

EVALUATING THE ECONOMIC IMPACT OF TOURISM DEVELOPMENT IN UZBEKISTAN: A COMPREHENSIVE ANALYSIS

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Annotation. Uzbekistan possesses considerable tourism potential and has garnered increased international recognition in recent years. The government has demonstrated noteworthy commitment to its development, yielding positive outcomes. This article conducts a comprehensive analysis encompassing the present state of affairs, and the prospective measures undertaken by the nation to rejuvenate its tourism industry. Additionally, specific recommendations for enhancing tourism within the country are delineated herein.

Keywords: tourism, tourist, tourism product, destination, tourist flow, inbound tourism, tourism potential, tourism opportunity.

Introduction

Tourism has emerged as a pivotal sector within the framework of the global services market, attaining preeminence in economic efficacy and surpassing industries of considerable magnitude,

such as oil production and the automotive sector. Beyond its role as a potent instrument for economic advancement, tourism is an influential determinant in shaping the perception of a specific region, projecting future accomplishments, and disseminating its historical narrative.

Primarily, tourism exerts its most profound impact on a nation's economic development. The conceptualization and evaluation of distinct states' tourism and recreational potential constitute a multifaceted undertaking marked by inherent complexity and a lack of unequivocal interpretation. This complexity is rooted in the diverse origins and essence of the cultural, natural, and historical heritage that underpins the tourism potential of each country. Furthermore, external political, economic, legal, cultural, social, and psychological factors significantly impinge upon the ultimate indicators measuring the appeal of a tourist destination.

Contemporary circumstances underscore the escalating global significance of tourism, underscored by its growing influence on individuals' lives and the overall economies of nations. Predominantly sold with minimal losses, services in the tourism sector are increasingly shaping the world economy, distinguishing themselves by their capacity to generate the highest value added. In the context of modern market economies, travel companies are progressively recognizing the imperative to develop innovative services and products, underscoring the escalating role of tourism on a global scale.

Tourism is a paramount sector in the global economy, playing a pivotal role as a significant source of income, export commodity, and a major employer, contributing to over 255 million jobs, constituting 10.7% of the global labor force in 2024 year. Particularly for developing nations, tourism holds strategic importance in economic diversification and employment generation.

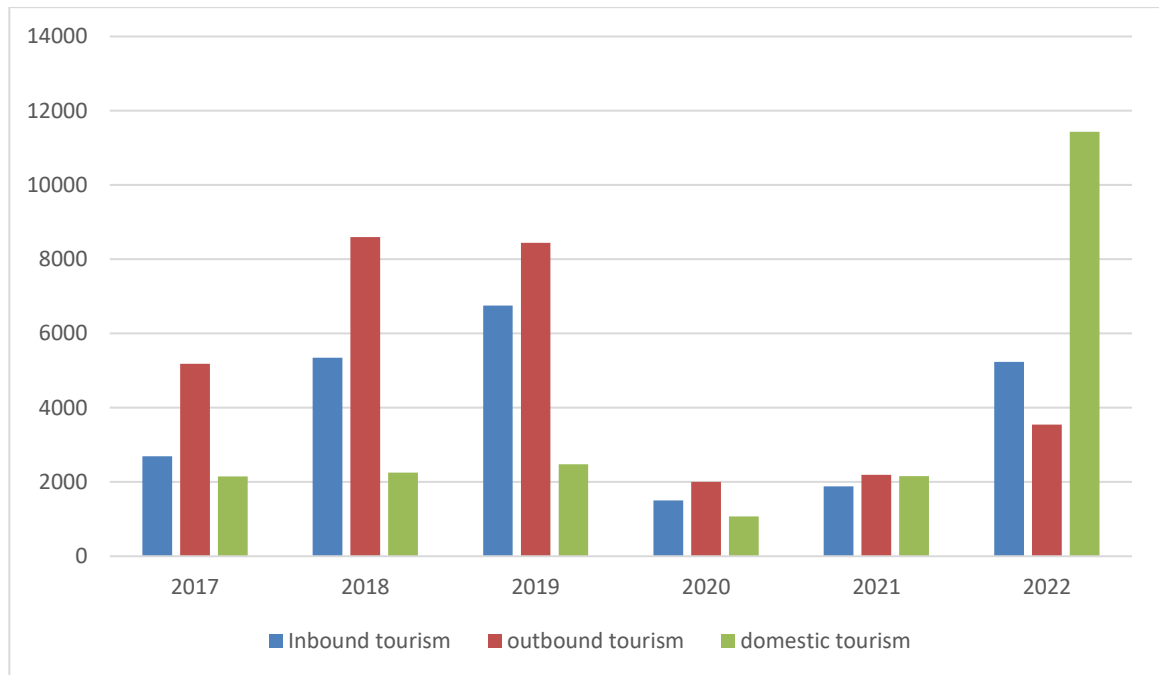
Uzbekistan, endowed with abundant resources, possesses the potential to cultivate various forms of tourism. The nation's rich cultural and historical heritage, coupled with ancient traditions in crafts and art, positions it attractively for enthusiasts of cultural, educational, archaeological, and ethnographic tourism. Additionally, significant religious sites affiliated with Islam, Christianity, and Buddhism establish a foundation for the development of pilgrimage tourism. Uzbekistan's diverse natural landscapes, encompassing lakes, mountain peaks, river floodplain forests, steppe, and desert environments, provide a basis for expanding ecological and adventure tourism.

The attainment of independence by Uzbekistan marked a pivotal juncture in establishing an autonomous tourism industry. After organizational and structural reforms, a novel state regulation system emerged, fostering conditions conducive to infrastructure development and ensuring the protection and restoration of cultural and historical landmarks. Concurrently, the institutions and relationships within the international tourism market underwent substantial restructuring, leading to an influx of foreign tourists, with annual growth rates reaching up to 25% in specific periods. However, this upward trajectory has witnessed recent reversals, with a notable decline in tourist arrivals.

This analytical exposition scrutinizes the primary impediments restricting the comprehensive and efficient utilization of Uzbekistan's tourism resources. Furthermore, it endeavors to proffer recommendations for addressing the identified challenges through public policy initiatives. Notably, this document deliberately omits discussion of issues pertinent to the private tourism sector, which are appropriately addressed through market mechanisms.

Over the past five years, the number of people in inbound tourism has decreased by 0.7 times, amounting to 1881.3 thousand people in 2021 and the number of trips abroad reached 2194.8 thousand citizens of Uzbekistan (0.4 times less compared to 2017). The number of persons served within the country in 2021 reached 2162.7 thousand.

1-table. Indicators of tourist flow in Uzbekistan for 2017-2022



Source: https://stat.uz/images/uploads/reliz2021/turizim_28_07_22_ru.pdf

The table intentionally omits to address issues, albeit significant for the sector, resolved through market mechanisms within the private tourism industry. Consequently, this article focuses on elucidating the challenges associated with the absence of a cohesive tourism policy and strategic planning at the governmental level, specifically within the republic. This encompasses legislative deficiencies and the need to reform state mechanisms controlling and regulating the tourism sector.

Factors substantially diminishing Uzbekistan's appeal to foreign tourists encompass deficiencies in the passenger air transportation market, bureaucratic impediments in border and customs procedures, stringent visa regulations, and constraints associated with the conditions of staying within the country.

Uzbekistan has been actively working to develop its tourism sector, aiming to attract more international visitors and diversify its economy. The country is known for its rich history, ancient cities, and Silk Road heritage, making it a fascinating destination for travelers. Key attractions include the historic cities of Samarkand, Bukhara, and Khiva, each showcasing unique architecture, culture, and traditions.

Tourism Opportunities and Trends:

Cultural Heritage: Uzbekistan's historical and cultural heritage, particularly its Silk Road sites, attracts tourists. The government has invested in preserving and promoting these landmarks to enhance the visitor experience.

Visa Reforms: Uzbekistan has implemented visa reforms to make it easier for tourists to visit the country. The introduction of e-visas and visa-free regimes for certain nationalities has contributed to an increase in visitor numbers.

Infrastructure Development: The government has invested in improving tourism infrastructure, including transportation, accommodation, and tourist facilities. This includes the development of new hotels, airports, and tourist services.

Diversification of Tourism Products: Efforts have been made to diversify tourism offerings beyond historical and cultural attractions. This includes promoting ecotourism,

adventure tourism, and culinary tourism to attract more travelers.

Marketing and Promotion: Uzbekistan has engaged in marketing and promotional campaigns to raise awareness about its tourism potential. Participating in international travel fairs and events has helped showcase the country to a global audience.

Tour Operators and Opportunities:

Emerging Tour Operators: Tourism growth has led to the emergence of new tour operators within Uzbekistan. These operators offer a variety of packages catering to tourists' interests and preferences.

Collaboration with International Tour Operators: International tour operators can help Uzbekistan tap into established networks and attract tourists from various countries. Building partnerships with reputable operators can enhance the visibility of the destination.

Customized Tours: Tour operators can capitalize on Uzbekistan's diverse offerings by creating specialized and customized tours. This may include cultural excursions, adventure packages, or themed tours.

Digital Platforms: Leveraging digital platforms for marketing and booking has become increasingly important. Tour operators can utilize online platforms to reach a broader audience and streamline the booking process. In numerous instances, local stakeholders lack a coherent comprehension of the demand characteristics for tourism services and products, as well as the requisite types of services to meet the needs of tourists adequately. The capacity to influence demand is contingent upon the depth of understanding the supplier of services possesses regarding customers, their needs, and preferences. Remarkably absent are published findings from studies delineating the profile of foreign tourists in Uzbekistan. Each travel company discerns such a profile by examining its clientele, a methodology inherently insufficient for constructing a comprehensive overview of the demographic origins, purposes, and preferences of individuals visiting Uzbekistan.

Addressing this challenge necessitates collaborative endeavors involving the state, industry associations, and the private sector. The compilation of information about foreign tourists arriving in the country should be centralized within a unified information system accessible to all market participants. This involves continual mandatory monitoring of tourist flows and the systematic execution of market research, activities best coordinated by governmental bodies tasked with overseeing tourism development.

As per data supplied by Uzbek tour operators, amongst foreign citizens arriving for recreational purposes, a prevalence of middle-aged and elderly visitors is observed, constituting nearly 90% of tourists. Their focus is visiting cultural attractions, notably following the established tourist route from Tashkent to Samarkand, Bukhara, and Khiva—a standard package promoted by local travel agencies. Such a trend implies suboptimal exploitation of Uzbekistan's tourism potential and unfavorable prospects for its development, as most foreign visitors arrive not solely to explore tourism destinations. Moreover, those who do are confined to a single journey along the aforementioned standardized route. Elderly tourists, while discerning in matters of comfort, exhibit a reluctance to expend financial resources comparable to younger demographics.

The lifestyle disparities between modern youth and the older generation, particularly within Western civilization, underscore the imperative of devising strategies to broaden the demand base for Uzbekistan's tourism products. This necessitates attracting the most active tourists, encompassing both young and middle-aged demographics. Timely, decisive, effective, and economically viable measures are indispensable for achieving this objective, particularly in light of the intense competition among tourist destination countries. Crucially, efforts should be directed not only towards attracting tourists but also towards ensuring that those who have visited Uzbekistan once are inclined to return and advocate for the country as a compelling destination.

Even though the tourism industry has been declared one of the priorities for the country's

economic development, its potential opportunities are underestimated. There is still no specific policy for tourism development. In particular, no tourism development strategy would optimize activities and resources to develop the tourism sector.

Considering this, developing a clear tourism policy and strategy becomes critical to compete in the global market. In addition, one of the features of this sector is that there is very high competition between tourism destinations, and every year, a new destination appears on the international market, trying to attract new tourists. Thus, strategic planning for tourism development is a crucial task, the solution of which will help fight against competitors and contemporary problems of the existing tourism industry. Uzbekistan needs to develop and implement a detailed Master Plan for tourism development.

The master plan should determine the main directions for the development of the tourism industry, including the development and offering of a “branded” tourism product for each of the regions of Uzbekistan, infrastructure development and improving the quality of goods and services, building institutional capacity, educational events, etc. This strategy should also consider preserving the environment and cultural heritage as a prerequisite for long-term tourism development.

There is no national advertising campaign to promote tourism products, and tourism sector participants carry out promotional activities individually and without coordination, thereby significantly reducing the impact of activities to promote Uzbekistan as a tourist destination. The country remains unknown in many tourism markets, especially in Europe, tourists face problems finding information about tourist attractions, hotels, and other tourism services provided by local market participants. A similar situation also exists at the local level. There is a lack of tourist information (no brochures, maps for tourists and others) and often, some attractions are unknown, even to local participants in the tourism market.

To make the marketing and promotion of Uzbekistan as to make an international tourism destination effective, a coordinated and structured approach must be taken at national and regional levels. A Marketing Plan for tourism development in Uzbekistan should be developed, including regional plans. In addition, Uzbekistan's marketing and promotion plans should be developed jointly with local authorities, self-government and the private sector. The plan should also take into account the role of information technology in promoting tourism and the country as a tourism destination. Uzbekistan must be represented in significant markets, forming tourist flows for the country. Since the creation of foreign representative offices of the most authorized tourism body requires substantial financial resources, it makes sense to provide positions of tourism specialists in the embassies or trade missions of Uzbekistan in the relevant countries, whose functions will include establishing contacts with interested organizations to disseminate information about Uzbekistan and attract foreign tourists to the government. Foreign representative offices of the National Airline “Uzbekistan Airways” are also well suited for this purpose.

But only on the condition that the airline's policy is more consistent with tourism development interests.

The private sector has and will continue to play an essential role in developing and promoting tourism. Still, international campaigns to promote the tourism product of Uzbekistan as a whole are the public sector's responsibility due to their high cost.

The efficacy of measures aimed at stimulating demand and attracting tourists is compromised by persisting administrative barriers obstructing the flow of tourists. The extant visa regime remains a formidable impediment to the influx of tourists into the country. Critical drawbacks of the prevailing visa issuance procedure include:

- 1. There is impracticality in securing a visa upon arrival at the airport, with a consular office exclusively situated at the Tashkent airport, issuing visas only in exceptional cases. Tourists are mandated to obtain visas at a consular office of Uzbekistan located abroad.*
- 2. When no consular office of Uzbekistan is present in a given country, the necessity to*

acquire a visa at the nearest consular office in another country arises.

3. The imperative is to await an appointment with an official from the consular office of the Republic of Uzbekistan at the institution's location.

4. Non-compliance with the stipulated three-day deadline for issuing tourist visas and prolonged deadlines as per bilateral interstate agreements.

5. Subpar quality of consular services and manifestations of monopolistic and rent-seeking behavior in their provision.

6. Elevated cost of individual visas, amounting to 40 euros for Europeans, an average of 60 dollars for citizens of other countries, and 100 dollars for US citizens.

7. Visa extension documents are processed solely in Tashkent.

Optimizing visa procedures for tourists from economically and politically stable countries is imperative. This involves reducing the processing time for tourist visas, streamlining customs procedures, and lowering the cost of a tourist visa for the Republic of Uzbekistan. Since the country primarily attracts middle-aged and older individuals, exempting persons over 60 from visa requirements, especially those from major tourist-supplying countries, is a potential solution.

Moreover, expanding the utilization of practices such as accepting documents via mail and online submission for visa applications should be considered. Establishing a practical visa issuance system upon arrival at airports and other border checkpoints is paramount.

Customs and border procedures also pose significant barriers to entry. The arduous process of navigating border and customs formalities at Tashkent airport requires attention, taking an average of about two hours. Other tourist airports in Uzbekistan lack adequate facilities to handle procedures for large groups of foreign tourists efficiently and efficiently.

While capital investment is essential for the re-equipment passport control and customs inspection areas at airports, immediate organizational improvements can be implemented. Differentiating the flow of arriving passengers based on cargo weight, ensuring the operation of all passport control points and customs terminals during peak arrival periods, and enhancing the organization of services for baggage reception, delivery, and processing are essential.

It is crucial to provide tourists with comprehensive information about Uzbekistan's customs and border regulations before departing from their home country. Additionally, disseminating information about the rights and obligations during entry formalities and establishing an information and reference service at major checkpoints would facilitate resolution in case of disputes or uncertainties.

The quality of goods and services provided to tourists is primarily contingent upon private enterprises responsible for their production. However, various overarching conditions, such as infrastructure, access to resources, and regulatory constraints on specific activities, exert an influence on service quality and are subject to the jurisdiction of both central and local authorities.

Presently, Uzbekistan offers three principal tourism products, with a focus on its significant cultural sites, positioning the country as a historical gateway to the region. These products encompass heritage tourism (emphasizing cultural and educational aspects), thematic tourism, pilgrimage tourism, and ecotourism.

Cultural heritage tourism currently stands as the foremost tourism product within the domestic market. Local tour operators offer a diverse range of tour packages, predominantly featuring popular destinations such as Tashkent, Samarkand, Bukhara, and Khiva. Nevertheless, considerable potential for product diversification exists, given the underutilization of other tourism destinations, including archaeological sites in Termez and the ancient Khorezm region.

Thematic tourism is gaining prominence as tour operators endeavor to broaden their offerings, incorporating adventure and sports tourism packages, such as camel treks and desert or mountain tours. This category also encompasses event tourism, with an increasing popularity of cultural festivals and events in Uzbekistan's ancient cities. However, effective global advertising is crucial to ensure sustained interest in these events, necessitating collaboration between tourism

development authorities, local governments, and the private sector.

Pilgrimage tourism thrives due to the presence of unique sites revered by followers of Islam, Christianity, and Buddhism. The government has recognized the potential of this tourism product and is actively stimulating its development. Despite positive examples of diversification, such as pilgrimage tourism, untapped opportunities exist, such as utilizing the capital's large hotels for international seminars and conferences.

The country holds substantial potential for eco-tourism, yet the existing reserves, approximately twenty in number, are underutilized for scientific research and ecological tourism. Current tours within protected natural sites often result in damage to natural and cultural heritage, prompting protective measures by local governments. However, foreign experiences demonstrate that national parks can simultaneously contribute to scientific knowledge, generate income for entrepreneurs and the state, and serve as custodians of natural and cultural heritage.

Recognizing the transit advantages afforded by Uzbekistan's geographical location for passengers and cargo, there is a need for government support to transform the nation into a strategic transit point. Comparable to Singapore's evolution into a financial and tourist hub, Uzbekistan's success hinges on robust airport infrastructure, favorable customs legislation, and governmental encouragement for transit between Europe and Asia. Addressing these considerations is imperative for realizing Uzbekistan's potential in becoming a thriving transit, financial and tourist center.

Based on the conducted research, which incorporates interviews with representatives from the private sector, the current landscape in the provision of tourism services can be delineated as follows.

a) Tour Guides:

The country boasts a considerable number of tour guides possessing a reasonable level of expertise, primarily specializing in guiding cultural site tours.

However, a limited number of guides focus on destinations beyond the established tourist routes.

b) Museum Services:

The organizational structure of museum services is currently suboptimal. Prominent museums are situated in Tashkent and other key tourist cities, some established through collaborations with international entities such as UNESCO.

Most museums exhibit inadequacies, featuring outdated technical infrastructure, scant information offerings (often available only in Uzbek and Russian), and minimal efforts to attract tourists.

Addressing these challenges necessitates the formulation of a comprehensive state program for museum development in Uzbekistan. Such a program should encompass measures to enhance services, upgrade facilities, disseminate information, and identify funding sources. Potential avenues include transferring certain museums to non-governmental non-profit organizations or private entities, as well as the collaborative management of select museums by local authorities, scientific, and educational institutions.

c) Entertainment and Diversification:

Despite the richness of attractions in the country's primary tourist destinations, there is a noticeable dearth of entertainment options, especially beyond Tashkent.

Tour operators frequently express challenges in diversifying tourists' leisure activities beyond traditional sightseeing.

d) Financial Services Sector:

The financial services sector receives significant criticism, primarily due to the insufficient availability of ATMs and challenges in utilizing credit cards owing to the absence of terminals at various trade and service establishments.

ATM services are predominantly confined to major five-star hotels, limiting accessibility.

Making credit card payments outside of Tashkent is nearly non-existent, and establishments accepting cards often impose significantly higher prices compared to cash transactions at other merchants.

The underdeveloped service sector results in missed revenue opportunities. While international cultural and leisure tourists typically spend an average of \$130-160 per day, Uzbekistan witnesses an estimated average expenditure of \$90 per day per tourist. This implies that local tourism businesses forego at least US\$40 per day per tourist, underscoring the potential economic gains that could be realized with an enhanced service infrastructure.

Conclusion

The conducted research and analysis of the tourism sector in Uzbekistan reveal a latent potential that can be harnessed to enhance competitiveness and increase export earnings. However, this potential can only be fully realized through an improvement in the system of government regulation, fostering the complete development of market relations, and prioritizing the diversification and qualitative enhancement of the tourism product offered on the international market. A collaborative effort among all stakeholders in the tourism sector, including businesses, government entities, and international experts, is imperative to infuse dynamism into the country's tourism industry. To expedite the development of the tourism sector and garner state support for small businesses and private entrepreneurship, the following recommendations are proposed:

1. Formulation of Clear Policies and Strategies:

Develop a comprehensive Master Plan for Tourism Development of Uzbekistan, outlining short-term and long-term plans that actively involve all stakeholders in the tourism market.

The strategy should focus on qualitative development and diversification of the tourism product, infrastructure development, building institutional capacity, and formulating a national-level marketing policy.

2. Enhanced Statistical Information Management:

Introduce the Tourism Satellite Account (TSA) system into the national system of accounts to establish a modern system for collecting, analyzing, and disseminating statistical information on tourism. Empower the National Tourism Administration of Uzbekistan with functions, powers, and status akin to similar institutions in developed tourism countries.

3. Privatization and Investment Competition:

Resolve the management issues of Committee on Tourism under the Ministry of Ecology, Environmental Protection and Climate Change of the Republic of Uzbekistan by privatizing hotel complexes through investment competitions. Conditions should consider hotels' debts to creditors, and funds from privatization should contribute to tourism development.

4. Facilitating Accessibility for Foreign Visitors:

Streamline the visa application process by reducing processing time, providing flexibility in choosing visa receipt locations, and exploring options for passport delivery by mail. Enhance the quality of services and reduce travel time for border and customs procedures to make Uzbekistan easily accessible.

5. Licensing and Certification Optimization:

Implement compulsory licensing only for activities related to organizing travel and related services, conducted by the territorial division of the authorized state body for tourism. Abandon mandatory certification of tourist facilities in favor of a categorized system assigned through certification.

6. Comprehensive Services for Tourists:

Implement measures to ensure comprehensive services at entry and exit points for foreign tourists, as well as along their travel routes. Incentivize private businesses to develop service facilities along major highways.

7. Local Authorities' Support for Small Tourism Businesses:

Encourage local authorities to support the development of small tourism businesses by

providing premises and assisting in the development of communal infrastructure. By incorporating these recommendations into the national tourism development strategy, Uzbekistan has the potential to unlock its tourism sector's latent capabilities and position itself as a vibrant and competitive destination on the international stage.

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