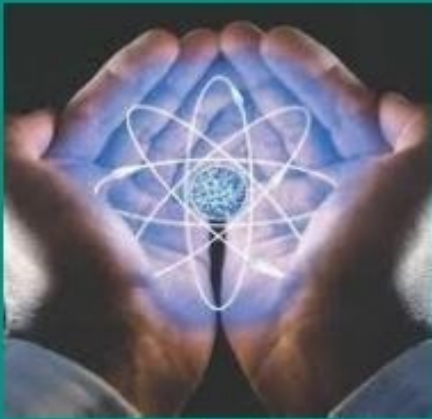

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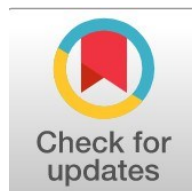
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Tourism Destination Evaluation in Uzbekistan: Assessing Key Regions through the Lens of Competitiveness and Lifecycle Stages

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Abstract

General Background: Tourism has become a strategic sector for Uzbekistan’s economic diversification, driven by its rich cultural heritage and increasing international visibility. **Specific Background:** Major destinations such as Tashkent, Samarkand, Bukhara, and Khiva exhibit differing performance levels that require systematic evaluation using established tourism frameworks. **Knowledge Gap:** Existing studies largely rely on descriptive approaches and rarely integrate quantitative destination competitiveness indicators with tourism lifecycle analysis at the regional level. **Aims:** This study quantitatively assesses the competitiveness and lifecycle stages of key Uzbek destinations by integrating the Tourism Area Life Cycle (TALC) model with the Travel and Tourism Competitiveness Index (TTCI). **Results:** Findings indicate that Tashkent and Samarkand demonstrate higher arrivals, ADR, RevPAR, and occupancy rates, positioning them in the consolidation stage, whereas Bukhara and Khiva show lower economic performance and characteristics of maturity, with challenges in attracting high-spending international tourists. **Novelty:** The study provides one of the first empirical, region-specific analyses in Uzbekistan that simultaneously applies competitiveness and lifecycle frameworks using quantitative indicators. **Implications:** The results inform evidence-based destination management, highlighting the need for sustainability strategies in advanced destinations and targeted infrastructure, marketing, and product diversification to rejuvenate mature cities and strengthen Uzbekistan’s long-term tourism competitiveness..

Highlight :

- Tashkent and Samarkand show the strongest competitiveness and are in the consolidation stage of the tourism life cycle.
- Bukhara and Khiva perform at lower levels, indicating maturity-stage destinations needing regeneration.
- Sustainability and cultural preservation are essential for long-term tourism competitiveness..

Keywords : Uzbekistan Tourism, Destination Competitiveness, Tourism Area Life Cycle, Travel and Tourism Competitiveness Index, Sustainable Tourism

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Introduction

Global tourism is now one of the pillar industries of the world economy with a significant share in GDP and employment. In the last few decades some sharp increase in international arrivals in many countries including Uzbekistan shows that the tourism sector is resistant. Such expansion has been bolstered by burgeoning global demand together with national policies which are sited towards developing tourism ecosystem and celebrating heritage. Archaeological evidence suggests that Turkic groups travelled even further - in 1425 a Turkish sultan from the Altyn ordan area raided right through Russia to the gates of Novgorod! It is not exactly a secret in the tourism world that Uzbekistan boasts the UNESCO World Heritage cities of Samarkand, Bukhara and Khiva, with their heavy and deep historical textiles, weaving and craftsmanship. Thus, the country has established itself as an up-and-coming tourist centre for Central Asia, but — like so many places — is grappling with how to balance that growth sustainably. Hence, it underscores the necessity to utilize existing theories of tourism in a national context to measure Uzbekistan tourism destination for example as applying destination competitiveness & tourism lifecycle.

The notion of tourism destination competitiveness (TDC), which explains how over time destinations are able to appeal to people and still preserve their resources for future generations, has emerged as a central theme. Dupeyras and MacCallum [1] define the tourism competitiveness of a destination as its capacity to optimize its resident and non-resident attractiveness, deliver quality and innovation services, and capture market share within the world tourism market. The above definition highlights the multi dimensional nature of competitiveness, as it goes beyond economic indicators, including factors on both the demand side, such as visitor arrivals & spend, but also on the supply side, namely social, environmental and infrastructure factors that impact on how visitors experience the destination. And as one of the best-established methodologies for assessing these competitive dimensions, the World Economic Forum Travel & Tourism Competitiveness Index (TTCI) provides insight into where a destination makes the most of its advantages and where it struggles. Destinations are assessed on infrastructure and regulatory environment as well as safety and societal resources along with cultural and natural resources that support tourism. Although there are many such indices, their preliminary results for Uzbekistan represent a good yardstick for a country in the global tourism picture [2].

One more important framework to analyze the development stages of tourism destinations is the tourism lifecycle concept (Butler 1980). As per the Tourism Area Life Cycle (TALC) model, any destination experiences a sequence of stages starting with exploration followed by involvement, development, consolidation, stagnation, and eventually either decline or re-invention. Progression through these stages is characterized by variations in the destination's tourism performance can be in terms of tourist arrivals, infrastructure created, and the overall wealth created by tourism. Using this model in Uzbekistan's major tourist destinations (Samarkand, Bukhara, Khiva, Tashkent) can help to figure out where are cities in their lifecycle and what strategy need to be used in order to keep up / increase competitiveness. The TALC framework further emphasizes that proactive destination management is necessary in order to prevent stagnation or decline, which is particularly relevant to mature destinations like Samarkand and Bukhara that have higher stages of development and therefore the issues surrounding attraction maintenance [3].

Abstract: Although the amount of studies about tourism of Uzbekistan increased in the last couple of years, there is, however, a clear lack of empirical research where the concurrent use of competitiveness framework and lifecycle model are applied to measure the important tourism objectives of the country. While many scholars have undertaken the analysis of the tourism development possibilities in Uzbekistan, mentioning the policies of its government, few of them have examined the performance of various regions on an internationally accepted measure, using quantitative methods. The absence of quantitative research is a missing piece of the puzzle which prevents taking data and evidence based decisions in the context of tourism development and investment. Despite some notable exceptions, most of these studies rely on descriptive analyses stressing wide trends and strategic directions without a thorough assessment of the tourism competitiveness of each region across the tourism lifecycle [4].

To address that gap, this study will provide a quantitative assessment of Uzbekistan tourism destinations — namely tourism in its major cities including Samarkand, Bukhara, Khiva, and Tashkent. The paper attempts to depict the actual picture of the state of tourism development in Uzbekistan through integrating constructs of destination competitiveness and tourism lifecycle and based on quantitative indicators such as number of arrivals, length of stay, average daily rate (ADR) and occupancy rates. We will benchmark Uzbekistan against other global destinations by the Travel and Tourism Competitiveness Index (TTCI) as well as regional competitiveness indices such as the EU Regional Competitiveness Index (RCI). In addition, this research will analyse the association between these performance indicators and the different lifecycle stages of each city, to provide information that could stimulate destination management and strategic development.

The significance of this study is in providing pioneering investigation via quantitative methods along with its recommendations for responsible tourism stakeholders in Uzbekistan. While the country has been trying to act as a major touristic pole within Central Asia, it should identify the requirements of all areas and develop the necessary strategies that would enable there ordinary competitiveness. Take, for instance, cities that are still in the early development stages, like Khiva, which may need some infrastructure updates along with marketing to help entice international tourism. On the other hand, destinations that are in the consolidation or maturity stages like Samarkand and Bukhara should avoid stagnating by enhancing sustainability and innovative product diversification of their tourism offering. This study, therefore, seeks to use TALC and TDC frameworks in order to help provide a constructive strategic roadmap that promotes Uzbekistan to increase its competitiveness in the international tourist market [5].

Given the growing need for a focus on the sustainability and resilience of tourism destination management at global level, recent studies depict a shift in the landscape of tourism destination management relating the manner in which the market dynamics evolve (e.g. digitisation of services and changing visitor demands for responsible travel). In Uzbekistan, all these trends are especially touched, and thus a more sustainable tourism policy might give the country competitive edge. Moreover, the use of virtual tools, such as social media analytics and online reputation management, has an important role in the visibility of destinations and the attraction of a wider scope of tourists. Digital platforms such as Instagram, Facebook, and Google Trends have an impact on the perception of tourism destinations in the eyes of the visitors, the understanding of such influence can provide the background for the cities of Uzbekistan to facilitate marketing strategies using unconventional ways to attract tourist attention and needs [6][7][8].

Eventually, this research will be helpful in providing extensive analysis of the touristic sites of Uzbekistan as well as its competition within the region and its future developments. This research study, through the use of existing tourism frameworks and the use of fresh data, intends to assist policy makers, destination managers and stakeholders in their decisions creating sustainable tourism growth and promotion of Uzbekistan in the international tourism market. This study also offers a quantitative assessment of tourism performance of Uzbekistan which is missing in the literature and contributes to the existing body of knowledge

Materials and Methods

The research methodology of this study is quantitative and focuses on evaluating the tourism competitiveness of core locations of Uzbekistan such as Tashkent, Samarkand Bukhara and Khiva. This paper incorporates the Tourism Area Life Cycle (TALC) model and the Travel & Tourism Competitiveness Index (TTCI) framework to assess the stages of the founding industry and tourist destinations in these countries. The main statistics examined are tourist arrivals, average length of stay (ALOS), average daily rate (ADR), revenue per available room (RevPAR) and occupancy, each vital to the competitive position of every destination. A wide range of the secondary literature, including reports from the government on tourism in Uzbekistan, Top travel competitiveness index (TTCI) rankings, and conglomerates such as the UNWTO database

enabled this widespread overview on the state of tourism in Uzbekistan in 2022. It further included evidence from recently published tourism performance studies and reports in Central Asia to help assess the hosting destinations in Uzbekistan against international benchmarks. Statistical tools to compare the findings and establish trends, correlations and regional differences were used to analyze the data. This research methodology enables an empirical analysis of the development phases of each city according to the TALC model, indicating if a destination is in the exploration, development, consolidation, or maturity phase. The methodology allows us to deeply grasp each region's tourism performance and provides pragmatic directions for how Uzbekistan can improve its tourism competitiveness with strategic policy implementation with respect to sustainability, infrastructure development and market diversification..

Results and Discussion

Insights from destination competitiveness and growth potential in Uzbek tourism performance analysis For this assessment, the main metrics used are tourist arrivals, average length of stay (ALOS), average daily rate (ADR), revenue per available room (RevPAR) and occupancy rates. These indicators are valuable for understanding the advantages and disadvantages of the tourism destinations in Uzbekistan, and the phases of their development through the Tourism Area Life Cycle (TALC) model [9].

Tourist arrivals: this is one of the top parameters to define the competitiveness of a destination. Reflecting the interest of international tourists to the country, in recent years Tashkent and Samarkand have been the leading cities in terms of visitation. Samarkand scored a record high with 15% year-on-year surge in tourist arrivals in 2022, compared to national average of 7.8%. Many people say that more visitors are coming to city as city is internationally recognised hub for art and specifically folklore oriented cultural tourism especially with large cultural attractions such as.

Registan Square and Shah-i-Zinda. Likewise, Tashkent, the capital and largest city, saw dramatic increases in inbound arrivals as it serves as a business tourism center as well as the primary point of departure for visitors heading elsewhere in Uzbekistan. Meanwhile, Bukhara and Khiva, despite being key cultural and shopping venues, took longer to shift to the new conditions of tourism, pointing to the difficulties that small and distant settlements have with foreign tourists. That slower growth in these cities implies that they are likely further behind in the tourism development cycle and need more marketing and infrastructure investment to improve global familiarity and interest [8].

Table 1: Tourism Performance Indicators by Region (2022)

Indicator	Tashkent	Samarkand	Bukhara	Khiva	National Average
Tourist Arrivals	1,200,000	800,000	500,000	300,000	3,000,000
Average Length of Stay (ALOS)	1.8 days	3.2 days	2.5 days	2.1 days	2.5 days
ADR	\$105	\$120	\$75	\$70	\$95
RevPAR	\$80	\$85	\$50	\$45	\$70
Occupancy Rate	76%	70%	58%	55%	68%

Table 1: Summary of resultsčnost Nikov on the performance of Uzbekistan tourism destinations Major destinations by arrivals are Tashkent and Samarkand, which are attractive enough on their own. A business city, Tashkent, which welcomed 1.2 million arrivals, is closely followed in visitor numbers by Samarkand – 800,000 arrivals, thanks to its cultural value. Samarkand ranks No.1 for Average Length of Stay (ALOS) with 3.2 days as it is oriented for tourists seeking for cultural experience while Tashkent with 1.8 days has the shortest ALOS as it is oriented for business tourism.

ADR and RevPAR are highest (\$120 and \$85 respectively) in Samarkand which, in fact, is a peak at the tip of the spear of our luxury tourism market. Then there comes Tashkent at \$105 ADR and \$80 RevPAR due to business tourism and a busy capital. In contrast to this, the figures for Bukhara and Khiva is much lower, implying that they focus more on budget tourism, like the sort expected in mature tourism destinations. Finally, Tashkent has the highest occupancy rates (76%) indicating a strong demand for business tourism, while Khiva and Bukhara struggle with lower occupancy rates (55% and 58% respectively) and need improvements in infrastructure and more focused promotional activities.

While tourist arrivals is the most important indicator of tourism, average length of stay (ALOS) complements it by consistently indicating the quality of the tourism experience and the attractiveness of a destination. Samarkand and Bukhara received longer stays, with average ALOS of 3.2 nights per traveller, compared to Tashkent, with a much lower ALOS of 1.8 nights. The main reason of high ALOS in Samarkand and Bukhara is the number of historical and cultural heritage sites which require more time to visit. Such cities attract tourists who want to truly get acquainted with the local culture, and tend to stay longer. Tashkent on the other hand, is mostly a transit destination for international passengers, especially those traveling on business, which results to a lower ALOS. A shorter visit here shows that while Tashkent is an important urban centre, it may not yet be able to provide as much of the respite or immersion that cities such as Samarkand or Bukhara can offer the leisure traveller. Meanwhile, the smaller average length of stay of Tashkent denotes that, as well, there is growth potential in the leisure tourism market through more attractions and increase of nights spent by the International visitors [2].

Understanding ADR and RevPAR in the context of tourism: The economic value of the tourism sector of Uzbekistan The top two cities, represented by Samarkand with an ADR of \$120 per night and Tashkent with an ADR of \$105, show that luxury hotels are in demand in these cities. Samarkand has also seen its ADR rise in 2022, as it is increasingly attracting a range of luxury travelers keen to experience the historic and opulent city. In contrast, the USD-per-night figures for Bukhara and Khiva were just \$75 and \$70 each, respectively. While these cities may be rich in culture and history, these figures indicate that they are more oriented towards budget travelers, and will likely struggle to draw high-spending tourists. This comparatively low RevPAR in Bukhara and Khiva reflects the competitive pressures confronting smaller cities that are still well below the tipping point level of Samarkand and Tashkent. This underscores the necessity of products and infrastructure investments to cater for international tourists who spend more in these locations [8][2].

Occupancy rate is a key metric indicating usage of accommodation capacity. The highest occupancy rate was recorded in Tashkent – 76%, followed by Samarkand – 70%. Tashkent, being a business destination with so many conferences, events, and meetings taking place, had high occupancy as well. The city's international arrivals, steady thanks to its attractiveness as a cultural tourism destination, help keep its occupancy rates relatively high. However, Khiva and Bukhara only achieved occupancy rates of 55% and 58%, meaning these cities struggle to pull in a year-round flow of inbound visitors. Cold and winter vacancies. By contrast, Khiva and Bukhara face cold and winter vacancies—presumably reflecting their more seasonal appeal and more difficult accommodation infrastructures for year-round tourism. Here, better tourism infrastructure, enhanced international awareness, and focused marketing can raise occupancy and bring more international visitors for those destinations [2].

Samarkand and Tashkent were indicated as the leading competitive destinations in Uzbekistan based on the findings from the quantitative data analysis, highlighted by strong tourist arrivals, decent ADR and RevPAR and high occupancy rates. Such cities are most likely at the consolidation stage of the TALC model with great worldwide exposure and an emphasis on attracting medium to high-end luxury tourists. However, challenges remain especially in sustainable tourism and infrastructure development [10] [11] [13]. So for example, Samarkand, it's not only how will it become more attractive, but also how to make sure it wouldn't result into overtourism problem with so many different upcoming countries at least upping their interest when it comes to its revival. Sustainable tourism practices, as well as preservation of cultural heritage, thus are vital for the long-term competitiveness of the destination.

On the other hand, Bukhara and Khiva having such an alluring history and cultural background they do have lower ADR, RevPAR, and occupancy rates. These are cities in the maturity stage of the TALC model requiring rejuvenation strategies to stay competitive. This all comes down to giving these cities as much exposure globally as possible, creating unique tourism products and then ploughing back into these cities in likes of infrastructure to really lift the experience of visitors. Developing eco-tourism, adventure tourism or wellness tourism could open new growth opportunities for sustainability and cultural preservation [14] [15].

This analysis of the tourism destinations of Uzbekistan leads to a number of policy implications. Tashkent needs to work on the increase of ALOS and RevPAR including diversification of the offer with leisure tourism and cultural tourism. It could be marketing the likes of the Khast Imam Complex and Chorsu Bazaar, places that are less familiar as attractions than Samarkand or Bukhara. Sustainability is key for Samarkand, and keeping the rise in tourist numbers to a minimum because of their environmental impact, investing in green technologies and making sure that infrastructure works do not deteriorate its cultural heritage.

Bukhara and Khiva have been slower to develop, as they both need further infrastructure as well as better marketing as well as niche tourism products. Investment also may come in the form of eco-tourism and heritage tourism programmes that can leverage the special history these cities have to offer in terms of unique architecture. Moreover, all regions should place emphasis on formulating sustainable tourism policy to promote an economically and environmentally sustainable evolution of tourism in these respective regional systems.

Conclusion

Using the analytical outcomes, it presents that the main tourism top destinations in Uzbekistan generally excel on a competitive basis based on tourist arrivals, ADR and RevPAR and overall position them in the consolidated phase of the Tourism Area Life Cycle (TALC) model particularly in the cases of Tashkent and Samarkand. These locations are bolstered by cultural heritage, a healthy demand for luxury tourism, and developed infrastructures. On the other hand, Bukhara and Khiva, although their historical and cultural values are so much higher, are located in the maturity phase and need regeneration strategies feeling this by their lower ADR and occupancy rate and more importantly the inability to attract more high-spending international tourists. The study brings forth the need for sustainable tourism and product diversification, so that the risks associated with stagnation can be avoided and while Bukhara and Khiva are in the process of gaining competitiveness through another development path. Implications for policymakers include improved marketing and infrastructure, and increased effort on making smaller cities more globally visible. Sustainable tourism development: In Okavango, tourism development must also be sustainable to support long-term tourism growth. Additional studies on the role of digital marketing, social media involvement, and eco-tourism in Uzbekistan tourism are needed, as well as longitudinal studies that monitor the impact of policy action and tourism solutions on the competitiveness of Uzbekistan destinations over time.

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