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Evaluating Uzbekistan's Tourism Competitiveness: A Quantitative Assessment of Key Destinations through TALC and Performance Indicators

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ABSTRACT

Uzbekistan’s tourism sector, enriched by historical cities like Samarkand, Bukhara, Khiva, and Tashkent, holds significant potential for economic growth. However, there is a gap in empirical research assessing the competitiveness of these destinations using established frameworks. This study addresses this gap by applying the Tourism Area Life Cycle (TALC) model and Tourism Competitiveness Indicators such as tourist arrivals, Average Length of Stay (ALOS), Average Daily Rate (ADR), and Revenue per Available Room (RevPAR) to evaluate key tourism destinations. The findings reveal that Tashkent and Samarkand are in the consolidation phase, demonstrating strong competitiveness, while Bukhara and Khiva face challenges and are in the maturity stage. Samarkand and Tashkent lead in tourist numbers and revenue indicators, while Bukhara and Khiva exhibit lower performance, requiring infrastructure improvements and targeted marketing to attract high-end tourists. The study implies that for continued growth, Uzbekistan must focus on sustainable tourism, luxury market offerings, and digital marketing. The findings underscore the need for rejuvenation strategies in Bukhara and Khiva to diversify tourism products and improve global visibility.

KEYWORDS

Uzbekistan, Tourism Competitiveness, Tourism Area Life Cycle (TALC), Samarkand, Tashkent, Bukhara, Khiva, Average Daily Rate (ADR), Revenue per Available Room (RevPAR), Average Length of Stay (ALOS), Sustainable Tourism, Digital Marketing, Tourism Policy, Destination Development

INTRODUCTION

Uzbekistan, a landlocked country situated in Central Asia, is undergoing a significant transformation in its tourism sector. With its rich historical and cultural heritage, including cities like Samarkand, Bukhara, Khiva, and Tashkent, the country offers unique experiences to tourists

from around the world. The Uzbek government has taken strategic steps to enhance the tourism industry, focusing on infrastructure development, marketing, and the preservation of its cultural heritage. Despite this progress, there remains a notable gap in empirical research assessing Uzbekistan's tourism destinations through internationally recognized frameworks. While several studies have addressed the growth potential of Uzbekistan's tourism industry, few have quantitatively evaluated its key regions based on performance indicators such as tourist arrivals, average length of stay (ALOS), average daily rate (ADR), and revenue per available room (RevPAR). This study aims to fill that gap by applying both the Tourism Area Life Cycle (TALC) model and Tourism Competitiveness Indicators to evaluate the competitiveness and development stages of Uzbekistan's major tourism destinations.

The concept of Tourism Competitiveness has become a cornerstone in understanding how destinations attract and retain visitors while ensuring sustainable economic and social benefits. According to Dupeyras and MacCallum [1], tourism competitiveness refers to a destination's ability to provide high-quality services, manage resources effectively, and remain attractive to both international and domestic tourists. The Travel & Tourism Competitiveness Index (TTCI), developed by the World Economic Forum, is one of the most widely used tools to evaluate tourism destinations across a range of dimensions such as infrastructure, regulatory environment, safety, and cultural resources [2]. In this study, we utilize TTCI indicators to benchmark Uzbekistan's performance against other global destinations, providing insights into its relative strengths and weaknesses. Alongside this, the TALC model, first proposed by Butler [3], is applied to understand the lifecycle stages of Uzbekistan's key cities, which include Samarkand, Bukhara, Khiva, and Tashkent. The TALC model posits that tourism destinations evolve through a series of stages, from exploration to consolidation, and possibly stagnation or rejuvenation. By categorizing these cities according to the TALC framework, the study assesses where each city stands in its development journey and identifies strategies for maintaining or enhancing competitiveness.

This research adopts a quantitative approach to assess tourism performance in Tashkent, Samarkand, Bukhara, and Khiva. Secondary data was obtained from various sources, including government tourism reports, TTCI rankings, and industry databases. The study focuses on key performance indicators such as tourist arrivals, ALOS, ADR, RevPAR, and occupancy rates. These indicators provide a comprehensive view of the competitiveness and attractiveness of each destination, helping to identify strengths and areas for improvement. The study also integrates the TALC model to classify each destination's stage of development. Statistical methods were employed to analyze the relationships between these performance indicators, enabling a detailed understanding of each region's tourism dynamics.

The findings from the analysis reveal significant differences in the tourism performance of Uzbekistan's destinations. Tashkent and Samarkand emerged as the leading regions, exhibiting the highest tourist arrivals, ADR, and RevPAR, indicating their strong competitive position in the global tourism market. In 2022, Tashkent recorded 1.2 million tourist arrivals, reflecting its role as the country's business hub and gateway for international tourists. Samarkand, with 800,000 visitors, has become increasingly popular for cultural tourism, attracting travelers with its UNESCO World Heritage sites like Registan Square and Shah-i-Zinda. Both cities are likely in the consolidation stage of the TALC model, characterized by strong growth, steady visitor numbers, and a well-established infrastructure. The relatively high ADR of \$120 in Samarkand and \$105 in Tashkent suggests a focus on higher-end, luxury tourists, with both destinations benefiting from the growing demand for premium accommodations and cultural experiences.

In contrast, Bukhara and Khiva recorded lower figures in terms of tourist arrivals and ADR,

indicating that these cities face greater challenges in attracting international tourists. Bukhara received 500,000 visitors in 2022, while Khiva had 300,000, highlighting the regional disparity in tourist demand. Despite being rich in historical and cultural assets, these cities appear to be in the maturity stage of the TALC model, where tourism growth slows down, and destinations face the risk of stagnation. The lower ADR figures of \$75 for Bukhara and \$70 for Khiva suggest that these cities cater more to budget-conscious tourists, primarily domestic visitors or those looking for cost-effective options. Additionally, Bukhara and Khiva had lower occupancy rates (58% and 55%, respectively), indicating that there are underutilized accommodation capacities in these cities. The findings suggest that Bukhara and Khiva need to improve their infrastructure, marketing strategies, and tourism products to attract higher-paying international visitors and increase their competitiveness.

The analysis of ALOS further highlights the differences in the type of tourism offered by each destination. Samarkand led with an ALOS of 3.2 days, reflecting its appeal to tourists seeking immersive, long-term cultural experiences. In contrast, Tashkent had a shorter ALOS of 1.8 days, indicative of its role as a business tourism hub, where international visitors stay for shorter periods. Bukhara and Khiva had moderate ALOS figures of 2.5 and 2.1 days, respectively, suggesting that these cities attract tourists who are primarily interested in cultural sightseeing but may not offer as diverse or extended experiences as Samarkand.

The study's findings underscore several policy implications for Uzbekistan's tourism sector. First, Tashkent and Samarkand should focus on maintaining their competitiveness by promoting sustainable tourism practices and environmental conservation as visitor numbers continue to rise. Samarkand, in particular, faces the risk of overtourism, making it crucial to adopt strategies that balance growth with preservation. In addition, both Samarkand and Tashkent should continue to invest in luxury accommodations, cultural tourism, and high-end market offerings to attract high-spending tourists and maintain their market position.

For Bukhara and Khiva, there is a clear need for rejuvenation strategies. These cities could benefit from niche tourism products such as eco-tourism, adventure tourism, and wellness tourism. Additionally, increasing their digital presence and improving transportation links could help boost international visibility and encourage year-round tourism. Investments in tourism infrastructure and capacity-building for local businesses will also be critical for enhancing visitor experiences and increasing occupancy rates.

In conclusion, Uzbekistan's tourism destinations, particularly Tashkent and Samarkand, are well-positioned for growth, but they face challenges related to sustainability and the diversification of tourism products. Meanwhile, Bukhara and Khiva require targeted strategies to enhance their competitiveness and attractiveness to international tourists. Future research should explore the role of digital marketing, eco-tourism, and sustainable tourism policies in further improving the competitiveness of Uzbekistan's tourism sector. Additionally, longitudinal studies are needed to track the effectiveness of tourism strategies and evaluate the impact of infrastructure and policy investments on the long-term development of Uzbekistan's tourism destinations.

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