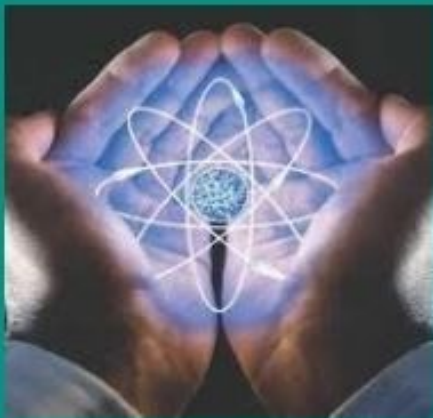


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# Academia Open



*By Universitas Muhammadiyah Sidoarjo*

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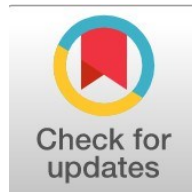
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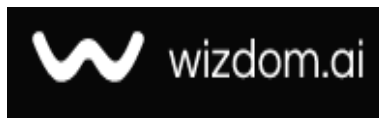
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# Evaluating Tourism Export Performance in Uzbekistan: Evidence from Empirical Survey Findings

Bekmurodova F.A, fbekmurodova@uwed.uz,(1)

*University of World Economy and Diplomacy Senior teacher, PhD, Uzbekistan*

<sup>(1)</sup> Corresponding author

## Abstract

**General background:** Tourism export has emerged as a strategic economic sector for diversifying national income, particularly for countries possessing substantial cultural and natural resources. **Specific background:** Uzbekistan, despite its rich cultural heritage and ongoing infrastructure development, faces challenges in maximizing its tourism export potential in the competitive global market. **Knowledge gap:** While previous studies have examined general tourism development patterns in Uzbekistan, empirical evidence regarding international visitors' perceptions and experiences remains notably limited. **Aims:** This study addresses this gap by investigating tourism export challenges from foreign visitors' perspectives through systematic survey analysis. **Results:** Based on questionnaire data from 172 international tourists collected during 2020-2023, findings reveal critical deficiencies in marketing strategies (84% rated performance as inadequate), limited infrastructure for eco-tourism and adventure tourism, and insufficient global information dissemination, though gastronomic and cultural tourism received favorable assessments. **Novelty:** This research contributes original empirical insights through direct visitor feedback rather than econometric modeling, providing authentic perspectives on service quality gaps. **Implications:** The study offers evidence-based recommendations for enhancing market segmentation, upgrading tourism facilities, and implementing targeted marketing interventions to strengthen Uzbekistan's competitive position in international tourism markets.

## Highlight :

- Highlights the underused tourism export potential despite strong cultural and historical assets.
- Shows low marketing visibility and limited eco-adventure facilities as major barriers.
- Emphasizes survey-based evidence revealing visitors' needs for better infrastructure and diversified tourism products.

**Keywords :** Tourism Export Performance, Visitor Perceptions, Service Quality, Marketing Gaps, Infrastructure Challenges

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## Introduction

Tourism export is one of the globally trending sectors of the economy, offerings countries an effective way to earn significant amount of revenue, increased job opportunities with low-cost investment. Unlike other traditional export industries, tourism requires optimizing existing cultural, and natural resources rather than allocating new funds. As a result, a significant number of countries, which historically relied on traditional export sectors are now shifting towards tourism-based export strategies, due to low cost and high earning potential. Having adequate natural and cultural tourism resources, Uzbekistan also has the capacity to diversify and strengthen its export portfolio through tourism [1].

Tourism stimulates economic growth through several multiple mechanisms, including foreign exchange earning, expanding global market segmentation through market visibility, attracting foreign visitors, creating employment opportunities, creating and strengthening national branding. Countries such as United Arab Emirates demonstrate how government support of tourism can significantly elevate global image and competitiveness, leading sustained economic development, instead of traditional export fields [2]. The country showed rapid change in the sector for the past 10 years, proving investment in tourism is low-cost and has rapid return to profit. With its unique strategies, country gained the image of global "Tourism hub". This example demonstrates the importance of tourism for countries like Uzbekistan [3].

Despite the growing importance of Uzbekistan's tourism export, many researchers analyzed the tourism infrastructure or regional potential of the country. While studies provided valuable insights, they offer limited empirical evidence on visitors' perceptions. This phenomenon is understudied yet critical dimension of tourism export evaluation.

The main aim of the article is to address this gap by examining how foreign visitors perceive tourism in Uzbekistan and identifying the key challenges they encounter. By analyzing, the study tries to generate evidence based recommendations to improve the competitiveness of the tourism industry in Uzbekistan [4].

## Literature Review

Enabling countries to earn more and create extra job opportunities, tourism sector turned into a vital economic driver. This sector accounted for 10% of global GDP share, 10.4% of global employment, meaning 348 million job opportunities come from this sector alone [5]. This data shows how much tourism plays crucial role in countries economies, especially Uzbekistan with its tourism resources.

Some researchers claim that Uzbekistan's tourism industry mainly affected by COVID-19 post-reform tourism policies, infrastructure improvements, and international marketing efforts, however there are still few areas to pay attention [6]. Improved infrastructure shows the comfort and attractiveness for visitors, guaranteeing safe and easy trip. Researchers from Uzbekistan and South Korea analysed how this factor effects tourism demand, especially transport infrastructure. They analysed the tourism flow between Uzbekistan and 22 countries using gravity model, key variables being number of hotels in Uzbekistan, air transport infrastructure, and tourism arrivals. The findings suggest that strategic development of transport infrastructure can effectively enhance the country's tourism sector [7]. However, this factor is not the sole driver of tourism export, but rather one of several key contributing elements.

There is a study which investigated the long-term relationship between tourism and economic growth across 105 countries. The results show that tourism export is significant for enhancing economy, which helps strengthen the national image in Uzbekistan [8].

Another study claims that the number of hotels, trade and accommodation services to be key factors influencing tourism export in Uzbekistan [9]. One of the youngest researchers of Uzbekistan, studied how FDI affects the country economy, especially for developing countries, claiming that increase of FDI will affect tourism export effect significantly. When the FDI is directed to the country's tourism export, it not only enhances the sector itself, but also the productivity of economic institutions [10].

In the terms of specific regions of Uzbekistan, several studies investigated how tourism infrastructure investment, tourism inflows and cultural recognition contributes to GDP. The results illustrate positive relationship, proving how tourism is important in economy of the country [11].

This study presents findings derived not from econometric models but from questionnaire-based surveys, which are relatively uncommon. It also provides valuable insight into tourists' perspectives [12].

## Research Methodology

Uzbekistan has good opportunity in tourism industry, even though there are many problems to tackle and improving points to pay attention. Besides, not using enough capacity of touristic opportunities existing in the country makes the situation little slower and difficult to tackle economically [13]. We would like to analyze tourism industry of Uzbekistan in detail and give recommendations to further improvements based on questionnaire survey. This survey was made during 2020-2023: during full 2 months each year (July and August).



**Table 1.** Information of the survey

Basic Information about the survey	Purpose of the visitors	Visited country (from)
<b>Time line:</b> 2017-2022 <b>Participants:</b> 172 people  <b>Frequency:</b> First time visitors: 102 Second time visitors: 70  <b>Age:</b> 23-40 – 39 people 41 and older – 133 people <b>Quantity:</b> alone – 55 In a group – 117	educational purposes – (35%) 61 people;  travel and vacation – (33%) 57 people  family visit – (19%) 32 people  business – (13%) 23 people	<b>European countries:</b> France, Germany, UK, Italy, Spain, Poland, Belarus, Russia;  <b>Asian:</b> India, Pakistan, Japan, China, South Korea, Indonesia, Singapore, Thailand, Malaysia;  <b>Middle East:</b> Egypt, Jordan, UAE, Saudi Arabia, Turkey, Iran.  <b>Other:</b> USA, Brazil, Mexico, Canada, Australia, Central Asian countries

The result of survey gives detailed information about views of visitors after pandemic. Survey was conducted as oral questionnaire with 172 tourists who visited Uzbekistan. They were asked questions and their answers were written down to analyze.

The respondents were first classified into two age-based groups: 23–40 years and 41 years or older. The main reason for the age-based classification is that people's purpose for a visit differs by age. Among older age groups, traveling for the purpose of seeing history and visiting relatives is common, meanwhile youngsters prefer extremal tourism and education [14].

Participants were segmented according to visit frequency, distinguishing first-time visitors from those who had visited previously, in order to analyze differences in perceptions of Uzbekistan. They were also classified by travel party size—solo travelers versus group travelers since traveling in a group can affect consumer behavior by increasing service usage while reducing per-person expenses. The classification continued to the level which showed the the country of origin and purpose of the visit as well.

The classification gave the clear understanding behind the responses, as people with different origin and age, or travel size effect on consumer behavior significantly.

## Results and Discussions

Results from survey opened new face of tourism industry in Uzbekistan. Answers were unexpected, enabling us clear view of foreigners perception about Uzbekistan's tourism industry. Interestingly, people expect a lot from Uzbekistan's tourism, further improvements thinking it will open up for youngsters too [15].

To make it easier for participants, many survey questions are rated on a 5-star scale, or consist of yes and no questions. The following “Yes or No” questions helped to see the current situation of the services in Uzbekistan

1. Is the transportation relatively affordable?;
2. Did you use medical services during your stay?;
3. Have you tried to invest or work on business tourism in Uzbekistan?
4. What did you like the most?
5. Whom use suggest the country to travel for?

Following group of questions required to rate the aspects of the tourism industry in Uzbekistan from 1 to 5, 5 being the highest:

1. Rate marketing of tourism in Uzbekistan from 1 to 5;
2. Rate accommodation facility from 1 to 5;
3. Rate design of restaurant and dining places from 1 to 5;
4. Rate adventure tourism in Uzbekistan from 1 to 5;
5. Rate eco-tourism in Uzbekistan from 1 to 5;



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**Table 2.** Results of the survey

	Cheap – 62%                      Expensive – 38%
Transportation	Convenience:              yes – 83% no – 17%
Medical service:	Used – 12%                      Not – 88%
Communication	Difficult – 3% Not difficult – 97% (Response: youth are capable of speaking several languages)
Have you tried to invest or work on business tourism in Uzbekistan?	Yes – 31.5% (tried to work with trade, or invest in hotel management) No – 49.5% (never got interested) Willing to- 19% (if no problems occur during the process)
What tourism types did you experience in Uzbekistan?	Cultural and gastronomic – 79% Business tourism – 7.5% Medical tourism – 0.2% Eco tourism – 3.1 (Response: we did not see quite enough facilities for it) Adventure tourism – 4.2% (Response: several theme and water parks, but not enough) Educational tourism - 5.8% (Response: not used but heard about it)
Rate marketing of tourism in Uzbekistan from 1 to 5 (5 being the highest)	5 – 0 4 – 0 3 – 4.3% (Response: better than expected but only locally) 2 – 84% (Response: not enough information about tourism places on the internet) 1 – 11.7% (Response: not enough information both locally and globally)
Rate accommodation facility from 1 to 5 (5 being the highest)	1 – 3% (response: only paying attention to modern places) 2-5% (response: prefer more traditional places) 3-73% (response: lack of accommodation for ecotourism and for one-night stayers) 4-17% (response: better than expected) 5-2% (response: better than expected, but did not get excited)
Rate design of restaurant and dining places from 1 to 5 (5 being the highest)	5 – 82% 4 – 18% (Response: might work on design on outdoor places) 3 – 0 2 – 0 1 – 0
Rate adventure tourism in Uzbekistan from 1 to 5 (5 being the highest)	5- 0 (not suitable for youth) 4- 0 (not suitable for youth) 3- 44% (not enough adventurous places) 2- 53% (just water places and some theme parks) 1- 3% (should work on adventure tourism)
Rate eco-tourism in Uzbekistan from 1 to 5 (5 being the highest)	5- 0 (not explored yet) 4- 2.7% (requires a lot of work) 3- 25.3% (not enough information about existing places) 2- 72% (no eco-touristic activities, such as paragliding, hang gliding, snow-boarding, horseback riding, rafting, bungee jumping, parachuting, abseiling, kitesurfing) 1-0
What did you like the most:	Food, people, nature, weather, historic architecture
For whom you suggest:	a) For Millennials - 52% b) youth – 8% c) both – 40%
Problems:	a) Low marketing, less information on the internet b) Price discrimination for locals and foreigners; c) Public bathroom and WC facilities; d) Garbage problems; e) Less exotic resort areas; f) Less and complicated information in local websites; g) Difficulty of transportation access; h) Mostly religious or historic places; boring for young people;
Suggestions:	a) Improving eco or nature tourism; b) Creating more resort areas; c) Applying joint religious projects; d) Creating Theme parks and aquaparks; e) Attracting foreign brands; f) Improving trade and business in tourism; g) More festivals, exhibitions, competitions, culinary events;

Aside from answering questions, participants were asked to show the problems existing in tourism industry of Uzbekistan and possible remedies to tackle the issues from their own perspective. In the table 2, the result of the survey indicates the insights of travelers. From their perspective, one of the main problems in tourism is **lack of public bathroom facilities**. When needed, they had to use the nearest shop or dining area, causing discomfort and even awkward situation. Participants identified an additional public concern beyond shortage of restrooms – the **insufficient availability of garbage bins**. Due to the limited number of bins, visitors often had to carry their waste with them until they found disposal point. These 2 problems also align with the ecological image of the country [16].

Following issues were mostly related to the **information on the internet**. Respondents told that on the internet there is insufficient information, also country's official websites do not provide the latest statistical data. They claim that accessible information on the internet tends to present Uzbekistan as a traditional and historically focused nation, even conveying the image of it as a place where gender segregation is still exists and economical lack of development [17].

However, their impression about Uzbekistan changed drastically after their visit, seeing it as rapidly developing country, with both modern and historical sides.

Participants not only pointed out the existing issues, but also showed the **possible tactics** to prevent them. Creating resort areas, not depending on historic and religious tourism would give enhanced tourism opportunity for the country they said.

As result of survey gave more information of how people think and what problems they are facing, we tried to make a macro scale SWOT analysis of tourism export of Uzbekistan. SWOT analysis is well suitable for the purpose, giving a brief footage of all 4 dimensions of tourism industry (Table 3).

**Table 3.** SWOT analysis of tourism industry in Uzbekistan

<p><b>Strengths</b></p> <ol style="list-style-type: none"> <li>1. Leading in religious, pilgrimage and gastronomic tourism;</li> <li>2. Good opportunity for producing touristic and consuming products;</li> <li>3. Great tourism job opportunities;</li> <li>4. Less language barrier;</li> <li>5. Abundant Sightseeing for historical purposes;</li> <li>6. Presentable fashion opportunity;</li> <li>7. Accessible touristic ceramics and pottery opportunity;</li> </ol>	<p><b>Weaknesses</b></p> <ol style="list-style-type: none"> <li>1. Less profit from FTZs;</li> <li>2. Low and expensive medical services;</li> <li>3. Bad internet;</li> <li>4. Inconvenient transportation;</li> <li>5. Less sport, cultural, cooking, fashion events;</li> <li>6. Less attraction of foreign students;</li> <li>7. Inadequate marketing;</li> <li>8. Exiguous number of amusement park;</li> <li>9. Little number of resort areas;</li> </ol>
<p><b>Opportunities</b></p> <ol style="list-style-type: none"> <li>1. Applying compound tourism with Saudi Arabia (for "Hajj" and "Umrah" trips);</li> <li>2. Potent marketing;</li> <li>3. Improving all types of tourism;</li> <li>4. Hosting international conferences;</li> <li>5. Establishing events, competitions and festivals;</li> <li>6. Establishing "Travel platform";</li> <li>7. Improving public bathroom and WC facilities;</li> <li>8. Innovative accommodation system;</li> </ol>	<p><b>Threads</b></p> <ol style="list-style-type: none"> <li>1. Political reputation;</li> <li>2. False information about Uzbekistan;</li> <li>3. Appearance of competitors;</li> <li>4. Political situation of similar Muslim and neighbor countries;</li> <li>5. Air pollution and deforestation;</li> <li>6. Lacking in international ranks: in the terms of ecology, tourism, happiness, business, food protection and investment.</li> <li>7. Getting used to only older generations, namely "Millennials"</li> </ol>

Source: Compiled by author

Based on survey results, Uzbekistan has several **strong points** in tourism industry, one of them is **being a leader** in religious, gastronomic and historical tourism in Central Asia. Many people around the world come to 3 main cities of Uzbekistan to enjoy sightseeing and traditional food. It is important to note that, these 4 types of tourism account 95% of tourism export in Uzbekistan. Aside from enough touristic resources, Uzbekistan has a well educated population, with both younger and older generation demonstrating proficiency in at least 2 languages, which is the main factor of eliminating language barriers for visitors. On the other side of the coin, this point is connected to an opportunity of creation other tourism types, especially business and medical tourism which will be explained in the opportunities section below. Combining all the remaining strengths, it is clear that **production of tourism products and services** are worth to buy and sell, also, popular enough in the world. Fashion products, ceramics, pottery are very well made in here pleasing visitors all over the world [18].

However, the Uzbek tourism industry is not without its **weaknesses**. *Leaning on certain tourism types* makes the tourism market segment noticeably small. As the respondents answered that this country is mostly suitable for Millennials, shows the lack of potent marketing strategies for attracting tourism export. Youth prefer places for eco or extreme tourism destination to recharge themselves, rather than just visit sightseeing which existed over a decade. Another biggest problem of the industry is **lack of proper information** on the internet. Constant show of historic side of the country gives inadequate image. The reason for this problem is insignificant marketing in tourism industry. Showing what the country is able to do via events, runaways, competitions and proper marketing campaigns would tackle this problem. **Low infrastructure and facilities** is also one of the greatest obstacles in the industry. From bad internet to lack of enough public restrooms, less number of resort areas, these shortcomings create discomfort for visitors.

One of the main **threats** in Uzbekistan's tourism is political situation of neighboring countries. The first country as a threat is considered Afghanistan, locating close to it makes people think Uzbekistan has the same political management and situation. Some tourists get afraid of visiting our country thinking "potential Afghani threats" may appear. Another biggest threat for our tourism is Russia and its political position. Many European countries consider Uzbekistan as Russia's part state, while other consider it as subordinate state. War between Ukraine and Russia is making people hesitate to visit here. In short, **political reputation** can be a big threat in the future if information error will not be corrected as soon as possible. Another threat of tourism industry is **ecology and deforestation**. Generally, our season are dry and extremely hot or cold for many people. If deforestation goes on its pace like it is right now, it may cause shrink of tourism export.

Although there are many threats and weakness, **opportunities** to develop tourism are high enough. Main biggest opportunity is to improve and change structure of Tourism Economic Zones (**TEZs**). Directing more investment and applying joint programs will may give more economic profit from 7 TEZs. Paying attention to other types of tourism, such as eco-tourism, adventure, exotic tourism, recreational tourism, mountaineering, business and medical tourism will change the title of "**Millennials' destination**" to "**Youth Camp**". Offering several types of tourism should be started from applying **potent marketing strategy**. As economists say: More you see, if you show more. In order to see we have to change miles of our tourism scope. Additionally, it is important to mention that, in Islam there are 2 main pilgrimage places in the world: The Holy Kabatullah and 7 "Pir" pilgrimage. Second holy place is placed in Bukhara city, giving opportunity to make **joint project** with Saudi Arabia. 1.5 bln Muslims and expansion of them more, makes it bigger fish to catch. Making people aware of pilgrimage place in Uzbekistan more, makes Muslims to travel here. Detailed remedies for the current issues, tactics and long term strategies will be shown in the upcoming article of the author

## Conclusion

The study showed that having direct insights of visitors gives clear image of Uzbekistan from their perspectives. From the survey, it can be concluded that Uzbekistan has good opportunity in tourism industry, even though being landlocked and historic country. In central Asia Uzbekistan is leading in tourism industry with gastronomic, cultural, historic and pilgrimage tourism types. The events that have been conducted and those scheduled to be hold results in the increase in tourism flow. Especially recent gastronomic and pilgrimage festivals lead increased tourism market segmentation for the country. However, there are some issues which are standing as a barrier for turning Uzbekistan into global tourism hub, requiring step by step resolution.

Based on respondents who participated in the survey, cultural and gastronomic tourism dominate with 79% of respondents experiencing, while eco-tourism and adventure tourism remain underdeveloped. Participants rated the aspect of tourism industry from 1 to 5, and 5 being the highest shows further gaps in export potential. Ratings showed low scores (2-3) for adventure and eco-tourism, also marketing in the industry (84% rated 2, 11.7% rated 1) reflecting limited facilities and lack of marketing skills in the industry. However, the design of dining areas showed strengths of the industry with the high score (82% rated 5).

Analyzing the transportation it can be concluded as affordable (62%) and generally convenient (83%), still having some problems to solve. Survey results gave information about how are attracted to invest in Uzbekistan and their view for medical services too. This shows the potential for increasing business and medical tourism with proper qualification and marketing strategies.

The SWOT analysis confirms that rich cultural, religious, and gastronomic assets, historical sightseeing, and tourism-related employment as industry's strengths. Weaknesses involve poor marketing, limited resort and amusement facilities and inadequate infrastructure. Opportunities relate to eco- and adventure tourism development, international collaborations, hosting events, and improving accommodation and public facilities, meanwhile threats to the industry involve political risks, competition from neighboring countries, environmental issues, and low international visibility.

Addressing weaknesses and capitalizing on new opportunities can enhance the international attractiveness of Uzbekistan, develop new tourism products, and reinforce the status of Uzbekistan in the world tourism market.

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