

ACCELERATED DEVELOPMENT OF TOURISM IN UZBEKISTAN: TRENDS, REFORMS AND RESULTS

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ABSTRACT

Aim. The article examines the experience of the Republic of Uzbekistan in forming a tourism industry as a locomotive for accelerated development of the national economy based on significant factors in the development of this sphere, such as simplifying tourist formalities, improving the tourism infrastructure, creating favorable conditions for the tourism business, expanding the range of tourist services, improving the quality of provided services and diversification of the tourist product, increasing the investment attractiveness of tourist regions and quality Training Twa, as well as appropriate use of the country's tourism potential.

Results. The article presents the main directions of reforming tourism. Based on the analysis of trends in the development of tourism in the country, the results of these reforms are justified.

Key words. Accelerated development, tourism, Uzbekistan, trends, reforms, tourism flow.

INTRODUCTION

The modern tourism industry is the largest global producer of gross world product and the main source of employment – it accounts for a significant part of world indicators. According to the World Travel and Tourism Council, in the tourism sector in 2017, over 292.2 million people were employed, or 9.6% of the total employment in the world. Also, its share today accounts for 10.2% of world GDP (given the direct, indirect and induced impact of tourism on the world economy), 30% of world exports of services (\$ 1.5 trillion) and 7% of world exports of goods and services, as well as every 10th job created in the global economy. Being a powerful catalyst for the socio-economic development of individual countries and regions, tourism ensures the

inflow of foreign currency and investment, contributes to the rapid growth of related industries, helps to solve the employment problems of the population, improves the country's reputation in the world community (Sobirov, 2018).

It is important to note here that the economic power of tourism is largely based on the multiplicative effect, which is quite large in tourism. Due to the multiplication effect, one job in tourism creates seven new jobs in other industries and sectors related to tourism by a cooperative chain. Because of this, tourism can give a start to a qualitatively new stage in the development of many regions of the country, especially with great recreational opportunities (Sobirov et al., 2015).

Uzbekistan is not an exception, from time immemorial it was famous for its ancient cities, whose treasury was replenished solidly at the expense of merchants and travelers. Uzbekistan has a huge tourist and recreational potential, which has 7.4 thousand objects of cultural heritage, 209 of them in the four city-museums *Ichan Kala in the city of Khiva*, *Historical center of Bukhara*, *Historical center of Shakhrisabz* and *City of Samarkand* included in the list of UNESCO World Heritage Sites. However, in Uzbekistan tourism has not yet reached a level of development that is adequate to its potential (Baxtishodovich, Suyunovich, & Kholiqulov, 2017)

Today, focusing on the accelerated development of the tourism sector, one of the targets and priorities of state tourism policy for the medium term is to give tourism the status of a strategic sector of the economy, turning this sector into a powerful tool for sustainable development, structural transformation and economic diversification, which should become a locomotive for accelerated integrated development of all regions and related industries (Bobur & Alimova, 2017).

The reforms carried out in this direction began to bear fruit. During the period 2010-2017, the export of tourist services of Uzbekistan doubled and amounted to 546.9 million US dollars in 2017, and in 2018 – 1041 million US dollars. The average annual growth rate of foreign visitors to 2016 was 8 percent, in 2017 – 32.7 percent and exceeded 2.69 million people. At the end of 2018, about 5.3 million foreign tourists visited the republic.

LITERATURE REVIEW

Tourism has been considered as a major acceleration of economy in Uzbekistan by many scientists. On this point deputy Prime Minister Aziz Abdulkhakov announced, as a result of hard work, the number of visitors to the country doubled in 2018. Moreover, Giorgi Gotev (2018) mentioned in his article about Uzbekistan that local authorities had 500 investment projects on offer which benefitted from easier procedures for acquiring plots of land and simplified procedures in terms of red tape. Abdulkhakov stressed that foreign investors had “unprecedented opportunities” to become pioneers in discovering a “hidden gem” and take part in a boom of “unprecedented dimensions and ambition”, with an expected double-digit growth in years to come (Bobur, & Alimova, 2017).

According to Lonely Planet “Uzbekistan saw a 40% increase year-on-year in tourism since 2017, and more growth is expected”. On this views Javlon Vakhobov, Ambas-

sador of Uzbekistan to the US states the same while making emphasis on the development in the republic of Uzbekistan. Also, in a paper by M.K. Pardaev (2018) called "Changes on tourism serve improvement of tourism in the Republic of Uzbekistan".

THEORITICAL BACKGROUND

In the modern global economy, the state of tourism largely depends on timely, in-depth analysis of trends and development factors, as well as relevant measures and reforms reflected in their results. We would like to show this statement using the example of the Republic of Uzbekistan.

As the results of the analysis show, in 2000 Uzbekistan accounted for only 0.04 percent of the international tourist flow and 0.006% of the total world income from international tourism, which is quite insignificant for a state with high tourist potential. Although from 2000 to 2018 positive growth trends of these indicators are noticeable, the number of these indicators was 0.4 and 0.08 percent, respectively, and exceeds their previous value 10 times. This comes from the fact that today in Uzbekistan, paying particular attention to the integrated development of the tourism industry, large-scale measures are being taken to simplify tourist formalities, improve the tourism infrastructure, create favorable conditions for the tourism business, expand the range of tourist services, improve the quality of service provided and diversification of the tourist product

DATA ANALYSES

The number of foreign visitors arriving in Uzbekistan in recent years has been growing at a high rate (Fig.-1). So, in 2017, 2,690 thousand foreign visitors entered the Republic of Uzbekistan. This figure is 32.7% more compared to 2016, when the number of arrivals was 2,027 thousand people. In turn, during 2018 the number of foreign visitors amounted to 5 346 thousand people and exceeded the figures for the same period in 2017 by 99%.

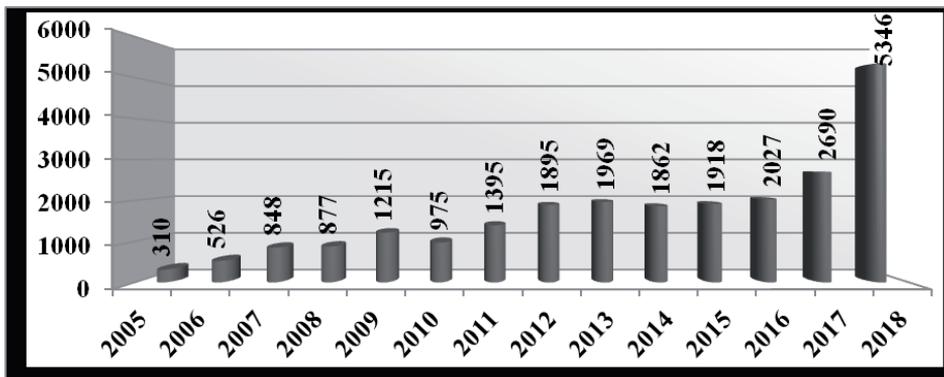


Fig. 1. The number of foreign visitors arriving in Uzbekistan.

As we know, tourism is subject to the influence of seasonal factors, as a consequence of periodic changes in climatic conditions during the year, it is the onset of cold periods, rains or excessive heat.

According to the results of the analysis, in 2018 in Uzbekistan the largest part of the arrival of foreign visitors accounted for the month of August, the smallest – for February. In general, the main part of the flow of tourists is almost evenly distributed in March-December, when the number of visitors exceeded more than 400 thousand people per month. Low flux is observed in January-February (Fig. 2).

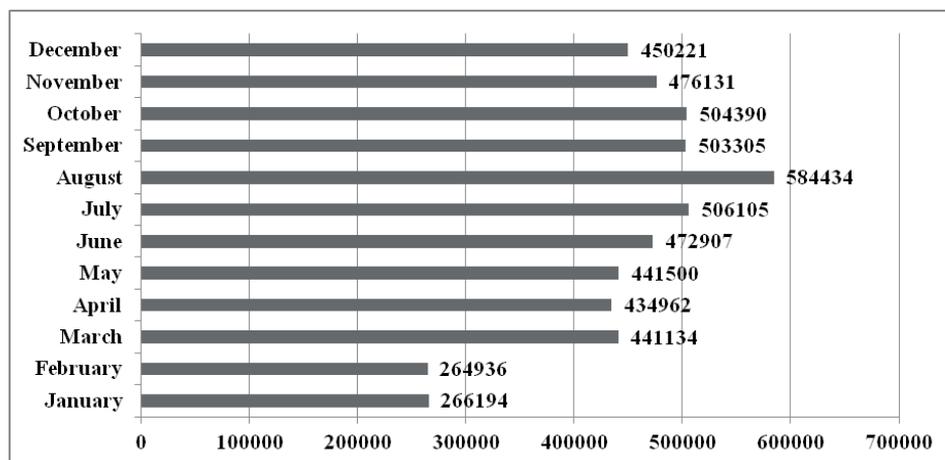


Fig.2. Arrival of foreign visitors by months in Uzbekistan.

One can notice the easing of seasonal fluctuations that come from the geography and purpose of visits to our country. The Central Asian region remains the leading guiding segment of the inbound tourism market of Uzbekistan. Visitors from the countries of this region make up 86.1% of foreign persons arriving in Uzbekistan (Fig. 3).

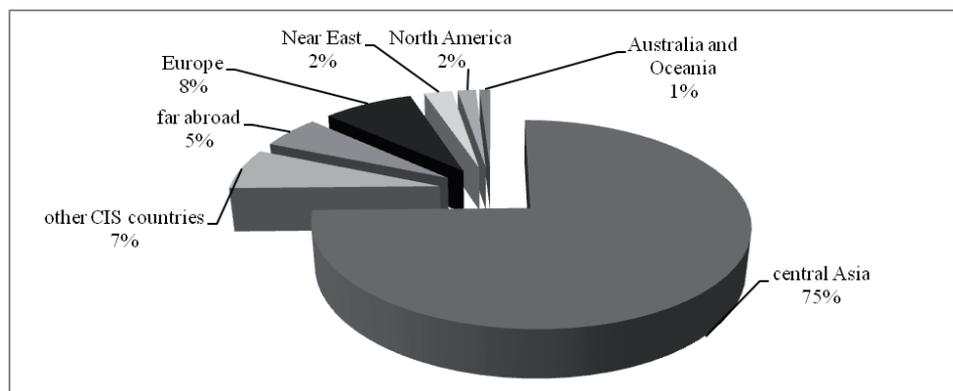


Fig. 3. Geography of consumption of the national tourist product in 2018.

According to statistics, the purpose of the visit to Uzbekistan of the main part of the visitors is to visit friends and relatives. This part is 88.1% of the total number of visitors. The second largest segment of visitors is 8.6%, who arrived in Uzbekistan for the purpose of vacationing, leisure and recreation (travel). The next is a group of visitors (1.1%) who arrived in Uzbekistan for business and professional purposes. Another 1% of visitors arrived for medical and health procedures and for shopping (commerce). The age group from 31 to 55 years is the largest number of visitors. Next are age categories up to 30 years old and from 56 years old and older (Fig. 4).

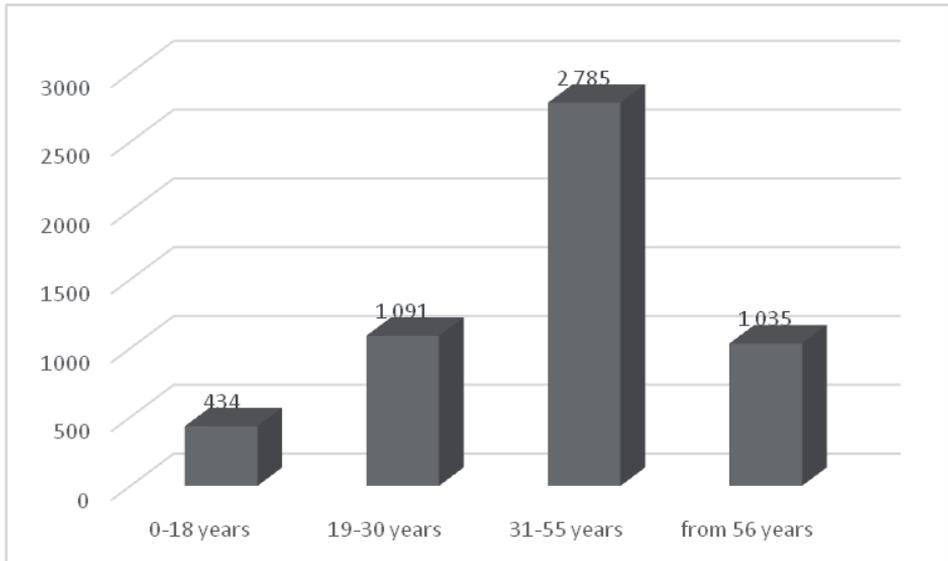


Fig. 4. The age structure of foreign consumers of the national tourist product in 2018.

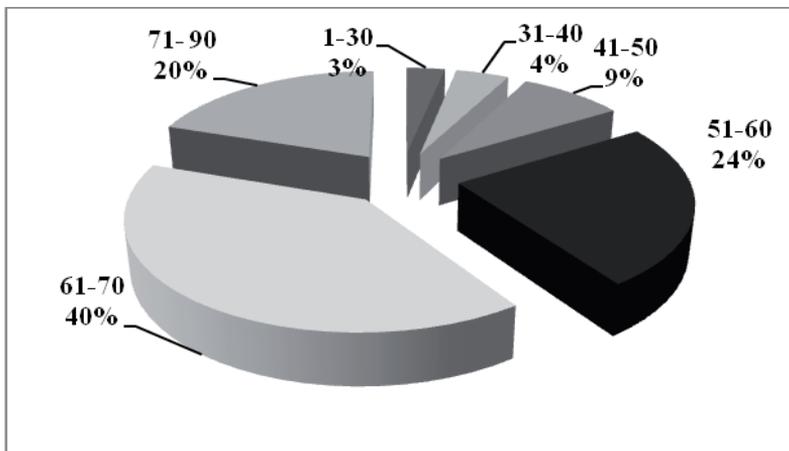


Fig. 5. The age structure of foreign consumers of the national tourist product in 2011.

Although studies conducted in 2011 showed that the demand for this segment of the national tourism market was formed by visitors aged 61 and above (Fig. 5). Large-scale work to diversify the national tourist product, are the result of the rejuvenation of the structure of demand for this type of product.

Separately, it is necessary to note the reforms that are underway for the development of domestic tourism, which provides increased supply by stimulating domestic demand in the tourism market.

In 2018, by the decision of the President, for the first time, the Program for the Development of Domestic Tourism, "Uzbekistan Beylab Sayogat Sil!", was approved.

To this end, in a number of public organisations, separate structures were created that deal with travel organisations in Uzbekistan. In general, within the framework of the program, "Uzbekistan has been organised by the O'zbekistan bo'ylab sayohat qil - Travel around Uzbekistan, a total of more than 15 million trips through domestic tourism were organised.

As part of the creation of additional amenities for travel starting from 2018, the decision of the Head of State introduced for the first time the order of long weekends during holidays (New Year, Navruz, Independence Day).

Also for domestic tourists established holiday discounts on rail and flights, hotel and other services. So, during the low tourist season (starting from November of this year) discounts of 10 to 50% were announced at 123 hotels, 54 transport organisations and 90 public nutritional facilities.

Important factors influencing the positive trends and significant results in the development of the tourism sector were the simplification of the visa regime, the rules for staying in Uzbekistan and doing business, the development of tourism infrastructure and the promotion of tourism potential.

Being a complex socio-economic system, tourism is influenced by numerous factors, whose role at each moment can be different both in strength and in duration of impact on the development of tourism. Therefore, their accounting is objectively necessary for the organisation of effective tourist activities. The foreign economic activity of the states, the integration and globalisation processes occurring at all levels of the world economy, which include tourist formalities, have a great influence on the tourism business (Osmanov, 2012; Wttc, 2011).

Tourist formalities associated with the crossing of state borders are an integral part of international tourism and act as its main feature. The more obstacles to the free movement of people who belong to tourist formalities, separating nations, have a significant impact on the development of tourist contacts.

2016-2019 years were marked by large-scale reforms in the sphere of tourism of the Republic of Uzbekistan. Over the past period, 55 regulatory and other acts in this area have been developed and adopted (Table 1).

Table 1.

The number of legal acts adopted during the 2016-2019 year on the reform of the tourism sector of the Republic of Uzbekistan.

Legal act	Quantity
Decisions of the Head of State	
Decrees of the President of the Republic of Uzbekistan	11
Resolutions of the President of the Republic of Uzbekistan	13
Orders of the President of the Republic of Uzbekistan	1
Government decisions	
Resolutions of the Cabinet of Ministers of the Republic of Uzbekistan	21
Orders of the Cabinet of Ministers of the Republic of Uzbekistan	8
Other documents	
Joint decisions	1

The current stage of large-scale reforms of the national economy of the Republic of Uzbekistan is based on the Action Strategy for the Further Development of the Republic of Uzbekistan. In the decree of the President of the Republic of Uzbekistan Sh.M. Mirziyoyev dated February 7, 2017 No. UP-4947 "On the Strategy for the Further Development of the Republic of Uzbekistan", one of the priority areas for the development of the national economy was "Accelerated development of the tourism industry, increasing its role and contribution to the economy, diversification and improvement of the quality of tourist services, expansion of tourist infrastructure". The start of a new stage in the development of tourism in Uzbekistan was approved by Decree of the President of the Republic of Uzbekistan dated December 2, 2016 No. 4861 "On Measures to Ensure Accelerated Development of the Tourism Sector of the Republic of Uzbekistan", which attached tourism as a strategic sector of the national economy.

The important factors that influenced the growth of tourist mobility in Uzbekistan were the simplification of the visa regime and the rules for staying in Uzbekistan. In this number it is important to note (Table 2):

1. Additional establishment of a visa-free regime for 55 countries (until 2018, citizens of 9 countries: Russia, Ukraine, Kazakhstan, Azerbaijan, Armenia, Belarus, Georgia, Kyrgyzstan and Moldova) did not need a visa to enter Uzbekistan. In February 2018, the head of state signed a decree on the introduction of a visa-free regime for a period of 30 days for citizens of seven countries – Israel, Indonesia, South Korea, Malaysia, Singapore, Turkey and Japan. In March, Tajikistan was added to this list, in October - France, from January 15 - Germany, from February 1, Uzbekistan introduced a visa-free regime for a period of 30 days for citizens of another 45 countries.

2. A simplified procedure for issuing tourist visas for citizens of 39 countries (until 2018, this list consisted of 11 countries) was introduced. The system for processing and issuing electronic entry visas began on February 1, 2019, and the list of countries was expanded to 76 countries whose citizens have the opportunity to obtain an electronic entry visa. In addition, from March 15, 2019, double and multiple electronic entry visas with a validity period of 30 days are introduced.
3. Additional (non-electronic) categories of entry visas have been introduced for certain groups of foreign citizens visiting the Republic of Uzbekistan (Table 3).
4. A procedure has been introduced for visa-free entry, temporary stay and exit from Uzbekistan through the checkpoints of citizens of 101 states transit through the territory of Uzbekistan.

Table 2.

Types of visa regime of the Republic of Uzbekistan used for tourism purposes.

Visa mode	Visa free	Transit visa	Visa free entry for persons under 16 years of age	E-Visa
<i>Number of countries</i>	64	101	All states	126
<i>Terms of consideration</i>	visa is not issued	a visa is not issued; when in circulation, a stamp is stamped on the document with a "transit" mark	visa is not issued	within 2 working days not counting the day of receiving the documents
<i>Actions duration</i>	30days	No more than 5 days	for the period of validity of the entry visa in the passport of the accompanying person, but not more than 90 days from the date of entry into the country	up to 30 days with a single entry and valid for 90 days from the date of its issuance

Table 3.

Additional (non-electronic) categories of entry visas for certain groups of foreign citizens visiting the Republic of Uzbekistan.

Categories	Terms of issue
Vatandosh	2-year visa for natives of the Republic of Uzbekistan and members of their families, if there are invitations from their relatives who are citizens of the Republic of Uzbekistan and permanently reside in its territory
Student visa	one-year visa, which is issued to foreign students studying in educational institutions located in the Republic of Uzbekistan, issued at the request of educational institutions, ministries, departments and organizations of the Republic of Uzbekistan, which are in charge of educational institutions
Academic visa	Visa for a period of 3 months to 2 years for foreign persons wishing to conduct research and teaching activities in the Republic of Uzbekistan issued at the request of the Academy of Sciences of the Republic of Uzbekistan, research organisations, higher educational institutions of the Republic of Uzbekistan, ministries or departments
Medical visa	visa for up to 3 months for foreign citizens entering the Republic of Uzbekistan for treatment at the invitation of the medical institution a pilgrim visa issued for up to 2 months to foreign citizens at the request of subjects of tourist activities and the Committee on Religious
Pilgrim visa	Affairs under the Cabinet of Ministers of the Republic of Uzbekistan to study the cultural, historical and religious and spiritual heritage, traditions of Uzbekistan

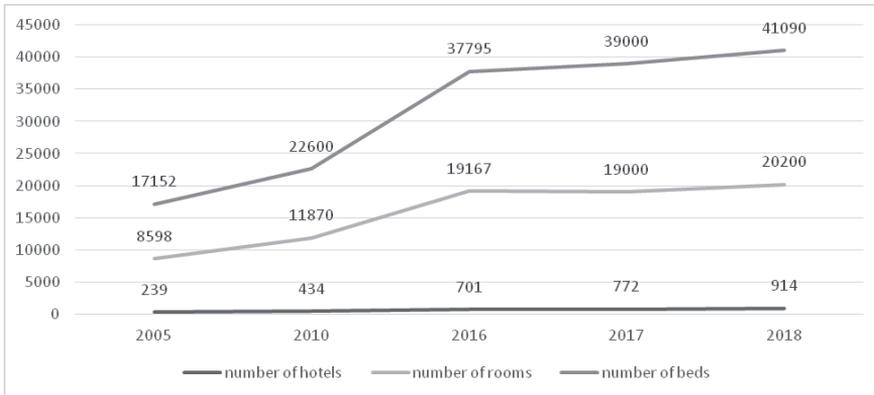
In addition, the successful development of tourism requires a sufficient level of development of many infrastructure elements: highways and railways, airports, communications, water supply and sewage, electricity.

Tourism infrastructure – a set of buildings, systems and services necessary for the functioning of tourism. Tourist infrastructure is a complex of existing facilities and networks for industrial, social and recreational purposes, intended for the functioning of the tourism sector.

Positive trends in the tourist flow are also observed due to the creation of favorable conditions, benefits and preferences for doing business, developing infrastructure in the field of tourism.

In order to create new jobs for the local population, develop ecological and rural tourism in the country, expand the types of services provided to tourists, a simplified procedure for organising family guest houses was adopted in August. So, the requirement of certification was canceled and the minimum requirements for the creation of guest houses were set. In addition, a preferential mechanism for the allocation of loans was introduced, when 50% of the interest rate of the loan is covered by the funds of the Tourist Support Fund. As a result, over the past period, more than 81 new guest houses have started their activities.

The measures taken to support and protect the private sector contributed to an increase in the number of tourist organisations from 398 in 2015 to 950 by the end of 2018, and hotel facilities from 661 to 900 units.



In order to create additional conditions for the development of transport infrastructure in the field of tourism by a government decision:

- tourist buses are exempted from the convoy escort obligation, provided that these buses meet safety requirements;
- the ban on the movement of a tourist bus at night has been lifted;
- the existing practice of compulsory drawing up by the territorial bodies of internal affairs of a vehicle inspection certificate renewed before each transportation of local tourist groups has been abolished;
- the procedure of certification of tourist-class vehicles imported into the republic, designed to carry 8 or more people, has been simplified.

In order to further diversify tourist products by the decision of the Cabinet of Ministers of the Republic of Uzbekistan, a number of reservoirs were opened to organise ecotourism. At the first stage, the organisation of ecotourism in 18 reservoirs located in Andijan, Jizzakh, Kashkadarya, Namangan, Samarkand, Surkhandarya, Tashkent and Fergana regions is envisaged.

In order to develop pilgrim tourism and promote the country’s potential in the countries of South-East Asia and in particular to Indonesia, Malaysia and Singapore, Tashkent-Jeddah flights were launched with connecting with Kuala-Lumpur-Tashkent flights twice a week from October 28, 2018.

Great influence on the development of international tourism has foreign economic activity of states, integration and globalisation processes occurring at all levels of the world economy.

In addition, the development of tourism infrastructure directly depends on the volume of investments directed to this industry.

An important factor in increasing the investment attractiveness of a separate tourist region is the creation on its territory of free economic zones of a tourist type. Uzbekistan has made the first step in using this experience.

In the framework of financing projects in the field of tourism, the State Committee on Tourism together with the EBRD began work on the implementation of

the project "Basis for the integration of cultural heritage". The total amount of the project financing is 330 million US dollars, of which 145 million US dollars will be allocated to support tourism entrepreneurship projects, 180 million US dollars to improve the infrastructure, and 5 million US dollars to preserve cultural heritage sites. With the successful completion of the project, it is planned to expand its geography to other regions of the republic.

November 19-21, 2018 The First International Investment Forum in the field of tourism was held. In particular, more than 200 participants from 36 countries. At the same time, investors showed particular interest from India, Turkey, China, Singapore, Germany. As a result of the Forum, 123 agreements and memoranda were signed, providing for the expansion of cooperation in the field of tourism and attracting foreign direct investment worth more than \$ 401.1 million

In order to further expand international cooperation in the field of tourism, 9 international agreements were signed (France, India, Egypt, Belarus, Spain, Kyrgyzstan, Tajikistan, etc.) on the development of cooperation in the field of tourism, incl. with UNWTO.

Also, special attention is paid to the development of international contacts of the tourist business. In particular, more than 20 business meetings of travel companies of Uzbekistan and Kazakhstan, Belarus, the Russian Federation, the People's Republic of China, India, etc. were organised both as part of top-level visits and the work of Intergovernmental Commissions and individual events.

Participation in meetings of 16 Intergovernmental Commissions on trade, economic, cultural and humanitarian cooperation with such countries as India, Russia, Egypt, Belarus, Japan, Lithuania, Spain, Germany, United Arab Emirates, Oman, Kazakhstan, Bulgaria, Kyrgyzstan, Tajikistan, France, Vietnam, who also took part in the meeting of "Uzbekistan-EU".

As part of the official visits of the Uzbek delegations to foreign countries, visits of the leadership of the State Committee on Tourism to Spain, Tajikistan, Germany, Russia, Kazakhstan, Pakistan, Japan, Georgia and Belarus were organised. A series of bilateral meetings with foreign partners including heads of diplomatic missions of foreign countries in Uzbekistan (Republic of Korea, Japan, Turkey, Germany, Malaysia, Indonesia, the United Arab Emirates, Kazakhstan, Kyrgyzstan, etc.).

In a market economy, the practical application of modern forms of personnel management and the training of qualified personnel in the field of tourism are of particular importance. Qualified, trained, motivated people to a greater extent determine success in business.

The main achievement in 2018 in this direction is the adoption of the Decree of the President of the Republic of Uzbekistan "On the establishment of the International University of Tourism Silk Road" No. 3815 of June 28, 2018. An agreement was reached on signing an agreement on cooperation between the State Tourism Committee and the United Nations World Tourism Organization (UNWTO), recognising the status of a university as international, giving the university the right to use the UNWTO logo, and recognising it as an official partner.

On January 5, 2019, the normative acts important for the sphere were adopted – Decree of the President of the Republic of Uzbekistan No. UP-5611 "On Additio-

Table 4.
The main directions of tourism development.

The main directions of development	Target tasks and parameters
1 Improving the regulatory framework in the field of tourism, the implementation of international norms and standards aimed at creating favorable conditions for the development of the tourism industry	The implementation of the above measures will ensure the harmonisation of the domestic regulatory framework with international standards and norms, create favorable conditions for the development of the tourism industry, ensure efficient use of economic resources to enhance the role of this industry in the economy, including ensuring the growth of tourism exports from 951 in 2025 million to 2.2 billion US dollars.
2 Development of tourism infrastructure and related infrastructure in all regions of the republic, taking into account the needs and demands of tourists	Implementation of these measures will allow: development of the tourist infrastructure in accordance with international standards by increasing the number of tour operators from 860 to 1 676 units and other subjects of the tourism industry, and the number of accommodation facilities from 850 to 3 000.
3 Development of transport logistics, expansion of external and internal routes, improvement of the quality of transport services	The implementation of the above measures will allow: expansion of the international geography of flights and direct flights, including to the historical cities of the country, to improve the quality and reduce the cost of air travel; Provision of convenient and affordable transport logistics, including air, rail and road transport, to create comfortable conditions for traveling between regions of the country and foreign countries; to turn the country into a major regional transport "hub" in the field of passenger transport.
4 The adoption of comprehensive measures to reduce the influence of the seasonal factor through the diversification of the tourist product and services focused on various segments of the tourist market	The implementation of the above measures will allow the increase of the attractiveness of the proposed tours by saturating them with event activities and combining various types of tourism, increasing the average duration of tours in the country for at least two days to 8 days, and for cities for 3 days from current 1.5 - 2, 0;
5 The development of domestic tourism, providing incentives for the activity of subjects of tourism activities, focused on meeting the needs for tourist services within the country.	to ensure the sustainable development of tourism and the achievement of repeat visits of visitors to the country.
6 Promotion of the tourist product of the Republic of Uzbekistan in the domestic and foreign tourist markets, strengthening the country's image as a safe for travel and recreation.	The implementation of the above measures will allow efficient use of domestic resources to form a high-quality tourist product, reduce dependence on seasonal factors and increase the workload of hotels, especially in non-seasonal months of the year;
7 Improving the system of training highly qualified specialists, re-training and advanced training of workers providing services.	Expand the flow of domestic tourists between regions with an increase in their number from 14 million to 25 million per year.

nal Measures for Accelerated Development of Tourism in the Republic of Uzbekistan" and Decree of the President of the Republic of Uzbekistan No. PP-4095 from 05.01.2019, "On measures to accelerate the development of the tourism industry." These regulations set out the main strategic directions for the development of the tourism sector, and set tasks. In particular the Decree of the President of the Republic of Uzbekistan No. UP-5611 approved the Concept of development of the tourism sector in the period up to 2025 with the annual adoption of a plan of specific measures for the implementation of the Concept (Table 4).

CONCLUSION

The strategic goal of developing tourism in Uzbekistan in 2021-2025 is to increase the share of tourism in the gross domestic product of the country to 5 percent (2.3% by the end of 2017) and also to attract more than 9 million tourists by the end of 2025, including 2 million from non-CIS countries, by developing the necessary infrastructure and successfully promoting the republic's tourist potential on world markets. At present (in the beginning of 2019), the number of seats in the installation is 47.8 thousand. By 2025 this indicator will reach 132.4 thousand. This shows that we have the same opportunity to wait for up to one day at the same time. This indicator is projected to increase by 2.77 times ($132.4 / 47.8$) over the past seven years. However, this indicator is relatively low compared to the country's needs. If travel tourism develops, it is predicted that there will be more travelers coming from the Muslim world. Therefore, it is necessary to accelerate the construction of the Hotel and similar facilities. To conclude, Uzbekistan has great chance to be one of the most developed tourism countries for upcoming years. Facilitations and other regulations of the administration are directed to attract a tourist boom from all around the world. Consequently, lifestyle of people will be improved, unemployment will be decreased and new job places will help people to have better life from the travel and tourism industry.

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