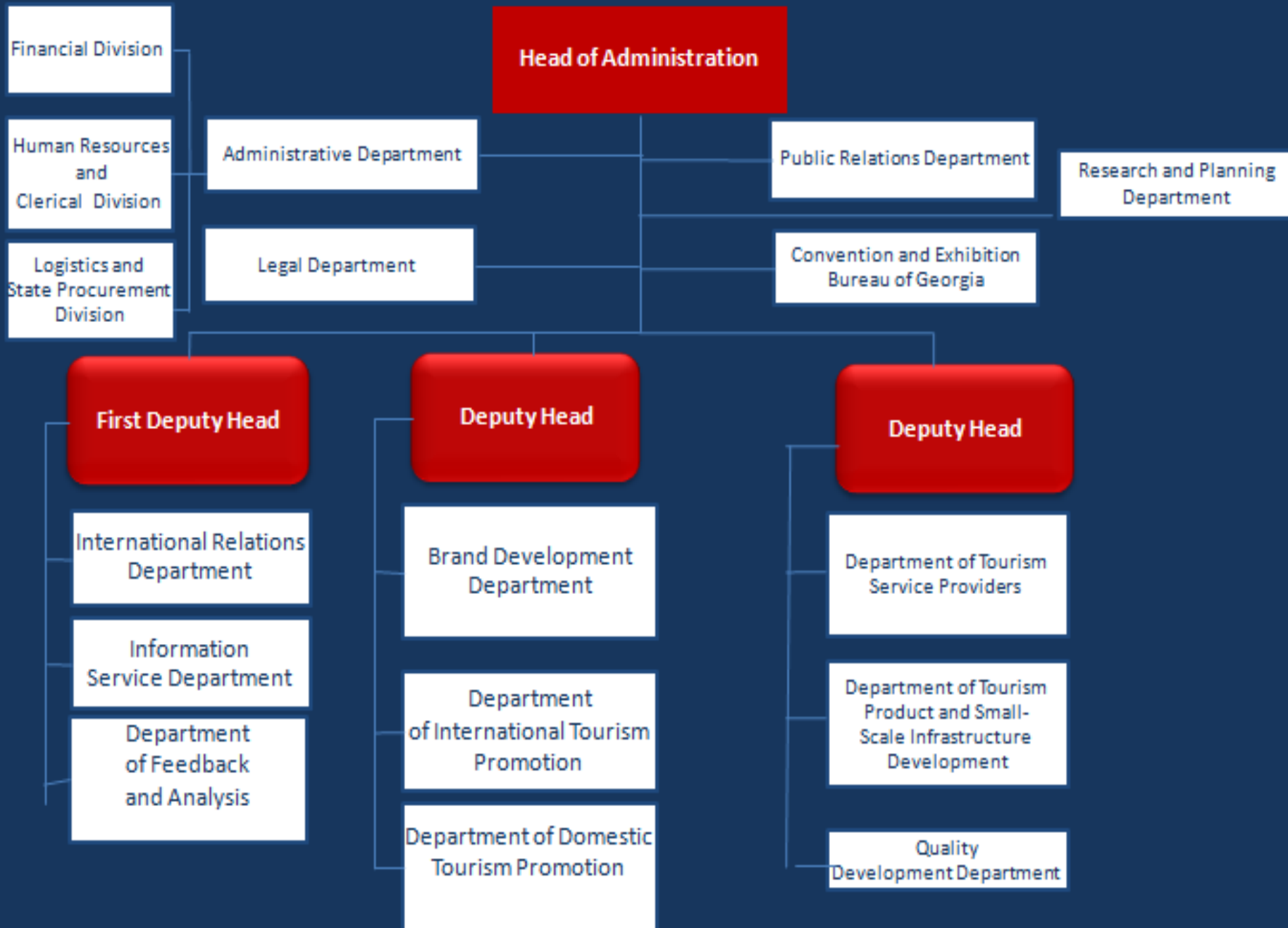


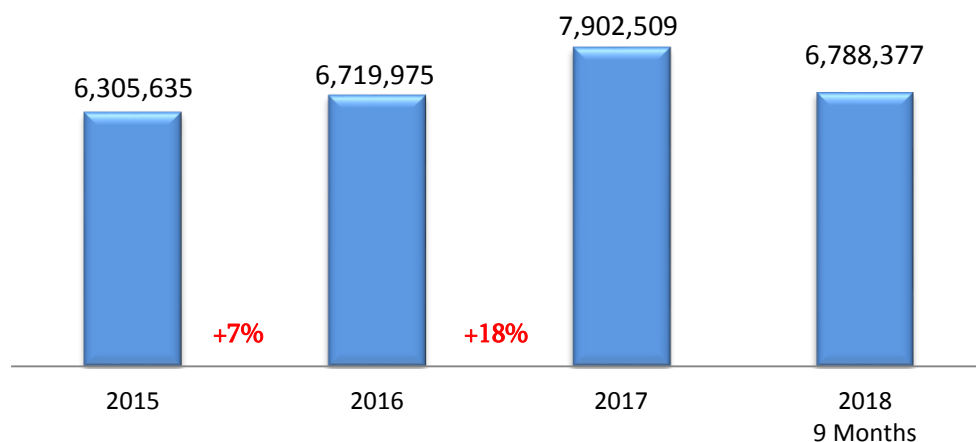


GEORGIAN NATIONAL
TOURISM ADMINISTRATION

- Marketing and promoting Georgia around the world
- Collecting, analyzing and publishing statistical data, information about trends and economic indicators
- Supporting the private sector
- Emphasizing the needs of the sector and bringing expertise to the relevant government stakeholders
- Initiating development of the tourism strategy and vision in partnership with all stakeholders

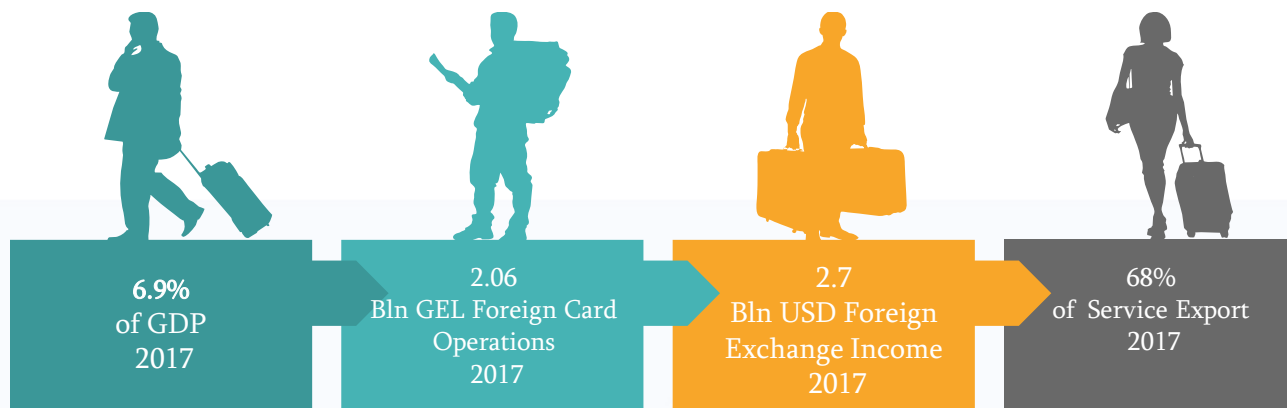


Number of International Visits



Source: Ministry of Internal Affairs of Georgia

country	2018: 9 months	2017-2018 %
Russia	1,109,706	+22.9%
Azerbaijan	1,094,847	+10.9%
Armenia	956,076	+0.1%
Turkey	891,751	+17.2%
Georgia (non resident)	363,766	+5%
Iran	242,739	+3.1%
Ukraine	141,181	+3.2%
Israel	121,548	+35.2%
Poland	55,142	+31.4%
Germany	52,288	+52.4%





Georgia

Main Trends in International Visits

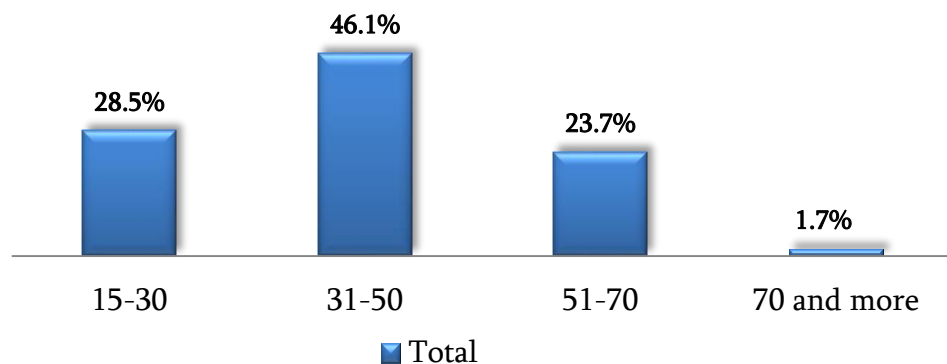
- The share of trips from neighboring countries in the total number of international traveler trips is decreasing
- Iran outstripped Ukraine in the number of international visitor trips
- Trips conducted by air transport is increasing significantly
- Awareness about Georgia is increasing among the high-spending segment of Gulf countries
- The number of international visitor trips from the CIS and European Union to Georgia is increasing
- Russia is the leader in number of international tourist trips
- The share of tourist trips in the number of international visitor trips from non-neighboring countries is comparably larger
- Record growth in total visitor trips was primarily caused by tourist trips



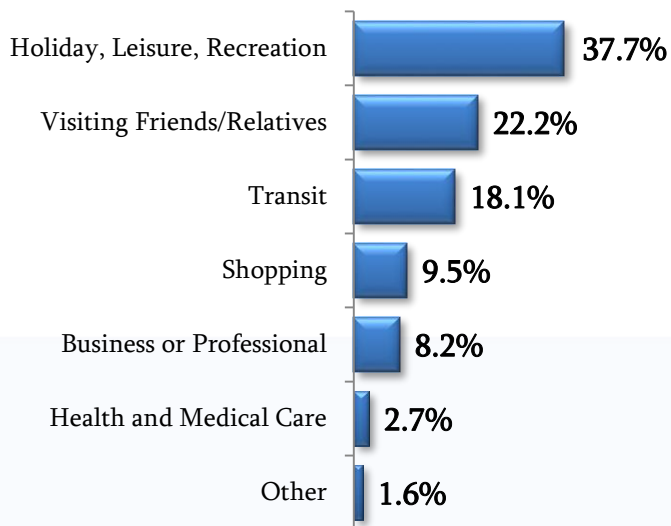
Georgia

International Visitors (2017)

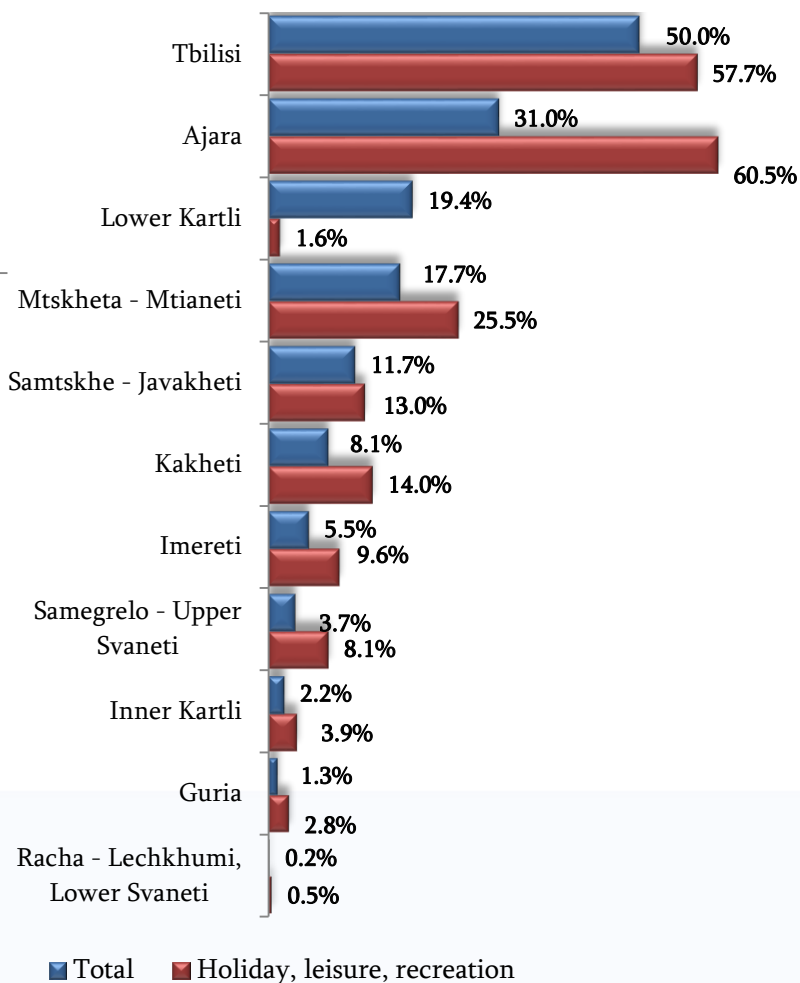
International Visitors by Age Groups



Main Purpose of Visit



Most Visited Regions



Source: National Statistics Office of Georgia

International Visitors (2017)

Total Expenditure 5.8 Bln GEL

Average Expenditure 889 GEL

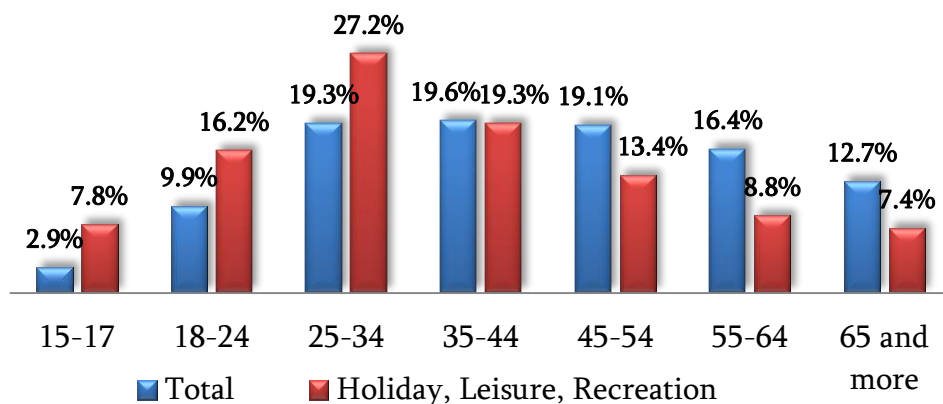
Expenditure Components	Total Expenditure GEL (X1000)	Share of Total Expenditure %
Food and Drinks	1,476,534.5	26%
Accommodation	1,326,904.5	23%
Cultural and Entertainment Service	1,065,961.7	18%
Shopping	789,717.4	14%
Local Transport	483,448.3	8%
Other Expenditure	619,024.7	11%



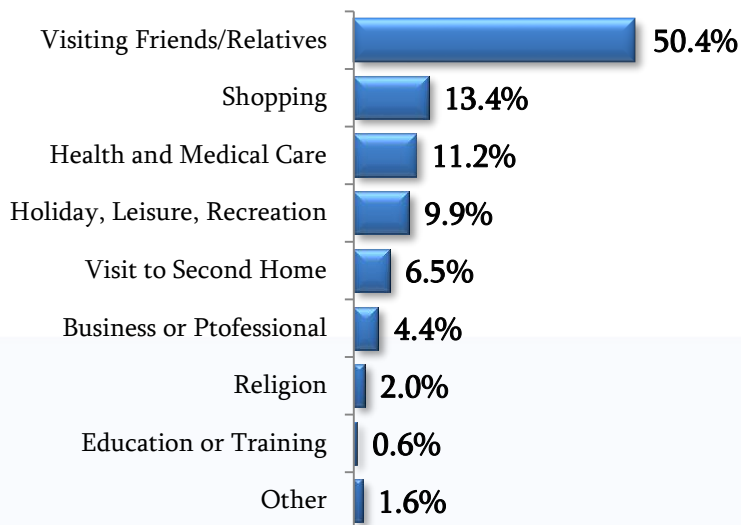
Georgia

Domestic Visitors (2017)

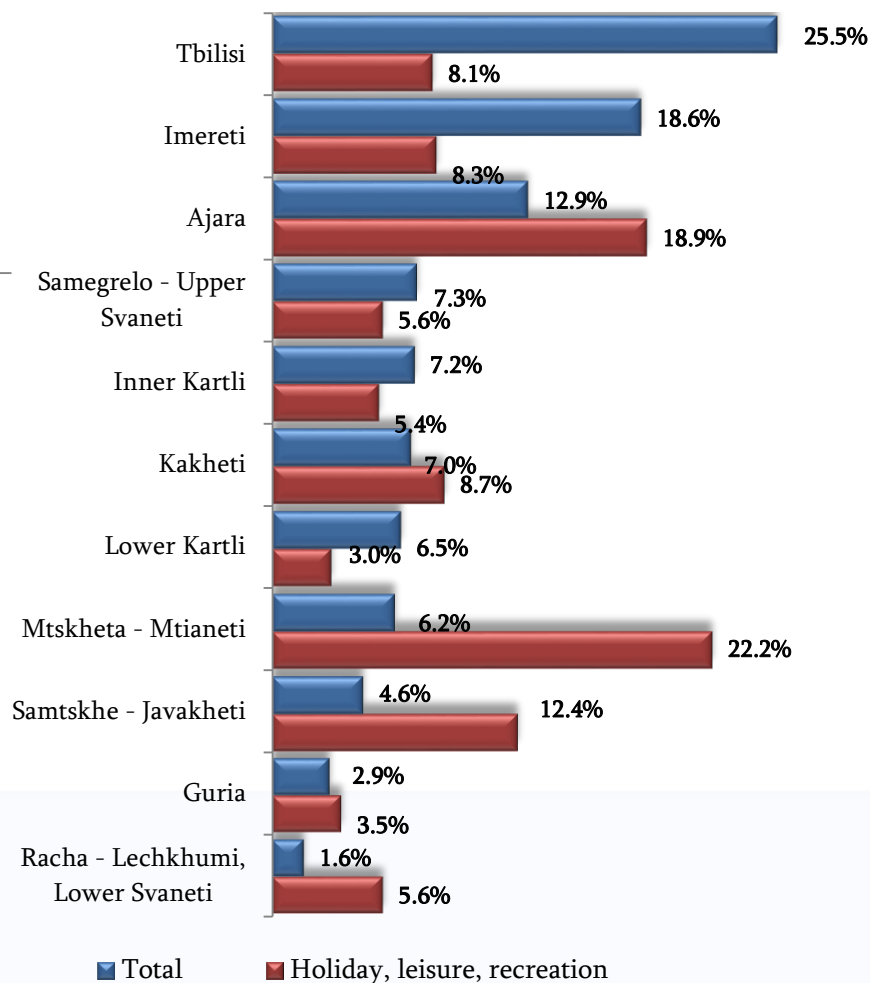
Domestic Visitors by Age Groups



Main Purpose of Visit



Most Visited Regions



Source: National Statistics Office of Georgia

Economic Indicators





Georgia

Country's tourism promotion strategy

Vision

- By 2025, Georgia will be well known as a premier, year-round, high quality tourism destination, centered on its unique cultural and natural heritage, world-class customer service, and timeless tradition of hospitality.
- Georgia will be at the forefront of tourism competitiveness, through strategic investments in infrastructure, education, marketing, and the development of unique Georgian visitor experiences that appeal to high-value markets around the globe.
- Tourism will significantly increase its contribution to Georgian economic growth and development, through increases in visitor spending. The focus will be on the quality and diversity of visitor arrivals, not total number of visitors.

Country's tourism promotion strategy

Strategic Objectives

- 1 Respect, preserve and enhance Georgia's natural and cultural heritage
- 2 Create unique and authentic visitor experiences centered on those natural and cultural assets
- 3 Enhance competitiveness, through delivery of world-class visitor services
- 4 Attract higher spending markets, through increased and more effective marketing and promotion
- 5 Expand and enhance Georgia's ability to collect and analyze tourism data and measure industry performance

- 6 Enhance the business environment, to facilitate increased foreign and domestic investment
- 7 Expand public and private sector investment in tourism
- 8 Build partnerships between government, industry, non-governmental organizations and communities that will be needed to achieve all of the above

Where do we want to go?

Our Goals

The Georgia 2025 tourism development goals set out by the stakeholders are:

Create unique, high quality visitor experiences that are increasingly in demand in the world's highest spending, outward markets, centered on the country's rich mix of cultural and natural assets;

Improve air access from these high spending markets, and internal transport networks to facilitate the free flow of visitors to all within the country;

Improve data collection and market research capabilities, to better understand the demands and preferences of higher spending markets;

Use that research and additional marketing to communicate to more effectively target and communicate with these markets and raise awareness of Georgia as a world-class tourism destination;

Improve visitor services, from transportation to accommodation and interpretation, to fulfil the needs of these markets and ensure a positive "word of mouth" advertising and repeat visits.

Our Vision

By 2025, Georgia will be well known as a premier, year-round, high quality tourism destination, combined on its unique cultural and natural heritage, world-class customer service, and timeless tradition of hospitality.

Georgia will be at the forefront of tourism development, with its tourism industry leading in infrastructure, education, marketing, and the development of unique Georgian visitor experiences that appeal to high-value markets around the globe.

Tourism will significantly increase its contribution to Georgia's economic growth and development, and the industry will be on the quality and diversity of visitor arrivals, not total number of visitors.

Country's tourism promotion strategy

Where Do We Want to Go?

Component	2015	2025 Forecast
International visitor arrivals	6.3 million	11 million
International tourism receipts	US\$1.9 billion	\$6.6 billion

Tourism contribution to GDP	6.7%	7.9%
Average annual number of People Employed in Tourism	158,515	301,284
Average Spending Per Visitor	USD 328	USD 600
Average Length of Stay	5 days	7 days
Foreign Direct Investment in Tourism	\$723 million	\$1,178 million
% Arrivals from Turkey, Ukraine, Turkmenistan and CIS Countries	91%	70%
% Arrivals from other source markets	9%	30%



Georgia

Marketing Campaigns 2017

Marketing Expenses: **18,650,000 GEL**

Revenue from International Tourism: **2.75 Bln USD**

- Winter marketing campaign on 19 target markets
- Summer marketing campaign on 14 target markets



Expedia



ინტერნეტ კამპანიის შედეგები:

Results

15,837,104

Impressions

292,117,497



23 International
Tourism Fairs



683 journalists



239 Tour Operator

Georgia e Traveli
Viaggio nel fascino

CHECK IN
GEORGIA:

121

Cultural and Sport
Events



The
New York
Times



the
guardian

euronews.

BBC
travel

Forbes





Georgia

Existing Marketing Campaigns

➤ Winter online marketing campaign on 19 target markets

Germany; United Kingdom; Italy; Israel; Ukraine; Poland; Belarus; Azerbaijan, Kazakhstan; Russia; Turkey; Armenia; Lithuania; Latvia; Estonia; Kuwait; Bahrain; Saudi Arabia; United Arab Emirates

➤ Summer online marketing campaign on 14 target markets

Germany; Italy; Israel; Ukraine; Poland; Belarus; Azerbaijan; Kazakhstan; Russia; Turkey; Armenia; Lithuania; Latvia; United Arab Emirates



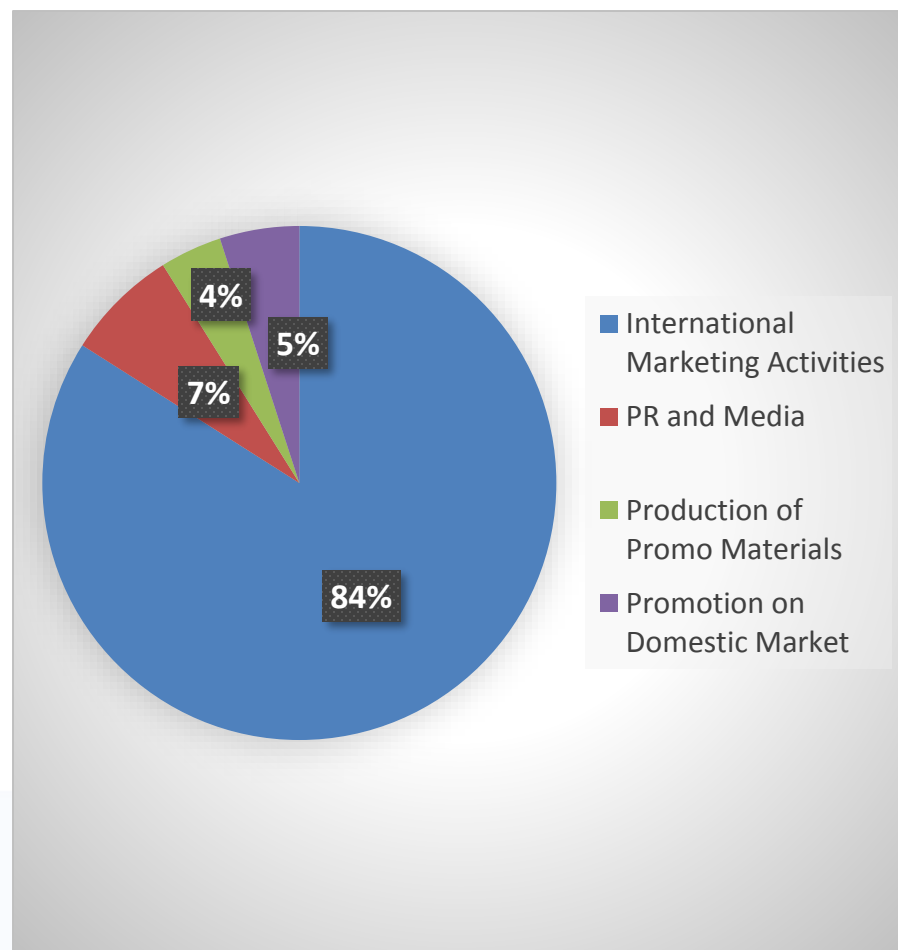
Sweden, Norway, Denmark, Germany, Israel, Italy, Poland, Turkey, Russia and Ukraine.



USA, United Kingdom and Germany.

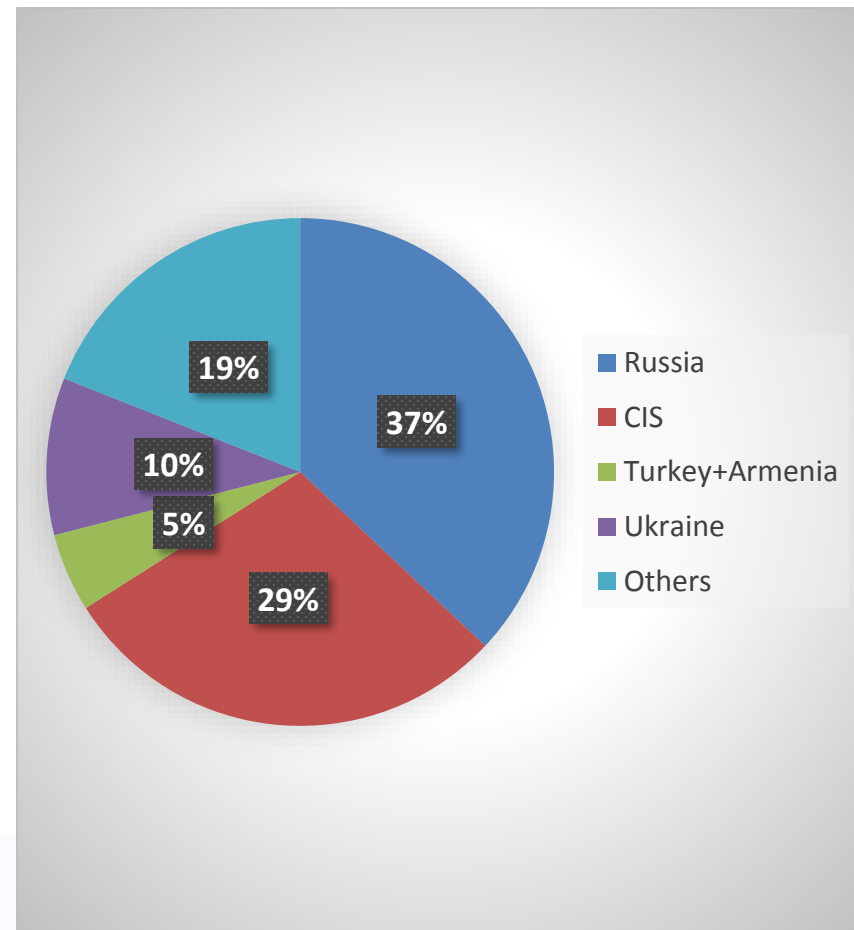
Marketing and Promotion Budget of GNTA (2017)

Marketing Budget Item	Amount (Gel)
Int'l Marketing Activities	22,443,500
Int'l Fairs and Exhibitions	3,075,500
Road Shows	170,000
Tv Advertising on channels	2,500,000
Web marketing	472,000
Writing articles	50,000
Promo campaigns	16,176,000
Production of Promo Material	1,050,000
Videos for Tv adv	250,000
Printing promo materials	200,000
Rebranding booklets	600,000
PR and Media	1,900,000
Press and Info Tours	1,900,000
Promotion on Domestic Market	1,330,000
Promotion of Domestic Tourism	1,030,000
Marketing for Domestic Tourism	300,000
Total	26,723,500

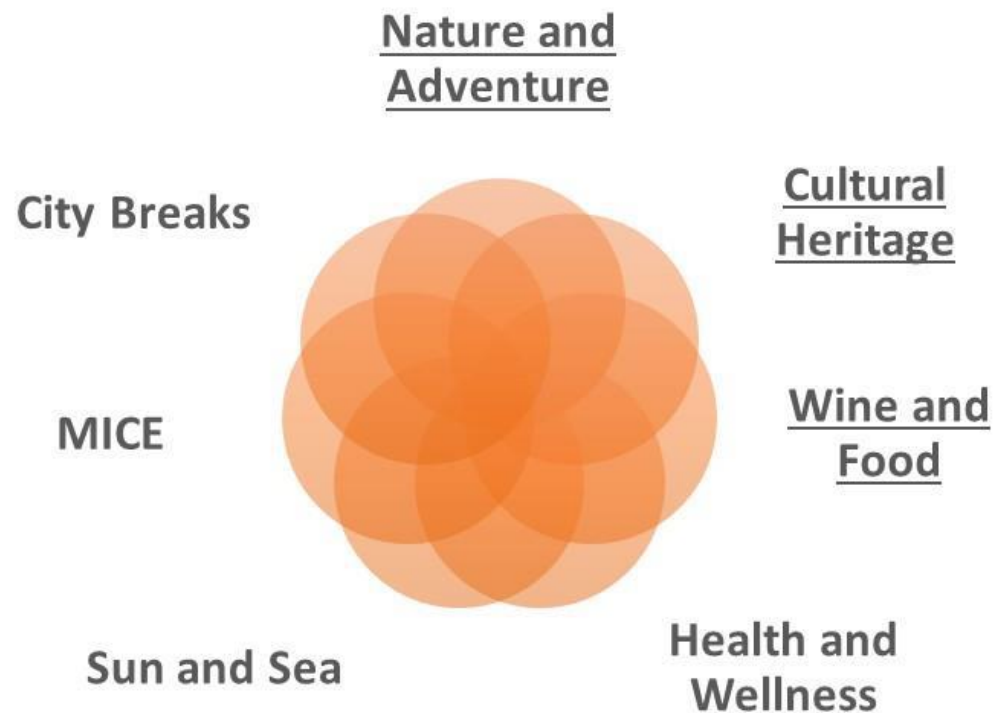


Budget Allocation per promotional campaign area 2017

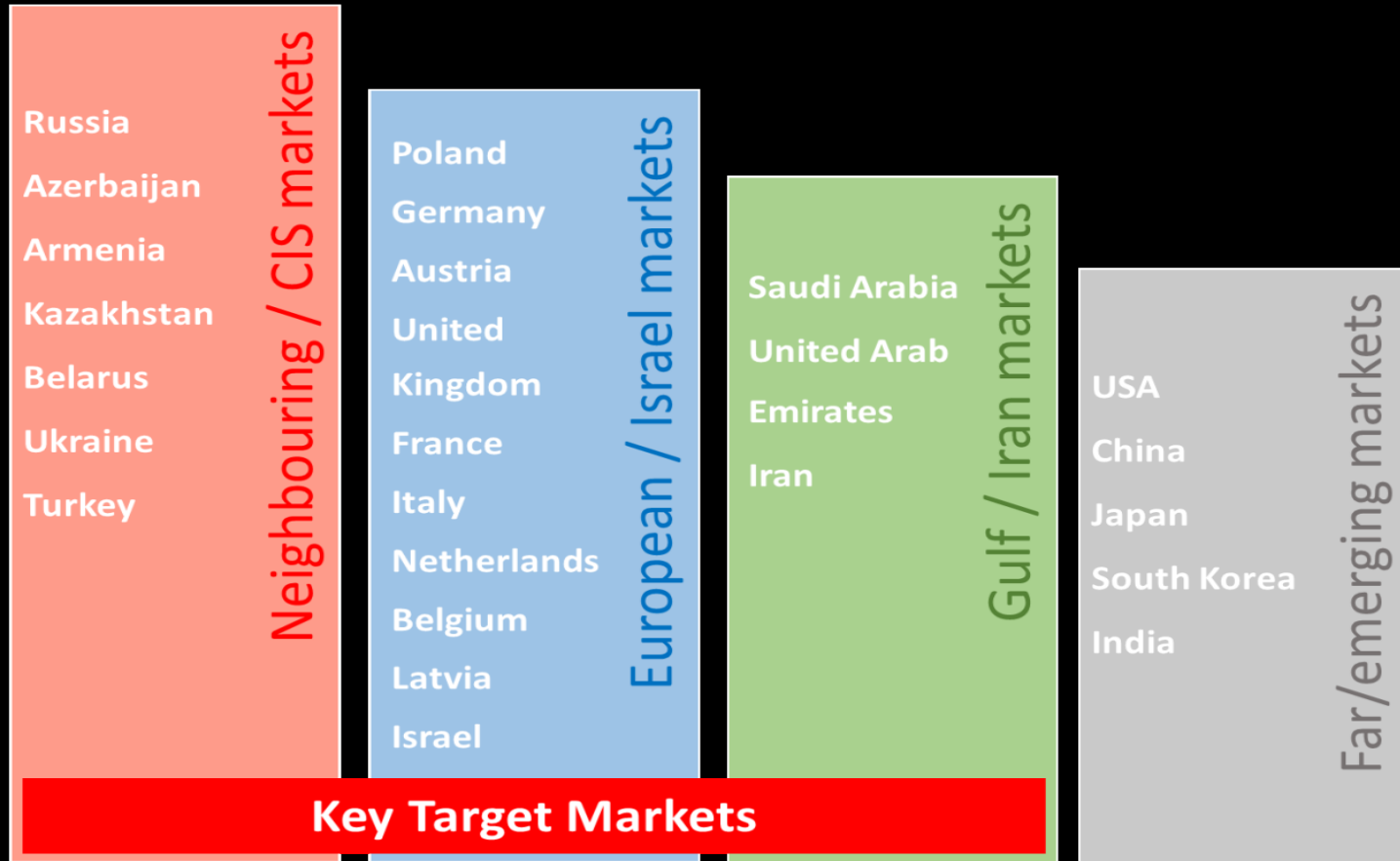
Country	Amount (Gel)
Russia	3,877,118
CIS	3,019,333
Turkey+Armenia	561,600
Ukraine	1,017,800
Sub-Total	8,475,851
Others	1,901,358
Total	10,377,209



Key Tourism Products



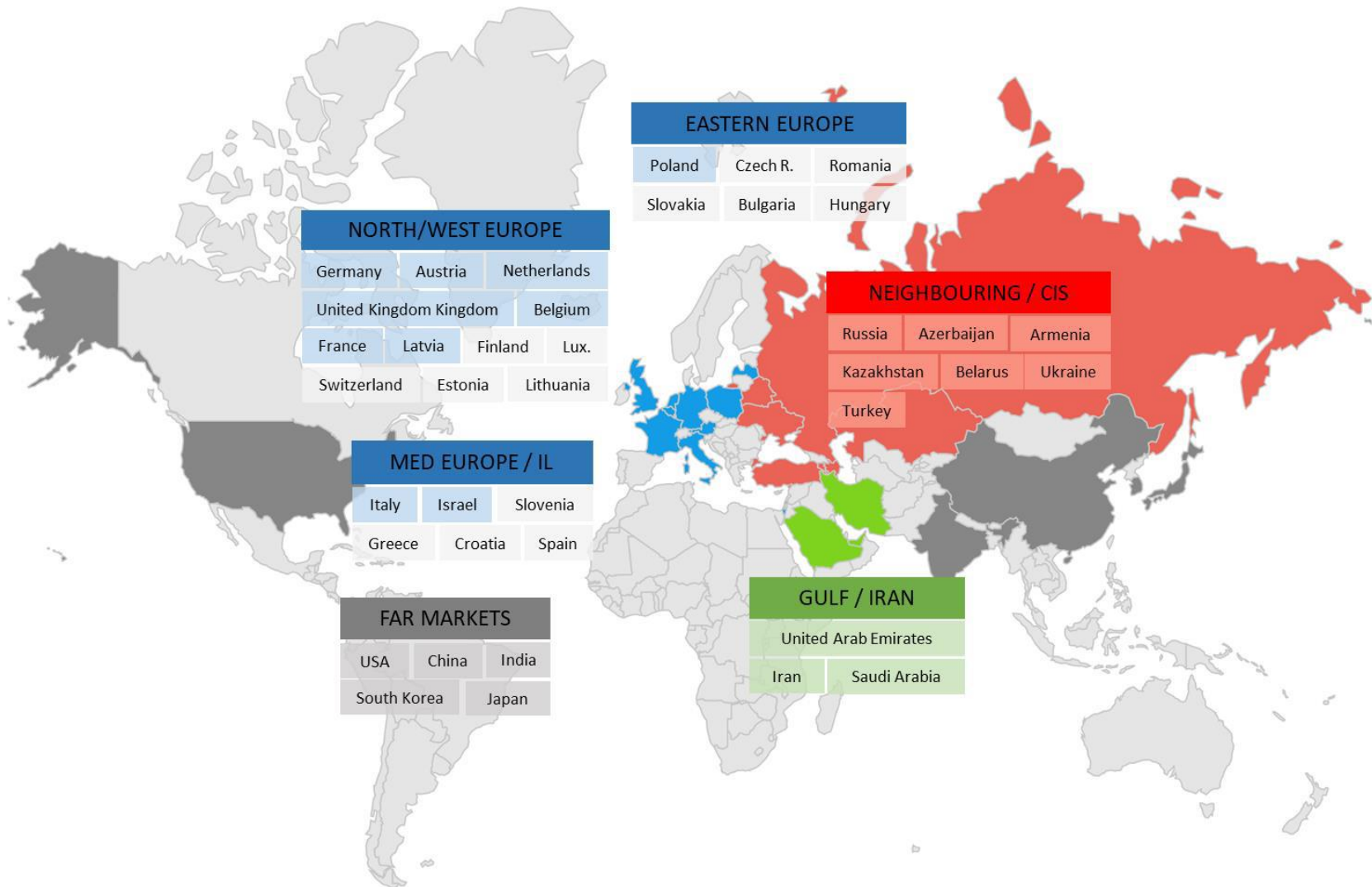
Georgia's Key Target Markets



Potential/combined markets

Switzerland, Slovenia, Czech Republic, Hungary, Slovakia, Croatia, Greece, Spain, Luxemburg, Lithuania, Estonia, Finland, Bulgaria, Romania

Georgia's Key Target Markets



Marketing and Promotion of inter-country tourism initiatives

- Silk Road
- Relations between the private sector
- Joint press tours
- Joint expo
- Collaboration with airlines to bring joint tours

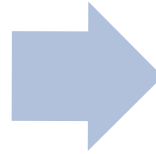
Role of CAREC Challenges

- Silk Road as a Brand
- Website with joint tourist products
- Conference that will allow private companies to meet and discuss mutual projects

Role of CAREC Challenge in Marketing

Seasonal Marketing Campaign

- Winter Marketing Campaign;
- Summer Marketing Campaign



Product Oriented Marketing Campaign

- Nature and Adventure; (Caucasus adventure)
- Cultural Heritage;
- Wine and Cuisine;
- Health and Wellness;
- Sun and Sea;
- MICE;
- City Breaks.

Too Broad Product: Caucasus adventure includes ski activities

Caucasus adventure (mountains) includes hiking and trekking; mountain climbing (Mount Kazbegi, Mount Ushba, Mt Tetnuldi etc); rock climbing; paragliding; free-riding (off piste skiing; heli-skiing) skiing; mountain biking; 4x4 driving; white-water rafting; horse-back riding.

Ski resorts have a great potential in Georgian tourism market. There are four main ski resorts (Bakuriani, Gudauri, Mestia, Goderdzi) with large amount of investment made in recent years.

- Should it be the part of Caucasus Adventure product?
- Would it be better to position ski resorts as separate product, because of unique characteristics of the segment?

Role of CAREC Challenge in Marketing

Products



Target
Markets by
Products

Lack of information about characteristics of outbound markets:

There are several source to find out characteristics of concrete market:

- UNWTO reports about outbound tourism;
- WTTC reports;
- International visitor Survey;
- Reports from officials of the country;
- Euromonitor International;
- Different internet resources (blogs, articles, ect).

Information scarcity is an important problem for most countries. Complete information is available for only main markets like China, GULF countries, European Countries, ect.

- Are there any information sources except listed above that can be used for marketing purposes?
- Should GNTA make any additional own research to learn more about the characteristics of the markets of interest?



Thank you!

www.georgla.travel  [www.fb.com/GeorglaAndTravel](https://www.facebook.com/GeorglaAndTravel)