



Project funded by
EUROPEAN UNION



**PROMOTING HERITAGE - AND CULTURE - BASED EXPERIENTIAL TOURISM IN
THE BLACK SEA BASIN**

Project No BSB-1145



REGIONAL NEEDS ASSESSMENT ANALYSIS: GEORGIA



COMMON BORDERS. COMMON SOLUTIONS.



Project funded by
EUROPEAN UNION



Georgian Arts and Culture Centre

Lela Khartishvili, Researcher

Natia Trapaidze, GACC PRO-EXTOUR Project Coordinator

January 2021



Content

- Foreword 4
- Preconditions 4
 - Heritage- and Culture-based Experiential Tourism definition: 5
 - The concept: 5
- Abbreviations 6
- 1. Introduction..... 7
- 2. General overview of the country 8
- 3. Tourism in Georgia 10
 - 3.2 Domestic tourism 14
- 4. Heritage and Cultural-based experiential tourism (HCBET) in a country 18
 - Culinary and gastronomy 18
 - Social practices, rituals, and festive events 19
 - Heritage craft and visual art 21
 - Music and the performing arts 23
 - Oral traditions and expressions, including language as a vehicle of intangible cultural heritage 23
- 5. Needs for HCBET development based on the results of the survey 24
 - 5.1 Methodology 24
 - 5.2 Understanding of Heritage and Culture-based Experiential Tourism by different actors (from academia and beyond, practitioners)..... 25
 - 5.3 Customers attitudes and perceptions..... 26
 - 5.4 product and Service providers 27
 - 5.5. The most promising tours for HCET market in Georgia 28
 - 5.6 Access to the market 30
 - 5.7 Cooperation with tour operators and national professional associations..... 31
 - 5.8 Certain plans of the interviewers for the development of creative businesses..... 31
 - 5.9 Needs in the improvement of management, host professional skills 32
 - 5.10 The role of State/Government and other stakeholders in HCET development for the providers of tour products and services 33
 - 5.11 Experimental tourism challenges during a pandemic 33
- 6. Analysis and Summary of the Results 34
- Annexes 37
- References 43



Foreword

The study document - Needs Assessment Report (NAR) has been elaborated within the PRO EXTOUTR project framework, funded by the EU under the scope of the Black Sea Cross Borders Cooperation Programme. PRO EXTOUTR aims to promote experiential tourism as a sustainable development pathway for tourism business in the Black Sea Basin (BSB) by valorizing the potential of the indigenous heritage and culture, innovative solutions, and cross-border cooperation. NAR is the state-of-art applied research on experiential tourism, based on a comprehensive study on the country-specific needs for the development of heritage and culture-based tourism. NAR outlines the development opportunities for the heritage and culture-based tourism market in Georgia and will be used as the basis for the preparation of national and regional action plan in line with Georgia's National Tourism Strategy (2030), vision and field of the intervention of recently developed Ecotourism Development strategy of Georgia (2030) and association agreement between the EU and Georgia (signed in 2014). Also, NAP profiles the niche for experiential tourism and the impact of cross-border and regional cooperation to utilize the benefits of the experiential economy.

The paper presents the conception and the practice of experiential tourism to better identify the constraints and the potential, to increase the awareness of the country on the BSB regional tourism market and setting strategic goals for the heritage and culture-based experiential tourism in Georgia. Interviewed experts and business entities speak about the problems and challenges of this field. The research explored the lack of integration, diversity, interpretation and utilization of heritage and culture-based resources in tour product design, forgetting the old traditions by youth, and poor coordination among multisectoral structures for better management, promotion and visibility of HCET products on the tourism market. The main assets of heritage and culture-based experiential tourism in Georgia are traditional crafts, folk, culinary and gastronomy, and wine culture.

Preconditions

The development of this document was preceded by a preparation period during which a working group of PRO EXTOUTR project experts discussed the definition, the concept and understanding of HCET, as well as main principles and new development approaches of HCET in respective countries. The group discussed the HCET definition, main aspects and elaborated the methodology of the need's assessment study, which acted as the framework and guiding principles of this study.



Heritage- and Culture-based Experiential Tourism definition:

Heritage- and Culture-based Experiential Tourism (HCET) is a socially and environmentally responsible set of travel activities and services that offer a memorable experience and interpretation of heritage and cultures that lead travelers to self-discovery, new insights, and inspiration.

HCET promotes an understanding of history, people and culture among travelers, but also generates appreciation among the local people for their cultural values. Therefore, it contributes to the preservation of heritage and living culture, the sustainable use of resources, has regional added value, and benefits the host community.

The concept:

Heritage- and Culture-based Experiential tourism (HCET) is a concept of co-creation and co-organization of tourism activities based on one of the main principles of sustainable tourism - “respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance”.

Experiential tourism is an approach, based on establishing connection on an emotional, physical, spiritual or intellectual level between the visitors and the place they are visiting. It engages tourists in a series of memorable travel activities that are inherently personal, sensual, meaningful and transformative.



Abbreviations

AA	Association Agreement
BSB	Black Sea Basin
ENPARD	the European Neighborhood Programme for Agriculture and Rural Development
ET	Experiential Tourism
FDI	Foreign Direct Investments
GACC	Georgian Art and Culture Centre
GNTA	Georgian National Tourism Administration
HCET	Heritage and Culture-based Experiential Tourism
MEPA	Ministry of Environmental Protection and Agriculture of Georgia
NAR	Need Assessment Report
NGO	Non-government Organizations
PPP	Public, Private Partnerships
RAP	Regional Action Plan
SMEs	A small or medium-sized Entrepreneurs.
TO	Tour Operators
UNESCO	The United Nations Educational, Scientific and Cultural Organization
WTTC	The World Travel & Tourism Council



1. Introduction

Georgia with old history, rich culture resources, and heritage has a potential to meet postmodern tourists' need and expectation. The country has long traditions in tourism and hospitality and over the last decades, tourism has become one of the leading industries in Georgia in terms of generating income and compensating the country's trade deficit. It has become an integral part of a wide range of governmental organizations and their strategic documents due to its potential to revitalize and diversify rural and particularly mountainous areas, where the unemployment, lack of economic infrastructure and high migration remain major challenges.

In 2019 the country was visited by 9,4 million international visitors, among which around 5.5 million were tourists and the tourism sector has contributed with 10.4% of the Georgian GDP (WTTC, 2019). The main pillars that build the brand for Georgia and positions the country in the international travel market are (Marketing, Branding and Promotional Strategy, -): Nature & adventure, History, Cultural Heritage & Traditions, Wine and Gastronomy, The Hospitality of Georgian people. The country is rich with its cultural and historical monuments among them 4 are included in the list of UNESCO material heritage sites and 4 Georgia elements are inscribed on the Representative List by The Convention for the Safeguarding of Intangible Cultural Heritage of UNESCO (UNESCO, 2019).

The country has a great potential for development of cultural and heritage-based experiential tourism (HCET). It was first mentioned in the National Strategy for Culture of Georgia., which promotes sustainable tourism and highlights cultural resources (tangible, intangible heritage, festivals and other events) and creative industry (museums, handicrafts, cultural and natural sights, monuments, folklore, national cuisine, wine, etc.) as a potential for social-economic development, and promotion of Georgia as a unique, authentic and competitive place for new explorations and experiences (p.40).

This document presents the current understanding of the concept of ET in Georgia in context of cultural tourism and summarizes the problematics related to experiential tourism development in the country using applied research of the different stakeholders' opinion and practice in this field. It provides an overview of the tourism sector, outlines the main HCET resources, constraints and challenges, and is a basic document for the further development of the Regional Action Plan.

2. General overview of the country

Georgia is a small mountainous country of 69 700 km² in the South Caucasus region with population of 3.7 million. Located at the geographic meeting point between Europe and Asia, the country has been distinguished by the diversity of cultural traditions throughout the centuries. About 54% of the territory lies at elevations higher than 1000 m above sea level (a.m.) and 43% of the population lives in rural and mountain areas. The country is divided into eleven regions and 69 administration districts. Every single province in Georgia is distinguished by its living culture and nature, traditions, which ensures the ethnographic mosaic of the country and its special attractiveness; and such diversity creates a long list of intangible cultural monuments of all regions of Georgia. (GACC, 2012)

In terms of biodiversity conservation, forests are important habitats of Georgia and the Caucasus Region. Forests currently cover about 41% of the total area of Georgia; the majority are natural forests. The country has a more than a 100-year-old tradition for protection of nature and its richness. Nowadays, 9.6% of the country's territory is included in Georgia's protected areas system. The territory is very diverse with high mountain peaks, alpine and subalpine grasslands, old volcano plateaus, caves and chasms.

Georgia's cultural landscape is a product of the distinct history of the state, of what has been built, of what has been preserved, and farther developments. The ordinary environment in which the people live and work represents many layers of time and human activity. The national history of the country shares many national patterns such as classical period when many Georgian states have been raised, the principal of which were Colchis (location of Golden fleece sought by Jason and the Argonauts by Greek mythology) in the West and Iberia in the East.



Since the collapse of the Soviet Union and achieving independence in 1991, Georgia's transformation towards a market economy and its political orientation towards the West passed through long and difficult periods of instability due to civil wars and military conflicts in occupied areas (Abkhazia and South Ossetia), a loss of traditional markets, high unemployment rates, and workforce migration, particularly from mountain areas to cities and abroad. Mass migration from rural to urban areas occurred much later in Georgia than in most other industrialized European



Common borders. Common solutions.



Project funded by
EUROPEAN UNION



countries due to the collapse of the country's industry and the lack of employment opportunities in urban areas. Villages and the agrarian sector continued to play an important economic role in the 1990s for the greater part of the population, when the industrial sector in the country fell by two-thirds and created acute economic conditions.

GDP by sectors consists of: Industry 14.8%, trade 13.9%, real estate activities 11.4%, Construction 8.3%, agriculture 7.8%, public administration 7.5%, transportation and storage 6.3%, financial and insurance activities 6.1%, accommodation and food service activities 4.6% (National Statistics Office of Georgia, 2020). FDI by economic sectors in 2019: Transport and communication 10%, Financial sector 21%, Construction 2%, Energy sector 20%, Hotels and restaurants 9%, Manufacturing and Other sectors 29%.

Pursuant to the Association Agreement (AA) between the EU and Georgia (Parliament of Georgia, 2020) (signed in 2014), Georgia seeks to promote multifunctional development of rural areas for the economic well-being of rural communities. Based on the European experience, the diversification of the rural economy is seen as key, and intersectoral measures for the development of rural areas are considered crucial for the rural regions of Georgia. AA promotes cooperation in the field of tourism, with the aim of strengthening the development of a competitive and sustainable tourism industry (Article 9). The document also encourages the development of cross-border cooperation in other areas covered by this Agreement such as, inter alia, transport, energy, communication networks, culture, education, tourism, and health (374).



3. Tourism in Georgia

In the global tourism system, the country is a rather new actor that started to promote tourism development as an independent (non-Soviet) actor only in the late 1990s. Since that period, tourism has become one of the promising industries in Georgia in terms of generating income and compensating the country's trade deficit. Approximately 71% of Georgia's service export revenues come from tourism. In 2019, international tourism reached a record number of 9,357,964, which represents an annual growth rate of 7.8%; and total economic contribution of this sector was 10.4% of GDP. International traveler trips include trips made by international visitors (83%) and other (non-tourist) trips (17%).



Figure 1 International Travellers trips to Georgia. source: GNTA

The additional value added in the tourism industry in 2019 was mainly driven by accommodation (+10.9%), transport (air transport increased 11% and other transport increased 20.9%), food objects (an increase of 23.3%), and travel companies (an increase of 17.4%).

Today, during the COVID crisis and post-crisis periods, Georgia promotes domestic and regional tourism with main emphasis on resilient planning, and focuses on local and regional market-oriented sustainable product development. Creative industry and tourism experiences is a new alternative combination in the tourism market. It was first mentioned in the National Strategy for Culture of Georgia. The strategy promotes sustainable tourism and highlights cultural resources (tangible, intangible heritage, festivals and other events) and creative industry (museums, handicrafts, cultural and natural sights, monuments, folklore, national cuisine, wine, etc.) as a potential for social-economic development, and promotion of Georgia as a unique, authentic and competitive place for new explorations and experiences (p.40).



3.1 International Trips to Georgia in 2019 (GNTA, 2021)

International traveler trips to Georgia have been growing rapidly in recent years. In 2019, they reached a record number of 9,357,964, which represents an annual growth rate of 7.8%. International traveler trips include trips made by international visitors (83%) and other (non-tourist) trips (17%). Out of the total number of international visitor trips, 66% were tourist trips, and 34% were same-day trips. Seasonal distribution of all international trips shows that around 80% of all trips happen in May-October, with a peak in August (over million tourists). Only 6% of international trips take place in January.

The majority of international visitors (80%) were from the neighbouring countries Azerbaijan, Armenia, Turkey, and Russia. mainly for vacations at sea resorts - Adjara (Kobuleti, Ureki, Batumi) and mountain resorts (Tskaltubo, Borjomi, Sairme). Consequently, the largest share of international visitor trips to Georgia, (74.8%), was via land transport, followed by air transport (23.7%). Only a few by rail and sea were (1.5%). From the EU countries, Georgia was visited mostly by Germans, Polish, British travelers. As for age categories, the largest number of trips were conducted by the 31-50 age (48%), followed by the 15-30 age (26%) and the 51-70 age (25%).

Seasonal distribution of all international trips shows that around 80% of all trips happen in May-October, with a peak in August (over million tourists). Only 6% of international trips take place in January.

The purpose of the travel of International Visitors in 2019

International visitor trips were mostly undertaken for holiday, leisure, or recreation purposes (43.5%). Other frequently observed purposes included visiting friends or relatives (19%), transit (16.1%), business/professional trips (10.8%) shopping (6.8%), and health and medical care (1.8%). Only 1.5% of trips were for other purposes. Among conducted activities by international visitors, the most popular was Tasting Local Cuisine and Wine (75%), Sightseeing, Visiting Cultural and Historical Heritage, Museums (45%), Going to the Beach, Swimming in the Sea, Lake, River (20%), Visiting National Parks, Nature, Landscape, Exploring Remote and Exotic Places (16%) and other (National Statistics Office of Georgia, 2020). Figure below the list and share of conducted activities by international visitors throughout their stay in Georgia.

Table 1 Information Sources used by international travelers

Information Sources	Total	
	Quantity	% Share
Person of Georgian Origin	559,460	7.2%
Previous Visit	4,444,631	57.5%
Friends, Relatives	4,580,381	59.3%
Organization, Business Partner	381,530	4.9%
Television, Radio	983,933	12.7%
Travel Agency, Tour operator	260,215	3.4%
Promotional Materials	79,623	1.0%
Travel Fairs	43,552	0.6%
www.Georgia.travel	216,000	2.8%
www.facebook.com/georgiaandtravel	240,999	3.1%
www.wikitravel.com	71,608	0.9%
www.lonelyplanet.com	36,838	0.5%
Other Internet	1,183,870	15.3%
Other	16,068	0.2%

Source: National Statistical Office of Georgia

According to the tourism expenditure statistics, the largest share of international visitors' expenditures was registered on served food and drinks (27.5%) and accommodation (23.7%), followed by 21.2% shopping and cultural and entertainment services (18%). Based on the statistics on international tourism demands, 60% of tourists get information from friends, while 15% use internet pages to refer to travel agencies (3.4%). For more details, see table 2-3 in the annex 1.



Project funded by
EUROPEAN UNION

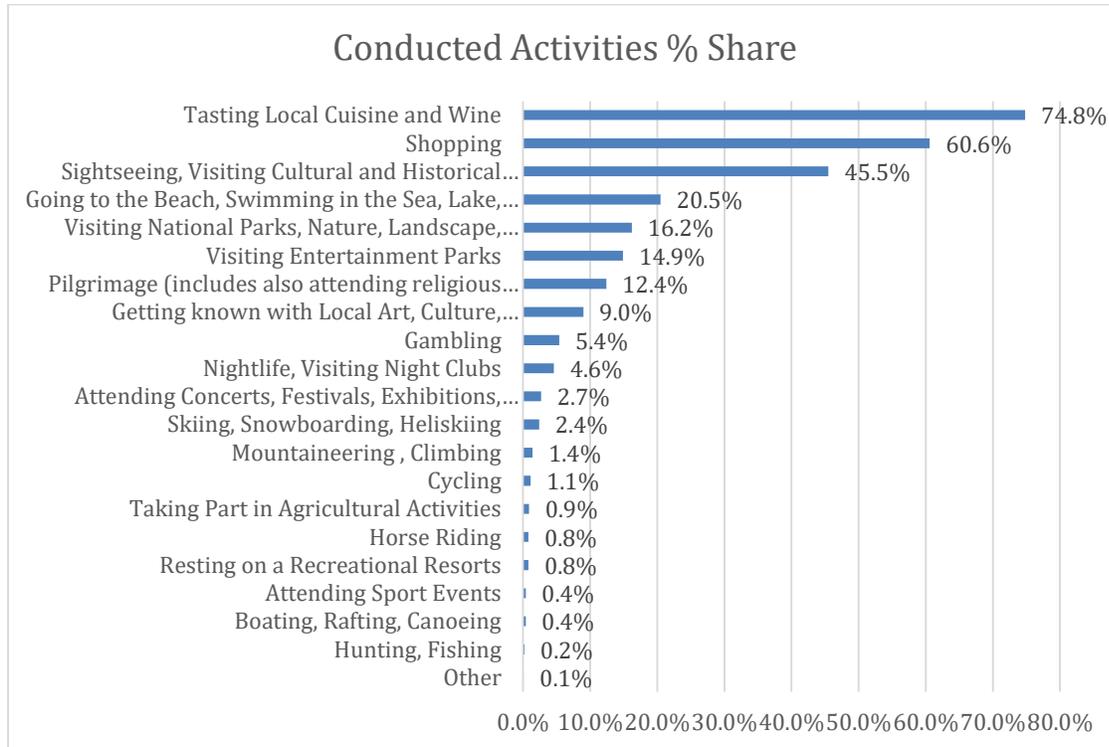


Figure 2 Tourism activities by international trvaelers. Source: GNTA

According to the statistics on tour operators and the overview of their services (GNTA, 2021), the most requested tours are Cultural Heritage Sightseeing Tours, sea tours followed by wine and gastronomic tours.

Table 2_the most requested tours by international customers in Georgia

Tours	Inbound	Domestic
Cultural Heritage Sightseeing Tours	15.6%	14.6%
Wine tours	15.6%	12.1%
Sea tours	12.4%	12.1%
Gastronomic tours	11.7%	11.3%
Nature / Ecotourism / Adventure Tours	11.7%	12.6%
Winter sports	10.4%	10.5%
Health, spa, health tours	8.6%	8.8%



MICE Tourism	7.7%	3.8%
Agro tours	3.4%	5%
Gambling tours	2.3%	4.2%
Other	0.7%	5%

NOTE: The European Travel Commission foretells that domestic and short-haul travel will be the first recovery source for European tourism. Experts also foresee changes in consumer behavior. In addition to trips closer to home or adjacent countries, there will also be bookings closer to the departure dates of the trip or preference to travel by car rather than public transport (bus, train, aircraft). The opportunity during the COVID-19 pandemic situation is to increase domestic tourism and encourage visits from neighboring countries if COVID-19 restrictions and situations allow (European Travel Commission, 2020).

3.2 Domestic tourism

In 2019, the number of domestic trips within Georgia amounted to 14.3 million. Domestic visitors participated in different activities while travelling in Georgia. Among the popular activities undertaken by visitors were: visiting friends and relatives (66.6%), shopping (55.4%) and tasting Georgian cuisine (40%), followed by luxury holidays to the Black Sea side, visiting national parks, and sightseeing, Visiting Cultural and Historical Heritage, Museums. Based on the statistics on domestic tourism demands, the most of customers (27%) get travel information from friends who already visited places.

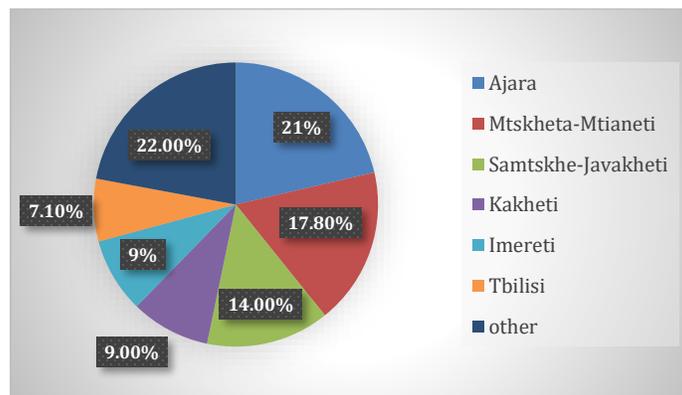


Figure 3 Distribution of Domestic Tourists by Region. Source: GNTA (2018)



Project funded by
EUROPEAN UNION



Table 2 Information Sources used by domestic travellers

Information Sources	Total	
	Quantity	% Share
Friends, Relatives	3,940,899	27.7%
Organization, Business Partner	149,344	1.0%
Previous Visit	12,971,140	91.0%
Television, Radio	116,701	0.8%
Promotional materials published by the Georgian Government	25,725	0.2%
Newspapers/ Journals	16,690	0.1%
Travel Agency, Tour operator	10,423	0.1%
Travel Fairs	0	0.0%
Internet	79,327	0.6%
Other	7,241	0.1%

Table 3 The list and share of conducted activities by domestic tourists

Conducted Activities	Total	
	Quantity	% Share
Sightseeing, Visiting Cultural and Historical Heritage, Museums	494,251	3.5%
Going to the Beach, Swimming in the Sea, Lake, River	570,679	4.0%
Skiing, Snowboarding, Heliskiing	95,234	0.7%
Visiting National Parks, Nature, Landscape, Exploring Remote and Exotic Places	508,470	3.6%
Visiting Entertainment Parks	382,824	2.7%
Taking Part in Agricultural Activities	404,820	2.8%
Attending Concerts, Festivals, Exhibitions, Going to a Cinema, Theatre, Participating in Local Holidays	96,731	0.7%
Nightlife, Visiting Night Clubs	17,097	0.1%
Hunting, Fishing	12,187	0.1%
Resting on a Recreational Resorts	124,062	0.9%



Project funded by
EUROPEAN UNION



Gambling	6,056	0.0%
Boating, Rafting, Canoeing	6,013	0.0%
Tasting Local Cuisine and Wine	5,693,849	40.0%
Attending Sport Events	35,164	0.2%
Horse Riding	13,068	0.1%
Cycling	4,952	0.0%
Mountaineering , Climbing	1,795	0.0%
Getting known with Local Art, Culture, Language, History	116,184	0.8%
Pilgrimage (includes also attending religious meetings and events, etc.)	1,194,335	8.4%
Shopping	7,893,767	55.4%
Visiting Friends, Relatives	9,496,393	66.6%
Other	83,968	0.6%

The GNTA manages the tourism sector at the national level, while at the regional and local levels there are five destination management organizations (DMOs) in Kakheti, Samtskhe, Samegrelo, Imereti and upper Svaneti and 17 Tourism Information Centers (TIC).

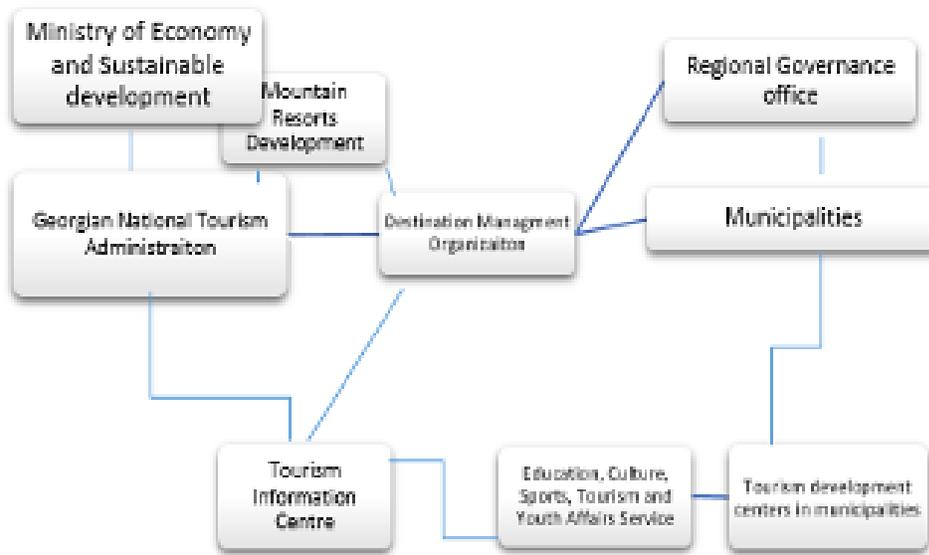


Figure SEQ Figure * ARABIC 4 a model of tourism management in the country

DMO is a new model of regional management of tourism in Georgia. It serves to facilitate multifaceted dialogues in which tourism, industry, local government representatives and community leaders plan future tourism development together to effectively manage

destinations, attract fresh investments and foster job creation. DMOs’ funding members are local municipalities (except for the new DMO entity in Upper Svaneti, Mestia) but the advisory boards consist of representatives of the GNTA, local governments, private businesses and non-governmental organizations (NGOs).

A DMO’s legal goals and objectives are:

- To develop unique tourism products and services in the regions based on the sustainable development principles
- To promote the tourism in the regions by organizing and supporting different activities with close cooperation and involvement of public and private sectors
- To support regions’ promotion both in Georgia and abroad
- To develop and implement the tourism strategy in accordance with the sustainable development principles and the National Tourism Development Strategy
- Contribute to the development process of improving the service quality of the businesses in the regions
- Ensure to increase the length of visits and visitor expenditures in the region

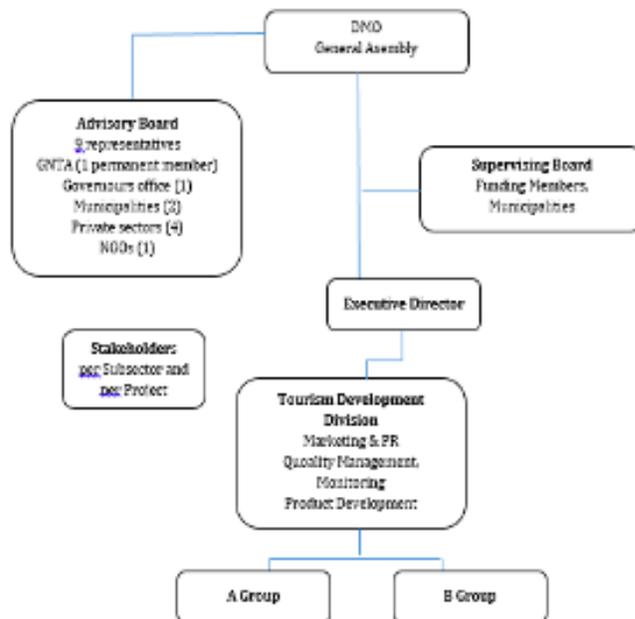


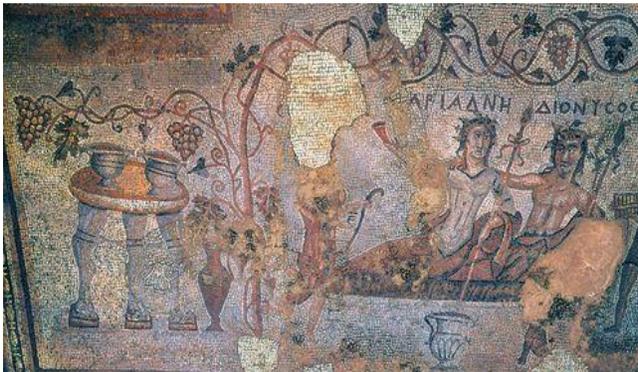
Figure SEQ Figure * ARABIC 5 DMO structure

4. Heritage and Cultural-based experiential tourism (HCBET) in a country

The uniqueness of Georgia's resources lies in their continuity. The variety of local customs is best preserved in the mountain villages, which creates their characteristic features. The list of intangible monuments of Georgia, which has existed since 2011 includes examples of living culture, such as folk dances, Georgian polyphony, culinary and gastronomy, heritage crafts and visual arts, Social practices, rituals, and festive events, oral traditions and expressions etc.

Among them, following our Georgia elements are inscribed on the Representative List by The Convention for the Safeguarding of Intangible Cultural Heritage of UNESCO (UNESCO.org, 2019):

1. The Georgian polyphonic singing, recognized by UNESCO as a Human masterpiece of and inscribed on its Representative List in 2008;
2. The Ancient Georgian traditional Qvevri wine-making method - on the list since 2013;
3. The living culture of the three writing systems of the Georgian alphabet - on the list since 2016, and
4. Chidaoba, wrestling in Georgia - on the list since 2018.



Culinary and gastronomy

Georgian cuisine has similarities with Caucasus cuisine. The country was one of the countries on the Silk Road, which resulted in travelers influencing Georgian cuisine. Every region of Georgia offers unique traditional dishes and has its own distinct style of food preparation by using spices, walnuts. For example, Khachapuri has different shapes and taste in different regions. Ajaruli



Khachapuri and Achma in Ajara, Imeruli khachapuri and korkoti in Imereti region, Guruli khachapuri in Guria, Khabizgina and pkhlovnebi in Khevi province, etc.

Georgian food and wine are essential to place the country on the Gastro-tourism market. The county is recognized as the homeland of wine. The international recognition of Georgian wine was brought by the continuous practice of applying the knowledge of the aging process of wine and fermentation in clay vessels; and as mentioned above, the traditional way of wine-making became the Intangible Cultural Heritage of UNESCO in 2013. A wide range of the variety of Georgian wheat and some other cereal crops are also a topic to discuss culinary tourism development in the country. Varieties of Autumn wheat (*Ipkli*, *Tsiteli Doli*, etc.) and spring wheat (Dika, Zanduri) as well as legumes are still preserved in the regions, especially in Kakheti, Kartli, and Samtskhe.

Social practices, rituals, and festive events

The social practice and rituals tell a lot to tourists - displaying structured (social and hierarchical) models of society, such as the Svan Machubi houses. Mountain customs, history, and traditions of family life, etc. Ethno-cultural traditions in mountain rural communities are unique. Fortress-villages in the regions are impressive due to their historical cross-icons and pathological specimens. Svan, Pshav, Khevsur houses, which are far from urban architecture style are traditionally two or three-story dry-stone structures.

Local festive events are preserved better in mountain villages. For example, in Svaneti, the *Lamaria* event coincides with the New Year's cycle and early spring holidays. One of the beautiful



events is *Lamproba*, which only exists in Svaneti. This holiday is held before spring, for good weather and yield. The main attributes of this holiday are the special wooden lamps. After the rituals, they gather around the fire and sing. Georgian wrestling is also part of this festive event.



Project funded by
EUROPEAN UNION



Other fests, which are still preserved in mountain areas are "Shatiloba", "Shuamtoba". A fest and sporting events, a horse race, take place surrounded by a background of singing, poetry and rhythms. One of the largest and most popular folk festivals in mountain regions are „Atengenoba“, which is held during the second half of July, when not only locals but also those who migrated to the lowland come back to the mountains to celebrate.

The community-based festive event tells the story of the cultural achievements accumulated by the same community over the centuries. In international practice, similar events take several days to attract more tourists. The host community offers a spectacle of rural folklore, open-air markets, folk rituals, and traditional games - performances that respond to the beliefs of the first community, highlighting the region's individualism and aspects of the social structure of the local community.



Common borders. Common solutions.



Project funded by
EUROPEAN UNION



Heritage craft and visual art

In Georgia, heritage craft is mainly referred to as the "folk handicraft", which involves the integrity of traditional crafts, though the major criterion of their identification is their "folk" basis. In their study about the heritage crafts in Georgia, GACC selects the term "heritage crafts", which in contrast to the "folk handicraft" encloses the tangible cultural heritage sites and museum collections, their shapes, and ornamental patterns; this does not limit the scope of this sector and its "folk" origin. It should also be noted that the term "crafts" mainly involves traditional technologies, which are transferred from generation to generation, though the crafts are upgrading along with the technological progress that implies the technological innovations and causes the changes in the process.

Term	Description by GACC
Heritage crafts	The heritage crafts is a creative process or a process of creation of an imitative product by which the products are created by hand or partially by mechanical means, which is based on the motives of both tangible and intangible cultural heritage and folk traditions.
Heritage handicraft products	Traditional handicrafts products include the products performed with the traditional techniques and/or which implies traditional forms, ornamental patterns and in the creation of which an important role is played by the manual labor.

Table 1. Heritage crafts technological groups and subgroups spread throughout Georgia

1. The textile arts	5. Woodwork
1.1. Knitting, crochet work, etc.	5.1. Woodwork
1.2. Weaving (carpet, rug, tapestry)	6. Leatherwork
1.3. Felting	6.1. Leatherwork
1.4. Print fabric	7. Paperwork
1.5. Embroidery	7.1. Paperwork
1.6. Sewing	8. Metalwork
2. Pottery	8.1. Stamping
2.1. By throwing	8.2. Casting
2.2. By injection molding	8.3. Jewelry
2.3. By pressing	9. Stone/bone work
3. Glass	9.1. Carving
3.1. Glass	9.2. Painting
4. Enamel	9.3. Glyptic
4.1. Champlevé	10. Mixed
4.2. Cloisonné	11. Other
4.3. Painted enamel	



Project funded by EUROPEAN UNION



Table 2. Heritage crafts functional groups and subgroups spread throughout Georgia

Furniture	Ornaments
Religious items	Garments
Habiliment	Souvenirs
Decorative compositions	Tableware
Dolls/toys	Carpet/rag
Weapon	Other
Interior accessories	
Basket/crib	
Musical instruments	

The final product of the heritage crafts is material and this is the most "tangible" among the intangible cultural heritage. However, as far as the crafts and handicrafts are connected with the knowledge and skills, which are transmitted by the oral tradition, the UNESCO Convention refers just to the intangible skills and knowledge, and not to any particular sample. Accordingly, the objective of the Convention is not to protect a particular sample, but to preserve the tradition and to safeguard its transmission from generation to generation.



Agriturismo farms in Upper Adjara and Imereti. Photos by Ecotourism Association

Common borders. Common solutions.



Project funded by
EUROPEAN UNION



Music and the performing arts

Georgian folk games e.g., *Isindi*, *Tskhenburti*, *Kabakhi*, *Lakhtoba*, *Askinkila*, etc. are mostly forgotten, and fragments can only be found in single cases. In terms of tourism products, such performances are entertaining and cognitive. For example, *Berikaoba* (a monument of intangible cultural heritage) - the Georgian traditional masked theatre contains exciting scenes, novelty, which is a fusion with old traditions. *Leloburti* (included in the list of intangible cultural monuments since 2019), which is often called the predecessor sport of rugby is also interesting. It was spread all over Georgia; however, today only remains in Guria. "Lelo" is an ancient Georgian word and means to move by force.

In the Georgian language, polyphonic singing is a secular tradition in a country whose language and culture have often been oppressed by invaders. There are three types of polyphony in Georgia: complex polyphony, which is common in Svaneti; polyphonic dialogue over a bass background, prevalent in the Kakheti region in Eastern Georgia; and contrasted polyphony with three partially improvised sung parts, characteristic of western Georgia. Some of these songs are linked to the grapevine cult and many dates back to the eighth century.

Oral traditions and expressions, including language as a vehicle of intangible cultural heritage

The regions of Georgia are famous for their folk poetry and rituals. Examples of oral lore - lyrics, prayers, legends, myths, sagas, fairy tales, etc. - are remarkable in this regard. People, especially in highlands are good at expressing their sorrows and spiritual emotions in verse. Pshav poetry and Pshav *kapia* (versification) hold a special place in Georgia's local folk oral storytelling traditions. *Kapia*, a popular tradition in Pshavi, is a form of impromptu-conversational versification between two rival individuals or groups. *Kapia* was practised during festivals, weddings, while herding cattle, and when travelling. "Vazhaoba", an annual festival in Chargali to honour the known Georgian writer Vazha Pshavela, is one example. The festival program includes flesh-backs of his life and career, poetry reading and gala concert.

5. Needs for HCBET development based on the results of the survey

5.1 Methodology

The finding of the NAR is based on a desk research and empirical research. Secondary data are obtained from policy documents, tourism projects, and scientific research articles. Empirical research encompassed the combination of both quantitative and qualitative research methods. In particular, questionnaires on visitors' attitudes and perspectives, thematic semi-structural (in-depth) interviews with various stakeholders.

To determine tourist demand, a quantitative survey was conducted. Among 100 respondent there were:

- representatives of national and regional tourism organizations (5)
- non-governmental organizations (5)
- tour operators and rural tourism entrepreneurs (29)
- national and international tourism consultants (3) and
- visitors respondents (59).

The list and details of interviewed stakeholders is in the Annex 1.

Figures below describes the Visitor Respondents' - age categories, and regions of origins.

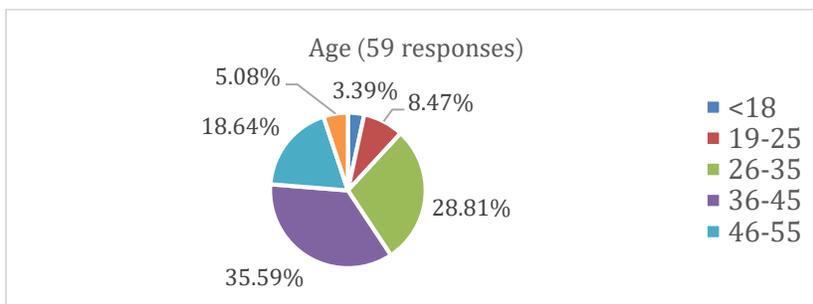


Figure 6 The visitor respondent grouped by age

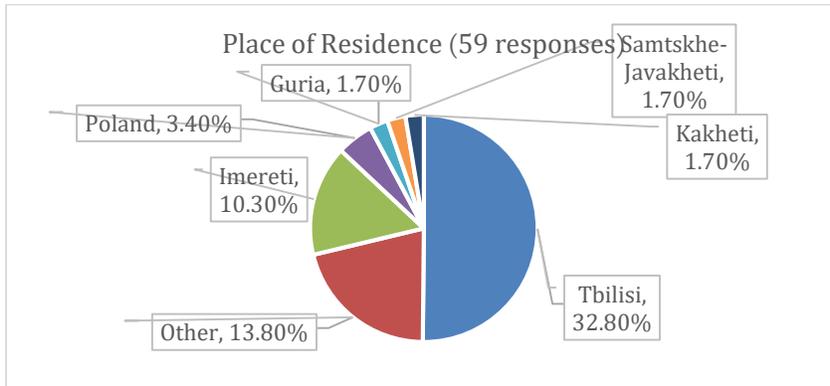


Figure 7 visitor respondents grouped by their places of origin

5.2 Understanding of Heritage and Culture-based Experiential Tourism by different actors (from academia and beyond, practitioners)

Local knowledge and living culture are the main assets of HCET in Georgia; and it mostly is discussed in wider context. Practitioners perceive HCET as an alternative form demanded by post-modern tourists who look for new emotions and knowledge. They generally use the term interchangeably with cultural, gastro, rural tourism, where the main actors are community members/residents with unique culture and traditional ways of (local) production. Respondents from academia described experiential tourism interchangeably with “participatory tourism” where guests and hosts are engaged in co-creation and co-production of new experiences (Khartishvili, 2020). They emphasized that the product development is customer- and local community based oriented, by focusing on the visitor’s value and needs and it is characterized by the active and interactive connection to the local community. Respondents mentioned that adventure experiences is also main element of ET and HCET can not be limited. This was also indicated in customers’ quantitative research questionnaire, where they mentioned that adventure and new places are also their prime interest.

Entrepreneurs describes HCET such activity as a means to be in harmony with nature, to create a space for joy and cognition, transmit cultural traditions, and share them with others (Megrelidze, host at Komli in Guria). The owners of Art Residence call HCET a type of tourism activity that provides the intersection of Georgian and foreign artists in contemporary art in Georgia. Berdzenishvili in Skiji House (Guria) describes HCET as a context-dependent tourism activity/ offer: “for the local farmers this is a rural eco and agro tourist offer which enables guests to get familiar with the traditional environment, engage in everyday farm/rural activities, etc”. Hosts at Ethno Village in Samegrelo have hotel Mokvare in Upper Ajara perceive HCET as an activity sharing unique culture with the whole world.



5.3 Customers attitudes and perceptions

A quantitative survey revealed that respondents mostly take a trip throughout Georgia to Explore living culture of the place (85%), discover new areas (84%), followed by study/ self-actualization (51%) and entertainment (41%).

Tourists plan their trip online mostly using Booking.com, TripAdvisor; they also rely on recommendations from friends and relatives and social media (Facebook, Twitter.). Most of the respondents plan every aspect of their trip/holiday prior; they look for adventures and would like to do and experience something new every time they travel. They love to meet local people and share some aspects of their everyday life. 80% of respondents noted that, when they travel, they like to taste new food, which is typical for the region. Participation in various invigorating/stimulating activities is a bit rare for travellers. They still follow traditional type of holiday visits, Their particular interest is visiting heritage and cultural sites and interested in fod & wine tasting. 50% of travellers noted that technologies and innovations (such as digital tours) bring additional value to visitors' experience but still do not represent the prime issue. They seem to be ready to pay to get a meaningful and enriching touristic experiences. Despite various and immense interest in experiences and adventure, more than 30% of respondents are against trips without comfort, and they are not ready to sacrifice their comfort or convenience to acquire memorable and enriching experiences.

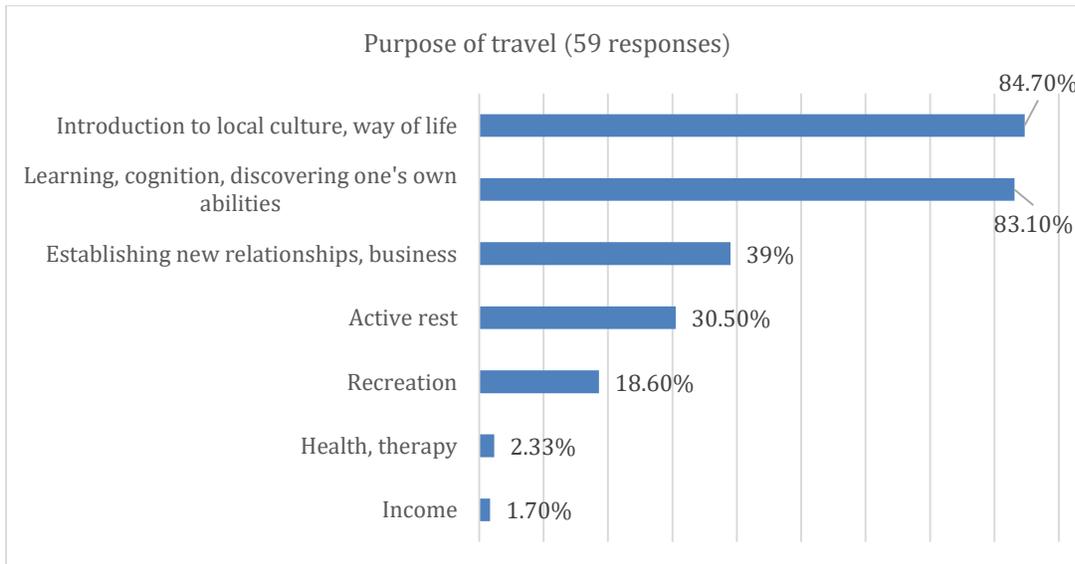


Figure 8 The purpose pf the travel

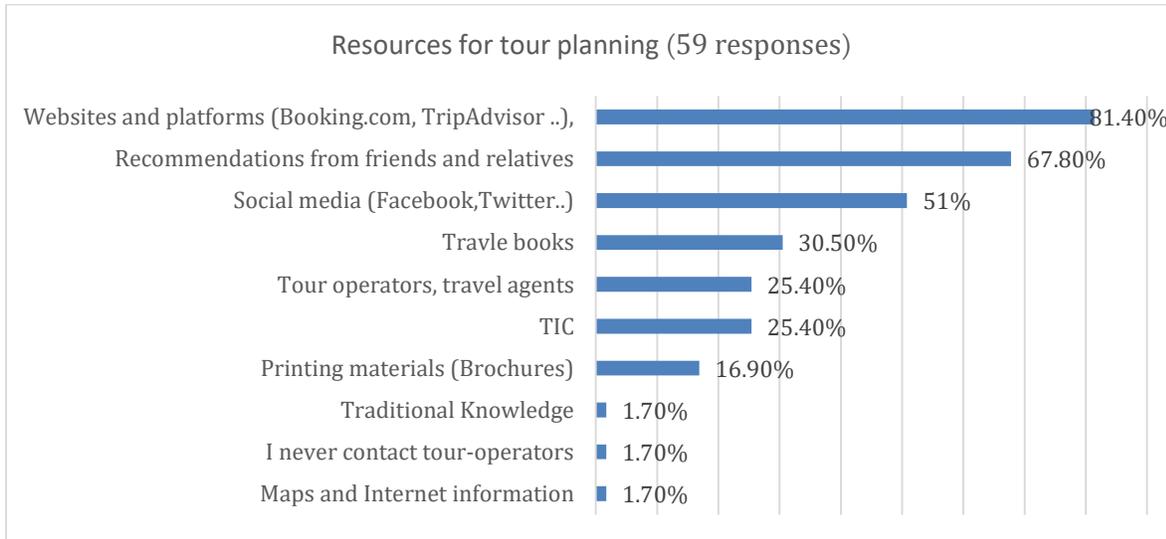


Figure 9 Resources for tour planning

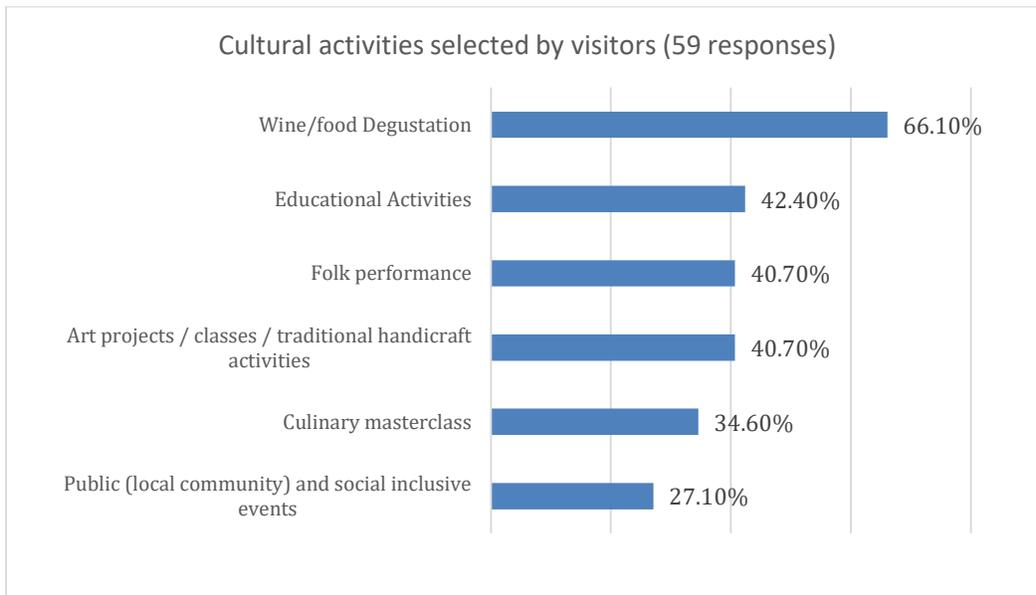


Figure 10 Cultural activities selected by visitors

5.4 product and Service providers

Qualitative research identified that many product suppliers are neo-rural residents, who moved to villages, back to their ancestors' houses, and started tourism and farm businesses. They revitalized the place by creating an authentic environment. Some of them bought traditional



houses, collected old items, investigated old recipes, stories and legends about places. They designed tour packages based on local customs and traditions by integrating Georgian dance and song classes, culinary masterclasses, poetry evenings, etc. For example, families in Adjara (guesthouse "Mokvare"), which are popular with Ajarian folklore, are visited from all over the world to learn Georgian dance and songs. "Arti Residence" in 40 km from Tbilisi, is popular in traditional pottery-making. The studio also offers workshops on graphic design, making Murano glass, Georgian cloisonné enamel, jewellery, offshore technology and printing. Musical evenings, live Georgian music, as well as tasting of family made wine are also organized upon guests request. The hosts revitalized the abandoned place and gave new life to the destination. The tourism product offered by Melita Dance Studio is another example of an experiential tour product with the main focus on participation quality. Melita created a tour within the dance studio, where she offered a dance class to tourists visiting Georgia. The tour price is 60 euro, which includes transportation service, wine tasting, light lunch, dance class, and a photographer's services. In case of good weather Melita organizes an excursion outside the studio, in nature.

5.5. The most promising tours for HCET market in Georgia

Culinary, combined with elements of Georgian hospitality, is the most promising for the Georgian tourism market. For Gastro-tourism - a niche that involves authentic, memorable culinary experiences while travelling regionally or locally - food is the motivation for travel. The locations merely function as vehicles for gastronomic experiences (food-related-activities that involve behind-the-scenes observations, cultural/regional illuminations and often hands-on participation, culminating in partaking food or drink). Another popular element of Gastro-tourism is Georgian wine. The international recognition of Georgia as the homeland of wine was brought by the continuous practice of applying the knowledge of the ageing process of wine and fermentation in clay vessels.

The main characteristic of heritage and culture-based creative programs is community-based activities. For example, in Imereti, agritourism entity "Korena" has an agreement with a choir of the Gelati monastery and arrange special evenings for guests. They created the folk ensemble "Trio Okriba", purchased new forms and prepared a special program for "Korena" agritourism visitors. They also recorded a disc and now sell on the spot. Local entity "Khevsureti and community" in Korsha village works with youth (local craftsmen, ethnographers, women working on felt). Their offers focus on community-based activities and characteristics of local customs and living culture. The family in Guria revived forgotten traditions of tea production by reviving tea culture by generating local knowledge and community practice. Agritourism farms, which offer culinary classes and gastro tours to their visitors, collected old recipes of traditional dishes, customs of using medical herbs, etc. from their neighbors who are also involved in organising

Common borders. Common solutions.



special events for tourists. Owners of "Oda House" in Samegrelo cooperate with community members who can provide accommodation service to their customers.

Providers, who selected tourism businesses as an alternative source of income put efforts to rearrange their area, farms and houses for receiving tourist customers; they integrate hospitality elements into their living space that would enable guests to participate in the product making process. For example, "Borjgalo" in Ajara, located 3 km from Batumi, presents Georgia's history in the family museums, samples of various fields of agriculture, models of old village houses, decorative panels and wood carving, 11-meter waterfall. The host makes all these items and displays them under the open-air.

Souvenirs from local businesses and local crafts can be found in regional centres. If managed well, direct sale facilities both for handicraft and agro products have a potential in the country. The current selection of souvenirs needs to be improved. Based on our survey, the products produced by the respondents are: crafts made of felt, cotton, children's decorative objects and toys; enamel, ceramics and stained glass; wooden tables, wine bars, panels, wooden souvenirs; carpets, wallets, carpets; a variety of decorations: crosses, souvenirs, medallions; and gold and silver products (mainly jewellery).

The so-called "farm to table" concept is becoming more and more popular, which means eating at the guesthouse or hotel with products grown on their farm. The development of the product life cycle envisages man and nature harmony and represents the activity of involvement of tourists in agritourism farms - picking vegetables, seasonal fruits, tasting, cooking, etc. This increases both the engagement of guests in the process as well as the length of their stay on the farm. Hosts in "Lagazi" (village of Alvani, Kakheti) show visitors a whole bread baking process. Their tours begin with a wheat field tour, an old mill, followed by a demonstration of wheat pressing and bread baking processes. They try to make all the processes tangible for guests. The same concept works for wine, cheesemakers. For example, owners of agritourism farms (Oda in Samegrelo, Ruirpiri biodynamic farm in Kakheti, etc.) show their guests vineyards, tell stories about their traditions, viticulture, biodynamic farming (if any), traditions of wine-making and storage, demonstrate special equipment for cleaning Qvevris etc.

Owners of "Komli" in Guria begin their excursions with exploring tea bushes (a small plantation) near their guest house, collecting tea leaves, pressing, drying, which ends with tea making and tasting. Interpretation is the central aspect of heritage and culture-based creative tours. The same hosts of "Komli" in Guria packed the history of their ancestors. In particular, stories about the Soviet Union of Georgia and their family members' participation in the Second World War. All this reflects the political-historical events of the country. Guests view photos, read letters related to the family story. The guests are interested in hearing stories about collective farms (Kolkhoz) from the Soviet era and the country and nation's history. Despite the variety of activities, service providers noted that visitors look for recreational activities such as short walking around their facilities, swimming, mushroom picking, etc. For example, owners of



"Sisatura" in Samegrelo advise places for fishing to their guests, while in Ajara and Guria, hosts arrange excursions to the nearest waterfalls, sea-side area and advice viewpoints to their visitors. Daka's family in Guria arranged a recreational area beyond their territory where guests were able to enjoy the sun-set and communicate with locals. Respondents from the Kakheti region plan to develop trips to mad volcanoes and national parks around the Kakheti area which would add value to their product.

5.6 Access to the market

Hospitality service providers typically use internet platforms, such as Booking.com; Airbnb.com; TripAdvisor (rare case); place.ge. google.com. Some guesthouse owners created their own web sites. Respondents noted that they receive most of the guests from former visitors. They frequently use Instagram, Facebook, especially local tourists. Groups of tour operators were also quite a large segment (mostly for gastro, Agri farms) before COVID 19. Some of businesses are members of national tourism, rural tourism and farmers' associations. But there is no coordination, network of creative tourism entrepreneurs at a regional level. The capacity of establishing a tourism network at regional level does not exist except Dedoplistskaro. They are also introduced to the market through travel companies and other info tourist websites.

There are two online platforms in Georgia where service providers/hosts offer different experiences online: **Expago.ge** and **20.ge**. Both platforms are in their initial stage of development, trying to compete with Airbnb.com. Among offered services are sightseeing tourist organised by host families, participation in different activities with hosts and local community members. Tourists' feedbacks are positive, they describe hosts as good storytellers, friendly atmosphere in the county, and emphasized the uniqueness of Georgian hospitality. "Hospitality is our second name" was the slogan on the airport present, given to foreign travelers (Datishvili 2020).

Recently developed website Georgia Starts Here **www.georgiastartshere.com** is also presentable web-promoting unique sites and stories for getting experiences around the country. The unique experiences of Georgian family traditions are also added to Airbnb.com portal on transformative travel experiences. However, Georgian actors' capacity (similar to other regional actors) does not meet the quality and quantity of experience they promise. As scholars noted (Paulauskaite et al.) authentic experiences via Airbnb related to three themes - the lodging, the host interaction, and the local culture. Interacting with the host and surrounding community, travelling like a local, and engaging in cultural learning is the essential aspects which should be fulfilled via Airbnb offers to global audiences in the new international tourism climate.



5.7 Cooperation with tour operators and national professional associations

Majority of rural accommodation owners receive guests through personal contacts. Only 12-14% of their tourists come from travel agencies and tour operators (source). Individual travellers, which are the majority of visitors to Georgia contact hosts directly through website contacts. Thus, tour operators are not the major source of bringing tourists to rural regions. For example, in the Kazbegi region, around 25% of international tourists use tour guides / services from ground agencies, visitor information centres and less than 10% of visitors arrange accommodation service through tour operators. Rural, eco and agritourism tour offers are parts of tour operators' packages. On the international tourism market, trips to Georgia and the Caucasus countries are promoted through international tour operators. In some cases, they cooperate directly with local guides, drivers to arrange trips to certain destination areas.

Based on tour operators' survey, the following problems were identified:

- interpretation of local products
- lack of rental services on site (bicycles, horses, tents) and low quality
- inadequate quality of services in accommodation facilities (including inadequate service, hygiene and comfort)
- lack of diverse tourism products, lack of additional services (such as organized tours) such as new routes and new tourist destinations, including water-related activities
- menu offered both in guesthouses and catering facilities
- lack of local food and product
- lack of on-site entertainment elements, including festivals and other events
- lack of local crafts
- trail condition and landmarks
- weak presentation of DMOs
- language barrier
- lack of special offers for children

5.8 Certain plans of the interviewees for the development of creative businesses

As wine tours are popular segment on Georgian tourism market, most of service providers plan to arrange marani cellars and add wine tasting and interpretation services to their offers. They also think to develop additional facilities in and around their living place, which enable tourists to stay for a long period. For example, owners of "Komli" plan to build wooden constructions such as cottages, a barrel-shaped cottage in the shape of a glamorous camp, treehouses, etc.

Common borders. Common solutions.



while others intend to integrate local talents and historical buildings into their offers, such as house-museums of famous Georgian writers (Dumbadze Museum in Khidistavi, Kalandadze, etc.).

In Ajara and Samegrelo, families look to revive traditional cloths, special recipes of Georgian, forgotten dishes, especially seasonal dishes, old Georgia musical instruments, which are used rarely, etc. "Khevsureti and Temi" wants to enhance community-based activities by involving locals in organizing camps and cafes, which works both for locals and visitors. They want to develop extra space for services (open-air kitchen facilities, fireplace, presentation or workshop areas, camping areas etc.) to make their destination more memorable and experiential, and will allow them to accommodate larger groups of tourists. They look to install alternative energy resources (e.g., solar systems) look for funds for it. Hosts noted that they are spontaneously developing tourist offers and need a thematic approach - various travel packages that could be popularised online. In particular, investigation and interpretation of cultural tour routes around their territory.

5.9 Needs in the improvement of management, host professional skills

Service providers as well as representatives from DMOs and local travel information centers attended (certified) training courses in hospitality tourism & service standards provided by the national NGOs and donor organizations such USAID Economic Security Programs, GIZ Private Sector Development and Technical Vocational Education and Training Program, Elkana, Georgian Ecotourism Association and others, and this process is still ongoing. They noted that creative and experiential tourism products are a new topic in the field. They need to organize courses for their staff on gastronomic and culinary issues and food delivery topics. In general, there is a shortage of professional staff in the culinary and gastro tourism market e.g cook, waiter.

The key to success is hospitality and creative skills, and hosts turn such experiences into a business. In terms of agritourism, culinary skills and organic farming knowledge are necessary for this tourism business. They require the necessary competencies for digital branding and marketing, communication skills, learning / improving a foreign language (English, Russian), cultural tourism management basics, improving social media management competencies, business planning, accounting, legislation, and (digital) marketing, and fundraising. Financial planning, documentation and service price calculation is still a challenge for service providers. Hosts accept market prices without a clear understanding of the real cost and income, which arises from the need for technical assistance.

Their service prices are not high but do not meet the service level. For example, accommodation owners accept market prices without a clear understanding of the real cost of their services, business profit from tourism, and income.



Project funded by
EUROPEAN UNION



5.10 The role of State/Government and other stakeholders in HCET development for the providers of tour products and services

Respondents noted that the general infrastructure is a big issue for the development of the tourism industry, in particular the supply of water and gas in the regions, as well as tourism facilities, road signs, access to regions. Another challenge is the public spaces for communication with locals' residents - arranging recreational areas on the banks of rivers, holding local fairs, farmers' markets, maintenance of the traditions of folk games and local fests that still remain in some regions, and will be forgotten without local municipality support. They also pointed to the needs for information support, small grants and awareness raising programs, promotion and marketing, e.g., image videos, guidebooks that enable them to participate in the grant competition. One of the main obstacles mentioned by service providers was the country's high tax policy. Providers with a turnover of more than 200,000 lari (50,000 euros) pay 20% of Income tax per year.

Respondents spoke about the role of territorial management organizations in the regions in terms of an integrated tourism product and promotion. There are needs for community mobilization and joint product development. For example, the famous Erkomaishvili studio in Guria is ready to develop summer performances for community guests if uniforms for singers are prepared (like Okriba folk group made it). Singers usually are dressed in Chokha-Akhalukhi, which is not relevant in the summer heat. Visitors often need a local guide, communication with the locals and a better interpretation of the sights. Among 25 service providers 10 works with local destination management organisations DMOs, Tourism administration and local action groups LAG. 20 of them are members of professional associations such as the Biological association Elkana, Georgian Farmers Association, Ecotourism associations, and three of them cooperate with Caucasus Environmental NGO Networks (CENN). Providers such as Sisatura, Casa de Khasia, Megsruli Oda in Samegrelo, Korena in Imereti, etc. sell their services through Georgian and international tour operators.

5.11 Experimental tourism challenges during a pandemic

Increased restrictions, safety standards, barriers in the new regulation of post-COVID 19 limits host-visitor engagement and active interaction processes. The current situation is aggravated by recent political events in the Caucasus region. However, as experts and practitioners note, new opportunities have emerged against the background of existing challenges in the tourism market. In this regard, three areas have been identified:

- Transfer the experience of experiential tourism to the online practice of sharing specific experiences remotely;
- Emergence of domestic tourism development potential;



- Make short-term plans and make changes to the existing tourism strategy.

In the online format, gastronomy remains the most popular again. In addition, some tours focused more on meditation, healing the body and mind, city tours, etc. Online improvisational tours, despite pleasant communication, humour and pleasant mood, cannot replace real relationships and interactions. However, there are successful examples of online tours (the project of the dancer Melita). Here it is desirable to combine several different directions, as well as a single tour package.

Since the thematic workload is important, experts also recommend dividing such tours into professional and amateur. The pandemic has led to the rethinking of strategies and the need for short-term plans. In addition to online platforms, the pandemic has spurred the potential for domestic tourism development. Georgian culture is unknown to a significant part of the local population. According to Maya Kezevadze, the owner of the agro and gastro tourism facility "Korena ", the problem opened new opportunities for the promotion of domestic tourism and destination. Local stakeholders (entrepreneurs, DMO, hotel businesses etc.) joined their forces and implemented projects to support tourism in the region. One of such popular projects was "Musicians for Tourism support ". The goal of the project was to express the kind of solidarity of the musicians towards the tourism industry affected by the World Pandemic. It was aimed at popularizing tourism destinations, promoting cultural industry and offering alternative means of financing. The project was performed in 15 locations in different municipalities of the Imereti region. One of the outputs of cooperation in the Imereti region was also preparation of extraordinary maps of Imereti municipality.

6. Analysis and Summary of the Results

This chapter evaluates the main problem areas and development challenges for outlining remedy actions at policy-making and business level. It prepares the ground to formulate and propose recommendations and fields of interactions for further strategic planning of HCET, which will be described in RAP.

At present, consumers demand individual travel experiences - activities based on visiting cultural heritage places and combined with experiencing the local crafts or traditional arts, learning the elements of songs, dances, sports, as well as organizing crafts master classes. Also, they want to visit some not touristic, not fancy places at the outskirts. They need a profound knowledge of places and objects (not only the big roadside eateries and New York Times featured 5-star hotels but also extra) for tour planning. Proper knowledge of local customs and the ability to explain them without too much legend telling; and proper language knowledge. As research revealed that main directions in HCET in Georgia are 1) craft 2) culinary and gastronomy (food & wine), 3) polyphony and music. In addition, Datishvili & Khelashvili identified the 4) history of the Soviet era as components consisting of cultural tourism experiences in the county.



Post-modern customers look for destinations with more focus on value for money offers, while the image and stability of destinations also have a substantial impact. They are aware of social and environmental concerns, often adopting less consumption-driven, "green" lifestyles.

Young people, unfortunately, are no longer interested in the stories told by their parents, or they no longer want to learn crafts, which had previously preserved their past.

Besides the aforementioned intangible cultural heritage, Georgia's 70-year history in the Soviet Union is also of interest in the context of experiential tourism. Tourists are often attracted by SPA hotels and buildings from the post-Soviet period, modern cafe-bars opened in similar premises, and buildings with the same history. The Silk Road theme is forgotten, not visible on Georgian tourism national and regional markets.

Along with the growth of interest and demand for HCET practices, especially gastronomy and culinary practice, there occurs a niche for the marketing, promoting and safeguarding the goods, which carry the traditions of people and guarantee the intangible cultural heritage sustainability. One more mechanism of traditional crafts promotion and safeguarding is the copyright protection that favours the communities holding those rights and creates the precondition for protecting their products.

HCET is a new field in the country. This is a combined product of tourism and culture, which needs strong support from GNTA, the ministry of culture, MEPA, etc. Traditional products need government support and regulations to keep the identity of the products and processing using the concept of traditional product labelling and branding. When it comes to the development of HCET, it is important to understand the scope of its activities - the whole system and elements involved in HCET value chain. More recently the concept of resilience receives increasing attention in the discourse on transitions towards a more sustainable future of tourism and its socio-ecological adjustments to a rapidly changing world. It puts the process of capacity building at the centre of attention and implies transitions in governance, which enable communities' radical changes in ideas, and practices. Such participatory management mitigates conflicts among competing interests, increases the quality and legitimacy of solutions, and collaboration between various actors at all level. It ensures the coherence of individual projects and balanced and cost-effective trade-offs.

Today, there is no single structure that would promote and coordinate this field; and manage on all levels that follow a multisectoral interdisciplinary and participative approach. DMOs are strong partners at a regional level, but they are represented only in five regions.



Common borders. Common solutions.



Based on findings and all aspects mentioned above, the main constraints and challenges in HCET market can be summarized as following:

Figure 11 Identified problems and fields of intervention for the development of RAP

#	Identified problems (summarized)	Fields of intervention
1	<ul style="list-style-type: none"> - lack of diverse and target-oriented tour product (product for different market segment categories) - lack of additional services (such as organized tours) such as new routes and new tourist destinations, including water-related activities - seasonality, absence of winter offers 	Development of market oriented, high quality tour products and services
	<ul style="list-style-type: none"> - inadequate quality of services in accommodation facilities (including inadequate service, hygiene and comfort) - The lack of appropriate recreational and interpretation facilities in craft-studios for the reception of tourists, language barrier - Insufficient current selection of souvenirs and traditional craft workshops 	
2	<ul style="list-style-type: none"> - low awareness of innovative and thematic product development - lack of on-site entertainment elements, including festivals and other events - Lack of utilization of local resources for the diversification of the products - poor interest of youth in folk heritage development - Lack of locally produced products in tourism market and menu offered both in guesthouses and catering facilities 	Support community involvement in sustainable HCET product development, particuparely youth
3	<ul style="list-style-type: none"> - lack of innovative approach, digital marketing - Low visibility of HCET on the tourism market 	Enhence the visibility of HCET product and access to the tourism market
4	<ul style="list-style-type: none"> - approach, cooperation between different structures, both at the local and national level - Poor linkages among service providers (hampering the involvement of craftsmen's in the tourism market) 	Enhence a good cooperation at a regional and local level, governance and networking



Project funded by
EUROPEAN UNION



Annexes

Annex 1_The list of interwivers

1	Culinary	agritourism	Farm to table concept, permaculture, food tasting, ethnography	Lika Megrelidze	Komli	Ozurgeti	Tsitelmta
2	Culinary	agritourism	food tasting, Culinary masterclass, ethnography, folk	Maia Kezevadze	Korena	Tkibuli	Gelati
3	Culinary	agritourism	food tasting, master calsses, ethnography	Daka Berdenishvili	Skijis Sakhli	CHokhatauri	Khidistavi
4	Events	Rural tourism	wedding ceremonies	Inga Dumbadze	Agmoachine Guria	Ozurgeti	Shemokmedi
5	Culinary	agritourism	Ethnography, food and wine tasting, master classes	Marika Todua	Sisatura	ZUgdidi	CHkhorია
6	Crafts	Guesthouse	Crafts, history	Jemal Turmanidze	Guesthouse Mokvare	Keda	Merisi
7	Crafts	Art Studio	Crafts, ethnigraphy	Kemal Turmanidze	Ethno museum Borjgalo	Batumi	Batumi
8	Culinary	agritourism	Food and wine	Teona Taboridze	Melaan Vintage	GURjaani	Melaani
9	Culinary	agritourism	food tasting, Culinary masterclass, ethnography, folk	Rusudan Kalichava	Case de Khasia	ZUgdidi	ZUgdidi
10	Crafts	Art Studio	Crafts, ethnigraphy	Nino Arabuli	Khevsureti & Temi	Barisakho	Korsha
11	Culinary	agritourism	Food and wine	Shota Lagazidze	Lagazi	Akhmeta	Zemo Alvani
12	Crafts	Art Studio	craft	Otar vepkhvadze	Art Residence	Kaspi	Garikula



Project funded by
EUROPEAN UNION



13	Crafts	Art Studio	Crafts, ethnigraphy	Archil Artmelidze	Eco hostel Pinoccio	Batumi	Batumi
14	Culinary & Folklore	agritourism	Food and wine; georgian folk music	Slmona Ruadze	Simonai Zaodi	Gurjaani	Chumlaki
15	Culinary	Ethno restaourant	food & wine, master calsses	Maraim Merebashvili		Gori	Kheltubani
16	Culinary	agritourism	food & wine	Valodia Zazashvili	Valodia's cottages	Vardzia	
17	Crafts	Art Studio	POttery	Absnadze	Orkolis Studio	ZUGdidi	
18	Art	Art Studio	Art	Elene Gugushvili	Mkhatvris Sakhli	Oni	Oni
19	Art	Art Studio	Crafts, ethnigraphy	Maia Bidzinashvili	Nukriani Art Studio	Signagi	Nukriani
20	Culinary	agritourism	Food&wine	Ia Tabagari	Living Rooths	Signagi	Qedeli
21	Art		Art	Elene Rakviashvili	Elene Art	Tbilisi	Tbilisi
22	Culinary	agritourism	Food&wine	Keto Nlnidze	Megruli Oda	Martvili	Martvili
23	Culinary	agritourism	Food&wine and folk	Giorgi Aladashvili	Ruispiri	Telavi	Ruispiri
24	Culinary	restaurant	Food & Wine	Ana Khitarishvili	Badia	Telavi	Telavi
25	Art	MAster classes	Art Studio	Nino Bakhutashvili	Pesvebi	Dedoplistska ro	Dedoplistska ro
26	Crafts	MAster classes	Art Studio	Otar Sharabidze		Kvemo Kartli	Tetrtskaro
27	Culinary	agritourism	Guesthouse	Nazi	NAzi's guest house	Pankisi	
28	Folk	agritourism	Family Folk ENSamble	Malakmadze			
27	Crafts	Art Studio	Art Studio	Tamar	Mokheuri Teka	Stepantsminda	Kazbegi

Common borders. Common solutions.



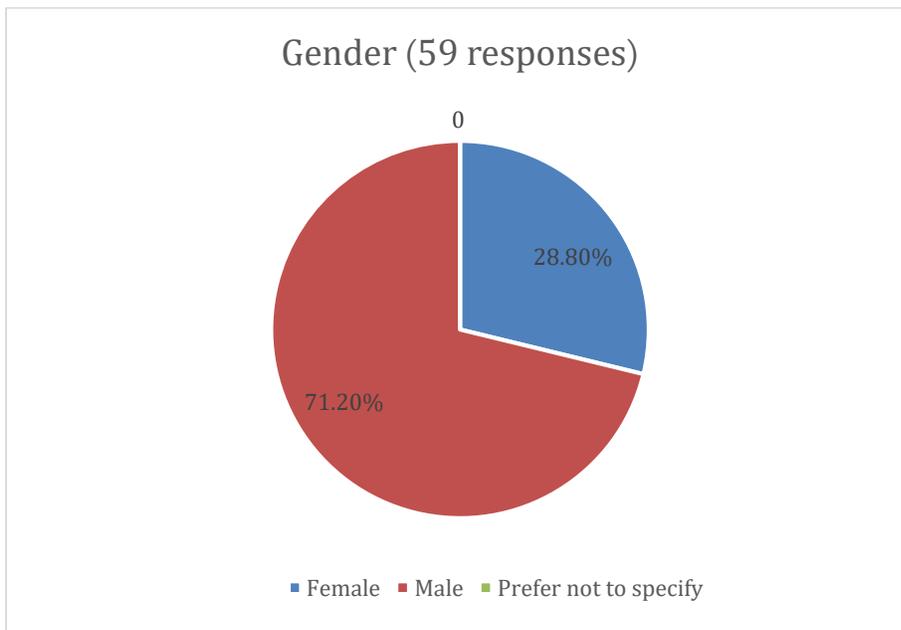
Project funded by
EUROPEAN UNION



28	Crafts	Art studio	guestouse and art	Nagervadze NATia	Guesthouse Tsiskari	Ajara	
27	DMO	tourism	managment	Mari Devidze		Kutaisi	Kutaisi
28	DMO	tourism	managment	Tina		Kutaisi	
29	DMO	tourism	managment	Markia Todua/Levan Tsuladze		Zugdidi	Zugdidi
30	GNTA	tourism	managment	Tamar aisuradze			Tbilisi
31	MEPA	agriculture, environment	governance	Natia Andguladze			Tbilisi
32	TSU	tourism	Education	Ioseb Khelashvili			Tbilisi
33	TSU	tourism	Education	Mariam Datishvili			Tbilisi
34	NGO	agritourism	training, lobbying	SOphe Barbakadze			Tbilisi
35	NGO	agritourism	training, lobbying	Nikoloz meskhishvili			Tbilisi
36	NGO	ecotourism	training, lobbying	Nata Robitashvili			Tbilisi
37	NGO	Crafts	training	Ana SHanshiashvili			Tbilisi
38	NGO	tourism	training, lobbying	Nata Kvachantiradze			Tbilisi
39	NGO	culinary	research	Levan Kokiashvili			Tbilisi

Annexe 2 _ Findings from the quantitative survey

Figure 1 Visitor respondents grouped by gender





Annex_3 Existing strategies, and policies, level of technology development concerning culture and heritage presentation

Georgian National Tourism Administration (GNTA) develops tourism policy in the country. The policy direction is a sustainable and profit-oriented tourism development model, which aims to increase the number of international travelers to Georgia by attracting quality higher spending tourists. The Strategy of Tourism 2025 considers conservation of Georgia's natural and cultural heritage, creation of unique and authentic visitor experiences centred on those natural and cultural assets, delivery of world-class visitor services, performances and building PPP partnerships that will be needed to achieve all of the above.

By Marketing, Branding and Promotion Strategy of Georgia (2017) '**Georgia Makes You Feel Good**' defines three major key segments of tourism products with the highest potential: **nature and adventure, cultural heritage and wine and cuisine**. Recently developed Ecotourism strategy 2020-2030 and 2-years action plan 2020-2022 of Georgia focuses on preservation of authentic living culture and development of thematic routes in certain regions of the country.

Culture Strategy of Georgia 2025 highlights Georgia as a creative country and regional hub where innovation and creativity, along with safeguarding and revitalizing national heritage and cultural diversity are the fundamental pillars of social wellbeing and sustainable development. In addition to traditional cultural fields, Culture Strategy 2025 is oriented on development of creative industries. This is one of the main instruments for strengthening business capabilities of the culture sector and sustainable development of the entire country as well.

The Ministry of Environment Protection and Agriculture (MEPA) stimulates non-agriculture initiatives, supported by ENPARD 'A New Approach for Rural Development in Georgia'; and promotes Rural Tourism, as a promising source for economy diversification - as an alternative source of employment in agricultural areas and mountain regions.

The practices of geographical indications, product labelling, marketing and quality assurance of traditional products have been introduced in Georgia since 2017. Among the 12 quality labels awarded by marketing council group at MEPA, there are awards on "protected geographical indicators", "protected designation of origin", "traditional product", "Georgian quality", "produced in a mountain region", "hand-made", etc. (SAKPATENTI, n.d.).



Common borders. Common solutions.



Project funded by
EUROPEAN UNION



The Association Agreement (AA) between the European Union and Georgia promotes cooperation in the field of tourism, with the aim of strengthening the development of a competitive and sustainable tourism industry (Article 9). The document also encourages the development of cross-border cooperation in other areas covered by this Agreement such as, inter alia, transport, energy, communication networks, culture, education, tourism, and health (374). The chapter of intellectual property rights (chapter 9, article 150), has highlighted following objectives: (a) facilitate the production and commercialization of innovative and creative products between the Parties; and (b) achieve an adequate and effective level of protection and enforcement of intellectual property rights.



Project funded by
EUROPEAN UNION



References

- European Travel Commission. (2020, November). *European Tourism: Trends & Prospects, Quarterly report (Q3/2020)*. Retrieved from <https://etc-corporate.org/uploads/2020/11/ETC-Quarterly-Report-Q3-2020-Final-Public.pdf>
- GACC. (2012). *The Heritage crafts in Georgia, Comprehensive Research and Development Strategy of the Sector*.
- GNTA. (2021). *International Travel (Residence) 2021*. Retrieved from <https://gnta.ge/statistics/>
- Khartishvili, L. (2020). *The concept of Experiential Tourism in Georgia*. GACC . Marketing, Branding and Promotional Strategy. (-).
- National Statistics Office of Georgia. (2020). *Gross Domestic Product (GDP)*. Retrieved from <https://www.geostat.ge/en/modules/categories/23/gross-domestic-product-gdp>
- Parliament of Georgia. (2020). *Association Agreement*. Retrieved from <http://www.parliament.ge/en/gavigot-meti-evrokavshirtan-asocirebis-shetanxmebis-shesaxeb/associationagreement1>
- SAKPATENTI. (n.d.). *Geographical Indicators*. Retrieved from <http://www.sakpatenti.gov.ge/ka/page/122/>
- UNESCO. (2019). *Representative List by The Convention for the Safeguarding of Intangible Cultural Heritage of UNESCO*. Retrieved from unesco.org
- WTTC. (2019). *Economic Impact Reports*. Retrieved from <https://www.wttc.org>

The editor of the material: Georgian Arts and Culture Center

Address: Georgia, 0108 Tbilisi, 7 Niko Nikoladze str.

Phone: +995 5995 06448

E-mail: maka@gaccgeorgia.org

Website: www.gaccgeorgia.org

Joint Operational Programme Black Sea Basin 2014-2020

Georgian Arts and Culture Center

January 2021

Joint Operational Programme Black Sea Basin 2014-2020 is co-financed by the European Union through the European Neighbourhood Instrument and by the participating countries: Armenia, Bulgaria, Georgia, Greece, Republic of Moldova, Romania, Turkey and Ukraine.

This publication has been produced with the financial assistance of the European Union. The contents of this publication are the sole responsibility of Georgian Arts and Culture Center and can in no way be taken to reflect the views of the European Union.