



TOURISTS SURVEY IN AJARA

Developed under the framework of the Project:
Economic Development of Ajara Autonomous
Republic, Trade Facilitation Phase which is financed by
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1. Introduction

The following document is the analytical report of tourists' survey in Ajara prepared by "ACT Research" for UNDP (United Nations Development Program).

The survey identified existing needs/problems in the tourism sector which will assist the tourism agency to prepare appropriate and adequate tourism development policy.

The core objective of the project was to identify existing problems of tourism in Ajara and to elaborate corresponding recommendations for the tourism and resorts department of Ajara, Ajara tourism agency and for other relevant institutions.

Below the survey design and results are presented in the corresponding sections

2. Survey design

In order to meet the survey objectives, the most optimal approach was considered to be applying two methods.

The survey uses quantitative as well as qualitative research methods.

Within the framework of the quantitative research in-depth interviews were conducted with individuals who are directly engaged in tourism sector development policy process.

Within the framework of the project quantitative component was carried out – interviews were conducted with local as well as with foreign tourists at the seaside resorts of Ajara.

Each component of the survey is described in the corresponding chapters provided below. Technical details of the project are discussed in the report appendix (see technical report).

Below in the corresponding sections the survey design and results are presented.

2.1 Qualitative research aim and objectives

The main objective of the qualitative component was the evaluation of tourism tendencies and potential in Ajara by the individuals who are directly engaged in tourism sector development policy process.

Based on the survey aims particular objectives were established:

- ✓ Evaluation of existing environment in tourism sector
- ✓ Identification of information sources
- ✓ Views about future and preferences

2.2 Research methodology

During the survey of tourism tendencies and potential evaluation in Ajara, the methodology of thorough interviews was carried out in order to get the insight of the survey issues.

Five in-depth interviews were conducted with the representatives of tourism and resorts department of Ajara, tourist agencies and with other individuals who are directly engaged in tourism development process.

The duration of interviews was approximately 30 minutes. Field works were performed during the period of 15 to 20 September 2011.

2.2 Qualitative research aim and objectives

The main aim of the given component of the survey was the identification of existing problems in the tourism sector and elaboration corresponding recommendations. Particular survey objectives were the following:

- ✓ Establishment of tourists' socio-economic profile
- ✓ Identification of general preferences of choosing holiday locations and information sources about the touristic places
- ✓ Measuring tourists' satisfaction level
- ✓ Determining future plans and intentions in relation to Ajara

Duration of the interviews was approximately 15-20 minutes.

2.3 Survey methodology

The survey was performed using qualitative research method. Within the framework of the survey, interviews were conducted using face to face interview techniques with the tourists who were visiting resorts of Ajara during the period of survey implementation.

The method of the survey was the stratification systematic sampling. Public places were taken as a stratification variable. The final unit of the sampling was local and international tourists. Weighting of the obtained data was performed based on the information on the tourists' distribution in Ajara in order to generalize the survey results.

3. Executive Summery

As a qualitative research showed tourism development process is very active, it's reflecting on tourists flow as well as foreign investments. It should be noted that domestic tourists are mainly attracted by the sea, while foreign tourists are interested in Eco-tourism (high mountain regions) in Ajara. Accordingly there is very active work in the field of tourism to develop different directions, because region must be attractive for tourists at any season of the year.

According to quantitative survey, in September mostly women visited Ajara, as for the age groups, among the international tourists aged 25-34 years visited Ajara mostly and among the domestic tourists approximately equal distribution of visitors were 18-24 years old (28 %) and 24-35 years old (24%).

According to marital status Ajara is equally interesting to both married and unmarried people. Among the outside tourists 54 % are married and among the domestic tourists 47 % are unmarried.

More than half of the visitors (65%) are employed. According to the field of occupation Ajara is visited only by 1, 8 % employers (businessman) as well as small proportion are presented with self-employed and pensioners.

71.6% of tourists – are mostly attracted with sightseeing/nature and visiting landscapes, 51.4% of visitors to any of the entertainment and walking in recreation places.

Tourists are mostly visiting Ajara with family members and friends. Tourist groups mainly consist of 4 people. Only 12% of tourists traveled alone this time.

As for the accommodation ways, tourists are mostly selecting family-type hotels and relative/ friend's house (where they don't pay any fee).

Most of the tourists mostly get the information about the resorts and Ajara from friends.

Most of the tourists pay big attention to the sea factor and equally important for them is safety and affordable price.

Most of the visitors prefer family-type hotels, what is presumably caused by family type hotels affordable price. The second type of the selected hotel by tourists – average price hotel – clearly indicates accessible price influence when selecting the hotels.

Half of the tourists like Ajara and that's the reason of their visit in Ajara, and certain group of visitors decided to visit Ajara because their friends suggested them.

Most of the tourists think that Ajara met their expectations this year, so most part of visitors are completely satisfied with the visit in Ajara.

Group of visitors, who are not satisfied with Ajara among the reasons are naming noises caused by reconstruction and means of transportation/transport.

There is quite high probability of returning in future to Ajara by tourists, and among the main reasons why tourists are going to visit Ajara again are sympathy to nature of Ajara and tradition to spend a vacation in Ajara.

Among the visitors who aren't going to come back in future, most popular factors are that they always choose different places to spend their holidays, and it's equally popular high prices and low quality service.

Most of tourists would definitely recommend to their friend/relative to visit Ajara.

4. Survey results

4.1 Qualitative research results

4.1.1. Evaluation of existing touristic environment in Ajara

The qualitative research reveals that there is a dynamic tourism development processes in Ajara. As respondents believe, compared to the past, recently tourism has reached its high development stages. This has a positive effect on the number of tourists as well as on the infrastructure development in Ajara. Respondents state, that tourism development is the key priority of Ajara and accordingly, there are radical changes in this direction:

- ❖ Existence of several high-class hotels
- ❖ Improvement of infrastructure of Batumi
 - ✓ Boulevard enlargement and renovation
 - ✓ Renovation of old buildings and cultural establishments
 - ✓ Construction of new buildings and cultural objects
 - ✓ Updating underground communications – water, sewerage, gas, electricity, internet
- ❖ Increase of entertainment places
- ❖ Availability of differentiated touristic services (cheap and expensive)

It is worth noting, that in order to attract tourists in Ajara, marketing strategies and accents were targeted to the following countries: Turkey, Ukraine, Iran, Armenia, Azerbaijan, and Poland. Accordingly, there are direct charter flights from the above listed countries to Batumi. In addition, the branches of tourist agencies of above listed countries has been actively launching in the city, which increases number of tourists in the Ajara region.

“Ajara and Georgia are quite popular in our neighbor countries. We have selected particular countries, from where we expect tourists to come... We participate in

international touristic exhibitions in effort to popularize Ajara as a touristic region and touristic brand. In addition, we provide tourist agencies with the information and thus, the number of packages sold and number of attracted tourist in our region depends on their work.”

[Head of marketing and advertizing division of culture and resorts department of Ajara]

Based on the qualitative research results, it can be concluded, that for the local tourists Ajara is attractive because the opportunity of resting at the seaside and in addition due to the infrastructure of Batumi (novelty sights), which is developing quite sharply. As for the international tourists, they are mostly interested with ecotourism (visiting highlands of Ajara, sights of cultural heritages). It is considerable, that according to respondents, Batumi has more experience and traditions in touristic services (mainly marine tourism). However, as respondents note, works are in progress in order to improve service in other areas, as development of highland Ajara is an important priority. For the nearest future development of mountain skiing is planned, which will enable Ajara to become attractive for tourists in each season of year.

“In Ajara region, most successful from the tourism development point of view is of course Batumi as there are concentrated various touristic services and a visitor from any country can find desired touristic product.”

[Head of department of tourism and resorts of Ajara]

Participants of the qualitative research describe Batumi as the touristic center of west of Georgia which is on the one hand due to its suitable geographical location (close to Turkey border, availability of all types of transportations) and on the other hand due to its marine and mountain tourism resources.

According to the survey participants, Ajara has some advantages over the neighbor countries in seaside tourism. In particular, the Black Sea coast is less developed in Turkey and therefore, tourists who are willing to enjoy the Black Sea coast can spend their holidays in Ajara in safe environment and get high quality service.

“Ajara highland regions have advantages since they are located near Batumi city, international airport and border, individuals who stay in Batumi for few days have the opportunity to enjoy divers climate environment and get entirely different product at Ajara highlands. This is its advantage over other regions of Georgia.”

[Head of department of tourism and resorts of Ajara]

“If we compare our region to for example, Turkey, you are aware that in Turkey, the Black Sea coast is less developed than Mediterranean Sea coast or other countries at the Black sea coast. Georgia, in particular, Ajara is distinguished by its well secured and safe environment.”

[Deputy Head of department of tourism and resorts of Ajara]

The qualitative research finds that tourists are particularly interested and fascinated by Georgian culture, hospitality and Georgian cuisine. As respondents note, all above mentioned are often the reason of the repeated visits.

According to the results of qualitative component of the survey, among the motives of repeated visits might be the hospitality/friendly environment, also the nature of Ajara (mostly for international tourists) and renovated architecture.

The qualitative research revealed various sources of information used for planing visit to Ajara:

- ❖ Internet
- ❖ Media (commercials, reportages)
- ❖ Friends or relatives advise/shared experience
- ❖ Personal experience

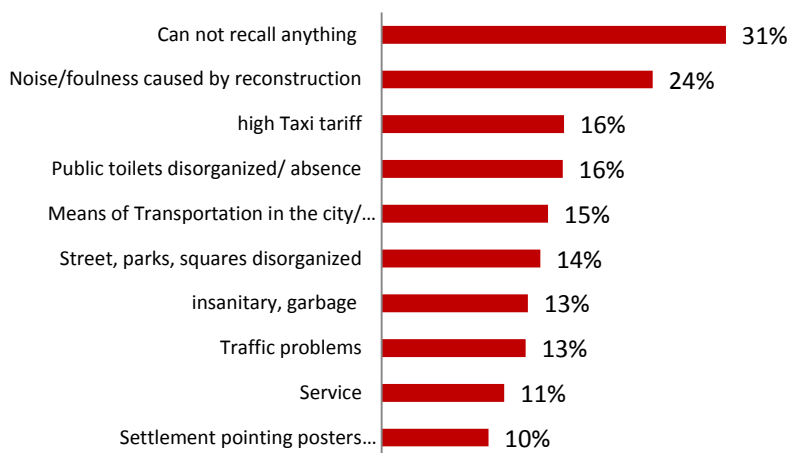
As the qualitative research show, tourists obtain information about Ajara mainly from their friends. Among the other sources are personal experience and internet. Few tourists named radio/TV and tourist agencies as an information sources about Ajara.

Qualitative research revealed existing particular flaws in tourism sector which are on their early stage of development and require improvements:

- ❖ Low quality service – respondents consider it as the most problematic issue, however, they note that works are in progress in this direction (staff trainings in the touristic organization, invitation of international experts and consideration of their recommendations).

According to the quantitative research, 11% of visitors consider low quality service as a flaw of Ajara tourism. In addition, some of the tourists who do not plan to visit Ajara in the future stated the low quality service as a reason.

***Could you please tell me, what caused your dissatisfaction while visiting Ajara?
(Overall picture)***



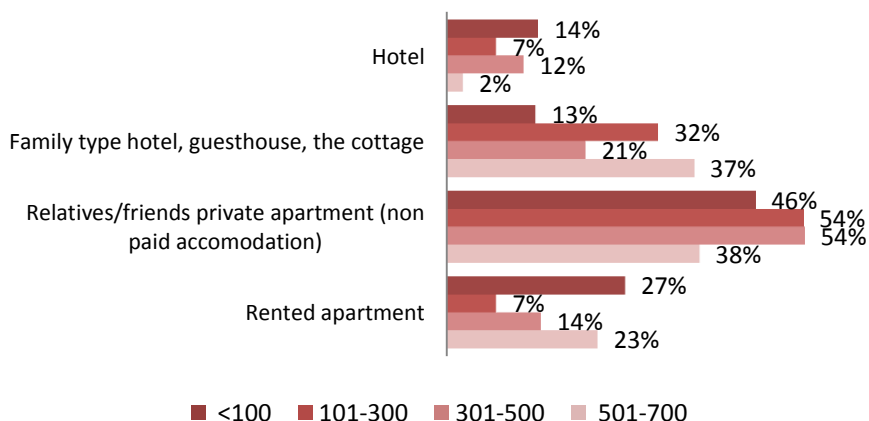
- ❖ Insufficient infrastructure, which causes prices to rise during the season.

Only a tiny share of tourists complained about the infrastructure (approximately 0, 7%).

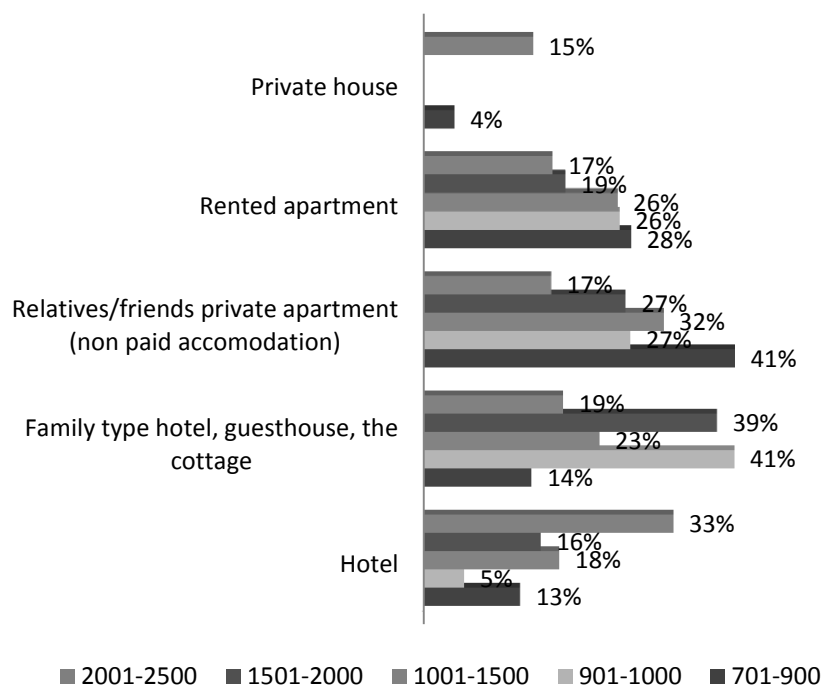
- ❖ Low amount of cheap (2-3 stars) hotels – qualitative research finds, that mainly high-class hotels are constructed in Ajara region, but largest share of the visitors belong to average social class and often complain about the low number of average class hotels.

The quantitative research has shown that most of the tourists in Ajara prefer family type guesthouses and average price hotels. Some portion of tourists chooses family type guesthouses, while others stay at friends/relatives private apartments (non paid accommodations). Only 20% of tourists stay at hotels and most of them are international visitors.

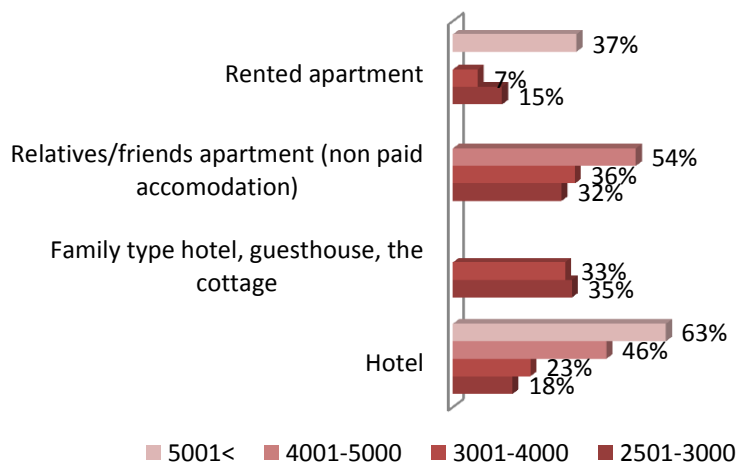
***Can you please tell me where have you spent night during your current stay in Ajara?
(Family income category only for domestic tourists – income below 100 up to 700)***



Can you please tell me where have you spent night during your current stay in Ajara?
(Family income category only for domestic tourists – income from 701 below 2500)



Can you please tell me where have you spent night during your current stay in Ajara?
(Family income category only for domestic tourists – income from 3000 over 5007 or more)



- ❖ Developing infrastructure – according to respondents, continuous construction works cause annoyances and tourists often complain about it.

According to the quantitative research data, tourists are dissatisfied with noise of repair works and pollution.

Besides the above mentioned, tourists are dissatisfied with unavailability/annoyances related to public toilets and public transport or other problems related to transportation. Among the issues are listed untidy parks and squares. Nevertheless, some tourists state that they are pleased with tidy parks and squares of Batumi.

Based on the results of qualitative research, it can be stated that in the recent period important investments were made in tourism sector in Ajara. In particular, as respondents state largest investments were made in high class hotel constructions. According to participant of the qualitative research, the investment flow is the consequent on the one hand of the geopolitical safety of Ajara and entire country and on the other hand significant benefits for foreign investors provided by the government.

“As regards to tourism, mainly these are investments made in hotels, large investments, which attracted such famous hotel brands as “Sheraton”, “Hilton”, “Radisson”, etc.”

[Deputy Head of department of tourism and resorts of Ajara]

“Reforms made by the government attract investors, for example taxies, investors do not have to pay various taxes and benefit concessions related to number of processes”

[Head organizational division of tourist agency of Batumi]

“Infrastructure is developing, though we might talk about infrastructure, in terms of variety of choices in different recreation sectors, various types of hotels, restaurants, cafes, night clubs, galleries, etc.”

[Deputy Head of department of tourism and resorts of Ajara]

4.1.2 Preferences and views about future

Qualitative research finds that Ajara has great potential in tourism sector in various directions:

- ❖ Marine tourism
- ❖ Mountain skiing tourism
- ❖ Eco and rural tourism
- ❖ Adventure tourism
- ❖ Cruise tourism
- ❖ MICE tourism

As respondents state, development of above mentioned fields are considered as very important priorities, which, as they believe, will encourage investment flow and thus, will create more employment places in the region.

“There is a potential of cruise tourism development in Ajara, we are actively working in this direction, to increase number of cruise boats in Ajara, as this is a very economically interesting direction... Tourists would come with the cruise boats, spend large amount of money where they enter, this would have a notable positive effect on the city.”

[Deputy Head of department of tourism and resorts of Ajara]

The qualitative research reveals that the following stages are planned to be implemented for tourism development in various directions:

- ❖ Creation of large educational institutions – respondents believe that this will encourage growth of number of qualified labor in Ajara.
- ❖ Creation of laws related to standards for hotels and restaurants – respondents believe that this will enable government to control organizations providing touristic services in order to satisfy international standards of service.
- ❖ Creation of high class as well as cheap recreation facilities in Ajara
- ❖ Attraction of international airline companies in Ajara

It is worth noting that as respondents believe, Ajara has sufficient resources to conduct above mentioned stages, though as they add, there are some obstacles, such as lack of qualified labor and unavailability of cheap means of transportation.

Three particular directions which I would list are: development of highland places of Ajara, development of cruise in Ajara and we could consider Batumi as a conference, meeting, exhibition center, etc.”

[Deputy Head of department of tourism and resorts of Ajara]

Unfortunately we do not have an airline network at the local airport, however, from 2012 we plan to cooperate with several airline companies, people should have an opportunity to travel to Ajara at as low costs as possible.”

[Representative of culture department of Ajara]

As a conclusion, it should be noted that tourism development process in Ajara is in its active phase. This has a positive effect on amount of tourists as well as investment flow in the region. It is considerable, that local are attracted mainly by the sea, while international tourists are interested in ecotourism (highlands of Ajara). Hence, there are active working processes on development of tourism in various directions in order to make the region attractive for visitors at any season of a year.

4.2 Quantitative survey results

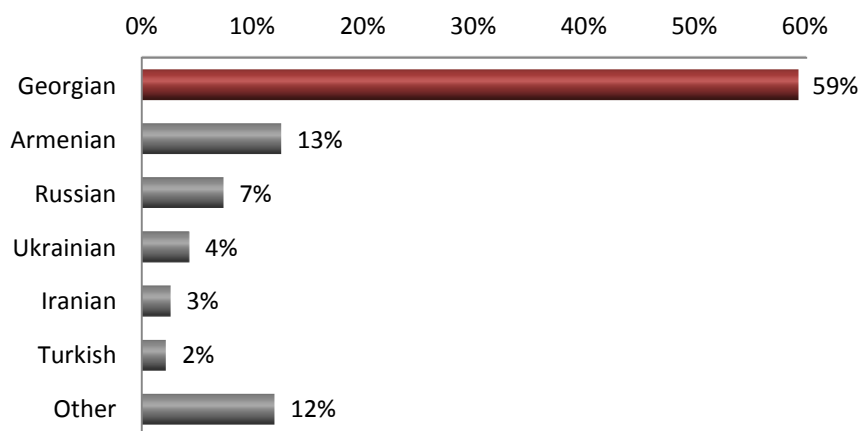
4.2.1. Tourists' socio-economic profile

As mentioned above, the quantitative research was conducted in September 2011. Participants of the survey were tourists staying at resorts of Ajara at the moment of the survey. In order to generalize obtained results, data weighted was implemented. Below is provided the interpretation of obtained data in different aspects.

Due to the high number of non responses, analysis of tourists' income was not considered to be reasonable.

Holidaymakers were assigned as a local or an international tourist according to their citizenship/permanent residence. In this distribution, few ethnic Georgians who has being living outside of the country for several years were treated as international tourists. Therefore, it is reasonable to label them as international tourists, while residents of Georgia (except residents of Ajara) will be labeled as local tourists.

In September 2011, Ajara was visited by ethnic Georgians as well as by foreigners. 59% of the tourists are ethnic Georgians, while others belong to Armenian, Russian, Ukrainian and ethnicity.



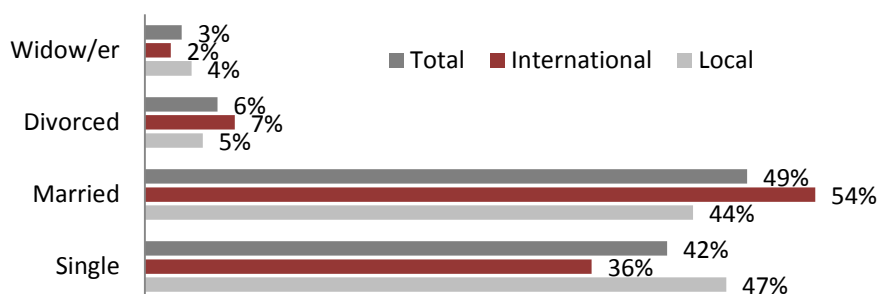
Majority of tourists in Ajara during September 2011 were women – 66% of visitors were female. The gender distribution in local and international tourists is the following – 74% of local tourists and 57% of international visitors were woman.

As regards to the age groups, majority of international tourists fall in 25-34 years old age group, while approximately the same share of local tourists aged between 18-24 (28%) and 24-35 (24%) years visited Ajara.

Among the visitors, women in 24-35 age group (21%) are significantly more than man in the same age group (11%).

According to the social status, Ajara is equally interesting for married and “not married” persons. 54% of international tourists are married while 47,1% are not.

Respondents Marital Status



More than a half of the visitors are employed (65%). Only 1,8% of the tourists are employers (businessman). Also the share of self-employed and pensioners is small among the visitors of Ajara.

A tiny portion of the tourists (1%) choose Ajara for medical treatment or recovery. Absolute majority of respondents came to Ajara with holiday and recreation purposes (99%).

4.2.2 Current visit to Ajara and information sources

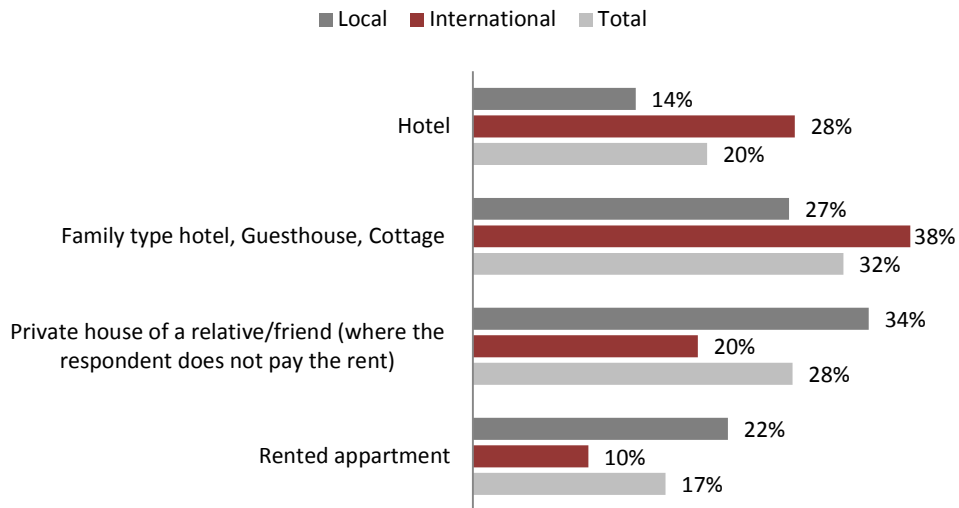
71,6% of the tourists are attracted mostly by sights/nature and landscape of Ajara, while 51,4% of visitors are interested in any recreation or entertainment places.

According to the survey, average number of visits for local tourists is 10, while the same indicator for international tourists is 3.

Tourists in Ajara were mostly coming with their family members (35%) or friends (37%). Tourist groups consist by on average 4 persons. Only 12% of visitors traveled alone last time.

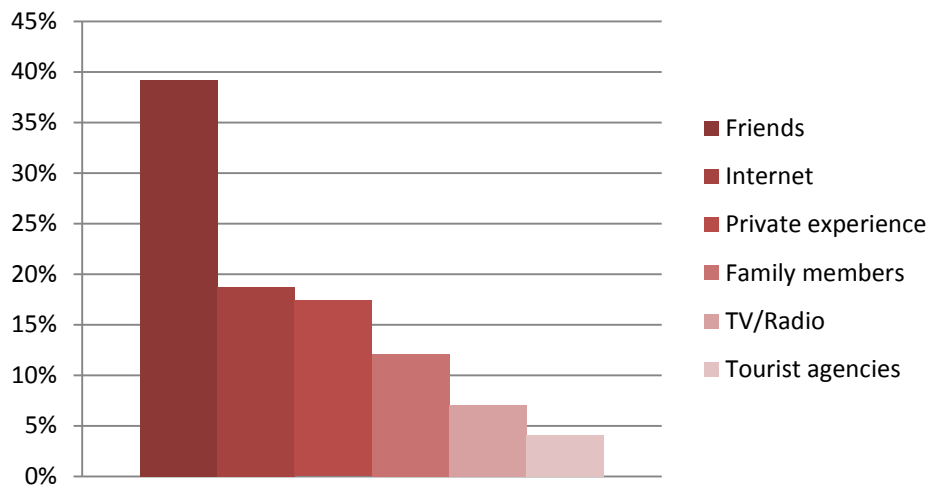
As regards to the accommodation types, tourists mainly prefer to stay at family type guesthouses or relatives'/friend's apartment (non-paid accommodations).

*Please tell me where did you stay for a night during the current visit to Ajara?
(Local/international tourist, general picture)*



Majority of tourists obtain information about recreation places from friends. For visitors of Ajara, the main information source on the region is the same. In addition, most tourist consider this source of information as a priority source, regardless of whether they are gathering information on Ajara in particular or on recreation places in general.

Priority information source of Ajara



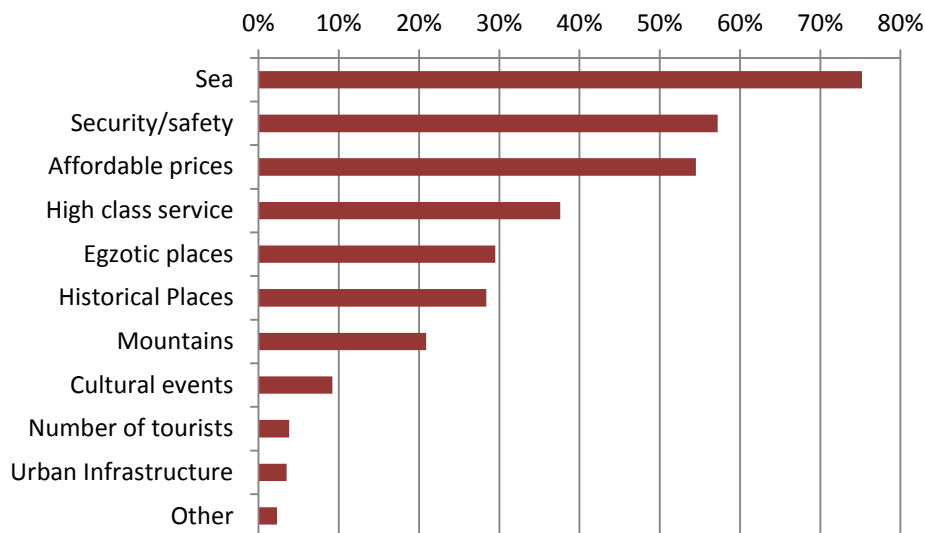
Majority of tourists have never visited web-site of Ajara tourism. Those tourists who visited the web-site found it more or less useful.

4.2.3 General preferences on recreation places

For the majority of the respondents the main criterion of choosing recreation place was sea coast, while safety and affordable prices are equally important.

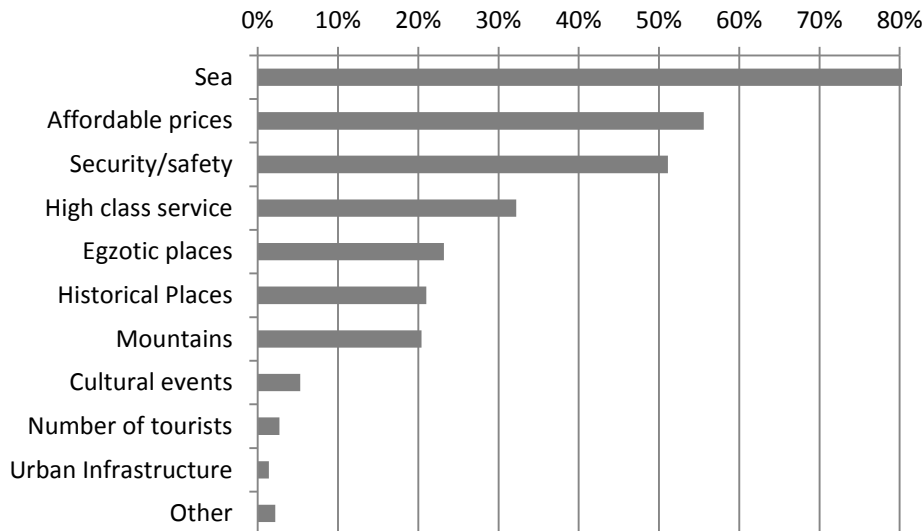
Generally, which are the criteria of choosing location for a holiday?

(General picture)



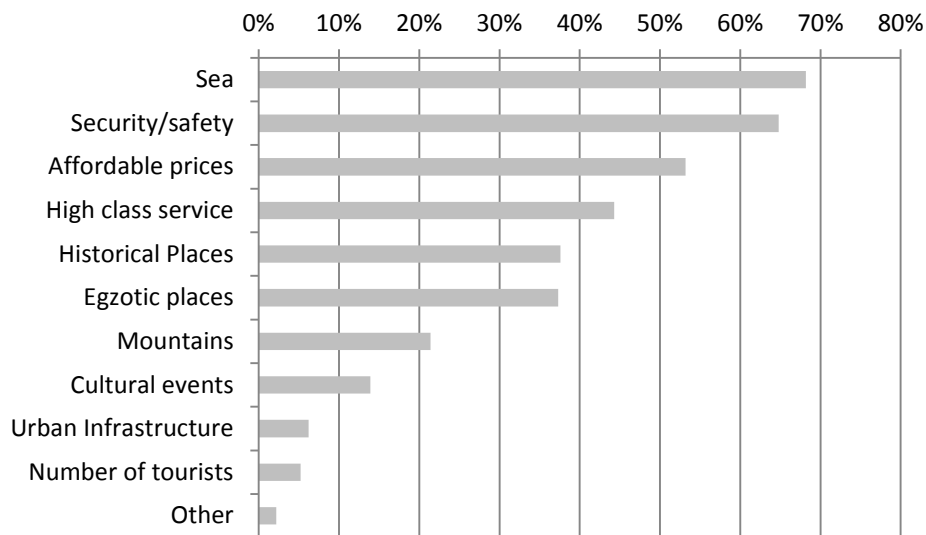
Generally, which are the criteria of choosing location for a holiday?

(Local tourists)



Generally, which are the criteria of choosing location for a holiday?

(International tourists)

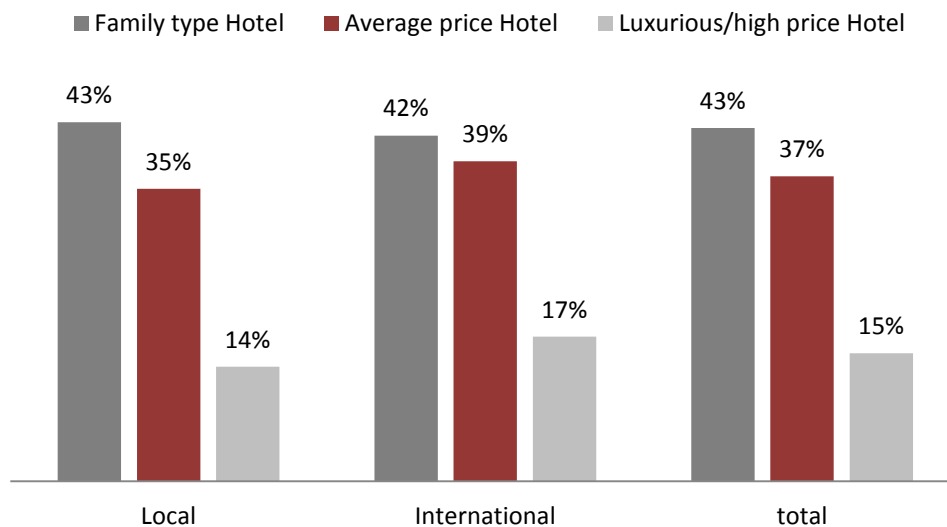


The picture is similar when tourists choose priority criteria for recreation locations – sea, safety and affordable prices are their main preferences.

Majority of visitors prefer family type guesthouses, which is probably because of its affordable prices. Second most utilized type of accommodation is average price hotels, which directly indicates that choices are influenced by the price.

Please tell us, which type of hotel do you prefer?

(Local/international tourists and general picture)

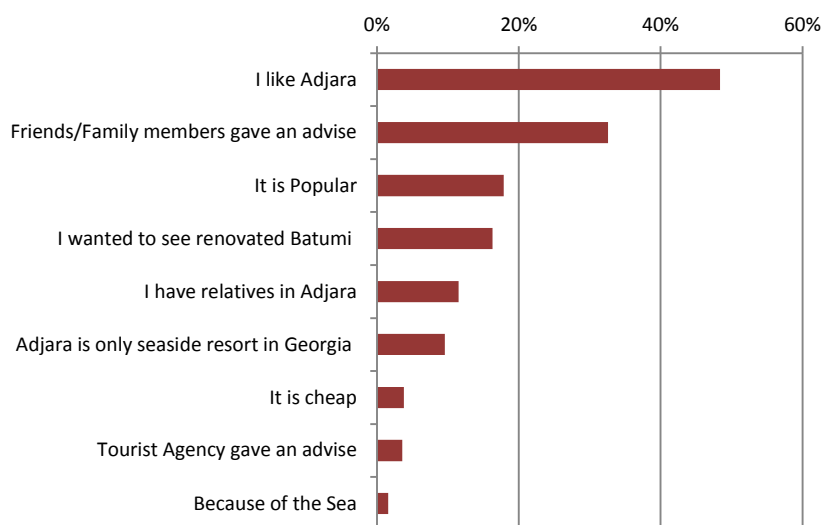


4.2.4 Impressions on Ajara

Almost a half of the tourists (48%) state that they decided to visit Ajara because they like the region, while 32% made their choice based on friends suggestions.

Please tell us why did you decided to visit Ajara?

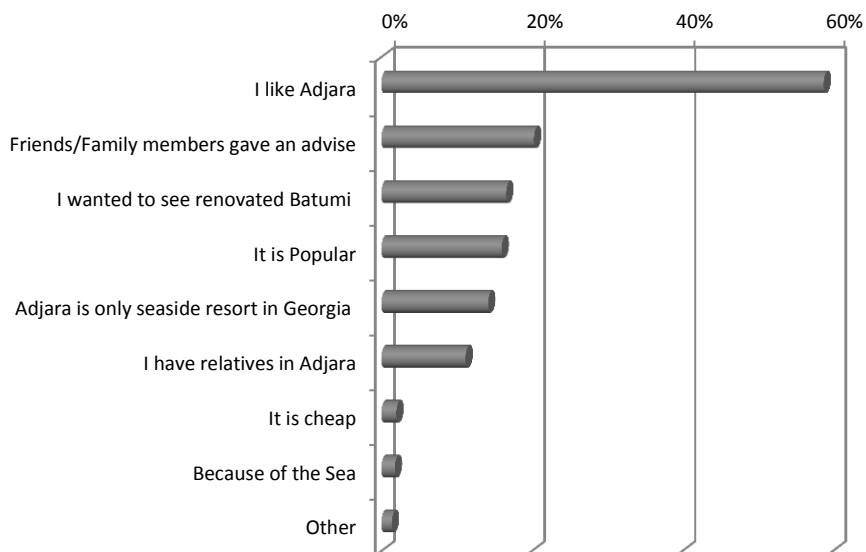
(General picture)



For local tourists main reason of choosing Ajara for their holidays is the sympathies towards the region (I like Ajara – 59%). For local tourists friends'/relatives' advice is also important. They are also interested in renovation processes in the region (I wanted to see renovated Batumi – 16%), while others decided to visit Ajara because its popularity in Georgia.

Please tell us, why did you decide to visit Ajara?

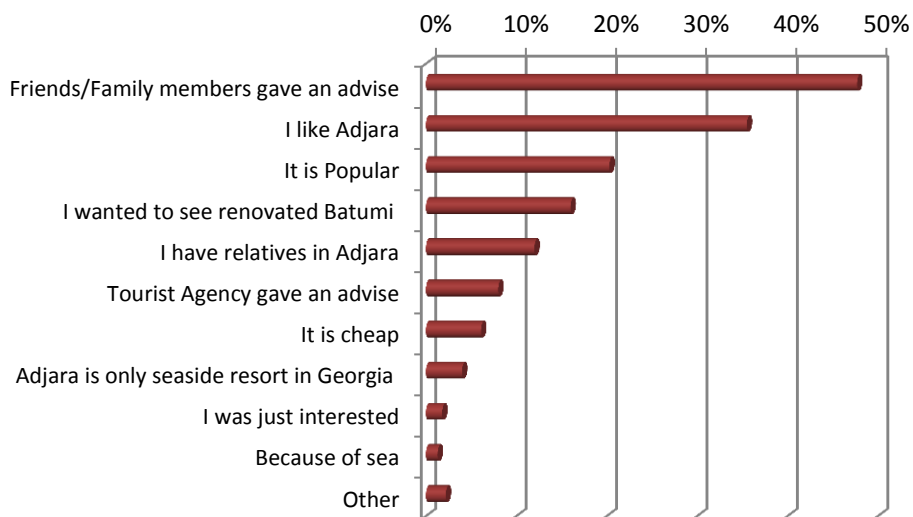
(Local tourists)



On the chart above we can notice that for local tourists friends'/family members' advice play an important role in decisions making process. Only 8% of them made the choice based on a tourist agency advice.

Please tell us, why did you decide to visit Ajara?

(International tourists)



On the question, whether Ajara met their expectations, majority of respondents gave a positive answer. 68% of visitors state that Ajara fully met their expectations. Tourists mainly positively respond on this question and the average answer is "Fully met my expectations".

The situation is similar when respondents evaluate their satisfaction. Majority of tourists are fully satisfied with the visit to Ajara. The satisfaction level is quite high and the average answer is “fully satisfied”.

As regards to the usage of various services, large majority of the respondents, as expected, use beach (80%), restaurant, cafe-bar and supermarket/market. Tourists were asked to evaluate each service using 5 grade scale where 1 means very poor and 5 means - very good, the results show that tourists evaluate the used services mostly as good.

	Has used	Evaluation on 5 grade scale
Beach	80%	4.1
Cafe-bar	70%	4.2
Restaurant	53%	4.2
Supermarket/market	46%	4.2
Hotel	39%	4.2
Clothes/accessory shops	20%	4.2
Local internal transport	38%	3.5
City infrastructure	18%	3.5
Night club	15%	4.4
Attractions	15%	4.6
Museums	11%	4.7
Batumi Velo	9%	4.7
Swimming pool	5%	4.7
Casino	3%	4.6
Guide service	1%	4.7
Tennis courts	1%	4.6
Dolphinarium	0.4%	4.5

Seaside is equally popular among the local and international tourists. However, usage of restaurants and café-bars is different. It appears that local tourists visit restaurants less frequently. Besides, small share of local visitors stay at hotels, while 51% of international tourists prefer to book hotels.

In case of usage any services, visitors were asked to evaluate them by 5 point scale system. They mainly describe used services as “good” or “very good”. As an example, beach was considered to be “very good” by 45% of tourists.

Tourists evaluated following facilities by several criteria:

- ❖ Hotels
- ❖ Restaurants

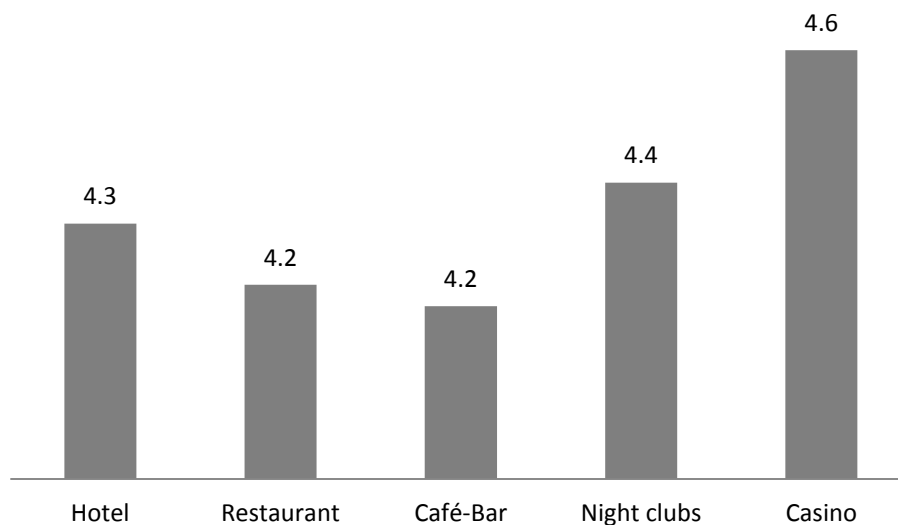
- ❖ Café-bars
- ❖ Night club
- ❖ Casino

The respondents who used any above listed services were asked to evaluate the services by 5 point grading system, where 5 stands for “very good” and 1 stands for “very bad”:

- ❖ Interior
- ❖ Furniture
- ❖ Food
- ❖ Staff
- ❖ Cleanness
- ❖ Service
- ❖ Comfort

It was found, that majority of tourists who stayed at hotels were satisfied by above listed criteria. The evaluation of each criterion is quite high, between 4 and 5 (4 – good; 5 – very good).

The evaluation results are similar for the other services as well. In general, visitors seem to be satisfied by the above listed parameters – satisfaction indicators are fairly high for all the criteria.

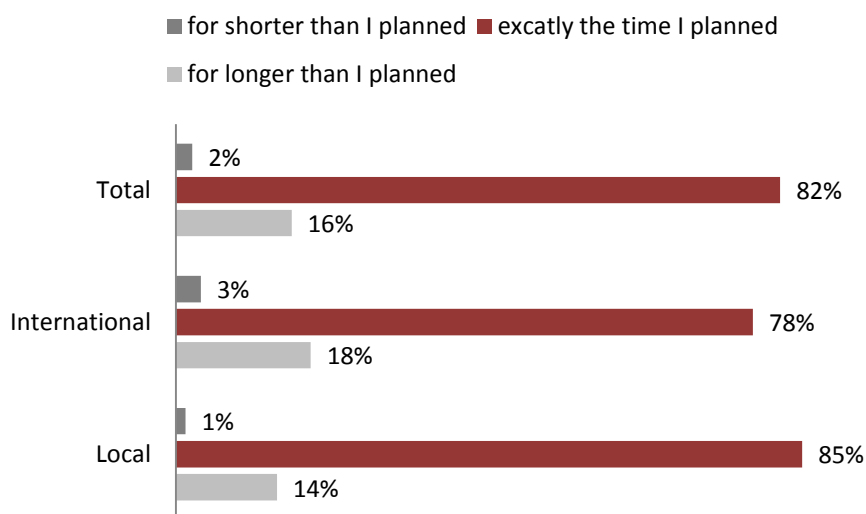


4.2.5 Future plans

Most frequent answer on the question about the planned duration of stay was one to two days.

Please tell us whether you have stayed in Ajara for longer than planned or did you stay exactly the same period as intended?

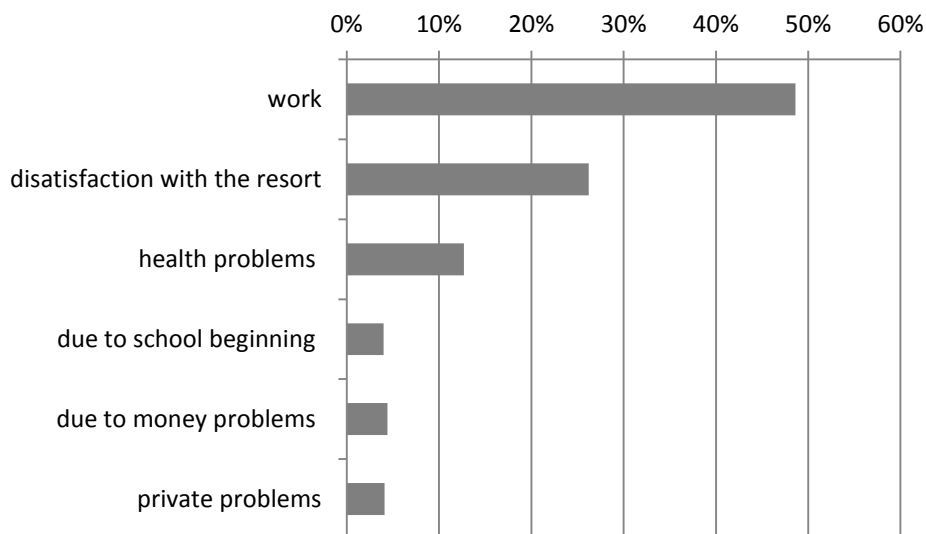
(Local/international tourists, general picture)



The chart above does not suggest tourists' premature departure. Most of the tourists stayed in the territory of Ajara for the planned period. Only small share (2%) of tourists left the region prematurely, mostly due to the issues related to their work.

What is the reason of your premature leave?

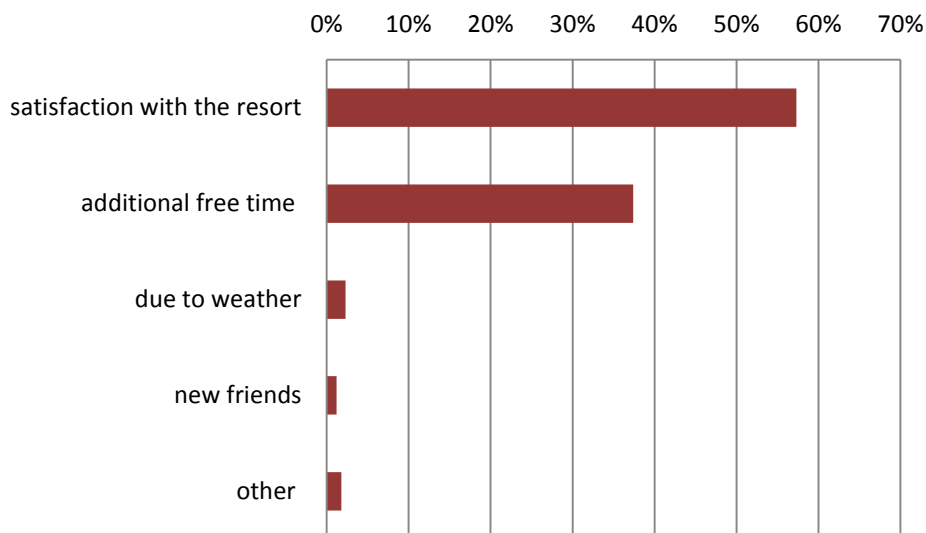
(General picture)



16% of the holiday-makers stayed in Ajara for longer than intended. Satisfaction with the resort was named as a motive of extended duration of visit in most of the cases.

What is the reason of the extension of your stay?

(General picture)



As regards to satisfaction of the visitors, tourists are mostly pleased by the weather, renovated architecture, food and Georgian cuisine. It is worth noting, that 49% of the tourists are satisfied by Georgian dishes.

30% of the tourists cannot remember reasons of dissatisfaction. Rest of the visitors who named some annoyances complained about the repair work noise and transportation. The latter was

problematic for 20% of international and 10% of local tourists. The issue of uncomfortable/unavailability of public toilets still remains problematic.

Probability of repeated/future visit to Ajara is positively evaluated by tourists and hence, this indicator is fairly high. Majority of tourists (77%) state that they will definitely return to Ajara.

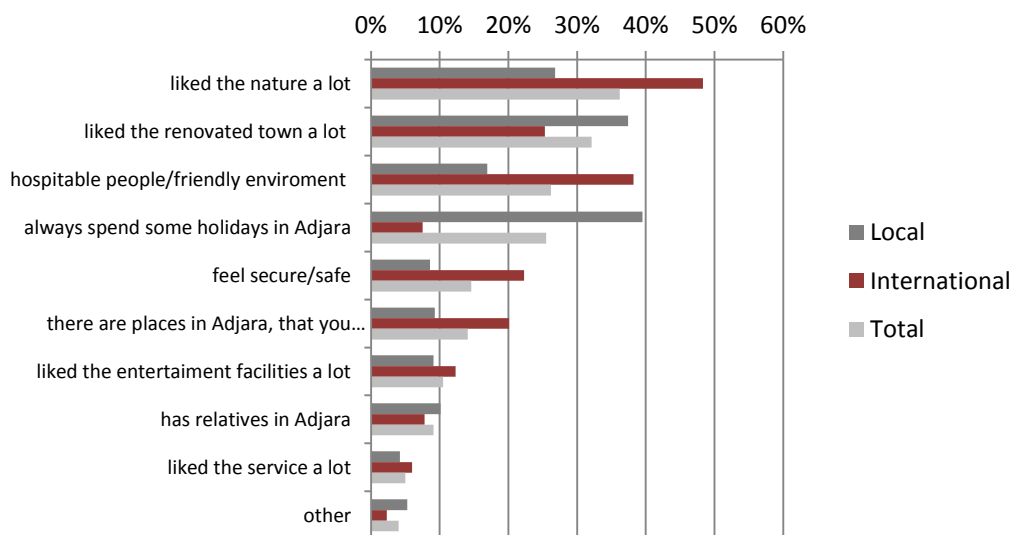
Among the main reasons of intended future visit, tourist named sympathies towards the nature of Ajara (36%). Comparative analysis of this indicator for local and international tourists gives an interesting result. Only 29% of local tourists are pleased by the nature, while 48% of international visitors stated that they will come back because they enjoyed the nature of the region.

One of the listed reasons was “I always spend holidays in Ajara” (26%), which is not surprising, because 40% local tourists stated that they will return since they always spend holidays in Ajara.

International visitors are more satisfied by hospitable people (38%) than local tourists (17%). The picture is similar in evaluation of other reasons of intended repeated visit: safety and remaining sights to see are more often listed as motive of future intended visits to Ajara by international tourists.

You will come back to Ajara, since...

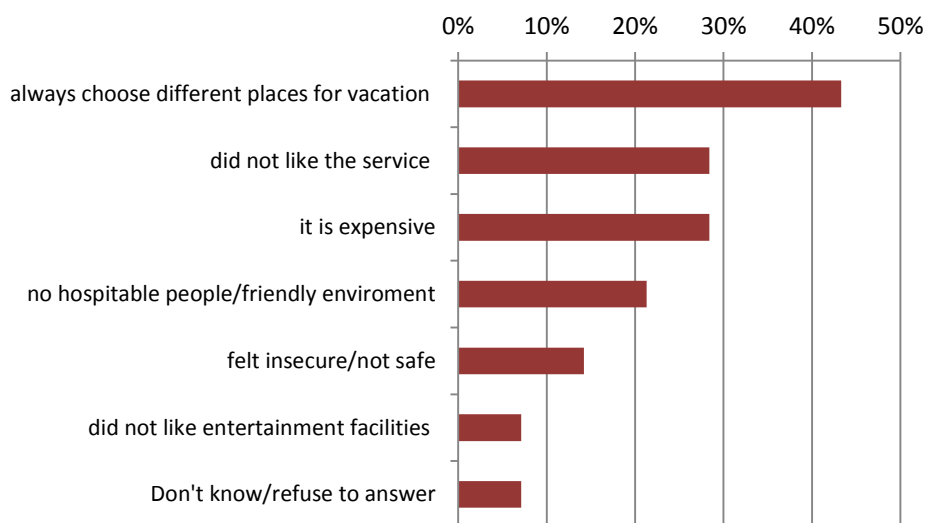
(Local/international tourists, general picture)



Majority of the tourists who do not intend to visit Ajara in the future state as a reason that they always visit different places, while high prices and low quality of service are equally popular motives of it.

You will not come back to Ajara because...

(General picture)



More than a half of tourists state that they would definitely suggest friends to visit Ajara – answer “recommendation to friends/relatives to visit Ajara” is quite positively rated by the respondents (4 – would recommend).

4.2.6 Conclusions

Generally, most of the tourists in Ajara are satisfied with the resort and they think that Ajara totally met their expectations, so there is a high probability that they will visit Ajara again. Among the tourists who express their dissatisfaction about Ajara name as their reasons for dissatisfaction noise caused by reconstruction and low quality service, expensive prices are also among the reasons which causes tourist’s negative attitudes. Tourists also think that there is problem of transportation within the cities.

It is noteworthy that main and priority source for obtaining information about Ajara are friends. Most of the tourists have not visited Ajarian tourist web page and presumably have no information about its existence.