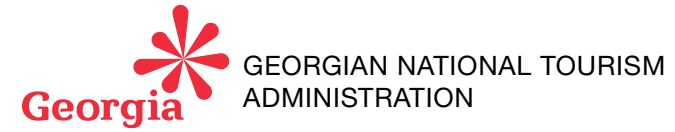
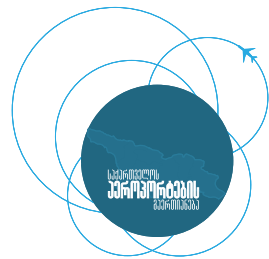




MINISTRY OF ECONOMY AND
SUSTAINABLE DEVELOPMENT
OF GEORGIA



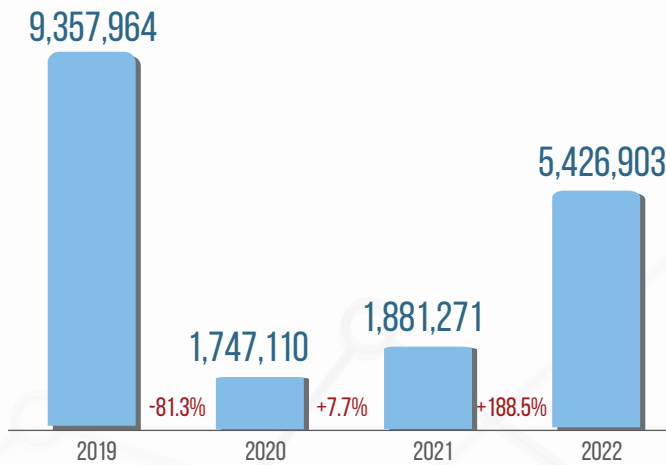
TOURISM AND AVIATION INDUSTRY OVERVIEW



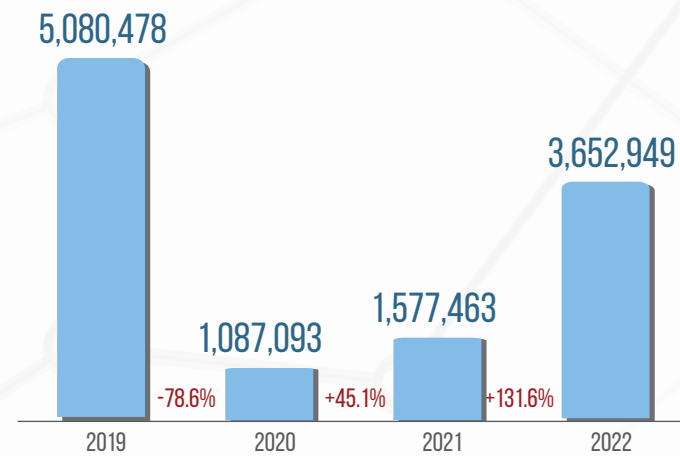


GEORGIAN TOURISM IN FIGURES 2022

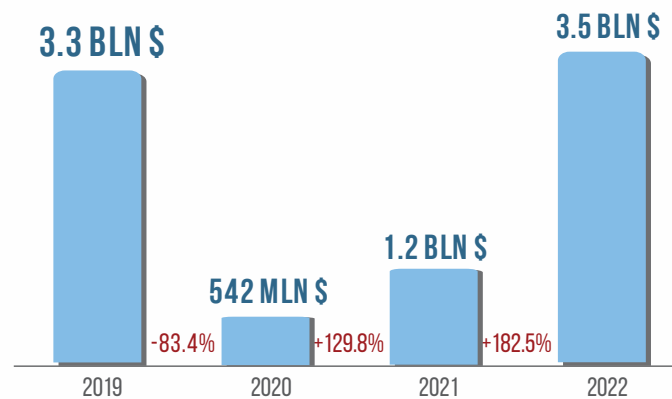
NUMBER OF INTERNATIONAL TRAVELER TRIPS
RECOVERY TO 2019 – 58%



INTERNATIONAL TOURISM VISITS
RECOVERY TO 2019 – 71.9%



INTERNATIONAL TOURISM RECEIPTS -
8% GROWTH



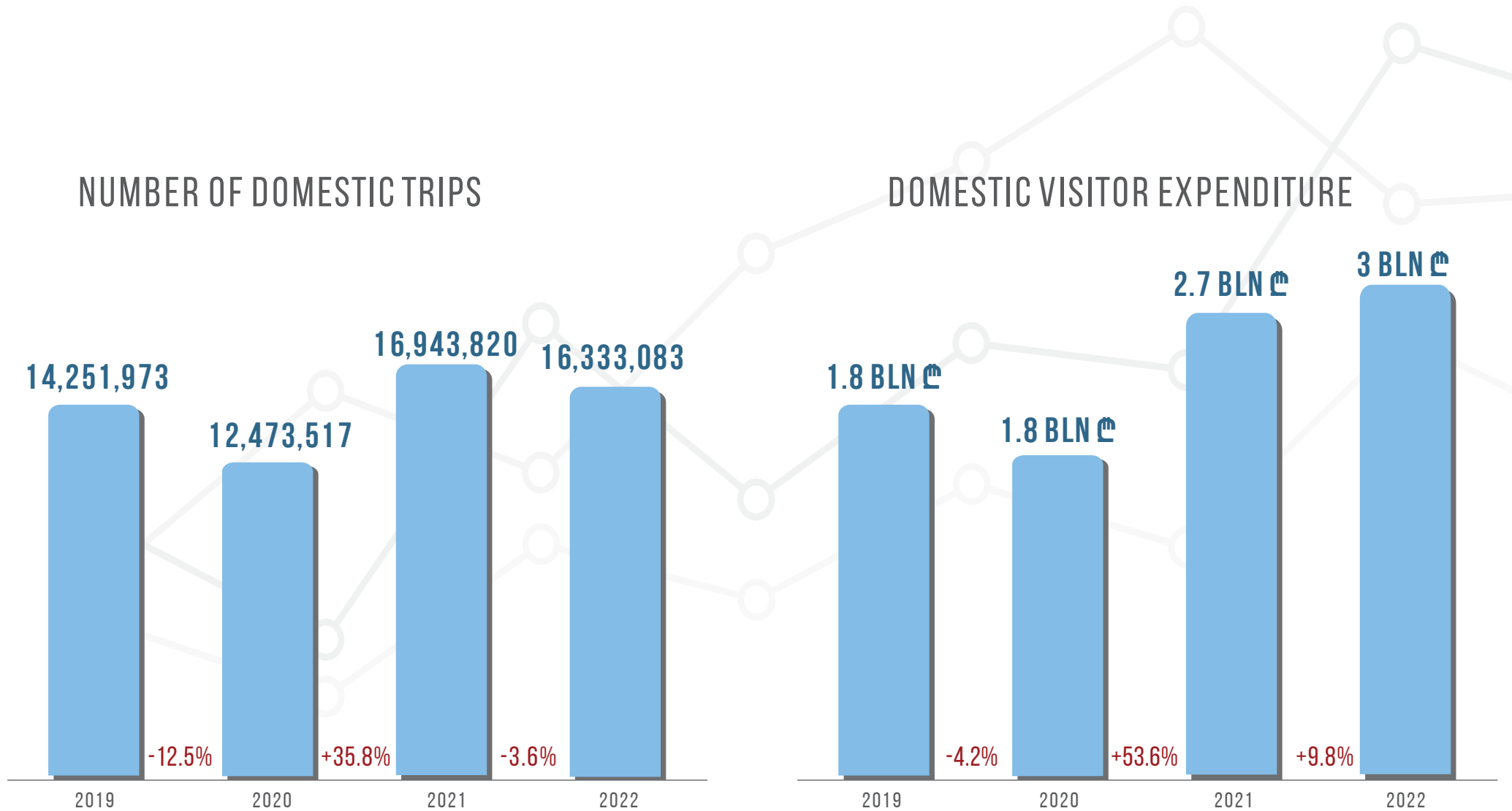


INTERNATIONAL VISITOR TRIPS- TOP15

COUNTRY	2019	2021	2022	% CHANGE 2019/2022	% CHANGE 2021/2022
RUSSIA	1,471,558	212,979	1,087,257	-26.1%	410.5%
TURKEY	1,156,513	326,494	925,561	-20.0%	183.5%
ARMENIA	1,365,048	164,698	742,593	-45.6%	350.9%
ISRAEL	205,051	100,686	210,178	2.5%	108.7%
UKRAINE	207,667	144,901	168,915	-18.7%	16.6%
AZERBAIJAN	1,526,619	82,718	152,969	-90.0%	84.9%
BELARUS	66,174	53,698	130,046	96.5%	142.2%
KAZAKHSTAN	103,611	66,787	120,494	16.3%	80.4%
SAUDI ARABIA	75,155	63,437	119,921	59.6%	89.0%
IRAN	141,997	18,549	102,877	-27.5%	454.6%
INDIA	54,606	24,992	52,841	-3.2%	111.4%
GERMANY	89,051	21,194	48,548	-45.5%	129.1%
UZBEKISTAN	16,785	36,384	47,953	185.7%	31.8%
POLAND	88,300	30,988	41,917	-52.5%	35.3%
UNITED STATES OF AMERICA	46,558	19,470	35,319	-24.1%	81.4%



DOMESTIC TOURISM IN FIGURES





GEORGIA AVIATION OVERVIEW

RECOVERY IN 2022 VS. 2019



87% flight frequencies recovered



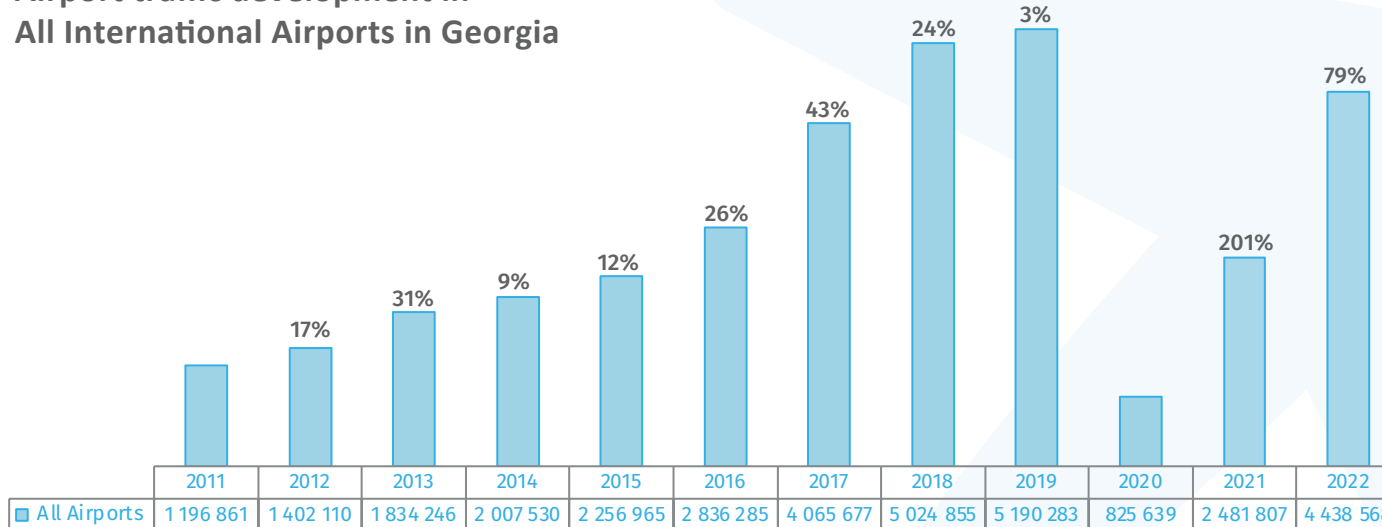
86% pax volume recovered

In 2022 4 new airlines – Condor, flyadeal, Air Moldova and Thai Air Asia X entered Georgian market.

7 new European and 1 new Asian Routes from Georgian international airports in 2022: Tbilisi – Stuttgart, Frankfurt, Cisinau, Bangkok; Kutaisi – Paris, Rome, Tallin; Batumi – Riga



Airport traffic development in All International Airports in Georgia

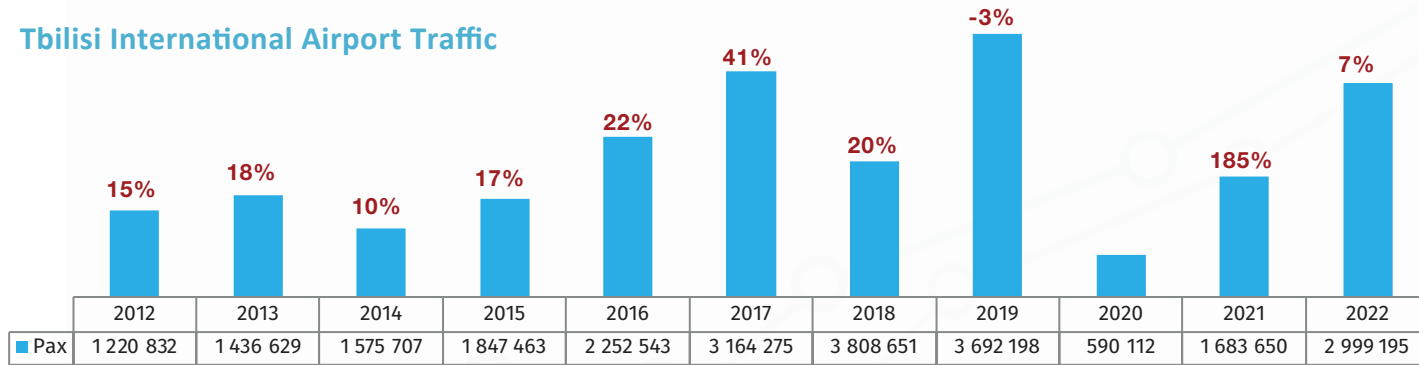


In 2019 number of visitors – 6,665,225; In 2022 Jan-Aug period number of visitors – 3,256,370.
In 2022 Jan-Aug period 54% of visitors have used land border.

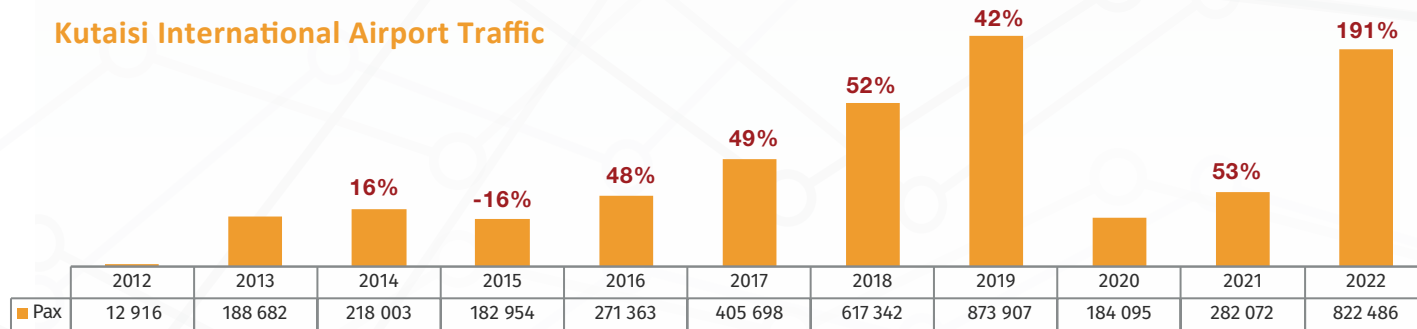


GEORGIA AVIATION OVERVIEW

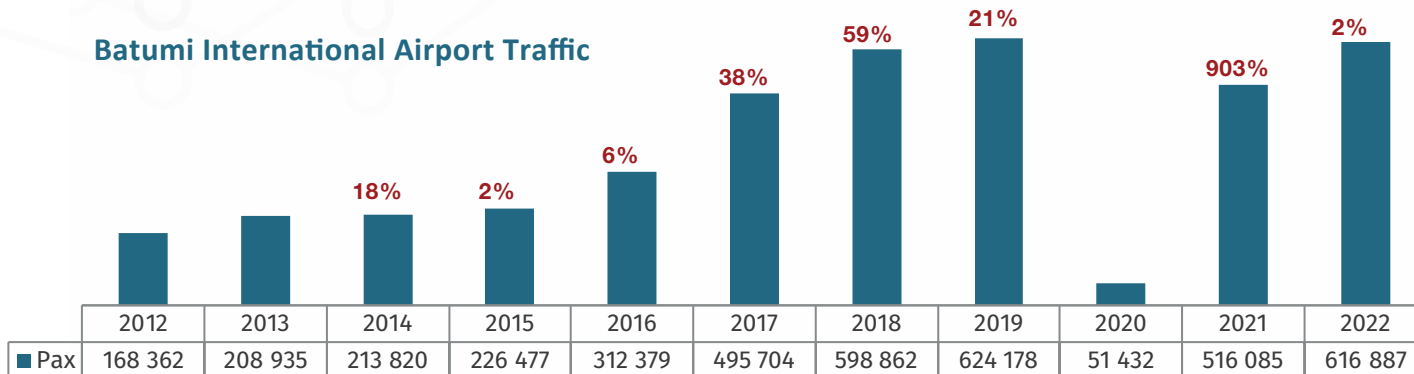
Tbilisi International Airport Traffic



Kutaisi International Airport Traffic



Batumi International Airport Traffic



TBILISI RECOVERY IN 2022 VS. 2019



81% flight frequencies recovered



81% pax volume recovered

KUTAISI RECOVERY IN 2022 VS. 2019



112% flight frequencies recovered



94% pax volume recovered

BATUMI RECOVERY IN 2022 VS. 2019



101% flight frequencies recovered



99% pax volume recovered



LARGE-SCALE PROJECTS:

ITB BERLIN 2023 – HOST COUNTRY



**MARCH 6: OPENING CEREMONY & VIP DINNER
UP TO 3000 GUESTS**



MARCH 7-9: EXHIBITION: UP TO 80 GEORGIAN COMPANIES

GEORGIAN STAND



**SOUTH ENTRANCE
MESSE BERLIN**



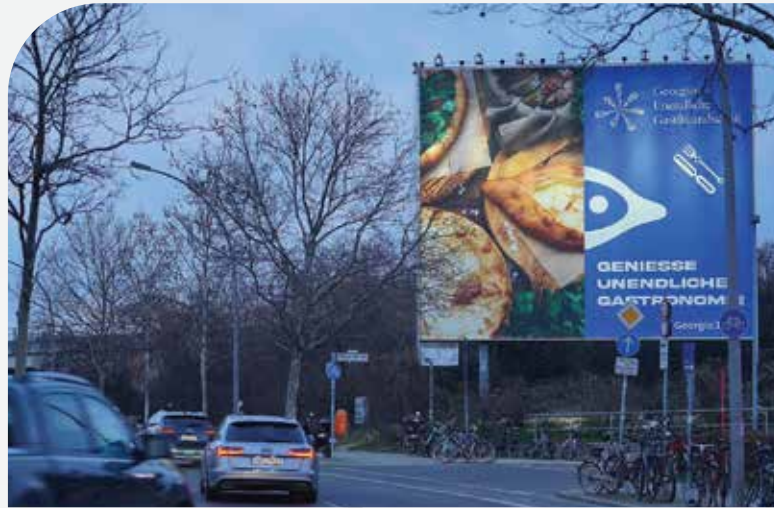
ADVENTURE HALL



ITB MICE HUB



COUNTRY BRANDING:



Deborah Rothe, the Exhibition Director of ITB Berlin.

DEBORAH ROTHE — THE EXHIBITION DIRECTOR OF ITB BERLIN:
„WE COULD NOT HAVE CHOSEN A BETTER PARTNER,
THE ENTIRE WORLD HAS MET GEORGIA”.

BAKURIANI 2023 FIS WORLD CHAMPIONSHIP



FEBRUARY 18 – MARCH 5



WINTER VILLAGE (CATERING FACILITIES, BUYING AND SELLING OF GEORGIAN PRODUCTS, ENTERTAINMENT PROGRAMS)

- 2500 athletes / team members / guests
- 2 locations (Didveli, Kokhta)
- 30 competitions
- 6 disciplines: Freestyle / Freeski Park&Pipe / Ski Cross / Snowboard Cross / Snowboard Alpine / Snowboard Park&Pipe



IMPLEMENTED PROJECTS

- 3 new Ski Lifts
- Artificial Snowmaking system Didveli and Kokhta-Mitarbi
- 2 water reservoirs (artificial lakes) for artificial Snowmaking System

270 MLN GEL



PLANNED ACTIVITIES:

M&I GEORGIA

- UP TO 60 LEADING TOUR OPERATORS
- PROMOTING OF PRIVATE AND BUSINESS TOURISM DEVELOPMENT



- UNWTO WORLD FORUM ON GASTRONOMY TOURISM (2024)
- COUNTRY BRANDING
- TOURISM LAW



DOMESTIC TOURISM AND PRODUCT DEVELOPMENT:

- „GEMO FEST“ – 3 REGIONS 
- MOUNTAIN HIKING TRAILS – 150 KM – IMERETI, MTSKHETA-MTIANETI, SAMEGRELO-ZEMO SVANETI, RACHA-LECHKHUMI, KVEMO SVANETI

**IMPROVEMENT OF SERVICE QUALITY - UP TO 2,000 RETRAINED
NEW RESEARCHES AND REPORTING SYSTEM (MASTERCARD, VISA, IN COOPERATION)
NEW TOURISM DESTINATIONS (RDA)**

- 33 RESORTS OF GEORGIA
- PROJECT RESEARCH AND INVESTMENT PROPOSALS

**DIGITALIZATION OF TOURISM PRODUCT AND DEVELOPMENT
OF INNOVATIVE SERVICES**





INTERNATIONAL MARKETING

2023 BUDGET (MARKETING+ITB) – 27 MLN GEL

COMMUNICATION STRATEGY

- HIGHLY RATED/LEADING PLATFORMS
- INVOLVEMENT OF TOP INFLUENCERS

NETFLIX **HBO** **CNN** **Bloomberg** **Expedia**

POSITIONING OF GEORGIA WITH SPECIFIC OFFERS

NEW PRODUCTS

- WEDDING/WELLNESS/MEDICAL TOURISM

OTHER PRODUCTS

- WINE/ GASTRO/ ECO/ ADVENTURE TOURISM

• 12 INTERNATIONAL TOURISM EXHIBITIONS

• INTEGRATED MARKETING CAMPAIGNS: TV, RADIO, PRINTED, OUTDOOR AND DIGITAL ADVERTISEMENT

• HOSTING UP TO 1000 TOP INTERNATIONAL JOURNALISTS AND BLOGGERS IN GEORGIA

New York Times "A Cheapskate's Cheatsheet to Tbilisi, Georgia"



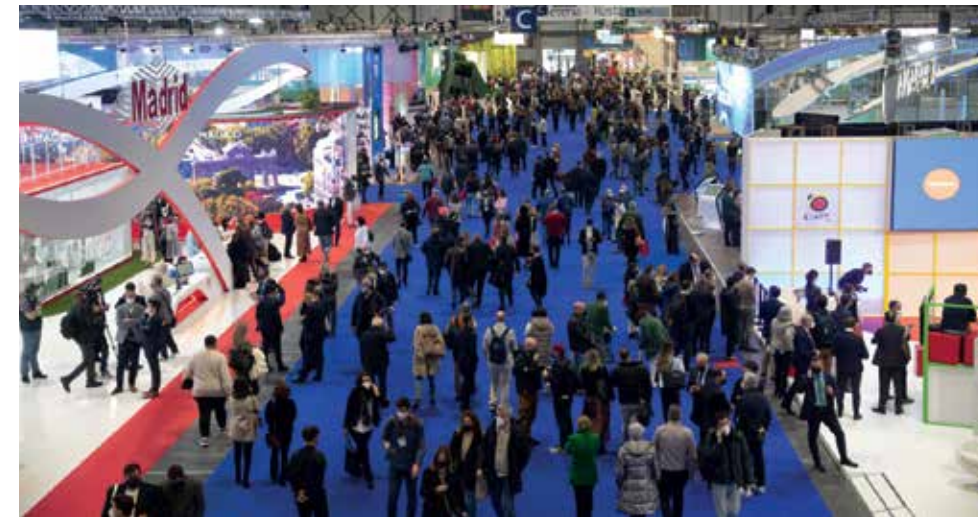
It seems that everyone from the country of Georgia, you can hardly question it without people piping up to say how startlingly beautiful the Caucasus mountains are, or how about those grilled over grapevines, the generous use of walnuts and pomegranates, or occasionally fermented Maibapuri, fresh hunkid (baked bread with a raw egg on top. But what they may have not known is how cheap it is – especially true since the last percent of its value since last summer.

Forbes: Why Georgia is Equally Perfect For a Vacation Or Long-Term Remote Work

By GEORGIA TODAY — October 22, 2021 in Highlights, Social & Society
Reading Time: 3 mins read



Forbes published an [article](#) about Georgia's tourism potential, written by contributor Riana Good, explaining why the country is equally perfect for a vacation or long-term remote work.





TARGET COUNTRIES

EUROPEAN MARKETS/ISRAEL

- ✈ GERMANY
- ✈ POLAND
- ✈ AUSTRIA
- ✈ UNITED KINGDOM
- ✈ FRANCE
- ✈ ITALY
- ✈ NETHERLANDS
- ✈ BALTIC COUNTRIES
- ✈ NORDIC COUNTRIES
- ✈ ISRAEL

GULF MARKETS

- ✈ SAUDI ARABIA
- ✈ UNITED ARAB EMIRATES

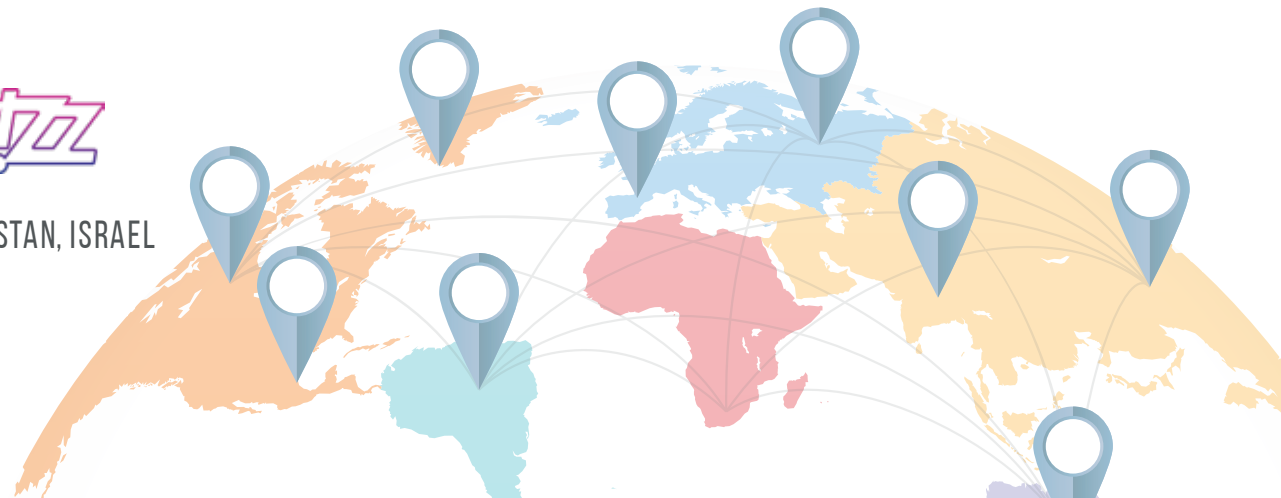
SECONDARY MARKETS

- USA
- ✈ CHINA
- JAPAN
- INDIA
- SOUTH KOREA

WIZZAIR'S THIRD BASE IN KUTAISI – MAY, 2023
BRUSSELS – MADRID, FRANKFURT- HAMBURG-POZNAN



NEW FLIGHT DIRECTIONS FROM KUTAISI: AZERBAIJAN, UZBEKISTAN, ISRAEL





FORECAST INDICATORS OF 2023

		2022	2023
INTERNATIONAL TRAVELER TRIPS	NUMBER	5,426,903	6,557,257
	RECOVERY	58.0%	70.1%
TOURIST TRIPS	NUMBER	3,652,949	4,287,229
	RECOVERY	71.9%	84.4%
AVERAGE LENGTH OF STAY	(NIGHTS)	6.6	6.8
AVERAGE EXPENDITURE VISIT	(USD)	648.0	670.6
INTERNATIONAL TRAVEL RECEIPTS	NUMBER	3,516,634,479	4,397,525,494
	RECOVERY	107.6%	134.5%



MINISTRY OF ECONOMY AND
SUSTAINABLE DEVELOPMENT
OF GEORGIA



GEORGIAN NATIONAL TOURISM
ADMINISTRATION

THANK YOU FOR YOUR ATTENTION

