

ANALYSIS OF THE EFFECTIVENESS OF THE TOURISM INDUSTRY OF UZBEKISTAN AND CHARACTERISTICS OF COMPETITIVENESS

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Abstract

In this article, the factors and indicators affecting the efficiency of the tourism industry in Uzbekistan are analyzed. Also, the impact of tourism destination indicators on the competitiveness of the tourism industry has been studied.

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Introduction.

After the "Covid-19" pandemic, the New Uzbekistan Development Strategy will be implemented in accordance with the "Concept of the Development of the Tourism Sector in the Republic of Uzbekistan".¹ In accordance with this concept, programs aimed at restoring the development trends of the country's national tourism industry and increasing its global competitiveness is being consistently continued. According to this concept, until 2025, the share of the tourism industry in the country's GDP will increase to 5.0%, and the export of tourist services will increase to 2.2 billion up to USD, it is planned to increase the volume of tourist flow from 10.0 million, including the number of foreign tourists visiting our country from 3.0 million.² This situation will help to develop the tourism industry in our country in the following years, improve the position of the national tourism industry in the market of international tourist services, and increase its competitiveness and indicates that priority is given to improvement.

Until today, as a result of the implementation of the "Concept of Development of the Tourism Sector" in our country, in the major cities of the republic such as Tashkent, Samarkand and Bukhara, "Marriott", "Hampton by Hilton" and "Hyatt Regency" facilities designed to provide quality hotel services for tourists were commissioned. In particular, in 2022, the opening of the tourist complex "Silk Road Samarkand" took place in the city of Samarkand. At the same time, within the framework of the concept, 29.4 billion will be allocated to the development of tourism services. 117.3 billion soums for the improvement of cultural heritage objects. 43.0 billion soums to support museums. 73.1 billion soums for tourism educational institutions. soums of financial resources were directed.³

¹ Appendix 1 to the decree of the President of the Republic of Uzbekistan "On additional measures for the rapid development of tourism in the Republic of Uzbekistan" No. PF-5611. 05.01.2019 <https://lex.uz/docs/4143188>

² Appendix 1 to the decree of the President of the Republic of Uzbekistan "On additional measures for the rapid development of tourism in the Republic of Uzbekistan" No. PF-5611. 05.01.2019 <https://lex.uz/docs/4143188>

³ Development of the field of placement tools in Uzbekistan. Tashkent International Tourism Fair 2023. <https://titf.uz/uz/foydali-malumotlar/o-zbekistonda-joylashtirish-vositlari-sohasini-rivojlantirish/>

Materials and Methods.

The above-mentioned information is proof that extensive work is being carried out in the republic aimed at developing the national tourism industry and increasing its competitiveness. At this point, it is worth noting that the competitiveness of global travel and tourism in the cross-section of countries, including the development of the World Economic Forum (WEF) published annually information about Uzbekistan was not calculated in the rating evaluation of efficiency. Therefore, analyzing the efficiency of the national tourism industry on the basis of available data, it is necessary to determine its competitiveness.

Results.

Table 1. Distribution of foreign citizens who came to the Republic of Uzbekistan for tourist purposes by country, in thousand people

	Years							
	2015	2016	2017	2018	2019	2020	2021	2022
Total number of foreign citizens who came for tourist purposes	1917,7	2027,0	2690,0	5346,3	6748,5	1504,1	1881,4	5232,8
Including								
Azerbaijan	2,9	2,4	3,8	10,4	12,4	2,2	2,9	10,4
Afghanistan	18,4	19,2	23,4	44,2	62,6	20,1	34,0	3,0
Belarus	1,1	1,6	2,7	5,6	7,4	1,6	4,3	13,6
Germany	5,5	5,9	7,3	18,1	27,6	2,1	6,9	17,7
Israel	3,5	3,2	3,8	9,8	13,6	1,0	2,5	11,3
Iran	6,3	5,4	3,0	2,6	3,5	0,9	1,7	3,6
Italy	2,5	3,1	4,7	13,8	20,4	0,9	2,1	8,8
Kazakhstan	1250,8	1384,3	1752,2	2293,1	2261,1	424,1	565,3	1551,1
Kyrgyzstan	139,8	168,1	366,1	1055,7	1454,9	508,1	652,2	1356,9
China	11,8	11,8	15,1	32,5	54,3	7,2	3,6	5,4
South Korea	25,7	25,3	31,1	27,3	35,5	6,7	5,8	19,9
United Arab Emirates	4,8	5,1	5,0	1,5	2,4	0,7	1,8	2,1
Russia	113,3	106,9	130,0	371,6	455,5	81,6	190,5	567,7
Great Britain	1,8	2,0	3,0	7,9	16,0	1,4	4,0	10,5
USA	1,2	1,1	1,3	11,1	17,1	1,8	5,4	13,1
Tajikistan	212,4	169,0	206,6	1095,5	1473,7	337,5	288,3	1447,8
Turkmenistan	46,8	39,5	46,6	169,9	574,8	60,6	1,2	6,0
Turkey	36,3	39,7	48,3	41,3	63,5	21,0	44,2	75,6
Ukraine	2,2	0,6	0,7	11,7	14,0	3,2	8,7	11,0
France	3,5	4,7	5,6	13,5	20,4	1,0	3,4	11,0
Japan	2,3	3,0	4,0	17,0	24,9	1,4	1,0	3,1
Other countries	3,2	2,9	5,9	67,3	99,0	13,5	40,4	83,2

When analyzing the characteristics of the competitiveness of the national tourism industry, it is first necessary to analyze the information about the foreign tourists who came to the country. According to official statistics, in 2015-2019, before the "Covid-19" crisis, the number of tourists who visited our country for tourist purposes increased by 3.5 times, corresponding to 1.9 mln. 6.7 million per person. In 2019-2020, due to the "Lock Down" in the conditions of the corona virus pandemic, the country's foreign tourism development rate decreased by 4.5 times, and the rate of tourist flow into the republic

was 1.5 million persons. Due to the implementation of rapid measures aimed at mitigating the negative consequences of the corona virus pandemic in the republic, the volume of foreign tourist flow to our country will be restored in 2021 itself. And their number is about 1.9 million equaled to the figure of 2015. The number of foreign tourists who came to the republic for tourist purposes in 2022 due to the reforms implemented in the post-pandemic period to restore the flow of international tourism to our country Compared to 2021, it has increased by 2.8 times to 5.2 million persons. This figure is more than 77.5 percent of the pre-pandemic figure of 2019, and 97.9 percent compared to 2018.

Geographically, according to the structural analysis of the tourist flow entering the republic, there is a high share of tourists from near-qualified foreigners, including Kazakhstan, Kyrgyzstan, Russia, and Tajikistan. is considered At this point, it is worth noting that structural changes are taking place in the volume of foreign tourist flow to the republic during the period under study. For example, more than 65 percent of the tourists who visited our country in 2015-2017 corresponded to Kazakhstan, and the geographical composition of tourists visiting our country in the following years due to the expansion and increase in their number, the share of Kazakh tourists made almost 3/1 of the total number of tourists. Also, the number of tourists from countries such as China, Turkey, South Korea, Afghanistan, Kyrgyzstan and Tajikistan has increased. Despite these structural changes, 45.4 percent of foreign citizens who visited our country for tourist purposes in 2015-2022 came from Kazakhstan, 20.6 percent Kyrgyzstan accounts for 16.9%, Russia for 7.1%, and other countries for 10.0%.

Also, on average, 52.5% of foreign tourists who visited our country during the period under study are women. In 2015-2022, the share of male tourists among foreign tourists visiting our country increased by 4.5%, from 44.9% to 49.4%.

Table 2. Composition of tourists visiting Uzbekistan by touristic purposes

Indicators of tourist destinations		Years							
		2015	2016	2017	2018	2019	2020	2021	2022
Total number of tourists	in a thousand people	1917,7	2027,0	2690,0	5346,3	6748,5	1504,1	1881,4	5232,8
	in percent	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0
<i>Including,</i>									
Leisure and recreation	in a thousand people	166,8	175,5	203,7	458,1	1043,9	129,3	155,1	392,2
	in percent	8,7	8,7	7,6	8,6	15,5	8,6	8,2	7,5
Treatment	in a thousand people	55,7	27,1	28,7	52,5	55,6	15,0	32,4	69,9
	in percent	2,9	1,3	1,1	1,0	0,8	1,0	1,7	1,3
Eliminating relatives	in a thousand people	1555,7	1651,2	2272,4	4713,5	5520,7	1321,4	1613,1	4657,6
	in percent	81,1	81,5	84,5	88,2	81,8	87,9	85,7	89,0
Study	in a thousand people	10,3	6,2	6,9	14,6	21,4	4,7	6,4	8,8

	<i>in percent</i>	0,5	0,3	0,3	0,3	0,3	0,3	0,3	0,2
Regarding the service	in a thousand people	113,7	149,7	159,9	56,6	53,1	17,4	60,7	83,8
	<i>in percent</i>	5,9	7,4	5,9	1,1	0,8	1,2	3,2	1,6
For commercial purposes	in a thousand people	15,4	17,2	18,5	50,9	53,8	16,3	13,7	20,5
	<i>in percent</i>	0,8	0,8	0,7	1,0	0,8	1,1	0,7	0,4

The above-mentioned changes in the geographical and gender composition of foreign citizens who visited our country for tourist purposes are also related to the composition of tourist purposes and indicate that changes are taking place. According to the analysis of the goals of the tourist flow entering the republic, most tourists come to visit their relatives and friends. According to statistical data, the share of tourists who visited the republic in order to lose their loved ones in the total number of tourists during the analyzed period was on average 85.0 percent. The share of tourists who came for the purpose of leisure and recreation was 9.2 percent, and the number of tourists who came for business was 3.4 percent. At the same time, the number of tourists coming to our country to restore their health by using medical services will increase from 55.7 thousand to 69.9 thousand in 2015-2022. Despite the increase, as a result of a sharp increase in the volume of foreign tourist flows, the share of tourists who visited the republic for this purpose in the total volume of tourist flows decreased from 2.9 percent to 1.3 percent (See Table 2).

Discussion.

Also, according to the State Committee for Tourism Development of the Republic of Uzbekistan, tourists visiting our country for tourist purposes from Tajikistan (60 US dollars), Kyrgyzstan (100 US dollars), Compared to tourists from Turkmenistan (105 US dollars) and Kazakhstan (158 US dollars) from far abroad (710 US dollars) and other CIS countries (636 US dollars) The amount of tourist expenses made by the tourists is high. This situation allows changes in the geographical, sexual and tourist goals of the tourist stream visiting our country to develop the tourism industry and improve the global competitiveness of the national tourism industry can be a sufficient reason to conclude that it is giving.

In conclusion, it should be noted that the increase in the volume of foreign tourist flows to our country and the positive changes in its composition have changed the procedure for accounting and registration of foreign citizens in the republic. It is explained by the simplification and implementation of the electronic visa procedure. For example, in 2017, the number of countries with visa-free access to the republic was not even 10, but today visa-free access is available for 86 countries, 36 visa-free transit regimes for the country and citizens of 57 countries are allowed to issue an electronic entry visa.

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