



Assessing Uzbekistan tourist destinations: The perspectives of domestic tourism market

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	ABSTRACT
<p>2020 Research Leap/Inovatus Services Ltd. All rights reserved.</p> <p>DOI: 10.18775/jibrm.1849-8558.2015.56.3005 URL: http://dx.doi.org/10.18775/jibrm.1849-8558.2015.56.3005</p>	<p>This article reveals the development aspects of domestic tourism in Uzbekistan. Uzbekistan has high opportunities for the development of international and domestic tourism, as evidenced by the many objects and places of material and cultural heritage, natural and climatic conditions, unique national cuisine and unsurpassed hospitality of the Uzbek people attract travelers. This research aimed at investigating the status of attractiveness of the different Uzbekistan’s tourist regions from the perspective of the domestic tourism market with the goal of assessing the efficiency of the destination. We have analyzed theoretically the share of domestic tourism in the country’s economy and how it brings high efficiency to the economy. The purpose of this study is to analyze the development of domestic tourism in Uzbekistan and its effects on national economy. In analyzing the development perspectives, we used statistic and practical analysis methods. Data was analyzed using mainly descriptive statistics. The article concluded that the limited range of tourist activities available within most of Uzbekistan’s destinations, the limited travel information can lead to cause the lack of popularity of most Uzbekistan’s tourist destinations. This research highly recommends a huge effort to the tourism policymakers and firms to enhance all the country’s attractions and position them as destinations.</p>
<p>Keywords: domestic tourism, tourist destination, destination competitiveness, tourism development, tourism perspectives, destination analysis</p>	

1. Introduction

In recent years in Uzbekistan, along with traditional forms of travel, ecotourism, ecotourism, agriculture tourism, medical tourism and gastronomic tourism have also developed. Uzbekistan places particular emphasis on the modernization of the tourism industry, the development and improvement of the regulatory framework for the sustainable development of the industry, and the organization of tourist services in accordance with international standards (Patterson and Turreav, 2020). Government policy is aimed at developing tourism, so that this area in the future should become one of the drivers for accelerating the integrated development of regions and their infrastructure, helping to solve such important socio-economic tasks as creating hundreds of thousands of new jobs, ensuring diversification and accelerated development of regions increasing incomes, the level and quality of life of the population, increasing the volume of foreign exchange earnings, improving the image and investment attractiveness of the country. As implications for local communities differ among countries and can be both positive and negative, it is key for government to inform locals on relevance of the tourism for the economic development despite the socio-cultural differences among hosts and visitors (Ahmed, 2018). In other words, to profit from tourism and improve attractiveness, countries should focus on hospitality. Perceived hospitability enhances destination brand image and influences travelers’ preferences. A positive hospitality improves the economy as it attracts foreign investment (Chamard and Alaux, 2018).

In January-March, the number of foreign citizens visiting Uzbekistan for tourism purposes amounted to 1,214,000, while in the period April-June, the figure was around 2,100. At the same time, the number of Uzbek citizens who left the country for tourism purposes in January-March 2020 was approximately 1,400,000, and in April-June this figure plunged to 3,500. The number of foreign citizens who visited Uzbekistan as tourists in January-June of this year was 1,216,000, which, compared to the same period of 2019, has decreased by 60 percent. 95.5 percent of the total number of visitors was citizens of CIS countries, while the rest 4.5 percent came from other foreign countries.¹

The preferences and expectations of tourists were studied by questioning. The results of the survey show that tourists come to Uzbekistan, having sufficient information, a certain motivation and with purposeful aspiration. Visitors showed high interest in historical tourist tours and visits to museums, galleries, excursions, cultural events, visits to the countryside, walking / hiking, shopping and ecotourism. The majority of tourists are satisfied with the general quality of the standards of accommodation facilities, tourist products, transport services, food and overall quality of service, and also feel safe during the trip. Most tourists intend to visit Uzbekistan again within 5 years.

Currently, tourism is one of the leading sectors of the global economy. Therefore, Uzbekistan places particular emphasis on

¹ <https://kun.uz/en/news/2020/07/23/number-of-tourists-visiting-uzbekistan-decreased-by-60-percent>

the modernization of the tourism industry, the development and improvement of the regulatory framework for the sustainable development of the industry, and the organization of tourist services in accordance with international standards. During the years of independence, significant actions were implemented in Uzbekistan in terms of the development of this sphere with the preservation and enhancement of the historical and cultural heritage of the people, the revival of national traditions and customs, restoration and arrangement of the country's attractions.

From the first years of independence, Uzbekistan has been actively increasing cooperation with international organizations, and regularly comes up with initiatives to deepen cooperation in the field of tourism. The current trend of the tourism industry confirms the need to study the prerequisites, system analysis of the dynamics of tourism development, identifying preferences and expectations of tourists, timely correction and modernization of the system of measures, taking into account the existing realities and prospects, which served as the basis for this study

2. Literature Review and Methodology

Past studies on the Uzbekistan tourism are scarce however the review of most relevant studies is performed in the current section. Kayumovich (2020) explored the potential for facilitating the Uzbekistan tourism by increasing the adoption of digital transformation. Sabirov and Alimova (2019) assessed the potential for improving developmental efforts in Uzbekistan's tourist industry focusing on antecedents such as infrastructure, generating business opportunities, enhancing existing tourist services and diversifying tourist arrangements. Xudoyarov (2019) emphasizes how Uzbekistan tourist industry hinges on the country's peace, stability and solidarity that allows hospitality to people from diverse cultures. Olimovich (2015) explored how the historical and architectural monuments in Uzbekistan are increasingly becoming interesting to tourists from all over the world. The author determined tourism industry flourishes because its clean, exciting, inexpensive and safe.

Similarly other studies in the sphere of tourism are worth mentioning that provide a context for our study. Dwyer and Kim (2003) identify destination's resources including supporting resources as being the primary elements that together provide the various characteristics of a destination that can make it attractive to travel in their study of destination competitiveness. Marques, Candeias and Magalhães (2020) examined not only how a tourism expansion benefits an economy, but also how local community perceives the increase in activity. They found there are positive economic, socio-cultural and environmental aspects of tourist development. Rayviscic et. al (2012) showed their research that the limited sources of travel information and the limited tourist activities offered at most of domestic attractions may actually be leading factors contributing to the lack of awareness and popularity of most of tourist attractions. Lee et. al (2020) explored travel elements that have a positive influence on health in the domestic health tourism industry, with health being viewed across three domains: psychological,

physical, and social. Crouch and Ritchie (1999) presented their study about marketing initiatives as a one of the factors that has higher potential to improve the perceived appeal of a destination and to be competitive.

Pezeshki et. al (2019) created a hierarchical value map (HVM) which specified how Iranian senior tourists were associated with various attributes of domestic tourism destinations to definite consequences, and how such consequences helped them to satisfy their individual values.

While assessing the plausible future trends of mass travelling, Švajdová (2019) found that destination tourism will prevail in the near future and will benefit from adoption of modern marketing tools, including ICT. By adopting modern ICT tools, added value can emerge as a result of co-creation between service and destination providers and tourists (Berrada, 2017). Insufficient knowledge of modern tourism, additional economic studies are needed that will reveal the place of tourism in the domestic service sector, identify the signs, current problems and the most significant factors of its development, as well as determine the most comprehensive structure of national tourism.

3. Methodology

In the article, we have used statistics about the importance of tourism in the economy foreign journals, articles, scientific collections and prestigious from the annual reports of organizations as follows: World Travel Trends 2018/2019; Travel & Tourism Economic Impact 2019; UNWTO barometer 2018 – World Tourism Organization (UNWTO); Global Muslim Travel Index 2018; Travel & Tourism Economic Impact 2018 Uzbekistan and European Tourism in 2018: Trends & Prospects (Q4 / 2018).

For the analysis of the development perspectives and dynamics of domestic tourism in Uzbekistan, information has been received from official sources, statistical reporting data of the State Committee of the Republic of Uzbekistan for the development of tourism for 2015- 2019. To identify preferences and expectations of foreign tourists from abroad, statistic information has been analyzed and it has been taken from the State Statistics Committee of the Republic of Uzbekistan and the State Tourism Development Committee of Uzbekistan are used based on the consultations of an expert from the UNWTO.

4. Data Analysis and Results

According to statistics, the number of visitors purpose for most of them to come to Uzbekistan - visiting their acquaintances and relatives. This is 88.1 percent of the total number of visitors formed. The second largest segment is 8.6 percent is a holiday, recreation and leisure for Uzbekistan (travelers). Next up is business and visit to Uzbekistan for professional purposes group of customers (1.1 percent), Medicines and health treatments and trade (commercial) to 1 percent of visitors is correct. Average duration of each visit 6.9 nights, most tourists visit time (79 percent) from 1 to 9 nights, and 19.8 percent 10 from 39 nights. From 2 percent

of tourists less than 40 nights in the country. Uzbekistan until 2025 Development of tourism in the Republic visit to Uzbekistan according to targets the number of foreign tourists ordered in 2025 Delivery to 89.3 thousand people (in 2018 5.3 million) export of tourist services from \$ 1,040.9 million in 2018 Reaching \$ 2,232.8 million in 2025.

In Uzbekistan, a new stage of significant progress in the field of international tourism began from the beginning of 2017. In 2018, a visa-free regime was established for citizens of Israel, Indonesia, the Republic of Korea, Malaysia, Singapore, Turkey, Japan, Tajikistan and France. In addition, the procedure for issuing visas to citizens of 39 countries has been simplified.

The efforts of the leadership of the Republic of tourism infrastructure in recent years raised to a fairly high level. The measures taken to support and protect the private sector contributed to the increase in the number of tourist organizations and hotel facilities. There are 1,667 tourist organizations successfully operating in the country, including 989 tour operators and 869 hotel facilities. An extensive network of hotels with more than 25,000 beds meets modern international standards. Thanks to the truly extensive work on the construction and reconstruction of infrastructure facilities in Uzbekistan, 11 airports received the status of international harbors. Modern comfortable airplanes consisting of Boeing and Airbus airliners operate regular flights to more than 40 cities in Europe, Asia, the Middle East and America. Tourists visiting Uzbekistan have the opportunity to get to the sights of the republic and through railway transport. So, besides the usual and high-speed trains, high-speed trains "Afrosiab" produced by the Spanish company "Talgo" run daily between Tashkent, Samarkand, Shakhrisabz and Bukhara, which significantly improved the quality of guest service and reduced the trip time.

In recent years, major investment projects have been implemented for the development of tourist infrastructure, including the opening of the Lotte City Hotel Tashkent Palace and Hyatt Regency Tashkent brand hotels in Tashkent, the creation of cultural and entertainment parks in Andijan, Urgench, Tashkent, the opening of railway line "Angren-Pap." Also new types of travel, including ecological tourism, have been actively introduced in Uzbekistan. The presence in the republic of reserves, national parks, nurseries, wildlife reserves, natural monuments, biosphere reserve makes ecotourism in a very promising direction. In Uzbekistan, ecotourism, medical tourism, mountaineering and rafting have also developed. Recreation areas and comfortable infrastructure facilities are being built in the regions. In the sports and recreation centers "Chimgan", "Beldersay" and "Charvak" the necessary conditions are created for practicing alpine skiing and other winter sports, where mountain trails of different types are built with a length of 300 to 3 thousand meters. There is a cable car here. In Uzbekistan, the gastronomic direction of tourism is also gaining popularity, the development of which allowed to make pilaf and other national dishes a recognizable brand of the country.

Significant role in ensuring the accelerated development of the tourism sector of Uzbekistan, the formation and maintenance of the country's image on the world market are played by major events regularly held in the country. One of the most important annual events is the Tashkent International Tourism Fair "Tourism on the Silk Road." Today it is the largest forum in Central Asia where industry professionals meet, negotiate in various formats, including business-to-business, the Hosted Buyers program is being implemented for buyers of the national tourist product, and conferences are being held on topical issues of the development of the tourism industry in Uzbekistan and the world generally. Representatives of our country also regularly participate in international fairs and exhibitions held abroad in order to present the tourist potential of the republic. Participation in them allows you to stay abreast of the latest trends in the global tourism market, enter into business contracts, and develop cooperation with foreign partners.

The state policy in this direction is aimed at the development of tourism, so that this area in the future should become one of the drivers for the accelerated integrated development of the regions and their infrastructure, to contribute to the solution of such important socio-economic tasks as the creation of hundreds of thousands of new jobs, ensuring diversification and accelerated regional development, increasing incomes, the level and quality of life of the population, increasing the volume of foreign exchange earnings, improving the image and investment attractiveness STI country.

The State Committee of the Republic of Uzbekistan for the Development of Tourism has been tasked to ensure, together with the relevant ministries and departments, an increase in the number of tourists in all promising areas of tourism and the volume of real export of tourist services at least twice in the next 5 years. For the period 2015-2017, the export of tourist services grew by 33% and amounted to USD 546.9 million in 2017, and for 9 months of 2018 - USD 773.4 million, exceeding the figures of 2017 in total by 41%.

The result of the measures taken by the state, in the direction of tourism, is an increase in tourists arriving in the republic. Thus, according to the State Committee for the Development of Tourism of the Republic of Uzbekistan, over 2 million people from different parts of the world visit the country annually. The number of arriving foreign visitors to Uzbekistan is growing at a high rate every year. The average annual growth rate of foreign visitors to 2016 over the past five years was 8%. In 2017, 2,690 thousand tourists entered the Republic of Uzbekistan. This figure is 32.7% more compared to 2016, when the number of tourist arrivals was 2,027 thousand people (Source: Analysis by the State Committee of Tourism).

As the data presented in Table 1 for eleven months (January-November) of 2018 shows, the number of foreign tourists was 4,896,397 people and exceeded the figures for the same period in 2017 by almost 2 times - by 94.8% (Table 1).

Table 1: Regions of arrival of tourists entering the Republic of Uzbekistan (for the 11 months of 2017-2018)

Regions	11 months 2017		11 months 2018	
	Total	In% to total	Total	In% to total
CIS countries	2 342317	93,2%	4 590740	93,8%
Foreign countries	171238	6,8%	305657	6,2%
Drove just	2 513555		4 896397	

Source: State Committee of Tourism (2019)
uzbektourism.uz

The geography of foreign guests is wide. At the same time, the number of tourists from neighboring countries traditionally prevailed in the structure of arriving tourists. This phenomenon continues to persist as before - the share of tourists from the CIS countries for 11 months of 2017–2018. Amounted to 93.2% and 93.8%, respectively. The share of tourists from non-CIS countries during this period was only 6.8% and 6.2%, respectively.

The number of tourists from the CIS countries for 11 months of 2018 amounted to 4 590 740 people and exceeded on average the figures for the same period of 2017 by 1.9 times (Table 2). The increase in the number of tourists who have entered is noted from almost all CIS countries. The largest growth for 11 months of 2018 compared to the same period of 2017 was from Armenia (+143.4 times), the Republic of Moldova (+133.3 times), Ukraine (+15.5 times), Tajikistan (+5.0 times) and Turkmenistan (+3.4 times). The absolute number of visitors, who entered the Republic of Uzbekistan for 11 months of 2018. The leading positions are occupied by the countries of Central Asia - Kazakhstan (2,124,631), Tajikistan (984,804), Kyrgyzstan (959976), Turkmenistan (146,348) and the Russian Federation (343,128).

The share of tourists from non-CIS countries during this period was only 6.8% and 6.2%, respectively. In recent years, there has been a significant positive trend in the number of visitors entering the Republic of Uzbekistan from non-CIS countries. The number of tourists from non-CIS countries for 11 months of 2018 was 305,657 people and exceeded on average the figures for the same period of 2017 (1,71238) by 1.8 times (Table 3). For the period under review, the growth in the number of tourists who entered has been observed from almost all foreign countries that have traditional tourist ties with Uzbekistan, with the exception of Iran (-15.1%). Of the far-abroad countries, Uzbekistan is especially popular with citizens of Turkey, Germany, France, Italy, the Republic of Korea, Japan, China, Malaysia, India and the United States. The most significant increase in tourist flow in the first 11 months of 2018 compared to the same period in 2017 was from the United States (+8.3 times), Italy (+3 times), United Kingdom (+2.6 times), Israel (+2.6 times), Germany (2.5 times) and France (+2.4 times). According to the number of visitors, who entered the Republic of Uzbekistan for 11 months of 2018. The first place was occupied by Turkey (37928). Also, a substantial number of visitors came from China (29,736), the Republic

of Korea (25,634), India (19,161), Germany (17,699) and Japan (16,487).

5. Conclusion

From the above results and statistic information, the following conclusions can be drawn. First of all, it is dynamic to pay special attention to the developing tourism industry and to create a wide range of opportunities. The next ten out of every four new jobs per year is employed by the tourism sector across the country. Then, it also contributes significantly to the reduction of unemployment rate. This, in turn, can lead to get a high income for the population and it is also considered as the source of income. Especially short trips, urban tourism, gastronomic tourism and pilgrimage tourism development, urban infrastructure development, variety construction of hotels, and restaurants improve services, for tourist shopping production of assortment of demanding products. These are just some of the goal setting that we can use including tourism and transport infrastructure, as well as the world - famous hotel business providing benefits, including chains attracting foreign direct investment. Secondly, like modern and branded hotels, hostels, family hotels, budget accommodations, as well as from the Airbnb system (renting apartments, using the introduction of this system) should be accelerated.

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