-39%/₂₀₁₉

The USAID Economic Security Program

TOURISM

GENERAL TOURISM TRENDS IN 2022



Throughout 2022 significant positive developments were present in tourism sector, which recovered to and even exceeded the major tourism sector indicators. However, apart from positive dynamics in the tourism sector, some challenges were also observed.

2022: Trends that have short-and long-term effects on Georgian tourism sector

+62%/2019

 Rapid and large-scale entry of foreign citizens from Russia, Ukraine, and Belarus into Georgia;

+15%/2019

- Safety concerns on traveling to Georgia by international visitors due to the political situation in the region;
- Migrants offering tourism services to visitors from CIS countries, disrupting the characteristics of international visitors;
- Disruptions in the structure of the primary purpose of international visits by shift to VFR (visiting friends and relatives) purpose of visit.
- Changes in domestic tourism patterns by integration of migrants into domestic tourism;
- Changes in characteristics of visitors from the Gulf States by shifting to family travel;
- Disruption of the inflow of visitors from Azerbaijan due to land border closure;
- Labor force issues in the hospitality industry
- Increase in the input prices.

ACCOMMODATION VALUE CHAIN

+8%/2019

Indirect Economic Impact	From Country Origin To Georgia		In and Around Georgia			
	Supplies	Supplies	Supplies	Supplies	Supplies	Supplies
	•	•	•	•	•	•
	Travel agencies and reservation services Tourism Internal Expenditure: 27 mln GEL	Transportation Tourism Internal Expenditure: 1.5 bln GEL	Accommodation Tourism Internal expenditure: 2.1 bln GEL	Food and Beverage Tourism Internal Expenditure: 1.8 bln GEL	Cultural, Sport, Recreational Services Tourism Internal Expenditure: 1.6 bln GEL	Connected product Tourism Internal Expenditure: 1.6 bln GEL
Direct Economic Impact	Travel Agency, Tour Operator	Road Transport	Hotels	Restaurant, Cafes	Visitor Attractions	Shopping
	Reservation Services	Railway Transport	Guesthouse B&B, Youth Hostel	Bars, Night Clubs	Shows and Events	Food Outside Restaurants
		Air Transport	Rented Apartments	Fast Food	Sport Activities	
ect Ec		Water Transport				
Ö		Transport Rental Services				

ACCOMMODATION VALUE CHAIN

+23%/2019

+15%/2019

+9%/2019

+4%/2019

Turnover Employment Salary **Productivity GEL** 1,056 1,224 17,226 71 **GEL** MLN +49%/2021 +15%/2021 +27%/2021 +29%/2021 -37%/2019 +5%/2019 +34%/2019 +30%/2019

FOOD SERVICE VALUE CHAIN





