



Svaneti Tourism Development Strategy & Action Plan

Part 1: Assessment



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Green Economy: Sustainable
Mountain Tourism and Organic
Agriculture (GRETA) Office
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RDA - Resort Development Agency
MDF - Municipal Development Fund of Georgia
NACHP - National Agency for Cultural Heritage Preservation

State companies and respected departments of the line Ministries responsible for energy, water-sanitation, solid waste and roads.

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CBT Community-Based Tourism
DMO Destination Management or Marketing Organization
FIT Free/Fully Independent Traveler
GIS Geographic Information System
GNTA Georgia National Tourism Authority
ITO Inbound Tour Operator
MICE Meetings, Incentives, Conferences, Exhibitions
MSME Micro, Small and Medium-Sized Enterprise
NGO Non-Governmental Organization
OTA Online Travel Agency
PPP Public Private Partnership
SAVE Scientific, Academic, Volunteer and Educational
TO Tour Operator
LEPL Legal Entity of Public Law
UNWTO United Nations World Tourism Organization
USAID United States Agency for International Development

International Traveler - An international traveler is someone who moves between different geographic locations for any purpose and any duration. It excludes foreign citizens who are Georgian residents and includes Georgian citizens who are foreign residents

International Tourism - International tourism comprises inbound tourism and outbound tourism, that is to say, the activities of resident visitors outside the country of reference, either as part of domestic or outbound tourism trips and the activities of non- resident visitors within the country of reference on inbound tourism trips.

International Visitor - An international visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited.

Tourism Expenditure - Tourism expenditure refers to the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid or reimbursed by others.

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Introduction and Summary

Project Background

The Austrian Development Agency (ADA), with the financial support from the Delegation of the European Union (EU), Government of Sweden and the Federal Government of Austria, implements the “Green Economy: Sustainable Mountain Tourism and Organic Agriculture (GRETA)” project. The project implements activities to [1] Improve the business environment for organic agriculture and sustainable mountain tourism; [2] create new and improved income opportunities in sustainable mountain tourism and organic agriculture and [3] strengthen the capacity of stakeholders active in these sectors. GRETA is implemented between 2019 and 2023 in selected municipalities of Georgia covering the Mestia, Lentekhi, Tsageri, Oni, Ambrolauri, Sachkhere, Chiatura and Tkibuli for the respected regions of Georgia - Samegrelo-Zemo Svaneti, Racha, Lechkhumi and Kvemo Svaneti and Imereti regions..

An activity tasked as a part of this project was to create a “Destination Development Strategy and Action Plan” for the Upper and Lower Svaneti (that includes territories of the municipalities of Mestia and Lentekhi). Presented in this document is the first part of the consultant’s assignment, the “Strategic Assessment”. After completion of this part, the JV of the Consultant firms CCG and Solimar International will deliver the final document “Svaneti Tourism Development Strategy and Action Plan” for the period of 5 years.

Purpose of a Development Strategy

Destination management is a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor’s experience. It takes into account the needs of visitors, local residents, businesses, and the environment. A tourism development strategy and action plan (herein referred to simply as the “Strategy” or “Plan”) is a shared statement of intent to manage a destination over a stated period of time, articulating the roles of the different stakeholders, identifying clear actions that they will take, the apportionment of resources, and to insure long term sustainable management practices.. This document is designed to be utilized by stakeholders in the Svaneti region to advocate for themselves, to coordinate actions between public and private sector at municipal, regional and national level, to attract development aid and governmental funds to improve infrastructure and municipal services, and with that create conditions to insure sustainable development and competitiveness of the Svaneti region.

The Assessment

The objective of the assessment is to build a shared understanding of the trends of the region’s tourism economy, including its visitor profile, infrastructure, tourism sector services, challenges, and attractions to provide context for the development strategy, its vision, objectives, and action plans. The analysis presents relevant information about the current

tourism situation in the winter and summer seasons and considers opportunities for improvement based on the findings.

In Section 1, national and municipal reviews of facts and figures, current trends and statistics about tourism provide context from a wider perspective to calculate and compare. This leads into the analysis of Svaneti's competitive positioning and review of the destination's infrastructure, assets and services in Section 2. In the final section, winter, summer and new market opportunities are presented along with considerations of major constraints or challenges through PESTLE and SWOT analyses.

Methodology

The Analysis and Strategy development process involved desk research, field research, and a consultation with a wide range of stakeholders from local government, tourism operators, accommodation providers, small business owners, and residents across the Svaneti region.

Merging international experiences and local knowledge is the only way to obtain specific information, build commitment and ownership of the document. With that in mind, a team of experts conducted visits and, with support of the region's destination management organization (DMO), organized meetings with the local stakeholders in Mestia and Lentekhi.

The team of local contributors worked closely with the national and international team of the experts, having online and physical meetings almost on a daily basis. This helped to

establish a working process and to obtain valuable information. The assessment phase work reflects information about a wide range of factors that are directly or indirectly impacted on the tourism development in the project focus area: geographic, political, demographic, urban planning, public services, infrastructure, energy, roads, water and sanitation, cultural heritage, resorts, economic statistics, etc. Technical reports provided by respected national experts are provided in the [Annex](#).

Desk research was conducted to collect data on key tourism indicators to help describe the current situation in Svaneti. Specific attention was given to work that is already implemented and documented. As a result of the desk research, all relevant documents and studies available at national, regional and municipal level were collected, and reviewed.

The team of the national experts conducted numerous visits prior to the assessment period, organized 4 meetings (2 in each municipality) with the objective to establish strong bilateral communication between the respected technical experts. Two important stakeholders' meetings took place in Mestia and Lentekhi where the assessment report's findings were shared and agreed with by stakeholders.

The subject of the assessment is not only the tourism centers, but more focused on overall opportunities covering remote villages, less visited areas and new products that can be developed within the framework of the 1-5 years of strategic planning.



1.0 The Tourism Situation in Georgia

1.1 National Tourism Trends

This section provides both demographic and seasonal information on the types of travelers visiting the country along with graphs and statistics to help understand opportunities for attracting new market segments.

Located at the crossroads of Europe and Asia, Georgia has become an increasingly popular tourist destination in recent years. The country's diverse landscape, which includes the stunning Caucasus mountain range, has attracted a range of visitors from around the world. In terms of demographics, Georgia's tourism industry has seen a mix of solo travelers, couples, families, and groups, with a particular increase in the number of millennial travelers in recent years. According to the Georgian National Tourism Administration, in 2019, the country welcomed over 9 million international visitors (all international border crossing and non-residents visited), with the majority coming from neighboring countries such as Turkey, Azerbaijan, and Armenia. However, there has been a recent push to attract visitors from further afield, particularly from Europe, Gulf states, Central Asia and North America.

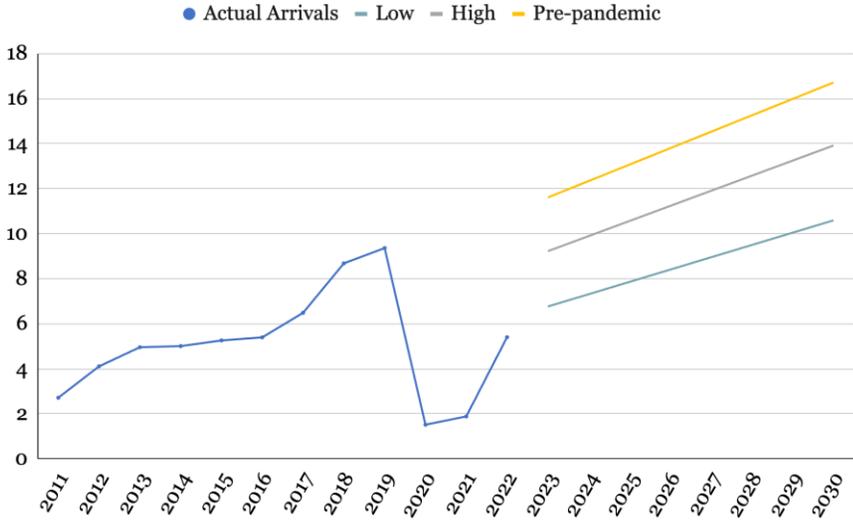
One of the emerging post-pandemic travel trends in Georgia is a growing interest in sustainable environmentally friendly adventure activities and eco-tourism. The country's mountainous regions, including the Caucasus, offer an abundance of outdoor activities and natural beauty, which appeals to travelers seeking a more authentic and environmentally-friendly travel experience. Additionally, there has been a trend towards domestic travel, as people look to explore their own country and support local businesses. Another trend in post-pandemic travel in Georgia is a shift towards digitalization and contactless experiences. With health and safety concerns still at the forefront of many travelers' minds, hotels, restaurants, and tourist attractions are implementing new technologies and procedures to minimize physical contact and enhance hygiene protocols.

1.1.1 Total Tourist Arrivals

Tourism has become a significant contributor to Georgia's economy, and the country has experienced an increase in the number of international visitors over the years, particularly between 2010 and 2019. According to data provided by the Georgia National Tourism Association, Georgia received 9.4 million international visitors in 2019, a record number and an 8% increase over 2018.

The tourism industry has faced significant challenges in recent years. Like most countries, Georgia was affected by the COVID-19 pandemic in 2020, which led to a sharp decline in tourist arrivals by 82.3% compared to the previous year due to travel restrictions and border closures. Despite these challenges, the Georgian government and the tourism industry have taken steps to revitalize the sector, including launching promotional campaigns and implementing safety measures. As a result, there are signs of recovery, with the number of international tourist arrivals increasing by 34.6% in 2021 compared to the previous year. In 2022, the total international tourist arrivals hit 5.4 million, 188% over the previous year. By 2022 the number of international visits encountered 88% compared to the 2019, also trends towards a longer stay and more visitors spending is certainly a positive sign that economic impact has already overcome the pre-pandemic period.

Figure 1: Total Annual Tourist Arrivals (millions) with pandemic recovery trend lines. Source: GRETA



1.1.2 Economic Impact

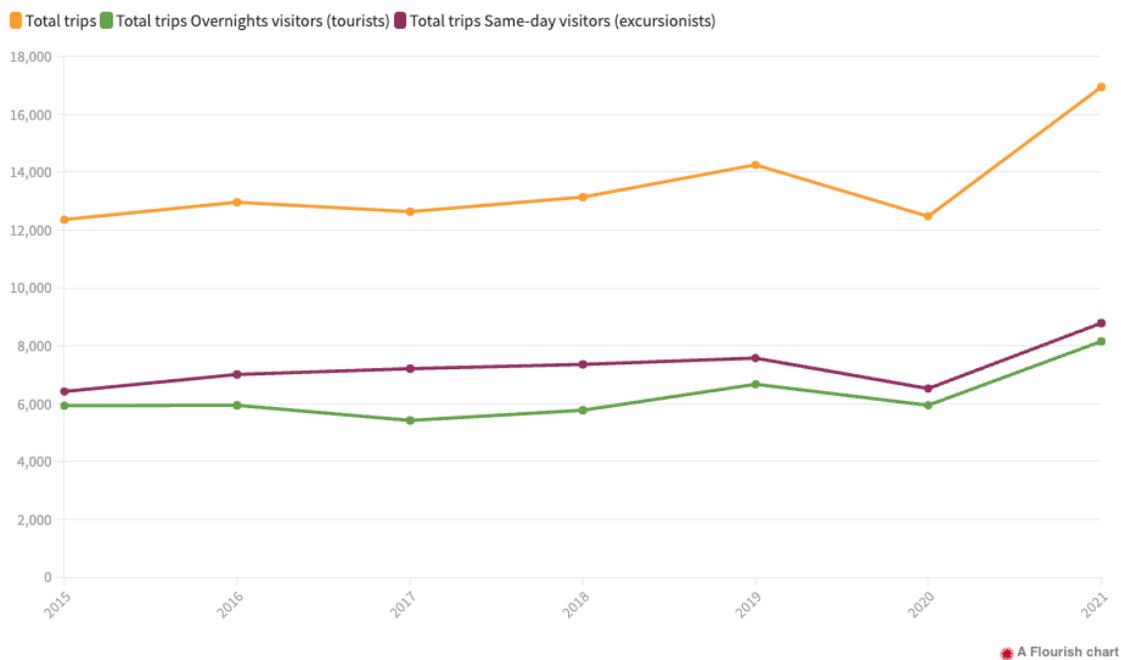
According to the World Travel and Tourism Council, the tourism sector in Georgia directly employed 170,000 people in 2019, which represented 5.6% of total employment in the country. The pandemic's impact on the tourism industry caused a significant 40% reduction in the number of people employed in the sector by the end of 2021 from 2019 levels. With recovery on the rise, according to a report by TBC Capital, revenue generated by international visitors amounted to 3.16 billion USD in 11 months of 2022, exceeding the 11M 2019 levels by 4%. Compared to 2019, travel receipts fully recovered by July of 2022. The trip expenditures in 2022 averaged 2,298 GEL (equals to

919 USD), which is significantly higher than it was pre-pandemic (350USD). However, this unprecedented increase is also an effect of the temporary migration of the citizens of Russia, Ukraine and Belarus due to the Russian-Ukrainian war.

1.1.3 Domestic Travelers

Domestic tourism coming mostly from the capital city produced 16.3 millions trips in 2022, according to the GNTA. The main purpose of the trips (51%) are to visit relatives and only 9.7% travel for leisure. 4.2% visited Samegrelo Zemo Svaneti for leisure, and 3.5% Racha Lechkhumi-Kvemo Svaneti.

Figure 2: Domestic Trips Over Time, Source: UNWTO



1.1.4 International Travelers

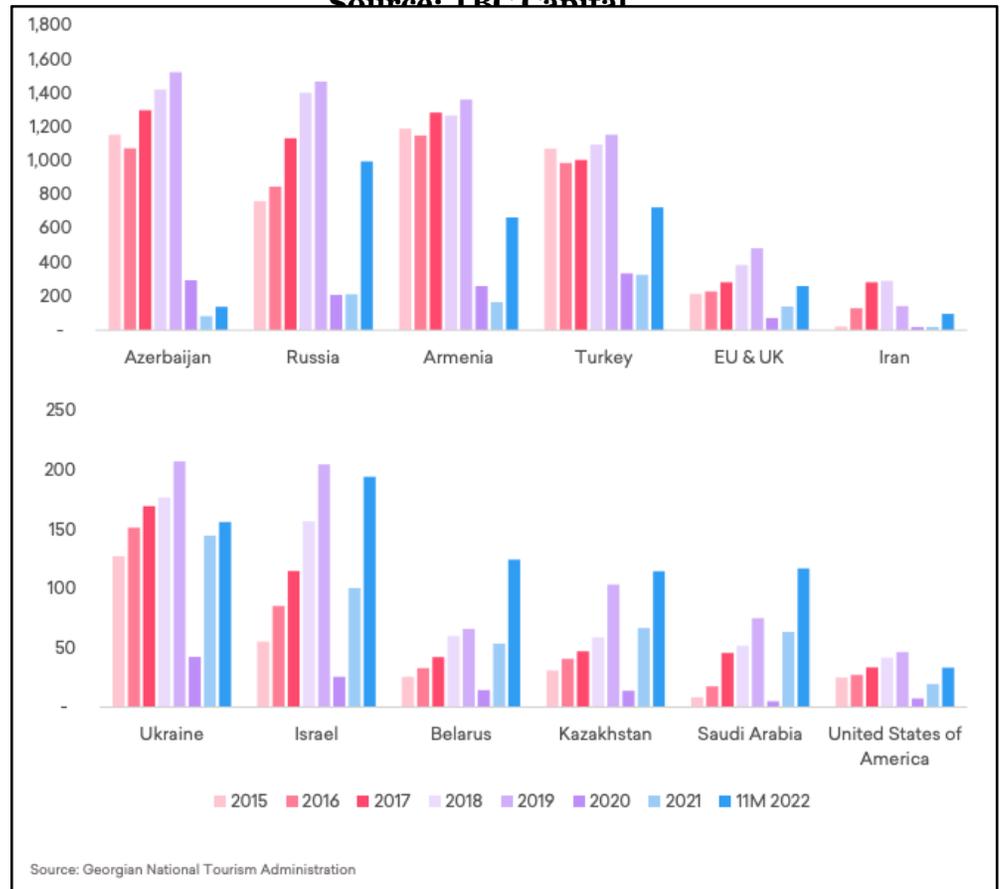
Georgia's tourism industry is largely driven (68.8% in 2022) by its proximity to neighboring countries such as Armenia, Turkey, Azerbaijan, and Russia. While the pandemic and land border closures have had an impact, Georgia has recently seen notable growth rates from middle-range countries such as Israel, Ukraine, Kazakhstan, and Saudi Arabia.

In 2022, tourists from the Middle East are expected to account for 11% of international visitors, while visitors from EU and UK nations account for roughly 6%. These numbers represent significant growth rates and the proportion of first-time visitors to Georgia has increased from 28% to 32%, with 1.45 million first time visitors in 2022, suggesting new market opportunities for the tourism sector, leading to a more resilient industry through diversification.

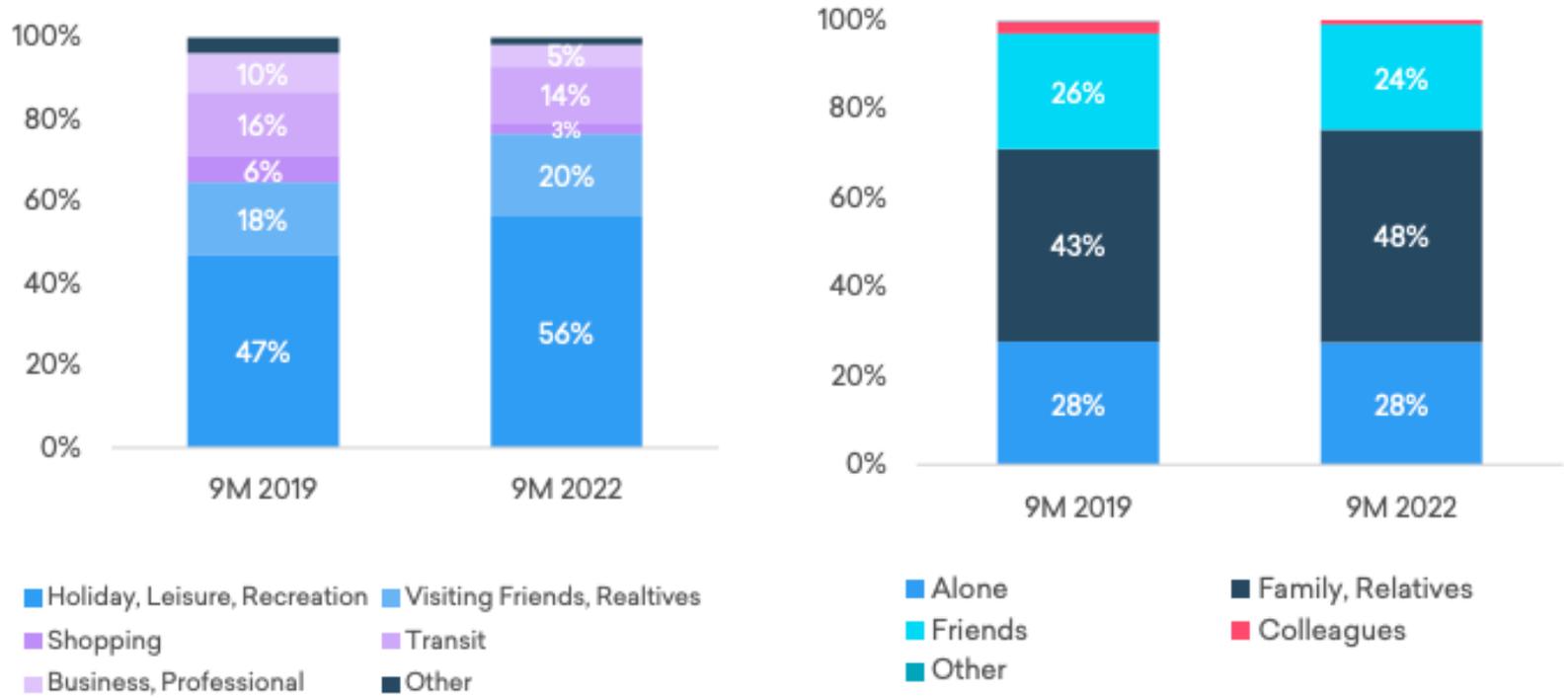
While the number of tourists from these regions is relatively low, there is potential to draw more visitors from these areas. For example, about 271,266 visitors from EU member states visited Georgia in 2022, with the majority (11%) coming from Poland - a market of travelers who emphasize discovering new places (74%), a safe environment (67%), and travel affordability (67%) when arranging a vacation abroad. Additionally, it is important to consider which international visitors are driving high average spending in hotels, such as visitors from Kuwait who have paid as much as GEL 812 in 2019 and are still in first place in terms of average spending in hotels, according to TBC Capital.

Figure 3: International Visitor Trips by Countries ('000),

Source: TBC Capital



Figures 4 & 5: International Visitor Trips by Purpose of the Trip (Left) and International Visitor Trips by Company (Right). Source: TBC Capital.



1.1.5 Seasonality, Occupancy, and Length of Stay

According to the latest available data, the average length of stay for international travelers is 6.2 days. Central and Eastern European tourists stay for the longest period, average number - 9.7 days. It is worth noting that this can vary greatly depending on the purpose of travel and the specific destination within the country. For example, visitors to popular destinations like Tbilisi or Batumi may stay for a shorter period of time, while those traveling to more remote areas such as Svaneti or Kazbegi may stay for longer periods.

77.7%
Overnight stays
3,652,949 in 2022

22.3%
Day Trips
1,050,996 in 2022

Figure 6: Average Length of Stay. Source: TBC Capital.

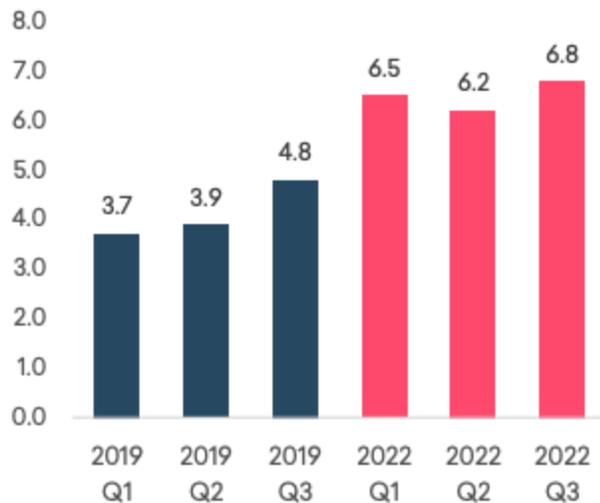
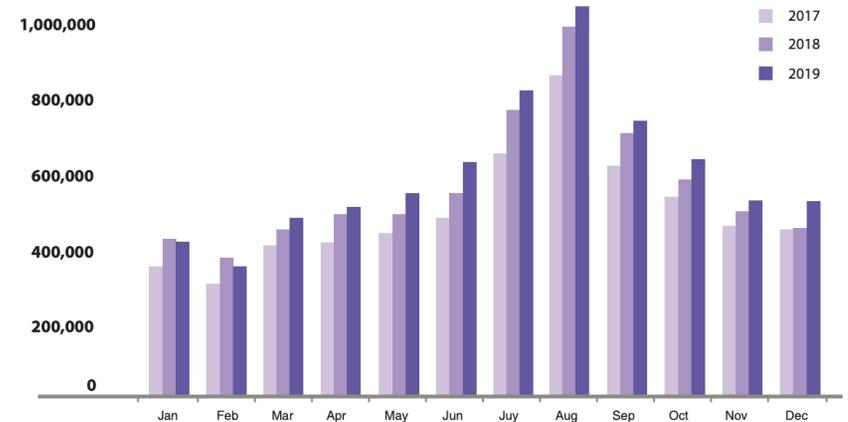


Figure 7: International Visitor Trips Per Month, Source: Ministry of Internal Affairs of Georgia.

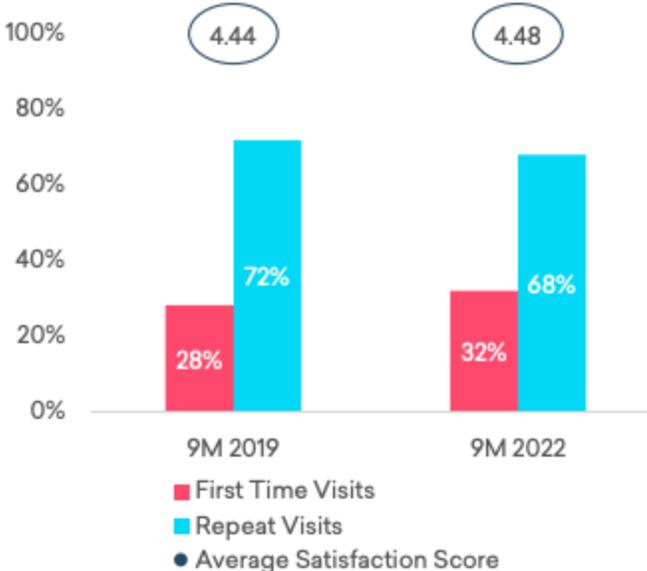


1.1.6 Visitor Experience and Satisfaction

93.4% of visitors didn't use any tour operator companies. That means more visitors planned trips independently, which is in line with international trends and very common in countries with a safe travel environment. Georgia is one of the safest countries in the world according to the WTO indicator despite the border with Russia. According to data from GNTA, the average visitor satisfaction score in 2022 was about 4.5 out of 5.

57.2% of international visitors visit Tbilisi and 43.8% Batumi. Other more or less popular cities are Kazbegi (9.4%), Mtskheta, Kutaisi, Borjomi, Gudauri, Marneuli and Signagi.

Figure 7: International Visitor Trips by Visiting Practice and Average Satisfaction. Source: TBC Capital.



1.2 National Tourism Governance and role of the destination development organization

In Georgia, several regional and national organizations play a critical role in the decision-making and implementation of actions that impact the tourism industry and the visitor experience. At the national level, the Georgian National Tourism Administration (GNTA) is responsible for developing and implementing policies related to tourism development, marketing, and promotion. The GNTA collaborates closely with the Ministry of Economy and Sustainable Development, the Agency of Protected Areas (APA), the Georgian National Agency for Cultural Heritage Preservation (NACH), MTA - Mountains Trails Agency with newly established Resorts Development Agency, and other government agencies to ensure that policies and initiatives align with broader economic and social development goals.

Additionally, several regional Destination Management Organizations (DMOs) exist to support tourism development at the local level. For example, the Adjara Tourism Department and the regional DMOs (Kakheti, Imereti, Samtskhe-Javakheti, Samegrelo and Svaneti) work to promote tourism in their respective regions by organizing events, supporting local businesses, and promoting cultural and natural attractions. At the municipal level, local governments are responsible for implementing policies related to tourism and providing necessary infrastructure and services to support the visitor experience.

DMO Svaneti “ShanLand” has been established in 2018 founded by two municipalities of Mestia and Lentekhi. DMO passed intensive 16 week training program run by the Solimar International according to the UNWTO destination development program. Structure of the DMO is an exceptional case in Georgia, when municipalities of the two territorial regions merged due to its historic relations and development trends. DMO also managed to engage founder members from the private sector representatives, that is another important element for the public-private partnership. During the recent years DMO played a role of the host institution during the organization of the several international events, such as Freeride World Tour Qualifier, Highlander in Svaneti, run several cultural events and festivals. This good practices were implemented with support of the municipality of Mestia and various international donors such as USAID, GRETA, GiZ, etc.

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In recent years, several associations have also emerged to support the growth of Georgia's tourism industry. These include the Georgian Tourism Association, the Georgian Association of Incoming Tour Operators, the Ecotourism Association, Tourism Alliance, Mountain Guides Association and other sector-oriented professional unions which advocate for the interests of tourism businesses and provide training and support to industry professionals. Overall, the involvement of these organizations at various levels of government and the private sector is essential to ensuring the sustainable growth and development of Georgia's tourism industry.

2.0 Analysis of Svaneti's Competitive Position

2.1 Svaneti Destination Overview

Situated in the northern part of Georgia on the southern slopes of the Caucasus mountain range, Svaneti is considered the highest populated place in the Caucasus. The region is home to some of the most dramatic mountain landscapes in Europe, including the highest peak in Georgia, Mount Shkhara (5,193 m), and the mysterious white pyramid of Mt. Tetnuldi (4,858m), and the iconic two-horn summit of Mt. Ushba (4,710 m). Surrounded by towering peaks, Svaneti offers visitors the opportunity to hike through lush forests, along winding rivers, and past cascading waterfalls. For adventure seekers, Svaneti offers hiking, mountaineering, and skiing opportunities. During the winter months, visitors can hit the slopes at the nearby ski resorts, while in the summer, they can embark on challenging treks through the mountains.

Svaneti is a breathtaking destination that combines stunning natural beauty and adventurous activities with rich history and culture. The region is known for its unique architecture, with over 200 medieval watchtowers dotting the landscape. Visitors can explore the ancient fortified villages of Ushguli and Mestia, which are home to some of the most impressive towers and churches in the region. Foodies will also find plenty to love in Svaneti, with its traditional dishes like Kubdari, Chvishtari, honey and cheese produced by local farmers.

Svaneti is divided into Upper and Lower Svaneti, which are separated by the Svaneti ridge, where two main passes are located - Latpar and Zekar passes. Zemo Svaneti (Upper) encompasses the municipality of Mestia, which is the largest municipality in Georgia by territory. The town of Mestia serves as the municipality's center, which includes 17 administrative units (154 villages). The annual average temperature in Zemo Svaneti is 5.7°C, with January being the coldest month at -6.4°C and July the warmest at 16.4°C. The annual rainfall is 1035 mm. According to the latest available data from 2021, approximately 9,500 people reside in the municipality of Mestia, 1900 residents in the town of Mestia and the rest living in 11 communities and 153 villages.

Lentekhi municipality is one of four within the Racha-Lechkhumi and Kvemo Svaneti region, and one of the smallest municipalities by population in Georgia. Lentekhi serves as the municipality's center and comprises 55 settlements, one township, and 54 villages. Located at an altitude of 760 meters above sea level, the weather in Lentekhi is also humid, with an average annual temperature of 9.4°C, January being the coldest month at -1.8°C and July the warmest at 20°C. The annual precipitation is 1240 mm. According to the latest available data, approximately 4,200 people reside in the Lentekhi municipality among 7 communities, with a population decrease by 50% from in the past decade.

2.1.1 History of Region

Traces of human life in the territory of Svaneti date back to the Neolithic period, with records dating as far back as the VIII-VII millennium BCE. Neolithic settlements have been discovered in Langer in Zemo Svaneti and in Tshmeluri in Kvemo Svaneti. In the Bronze Age, a dense settlement appeared in Svaneti between the IV-I millennia BCE.

The Svans were initially settled in a larger area and held a significant portion of modern-day Lechkhumi, Abkhazia, and Racha. They also inhabited a specific area in today's Samegrelo region. According to Strabo, the Svans lived on the peaks of the Caucasus, above Dioscuria, which suggests they were also settled in the territory of modern-day Abkhazia. The Svans were also present in the North Caucasus, particularly in the headwaters of the Tergi and Kuban rivers, where Svan toponyms have also been confirmed.

Svaneti was historically divided into various communities. Kvemo Svaneti, which was ruled by the princes of Samegrelo, was composed of three distinct communities, namely Lentekhi, Choluri, and Lashkheti. On the other hand, Zemo Svaneti, which was separated into two parts by the Bali ridge, consisted of twelve different communities. Bal's Kvemo Svaneti was under the domain of the Dadeshkelians, and it encompassed the communities of Etseri, Fari, Tshumari, and Becho. The remaining eight communities of Svaneti were considered free and included Latali, Langer, Mestia, Mulakh (Mulakh-Muzhal), Tsvirmi, Ifari, Kala, and Ushguli.

The cultural heritage of Svaneti is of great value not only to Georgia but also to the world. Many small, hall churches in Svaneti contain treasures of Georgian art, including engraved and painted icons, carved wooden doors, illuminated manuscripts, crosses in front of the altar and outside, and wall paintings. Additionally, Svaneti is home to approximately two hundred towers, which were primarily constructed for defense purposes. Each clan in Svaneti had its own tower, which was built with the assistance of the entire village and community. In 1936, St. Seti A historical-ethnographic museum was created on the basis of the material preserved in George's Church in Mestia. In 1970, the old district of Mestia was declared a nature reserve, and in 1971, the Ushgul-Chazhash Nature Reserve was created to preserve the Svan architecture. In 1996, Ushguli (a community of 4 high mountain villages) was included in the World Heritage List as a cultural-architectural monument of world unique outstanding value, with subjects of magic and cult still alive in the ethnographic existence of the Svans.

2.2 The Tourism Situation in Svaneti

The first tourists arrived in Svaneti in the 19th century, and the Svans treated them with exceptional hospitality. Travelers' journals and historical documents praise the Svans' hospitality highly. Then, during the communist era, Svaneti started to gain popularity in the former Soviet Union. Tourists from Europe made brave attempts to enter Svaneti, but the KGB and security services didn't allow them. In Svaneti, "tourbaza"-style hotels operated during the Soviet era, which merged quite naturally with the culture of the time. The locals found that interacting with Russian tourists and climbers was a positive experience. Numerous groups of backpacking tourists would swarm to the passes and mountains as soon as the summer season began. This period abruptly came to an end, and since the 1990s, international hikers are gone.

The 1990s were a very difficult time in Georgia, with war, political and economic turmoil, and violence, and as a result, tourism was forgotten. After the Rose Revolution in the early 2000s, the situation in the country began to change, and Svaneti's safe reputation began to be restored gradually.

Since 2007, the Georgian government has made significant investments in Upper Svaneti, aimed at promoting the development of the tourism industry while also contributing to the complex socio-economic development of the region. The state-funded large-scale projects in Svaneti are worthy of note, including the urban rehabilitation of the Mestia townlet's and conservation of the its historic districts, the complete rehabilitation of the Zugdidi-Mestia connecting highway and the laying of a new concrete road, the construction of the Mestia airport, the urban improvement of Mestia, and the Hatsvali mountain and Tetnuldi ski cableway complexes. The Hatsvali ski-area cable car connecting road to Mestia and the Ushguli-Mestia connecting road were also



constructed, while the Mestia museum underwent complete reconstruction. Furthermore, up to 100 historical towers were rehabilitated, and hydro-energy facilities and power transmission lines were constructed or rehabilitated.

In Kvemo Svaneti, the Ambrolauri-Tsageri-Lentekhi highway underwent complete rehabilitation, with restoration of the highway connecting Ushguli-Lentekhi pass and its complete rehabilitation still in progress and slated for completion in 2024. The central square of Lentekhi township and the central area underwent improvement works, and the reconstruction has been completed.

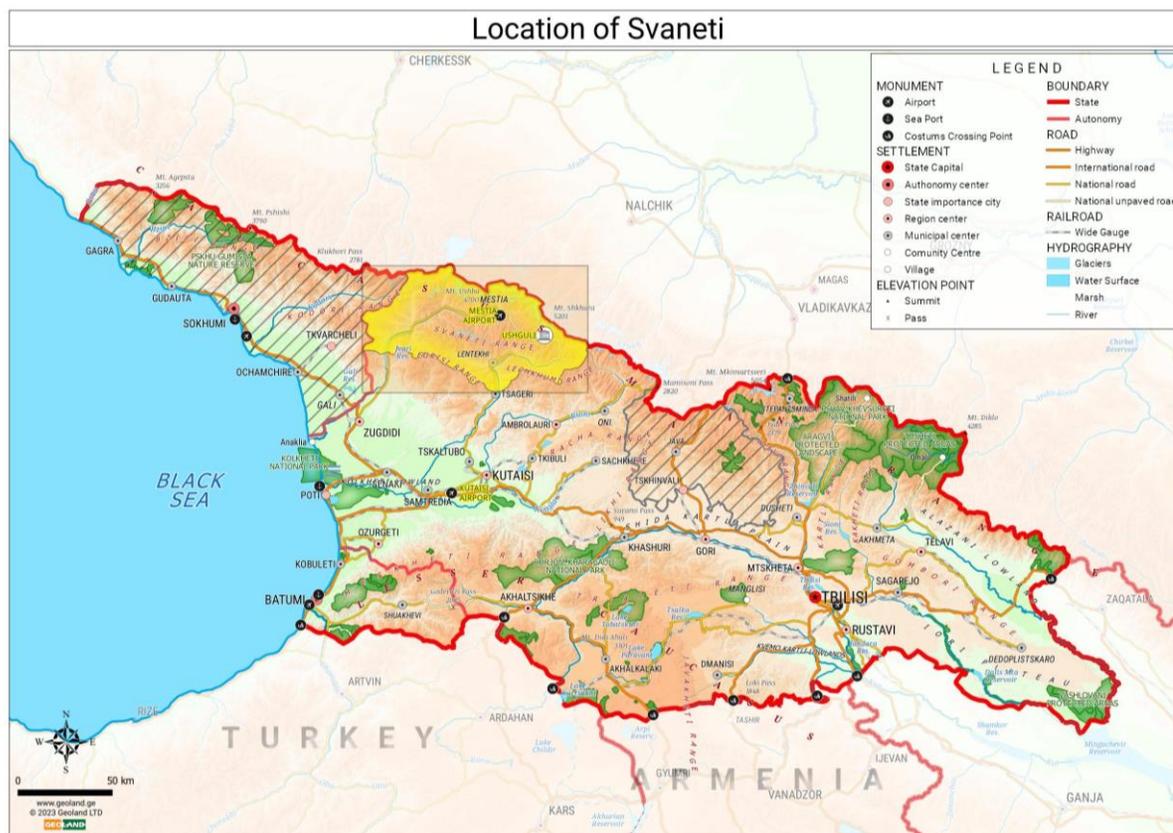
It is worth noting that the purpose of these investments extends beyond tourism and aims to promote the complex socio-economic development of the region. Spatial planning documents are also being prepared to ensure that the natural and cultural heritage of Svaneti

is not endangered. A balanced approach is especially crucial when dealing with cultural heritage areas, historical monuments, social environment and established traditions.

2.2.1 Location and Connectivity

Svaneti is located in the northwestern part of Georgia, on the southern slopes of the Caucasus Range. Racha is bordered to the east, Lechkhumi and Samegrelo to the south, Abkhazia to the west, Karachay-Cherkessia and Kabardino-Balkaria to the north.

Map 1: Location of Svaneti



Road Access

Zemo Svaneti's primary transportation route is the 138-km Zugdidi-Mestia road, which carries the majority of the traffic flow. Although the road's condition is generally normal, frequent landslides and rockfalls impede auto transport. Consequently, regular maintenance and cleaning are necessary, including snow clearance during the winter months. As the axial route, approximately 95% of tourist groups travel through Svaneti using this road, which takes an average of 3-4 hours to pass from Zugdidi. The journey from Tbilisi takes around 8-9 hours by car or bus, and 4-5 hours if traveling from Kutaisi airport. There are also daily flights from Tbilisi to the town of Mestia, which is the main gateway to the region.

The primary transportation route in Kvemo Svaneti is the 89-km Kutaisi-Tskaltubo-Tsageri-Lentekhi road, which takes about 2 hours to pass from Kutaisi. Furthermore, a new 51-km road connecting Tbilisi-Racha was opened in 2021, leading from Sachkhere through Oni and Ambrolauri to Lentekhi. This route takes approximately 5-6 hours to reach Lentekhi from Tbilisi.

Public transportation does not exist in Svaneti, and visitors need to rely on private cars, taxis, or shared minivans to get around. While the roads are generally in good condition, visitors should be aware that some roads can be narrow and winding, particularly in the mountainous areas, so it's essential to take extra care while driving or traveling by minivan.

Once in the region, the best way to explore is by foot, as many of the sights and attractions are located in remote areas that are only accessible on foot or by horseback. Hiking trails are well-marked, and visitors can hire local guides for a more immersive experience.

Table 1: Road transport options available within the region

Transportation Option	Accessibility	Description
Buses	Available in major towns and cities	Buses are a common mode of transportation within the Svaneti region, with regular services operating between major towns and cities. However, service frequencies may be limited in some areas, and schedules can be subject to change.
Trains	Not available in the Svaneti region.	There are no passenger train services in the Svaneti region. The closest train station is in Zugdidi, which is located about 140 km from Mestia. From Zugdidi, travelers can take a bus or hire a taxi to reach the Svaneti region.
Rental car companies	Available in major towns and cities	Rental car companies are available in major towns and cities within the Svaneti region, offering a convenient way for visitors to explore the area at their own pace. However, road conditions can be challenging, particularly in rural areas, so visitors should exercise caution when driving.
Taxis	Available in major towns and cities	Taxis are a readily available mode of transportation within the Svaneti region, with both metered and negotiated fares available. However, visitors should be aware that some taxi drivers may not speak English, and negotiating fares in advance is recommended.
Shared taxis	Available in major towns and cities	Shared taxis, known as “marshrutkas”, are a popular mode of transportation within the Svaneti region. These minivans operate on fixed routes and can be flagged down from the side of the road. However, they can be crowded and uncomfortable, and visitors should be prepared for long waits at times.

Private transfers	Available upon request	Private transfers, such as shuttle buses or private cars, can be arranged upon request through tour operators or accommodation providers. These can be a convenient option for visitors who prefer a more personalized mode of transportation.
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Air Access

In Mestia, Queen Tamar Airport operates Georgia domestic flights. It has a limited runway length of 1.2 km due to the terrain, and though extension of the terminal and runway is planned by the Government, the size currently restricts it to receiving only small aircraft with a capacity of 18-25 passengers. Flight schedules can vary depending on the season, and flights may be canceled due to weather conditions. Regular flights are available from Natakhtari and during peak season from Kutaisi and Batumi, but only 1-2 flights operate per day with a maximum of 50 passengers daily. This falls short of meeting the current demand. Special flights can be arranged through prior agreement with the Ministry of Economy and the Aviation Department, though their numbers are insufficient.

The flight time from Natakhtari is around 1 hour, making it a convenient option for travelers who want to avoid the long drive on winding mountain roads. To encourage accessibility, the Ministry of Economy subsidizes 50% of the cost of these regular flights (GEL 90). The Ambrolauri airport, located 70 km away, is the nearest airport to Lentekhi (about 1.5 hour drive away). Flights from Natakhtari to Ambrolauri and vice versa are available twice a week, costing 50 GEL per flight. Before 1990 (Soviet-era), the airport in Chikhareshi operated a grass runway for small planes. A plan to re-open this airport, about 10 km from Lentekhi, is under the consideration of the government.

The country's aviation regulations allow for private planes, making it a potential attraction for high-end guests. Natakhtari Airport can also operate private jet tours. Another existing opportunity is helicopter flights and connected ski-adventure tourist activities, such as heliski or heli-hiking from Mestia Airport. Several companies already offer these services primarily as a niche tourism winter attraction. While it is an expensive and exclusive service, the demand for this type of experience is on the rise.

Table 2: Local carrier regional flights information

Local Carrier	Airport	Destination	Number of Flights	Cost (in GEL)
Vanilla Sky	Natakhtari	Mestia	1 flight/day (except Saturday)	90

	Batumi	Mestia	1 flight/day (except Saturday)	125
	Kutaisi	Mestia	2 flights/week	50
	Natakhtari	Ambrolauri	2 flights/week	50

International Connectivity

Kutaisi International Airport is the nearest international airport to both the upper and lower regions of Svaneti. Driving time from the airport to Mestia takes around 4-5 hours, and the drive to Lentekhi takes about 2 hours. The airport has a capacity of 600 passengers per hour, and its annual growth rate is 35%. However, flights to Mestia are often canceled due to the mountainous terrain and challenging weather conditions. A modern navigation system is necessary to ensure flight safety in poor visibility conditions.

Kutaisi International Airport plays a significant role in promoting tourism in Svaneti due to its affordability and accessibility with flights operating from Central and Eastern Europe and the UAE. The National Tourism Administration is targeting these markets due to their fast-growing tourist flows. Based on the analysis of these groups, we can identify the key marketplace countries from which consumers interested in Svaneti-specific tourism adventure products may travel to Svaneti in a single day, suggesting a journey of no more than 12 hours.

Demand for tourist vacations to Georgia from the Middle East has been increasing at an unprecedented rate, particularly since 2016, and will account for 11% of international tourists in 2022. The proportion of visitors from EU nations has also risen to roughly 6%. Despite the comparatively low number of tourists from Europe and the Middle East, the developing trend indicates that more visitors from these regions can be drawn. In 2022, for example, up to 271,266 visitors from EU member states visited Georgia. The majority of tourists, roughly 41,917 visits, came from Poland. In 2019-2020, 5.3 million Poles visited foreign countries for tourism. Poles emphasize discovering new places (74%), a safe environment (67%), and travel affordability (67%) when arranging a vacation abroad. Flights from Kutaisi Airport to Poland follow six different routes, with a total travel time of four hours. Georgia has only used 0.8% of the Polish market, while Svaneti has used even less.

The following table displays some of the flights that operate in Georgia's three international airports. Based on the ideal flight and journey duration, we can state that the function of Kutaisi Airport is especially significant for Svaneti, and it should become the major gateway for international travelers intending to visit Svaneti.

Table 6: Sample of flights that operate in Georgia's three international airports

International Itinerary (From-To)	Flight Time	Est. Driving Time
Warsaw-Mestia/Lentekhi	Kutaisi International Airport - 3h 30 min	Kutaisi-Mestia 5 hr Kutaisi-Lentekhi 2 hr
Berlin-Mestia/Lentekhi	Kutaisi International Airport - 3h 45 min	Kutaisi-Mestia 5 hr Kutaisi-Lentekhi 2 hr
Athens-Mestia/Lentekhi	Kutaisi International Airport - 2h 35 min	Kutaisi-Mestia 5 hr Kutaisi-Lentekhi 2 hr
Paris-Mestia/Lentekhi	Kutaisi International Airport - 4h 30 min	Kutaisi-Mestia 5 hr Kutaisi-Lentekhi 2 hr
Abu Dhabi-Mestia/Lentekhi	Kutaisi International Airport - 3h 50 min	Kutaisi-Mestia 5 hr Kutaisi-Lentekhi 2 hr
Istanbul-Mestia/Lentekhi	Batumi International Airport - 1h 45 min	Batumi-Mestia 5h 30 min Batumi-Lentekhi 4 h
Tel Aviv-Mestia/Lentekhi	Batumi International Airport - 2h 15 min	Batumi-Mestia 5h 30 min

		Batumi-Lentekhi 4 h
Dubai-Mestia/Lentekhi	Tbilisi International Airport - 3h 20 min	Tbilisi-Mestia 8 h Tbilisi-Lentekhi 5h 30 min

Map 2: Kutaisi Airport Connections

Figure 10. Air border crossings by Airports ('000)

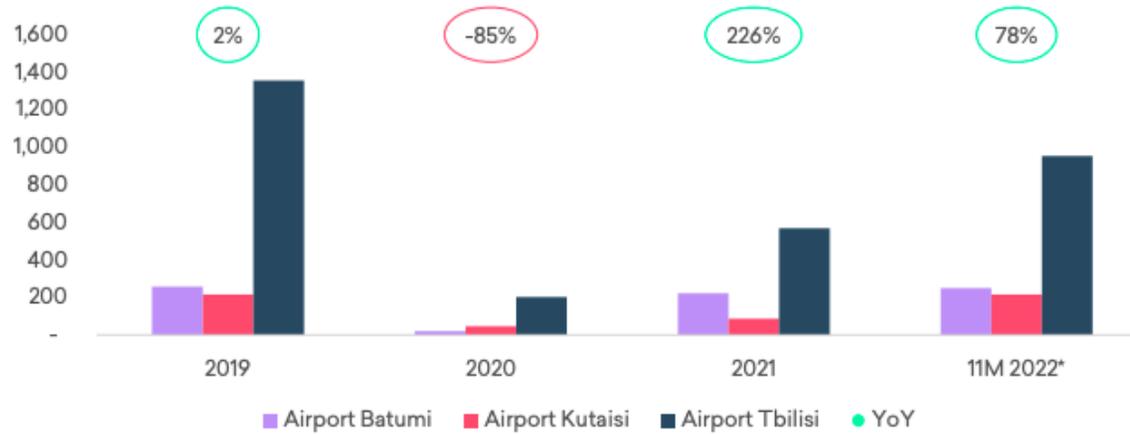


Figure 11. Number of Flights by Georgia's International Airports ('000)

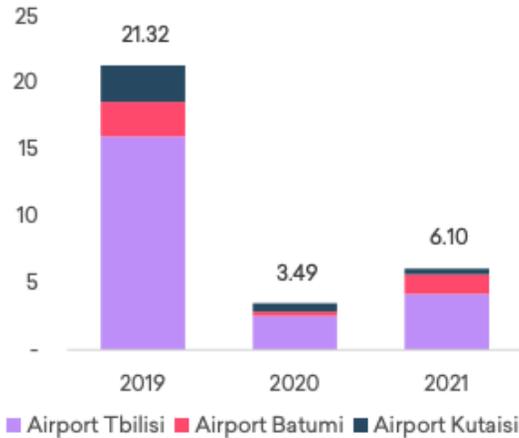
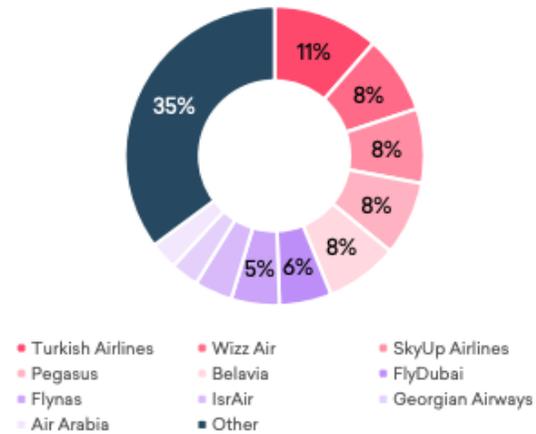


Figure 12. Shares of Airlines by Number of Passengers, 2021



Source: Georgian National Tourism Administration; Georgian Civil Aviation Agency
 *YoY changes for 2022 are calculated by using 11 Month levels in 2021

2.2.2 Tourism Destinations

Mestia and Lentekhi are the main tourism destinations in the Svaneti region. Mestia, the larger of the two, is known for its medieval towers, picturesque landscapes, and skiing opportunities. Visitors can explore the Svaneti Museum of History and Ethnography and take a cable car to the top of the Hatsvali Mountain for a breathtaking view. Lentekhi, on the other hand, is a smaller and more secluded destination, offering a peaceful retreat for nature enthusiasts. Both destinations are easily accessible from Kutaisi International Airport, making them ideal starting points for exploring the Svaneti region.

Svaneti's appeal stems from its unique diversity, which manifests itself in the form of cultural, ethnographic, architectural, folkloric, and natural heritage and goes beyond cities of Mestia and Lentekhi. Each valley and community has its own history and natural ecosystem. These complex phenomena can be effectively depicted if they are considered in a single history-geographical context, Svan historical communities (Temi) defined often to the geographic borders of the particular valleys.

Mestia - UNWTO designated Best Tourism Village 2022

Local Government Authority: [Mestia Municipal Assembly](#)

Mestia is the main gateway to and tourism destination in Svaneti. It is a hub for outdoor adventure activities, including hiking, trekking, horseback riding, skiing, and mountaineering. Visitors can hire local guides and equipment to explore the area's stunning natural beauty, enjoy panoramic views of the Caucasus Mountains, explore the area's many hiking trails, and learn about Svan culture by visiting the Svaneti Museum of History and Ethnography or exploring the region's historic churches and towers. Mestia offers a range of accommodation options, from guesthouses to luxury hotels, to suit every budget and preference.



While Mestia is easily accessible by road or air, there is still room for improvement in terms of transportation options within the region. For example, improving road conditions and adding more public transportation options could help visitors get around more easily and reduce congestion in the town center. Finally, a diversification of tourism offerings could include promoting cultural tourism, such as Svan cuisine and traditional crafts, or developing niche tourism markets such as wellness or gastronomy. As tourism continues to grow back to pre-pandemic visitor levels in Mestia, it's important to ensure that development is sustainable and respects the natural and cultural resources of the area. This could include measures such as limiting the number of visitors to sensitive areas, promoting responsible tourism practices, and investing in eco-friendly infrastructure..

Connecting Mestia to Lentekhi through improved infrastructure will create a new itinerary with a circular tourist trip/adventure, which can begin by following the Enguri valley to Ushguli and then continue through the Tskhenistkali valley, via Lentekhi, creating a single unique 7-day trip that is more diverse, informative, and comfortable for travel. This route is now used for a limited amount of tourists and local people in a specific “off-road trip” format, but it will be able to cover a considerably bigger segment in the future. This, together with the creation of new tourist destinations and activities in Kvemo Svaneti, will create conditions for tourists to this region to have long-term and experience-based vacations.

Lentekhi

Local Government Authority: [Lentekhi Municipal Council](#)

Nestled in the heart of the Caucasus Mountains, Lentekhi is a hidden gem waiting to be discovered. Visitors can explore ancient hike through pristine forests, and experience the warm hospitality of the local people. Lentekhi is an ideal destination for those seeking an authentic travel experience off the beaten path.

Lower Svaneti/Lentekhi municipality used to be home to two of the most popular mountaineering camps in the country during the Soviet Union - Zeskho and Ailama. These camps were crucial for educating hundreds of young people each year and producing elite “Soviet” alpinists. However, after the collapse of the Soviet Union, abandoned camps in the 1990s resulted in a drop in visitors. Restoring and developing these camps is vital not only for Lentekhi but also for the entire country. Tetri Utsnobi , Shavi Utsnobi , and Ailama are among the most famous peaks and would gain popularity once again among alpinists for professional guiding training and improving climbing skills. The Georgian government has contracted qualified firms to conduct technical and feasibility assessment of these opportunities aiming to bring private investors or establish public-private partnership in order to revitalize alpine camps and associated opportunities.

Lenteki town contains attractively situated remnants of the Lentekhi castle at its entrance, where the historic-ethnographic museum of Lentekhi is located. With the minimum expenditure required for conservation restoration, museum re-inventory, and arranging informative experience programs for visitors, this historic site linked to the town square can be made into the "visitors postcard" for the Lentekhi municipality.

Valleys as Destinations

When discussing "tourism destinations" in Svaneti, the document refers to valley areas - the homes of historic communities of Svaneti - rather than a single target point. Several valleys were identified as case examples of popular hiking/climbing multi-day adventure journeys. A similar tourist offering is successful in some of the valleys, such as Dolra valley, but in others the appropriate supporting infrastructure must be built. Individual target valleys such as Chuberi, Nakra, Fari, Becho, Mestia, Mulakhi, Kala, Adishi, and Ushguli are linked by historical trails, forming a unique network of the historic paths and new trails. This is how multi-day travel routes in Svaneti are developed, as opposed to the typical 2-3 day automobile excursions. Valleys, historically formed communities, and their linked "axial paths" should determine the destination areas of best tourist attraction in Svaneti. **Mapping and brief outline of specific valleys:**

Upper Svaneti

1. Chuberi valley - A mountain road connects Nakri valley and Chuberi valley
2. Nakri valley - A mountain road connects the Nakra valley to the Fari community, it is the section of the road between village Nakra - village Fari and Dolra valley - village Mazer through Bakhi pass
3. Dolra valley - There is a trail from Mazer to Dolra glacier and Mt. Ushbi plateau. The mountain path connecting to Mesti passes through the Church of the Archangel and passes through the Heart and Mestia
4. Mestiachala valley, Chalaadi, Lekhziri glaciers and the mountain trail connecting to Mulakhi community
5. Mulakhi community and the mountain road connecting with Adishi, Ifari and Kala communities; Tsaneri, Adishi and Khalde glaciers with corresponding valleys and Mt. Tetnuld
6. Kala-Khalde Glacier - Ushguli

7. Ushguli community and Shkhara glacier

8. Adishi, Adishi glacier and Mt. Tetnuldi approaches

Lower Svaneti

There are no marked trails or axial paths in Lower Svaneti, so connecting the below valleys to the eastern regions of Racha and Imereti should be addressed.

9. Kheleduri

10. Lentekhi

11. Choluri

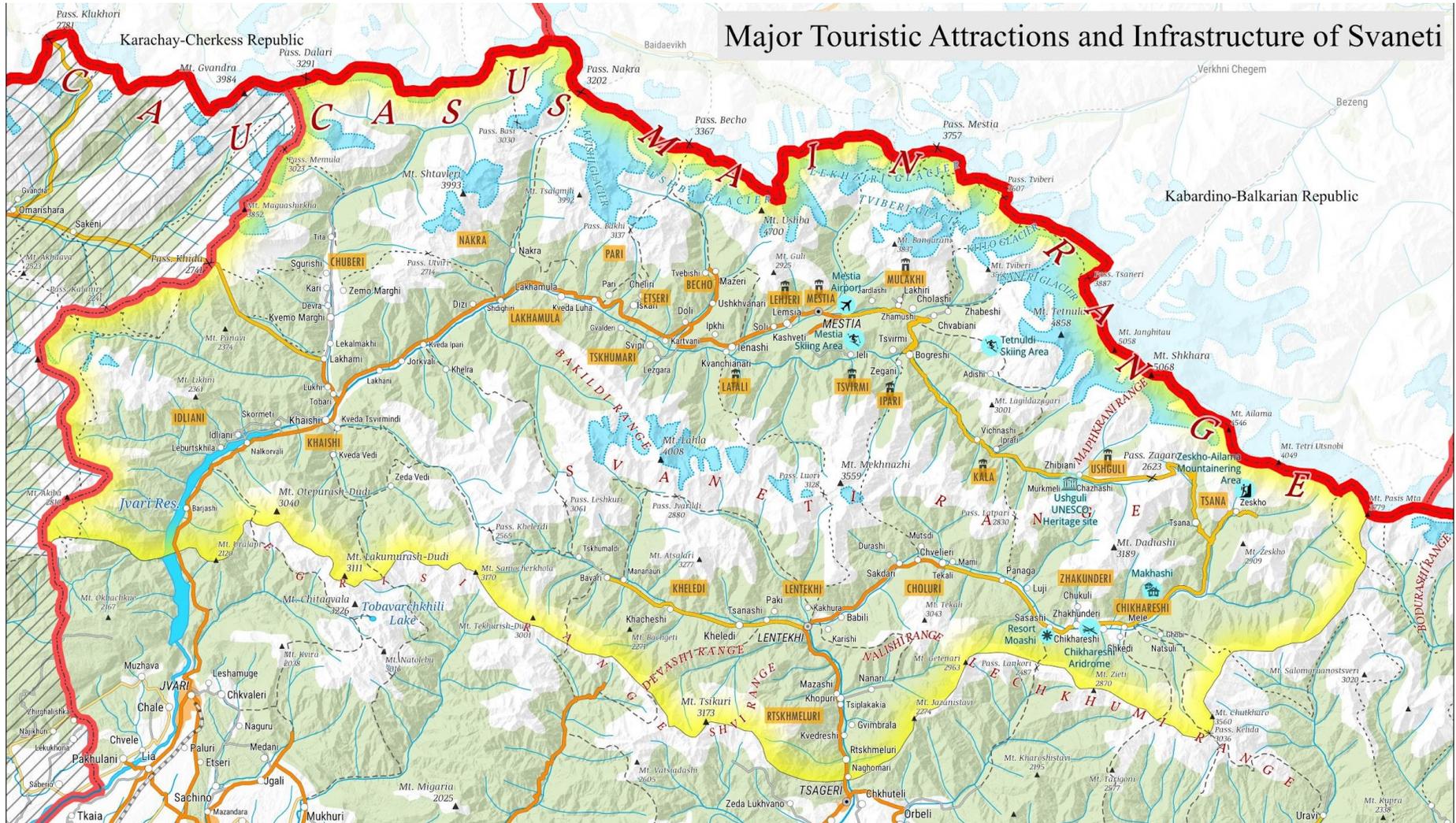
12. Zhakunderi

13. Chikhareshi

14. Ritskhmeluri

15. Tsana

Map 4: Valleys and Historical Communities in Svaneti





Case Study: Dolra Valley

The Dolra valley encompasses the villages of Dolasvif, Ushkhvanar, Becho, and Mazeri, which serves as the main tourist center. The valley is bordered by the Dolra river and the Dolra and Ushba glaciers. Mt. Ushba is an iconic highlight of the valley with myths and stories of mountaineering experiences. The main entrance to the valley is through the village of Becho, with a secondary entrance through the village of Dolasvif. The most popular route in the Dolra valley is the path along the river, leading to the Becho pass (unfortunately Becho pass which is located at the border of Russia is not walkable anymore). Several axial routes include the Bakhi Pass and trail Mazeri leading to Fari Temi and the Guli pass and mountain path leading to Mestia.

The Dolra valley offers many stunning natural attractions, including the Shkheldi (Shdugri) waterfall and the Ushba glacier (which are both highlights of the gorge trail), and the Gulis pass and lakes. Tourist activities include mountain- trekking, alpinism (difficulty categories up to 4a and 6b on Mt. Ushba and Mt. Mazeri), mountain-biking, horseback riding, and winter activities such as cross-country and cross-country skiing, ski mountaineering, and heli-skiing.

There are several shelters in the valley, including a hunter's hut at the start of the Shkheldi waterfall trail and farms at the start of the Becho pass trail. Several guest houses are located in the Becho community and in the village of Mazeri, where the Grand Hotel Ushba is also located.

Unique selling proposition: Mt. Ushba is the main draw, and a distinct feature. Excellent hosts and rustic hospitality make the visit extra special. For example, the popularity of the Grand Hotel Ushba in Mazeri is heavily influenced by its host.

Recommendations are to 1) restore the hunter's hut at the turn of the Shkheldi Waterfall route; 2) build a shelter and make minor improvements to the farms at the end of the valley; 3) create 2-3 camping and picnic areas at the valley's

entrance; 4) build a shelter-hut for climbers at the entrance to the Ushba glacier named as "At the Hunters' camp".

2.2.3 Packaging the Destination

Both upper and lower Svaneti are frequently included in multi-destination itineraries due to its geographical location. Families, friend groups, and corporate groups that commonly visit Svaneti for 3-5 days fall into this category. These "mainstream" groups account for half of visitors, whose itineraries are classified as easy to moderate in difficulty, and are not required to be physically strong or participate in specialized activities.

Table 4: Examples of how Svaneti is included as part of a larger travel itineraries popular in Georgia

Package Name	Destinations Included	Duration	Type of Travelers
Svaneti Adventure	Tbilisi, Mtskheta, Kazbegi, Mestia, Lentekhi	10 days	Adventure Seekers, Nature Lovers
Highlights of Georgia	Tbilisi-Kakheti-Kutaisi-Svaneti-Batumi	10 days	Families, Couples, Solo Travelers
Cultural Immersion	Tbilisi, Mtskheta, Uplistsikhe, Vardzia, Svaneti	8 days	History and Culture Enthusiasts
Mountains and Beaches	Tbilisi, Mestia, Batumi	7 days	Adventure Seekers, Nature Lovers
Winter Wonderland	Tbilisi, Kazbegi, Gudauri, Bakuriani, Svaneti	10 days	Ski and Snowboard Enthusiasts

The proportion of visitors who visit Svaneti as a stand-alone destination is small compared to the total number of international visitors. However, we can include groups interested in specific activities such as hiking, bike and horse trips, and rafting tours here. This is a new market with significant growth potential. The proportion of such visits is 30-35%. These trips range from moderate to advanced in difficulty and demand physical effort. Visitors seeking more extreme adventures, such as rock climbing, mountaineering, ski touring, heliskiing, and others, comprise another category. Their proportion is around 10-15% but these visits are considered as long stays. These groups require logistical support, various means of transport, as well as the services of guides, and are typically regarded as high-spending guests. The destination's efforts should be directed at attracting more high-value guests who engage in various activities and stay 7-10 days in a region.

2.2.4 Tourism Industry Performance and Seasonality

Accurate statistical data on tourists at the regional and municipal levels can be difficult to obtain. However, based on data provided by the Georgian National Tourism Administration and the local DMO, Mestia received 136,223 visitors in 2022, with a roughly equal distribution of local and international visitors. Racha-Lechkhumi and Kvemo Svaneti region had 7445 international visitors, with Lentekhi receiving approximately 1400 international visitors. The majority of travelers, about 90%, visit Upper Svaneti, with only 10% exploring Lower Svaneti. As such, it is critical to develop paths, roads, and transportation options connecting both regions for the continued growth of tourism in Svaneti and increasing the flow of visitors from upper to lower Svaneti once the interesting multi-day journeys, such as off-road, hiking, mountain biking, ski touring, and horse riding, are ready to offer.

Occupancy rates of Georgian hotels show a clear seasonal trend, with rates increasing during the summer season. The data based on the hotel sizes indicates that occupancy rates have been higher for large hotels than small and medium ones for the analyzed period, with average large hotel occupancy constituting 59% in 2022, while the same indicator is 42% for small and medium hotels.



Seasonality Patterns: Summer Season

During the summer season from May to October (with the peak season being July to August), cultural tours, trekking, horse riding, and rafting are among the popular activities. Around 70% of visitors come in the summer season, while the remaining 30% visit during winter, consistent with other mountain regions like Tyrol in Austria. Visitors travel mainly to Upper Svaneti, as this is where the majority of services are developed.

Summer in Svaneti is a season of stunning natural beauty, rich cultural heritage, and outdoor adventure. With comfortable temperatures and long days, the season offers vibrant green landscapes, blooming wildflowers, and snow-capped peaks in the distance, making it perfect for hiking, trekking, and exploring the trails and mountain passes in the area. Visitors can also indulge in the local culture by attending traditional festivals and events or relaxing in natural hot springs or mountain streams. However, Svaneti is still a relatively rural and remote region, which can lead to some infrastructure challenges during the summer months, such as limited transportation options and occasional power outages. It's important for unknowing international visitors to be prepared for potential unpredictable weather changes, such as thunderstorms or unexpected cold snaps.



Seasonality Patterns: Winter Season

The winter season from December to April attracts skiers for traditional ski vacations, but also a growing segment of ski touring, freeride, and heli-ski touring. In fact, Mestia hosted qualifying competitions of the Freeride World Tour (FWT) in 2022-2023, received outstanding feedback, and planned to hold the FWT challenge in 2024 as well as the FWT competition in coming years

Winter in Svaneti is a season of unparalleled natural beauty and exhilarating outdoor activities. As the snow falls and the landscape transforms into a winter wonderland, visitors can enjoy a range of winter sports, including skiing, snowboarding, and Mestia's ski resort Hatsvali offers a variety of ski runs suitable for all levels, as well as stunning views of the surrounding mountains. For those seeking a more adventurous experience, heli-skiing is available for a truly unique experience. After a day on the slopes, visitors can cozy up by a warm fire and enjoy traditional Georgian cuisine and hospitality in one of the region's many guesthouses or hotels. Winter is also a great time to explore the area's historic sites and cultural heritage, with fewer crowds and a more intimate atmosphere.

With temperatures often dropping below freezing, shorter days limit the amount of time available for outdoor activities and sightseeing. Some of the smaller villages and attractions in Svaneti may be inaccessible during the winter due to heavy snowfall, road closures, or limited transportation options. Visitors should be prepared for snowy and icy conditions, make sure to dress appropriately, and check in advance to ensure that their planned activities and destinations will be open and accessible during their trip.

Efforts to Improve Seasonality

In order to maintain economic stability, diverse activities and events are used to "attract" tourist flows during low or transitional seasons. These times are April through May and October through November.

The Mestia DMO, the municipality authority and local businesses are working to develop more shoulder-season offerings, such as winter festivals, cultural events, and culinary experiences, in order to encourage visitors to come during the quieter months. The best ways to draw tourists are to hold a variety of events, such as a film festival, ski tour races or a mountain runners marathon, different sporting festivals and professional contests, traditional opening and closing events of the season that could be blended with the cultural events and festivals, etc. Additionally, some tour operators and travel companies are offering discounted rates and special packages for off-season travel in order to incentivize more visitors to come during these times.

Overall, these efforts to extend the seasons in Svaneti are aimed at spreading out tourism demand and reducing the negative impacts of overcrowding during peak season. By encouraging visitors to come during the quieter months, it not only helps to alleviate some of the negative impacts of tourism but also supports the local economy throughout the year.

International examples actively working to revive the passive seasons:

Solden, one of the most popular ski resorts in Austria, has been a regular host of the FIS (International Ski Federation) World Cup season opener, which includes the first downhill ski race of the season. The FIS World Cup race in Solden is considered one of the most important events in the ski racing calendar, as it marks the beginning of the competitive season and sets the tone for the rest of the year. The race attracts some of the top skiers from around the world, who compete for valuable points and prize money. In addition, in the month of April, Solden hosts a winter season-closing Snow Festival in April each year, which is a popular event for skiers and snowboarders. Example - The festival "Hanibal" usually takes place over the course of a weekend and includes a variety of activities and events, both on and off the slopes.

Another example from **South Tirol** - The Dolomitenmann is a unique event that combines four different disciplines: trail running, mountain biking, kayaking, and paragliding. The race course is set in the beautiful mountainous terrain around Lienz, and the competition is known for its challenging and technical nature. The event attracts top athletes from around the world and is considered one of the most prestigious extreme sports competitions in Europe.

Similar to these events, there are already established practices to host similar sports events in Georgia/Kazbegi, such as Mt.Kazbegi Marathon, GergetiT or "Vardzia challenge".

2.2.5 Attractions & Recreation Activities

This section provides an inventory and analysis of the various tangible and intangible attractions and activities of the Svaneti region, a critical factor in demand. It is an evaluation of current winter and summer seasons tourism attractions, products, points of interest, services, and events in Upper and Lower Svaneti.

Cultural Heritage Monuments

Due to its more remote geography, Svaneti has been able to preserve its historical identity and has become a unique destination. This is expressed in traditions, urban planning, tangible and intangible cultural heritage monuments. Experiencing this rich culture is a highlight and main draw for tourism, so mapping out, developing, promoting and preserving these experiences is a priority.

Svaneti is renowned for its 608 immovable monuments of cultural heritage, including over 100 churches and monasteries housing more than 1300 cultural heritage objects, with many small hall churches containing Georgian art treasures such as painted icons and illuminated manuscripts, goldsmithing, wall paintings, and wood carvings crafted by Svan masters. It is home to approximately 200 towers, which were primarily constructed for defense purposes. Each clan in Svaneti had its own tower, which was built with the assistance of the entire village and community. The region is adorned with two-story whitewashed old residential houses that stand beside the towers.

Svaneti is also exceptionally rich in intangible cultural heritage, including unique rituals related to pagan beliefs and customs that coexist with Christianity. These rituals and celebrations are of significant interest and value from the perspective of tourism. Rituals like "Lamproba", "Kanda", "Lichanishoba" in the village of Adish, and "Lifane" (a holiday related to the mention of the souls of the dead) are particularly noteworthy. The region boasts a rich musical folklore that includes the hymns of the sun and dawn, heroic and humorous songs, and a unique type of mourning song called "Zari" which is performed exclusively by men and has been preserved to this day. There is a strong sense of community reflected in the dense settlement of their villages, with agriculture being the main branch of livelihood, particularly cattle breeding and grain farming. The Svans are also known for their black, white and gray woolen hats and scarves, adding to the list of locally-crafted, artisan goods and souvenirs available for purchase.

The Svaneti Museum of History and Ethnography is located near the village of Mestia, a 6-minute drive from Queen Tamar Airport. It houses more than 4,000 items including archaeological objects, engraved and painted icons, religious objects, weapons, wooden ethnography, costuming, textiles, and more. It is open every day except Monday from 10.00 to 18.00 and the entry fee is 7 GEL for adults or 10 GEL for a guided tour. Schoolchildren and student tickets are 0.5 and 1 GEL, respectively. Free admission is granted to children up to age of 6.

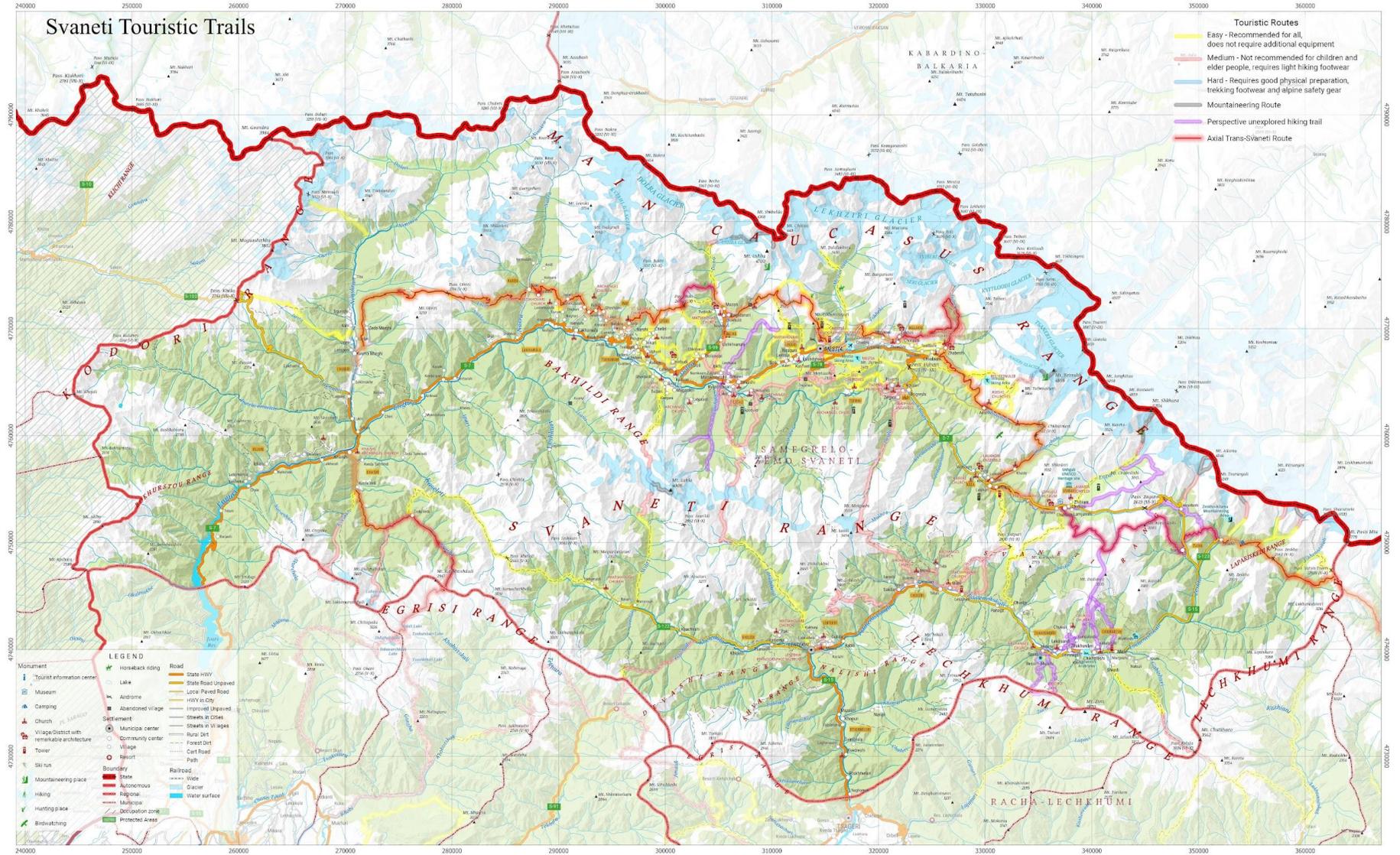
Hiking Trails and Huts

Once in the region, the best way to explore is by foot, as many of the sights and attractions are located in remote areas that are only accessible on foot or by horseback. Over 40 hiking trails are well-marked, and visitors can hire local guides for a more immersive experience.

Despite the widespread interest in Svaneti's distinctive nature, ordinary travel excursions are severely constrained in terms of time, location, and sight-seeing options. The flow of visitors to Georgia has increased dramatically in this category of tourism (mainstream). For those looking for a typical travel itinerary, Svaneti offers a popular 3-4 day trip to the Zugdidi-Mestia-Ushguli-Mestia-Zugdidi loop. However, there's a need to create variety by integrating new and off-the-beaten-path destinations. The town of Lentekhi in the Lentekhi municipality is an attractive alternative, but needs to be developed due to its lack of tourism amenities and infrastructure.

Active vacation enthusiasts can plan a relatively easy 5-6 day trip to Svaneti for hiking, biking, and horseback riding along the popular Dolra, Nakra, Bakh Pass, Mestia-Mulakhi, Adishi, and the panoramic Zuruldi mountain trails. More experienced travelers looking for high-risk adventure activities such as mountaineering, mountain trekking, or glacier crossing can opt for tours lasting 7-10 days that require the services of local guides, logistical support, transportation, and overnight accommodations. Popular routes include Ushba, Shkhara, and Tetnuldi, with Laila and other peaks in the Svaneti range predicted to be more popular in the future.

Map 5: Tourist Routes and Trails





Ski-lift Areas, Ski-touring Routes, Freeride and Heli-Skiing Zones

Ski centers and areas are the driving force of winter tourism in Svaneti. Hatsvali and Tetnuldi ski areas are located in the municipality of Mestia. The Mountain Trails Agency (state-owned) owns both ropeway systems, which are administered by the company's management.

Hatsvali mountain has two modern cable cars (plus two smaller cable cars for beginners) and a 7-kilometer skiing area. The lifts have a capacity of 1200 skiers per hour. Tetnuldi mountain has five contemporary cable cars and a 12-kilometer ski path. The lifts have a capacity of 2500 skiers per hour. Both ski resorts provide snowboarding, night skiing, heliskiing, freeriding, winter hiking, and ski touring in addition to skiing.

Lentekhi municipality currently lacks a cable car. A preliminary survey has been completed, and a concept for the use of ski slopes on the Lentekhi-Rachi dividing ridges has been produced (Geographic LLC). Currently by request of MTA, the French company CDA (Company Des Alpes) is conducting a feasibility study to assess opportunities to establish a large ski-resort on the north-north/west slopes of Mt. Chutkharo, located between Lentekhi and Oni municipalities.

Every year, the ski season usually begins on December 15th and concludes on April 15th. During this time, visitors come to Mestia for 3 - 6 days to ski. The majority of them are regular skiers drawn not only by the mountain and beautiful snow, but because it is uncrowded and inexpensive, especially when compared to other European ski resorts. A one-day cable car pass in Mestia, for example, costs 40 GEL (15 EUR), whereas a day pass in Tyrol (Austria) costs between 50 and 100 EUR or sometimes even higher.

Given the capacity (skier per hour) of ropeways, the load factor currently is low and is estimated to be 15-20% of maximum capacity. For example, an estimated 41,100 people visited Svaneti during the winter season of 2021-2022, and half a million visited Gudauri during the same period. Therefore, existing lift capacities are not utilized by far and the resources for developing Svaneti's winter season are significant. This is demonstrated by the major increase in the number of skiers visiting the region, soaring from 16,269 in the 2016-2017 season to 53,187 in the 2019-2020 season. This represents a three-fold increase in just three years, highlighting the appeal of Mestia's ski resorts.

An important feature of the winter season is that potential visitors are high-spending visitors with special interests and skills, who are often interested in exclusive offers along with the standard of service. One such popular activity is heli-skiing (heli-skiing and gliding down unmarked slopes), which involves skiing on untouched snow in remote and rugged terrain, is an activity that appeals to experienced skiers and adrenaline seekers. This is demonstrated by the long-standing practice of heliski operating and the increasing demand in Georgia. The Swiss firm "Alpinetravel" began operations in Gudauri in 1990. In 2005-2006, the first heliski operator international firms appeared in Svaneti (operated by German company). Despite high competition, numerous operator businesses are now effectively operating in the European market, selling approximately 300 one-week heliski packages each year at prices ranging from 3000 to 4000 euros. Relatively new and low-budget tours are combined heliski, freeski and/or ski tour. This is a particularly interesting proposal for the positioning of Svaneti, and may include both Upper and Lower Svaneti (for example, the western/northwestern slopes of Mt. Chutkharo). In Zemo Svaneti, similar tours are especially popular around the Tetnuldi mountain, the slopes upper the Ushguli village and around Shkhara mountain. It should be highlighted that attracting such tourists would increase the share of so-called low-cost tours; nonetheless, it is critical that efforts and marketing activities are aimed at drawing high-end visitors. First and foremost, the effort entails the development of services that are especially important for the growth of adventure/extreme tourism in Svaneti and the entire mountainous regions of Georgia, such as a medical air service and a rapid response mountain rescue service staffed by certified mountain guides/rescuers and equipped with a rescue helicopter based in Mestia.

Whitewater Rafting and River Adventures

Tskhenistkali River is known for its highly-diverse, unique rapids and eddies. It hosts several rafting tours on distinct sections of the river from Lentekhi to Tsageri (15-20 km from Lentekhi to Tsageri Reservoir) which give visitors unforgettable experiences. The difficulty of the first rafting route is: category III in the spring - there is a fast and strong current, rapids and eddies; category II in the summer - the flow is less fast, there are small boulders and rapids. There is also a more difficult category IV rafting course with fast, powerful currents, rapids, pits, stoppers, and stones. In addition, the fishing season runs from spring to summer. It should be emphasized that the Tskhenistkali river not only flows through Kvemo Svaneti, but also through Tsageri and Khoni municipalities. Kvemo Svaneti could be a particularly alluring tourist destination for those who enjoy multi-day river rafting and kayaking.

2.2.6 Accommodation and Visitor Services

The regional analysis of the accommodation supply shows that in December 2022, the largest number of accommodation units were registered in the Samegrelo-Zemo Svaneti region, with its share constituting 19% of the total units in the country. However, the regional share distribution significantly shifts when analyzed in terms of number of rooms or beds offered, indicating that Samegrelo-Zemo Svaneti has many hotels with a small number of rooms and bed-places. The lodging units in the region are mostly family guest houses. The average number of beds to a room shows a similar picture for all regions, with every unit having 2 or 3 beds.

The scenario is rather different in the cases of Racha-Lechkhumi and Kvemo Svaneti. This region accounts for only 3% of all registered overnight spots in the country. Lentekhi municipality has 1 hotel and 22 family-type hotels. The hotel, 9 family-style hotels and one cottage-style hotel are all in Lentekhi town and the majority of visitors to the municipality stay in these hotels. There are 13 family-style motels dispersed around the municipality. In this region, the average number of rooms in family hotels is 7, as compared to Samegrelo-Zemo Svaneti where the average is 6 rooms. In Racha-Lechkhumi and Lower Svaneti, there are 20 beds, while in Samegrelo-Zemo Svaneti, there are 16. But the number of beds increased by nearly 2000 in the Samegrelo-Zemo Svaneti area between 2020 and 2022, whereas it almost did not change in Kvemo Svaneti, indicating that the region needs to take substantial steps in terms of tourism growth.

There are approximately 130-150 housing facilities (mostly small hotels or family guesthouses) in Mestia, with up to 900 rooms and 2000 beds. Racha-Lechkhumi and Kvemo Svaneti have about 30 lodgings, 200 rooms, and 600 beds registered.

The increase in the number of family hotels is typical for all tourist destinations in Georgia, and it is likely to continue over the next five years. New guest homes are actively being built in the Mestia municipality, often in violation of the permit regime, especially in severe protection zones for historical and architectural heritage. The villages of the Ushguli community are a good example of this, with the state announcing a memorandum of temporary construction ban. It is critical that the issue of construction be closely handled; otherwise, a certain historical site may lose its cultural and tourism attractiveness.

National Statistics	
Average Beds to Room:	Most common lodging type:
2 - 3	small hotels & family guest houses

	Samegrelo-Zemo Svaneti Region	Racha-Lechkhumi and Kvemo-Svaneti
National Accommodation Supply Share:	19%	3%
Average Number of Rooms in Family Hotels:	6	7
Average Number of Beds 2020-2022:	increased by nearly 2,000	little to no increase

	Mestia	Lentekhi
Lodgings:	130-150	30
Rooms:	900	200
Beds:	2000	600

Hotels

There is not a single branded hotel in the municipalities of Mestia and Lentekhi. The hotels "Posta" and "Gistola" have 4-star ratings (according to acceptable standards). Those are most likely the two best in terms of facilities. Many others, such as Hotel Paliani, Lahili, Old House, Mestia Inn, Golden Tower, Banguriani, Chalet Mestia, and others, are mid-size hotels with 20 to 40 rooms that are quite good and well-hosted. These hotels, as well as many others, can be found on booking.com and Airbnb. In the case of Lentekhi, such a hotel was "Svaneti," which is now closed. The Horeca Association recognizes only four family hotels in Mestia as Eurostar 2 and 3-star.

During peak season, the quantity of high-quality lodgings is minimal; also, during peak season, winter and summer are typically fully occupied. That is to say, high-quality infrastructure and services must satisfy international standards, and such facilities are in high demand.

Svaneti companies benefit from the status of a high-mountain settlement and other advantages to attract investments. Such companies, for example, are tax exempt (exemption from property tax for a specified period, subsidized loans with Enterprise Georgia co-financing), and people do not pay land tax. Furthermore, local resident employees working in the hospitality industry in Mestia and Lentekhi are exempt from income tax when their annual revenue is less than 6000 GEL.

In addition, unlike Lentekhi locals, Mestia municipality residents who own guest homes (or family-run small hotels that are not recognized as hotels) frequently do not pay their power and water bills using commercial pricing. Mestia and Lentekhi have no gas delivery system. As a result, households and hotel operators are heating with electricity or traditional wood fires. This is a challenge that needs to be addressed by the national stakeholders.

Guesthouses and Homestays

The majority of the places to stay in the area are mid-size hotels or small family run hotels/guesthouses. There are approximately 18 guesthouses registered on Airbnb in Racha-Leckhumi and Lower Svaneti, and hundreds more in Upper Svaneti. It is crucial to note that the quality of services in such family hotels frequently do not correspond to international standards. To begin with, these places necessitate personnel training in hotel management, service staff certification, and the development of architectural guidelines, design and traditional aesthetics education, which ensures the preservation of the traditional appearance and the enforcement of urban planning law. Unfortunately, unregulated development is occurring in tourist locations of significant importance, permanently altering the appearance of the historic environment and undermining its major values.

Mountain Huts and Campsites

When discussing mountain huts, it is critical to consider the “Hut-Trail-Guide-Rescue” concept, which entails developing a competitive outdoor adventure tourism product. A trail alone might not be considered a tourism product if it does not suit basic necessities, such as providing a place to stay like a campsite, hut, cottage, or even a family hotel during a multi-day hike, or having an operator or outfitter to provide equipment like tents or other gear. In this regard, all of the paths along which the routes are followed require such infrastructure. These kinds of services are lacking in both the municipalities of Lentekhi and Mestia, although some progress is visible along the most popular hiking routes in Mestia, but not in Lentekhi.

As an example, we can take the practice of creating and operating a network of mountain huts in the Alps. Although often there is external investment in the construction of the huts (made by alpine associations, professional unions or commercial investors), the operation and maintenance is delegated to the local operator/commissioner, providing employment opportunities. The scheme is often very simple - the owner of the property gives the property to the operator on the following terms: the income from overnight stays belongs to the owner (that covers maintenance and reinvestment too), and the income from food and other services belongs to the operator.

2.2.7 Support Services, Infrastructure and Municipal service

Tourist Information Center

The Mestia (Svaneti) tourism information center was established in the center of Mestia (Seti square) in 2010–2011, during the completion of the Mestia township rehabilitation project, as part of the collaboration between the Mestia Municipality and the Georgian Tourism Administration. The information center's goal was to inform tourists about the attractions and services available in their community. The "Information Center" collaborated with other information centers in the Georgian tourism industry's united network to carry out visitor registration, statistics, surveys, and other studies. This experience served as the foundation for the local DMO's establishment and subsequent functioning in accordance with the new tasks. It is crucial that a center of this kind first exists in Mestia and then, with the growth of numerous tourist attractions, in Lentekhi as well.

Food/Beverage Facilities

Svaneti boasts a unique gastronomy, with locally produced and preserved agricultural products despite the region's scarcity. Mestia is home to several popular cafes, with at least one or two constantly bustling, providing a foundation for expanding the network beyond the town. It would be ideal to see family-owned restaurants established in nearby villages such as Nakra valley, Becho valley, Mulakhi, and Kala, offering visitors a diverse and experience-based culinary masterclasses or tours. Lentekhi offers a single cafe and three bakery-style facilities that specialize in traditional Svan kubdar and khachapuri. The owners of the guest houses generally host and prepare meals for their visitors.

The issue of food safety is critical, especially given the small-scale operations of family restaurants. Approaches compatible with small family guesthouses must be developed to ensure food safety, not just in Svaneti but across Georgia. Tetnuldi College in Mestia offers training for cooks and confectioners, but it is crucial that the curriculum also emphasizes hygiene and sanitation in accordance with HACCP standards. How to incorporate HACCP standards into family-run catering operations is a significant difficulty that must be addressed before rules become a necessary obligation for operators.

Gear Rentals & Outfitters

The expansion of ski services has given rise to the demand for the development of ski inventory and ski rent shops. There are around 10-15 in Mestia and mostly satisfy the visitor demand. As for travel gear during the summer season, several guide associations offer such items to visitors. These services are available only in Mestia, and it is desirable that the network be developed in the most popular valleys of Mestia and Lentekhi.

General Infrastructure and Municipal/Public Services

This section includes an analysis and evaluation of relevant general infrastructure (roads, water supply, wastewater and other waste management, electricity supply, urban/rural zoning, banking, emergency and medical services) and the other basic services not already covered in previous sections that a visitor might need while traveling in Upper and Lower Svaneti.

Energy Supply

Svaneti is a region rich in hydro energy resources, and it is home to the main energy generation facility of the Enguri HPP. However, due to the exemption of the population from electricity tax and the non-recording of electricity consumption at the household level, it is challenging to provide high-quality energy supply in conditions of increased energy consumption. This is a significant challenge for the region, particularly as the development of tourism is set to increase the demand for electricity. In Mestia, only enterprises pay the fixed-rate commercial tax, while many accommodation facilities, such as guesthouses, avoid paying the electricity tariffs that are meant for commercial purposes. This situation needs to be addressed to ensure sustainable and reliable energy supply in the region.

The development of tourism in Svaneti presents an enormous opportunity for the region's economy, but it also poses significant challenges. The increase in electricity consumption resulting from tourism development must be reflected in the electricity bill, as without it, energy companies will be reluctant to invest in the necessary infrastructure to meet the growing demand. There is a need for a regulatory framework that ensures fair and transparent pricing for electricity consumption, including for commercial purposes. This framework should ensure that all businesses operating in the region, including guesthouses and other accommodation facilities, pay the appropriate electricity tariffs, enabling energy companies to invest in the necessary infrastructure and ensure reliable energy supply for the region's sustainable development.

Moreover, Mestia municipality's sustainable energy supply is unstable due to challenges with high-voltage line operation (particularly in winter) and outdated transmission lines. The number of transformers in high-to-low transmission substations needs to be updated due to a significant increase in electrical consumption, from ten to a hundred times in some locations, resulting in frequent breakdowns and low voltage supply of users, which prevents the private sector's sustainable development, damages equipment, and so on.

To solve the energy supply problem in the region, it is crucial to take a comprehensive approach that includes multiple solutions:

- improving the existing energy supply networks to ensure that the current infrastructure is functioning effectively.
- generating energy locally through medium and small-sized hydroelectric power plants that will increase the region's energy self-sufficiency.

- exploring renewable energy options, such as solar or wind power, for municipal buildings, domestic needs, and private businesses that will reduce the dependence on traditional energy sources. However, the fact that the installation of wind and solar power facilities can cause damage to high mountain towns should be considered here, and such projects should be undertaken only after thorough analysis.
- arranging for natural heating gas supply in the region will reduce the consumption of electricity. The capital cost of establishing hundreds of kilometers of gas supply, on the other hand, is extremely expensive, and the justification of this investment should be considered based on the return on investment method.

As for the Lentekhi Municipality, one of the most pressing issues is that the center of the municipality is solely dependent on one power source. This means that in case of any damage, Lentekhi town and surrounding villages have a shortage of electricity supply. To address this problem, Lentekhi should be connected with the high voltage transmission line to the Jakhunderi substation. This line had been operational during the Soviet era and only needed restoration to become functional again. By doing this, the center of the municipality would not depend on a single power source.

Another issue is that the villages of Tsana and Zeskho are not supplied with electricity at all. While these villages only have about 15 permanent households, their location has significant potential for tourist development. The construction of a mini power plant would supply these villages with electricity. This would not only improve the living conditions for the residents but also open up opportunities for tourism development in the area. Finally, the arrangement of natural gas supply in the municipality is crucial to enhance the living standards in the region.

Road Infrastructure

The municipal roads in Mestia face several problems. Firstly, the scattered location of the villages affects the length of the roads and the number of bridges required. Additionally, the roads run alongside streams and rivers of various capacities, which have large water catchment basins that negatively impact the roads and bridges. Furthermore, the absence of roadside culverts and protective barriers poses a significant risk to road users. For instance, the Dizi-Etseri section on the Jvari-Mestia section is fully amortized despite being built in 2010. This is due to the desire of low-cost project implementation and not sufficient regular maintenance that require significant investment from the central budget (when the category of the road is “state road”).

The state road to Lentekhi is in very good condition. It was recently constructed and connects Lentekhi municipality to Tsageri and Ambrolauri municipalities. However, the rugged mountainous terrain of the Lentekhi municipality has made it difficult to maintain the agricultural dirt roads leading to the mountains and mow pastures. Villages are scattered in highland valleys, which have a negative impact on the length of the roads due to the number of bridges and retaining structures needed. The presence of streams and rivers of various capacities flowing along the length of the roads exacerbates the issue, as they have large water catchment basins that cause damage to roads and bridges during heavy rains. Additionally, natural events such as heavy snow, avalanches, landslides, and torrents require almost permanent maintenance and restoration works. As a result of the unfavorable conditions, the lack and poor condition of municipal/village roads have a significant impact on the economic activities of the population, and are the main reason for the depopulation of villages.

The region of Upper and Lower Svaneti has significant potential for tourism development, and therefore, high-quality roads that are safe and operable in all seasons are an urgent necessity. In order to achieve this goal, there needs to be an overall increase in the design and construction standards of the roads in the region. Additionally, construction of the Kala-Ushguli-Tsana section with a high-quality concrete pavement would provide a bypass and alternative connection to the region. Finally, in the long-term perspective, construction of a tunnel connecting Upper and Lower Svaneti would be a significant solution to the road problems in the region. These solutions would not only improve the living conditions of the local population but also boost the tourism industry in the region.

Transport

Mestia airport faces a number of problems, including small capacity on board, low frequency of flights due to weather-related conditions, and a reputation for unreliable transportation services. The solution to these problems is to invest in the airport's infrastructure and air navigation equipment to ensure that it can operate in all weather conditions. This includes installing a navigation system that allows for safer and more reliable flights. Another solution is to appoint bigger capacity aircraft that can transport more passengers and cargo, thereby increasing the number of shipments. The feasibility study for the construction of a new or expanded terminal at Mestia airport has been deemed a national government priority for the next few years.

In addition, it is important to adjust the pricing strategy to attract more tourists and ensure that the airport's operations are financially sustainable. This could involve offering competitive prices to tourists while still providing subsidies to the local population. In the long term, the airport should work towards increasing the number of passengers and promoting Mestia as a tourist destination, which will ultimately lead to more demand for flights and more economic opportunities for the region.

In terms of auto transport, Mestia municipality does not have public transport (Municipalities are not allowed to plan shipping routes in another municipality). This field is entirely at the disposal of the private sector. Internal transportation in the municipality is carried out only by hired transport, both for local and visitors. In 2023, Mestia municipality is planning to purchase a small bus for a Mestia-Lenjeri circular line.

The development of public transportation of the municipality depends a lot on road availability and quality and availability of comfortable bus stations in Mestia.

Lentekhi Municipality is also facing a similar problem as the absence of internal public transport reduces the flexibility of regular movement for the population, presenting an obstacle to public life for people of all ages, including tourists. Additionally, the lack of an airport and air flights hinder sustainable communication of the region throughout the country, and have a negative impact on the development of tourism in the area. It's worth noting that in 2005, American Black&Weatch prepared the Design-Built RFP documentation for the Chikhareshi grass airfield under the US Customs Service and US Army Corps of Engineers, based on a detailed site and operational study with the participation of CCG experts. This documentation is still available and could present an opportunity for the future.

Water Supply and Sanitation

The Mestia municipality faces various problems related to water supply and wastewater management. One of the biggest challenges is the limited revenue available for investment programs, which has resulted in incomplete modernization of water supply infrastructure. Certain villages also face a significant increase in water demand, which requires construction of water mains from distant sources, increasing investment costs. In addition, there is a lack of drinking water control system and absence of irrigation systems, which negatively affects agricultural crops' quantity and quality.

To address these problems, the implementation of a feasibility study on the municipal level for rural and semi-rural water and wastewater supply, similar to the one funded by KfW in Ajara AR in 2017-2018, would be helpful. The study should focus on developing a comprehensive plan for improving water supply infrastructure, including construction of water mains, implementation of a drinking water control system, and installation of irrigation systems to enhance crop production. Such measures will not only address the current water-related challenges but also pave the way for sustainable and efficient use of water resources in the future.

The availability of integrated Water Supply Systems (WSS) is limited to only Lentekhi town, where treatment and chlorination of potable water are provided. However, due to the gravitation characteristics of the system, the third and fourth floors of buildings are not supplied with water, resulting in residents installing individual water pumps. Additionally, water supply to users during winter is provided on a schedule, highlighting the need for a new water system. An electronic tender for this system was announced in 2022.

Water supply systems in villages are arranged by blocks, with no unified water treatment system in any village. Professional treatment and chlorination are not provided, and revenues of the municipality do not provide adequate investment for construction of modern WSS. Moreover, certain villages lack historically available water sources, and constructing water mains from farther locations is required, leading to an increase in investment costs. The sanitation system is also lacking, with waste water flowing into rivers in Lentekhi town without a septic tank. The sewage system is only available in separate blocks of two villages, Tsanashi (Bendashi district) and Laskadura (Kvitskri district).

Restroom Facilities

The absence of restrooms in Svaneti has emerged as a major worry for the region's tourism development. Visitors' comfort and convenience are jeopardized due to a lack of restroom facilities. This is especially noticeable in the Hatsvali and Tetnuldi ski resorts, where there's a lack of clean and accessible toilets. Local governments and stakeholders must address this issue by investing in the construction of adequate and well-maintained toilet facilities throughout the region.

Waste Management

In Mestia municipality, garbage disposal and street cleaning are under the municipal services and are properly functioning. A major issue is garbage disposal particularly in villages with poor road infrastructure and the lack of suitable equipment. As a result, several territorial units within the municipality lack garbage containers, which hinders the cleanliness of the area. To address this issue, it is crucial to improve the road infrastructure throughout the municipality, arrange waste collection containers and transportation of the collected waste to the temporary sorting station or permanent dump site. Arrangement of the solid waste (non-hazardous) dump site is an issue to be addressed and agreed between municipalities and national Solid Waste Management Company. Additionally, providing better equipment and staff training can help ensure efficient waste management services.

Similarly, in Lentekhi municipality, garbage collection and removal services are currently only available in 17 villages along the central paved road, with the remaining 43 villages lacking this service due to inadequate road infrastructure. Garbage containers are placed on the main road in these areas, and the lack of sufficient containers and off-road open-board self-loading trucks is another problem. To improve waste management in Lentekhi municipality, it is necessary to improve access roads in villages and procure waste management machinery

and equipment. With better infrastructure and equipment, efficient garbage collection and removal services can be provided in all villages within the municipality, resulting in a cleaner and more livable environment for residents and visitors alike.

Urban Planning of historic settlements and immovable monuments of Cultural Heritage

Mestia municipality already has special development plan and urban development regulations for Mestia and Mulakhi communities (plan is elaborated by LLC “Geographic” on request of the Ministry of Regional Development and Infrastructure, 2018-2019). Spatial Urban development plan for the Ushguli municipality is also ready and submitted for the comments and recommendations to UNESCO (as Ushguli community is UNESCO WHS). However, in the municipality of Mestia, ongoing constructions with violations threaten the preservation of cultural heritage and natural landscapes, as well as the safety and well-being of locals and tourists. The enforcement of regulations and monitoring of construction activities needs to be stricter. On the other hand, in Lentekhi municipality, the absence of urban planning documents obstructs tourism development and public space improvement. The municipality needs to prioritize the creation and implementation of an effective urban planning framework that takes into account the needs of the community.

To achieve a high architectural appearance of settlements in the region, a complex approach is required that includes studies on the state of cultural heritage objects, methodological directions for restoration-revitalization of heritage sites, and qualified architectural supervision of construction. Without such comprehensive planning, arbitrary urbanization may lead to negative architectural outcomes that are difficult to correct in the future. The lack of complete and legally valid planning documentation in many settlements in the region has resulted in spontaneous and accidental urbanization that is not in line with the state's intentions for development. Immediate solutions include the central government taking action to implement complex administration strategies that involve self-governments.

The Lentekhi municipality should prioritize the significant heritage sites in the area, particularly the historical village of Makhashi. This village has the potential to become a regional hub for historical and tourism development, connecting Upper and Lower Svaneti and Racha regions. The restoration of Makhashi and the development of the surrounding areas could bring significant economic benefits to the municipality, as well as promote cultural and historical awareness.

Natural Hazards Risk Mitigation and Response

In the municipality of Mestia, it is crucial to prioritize the study of local natural hazards to ensure the safety of the local population and promote sustainable development in the region. The monitoring of active geological processes, such as rockfall on specific road sections, and the installation of warning systems are necessary preventive measures. By studying the natural hazards specific to the area, the municipality can develop effective strategies to mitigate their impact, and better prepare for potential disasters.

Lentekhi municipality faces natural disasters every year, including frequent floods, mudslides, landslides, and heavy snowfall. These natural disasters often result in villages being cut off from the outside world, making it difficult for the local population to access resources and emergency assistance. Moreover, climate change has led to an increase in the frequency of natural disasters such as glacier melting, erosion, floods, and landslides. To tackle this issue, the municipality needs to prioritize the study of local natural hazards and develop preventive measures such as river bank protection, arrangement of storm water spillways in critical road sections, and availability of special equipment to enable all communities to remove snow and respond independently during natural disasters. By doing so, the municipality can ensure the safety and well-being of its residents and promote sustainable tourism development.

Medical and Rescue Services

Mestia municipality has one hospital, 14 ambulatory clinics, the Chuberi-Ushguli ambulatory association, a public health centre, and an emergency medical centre. Mestia is served by two ambulance companies, each with an upgraded parking lot.

In the town of Lentekhi, there is a hospital that only provides outpatient services. Small ambulatory clinics operate in many towns, primarily providing first aid to patients. The municipality also has an emergency medical service.

Outpatient facilities are in disrepair, making it impossible to receive adequate medical care. There is also a shortage of medical personnel.

There is no mountain rescue service in any municipality, which makes mountain tourism development difficult. It is critical not only to save lives, but also to the growth of the business, as it is related to travel insurance (fulfillment of the terms provided by this insurance) and thus reputational hazards. The solution to the problem of a lack of such services is public-private collaboration, though operation may be economically profitable in the long run. This necessitates the presence of a rescue helicopter, a small team of qualified rescuers, and an initial budget for emergency rescue operations.

Georgia has a constitutional obligation to provide assistance to the population and conduct rescue operations in the event of natural or technical disasters. Currently, this responsibility falls under the jurisdiction of the Department of Special Situations under the Ministry of Internal Affairs of Georgia, which operates a hotline 112 to handle emergency situations. While they do offer assistance in mountainous regions, the use of professional mountain guides and specialized helicopters for rescue operations has become a common practice in several countries.

The international practice of using professional mountain guides and specialized helicopters for rescue operations has proven to be effective in countries such as Italy, Austria, France, and Switzerland. These rescue teams are stationed close to high-traffic tourist locations and operate under a special agreement with municipal, defense, or internal affairs agencies. This approach ensures that rescuers are certified,

trained, and experienced mountain guides who work within the framework of a contract during rescue operations, while pilots and aircraft are specially trained and equipped for such operations. To improve the rescue operations in Georgia, it would be advisable to implement similar practices that will be based on two main principles: rescuers are certified trained and practicing guides who work within the framework of the contract during rescue operations, and rescue operations are carried out by specially trained pilots and aircraft equipped for similar rescue operations. Most rescue service financing systems are public-private partnerships, with commercial payments made by insurance companies. Examples of rescue companies to consider are REGA, Air Zermatt, and others.

2.2.8 Workforce

Professional education and vocational training has a great influence on the growth of tourism in Svaneti. Adventure tourism, and specifically the profession of adventure guides, plays a significant role in the establishment of this ecosystem.

Currently, about 30 mountain guides with an international diploma (IFMGA) and over 100 qualified guides of other categories, such as ski, rock or hiking guides, operate in Svaneti (having international recognition of mountain guides is a great achievement made by GMGA over the last 20 years of practise). This quantity presently meets the majority of market demand; but, based on the 2016-2019 (15-20%) growth rate, market demand for mountain guides/trekking/ski guides should double in 5 years. To make such progress, a local accredited branch of a professional adventure tourism school should be established to ensure the training and examination of qualified personnel. The Georgian Mountaineering Association and adventure tourism school have the means to help create a branch office in the region in collaboration with local professional education institutions.

These issues should be mentioned as challenges to the guide profession today:

Inadequate preliminary preparation for obtaining professional certifications. Preparation entails physical fitness, motivation, and technical abilities gained via adventurous practice. To address this issue, students should have the opportunity in school to learn about this profession, put themselves to the test in difficult natural conditions, and develop the necessary sports skills, such as participating in mountain camps, mountaineering gatherings, adventure tours, and so on.

There is a scarcity of qualified experts in all adventure tourism (water, air, and land) outdoor activities who can provide education to worldwide standards. With the growing awareness of the need for certification, there is a severe shortage of specialists with significant practical experience and specific knowledge of pedagogy and andragogy who can offer training. To ensure the long-term sustainability of education quality in adventure guides, Georgia must devise short- and medium-term strategies for addressing gaps on the one hand and accelerate the process of educating trainers on the other.

Support for technical and vocational education (TVET) in general, and adventure tourism in particular. Formal professional education in Georgia is mostly funded by the state budget, with numerous donors continually investing in TVET. However, in order to attain sustainability, private sector participation should be promoted more. That is, the educational process, including curricula, should be intimately related to industry-needs and geared to meet market job requirements.

Given Svaneti's significant historical and cultural attractions, it is vital to train guides of the proper profile, providing them with professional knowledge and abilities in accordance with international practice. People who already have similar jobs, such as art historians,

and who have the interest and natural aptitude for sharing this information with tourists in an exciting and memorable way, are often drawn to such careers. This method is frequently employed in worldwide practice and is a prerequisite for a high-quality tourism excursion.

The lack of branded hotels in Svaneti has been a challenge for the local hospitality industry. This has resulted in a shortage of high-standard services in the region. While some relatively high-quality hotels are managed by professionals from big cities, the lower levels of management are usually locals who have received on-job training. To address this issue, it is essential to establish qualified training programs in Svaneti that have been tested in high-quality hotels in Tbilisi and Batumi. These programs should cover a range of topics, including hotel management, service excellence, green hotel practices, cost calculation, menu development, and more.

Furthermore, to sustainably develop the tourism industry in Svaneti, it is crucial to create a system that encourages locals to undergo training in branded hotels and then return to their home region to apply their newly acquired skills. This will not only help to bridge the gap in personnel shortage but also create a pool of skilled workers who can provide high-quality services to visitors.

The role of the DMO Svaneti is critical for the improvement of the destination management framework, which necessitates professional knowledge, effective networking, and a market-oriented approach that must ensure tight collaboration between public-private-community players in order to achieve common goals.

2.2.9 Technology Adoption

The local tourism industry has been making strides in utilizing advances in technology to enhance the visitor experience. A growing number of tourism products, such as accommodations, tours, and activities, can now be booked online through various platforms, including the websites of individual businesses and online travel agencies. This allows visitors to easily plan and book their trips in advance, from anywhere in the world. There are approximately 18 guest houses registered on Airbnb in Racha-Lechkhumi and Lower Svaneti, and hundreds more in Upper Svaneti. It is worth noting that the Mountain Guides Association has recently collaborated with USAID to improve its online portal, where anyone can look for a guide and book immediately.

Furthermore, many tourism businesses in Svaneti now accept credit cards, providing more convenience for visitors and reducing the need for cash transactions. This is particularly important for international visitors who may not have access to local currency or prefer to use their credit cards for safety reasons.

In Svaneti, fiber-optical internet coverage is almost non-existent or very limited, with the exception of Mestia and Lentekhi. This means that access to reliable and high-speed internet can be a challenge for many visitors and tourism businesses, particularly those located in more remote areas. While some businesses may offer Wi-Fi to their guests, the quality and reliability of the connection can vary greatly.

Additionally, energy supply problems can also impact access to Wi-Fi and other electronic devices in Svaneti. The region experiences occasional power outages and voltage fluctuations, which can affect the operation of electrical devices, including routers and modems. This can be particularly problematic for visitors who rely on electronic devices to stay connected with friends and family, or for businesses that rely on Wi-Fi for their operations. In some cases, visitors may also have difficulty charging their electronic devices due to energy supply issues. Therefore, resolving the electricity issues outlined above in the document is critical.

2.3 Stakeholder Mapping

Tourism is a multi-sector industry that requires the involvement of many actors to take significant steps. Some of the organizations that are involved in promoting and managing tourism in the region include:

- Georgian National Tourism Administration (GNTA): This is the official government agency responsible for promoting tourism in Georgia, including the Svaneti region.
- Mountain Trails Agency: This is a government-owned company that manages several ski resorts in Georgia, including in the Svaneti region.
- Mountain Resorts Development Agency: A newly established LEPL under the Ministry of Economy and Sustainable Development is in charge of developing new approaches, feasibility studies, and planning instruments to assist the development of resorts and resort areas around Georgia.
- Mestia and Lentekhi Municipality: They have a role in promoting tourism, managing tourism infrastructure, and working with other local and national organizations to support the tourism industry in the region. They may also be involved in developing policies and regulations related to tourism, as well as working to ensure that tourism activities in the region are sustainable and beneficial for the local community.
- National Agency for Cultural Heritage Preservation – responsible to protect and manage cultural heritage sites over the territory of Georgia, including management of the cultural heritage site museums, monitoring and permits of the works when it is impacted on the cultural heritage sites.
- National Agency of Protected Area – responsible for the development and management of the protected areas all over the territory of Georgia, including national parks and other national protected monuments.
- National Forest Agency - responsible for the large forestland around the settlements
- National Agency of Environment - agency responsible for assessment and monitoring of the environmental risks and climate change resilience.
- Municipal Development Fund - national body responsible for the municipal infrastructure public investment
- GMGA – Georgian Mountain Guide Association, professional association of the certified adventure guides, member of IFMGA (international federation of the national guides associations).
- Svaneti Guide Office llc – company operates mountain, ski and trekking tours and other adventure activities led by certified guides in Svaneti and other parts of Georgia.

2.3.1 Shanland - Svaneti's Destination Management Organization (DMO)

It should be highlighted that the Svaneti DMO - Shanland - plays the most essential role in Svaneti tourism. A destination management and/or marketing organization (DMO) is in charge of promoting the assets of a destination and creating brand awareness in order to attract visitors who will spend money and therefore enhance the economy. These organizations are typically public-private partnerships and are widely utilized as an international standard industry practice to engage local communities and ensure that tourism development is mutually beneficial for both tourism stakeholders, which includes visitors, and its local residents, including nature. They should be concerned with destination stewardship and sustainable management practices with the goal to preserve environmental, social, and cultural assets. They are often responsible for the coordinated and thoughtful planning of all elements of the tourism product or offerings that make up a tourism destination, including providing visitor services.

Svaneti DMO is a non-profit organization established in Mestia Municipality that serves Lower and Upper Svaneti. Despite being active for three years, the DMO, which was founded in 2020 by Mestia Municipality and Lentekhi Municipality, is still in its early phases of development. The Svaneti DMO is active in all major tourism and mountain sports events, such as the International Hiking Festival - Highlander and Freeride World Tour Qualifier tournaments. The only source of revenue for DMO is public financing supplied by the two municipalities. The Svaneti DMO currently has one significant partner - the GRETA project, which supports tourism and agricultural projects throughout the historical region of Svaneti.

This lack of private sector involvement might be a key impediment to the DMO's expansion and success. The business sector brings considerable knowledge and expertise to the table and can play an important role in designing effective tourism development strategies. Without their participation, the DMO may struggle to satisfy its objective and the needs of the tourism industry.

To overcome this issue, different legal structures for DMOs that allow for increased private sector engagement may be required. This could include revising existing regulations or developing new frameworks to encourage increased collaboration between the public and private sector.

It is also critical for the Svaneti DMO to develop a long-term organizational development strategy that includes the recruitment and training of qualified staff, the establishment of dedicated marketing, sales, finance, and statistics departments, and the implementation of a more vertical organizational structure. This will allow the DMO to better assist the tourism industry and promote Svaneti's development as a premium destination.

Ultimately, the DMO's goal is to become as efficient as its European counterparts. This goal will necessitate tremendous effort and expenditure, but it is critical to the success of tourism in the Svaneti region.

2.4 Marketing and Competition Analysis

2.4.1 Svaneti Branding and Positioning Strategy

A comprehensive Brand Strategy for Svaneti was developed by the GRETA project in 2021 through co-creation sessions, workshops and research prepared by Watergunz and Werklig alongside Svaneti stakeholders. In this process, they first recognized that Svaneti is developing in a chaotic way, the unique architecture and traditions are being lost and there is a real danger that mass-tourism could spoil Svaneti. The goal was to establish a clear brand strategy as the first step for Svaneti in securing a unique position among the global destination brands and attracting the right audiences. Achieving these goals will bring financial benefits to the region and further assist in the development of Svaneti into a 4-season mountain resort. The resulting brand strategy answers the challenge of how to combine the abundant characteristics (history, culture, nature, traditions, adventure, sports) into an effective, desirable destination brand.

Final brand strategy document contains the following key elements:

- Values - principles that direct behavior, decision making and brand expression
- Positioning – including competitive advantages, category definition, target audience and customer promise
- Ambition – big future goal, including success and risk factors
- Purpose - the reason why we exist

Values

Svanetian people & their authentic characteristics are the foundation for the brand values. They are identified as the conductors and guardians of the centuries old knowledge and culture, our unique language and the distinctive character. Based on the authentic, unique character, the following values were identified:

- Full of life - heartfelt, energetic, proud
- Maverick - brave, free, adventurous
- Spiritual - magical, restorative, soulful
- Sincere - trustworthy, honest, fair

Positioning

Positioning should be based on competitive advantages. A sustainable competitive advantage must be built on the attributes that cannot be copied and are genuinely part of the organization's culture, activities and actions. The aim should be to find the "Only-ness" so we can proudly claim that: "We are the only brand in the world that..."

In today's fast-paced world, people often feel overwhelmed with daily life and worries, leaving little time or space for themselves and their emotions. A deep longing for a place that is different from the rest of the world, a place where authenticity and nature still exist, has become increasingly important. Svaneti offers just that - a refuge, an oasis where visitors can escape the monotony and refill their energy. As the guardians of human treasure, the Svans have preserved something invaluable - an ancient energy that is reflected in their unique character, traditions, culture, and myths. Svaneti is an inextinguishable vault, and the Svans are ready to share this unique, untouched, and unspoiled energy through their infinite hospitality. This gift is for everyone who seeks to acquaint themselves with one of the oldest cultures, traditions, customs, and myths in the world or who wants to conquer the untouched mountains or ski down their slopes. The Svans are ready to be the guides of an unforgettable journey, as without them, it is impossible to fully feel the knowledge and energy that have been preserved for centuries in Svaneti.

Positioning Statement:

Svaneti is the hide-out, oasis for mythical adventure that helps the connoisseurs of the rare and wild feel more alive.

Ambition

A brand is a strategic plan to reach our ambitions — the one with the best plan wins. True ambition is more than a vague statement. It is our future goal verging on insanity. It should guide our work and keep us on a focused track every day.

Brand Ambition:

By 2027 Svaneti will double visitors from the socially conscious Western European, Asian and Northern American Developed Countries.

Purpose

The purpose statement is developed last by the brand experts. It builds from the customer promise - "We make people feel more alive" and digs deeper into the human insight behind the promise, what is behind our need to feel more alive, what does it make possible. It is our WHY. What inspires us. A good purpose is a source of pride, a sense of ownership, an inspiration to do a little more and stretch a little further.

At any time of the year, when you come to Svaneti, the moment you step on this land, you sense exactly how you are filled with new vital energy. It is as if, you're falling in love with life for the first time, you feel like you love life more. You are filled with millions of impressions, knowledge, sincerity, physical energy ... This is the force of life and the purpose of Svaneti is to rekindle the fire in you, over and over again.

Purpose Statement:

Svaneti is on this planet to rekindle the fire in us.

2.4.2 Visitor Profile and Target Markets

The visitor profile helps describe the characteristics of those visiting the region including visitors' demographics, length of stay, purpose of trip, modes of travel, and typical activities. By explaining the terms used in the Positioning Statement and Brand Ambition, we paint a picture of a socially conscious, experiential traveler. This is a type which combines foreign adventures, rare and wild nature and exploration lovers, with those who expect high standards and authentic experiences, but provided and produced in an ecologically and socially sustainable way.

A “connoisseur” is a person who, through study and interest, has a fine appreciation for something. An adventure connoisseur knows what the world has to offer in terms of the best adventure travel destinations. They have the wealth, skills and fitness levels to experience these destinations to the fullest. The adventure travelers - experiential traveler, enthusiasts, extreme adventure lovers - are those seeking the rare and wild destinations, looking for high potential, yet hitherto unknown places, where access is still difficult. They are conscious consumers who want to know the origins of everything they consume. Support their ideology via choices they make.

Travel Motivation Segmentation

Modern day travelers are known to enjoy experiential travel, a form of travel that gives them long-lasting memories and unique experiences, which make the holidays priceless. Today, experiences have become much more important than creature comforts and attractions, more important than must-sees and photography sessions. In fact, experiences are one of the main things that compel people to travel all over the world today. Experiential travel entails immersing yourself in the essence of a travel destination instead of experiencing it superficially. Rather than spreading a vacation thinly over all the desirable aspects of a city or country, vacationers opt to engage deeply with a specific aspect of the place. Experiential travelers seek to comprehend the locals' lifestyle and their culture. In addition to offering more immersive experiences, there is a rise in demand for ecotourism. Many tour-operator companies are developing ways to achieve this goal – for instance, focusing on adventure and activity-oriented holidays in the mountains, while attempting to minimize the carbon footprint. Georgia has a "National Eco-tourism Development Strategy" developed at the request of the Georgian National Tourism Administration. This is a leading policy document to be considered for the development of ecotourism standards and conditions in the Svaneti municipalities' territory.

Profiles of Target Markets

Soft Adventure /Nature Travelers	In Svaneti, soft adventure includes 4WD trips, trekking, biking, and hiking. These tourists are from the Baltic states, Poland, the UK, Scandinavia, the United States, and Russia. They are 25 to 70 years old.
Skiers	The majority of skiers are from Germany, the Czech Republic, Poland, Russia, Belarus, Ukraine, Baltic states, and UAE (new segment but already significant). Ski resorts in Svaneti receive little coverage at international tourism expos and in specialized publications. The majority of skiers are independent, young people looking for a great value, fresh slopes for off-trail skiing, and a terrific skiing experience. They frequently do not use tour companies and instead book their vacations directly.
Horseback riders	There are increasingly more travelers who are particularly interested in horseback riding. This might be a primary objective or just one of the activities of the regular journey. Visitors come from Russia, the United States, Germany, the United Kingdom, Scandinavia, and the Baltic nations. They are between the ages of 25 and 70.
Culture	Svaneti is a must-visit location for travellers from North America, Europe, Japan, and the Middle East in terms of culture. These travelers range widely in age, from 20 to 80. They journey independently or in large groups.
Gastronomy	The travel industry's gastronomic tourism sector, which includes academics, culinary writers, journalists, and food enthusiasts in general, is quickly expanding. They are mostly female travelers from North America, Western Europe, Japan, and occasionally South America, and range in age from 35 to 70.

Geographic Segmentation

Experiential travelers are found in all age groups, income levels and geographical locations. Psychologically, they are less affected by traditional barriers such as long distance travel, time problems or costs and are usually the main category in the long distance travel segment. They are likely to stay in the country for a longer period of time, spend more money and visit more regions. Due to the need of training and special equipment for their desired activities adventure travelers are avid users of professional services such as guides, instructors and tour operators.

Tourist target countries for Svaneti can be divided into three categories:

1. Bordering countries: Armenia, Azerbaijan, Russia, and Turkey
2. Middle-distance countries: European, Middle Eastern (particularly the UAE, Saudi Arabia, Qatar, Kuwait and Israel), and Central Asian (particularly Kazakhstan) countries
3. Long-distance countries: Far Asia (particularly Japan, China, and Korea), the United States, Canada, Australia, and others.

Map 5: Visitor Segmentation by Flight Duration. Source: GRETA.



Based on GNTA's National Tourism Strategy, the target audience and goal is to double the number of visitors from higher spending markets of Western Europe, Asia, and North America.

Estimated Market Size

Country	Estimated Market Size
Poland	More than 30% of the population travel internationally; Looking for new and authentic experiences; 41,917 visitors from Poland in 2022; Georgia accounts for 0.8% of Polish outbound travel.
Germany	14.6 million skiers; Gastronomy and wine are also popular; 48,548 visitors in 2022; Georgia accounts for only 0.09% of German outbound travel.
Ukraine	56% of the population traveled abroad in 2019; Love ski vacations, especially affordable ski vacations, with good food and wine; 168,915 visitors from Ukraine in 2022; Georgia accounts for 0.7% of Ukrainian outbound travel.
UK	Wine and gastronomy and culture; 21,408 visitors from the UK in 2022; Georgia accounts for 0.04% of UK outbound travel.
USA	13% want to experience different cultures, and 9% want to broaden their perspective; Lately more American travelers are choosing a destination based on food; approximately 40,000 US visitors in 2022; Georgia accounts for 0.04% of US outbound travel.
Kazakhstan	Sightseeing, adventure; 8.7 million citizens traveled abroad. In 2022, Georgia received around 120,000 visitors from Kazakhstan. Georgia accounts for 1.3% of Kazakhstan outbound travel.
Middle East	Increasing number of visitors; Love nature and ski resorts; Usually travel as family groups. Israel is among the top 5 countries, 210,178 visitors in 2022. In 2022, the authorities in Israel recorded over eight million departures abroad of Israeli citizens. The same number is for Saudi Arabian outbound travelers. In 2022, around 140,000 visitors came from Saudi Arabia to Georgia, which is 1.7% of the total outbound market.

2.4.3 Competitor Analysis



Autonomous Province of Trento (Trentino), Italy:

Trentino, located in northern Italy, is a year-round destination known for its natural beauty, including the famous Dolomite Mountains. The destination markets itself towards outdoor adventure- and environment-loving individuals who want to explore the natural and cultural environment. The province offers a wide range of historic and cultural sites, including Buonconsiglio Castle and the Museum of Natural Science. These are the great examples using economic values of having UNESCO world heritage cultural and natural sites as economic drivers of the province (case to consider for Ushguli UNESCO site development). Winter activities such as skiing, snowboarding, and sledding are popular, with numerous ski resorts available. In the summer, visitors can enjoy vineyards and other agricultural attractions, hiking, mountain biking, rock climbing, or scenic lakes. Trento, the capital of the region, offers arts and culture enthusiasts festivals such as the Trentino Music Festival or the Summer Solstice Art and Music Festival. Trentino is a destination for tourists who crave untouched nature, enriching history, and a colorful culture of the arts.

Park City, Utah:

This charming mountain town in Utah is known for its two world-class ski resorts (Park City Mountain Resort and Deer Valley Resort), outdoor activities like hiking, biking, and golfing. The town's Main Street features historic buildings, shops, art galleries, and restaurants. The Utah Olympic Park from the 2002 Winter Olympics offers activities like bobsledding and ziplining. Park City hosts the Sundance Film Festival every January and has a thriving arts and culture scene. Visitors can explore the beautiful Uinta National Forest or take a scenic drive through the nearby canyons.



Sölden, Austria:

Sölden is a mountain community in Austria that in terms of size, environment, and people, is similar to Svaneti. Sölden is a year-round destination that offers a range of outdoor activities, stunning natural beauty, and picturesque landscapes. The region's proximity to Innsbruck and a well-developed transportation network make it an accessible destination for travelers. Winter months offer traditional winter activities such as skiing, snowboarding, and tobogganing on a network of slopes that connect to the Rettenbach and Tiefenbach glaciers. "The Big 3" mountain peaks have gondolas and cable cars (around 40 ski-lifts) open in winter and summer and offer scenic rides to mountain top restaurants and views. Summer months provide opportunities for hiking, biking, and rock climbing on Alpine trails, mountain lakes, and wellness experiences such as spas. The slogan "Think Big-Think Sölden" is ideal for this alpine community.

Ouyoune el Simane (Mzaar Kfardebian), Lebanon

Ouyoune el Simane, also known as Mzaar Kfardebian, is the largest ski resort in the Middle East located in the Keserwan district of Lebanon's Mount Lebanon Governorate. The regional destination marketing brand targets an audience of history buffs, environmental enthusiasts, and cultural tourists, while the resort focuses on winter mountain sport participants. With 42 slopes and 80 kilometers of groomed trails, Mzaar Kfardebian is a top MENA destination for skiing and snowboarding during the winter months. In the summer season, the resort offers hiking, mountain biking, and other outdoor activities, as well as an annual Summer Festival featuring live music, artisan booths, and food stands. Easily accessible from Beirut, Ouyoune el Simane is a destination for adventurers seeking a "hidden-gem" mountain experience with a familiar feel of the European Alpine scene.

Gusar (Qusar), Azerbaijan

Gusar is a city located in the northern part of Azerbaijan, near the border with Russia. The area is known as Azerbaijan's "northern gates" and is a year-round tourist destination for Caucasus Mountains scenery, traditional rustic villages, and tasty Lezgi cuisine. In winter, visitors can enjoy skiing, snowboarding, winter hiking, and traditional bathhouses. The Shahdag Mountain Resort is a popular ski resort that offers such winter sports activities. In summer, visitors can enjoy outdoor activities such as hiking, trekking, camping, water sports, and horseback riding. Cultural and historical sites, including ancient mosques and traditional Azerbaijani villages, are also available to explore. The natural beauty of the Shahdag National Park with its mountains, forests, rivers, and lakes, and the preserved unique culture attracts many visitors seeking a scenic and enriching immersion experience.

Table 5: Competitor Analysis

Destination	Description	Main Motivation	Unique Selling Proposition
Trentino, Italy	Characterized by its natural beauty, encompassing picturesque landscapes and mountainous terrain, notably the Dolomite Mountains. Cultural landscape of UNESCO world heritage.	Untouched nature, enriching history, and a colorful culture of the arts	Dolomites
Park City, Utah	Park City is a charming mountain town known for all-year outdoor adventures, historic sites, famous cultural events and artistic scene, and the natural beauty of forests and canyons.	Outdoor adventure and artistic expression	Sundance Film Festival & Utah Olympic Park (2002 Winter Olympics)
Sölden, Austria	“The Heartbeat of the Alps” is a renowned destination for its extensive range of outdoor activities, stunning natural beauty with panoramic views of the surrounding Ötztal Alps, and picturesque landscapes. Big mountains and strong community, very advanced commercial ski-resort, host place of FIS races.	Getaway stimulation - exhilarating, tranquil, or both.	“The Big 3” - three different peaks over 3,000 meters high
Mzaar Kfardebian, Lebanon	Also known as Ouyoune el Simane, it is a unique region for its outdoor activities and communal events offered in both summer and winter, as well as the panoramic views from the peaks and of the nearby towns.	Hidden-gem mountain experience with a familiar feel of the European Alpine scene	Largest ski resort in the Middle East.
Val d’Isere, France	Val d’Isère has to be one of the most beautiful French ski resorts, nestled in a valley at the foot of the mountains with its chocolate-box chalets and high-end hotels spread between the central town and its outlying villages.	Skiing experience	Biggest ski resort
Chamonix, France	Chamonix is a resort area near the junction of France, Switzerland and Italy. At the base of Mont Blanc, the highest summit in the Alps, it's renowned for its skiing.	Mixing mountain culture & adventure	Mont Blanc
Lapland	Lapland is Finland’s northernmost region, known for its vast subarctic wilderness, ski resorts and natural phenomena including the midnight sun and the Northern Lights. It is the homeland of the indigenous Sami people.	Fairytale adventure	Santa Claus, Sami People

Competitive Advantages of Svaneti

Four key competitive advantages (from Svaneti Brand Strategy):

1. Mountain Adventure in Untouched Nature - Climbing opportunities to the big Caucasus mountains and a wide choice of winter/summer adventure sports. Tourists can truly discover untouched, wild nature. Professionally guided adventures are not for everyone, but require a level of fitness and explorer attitude. Mountain tops over 5000 meters, ski touring, hiking, heliskiing; for those with means and ability.
2. Off the Beaten Track - Svaneti is new and mostly unknown. This is highly appealing to people who already have most they need. There is an awe-inspiring contrast in being an ancient civilization and yet to be discovered.
3. Culture & Legends: A Living Museum - Svaneti can rightfully claim outstanding universal value through living examples of mountains with villages, architecture and arts of medieval origin - still retained in their original use and interspersed with the contemporary lifestyle.
4. Unique People & Rare Hospitality - Svans are sincere mavericks with a sense of adventure & fun, and full of hospitality to visitors. This is the hardest asset to copy or control.

2.4.4 Assessing Destination Marketing Efforts

Svaneti's marketing efforts can be divided into several categories, including:

Competitive Disadvantages of Svaneti

While both Upper and Lower Svaneti share some common challenges and problems, there are also substantial differences in the level and scope of challenges they face.

Here is the list of the most pressing overarching challenges common for both sub-regions, Upper Svaneti and Lower Svaneti:

- Road infrastructure and accessibility
- Energy and power supply
- Education resources and infrastructure
- Shortage of locally grown food products
- Waste management
- Water and sanitation
- Sustainable energy
- Environmental hazards associated with climate change and urban/industrial expansion.

Promotional Campaigns

The Georgian National Tourism Administration and Svaneti DMO promote Svaneti through various marketing campaigns, both online and offline. These campaigns use a mix of visual and written content to showcase the region's attractions and encourage tourists to visit. The National Tourism Administration and Svaneti DMO participate in various exhibitions abroad, thus trying to increase the promotion of the region. It is worth noting that in March 2023, Georgia hosted the large-scale ITB Berlin exhibition, and an image of Svaneti was displayed on one of the major billboards. The positioning of the Svaneti brand took a big part in the promotion campaign of the country. However, there is still a strong need for the Svaneti DMO to receive proper training in order to ensure that the brand is used effectively and consistently.

Online Presence

Svaneti has an online presence through social media platforms such as Facebook and Instagram (#Svanetia has 23.3K and #Svaneti has 207K posts on Instagram). These platforms are used both by different public agencies as well as individual guides and travelers to share photos, videos, and other content that highlight the region's natural beauty and cultural offerings.

Tour Packages

Many tour operators offer packages that include visits to Svaneti. These packages usually include transportation, accommodations, and activities such as hiking, skiing, and cultural tours. However, it should also be noted that more emphasis is placed on Mestia municipality and Lentekhi is included in only a very small part of the tours.

Festivals and Events

Svaneti hosts several cultural festivals throughout the year that attract both domestic and international tourists. These events showcase the region's traditional music, dance, food, and crafts. Such festivals are Mestia Annual Film Festival, Zuruldi Cup, Freeride qualifying competitions, and Highlander. This year Svanset Festival will be held in Lentekhi, where representatives of Svan folklore and modern music will play.

3.0 Opportunities Assessment

3.1 Overall Region Opportunities

The following section identifies potential tourism product development for the winter and summer seasons in Upper and Lower Svaneti.

3.1.1 Winter Season

Development of ski resorts in Mestia

It is proposed for the Tetnuld area to connect the village of Mulakhai and the Tetnuldi ski area, which is required for access from Mestia to the Tetnuldi area. At the moment, the used road is around 20 km long, with 8 kilometers in poor condition. The construction of a new cable car will result in the development of the Mulakhi settlement and its transformation into a ski resort (11 historical villages), with up to 5,000 beds planned, so that the areas of historic buildings will not be disturbed, creating a historical example of how a historic place can be connected to a modern resort. The municipality has designed and accepted a spatial arrangement and urban development plan for the Mulakhi community, and the cableway construction project has been prepared and is in the process of the agreement. The cable car will cut the trip time between Mestia and Tetnula in half. A cable car proposed for the next stage will connect the Tetnuldi and Hatsval cable cars, creating a large agglomeration with the capacity for 150 thousand skiers.

New ski resort project in Lentekhi

The establishment of a new mountain-ski resort Chutkharo will be a significant innovation in Lower Svaneti and Racha. The new resort, which will be built on 5,000 acres, will be the largest in the Transcaucasian region and a new tourist magnet. This resort's main advantages are its unique climatic data, duration of snow, variety of tracks, and proximity to the airports of Kutaisi and Ambrolauri. The establishment of the mountain-ski resort Chutkharo will aid in the economic development of the municipalities of Lentekhi, Oni, and Ambrolauri.

Public-Private Consortium

A good example of partnership between public and private companies is the Grand Massif Ski Area in France that involves 5 resorts, managed by Company Des Alpes (CDA). CDA participated in the planning of the Svaneti ski-areas and has MoU with the Georgian ski-resort company MTA. This collaboration has the potential to bring international best practices from France to Georgia. Assisting the

development of the Tetnaldi and Mestia ski regions. At the request of the MTA, the CDA is conducting a feasibility assessment for the establishment of a new ski resort that will be connected with the Lentekhi municipality.

The revival of Zeskho camp

In Zeskho, Lentekhi municipality, it is planned to organize and develop mountaineering camps and adventure tourist products. This camp is located beside Georgia's highest peak, Shkhara, and is a popular destination for mountaineers as well as tourists interested in active recreation and adventure tourism.

Heliskiing

The popularity of heliski and ski touring tours grows year after year. This is a high-spending segment willing to pay thousands of euros for a one-week vacation. To expand this section, a mountain rescue service, as well as a hut system that can be utilized even in winter and will greatly enhance the ski tour area, as well as incorporate very remote settlements in the travel routes, are required. The following routes and locations are particularly interesting for ski touring, freeride skiing and heliskiing: Ushguli, Becho Gorge, Laila Ridge and Pass, Chalaad Glacier, Koruldi Lakes, Tetnuld-Hadish, Banguriani, Kish Glacier, Seri Glacier, Twiber Gorge, Nakri Gorge, Gulis Pass and Kasab Glacier. Apart from the activities mentioned above, these locations are also interesting for mountaineering and hiking tours.

Caucasus Mountain Centre

The creation of this center is planned for Mount Zuruldi in Mestia, 2400 metres above sea level, in conjunction with the legendary mountaineer Reinhold Messner. The Caucasus Mountain Centre will be the first museum created with Reinhold Messner's (very famous high-altitude climber) support and in partnership with the Messner Museum Network outside of the Italian Alps. It is critical that the Caucasus Mountain Centre be the region's first and most recognizable museum of alpinism, mountain culture, and history, increasing Georgia's popularity in the world of alpinism and laying the groundwork for the development of the Svaneti's mountain culture and mountain tourism.

Trail Development and Maintenance

With the support of the GNTA, a network of trails has been established, some of which are marked, some of which are being researched, and some of which are deemed promising. Trails are necessary for attracting guests interested in hiking tourism, which creates economic activity centers along them, such as accommodations. There are only a few official routes that are more or less well-known in the municipality of Lentekhi. Latfar Pass and Mount Golda are two examples. As of now, Kvemo Svaneti is hardly known as a tourist destination. It is a priority to open at least three hiking paths connecting Upper and Lower Svaneti during the summer season. Other travel services, such as housing (homestays-hotels), equestrian support, transportation to and from the route entry points, local guiding, and others, should begin to operate along the proposed three hiking trails. The Kala-Ushguli-Lentekh connecting route is an excellent choice for individuals interested in cycling and horseback riding tours, as well as "off-road" activities.

Festivals

Hosting festivals is an excellent way for Svaneti to attract international visitors and promote its rich cultural heritage. Festivals can create interpretive experiences that highlight local traditions, providing visitors with a deeper appreciation of the region's history and customs. For instance, the "Lamproba" festival, which is unique to Svaneti, is one of the most beautiful holidays celebrated in the pre-spring period for good weather and harvest. This festival is characterized by wooden lamps that are used during rituals before people gather around the fire to sing, dance, wrestle, and engage in other cultural activities. Svaneti could benefit significantly from promoting this type of event on an international level, allowing visitors to immerse themselves in local traditions and gain a deeper understanding of the region's cultural heritage. By capitalizing on festivals like Lamproba, Svaneti can attract more visitors and create new economic opportunities for locals, which could help to sustainably develop the region's tourism industry. In addition, Svaneti could work on offering live historical events to visitors. This can diversify its tourism industry beyond just outdoor activities such as hiking and skiing. This can attract a wider range of visitors, including those who are interested in cultural tourism.

Restoration of Cultural Complexes

Cultural excursions and the restoration of Svaneti's distinctive complexes, such as the Kaldan-Naverian complex in Mulakh, Charkviani in Latal, and Khergiani and Chartolani in Mestia, which include underground architecture and would lengthen tour duration, are also extremely important tourism development opportunities. Many significant cultural monuments may be found in Lentekhi. For example, the Holy See Cathedral, the famous Chukul Church, and the little temple of Okondabish with its unique frescoes. In the settlement of Makha, we come across Svan-style houses, towers, and large-hall Svan mansions. Because most of the settlements have been fully or

partially depopulated, many monuments are in disrepair. In this setting, many historic rituals and holidays are also in danger of extinction. Limurqamal, Haul-Maul, Mambgu, Sami Eklesiob (three churches), and others are examples. Since all these holidays look quite interesting and spectacular, restoring them and turning them into tourist packages will also make a significant contribution to the development of this region. Historical communities may obtain the ability to receive and entertain tourists; however, at the current time, these villages need urban environment changes. Lakham is one of these, as are a number of renovated towers that no longer serve their traditional use and have yet to be repurposed, such as Margiani Machubi and towers in Mestia, Lentekhi Castle and the museum there.

Sporting Competitions

Hosting sports and adventure competitions can be an effective way for Svaneti to attract top athletes and increase visibility of the region. For example, hosting events such as Freeride World Tour qualifier events and Highlander competitions can not only showcase the natural beauty of Svaneti, but also highlight the region's potential as a destination for outdoor enthusiasts. These events can attract participants and spectators from all over the world, which can provide a boost to the local economy during the low season.

Alpinism

Svaneti could benefit greatly from becoming a popular destination for alpinism, both for beginners and professionals. For beginners, Svaneti's beautiful mountains and stunning natural scenery can provide an excellent introduction to the sport, while experienced climbers can be drawn to the more challenging peaks and routes that the region has to offer such as Ushba, Shkhara, Ailama and other famous summits with extremely difficult climbing routes. By promoting itself as an alpinism destination, Svaneti can attract a wider range of visitors who are interested in outdoor sports and adventure. This can provide a boost to the local economy, particularly during the low season when other forms of tourism may be less popular.

Equestrian Tourism

Svaneti has great potential for developing equestrian tourism on the same routes that are popular among ski tourists during the winter and spring. From the first snowfall of the season until spring, the same trails, guesthouses, and huts can be used to host equestrian tourists. This approach offers convenience for tour planners and a viable small business opportunity for the local population. By offering equestrian tourism in this way, Svaneti can diversify its tourism offerings and attract a wider range of visitors. Additionally, equestrian tourism can be an excellent way to showcase the region's natural beauty and cultural heritage, while providing visitors with an opportunity to connect with local traditions and customs.

Community-based Ecotourism and Agritourism

Svaneti has great potential for developing community-based ecotourism. Special programs for children can be organized to teach them about the local ecosystem, domestic animals, and traditional ways of life, including cheese making and bread baking. Parents can also participate in these activities and learn to cook local dishes, spin wool, and make traditional Svan hats. Marked walking paths can be created that cater to all age groups and fitness levels, offering a safe and enjoyable way to explore the region's natural beauty. Svaneti's long season and abundant seasonal forest products, such as mushrooms and berries, make it an ideal destination for agritourism. By focusing on the interests and requirements of all visitors, Svaneti can strengthen its community-based cultural offerings in a unique and rewarding experience for tourists.

Wellness Tourism

Svaneti's natural beauty and peaceful atmosphere make it an ideal destination for wellness tourism. With the growing popularity of yoga, meditation, and fitness, Svaneti can attract visitors who seek to unwind and rejuvenate in a tranquil setting. The region could offer various wellness programs and retreats that incorporate local traditions and practices. For example, visitors could participate in yoga and meditation sessions amidst the stunning mountain scenery, practice traditional Svanetian dance as a form of exercise, or receive healing treatments using local herbs and natural remedies. Svaneti could also establish wellness centers and spas that cater to the needs of visitors seeking relaxation and rejuvenation. By promoting wellness tourism, Svaneti can attract a new segment of visitors and promote the region as a place of holistic healing and wellness.

River Adventures

Tskhenistkali River's highly-diverse rafting offerings and fishing season makes Kvemo Svaneti an especially appealing tourist location for the multi-day river rafting and kayaking lovers. The development of river journeys necessitates the construction of well-maintained roads and camping areas at the river's entry and exit locations, the training of qualified, certified guides, and the acquisition of necessary equipment (life jacket, helmet, paddle, neoprene clothing and shoes). The availability of rescue services, access to medical facilities, and activity coordination are all critical. It is critical to have continual connection with river tourism operators and engineering facility operator-companies where there are artificial reservoirs and hydro-power facilities.

3.1.3 Potential New Market Opportunities

Domestic Markets

As mentioned before, the Svaneti region already has a significant share of domestic travelers, but most of them are interested in cultural tours. To tap into a new market opportunity, businesses could create more adventure tourism opportunities that appeal to younger visitors who are interested in outdoor activities such as hiking, skiing, and paragliding. In addition, music festivals in unique historical environments could be a popular attraction for young visitors living in larger cities.

Promoting wellness tourism activities such as yoga retreats and meditation could attract a different type of city visitor who is looking for a more holistic travel experience. Agritourism offerings can be promoted effectively to families. Lower Svaneti, where currently only relatives of local residents tend to visit, could be transformed into an attractive destination by improving the quality of tourism services and developing new attractions for all ages.

International Markets

Based on GNNTA's National Tourism Strategy, the target audience and goal is to double the number of visitors from higher spending markets of Western Europe, Asia, and North America. The National Tourism Administration and Svaneti DMO participate in various exhibitions abroad, including when Georgia hosted the large-scale ITB Berlin exhibition and the positioning of the Svaneti brand was center-stage in the promotion campaign of the country.

Other marketing partnerships and international association collaborations, like with the Adventure Travel and Trade Association, can offer creative and out-of-the-box opportunities to reach the target audience: the socially conscious, experiential traveler and adventure connoisseur from Western Europe or North America with money to spend on luxury or high-end offerings.

Bringing Svaneti to its target international audiences via experiential marketing campaigns, like a familiarization trip in reverse, can be a particularly successful tool. This could look like a Svaneti mini-fest with singing and food carts sponsored by Lufthansa at Munich's Central Station offering discounted prices to Svaneti tour packages.

Niche and Affinity Group Markets

By improving heliski and ski touring operations, developing mountain huts, and enhancing rescue services, Svaneti has the potential to attract niche winter tourists who seek extreme outdoor adventures and are willing to pay high prices for exclusive tours. Other niche markets also discussed as summer season opportunities included Wellness tourism, Ecotourism, and Agritourism, particularly targeting families with children.

Looking at these opportunities by visitor profile opens up new considerations. The Scientific-Academic-Volunteer-Education (SAVE) market is particularly key for both longer stays or larger groups, when considering research field assignments, university class trips or adult-education group tours. Just as festival-goers spend high prices for a long weekend and longer to see headlining DJs or specialty music acts in exclusive destinations, so do “foodies” for a celebrity chef-led master class and gastro-tourism experience. Combine food, wine, and wellness with the safety of Georgia and you have the perfect product for a solo-female or ladies-only group trip.

3.1.4 Sales and Distribution Channels

- GNTA’s digital & social media channels
- MTA’s digital & social media channels
- Tour Operators email marketing, digital, social media channels
- Press Media FAM Trips
- Tour Operators FAM trips
- International trade fairs: ITB Berlin (Germany), World Travel Market (London), Adventure World Travel Summit, Matka Nordic Travel Fair (Finland), Reiselivsmessen Oslo (Norway), Fitur (Madrid), IFTM (Paris), Tour Salon Poznan (Poland), BaltTour (Riga), JATA Tourism Expo, Japan, etc
- International events, sport (ski) competitions and festivals
- Travel Agent and Affiliate program
- Storytelling through content, digital marketing and social media:
 - Social media advertising: Promote Svaneti on social media platforms such as Facebook, Instagram, and Tiktok by creating targeted ads that reach specific audiences.
 - Search engine optimization (SEO): Create Svaneti tourism website and optimize for search engines such as Google to improve its ranking and visibility in search results.
 - Influencer marketing: Partner with social media influencers who have a large following and who can create content that showcases Svaneti's attractions to their audiences.

- Virtual tours: Create virtual tours of Svaneti's attractions using 360-degree videos and photos that can be shared on social media and the tourism website.
- Video production and vlogs: Use video production for cultural recordings and education, storytelling, reaching film location scouts or the YouTube ASMR market, or to get fly-over drone promotional footage for the destination (heliskiers will be inspired to see it for themselves).
- Packaging and Key Partnerships
 - Local & international ski associations
 - Local & international trail and trekking associations
 - Caucasus culture and heritage associations
 - American Friends of Georgia
 - International ski resorts (VAIL Resorts; Park City, Utah)
 - Tourism trade associations: Adventure Travel Trade Association (ATTA), Destinations International, Travel Massive
 - International & local culture/adventure NGOs: EG: Trans Caucasus Trail
 - International horseback riding associations

3.2 Value Chain and Visitor Expenditure Estimates for Summer and Winter Seasons

An internationally recognised method known as the Visitor Expenditure Method can be used to quantify the economic impact of these tourists. This method calculates the contribution of visitor spending to the local economy by factoring in the cost of local services and to estimate the total economic contribution of tourism to the local economy throughout the year, we can assume 2000 beds with a 30% occupancy rate during the winter season and a 70% occupancy rate during the summer season. Based on this assumption, the total local expenditure of visitors throughout the year would amount to: $(2000 \times 30\% \times 22,800,000 \text{ GEL}) + (2000 \times 70\% \times 72,240,000 \text{ GEL}) = 95,040,000 \text{ GEL}$.

Summer - To estimate the economic impact of tourism in Mestia during the summer season, we can consider the following distribution of daily expenses for one visitor:

- Overnight stay (guesthouse): 150 GEL (local hotel)
- Meal (three-course meal): 100 GEL (local restaurant)
- Cable car subscription (daily subscription): 0.00 GEL (cable car company)
- Local transport (including Mestia-Mulakh): 100 GEL (local transport)
- Instructor/guide salary: 50 GEL (local instructor)
- Breakfast on the mountain, souvenir, etc.: 30.00 GEL (local operation)

The total cost for a visitor during a day in Mestia in the summer season is then calculated to be 430 GEL (172 USD), with all of it going to local revenues.

Assuming a 70% occupancy rate for 120 days in the summer season, and taking into account the availability of 2000 beds, the estimated total local income during the summer season would be: $2000 \times 70\% \times 430 \text{ GEL} \times 120 \text{ days} = 72,240,000 \text{ GEL}$.

Winter - To estimate the economic impact of tourism in Mestia, we can consider the distribution of daily expenses for one visitor during the winter season. This may include:

- Overnight stay (guesthouse): 100 GEL (local hotel)
- Meal (three-course meal): 100 GEL (local restaurant)
- Cable car subscription (daily subscription): 40 GEL (cable car company)
- Local transport (including Mestia-Mulakhi): 50 GEL (local transport)
- Instructor/guide salary: 50 GEL (local instructor)
- Breakfast on the mountain, souvenir, etc.: 30 GEL (on-site operation)

The total cost for a visitor during a day in Mestia in winter season is 420 GEL (188 USD), with 380 GEL going to local revenues and 40 GEL to the business company (in this case, the cableway operator company).

Assuming a 30% occupancy rate for 100 days in the winter season, and taking into account the availability of 2000 beds, the estimated total local income would be: $2000 \times 30\% \times 380 \text{ GEL} \times 100 \text{ days} = 22,800,000 \text{ GEL}$.

3.3 PESTLE Analysis and Major Constraints

Political: The government of Georgia is actively promoting tourism as a key sector for economic growth and is investing in infrastructure development to support tourism. This is an important instrument to promote tourism in Svaneti as it stands as one of the most remarkable destination areas in Georgia (An image of Svaneti was at the main poster at the ITB, where Georgia was an official host country in 2023). According to Georgia's territorial organization, Municipality of Mestia and Lentekhi are self-governed municipalities having a self-elected municipal council “Sakrebulo”. Executive branch of the municipal government is with the Mayor of the municipality and his office. Municipal budget is composed mainly by central budget re-transfers, local revenues and taxes (land tax) remaining in the municipal budget. As a place with significant tourism interests, the DMO of Svaneti has been created and financed by the municipalities of Mestia and Lentekhi. Compared to the other DMOs in Georgia, Svaneti DMO has a substantial budget, however external financial and technical assistance is needed to improve overall performance of the DMO office and to finance specific projects/programs that are needed to improve tourism services and increase capacity needed for the destination management.

Economic: Georgia's economy is growing, and tourism is a significant contributor to its GDP. However, Svaneti remains a relatively undeveloped region, and there is a need for more investment in infrastructure and services supporting the tourism sector at local level. These investment needs : improvement of state road conditions, regular maintenance and further development of new internal roads and connectivity with the existing network; air connectivity to improve by making flight conditions safe and reliable by improving navigation services and extension of the airport terminal in Mestia; new road and connecting Upper and Lower Svaneti with a good quality of road (concrete-asphalt). Introduction of a local tourism bed-tax, that will remain in the municipality to leverage directly financing of the needs of the local hotels/accommodation/catering and tourism operators (hotels, catering, guiding); stimulate workforce capacity building programs and support professional education programs at municipal level (supporting students from the remote location offering tuition to cover costs of education processes and provide accommodation.

Social: Svaneti has a rich cultural heritage, and its people are proud of their traditions and customs. However, there is a concern that tourism may have negative social impacts such as changing the local culture and disrupting traditional ways of life. Tourism stimulates youth employment opportunities when it comes to the services such as guiding, catering, small hotel and guesthouse operations, transport, etc. This factor already changes the demographic trend and this needs to be strongly supported by local, regional and national authorities. Cultural and social sensitivity of the mountain communities needs to be considered during the planning of the large to medium size tourism infrastructure - such as ski-lifts, large hotels and resort settlements. More emphasis should be given to maintain a proper system regulating the heritage protection based on the national law on heritage preservation and respecting local traditions and adapting the urban historic landscape to the new needs of modern economic development requirements, but at the same time respecting interests of the communities of authentic villages.

Technological: Technology is playing an increasingly important role in tourism, and there is a need for Svaneti to adopt modern technologies to enhance the visitor experience. The main communication network is a well-developed network of cell-phones that are serving almost all villages around. For example, there is a need for better (more reliable and fast) internet connectivity, new mobile apps supporting bookings, bank transactions and online payments. Internet connectivity is most important for custom oriented services, visitors' safety, professional networking, destination marketing and professional education. These processes should be supported by the private and public authorities and education institutions.

Legal: Georgia has a favorable legal environment for tourism development, and the government has implemented various policies and regulations to support the industry. However, there may be legal challenges related to land ownership, environmental protection, and labor laws that could impact tourism development in Svaneti. As an adventure tourism destination Svaneti needs to have a proper system of safety regulations that are directly linked with the adventure guides professional skills and certification. With this in mind, it is expected that mountain/adventure guiding professionals are perceived as a high-risk profession and should be considered as a regulated business. Such systems exist in all Alpine countries (Switzerland, Italy, Austria, France, Germany) and in Canada, UK, USA in the form of the professional standards regulated and protected by the state law. On one hand, this is subject to the national regulatory framework, However adventure guides in Svaneti should be ready when such legal regulatory changes will come. "Svaneti Guide office" llc is a perfect example of the responsible attitude and professional approach, by employing only Georgian certified mountain guides. All other regulations will come soon with the EU integration requirements such as food security standards defined as HACCP, new building code requiring new safety standards when it is related to the construction of the hotels and other touristic facilities. .

Environmental: Svaneti's natural environment is a key attraction for visitors, but tourism activities can have negative environmental impacts, such as overuse of resources, disturbing habitats and creating pollution. Sustainable tourism standards should be implemented, promoted and enforced whenever possible to ensure the long-term viability of the destination and illustrate the advantages of environmentally friendly practices. Wastewater and solid waste issues should be on the top agenda of local municipalities to scale those services with tourism growth. Impacts on nature and the industry need to be considered when implementing projects and when feasibility studies are carried-out for the large, medium and small size HPPs. LAG Svaneti conducted intensive consultations with locals and provided the Mestia Municipality Development Strategy and Action plan in 2022-2027 which was approved by the Municipal council. One of the main concerns addressed in the study is environmental pollution, which can lead to the degradation of natural resources and damage to wildlife habitats. Another concerning impact is the potential extinction of rare species of plants and animals. Furthermore, infrastructure projects such as road construction and hotel development often prioritize economic gains over environmental considerations, leading to a lack of consideration of environmental issues during their implementation. Finally, forest fires are a significant threat to the environment and wildlife, especially during the dry season.

3.4 SWOT Analysis and Summary

Svaneti’s strengths lie in its natural assets, activities and rich heritage, with development focused particularly in Upper Svaneti. Due to these strengths there are ample opportunities for diversification of tourism products, infrastructure and market channels. Weaknesses focus around lack of infrastructure and base services, with outside threats focusing these development efforts on sustainable solutions.

Strengths	Weakness
<p>Natural Environment & Resources (glaciers, rivers, forestland, ...)</p> <p>Outdoor Adventure (hiking, climbing, skiing, whitewater rafting, ...)</p> <p>Seasonal Activities (summer and winter)</p> <p>Ancient Traditions & Living History (Svan heritage & monuments)</p> <p>Ski Resorts (Mestia - modern ski-resort areas and well groomed slopes; unlimited off-piste opportunities, heliski and other extreme ski opportunities)</p> <p>Excellent Network of Marked Trails (40 trails around Mestia)</p> <p>IFMGA Accredited Adventure & Trekking Guides</p> <p>Good environment for the creation of additional diversified tourist products</p>	<p>Roads (infrastructure, safety and accessibility)</p> <p>Flight connectivity (small planes and non-reliable schedule)</p> <p>Energy (transmission lines and sustainable power supply)</p> <p>Educational Resources (low professional education quality and capacity to meet modern standards)</p> <p>Shortage of locally grown food products</p> <p>Solid Waste management at local and municipal level</p> <p>Water Quality and Sanitation (lack of wastewater treatment)</p> <p>Municipal Transport (no public transportation)</p> <p>Lack of Marked & Serviced Trails (Lentekhi - with the proper huts and overnights along the multi-day hiking routes)</p> <p>Emergency Mountain Rescue Services (helicopter and qualified rescue team on the ground)</p> <p>Accommodations (lack of international standards or brands)</p> <p>Restaurants and Food Services (limited number of good catering)</p> <p>Little Awareness on International Market</p>

Opportunities	Threats
<p>Municipal administration priorities focused on tourism development with growing reputation of and commitment to the Svaneti DMO / increased role of Svaneti DMO</p>	<p>Natural Disasters caused by climate change, deforestation, non-proper land practices, urban planning and new infrastructure projects, mainly with large or medium size HPPs</p>
<p>Successfully implemented international events - highlander, freeride, proposition to host FWT top events in 2024-2025, that will make Svaneti top freeride destination</p>	<p>Climate change and environmental degradation threaten habitats and create risks of new geological, glaciological and hydrological hazards</p>
<p>Government's intention to explore and invest in a new ski-resort development between Lentekhi-Oni municipalities</p>	<p>Uncontrolled urban development and ongoing constructions in historical districts and urban heritage</p>
<p>Airgateway extension - Adding a new runway and new terminal at Mestia airport, which was announced by the national authorities</p>	<p>Regional political instability</p>
<p>Development of walking, cycling and horse-riding tours</p>	<p>Competitors developing and taking more of the market share</p>
<p>Mountain-Hut-Rescue concept development</p>	
<p>Development of ecotourism and community-based tourism</p>	
<p>Interest in holding cultural, sports, international and local events</p>	
<p>The potential of creating youth camps</p>	
<p>Increased international connectivity at Kutaisi Airport</p>	
<p>Programs for the development of new resort areas</p>	
<p>Local and international grant programs</p>	
<p>Development of tourist information centers</p>	

ANNEX

List of Desk Research Documents

1. GRETA documents and information including, but not limited to:
 - a. Branding Strategy for the destination Svaneti
 - b. Baseline Study
 - c. GRETA third annual report
 - d. Svaneti DMO Professional Capacity Needs Assessment ARC Report
 - e. Report of the Tbilisi Workshop of all Georgian DMOs dedicated to collecting DMO feedback for the draft tourism law
 - f. Stakeholders meetings (4 meetings) - minutes, summaries, participants lists, notes and illustrations (screen-shots) of the online meetings with the experts and stakeholders
 - g. Technical Reports provided by the specific experts (3 reports)
 - h. Thematic Maps in GIS formats: hiking trails, priority climbing zones with ski-touring lines and ski-lifts zones, selected cultural heritage monuments of high touristic values, historic communities and valleys, main roads and infrastructure, positioning of Georgia and its potential tourism source countries.
2. Literature/ Document/ Data at **regional level**, including, but not limited to:
 - a. Upper Svaneti Local Development Strategy (2022-2027)
 - b. Mestia Municipality 2022-2027 Local Development strategy
 - c. Strategy on Development of the Mountainous Regions of Georgia for 2019-2023
 - d. [Political-Economic Transition in Georgia and its implications for tourism in Svaneti](#), Georgia; FHGR (previously HTW)
3. Literature/ Document/ Data at **national level**, including, but not limited to:
 - a. COVID-19 Tourism Recovery Strategy for Georgia: Regenerating Tourism' New Potential 2021–2030
 - b. Georgian Tourism Development Strategy 2025
 - c. Agriculture and Rural Development Strategy of Georgia 2021-2027
 - d. Georgia Regional Development Program (2018-2021)
 - e. Georgia Mountain Settlements Development Strategy (2019-2023) and Action Plan (2019-2020);
 - f. Development Strategy for the Samegrelo-Zemo Svaneti Region (2014-2021)
 - g. Law of Georgia on the Development of Mountainous Regions (2015)

Map List

#	Map Name/File name	Print size sm	Map Scale	Notes
1	SVANETI - Existing and planned Hiking Trails/ SVANETI_100k - Existing and planned Hiking Trails.jpg	140X74.5sm	1:100 000	Most detailed map, based on 1:100 000 scale topographic charts, with all available and planned Hiking Network Segments. Hiking network segments are given in different colours according to the hardness. Separately with the red line are highlighted segments. Those segments cross all the Svaneti. We call it the Axial Trans Svaneti Route. In the supplementary table are given recommended routes with all necessary information for travellers.
2	SVANETI - Hiking Trails and Touristic Infrastructure/ SVANETI_200k - Hiking Trails and Touristic Infrastructure.jpg	65X40sm	1:200 000	Map is based on a 1:200 000 scale general map. Compact version of #1 map. Suitable for planning and reporting due to its compact size comparing # 1 map.
3	SVANETI_200k - Roads- Power supply and Mineral deposits/ SVANETI_200k - Roads- Power supply and Mineral deposits.jpt	65X40sm	1:200 000	Map is based on a 1:200 000 scale general map. Based on the provided information on the physical basemap we put the current condition of the main road and main power supply lines.
4	Location of Svaneti/ Svaneti_A5_3000K_General.jpg	21X15sm	1:3000000	Location of Svaneti on the map of Georgia
5	Major Tourist Attractions and Infrastructure of Svaneti / Major Tourist Attractions and Infrastructure of Svaneti.jpg	26X15sm	1:500000	Map based on 1:500 000 scale general map. Highlighted community names and major tourist attraction places.
6	Flight Time map from			The map shows the approximate flight time (in hours) from Georgia

	Georgia/Flight Time map from Georgia.jpg			to any other directions. http://emptypipes.org/2015/07/13/flight-times-map/
7	Flight_Kutaisi_airport Flight_Tbilisi_airport			The map below provides an overview of all flight routes from Tbilisi and Kutaisi airports. https://www.flightconnections.com/

Hiking Route List

#	Route Name	Season	start_elev	high_elev	marshut_type_eng	track_type_eng	circular_type_eng	difficulty_eng
1	Mestia - Hatsval - Zuruld-Heshkil	1 June - 30 October	1450	2262	Hiking trail	Unpaved road,path	oneway, circular	intermediate
2	Mestia - Chilaadi glacier	15 July - 15 October	1450	1950	Hiking trail	Unpaved road,path	oneway	intermediate
3	Mestia-ckhakvzagar- Korulda lakes - Mestia	1 June - 10 November	1400	2730	Hiking, Horse riding	Unpaved road,path	oneway	intermediate
4	Mestia - Gul pass - Bechvi (bagvdanar, mazeer)	1 June - 30 October	1400	2740	Hiking, Horse riding	Unpaved road,path	draught	Ver.1 intermediate ver.2 advanced
5	Mestia - Mulakh (Majvdier, Chvabian, Tsadldash, Zhaabesh)	1 June - 30 October	1397	1950	Hiking, Horse riding	Unpaved road,path	draught	easy
6	Lenjaar (lemsia) - Heshkil	1 June - 30 October	1424	1870	Hiking, Horse riding	Unpaved road,path	oneway, draught	easy
7	Lenjaar (Heshkil) - M.Zuruldi	1 June - 30 October	1870	2348	Hiking, Horse riding	Unpaved road,path	draught	intermediate
8	Lenjaar (Heshkil) - Ieli - Tsvirmi	1 June - 30 October	1870	1950	Hiking, Horse riding	Unpaved road,path	draught	easy
9	Lenjaar(Heshkil) - Latli (Lakhudsh)	1 June - 30 October	1870	1962	Hiking, Horse riding	Unpaved road,path	draught	easy
10	Lenjaar (Lemsia) - M.Tebdiash - Lenjaar(Sol)	1 June - 30 October	1424	2553	Hiking, Horse riding	Unpaved road,path	circular	unmarkable, intermediate
11	Latli (Lakhudsh) - Mkheer - Latli (Matskhvarish)	1 June - 30 October	1350	2490	Hiking, Horse riding	Unpaved road,path	circular	intermediate
12	Latli (Matskhvarish) - Mkher- Lentekh	1 June - 30 October	1300	3590	Hiking trail	Unpaved road,path	draught	advanced
13	Mulakh - Sgimzagar - Iphar (Hadiish) . Mulakh - Sgimzagar - Tsvirmi.	1 June - 30 October	1613	2475	Hiking, Horse riding	Unpaved road,path	draught	intermediate
14	Tsvirmi - Iphar (Bogresh, Nakiphar , Zegan) - Lasil pass - Lentekh (Mutsvdi, Tvib, Tekal, Sakdar)	1 July - 30 October	1910	3086	Hiking trail	Unpaved trail,rocks	draught	advanced
15	Latli (Matskhvarish) - Ipkh - Bechvi (Dol)	1 May - 30 October	1300	1700	Hiking, Horse riding	Unpaved road,path	oneway, draught	easy

16	Mulakh (Lakhir - Zhaamush - Cholash) - Tvibeer glacier - Mulakh (Zhaabesh)	1 June - 30 October	1700	2800	Hiking trail	Unpaved road,path	circular, draught	advanced
17	Iphaar (Hadiish) - Chkhurnier pass - Kaal (Iphrall, Lalkhor, Davber)	1 June - 30 October	1953	2722	Hiking, Horse riding	Path	draught	intermediate
18	Kaal (Davber) - Latphar - Cholur (Chvelph)	1 June - 30 October	1780	2830	Hiking, Horse riding	Unpaved road,path	draught	intermediate
19	Kaal (Iphral, Lalkhor, Davber) - Ushgul (Murkmel, Chaazhash, Zhvibiani, Lamhurish)	1 May - 30 November	1741	2160	Hiking, Horse riding	Unpaved road,path	draught	easy
20	Lentekhi - M.Goldash - Sakdar	1 June - 30 October	730	2869	Hiking, Horse riding	Unpaved road,path	oneway	intermediate
21	Ushgul - Latphar pass - Cholur (Mam)	15 July - 15 October	2100	2830	Hiking, Horse riding	Path, bridle path	oneway	intermediate
22	Ushgul (Murkmel, Chazhash, Chvibian, Zhibian, Lomjurish) - Shkhara glacier	1 June - 30 October	2081	2520	Hiking, Horse riding	Unpaved road,path	oneway	easy
23	Chikharesh (Mged) - Kelida pass - Racha (Likher, Urav)	1 June - 30 October	833	3036	Hiking, Horse riding	Path	draught	intermediate
24	Tsaan (Zaskhv) - Neshka pass - Vatsistsveri pass-Brili	1 June - 30 October	1835	2909	Hiking, Horse riding	Path	oneway	intermediate
25	Etser - Par- Par (gheshder)	1 June - 30 October	1450	1965	Hiking, Horse riding	Unpaved trail	draught	easy
26	Nakra - Kichkhuldash - M.Kva; 2.2 Tavrar - M.Kva;2.3 Tsaler - M.Tsva	1 June - 30 October	1600	2890	Hiking, Horse riding	Path	circular	intermediate
27	Par (Gheshder) - Nakra (Nak)	1 June - 30 October	1410	1700	Hiking, Horse riding	Unpaved road,path	draught	intermediate
28	Etser (Lantel) - Tskhumar (Svip)	1 May- 30 November	1390	1390	Hiking, Horse riding	Path, bridle path	draught	easy
29	Nakra - Leiraki Waterfall - Tavrani	1 June - 30 October	1648	2104	Hiking, Horse riding	Path	oneway	easy
30	Bechvi (Mazer) - M.Mezir - Etser (Chelir)	1 June - 30 October	1700	2557	Hiking, Horse riding	Path	oneway, draught	easy
31	Chuber (Laroka) - Memuli lake	1 June - 30 October	1235	2758	Hiking, Horse riding	Unpaved road,path	oneway	intermediate
32	Tschuber (Chube kar) - Khark lake	1 June - 30 October	930	2698	Hiking, Horse riding	Unpaved road,path	oneway	easy

33	Nakra (Nak) - Utvir pass - Chuber (Chube margh)	1 June - 30 October	779	2714	Hiking, Horse riding	Path	draught	intermediate
34	Bechvi (Dol) - M.Mezir	1 June - 30 October	1264	2285	Hiking, Horse riding		oneway, draught	intermediate
35	Bechvi(Ushkhvanar) - Ipkh - Latli (Matskvarish)	15 May - 30 October	1700	1550	Hiking, Horse riding	Unpaved trail	oneway	intermediate
36	Bechvi(Mazer) - Shdugvra waterfall - Ushba glacier	1 July - 15 October	1700	2575	Hiking trail	Unpaved trail	oneway	intermediate
37	Tskhumar - Chizhdi pass - Kheled (Mamanur)	1 June - 30 October	1125	3388	Hiking trail	Path	draught	advanced
38	Khaishd - Zhibe ved - Lake Toba	1 July - 30 October	1000	2823	Hiking trail	Path	draught	intermediate
39	Khaishd (Chubeved) - Laghamurashi range	1 June - 30 October	835	2978	Hiking trail	Path	oneway	advanced
40	Khaishd (Chube ved) - Lakamurashi range	1 June - 30 October	1127	2574	Hiking trail	Unpaved road,path	oneway	advanced

Svaneti Tourism Development Strategy and Action Plan Outline

5-Year Tourism Development Strategy

- a) Guiding principles
- b) Vision for the destination development
- c) Strategic Objectives
- d) Strategic Actions
- e) Targets and key performance indicators (economic goals, socio-cultural goal, environmental goal)

Action Plan

- a) Matrix of priority actions with roles and responsibilities
- b) The role of Svaneti DMO - activities, timeline, investment
- c) Key performance indicators and monitoring processes