Tbilisi – 12 respondents Lagodekhi – 1 respondent Rustavi – 1 respondent Refused to answer – 1 respondent
Medical Examination (analysis, x-ray, ultrasound, tomography, etc.)	21 respondents	Tbilisi – 18 respondents Marneuli – 1 respondent Lagodekhi – 1 respondent Refused to answer – 1 respondent
Recovery/rehabilitation	5 respondents	Borjomi – 2 respondents Kutaisi – 1 respondent

		Sairme – 1 respondent Ckaltubo – 1 respondent
Dental Treatment	2 respondents	Tbilisi – 1 respondent Rustavi – 1 respondent
Childbirth/Hysterectomy/Gynecological	2 respondents	Tbilisi – 1 respondent Marneuli – 1 respondent
Diagnosis/Treatment of Tuberculosis	2 respondents	Tbilisi – 2 respondents

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*International visitors with leisure/recreation/vacation purpose N=1669*)

Yes	9%
No	91%

**Wine Tourism** - Was the fact that Georgia has an important and growing wine industry a primary reason for your visit? (*By country of residence for international visitors with leisure/recreation/vacation purpose N=1669*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	7%	6%	10%	11%	16%	9%	10%
No	93%	94%	90%	89%	84%	91%	90%

**Winter Tourism** - Did you come to Georgia to undertake winter activities - whether or not you actually participated in such activities? (*International visitors with leisure / recreation / vacation purpose N=722 – from Waves IV+V only*)

Yes	3%
No	97%

**Winter Tourism** - Did you come to Georgia to undertake winter activities - whether or not you actually participated in such activities? (*By country of residence for international visitors with leisure/recreation/vacation purpose N=722 - from waves IV+V only*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	1%	18%	8%	1%	30%	13%	0%
No	100%	83%	93%	99%	70%	87%	100%

**Employment in Georgia** - Concerning your employment, are/were you being paid by a resident Georgian company, the Georgian Government or foreign business registered in Georgia? (*International tourists with employment purpose of visit, N=129*)

Yes	17%
No	68%
Refused to Answer	16%

**MICE Tourism** - Was your primary reason for visiting Georgia on this trip any of the following? (*International tourists with business or professional purpose of visit N=503*)

Corporate/Business Meeting, Seminar, Workshop or Presentation	42%
Conference, Congress, Forum	7%
Incentive Tour Organized by a Business	2%
Exhibition/Trade Fair	2%
Established a Company	1%
I have not participated in any type of event	47%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	1%	31%	36%	22%
Rest and Relaxation	66%	33%	17%	39%
Tasting Georgian Cuisine	46%	37%	45%	36%
Experiencing Georgia's Nature/Scenery/ Landscape	62%	24%	29%	36%
Tasting Georgian Wine	31%	25%	32%	23%
Shopping	9%	16%	9%	18%
Visiting Georgia's Historical Sites	29%	13%	18%	18%
Exploring Georgia's Architecture	29%	10%	12%	17%
Experiencing Georgian Hospitality	16%	13%	15%	12%
Experiencing Georgia's Nightlife and Entertainment	11%	8%	3%	7%
Experiencing Georgia's Culture and Folklore	9%	6%	7%	6%
Undertaking Outdoor Adventurous Activities	5%	5%	2%	4%
I Don't Know/Hard to Answer	0%	1%	1%	1%

**Main Fields of Interest when Planning Trip to Georgia** - Please tell me, prior to travelling to Georgia on this trip, which of the following did you anticipate undertaking? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	16%	20%	26%	31%	17%	12%	18%
Rest and Relaxation	47%	48%	30%	32%	42%	45%	39%
Tasting Georgian Cuisine	20%	56%	46%	32%	51%	55%	51%
Experiencing Georgia's Nature/ Scenery/ Landscape	37%	45%	32%	27%	57%	51%	51%
Tasting Georgian Wine	11%	40%	27%	19%	43%	49%	35%
Shopping	11%	14%	23%	27%	12%	9%	11%
Visiting Georgia's Historical Sites	12%	27%	22%	7%	38%	38%	35%
Exploring Georgia's Architecture	20%	20%	21%	4%	30%	23%	20%
Experiencing Georgian Hospitality	8%	20%	9%	11%	27%	26%	22%
Experiencing Georgia's Nightlife and Entertainment	10%	7%	4%	3%	12%	11%	14%
Experiencing Georgia's Culture and Folklore	5%	7%	5%	3%	21%	17%	17%
Undertaking Outdoor Adventurous Activities	4%	3%	2%	2%	12%	11%	5%
I Don't Know/Hard to Answer	0.4%	0.1%	0.2%	2%	0.4%	1%	0.4%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Didn't have any Interest	1%	31%	28%	22%
Rest and Relaxation	64%	29%	15%	36%
Experiencing Georgia's Nature/Scenery/ Landscape	61%	21%	29%	35%
Tasting Georgian Cuisine	45%	33%	54%	35%
Tasting Georgian Wine	32%	23%	37%	23%
Shopping	11%	16%	14%	19%
Visiting Georgia's Historical Sites	27%	9%	17%	15%
Exploring Georgia's Architecture	29%	7%	12%	15%

Experiencing Georgian Hospitality	16%	10%	19%	12%
Experiencing Georgia's Nightlife and Entertainment	11%	6%	4%	6%
Experiencing Georgia's Culture and Folklore	8%	3%	6%	5%
Undertaking Outdoor Adventurous Activities	4%	1%	2%	2%
I Don't Know/Hard to Answer	0.1%	1%	1%	1%

**Major Interests when Traveling in Georgia** - Please tell me, what did you do during your current visit in Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Didn't have any Interest	16%	21%	26%	31%	15%	10%	13%
Rest and Relaxation	40%	46%	29%	29%	41%	42%	39%
Experiencing Georgia's Nature/ Scenery/ Landscape	34%	43%	31%	26%	56%	51%	52%
Tasting Georgian Cuisine	14%	54%	46%	32%	55%	60%	57%
Tasting Georgian Wine	9%	44%	27%	19%	45%	53%	39%
Shopping	13%	17%	21%	28%	16%	13%	17%
Visiting Georgia's Historical Sites	8%	25%	20%	5%	36%	36%	33%
Exploring Georgia's Architecture	18%	17%	19%	4%	29%	23%	20%
Experiencing Georgian Hospitality	7%	21%	9%	11%	29%	29%	25%
Experiencing Georgia's Nightlife and Entertainment	9%	6%	4%	3%	11%	10%	16%
Experiencing Georgia's Culture and Folklore	3%	5%	4%	2%	18%	16%	16%
Undertaking Outdoor Adventurous Activities	1%	1%	2%	1%	12%	9%	4%
I Don't Know/Hard to Answer	1%	0.1%	0.2%	2%	1%	1%	0.4%

**Popular Locations** - Please tell me which locations, sites and/or attractions you visited in Georgia during this visit? (*Overall picture*)

	%	Average Number of Nights
Tbilisi	42%	2
Batumi (Kvariati, Botanical Garden, Gonio Fortress)	39%	1
Marneuli	8%	1
Rustavi	7%	0
Kobuleti	5%	5
Kutaisi (Gelati Monastery, Bagrat's Cathedral, Tskaltubo Caves)	3%	1
Mtskheta (Svetitskhoveli Cathedral, Jvari Monastery, Armazi Fortress, Samtavro, Pompey's Bridge)	3%	0
Lagodekhi (National Park)	3%	0
Kazbegi (Gergeti Trinity Church)	3%	2
Ureki	2%	5
Gori (Stalin's Museum, Gori Fortress)	2%	1
Borjomi (Likani, Mineral waters, Green Monastery, Timotesubani, National Park)	2%	1
Bolnisi (Bolnisi Sioni Church)	2%	3
Kabali	2%	0
Sighnaghi (Bodbe Monastery)	2%	0
Zugdidi (Dadiani's Palace)	1%	<sup>2</sup>
Mestia & Ushguli	1%	
Gardabani	1%	
Dmanisi (Dmanisi Museum - Archeological Monument)	1%	
Telavi (King Erekle's Museum and Palace, Tsinandali Palace)	1%	
Bakuriani (Kokhtagora, Didveli)	1%	
Gudauri	1%	
Poti	1%	
Tusheti	1%	
Vardzia (Vanis Kvabebi, Sapara, Khertvisi)	1%	
Ananuri (Church and Zhinvali Reservoir)	1%	
Davit Gareja	1%	
Uflistsikhe	0.3%	
Anaklia	0.3%	
Shatili & Mutso	0.2%	
Kvareli (Kvareli Lake, Nekresi)	0.2%	
Sairme	0.1%	
Shovi & Utsera (Shaori Lake, Mineral Waters, Nikortsminda)	0.1%	
Other Kakheti	1%	
Other Kvemo Kartli	1%	

<sup>2</sup> Average number of nights for places which are marked grey are not presented since due to the small sample size it is not statistically recommended.

Other Imereti	1%	
Other Samegrelo-Zemo Svaneti	0.4%	
Other Shida Kartli	0.3%	
Other Samtskhe-Javakheti	0.3%	
Other Guria	0.2%	
Other Racha-Lechkhimi	0%	
Other Mtskheta-Mtianeti	0%	
Other Adjara	0%	
Other	0.2%	
None - Transit	5%	n/a

## EXPENDITURE DURING TRAVEL IN GEORGIA

### **Expenditure Structure**

Number of Total Visitors	3,457,823
Total Expenditure	GEL 1,832,646,190
Expenditure per Visitor	GEL 530

### **Expenditures by Purpose of Visit**

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Leisure/ Recreation/ Vacation	40%	GEL 876,903,786	1,383,129	GEL 634
Visiting Friends and Relatives	25%	GEL 351,833,592	864,456	GEL 407
Business or Professional	7%	GEL 239,869,568	242,048	GEL 991
Other	27%	GEL 364,039,244	968,190	GEL 366

### **Expenditures by Country of Residence**

	Proportion of Visitors	Total Expenditure	Number of Visitors	Expenditure per Visitor
Turkey	30%	GEL 480,291,661	1,037,347	GEL463
Russia	9%	GEL 238,382,264	311,204	GEL766
Armenia	22%	GEL 287,552,538	760,721	GEL378
Azerbaijan	25%	GEL 274,897,008	864,456	GEL318
Central and Eastern Europe	5%	GEL 141,079,056	172,891	GEL816
Other Europe	4%	GEL 205,948,057	138,313	GEL1,489
Other	5%	GEL 204,495,606	172,891	GEL1,319

**Expenditure on Services** - Please tell me how much you have spent on the items listed during this visit to Georgia (excluding those services included in the tour package)?

	Total Expenditure	Share of Total Expenditure
Served Food and Drinks	GEL 513,140,933	28%
Accommodation	GEL 366,529,238	20%
Shopping	GEL 366,529,238	20%
Cultural and Entertainment Services	GEL 109,958,771	6%
Domestic Ground Transportation	GEL 146,611,695	8%
Sports and Recreational Services	GEL 73,305,848	4%
Tour Package	GEL 54,979,386	3%
Medical Services	GEL 36,652,824	2%
Domestic Air Transportation	GEL 3,665,292	0.2%
Other Expenditure	GEL 161,272,965	9%



## ORGANIZER OF VISITS TO GEORGIA AND INFORMATION SOURCES ABOUT GEORGIA

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Myself	77%	77%	39%	70%
Family Members/Friends	18%	22%	3%	16%
My Business/Company	3%	1%	53%	7%
Foreign Travel Agency/ Tour Operator	2%	0.1%	1%	1%
Georgian-based Travel Agency / Tour Operator	0.4%	0%	0.2%	0.2%
Other	0.3%	0%	4%	0.3%
Did not Plan - Transit	0.1%	0%	0%	4%

**Organizer of Visit to Georgia** - Please tell me how this trip to Georgia was organized? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Myself	75%	74%	56%	79%	65%	70%	62%
Family Members/Friends	11%	13%	29%	16%	13%	7%	12%
My Business/Company	10%	4%	6%	3%	13%	14%	17%
Foreign Travel Agency/ Tour Operator	1%	0.1%	1%	0.2%	2%	6%	4%
Georgian-based Travel agency / Tour operator	0.1%	0%	0%	0%	1%	2%	1%
Other	0.4%	0%	2%	0.2%	1%	0%	2%
Did not Plan - Transit	4%	8%	7%	2%	6%	1%	3%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I Don't Remember	21%	14%	8%	17%
Previous Visit	37%	64%	48%	53%
Friends & Relatives	36%	34%	22%	31%
Television/Radio	9%	6%	7%	8%
Internet	8%	1%	9%	5%
Organization/Business	1%	0.7%	34%	4%

Partner				
Newspaper/Other Magazine	3%	1%	2%	2%
Travel Guidebook	3%	0.1%	2%	2%
Books	1%	1%	1%	2%
Specialized Tourism, Travel or Special Interest Magazine	1%	0.2%	1%	1%
Travel Agency / Tour Operator	1%	0%	0.1%	1%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0.3%	0.1%	1%	0.3%
Travel Fairs	0.3%	0.1%	0%	0.2%
Georgian Embassy/Consulate	0.2%	0%	0.4%	0.1%
Other	0%	0%	0%	0%

**Information Sources on Georgia** - Please tell me, for this trip what were your main sources of information on Georgia? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I Don't Remember	24%	13%	9%	21%	7%	16%	5%
Previous Visit	45%	58%	67%	63%	32%	30%	20%
Friends & Relatives	26%	36%	50%	16%	42%	30%	40%
Television/Radio	8%	8%	16%	0%	11%	3%	9%
Internet	2%	5%	0.4%	1%	27%	22%	27%
Organization/Business Partner	2%	3%	3%	1%	11%	13%	19%
Newspaper/Other Magazine	2%	2%	3%	0%	4%	2%	4%
Travel Guidebook	1%	0.3%	0%	0.1%	8%	13%	8%
Books	1%	2%	3%	0%	2%	2%	2%
Specialized Tourism, Travel or Special Interest Magazine	0.3%	0.4%	0.4%	0%	5%	3%	2%
Travel Agency/Tour Operator	0.4%	0%	0.2%	0%	1%	5%	4%
Promotional Materials Published by the Georgian Government: Tourist Booklets, Fliers, Maps	0.3%	0%	0%	0%	0%	2%	3%
Travel Fairs	0.2%	0%	0%	0%	1%	1%	1%

Georgian Embassy/Consulate	0.1%	0.1%	0%	0%	1%	0.4%	0.2%
Other	0%	0%	0%	0%	0.4%	0%	0.1%

**Websites and Portals Used to Obtain Information on Georgia** - Please tell me from which travel-related websites you obtained information about Georgia? (*Visitors who got information from internet – N=347*)

I cannot recall any specific website	36%	<a href="http://www.S7.ru">www.S7.ru</a>	2%
<a href="http://www.lonelyplanet.com">www.lonelyplanet.com</a>	24%	<a href="http://www.worldtravelguide.com">www.worldtravelguide.com</a>	2%
<a href="http://www.georgia.travel">www.georgia.travel</a>	18%	<a href="http://www.museum.ge">www.museum.ge</a>	1%
<a href="http://www.wikitrip.com">www.wikitrip.com</a>	13%	<a href="http://www.couchsurfing.com">www.couchsurfing.com</a>	1%
<a href="http://www.kaukaz.pl">www.kaukaz.pl</a>	9%	<a href="http://www.georgia.ge">www.georgia.ge</a>	1%
<a href="http://www.tripadvisor.com">www.tripadvisor.com</a>	8%	<a href="http://www.kaukaz.com">www.kaukaz.com</a>	1%
<a href="http://www.info-tbilisi.ge">www.info-tbilisi.ge</a>	7%	<a href="http://www.svanetitrekking.ge">www.svanetitrekking.ge</a>	1%
<a href="http://www.map.ge">www.map.ge</a>	6%	<a href="http://www.gudauri.com">www.gudauri.com</a>	1%
<a href="http://www.expedia.com">www.expedia.com</a>	3%	<a href="http://www.e-info.ge">www.e-info.ge</a>	1%
<a href="http://www.lametayel.net">www.lametayel.net</a>	3%	Other	8%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	3%	2%	8%	3%
No	97%	98%	92%	97%

**Flight Tickets** - Please tell me whether your flight tickets were purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	1%	6%	0%	0%	15%	18%	10%
No	99%	95%	100%	100%	85%	83%	90%

**Train Tickets** - Please tell me whether your train tickets were purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0%	0%	1%	0%
No	100%	100%	99%	100%

**Train Tickets** - Please tell me whether your train tickets were purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	1%	0%	1%
No	100%	100%	100%	100%	99%	100%	99%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	1%	0%	2%	1%
No	99%	100%	98%	99%

**Accommodation/Hotel** - Please tell me whether your accommodation/hotel was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	1%	0%	5%	4%	3%
No	100%	100%	99%	100%	95%	96%	97%

**Tour Package** - Please tell me whether your tour package was purchased online (*By purpose of visit*)

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	0%	0%	0%	0%
No	100%	100%	100%	100%

**Tour Package** - Please tell me whether your tour package was purchased online (*By country of residence*)

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	0%	0%	0%	0%	0%	1%	1%
No	100%	100%	100%	100%	100%	99%	100%

## PROBLEMS ENCOUNTERED IN GEORGIA

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
I have not Encountered any Problems	81%	91%	75%	84%
Transportation (roads/traffic)	5%	3%	10%	5%
Public Toilets	4%	3%	4%	4%
Foreign Language Capacity	4%	2%	9%	3%
Expensive Hotels/Expensive Restaurants/Expensive Food Products/High Tariffs in General	3%	1%	4%	3%
Poor Service in Restaurants/Food Spots	2%	1%	2%	1%
Navigation/Road Signs/Interpretation	2%	1%	2%	1%
Untidy/Dirty Streets, Parks, Squares	2%	1%	2%	1%
Information on Transport Timetables and Destinations	2%	0.4%	1%	1%
Poor Service in Hotels/Guesthouses	1%	0.4%	2%	1%
Lack of Tourist Maps	2%	0.2%	1%	1%
Lack of Tourism Informational Centers/Points	1%	0.3%	2%	1%
Lack of Foreign Language Menus	1%	0%	2%	1%
Border Crossing	1%	0.2%	0.2%	1%
Sanitary Conditions in Hotels and Restaurants	1%	0.4%	1%	1%
Attitude of Police	0.3%	0%	0.1%	0.4%
Other	5%	2%	7%	3%

**Problems Encountered in Georgia** - Please tell me whether you encountered any specific problems or annoyances while travelling in Georgia? If yes, what were they? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
I have not Encountered any Problems	85%	81%	86%	88%	76%	72%	58%
Transportation (roads/traffic)	6%	6%	2%	3%	10%	8%	8%
Public Toilets	6%	5%	2%	2%	8%	10%	12%
Foreign Language Capacity	4%	1%	1%	1%	7%	14%	23%
Expensive Hotels / Expensive Restaurants/Expensive Food Products / High Tariffs in General	4%	1%	2%	3%	2%	4%	2%
Poor Service in Restaurants/Food Spots	1%	3%	2%	1%	3%	1%	4%
Navigation/Road Signs/Interpretation	1%	1%	2%	1%	3%	3%	5%
Untidy/Dirty Streets, Parks, Squares	1%	2%	1%	1%	4%	4%	4%
Information on Transport Timetables and Destinations	1%	2%	0.2	1%	4%	3%	3%
Poor Service in Hotels/Guesthouses	1%	0%	1%	1%	1%	2%	1%
Lack of Tourist Maps	0.2%	2%	0%	0.2%	2%	5%	5%
Lack of Tourism Informational Centers/ Points	0.2%	1%	0.2%	0.4%	2%	4%	2%
Lack of Foreign Language Menus	0.3%	1%	0%	0%	2%	2%	4%
Border Crossing	0.2%	2%	0%	1%	1%	1%	1%
Sanitary Conditions in Hotels and Restaurants	0.2%	1%	0%	1%	1%	2%	1%
Attitude of Police	1%	0%	1%	0%	0%	0.4%	0.3%
Other	3%	6%	5%	2%	6%	10%	17%

## SATISFACTION FROM THE TRIP TO GEORGIA AND PLANS FOR A FUTURE VISIT

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISSATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Very Satisfied	67%	72%	67%	66%
Satisfied	31%	25%	31%	31%
Dissatisfied	1%	1%	1%	1%
I Don't Know/Hard to Answer	1%	2%	1%	2%
Average Satisfaction	3.7	3.7	3.7	3.7

**Overall Satisfaction** – Overall, how satisfied were you with your visit to Georgia? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISSATISFIED” AND “4” VERY SATISFIED (By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Very Satisfied	63%	74%	57%	73%	73%	76%	56%
Satisfied	33%	21%	40%	25%	23%	20%	42%
Dissatisfied	1%	3%	1%	1%	2%	2%	1%
I Don't Know/Hard to Answer	3%	2%	2%	1%	1%	2%	1%
Average Satisfaction	3.6	3.7	3.6	3.7	3.7	3.8	3.6

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? *USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISSATISFIED” AND “4” VERY SATISFIED (By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Georgian Wine	3.7	3.8	3.8	3.7
Environment/Landscape of Georgia	3.7	3.8	3.8	3.7
Historical and Cultural Heritage	3.7	3.8	3.8	3.7
Georgian Hospitality	3.7	3.8	3.8	3.7
Georgian Cuisine	3.7	3.8	3.7	3.7
Restaurant Facilities	3.4	3.6	3.6	3.5

and Service				
Hotel Facilities and Service	3.4	3.3	3.5	3.4
Guesthouse/B&B Facilities and Services	3.3	3.5	3.7	3.4
Tourism Informational Centre Service	3.3	3.5	3.3	3.3
Value for Money	3.4	3.4	3.3	3.3
Transport Services/ Infrastructure	3.2	3.4	3.2	3.3
Travel Agency / Tour Operator Service	3.3	3.4	3.3	3.3

**Satisfaction with Various Tourist Attractions, Facilities and Services** - If you have used any of the following, could you please tell me how satisfied you were in terms of quality? **USE 4 POINT SCALE FOR EVALUATION, WHERE “1” STANDS FOR “VERY DISSATISFIED” AND “4” VERY SATISFIED (By country of residence)**

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Georgian Wine	3.7	3.9	3.7	3.9	3.8	3.7	3.8
Environment/Landscape of Georgia	3.6	3.8	3.7	3.8	3.8	3.8	3.7
Historical and Cultural heritage	3.6	3.9	3.6	3.9	3.8	3.8	3.8
Georgian Hospitality	3.6	3.8	3.6	3.8	3.8	3.9	3.7
Georgian Cuisine	3.6	3.9	3.6	3.8	3.8	3.8	3.6
Restaurant Facilities and Service	3.5	3.5	3.4	3.5	3.5	3.5	3.4
Hotel Facilities and Service	3.4	3.6	3.3	3.3	3.5	3.5	3.3
Guesthouse / B&B Facilities and Services	3.3	3.4	3.5	3.7	3.4	3.4	3.3
Tourism Informational Centre Service	3.3	3.4	3.5	3.6	3.2	3.3	3.2
Value for Money	3.3	3.3	3.2	3.6	3.3	3.3	3.3
Transport Services/ Infrastructure	3.1	3.3	3.5	3.4	3.2	3.1	3.1
Travel Agency / Tour Operator Service	3.3	3.5	3.5	3.6	3.0	3.3	3.0

**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	85%	93%	89%	87%
Maybe	14%	7%	10%	12%



No	1%	0%	0%	1%
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**Likelihood to Make a Future Return Trip to Georgia** - Do you have an interest or plan to visit Georgia again? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	81%	90%	91%	95%	79%	79%	83%
Maybe	18%	10%	9%	5%	20%	19%	16%
No	1%	0%	1%	0%	2%	2%	1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By purpose of visit)*

	Leisure/ Recreation/ Vacation	Visiting Friends and Relatives	Business or Professional	Total
Yes	85%	85%	83%	81%
Maybe	14%	15%	16%	18%
No	1%	0%	1%	1%
I Don't Know	0%	0%	1%	0.1%

**Likelihood to Recommend to Friends and Family** - Would you recommend Georgia as a holiday destination to your friends and relatives? *(By country of residence)*

	Turkey	Russia	Armenia	Azerbaijan	Central and Eastern Europe	Other Europe	Other
Yes	76%	84%	76%	89%	86%	87%	83%
Maybe	23%	14%	23%	11%	11%	11%	15%
No	1%	1%	1%	1%	3%	2%	2%
I Don't Know	0.2%	0%	0%	0%	0%	0%	0.2%

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