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IMPACT OF COVID-19 ON THE TOURISM INDUSTRY OF ARAL SEA REGION OF UZBEKISTAN

Olimjon Saidmamatov

PhD student, Faculty of Economics, Urgench State University, Uzbekistan.

saidolimjon@gmail.com

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ABSTRACT

Tourism as an emerging sector in Aral Sea region of Uzbekistan has been facing consistent reforms since 2016 aiming to diversify business opportunities. But, the unexpected COVID-19 pandemic disturbed the plans. The study evaluates the current situation of tourism throughout the pandemic and discloses the priority needs of tourism entities to survive during the crises. A structured questionnaire consisting of 15 questions was developed to study the perspectives of tourism business units during the pandemic. 279 respondents were found eligible for analysis based on the structured questionnaire that was collected from tourism stakeholders. Survey results revealed that revenues witnessed a significant decline during the pandemic and stakeholders are expecting short-term financing instruments provided by the government. The role of the government in assisting tourism bodies to rehabilitate after the pandemic is dramatic. Another finding is that there is a necessity for building strong cooperation between authorities and tourism establishments to fight adverse consequences more effectively.

Keywords tourism, COVID-19, Uzbekistan, state support

Introduction

Tourism industry reached its eight growth in a row in 2019 and the number of worldwide tourists estimated at 1,5 billion (UNWTO, 2020). It is believed to increase further in future years but the “COVID-19” pandemic changed the situation dramatically and now this field is said to have been affected worse than other sectors. The global spread of the coronavirus pandemic has had a profound negative impact on the sustainable development of tourism, as well as all sectors of the economy. According to the second report of UNWTO dated from April 28, 100% of worldwide destinations have had pandemic related travel restrictions. Statistical data reveal the number of foreign tourists in the world in January-August 2020 reduced by 700 million compared to the same period in 2019. The loss from the export of tourist services amounted to USD 730 billion. Damage caused by the pandemic on the tourism industry of the world is 8 times more than the damage caused by the global financial and economic crisis in 2009 (UNWTO, 2020).

Globally, many emerging economies rely largely on tourist spending which accounts for a significant contribution to the gross domestic product (GDP) of those countries (Azam et al, 2018). Since its situation at the crossroads of the Silk Road Route through the centuries Uzbekistan possesses boundless potential in terms of tourism development and the greatest

and well known trade route in history, which connected Europe and Asia. Uzbek tourism market has been often disregarded by global tourism while having a wide variety of medieval historical and cultural heritage as well as great natural beauties (Horak, 2014). Furthermore, the country has long been associated with vast arable land and remains one of the most underserved tourist destinations in the world (WEF, 2015).

Notably, Uzbekistan is doing rapid reforms in the tourism sector by cancelling visa requirements, establishing direct flights with major European cities. Export earnings generated by tourism in Uzbekistan have grown to USD 1,7 trillion which makes the sector a truly global force for economic growth and development, driving the creation of more and better jobs and serving as a catalyst for innovation and entrepreneurship (UNWTO, 2019).

The research question is to study the impact of COVID-19 on the tourism industry of Aral Sea region of Uzbekistan from the supply side. The research methodology includes the survey evaluating perspectives of local tourism business units on the impact of COVID-19 pandemic. The research hypothesis is that tourism business units (as hardest hit by COVID-19) do seek support from the government. Apart from this, the work attempts to analyze current relief measures established by authorities and whether taken actions satisfy expectations and needs of tourism business units.

Literature review

Global situation

As it is known, natural disasters and other catastrophes can interrupt the working, performance and even existence of an establishment (Caponigro, 2000). It was stated that humans and their activities (including tourism) will be modified by several factors in the 21st century (Dahal 2020). In this point, Jamal et al. (2020) considers that two most significant reasons for the change in the tourism industry will be climate change and health emergencies.

In December 2019, China reported an outbreak of a form of pneumonia with unknown causes which became a public health emergency of international concern (Foo et al, 2020). The COVID-19 pandemic bankrupted many hospitality-related industries, such as hotels, restaurants and countries closed their borders respectfully (Luo et al, 2020; Bresciani et al, 2021). Since the outbreak of COVID-19 the world tourism industry has decreased more than 80% (UNWTO 2020; OECD, 2020).

Studies (Chinazzi et al, 2019; Lean et al, 2009; Pavli et al, 2014; Baker 2015; Farzanegan et al, 2020; Fang et al, 2020; Page et al, 2012) affirm that visitors to/from disease-affected regions are the main causes of the spread of illnesses, including the COVID-19, globally. International and domestic restrictions, set by governments as a precautionary measure from the COVID-19 have no doubt rigorously affected the economies of nations around the world, influencing the tourism and hospitality industry the most in all parts of the value chain. These movement restrictions imposed by governments of different regions have cost the tourism industry a significant loss of USD 200 billion at international level (Ozili et al, 2020). Following the pandemic, within the timespan of months, the global tourism shortens from over tourism to no tourism, once the streets full of tourists are now empty (Conde Nast Traveller, 2020).

The COVID-19 caused many changes in the tourism industry, particularly in tourist's behaviour as tourists are likely going to look for quality and safety in facilities and services. It

was concluded that stakeholders of the tourism industry should be ready to make facilities and services adapt them (Pinos et al, 2020; Ulak 2020). Because suggestions and ideas of tourists are crucial tools to make required changes in the activities of tourism service providers and improve the competitiveness of tourist destinations (Bekjanov 2020; Bekjanov et al, 2020). On its turn, the impact of COVID-19 on three major stakeholders (tourism demand, tourism operators, destinations and policy makers) was explored in 3 stages: before, during and after the pandemic (Sigala, 2020). In addition, the impact of the COVID-19 pandemic on tourists' intentions and behaviours were analyzed considering socio-demographic and psychological characteristics that might influence their intention to take a vacation in a post-pandemic period (Peluso, 2021).

Meanwhile, Pinos et al (2020) stated that many business travellers prefer to fly less. Importantly, even high-level talks, such as the meeting of G20 Leaders on 26 March 2020, have for the first time been organized through videoconference (European Council, 2020). As per Gossling et al (2021), it is recommended that the COVID-19 crisis should be considered as a chance to think again about tourism's growth trajectory and it is important to cooperatively learn from this pandemic to hasten the transformation of sustainable tourism. Several studies by Gossling et al (2021); Hall (2020); McCartney et al (2021) recommend that their growth models and assumptions caused the current situation that enables us to reimagine and reset tourism. Sigala (2020), McCartney et al (2021) considers that technologies are at the core of solutions to recovery tourism and economy from the COVID-19.

Local situation.

Before COVID-19 the tourism industry was one of the leading sectors of Asian countries and the consequences of the pandemic caused to wipe out many firms especially small and medium-sized enterprises (Helble, 2020). In Uzbekistan, more than 1,500 tour operators and 1,200 hotels (Matyakubov, 2017; Matyakubov et al, 2018) ceased their operations temporarily because of the pandemic which significantly impacted on their incomes (Norchaev 2020). The development of domestic tourism is considered as a priority to revive the tourism industry during COVID-19 (Kim 2020). The impact of COVID-19 on the tourism industry of Uzbekistan has been studied and optimistic, pessimistic and real scenarios have been forecasted to rehabilitate the industry (Ivanov, 2020; Bekjanov, 2020). In this situation, the role of the government (Saidmamatov et al, 2020) is vital to keep tourism business (Matyakubov et al, 2020; Saidmamatov et al, 2020).

Studies conducted regarding the impact of COVID-19 on the tourism industry in the case of Uzbekistan is quite limited. It is possible to find a range of works done to analyze the consequences of the pandemic for the tourism sector outside Uzbekistan. In order to relieve the adverse effects of COVID-19 on the tourism industry, the Malaysian government established an economic stimulus package to boost its tourism industry, stakeholders engaged in tourism activities received help from the government in the form of tax reductions, subsidies, rescheduling of repayments to banks (Foo et al, 2020; Neuburger et al, 2020). In the case of Egypt, the government earmarked 50 billion Egyptian pounds to keep hotels running. Rent payments are postponed and a cash transfer programme is established to aid families involved in tourism activities (Scoop, 2020).

There have been several attempts to study the impact of COVID-19 on the tourism industry of Uzbekistan (Kurpayanidi et al, 2020; Matyakubov et al, 2020). Those works mainly highlighted economic consequences of COVID-19 and also provided scenarios for the future of the tourism industry in Uzbekistan. Apart from that the Uzbek government has taken the necessary measures to reduce the risk of coronavirus, using world experience. Saving lives requires tough quarantine measures. Quarantine measures severely limit economic activity. The limitation of economic activity leads to a significant reduction in income and a decrease in the standard of living of the population. The consequence of this is a decrease in demand for products of economic sectors, and since a similar situation is observed in almost all countries of the world, the opportunities for exporting domestic products are also declining (Kurpayanidi et al, 2020).

In Uzbekistan, however, among other countries, there was no institutional basis for urgent and prompt resolution of such complex problems as the current outbreak of coronavirus infection, the necessity for strict quarantine of the population while supporting economic affairs in the country. There were no predetermined sources of funding for such large-scale events (Kurpayanidi et al, 2020).

What is missing is knowledge about how hard tourism businesses were hit by COVID-19 from stakeholders perspective and what kind of assistance they seek from the Uzbek government in order to mitigate adverse effects of COVID-19. In order to fulfill these gaps, this paper aims to study the impact of COVID-19 on the tourism industry of Uzbekistan from a supply-side perspective. In addition, this study sheds light on the type of assistance that stakeholders expect from the government.

Methodology

Questionnaire development

The questionnaire used for this survey (Ivanov, 2020) was splitted up into four categories: (1) identifying the business expectations of tourism stakeholders before pandemic, (2) learning current activities of tourism service providers, level of engagement in tourism sector during pandemic, (3) estimating the economic impact of pandemic to the revenue, bookings and labor force of tourism entities, (4) comparing the business needs of tourism during pandemic with the offered government support to alleviate negative economic consequences of COVID-19.

Data collection and sample characteristics

Primary data was collected using a structured questionnaire that consists of 15 questions (Appendix 1). The survey was conducted in the period from December 2020 - January 2021, through an online questionnaire, which was distributed via the official social networks (i.e., Telegram, WhatsApp) of the tourism stakeholders in Uzbekistan, such as Uzbek Tourism State Committee and its departments in 12 regions. The respondents were notified that involvement in the survey was anonymous and voluntary, and that the results would be utilized exclusively for scientific study purposes. The research target is the tourism stakeholders (i.e., tour agents, hotels, guides, museums, NGOs) who are currently running different businesses related to the tourism sector (i.e., commerce, agriculture) and 279 responses have been collected.

Data analysis

Descriptive statistics were used in the analysis of data. Descriptive statistics demonstrated classification of respondents and a five point Likert scale was developed to analyze current impact of COVID-19 on tourism and future expectations. Data analysis was conducted by using the SPSS 24 program.

Analysis and Results

Survey results

Hotel (28,6%), tour guides (26,8%) and travel agents (25,7%) are the most active respondent categories in the survey while males constitute 61,3% and females 38,8% among respondents. 66,4% of the respondents noted that their business was growing while the remaining had a stable condition before pandemic. After the pandemic, 61,8% of tourism entities stopped the business temporarily while 30,2% units still offered hospitality services. During the pandemic, tourism service providers temporarily switched to trade (34,9%), education (27,5%) and agriculture (36,5%) industries (Table 1).

Survey results revealed that in 2020 the level of impact caused by COVID-19 was significantly high in revenues (60,1%). Revenues generated by tourism activities severely affected by COVID-19 and only a minority of respondents (3,2%) indicated that their revenues did not suffer from COVID-19. According to 54,5% of respondents bookings (tour packages) witnessed dramatic decline between 50-100% as well. 42,3% of stakeholders specified that the labour force was also badly affected by the pandemic indicating that the level of impact was between 50-100%. Relatively small portion of respondents indicated that their businesses were not affected by COVID-19 (Table 2).

As for expectations for 2021, stakeholders expressed their sceptical attitude towards future activities in the tourism industry. Indicators suggested that the level of decline in the revenues might vary between 25-50%. Relatively, a high proportion of respondents are concerned about the impact of COVID-19 on their labour and bookings as well. 88 respondents expressed possible reduction in bookings between 25-50% in 2021. One-third of the respondents forecasted that the labor force would decrease up to 25% in 2021. Business units (56%) who received government support had better expectations for 2021 in terms of revenue and bookings compared to those who did not receive state support (44%).

Stakeholders expressed interest and counted access to cash and short-term financial support as a first priority assistance they would like to receive from the government. The least interest was expressed regarding legal advice on application of labour regulations during the crisis period. In addition, deferring payments of utilities, social security contributions, loans or taxes were accounted as one of the main actions that should be done in first priority. There was not very big contrast in supplies of personal protection equipment (masks, thermometers) and legal advice on application of labour regulations during the pandemic.

State support during pandemic in Uzbekistan.

The coronavirus (COVID-19) pandemic is, first and foremost, a humanitarian crisis affecting people's lives, and has triggered a global economic crisis. This has very tangible impacts for the tourism sector, which is critical for many people, places and businesses, with the impact particularly felt in countries, cities and regions where tourism is an important part

of the economy. COVID-19 crisis disrupted lives and livelihoods worldwide and has limited travel within and across borders. It has badly influenced the tourism industry, including ecotourism. Ensuring the survival of ecotourism is crucial as it will help the tourism industry recover from the effects of COVID-19 with its outdoor nature.

Like other countries, the coronavirus pandemic affected Uzbekistan's tourism destinations very badly. In March 2020 the first case with COVID-19 was recorded in the country and the government had to establish some kind of restrictions related to pandemic. By comparing it can be seen that during January and February before pandemic there was an increase in the both numbers of foreign tourist numbers in 2019 in January 437,3 thousand foreign tourists visited the country while 538,4 thousand in 2020 year in February it was estimated 393,5-440,2 thousand. But in March it declined dramatically because of COVID-19 and only 235,4 thousand international visits were recorded and it was 549,5 thousand in March, 2019 (UzbekTourism, 2020). In the period April-June, the figure was around 2,100. At the same time, the number of Uzbek citizens who left the country for tourism purposes in January-March 2020 was approximately 1,4 million and this figure plunged to 3,500 in April-June (Lex.uz, 2020a). The number of foreign citizens who visited Uzbekistan as tourists in January-June of this year was 1,216,000 (Lex.uz, 2020b), which, compared to the same period of 2019, has decreased by 60 percent (Lex.uz, 2020c).

In this hard situation, tourism entities are not working properly. Considering the current circumstances, they need support from the government to maintain their businesses and the state created a set of subsidies from the State Fund for Entrepreneurship. The program also focuses on incoming tourists by guaranteeing safe travel and providing compensation if the tourist become COVID-19 infected within Uzbekistan.

The Decree of the President No. PD-6002 on May 28, 2020 "On urgent measures to support tourism to reduce the negative impact of the coronavirus pandemic" and the Resolution No 4755 "Additional measures to the development of the tourism sector in following the requirements of the strengthened sanitary-epidemiological security regime" was accepted on June 19, 2020 to accelerate the recovery of tourism after the stabilization of the sanitary-epidemiological situation.

Conclusion, Limitations and Future Research

The conducted research focused on the impact of COVID-19 pandemic on the tourism industry of Aral Sea region of Uzbekistan from the supply side. Government plays a dramatic role in the battle against COVID-19 on many levels, such as the recovery of the economy which includes the tourism sector. Survey results assisted to generate vision of local stakeholders on the economic consequences of COVID-19 to their business as well as expectations from government as a relief measures. This study revealed that it is essential to build working relationships between authorities and tourism entities in order to mitigate adverse effects of COVID-19 in a more effective way and it also provides a clear vision for the government and tourism stakeholders how to cope with the problem instead of observing it. In this context, government support in providing short-term financing assets to tourism entities is considered as an essential measure. Tourism business units consider that the Government needs to defer the payments (i.e., taxes, utilities, social security contributions) until the end of the pandemic.

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Table 1. Classification of survey respondents, n=279

	Hotel	Museum	NGO & public authorities	Restaurant & cafe	Travel agent	Tour guide
Number of respondents	79	10	13	32	71	74
Number of employees						
self-employed	-	-	-	-	-	34
below 10	35	4	3	15	55	30
11-50	32	4	4	13	16	10
51-100	10	2	3	3	-	-
over 100	2	-	3	1	-	-

Source: Authors development

Table 2. Impact of COVID-19 in 2020 and expectations for 2021 (n = 279)

	2020			2021		
	Revenues	Bookings (tour packages)	Labour	Revenues	Bookings (tour packages)	Labour
None	9	11	16	42	44	62
to - 25%	25	35	48	92	98	92
- 25% to -50%	74	79	91	85	88	65
- 50% to -100%	169	152	118	53	44	42
don't know (6)	2	2	6	7	5	18
Mean	56,6	53,2	46,1	28,9	28,0	24,1
SD	1,49	1,62	1,96	2,43	2,47	2,69

Source: Authors development