

World Tourism Organization



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Uzbekistan Tourism Insight

Findings from the
Uzbekistan International
Visitor Survey 2014

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Uzbekistan Tourism Insight – Findings from the Uzbekistan International Visitor Economy Survey 2014 and National Tourism Satellite Accounts

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Overview

The findings presented in this report are provided from the *Uzbekistan International Visitor Economy Survey 2014* study undertaken in collaboration with the National Company Uzbektourism and the World Tourism Organisation (UNWTO).

The data presented in this report provides findings and a snapshot of the state of the visitor economy in the Republic of Uzbekistan, an iconic destination along the Silk Road. It is recommended that further market research is undertaken to analyse the trends identified in this report in more-depth along with implementing annual research instruments to continue to build upon this inaugural research.

The information provided is supported by data from the World Tourism Organization (UNWTO) and national satellite accounts.

Methodology

A 29 question survey entitled *Uzbekistan International Visitor Economy Survey 2014* was prepared and distributed to four hundred international tourists who were targeted visiting popular destinations within Uzbekistan. A total of two hundred and eighty one surveys were eligible for analysis.

The survey was designed using a range of question styles including multiple choice, open-ended questions and Likert scales. To be eligible, respondents must have stayed one night in the Republic of Uzbekistan and be a resident of a country other than Republic of Uzbekistan.

Key findings

- International arrivals to the Republic of Uzbekistan have increased from 1.2 million in 2009 to 2 million in 2013, with visitors from the Commonwealth of Independent States (CIS) representing 91% of all arrivals to the country predominantly for the purpose of visiting friends and family (Republic of Uzbekistan, 2014; UNWTO, 2014).
- International visitors for the purpose of tourism accounted for 8% of all arrivals, with the Russian Federation, Republic of Turkey and Republic of India representing the three largest source markets. Visitors from Germany and the Republic of Korea represented the largest inbound markets from Europe and Asia and the Pacific respectively (Republic of Uzbekistan, 2014)

- Surveyed international tourists were predominately European, aged 55 years and older with a high level of education, and were travelling to the Republic of Uzbekistan for the first time on paid holidays from their career jobs or were retired. The majority of respondents (63%) were travelling as part of a pre-purchased tour.
- Average daily expenditure per person was recorded at USD 325 with accommodation, shopping and tours representing the three highest areas of expenditure.¹ Findings suggest that the average trip expenditure was USD 3321 per person whilst touring in the Republic of Uzbekistan, with 72% of respondents indicating that the Republic of Uzbekistan offered good value for their travel budgets.
- The majority of surveyed respondents indicated that they prefer flexibility when travelling within the Republic of Uzbekistan, whether this be as a packaged holiday or independently, however many tourists are seeking tourism products and experiences that provide a level of comfortability and familiarity.
- Visiting museums and galleries, and undertaking guided tours and shopping excursions were the three most popular experiences that tourists actively sought or participated in when travelling to the Republic of Uzbekistan. A UNESCO World Heritage Listing was considered a significant influence in visitation for 77% of all surveyed tourists, with the strongest influence in respondents aged 55 years and over.
- An average length of stay of 10.2 nights was recorded, with the majority of this time spent in the cities of Tashkent, Samarkand and Bukhara. Surveyed tourists had a high likelihood of travelling to another destination before or after their travels in the Republic of Uzbekistan, along with a high preference for travel to countries within the Central Asian region.
- Uzbekistan Airways, Turkish Airlines and Aeroflot were the three most flown airlines that respondents used to travel to the Republic of Uzbekistan, with 74% of all surveyed tourists entering the country at Tashkent International Airport.
- Findings indicated that the majority of surveyed tourists preferred to stay in and use locally owned accommodation and restaurants as it provided a more authentic experience and that the money they spent goes directly to the community.
- The Internet and guidebooks represented the most influential and highest used information sources amongst surveyed tourists when deciding to visit the Republic of Uzbekistan and whilst travelling within the country.
- Findings indicate a high usage of digital technologies whilst travelling in the Republic of Uzbekistan amongst respondents aged 17 to 44 years, with an average of 67% of this age segment engaging in digital activities such as emailing, using social media and accessing the Internet via their mobile devices.

¹ Excludes airfares and package expenditure.

- The majority of respondents were happy with the overall quality of transportation and tour product standards, service provision and accommodation lodgings during their time in the Republic of Uzbekistan.
- The low standard of roads and infrastructure, visa and border crossing procedures, limited tourist information, language barriers and difficulties in accessing cash through ATMs and credit card facilities were identified as the main concerns voiced by the surveyed respondents in regards to travel in the Republic of Uzbekistan.
- 83% of international tourists surveyed suggested that they felt safe whilst travelling in the Republic of Uzbekistan and 76% would recommend the destination to friends.
- Silk Road culture and heritage played an important role in attracting visitors to the Republic of Uzbekistan, with 81% of international tourists surveyed indicating that they were attracted to the destination due to its historical connection to the Silk Road.
- The majority of respondents (89%) indicated that the peoples of the Republic of Uzbekistan have been very welcoming

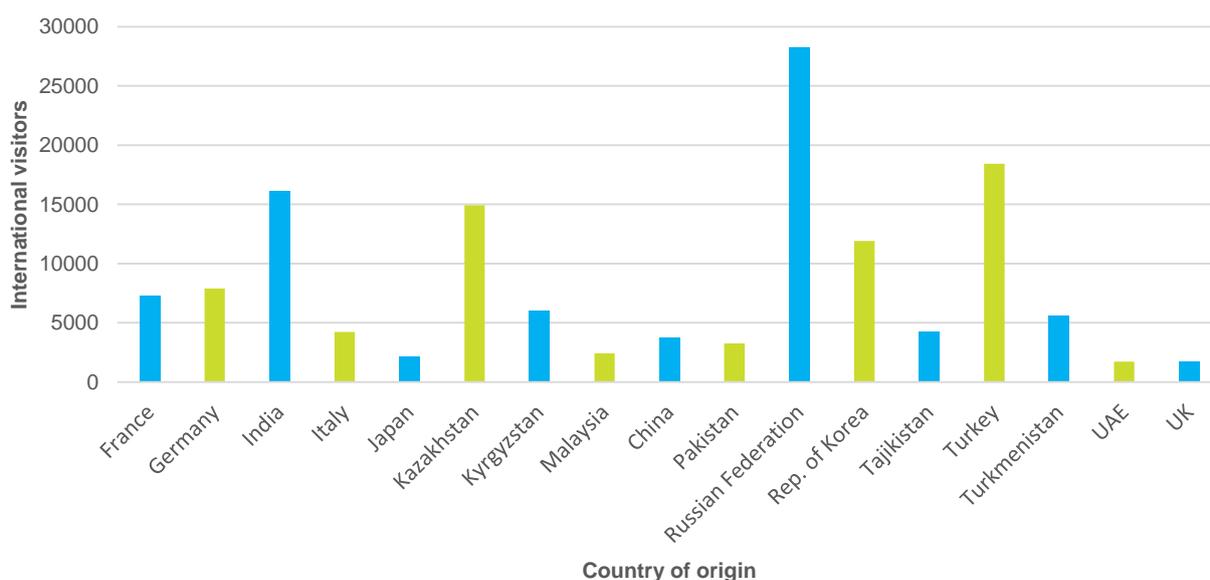
Tourism demand

International visitation to the Republic of Uzbekistan has maintained consistent growth in arrivals over the past five years, increasing from 1.2 million international visitors in 2009 to 2 million in 2013 (Republic of Uzbekistan, 2014; UNWTO, 2014). The majority (91%) of these tourists originated from neighbouring CIS countries and were travelling for the purposes of visiting friends and relatives.

Visitors to the Republic of Uzbekistan for the purpose of tourism accounted for 154,845 international tourists (9%) in 2013, with the Russian Federation representing the largest source market by arrivals with 28,255 tourists recorded. The Republic of Turkey and the Republic of India represented the second and third largest markets with 18,424 and 16,135 visitors recorded. Visitors from Germany (7881) represented the largest source market in Europe whilst visitors from the Republic of Korea (11,908) were the largest market segment originating from the Asia and the Pacific region.

Limited data is available analysing expenditure by country of origin, however it is suggested that markets such as Japan, United States of America, People’s Republic of China, United Kingdom and France may also represent key or emerging source markets of economic importance. Further research is recommended to verify expenditure patterns amongst source markets.

Figure 1: International visitor arrivals for the purpose of tourism to the Republic of Uzbekistan by core market segments, 2013



Data Source: Republic of Uzbekistan, 2014. UNWTO, 2014¹

¹ Data is based on visitors staying overnight for tourism purposes and excludes daytrips.

Demographic analysis

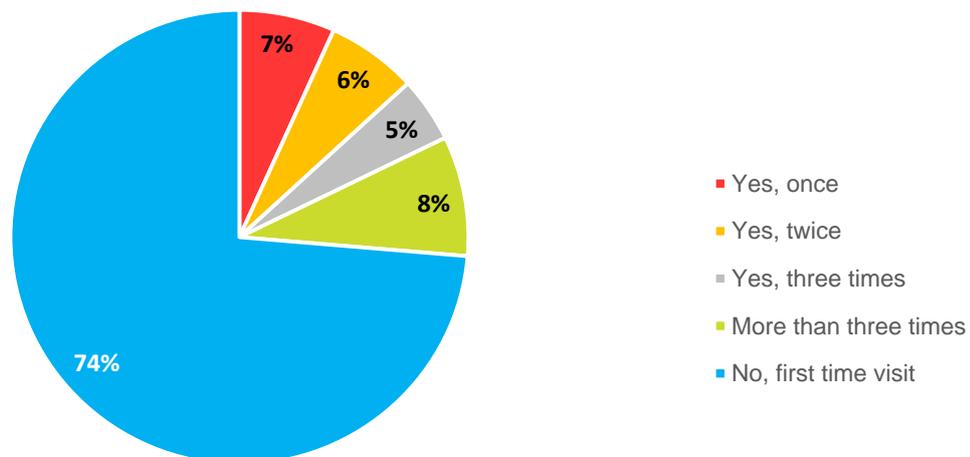
A total of 281 respondents completed the *Uzbekistan Visitor Economy Survey 2014*, with a sample group of 162 males (58%) and 119 females (42%) identified within this research.

The majority of surveys (51%) were conducted in the city of Bukhara with the remaining respondents recorded at the popular tourist destinations of Samarkand (24%), Tashkent (20%) and Khiva (5%). Findings suggest that 91% of all international tourists surveyed decided to visit the Republic of Uzbekistan before departing their home country with 74% of respondents indicating that they were traveling to the country for the first time (refer to figure 2).

The majority of international tourists (63%) surveyed indicated that they were currently part of a tour pre-purchased before arriving in the Republic of Uzbekistan. Data indicated that first time visitors were 31% more likely to undertake a tour as opposed to travelling independently though the country, whilst repeat visitors were on average only 10% more likely to undertake a tour. The results indicated that female respondents had a 13% higher likelihood to purchase a pre-paid tour as opposed to male respondents.

Findings suggest that the majority of surveyed international tourists were highly educated, with 49% of respondents indicating that they had completed a university degree whilst a further 21% had obtained a postgraduate degree such as a Masters or PhD.

Figure 2: Respondents previous visitation to the Republic of Uzbekistan (%)



Data Source: Uzbekistan Visitor Economy Survey 2014

Table 1 highlights how survey respondents arranged to have time to travel to the Republic of Uzbekistan. Findings suggest that the majority of tourists (37%) were on paid holidays from their career jobs whilst respondents who indicated that they were retired (21%) was the second most common response.

Table 1: How respondents arranged to have time to travel to the Republic of Uzbekistan

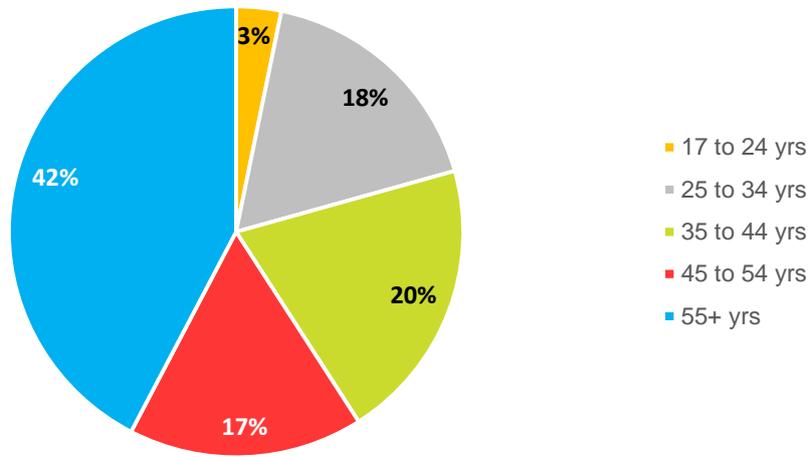
Arrangement	Respondents (%)
I am on paid holidays from my career job.	37%
I am retired.	21%
I quit my career job to travel (took a career break).	10%
I am on extended leave without pay from my career job (took a career break).	7%
I was unemployed at home.	5%
I am travelling for business.	5%
Other e.g. sporting events.	5%
Self-employed.	2%
I just completed my degree at university.	2%
I just quit a temporary job I had to save money after completing university.	2%
I just completed a semester/year of study at university and taking a study break.	1%
I just completed a period of study at high school.	1%
I just quit my temporary job I had to save money to go travelling after high school.	1%

Data Source: Uzbekistan Visitor Economy Survey 2014

Age analysis

Figure 3 summarises the age groups of tourists who participated within this research with respondents aged 55 years and older identified as the largest segment (42%). Tourists aged from 35 to 44 years and 25 to 34 years of age were the second and third largest segments. Data suggests international tourists aged 35 years and over were on average 65% more likely to undertake a pre-purchased tour, as opposed to respondents aged from 17 to 34 years who had a higher preference for independent travel.

Figure 3: Ages of survey respondents (%)

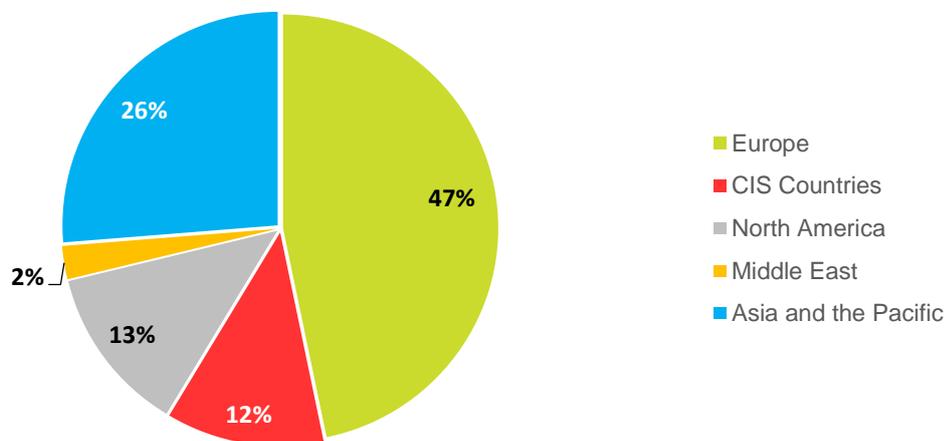


Data Source: Uzbekistan Visitor Economy Survey 2014

Country of origin

Citizens from forty three nationalities were identified in the research, with table 2 (refer to pg.6) providing an overview of the source markets classified within this research. Respondents from Germany (11.7%), France (11%) and Australia (9.3%) represented the top three segments by country of origin, with international visitors from Europe identified as the largest segment (47%) followed by visitors from Asia and the Pacific (26%).

Figure 4: Overview of respondents by region



Data Source: Uzbekistan Visitor Economy Survey 2014

Table 2: Respondents' country of origin

Rank	Country	Total respondents	
		Number	Percentage
1	Germany	33	11.7%
2	France	31	11.0%
3	Australia	26	9.3%
4	United States of America	24	8.5%
5	India	15	5.3%
6	Russian Federation	15	5.3%
7	Japan	14	5.0%
8	Canada	11	3.9%
9	United Kingdom	10	3.6%
10	Spain	8	2.8%
11	Sweden	8	2.8%
12	Kazakhstan	7	2.5%
13	Netherlands	7	2.5%
14	Switzerland	7	2.5%
15	New Zealand	7	2.5%
16	Republic of Korea	6	2.1%
17	Austria	5	1.8%
18	Israel	4	1.4%
19	Belgium	4	1.4%
20	Armenia	3	1.1%
21	Azerbaijan	3	1.1%
22	China	3	1.1%
23	Kyrgyzstan	3	1.1%
24	Georgia	2	0.7%
25	Iran	2	0.7%
26	Turkey	2	0.7%
27	Ukraine	2	0.7%
28	Finland	2	0.7%
29	Italy	2	0.7%
30	Bulgaria	2	0.7%
31	Tajikistan	1	0.4%
32	Turkmenistan	1	0.4%
33	United Arab Emirates	1	0.4%
34	Thailand	1	0.4%
35	Malaysia	1	0.4%
36	Brazil	1	0.4%
37	Denmark	1	0.4%
38	Romania	1	0.4%
39	Croatia	1	0.4%
40	Czech Republic	1	0.4%
41	Indonesia	1	0.4%
42	South Africa	1	0.4%
43	Norway	1	0.4%

Data Source: Uzbekistan Visitor Economy Survey 2014

Travel styles

As evident in table 3, a total of 52% of all respondents preferred to travel as part of a packaged holiday for a set period of time which is purchased before arriving at their chosen destination, whereas in comparison 48% of respondents preferred travelling independently. Findings suggest that the majority of respondents prefer flexibility when travelling within the Republic of Uzbekistan, whether this be as part of a packaged holiday or independently, however many tourists are seeking tourism products and experiences that provide a level of comfortability and familiarity.

Table 3: Overview of respondents' preferred travel style

Style of travel	Respondents (%)
I prefer to go on a complete package holiday for a set period that I purchase before I leave home, with all accommodation and tours pre-booked.	28%
I prefer to go on a package holiday for a set time period that I purchase before I leave home, but I like to have some choice about where to stay and what tours to do.	24%
I like to travel independently, making all travel decisions myself, meeting and interacting with locals as much as possible, using a traveller's guidebook for reference, but preferring to stay in comfortable accommodation.	32%
I like to travel independently, making all travel decisions myself, totally involving myself in local culture, living as locals do, and mostly avoiding other travellers.	17%

Data Source: Uzbekistan Visitor Economy Survey 2014

Travel behaviour

Length of stay

A total of 281 tourists spent over 2800 nights in the Republic of Uzbekistan with an average length of stay measured at 10.2 nights per visit. The highest proportion of tourists, a total of 55%, spent between 1 to 9 nights followed by 43% who spent between 10 to 39 nights in the Republic of Uzbekistan. Less than 2% of respondents indicated that they spent more than 40 days in the country.

Respondents from Europe accounted for 57% of all stays between 10 to 39 nights, followed by visitors from the Asia and the Pacific and CIS countries who represented 25% and 8% of total nights. In comparison, only 37% of European respondents stayed between 1 to 9 nights, followed by tourists from Asia and the Pacific (28%), North America (17%) and CIS countries (14%). This suggests that visitors from Europe prefer to stay longer in the country, whilst visitors from Asia and the Pacific, North America and CIS countries may prefer shorter stays.

Figure 5 highlights that 67% of visitors to the Republic of Uzbekistan were travelling for a total travel period of between 10 to 39 nights, when cross analysed with total nights spent in the Republic of Uzbekistan the data suggests that many respondents were traveling to multiple destinations on the same trip. This can be further verified in table 4 (refer to pg. 9) which indicates 68% of all respondents travelled to another country before arriving in the Republic of Uzbekistan, whilst 58% indicated they would be travelling to another destination once departing the country.

Figure 5: Respondents' length of stay in the Republic of Uzbekistan versus total trip length (%)

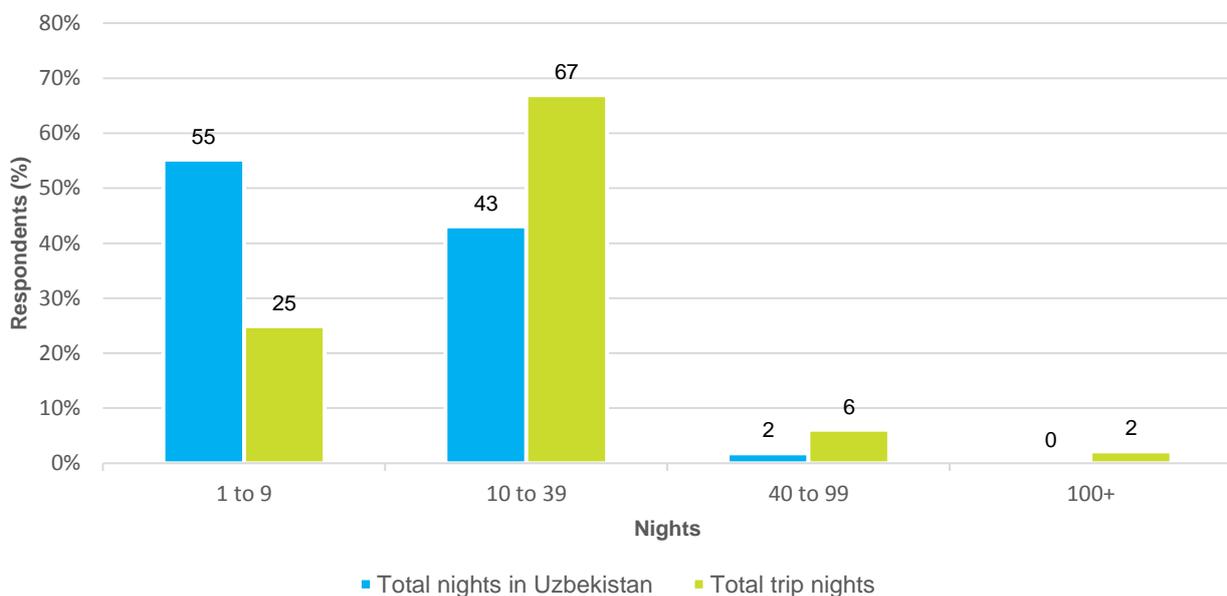


Table 4: Last and next country respondents visited on their current trip to the Republic of Uzbekistan

Rank	Last country	Total respondents	Next country	Total respondents
1	None (flew directly from home)	32%	None (will return home)	42%
2	Kyrgyzstan	15%	Turkmenistan	14%
3	Turkmenistan	12%	Kazakhstan	8%
4	Kazakhstan	9%	China	8%
5	Tajikistan	7%	Tajikistan	6%
6	Russian Federation	7%	India	3%
7	China	5%	Spain	3%
8	Poland	3%	Kyrgyzstan	2%
9	India	3%	Russian Federation	2%
10	United Kingdom	2%	United Arab Emirates	2%

Data Source: Uzbekistan Visitor Economy Survey 2014

Regional dispersal

The capital city of Tashkent, the primary gateway to the country, represented the most visited destination in the Republic of Uzbekistan with 88% of all respondents indicating overnight visitation to the city. This was closely followed by the destinations of Samarkand and Bukhara, which were visited by 86% and 85% of all respondents. Khiva represented 64% of all visitation.

Although Tashkent was the most visited destination in the Republic of Uzbekistan amongst all respondents, the cities of Bukhara and Samarkand recorded a marginally higher visitor night rate with respondents on average staying 2.76 and 2.73 nights in both of these destination. This is compared to 2.57 visitor nights spent in Tashkent.

Figure 6: Regional dispersal versus average nights spent at each destination



Data Source: Uzbekistan Visitor Economy Survey 2014

The data provided in table 5 highlights countries associated with the Silk Road brand where respondents had travelled to either during their current trip away from home or on previous trips. The destinations of the Kyrgyz Republic, Republic of Kazakhstan and People’s Republic of China represented the top three destinations identified, which also coincidentally represented the three destinations recently provided with UNESCO World Heritage listed status for the Silk Road Chang’an-Tianshan heritage corridor. Data suggests respondents who travelled to the Republic of Uzbekistan had a high preference for travel within the Central Asian region.

Table 5: Silk Road countries that respondents have visited

Rank	Silk Road country	Total respondents	
		Number	Percentage
1	Kyrgyzstan	63	22.4%
2	Kazakhstan	60	21.4%
3	China	52	18.5%
4	Turkey	49	17.4%
5	Russian Federation	37	13.2%
6	Turkmenistan	33	11.7%
7	Tajikistan	31	11.0%
8	India	28	10.0%
9	Egypt	21	7.5%
10	Iran	16	5.7%
11	Greece	15	5.3%
12	Japan	15	5.3%
13	Mongolia	13	4.6%
14	Bulgaria	11	3.9%
15	Armenia	10	3.6%
16	Georgia	9	3.2%
17	Ukraine	9	3.2%
18	Croatia	7	2.5%
19	Israel	7	2.5%
20	Saudi Arabia	7	2.5%
21	Republic of Korea	7	2.5%
22	Indonesia	5	1.8%
23	Iraq	5	1.8%
24	Albania	4	1.4%
25	Pakistan	4	1.4%
26	Afghanistan	3	1.1%
27	San Marino	3	1.1%
28	Syria	3	1.1%
29	United Arab Emirates	3	1.1%
30	Bangladesh	2	0.7%
31	Dem Rep of. Korea	1	0.4%

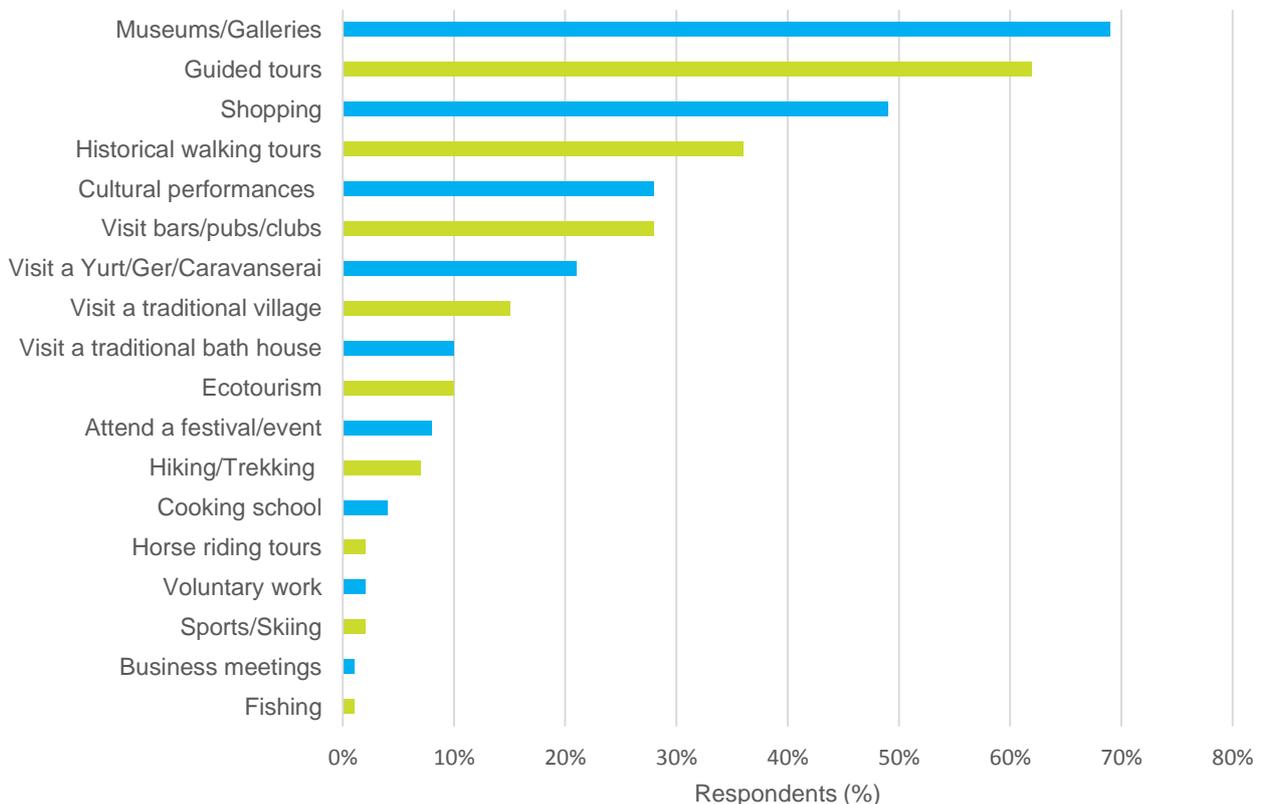
Data Source: Uzbekistan Visitor Economy Survey 2014

Product preferences

Results from the *Uzbekistan International Visitor Economy Survey 2014* provided in figure 7 highlights that respondents were most likely to seek experiences associated with museums and galleries (69%), guided tours (62%) and shopping (49%). A number of age and gender trends were also evident amongst survey responses:

- Tourists aged between 17 to 24 years were on average 14% more likely to participate in ecotourism experiences and attend a festival/event, and 9% more likely to undertake horse riding tours than any other age group. This segment was also on average 35% more likely to visit a bar, pub or club during their travels.
- Respondents aged 55 years and over were 30% more likely to participate in shopping experiences and 40% more likely to undertake guided tours than other age segments.
- Female tourists were 12% more likely to undertake a guided tour, attend a cultural performance and visit a museum whilst in the Republic of Uzbekistan, and 25% more likely to pursue shopping experiences.
- Male tourists indicated they were 11% more likely to visit a bar or club on their travels within the country and 4% more likely to go hiking and trekking.

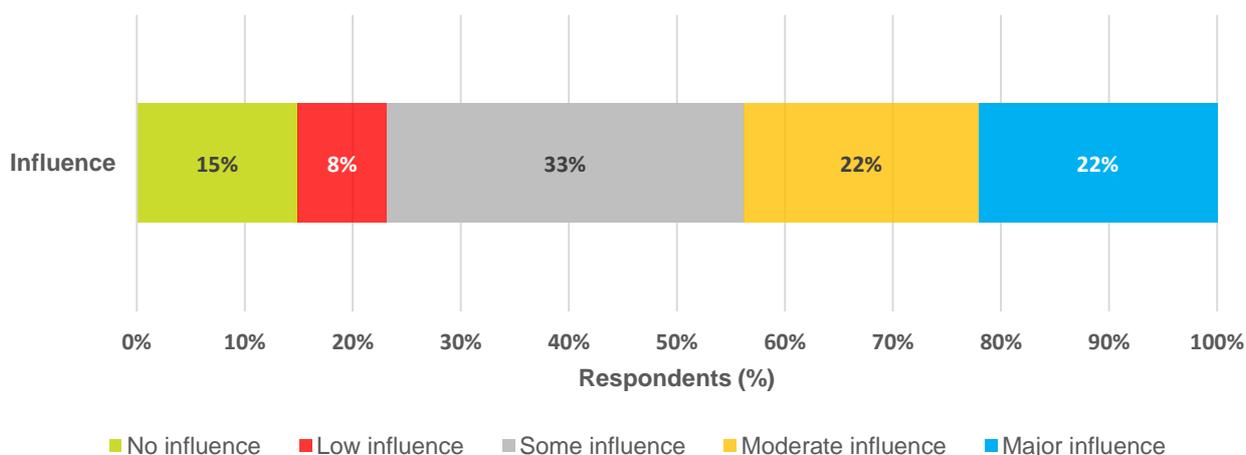
Figure 7: Respondents' product preferences (%)



Data Source: Uzbekistan Visitor Economy Survey 2014

The majority of respondents (44%) indicated that a site holding UNESCO World Heritage status had a moderate to major influence to motivate them to visit that site in the Republic of Uzbekistan, whilst 33% indicated that listing had some influence. A total of 23% of tourists surveyed indicated that UNESCO World Heritage Listing had low to no influence on site visitation. World Heritage status had the strongest influence amongst tourists aged over 55 years and the lowest influence amongst those aged 17 to 24 years.

Figure 8: Level of influence UNESCO World Heritage listing motivates respondents to visit that site (%)



Data Source: Uzbekistan Visitor Economy Survey 2014

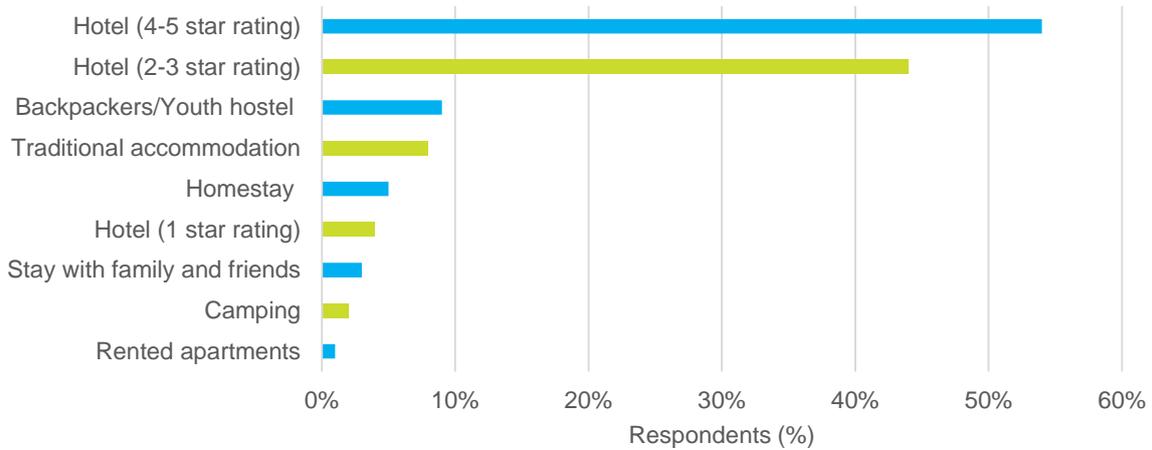
Accommodation preferences

As evident in figure 9, hotels with a 4 to 5 star rating represented the accommodation that the majority of respondents (54%) used or intended to use when travelling in the Republic of Uzbekistan, whilst 2 to 3 star hotels represented the second (44%) most used lodging option. Rented apartments and camping were the least used, with only 1% and 2% of respondents indicating that they had or intended to use these forms of accommodation.

A number of age and gender trends were evident amongst survey responses:

- Tourists aged 17 to 34 years were on average 17% more likely to stay in a backpackers or youth hostel than any other age segment, whilst respondents 17 to 24 years of age were 8% more likely to overnight in a 1 star hotel.
- Respondents 34 to 44 years of age suggested that they were on average 17% more likely to stay in a 4 to 5 star hotel than any other age segment.
- Female respondents suggested that they were 12% more likely to stay in a 2 to 3 star hotel and 4% more likely to overnight in traditional accommodation than male respondents.

Figure 9: Respondents' accommodation usage in the Republic of Uzbekistan (%)

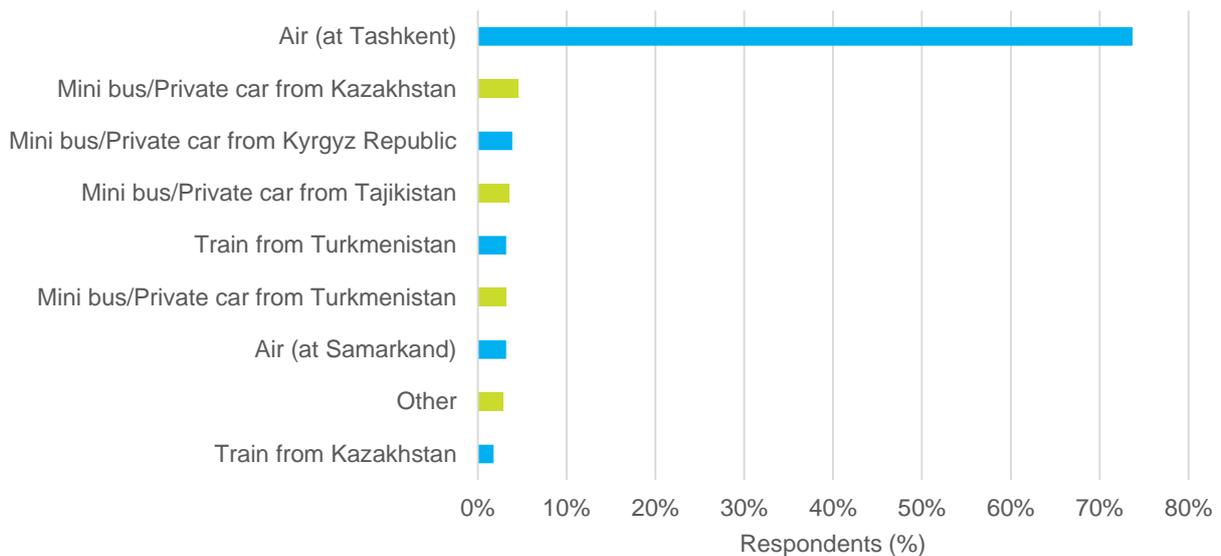


Data Source: Uzbekistan Visitor Economy Survey 2014¹

Transportation preferences

Arriving to Tashkent by air was the most common mode of transport respondents used to enter the Republic of Uzbekistan with 74% of surveyed tourists indicating this. Uzbekistan Airways (56%), Turkish Airlines (14%) and Aeroflot (9%) represented the three most flown international airlines by respondents that arrived by air to the Republic of Uzbekistan (refer to table 6). No significant age or gender trends existed.

Figure 10: Respondents' mode of transport to enter the Republic of Uzbekistan (%)



Data Source: Uzbekistan Visitor Economy Survey 2014

¹ 'Traditional accommodation' refers to properties such as Yurts.

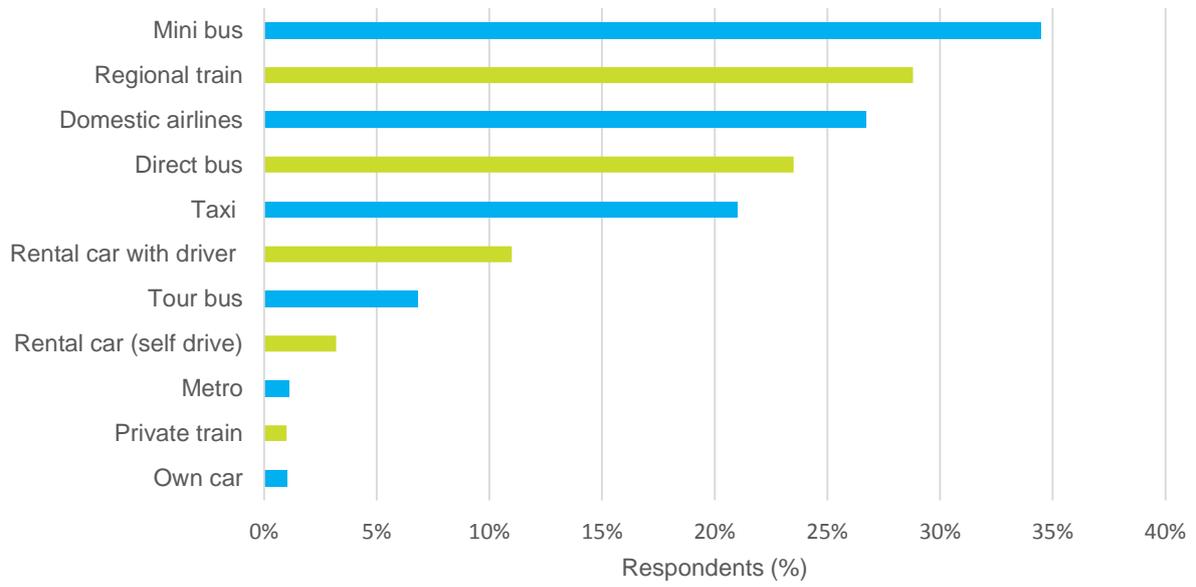
Table 6: Airlines that respondents used to arrive to the Republic of Uzbekistan

Rank	Airline	Total respondents	
		Number	Percentage
1	Uzbekistan Airways	102	56%
2	Turkish Airlines	25	14%
3	Aeroflot	16	9%
4	Air France	7	4%
5	Korean Air	6	3%
6	Czech Airlines	5	3%
7	Air Astana	4	2%
8	Asiana Airlines	3	1%
9	China Southern Airlines	2	1%
10	El Al Israel Airlines	2	1%
11	Scandinavia Air	2	1%
12	Transaero Airlines	2	1%
13	Air India	1	1%
14	Air Kyrgyzstan	1	1%
15	Iran Air	1	1%
16	S7 Airlines	1	1%
17	Tajik Air	1	1%

Data Source: Uzbekistan Visitor Economy Survey 2014

Survey data, as shown in figure 11, suggests that mini buses (35%), regional trains (29%) and domestic air services (27%) were the three most commonly used modes of transport between destinations in the Republic of Uzbekistan. This was followed by direct bus services (24%), taxis (21%) and rental cars with a driver (11%). However the low usage of transportation options provided in the survey amongst respondents who were part of a pre-purchased tour to the Republic of Uzbekistan, may indicate that they travelled via private tour bus or private train for their travels. Further research is needed to verify this.

Figure 11: Types of transport used to travel between destinations in the Republic of Uzbekistan (%)



Data Source: Uzbekistan Visitor Economy Survey 2014

Expenditure

Table 7 highlights average daily expenditure of survey respondents whilst travelling in the Republic of Uzbekistan, which is calculated at USD 325. Accommodation, shopping and tours represent the three highest areas of expenditure. The collected data suggests that male respondents on average spent more per day than female respondents, with an average daily expenditure recorded at USD 371 compared to USD 236 per day for female respondents. Findings suggest that surveyed tourists from CIS countries have the highest average daily expenditure recorded at USD 399, followed by visitors from Asia and the Pacific (USD 354), North America (USD 331) and Europe (USD 278). However it is recommended that as many non-CIS tourists were travelling to the Republic of Uzbekistan as part of an all-inclusive pre-purchased tour, their expenditure may in fact be higher and requires further research to verify.

When examining the average daily expenditure cross analysed with average total trip length, the data suggested an average trip expenditure of USD 3321 per person whilst in the Republic of Uzbekistan. It is important to note that a sample of respondents indicated that they were unable to provide expenditure figures as they were part of all-inclusive packages and as such, the above findings requires further research to identify all-inclusive expenditure.

Table 7: Respondents' average daily expenditure (USD)

Product	Average daily expenditure	Average daily expenditure Asia and the Pacific	Average daily expenditure C.I.S.	Average daily expenditure Europe	Average daily expenditure Middle East	Average daily expenditure North America
Accommodation	99.64	98.63	109.17	97.78	60.00	113.13
Activities and entertainment	32.11	39.00	47.71	22.75	22.50	22.64
Tours	48.15	60.13	49.78	41.62	21.67	52.50
Food and drink	41.06	47.49	43.00	35.44	30.00	47.25
Shopping	68.11	66.57	100.00	53.22	81.00	68.39
Transport	35.39	42.20	50.18	27.66	22.50	27.50
Total	324.45	354.02	399.83	278.47	237.67	331.10

Data Source: Uzbekistan Visitor Economy Survey 2014¹

¹ Excludes international prepaid airfares and packages expenditure. Further research is required to examine tourist expenditure of those participating in pre-purchased tours.

Quality assurance and visitor attitudes

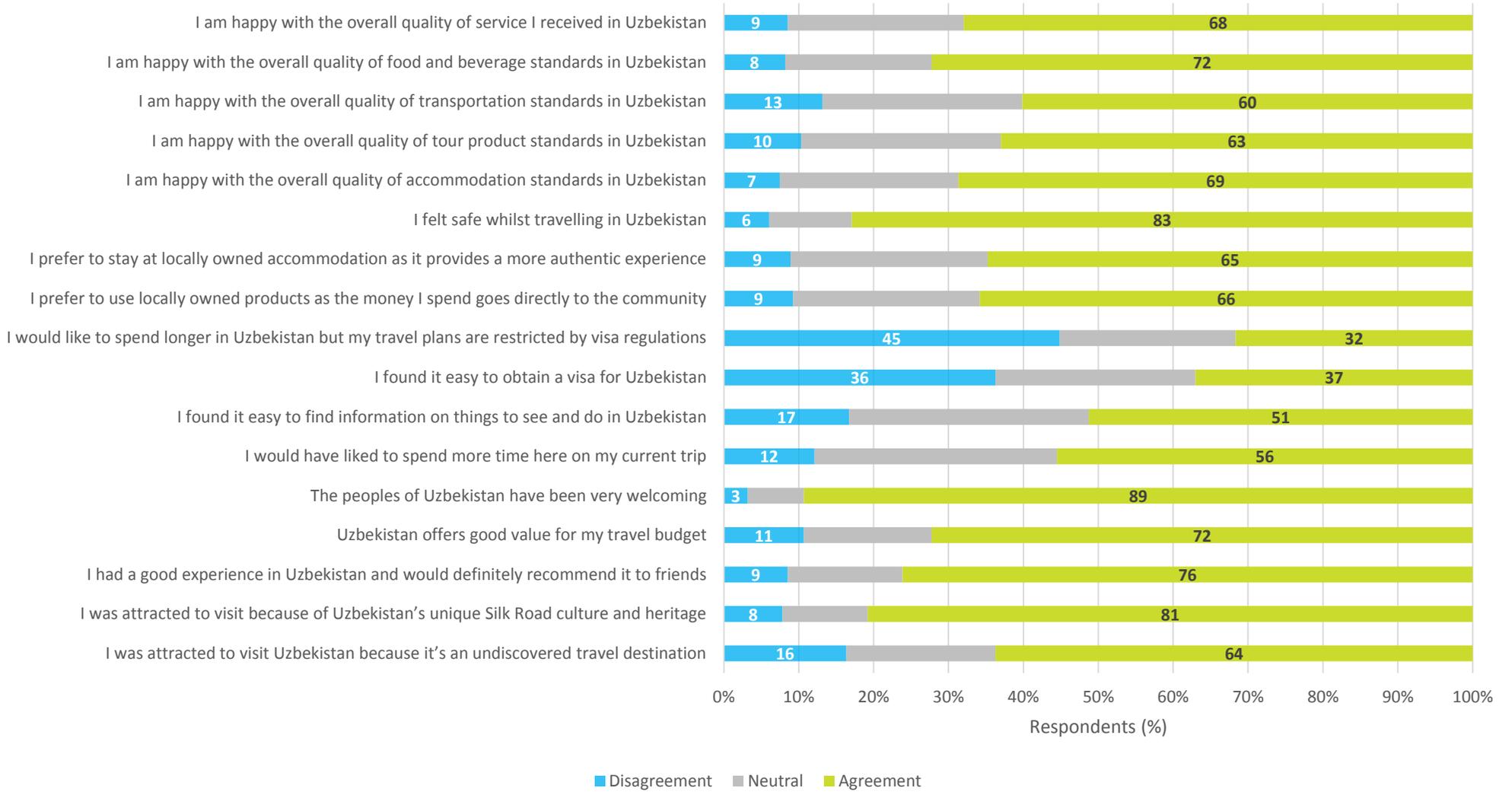
A total of 90 respondents chose to provide additional information at the conclusion of the survey in regards to their opinions, difficulties they came across whilst traveling and any improvements that could be made for travellers in the Republic of Uzbekistan. A complete list of these comments can be found in Appendix 1 (refer to pg.22), however several key themes were evident amongst these responses:

- The need for improved access to personal cash via ATMs and credit card facilities.
- Criticisms regarding complicated visa processes and long application times.
- The need for improved border crossing procedures for tourists.
- The need for improved Internet and Wi-Fi facilities within the Republic of Uzbekistan, especially within accommodation providers.
- Language barriers were an issue for respondents, with many indicating the need for improved translation and interpretation of signage at tourist attractions as well as visitor information.
- The need for improved quality of roads and services, with multiple mentions to street lighting and footpaths.
- Praise for the host community, with the majority of respondents indicating that the Uzbek people were friendly and helpful, and that Uzbekistan was a ‘wonderful’ country to visit.

Figure 12 (refer to pg.18) provides an overview of respondent’s attitudes to a number of elements such as quality, product and brand image of the Republic of Uzbekistan. Overall the results indicated that the majority of tourists held positive attitudes towards travelling in the Republic of Uzbekistan, however data suggests the need for improvements in regards to visa processes and the availability of destination information. The welcoming hospitality of the local population and that respondents felt safe whilst travelling in the Republic of Uzbekistan were the two most agreed with statements.

Silk Road culture and heritage played an important role in drawing visitors to the Republic of Uzbekistan, with 81% of international tourists surveyed indicating that they were attracted to the destination due to its historical connection to the Silk Road. Findings also indicated that the majority of surveyed tourists preferred to stay and use locally owned accommodation and restaurants as it provided a more authentic experience and ensured that the money they spent supported the local community

Figure 12: Respondents' attitudes to the Republic of Uzbekistan (%)



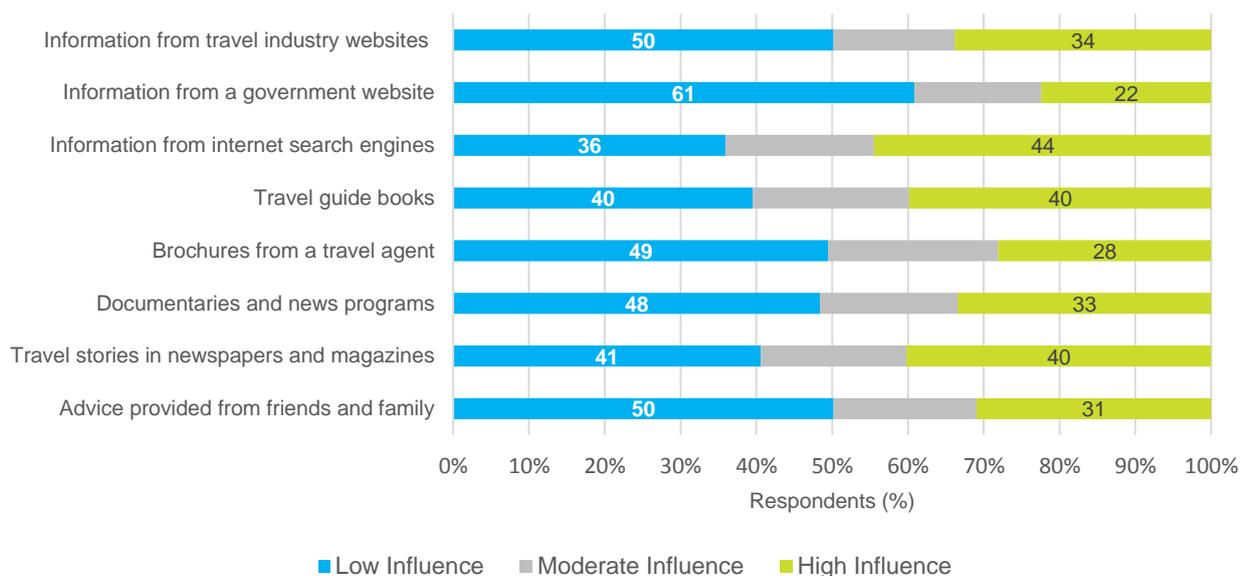
Travel planning and communication

Information sources

The Internet (refer to figure 13) represented the most influential source of information that respondents consulted when planning their travels to the Republic of Uzbekistan, with 44% of surveyed tourists indicating this. Guidebooks such as Lonely Planet and travel stories in newspapers and magazines collectively represented the second (40%) most influential sources of information for tourists. Information from government websites and advice from family and friends represented the least influential, with 61% and 50% of respondents indicating a low level of use. Findings indicated a number of trends amongst age segments:

- Advice from family and friends, and information from industry and government websites was most influential amongst respondents aged 34 to 44 years.
- Travel stories in newspapers and magazines, and travel guidebooks were most influential amongst respondents aged 45 to 54 years.
- Television documentaries and news programs were most influential amongst respondents aged 25 to 34 years.
- Travel brochures were most influential with those respondents aged 55 years and over.
- Information gained from the Internet was most influential amongst tourists aged 17 to 34 years.

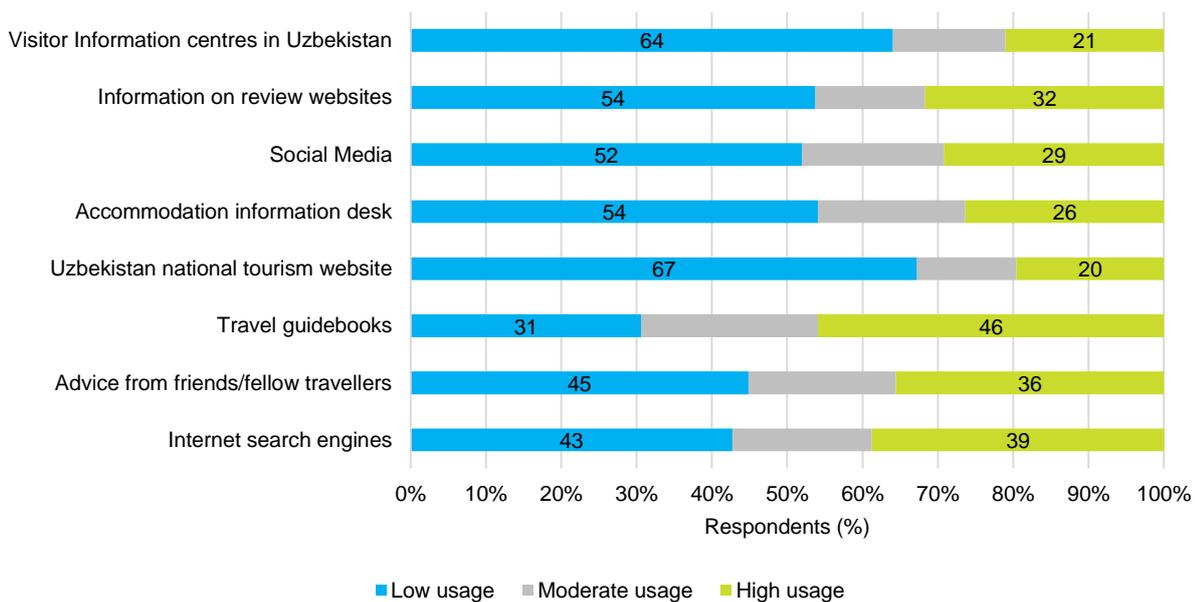
Figure 13: Influence of information sources when deciding to visit the Republic of Uzbekistan (%)



Data Source: Uzbekistan Visitor Economy Survey 2014

Travel guidebooks such as Lonely Planet (refer to figure 14) was the most consulted information source amongst respondents whilst travelling in the Republic of Uzbekistan, with 69% of tourists indicating a moderate to high rate of use. This is followed by Internet search engines (58%) and advice provided from friends and fellow travellers (56%). The least used information sources were the Republic of Uzbekistan’s National Tourism Website and local Visitor Information Centers with 67% and 64% of respondents indicating a low usage of both these resources.

Figure 14: Usage of information sources whilst travelling in the Republic of Uzbekistan (%)



Data Source: Uzbekistan Visitor Economy Survey 2014

Digital activities

Emailing friends and family represented the digital activity most used by respondents (41%) whilst travelling in the Republic of Uzbekistan. Accessing the Internet via a mobile/smart phone, communicating with friends via instant messenger platforms and updating trip photos on social networks were the second (28%), third (27%) and fourth (26%) most used activities. A number of age and gender trends were evident amongst survey responses:

- Findings indicated an extensive and high usage of digital technologies whilst travelling in the Republic of Uzbekistan amongst respondents aged 17 to 44 years, with an average of 67% of this age segment engaging in digital activities.
- Respondents aged 45 years and over were on average 4% more likely to read the newspaper (digitally) from home at least once a week whilst travelling.

- Female respondents were 10% more likely to email photos of their trip to friends at home whilst travelling and 11% more likely to communicate with friends via instant messenger than male respondents.

Table 8: Digital activities used whilst travelling in the Republic of Uzbekistan

Information Technology activities	Respondent usage	
	Number	Percentage
Emailing friends and family on a regular basis.	114	41%
Accessed the Internet via as Mobile or Smart Phone device.	79	28%
Communication with friends via instant messaging (e.g. WhatsApp).	75	27%
Updating trip photos on social networking sites (e.g. Facebook).	74	26%
Communicating with friends at home on VOIP (e.g. Skype, FaceTime).	74	26%
Sending an SMS to friends at home.	73	26%
Emailing photos on my trip to friends at home.	53	19%
Writing a blog about my trip.	35	12%
Read the newspaper online from home at least once a week.	35	12%
Used an Internet café.	31	11%
Reviewed accommodation online.	30	11%
Contributed to online forums (e.g. TripAdvisor and Lonely Planet).	29	10%
Using calling cards or vouchers to call home.	14	5%
Uploaded a travel video on the web (YouTube).	14	5%

Data Source: Uzbekistan Visitor Economy Survey 2014

Appendix 1 – Respondent comments and suggestions

Please note that in many cases the following comments have been provided by respondents who spoke English as a second language.

Survey respondent comments
Access to cash via ATMs would be good. The visa process was difficult and would deter me from returning.
Bathroom facilities between Khiva and Bukhara in poor condition. Drivers too fast and dangerous on phone.
Better quality coffee and improved Wi-Fi access.
Better streets and sidewalks. More light on streets. Better toilets for Visitors. Menu in Italian at Restaurants.
Border crossings were complicated and repetitive. Lack of English translated services.
Complicated Visa process.
Customs process is crazy, annoying and unnerving. Hard to get money as no ATMs or no cards accepted. Need improved roads.
Difficult ATM access.
Easier visa process. Stronger Internet connections especially at hotel. Improved acceptance of credit cards.
Electricity Problems.
Far too many souvenir shops in historical monuments. The food lacks flavour considering it called Silk and Spice Road. People are lovely. Internet is dreadful. Visa process too long at 4 weeks.
Food and peoples excellent.
Grateful to travel to Uzbekistan and made many friends. Need for improved tour product comfort.
Hard to get money.
Having to cross borders on foot. Limited English skills.
Hygienic options for food, accommodation hard to find sometimes. Local people friendly. Some hotel standards fall short of their advertised level e.g. hot water, Wi-Fi.
Hygiene issues.
I enjoy my trip very much. Conditions of roads, pavement and lighting bad. Adjustable heaters in Hotels.
I really enjoyed the county. Local people are friendly and helpful. Uzbekistan could make more foreign exchange from credit card facilities and access to ATM
Improve quality of service and transportation.
Improve road conditions.
Improve services of transportation.
Improve amenities in old city.
Improve connections to India. Improve visa processes.
Improve queue systems to purchase tickets.
Improve roads.
Improve roads and visa/arrival process in Tashkent
Improve service standards.
Improve taxi customer service.
Improve toilets in regional area - need western type.
Improve tourism brochures and website. Easier visa acquisition would help.
Improve Wi-Fi.
Improve Wi-Fi access. Better coffee. Simpler visa process.
Improvements to travel regulations. Internet Speed improved. More tourist information centres.
Incredible Friendly People, excellent hotel conditions 4 star and amazing trip.

Survey respondent comments

Information in travel guide not accurate. Improved English signs at museum. Ensure authentic experience.

Internet access very poor even in 5 star hotels. Visa is nuisance, could be issued at border.

Language barriers.

Limited tourist information on opera and dance. Expensive to visit all sites in Bukhara, one multisite ticket would be good.

Long customs time and crowded.

Loved the country. More access to cash and currency facilities would be good. Also credit card facilities, we would have bought more, especially carpet.

More fast trains around country.

More lighting on the streets by night. Better sidewalks.

More maps of tours and cities and easier availability of maps.

Need brochures and city maps. Not much choice of restaurants, cafes and bars.

Need improved road conditions.

Need improved passport and border crossing procedures - long queues and process of checking bags multiple times. Wonderful country!

Need improved roads and lighting.

Need information centres. Sightseeing places far from local city.

Nice people. Improve public transport options.

Not high speed Internet and not many information centres.

Our Guide has been excellent. We like to travel independently but felt that Uzbekistan would be too difficult alone so that is why we joined a tour.

People are friendly. I like the food but can't digest it well. More personal care products to buy. More authentic wares as opposed to tourism tat. Experience authentic experiences not tourist destination

People in Uzbekistan are very Kind!!! I'm enjoying my travels.

Please abandon registration slips. Improve service at railway ticket counters.

Poor quality intercity roads and local roads. Need improved footpaths.

Poor Roads. Airport customer procedures is disorganised.

Problem to get registration stamp.

Procedure at airport not efficient. No information in English. No English speaking staff.

Reduce price to enter mosques and museums. Improved range of food choices and better quality.

Road conditions are bad. Visa costs and restrictions.

Road conditions are terrible.

Road issues and issues at Tashkent International Airport.

Road systems should be improved.

Roads need to be improved.

Shared taxis are stressful. Standardised rates would really help travellers feel comfortable.

Simplify visa application.

Speed of Internet should be improved.

Tashkent Airport was horrible and took too much time. Everything else was good

The restaurants are more expensive. Transport system should be increased. I liked the seasons of Uzbekistan.

There are not many information centres in Uzbekistan.

Tourist Information Centres are very few.

Transport service should be improved.

Transport very bad. Historical places have no explanation in different languages. No tourist guide at airport. No tourist map. No signage on street.

Uzbekistan a beautiful country. Travel Agencies work very bad.

Survey respondent comments

Uzbekistan is a wonderful country!

Visa cost and restrictions an issue.

Visa Free Travel for Europe. Improved quality of restaurants and Hotels. Improved Roads. Improved border crossing.

Visa procedure complicated.

Visa problems - should apply online. Barriers in customs.

Visa Processes. Improvements to Food to meet tourists.

Visa procedures and expensive.

Visa Requirements is complicated. Improved standards for Uzbekistan Airlines. Camera fees are annoying. Taking of passports at Hotel not tourist friendly.

Wonderful country - problem with Internet.

Wonderful country. Happy to be here and will recommend to all my friends.

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