

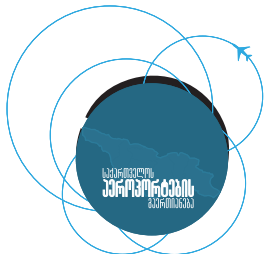


MINISTRY OF ECONOMY
AND SUSTAINABLE DEVELOPMENT
OF GEORGIA



GEORGIAN NATIONAL TOURISM
ADMINISTRATION

TOURISM AND AVIATION INDUSTRY OVERVIEW



საქართველოს სამოქალაქო ავიაციის სააგენტო
Georgian Civil Aviation Agency



Georgia

**We recommend to
grant **candidate
status****





HIGHLIGHTS OF THE YEAR



GEORGIA HOST COUNTRY OF ITB BERLIN 2023



BAKURIANI 2023 FIS WORLD SKI CHAMPIONSHIP



GEORGIA IN WORLD CUP CALENDAR



FREERIDE WORLD TOUR IN SVANETI



WORLD TOURISM DAY 2024



11 NEW ROUTES



**1 MILLION PASSENGERS IN KUTAISI
INTERNATIONAL AIRPORT**





GEORGIAN TOURISM IN FIGURES 2023 I-III Q



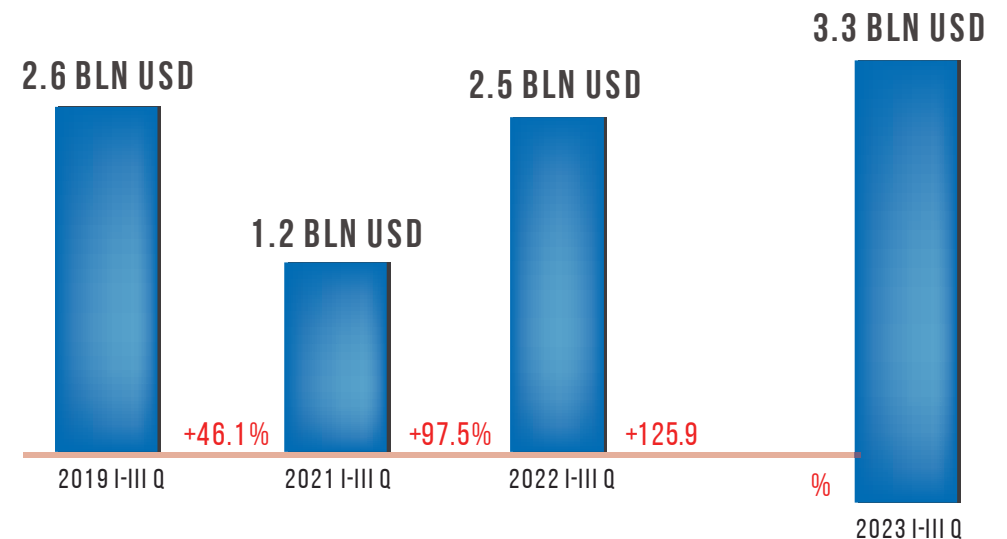
INTERNATIONAL TRAVELER TRIPS - 5,566,980
RECOVERY TO 2019 – 76.9%



INTERNATIONAL TOURIST VISITS - 3,655,576
RECOVERY TO 2019 – 91.6%



INTERNATIONAL TOURISM RECEIPTS
GROWTH TO 2019 +25.9%



DOMESTIC VISITORS EXPENDITURE - 1.4 BLN GEL
GROWTH TO 2019: +98.5%
I-II Q

SOURCE: MINISTRY OF INTERNAL AFFAIRS OF GEORGIA
NATIONAL BANK OF GEORGIA



INTERNATIONAL VISITOR TRIPS TOP COUNTRIES

2023 I-III Q

COUNTRY	2019: I-III Q	2023: I-III Q	RECOVERY 2019/2023
RUSSIA	1,205,974	1,149,053	95.3%
TURKEY	907,350	1,081,419	119.2%
ARMENIA	993,144	736,086	74.1%
ISRAEL	150,997	182,651	121%
AZERBAIJAN	1,169,831	147,195	12.6%
KAZAKHSTAN	74,794	129,913	173.7%
UKRAINE	164,825	115,815	70.3%
BELARUS	56,098	109,178	194.6%
IRAN	109,102	98,679	90.4%
POLAND	69,924	73,129	104.6%
SAUDI ARABIA	69,074	63,676	92.2%
INDIA	39,995	59,258	148.2%
GERMANY	72,074	54,332	75.4%
UZBEKISTAN	12,908	39,949	309.5%
USA	36,966	36,472	98.7%
EU	385,497	328,909	85.3%
GULF	103,817	97,617	94%

SOURCE: INFORMATION CENTRE, INFORMATION AND ANALYTICAL DEPARTMENT, MINISTRY OF INTERNAL AFFAIRS OF GEORGIA

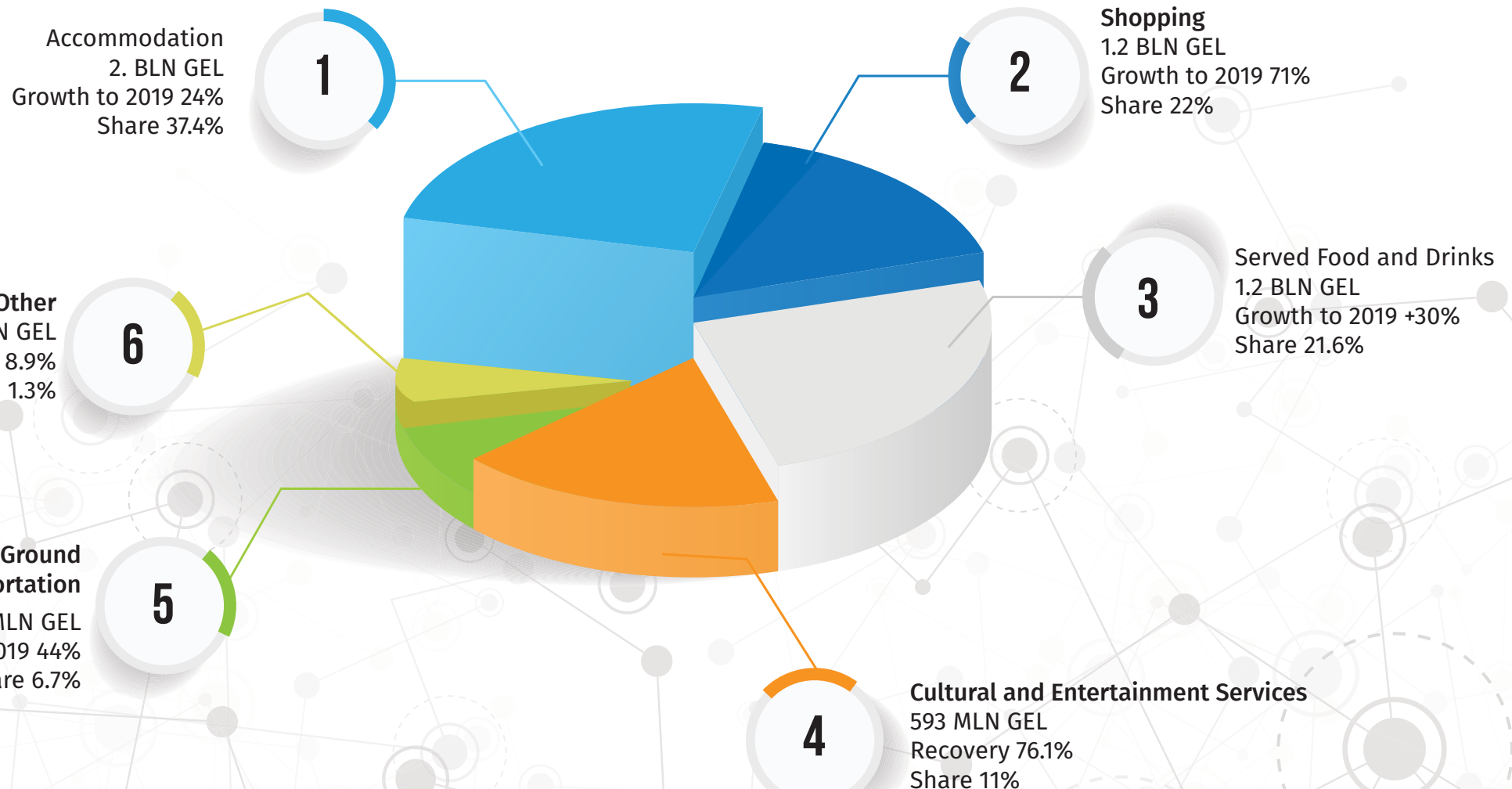


INTERNATIONAL VISITOR SURVEY

2023 I-II Q



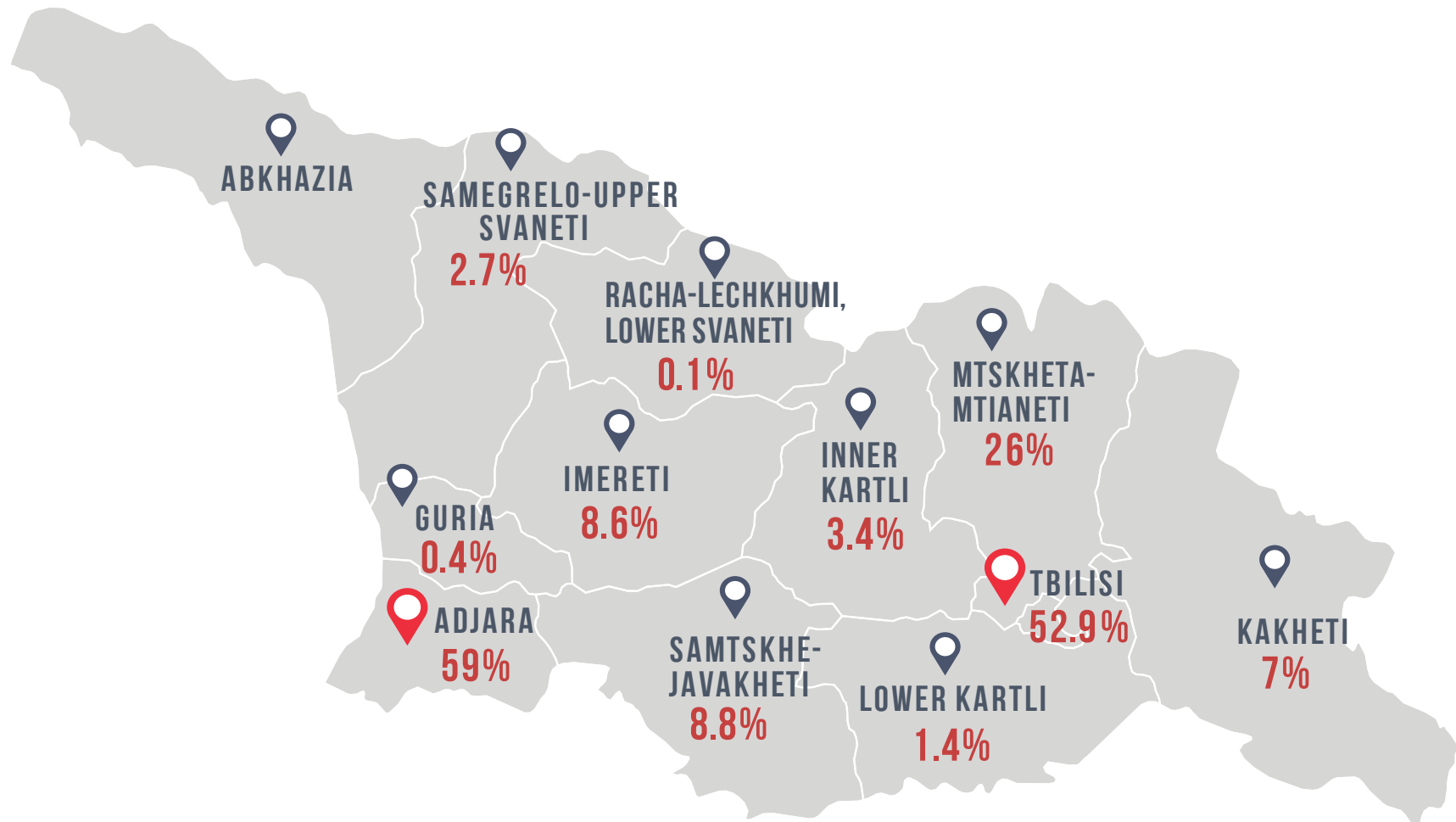
EXPENDITURE STRUCTURE





TOP REGIONS 2023 I-II Q

HOLIDAY, LEISURE, RECREATION



SOURCE: NATIONAL STATISTICAL OFFICE OF GEORGIA



ACCOMMODATION MARKET

HOTELS OPENED IN 2022-2023:



2,213

ACCOMMODATION
UNITS



97,834

NUMBER OF BEDS



170

ACCOMMODATION
UNITS



10,100

NUMBER OF BEDS



310

ACCOMMODATION
UNITS

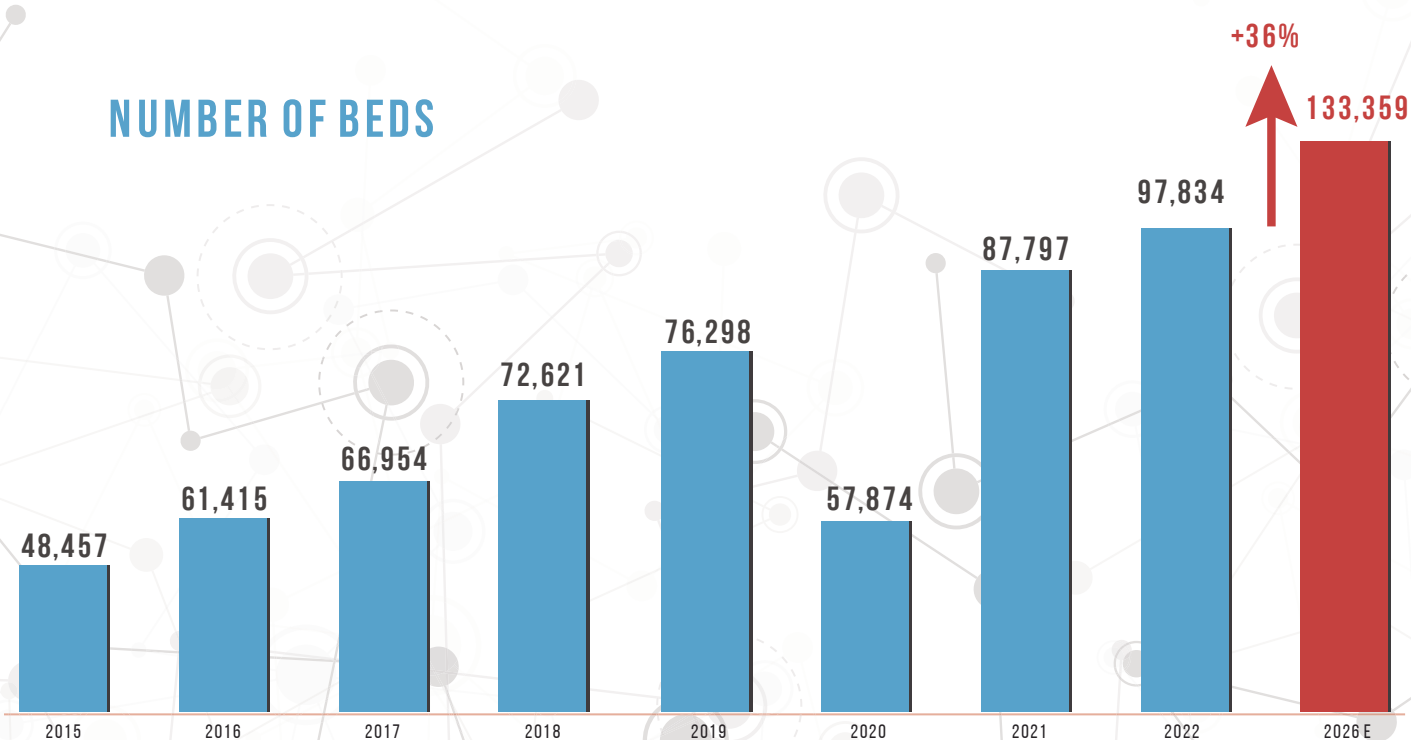


35,500

NUMBER OF BEDS

PLANNED AND ONGOING HOTELS 2023/2026:

NUMBER OF BEDS



SOURCE: NATIONAL STATISTICAL OFFICE OF GEORGIA



AVIATION INDUSTRY OVERVIEW



AIRPORT TRAFFIC DEVELOPMENT

2023 I-III Q

ALL INTERNATIONAL AIRPORTS IN GEORGIA

	2023	GROWTH TO 2019
DESTINATIONS	101	+20%
AIRLINES	53	+33%
FREQUENCY	560	+37%
PASSENGER TRAFFIC 01.01-30.09	4,529,466	+9%

11 NEW ROUTES

✈ TOP ROUTES:

- ✈ HAMBURG
- ✈ MADRID
- ✈ BRUSSELS
- ✈ POZNAN
- ✈ DELI

TOP 10 AIRLINES

WIZZ AIR HUNGARY	921,153
TURKISH AIRLINES	477,667
PEGASUS	318,898
AZERBAIJAN AIRLINES	233,334
GEORGIAN AIRWAYS	224,787
FLYDUBAI	167,318
EL AL	163,660
ISRAIR	154,061
BELAVIA	155,147
AIR ARABIA	121,202

KUTAIISI INTERNATIONAL AIRPORT RECORDED
1 MILLION PASSENGERS



SunExpress

IndiGo ✈



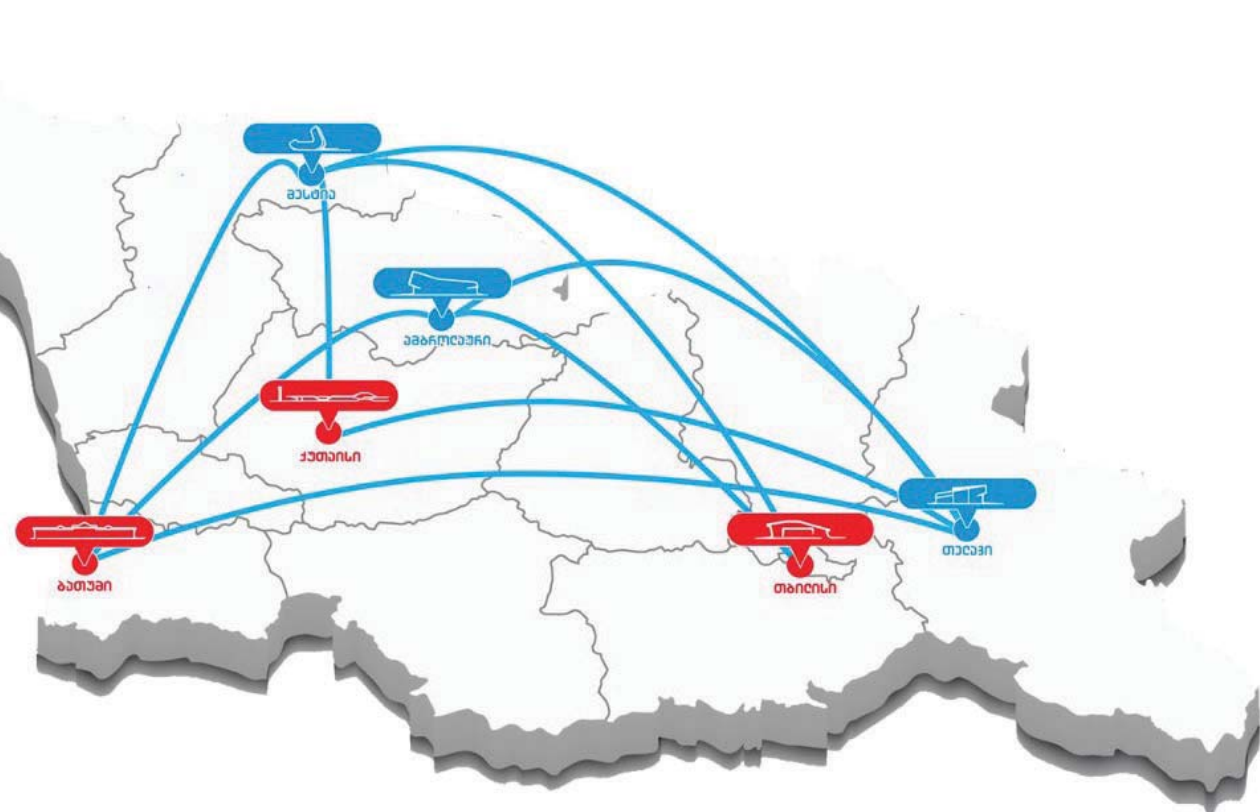
DOMESTIC AIR TRAVEL MARKET I-III Q

3 DOMESTIC AIRPORTS

5 ROUTES

25,196 PASSENGERS SERVED

RECOVERY TO 2019 83%



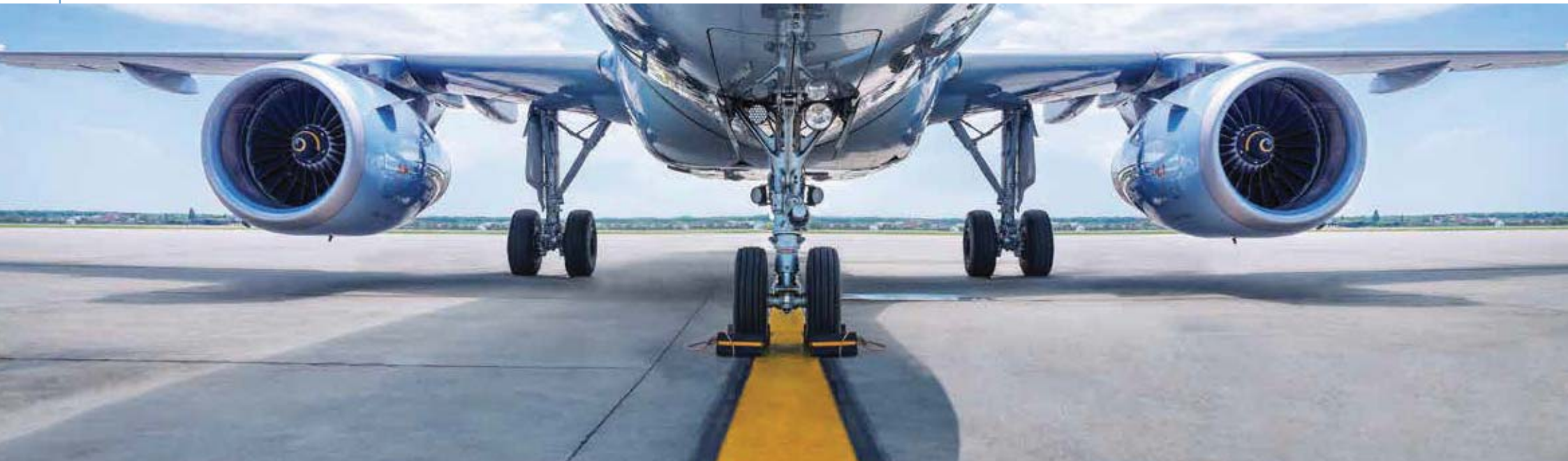


PLANNED ACTIVITIES AND PROJECTS



CONSTRUCTION PROJECTS IN AVIATION INDUSTRY

- **NEW AIRPORT IN TBILISI**
- **CONSTRUCTION OF A NEW AIRPORT IN TELAVI**
- **A NEW 3.5-KILOMETER RUNWAY AT THE KUTAISI INTERNATIONAL AIRPORT**
- **TERMINAL CONSTRUCTION OF THE MESTIA AIRPORT**



SKI RESORT PROJECTS

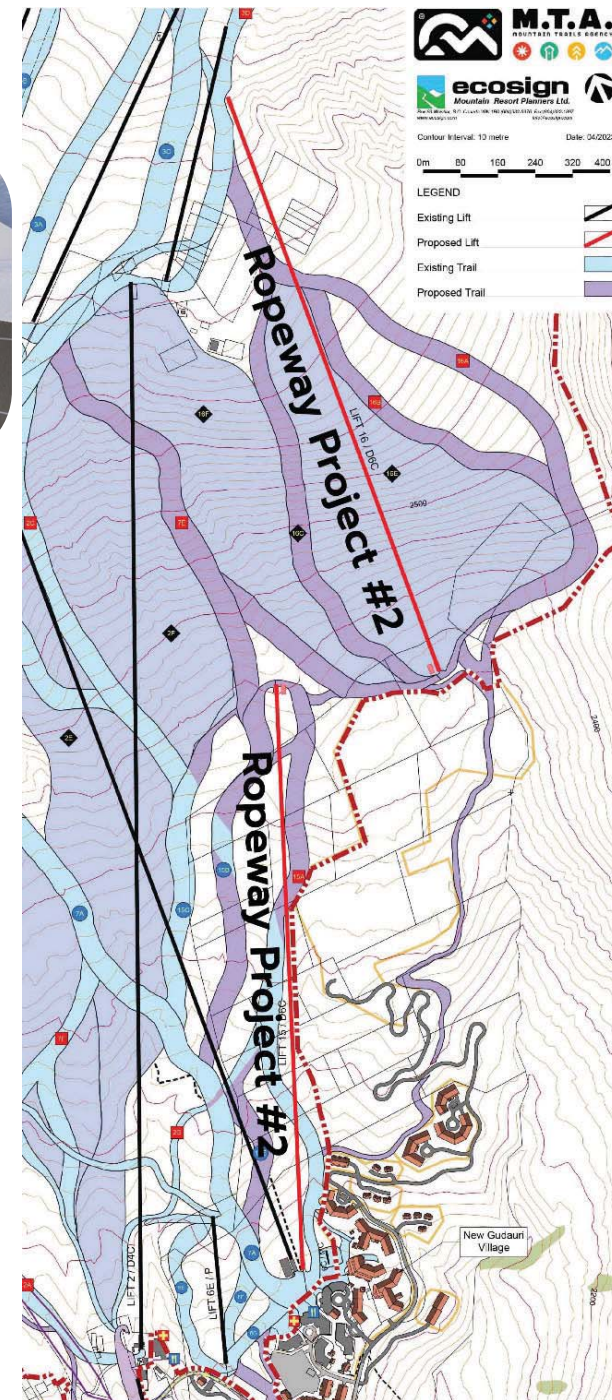
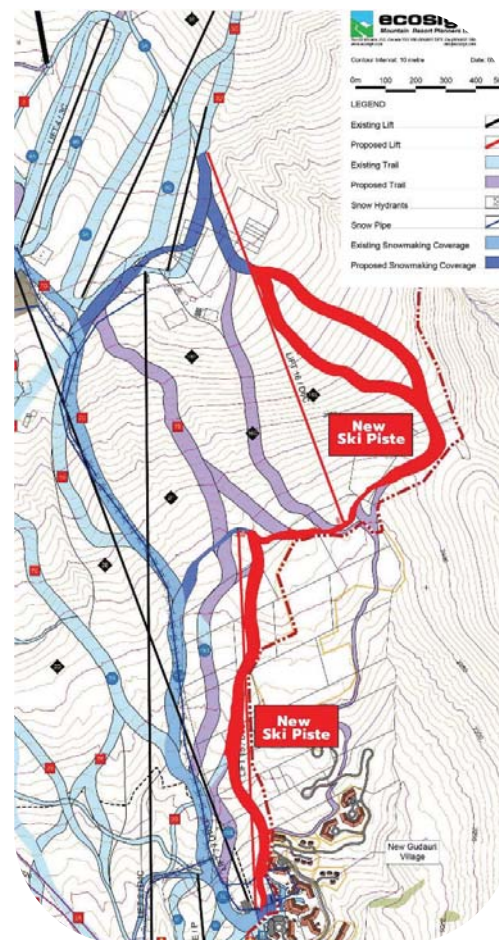
TWO NEW ROPEWAY PROJECTS IN NEW GUDAURI

- SIX SEATER (BUBBLE) CHAIRLIFTS
- CHAIRLIFT CAPACITY 1,800 – 2,400 PASSENGERS/HOUR
- LENGTH OF ROPEWAYS

- ROPEWAY PROJECT #1- 1,249 M
- ROPEWAY PROJECT #2 - 1,369 M

4 NEW SLOPES IN GUDAURI -
8 KM LENGTH

2 NEW SLOPES IN MESTIA, HATSVALI -
5 KM LENGTH





LARGE-SCALE EVENTS CALENDAR

- **WORLD CUP EVENTS**



2023 MOGULS (BAKURIANI)

2024 SNOWBOARD CROSS (GUDAURI)
SKI CROSS (BAKURIANI)

- **FREERIDE WORLD TOUR (FWT) WEEK 2024 –
TETNULDI, SVANETI**



- **HOSTING M&I FORUM**
30 JUNE-4 JULY 2024



- **HOSTING THE WORLD TOURISM DAY**
27 SEPTEMBER 2024





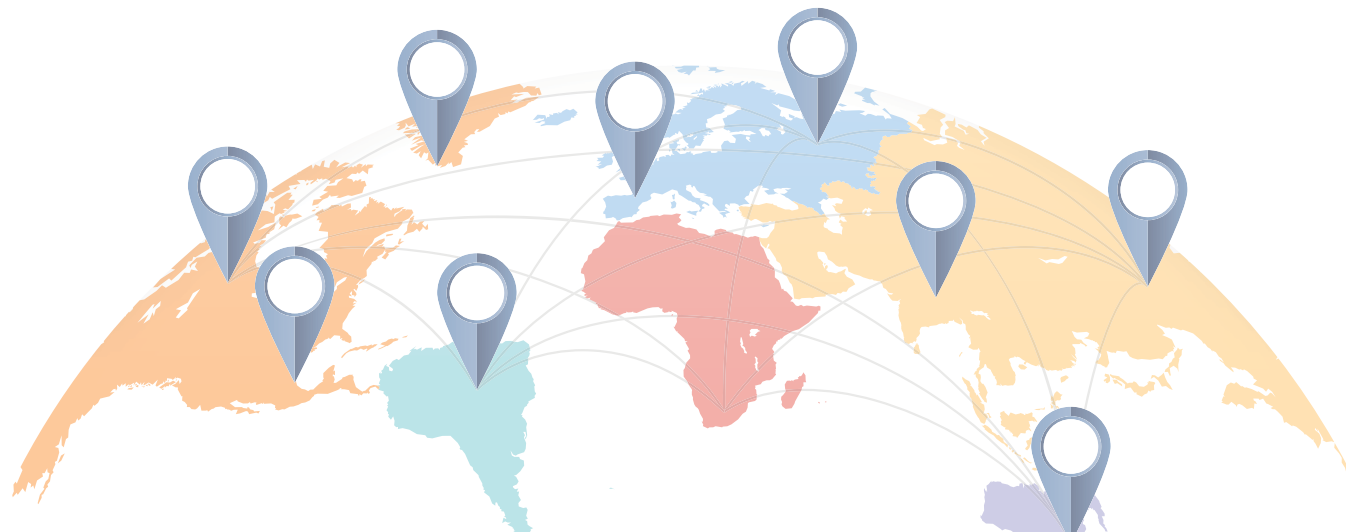
TARGET COUNTRIES

PRIMARY MARKETS

- ✈ GERMANY
- ✈ POLAND
- ✈ AUSTRIA
- ✈ FRANCE
- ✈ BALTIC COUNTRIES
- ✈ GULF COUNTRIES
- ✈ CHINA
- ✈ INDIA
- ✈ KAZAKHSTAN
- ✈ UZBEKISTAN

OTHER STRATEGIC MARKETS

- ✈ UK
- ✈ ITALY
- ✈ NETHERLANDS
- NORDIC COUNTRIES
- USA
- JAPAN
- SOUTH KOREA



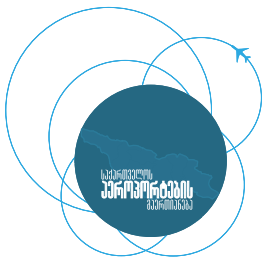


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THANK YOU



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Georgian Civil Aviation Agency