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ORIGINAL ARTICLE

Wine tourism destination competitiveness: The case of Georgia

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Abstract – Being a highly competitive tourism destination means contributing to the better standard of living for the local community while having sustainability in focus. This paper aims to discuss the most important factors which make Georgia a competitive wine tourism destination. Georgia is often referred to as the birthplace of wine and has its culture and traditions deeply connected to it. The country has authentic food and wine heritage which is a central point for its renowned hospitality. Ancient wine culture attracts present-day curious visitors. The study overviews the academic literature on the key concepts and analyses the wine tourism industry in Georgia. The research summarizes that the country as a wine tourism destination has great opportunities to be competitive. Its history, traditions, hospitality, nature, and other qualities are inherited resources that can attract high-spending visitors and hence contribute to the well-being of the local community. On the other hand, there are some issues and threats that must be tackled for long-term success. The paper suggests that learning the topic with empirical methods is necessary.

Keywords – wine tourism in Georgia, tourism destination, wine destination, Georgian wine, tourism competitiveness index

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Introduction

Georgia, located in the Caucasus, is rich with natural and cultural resources. It is a trendy touristic spot frequently positioned as a wine tourism destination by Georgian National Tourism Administration (GNTA) - the main tourism management body in the country. Georgia is counted as a cradle of wine based on the archeological discoveries and results of research conducted by McGovern et al. (2017). As Georgia's wine export (National Wine Agency of Georgia, 2019) and marketing efforts increase, awareness of the travelers about Georgian wine heritage is expanding too.

The uniqueness of Georgian wines roots in the winemaking technology which has been practiced for at least 8000 years (Anderson, 2013; McGovern et al., 2017; Azmaiparashvili, 2018). The traditional winemaking technology is utilized to produce several styles of wines, however, two of them are the most common: wines of the West and the East of the country. In the East, the wines tend to be stronger while the West offers lighter-bodied wines. Wine is produced almost everywhere in Georgia except in high mountains. The largest and most ancient wine region is called Kakheti and it is the biggest wine tourism hub too.

The niche attraction of Georgia is actively used in the positioning of the country by GNTA targeting tourists from the world's highest-spending travel markets (Georgian National Tourism Administration, 2015a). Georgian National Tourism Administration (2015), as well as World Bank (2019), consider wine traditions and culture as an important attractor of the travel markets which are eager to experience something authentic and distinctive. Having potential for differentiation among the wine tourism destinations of the world greatly pushes forward the competitiveness of Georgia (Carmichael and Senese, 2012; Dimoska and Trimcev, 2012).

In this paper, wine, tourism and wine tourism sectors of Georgia are described; afterwards the concepts of a tourism destination and its competitiveness are introduced; later, Georgia and its competitor destinations are examined through the Travel & Tourism Competitiveness Index (TTCI) and finally, the country is overviewed based on Ritchie and Crouch's destination competitiveness model (Ritchie and Crouch, 2003d).

Wine, tourism and wine tourism in Georgia

Tourism significantly contributes to the economy and employment in different countries, and Georgia is not an exception. Georgia's tourism has been growing rapidly in

the recent years in terms of both international visitor trips shown in Table 1 and expenditures in Table 2.

Table 1. International visitor trips to Georgia from 2015 to 2019

Year	Growth compared to previous year	Number of international visitor trips
2015	+5%	5 255 999
2016	+2.6%	5 392 816
2017	+20.2%	6 482 830
2018	+11.1%	7 203 350
2019	+7.3%	7 725 774

Source: Georgian National Tourism Administration (2015b, 2016, 2017, 2018b, 2019b)

Table 2. International visitor expenditures in Georgia from 2015 to 2019

Year	Total expenditure by international visitors (billion GEL)
2015	4.1
2016	4.4
2017	5.8
2018	7.9
2019	8.5

Source: Georgian National Tourism Administration (2015b, 2016, 2017, 2018b, 2019b)

In 2019 international travel receipts increased with 1.45% compared to the previous year and amounted 3.27 million USD (Georgian National Tourism Administration, 2020a). Share of tourism in GDP of the country was raising too and has reached 8.1% in 2019 as presented in Figure 1.

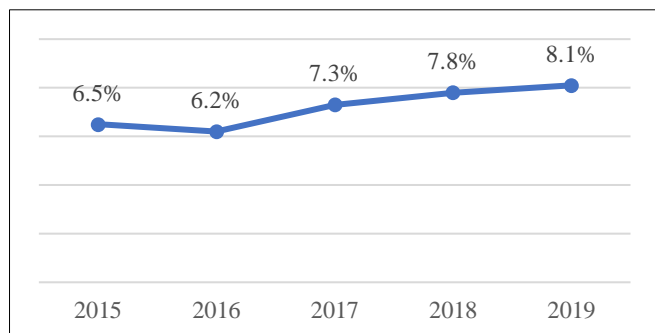


Figure 1. Share of tourism in GDP by Georgian National Tourism Administration (2020).

A wine industry has a remarkable importance in Georgian economy, similarly to tourism. Georgia’s wine sector is having a renaissance. As regard of the wine production, Georgia stood on 23rd place in 2016 among the countries of the world and it still lags many wine destinations in terms of quantity (*OIV Advanced Search on Database*, no date). Even though wine production is not massive in Georgia, the share of export (in 2016) in its total production is fairly high - 42.5% (*OIV Advanced Search on Database*, no date); exporting wines internationally contributes to the Georgia’s image as a wine producer and might encourage wine lovers to visit the destination.

Wine export has been emerging steadily in the recent years shown in the Figure 2; wine reached 6% in the share of major commodities exported in 2019 (National Statistics Office of Georgia (Geostat), 2020) which means that it has fourth largest share among export products.

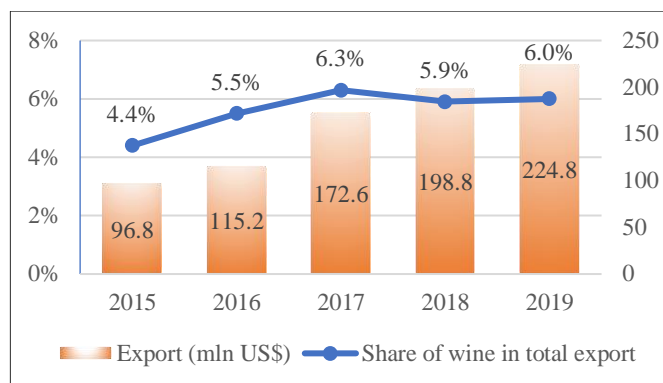


Figure 2. Share of wine in total export and export revenues of wine between 2015 and 2019 (National Statistics Office of Georgia (Geostat), 2020).

Georgia has six viticulture and winemaking regions: Kakheti, Kartli, Imereti, Racha, Black Sea Coastal Zone and Meskheti (National Wine Agency of Georgia, no date), 20 Protected Designations of Origin (PDO) for wines, and 521 indigenous grape varieties (*OIV Advanced Search on Database*, no date) which are yet unexplored.

Wine and tourism industries have often resulted in a successful collaboration. In order to measure the success, statistical data and research is necessary. Contrary to the leading wine destinations, Georgia lacks the statistical data and scientific studies about wine tourism. However, general tourism statistics of the country provides us with some basic data regarding wine tourism. For instance, in 2019 the highest share of the visitors’ expenditures was spent on food and drinks (27.5%) and tasting Georgian cuisine and wine also had highest portion (74.8%) among the activities undertaken by visitors (Georgian National Tourism Administration, 2019). In addition to this information, the research carried out by Georgian Wine Association in 2014 gives some idea about wine tourism in Georgia, but unfortunately the study has certain limitations of having small sample (310 respondents) of wine tourists (Georgian Wine Association, 2014), and no continuity, as it was published only once, in 2014. Regardless of the limitations, it is useful to comprehend some aspects of the sector in the country following this secondary data.

The largest age groups of wine tourists in Georgia are 25-35 (38%) and 37-45 (34%); while gender is equally distributed; greatest majority are from Georgia (65%) followed by Ukraine (9%) and Western Europe (8%); most of them travel with friends (38%) and with family (33%); 40% travel for leisure; 43% of wine tourists spent or would spend 31-60 EUR in one day wine tour in Georgia and 31% spent or would spend 0-30 EUR; the majority (56%) think that two days are optimal for the wine tour; their main information source about wine tours is internet

(33%), followed by advice from friends and relatives (24%) and social media (18%) (Georgian Wine Association, 2014).

Wine tourists in Georgia consider that three most important elements that could convince them to visit a winery or a wine region are culture and history (21%), tasting of local food and wine (18%) and wine tasting (15%), followed by other stimulus like having good time with friends and colleagues etc.; most of the wine tourists prefer medium class hotel (55%) and guesthouse (27%); the highest number of wine tourists advise to improve road access or general accessibility (25%), accommodation (17%), guide service (16%) and so forth; 38% of wine tourists rank wine tour in Georgia with “4” (1 – Georgia was worst experience and 5 – Georgia was best experience) when comparing it to any wine tours in other countries, followed by 32% who voted “3”, 19% who voted “5”, 9% - “2” and 2% - “1”; 97% of wine tourists would recommend travelling to Georgia to other wine lovers (Georgian Wine Association, 2014).

It is evident that continuous, deeper and larger scale research must be provided in order to understand whether the road accessibility and other issues have been improved in view of wine tourists; also, to learn whether the desired expenditures have been modified through time; and to learn other indicators which would help wineries, residents, other stakeholders and tourism board in taking correct actions and planning wine tourism development better.

Tourism destination and its competitiveness

To conceptualize tourism destination competitiveness, it is necessary to understand the terms such as tourism destination and destination competitiveness separately.

Destination is an amalgam of products and services such as restaurants, guides, transportation service, accommodation, museums, parks, lakes, local businesses and so forth; these form tourists' overall impression and the image of the area (Buhalis, 2000; Murphy, Pritchard and Smith, 2000). During the visit, in a best-case scenario, the experience offered by a destination will match the expectations of the travelers. In worse cases, the expectations are not met, and travelers are disappointed. These differences occur due to the varied cultural background, other travel or life experiences of the tourists or even their education (Buhalis, 2000).

Besides being an amalgam of experiences and products and a total tourist offer, a destination can be viewed as a geographical space or region which is perceived as one entity by the travelers (Buhalis, 2000; Ritchie and Crouch, 2003b). In the case of wine tourism destination, normally wine related activities are the center of attention. Napa Valley in California, Rioja in Spain, Tuscany in Italy, and Mendoza in Argentina are very famous examples.

Tourism destinations are complex to manage due to the existence of many participants, or so-called stakeholders, who are involved in the creation and development of tourism offer (Sautter and Leisen, 1999; Buhalis, 2000). In Georgia, the number of specific organizations has been increasing dramatically. For instance, in April 2020 the number of officially registered wineries in the country was 928, while 10 years ago it could not even reach 80 (National Statistics Office of Georgia (Geostat), no date).

Tourism destination competitiveness is widely studied theme. Researchers agree that destination competitiveness applies to the tourists' total experience (Dwyer *et al.*, 2004) and that it has economic, socio-cultural and environmental dimensions (Kozak and Andreu, 2006). According to Crouch (2008). Destination competitiveness studies have three main directions; one of these directions focuses on identifying the competitiveness position of a particular destination (Paas, 2004; Dwyer *et al.*, 2016; Andrades and Dimanche, 2017; Reisinger, Michael and Hayes, 2019); other authors choose the direction which researches any specific topic related to competitiveness (Hallmann, Zehrer and Müller, 2015; Goffi, Cucculelli and Masiero, 2019; Kubickova, 2019; Queiroz Neto *et al.*, 2019), it can be image, management, regulations and so on; and finally, some authors work on the elaboration of the destination competitiveness models and theories (Dwyer, Forsyth and Rao, 2000; Cucculelli and Goffi, 2016; Knežević Cvelbar *et al.*, 2016).

Travel & Tourism Competitiveness Index 2019

Since competitiveness has a comparative nature, description of a destination without comparing it with some competitors would lack a credibility. Thus, this research utilizes the Travel & Tourism Competitiveness Index (TTCI) 2019 data (Uppink Calderwood and Soshkin, 2019) for comparing Georgia with its rivals.

World Economic Forum conducts rigorous analysis in order to publish biennial Travel & Tourism Competitiveness Report which presents the TTCI based on four subindexes, 14 pillars and 90 indicators (Uppink Calderwood and Soshkin, 2019). In 2019 the report which aims to measure “the set of factors and policies that enable the sustainable development of the Travel & Tourism (T&T) sector, which in turn, contributes to the development and competitiveness of a country.” (Uppink Calderwood and Soshkin, 2019:ix) has analyzed 140 economies through the following four subindexes: *Enabling Environment*, *T&T Policy and Enabling Conditions*, *Infrastructure* and *Natural and Cultural Resources* (Uppink Calderwood and Soshkin, 2019).

There are numerous wine tourism destinations in the world which compete with Georgia, but as we cannot overview all of them, it is more convenient to choose the rivals based on some criteria. In the selection process, two factors were used, a location and a profile of a wine tourism destination. Wine producing countries are divided into “Old World” and “New World” from which the “Old

World” refers to the ancient wine producers, mainly located in Europe and Mediterranean such as Italy, Hungary, Austria, Bulgaria, Spain, Greece, France, Portugal, Romania and Switzerland; and the “New World” countries are the ones outside of Europe such as USA, Canada, Australia, New Zealand, Argentina, Chile, Mexico, Peru, South Africa, Brazil and Uruguay (Aleixandre *et al.*, 2016). While Georgia is an ancient wine producer located on the crossroads of Europe and Asia, its competitors are chosen from the “Old World” area. There are places other than Georgia where people produced wine for centuries, but they are neither the largest wine producers nor well-known wine tourism destinations. As it was necessary to determine the competitors based on their profile, the countries, which are not deemed as major wine producers but who are eager to develop wine tourism, were chosen.

Tourism strategies, tourism board websites and some official brochures of the lesser known “Old World” wine countries were analyzed (GNTO, no date; Ministry of Tourism, no date; Slovak Tourist Board, no date; Ecological Counseling Center Cahul, 2012; The government of the Republic of Croatia, 2013; World Bank, 2015; Magyar Turisztikai Ügynökség, 2017; Slovenian Tourist Board, 2017) and eight destinations were determined to be actively developing wine tourism. These countries are Croatia, Armenia, Hungary, Romania, Slovenia, Moldova, Greece and Slovak Republic, and they can be referred as emerging wine tourism destinations together with Georgia. In the following sections of the study, where applicable, Georgia’s travel and tourism competitiveness will be discussed in comparison with these economies (referred as “competitors” in the text).

To have a clear idea about the competitiveness of each of these eight countries, a Table 3 with the rankings of TTCI 2019 is provided.

Table 3. The Travel & Tourism Competitiveness Index (TTCI) 2019

Economy	Ranking
Greece	25
Croatia	27
Slovenia	36
Hungary	48
Romania	56
Slovak Republic	60
Georgia	68
Armenia	79
Moldova	103

Source: The Travel and Tourism Competitiveness Report 2019 by World Economic Forum (Uppink Calderwood and Soshkin, 2019)

Ritchie and Crouch’s destination competitiveness model: the case of Georgia

There are several benefits that wine tourism can generate for the country, local community, and businesses such as

promotion, sales (Alonso *et al.*, 2015) and brand loyalty (Koch, Martin and Nash, 2013) for the wineries; and economic, cultural and social assets for the wine regions (Carlsen and Dowling, 2001); as Georgia has resources and heritage associated with wine, it can take advantage. Georgia as a wine tourism destination will be overviewed below following the model in Figure 3, created by Ritchie and Crouch, which is based on more than eight-year research; the authors used qualitative research methods to find out the determinant factors of the tourism destination competitiveness (Ritchie and Crouch, 2010). This conceptual model is not developed for a particular destination, rather it is more general and can be applied to any destination (Crouch, 2008). The model has focused on comparative and competitive advantages while dealing with destination policy, tourism management, planning, and marketing; it is also referred to as the most complex and comprehensive models (Mazurek, 2014). It is already a consensus that for the long-term success of the tourism sector, sustainability and community must be in focus; Ritchie and Crouch’s model emphasizes the importance of the both. Due to all the above-mentioned reasons, and the literature review (Crouch and Ritchie, 1999; Buhalis, 2000; Ritchie and Crouch, 2003d; Beeton, 2005; Kozak and Andreu, 2006; Mazurek, 2014), this research considers Ritchie and Crouch’s model as an up-to-date guide for studying the competitiveness of the destination.

As Crouch and Ritchie (1999) explain, a destination has a micro and macro competitive environments. Georgia, which is a subject of this research, has a specific microenvironment “within which a destination must adapt to compete” (Crouch and Ritchie, 1999:146). It embraces the destination itself; travel trade representatives such as local tour operators i.e. Exotour, Discover Georgia, Caucasus Travel; drivers and guides; accommodation suppliers; competitor destinations such as Armenia, Slovakia, and Croatia and other emerging wine tourism destinations; residents and other players.

On the other hand, the macro environment is referring to global forces which can have some effect on the destination competitiveness; as an example of such force for Georgia, we could mention the war of 2008 which harmed the attractiveness and safety, and consequently the competitiveness of the destination. Moreover, in summer of 2019, Russia, one of the biggest tourist markets for Georgia (Georgian National Tourism Administration, 2019), banned the flights to Georgia which had to hurt the tourism industry and economy of the country; however, a sound campaign on social media, primarily called “spend your summer in Georgia”, rescued the destination from the crisis. Therefore, the growth rate of arrivals from Russia dropped by 11.1% in the second half of 2019 which was balanced by the raise of a growth rate from Kazakhstan, Israel, Ukraine, EU, Armenia, Azerbaijan and Turkey (overall 11.7% increase in the second half of 2019) (Galt & Taggart, 2020).

Both micro and macro environments have a great influence on the destination and its image and it is important to be

able to adapt to some of the global major changes or the micro-level environment; for this reason, it is wise for destination management organizations to permanently

observe the ongoing situation in the world and inside of the country.

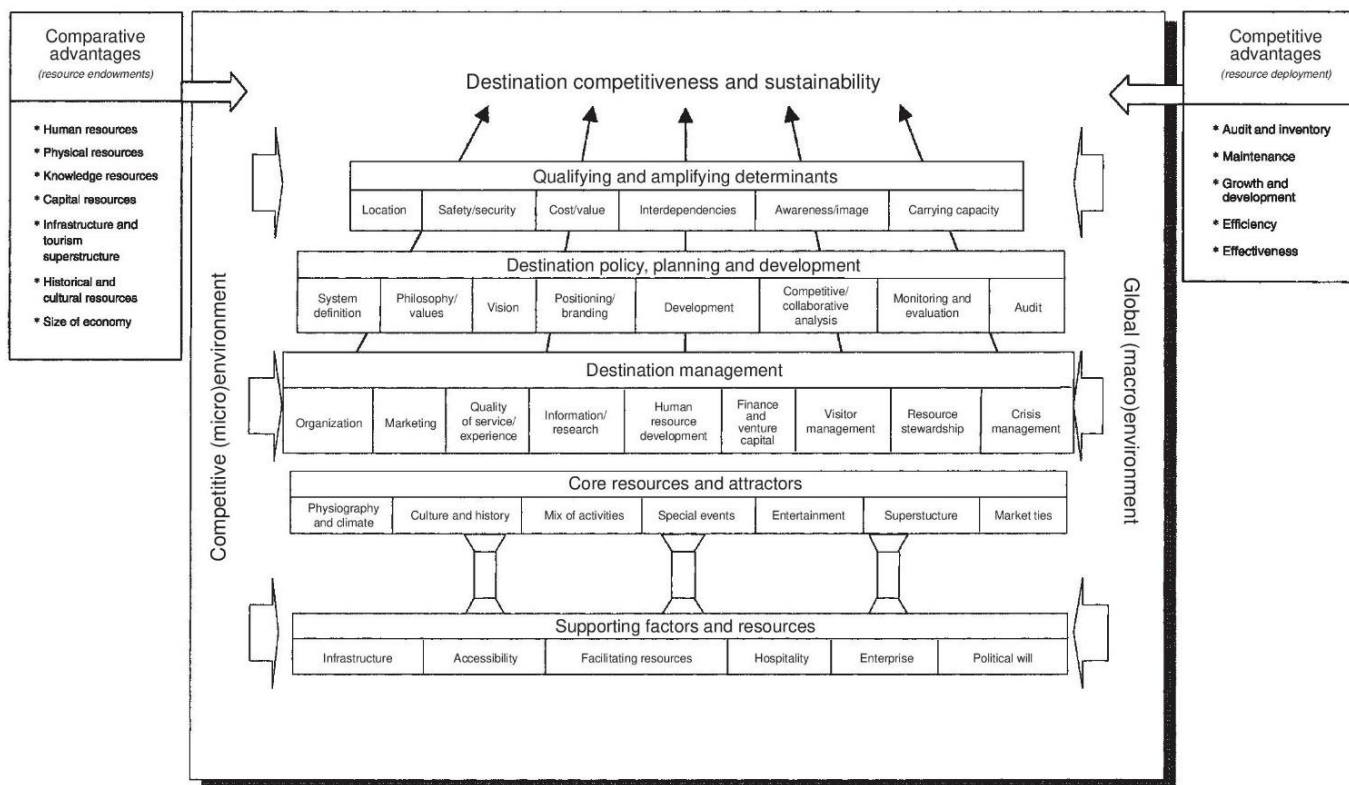


Figure 3. Conceptual model of destination competitiveness by Ritchie and Crouch (2003a:63)

Ritchie and Crouch’s model consists of several components such as *core resources and attractors*; *supporting factors and resources*; *destination management*; *destination policy, planning and development* and *qualifying and amplifying determinants* (Ritchie and Crouch, 2003a:63). Each of them will be briefly overviewed based on the case of Georgia.

Core resources and attractors

Core resources and attractors play a major role in the decision-making of the travelers when they choose one destination over another (Crouch and Ritchie, 1999; Ritchie and Crouch, 2003a). All the core factors that motivate tourists to visit a place are divided into seven groups: *physiography and climate*, *culture and history*, *market ties*, *mix of activities*, *special events*, *entertainment* and *superstructure* (Ritchie and Crouch, 2003a). Below we explain how these determinants turn Georgia into an attractive destination.

Physiography and climate are the nature, landscape, climate, and the environment which attract visitors by their aesthetical values. Georgia’s physiography is appealing to visitors. Its mountainous sceneries in Tusheti, Kazbegi, Svaneti, Racha, and other locations are stunning. Vineyard terrains in regions like Kakheti, Imereti, Kartli, and others are impressive. Flora at the seaside of the Black Sea with numerous lakes, forests, rivers, and nature reserves form a

magnificent destination. World Bank (2019) precisely summarizes the physiographic resources of Georgia: “Georgia has extraordinary natural endowments - high mountains, a coastline, and vast nature reserves - coupled with a rich cultural heritage and renowned hospitality.” (World Bank, 2019:3). While for some of the tourist markets physiography and climate are still the main motivator of the travel, Georgia has a great advantage in these terms.

Culture and history are the factors that can be considered as the major strengths of Georgia. Georgia has a culture related to wine which is authentic and interests the curious visitors. As 8000 years ago ancestors of Georgian people were already fermenting the grape juice and enjoying the wine, it makes clear why the local culture and lifestyle is formed all around the grape, vineyard, and wine; some significant facts reinforce this opinion.

Firstly, the research, called Early Neolithic Wine of Georgia in the South Caucasus, studying the wine origins states: “The earliest biomolecular archaeological and archaeobotanical evidence for grape wine and viticulture from the Near East, ca. 6,000–5,800 BC during the early Neolithic Period, was obtained by applying state-of-the-art archaeological, archaeobotanical, climatic, and chemical methods to newly excavated materials from two sites in Georgia in the South Caucasus.” (McGovern et al., 2017:1).

Only after this scientific acknowledgment, we can count Georgia and its wine culture as the primary one. Understandably, along the 8000 years the nation integrated the grape, wine, and vineyard work in its culture so much that it has transformed into the inseparable part of the community's life and its cultural existence (Harvey and Jordania, 2014).

Secondly, there are several artifacts, ancient records, manuscripts and traditions in Georgia that show the importance of wine for the locals (Harvey and Jordania, 2014). It is a well-known fact that when the conquerors were attacking the country, the first thing they destroyed was the vineyards, because they knew that the life of Georgians was strongly dependent on vine and viticulture.

Thirdly, Georgian *Supra* - the feast is one of the traditions that Georgian men keep sacred. For the *Supra* people cook traditional food which is always complemented with the wine; the feast is usually led by *Tamada* or the toastmaster who says the toasts time to time; the toasts are devoted to different topics such as religion, God, St. Mary, friendship, motherland, host family, guests, love, etc. The members of the feast are supposed to propose the toasts about the same topic that is suggested by the toastmaster.

The wines on *Supra* are often drunk with Caucasian ibex's horns called *Kantsi*, however, Georgians have many other ancient dishes for drinking wines, such as bowl - *Piala*, *Marani*, *Azarpesha*, *Kula*, *Karkara*, etc. The number and variety of wine dishes once again prove the greatest importance of the wine for Georgians.

The feast is normally accompanied by Georgian traditional dance and polyphonic singing which is listed as a UNESCO intangible heritage. It is very habitual to held Georgian feast for celebrations, birthdays, weddings, friends' gatherings, visitation of guests, etc. For centuries till the modern-day Georgian people share wine and *Supra* with the guest, as drinking and feasting alone is unacceptable in the community. This is a very positive local tradition that creates memorable experiences for many travelers too and can be counted as competitive advantage for the tourism destination (Ritchie and Crouch, 2003a).

Finally, the production of the wine in Georgian families is a sacred ritual that typically is shared with the whole family, neighbors, and friends. Each harvest is finalized with the Georgian feast. It is important to note that many families open the cellar doors for the tourists. Moreover, there are many cases when the people who entire life lived in the capital decide to move to regions to produce wine and to provide a wine tourism experience. It is impossible not to be enthusiastic and interested in wine when the country is celebrating number 8000 vintage with the constant winemaking technology, and when it has 521 indigenous grape varieties (*OIV Advanced Search on Database*, no date) to be experimented with, mastered, and used in winemaking.

A great example of *market ties*, which is one more factor involved in *core resources and attractors*, is the highest

number of arrivals from the former Soviet Union countries as shown in Table 4; these countries are Azerbaijan, Russia, and Armenia. Georgia was one of the most well-known tourist destination for Soviet Union travelers (Khartishvili *et al.*, 2019); as World Bank (2019) notes, the neighboring former Soviet Union countries keep visiting Georgia as in their memory it is a standout recreational destination; besides, "proximity, low prices, familiarity, and language" are the additional factors that motivate and ease the travel to Georgia for the mentioned segments (World Bank, 2019:3). Even though this market is not the one that Georgia gains the highest profit from, it helps the destination to have a stable tourist flow.

Table 4. Distribution of the number of inbound visits (visitors of age 15 and older) by country of citizenship in 2019

Countries	Number of visits	Share in total
Azerbaijan	1 526 400	19.8%
Russia	1 471 200	19%
Armenia	1 365 600	17.7%
Turkey	1 156 800	15%
Georgia	488 400	6.3%
Ukraine	207 600	2.7%
Israel	205 200	2.7%
Iran	141 600	1.8%
EU Member Countries	484 800	6.3%
Other Countries	678 000	8.8%
Total	7 725 600	100%

Source: National statistics office of Georgia (no date a)

Mix of activities have a key role in defining the competitiveness of the destination and tourism boards can have great control over it (Ritchie and Crouch, 2003a). Nowadays visitors tend to prefer individual, independent and unique experiences over big group visits and mass tourism (Fang, 2020). In Georgia, wine-related *activities* involve winery visits, vineyard tours, meals in the vineyards, cooking masterclasses with local families where visitors are engaged. During the harvest tourists can participate in winemaking processes of the host families; they help in picking the grapes, pressing them with feet, making the special Georgian dessert *Churchkhela*, and finally having the meal at Georgian *Supra*. The listed activities are mainly focused on the wine and winemaking traditions, but the country has far more appealing experiences for travelers including skiing and snowboarding in winter; paragliding; water sports such as rafting, canoeing; also, hiking, birdwatching, swimming, water cruising, and others. To sum up, the *activities* aid forming tourists' memorable experiences and destinations are more competitive if they manage to provide distinctive adventures where people can be actively involved and satisfied.

It is no surprise that *special events* attract many visitors and contribute to the destination image too. *Special events* allow countries or regions to transmit their message to a wide audience. Wine events and festivals are held regularly in Georgia. In the genesis of Georgian wine tourism development, the events were held just in the capital; today

the travelers have many event options from various regions. While for Georgian people wine is the center of the lifestyle, they involuntarily create real festivities with the wine in focus. It became so successful that the wine festivals, exhibitions, and events are held with higher frequency already throughout the year and on the bigger venues to be able to accommodate a striking number of visitors. Very popular wine festivals in Georgia are attended by a proportion of a local community and by many foreign guests and wine enthusiasts; “Georgian Wine Week”, “New Wine Festival” and “Cheese and Wine Fest” are some examples.

The tourism *superstructure* is one more unit of the *core resources and attractors* of the Ritchie and Crouch’s model which comprises of accommodation, food and transportation facilities and other attractions related to tourism (Crouch and Ritchie, 1999; Ritchie and Crouch, 2003a). Having enough accommodation resources in regions is crucial for wine tourism development, as it is mainly concentrated in rural areas. The number of accommodations raises every year, as shown in Table 5. Tourists visiting Georgia have many options to choose from: hostels, boutique hotels, luxury hotels, homestays, guesthouses and so forth.

Table 5. General Information about hotels and hotel-type enterprises in Georgia

Year	Number of hotels
2014	986
2015	1225
2016	1496
2017	1595
2018	1639

Source: National statistics office of Georgia (no date b)

Transportation facilities are not very well developed in every region of Georgia. As an example, there is a railway from Tbilisi to the West of the country but the train schedule is limited and there are not many options of a journey to choose from; during the high seasons finding a ticket is complicated unless you book long time ahead. Moreover, there is no train leaving towards the East of the country. The only option to reach most of the regions is by car, taxi, or minibus. Often prices of transportation services are low, but the quality is low, too. Transportation facilities are essential for meeting the travelers’ expectations related to comfort and safety which contributes to the tourists’ overall satisfaction. Responsible bodies in Georgia should consider to better manage and differentiate transportation offers and improve their quality.

Georgian tourism board sets its goals regarding the tourism *superstructure* in Georgia Tourism Strategy 2015-2025 (Georgian National Tourism Administration, 2015a); improvement and modernization of visitor services, transportation, accommodation, and other tourism facilities are listed in the tourism development goals of GNTA (Georgian National Tourism Administration 2015). It is a very positive sign to find the above-mentioned challenges in the strategy because without properly developed *superstructure* it is inconvenient to seek attracting high-spending tourism markets.

Lastly, *entertainment* is the final component of the *core resources and attractors* to be discussed based on the example of Georgia. The *entertainment* such as gambling, festivals, concerts and operas amuse the tourists and locals in Georgia. *Tsinandali festival* is a new initiative which brings world’s greatest musicians and music admirers in the middle of the Kakheti wine region for leisure, education and exploration; the festival is an opportunity for Georgian wine industry and wine tourism to form unforgettable memories in the visitors’ minds, to spread the word-of-mouth, and finally, to contribute to the destination image through the information sources that broadcast the news about the event (Tsinandali Festival, no date).

Supporting factors and resources

Based on Ritchie and Crouch’s (2003a) model, *supporting factors and resources* aid *core resources and attractors* in development of tourism industry. Normally, *core resources and attractors* alone are not capable of tourism establishment in the destination (Ritchie and Crouch, 2003a). *Supporting factors and resources* include *infrastructure, facilitating resources, enterprise, hospitality, accessibility* and *political will* (Ritchie and Crouch, 2003a).

Some branches of *infrastructure*, such as transportation, have a great value in destination competitiveness. Tourism has itself emerged along with the transportation development. Contemporary transportation has to be safe, clean, fast, reliable, efficient, good quality and most importantly, it should reach the tourist attractions (Ritchie and Crouch, 2003a). Transportation services in Georgia was already described as the part of *superstructure* in *core resources and attractors*. Other components of infrastructure like healthcare, education and telecommunication are as well supporting the tourism sector. Georgia ranks 66th in *infrastructure subindex* of TTCI 2019 evaluated according to the availability and quality of the countries’ physical infrastructure (World Economic Forum, 2019b). Even though Georgia’s *infrastructure subindex* score (3.5) is slightly lower than the median score (4.27) of all economies, it overtakes four of its competitor destinations: Slovak Republic (68th), Romania (70th), Armenia (81st) and Moldova (107th), (World Economic Forum, 2019b). The country still has to focus on infrastructural improvements in order to catch up the rest of the competitors and other excellent wine tourism destinations like United States (1st), Spain (4th), France (11th), Austria (12th) and so forth (World Economic Forum, 2019b).

Facilitating resources is described by Ritchie and Crouch as “the availability and quality of local human, knowledge and capital resources, education and research institutions, financial institutions and various areas of the public service.” (Ritchie and Crouch, 2003a:70). To demonstrate Georgia’s position in case of one of the above-mentioned components, *Human resources and labor market index* belonging to TTCI 2019 is used (Uppink Calderwood and Soshkin, 2019); it ranks Georgia 54th with a score of 4.7, which is the same as the median score for all countries; and falls behind just two of its competitors being Armenia (52nd)

and Slovenia (40th). Georgia has a satisfactory ranking, but an improvement is always desirable.

As of research, for Georgia it is crucial to initiate tourism related scientific activities and stimulate students and professionals to analyze the past and present issues in the sector and support the quality of future tourism development. Currently, GNTA holds a conference which aims to demonstrate students' innovative ideas about country's tourism policy and development; however, unfortunately, the conference papers lack scientific background and many of them have either no literature review or are excessively based on the online sources (Georgian National Tourism Administration, 2018c, 2018d, 2020b); evidently, more effort needs to be made for collecting higher quality studies.

About the *enterprise*, the World Bank referred Georgia as one of the top reformers in the world as it showed outstanding results for three years in a row (World Bank and International Finance Corporation., 2007); for instance, in Georgia, it is possible to open the business in approximately one hour without loads of documents and bureaucracy. Georgia improved its position to 6th according to the Doing business report 2020 (World Bank, 2020). Moreover, in the *Business environment* component of TTCI 2019 Georgia occupies 24th place which is higher than all competitors (Hungary – 88th, Slovenia – 87th, Armenia – 31st, Slovak Republic – 105th, Croatia – 123rd, Moldova – 107th, Greece – 119th) and many other well-established wine destinations (Uppink Calderwood and Soshkin, 2019). Having this advantage, small Georgian companies can generate income by realizing their tourism or wine-related ideas in a short period.

Without a warm *hospitality*, destinations having abundant touristic resources would struggle to please and welcome the travelers. As Georgians are one of the most hospitable nations in the world, receiving the guests, or in the modern-day – tourists, is their inherited talent. They manage to introduce their wine culture to foreign guests authentically. Therefore, travelers can easily make friends and take some unforgettable memories back home.

When a destination aims to be competitive, one of the crucial factors is *accessibility*, for instance, in terms of entry visa procedures or visa-free policies (World Tourism Organization, 2016). World Tourism Organization (2016) emphasizes the significance of the openness for the tourism growth and notes that many countries have greatly progressed in entry facilitation in 2015; however some visa policies still are an impediment to the tourism growth (World Tourism Organization, 2016). According to the *visa requirements* component of TTCI, measured on the basis of “visa requirements for entry in the destination country for a tourism visit of a limited duration from worldwide source markets”, Georgia ranks 36th and it surpasses its competitors such as Croatia (85th), Hungary (85th), Greece (85th), Slovenia (85th), Slovak Republic (85th), Romania (85th) and falls behind of just Moldova (23rd) and Armenia (31st) (World Economic Forum, 2019c). The easy accessibility is a

positive feature when tourism management bodies know the destination's carrying capacity to remain sustainable as well as competitive while receiving tourists.

Rapid tourism growth in Georgia began in early 2000th due to the *political will*. The current as well as previous governing parties of the country were putting the trust in tourism as the way of rural development and poverty reduction. With the political initiative GNTA was established in 2010 (Georgian National Tourism Administration, 2018a) who is responsible for strategic planning and implementation. Without political support and stimulus, tourism has low likelihood of progress.

Destination policy, planning and development

The next two sections, namely *destination policy, planning and development (DPPD)* and *destination management* are strongly related to each other. *DPPD* is mainly a macro-level process of desirable destination formation by following the pre-defined vision (Ritchie and Crouch, 2003b). On the contrary, *destination management* is a micro-level function which involves the activities by the stakeholders, and other bodies for realizing the macro-level goals of *DPPD* (Ritchie and Crouch, 2003b). *DPPD* is always necessary for the establishment of the highly competitive destinations; without a proper plan and strategy a sustainable tourism development is doubtful. *DPPD* is comprised of several dimensions such as *system definition, philosophy/values, vision, positioning/branding, development, competitive/col-laborative analysis, monitoring and evaluation* and *audit*. Regarding Georgia, it is possible to briefly overview some of the dimensions of *DPPD* based on the Georgia Tourism Strategy 2015-2025 (Georgian National Tourism Administration, 2015a), while exploration of all of them requires the information that this research has a limited access to.

Development of the Georgia Tourism Strategy 2015-2025 was carried out by GNTA with the support of World Bank, key stakeholders and other individuals (Georgian National Tourism Administration, 2015a). In the 2000th Georgia was celebrating the quantity of the tourist rather than quality; it is worth to remark that in the current tourism strategy the country has changed its priorities from mass tourism to more sustainable way of travel meaning a creation of a world-class tourism offering and attracting high-spending travel markets (Georgian National Tourism Administration, 2015a).

As of the *vision*, for 2025 Georgia plans to become a leading destination employing its cultural and natural heritage, customer service and hospitality values (Georgian National Tourism Administration, 2015a). Some of the targets noted in the strategy will be analyzed to understand where the destination aims to be in 2025 and whether it has a potential to succeed. One of the specific targets for the year of 2025 is the increase of a TTCI ranking from 66th (year 2014) to 35th; unfortunately, in the six years' time (2014-2020) a ranking has dropped to 68th (Georgian National Tourism Administration, 2015a; Uppink Calderwood and Soshkin, 2019). It will be complicated but hopefully not impossible to upgrade Georgia's ranking to 35th in just five years. One

more target mentioned in the strategy is a raise in the number of international arrivals from 5 515 559 (2014) to 11 000 000 (2025) (Georgian National Tourism Administration, 2015a), in the Table 6 we can observe the yearly evolution of the number of international arrivals in Georgia. With Compound Annual Growth Rate (CAGR) from 2015 to 2019, it is possible to calculate expected number of international arrivals for 2025 with the following formulas:

$$CAGR_{2015 - 2019} = \left(\frac{\text{international arrivals 2019}}{\text{international arrivals 2015}} \right)^{1/4} - 1$$

$$CAGR_{2015 - 2019} = \left(\frac{9357964}{6305635} \right)^{\frac{1}{4}} - 1 = 0.104$$

$$\begin{aligned} \text{Forecasted international arrivals 2025} &= \\ &= \text{international arrivals 2019} \times (1 + CAGR_{2015 - 2019})^6 \end{aligned}$$

$$\begin{aligned} \text{Forecasted international arrivals 2025} &= \\ &= 9357964 \times (1 + 0.104)^6 = 16918435 \end{aligned}$$

Table 6. International arrivals to Georgia from 2015 to 2019

Year	Growth compared to previous year	Number of international arrivals
2015	+7.1%	6 305 635
2016	+6.6%	6 719 975
2017	+17.6%	7 902 509
2018	+9.8%	8 679 544
2019	+7.8%	9 357 964

Source: Georgian National Tourism Administration (2015b, 2016, 2017, 2018b, 2019b)

Even though, a forecast never guarantees the credibility of the future happenings, it is a good way to understand the possible scenario. If we do not consider the current curfews in the world caused by COVID-19 virus and if we assume that the growth rate of international arrivals will increase with the same rigor, a target set by the strategy has high chance to be reached. Expected international arrivals for 2025 would be 16 918 435. Another important goal to be discussed is the percentage of arrivals from neighboring countries being 88% in 2014 and targeted to decrease to 80% by 2025 (Georgian National Tourism Administration, 2015a). As it was already noted in the beginning, the neighboring markets are not the highest-spending travel segments, and this is the reason why GNTA aims to reduce the share of arrivals from the mentioned sources. Fortunately, in 2017 the arrivals from neighboring countries reduced to 78.5% (Georgian National Tourism Administration, 2018a) already fulfilling the target. The aim of expanding the tourism contribution to GDP from 6% in 2014 to 6.7% in 2025 was already achieved in 2017 (see the Figure 1) and it continues to escalate.

DPPD clearly is a sensitive part of the Ritchie and Crouch’s model which cannot be learned extensively in this paper; however the Georgia Tourism Strategy 2015-2025, that is a main tool of the DPPD, can be evaluated as a high-quality guidance for the developing destination with ambitious but

realistic goals; these targets are realizable in case of engagement of all the stakeholders and their hard work and tourism board aspiration or in other words a proper *destination management* process.

Destination management

Destination Management is a component of Ritchie and Crouch’s competitiveness model which consists of *organization, marketing, quality of service/experience, information/research, human resource development, finance and venture capital, visitor management, resource stewardship, and crisis management* (Ritchie and Crouch, 2003a). *Destination management* is a highly responsible task that can assist a tourism board to achieve its goals developed through DPPD. Georgia’s tourism sector is managed by GNTA; it involves tourism regional management services that are responsible for regional strategies, local tourism products and sometimes even tourism development planning at the regional level. In this constituent of the model, only two dimensions will be outlined with the same reason as in case of DPPD – the limited access to the information.

Marketing is a tool which assists a destination to establish a brand image and to attract the visitors. As Georgia Tourism Strategy 2015-2025 (Georgian National Tourism Administration, 2015a) communicates, marketing, branding and up-to-date communication are essential for attracting the highest-spending travel markets (Georgian National Tourism Administration, 2015a). Raising awareness can be done in different ways, however applying contemporary marketing tools should be in focus. It seems that GNTA’s marketing effort is successful based on the TTCI 2019 index called *effectiveness of marketing and branding to attract tourists*; Georgia rates higher (40th) than its competitors where Slovenia ranks – 56th, Slovak Republic – 112th, Moldova – 114th, Greece – 52nd, Romania – 103rd, Armenia – 82nd, Hungary – 65th; Georgia only lags behind Croatia – 30th (World Economic Forum, 2019a).

Service, which is an element of *destination management* refers to the total quality of the traveler’s experience (Crouch and Ritchie, 1999). As tourists have primary contact with guides, hospitality staff, and other service providers, it is a must to provide the destination with trained human resources. One example of the primary contacts which are not always well-trained in Georgia is the guides. Guides in Georgia are not required to have a license for practicing this profession. There is an organization that trains and gives certifications to professional guides, but many independent individuals work without the certification. It can affect the total quality of tourist experience if the guides or other services do not manage to provide a high-quality experience.

Qualifying and amplifying determinants

Finally come the *qualifying and amplifying determinants* which incorporate *location, safety/security, cost/value, interdependencies, awareness/image and carrying capacity* (Ritchie and Crouch, 2003a). As Ritchie and Crouch note, *qualifying and amplifying determinants*’ “...effects on the

competitiveness of a tourist destination are to define its scale, limit or potential.” (Ritchie and Crouch, 2003a:75).

One of the most important from the above-mentioned determinants is *safety/security* (Crouch and Ritchie, 1999). Even though Georgia as a travel destination is generally safe and travelers can, for example, enjoy night-walk, sometimes safety is not guaranteed. Some companies which work in touristic locations do not keep safety precautions. For instance, in the winter of 2019, one of the ski-lifts in a ski resort of Georgia went out of order while visitors were in it (Mezzofiore, 2018). Several people were injured; nobody had a severe injury but the video of cabin car spinning and throwing out people from the high altitude went viral on social media and it did not have a positive result. In the era of highly developed network communications, even a small “mistake” can cost a lot for the tourism destination. It is very complicated for the destination managers to control all the stakeholders serving the visitors; however, they can have some influence on regulations which can finally guarantee the safety. Georgia ranks 25th in the *safety and security* component of TTCI 2019 which is a great achievement for a developing country (Uppink Calderwood and Soshkin, 2019). Emerging wine destinations as well as other leading wine producing countries rank lower: Armenia – 40th, Slovak Republic – 57th, Greece – 61st, Romania – 29th, Hungary – 39th, Croatia – 35th, Moldova – 67th (Uppink Calderwood and Soshkin, 2019).

Even though Georgia does not share its border with none of the highest-spending travel markets of the world, the *location* occupied by the country is still satisfactory considering the new direct flights emerging from the target source markets such as the flights from European cities to Georgia managed by Wizz Air Hungary Ltd. and Ryanair DAC. As noted by Ritchie and Crouch “Normally, although not necessarily, accessibility improves the closer the destination is to its markets.” (2003c:235).

Georgia occupies 36th place in the *price competitiveness* pillar of the TTCI which is founded on four indicators: *ticket taxes and airport charges, purchasing power parity, fuel price level, and the hotel price index* (World Economic Forum, 2019c). Having high ranking does not directly mean that it is competitive in terms of *cost/value* dimension of the Ritchie and Crouch model. It is essential to know the real value of the product what travelers purchase when they visit Georgia. Unfortunately, the *cost/value* component for Georgia cannot be studied deeply in this research, however, as the price frequently is a key factor in the travel decision making, with 36th place in *price competitiveness* indicator, Georgia is in a good position overtaking all the competitors except Moldova (16th) and Armenia (30th) (Uppink Calderwood and Soshkin, 2019).

The component of *interdependencies* refers to some kind of relationship between destinations, being it competitive or collaborative. Also, occurrences and a competitiveness of one country might affect its neighbors. For instance, a 2008 war in Georgia might have impacted the number of international arrivals to Armenia too. Moreover, travelers

often visit both countries together which means that high competitiveness of one destination might be a support for another. There are clear *interdependencies* between neighboring countries like Georgia and Armenia, and in terms of wine tourism a collaborative relationship would very likely favor both.

Awareness/image is a key to the destination competitiveness. If wine tourists do not perceive a country as a delightful wine tourism spot, they will not travel to that destination. Therefore, tourism boards position countries as attractively as possible. GNTA as well tries to position Georgia as a world class wine tourism destination based on the published articles about the country in international sources like The New York Times, The Guardian, National Geographic and so forth (Georgian National Tourism Administration, no date). Georgia’s image in the view of tourists has not been yet researched, however, it would be crucial to study this topic to measure the results of the positioning efforts. Measuring image would help the interested parties understand tourists’ holistic impressions of the destination which can be used in future positioning of the country.

Results and discussions

To summarize, Georgia as a wine tourism destination has considerable endowments to be competitive. Its history, culture, traditions, hospitality, physiography, and other qualities are inherited resources that can attract more high-spending visitors and finally increase its competitiveness and contribute to a better standard of living for the community. GNTA makes massive efforts to position Georgia as an excellent and remarkable wine tourism destination which so far has positive outcomes.

On the other hand, there are some issues and threats that must be tackled by destination managers for long-term success. Some of the weak points of Georgia overviewed in the research incorporate lack of scientific research and quality infrastructure, low-skilled human resources, transportation quality and options, and safety. Also, tourism source markets need to be better diversified and switched to high-spending segments. To conclude, in order to upgrade its ranking on TTCI and become more competitive, Georgia must improve even those factors in which it surpasses the rivals; in this way the country has potential to reach the level of world class wine tourism destinations. Based on this paper, it is strongly recommended to learn the topic of the competitiveness of Georgian wine tourism destination deeper and with more empirical methods.

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