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ИНСТИТУТ ПО ОСВЕЩЕНИЮ ВОЙНЫ И МИРА

CREATING A TOURISM BRAND FOR UZBEKISTAN: OPPORTUNITIES AND CHALLENGES





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The publication discusses the problems of developing a tourism brand in Uzbekistan and provides broad recommendations for its further growth and promotion.

The publication is intended for young experts, consultants, researchers, decision makers, and the diverse readership interested in the politics of Central Asia.

The opinions expressed in this document are those of the author and do not necessarily reflect the position of the analytical platform CABAR.asia.

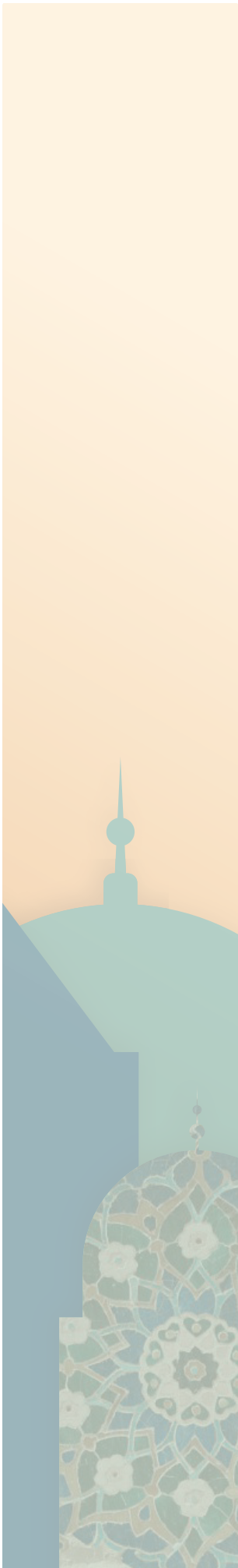
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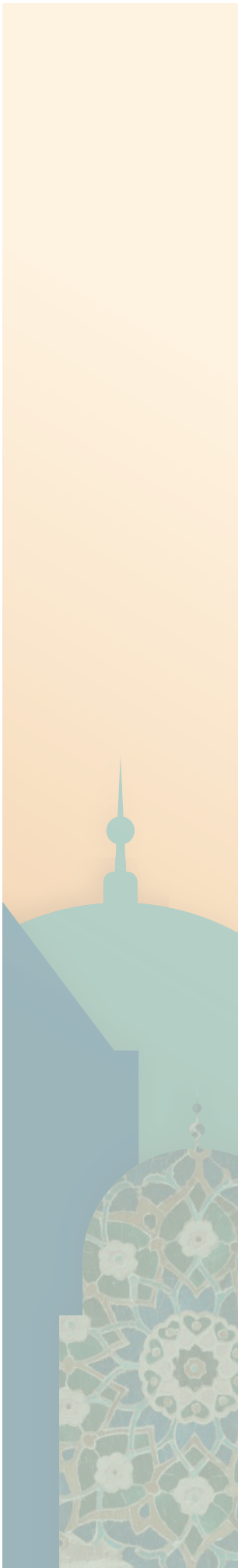
SUMMARY

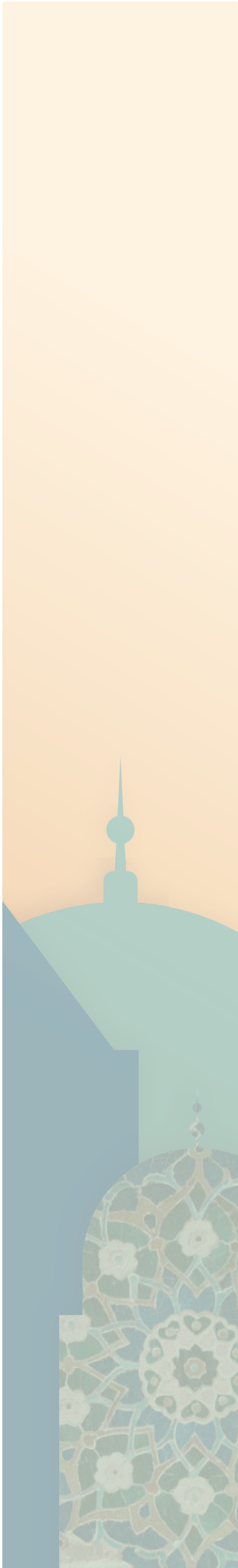
Uzbekistan has embarked upon a long-term strategy for the development of its tourism industry, the ultimate goal of which is to turn the country into an attractive center of world tourism, earning it a place among the most popular tourist destinations on the world map.

The pandemic has made its own adjustments, relegating to the background many projects and initiatives put forward at state level. Learning from the experience of foreign countries shows that the long-term absence of a unified policy and strategy in the country in the field of tourism is considered an urgent problem hindering the development of this sector. The most important task facing the tourism industry of Uzbekistan today is the active promotion of its brand, ensuring the quality of services and competitiveness in the market. The country should be positioned as a unique product, yet understandable, affordable, convenient, high-quality, safe, and interesting at the same time. This is complex work that requires constant efforts, professionalism, feedback and creativity, both from government agencies and the private sector.

MAIN CONCLUSIONS

-  Tourism development intends for the implementation of effective management decisions at state and local levels. The implementation of development strategies, compliance with regulatory legal acts, proper performance of the duties of responsible persons and ensuring the quality of work mechanisms will achieve positive results in the near future.
-  The sphere needs to create a “digital image of Uzbekistan” in order to turn the country into a more open, accessible, preferable travel destination. There is a need for the further digitalization of services, the creation of additional amenities and opportunities for potential tourists in one click. It will also strengthen the PR strategy to promote tourism.
-  Developed infrastructure and well-established logistics are essential components of the tourism industry. From this point of view, it is necessary to reduce the time and cost of bringing a traveler to Uzbekistan. The main flows of tourism to Uzbekistan are travelers from other Central Asian countries. In this regard, it is necessary to develop a scheme of convenient tourist routes within the country, between the countries and within the region.
-  Service along tourist routes needs to be improved and qualitatively new service standards introduced, it is necessary to develop and implement state projects for the development of roadside infrastructure facilities.





Tourism development cannot be imagined without public-private partnerships, private initiatives and “bottom-up innovations”. The priority of the tourism development strategy should be the training of personnel with complex skills and the support of innovative solutions and new business ideas from the state.



It is important that the development of domestic tourism is not left in the shadow of initiatives to attract foreign tourists. The development of additional incentives specifically for local travelers will make it possible to promote domestic tourism as an independent direction that generates income and minimizes the contrast of tourist flows between high and low seasons.



Tourism, despite the pandemic, has become one of the priorities of the country’s socio-economic development goals which contributes to economic growth. In the long term, development of the tourism industry serves all the strategic goals of the state, which is able to create conditions for preserving itself, its dignity and passing on the heritage to the next generations.

INTRODUCTION

The development and rational use of the country's tourism potential opens a window of opportunity in the present and increases social and economic well-being in the future. This is a chance to become developed and sustainable, while relying on internal resources.

First of all, tourism is considered the best option for making a profit by monetizing the historical and cultural advantages of the country. In addition, the development of the sphere serves long-term goals - a more meaningful existence. In a broad sense, this is a state that is able to create conditions for preserving itself, its dignity and passing on its heritage to the next generations.

The task of building a travel brand during a global pandemic seems to be secondary when tourism, services and entertainment are the first to be hit. Of course, in the «epoch of self-preservation» tourism is not among the top priorities of the state for the introduction of anti-crisis measures, but it indirectly supports people in the labor market through support for affected industries and businesses.

POST-PANDEMIC DEVELOPMENT OBLIGES TO RETURN THIS TRADITIONAL SPHERE INTO THE LEAD, SINCE TOURISM IS AN "AMBULANCE" IN ECONOMIC RECOVERY.

Uzbekistan is faced with the task of implementing a long-term strategy for the development of tourism, which, together with economic well-being, should also allow it to become a productive state. Moreover, the preservation and development of historical and cultural heritage is ultimately associated with the transmission of values, which is not subject to either crises or pandemics.

CONCEPTUAL FRAMEWORK AND DEFINITIONS

“Tourist brand of the country” is part of the “nation branding”. The latter is studied in the context of research on the strategic development of the state, its competitiveness and nation-building.

The concept of «nation brand» was introduced into scientific circulation by Simon Anholt in 1998. By nation brand, the scientist understood «the identification of a country and a nation with trademarks and brands»¹.

According to the concept of nation brand, «each country strives to be unique and develop its power, positioning them only from the best side in order to be competitive in the international arena»².

Scientists propose to divide nation brand into four parts:

1. marketing the country's image;
2. investment attractiveness;
3. tourist and infrastructure attractiveness;
4. social attractiveness³.

One of the reasons for the development of nation brand is associated with the struggle to attract foreign investment and tourists, which forces the country to invest in its positioning in the international arena.

There is no single concept and strategy for the country's brand development, since each has its own exclusivity: stages of development, unique conditions of existence and motivation for promoting the image. Nevertheless, for all without exception, the problem of nation brand to a certain extent affects the strategic development of the state, its success and competitiveness in the modern realities of international politics and economics⁴.

The definition of «tourist brand» is connected with the understanding of the term «brand» itself. In a word, “a brand is a name along with a trademark”, because it is “a guarantee of authenticity and a reliable guarantee of quality”⁵. It is believed that «a brand should always be useful because it maintains an ongoing relationship with its customers

¹ Anholt, Simon (1998) 'Nation-Brands of the Twenty-First Century', *Journal of Brand Management*, 5: 6, pp. 395-406.

² Kotler, Philip, Jatusripitak, Somkid and Maesincee, Suvit (1997) *The Marketing of Nations. A Strategic Approach to Building National Wealth*, New York: The Free Press. pp. 111-159.

Cerny, Philip (2010) 'The Competition State Today: From Raison d'Etat to Raison du Monde', *Policy Studies*, 31: 1, pp. 5-21.

³ Kotler, Philip, Haider, Donal and Rein, Irving (1993) *Marketing Places. Attracting Investment, Industry, and Tourism to Cities, States, and Nations*, New York: The Free Press.

⁴ Anholt, Simon (2007) *Competitive Identity. The New Brand Management for Nations, Cities and Regions*, London: Palgrave Macmillan. P. 9.

⁵ Batey, Mark (2008) *Brand Meaning*, London: Routledge. P. 3.

and users»⁶, since «a brand is a promise that connects a product or service with a consumer, because it is associated with imaginary associations (words, images, emotions, or any combination of them) that come up when you think or hear about something»⁷.

The researchers also emphasize that “a brand is a product, service, or organization considered in conjunction with a name, identity, and reputation”⁸. Thus, a country’s tourism brand is a set of associations, emotions or signs that come to mind when a particular product, service or country is called.

Experts identify areas in which tourism is an effective tool of global policy.

Tourism can become a tool for entering the global market. The development of the sphere has allowed many developing countries to find their place in the global market. Clear examples are Spain, China, Turkey, Egypt, and Thailand. The development strategy has increased the investment attractiveness of the country, allowing for the investment of attracted funds in related sectors of the economy⁹ as a result.

The tourism industry, having received serious state support, is able to become a locomotive that will move the entire economy forward¹⁰.

THUS, A COUNTRY’S TOURISM BRAND IS A SET OF ASSOCIATIONS, EMOTIONS OR SIGNS THAT COME TO MIND WHEN A PARTICULAR PRODUCT, SERVICE OR COUNTRY IS CALLED.

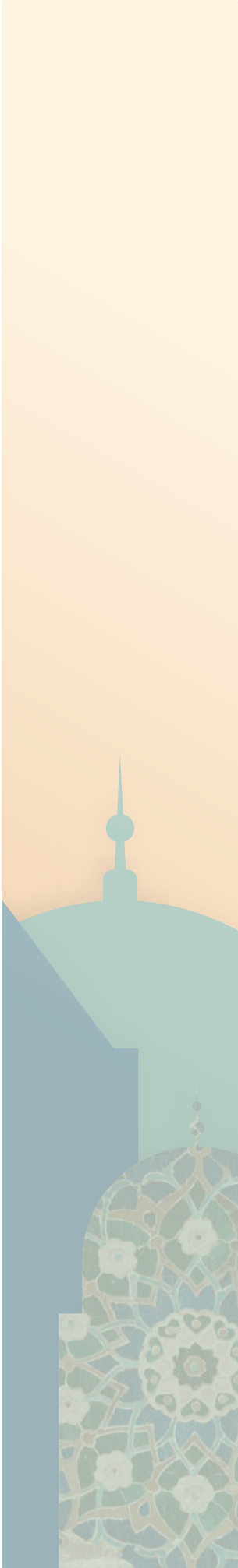


⁶ Randall, Geoffry (1997) Branding, London: Kogan Page Limited.P. 10.

⁷ Adamson, Allen (2006) Brand Simple. How the Best Brands Keep it Simple and Succeed, New York: Palgrave Macmillan. P.3.

⁸ Anholt, Simon (2007) Competitive Identity. The New Brand Management for Nations, Cities and Regions, London: Palgrave Macmillan. P.4.

⁹ Novichkov, Nikolai. Tourism as a factor in global politics. Journal Russia in Global Affairs. No. 3, 2016. Access mode: <https://globalaffairs.ru/articles/turizm-kak-faktor-globalnoj-politiki/>.



The development of the industry involves a policy of openness, ensuring security measures and improving the quality of services provided to tourists. Ultimately, these measures improve the image and investment ratings of countries, stimulating economic growth¹¹.

Creating a country's tourism brand is a resource-intensive process that requires not only the creativity of performers and the mobilization of funds, but also the transmission of humanitarian values. During the economic crisis, tourism, as an activity for receiving and consuming impressions, falls into the risk zone¹². However, as experts note, "if a state seeks to be represented on the global agenda and promote a certain system of values on the world stage, then the first step is the massive "importation" of tourists so that they can absorb the ideas and meanings that the country intends to export"¹³.

¹⁰ Kopiev, Vyacheslav. Roadmap of anti-crisis strategy. *Journal Russia in Global Affairs*. No. 2, 2009. Access mode: <https://globalaffairs.ru/articles/dorozhnaya-karta-antikrizisnoj-strategii/>.

¹¹ Ibid.

¹² Novichkov, Nikolai. Tourism as a factor in global politics. *Journal Russia in Global Affairs*. No. 3, 2016. Access mode: <https://globalaffairs.ru/articles/turizm-kak-faktor-globalnoj-politiki/>.

¹³ Ibid.

UZBEKISTAN AS A TOURISM BRAND: STRATEGIES AND OPPORTUNITIES

Uzbekistan is a country with huge tourism and recreational potential. This is the homeland of relics that have been accumulated and preserved for centuries, valuable and rare monuments and historical data, "these are the golden rings of the tourist chain that closely connect the country with the cultures of the nations around the world"¹⁴. There are 8.2 thousand cultural heritage sites in Uzbekistan, of which 209 are a part of 4 museum cities - Ichan Kala in Khiva, the historical centers of Bukhara, Shakhrisabz and Samarkand - are included in the list of UNESCO World Heritage Sites¹⁵. There are 8 nature reserves, 2 natural and 1 national parks, 6 natural monuments, 11 wildlife sanctuaries, more than 50 water protection zones, about 350 cultural and entertainment facilities (museums, theaters, parks of culture and recreation), as well as many other tourism objects on the territory of the country¹⁶. Tourists from different countries should see all of this when visiting Uzbekistan.

The cardinal reform of the tourism sector began in 2016 as an integral part of large-scale transformations in the country after the renewal of state policy. It proceeds from the priority of the goals of the country's socio-economic development and promotes economic growth, which implies the formation of Uzbekistan as an attractive center of world tourism, the inclusion of the country in the most preferred tourist destinations on the world map¹⁷.

The transformation of tourism into a strategic sector of the economy is a priority task of the Development Strategy of New Uzbekistan (2022-2026). Uzbekistan has set a goal to enter the top 30 countries most visited by tourists¹⁸. One of the main tasks for the government is to increase the share of tourism in the country's gross domestic product to 5% (at the end of 2017 - 2.3%)¹⁹ and increase the number of tourists visiting the country to 10 million by 2025²⁰.

¹⁴ Мирзиёев Ш.М. Янги Ўзбекистон стратегияси [Матн] / Ш.М. Мирзиёев. - Тошкент: "O'zbekiston" нашриёти, 2021. Б.173.

¹⁵ Ibid.

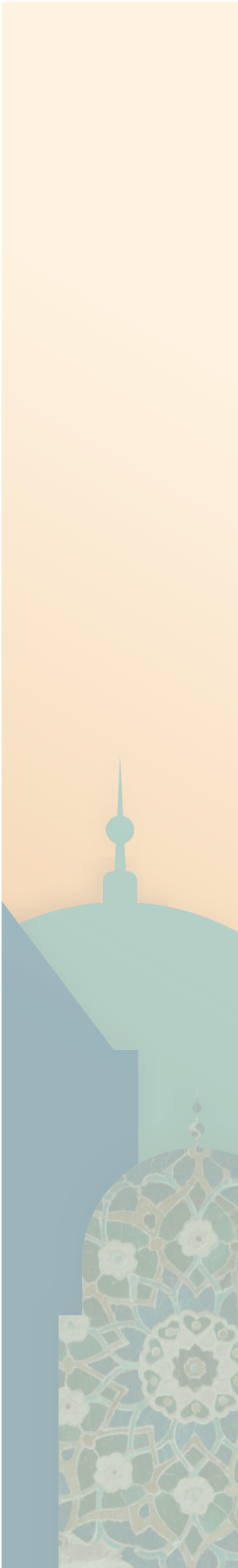
¹⁶ Abriev Z.S. Development of the socio-economic potential of tourism in Uzbekistan in the context of the COVID-19 pandemic: prospects for the future through the prism of the present // Economics, Entrepreneurship and Law. - 2022. - Volume 12. - No. 4. - doi: 10.18334 / epp.12.4.114360.

¹⁷ Mirziyoyev Sh.M. Yangi Uzbekistan strategy. B.172.

¹⁸ Mirziyoyev Sh.M. B. 176.

¹⁹ Decree of the President of the Republic of Uzbekistan UP-5611 «On additional measures for the accelerated development of tourism in the Republic of Uzbekistan». Access mode: <https://lex.uz/ru/docs/4143186#4149999>.

²⁰ Mirziyoyev Sh.M. B. 174.



The state sees the fulfillment of tasks through the implementation of the following measures:

- accelerated development of the tourism industry, improvement of the tourism management system.
- simplification of visa, licensing, and permit procedures.
- creating favorable conditions for foreign investment, actively attracting world brands, doing business.
- creation of new tourist routes, development of modern types of tourism, increasing their attractiveness²¹.
- promoting the full and effective use of regional tourism potential, the production of national tourism products and export to world markets.
- support for enterprises specializing in tourism services.
- launching flights of low-cost airlines, training and retraining of personnel for the industry²².

A review of the legislative framework shows that in 2018-2021, about 70 legal acts aimed at developing the tourism sector were adopted, the Concept for the development of the tourism sector in the Republic of Uzbekistan in 2019-2025 was approved, the Ministry of Tourism and Sports was formed on the basis of the Ministry of Physical Culture and Sports and the State Committee for Tourism Development. The Agency for Cultural Heritage was created within the structure of the Ministry (2021).

Uzbekistan's achievements in the field of tourism over the past 5-6 years are also reflected in the ratings of various international organizations.

- 2018**
- The country became the winner in the category «Gastronomic tourism» according to National Geographic Traveler.
 - «Lonely Planet» has included Uzbekistan in the list of the best destinations in Asia.
- 2019**
- According to UNWTO, Uzbekistan ranked **4th** among 20 countries with the fastest growing tourism industry.
 - In the ranking of the safest countries for solo travelers Solo Travel Safety Report, Uzbekistan has risen by 5 positions.
 - According to the «Research House of Asia Media», Uzbekistan is recognized as the country with the richest history in Asia.
 - At the Grandvoyage Tourism Awards ceremony in Madrid, Uzbekistan took **1st place** in the nomination «Best Developing Tourism Destination».
 - At the India's Best Awards ceremony, Uzbekistan was recognized as the best tourist destination in terms of cultural and historical heritage.

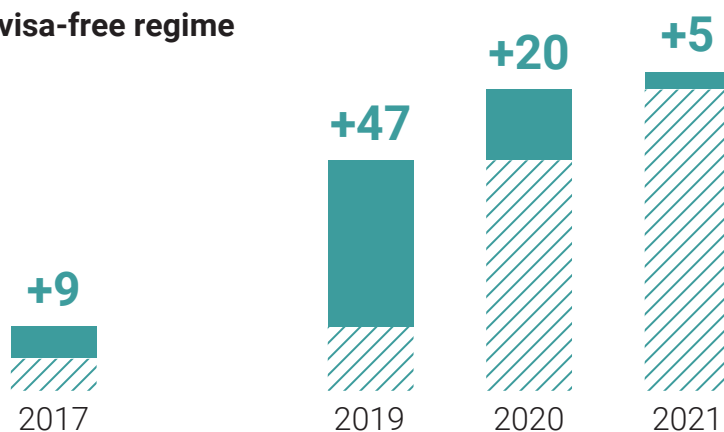
²¹ Mirziyoyev Sh.M. B. 173.

²² Mirziyoyev Sh.M. B. 172-173 b.

- 2019**
 - In the rating of halal tourism «Global Muslim Traveler Index» Uzbekistan entered the **top 20**; also ranked **8th** in the list of most convenient countries for Muslim women.
 - The Guardian included Uzbekistan among the 40 countries that are recommended to visit in 2019.
 - The New York Times included Uzbekistan in the list of the best travel destinations²³.
- 2020**
 - In the Halal Travel Frontier report, Uzbekistan is recognized as a country that initiated a new trend in the Muslim tourism market, restoring the Islamic heritage²⁴.
 - On the French portal Insurly, out of 180 states, Uzbekistan ranked **46th** in the world and first among the CIS countries in the rating of safety for tourism²⁵.
- 2021**
 - Tashkent city took **3rd** place in the annual report of the «Economist Intelligence Unit» «Worldwide Cost of Living»²⁶.
 - According to the Numbeo service statistics, Uzbekistan is recognized as a safe place for walking alone: the safety index at night is **66.24% (high)** and **80.56% (very high)** – in the daytime²⁷.

The number of states for whose citizens Uzbekistan has introduced a visa-free regime

90 countries in total



Source: Results of the implementation of the Action Strategy in five priority areas of development of Uzbekistan in 2017-2021. factbook. Nationwide Yuksalish movement, 2021

²³ Results of the implementation of the Action Strategy in five priority areas of development of Uzbekistan in 2017-2021. factbook. Nationwide Yuksalish movement. Access mode: https://yumh.uz/files/factbook_ru.pdf.

²⁴ Website of the State Committee for Tourism Development: <https://uzbektourism.uz/ru/news/view?id=1519>.

²⁵ Abriev Z.S. Development of the socio-economic potential of tourism in Uzbekistan in the context of the COVID-19 pandemic: prospects for the future through the prism of the present // Economics, Entrepreneurship and Law. - 2022. - Volume 12. - No. 4. - doi: 10.18334/epp.12.4.114360.

²⁶ EIU report Worldwide Cost of Living 2021. Available at: <https://pages.eiu.com/rs/753-RIQ-438/images/WCOL-free-report-V7.pdf>.

²⁷ Safety in Uzbekistan 2021. Numbeo. Available at: https://www.numbeo.com/crime/country_result.jsp?country=Uzbekistan.

The state stimulates the development of external and internal tourism to the fullest degree. In 2016, the number of countries for which a visa-free regime was introduced was 9, in 2021 this figure reached 90²⁸. 57 countries can obtain electronic visas, for citizens of 48 countries a procedure for visa-free entry for transit passengers has been introduced²⁹. The systems for issuing electronic visas (E-VISA) and temporary registration (E-MEHMON) have been launched. For some categories of foreign citizens, five new types of visas have been introduced: «Compatriot», «Student», «Academic», «Medical» and «Pilgrimage». Airports have «green» and «red» corridors. A new arrival terminal for passengers of international airlines was put into operation at the Tashkent International Airport. 24 passport control points with a capacity of up to 1200 passengers per hour allow to pass through passport control in 7-10 minutes³⁰. Previously, the passage of customs and border procedures at the airport in Tashkent was on average about two hours. An information and reference service has been created in the arrival's hall, where tourists can contact if questions and problems arise. Since 2018, it has become possible to purchase train tickets online using Visa, MasterCard, Maestro, JCB, Google Pay, American Express, UnionPay and Apple Pay international cards³¹. Also, the requirements for filling out the declaration have been simplified. In 2019, "tourist police" was created in the cities of Tashkent, Samarkand, Bukhara, and other cities to create a safe environment for the stay of foreign tourists.

UZBEKISTAN IS THE FIRST COUNTRY IN THE REGION TO START ISSUING IT VISAS FOR FOREIGNERS AS PART OF THE TASHRUSH RELOCATION PROGRAM.

Starting from April 1, 2022, IT visas have been issued for investors, founders of IT companies and IT professionals, as well as their family members. The validity of the visa is up to 3 years, with the possibility of unhindered entry and exit from Uzbekistan during the period of validity of the visa. The visa also provides for complete freedom of movement in Uzbekistan without the obligation to re-register, equal social conditions with citizens of Uzbekistan (obtaining education and medical services) and a simplified procedure for obtaining a residence permit.

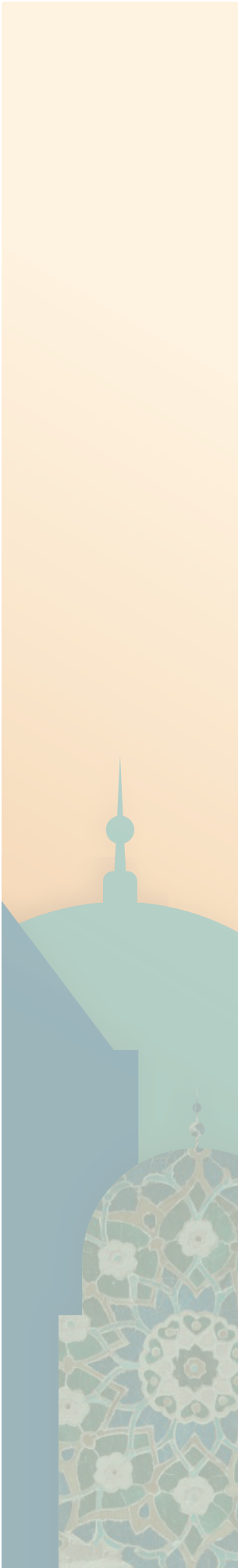
Holders of such a visa become residents of the IT park for which there are the following tax benefits and preferences:

²⁸ Results of the implementation of the Action Strategy in five priority areas of development of Uzbekistan in 2017-2021. factbook. Nationwide Yuksalish movement. Access mode: https://yumh.uz/files/factbook_ru.pdf.

²⁹ Ibid

³⁰ Passport control at the Tashkent airport can now be passed in 7 minutes (2018) Access mode: <https://kun.uz/ru/99765160>.

³¹ Official website of JSC «Uzbekiston temir yo'llari» Access mode: <https://e-ticket.railway.uz/lang-ru/pravila-ispolzovaniia.html>.

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1. Complete exemption from all types of taxes.
 2. Exemption from customs payments.
 3. Income tax rate - **7.5%**.
 4. Tax on dividends - **5%**.

The IT Park provides residents with a virtual office, payment of dividends and wages in foreign currency and exemption from obtaining a work permit for foreigners. According to reports, several large foreign IT companies have opened offices in Uzbekistan. Now they employ more than 5,000 specialists, and by the end of 2023 this figure should reach 10,000. Thanks to them, IT exports are expected to grow up to 100 million USD³². Since the beginning of 2022, over 3,000 specialists working for foreign companies have taken advantage of the program³³.

Now, it is difficult to imagine almost any region of Uzbekistan without tourists. Uzbekistan has hosted numerous events: A crafts festival in Fergana, a suzani festival in Navoi, a dance festival “Raqs sekri” (“Magic of Dance”) in Khorezm, sports competitions “Bahodirlar uyini” (“Games of Strongmen”), a pilgrimage forum in Bukhara, a festival bakhshi, an archaeological forum in Surkhandarya, the Muynak-2019 rally, the elements music festival in Karakalpakstan, the CIS tourism fair, the Geo-tourism forum in Kashkadarya, the Gastro Bazar gastronomic festival in Tashkent, the World Influencers Congress and the Electronic Music Festival³⁴.

Pilgrimage, gastronomy, health, MICE (Meetings, Incentives, Conferences and Events) and online tourism are areas of priority for the development of tourism. Uzbekistan is a country with many years of experience in providing pilgrimage, gastronomic, health and nature tourism services for domestic travelers. MICE/business, IT, and online tourism services, are completely new lines of business which are oriented primarily to external audiences.

The rich heritage of Uzbekistan allows for the expansion of internal and external pilgrimage tourism. The government concludes agreements on organizing special pilgrimage tours to Uzbekistan with foreign partners such as Pakistan and Turkey. Great attention is paid to the introduction of halal certification, training guides for halal tourism and the construction of halal hotels³⁵. According to statistics, in 2018-2019, the flow of tourists from Indonesia increased by 170%, tourists from Malaysia by 158%, from Turkey by 154% and Muslim tourists from the UAE by 153%³⁶.

³² A website about the relocation program and the issuance of visas for IT specialists was launched (2022). Access mode: <https://www.spot.uz/ru/2022/03/14/it-visa/>.

³³ Ibid

³⁴ Results of the implementation of the Action Strategy in five priority areas of development of Uzbekistan in 2017-2021. factbook. Nationwide Yuksalish movement. Access mode: https://yumh.uz/files/factbook_ru.pdf.

³⁵ Pilgrimage tourism has great potential in Uzbekistan (2019). Access mode: <https://isrs.uz/ru/ozbekiston-va-mo-oav-nigohida/palomniceskij-turizm-imeet-bolsoj-potencial-v-uzbekistane>.

³⁶ Website of the State Committee for Tourism Development: <https://uzbektourism.uz/ru/news/view?id=1519>.

A concept is being developed for the creation and development of a satellite television channel for pilgrimage tourism «Imam Bukhari», which will broadcast in languages including Indonesian, Bengali, Malay, Turkish, Arabic, Hindi, Urdu and Pashto, with the activities of the channel's correspondents in foreign countries already having been envisaged³⁷. For the development of domestic and pilgrimage tourism, in 2021 only, the flights «Fergana-Urgench-Fergana», «Termez-Urgench-Termez» and «Karshi-Urgench-Karshi», railway connections in the directions «Termez-Karshi-Khiva», «Khiva-Urgench-Nukus» and «Termez-Karshi-Samarkand», as well as increased the number of railway connections «Andijan-Khiva-Andijan»³⁸.



30%
– the share
of gastronomic tourism
in the total income
of the tourism industry

Source: The UN World
Tourism Organization
(UNWTO)

According to the UN World Tourism Organization (UNWTO), the share of gastronomic tourism in the total income of the tourism industry reaches 30%³⁹, and 79% of travelers make travel plans after studying the calendar of gastronomic events and national cuisine⁴⁰. The study showed that the national cuisine of every third tourist-growing state motivates travel - about 30% of the total cost will be spent on food⁴¹. In this regard, Uzbekistan is a paradise for gourmets. National cuisine abounds in meat, legumes, flour and bakery products and sweets. It has more than 100 types of pilaf, 70-80 types of soups, about 30 types of shish kebab (skewered meat)⁴², more than 57 samosa⁴³ recipes and a large number of bread types. The culture and tradition of cooking pilaf was included in the UNESCO Representative List of the Intangible Cultural Heritage in 2016⁴⁴. In 2017, the development of a gastronomic map of Uzbekistan was launched, which allows the traveler to independently make gastronomic tours in the regions of the country.

³⁷ Decree of the President of the Republic of Uzbekistan «On measures for the further development of domestic and pilgrimage tourism in the Republic of Uzbekistan» (2021). Access mode: <https://mintrans.uz/ru/news/o-zbekiston-respublikasida-ichki-va-ziyorat-turizmini-yanada-rivojlantirish-chora-tadbirlari-to-g-risida>.

³⁸ Ibid

³⁹ II International Gastronomic Festival «Gastro Bazaar-2019» (2019). Access mode: <https://www.uzdaily.uz/ru/post/45438>.

⁴⁰ Ibid

⁴¹ Ibid

⁴² Gastronomic map of Uzbekistan. Access mode: <http://micesolutions.uz/ru/news/1305.html>.

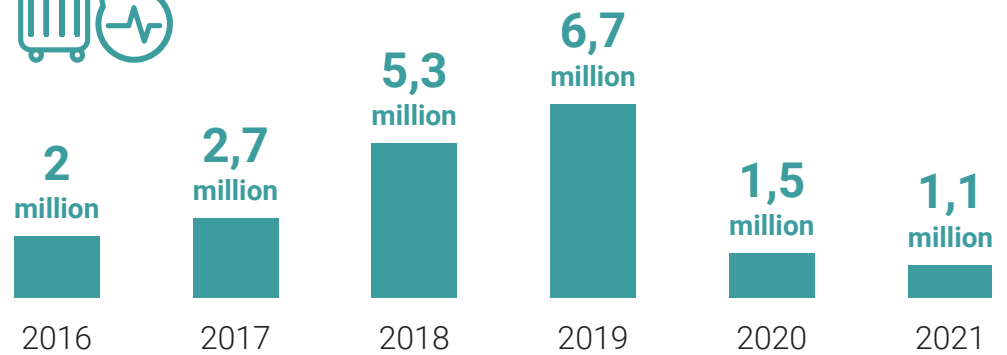
⁴³ Fayzieva, Sayyora. Prospects for the development of gastronomic tourism in Uzbekistan. Access mode: <https://cyberleninka.ru/article/n/perspektivy-razvitiya-gastronomicheskogo-turizma-v-uzbekistane>.

⁴⁴ Pilaf comes first! Access mode: <https://uzbekistan.travel/ru/o/plov-vsemu-golova/>.

The Gastro Mahalla project is working in test mode. In the mahallas of Tashkent and Bukhara, located on popular tourist routes, family businesses have been created to introduce tourists to the traditions of preparing Uzbek dishes at home and to promote the sale.



Number of foreign tourists visiting Uzbekistan



Source: Results of the implementation of the Action Strategy in five priority areas of development of Uzbekistan in 2017-2021. factbook. Nationwide Yuksalish movement, 2021

The global pandemic has made adjustments, sharply reducing the number of tourists. According to the Ministry of Tourism and Cultural Heritage, in the first 9 months of 2021, 1.1 million tourists visited Uzbekistan, and the tourism business earned 273 million USD⁴⁵. From 2016 to 2019 in pre-pandemic times, the number of tourists increased 3 times - from 2.03 million (2016) to 6.7 million people (2019).

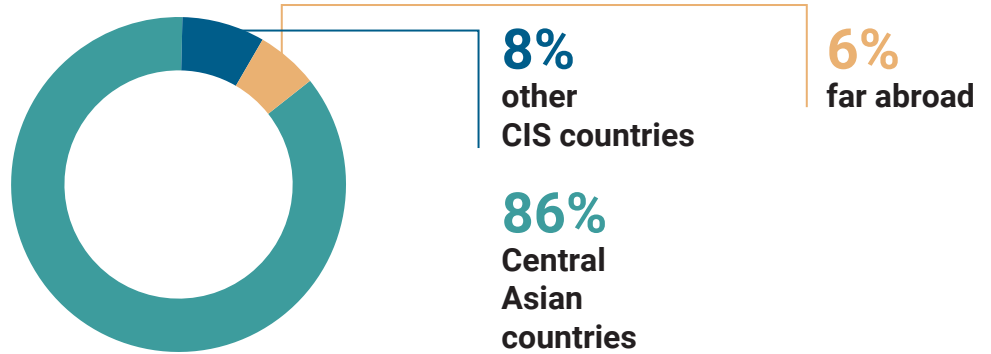
Over the same period, the number of visitors from Central Asian countries increased by an average of 22-25% per year, while the annual increase among tourists from non-CIS countries was 50%⁴⁶. According to statistics, in terms of the number of tourists among the countries of Central Asia, the highest rates were observed in 2018-2019. In the regional context, Kazakhstan is traditionally the leader, with 2.293 million Kazakh tourists in 2018 and 2.261 million in 2019), 1.095 million Tajik tourists in 2018 and 1.473 million in 2019 and– 1.055 million Krgyz tourists in 2018 and 1.454 million visitors in 2019⁴⁷. In the pandemic years, 2020-2021, the number of visitors from these countries has declined sharply, however, the region still remains the main destination that forms the tourist flow to Uzbekistan. Kazakhstan, Kyrgyzstan, and Tajikistan are the unchanging leaders in terms of the number of tourists for 2018-2021.

⁴⁵ Aziz Abdulkhakimov: Tourism is a strategic sector of the economy (2021). Access mode: <https://kursiv.kz/news/kursiv-guide/2021-04/aziz-abdulkhakimov-turizm-yavlyaetsya-strategicheskoy-otraslyu-ekonomiki>.

⁴⁶ Development of tourism in Uzbekistan: an overview of the tourism industry for 2016-2020 (2021). Access mode: <https://e-cis.info/news/566/92213/>.

⁴⁷ Official website of the Ministry of Tourism and Cultural Heritage of the Republic of Uzbekistan. Access mode: <https://uzbektourism.uz/research/statistics>.

Regions from which the main flows of international tourists are directed to Uzbekistan (2018-2021)



Source: State Committee for Tourism of the Republic of Uzbekistan, 2018-2021

The most preferred routes among Central Asian tourists are the directions “Osh-cities of the Ferghana Valley-Tashkent-Samarkand-Bukhara-Khiva”, “Bishkek-Tashkent-Samarkand-Bukhara-Khiva», «Seven lakes-Penjikent-Samarkand-Bukhara» and «Turkestan-Tashkent-Samarkand-Bukhara».

Since the beginning of 2021, Uzbekistan has been opening its doors to foreign tourists, gradually lifting covid restrictions and making efforts to jointly expand transport and logistics routes in the region. At the tourism forum of the Heads of Tourism administrations of the SCO member countries, Minister A. Abdukhakimov announced the intensification of work with border countries to expand combined routes in the Central Asian region⁴⁸.

To restore the achieved level of tourist flow in 2020, the project “Uzbekistan. Safe travel guaranteed” was launched. The project is a new system of sanitary and epidemiological safety for tourists based on world standards. Certification of tourism facilities and related infrastructure and tourism services based on new sanitary and hygienic requirements has become mandatory for:

- State border checkpoints.
- Air, railway, and bus stations.
- Objects of material cultural heritage, museums, theaters, etc.⁴⁹.

The system provides financial compensation for travelers in the case of infection with COVID-19 in Uzbekistan. In 2020, a platform was created offering virtual trips around the country. It is designed to increase the flow of tourists in post-pandemic times, as it allows foreign travelers to plan routes around Uzbekistan in advance.

⁴⁸ Uzbekistan will launch a tourist route with the Central Asian countries - Abdukhakimov. Access mode: <https://uz.sputniknews.ru/20220520/uzbekistan-zapustit-turisticheskiy-marshrut-so-stranami-tsa--abduxakimov-24685327.html>.

⁴⁹ Ibid

It is noteworthy that before the pandemic, as a result of the implementation of the Travel to Uzbekistan program, there was an increase in domestic tourist flow. In 2019, there were 14.7 million domestic tourists in the republic, in 2020 the figure decreased to 1.8 million people⁵⁰, and in 2021 the number increased to 7.5 million⁵¹. When buying tour packages within the republic, travelers and their families can count on a discount of up to 50%. Moreover, new types of recreation are being considered to promote domestic tourism during the pandemic restrictions. Active recreation is implemented by the Hiking Tourist Route project (city walking, health path, trekking and hiking), aimed at improving the health of citizens.

From 2016-2019 the volume of exports of tourism services increased 10 times and reached 1.3 billion USD⁵². If, in 2016, the number of tour operators was 484, then by 2020 this figure increased by 3.2 times and amounted to 1346⁵³. To support entrepreneurship and business in the field of tourism by the end of 2021, the following benefits and preferences have been preserved:



Reduction of the income tax rate by 50% of the established rates for tour operators, travel agents, as well as accommodation facilities.



Partial subsidizing of the costs of tour operators for air and railway tickets in the amount of 30% of the cost, subject to the organization of a tour to the Republic of Uzbekistan for foreign tourist groups of at least 10 people and their stay for at least five nights in accommodation facilities.



For tour operators, travel agents and tourism entities providing hotel services (accommodation services): exemption from payment of land tax from legal entities and property tax of legal entities; establishing the payment of social tax at a reduced rate of 1%⁵⁴.

In 2021, the amount of funds allocated from the state budget for the development of the industry amounted to 1 trillion UZS (100 million USD)⁵⁵. In the first 9 months of 2021, 105 new hotels and 1,001 family guest

⁵⁰ Aziz Abdulkhakimov: Tourism is a strategic sector of the economy (2021). Access mode: <https://kursiv.kz/news/kursiv-guide/2021-04/aziz-abdukhakimov-turizm-yavlyaetsya-strategicheskoy-otraslyu-ekonomiki>.

⁵¹ Development of tourism in Uzbekistan: an overview of the tourism industry for 2016-2020. Access mode: <https://e-cis.info/news/566/92213/>.

⁵² Aziz Abdulkhakimov: Tourism is a strategic sector of the economy (2021). Access mode: <https://kursiv.kz/news/kursiv-guide/2021-04/aziz-abdukhakimov-turizm-yavlyaetsya-strategicheskoy-otraslyu-ekonomiki>.

⁵³ Ibid

⁵⁴ Decree of the President of the Republic of Uzbekistan «On measures for the further development of domestic and pilgrimage tourism in the Republic of Uzbekistan» (2021). Access mode: <https://mintrans.uz/ru/news/o-zbekiston-respublikasida-ichki-va-ziyorat-turizmini-yanada-rivojlantirish-chora-tadbirlari-to-g-risida>.

⁵⁵ Aziz Abdulkhakimov: Tourism is a strategic sector of the economy (2021). Access mode: <https://kursiv.kz/news/kursiv-guide/2021-04/aziz-abdukhakimov-turizm-yavlyaetsya-strategicheskoy-otraslyu-ekonomiki>.

houses were launched. As a result, the number of hotels in the country reached 1,361, the number of rooms 31,388, and family guest houses 2,365 units. Also, 1,015 toilets were built and repaired⁵⁶. In 2022, it is planned to re-launch 636 accommodation facilities, 80 tourist organizations and create an additional 4.5 thousand jobs⁵⁷.

There are 5 higher educational institutions in the field of tourism in the country, annually graduating more than 500 students with a bachelor's degree, and more than 40 students with a master's degree, more than 3.5 thousand personnel graduate from 12 specialized professional college⁵⁸. From the 2021-2022 academic year, the International University of Tourism and Cultural Heritage «Silk Road» (Samarkand), Tashkent State University of Economics, Bukhara and Termez State Universities opened master's degree programs in the areas of «pilgrimage tourism», «transport logistics» and «creative industry»⁵⁹.

Recently, Uzbekistan has achieved positive results in the implementation of the tourism development strategy. Despite the difficulties with the pandemic, the country is looking for ways to adapt to new realities, minimizing the risks and losses associated with global restrictions.

DESPITE THE DIFFICULTIES WITH THE PANDEMIC, THE COUNTRY IS LOOKING FOR WAYS TO ADAPT TO NEW REALITIES, MINIMIZING THE RISKS AND LOSSES ASSOCIATED WITH GLOBAL RESTRICTIONS.



⁵⁶ Over 1.1 million tourists visited Uzbekistan in nine months (2021). Access mode: <https://podrobno.uz/cat/podrobno/uzbekistan-za-devyat-mesyatsev-posetili-svyshe-1-1-milliona-turistov-/>.

⁵⁷ Ibid

⁵⁸ Ibragimova, Naila. Yakubov, Nurbek. Increasing the role of tourism as an important sector of the economy of Uzbekistan (2021). Institute for Forecasting and Macroeconomic Research. Access mode: <https://ifmr.uz/publications/articles-and-abstracts/tourism>.

⁵⁹ Decree of the President of the Republic of Uzbekistan «On measures for the further development of domestic and pilgrimage tourism in the Republic of Uzbekistan» (2021). Access mode: <https://mintrans.uz/ru/news/o-zbekiston-respublikasida-ichki-va-ziyorat-turizmini-yanada-rivojlantirish-chora-tadbirlari-to-g-risida>.

PROBLEMS AND SOLUTIONS

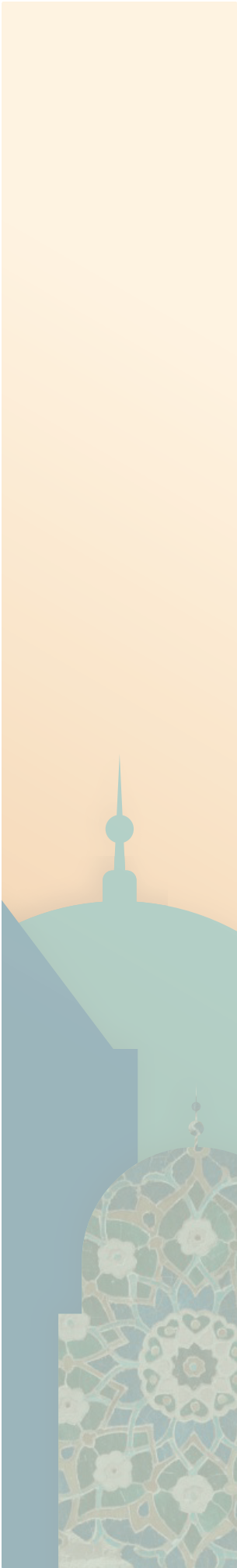
The development of tourism directly depends on the effectiveness of decisions made and implemented at several levels. Top-level decisions include the adoption of development strategies, concepts, road maps, improvement of the regulatory framework, the adoption of comprehensive programs and priority measures, the creation of effective mechanisms and institutions that achieve the intended goals. Decisions of the lower level are connected with the top one: they can be either individual decisions, initiatives, ideas at the local level, or additional support for the ongoing state policy.

Uzbekistan is rapidly solving top-level problems. The political will of the leadership of the republic and openness to changes made it possible to direct the tourism sector in one direction. A study of the experience of foreign countries shows that the long-term absence of a unified policy and strategy in the country in the field of tourism is considered an urgent problem hindering the development of this sector⁶⁰. The New Uzbekistan Strategy clearly outlines the work that needs to be done to solve the existing problems:

- Improvement of the regulatory framework, the introduction of international norms and standards aimed at creating favorable conditions for the development of tourism.
- Development of tourism and related infrastructure in the regions of the country, considering the needs and requirements of travelers.
- Development of transport logistics, expansion of external and internal routes, improvement of the quality of transport services.
- Reducing the influence of seasonal factors due to the diversification of tourism products and services for different segments of the tourism market.
- Development of domestic tourism, providing stimulation of the activities of tourism entities aimed at meeting the demand for tourism services in the country.
- Promotion of tourism products of Uzbekistan in the domestic and foreign markets, strengthening the image as a safe country for travel and recreation.
- Improvement of the system of training highly qualified specialists, retraining and advanced training of service personnel.
- Creation of a network of dry closets (bio toilet), establishment of a car rental service (Rent a Car), creation of special economic zones for the development of tourism, continuation of work on the accelerated development of new promising types of industry.
- Business support in the organization of services in the tourism cluster, tourist areas, and the tourism industry⁶¹.

⁶⁰ Pilgrimage tourism has great potential in Uzbekistan (2019). Access mode: <https://isrs.uz/ru/ozbekiston-va-mo-oav-nigohida/palomniceskij-turizm-imeet-bolsoj-potencial-v-uzbekistane>.

⁶¹ Mirziyoyev Sh. M. 175-176 b.



The need to continue work on the inclusion of historical and cultural heritage sites in tourist routes is also noted. Out of the 8.2 thousand cultural heritage sites, only 500 are included in the tourist routes. It is planned to bring this figure up to 800⁶².

The traveler should be comfortable in the host country. The journey begins with the desire of the tourist to visit a particular country. The availability of high-quality, reliable, and accessible information in one place, the ease of booking tickets, hotels, permission to attend various events and other documents, the presence of electronic routes, maps, applications in the information space allow the tourist to imagine a trip in advance. The digitalization of services can not only answer questions in advance, but actually makes the country “open”, creates a lot of opportunities for potential visitors. Moreover, the digitalization of services can completely eliminate the lack of information, replace paper brochures, information materials, maps, etc., which are familiar to the tourism sector. This is useful not only for foreign tourists, but also for domestic ones, who may not have an idea about the sights at home.

The next equally important issue is the provision of high-quality and inexpensive (tourist-oriented - author’s note) international and domestic transport links. The strategy notes that an important factor in the development of regions is the provision of transport links between them. It is planned to create an interconnected transport network from all settlements, towns and villages to the capital, major cities, and tourist centers⁶³.

Since the beginning of 2021, active work has been underway to improve NAC Uzbekistan Airways and Uzbekistan Airports. The plans for the next five years include the transformation of Uzbekistan Airways «into the largest, strongest, most developed, with the largest number of aircraft, flights, passenger traffic in the region»⁶⁴. The updated business strategy of the company assumes a hybrid service model, according to which part of the flights will be carried out on the principle of a full-service carrier, and part on the basis of a low-cost carrier⁶⁵. HumoAir is already providing services on the Uzbek market - the «popular transportation carrier» of domestic flights at «significantly cheaper rates»⁶⁶. The company plans to enter the Central Asian market in the future. Also, Uzbekistan Airports intends to create a regional subsidiary Silk Avia in 2022, which organizes domestic transportation not only on the point to hub principle (from the capital to the regions), but also on the point-to-point model (between regions)⁶⁷.

⁶² Mirziyoyev Sh. M. B. 174.

⁶³ Mirziyoyev Sh. M. B. 169.

⁶⁴ “If we don’t increase the number of aircraft, we can give up the market” - Deputy Prime Minister (2020). Access mode: <https://www.gazeta.uz/ru/2020/02/13/aircrafts/>.

⁶⁵ Uzbekistan Airways is moving to a new business model. Major changes (2021). Access mode: <https://www.gazeta.uz/ru/2021/04/19/uzbekistan-airways/>.

⁶⁶ Humo Air official website: <http://humo-air.ru/>.

⁶⁷ The official page of Uzbekistan Airports in the Telegram network: <https://t.me/uzbairportsuz>.

The plans include the development of up to 40 routes and the purchase of regional aircraft with a passenger capacity of up to 70 people, with tariffs comparable to railway ones⁶⁸.

Also, the development of roadside infrastructure along tourist routes is very important. This is a necessary condition for the comfortable movement of tourists who prefer road trips. Modern roadside infrastructure is often limited to road service facilities - gas stations, sanitary facilities, food outlets and small trade. They are located in a chaotic manner, near settlements or places where there is a traditional congestion of passengers. The uneven location of infrastructure facilities worsens the quality of road services. It is necessary to implement a project for the organized placement of a roadside service complex at the level of roads of republican significance. These complexes may include not only traditional service facilities (gas stations, cafes, toilets, mini markets, etc.), but also permanent fairs of local (regional) goods, souvenir shops, large supermarket chains, etc.

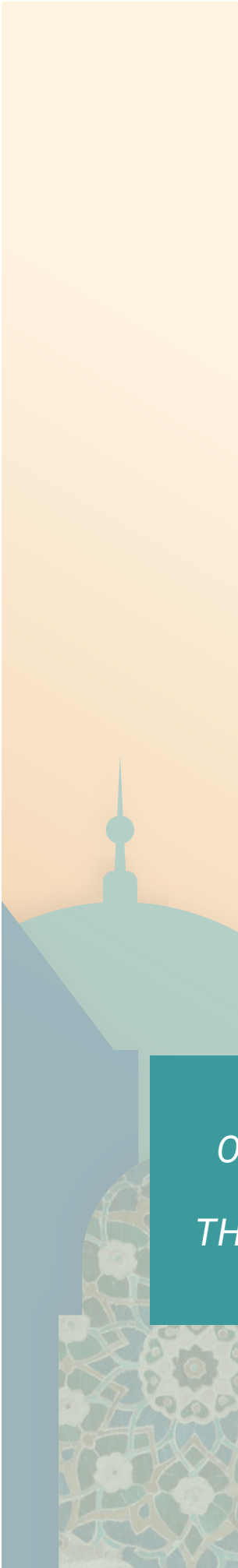
Development of the tourism sector is closely related to the solution of problems at the grassroots level. 90% of tourist organizations in Uzbekistan are in the private sector. This allows to create a competitive environment, diversify the number of market participants and their services. It can be stated that the level of service provided by private business is growing every year, but it does not reach international standards.

THE SPHERE NEEDS TO UNIFY THE QUALITY OF TOURISM SERVICES. IT IS NECESSARY TO DEVELOP COMMON STANDARDS FOR HOTELS, INNS, GUEST HOUSES, CATERING AND TOURIST SERVICES FOR VARIOUS SEGMENTS SEPARATELY.

Large and medium-sized hotels in Uzbekistan, especially in Tashkent and Samarkand, have sufficient resources to host business events, conferences, symposiums, seminars, and other international events. However, as practice shows, only the largest hotels use this potential during large-scale events of national importance. Uzbekistan's location in the heart of Central Asia could play an important role in turning Uzbekistan's major cities into a MICE/business travel hub. Promotion of the tourism brand of Uzbekistan as a regional hub for event tourism needs more support from the state.

Hotels with the necessary infrastructure for holding various events can develop special packages for organized business trip. A special all-inclusive service can be developed by each hotel separately,

⁶⁸ Ibid



starting from agreements with companies organizing various events, ending with the provision of a full range of services up to exclusive services at the request of the customer. For its part, the state should introduce mechanisms for additional incentives for hotels organizing such events for business tourists. The development of common standards and requirements for the quality of the organization of international events will establish minimum requirements for the quality of services provided by hotels, while leaving room for creativity and imagination of the host to maintain competition in the market.

Competent state policy solves problems at the top level, creating comfortable conditions for a traveler to stay in the country. Eliminating low-level problems leaves the tourist with a pleasant experience. This can be the implementation of initiatives and ideas for the arrangement of guest houses, restaurants and other buildings in the regions, the preparation of menus, the enrichment of cultural and entertainment programs, considering local specifics and traditions, the development of tourism applications and start-ups. In a word, from service and maintenance to innovative activity of citizens.

Last, but not least, is the inaccessibility of high-quality and systematic statistics, open data, and published studies on the tourism sector. Lack of information greatly hinders research in this area, limits the results of these studies to general conclusions and recommendations that are poorly integrated with reality. On the other hand, the availability of complete and reliable information is no less important for practitioners - market analysts, local and foreign travel companies, consulting agencies and other participants in the field. It is important to provide high-quality statistical data to form a complete picture: the level of demand for tourism services and tourism products, profiling foreign and domestic tourists, studying their needs and preferences, and much more. The problem can be solved under the guidance of specialized state institutions.

THE OFFICIAL WEBSITE OF THE MINISTRY OF TOURISM AND CULTURAL HERITAGE COULD BECOME A UNIFIED INFORMATION SYSTEM THAT WILL PROVIDE THE LATEST AND RELEVANT INFORMATION IN THE PUBLIC DOMAIN.

The available information will allow to study processes more deeply, observe changes and make more accurate forecasts. Every year, new types and directions of tourism appear on the international market, competition is growing, both between the «old» participants and between the «new» ones. Involving the private sector in the process of promoting tourism involves providing it with all the necessary information for doing business.



CONCLUSIONS AND RECOMMENDATIONS

For Uzbekistan, tourism is a strategic direction for the development of the economy in the post-pandemic future. The country can take its place on the tourist map of the world, offering a unique cultural and historical heritage, rich national traditions, beautiful nature, and excellent cuisine.

We offer the following recommendations for strengthening and promoting the tourism brand of Uzbekistan:

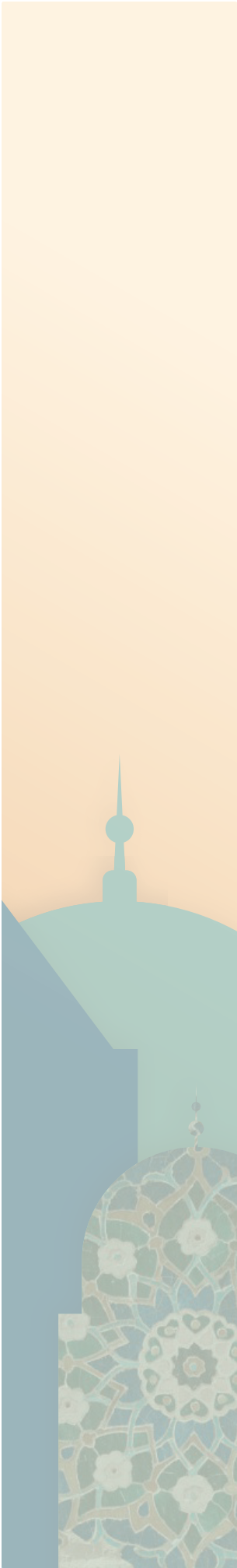
In the field of PR:

Tourism brand of Uzbekistan should be based on low availability and high quality of services. Creating a “digital tourism image” of the country can make Uzbekistan more open, accessible, and a preferred travel destination. Completion of work on the creation of pilgrimage and gastronomic maps of Uzbekistan, the construction of various routes for independent travelers, wide and accessible digitalization of services, can allow a potential tourist to independently plan a trip. The early launch of the official website of the Ministry of Tourism and Cultural Heritage with the necessary up-to-date information can become a «navigator» for the tourist, creating the opportunity to get all the necessary information in one platform. Also, it is necessary to provide high-quality, systematized, and up-to-date statistical information and open data on the website of the ministry to provide the necessary information for researchers, analysts, and market participants.

In the field of logistics:

An increase in the number of international and domestic flights due to the commissioning of low-cost airlines and the liberalization of prices (primarily) for international flights will reduce the traveler's delivery time from «prospective» Europe, Asia, Russia, etc. and increase the competitiveness of Uzbekistan on the world tourism map.

The countries of Central Asia are important for the development of tourism in Uzbekistan. Kazakhstan, Tajikistan, and Kyrgyzstan are leaders in terms of the number of foreign tourists over the past 5 years. Despite the impressive figures, a scheme of tourist routes has not yet been developed, both between the two countries and within the region. Tourists are guided by already «tested», well-known routes. Interdepartmental cooperation in this direction can return the statistics on the tourist flow to the pre-pandemic level, open up new routes, and establish transport links between these points.



To improve service along tourist routes, it is necessary to develop and implement state projects for the development of roadside infrastructure facilities. The creation of integrated service areas can be carried out through public-private partnerships, the provision of soft loans for the acquisition of land and / or construction of facilities, tax exemptions for a certain period and the provision of other tax and other incentives for businesses. In the development of small tourism businesses, the role of khokimiyats - local authorities, is important. They can also assist private businesses in simplified rental of premises, paperwork for the provision of tourism services, etc. in roadside infrastructure.

In the field of digital services:

Uzbekistan is focusing on training highly paid personnel with complex skills. Support for start-ups and innovative solutions in the field of tourism will provide travelers staying in the country with a more comfortable pastime. For example, developing a taxi call application without connecting a local SIM card and the Internet can make it much easier for a traveler to call a taxi from the airport to the hotel and back.

In a pandemic, domestic tourism can be activated with additional incentives. The introduction of the tourist cashback program - the return of part of the funds from the cost of a trip for a vacation in Uzbekistan, will reduce the cost of tourist services and serve as an incentive for the domestic traveler. The program can be implemented to increase the number of travelers in the non-tourist season for recreation. Thanks to such a promotion, the tourism industry can receive additional income in the «dead» season, traditionally free from tourists.

Conceptually:

In the long run, tourism is about translating values, i.e., what we want to pass on to the outside world and to future generations. The image of modern Uzbekistan is a “creative state”, whose actions are not entirely based on the logic of monetization (this is relevant, only to achieve short-term goals), but sets the goal of preserving the material and cultural heritage of the country. When a country wants to transmit values, efforts must be made both at the top and bottom levels. Only joint work will achieve a positive result.

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