

# Analysis and perspectives of tourism development in Uzbekistan

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## Abstract

An analysis of tourism development and its perspectives in Uzbekistan is carried out in this article. The purpose of this analysis is to study international tourists' arrivals into the country since its independence in 1991, the economic impact of the tourism sector into the overall GDP, country ranking and destination image. Destination image plays significant role in choice of many travellers. Nevertheless, today Uzbekistan doesn't have a strong image that could be associated with destination. Moreover, it is sometimes difficult to distinguish the uniqueness of Uzbekistan, especially in relation to its geographical position as the middle part of the Silk Road. Empirical study of destination image by first time visitors was carried out in our research in order to measure the image of Uzbekistan as a tourist destination.

Key words: tourism development, country ranking, destination image, Uzbekistan, Central Asia, the Silk Road.

## Resumen

En el presente artículo se lleva a cabo un análisis del desarrollo del turismo y sus perspectivas en Uzbekistán. El objetivo de dicho artículo es el estudio de las llegadas de turistas internacionales en el país desde su independencia en 1991, el impacto económico del sector turístico en el PIB, el ranking del país y imagen de destino. Imagen de destino juega un papel significativo en la hora de selección destino turístico. Sin embargo, hoy Uzbekistán no tiene una imagen fuerte que podría estar asociado con el destino. Por otra parte, a veces es difícil distinguir la singularidad de Uzbekistán, sobre todo en relación con su situación geográfica como la parte central de la Ruta de la Seda. Estudio empírico de imagen de destino se llevó a cabo en nuestra investigación con el fin de medir la imagen de Uzbekistán como un destino turístico.

Palabras claves: desarrollo turístico, ranking por los países, imagen de destino, Uzbekistán, Asia Central, la Ruta de la Seda.

## 1. Introduction

The travel and tourism industry was previously neglected, and was not considered as a priority in the economy. However, considering Uzbekistan's geographic location and tourism resources, it could become a high-earner, and a substantial contributor to the overall economic performance of the country (Golischeva E.V., 2012). This situation of neglect seems to be gradually changing.

Before independence, international tourism to Uzbekistan was conducted through Moscow. It means that contact to the global tourism was through Moscow-based organization, Intourist, which is in his turn had brunches all along former Soviet Republics. Transport links were through Moscow, state courier Aeroflot and all financial information was co-ordinated through Moscow. It means that Uzbekistan not only had to develop his transport links, but also to develop contacts with global tourism market and to represent its own destination and not part of Moscow itinerary. (Airey&Shackley, 1997)

**Map 1. Map of Uzbekistan. Source: [www.nationsonline.org](http://www.nationsonline.org)**



## 2. Tourism development

Since receiving its independence in 1991, Uzbekistan has begun to structure and organize its tourism industry. The first step in charge of tourism issues was creation of National Company "Uzbektourism" which was

founded upon the resolution of the President of the Republic of Uzbekistan on July 27, 1992. National company "Uzbektourism" is the main coordinating body, which provides the development of a unified state policy in sphere of tourism within the territory of the Republic of Uzbekistan.

Uzbekistan has been modernizing its airports, air fleet, railroads and roads. Some big projects include modernization of the Tashkent's airport infrastructure, the works associated with the modernization of the regional airports. (Kantarci K., 2007).

Tourism industry in Uzbekistan was granted tax exemptions, simplified and liberalized system of licenses to engage in tourist activities. Those companies providing tourist and excursion services are exempt from paying value added tax (VAT)<sup>1</sup>; licenses are issued without time limitation<sup>2</sup>. These measures have contributed to a sharp increase in activity of tourism sector representatives and outlined the increasing role of the sector in the development of the service industry.

Because Uzbekistan possesses various tourism attractions and resources, there is a potential of development of different types of tourism products. A rich cultural and historical heritage, location along the Great Silk Road, as well as ancient traditions and in culture and arts can attract to the country cultural, religious, archaeological and ethnographical tourists. In Uzbekistan, there are many unique sacred places are valuable for people professing in Islam, Christianity and Buddhism. It provides an opportunity to develop pilgrimage/religious tourism. The availability of a large number of magnificent natural objects (lakes, mountain tops, river meadow woods, steppes and desert landscapes) can help to develop ecological and adventure tourism in the country. However nowadays, out of 8.000 cultural and natural heritage in tourism industry is used only 5-8%, which means that tourism potential is not used in its full context. (E.V.Golisheva, 2012)

There are no published study results on the profile of a foreign tourist. Each tourism company identifies such a profile by studying its clients. This is not enough to gain an understanding of the overall picture that addresses the question who, when, with what purposes, and with what kind of demands arrive in Uzbekistan. (Policy brief, UNDP 2007).

The flow of tourists into the country is unstable. During the last 18 years, maximum value of tourist's arrivals reached a 1,215,000 in 2009 and a minimum value a 92,000 in 1995. The first leap after independence was in 1997. It was the year when Uzbekistan celebrated anniversaries of two historical and famous cities: Bukhara and Khiva. Historical centres of

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<sup>1</sup> Tax code of Uzbekistan (art 208)- Tashkent: Adolat, 2008 -p.545

<sup>2</sup> Decree of President of the Republic of Uzbekistan "on reduction and simplification of licence procedures for entrepreneurship". Tashkent, 21.09.2005

both cities are included into the list of World Heritage of UNESCO and both of them celebrated anniversary of 2500 years. Nevertheless, there have been fluctuations in the quantity of international tourism arrivals in Uzbekistan. Since 2007, tourist flow was increased by 61% in comparing with 2006, and following years it was growing more. In 2008 for the first time the number of tourists reached a million, and 2009 was the year with the largest number of tourists during the last 18 years, which grew by 13,6% in comparison with 2008. Last several years tourists' arrivals in average is around a million annually. World Travel Tourism Council (WTTC) predicts that by 2024 the number of tourist arrivals will reach 2.257.000. Forecasts for visitor numbers are based on a matrix of visitor demand derived from UNWTO statistics on the country of origin of foreign visitors (UNWTO Yearbook of Tourism Statistics 1995-2012). In effect, a country-specific index of the potential growth in each country's tourism source markets is derived, using information on the growth in real travel spending abroad from the country's most important sources of visitors and (as weights) the typical geographical source of the country's visitors.

The results of economic impact analysis for Uzbekistan indicate that direct contribution of Tourism in terms of GDP was US\$ 0,463 billion in 2012, which equated to a contribution of 1 per cent of Uzbekistan's GDP and implied that Uzbek tourists' sector directly supported 110.000 jobs, representing 0,8 per cent of total employment in Uzbekistan. The direct contribution to Travel & Tourism is forecast to rise by 5.6% pa, from 2014-2023, to US\$ 0,812 billion (0,8% of GDP) in 2023 (in constant 2012 prices). By 2023, Travel & Tourism will account for 151,000 jobs directly, an increase of 3.4% pa over the next ten years.

Taking into account supply chain impacts and the impact of capital investment and collective government expenditure on behalf of tourism economy industry, the wider Travel & Tourism economy measure the overall contribution of tourism economy sector in Uzbekistan accounted US\$ 1,485 billion in 2012 (3.1% of Uzbekistan's GDP) and 361.400 jobs (2,6 per cent of total employment in Uzbekistan) in 2012. The total contribution of Travel & Tourism is expected to grow by 5.8% pa to US\$ 2,696 billion by 2023 (2.8% of GDP). By 2023, Travel & Tourism is forecast to support 510,000 jobs (2.4% of total employment), an increase of 3.5%pa over the period.

### **3. Country ranking**

WTTC provides country ranking (out of 184 countries) of tourism industry dividing into absolute and relative contribution.

**Table 1. Ranking: Absolute contribution (WTTC), 2012**

Travel & Tourism 's Direct Contribution to GDP		2012 (US\$bn)	Travel & Tourism 's Total Contribution to GDP		2012 (US\$bn)
	World Average	17,2		World Average	52,3
<b>128</b>	<b>Uzbekistan</b>	0,5	<b>123</b>	<b>Uzbekistan</b>	1,5

**Table 2. Ranking: Relative contribution (WTTC), 2012**

Travel&Tourism 's Direct Contribution to GDP		2012 (%)	Travel&Tourism 's Total Contribution to GDP		2012 (%)
	World Average	5,2		World Average	14,1
<b>182</b>	<b>Uzbekistan</b>	1	<b>177</b>	<b>Uzbekistan</b>	3,1

The absolute contribution ranking is based on the total amount the Travel & Tourism industry contributed to the country's GDP. So the larger the industry is, the higher the country's ranking. In 2012, the top three in this ranking were the United States, China, and Japan.

The relative contribution ranking relates the size of the Travel & Tourism industry to each country's overall GDP (in %). In other words, it looks at Travel & Tourism in proportion to the entire economy. So a smaller country/economy can be ranked above a larger country if the Travel & Tourism industry makes a relatively high contribution to the economy. The top country on this ranking in 2012 is Macau, where the total contribution of Travel & Tourism contributes 92.9% of the total GDP.

In the case of Uzbekistan, the country is ranked higher in the absolute ranking than in the relative ranking. This indicates that the Travel & Tourism in Uzbekistan makes a relatively small contribution to the country's overall GDP. Nevertheless, since the overall GDP is higher than smaller countries where Travel & Tourism makes a larger contribution, it is ranked higher in the absolute ranking.

The long-term growth rankings on the country reports refer to the growth rates of total contribution to GDP in absolute terms. It is supposed by 2023 country will be risen to 92 positions and will be number 31 out of 184 countries.

#### **4. Destination image and factors forming the image of destination**

What influence the individual's choice to take a holiday to certain destination? Destination image plays significant role in destination choice.

There is no definitive meaning of destination image. Lawson and Baud-Bovy (1977) defined a destination image as the expression of all knowledge, impressions, prejudices and emotional thoughts an individual or group has of a particular object or place. Later Crompton (1979) described

it as a "the sum of beliefs, ideas, and impressions that a person has of a destination".

At the same time destination image consists of different components. Two major of them are cognitive and affective components. Cognitive image is defined as evaluative image, which is referred to beliefs and knowledge about an object whereas affective refers to feelings about it. (Baloglu & McCleary, 1999).

Gunn (1988) formed seven steps model of destination image. In the first step, destination image is formed based on secondary sources of information. Secondary sources are non-tourist information about the destination (books, school lessons, movie, television documentary, friends' stories etc.). According to Crompton (1979) and Balogly & McCleary (1999) the major source of influence when choosing a destination is the information from the social environment, formed by friends and family. Therefore, destinations should keep in mind that providing a pleasant experience for their tourists have a major effect on the development of positive images for non-visitors. Thus, any person can build an image of any destination without ever having been there. In other words, the image of the destination will be based on historical, political, economic and social information which, in turn, will shape the image that the person already held (Echtner & Richie, 1991). Gunn calls it *organic* image.

It is only in the second step commercial sources of information, such as travel brochures, guidebooks are used. As a result of these additional sources of information the destination image can be modified. The person decides to go on vacation, choosing the time spent on vacation, destination and type of tourism product. It is during this period that the image of vacation is changed, clarified and expanded. The image developed becomes clearer once the vacation plan has been finalized.

Numerous studies evaluated changes in destination image by comparing pre- and post-travel images, confirming that actual visitation contributes to changes in destination image. (Pearce 1982, Phelps 1986, Chon 1991, Fakeye and Crompton 1991). One of the research was investigated among South Korean travellers to Central Asia (Uzbekistan, Tajikistan, Kazakhstan, Kyrgyzstan and Turkmenistan). By comparing pre-travel images of Central Asia and benefits sought from the trip (expectations) with post-travel images and benefits received (actual experiences), the study found that some pre-travel images of Central Asia and benefits sought were significantly different from post-travel images. Specifically, visitors developed a better affective image of Central Asia after the trip. Changes in the cognitive image of Central Asia were noted, however, to a different degree. (Lee C.K., Kang S., Reisinger Y., Kim N.,

2012). *Modified induced* image is the result of personal experience to the destination, which is the last step of the model.

Demographic variables also strongly influence the image tourists have of tourist destinations (Firmino Santos & Carneiro, 2006). Beerli and Martín (2004) report that motivation; socio-demographic variables and experience are important factors for forming the image of a tourist destination. In addition, the country of origin of the person influences the image that they build of tourist destinations (Bonn, Joseph & Dai, 2005)

## **5. Techniques in measuring the destination**

Echtner and Ritchie (2003) made a review of techniques used in measuring the destination image, which are divided into structured and unstructured methodologies.

In a structured methodology, various common image attributes are specified and incorporated into a standardised instrument usually a set of semantic differential or Likert type scales. In other words, that respondent has closed question, e.g. he may choose from the range of answers only one if it is a Likert type scale. In case, if the question is having multi choice option can mark several of them, but from the proposed list. In structured methodology, results are easy to analyze, simple to code and facilitate the comparison of several products. Structured methodologies are attribute focused. In other words, they force the respondent to think about product image in terms of the attributes specified by the scales. Furthermore, scale items are not designed to measure the unique characteristics of the product. They rather force the respondent to rate the product on more general traits.

Unstructured methodology is an alternative form of measurement. In this case, the respondent can more freely describe his/her impression of the destination, having open-ended question. Data is gathered from respondents through open-ended question or focus groups. It means respondent can uniquely express his thoughts about the question. Content analysis and various sorting and categorization techniques are then used to determine the image dimensions. In this manner, unstructured methodology is more conducive to measuring the holistic components of destination image.

## **6. Brand of Uzbekistan**

In the strategy to promote the country as a tourist destination, an effective brand holds a special place. In the tourist community of Uzbekistan there is conception that a successful tourism brand contributes to not only strengthen the position of the national tourist product in

overseas markets, but also enhance the overall image and credibility of the country as a tourist destination.

According to Marat (2009), Uzbekistan's government has so far monopolized the process by limiting the participation of the domestic audiences in the development of its country brand image.

"Uzbektourism" in 2009 had decided to hold a competition for "the best tourist brand of Uzbekistan". According the evaluation of the results, have been adopted and approved by the administration tourist logo only – the style of writing the name of the country.



There are undoubted competitive advantages of the national tourist product of Uzbekistan, which is a significant number of historical, archaeological, architectural and natural sites, including those associated with the Great Silk Road, which has attracted the major flows of foreign tourists into the country. The unique cultural heritage of Uzbekistan, various forms of art and traditional crafts, the mentality of the people, its folklore, gastronomy and more distinguish this country from its nearest neighbor, every day is increasingly competing with it in the international tourist market.

In order to be successfully promoted in the international market, a destination must be differentiated from its competition and positively positioned in the minds of the consumers. (Calantone, Di Benetto, Hakam & Bojanic, 1989). It is sometimes difficult to distinguish the uniqueness of Uzbekistan, especially in relation to its geographical position as the middle part of the Silk Road. Moreover, almost all the countries along the Great Silk Road and especially those, which are located in the same region, are promoting their tourism product based on the brand the "Silk Road", which is partially blurs the uniqueness of each country.

Having analyzed numbers of foreign travel agencies who offer Uzbekistan as a tourist destination we face that almost all promotion are linked to the "Silk Route", "the golden road to Samarkand" or "1001 nights". In turn of Uzbek travel agencies along with Silk Road brand the stress is made on promotion and information about Uzbekistan as a country with a rich culture, amazing architecture and centuries-old history. Uzbek travel agencies offer wider selections of places of interests and not only



standard tours. Apart of historical places, it is offered hiking, rafting, natural reserves and less known towns of Uzbekistan.

At the international TV channel «Euronews» an advertising campaign has been started in May 2013, devoted to the economic, investment and tourist potential of Uzbekistan. Three times a day, in the heading of «Prime time» in the morning and evening hours, it shows the 35-second promotional video «Welcome to Uzbekistan» in English and Russian languages.

In October-December 2013, Euronews started to broadcast programmes about the historic centres of Uzbekistan – Samarkand, Shahrisabz, Bukhara and Khiva. From December 2013 Euronews commenced to broadcast a 30-second advertisement about tourism potential of Uzbekistan. Finally, the slogan was created for Uzbekistan “Uzbekistan – the symbol of the magic east” in December 2013.

Uzbektourism says that the advertisement will help to promote tourism potential of Uzbekistan among 370 million viewers of Euronews and should assist to increase tourist’s inflow to historic cities of Uzbekistan.

## **7. Description of sample and fieldwork**

Two specific questionnaires, which combine structured and unstructured methodology, were developed to investigate the image of Uzbekistan. The program IBM SPSS 21 was used in order to measure results of both surveys:

- a) Survey of tourists
- b) Survey of tourism officials in Uzbekistan

Tourists who have visited Uzbekistan in 2012 form the target group of the first survey. As a result of the survey of tourists 17 respondents are citizens of the Russian Federation and 34 are citizens of all other countries, who are mostly Europeans, but also citizens of some Asian countries like India, Pakistan, Singapore and Malaysia.

The survey of tourists was conducted through the internet via personal emails in cooperation with one of the Uzbek travel agencies. The image of destination of non-visitors, potential visitors and returned visitors will be different. In our case, the survey was conducted among returned tourists who had visited Uzbekistan only once. The results obtained with a sample of 51 tourists, which evaluated various attributes of the destination and the appreciation of the same by tourists. The survey analysis combines qualitative and quantitative phases. The survey was carried out in two languages: English and Russian. The inquiry form consisted of nine questions.

The first survey at global level 66,7 % represent the opinion of men and 33,3% the opinion of women. Survey respondents about the image of Uzbekistan had an average age 43,19 years. The youngest respondent was 25 years old and the oldest 75 years. The majority of respondents were 35 years old.

The second survey was conducted, but among employees of the tourism sector in Uzbekistan. The survey had similar questions in order to be able to compare the assertions of both sides. The second survey was conducted in Uzbek and Russian languages, in consequence of which had been received 51 completed questionnaires.

Thus, we want to compare the image of the destination between the tourists who had visited Uzbekistan and employees, providing tourism services.

In the second survey participated 54,9% of men and 45,1% of women aged from 23 to 62 years old. The average age of respondents was 40,6 years old. The positions of respondents were distributed in the following way: tour guides (52,9%), owner/manager of travel agency or hotel (27,5%), receptionist (11,8%) and tour operator (7,8%).

The minimum work experience of tourism officials is 2 years, and the maximum 39 years. A 62,8% of respondents are working more than 10 years in the tourism sector. Almost a quarter of respondents (25,6%) have been working since the Soviet Times in once famous "Intourist".

## **8. Comparison of two surveys**

Both surveys contained an open-ended question in order to measure the holistic component of the destination. The question seeks to describe the general impression respondents have about destination. It is part of unstructured methodology, having qualitative nature. Once the information was collected, it had been segmented and divided into different groups with similar characteristics. Through this question, we wish to find out what is the holistic image that Uzbekistan has as a tourist destination.

*Historical cities*, the *Silk Road*, *beautiful architecture* and *rich history*, are the most frequent responses in both groups. *Historical cities* and *beautiful architecture* are the most frequently occurring images or characteristics, which come to the mind of tourism officials. *Samarkand* and *Registan* are not representative images for them. Nevertheless, among tourists the *Silk Road* was one of the main association with destination along with *historical cities*.

**Table 4. Which images or characteristics come to your mind when you think about Uzbekistan as a tourist destination?**

	Tourists	Tourism officials
Historical cities	29,4%	37,3%
The Silk Road	23,5%	15,7%
Beautiful architecture	13,7%	29,4%
Rich history	15,7%	13,7%
Samarkand	9,8%	0%
Registan	7,8%	0%

A pilot survey was carried out prior to the main survey, primarily to gain information to improve the efficiency of the main survey. Consequently, the question "how did you find about existence of Uzbekistan for the first time?" was very surprising among Russians, as they have answered "because of the common past during the Soviet period". Therefore, this question was deleted from the survey for Russians. For the rest of the tourists the most common way in which they for the first time heard about Uzbek destination was through secondary sources of information, which do not have commercial purpose: books (35,3%) and family/friends (35,3%). A significant percentage has internet (11.4%).

Tourism officials consider friends/family (33,3%) and internet (31,4%) having significant impact on promotion of destination at the same time commenting about poor advertisement campaigns in a mass media. A 23,5% of tourism officials believe that books are one of the main sources where for the first time potential tourists may find existence of the country, or at least about cities, later discovering that they are located in Uzbekistan.

Multi choice question about the purpose of the visit shows, that according tourism officials *culture* (84,3%) and the *Silk Road* (29,4%) are what tourists are looking for in Uzbekistan combining it with their *vacations* (25,5%). Meanwhile, a small percentage of tourists consider the *Silk Road* to be one of their purposes of visit, thus separating the country out of all countries where the Silk Road had passed.

More than half of tourism officials (52,8%) said, that before visiting the country tourists think *neutral* about the country, they actually don't know what to expect in reality, still having association with dangerous country due to border with Afghanistan. A 35,4% of tourism officials think tourists have a *good* image about the country, but no one of them marked *very good*. In turn of tourists 45,1% have *neutral* image before travel to destination or rather good image (45,1%).

In spite of 100% of tourism officials are sure that at the end of the travel tourists feel very satisfied with their stay and experience travelling to Uzbekistan that they do have desire to be back while 88,2% of tourists would like to repeat their visit to this destination.

## **9. Conclusion**

The research carried out of available materials allowed us to draw the following conclusions of the tourism development in Uzbekistan. Uzbekistan has long been considered to have a great deal of potential as a popular tourist destination. For at least a decade, the industry has been expected to boom, and in many ways the country has prepared itself for this potential to be realised, but tourism is developing at only a relatively slow pace. Today tourism in Uzbekistan has low income into the GDP of the country. However, since independence the increase of tourist arrivals was recorded in the country. Compared with some other countries located in the same region and offering similar tourism products, Uzbekistan has more variety and number of tourist resources, and more precisely, it has an advantage geopolitical location, rich cultural, historical and natural heritage. Meanwhile, today Uzbekistan has a very modest place in the global tourist market. Objective assessment of Uzbek tourist resources has shown that, having the exotic and unique attributes, they loose to foreign offers in level of service, access and promotion.

Tourism could easily become the most important Uzbek industry in terms of incomes, job creation and number of people benefiting from its direct and indirect impacts. Nevertheless, today it doesn't have its right place in the economy of Uzbekistan.

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