

Tourism in

Tajikistan

as Seen by Tour Operators

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Palace of Nations, Dushanbe

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Fedchenko Glacier, GBAO (Surat Toimasov)

INTRODUCTION

A World Bank Group (WBG) team from the Finance, Competitiveness, and Innovation Global Practice rolled out a survey to obtain information on the experiences of visitors to Tajikistan. Data on tourism in Tajikistan are scarce: quantitative information is limited to mostly aggregate arrival data, while qualitative information is almost absent. To address this limitation, as part of the preparation of the Rural Economy Development Project (REDP), the WBG team rolled out a small-scale, independent survey. The objective of the survey was to complement quantitative data about tourism arrivals and spending and to collect information that could inform the design of REDP interventions.

A survey of tour operators was conducted to collect data about target groups of tourists in Tajikistan. In the absence of more granular sources of information, such as a tourism satisfaction survey, the team developed and implemented a survey of tour operators, who could provide first-hand quantitative information and indirectly reflect the opinions of their customers. The survey therefore focuses on the experience of tourists who visit Tajikistan with tour operators. The average numbers reported in the survey are weighted by the number of tourists the operators bring to Tajikistan to better reflect the views of tourists.

The survey was sent to incumbent tour operators who were already organizing tours in Tajikistan (to better understand their customers' experiences), and to operators who did not yet offer Tajikistan as a product (to analyze potential latent demand). An online questionnaire comprising 58 questions was circulated among local and foreign tour operators, between August and September 2018. Follow-up interviews were organized with some respondents to verify data and clarify qualitative answers. Of the questions, 47 were for tour operators who have organized Tajikistan tours in the past five years. These questions focused on their customer profile, volume of tourists, pricing strategies, and a qualitative assessment of various tourism offerings.

Tour operators not offering Tajikistan itineraries were asked separate questions to assess constraints and potential demand.

The survey covered Tajikistan as a whole, but gave particular focus to the two regions targeted by the REDP: Khatlon and Gorno Badakhshan Autonomous Oblast (GBAO). Khatlon is a mainly agricultural area that is rich in historical and cultural assets. GBAO is a remote region that is already a popular destination for foreign tourists in Tajikistan.

The survey was completed by a total of 45 operators. Respondents included 31 operators (21 domestic and 10 international) who offered tours in Tajikistan (referred throughout this report as 'incumbent operators') and 14 operators who did not offer tours in Tajikistan. Of those respondents who did not offer tours in Tajikistan, nine indicated that they would be interested in doing so if certain improvements were made ('potential operators') and five were not interested in launching tours in the country.

The survey allowed the team to draw conclusions about constraints and opportunities in developing the tourism sector in Tajikistan. The results of the survey confirmed and complemented some of the information collected by the team during focus group meetings with stakeholders, as well as discussions with individual tour operators in Tajikistan and abroad. This exercise provided a snapshot of the country's tourism offerings, as well as the behavior and interests of tourists who arrive in Tajikistan through tour operators. Quotes from tourists and other tourism-related sources are utilized throughout this document to support and enrich the quantitative observations, and to provide context to the findings. Tourism satisfaction surveys will be implemented under the REDP, and the findings are expected to validate and strengthen the present analysis.



TOURISM TRENDS IN TAJIKISTAN

Rudaki Monument, Dushanbe



CURRENT AND POTENTIAL DEMAND

Tajikistan is already catering to adventure tourists from high-income countries, who are predominantly interested in nature-based and cultural activities, and to visitors from countries with large volumes of outbound tourism. Based on survey findings, tour operators offer Tajikistan itineraries mostly to older, more experienced tourists from Europe, North America, and Australia. Tajikistan also attracts visitors from the high-potential Chinese market (Table 1).

Although demand has increased, there is still unrealized potential for tourism in Tajikistan. Over 80% of tour operators reported that demand for tourism to Tajikistan has increased in the last two years (Figure 4). Respondents felt that the increase in demand has resulted in large part from a growing knowledge and awareness about Tajikistan and the region in general (Figure 5). Nearly half (46 percent) of incumbent domestic operators and 89 percent of incumbent international operators believed that Tajikistan has not yet reached its tourism potential (Figure 6). The difference between international and domestic operators is indicative of the need to build capacity to improve the country's tourism offerings and services to tap into the potential demand.

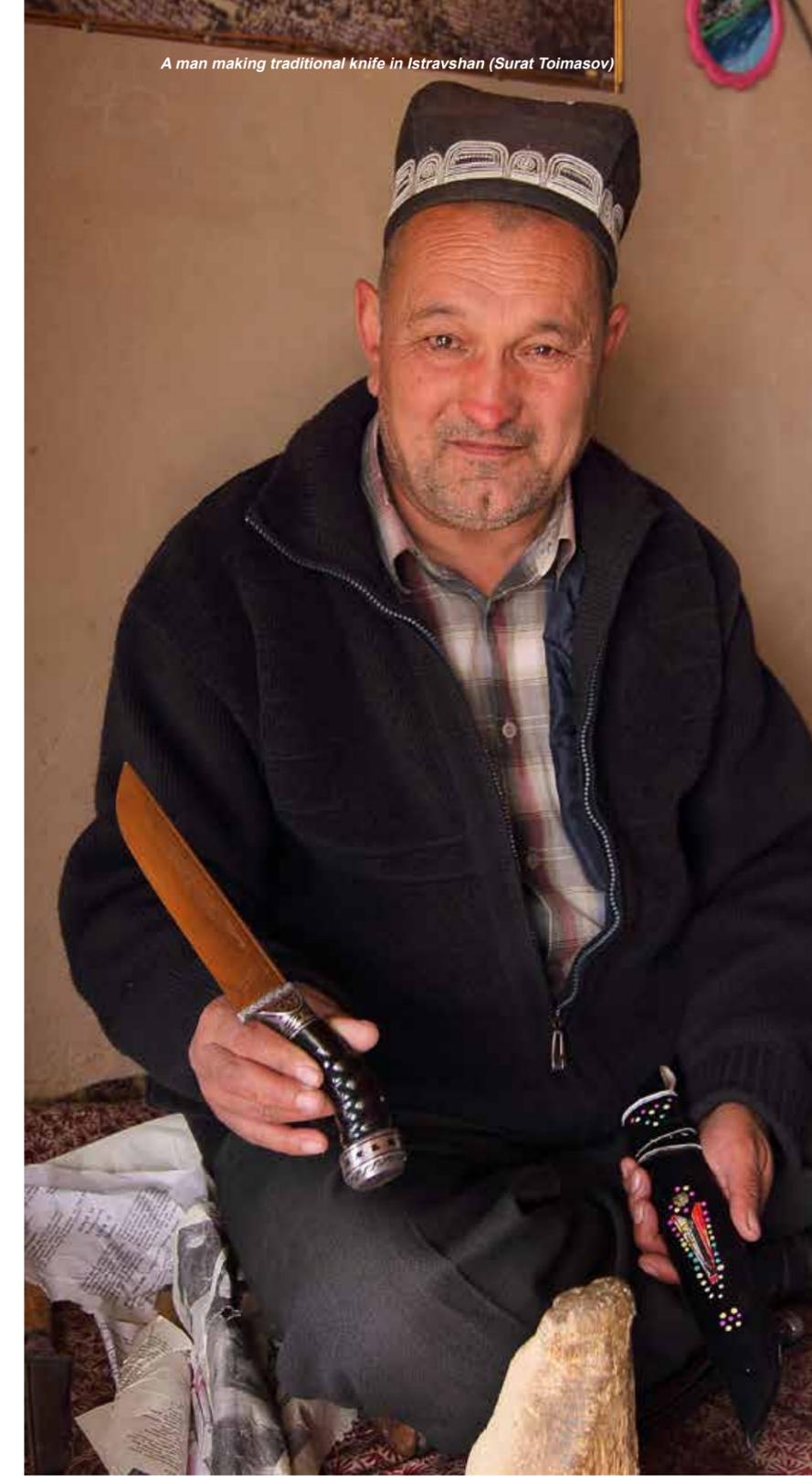
Despite its proximity to Afghanistan, Tajikistan remains a safe destination to visit. The majority of incumbent tour operators surveyed reported that they were somewhat or very satisfied with the current security situation in Tajikistan, and approximately 95% reported that they were not affected by the terrorist attack in the summer of 2018 (Figure 9 and Figure 10).

HOW TO CAPTURE MORE SPENDING

Tajikistan can capture more tourism spending. Tourists visiting Tajikistan as part of a multicountry tour stay for an average of six days and spend \$800. Those visiting only Tajikistan stay for 12 days and spend \$1,400. This includes an average of \$200 in out-of-pocket spending, but excludes air travel. This expenditure is significantly below the global average. The United Nations World Tourism Organization reports that adventure tourists spend an average of \$3,000 on an eight-day trip.

There is significant untapped demand among operators who do not cover Tajikistan, which could be captured through better promotion of the country as a destination. Almost two-thirds of the international operators surveyed who did not offer tours to Tajikistan would be interested in doing so (Figure 7). The vast majority of these operators reported that the lack of availability of destination information and low demand from clients are the main reasons for not offering trips at the moment (Figure 8).

Tajikistan offers both nature-based and culture-based tourism, but international operators are yet to fully discover the latter. Tourists currently visiting Tajikistan are almost equally interested in cultural and natural sites, but international tour operators primarily offer nature-based products (Figure 11). Strengthening cultural tourism offerings would increase opportunities for spending and widen the country's appeal.





Hindikush, seen from Shakhdara, GBAO (Surat Tolmasov)

By improving the quality and variety of tourism products, Tajikistan could encourage tourists to stay longer and spend more money. Tourists spend almost the same amount of money per day on trips to Tajikistan as part of a multicountry tour as they would on a Tajikistan-only tour (Figure 13), but they stay in the country twice as long, on average, during a Tajikistan-only tour (Figure 12). Better links to multicountry packages, improved tourism offerings, and opportunities for a longer stay in the country could therefore attract a larger share of tourism spending to Tajikistan. More specifically, domestic operators believe that better transport and local souvenirs would increase tourism spending, whereas for international operators quality of food and better accommodation are the critical factors (Figure 15).

Guided package tours attract premium prices, and local tour operators in Tajikistan can extract more value from this type of tourism by better linking to the tour-based market, whether directly or through international tour operators. Based on available data, a tour-guided tourist spends approximately twice as much per day as a backpacker. Based on the

results of the survey, 70% of the price of a tour package purchased from a foreign company is transmitted to the local tour operator (Figure 17). Building the capacity of local tour operators will allow them to attract more tour-based tourists through international tour operators and to directly link to their markets.

Most operators cater to international tourists only, making domestic tourism an undertapped market. Domestic tourism accounts for three-quarters of total travel and tourism spending globally (World Travel and Tourism Council, 2018). In Tajikistan, the majority of tour operators cater to international tourists only (Figure 18). Among tour operators who reported catering to both international and domestic visitors, only a quarter of their tourists are local. Local tourists are predominantly men, and generally younger than their international counterparts.. Domestic tourism, particularly among young men who are likely to be interested in rural tourism, helps to address seasonality and allows tourists and tourism spending to be dispersed to areas less often visited by international tourists. This is an area that could be further developed in Tajikistan.



Most tourists visiting Tajikistan through tour operators are from high-income countries in North America and Europe, or from China and Australia.

Figure 1. Tourists' region of origin

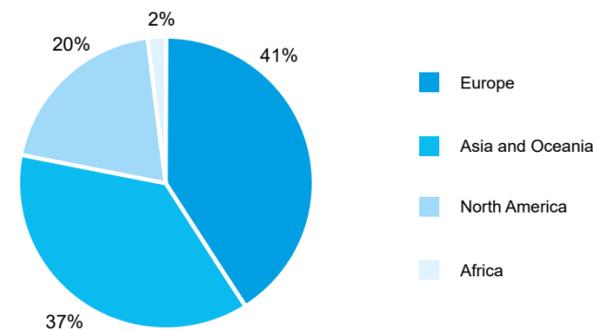


Table 1. Top countries of origin of tourists

USA	12%
Germany	11%
China	11%
UK	9%
Australia	7%
France	6%
Canada	5%
Italy	5%
Russia	4%

International tourists are mostly middle-aged and equally distributed between men and women.

Figure 2. Gender of international tourists visiting Tajikistan

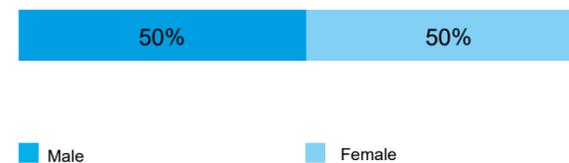
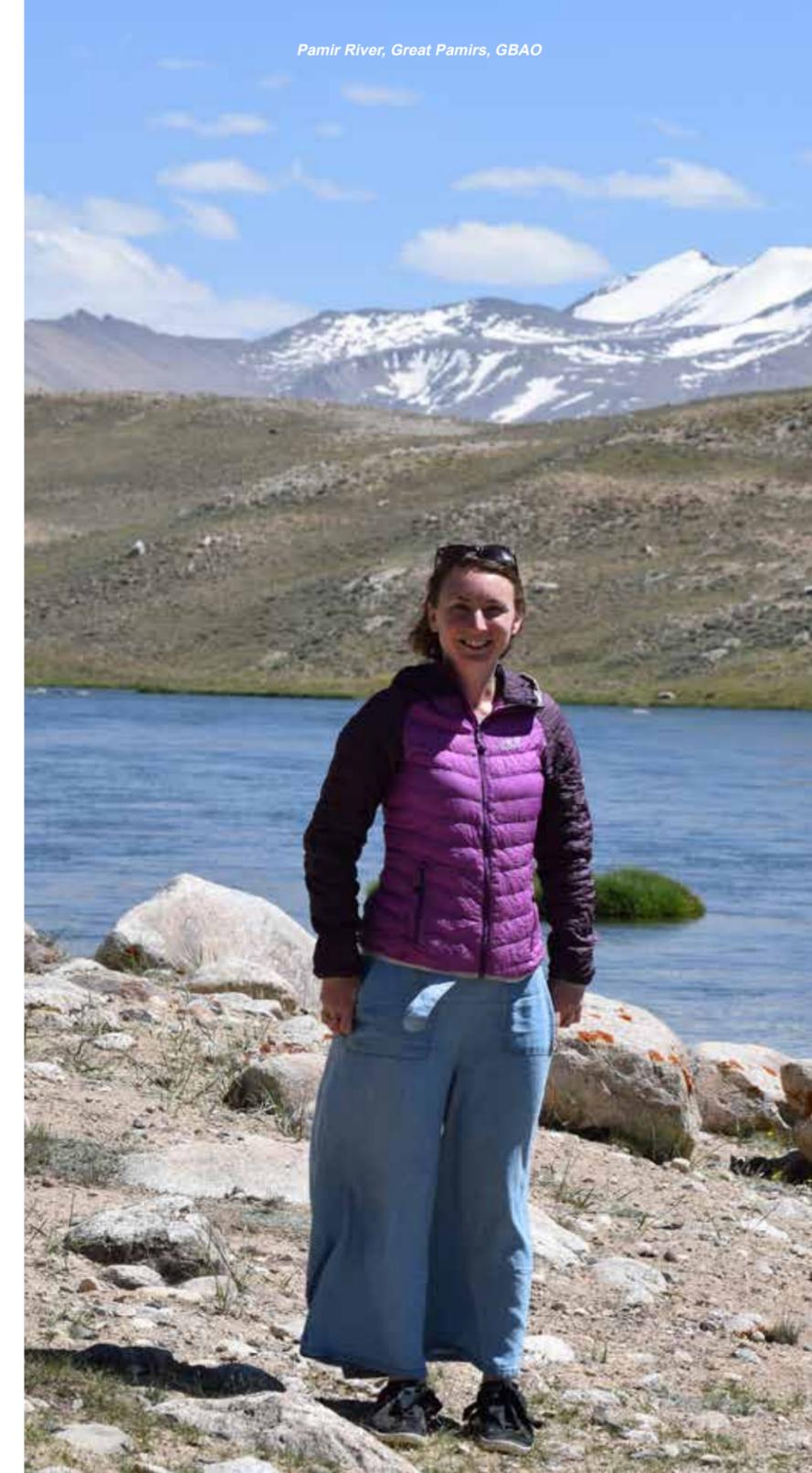
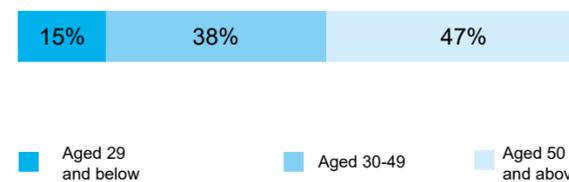


Figure 3. Age brackets of international tourists visiting Tajikistan



Tajikistan has seen an increase in tourism demand, due mostly to increased knowledge about the region.

Figure 4. Change in demand over the past two years

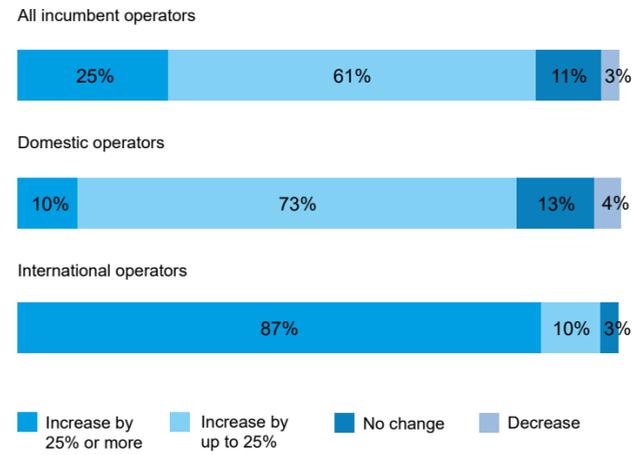
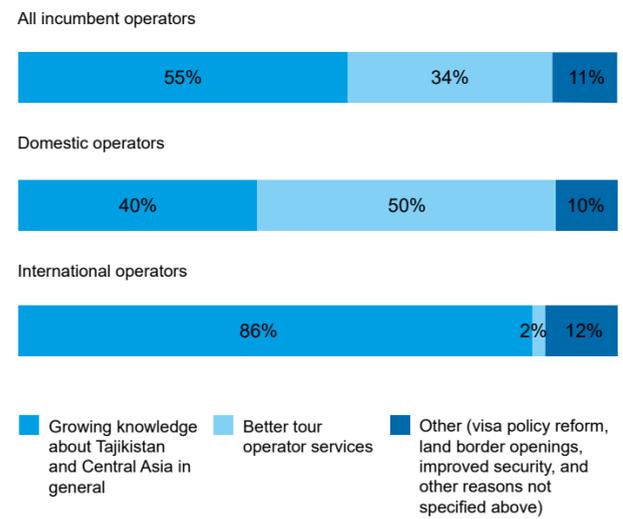


Figure 5. Reasons behind the increase in tourism arrivals

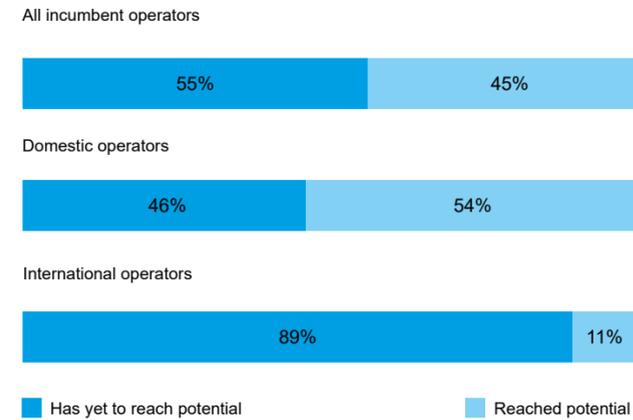


Castle Karon, Darvaz, GBAO



According to tour operators, however, the country has yet to reach its tourism potential.

Figure 6. Whether or not Tajikistan has reached its tourism potential

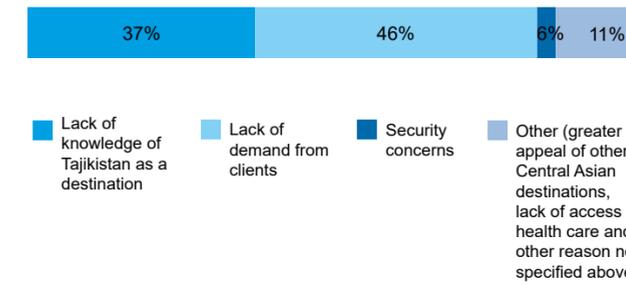


There is significant untapped demand for travel to Tajikistan, which could be captured through better country promotion.

Figure 7. Interest of international tour operators not yet offering tours to Tajikistan



Figure 8. Reasons why international operators are not offering tours to Tajikistan



Despite its proximity to Afghanistan, incumbent operators believe that Tajikistan remains a safe place to visit.

Figure 9. Satisfaction rating of the current security situation in Tajikistan

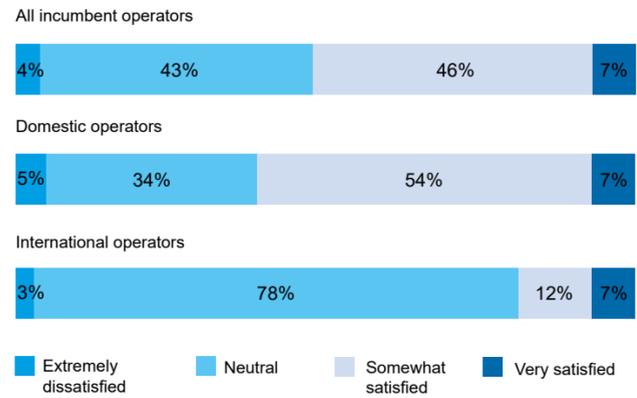
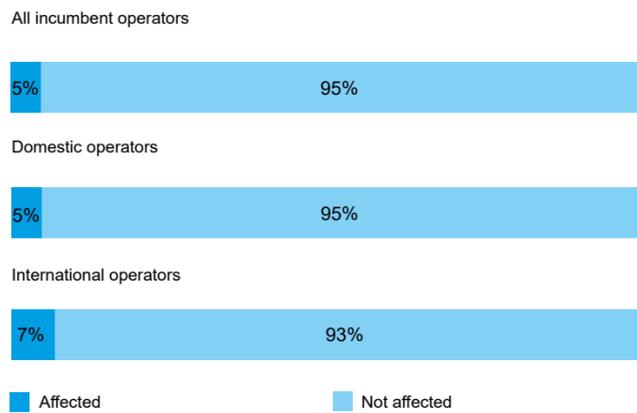
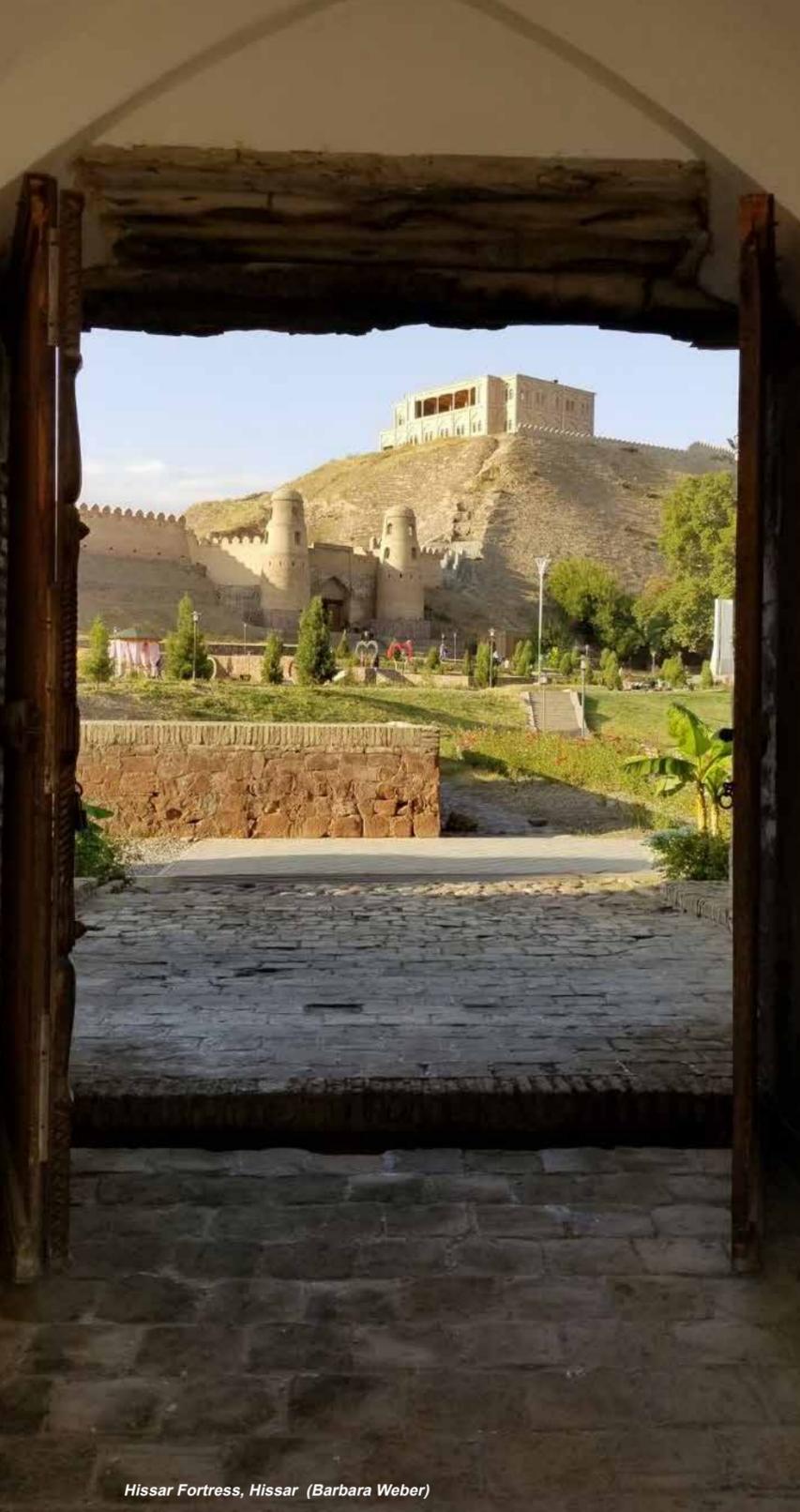


Figure 10. Affect of Tajikistan's current security situation on tour operators



"My wife and I lived on the opposite sides of the country. We both used public transport and shared taxis exclusively and traveled throughout the country. Travel there has no safety issues with local people. They will take care of you."
Male (USA), Lonely Planet

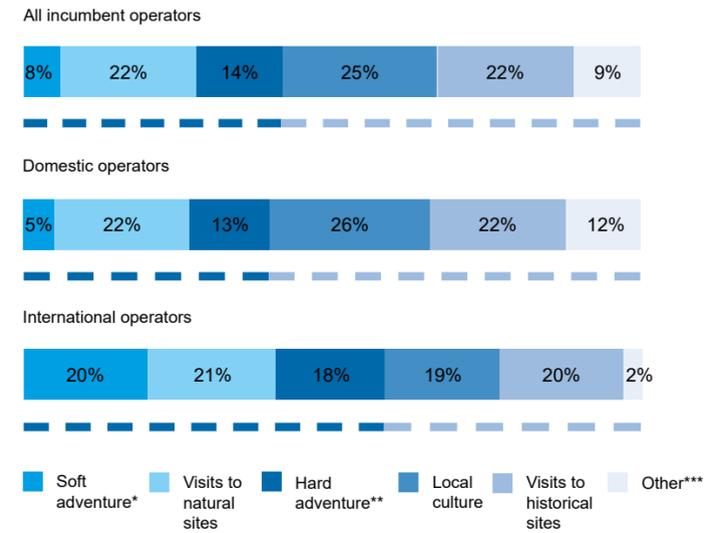
Wakhan Corridor, GBAO (Surat Toimasov)



Hissar Fortress, Hissar (Barbara Weber)

Although Tajikistan offers both nature-based and culture-based tourism, international operators are less likely than their domestic counterparts to offer the latter.

Figure 11. Types of activities tourists are interested in



Nature-based tourism: hard adventure, soft adventure and visits to natural sites.

Culture-based tourism: Immersion in local culture and cultural activities.

* activities that require little or no experience and are low risk.

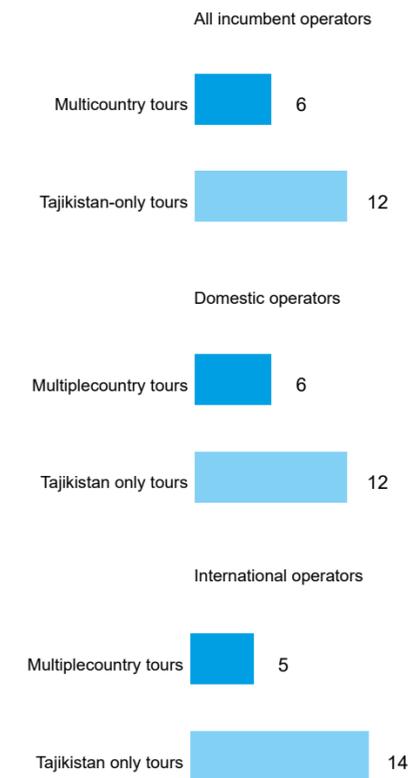
** physically demanding, risky, and challenging activities that require skill, specialized training, and willpower.

*** duty-free shopping, spas, resorts, etc.

“The famous traders of the Silk Road still live in remote villages up in the mountains. Medieval mosques, ancient settlements, magnificent fortresses, Islamic shrines and even Buddhist relics can be found in today’s Tajikistan. Many Soviet monuments like that one of Lenin and neoclassical soviet buildings still exist in big cities...allowing travelers see and sometimes experience the reality of Soviet rule. So for lovers of history and culture, Tajikistan offers both.”
Indy Guides, 2018

Attracting more Tajikistan-only visitors and encouraging multicountry tourists to stay longer would increase tourism spending.

Figure 12. Median length of stay in Tajikistan by type of tour itinerary (days)



Market Square Panjshanbe, Khujand (Surat Toimasov)



Pamiri dance, GBAO

Tourists spend the same amount per day on their Tajikistan-only packages as they would on the Tajikistan portion of their multicountry tour.

In addition to the cost of the tour, tourists pay approximately \$200 in out-of-pocket expenses.

Figure 13. Median tour package price excluding airfare by type of tour itinerary (US dollars per day)

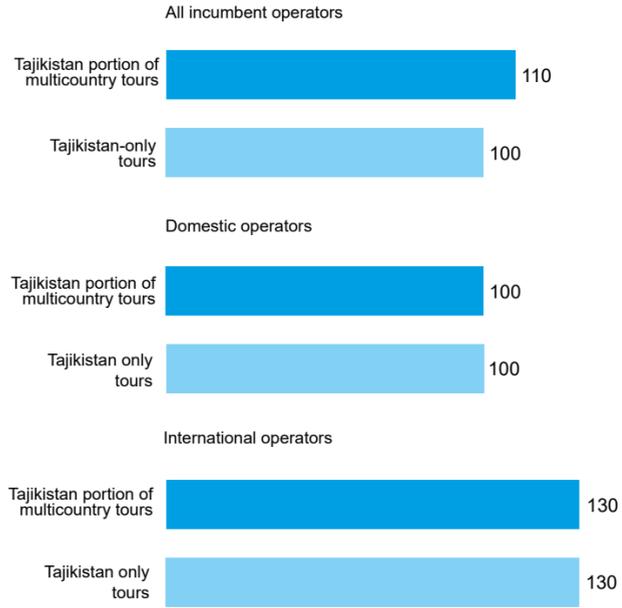
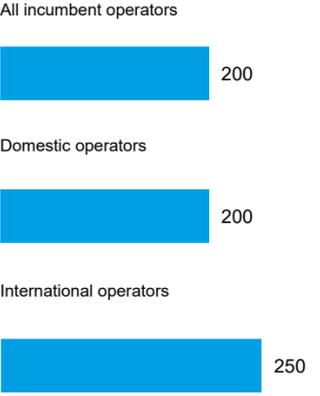


Figure 14. Median out-of-pocket spending per trip (US dollars)

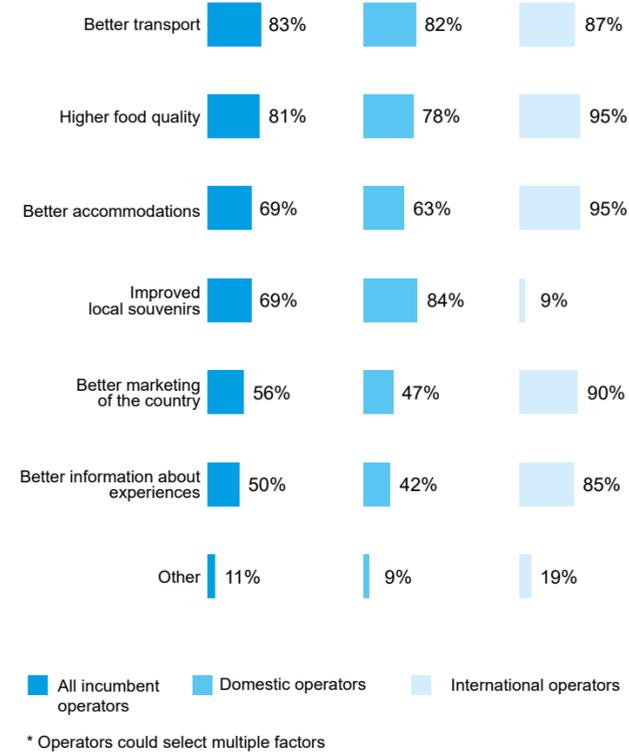




Panjshanbe Market, Khujand (Surat Toimasov)

More developed transport, food, and accommodations would increase tourism spending, while better marketing of the country and improved information about tourism experiences would encourage tourists to stay longer.

Figure 15. Share of tour operators stating that improving these factors would encourage tourists to stay longer in Tajikistan and spend more*



Incumbent international tour operators typically work with local operators to organize tour packages, and on average 70% of the package price is transferred to the local operator.

Figure 16. How incumbent international tour operators organize tour packages

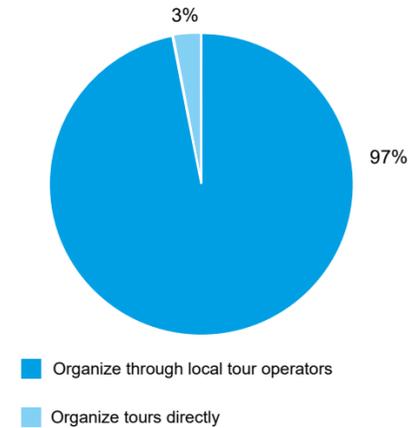


Figure 17. Share of total package price going to local tour operators



Wakhan Corridor, GBAO (Surat Toimasov)



Apple picking in Shamsiddin Shohin District, Khatlon Region

Incumbent operators cater primarily to international tourists, leaving domestic tourism—which serves mainly younger men—an untapped market.

Figure 18. Types of tourists that operators cater to in Tajikistan

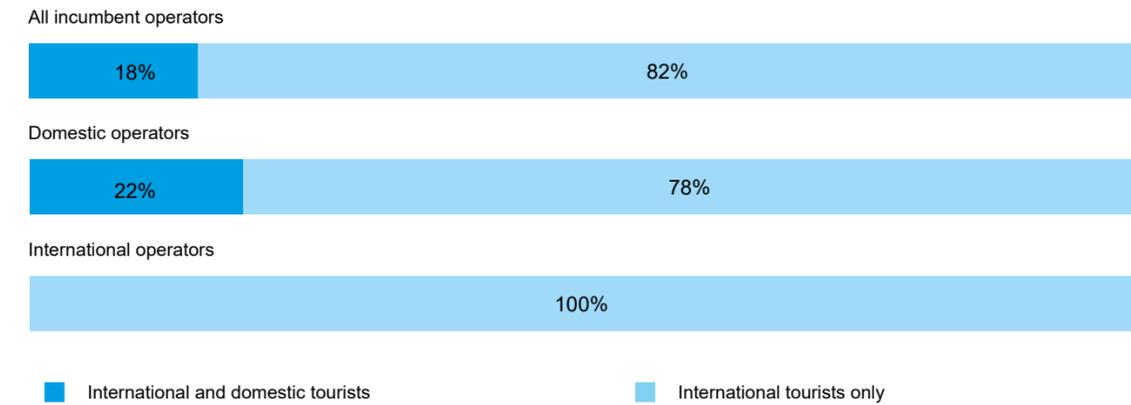


Figure 19. Gender of domestic tourists

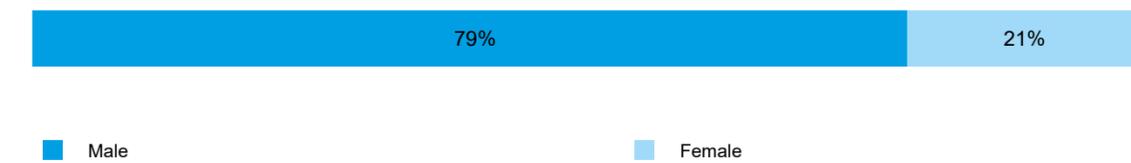
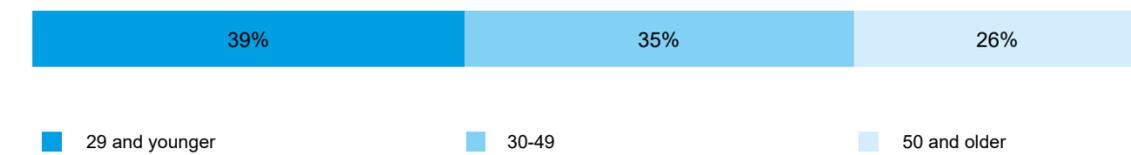


Figure 20. Age of domestic tourists





TOURISM SERVICES IN TAJIKISTAN

Pamir Highway, GBAO (Surat Toimasov)

HOW CAN TOURISM SERVICES IN TAJIKISTAN IMPROVE?

On average, tour operators are satisfied with what Tajikistan has to offer. Survey respondents assessed three main categories of tourism services: (i) tourism offerings (including sites, attractions, handicrafts, guides, and activities), (ii) hospitality (including accommodations and food), and (iii) transportation (into and within the country).

Operators suggest a mix of priority interventions to support tourism development. Enhanced country promotion, improvement of hospitality services, better domestic and international air connectivity, preservation of sites, and simplification of regulatory environment are considered top priority by most respondents (Figure 32).

TOURISM OFFERINGS

The novelty of the experience is hampered by poor services at and around sites. While international operators are significantly more satisfied with the novelty of what Tajikistan has to offer, the quality of this experience could improve by improving sanitation services, touristic signage, and the condition of trails (Figure 22).

HOSPITALITY

Homestays: Basic sanitation should improve, as this received the lowest satisfaction rating (Figure 23). For international operators, in particular, it is important to also simplify booking procedures.

Hotels: Clients should receive a quality of service that matches the price. For hotels overall, international operators were less satisfied than their domestic peers across all measures, and price in particular received the lowest satisfaction rating (Figure 24).

Food: Improving the quality, safety, and presentation of food in restaurants is critical for increasing tourists satisfaction levels (Figure 27). The fact that international tour operators do not bring tourists to restaurants and prefer to feed their clients by purchasing food and cooking it themselves is indicative of a widespread problem with restaurants in Tajikistan (Figure 28). Improving food quality and hygiene will increase restaurant usage among both international and domestic tour operators.

TRANSPORTATION

Travel into Tajikistan: There is a need to increase the frequency of flights and the number of land border crossings. Frequency of flights received the lowest satisfaction rating regarding transportation into Tajikistan (Figure 30). For those who enter the country by land, particularly international operators, border-crossing procedures posed the most significant challenge.

Travel within the country: Internal flights and road signage need to be improved. Once in Tajikistan, availability of internal flights and road signage were least satisfying to operators (Figure 31). Domestic operators were generally more satisfied with in-country transportation infrastructure than their international counterparts.

WHAT COULD THE IMPACT OF IMPROVEMENTS BE?

If improvements were made to accommodation services, tour operators believe that tourists would pay approximately 30% more for hotels and approximately 60% more for homestays. This would boost average spending on hotels from \$48 to \$62 per night per person, and on homestays from \$14 to \$23 per night per person (Figure 25 and Figure 26).

If improvements were made to food offerings, operators believe that tourists would pay approximately 70% more for their meals. This would increase average spending on food from \$9 to \$15 per meal per person (Figure 29).



Shashlyk "Kabab", Khujand (Surat Toimasov)

International tour operators report lower overall levels of tourism satisfaction in Tajikistan than domestic operators.

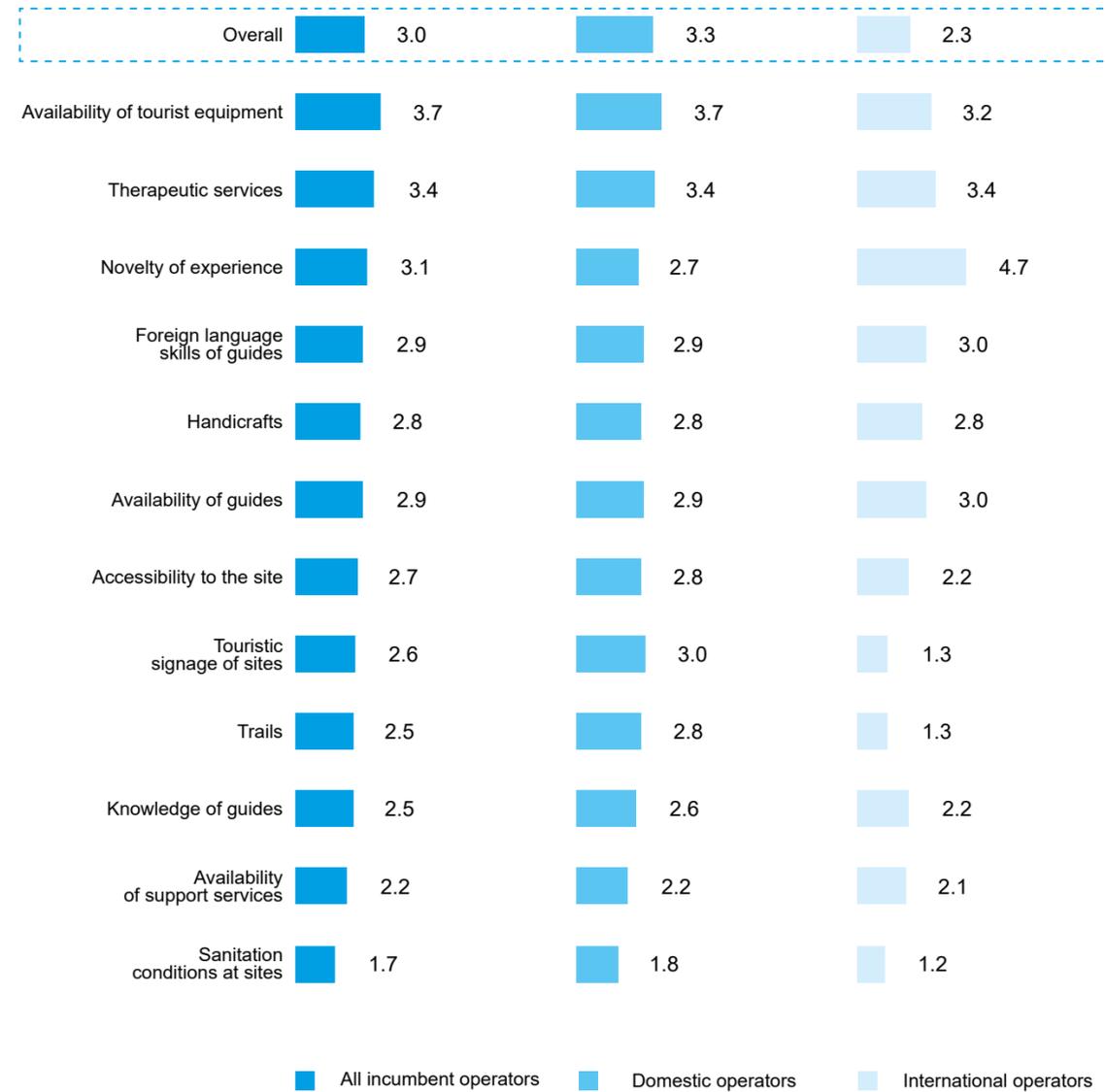
Figure 21. Average tourism satisfaction ratings: 1 (extremely dissatisfied) – 5 (very satisfied)

	Domestic operators	International operators
Tourism offerings	3.3	2.3
Hospitality	3.5	2.5
Transportation	3.5	2.5



While incumbent international operators are satisfied with the novelty of the Tajik tourism experience, sanitation, signange, and especially trails are considered to be of low quality.

Figure 22. Average satisfaction rating of site attractiveness, tour services, and activities: 1 (extremely dissatisfied) - 5 (very satisfied)



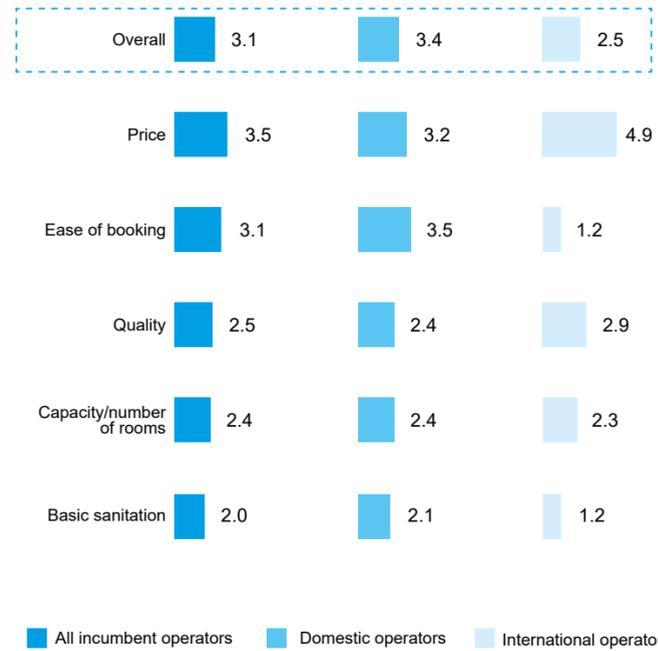
Khoja Mashhad Mausoleum, Khatlon Region



Fan Mountains, Aini area, Sughd Region

Accommodations provided by homestays are convenient, but tour operators, especially international ones, are highly dissatisfied with basic sanitation and with the ease of booking, although the latter is less of a concern for domestic operators.

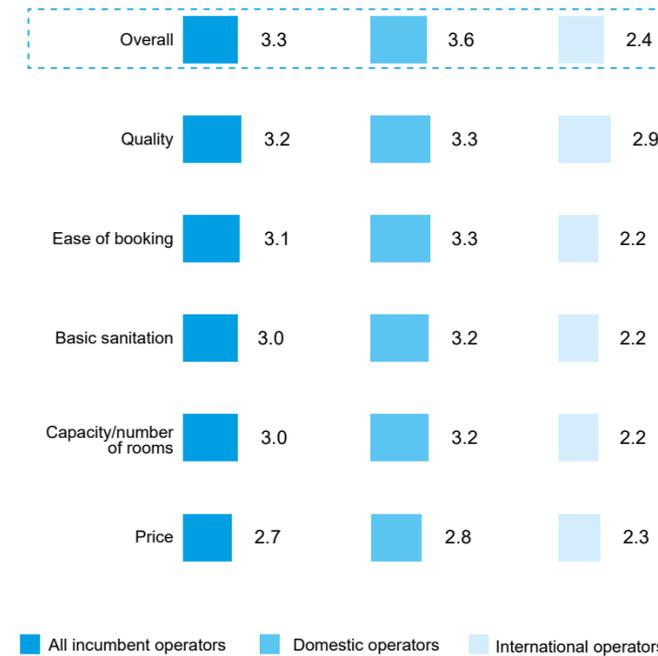
Figure 23. Average satisfaction rating of homestay services: 1 (extremely dissatisfied) - 5 (very satisfied)



“The Pamir highway is the highlight of any trip in Tajikistan if you want to explore mountains, villages and nature. But do not expect hotels along the way. In remote places you can only sleep in a Homestay or Guesthouse (beds and food are usually good, but bathrooms are not always working well).”
Frederique B. (United States), Trip Advisor, June, 2018

Hotels are considered too expensive for the quality offered and receive average ratings across all criteria, with satisfaction levels being much lower among international tour operators.

Figure 24. Average satisfaction rating of hotel services: 1 (extremely dissatisfied) - 5 (very satisfied)



Serena Inn, Khorog, GBAO



Osh palov, UNESCO Intangible Cultural Heritage

If accommodations were to improve, tourists would be willing to pay up to 30% more for hotels and approximately 60% more for homestays.

Figure 25. Spending on hotels by tourists (US dollars, per night, per tourist) today versus in the future, once improvements are made

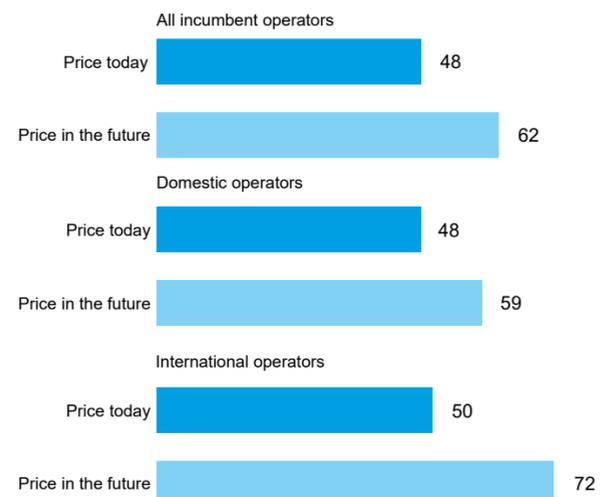
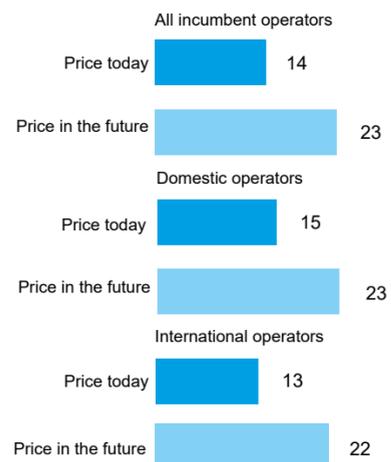
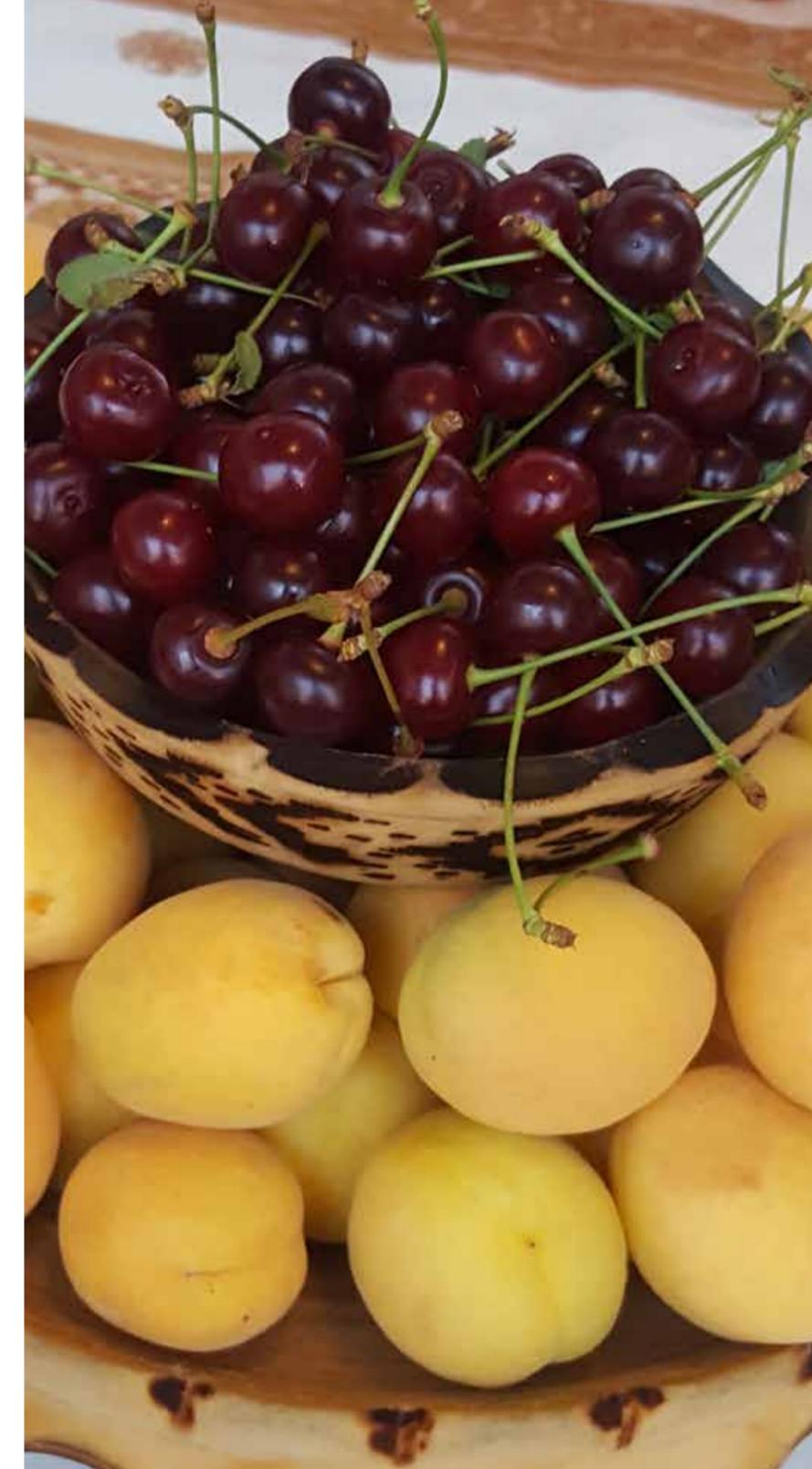
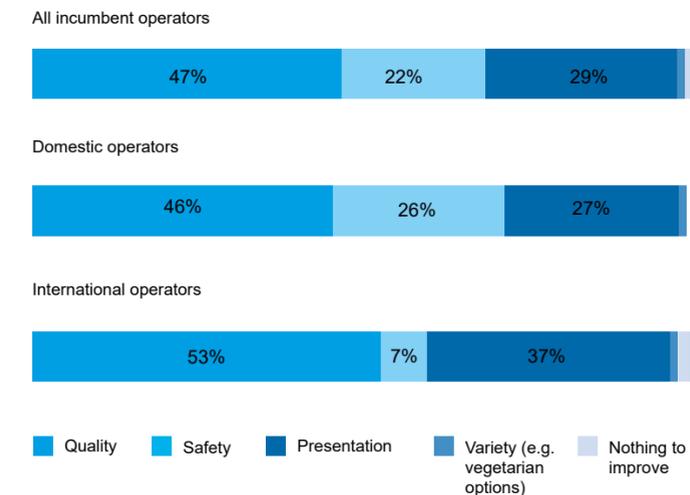


Figure 26. Spending on homestays by tourists (US dollars, per night, per tourist) today versus in the future, once improvements are made



Quality, safety, and presentation of food need to improve for tourists to use more local restaurants...

Figure 27. Characteristics of food that should improve so that tourists spend more in restaurants

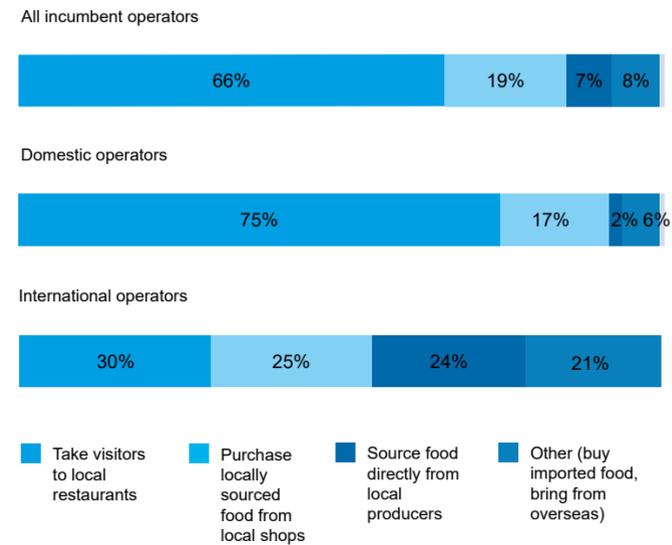




Cooking the Sumanak at Navruz

... and most international operators are reluctant to use local restaurants to feed tourists.

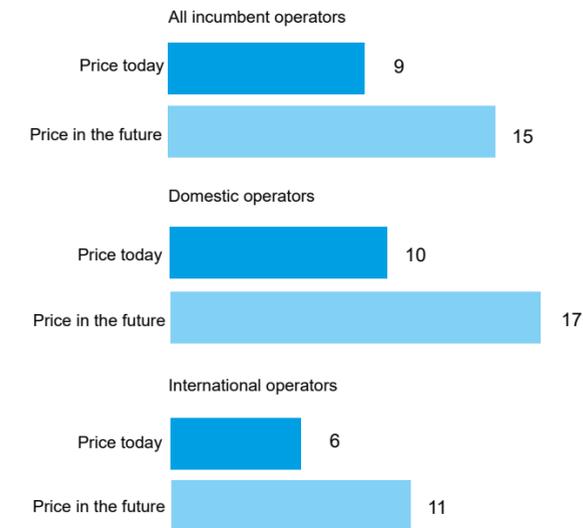
Figure 28. How operators organize food for their tourists



“You will not find the density or diversity of restaurants typical in some other parts of Asia. Restaurants in Tajikistan (particularly those situated outside of Dushanbe) typically have a limited menu of Russian and Tajik dishes. It is rare for everything listed to actually be available. If the restaurant is not fully booked for a celebration you won’t need a reservation, nor to wait for a table. Service may be chaotic but it is generally good-natured.”
Bradt Guide, Tajikistan

If the quality of food offerings were to improve, tourists would be willing to pay approximately 70% more for their meals.

Figure 29. Meal prices (US dollars, today versus in the future, subject to improvements)



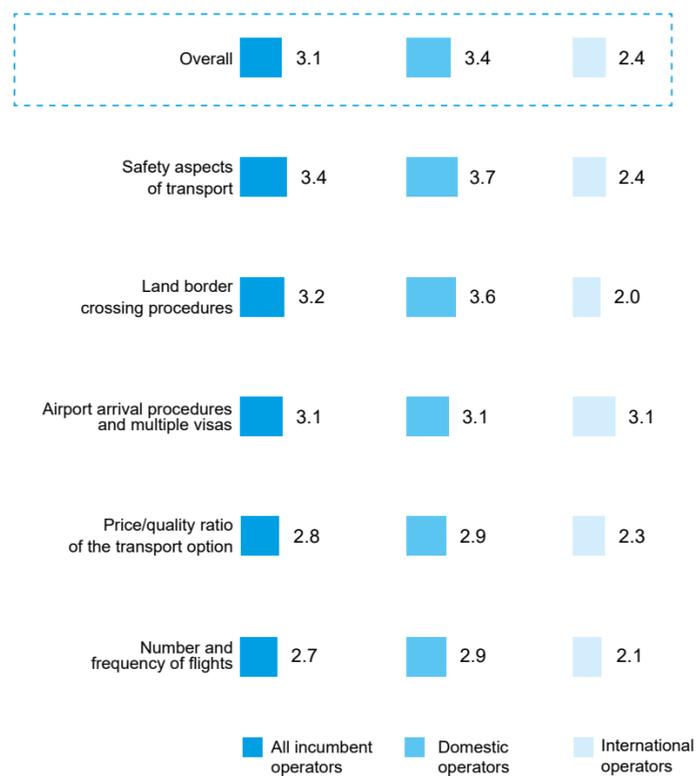
Traditional Spices, Khujand (Surat Toimasov)



Dushanbe International Airport

Transportation into Tajikistan remains problematic for international operators, particularly with regard to land border crossing procedures and frequency of flights.

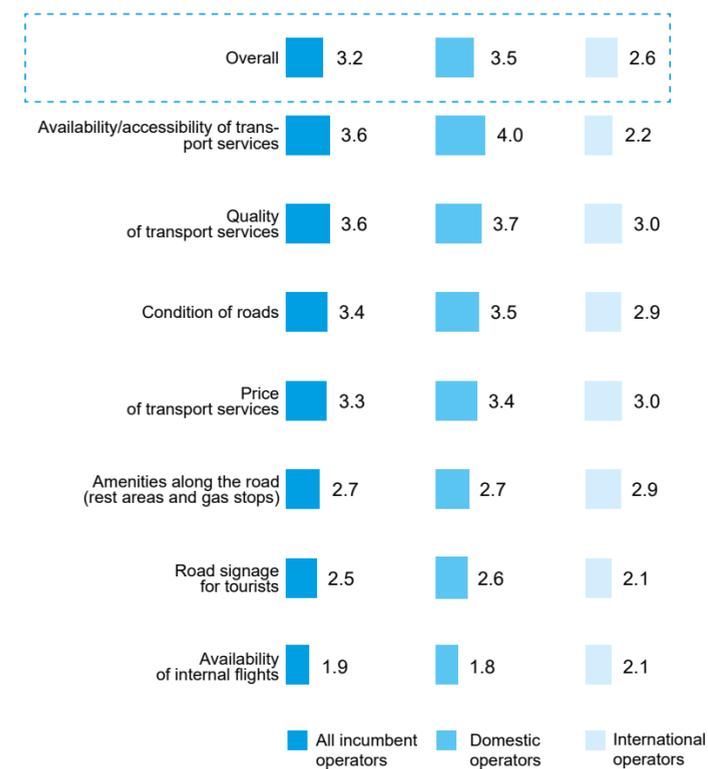
Figure 30. Average satisfaction rating of transportation into Tajikistan: 1 (extremely dissatisfied) - 5 (very satisfied)



“To a large degree, my journey was dictated by flight schedules. Dushanbe does not exactly boast many flight options: around 15 scheduled daily departures from its modestly sized airport mainly serve cities in Russia, with at least 4 daily flights to Moscow. There are twice weekly flights to Istanbul with Turkish Airlines and Dubai with Flydubai... Other, less frequent, flights connect Dushanbe with Almaty, Bishkek, Kabul, Mashhad, Tashkent, Tehran and Urumqi.”
Anna, frequent traveler and blogger, 2018

Once in-country, limited internal flights and the absence of road signage constrain tourists’ experiences.

Figure 31. Average satisfaction rating of in-country transportation infrastructure: 1 (extremely dissatisfied) - 5 (very satisfied)



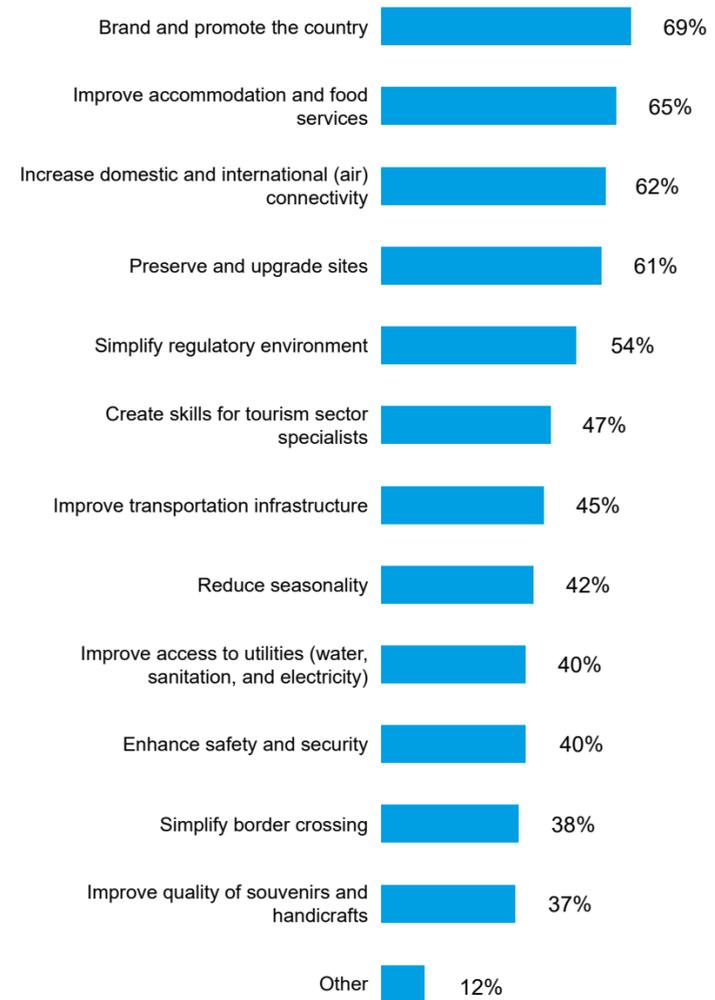
“I visited Tajikistan for 14 days and 15 nights, most of which were spent road-tripping to the next destination. The journey did not feel rushed, but we spent at least 6 hours every day in the car and often felt exhausted enough to fall asleep right after dinner, at a laughably early hour of around 8pm.”
Anna, frequent traveler and blogger, 2018



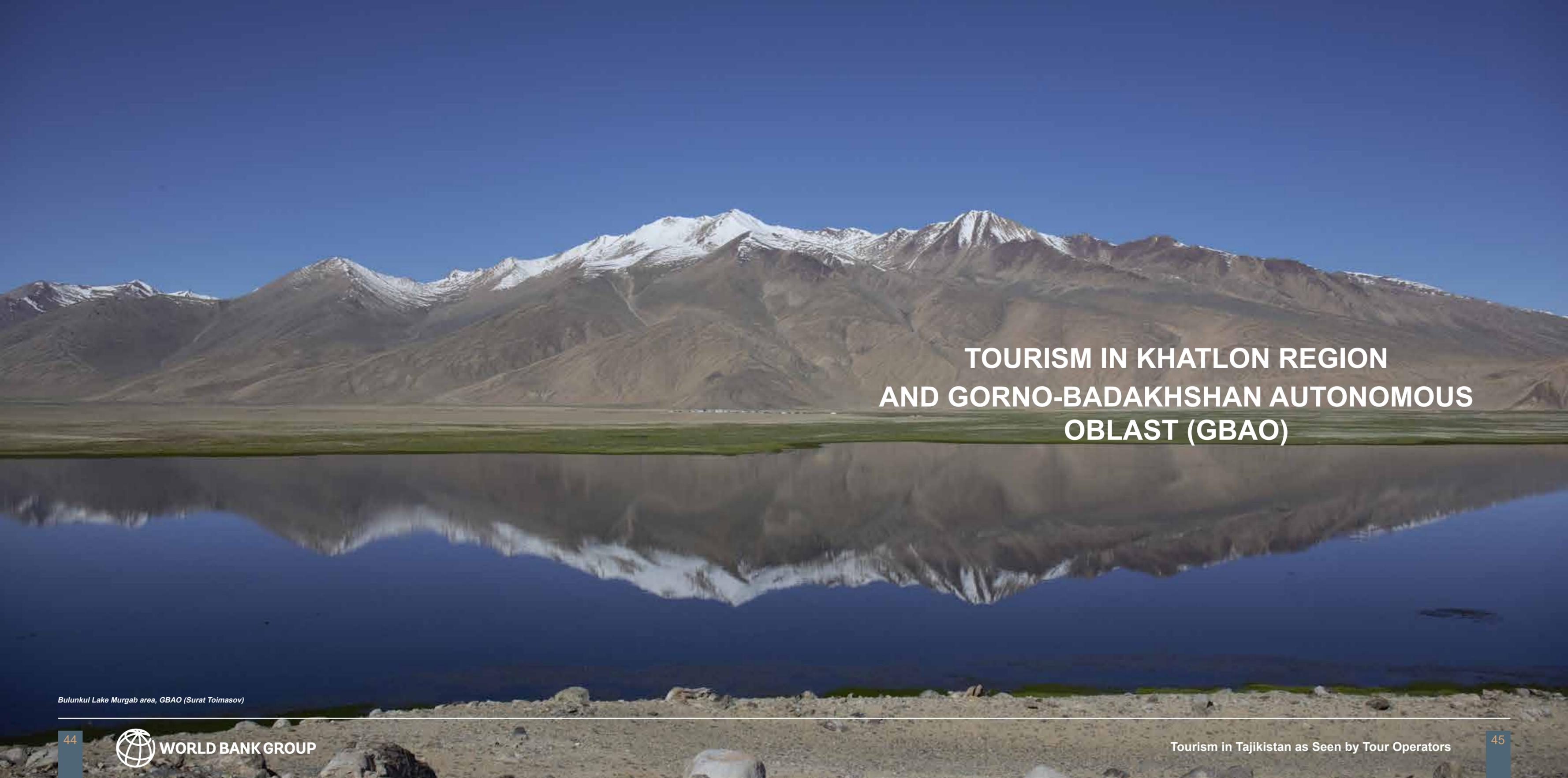
Pamir Highway, GBAO (Surat Toimasov)

Operators suggest a mix of policy, public and private sector investment, and capacity-building interventions for Tajikistan to reach its tourism potential.

Figure 32. Share of operators stating that Tajikistan should pursue the improvement



Kohi Navruz, Dushanbe



**TOURISM IN KHATLON REGION
AND GORNO-BADAKHSHAN AUTONOMOUS
OBLAST (GBAO)**

Bulunkul Lake Murgab area, GBAO (Surat Toimasov)



Pamir Lodge, Khorog, GBAO

KHATLON AND GBAO - PATTERNS AND OPPORTUNITIES

Both GBAO and Khatlon already cater to international tourists, but they have opportunities for further growth. The Wakhan Corridor (where Yamchun Fortress is located) and the Pamir Highway are the top tourist sites in GBAO. Kulob, the closest town to the Hulbuk Fortress, is the top site in Khatlon. Analysis of data from GBAO and Khatlon demonstrates three opportunities for regional growth:

- **Building Khatlon's tourism as a destination in its own right and not just as a pass-through to GBAO.** GBAO receives a significant proportion of tourists to Tajikistan, and operators bring more tourists to (and stay longer in) GBAO than Khatlon, using Khatlon merely as a route by which to access GBAO. Yet Khatlon has a lot to offer (Figure 34). The region is home to the archeological ruins of Takhti Sangin (source of the Oxus Treasure hosted at the British Museum in London), the holy site of Chiluchoschasma (where Imom Ali, the cousin and son-in-law of Prophet Muhammad, stayed to preach Islam), and the Buddhist sanctuary of Ajina Teppa (where a 12-meter-long Buddha was recovered). Lack of attention to Khatlon's cultural tourism potential excludes visitors who would be interested in exploring Tajikistan but would not appreciate the long drive from Dushanbe to popular tourism destinations like GBAO.



"Khatlon region, south of Dushanbe, is mostly a winter destination...in February and March, while the rest of the country is covered in snow, the south is already a pleasant place to be." *Caravanistan – The Silk Road Travel Guide*



A cyclist on the Pamir Highway, GBAO (Surat Toimasov)

- **Making GBAO more accessible.** Private cars are the most commonly used means of transportation to Khatlon and GBAO, especially among domestic operators (Figure 37). International operators are also interested in alternative methods of transportation, including bikes and motorbikes for both regions, and helicopters for GBAO, which could help to tap further into the two regions' unexploited potential:
 - **Bikes and motorbikes:** Bike tourism could serve as a major economic contributor. For example, a 2016 European Cyclists Federation study concluded that there are an estimated 2.295 billion cycle tourism trips in Europe with a value in excess of €44 billion per year. Developing the right infrastructure and catering to the needs of cyclists could make a significant economic contribution, especially in rural Tajikistan.
 - **Helicopters and planes:** Helicopters and planes are already being used by tourists to reach GBAO, but there are no regular, affordable services. If developed and expanded further, these could be a viable, complementary mode of transportation to GBAO, especially attracting tourists who do not appreciate the long drive from Dushanbe.
- **Improving the hospitality sector by offering better homestay experiences.** In Khatlon, where homestays are limited, hotels are used, while in GBAO, both homestays and hotels are used equally (Figure 39 and Figure 40). The experience in GBAO shows that, when homestays are offered, they are used by adventure tourists. Improving the homestay experience for tourists would appeal to the interests of adventure tourists, who are usually interested in immersing themselves in the local culture while, at the same time, channeling more tourism spending to small homestay owners in rural areas.

"Beautiful landscapes, nice people, adventure in the most peaceful place on earth! We cycled there for 3 weeks, it was the 3rd time for me to go... I am Pamir addicted!"
Vero Geoffrey (ex pat living in Dushanbe), Trip Advisor, August, 2017

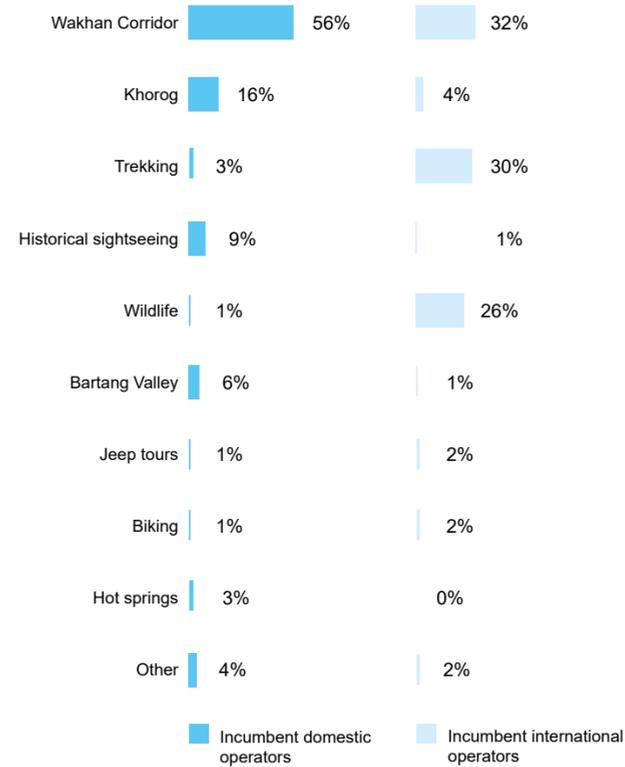




Hiking on Shokhdara Range, GBAO (Surat Toimasov)

The Wakhan Corridor and Pamir Highway are the most-visited destinations in GBAO, and international operators also have a strong interest in trekking and wildlife activities.

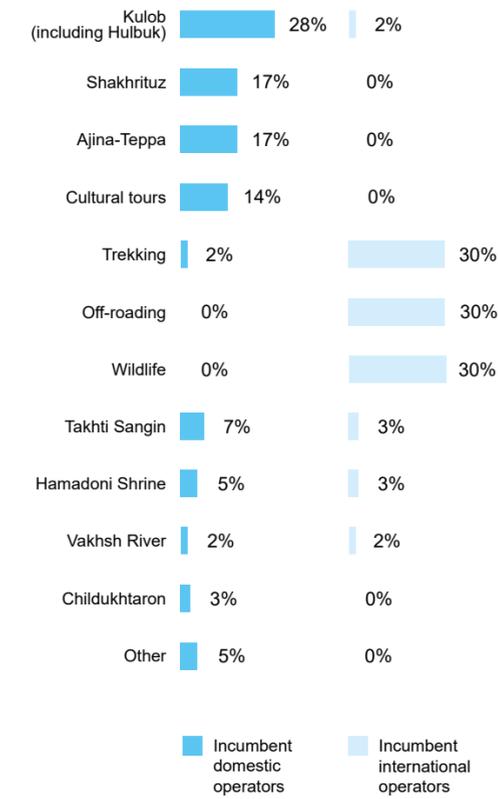
Figure 33. Share of respondents identifying most-visited sites and activities in GBAO



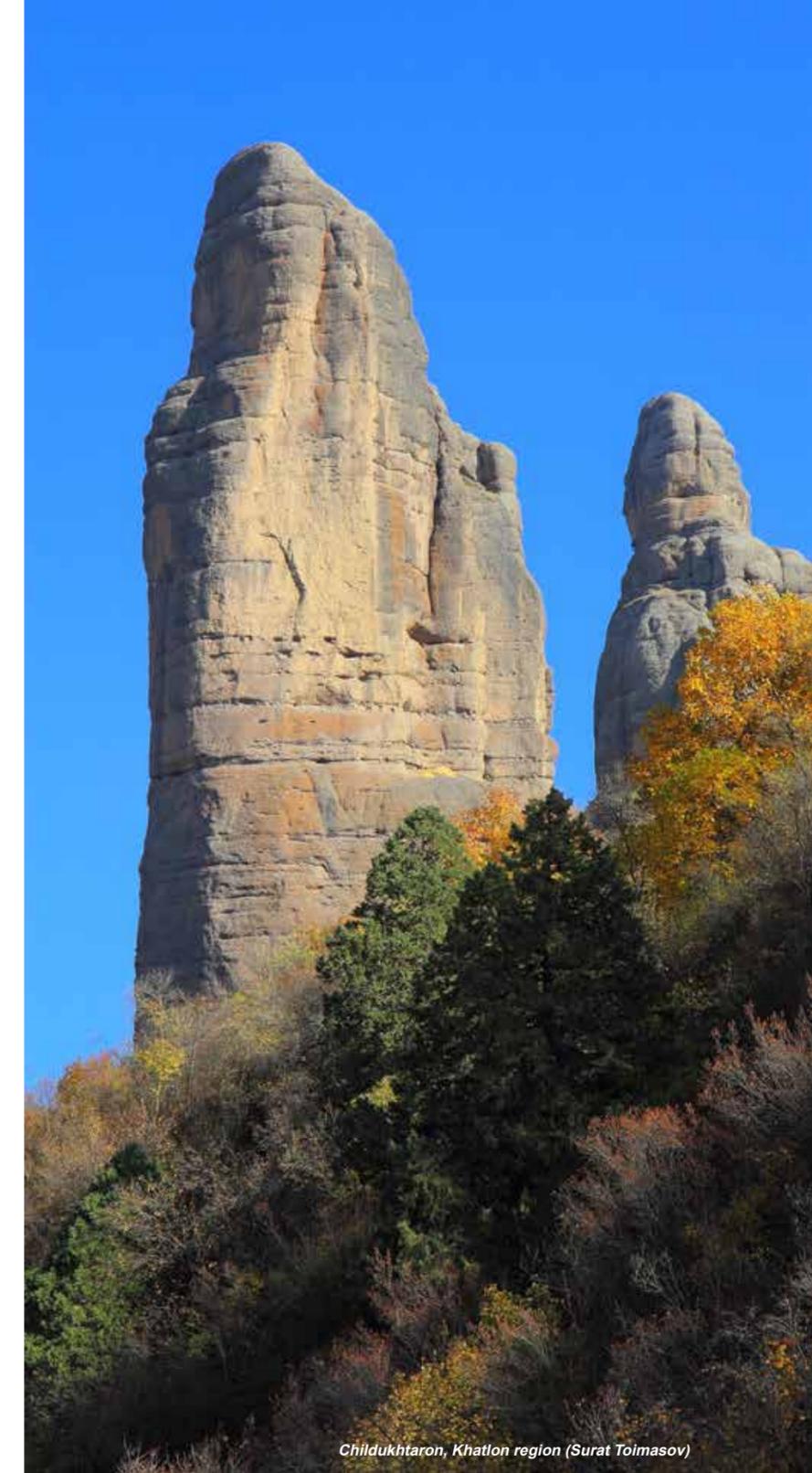
“What a beautiful drive through the mountains [of Wakhan] where every turn is more beautiful than the one before. The striations on the rocks, the symmetry of the mountains the waterfalls was indeed a wondrous sight.”
Rifty K, Florida, Trip Advisor, July, 2017

In Khatlon, international operators tend to have a strong preference for trekking, off-roading, and wildlife activities.

Figure 34. Share of respondents identifying most-visited sites and activities in Khatlon



“The third largest city in Tajikistan, Kulob feels more like a provincial town with wide open streets lined with hollyhocks and punctuated with polished civic statues. First referred to by historians in AD 737, the city celebrated a special milestone in 2006 – namely, its 2700th birthday... There are a couple of sights in and around town, including nearby Hulbuk Fortress, that make for a worthwhile break on the long drive from Dushanbe towards the Pamirs.”
Lonely Planet



Childukhtaron, Khatlon region (Surat Toimasov)

GBAO is the most popular tourist region in Tajikistan, both in terms of tourist volume and length of stay, while Khatlon is largely used as a pass-through to GBAO.

Figure 35. Average number of tourists that each incumbent operator brings to Tajikistan annually (number)

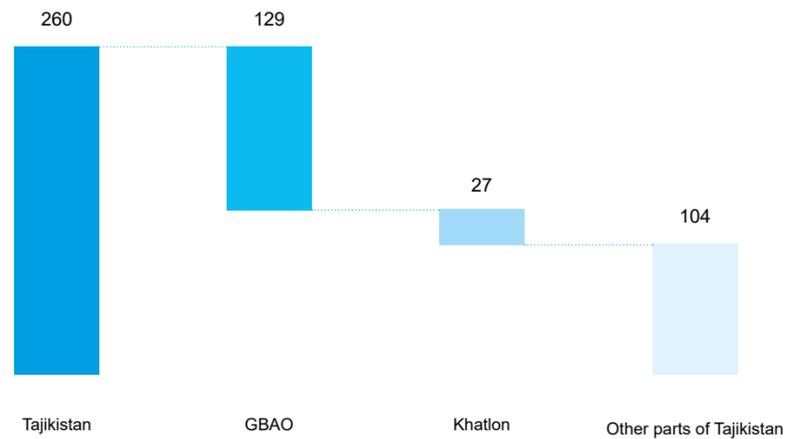
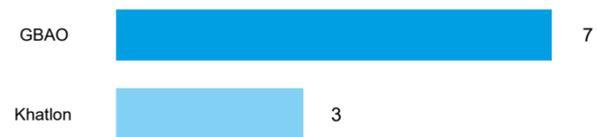


Figure 36. Incumbent operators reporting average length of stay (days)



Hiking in Pamirs, GBAO (Surat Toimasov)



Jeep adventure in Murgab area, GBAO (Surat Toimasov)

Private cars are the most commonly used means of transportation to Khatlon and GBAO, but international operators also use bikes and motorbikes, and helicopters are occasionally used to reach GBAO.

Figure 37. Modes of transportation used to take tourists to Khatlon

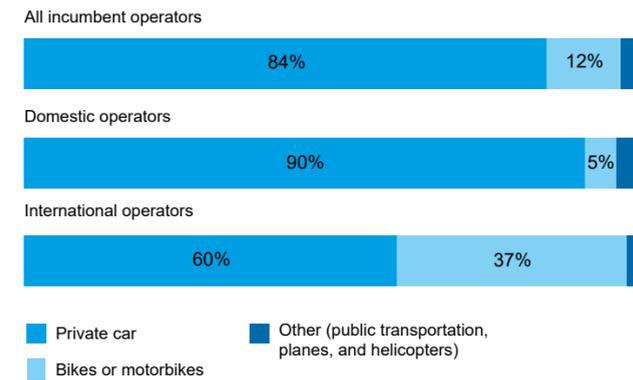
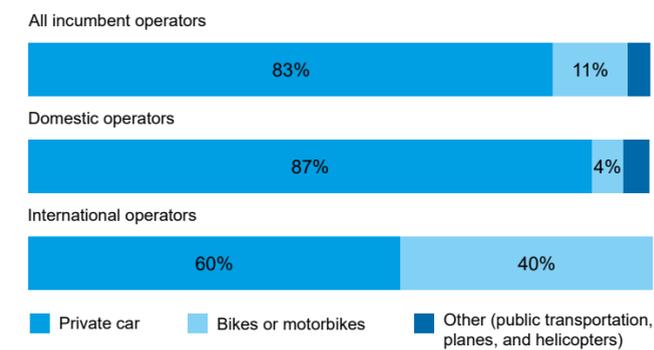


Figure 38. Modes of transportation used to take tourists to GBAO



“I cycled the Pamir in September and it was by far the toughest and most beautiful cycling experience I’ve had on a bike. A must see.”
Mehdi M. (Tunisia), Trip Advisor, October, 2018

The experience in GBAO, with a network of approximately 200 homestays, shows that homestays are an attractive accommodation option outside of Dushanbe.

Figure 39. Incumbent operators reporting frequency of use of accommodation services in Khatlon

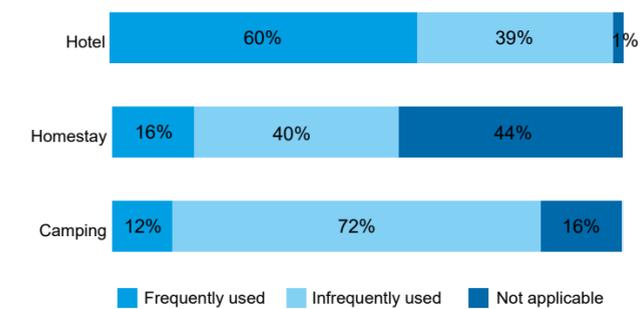
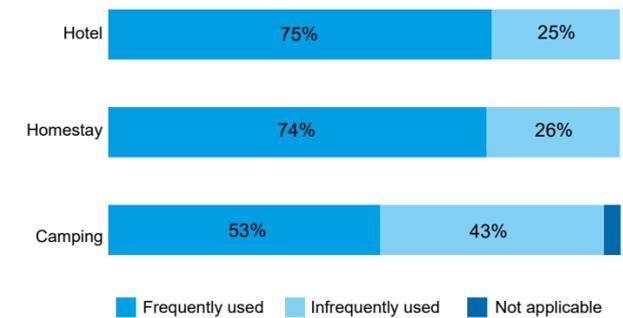


Figure 40. Incumbent operators reporting frequency of use of accommodation services in GBAO



“The Pamir highway is an unforgettable experience. Landscapes will blow you away and the lovely homestays will make the trip even more memorable.”
Tabdour, Trip Advisor, May, 2017



Guest House near Oktangi (Surat Toimasov)



PROFILE AND LIST OF RESPONDENTS

Pamir Mountains, GBAO (Surat Toimasov)



Pamir Highway, Karakul, GBAO

Most incumbent operators are from Tajikistan, and most international operators are based in Europe and North America.

Figure 41. Number of all incumbent operators surveyed

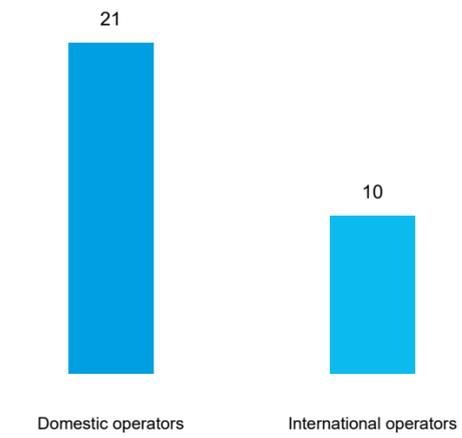
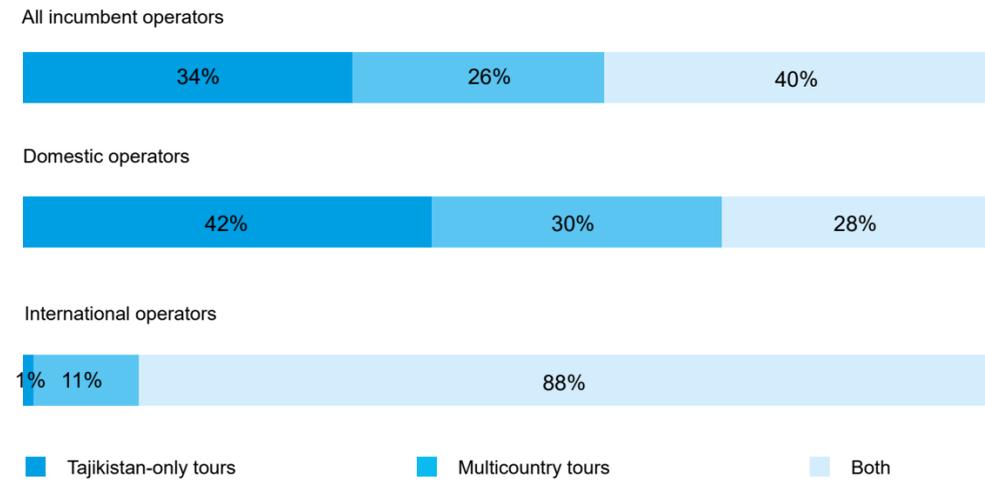


Table 2. Number of international operators by country of origin

Switzerland	3
United States	2
United Kingdom	1
Netherlands	1
Kyrgyzstan	1
Uzbekistan	1
India	1

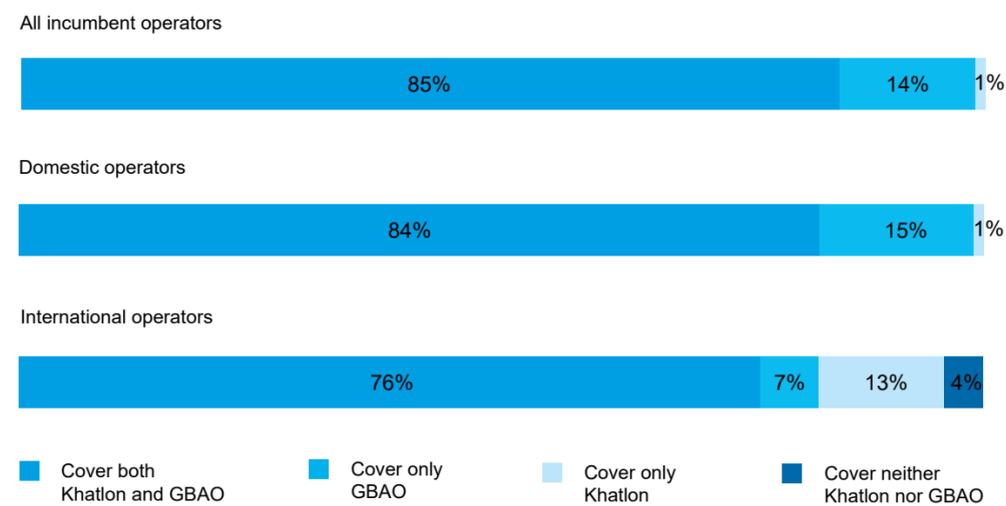
International operators tend to offer both Tajikistan-only and multicountry tours, but domestic operators offer more Tajikistan-only tours.

Figure 42. Types of tours offered in Tajikistan



The majority of tour operators cover both Khatlon and GBAO.

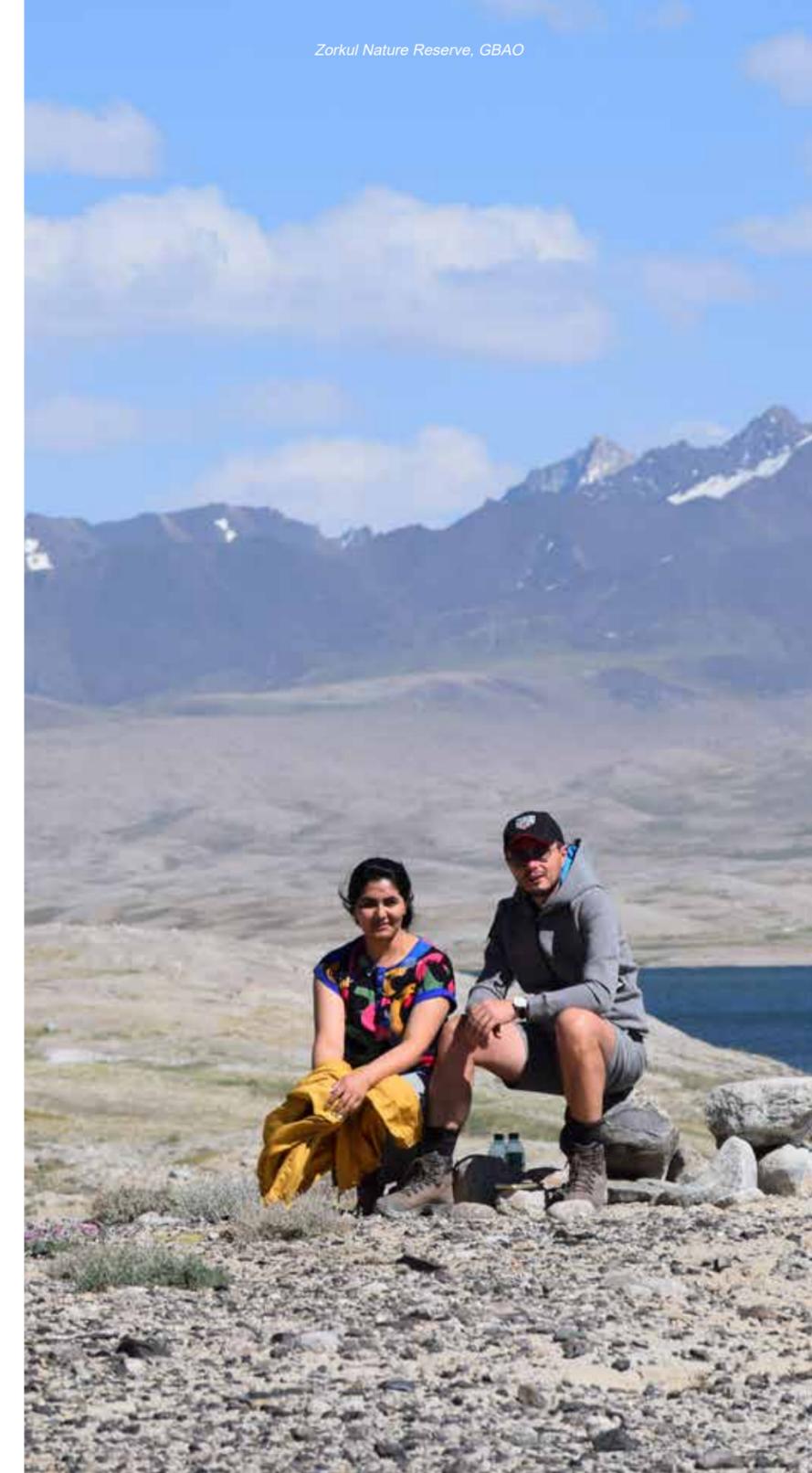
Figure 43. Tour operators' regions of coverage



This survey would not have been possible without the contributions of many tour operators who took the time to offer their views. The list below includes those who agreed to be acknowledged in this report:

- * Aziana Travel
- * Badakhshan Travel LLC
- * Berg + Tal
- * Blini Reizen
- * Indy Guide
- * Javohir Tour
- * Kalpak Travel
- * LLC "Pamir Trips"
- * LTD "Pamir Highway"
- * Pamir Adventure
- * Pamir Highway Adventure
- * Pamir Silk Travel Ko.
- * Panj Travel
- * Ptec-Travel.kg
- * Rohat-Tour
- * Sayohati Oli LLC - Paramount Journey
- * Silk Road Treasure Tours
- * Sitara International Ltd.
- * Untamed Borders
- * Wilderness Travel
- * VIP тревел энд тур
- * Памир пикс
- * Сайохат ба Помир

The quotes presented in this brochure have been extracted from various sources, including the Bradt Guide, Indy Guide, Lonely Planet, Trip Advisor, the Silk Road Travel Guide, and Anjci All Over.





MAP OF TAJIKISTAN



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