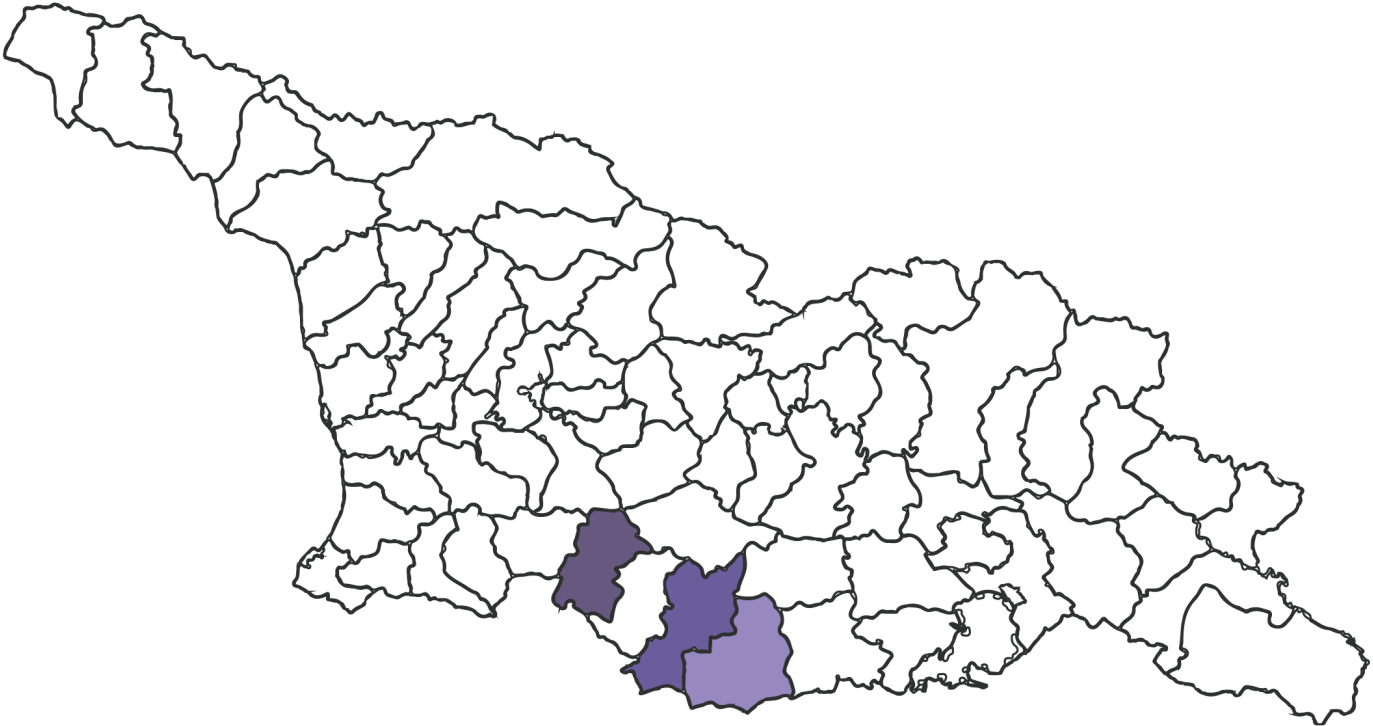




# ADVENTURE TOURISM VALUE CHAIN IN AKHALTSIKHE, AKHALKALAKI AND NINOTSMINDA MUNICIPALITIES

**USAID** UNITY THROUGH  
DIVERSITY PROGRAM  
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## 1. Introduction

The USAID Unity Through Diversity Program, implemented by UNA-Georgia, is a five-year initiative supported by USAID. The program aims to serve as a central hub for integrating ethnic and religious minorities into various aspects of Georgian society, including social, political, and economic spheres. As a subcontractor of UNA-Georgia, PMCG (Policy and Management Consulting Group) contributes to expanding and strengthening socio-economic connections between the majority and minority communities, with the overall objective of facilitating mutually beneficial business relationships.

Within the program, one component focuses on conducting value chain assessments in target ethnic and religious minority municipalities. These assessments involve mapping and analyzing selected high-priority value chains, one of which is adventure tourism in the municipalities of Akhaltsikhe, Akhalkalaki, and Ninotsminda. This value chain has been identified as having significant growth potential.

The tourism industry, in general, plays a crucial role in economic development and job creation, offering unique experiences and opportunities for both visitors and local communities. This value chain analysis aims to understand the dynamics of the adventure tourism industry in the municipalities of Akhaltsikhe, Akhalkalaki, and Ninotsminda, with a specific focus on identifying opportunities for sustainable growth.

Through a synthesis of desk and field research, this analysis covers the various stages, actors, and relationships involved in the delivery of tourism products and services. It seeks to identify obstacles that hinder the municipalities' ability to fully capitalize on their rich cultural heritage sites, breathtaking natural landscapes, and untapped tourism potential. Furthermore, the analysis aims to provide suggestions for addressing these challenges.

The analysis begins with an overview of the employed methodology. Section III provides a map and brief overview of the actors involved in the value chain of adventure tourism. Section IV reviews key statistical indicators from official sources, while section V explores the cultural, historical, and natural sites that the municipalities have to offer. Section VI delves into the implications of visitor statistics for the protected areas.

Subsequently, sections VII-X examine the roles, existing challenges, and opportunities for various players in the adventure tourism industry, namely accommodation providers, food and beverage providers, tour operators, guides, activity providers, and souvenir and craft producers. Section XI evaluates the state and accessibility of transport in the municipalities, followed by section XII, which highlights key stakeholders. This is followed by an in-depth SWOT analysis of the municipalities in section XIII, and finally, section XIV concludes the analysis with a list of recommendations.

This analysis aims to provide valuable insights and recommendations that can contribute to tourism's sustainable development, and specifically adventure tourism, in Akhaltsikhe, Akhalkalaki, and Ninotsminda municipalities. By addressing challenges, capitalizing on opportunities, and fostering collaboration, the potential of these regions can be unlocked - promoting economic growth and creating a positive impact on visitors and local communities.

## 2. Methodology

A comprehensive methodology combining desk and field research studies was employed to conduct the Adventure Tourism Value Chain Analysis in the municipalities of Akhaltsikhe, Akhalkalaki, and Ninotsminda.

Notably, the value chain analysis was preceded by evaluating the priority areas of various tourism services specific to the target municipalities. The goal of the study was to determine the status of the sector development and to identify its highest growth potential. The assessment encompassed five key factors: natural resources, cultural resources, tourism infrastructure, general infrastructure, and regional tourism appeal. Using a combination of qualitative and quantitative data, each category was assigned points to identify municipalities with significant potential for tourism development.

In the second stage of the prioritization, additional extensive desk research was conducted, and validation workshops were organized to ensure that the selected products had high potential in terms of competitiveness, systemic impact (through job creation, development of potential linkages with national supply chains and potential for integrating ethnic minorities in the VC), and feasibility (alignment with the national, regional, and municipal priorities).

The preliminary prioritization revealed that adventure tourism emerged as a prominent strength and opportunity across all three municipalities. Consequently, the subsequent value chain analysis of the tourism sector primarily emphasizes adventure tourism while also considering other significant aspects of the tourism industry.

### 2.1 Desk Research

The desk research phase aimed to provide an overview of the tourism sector at the national and regional levels, utilizing available statistical data. The primary sources of information included government agencies such as the National Statistics Office of Georgia (Geostat), the Georgian National Tourism Administration, and the Agency of Protected Areas. Various open sources and online platforms were also utilized, including tourism-related websites, industry reports, and regional tourism portals. The data from the Destination Management Organization (DMO) and the Akhaltsikhe Castle were also incorporated into the analysis.

Significant emphasis was placed on the data obtained from open sources and the Geostat database. The Geostat data provided key tourism indicators, including general sector statistics, the number of international and domestic visitors, the trends and dynamics of the last several years, the average length of stay, etc.

Through this extensive desk research, the main tourism assets of the target municipalities were identified. The analysis involved mapping the tourism sector service providers, including existing accommodation units, food service establishments, adventure and cultural tourism services, transportation options, entertainment venues, and souvenir production. Additionally, the research identified important external actors such as municipal tourism service centers, public entities, international partner/donor organizations, and financial institutions.

Overall, the combination of open sources, the Geostat data, and input from the DMO and other relevant entities ensured a comprehensive understanding of the tourism sector in the target municipalities, contributing to the subsequent stages of the value chain analysis.

### 2.2 Field Research

Following the desk research phase, a comprehensive questionnaire was developed to gather detailed information on the existing services, visitor profiles, challenges, and opportunities in the target

municipalities. The questionnaire included specific questions tailored to different types of tourism service providers, including accommodation providers, food service establishments, tour agencies and guides, and adventure tourism providers. Additionally, general questions were integrated to collect information on visitor types, the labor force, income generated from tourism-related activities, relationships with local product suppliers and other tourism service providers, transportation, infrastructure, sources of finance, and managerial skills. The questionnaire was designed to be diversity-sensitive, capturing differences, relations, division of labor, roles, and practical needs of various groups such as religious minorities, women, and youth. It also addressed aspects of access, control, and distribution of resources.

Respondents were selected from a list of contacts obtained from the Destination Management Organization (DMO) to ensure a comprehensive representation of available resources. In addition to the private sector actors, interviews were conducted with the representatives of the Government Office of the Akhaltsikhe Municipality and the Head of the Akhaltsikhe Castle to gather further insights. The table below (Table 1) summarizes the types of local representatives interviewed during the analysis.

*Table 1: List of conducted interviews*

Tourism direction	The number of interviewed respondents engaged in respective tourism directions
Adventure tourism service providers	7
Accommodation service providers	7
Food service providers	9
Cultural tourism service providers	3
Souvenir producers	2
Other Stakeholders (Government and Public Sector Representatives)	3

*\*Note: Some respondents operated in more than one tourism direction. A total of 16 interviews were conducted.*

Based on the collected qualitative data, the report provides a detailed description of the tourism service process, highlighting different value chain actors, tourism attractions, the labor force, marketing strategies, and external stakeholders. The major strengths, weaknesses, opportunities, and threats identified during the analysis are summarized in the SWOT analysis. This is followed by the recommendations section of the report, which focuses on the development of the value chain, with particular attention to integrating minorities into the value chain and exploring the potential of integrating the regional value chain into the national context.

### 2.3 Research Limitations

The main limitation encountered during the research conducted for this report was incomplete statistical information: The availability of comprehensive statistical data at the municipality and community level in Georgia is limited. Additionally, the ongoing impact of the COVID-19 pandemic resulted in the suspension of the international visitor survey, which could have provided valuable insights into the tourism sector. This suspension lasted from the beginning of 2020 until the end of 2022.

### 3. Value Chain Actors and Map

Tourism plays a significant role in the socio-economic development of regions worldwide, contributing to job creation, revenue generation, and the preservation of cultural and natural heritage. The municipalities of Akhaltsikhe, Akhalkalaki, and Ninotsminda in Samtskhe-Javakheti, Georgia, are no exception, as they boast a rich tapestry of attractions and a significant potential for tourism growth. Among the three municipalities, Akhaltsikhe claims a relatively larger number of visitors due to the Akhaltsikhe Castle complex, which has become a well-known tourist attraction over the last decade. Meanwhile, Ninotsminda and Akhalkalaki remain less popular among both domestic and international visitors. This section provides a brief insight into the production process of tourism in these municipalities, with a particular focus on adventure tourism as a key driver of economic and experiential development.

Adventure tourism, a rapidly growing segment within the broader tourism industry, offers unique and thrilling experiences that attract adventure-seeking travelers. It encompasses a range of activities such as hiking, mountain biking, rock climbing, horse-riding, and white-water rafting. The preliminary evaluation preceding this value chain analysis has identified the significant potential of adventure tourism in Akhaltsikhe, Akhalkalaki, and Ninotsminda. This is because these regions have suitable natural attributes for the development of such activities. This analysis aims to identify efficient and actionable ways to unlock this potential and contribute to the development of this exciting niche.

The production process of tourism involves a multifaceted approach encompassing a diverse set of stakeholders, infrastructure development, safety considerations, marketing strategies, and collaborations among various actors in the value chain. This section provides an overview of this process in the context of the target municipalities, shedding light on the interplay of factors that contribute to the successful production and promotion of tourism experiences.

Central to the production process is the development of adventure tourism products tailored to the unique natural and cultural assets of the region. This involves identifying and assessing potential adventure tourism attractions, designing engaging experiences, and implementing plans to ensure visitor satisfaction and safety. The infrastructure and facilities required to support adventure tourism, including transportation networks, accommodation options, and amenities, are also crucial components.

Moreover, sustainability is a vital consideration in adventure tourism. Efforts to minimize the ecological impact of activities and promote responsible practices are key to preserving the natural environment and ensuring the long-term viability of tourism in the municipalities. Similarly, preserving and promoting local culture, traditions, and heritage contribute to a more authentic and enriching adventure tourism experience.

Collaboration and partnerships among stakeholders are instrumental in the production process of tourism. Engaging local communities, private sector actors, government agencies, and non-governmental organizations fosters a collaborative ecosystem supporting product development, marketing initiatives, and sustainable growth.

The production process of tourism in the municipalities of Akhaltsikhe, Akhalkalaki, and Ninotsminda involves a wide range of stakeholders, each playing a crucial role in creating and delivering tourism experiences. Some of the key stakeholders include:

- **Accommodation providers**, including hotels, guesthouses, and homestays, offer lodging options to adventure tourists. They ensure comfortable and convenient stays, complementing the overall adventure tourism experience. Small guesthouses, in particular, provide unique cultural experiences, traditional cuisine and hospitality, and authentic interactions with visitors, enriching the adventure,

cultural, gastronomic, and agricultural tourism experiences. However, limitations such as insufficient capacity need to be addressed to meet the demands of larger groups.

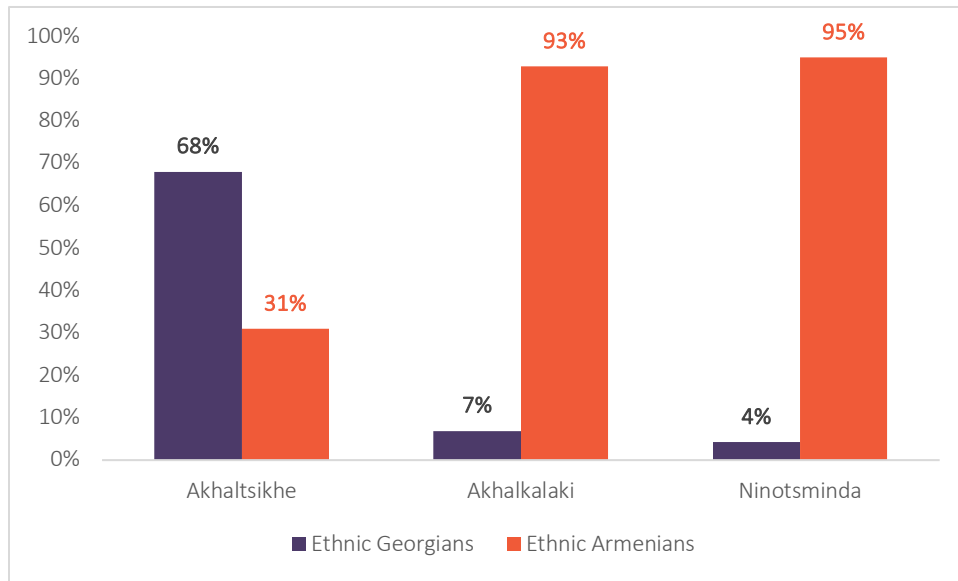
- **Tour operators** specialize in designing and organizing tourism packages and experiences. They collaborate with local service providers, such as accommodation providers, transportation companies, and activity providers, to create comprehensive adventure tourism offerings. Expanding the network of partner tour operators and strengthening existing relationships is a marked priority for respondents in the target municipalities.
- **Activity providers** play a significant role in offering a variety of adventure tourism experiences, such as hiking guides, rafting companies, and cycling tours. However, the number of certified activity providers in the target municipalities is limited, presenting an opportunity for growth and diversification.
- **Transportation providers** are vital in facilitating the movement of adventure tourists within and between the municipalities. While the respondents regard the municipal transport services within Akhaltsikhe and nearby villages as adequate, expanding transportation options and car rental services can enhance convenience for visitors. As revealed during the interviews, municipal transportation in Ninotsminda and Akhalkalaki is more problematic.
- **Government agencies** are responsible for setting policies, regulations, and guidelines related to adventure tourism. They collaborate with local communities, tour operators, and other stakeholders to ensure safety, sustainable practices, and the overall development of the sector. The Destination Management Organization (DMO) was set up in 2018 to facilitate and boost the development of the tourism sector in the region. Despite positive views on the contributions of the DMO among respondents, they highlight the need for increased human and financial resources for the organization.
- **International partners** provide support locally to the tourism value chain actors; It is crucial for them to collaborate with local government organizations, the civil sector, and the local businesses to identify the most efficient ways to direct their resources.
- **Other Stakeholders**, such as VET institutions and financial institutions that provide access to important resources for the VC, as well as other institutions directly or indirectly supporting the development of the sector.

Active interactions among these and other stakeholders are necessary to foster a vibrant ecosystem for tourism to thrive. Collaborations can lead to the creation of unique and immersive experiences, the preservation of local culture, and the economic growth of municipalities.

It is important to acknowledge the demographic differences among the municipalities in the region. While Akhalkalaki and Ninotsminda have a majority population of Armenian descent (93% and 95%, respectively), the same cannot be said for Akhaltsikhe municipality, where the demographic composition differs (figure 1). However, the interviews conducted indicate that ethnic and language differences do not significantly impact the daily life of the region. Despite some language barriers, none of the respondents reported specific difficulties or instances of discrimination faced solely by ethnic minorities.



Figure 1: Ethnic composition of the municipalities of interest, 2014 data



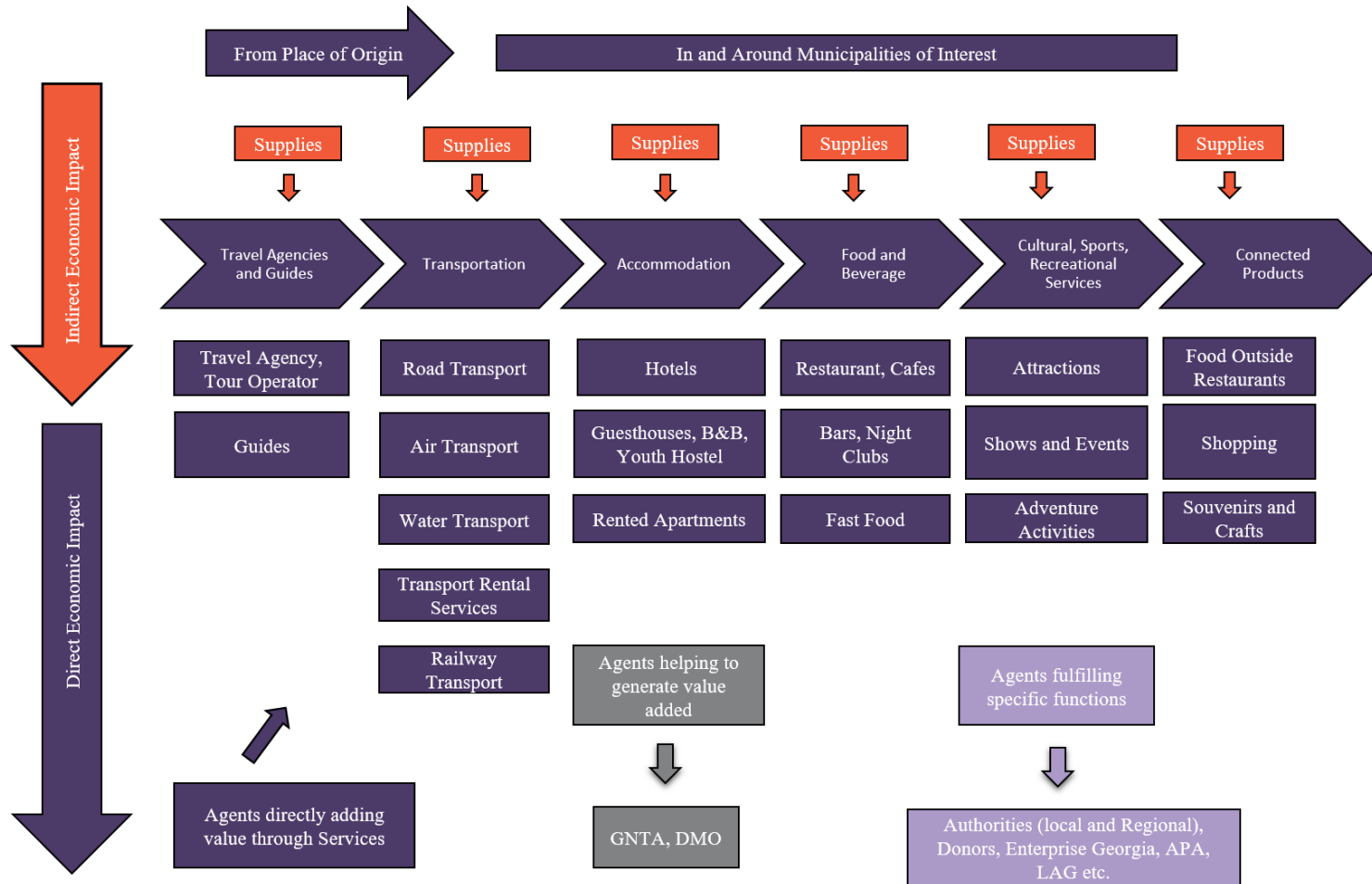
Source: Geostat 2014 Census data

Moreover, it was noted that the majority of the younger population in the region already speak Georgian or are actively engaged in intensive language courses. The respondents in Akhaltsikhe mentioned that the scarcity of Georgians in the municipality makes it challenging for them to practice the language. Similarly, the representative of Doukhobor, an ethnic group in Ninotsminda, indicated that the younger generation speaks perfect Georgian. However, there remains a language challenge among the older population.

In the subsequent sections, we will delve deeper into each stakeholder's specific role, contributions, challenges, and opportunities, allowing for a comprehensive exploration of the adventure tourism value chain in Akhaltsikhe, Akhalkalaki, and Ninotsminda municipalities.

The figure below (Figure 2) shows the map of players involved in the value chain of tourism.

Figure 2: Tourism Value Chain Model<sup>1</sup>



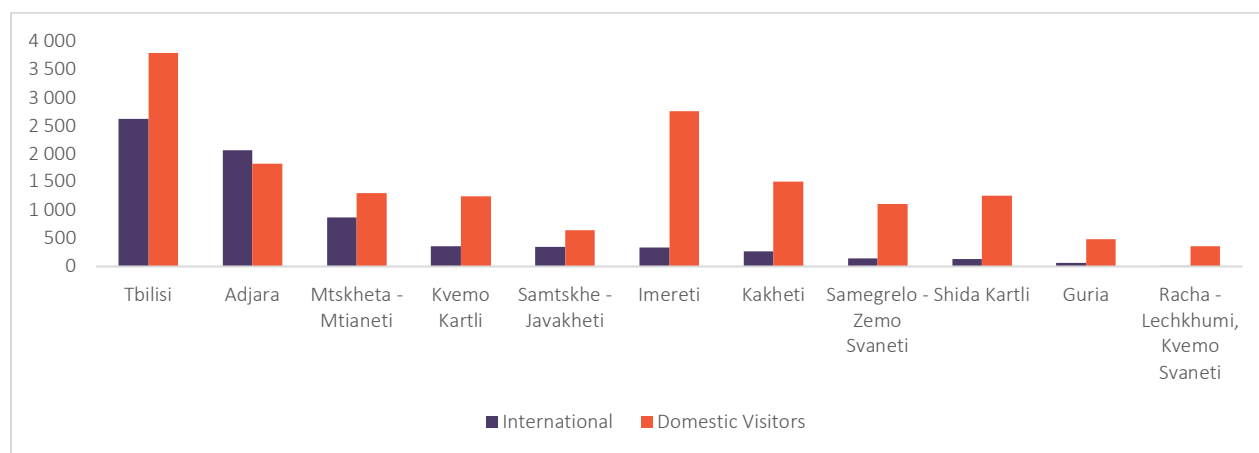
<sup>1</sup> Table produced by the Author based on Reports - Sustainable Tourism for Development, (UNWTO 2013); Tourism Value Chain: Analysis and Practical Approaches for Development Cooperation Projects (GIZ, 2020), Tourism Satellite Account of Georgia, (Geostat 2019).

#### 4. Visitors in the Target Areas

In 2022, Samtskhe-Javakheti welcomed approximately 1 million international and domestic visitors. International visitors, amounting to 352,839 individuals, were responsible for 35% of the visits. This figure represents 7.7% of all international visitors to the country. Samtskhe-Javakheti ranks fifth among the 11 regions in terms of the number of international visitors.

As for the domestic visits, Samtskhe-Javakheti received 648,744 visitors, accounting for 4% of the total visits. Among the regions, it ranks ninth in the number of domestic visits (Figure 3).

Figure 3: International and Domestic Visits in thousands, 2022



Source: National Statistics Office of Georgia

Unfortunately, there is currently no data available regarding international visitors at the municipality level, but data is available for domestic visitors. Instead of measuring international visitors at the municipality level, the methodology allows for measuring them at specific places within the Samtskhe-Javakheti region. In 2022, Borjomi (including Likani, Mineral Waters, Green Monastery, Timotesubani, and the National Park) attracted 291,164 international visitors. Similarly, Bakuriani hosted 59,349 international visitors, and Vardzia (including Vanis Kvabebi, Safara, Khertvisi, etc.) had 27,176 international visitors. Akhaltsikhe, including Rabati, attracted 25,503 international visitors.<sup>2</sup> Unfortunately, data on international visitors for Akhalkalaki and Ninotsminda is currently unavailable.

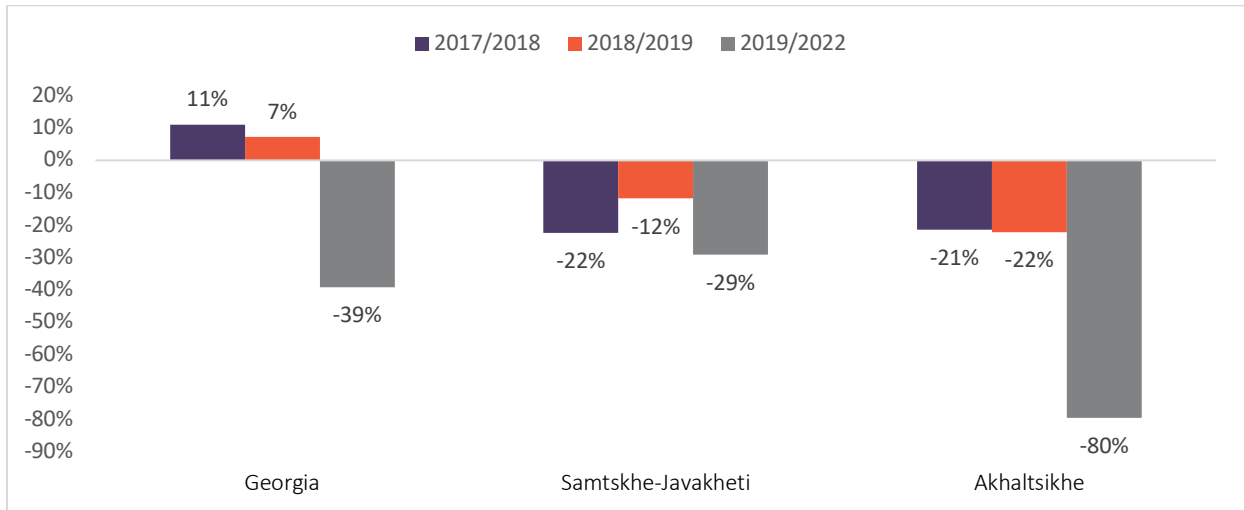
When it comes to domestic visitors, there are notable differences among the municipalities within Samtskhe-Javakheti. In 2022, among the three municipalities of interest, Akhaltsikhe counted the highest number of domestic visits at 24,755. Akhalkalaki Municipality followed with 20,730 visits, and Ninotsminda Municipality had 8,977 visits. These numbers are significantly lower compared to other municipalities in the region. For reference, Borjomi hosted 215,345 domestic visitors, while Aspindza had 40,578.

An interesting trend emerges when comparing the growth rates of the Samtskhe-Javakheti region with national statistics. The number of international visits in Georgia showed consistent growth over two consecutive years, increasing from 6.5 million in 2017 to 7.7 million in 2019. In 2022, the number of international visits recovered to 61% compared to 2019. However, the region of Samtskhe-Javakheti

<sup>2</sup> According to the data obtained from the administration of the Akhaltsikhe Castle Rabati, in 2022, the castle hosted 41,016 international visitors and 50,224 domestic visitors. The number of international visitors recovered to 48% compared to 2019, while domestic visitors recovered to 68%. Statistics for 2020 and 2021 are unavailable due to the pandemic.

experienced a significant decline during the same period, with the number of international visits dropping from 727,000 in 2017 to 498,000 in 2019. Nevertheless, in 2022, the recovery rate of Samtskhe-Javakheti was better compared to the national average, reaching 71% (Figure 4). The most substantial decline in visitor numbers was observed in Akhaltsikhe<sup>3</sup>, where the number of international visitors decreased from 204,000 to 26,000 in 2022.

Figure 4: The dynamics of international visitors, 2018-2022



Source: National Statistics Office of Georgia

In relation to the number of visits, it is also worth considering the average duration of stay in Samtskhe-Javakheti. In 2022, international visitors spent a total of 1 million nights in the region, accounting for only 3% of the total nights spent in Georgia. International visitors' average length of stay was 3.2 nights (Figure 5). Conversely, domestic visitors contributed significantly to the region's overnight stays, with a total of 2.2 million nights spent in Samtskhe-Javakheti, representing 7% of the overall domestic overnight stays. Similarly, the average length of stay for domestic visitors was 3.2 nights (Figure 6).

<sup>3</sup> As measured by the number of visitors within the International Visitor Survey indicating to having visited Akhaltsikhe (including Rabati)

Figure 5: Number of nights spent by international visitors and their average length of stay, 2022

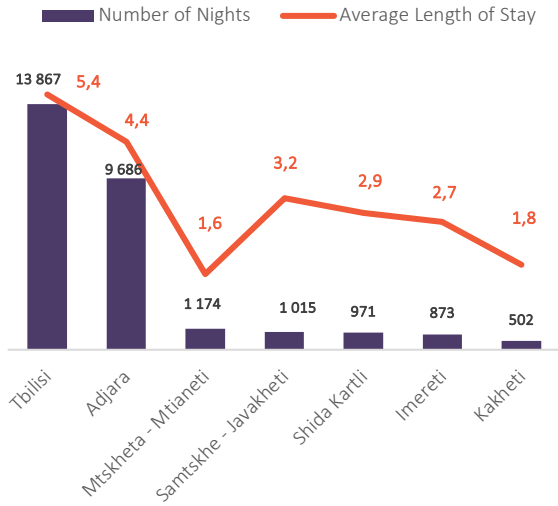
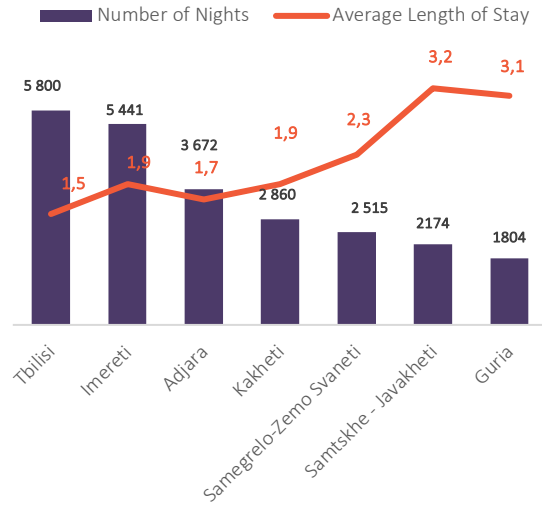


Figure 6: Number of nights spent by domestic visitors and their average length of stay, 2022



Source: Statistics Office of Georgia

The differences in tourism-related activity among the regions are highlighted when considering the reviews and opinions posted on Tripadvisor. Akhaltsikhe has generated a total of 1,393 reviews and opinions, while Akhalkalaki and Ninotsminda have only 24 and 20, respectively.<sup>4</sup>All three municipalities have generated a mere 0.4% of reviews and opinions posted about Georgia on the website (329.773 in total as of June 2023).

<sup>4</sup> Tripadvisor, web, accessed June 21<sup>st</sup>, 2023.

## 5. Tourist Locations and Assets

The Akhaltsikhe, Akhalkalaki, and Ninotsminda regions offer a plethora of attractions that cater to a diverse range of interests. In recent years, birdwatching gained momentum as a popular activity in these municipalities, attracting nature and wildlife enthusiasts. Alongside the region's rich history and anthropology, visitors can indulge in the captivating experience of observing a variety of bird species in their natural habitats. Whether one's passion lies in exploring nature, delving into history, or immersing in cultural anthropology, these municipalities provide various experiences that captivate and engage travelers.

### 5.1 Historical, Cultural, and Religious Attractions

The following section highlights some of the key cultural and religious sites in each municipality, displaying the unique heritage and charm of the region.<sup>5</sup>

#### **Akhalsikhe Municipality:**

- **Rabati Castle:** one of the most iconic landmarks in the region, Rabati Castle is a magnificent fortress that showcases a blend of different architectural styles, including Georgian, Ottoman, and European influences. Within its walls, visitors can explore a mosque, a church, a citadel, a museum, and various courtyards, immersing themselves in centuries of history.
- **Sapara Monastery:** nestled amidst lush greenery, Sapara Monastery is a peaceful and spiritual retreat. Dating back to the 13th century, this monastery offers breathtaking views of the surrounding landscapes and features beautifully adorned frescoes and ancient religious artifacts.
- **Tsriokhi Castle:** located in the village of Atskuri, Tsriokhi Castle (also referred to as Tamari Castle) is a medieval fortress that has withstood the test of time. The castle offers a glimpse into the region's medieval past, with its towering walls, watchtowers, and panoramic views of the surrounding countryside.

Some more cultural attractions located in the municipality include Arkistsikhe (citadel), Atskuri Castle, Baiebi complex, Moktseva Castle, Vale Church of Virgin Mary, and Sakuneti St. George Church.

#### **Akhalkalaki Municipality:**

- **Abuli Fortress:** perched atop a hill, Abuli Fortress is an ancient stronghold that played a significant role in the region's history. Visitors can explore its ruins, walk along the ancient walls, and imagine the tales of battles and conquests that unfolded within its confines.
- **Akhalkalaki Castle and City Ruins:** a historical site that captures the imagination with its ancient ruins and architectural remnants. The castle complex features a series of interconnected structures, including defensive walls, watchtowers, and courtyards.

Several other cultural sites in the municipality include Bavri Church, Kumudro Church, Baraleti Church of Virgin Mary, Ghrtla Georgian Church, Baraleti Armenian Church, and Shaori Fortress.

#### **Ninotsminda Municipality:**

- **Gandzani Church:** located in Ninotsminda, is an ancient Georgian Orthodox church that dates back to the 13<sup>th</sup>-14<sup>th</sup> century. The church features distinctive architectural elements and ancient writings on the walls.

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<sup>5</sup> The source of all historical information in this section is the online portal of cultural heritage – [www.memkvirdreoba.gov.ge](http://www.memkvirdreoba.gov.ge);

- **Tontio St. George Church:** 11<sup>th</sup>-century historic Georgian Orthodox church holds significance for its architectural style and religious importance. With its unique design and historical value, the church offers visitors a glimpse into the region's cultural and spiritual traditions.

Other cultural attractions located in the municipality include Tontio Pentagonal Bridge, Jigrasheni Armenian Church, Phoka Nunnery of St Nino, and Aspara Church Ruins. These and some unlisted historical, cultural, and religious attractions present an opportunity for the region to appeal to a distinct group of history enthusiasts.

Finally, it is essential to acknowledge the significant draw of the *Doukhor culture* prevalent mostly in Gorelovka and Orlovka villages of the Ninotsminda municipality. This captivating cultural heritage piques the curiosity of a substantial number of travelers. The Doukhor traditions, rituals, and way of life offer a unique and enriching experience that adds to the region's tourist appeal. There are several sites around the village where the locals take visitors to showcase their history. However, they mostly collaborate with private guides and have no online presence, significantly limiting their visibility. Currently, one of the predominant challenges faced in the villages is the absence of gas infrastructure. According to the interviewee, Orlovka and Gorelovka are among five villages that still have this problem, along with Ephremovka, Zhdanovi, and Sameba. All five villages have a majority population of ethnic minorities.

## 5.2 Natural Sites

Beyond its captivating cultural heritage, the municipalities of Akhaltsikhe, Akhalkalaki, and Ninotsminda present a bountiful array of nature and wildlife attractions, creating an ideal environment for tourists to immerse themselves in the area's natural splendor. The municipalities offer a myriad of opportunities for engaging with the stunning landscapes, making it a haven for outdoor enthusiasts seeking diverse activities amidst breathtaking nature. From hiking and trekking to birdwatching and scenic exploration, these regions showcase an abundance of *nature and wildlife attractions*.<sup>6</sup>

### **Akhaltsikhe Municipality:**

The main niche for the municipality of Akhaltsikhe is the wealth of cultural and historical landmarks. As the municipality with the most options for accommodation, many tourists choose to stay in the city and do day trips to various locations in nearby municipalities, including but not limited to Adigeni, Vardzia, Saro, Khertvisi, and Aspindza.

However, there are still opportunities for eco-tourists to engage in various activities. Notably, this municipality marks the starting point of a 73 km long hiking route in the village of Persa and extends all the way to Tabakini, near the city of Zestaponi. This scenic route allows hikers to challenge themselves to a 4-day hiking experience and immerse themselves in the beautiful landscapes of the region.

### **Akhalkalaki Municipality:**

Akhalkalaki Municipality boasts several national reserves and parks perfect for nature lovers. The Didi Abuli Mountain (10 km hike) on the Abul-Samsara Ridge is one of the more popular hiking destinations in the municipality. Tetrobi National Park, Sulda National Park (with a 5 km hiking trail), and the Kartsakhi Managed Reserve offer diverse ecosystems and opportunities for activities such as pedestrian and cycling trails for hiking, horse riding, picnics, and birdwatching. Additionally, the municipality is home to picturesque lakes, including Levani Lake (with a 24 km hiking route) and Panda Lake (28 km hiking route)

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<sup>6</sup> Information in this section was obtained from the official websites of the Javakheti Protected Areas ([www.apa.gov.ge](http://www.apa.gov.ge)) and the DMO ([www.dmo.ge](http://www.dmo.ge)), accessed on June 22, 2023.

on the Abul-Samsara Ridge, and Kartsakhi Lake (with a 3 km long hiking trail), where visitors can enjoy serene surroundings, birdwatching, and engage in water-based activities.

### **Ninotsminda Municipality:**

Ninotsminda Municipality is rich in parks that highlight the region's natural beauty. Javakheti National Park, Madatapa National Park, Khanchali National Park, and Bughdasheni National Park offer diverse landscapes, including mountains, forests, and wetlands. The latter features a 2 km long hiking trail around the Bughdasheni Lake located in the park. These parks provide opportunities to engage in a range of outdoor activities such as birdwatching, hiking, picnics, camping, horse riding, and bicycle touring.

Additionally, the municipality boasts an abundance of lakes, including Khanchali Lake (with a 3 km pedestrian and cycling hiking trail nearby), Madatapa Lake (featuring a 22 km long pedestrian, cycling, and equestrian hiking trail), Saghamo Lake, Paravani Lake, and Dromatarebine Lake (25 km hiking trail), offering opportunities for water-based recreation and scenic views. The Javakheti National Park and Khanchali Lake are also connected with a beautiful 15 km long pedestrian and equestrian hiking trail that goes through the Tiger Canyon.

The DMO is currently collaborating with the Municipality to itemize all the attractions and opportunities that exist for tourists in the Municipality of Akhaltsikhe.

The Javakheti National Park and the managed reserves in Akhalkalaki and Akhaltsikhe municipalities, including Sulda, Kartsakhi, Madatapa, Khanchali, and Bughdasheni, are under the management of the Javakheti Protected Areas agency. Visitors can visit their office in the city of Akhalkalaki. The agency provides various services and equipment rentals to enhance visitors' experiences, including:

- Tent - 10 GEL
- Backpack - 5 GEL
- Sleeping Bag - 5 GEL
- A conference hall that can accommodate up to 22 people for a fee of 120 GEL, offering a suitable venue for meetings, workshops, or group activities.
- A site to set up a tent - 5 GEL.
- Picnic site with tables - 15 GEL; for school and university students, the rental fee is discounted to 10 GEL.
- Snowshoes - 15 GEL, and plus 10 GEL per additional day.
- Bicycle - 25 GEL. School and university students can enjoy a discounted rate of 20 GEL.
- Electric bicycles - 50 GEL.
- Sport-Amateur Fishing - the fee for locals (living in Ninotsminda and Akhaltsikhe municipalities) is 5 GEL, while others are charged 10 GEL. The daily fishing limit is up to 15 kg.
- Boat Ride on Kartsakhi Lake- Private boat rides cost 50 GEL, while rides on Agency's boats are priced at 70 GEL.
- Tourist Shelter near Kartsakhi Lake - 60 GEL for 1-3 people, with an additional charge of 20 GEL per additional person.
- Sapari Tour- 1 Lari 60 Tetri per km.

According to the acting head of Javakheti Protected Areas (one of the respondents), there are plans to introduce additional services to enhance the visitor experience. Three more cottages are currently being constructed near the Tetrobi Lake protected landscape. Additionally, a 24 km route is planned to be marked, and a souvenir shop will also be opened. The two cottages near Kartsakhi, which are already built, were constructed with the assistance of UNA-Georgia.



The administration of the protected areas employs 18 people, 17 of which belong to ethnic minorities. Furthermore, the protected area has facilitated the construction of three guesthouses by the private sector and a horse rental facility in Sameba, which employs eight individuals from ethnic minorities. The increase in the number of visitors to the protected areas is expected to lead to more employment opportunities in the tourism sector. The respondent mentioned cases where poachers have become interested in tourism and have stopped their illegal activities. This highlights the positive impact that the development of tourism can have on conservation efforts. However, it is worth mentioning that representatives from the private sector have expressed concerns about bureaucratic obstacles when attempting to purchase or lease land for tourism activities near the protected areas.

According to the respondent, the recent visitors to the protected areas primarily come to see lakes such as Paravani, Sagamo, Khanchali, Madatapa, and Bughdasheni. However, the most popular place to visit is Kartsakhi Lake, which is partially located in Turkey.

Birdwatching has great potential as an activity, and the growing number of youths in the municipality has been expressing interest in it. Training programs conducted on birdwatching have further boosted the interest among youngsters. The main challenges faced are the lack of visitors due to low awareness and the need for guides with specific skills to enhance the visitor experience.

These issues need to be addressed to attract more tourists and ensure the sustainable development of tourism in the protected areas. Although the region offers various opportunities and amenities for visitors, fully capitalizing on their benefits requires deeper collaboration among different actors in the value chain and extensive marketing efforts. By fostering stronger partnerships and coordination among local businesses, tour operators, accommodation providers, and activity organizers, the region can enhance the overall visitor experience and effectively promote its unique attractions.

The following subsection provides detailed statistical information about visitors to the Protected Areas.

## 6. Protected Areas

The Javakheti Protected Areas were established in 2011, encompassing several specific regions: Javakheti National Park, Kartsakhi Managed Reserve, Sulda Managed Reserve, Khanchali Managed Reserve, Bugdasheni Managed Reserve, and Madatapa Managed Reserve. These protected areas stretch across the municipalities of Akhalkalaki and Ninotsminda. As shown above, the region is characterized by its abundance of lakes, with Lake Paravani being the largest among them. Mount Great Abuli in Akhalkalaki municipality, towering at 3,300 meters above sea level, stands as the highest point in Javakheti. The upland experiences extremely cold temperatures, making it one of the coldest settlements in the area. Javakheti has a dry continental climate, and the average annual temperature remains notably low. During winter, the lakes in Javakheti freeze for extended periods.

Although Javakheti is known for its scarcity of natural forests, there are artificial pine plantations and small fragments of natural forests scattered throughout. Notably, the most significant natural alpine forest can be found near Lake Kartsakhi, along the border of Georgia and Turkey. This forest comprises of various plant species, including white birch, Caucasus Mountain ash, cotoneaster, and raspberry bushes.

In 2022, the number of visitors to protected areas reached 0.9 million in Georgia, showing a significant growth rate of 53% compared to the previous year. However, the total number of visitors has not yet fully recovered to the levels seen in 2019, with a recovery rate of 75%. Notably, the recovery rate for foreigners was 80%, while for Georgians, it was 70%. Out of the total visitors, foreigners accounted for 488,408, representing a growth rate of 57% compared to the previous year.

Among the 25 protected areas, Javakheti holds the 16th spot in terms of the number of visitors (Figure 7). While the exact figures may vary, Javakheti received approximately 1% of the total visitors, amounting to around 5,340 individuals. Notably, most of these visitors were domestic tourists, accounting for approximately 73% of the total (Figure 8). This indicates that Javakheti primarily attracts visitors from within the country.

Figure 7: Number of visitors by protected area, 2022

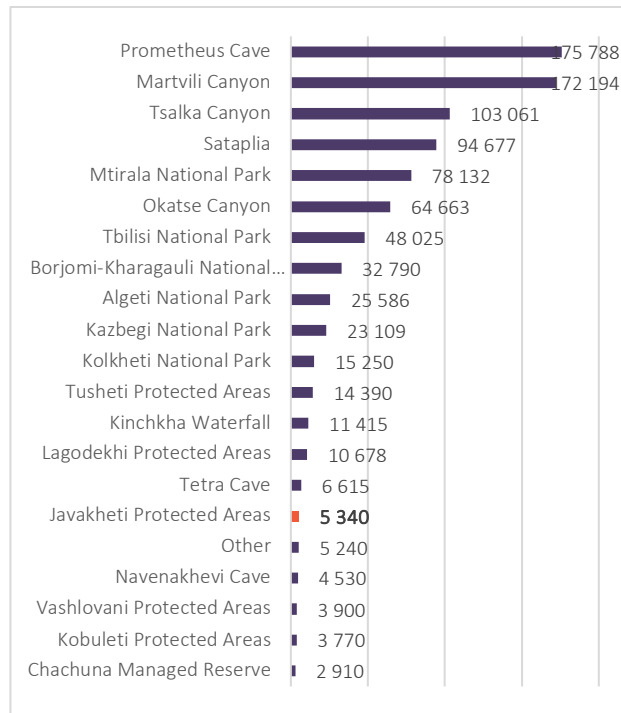
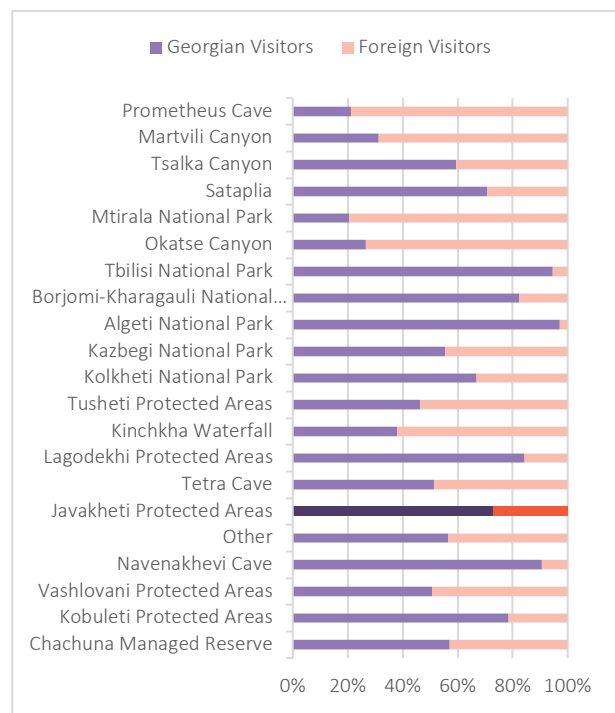


Figure 8: Share of domestic and international visitors in protected areas, 2022

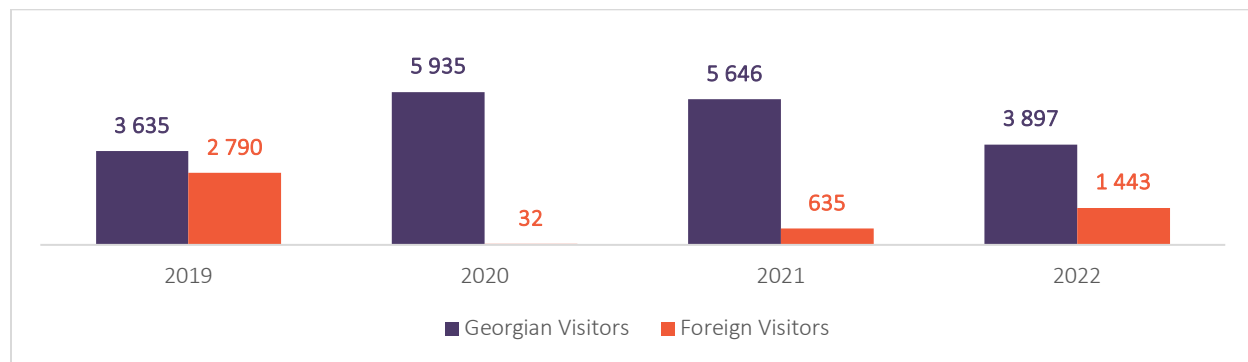


Source: Agency of Protected Areas

The impact of Covid-19 on international visitors to Javakheti protected areas has been substantial. In 2020, the number of international visitors dropped significantly from 1,790 to a mere 32. However, there was a slight recovery in 2021, with 635 international visitors recorded. In 2022, the number of international visitors more than doubled, reaching 1,443. Nevertheless, it remains 52% below the pre-pandemic level.

Interestingly, the Covid-19 pandemic had a contrasting effect on domestic travelers to the protected areas. There was a notable increase in the number of domestic travelers, rising from 3,635 in 2019 to 5,935 in 2020, indicating significant growth. However, since then, the number of domestic visitors has declined, reaching 5,646 in 2021 and further decreasing to 3,897 in 2022. Despite the decrease, the number of domestic visitors in 2022 is still higher than the pre-pandemic levels (figure 9).

Figure 9: Number of visitors in Javakheti Protected Area, 2022



Source: Agency of Protected Areas

## 7. Accommodation

### 7.1 Overview of Regional Accommodation Statistics

According to Geostat, the total number of hotels in 2021 was 1,729, providing a total of 87,797 beds. The region of Adjara had the highest number of beds, accounting for 31% of the total (26,981 beds), followed by Tbilisi with 23,478 beds (27% share) (figures 10 and 11). Samtskhe-Javakheti ranked third in terms of the number of beds, with 7,351 beds, representing 8% of the total. The majority of accommodation units in Samtskhe-Javakheti were guesthouses (48%), followed by hotels (43%) and cottages (9%). When differentiating by room types, the largest share was double rooms (64%), followed by triple rooms (25%), while luxury rooms accounted for 6% and single rooms for 5%.

Figure 10: Number of hotels by regions, 2021

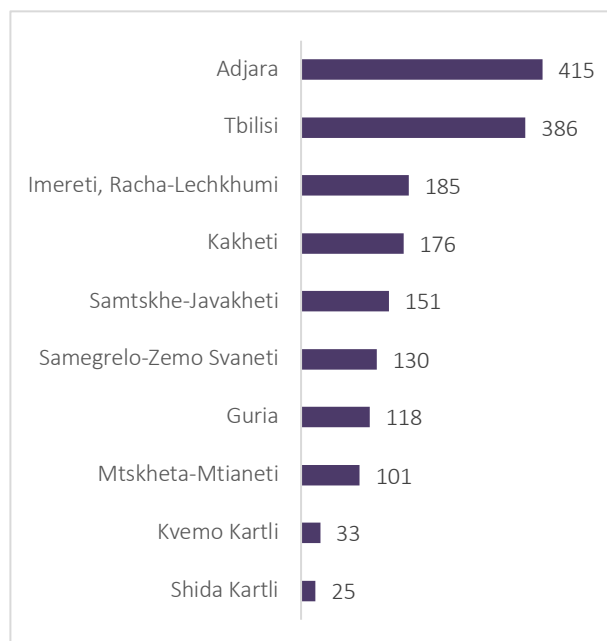
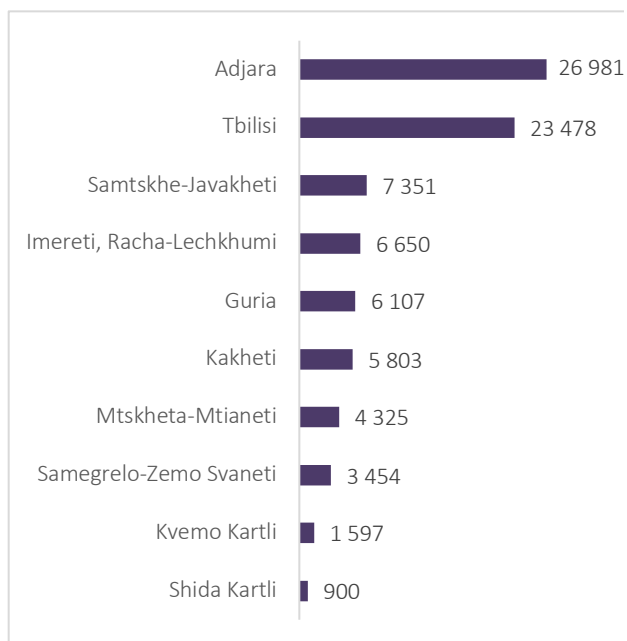


Figure 11: Bed capacity by regions, 2021



Source: Statistics Office of Georgia

In 2021, the number of guests in accommodation units across Samtskhe-Javakheti exceeded 3 million. Out of these, 1.3 million were foreigners, accounting for 44% of the total. The most visited accommodations by region were located in Tbilisi (40%), Adjara (19%), and Kakheti (16%). Samtskhe-Javakheti ranked fourth, with a 7% share (figure 12). Among foreign visitors, Tbilisi attracted the highest number with 0.7 million visitors (55%), followed by Adjara with almost 0.3 million visitors (22%), and Mtskheta-Mtianeti with 90 thousand visitors (7%). Samtskhe-Javakheti ranked fifth after Kakheti with 56 thousand foreign guests, representing a 4% share. Foreigners constituted the majority of guests in Tbilisi hotels (60%), while in Samtskhe-Javakheti, their share was only 25% (figure 13). Unfortunately, the nationality of the largest number of visitors to Samtskhe-Javakheti in 2021 is unknown (69%). Among those whose nationality could be identified, 14% were Asian, 6% were from the USA, 4% were from the EU, and 3% were from Russia.

Figure 12: Number of guests in accommodation units by regions, 2021

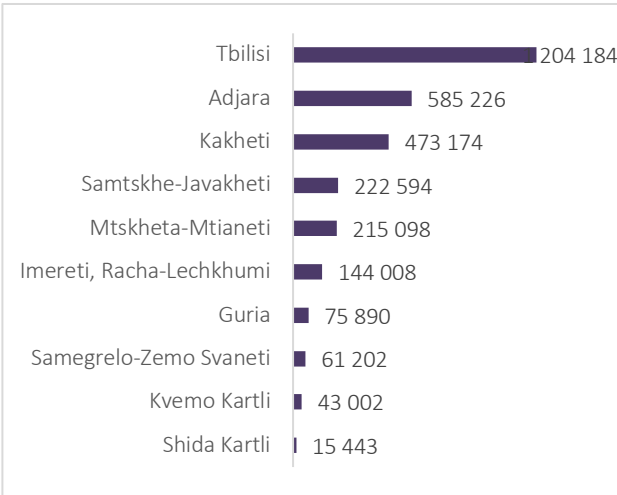
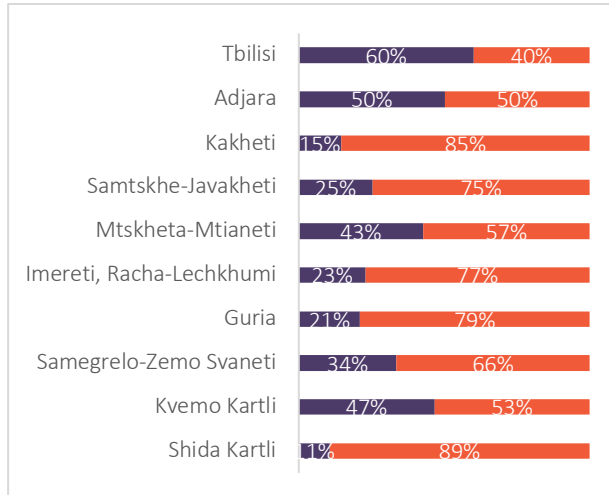


Figure 13: Share of Georgian and international guests in accommodation units by regions, 2021



Source: Statistics Office of Georgia

The number of guests in Samtskhe-Javakheti remained stable at around 243,000 during the years 2017-2019 but decreased significantly to 78,336 in 2020 due to the impact of the Covid-19 pandemic (figure 14). The income from accommodations followed a similar trend, and its 2021 statistic is expected to recover close to the 2019 levels (figure 15).

Figure 14: Number of guests in accommodation units in Samtskhe-Javakheti, 2016-2021

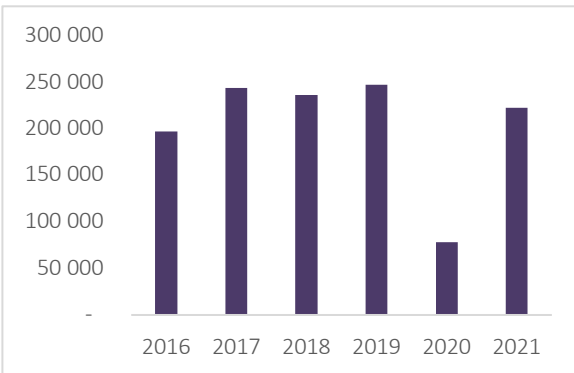
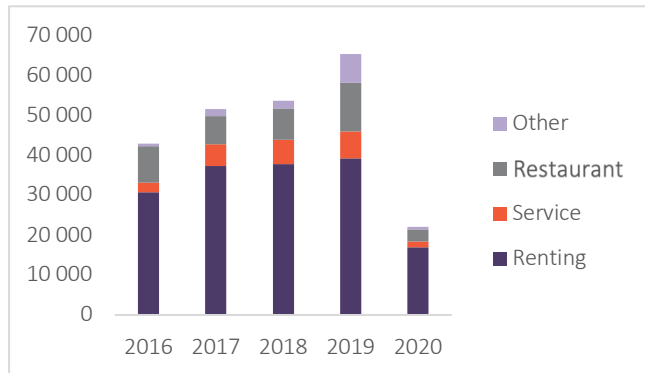


Figure 15: Income of accommodation units in Samtskhe-Javakheti (in thousands), 2016-2020



Source: Statistics Office of Georgia

In 2021, there were 1,510 people employed in accommodation units in Samtskhe-Javakheti, with females accounting for 58% of the workforce. Approximately 15,807 thousand GEL was spent on their salaries during the same year.

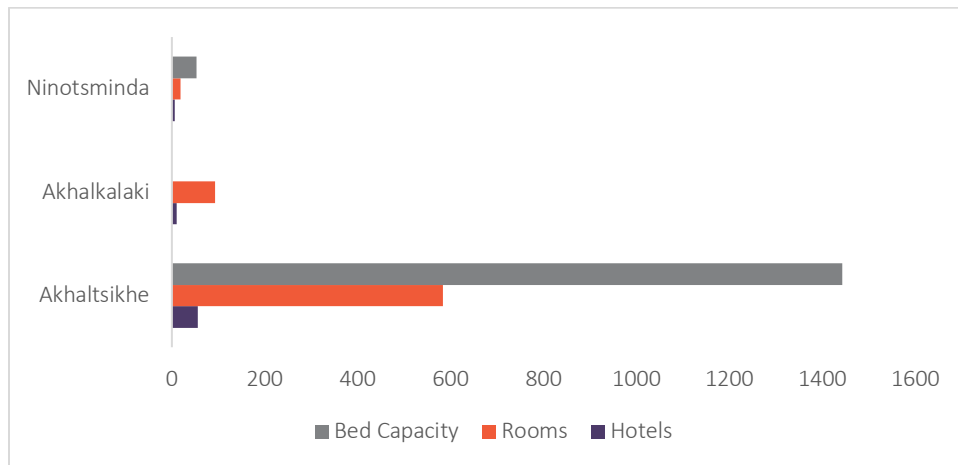
## 7.2 Accommodation Units in Target Municipalities

### 7.2.1: Facilities and Services

Accommodation providers in Akhaltsikhe, Akhalkalaki, and Ninotsminda municipalities play a crucial role in the tourism ecosystem by offering essential lodging options to adventure tourists and other visitors. These providers, including hotels, guesthouses, and homestays, contribute to the development and growth of tourism in various ways. They cater to tourists' diverse needs and preferences, providing a range of accommodation options and activities to enhance the overall visitor experience.

In the municipalities of interest, the number of hotels shows stark differences. According to DMO data, Akhaltsikhe had 56 hotels with 583 rooms and 1,443 beds, while 6 hotels, 19 rooms, and 53 bed capacity was reported for Ninotsminda Municipality. Akhalkalaki LAG reports that there are 10 hotels with 93 rooms available in the municipality (figure 16).

Figure 16: Hotels, rooms, and bed capacity by Target Municipalities



Source: DMO and Akhalkalaki LAG

The field research conducted in Akhaltsikhe, Ninotsminda, and Akhalkalaki revealed that guesthouse-type hotels offer guests a wide array of goods and services. These accommodations provide comfortable lodging, unique cultural experiences, and traditional hospitality. Through insights into local customs, crafts, and traditions, they enrich adventure, cultural, gastronomic, and agricultural tourism experiences, fostering a deeper connection between tourists and the destination.

For this Value Chain Analysis, interviews were conducted with eight guesthouse owners in the target municipalities, showcasing the variety of activities they offer. These activities range from planned events such as gastronomic tours, live music events, degustation of local wine and cheese, and cooking masterclasses to more spontaneous experiences like farming, taking the guests to shop at the local farmer's markets, organizing hiking tours, horse-riding, buggy tours, fishing trips, and motorcycle tours. Some guesthouses even produce and sell their own souvenirs.

Some of the specific challenges faced by the small guesthouses mentioned in the interviews include high commercial rates on communal taxes all year long when most guesthouses only operate commercially for several months a year, difficulties in hiring staff at competitive rates, and financial constraints to implement new ideas, such as building a furnace to develop a bread-making niche.

Another issue to be addressed is the capacity limitation within the existing accommodation units. Small guesthouses and hotels often face insufficient room availability, limiting their ability to accommodate larger

groups and meet the demands of tour operators. Expanding accommodation options and increasing capacity can help attract more tourists and enhance the overall tourism potential of the municipalities.

Overall, as the number of available accommodation units illustrates, tourists mostly opt to stay in the municipality of Akhaltsikhe and take day trips to nearby sites of interest, including those in the municipalities of Adigeni and Aspindza, along with Akhalkalaki and Ninotsminda. The latter two need to diversify, extend, and actively market their offerings to attract overnight guests.

The table below (table 2) features information about the guesthouses interviewed in the frames of this value chain analysis:

*Table 2: The interviewed guesthouses*

Hotel / Guesthouse	Municipality	Offers Food	Price for a double room	Capacity	Location
Guesthouse Edemi	Akhaltsikhe	Yes	180 GEL	17 persons	City of Akhaltsikhe
Chalet Akhaltsikhe	Akhaltsikhe	Yes	120 GEL	18 persons	Village Sadzeli
Guesthouse Olaverdi	Akhalkalaki	Yes		4 Rooms	Village Olaverdi
Riverside Inn	Akhalkalaki	Yes		4 Rooms	Village Khospio
Fish Hotel	Akhalkalaki	Yes	90 GEL	8 Rooms	City of Akhalkalaki
Guesthouse Madatapa	Ninotsminda	Yes	50 GEL	2 persons	Village Sameba
Samvel Margarini's Guesthouse	Ninotsminda	Yes		7 rooms	Village Gandzani

### 7.2.2. Workforce and Entrepreneurial Skills

The interviews conducted with various stakeholders have shed light on a significant challenge facing the tourism industry in Akhaltsikhe, Akhalkalaki, and Ninotsminda municipalities - the need for workforce and entrepreneurial skill development. Respondents expressed interest in specific, practical, short-term training opportunities, for example, in social media marketing or developing itineraries for tourists. While some interviewees have participated in training programs provided by various international partners, there is a demand for more practical training to enhance their skills and capabilities.

Addressing these skill development needs requires collaborative efforts between accommodation providers and relevant stakeholders. Partnerships with training institutions, international partners, and industry experts can help design and deliver targeted training programs that equip the workforce with the required knowledge and skills to deliver high-quality tourism services. By investing in workforce development, the tourism industry can improve its overall professionalism and enhance the visitor experience.

One of the biggest challenges reported by a respondent accommodation provider in Akhaltsikhe municipality is finding paid help during the summer. They are looking for locals who will receive food and accommodation at the hotel for free and a monthly salary of 1500 GEL. Another guesthouse owner reported seeking someone who can help them on specific occasions, with a daily rate of 30 GEL. According to her, the rate the locals demand is 50 GEL per day, which she cannot afford to pay.

Language barriers should also be addressed in this section. According to the interviews, most Armenian-speaking population in the Akhaltsikhe Municipality speaks Georgian well. The language barrier is a more pronounced challenge in the municipalities of Ninotsminda and Akhalkalaki, especially among the older generation. Most respondents have reported that if there are any barriers to the social and economic inclusion of the ethnic minorities in the area, it is primarily due to the fact that they never learned the Georgian language.

### 7.2.3 Marketing

The interviews conducted with various stakeholders have shed light on a significant challenge facing the tourism industry in Akhaltsikhe, Akhalkalaki, and Ninotsminda municipalities—the diminishing demand and waning interest among tourists. The interviews revealed that guesthouses have been passive in their efforts to stimulate visits, and overarching marketing issues persist across all municipalities. The interviewed hotels and guesthouses report that although they have placed their accommodation on Booking, Airbnb, and TripAdvisor in some cases, and most of them have social media pages on Facebook, they do not engage in promotional campaigns.

To effectively address this prevailing challenge, it is imperative for them to adopt a proactive approach to promoting their services and enticing visitors. Presently, the supply is completely demand driven. In other words, the range of activities offered by these guesthouses primarily relies on demand, where they organize experiences based on the interests and preferences of their guests. However, this approach significantly restricts the visibility of these unique experiences to potential tourists actively seeking specific activities such as buggy tours or horse-riding trips.

To expand their reach and appeal to a broader audience, accommodation providers must actively introduce special offers and packages that cater to the desires and emotions of tourists. This entails crafting experiences that resonate with individuals seeking tranquility, harmony, excitement, or adventure, thereby transcending the mere fulfillment of existing demands and attracting new visitors to the area. For example, the small guesthouses in the villages or in the outskirts of these cities could develop meditation tourism and create programs for city-dwellers to escape from the constant bustle of modern life, connect with nature, regain spiritual balance, and undergo technology detox; The hotels interviewed in Akhaltsikhe both show strong potential in developing this niche.

The interviews also suggest that the Akhalkalaki and Ninotsminda primarily serve as transit municipalities, with most travelers staying in Akhaltsikhe or other municipalities and driving to specific sites of interest. Respondents claim that the lack of awareness among tourists about available activities and attractions poses a significant challenge. However, they all point to the lack of municipal efforts and state resources and largely ignore their own role in stimulating demand.

Addressing these challenges requires collaboration between accommodation providers and other stakeholders. Building strong partnerships with tour operators, transportation companies, and activity providers is crucial to creating comprehensive adventure tourism offerings that will be able to draw in new visitors. By working together, these stakeholders can curate immersive and memorable experiences, encouraging tourists to stay in the municipalities of Ninotsminda and Akhalkalaki and to extend their stay in Akhaltsikhe.



## 8. Food and Beverage

Gastronomic tourism plays a vital role in the overall development and growth of tourism in any destination. Food establishments, such as restaurants, cafes, and local eateries, serve as cultural ambassadors, offering visitors a taste of the local cuisine and culinary traditions. These establishments provide an opportunity for tourists to explore and experience the authentic flavors, ingredients, and cooking techniques of a region, creating an immersive travel experience. Gastronomic tourism not only promotes local culinary heritage but also supports the local economy by creating employment opportunities and driving the demand for local produce and food products.

Among the municipalities of interest, Akhaltsikhe not only has a significant presence in terms of accommodation units but also dominates in terms of available food establishments. According to the DMO (Destination Management Organization), there are a total of 20 tourism-related food establishments in Akhaltsikhe. This shows a substantially diverse range of dining options available for visitors to the municipality.

In contrast, the municipality of Ninotsminda has a comparatively smaller number of identified food establishments. The DMO data only mentions two such entities in Ninotsminda: Family Corner and Restaurant Pegas. This suggests a very limited selection of dining options in this municipality. Similarly, the Akhalkalaki municipality has only one identified food establishment, Grand Mur. The information provided in this paragraph is based on the available data from the DMO. The interviews conducted during the field research show that Akhalkalaki has three hotels that offer food to their guests, increasing the number of tourism-related food establishments to at least five, and two such hotels in Ninotsminda region, increasing the number of available entities here to at least three. Thus, it should be acknowledged that other food establishments in these municipalities may not be included in the data or classified as tourism-related food venues. Cross-checking the DMO data with Google Maps confirms that their information is either incomplete or outdated. Google Maps shows 6 restaurants in the Akhalkalaki municipality and 7 in Ninotsminda Municipality,

In Akhaltsikhe, one restaurant located within the Rabati castle complex plays an active role in the tourism sector. Situated at the heart of the municipality's main tourist attraction, this restaurant attracts a significant number of visitors. Besides catering to castle tourists, the establishment also organizes wine-tasting events, benefiting from the owner's expertise as a local wine producer.

Moving on to Ninotsminda, one accommodation provider interviewed in the municipality offers a dining experience that combines delicious cuisine with the option of overnight stays. Visitors can enjoy local food and witness the cooking process in open kitchens, increasing trust and engagement. The availability of a diverse menu, including vegetarian options, appeals to a wide range of visitors, including European, American, and Georgian guests.

In addition to food, this establishment in Ninotsminda provides various additional services to enhance the visitor experience. These may include recreational activities such as table tennis, large screens for watching sports events, bicycle rentals, and fishing equipment suitable for both summer and winter fishing. The businesses have received financial support through grants, which have been more accessible in Georgia compared to other locations. This favorable environment has influenced their decision to operate in Ninotsminda. Additionally, they offer transportation services to nearby mountains and provide ski equipment during the winter season.

A significant portion of the food served at this establishment is sourced from their own agricultural production, highlighting the emphasis on locally grown ingredients. They actively use social media platforms such as Facebook, Instagram, and TripAdvisor to promote their businesses. Google Maps serves as a primary source for visitors to discover these establishments, while positive word-of-mouth recommendations also contribute to their popularity. Collaborations with popular gastronomic influencers have further boosted their exposure and attracted international visitors.

Future plans for these businesses include expanding their offerings, such as constructing conference halls to diversify their visitor base. They continue to pursue desired transportation facilities. The ability to communicate effectively in English, especially with European and American visitors, is seen as an advantage. Staffing primarily consists of family members, and the success of the establishment is attributed to a focus on marketing and service quality.

Awareness about the municipality is identified as the main challenge, emphasizing the need to promote the attractions and services available in Ninotsminda. Increasing knowledge and visibility will be crucial in attracting more visitors and fostering tourism in the area.

As reported in this section, several interviewees have expressed their interest in participating in the development of a gastronomic niche within the region. In Akhaltsikhe, some restaurants and hotels already host larger groups for gastronomic tours and engaging cooking masterclasses. Despite the existing potential of the region's wine production, it has been somewhat overshadowed by the dominance of Kakheti, which is widely renowned as the primary winemaking region in the country. Additionally, the locally produced Tenili cheese has gained significant popularity throughout the country, becoming a local culinary specialty. Furthermore, the locals in this municipality have preserved the traditional method of baking bread known as Somini, utilizing traditional furnaces. In the Ninotsminda municipality, a Doukhobor gastronome has reported a high level of interest in the local Russian cuisine. They also produce four distinct varieties of cheese and their own herbal tea, further adding to the gastronomic offerings of the region.

## 9. Tour Operators and Guides

Tour operators and tour guides are vital components of the tourism industry, playing a significant role in promoting and facilitating memorable travel experiences. These knowledgeable professionals offer guided tours, arrange exciting activities while providing basic safety guarantees, and share their expertise on the natural and cultural attractions of a region.

In the municipalities of Akhaltsikhe, Akhalkalaki, and Ninotsminda, the presence of tour guides and tour operators is currently limited, indicating a gap that needs to be addressed. These regions offer immense potential for tourism development with their diverse landscapes, historical sites, and cultural heritage. However, there is a pressing need to support and encourage the growth of tour guide services in these areas.

One niche that has gained significant interest in these municipalities is birdwatching. The diverse wildlife and unique ecosystems make the municipalities ideal destinations for birdwatching enthusiasts and ornithologists. At least two certified birdwatching guides operate in the area who possess in-depth knowledge of the local bird species, their habitats, and migration patterns. These guides provide tailored experiences to visitors, helping them spot and identify various bird species while sharing interesting insights about the region's rich biodiversity.

Akhalsikhe municipality has two licensed and registered tour operators and guides, "Abuli Tours" and "Matara," recognized for their organized and professional tourism services. However, the interviews revealed a gap in professional tour guide services in Ninotsminda and Akhalkalaki municipalities, where individuals identifying as birdwatching and adventure guides have not yet started their operations.

To support the development of adventure tourism and enhance the quality of services provided, there are currently 5 certification courses offered at the Adventure Tourism School in Gudauri (Borjomi Municipality). The courses are for hiking guides, ski and snowshoeing guides, horse-riding tour guides, bicycle tour guides, and white-water rafting guides. The school was opened in 2016, and since then, about 600 individuals have been certified from around the country. Unfortunately, municipal-level data is not available. These courses equip activity providers, including tour operators and guides, with the necessary skills and knowledge to ensure a safe and enriching experience for tourists. However, some activity providers may face challenges in obtaining licenses and certifications due to the school's location and the duration of the certification courses. Assistance in accessing and navigating the licensing process can be beneficial in helping them meet regulatory requirements and build credibility within the industry. Moreover, promoting training programs and workshops that focus on adventure tourism-specific skills, customer service, and sustainable practices can enhance the professionalism and expertise of the local tourism workforce.

In addition to birdwatching, there is also the potential to develop winter activities in the region. Snowmobile tours, snowshoeing, and skiing can attract winter sports enthusiasts, providing them with thrilling experiences against the backdrop of picturesque landscapes. Furthermore, the availability of winter activities such as ice-fishing can help extend the tourism season and diversify the range of experiences offered to visitors.

Additionally, certain hotels in these municipalities offer supplementary services like jeep tours, buggy riding, bike and cycling tours, and more in the surrounding areas and protected sites. However, it should be emphasized that these accommodation providers, despite offering activities, do not possess official registration or recognition as tour operators or guides. This indicates that they have not completed the required regulatory procedures to be officially designated as tour operators or guides.

While some tour agencies in Tbilisi collaborate with guesthouses in the region, there is a need for more tour agencies to actively promote and sell adventure tourism packages that include the municipalities in the itinerary. Strengthening partnerships between tour operators, accommodation providers, and activity providers can lead to the creation of comprehensive adventure tourism offerings. These partnerships can facilitate the seamless integration of services, allowing tourists to enjoy a well-rounded and immersive experience. In this regard, funding and organizing informational tours in the municipalities for tour operators and agencies may be an effective support mechanism. In some cases, this will help update the outdated information that tour guides may have about the lack of some road infrastructure that has been solved during recent years.

The Akhaltsikhe Castle serves as a notable example of a collaborative effort between cultural attractions and tour guides/operators. Each year, the Castle administration contracts and cooperates with 40-50 tour guides/operators and shares their event calendars with them. In return, the operators and guides organize their tours around these events. This collaboration enhances the visitor experience by providing insights into the cultural heritage of the region and facilitating access to guided tours that showcase the historical significance of the castle. On site, the guests also get to experience a taste of local culture and cuisine, depending on the nature of the specific event.

The limited availability of tour operators and guides in the municipalities highlights a promising area for local tourism development. The absence of registered and active tour operators and guides underscores the need for increased support and promotion within this sector. By fostering partnerships, facilitating skills enhancement, and assisting in obtaining certifications and licenses, the role of tour operators and guides in the adventure tourism industry can be strengthened. Their expertise, combined with the region's natural and cultural assets, contributes to creating unforgettable experiences for visitors, ultimately fostering sustainable growth in adventure tourism across Akhaltsikhe, Akhalkalaki, and Ninotsminda municipalities. Developing tour guide services in these regions presents a significant opportunity for economic growth and sustainable tourism, attracting more visitors to the area.

## 10. Souvenirs and Crafts

Souvenirs and crafts capture the essence of a destination, offering tangible keepsakes for visitors to cherish and share. In Akhaltsikhe, Akhalkalaki, and Ninotsminda municipalities, limited visitor numbers pose challenges for souvenir development. However, the Phoka St. Nino Nunnery stands out as a successful seller, featuring a diverse range of products like cheese, chocolates, liqueurs, and fish-based lunches that reflect the local heritage. Visitors fall into two categories: those heading to Vardzia complex for a break and restroom use and those directly visiting Phoka Monastery for lunch and product sampling. The nunnery's shop acts as an information hub, with visitors seeking recommendations from the nuns. Collaborations with tour operators contribute to the shop's increasing popularity. The future plans include an information center with brochures and a video showcasing attractions, capturing visitors' attention and inspiring further exploration. Some accommodation providers in Akhaltsikhe also craft their own souvenirs on a smaller scale and sell them to their guests. These hand-crafted souvenirs include felt products, dolls in national dresses, socks, embroidered Christian religious imagery, and miniature national Chokhas for wine bottles.

There are also reports of hand-crafting wooden souvenirs (wooden spoons with ornaments) in the Doukhabor village of Gorelovka. Villagers here also used to knit boots of wool.

In conclusion, despite the challenges posed by low visitor numbers, the Phoka St. Nino Nunnery and other small local producers exhibit significant potential in promoting and selling souvenirs and crafts that contribute to the region's cultural identity.

## 11. Transport

Transport infrastructure plays a vital role in the development and sustainability of tourism, as it directly impacts the accessibility and convenience of a destination for visitors. Efficient and well-maintained transportation networks not only facilitate travel within and between municipalities but also contribute to the overall visitor experience.

To reach the municipalities of interest, there are various routes available for travelers from Tbilisi and western Georgia (table 3).<sup>7</sup>

*Table 3: Available routes to access the municipalities.*

Road	Distance	Travel Time	Additional Information
Tbilisi-Partskhisi-Tsalka-Akhalkalaki	195 km	3.5 hours	
Tbilisi-Manglisi-Tsalka-Akhalkalaki	182 km	3.2 hours	
Tbilisi-Tetri Tskaro-Bediani-Tsalka-Akhalkalaki	206 km	4.5 hours	The Conditions of the Tiktamashi Pass Road (2150 m.a.s.l) should be checked when traveling by car in the wintertime.
Tbilisi-Borjomi-Akhalsikhe-Akhalkalaki	277 km	4 hours	
Tbilisi-Borjomi-Bakuriani-Akhalkalaki	273 km	5 hours	The road is closed from November to April and requires an all-wheel/4-wheel drive vehicle.
Khashuri-Borjomi-Akhalsikhe-Akhalkalaki	150 km	2 hours	
Khashuri-Borjomi-Bakuriani-Tabatskhuri-Akhalkalaki	109 km	2.5 hours	The road is closed from November to April and requires an all-wheel/4-wheel drive vehicle.

<sup>7</sup> Travel Guide Javakheti, Tbilisi 2014, Updated based on Interviews.

Batumi-Goderdzi Pass-Adigeni-Akhalsikhe-Akhalkalaki	238 km	5 hours	The road is closed from November to April and requires an all-wheel/4-wheel drive vehicle, but it is currently being repaired;
Akhalsikhe-Akhalkalaki	75 km	1 hour	

While most of the roads leading to the municipalities are paved, there are specific sections that have dirt roads, which are suitable for off-road jeep tours. These sections include Batumi-Akhalkalaki (Goderdzi Pass section), Borjomi-Akhalkalaki (Tskhartsikaro section), and Tbilisi-Akhalkalaki (Bediani-Khramesi section).

The Batumi-Goderdzi Road, traversing through Adigeni, Akhalsikhe, and Akhalkalaki, holds immense potential to bolster tourism in the region by improving accessibility. As Batumi attracts a significant number of tourists, this road can serve as a vital link, providing an easier and more convenient route for visitors to explore the municipalities of Akhalsikhe and Akhalkalaki and Ninotsminda by extension.

The distances from key border crossing points to the administrative centers of the municipalities, such as the Georgian-Armenian border at Ninotsminda (Bavra) (45km from Akhalkalaki), the Georgian-Turkish border at Kartsakhi village (50 km from Akhalkalaki), and the Georgian-Turkish border in Vale village (91km to Akhalkalaki), provide important insights into the accessibility of these areas. Efforts should be made to improve transportation options and connectivity to these border crossings, as they serve as important entry points for international visitors and play a significant role in cross-border tourism.

While minibusses from Tbilisi via Marneuli operate multiple times a day from the Okriba bus station, limited availability of seats on public transport has been reported as an issue. Additionally, the absence of public transportation within the municipalities of Akhalsikhe and Ninotsminda poses a challenge for visitors who rely on public transport to explore these areas. Respondents have highlighted the issue of poor road conditions in the villages and emphasized the need for investment in road infrastructure and public transportation connecting the villages and municipal centers. The significance of this problem is further emphasized in the Akhalkalaki Local Mobility Needs Assessment 2022, which was developed by the LAG Akhalkalaki with the support of the EU and UNDP. In contrast, the respondents in Akhalsikhe report that municipal transport runs more or less smoothly and connects the city well with its nearby villages.

The lack of private car rental companies in the region is an additional constraint for tourists who prefer the flexibility and convenience of independent travel. Private car rental services can greatly enhance the mobility and accessibility of tourists, allowing them to explore diverse attractions and cultural sites at their own pace.

In conclusion, the availability and quality of transport infrastructure are crucial factors in unlocking the tourism potential of Akhalsikhe, Akhalkalaki, and Ninotsminda municipalities. There is a need to address challenges such as the limited availability of seats on public transport, lack of public transportation within municipalities, and the absence of private car rental services. By investing in road infrastructure, enhancing public transportation services, and attracting private car rental companies, the region can significantly decrease existing barriers and enhance the accessibility of the tourist sites located in the municipalities.

## **12. Stakeholders**

### **Georgian National Tourism Administration**

The Georgian National Tourism Administration (GNTA) plays a crucial role as an external stakeholder in shaping the tourism sector. It is responsible for establishing tourism goals, identifying high-potential products and assets, and conducting international marketing campaigns to promote the country. In line with the Georgian Tourism Marketing Strategy, a solid recommendation is to emphasize nature and adventure as critical pillars for developing tourism in Georgia.

Considering recent trends in the industry, it is expected that the nature of tourism will change, with an increasing interest in less crowded destinations. This presents significant opportunities for Akhalkalaki, Akhaltsikhe, and Ninotsminda to attract more international tourists. These regions possess unique characteristics and attractions that align well with the growing demand for authentic, off-the-beaten-path experiences. By capitalizing on their natural and cultural assets, these destinations can leverage the shifting preferences of travelers and position themselves as appealing options for visitors seeking immersive and less crowded tourism experiences.

### **Destination Management Organization of Javakheti**

The Samtskhe-Javakheti Destination Management Organization (DMO) was established in 2019 to develop unique tourism products, promote the region, and enhance business quality. Despite facing resource limitations, the DMO's collaborative approach involving all six municipalities and support from key stakeholders demonstrates a strong commitment to sustainable tourism development. With increased investment and support, the DMO has the potential to position Samtskhe-Javakheti as an attractive destination, aligning with national strategies and catering to the growing interest in unique travel experiences.

### **Agency of Protected Areas**

In addition to the Samtskhe-Javakheti Destination Management Organization (DMO), another significant stakeholder in the region is the Javakheti Protected Areas Agency. This agency plays a crucial role in the conservation and management of protected areas in the Akhalkalaki and Ninotsminda municipalities.

Under the agency's umbrella, the Javakheti Visitor Centre serves as a subordinate entity, providing a range of services to enhance the overall visitor experience. The visitor center offers visitors valuable information, educational resources, guided tours, and assistance, ensuring they have access to necessary information and resources during their visit.

However, despite the efforts of the Javakheti Protected Areas agency and the services provided by the visitor center, the number of visitors to the protected areas in Javakheti remains relatively low compared to other protected areas in the country. This can be attributed primarily to a lack of awareness among domestic and international visitors.

Collaboration between the Javakheti Protected Areas agency, the Samtskhe-Javakheti DMO, and other relevant stakeholders is crucial to leverage resources, expertise, and knowledge in developing comprehensive strategies to increase visitor numbers and promote the region effectively.

### **Enterprise Georgia**

Enterprise Georgia, a legal entity of public law (LEPL) under the Ministry of Economy and Sustainable Development of Georgia, is actively involved in promoting entrepreneurial culture in the country, facilitating the establishment of new businesses, and providing grants and co-financing opportunities.

Among the various programs administered by Enterprise Georgia, the Micro and Small Business Support (MSBS) Program (a program awarding micro-grants) is particularly relevant to the target area. The locals are well informed about the program, and several of them have previously participated (some successfully) in the program. Tourism-related goods and services are one of the priority sectors of all business support programs administered by the Agency.

The Micro and Small Business Support Program is implemented in several stages. The first stage is the competition of business ideas, allowing individuals to submit their proposals for consideration. In the second stage, the shortlisted candidates receive training in how to develop a business plan. Finally, the shortlisted candidates submit detailed business plans for their proposed venture for the final selection stage.

Since 2016, the MSBS program has announced six calls for applications. The 2023 round is still ongoing, and the results are not yet public. According to the data from Enterprise Georgia, in the first five calls, a total of 5.3 million GEL was awarded to finance 546 business ideas in the municipalities of Akhaltsikhe, Akhalkalaki, and Ninotsminda. Out of these, 76 business ideas, funded by a total of 0.77 million GEL (14.4% of funds allocated to the municipalities), were tourism sector related. These sectors include accommodation units, restaurants, and cafes, services of tour guides, entertainment activities, arts and recreation, and services of foods and beverages. The figures below (figure 16 and 17) show the composition of the beneficiaries by year and by sector.

Figure 17: Beneficiaries of the Micro and Small Business Support Program in the sector of tourism, by year and municipality

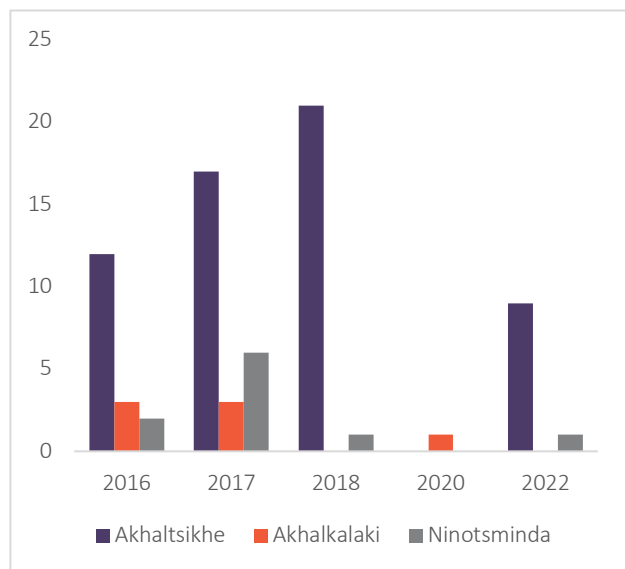
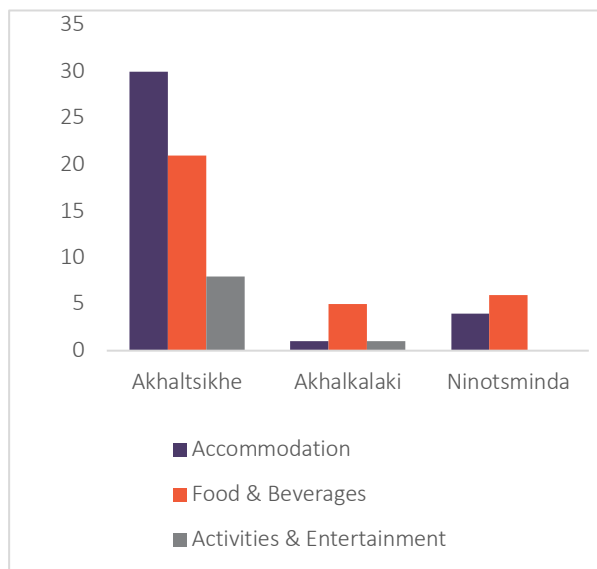


Figure 18: The Beneficiaries of the Micro and Small Business Support Program, by profile and municipality, 2016-2022



Source: Enterprise Georgia

These numbers indicate a decreasing interest in the program in all three municipalities over the years, but this effect may be attributed to the pandemic effect. The results of the 2023 call, which is currently ongoing, will provide a better picture of the dynamics.

The Business-Universal program, which provides SMEs with collateral and offers to co-finance the interest rate on their commercial bank loans, has funded 4 hotels in Akhaltsikhe with a total of 0.34 million GEL as of May 2023.



## International Partner/Donor Organizations

Tourism development in the municipalities of Akhalkalaki, Ninotsminda, and Akhaltsikhe has garnered the attention of a few international partners. One notable partnership is between USAID and People in Need (PIN), who conducted birdwatching guide training for potential guides in these municipalities. PIN, a Czech non-profit organization, has been actively engaged in Georgia, focusing on empowering people, reducing poverty, and addressing inequalities, particularly in rural areas. They work towards promoting good governance, social inclusion, and protection, as well as sustainable livelihoods and environmental practices.

In addition to the USAID and PIN collaboration, other international partners are also actively supporting tourism development in the region. Mercy Corps, for instance, has played a role in funding and implementing various initiatives. The EU program ENPARD, conducted in Akhalkalaki, has also incorporated a tourism component in collaboration with GIPA, UNDP, and FAO.

These international partners recognize the potential of tourism as a catalyst for economic growth and development in the Akhalkalaki, Ninotsminda, and Akhaltsikhe municipalities. Their support goes beyond financial assistance, as they actively promote sustainable practices and empower local communities. By focusing on good governance, social inclusion, protection, sustainable livelihoods, and environmental preservation, these organizations aim to create a positive and lasting impact on the region. Through their collaborative efforts, they contribute to the overall development of the tourism sector and help create opportunities for the local communities to thrive.

While in the cities, the information about various donor-funded initiatives and state support programs is more or less widespread, the villages, especially those inhabited by minorities (such as Orlovka and Gorelovka), report information scarcity.

## Financial Institutions

Samtskhe-Javakheti is the least represented with banking entities across the selected regions, having only 4 banks located in it. However, it must also be mentioned that all of the regional-represented banks are in the selected municipalities, with only 1 missing from Ninotsminda.

Table 7: Banking entities in Samtskhe-Javakheti and selected municipalities

Region/Municipality	Branches and Service Centers	ATMs	Number of Banks
Samtskhe-Javakheti	42	74	4
Akhalkalaki	9	12	4
Akhalsikhe	11	28	4
Ninotsminda	7	7	3

Source: National Bank of Georgia

Samtskhe-Javakheti has the lowest number of bank branches and service centers among the selected regions, with only 42 in total. However, the municipal distribution of those branches and service centers is relatively better. There are 11 branches in Akhaltsikhe, while Akhalkalaki and Ninotsminda are represented with 9 and 7, respectively.

Additionally, Samtskhe-Javakheti has a lower number of ATMs compared to the other selected regions, with a total of 74. Most of the ATMs are located in Akhaltsikhe, with 28, followed by 12 in Akhalkalaki and 7 in Ninotsminda. This distribution suggests that access to ATMs may vary across the municipalities in Samtskhe-Javakheti.

In terms of non-bank financial institutions, Samtskhe-Javakheti is significantly under-represented. There are only 3 lending entities in the region, representing 1% of the total entities in Georgia. Moreover, 9 currency exchange bureaus are located in the region, amounting to 1% of total currency exchange bureaus in Georgia. On the other hand, microfinance organizations are relatively better represented with 13 branches, accounting for 3% of total branches in Georgia.

Table 8: Number of branches of Non-Bank Financial Institutions in Samtskhe-Javakheti and their share in total branches in Georgia

Non-Bank Financial Institutions	Number of Branches	Share in Total Branches
Lending Entities	3	1%
Currency Exchange Bureaus	9	1%
Microfinance Organizations	13	3%

Source: National Bank of Georgia

To sum up, Samtskhe-Javakheti has one of the lowest representations of banking entities in Georgia, with only 4 banks located in its municipalities. The region also has one of the lowest number of branches and service centers as well. Though, the distribution of these branches is relatively better. In terms of ATMs, Samtskhe-Javakheti has a lower number compared to other regions, with 74 ATMs. Most ATMs are located in Akhaltsikhe. Non-bank financial institutions are significantly underrepresented in Samtskhe-Javakheti, with only a few lending entities and currency exchange bureaus. However, microfinance organizations have a relatively better presence in the region.

### **Vocational Education and Training**

Akhalsikhe Collage "Opizar" stands out as the sole college in the region that offers a dual course in Hotel Service within Vocational Education and Training (VET). With an average of 20-25 students, the college faces a challenge as only 80% of enrolled students manage to graduate due to irregular attendance. An illustration of this issue can be observed in the Hotel Service course, where out of two groups, only 12 students completed the qualification exams, while others displayed inattentiveness and failed to fulfill the practical requirements.

The college attracts students not only from Akhaltsikhe but also from nearby areas such as Borjomi, Aspindza, Ninotsminda, and Adigeni. Notably, approximately 30% of the students come from ethnic minority backgrounds. In order to facilitate practical training, the college has established partnerships with food establishments, restaurants, and hotels, providing valuable hands-on experience to its students.

Recognizing the demand in the tourism industry, the college has developed a program for the regional retraining of tour guides, which is set to launch soon. This initiative was driven by the high demand observed during a similar one-time course implemented previously.

### 13. SWOT Analysis

SWOT Analysis	
Strengths	Weaknesses
<ul style="list-style-type: none"> <li><input type="checkbox"/> Rich variety of bird species</li> <li><input type="checkbox"/> The abundance of lakes with diverse fish species</li> <li><input type="checkbox"/> A variety of attractions and activities</li> <li><input type="checkbox"/> Diverse local community</li> <li><input type="checkbox"/> Alpine flora and fauna</li> <li><input type="checkbox"/> Diversity of national and ethnic gastronomy</li> <li><input type="checkbox"/> National Park and nature reserves</li> <li><input type="checkbox"/> Abundance and variety of cultural objects and sights</li> <li><input type="checkbox"/> Ecologically clean products of high quality</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Low awareness among visitors about the tourism resources of the municipalities (particularly Akhalkalaki and Ninotsminda)</li> <li><input type="checkbox"/> Language barriers that hinder effective communication and engagement with local and international tourists (particularly Akhalkalaki and Ninotsminda)</li> <li><input type="checkbox"/> Lack of effective marketing efforts from both the government and private sector in promoting the destination and tourism establishments</li> <li><input type="checkbox"/> Insufficient provision of tourism-related information to visitors (particularly Akhalkalaki and Ninotsminda)</li> <li><input type="checkbox"/> Limited availability of information regarding the adventure activities offered in the area (particularly Akhalkalaki and Ninotsminda)</li> <li><input type="checkbox"/> Demand-based approach to the supply of goods and services</li> <li><input type="checkbox"/> Shortage of certified tour guides and activity providers</li> <li><input type="checkbox"/> Limited tourist stays and minimal economic benefits due to Akhalkalaki and Ninotsminda primarily functioning as transit municipalities.</li> <li><input type="checkbox"/> Limited collaboration among various actors in the tourism value chain</li> <li><input type="checkbox"/> Absence of public toilets in the area</li> <li><input type="checkbox"/> Inadequate road infrastructure</li> <li><input type="checkbox"/> Insufficient availability of municipal transport in the area (particularly Akhalkalaki and Ninotsminda)</li> <li><input type="checkbox"/> Limited availability of car rental opportunities</li> <li><input type="checkbox"/> Insufficient availability of local personnel to staff guesthouses</li> <li><input type="checkbox"/> Limited financial and human resources at the local Destination Management Organization (DMO)</li> <li><input type="checkbox"/> Seasonality caused by adverse weather conditions, particularly in Akhalkalaki and Ninotsminda</li> <li><input type="checkbox"/> Insufficient skills and experience in the field of tourism and hospitality</li> <li><input type="checkbox"/> Inadequately developed tourism infrastructure, especially in Akhalkalaki and Ninotsminda</li> <li><input type="checkbox"/> Limited cultural events and festivals especially in Akhalkalaki and Ninotsminda;</li> </ul>

	<ul style="list-style-type: none"> <li><input type="checkbox"/> Limited availability of high-quality attractions</li> <li><input type="checkbox"/> A restricted number of tourism service providers (particularly Akhalkalaki and Ninotsminda)</li> <li><input type="checkbox"/> Lack of gas infrastructure in some villages of Ninotsminda</li> <li><input type="checkbox"/> Quick profit-oriented businesses with inadequate service quality</li> <li><input type="checkbox"/> Tourist attractions marred by litter and inadequate waste management (Especially in Akhalkalaki and Ninotsminda)</li> <li><input type="checkbox"/> Bureaucratic obstacles in land leasing near protected areas hinder business startups (particularly Akhalkalaki and Ninotsminda)</li> <li><input type="checkbox"/> Limited directional signs and tourism signposting for attractions</li> <li><input type="checkbox"/> Lack of tourism infrastructure near attractions</li> <li><input type="checkbox"/> Limited public transport accessibility to villages and attractions around</li> <li><input type="checkbox"/> Non-existence of accommodation statistics in target municipalities</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Strengthening destination promotion and marketing efforts</li> <li><input type="checkbox"/> Exploring the traditional bread making in Akhaltsikhe municipality as a unique cultural and gastronomic niche</li> <li><input type="checkbox"/> Analyzing the potential of the local winemaking culture in Akhaltsikhe municipality</li> <li><input type="checkbox"/> Improving infrastructure and enhancing accessibility for tourists</li> <li><input type="checkbox"/> Rehabilitating regional roads, including Akhaltsikhe-Batumi - a valuable opportunity for enhanced connectivity and transportation infrastructure</li> <li><input type="checkbox"/> Fostering sustainable and inclusive tourism practices</li> <li><input type="checkbox"/> Investing in training and capacity building for tourism professionals</li> <li><input type="checkbox"/> Supporting entrepreneurship and facilitating business development in the tourism sector</li> <li><input type="checkbox"/> Promoting sustainable adventure tourism practices that prioritize environmental</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Global threats such as pandemics and wars</li> <li><input type="checkbox"/> High expenses for communal taxes</li> <li><input type="checkbox"/> Losing cultural authenticity</li> <li><input type="checkbox"/> Adverse impact on nature from improper tourism infrastructure</li> <li><input type="checkbox"/> The lack of interest in tourism business from the local population</li> <li><input type="checkbox"/> Language barriers remain a significant obstacle, impeding effective communication and engagement with tourists;</li> </ul>

<p>conservation, community engagement, and responsible visitor behavior.</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Diversifying adventure tourism activities to cater to a wide range of interests.</li><li><input type="checkbox"/> Developing the niche of local cuisine and promoting culinary tourism</li><li><input type="checkbox"/> Hosting more gastronomic tours and cooking masterclasses for visitors</li><li><input type="checkbox"/> Organizing regular farmers' markets during peak seasons to promote local products.</li><li><input type="checkbox"/> Developing agricultural tourism to showcase farming practices and rural experiences.</li><li><input type="checkbox"/> Exploring the potential of meditation tourism for relaxation and wellness seeker.</li><li><input type="checkbox"/> Supporting locals in obtaining necessary certifications to become activity providers.</li><li><input type="checkbox"/> Expanding the network of partners for collaboration and resource sharing.</li><li><input type="checkbox"/> Utilizing high school or university students as a summer workforce to meet tourism demands.</li><li><input type="checkbox"/> Exploring opportunities for winter tourism, such as skiing or snowboarding.</li><li><input type="checkbox"/> Optimizing online information through search engine optimization (SEO) techniques</li><li><input type="checkbox"/> Encouraging education and training in the tourism and hospitality field</li><li><input type="checkbox"/> Increasing awareness among locals about the economic potential of tourism as a source of income.</li></ul>	
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## 14. Recommendations

### 14.1 Recommendations for Public Entities

- Allocate more funding to municipalities to enhance basic amenities like road infrastructure, public restrooms, and waste management.
- Enhancing the human and financial resources of Destination Management Organization (DMOs) presents a potential avenue for bolstering their effectiveness and capacity.
- Enhance the management and promotion of national parks.
- Facilitate land leasing processes near protected areas, reducing bureaucratic obstacles and enabling responsible tourism development.
- Enhance road connectivity to neighboring tourism destinations for improved accessibility.e.g. Akhaltsikhe-Batumi.
- Enhance accessibility to attractions and promote public transport options, ensuring convenient and sustainable transportation for visitors.
- Explore opportunities to ease the burden of commercial tariffs on gas/electricity to guesthouses during non-season.
- Attract large-scale tourism infrastructure investments to elevate the municipalities' status and position them as renowned destinations, taking inspiration from the success of attractions like Dashbashi Canyon in Tsalka.
- Establish a system for collecting and maintaining accurate accommodation statistics in the target municipalities. This can be achieved through collaboration with local authorities, DMO, and relevant stakeholders to implement data collection methods and reporting mechanisms. Having reliable accommodation statistics will provide valuable insights for planning and decision-making in the tourism sector, enabling a better understanding of the market and identifying opportunities for growth and development.

### 14.2 Recommendations for International Partners

#### **Sustainable Practices, Adventure Tourism and Cultural Promotion:**

- Support the development and promotion of sustainable ecotourism and adventure tourism initiatives in the region, capitalizing on natural sites and diverse attractions.
- Assist guides and activity providers in their certification processes, particularly for specialized areas like birdwatching.
- Fund initiatives promoting sustainable practices in the tourism sector, such as waste management programs and energy-efficient infrastructure.
- Support initiatives that promote cultural events, festivals, and traditional activities to showcase the local culture and attract tourists interested in cultural experiences.
- Promote the development of a culinary niche, including traditional and minority cuisine, and organize farmers' markets during peak tourist seasons.

#### **Digital Marketing and Investment:**

- Provide financial assistance for digital marketing strategies, online platforms, and e-marketing campaigns to reach a wider audience.
- Encourage investment in tourism-related businesses by providing financial incentives and support.

- Facilitate access to financing and business development resources for entrepreneurs interested in adventure tourism ventures.

### **Capacity Building and Training:**

- Support capacity-building programs and training opportunities for local guides and activity providers to ensure high-quality services for tourists.
- Establish training programs and vocational schools focused on tourism and hospitality to enhance the skills of the local workforce.
- Provide training opportunities to accommodation and activity providers on developing touristic itineraries, marketing strategies, and basic SEO techniques.

### **Tackling Seasonality:**

- Explore ideas to increase the seasonality of the region, such as organizing an annual winter festival and ice-fishing competitions.

### **Engagement of Ethnic Minority Communities:**

- Encourage the active participation and engagement of Ethnic minority communities in tourism development projects. Support initiatives that promote their inclusion in decision-making processes, capacity building, and preserving their religious and cultural heritage. This will foster a sense of ownership, pride, and empowerment among ethnic minority groups, leading to sustainable and inclusive tourism development.
- Explore possibilities to incentivize the local Turkish, Armenian, and Russian-speaking (Doukhobor) population to learn the Georgian language.
- Create training and capacity-building programs specifically targeting ethnic minority communities to actively participate in adventure tourism activities.
- Establish community-based tourism initiatives that empower and involve local residents in tourism activities.
- Develop inclusive marketing campaigns showcasing the participation of ethnic minority communities in adventure tourism.
- Provide support and mentorship programs for ethnic minority entrepreneurs to start their own tourism businesses.
- Recognize and celebrate the contributions of ethnic minority individuals and communities to adventure tourism.

### **Collaboration and Partnerships:**

- Encourage partnerships and collaborations among tourism stakeholders, local communities, and businesses to foster a sustainable and inclusive tourism ecosystem.
- Organize information tours for tour operators and connect them with accommodation and activity providers in the municipalities.
- Support the establishment of visitor information centers and the development of informative materials, including digital ones to provide tourists with essential information about activities and attractions.

**Research and Monitoring:**

- Allocate funds for research and monitoring programs to assess the impact of tourism on the environment and local communities, guiding sustainable practices.
- Conduct feasibility studies to identify new tourism opportunities and niche markets, such as meditation tourism.