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## STATISTICAL STUDY OF PRIORITY DIRECTIONS AND EXPECTATIONS OF DOMESTIC TOURISM REHABILITATION IN GEORGIA

*After recovering from two years of economic uncertainty and shock, the development of tourism in Georgia returned to the pre-pandemic situation. There is a growing trend in the movement of tourist flows, the activation of companies operating in the domestic tourist marketIt's on the face.*

**Methodology.** Both general and specific statistical methods were used in the research process: observation, gathering-grouping and analysis: average values, relative indicators, variational analysis, dynamic series, selective observation, etc. The data was processed and the indicators were calculated based on the computer program SPSS

**Results.** Domestic tourism is gaining strength in the country, the number of people wishing to travel domestically has increased, the attitude of the population toward travel has changed. In particular, the 31-50-year-old category always prevails among domestic visitors. It is noteworthy that the activity of the population aged 15-30 years slows down and the domestic tourism activity of visitors aged 71+ increases.

If, according to the researches of the National Statistics Service, Georgian citizens travel mainly to visit friends/relatives and then to visit their second home, then according to the results of the research conducted by us, the purpose of domestic visits is mainly recreation, entertainment, visiting friends/relatives. The most active for tourism are: Tbilisi, Adjara and Imereti. The average number of nights spent by visitors is increasing. Family/relatives predominate among accompanying persons on internal visits, although the number of those wishing to travel alone is also increasing; Popular accommodation options include hotels and home-rental services. The average monthly volume of expenses incurred during domestic travel is also increasing. The structure of tourism expenses has changed.. According to the results of the research, mountain tourism, sea

tourism, eco, and agro-tourism are the most prioritized among tourism products. According to the respondents, the locations of Svaneti, Adjara, Tusheti, Kazbegi, Fasanauri (for rafting), etc. are attractive.

**Keywords:** Tourism, Structure, Analysis, Trend, Location

**JEL classification:** C0

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## შიდა ტურიზმის რეაბილიტაციის პრიორიტეტული მიმართულებებისა და მოლოდინების სტატისტიკური კვლევა საქართველოში

ორწლიანი ეკონომიკური განუსაზღვრელობისა და შოკური მდგომარეობიდან თავის დაღწევის შემდეგ ტურიზმის განვითარება საქართველოში ნელ-ნელა უბრუნდება პანდემიამდე არსებულ მდგომარეობას. სახეზეა ტურისტული ნაკადების მოძრაობის მზარდი ტენდენცია, შიდა ტურისტულ ბაზარზე ოპერირებადი კომპანიების გააქტიურება

**მეთოდოლოგია.** კვლევის პროცესში გამოყენებულ იქნა როგორც ზოგადი (ანალიზის, სინთეზის, ინდუქციის, დედუქციის და სხვ.) ისე სპეციფიკური სტატისტიკური მეთოდები: დაკვირვების, თავმოყრა-დაჯგუფებისა და ანალიზის: საშალო სიდიდეების, შეფარდებითი მაჩვენებლების, დინამიკური მწკრივების, შერჩევითი დაკვირვების და სხვ. მეთოდები. მონაცემები დამუშავებულ და მაჩვენებლები გაანგარიშებულ იქნა კომპიუტერული პროგრამა SPSS-ის საფუძველზე. გაანგარიშებების შედეგად კროსტაბულური ანალიზიდან გამომდინარე განხორციელდა კვლევის შედეგების ფორმირება.

**შედეგები.** კროსტაბელური ანალიზით გაირკვა, რომ შიდა ტურიზმი ქვეყანაში ძალას იკრებს, განსაკუთრებით ახალგაზრდა ასაკის მოსახლეობაში გაზრდილია შიდა მოგზაურობის მსურველთა რაოდენობა. შეცვლილია მოსახლეობის განწყობა მოგზაურობასთან მიმართებაში. კერძოდ, შიდა ვიზიტორებს შორის მუდმივად ჭარბობს 31-50 წლის კატეგორია. ამ ასაკის მოგზაურთა წილი კიდევ უფრო გაიზარდა და 2021 წელს ამ კატეგორიის ადამიანების პროცენტული წილი ვიზიტორთა შორის 38.4 %-ს შეადგენს. საყურადღებოა 15-30 წლის მოსახლეობის აქტივობის შენელება და 71+ წლის ასაკობრივი კატეგორიის ვიზიტორების შიდა ტურისტული აქტივობის ზრდა.

თუ სტატისტიკის ეროვნული სამსახურის კვლევების მიხედვით, საქართველოს მოქალაქეები ძირითადად მეგობრების/ნათესავების მოსანახულებლად და შემდეგ მეორე სახლის მოსანახულებლად მიემგზავრებიან, მაშინ ჩვენს მიერ ჩატარებული კვლევის შედეგებით, შიდა ვიზიტების მიზანი ძირითადად დასვენება, გართობა, რეკრეაცია და შემდეგ მეგობრების/ნათესავების მონახულება. ტურისტულად ყველაზე აქტიურია: თბილისი, აჭარა და იმერეთი. იზრდება ვიზიტორების მიერ გატარებული ღამეების საშუალო რაოდენობა. შიდა ვიზიტებისას თანმხლებ პირებს შორის ჭარბობს ოჯახის წევრები/ნათესავები, თუმცა იზრდება მარტო მოგზაურობის მსურველთა რიცხვიც; განსახლების საშუალებებს შორის პოპულარულია სასტუმროები და დაქირავებული სახლები. იზრდება შიდა მოგზაურობის დროს გაწეული ხარჯების საშუალო თვიური მოცულობაც. შეიცვალა ტურისტული ხარჯების სტრუქტურა. ჩატარებული კვლევის შედეგებით რესპონდენტთა შორის ყველაზე დიდი პოპულარობით სარგებლობდა მთის ტურიზმი, მეორე პოზიციას იკავებდა საზღვაო ტურიზმი, ხოლო მომდევნო პოზიციაზე იყო ეკო და აგრო ტურიზმი. რესპონდენტების აზრით ყველაზე მეტად მიმზიდველია სვანეთი, აჭარის ლოკაციები, თუშეთი, ყაზბეგი, ვასანაური(ჯომარდობისთვის) და ა.შ.

**საკვანძო სიტყვები:** ტურიზმი, სტრუქტურა, ანალიზი, ტენდენცია, ლოკაცია

**JEL კლასიფიკაცია:** C0

## Introduction

Today, against the backdrop of the pandemic, the tourism rehabilitation process is underway in Georgia. After recovering from two years of economic uncertainty and shock, the tourism development in Georgia is slowly returning to the pre-pandemic situation. There is a growing trend in the movement of tourist flows, higher activity from companies operating in the domestic tourist market, and advertising campaigns in social networks offering diverse tourist packages and perfect service offerings. Of course, there are still risks associated with the spread of the virus, so it will be necessary to follow some regulations to certain extent. Therefore, the rehabilitation process will not be easy, either for domestic or for international tourism. In this regard, the levers for the development of domestic tourism are in the hands of the population itself, because the scale of the rehabilitation of domestic tourism depends a lot on their cautious behavior. Although, according to the data available today, international tourism has the highest rate of development in the overall tourism of Georgia, still the domestic tourism potential of the country is growing, and it needs to be used effectively. Moreover, the growth rates of the number of domestic tourist visits made before the pandemic and the number of domestic visitors in the recent period create positive expectations for tourism. One main promoting factor can be developing tourism destination management, including understanding importance of stakeholders and their cooperation. So it is important to estimate events in a tourism field, detect trends and determine statistical rules. (Abesadze N. K., 2019) his, surely, means the perfection of the activity of the National Statistics Office and its

maximum harmonization to international standards. (Quliyev, 2019)

Today, in the modern era of economic development, tourism is a very important source of development and economic growth. (Abesadze n. K., 2020) Expectations for the revival of domestic tourism can be multifaceted. Today we can safely say that one of its priority directions can even be considered medical tourism, which carries a certain niche for our country. The medical "secrets" of Georgia, the unique natural resources necessary for health, give medical tourism the opportunity to develop as a priority. Georgia is slowly becoming one of the primary destinations for medical and plastic surgery, cosmetic, dental healthcare, balneological reproductive services,

vision correction (excimer laser method); treatment of ischemic heart diseases (stenting, shunting); treatment with phages (an exclusive type, since the Tbilisi bacteriophage is one of the unique institutions in the world) and others. Along with medical tourism, Georgia also has a prospect in health and wellness tourism. It should be noted that there are about 2400 types of natural water sources in Georgia. Touristically, the level of awareness about them is still low. Sulfur waters; Sairme, Tskaltubo, Akhtala health procedures; Borjomi, Nabeglavi, Likani, Sno, Mukhuri "Lugela" (which is unique for its natural components) natural waters are just some of the examples of the touristic destinations with a massive potential. With the right approach and assessment, a diversity of high-quality tourist packages based on the use of natural resources can become one of the prerequisites for the rise of medical tourism in Georgia. There are 102 resorts and 182 resort places in the country. They can offer customers treatment, rehabilitation, and recovery for various diseases. It should be noted that Georgia has every type of medical resort that currently exists in the world, where natural healing factors - mineral water, mud, healing air and necessary conditions for their therapeutic and preventive purpose is present.

Besides medical tourism, other types of tourism, such as mountain, ecological, adventure, extreme, and marine, are becoming a priority and are in demand. Rafting has become a trend for young residents of Georgia. We can say that in the post-pandemic period, the interest of the population of Georgia towards domestic tourism has increased. Their views and attitude have changed, the desire to rest and the mood of the country's residents to get to know their country better has come to the fore. This has been confirmed by various studies and by the results of our research.

**Methodology**

In the research process, general (analysis, synthesis, induction, deduction, etc.), as well as specific (observation, gathering-grouping, analysis: average values, relative indicators, dynamic series, selective observation, etc.) statistical methods were used. The data was processed, and the indicators were calculated based on the computer program SPSS. As a result of the calculations, based on crosstab analysis, the research results were formed.

**Results**

Crosstab analysis revealed that domestic tourism is gaining strength in the country, especially among the younger population. The number of people willing to travel domestically has increased.

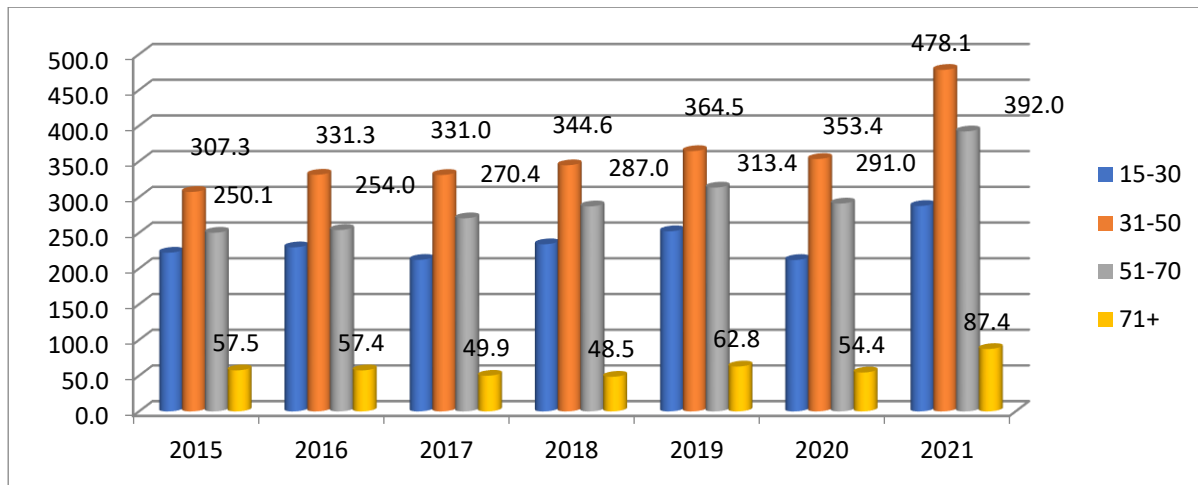
**Table 1.** Distribution of monthly average number of Georgian resident visitors of age 15 and older by place of residence, %.

	Tbilisi	Adjara A/R	Guria	Imereti, Racha-Lechkumi, Kvemo Svaneti	Kakheti	Mtskheta-Mtianeti	Samegrelo-Zemo Svaneti	Samtskhe-Javakheti	Kvemo Kartli	Shida Kartli
<b>2015</b>	26.7%	9.3%	2.9%	21.1%	8.3%	2.1%	9.5%	5.3%	7.7%	7.1%
<b>2016</b>	30.4%	8.8%	3.1%	19.7%	7.1%	2.6%	8.5%	3.5%	8.8%	7.5%
<b>2017</b>	27.4%	10.1%	2.6%	19.7%	6.8%	2.9%	8.5%	4.0%	9.4%	8.5%
<b>2018</b>	26.4%	11.1%	2.8%	18.6%	7.7%	3.7%	8.1%	3.5%	10.0%	8.2%
<b>2019</b>	29.9%	11.9%	2.7%	16.8%	6.2%	3.6%	7.6%	3.3%	10.2%	7.8%
<b>2020</b>	39.2%	9.7%	2.5%	12.8%	4.8%	4.0%	6.7%	2.7%	12.0%	5.5%
<b>2021</b>	43.9%	9.1%	2.3%	11.3%	4.6%	3.3%	6.2%	2.4%	11.5%	5.2%

Source (National Statistics Office of Georgia, 2022)

The mood of the population about travel has changed. In particular, the 31-50-year-old category always prevails among domestic visitors. The share of travelers of this age has increased even more, and in 2021 the percentage of people in this category among visitors was 38.4%. It is noteworthy that the activity of the population aged 15-30 years has slowed down, and the domestic tourism activity of visitors aged 71+ has increased.

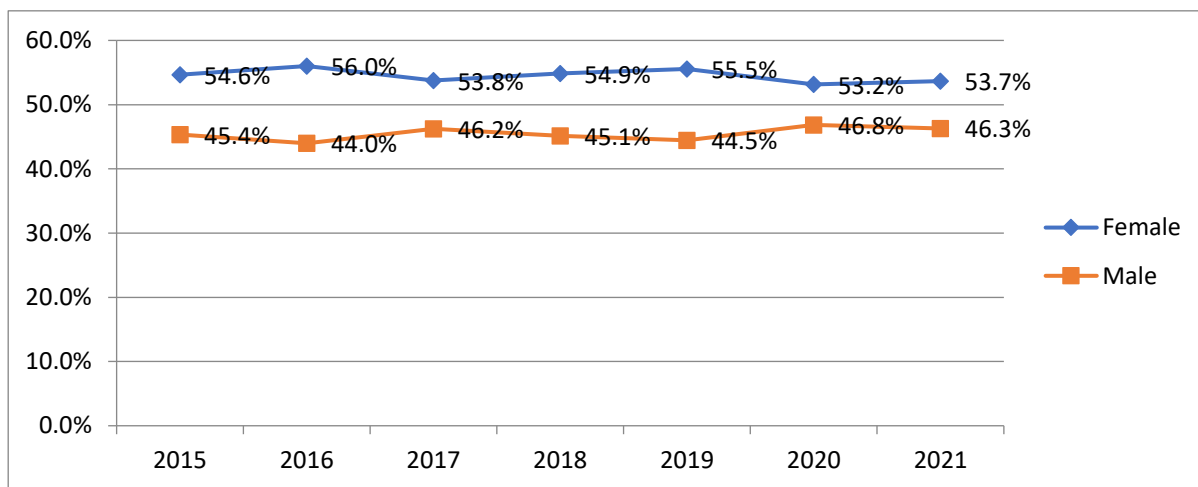
**Figure 1.** Distribution of monthly average number of Georgian resident visitors of age 15 and older by age groups, thousand persons



Source: (<http://tourism.geostat.ge/categories/CDefaultIndicators>, 2023)

According to the data of the National Statistics Office, men are more active in domestic tourism, and their share in the total number of tourists ranges from 53.7% to 55.5%. (See diagram 2)

**Figure 2.** Distribution of monthly average number of Georgian resident visitors of age 15 and older by gender, %

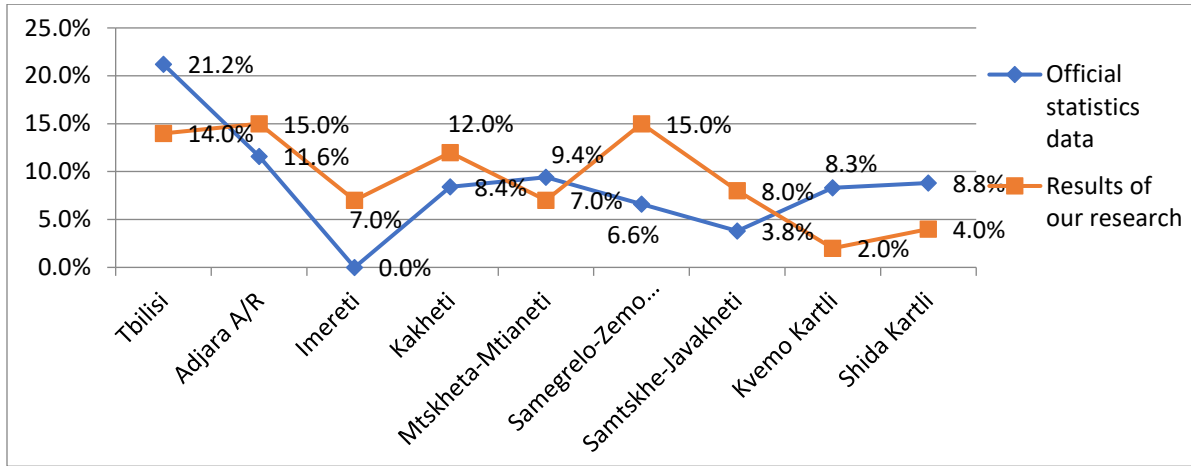


Source: (<http://tourism.geostat.ge/categories/CRegionalAnalysis>, 2023)

It is interesting to see the structure of the visited regions. According to official statistical data, as expected, the most visited place was Tbilisi (21.2% of visits), then Imereti (17.1%), Adjara (11.6%), Mtskheta Mtianeti (9.4%), Shida Kartli (8, 8%), Kakheti (8.4%) Kvemo Kartli (8.3%).

Based on these results, we can state that there are no significant differences between official statistical data and the results of our research in the distribution of respondents based on the regions visited. As we can see, there are three major regions: Tbilisi, Adjara and Imereti, however, as the research showed, the percentage distribution in Mtskheta Mtianeti and Kakheti region are close to these three.

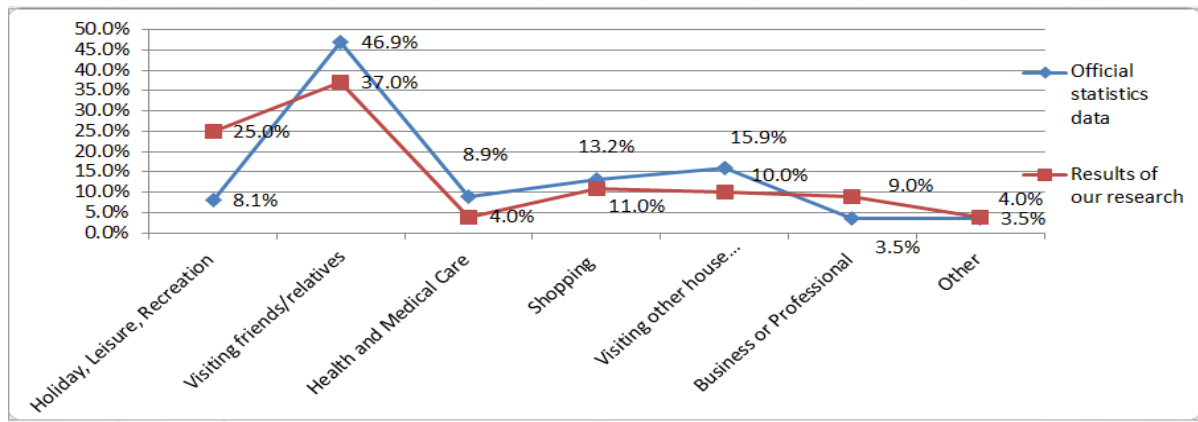
**Figure 3.** Distribution of monthly average number of visits made by Georgian resident visitors of age 15 and older on the territory of Georgia by visited regions, %



Source: (<http://tourism.geostat.ge/categories/CRegionalAnalysis>, 2023) The results of the conducted research.

The results of the National Statistics Office and our research regarding the purpose of domestic travel are different. According to the research of the National Statistics Office, citizens of Georgia travel mainly to visit friends/relatives (46.9%) and to visit their second home (15.8%). However, according to the results of the research conducted by us, the purpose of domestic tourism is mainly to visit friends/relatives (37%), but also for relaxation, entertainment, and recreation (25%).

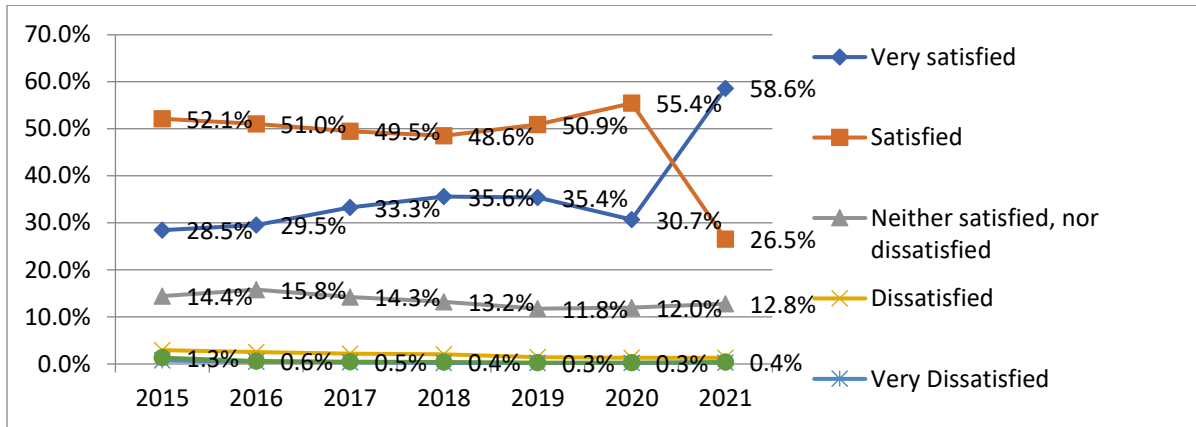
**Figure 4.** Distribution of monthly average number of visits made by Georgian resident visitors on the territory of Georgia of age 15 and older by main purpose, %



Source National Statistics Office of Georgia, 2022; The results of the conducted research

Most importantly, the residents of the country are predominantly satisfied with domestic tourist trips, which was confirmed by the results of our research as well as by the data of the National Statistics Office.

**Figure 5.** Distribution of monthly average number of visits made by Georgian resident visitors of age 15 and older on the territory of Georgia by satisfaction level, %



Source: (National Statistics Office of Georgia, 2022)

According to the results of our research, almost 90% of the respondents were satisfied with their trip.

Along with the increase in the level of satisfaction, the amount of incurred expenses is also increasing. In 2021 alone, the amount of domestic tourism expenses increased by 54% compared to the previous year and summed up to 226 million GEL. From 2015 to 2021, every year, the average expenses have been increasing by 10% (The average annual growth rate was 110%).

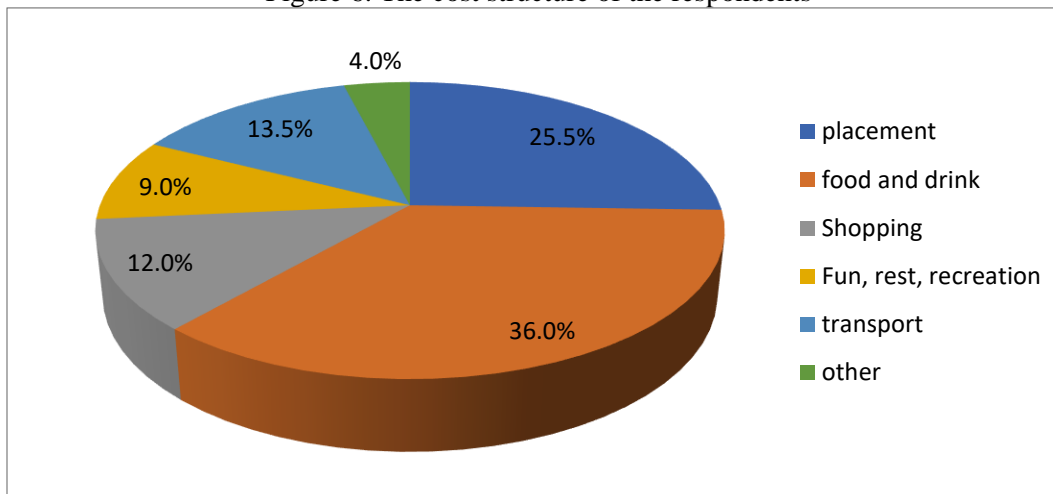
**Table 2.** Distributing of monthly average expenditure spent by Georgian resident visitors of age 15 and older during the visits on the territory of Georgia by expenditure categories, min. GEL

	Accommodation	Foods and drinks	Shopping	Holiday, leisure, recreation, cultural and sporting activities	Transport	Other expenditure	Total expenditure
2015	4.5	36.4	35.9	1.7	22.9	26.0	<b>127.5</b>
2016	6.3	38.7	36.1	2.2	22.8	29.1	<b>135.2</b>
2017	5.6	33.4	41.9	1.8	25.3	28.0	<b>136.0</b>
2018	7.2	33.3	48.6	2.1	25.4	28.2	<b>144.8</b>
2019	6.9	37.6	50.8	2.5	28.0	27.8	<b>153.5</b>
2020	7.0	35.6	53.9	1.3	27.5	22.0	<b>147.1</b>
2021	10.6	54.8	79.2	1.5	46.8	33.3	<b>226.0</b>

Source: (National Statistics Office of Georgia, 2022)

According to the latest data from the National Statistics Office, the largest share of expenses is spent on shopping (35.0%). However, according to our research, the most money is spent on food and drinks (36%), followed by accommodation (25%) and transportation costs (13.5%). (see diagram 7).

Figure 6. The cost structure of the respondents



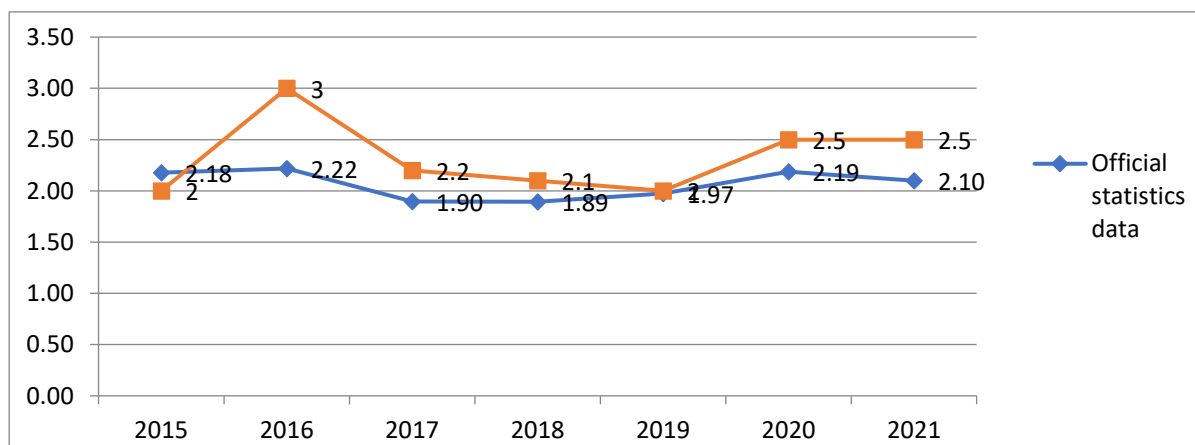
Source: (The results of the conducted research, 2022)

As we can see, the amount of expenses incurred on the means of accommodation is high. Among them, the largest share comes from the hotel (23%), followed by rented house/apartment/room and own, second house/apartment, with 19% and 18% share, respectively.

As for the duration of the stay, 48% of the visits lasted for 1-3 nights, and the accommodation was mainly a relative's/friend's apartment or a hotel. In the case of 40% of the visits, the duration of the stay was 4-7 nights. In this case, the most popular accommodation type was a rented house/apartment/room. In case of long-term visits, mostly their own, second house/apartment is chosen as accommodation.

As Figure 8 shows, the average number of nights spent by visitors is slightly increasing.

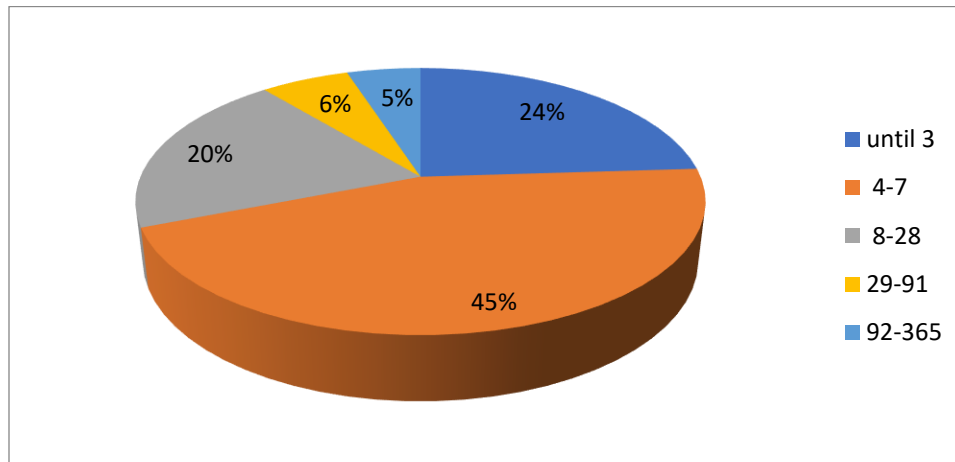
Figure 7. Monthly average number of nights spent by Georgian resident visitors of age 15 and older during the visits on the territory of Georgia



Source (The results of the conducted research, 2022)

Nevertheless, we can say that the residents of Georgia are more attracted to short-term visits, and in future travels, they will still prefer short-term trips.

**Figure 8.** Expected visit duration



Source: (The results of the conducted research)

As we can see from the chart above, in future travels, like from the data of the actual trips, people still tend towards short-term travels. However, the difference is that a larger share goes to 4-7- and 1-3-day visits.

Family/relatives predominate among accompanying people during domestic trips, although the number of those wishing to travel alone is also increasing; Popular accommodation options include hotels and home-rental services.

According to our research, among the respondents, mountain tourism was the most popular; marine tourism took the second position, followed by eco and agrotourism. The obtained results are very diverse, which gives us the reason to say that any of the tourism products listed above has the potential to develop further if the right steps are taken in the proper direction. There is a demand for many types of tourism products in the country, desires of domestic travelers are different.

For instance, according to the results of the research, mountain tourism (21%), sea tourism (17%), and eco and agrotourism (15%) are the most prioritized tourist products. According to respondents, Svaneti, Adjara, Tusheti, Kazbegi, and Fasanauri (for rafting) are the most appealing destinations. When asked how many days they plan to travel inside the country in the future travel plans, 44.3% of respondents answered 4-7 days, and 14.8% responded 1-3 days.

As it turns out, the residents of Georgia are still most attracted to short-term visits.

The distribution of desired companions on the future trip is also similar to the actual past visit data. In particular, 51% of respondents would like to travel with friends, and 31% with family/relatives. It is worth noting that only 12% of respondents expressed their desire to travel alone.

**We can conclude that:**

- ❖ Domestic tourism is gaining strength in the country, especially among the young population; the number of people willing to travel domestically has increased.
- ❖ Men are more active among domestic travelers, and their share in the total number of tourists ranges from 53.7% to 55.5%.
- ❖ Most visits were made to Tbilisi (21.2% of visits), Imereti (17.1%), Adjara (11.6%), then Mtskheta Mtianeti (9.4%), Shida Kartli (8.8%), Kakheti (8.4%) and Kvemo Kartli (8.3%).
- ❖ The purpose of domestic travel has transformed. According to the survey, visiting friends/relatives came first, followed by relaxation, entertainment, and recreation.
- ❖ Among the residents of the country, the degree of satisfaction with domestic tourist trips is quite high.
- ❖ The volume of expenses is increasing. The largest share is spent on food and drinks (36%), then accommodation (25%) and transportation (13.5%).

- ❖ Residents of Georgia are more interested in short-term visits. And in future planned travels, preference will be given to short-term trips.
- ❖ According to the results of the research conducted by us, mountain tourism was the most popular among the respondents, followed by sea tourism and eco and agrotourism.

Based on all the above, post tourism shock rehabilitation is actively underway in Georgia.

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