



# TOURISM ECONOMICS, MANAGEMENT AND POLICY RESEARCH

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### Kırgızistan Turizm Sektörünün Vizesiz Rejime İlişkin Görüşleri <sup>1</sup> *Opinions of The Kyrgyzstan Tourism Sector on The Visa Free Regime*

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#### MAKALE BİLGİSİ

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#### Araştırma Makalesi

#### ÖZ

Dünya çapında turizm endüstrisindeki rekabet artıyor ve bazı ülkeler daha fazla turist çekmek için vizesiz rejim politikasını aktif olarak kullanıyor. Bu makalenin temel amacı, turizm sektöründeki işçilerle yapılan bir anket yoluyla Kırgızistan'daki vizesiz rejim politikayı ampirik olarak açıklığa kavuşturmak ve incelemektir. Ankete girişimciler, yöneticiler, rehberler, sanatkârlar, müze çalışanları, ilgili devlet kurumlarının çalışanları ve turizm alanında uzmanlaşmış bilim insanları katıldı. Anket 400 kişi tarafından dolduruldu ve bunlardan 387'si geçerliydi. Anketten toplanan veriler, özel bir istatistik programı kullanılarak çapraz tablo analizi ile analiz edildi. Makalenin sonunda, elde edilen sonuçların temelinde bu konuda gelecekteki araştırmalar doğrultusunda tartışmalara yer verilip turizm politikasının iyileştirilmesine yönelik öneriler yapıldı. Sonuçlara göre turizm çalışanlarının vizesiz rejim politikasından beklentileri hala oldukça yüksektir. Turizm sektörünün sorunlarına çözüm bulmak için bütünsel, entegre bir sistem oluşturan yaklaşım bulmak gerekiyor.

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#### Research Article

#### ABSTRACT

Competition in the tourism industry around the world is increasing, and some countries are actively using a visa-free policy to attract more tourists. The main purpose of this article is to empirically clarify and study the visa-free policy in Kyrgyzstan through a survey of workers in the tourism sector. Entrepreneurs, managers, guides, artisans, museum workers, employees of relevant government agencies and scientists specializing in the field of tourism took part in the survey. The questionnaire was filled out by 400 people, and 387 responses were found to be valid. The data collected from the survey was analysed by cross-tab analysis using a special statistical program. At the end of the article is a discussion of the results obtained, on the basis of which directions for further research and proposals for improving tourism policy have been developed. According to results, the expectations of tourism workers from the visa-free policy are still very high. It is necessary to find an approach that creates a holistic, integrated system to address the tourism sector problems.

<sup>1</sup> This article was produced from the master's thesis "The impact of Visa-free Entry on the Inbound Tourism Development: A Case Study of Kyrgyzstan" belonging to the Graduate School of Social Sciences of the Kyrgyz-Turkish Manas University.

## 1. INTRODUCTION

Despite the growing popularity of the use of visa-free policies to attract foreign tourists and investors, especially by developing countries, not much research has been done on this topic. The research on this topic has been carried out mainly in Western countries with a focus on legal issues (Brabandt & Mau, 2011; Cohen, 2021; Laube, 2019; Meloni, 2009; Sanchez, 2019). In a paradoxical situation, the following conclusion of Western scientists can be noted: “By privileging tourists and other travelers from wealthy, particularly Western, countries, while excluding those from poor ones as undesirable visitors, those control and surveillance mechanisms exacerbate global inequalities in travel opportunities, even as they encourage the invention of new methods of subversion of mobility regimes” (Cohen, 2021).

Among the developing countries in Asia, Turkey has chosen to implement a liberal visa policy for the past fifteen years in order to increase the number of travellers and thus support tourism. An article on the impact of this unique experience on tourism (Kuzey, Karaman, & Akman, 2019) found that visas are critical to the flow of tourists, that it is much easier to change visa regimes than other policy approaches to support tourism, and that such policies produces visible results for those who have adopted visa-free regimes. Competition in tourism, especially among the countries of Central Asia, is increasing every year, and although most of the countries in the region will soon adopt a visa-free policy, there are no relevant studies from which to draw policy recommendations. Therefore, the proposed study is relevant to a certain extent throughout Central Asia.

Although the visa-free policy for foreign tourists was adopted in Kyrgyzstan 11 years ago, the effectiveness of this policy has not been systematically studied. Only one study compared the growth rates of the number of tourists from the 15 richest countries with visa-free access based on the country's National Statistical Committee statistics for 2011-2019 (Turdumambetov & Taalaibek Kyzy, 2022). Unlike the study mentioned above, the main purpose of this article is to empirically evaluate and study the visa-free policy in Kyrgyzstan through a survey of people working in the tourism sector. It is of scientific interest to compare the results of the aforementioned official data-based statistical study with the results of the surveys of the proposed study. In addition, this article can contribute to the scientific literature about Kyrgyzstan tourism in the English language, which is practically non-existent.

Since 2012, in order to develop tourism and attract investment, the Government of the Kyrgyz Republic has allowed citizens of the top 45 countries with an annual income of at least \$7.000 to enter and travel to Kyrgyzstan without a visa, and the number of these countries is growing every year (MFA, 2019). However, it is clear that there is debate among experts and politicians about whether this policy achieves its goals or not. For example, some business experts evaluate the visa-free regime as almost a “panacea” for tourism problems, and some specialist scientists say that a visa-free regime by itself cannot solve problems (Turdumambetov, 2014). In addition, due to various terrorist attacks in the world, in 2015 the Kyrgyz government requested a review of the appropriateness of this law, considering that the visa-free regime policy would negatively affect the country's security. At that time, exactly three years had passed since the introduction of the visa-free regime, and it was assumed that there had been no positive effect. According to the statistics of that time, in 2010, 5.149 people from 45 countries for whom visa-free regime had been adopted came to Kyrgyzstan, in 2011, 7.848 visitors came from visa-free countries, in 2012, 13.073 people with this status came, in 2013, 9.431 people with this status visited, in 2014 the number of visitors from visa-free countries was 10.258, and in 2015 the visa-free visitors amounted to 10.917 people. The State Tax Service collected 74.5 million soms from the tourism sector in 2009, 92 million soms in 2010, 196 million soms in 2011, 96 million soms in 2012, 98 million soms in 2013, 97 million soms in 2014, and 88 million soms in 2015. The Ministry of Foreign Affairs emphasized thus emphasized that there had been no increase in tourist trips, and tax payments remained at almost the same level (Tynaeva, 2015).

## 2. RESEARCH METHOD

In this study, a quantitative research method was chosen to analyse the opinions of people working in the tourism industry about the visa-free policy adopted in Kyrgyzstan. Quantitative research methods

have been widely used in tourism research worldwide, and more recently in tourism policy reviews, especially in Asian destinations (Rezaei, 2019). While quantitative research in tourism and hospitality is characterised by the increasing complexity of the methods used as time passes (Provenzano & Baggio, 2020), the traditional research method of questionnaire survey, which is widely used in collecting baseline data in tourism research, has not lost its relevance.

### **2.1 Data collection tool**

The study was conducted using a specially created questionnaire to collect data. At the beginning of the questionnaire, a brief instruction explaining the purpose of the study was given. The questionnaire consists of 2 parts and contains a total of 18 questions. The first part of the questionnaire determines the demographic status of the participants (gender, age, marital status, education level, citizenship) and their attitude towards tourism (tourism experience, segment, etc.). In the second part of the questionnaire, nine questions were asked on which a five-point Likert scale was used to determine respondent opinions on visa-free travel. The answers were rated as 1 = strongly disagree, 2 = disagree, 3 = undecided, 4 = agree, and 5 = strongly agree. A brief explanation of the answers was included in the questionnaire. The questionnaire was first prepared in Russian and then translated into English. In order not to lose the meaning of the questionnaire in English, the translated questionnaire was checked by an editor whose native language is English. For the convenience of respondents, the questionnaires were prepared as a Google form and distributed to groups of people working in the tourism sector and in social networks, as well as sent out by personal letters and emails to such individuals. Three hundred and twelve (312) questionnaires were collected using these methods. The remaining 78 questionnaires were distributed and collected at a training session organised for those working in the tourism sector after obtaining the consent of the survey participants. The collected questionnaires were analysed by cross tabulation using a statistical software specifically designed for social sciences. In addition, the validity of the survey was checked using Cronbach's Alpha coefficient.

### **2.2. Cronbach's Alpha reliability test**

Cronbach's Alpha is a statistical measure used to assess the internal consistency or reliability of a psychometric test or questionnaire (Cronbach, 1951). It was developed by Lee Cronbach in 1951 and is widely used in psychology and other social sciences. Cronbach's Alpha is calculated by estimating the average correlation between all possible combinations of an administered questionnaire or test. It ranges from 0 to 1, with higher values indicating greater internal consistency. The formula for calculating Cronbach's alpha is as follows:

$$\alpha = (k / (k - 1)) * (1 - (\text{sum of variances for individual items}) / (\text{total variance in points})).$$

In this formula, k represents the number of items in the test or questionnaire.

Cronbach's Alpha can be interpreted as follows: if the value is close to 1, it indicates that the test items are closely related to each other, indicating high internal consistency. If the value is close to 0, it indicates that the test items are not closely related, indicating low internal consistency (Cronbach & Shavelson, 2004).

According to Akgül & Çevik (2003), if the data is between 0.60-0.80, it is reliable and if it is between 0.80-1.00, it is highly reliable. Altunışık et al. (2010) state that, in some studies, a value as low as 0.50 is acceptable.

In this study, the data of 387 people working in the tourism industry were tested using the Cronbach's Alpha test with a result of 0.605. This result confirms the reliability of the data.

### **2.3. Cross-tabulation**

A cross-tabulation or correlation table is a statistical analysis technique used to analyse the relationship between two or more categorical variables. In this method, a special table is created in which one variable is listed by row and the other by column, with the cells of the table showing the frequency or proportion of cases falling into each combination of categories. Cross tables can be used to identify patterns, trends and relationships between categorical variables. It is commonly used in social sciences,

market research and business analytics to analyse survey data, customer behaviour and other data that includes categorical variables (Kent State University, 2023).

### 3. FINDINGS

This section will provide an overview of some of the key findings from the cross-tabulation analyses. Demographic data were summarized as follows:

- It was found that the majority of respondents are women (51.7%);
- The largest number of respondents were 18-30 years old (43.7%), followed by 31-40 years old (30.5%); the lowest number of respondents were 61 years and older (5.4%);
- When analysed by marital status, it was found that approximately every second respondent was married (56.6%);
- In terms of education, more than half of the respondents have a bachelor's degree (53.2%);
- Approximately one in four respondents has a Master's degree (24.0%);
- The majority of respondents had 1-4 years of experience in tourism (42.9%);
- In terms of citizenship, 83.7% of respondents are citizens of Kyrgyzstan, 10.0% are citizens of European countries, and the rest are citizens of the United States, Canada, and Japan;
- Approximately every third respondent (34.6%) was an employee of a private enterprise;
- About half of the respondents were from the travel industry (46.5%), 17.8% from the accommodation industry, and the smallest fraction were from the transport industry (5.7%).

As mentioned above, in the second part of the questionnaire, nine questions were asked and a five-point Likert scale was used to determine respondent opinions about the visa-free regime. Due to objective limitations, this article analyses the answers to only one of the nine questions, that which we consider the most important. The main results for the remaining questions are presented in the form of a summary at the end of the article.

In the tables, responses are abbreviated and presented in the following degrees: SD = Strongly Disagree, D = Disagree, U = Undecided, A = Agree, SA = Strongly Agree. The collected responses were analysed using cross tabulation analysis. The results of this question are grouped into three tables. In the first table, the respondents' answers to the question were sorted by gender, education and age, in the second table by occupation, tourism connections and experience in the tourism industry, and in the third table by segment of the tourism sector and nationality.

Table 1 shows respondents' selections on the Likert scale in response to the most important question, the statement that "Visa-free regime contributes to the increase in the number of tourists from target countries". There were 200 women (51.7%) and 187 (48.7%) men participating in the study. 61.5% of women and 58.8% of men think strongly agree. When evaluated according to education level; 50.0% of those with "lower secondary" education (n:2), 52.5% of those with "secondary" education (n:40), "Prof. 61.9% of those with "Lyceum/College" (n:21), 60.7% of those with "Bachelor" (n:206), 60.2% of those with "Master's degree" (n:93), and those with "PhD" (n:25) It was determined that 68.0% of them strongly agree. When evaluated according to age; 53.3% of those aged 18-30 (n:169), 67.8% of those aged between 31-40 (n:118), 59.3% of those aged 41-50 (n:59), 51- It was determined that 75.0% of those aged between 60 (n:20) and 60.2% of those aged between 61 and over (n:21) strongly agree (Table 1).

**Table 1.** *The visa-free regime contributes to an increase in the number of tourists from targeted countries (broken down by gender, education and age of respondents, %)*

		SD	D	U	A	SA
<b>Total</b>						
<b>Gender (<math>\chi^2 = 13.888</math>, <math>df = 4</math>, <math>p = .008</math>)</b>						
Male	187	5.9	9.6	5.9	19.8	58.8
Female	200	3.0	2.0	7.0	26.5	61.5
<b>Education (<math>\chi^2 = 31.723</math> <math>df = 20</math>, <math>p = .046</math>)</b>						
Lower secondary	2	0.0	0.0	0.0	50.0	50.0
Secondary	40	5.0	20.0	12.5	10.0	52.5
Prof. Lyceum / College	21	9.5	9.5	9.5	9.5	61.9
Bachelor	206	4.9	2.9	5.8	25.7	60.7
Master's degree	93	3.2	4.3	5.4	26.9	60.2
PhD	25	0.0	8.0	4.0	20.0	68.0
<b>Age (<math>\chi^2 = 14.828</math> <math>df = 16</math>, <math>p = .537</math>)</b>						
18-30	169	5.3	6.5	7.7	27.2	53.3
31-40	118	2.5	5.1	5.9	18.6	67.8
41-50	59	8.5	5.1	6.8	20.3	59.3
51-60	20	0.0	0.0	0.0	25.0	75.0
61 and over	21	4.4	5.7	6.5	23.3	60.2

**Note:** (SD-strongly disagree, D- disagree, U-undecided, A-agree, SA-strongly agree)

When sorting the respondents by education, there were only 2 people with lower secondary education, of which 50.0% responded that they agreed and the remaining 50.0% responded that they strongly agreed. There were 40 people with secondary education, of whom 52.5% said they strongly agreed, 5.0% said they strongly disagreed, 20.0% disagreed, 12.5% were undecided, and 10.0% agreed. Among the 21 participants with a professional lyceum / college degree, 61.9% strongly agreed, 9.5% agreed, 9.5% were undecided, 9.5% disagreed, and the remaining 9.5% strongly disagreed. Among the 206 participants with a bachelor's degree, 60.7% strongly agreed, 25.7% agreed, 5.8% were undecided, 2.9% disagreed, and 4.9% strongly disagreed. Ninety-three participants had a master's degree, of whom 60.2% strongly agreed, 26.9% agreed, 5.4% were undecided, 4.3% disagreed, and 3.2% strongly disagreed. There were 25 participants with a PhD degree, of whom 68% responded that they strongly agreed, 20.0% agreed, 4.0% were undecided, and the remaining 8.0% strongly disagreed.

In terms of distribution by age of respondents, 53.3% of those 18-30 years old responded that they strongly agreed, 27.2% agreed, 7.7% were undecided, 6.5% disagreed and 5.3% strongly disagreed. Sixty-seven-point-eight percent (67.8%) of those aged 31-40 strongly agreed, 18.6% agreed, 5.9% were undecided, 5.1% disagreed, and 2.5% strongly disagreed. Among 41-50 year-olds, 59.3% strongly agreed, 20.3% agreed, 6.8% were undecided, 5.1% disagreed, and 8.5% strongly disagreed. Among 51-60 year-olds 75% strongly agreed and 25% agreed. For those aged 61 and over, 60.2% responded that they strongly agreed, 23.3% agreed, 6.5% were undecided, 5.7% disagreed, and 4.4% strongly disagreed.

**Table 2.** *The visa-free regime contributes to an increase in the number of tourists from targeted countries (sorted by respondents' occupation, relation to tourism, and experience in the tourism industry, %)*

	Total quantity	SD	D	U	A	SA
<b>Occupation (<math>\chi^2 = 32.648</math>, <math>df = 36</math>, <math>p = .629</math>)</b>						
Tour manager	33	3.0	0.0	6.1	30.3	60.6
Guide	42	2.4	9.5	4.8	16.7	66.7
Teacher/Scientist	55	5.5	7.3	5.5	14.5	67.3
Manager	51	5.9	2.0	5.9	27.5	58.8
State employee	15	6.7	0.0	13.3	33.3	46.7
Student	17	11.8	11.8	0.0	47.1	29.4
Economist	30	6.7	6.7	6.7	23.3	56.7
Lawyer	15	0.0	6.7	0.0	26.7	66.7
Marketer	10	0.0	20.0	10.0	20.0	50.0
Other	119	3.4	5.0	8.4	21.0	62.2
<b>Relation to tourism (<math>\chi^2 = 24.084</math>, <math>df = 16</math>, <math>p = .088</math>)</b>						
State employee	29	6.9	13.8	6.9	27.6	44.8
Individual entrepreneur	119	2.5	1.7	5.0	19.3	71.4
Worker in a private	134	4.5	8.2	6.0	25.4	56.0
Teacher/Scientist	42	7.1	7.1	14.3	14.3	57.1
Other	63	4.8	3.2	4.8	30.2	57.1
<b>Experience in tourism (<math>\chi^2 = 13.067</math>, <math>df = 8</math>, <math>p = .110</math>)</b>						
1-4 years	166	5.4	4.8	10.2	26.5	53.0
5-10 years	116	4.3	7.8	2.6	21.6	62.8
11 years and more	105	2.9	4.8	4.8	20.0	67.6

**Note:** (SD-strongly disagree, D- disagree, U-undecided, A-agree, SA-strongly agree)

As shown in Table 2 above, when sorting the respondents' answers to the stated opinion based upon their profession, 60.6% of tour managers strongly agreed, 30.3% agreed, 6.1% were undecided and 3.0% strongly disagreed. Among tour guides, 66.7% responded that they strongly agreed, 16.7% agreed, 4.8% were undecided, 9.5% disagreed, and 2.4% strongly disagreed. Among teachers/researchers, 60.2% strongly agreed, 14.5% agreed, 14.5% agreed, 5.5% were undecided, 7.3% disagreed, and 5.5% totally disagreed. As for managers, 58.7 % strongly agreed, 27.5 % agreed, 5.9 % were undecided, 2.0 % disagreed, and 5.9 % totally disagreed. On the other hand, 46.7 % of state employee strongly agreed, 33.3% agreed, 13.3% were undecided, and 6.7% totally disagreed. Among students, 29.4 % strongly agreed, 47.1% agreed, 11.8% disagreed, and the remaining 11.8% completely disagreed. As for economists, 56.7% said they strongly agreed, 23.3% agreed, 6.7% were undecided, 6.7% disagreed and 6.7% strongly disagreed. Sixty-six-point-seven percent (66.7%) of lawyers strongly agreed, 26.7% agreed, and 6.7% disagreed. Marketers responded that 50.0% strongly agreed, 20.0% agreed, 10.0% were undecided, and the remaining 20.0% disagreed. Of those from other fields not mentioned above, 62.2% strongly agreed, 21.0% agreed, 8.4% were undecided, 5.0% disagreed, and 3.4% strongly disagreed.

Now let us analyse this question based on the respondents' relation to tourism. Forty-four-point-eight percent (44.8%) of those working in the field of public services strongly agreed, 27.6% agreed, 6.9% are undecided, 13.8% disagreed, and 6.9% strongly disagreed. Accordingly, 71.4% of private entrepreneurs responded that they strongly agreed, 19.3% agreed, 5.0% were undecided, 1.7% disagreed, and 2.5% strongly disagreed. Looking at the responses from those working in private

enterprises, 56.0% of the 134 people strongly agreed, and 25.4% agreed, 6.0% were undecided, 8.2% disagreed, and 4.5% strongly disagreed. A total of 42 people from the education sector participated in the survey, of which 57.1% strongly agreed, 14.3% agreed, 14.3% were undecided, 7.1% disagreed, and 7.1% strongly disagreed. Sixty-three (63) people from other sectors participated, of whom 57.1% strongly agreed, 30.2% agreed, 4.8% were undecided, 3.2% disagreed and 4.8% strongly disagreed.

Based on the respondents' experiences in the tourism industry, the responses yielded the following results. Fifty-three percent (53.0%) of the 166 people with experience of 1-4 years strongly agreed, 26.5% agreed, 10.2% were undecided, 4.8% disagreed, and 5.4% strongly disagreed. Of the 116 people with experience of 5-10 years, 62.8% strongly agreed, 21.6% agreed, 2.6% were undecided, 7.8% disagreed, and 4.3% strongly disagreed. Sixty-seven-point-six percent (67.6%) of the 105 people with 11 years of experience and above said they strongly agreed, 20.0% agreed, 4.8% were undecided, 4.8% disagreed, and 2.9% strongly disagreed.

In terms of segment of the tourism industry (Table 3), 180 people participated from the field of tourism organisation, of which 65.0% strongly agreed, 20.0% agreed, 6.1% were undecided, 5.0% disagreed, and 3.9% strongly disagreed. Sixty-nine (69) people from accommodation facilities participated, 66.7% strongly agreed, 24.6% agreed, 1.4% were undecided, 1.4% disagreed, and 5.8% strongly disagreed. Thirty people from catering companies participated, 46.7% strongly agreed, 30.0% agreed, 6.7% were undecided, 6.7% disagreed, and 10.0% strongly disagree. Among the 23 people from transport companies who participated, 30.4% strongly agreed, 30.4% agreed, 21.7% were undecided, 13.0% disagreed, and 3.3% strongly disagreed, of the 30 people from the education sector who participated, 56.7% strongly agreed, 20.0% agreed, 6.7% were undecided, 13.3% disagreed, and 3.3% strongly disagreed. Finally, among the 55 people from other tourism industries sectors who participated, 58.2% strongly agreed, 27.3% agreed, 7.3% were undecided, 5.5% disagreed, and 1.8% strongly disagreed.

**Table 3.** *The visa-free regime contributes to an increase in the number of tourists from targeted countries (sorting of respondents by work segment and citizenship, %)*

		SD	D	U	A	SA
<b>Total</b>	<b>quantity</b>					
<b>Segment of the travel industry (<math>\chi^2 = 30.272</math>, <math>df = 20</math>, <math>p = .066</math>)</b>						
Organization of tours	180	3.9	5.0	6.1	20.0	65.0
Accommodation facility	69	5.8	1.4	1.4	24.6	66.7
Catering services	30	10.0	6.7	6.7	30.0	46.7
Transport services	23	4.3	13.0	21.7	30.4	30.4
Education	30	3.3	13.3	6.7	20.0	56.7
Other	55	1.8	5.5	7.3	27.3	58.2
<b>Citizenship (<math>\chi^2 = 17.778</math>, <math>df = 24</math>, <math>p = .804</math>)</b>						
Kyrgyzstan	324	4.9	6.5	6.8	25.0	56.8
Turkey	5	0.0	0.0	0.0	20.0	80.0
USA	12	0.0	8.3	8.3	0.0	83.3
United Kingdom	5	0.0	0.0	0.0	40.0	60.0
Canada	7	0.0	0.0	14.3	14.3	71.4
France	6	0.0	0.0	0.0	0.0	100.0
Other (Japan, Germany, Belgium, etc.)	28	3.6	0.0	3.6	17.9	75.0

**Note:** (SD-strongly disagree, D- disagree, U-undecided, A-agree, SA-strongly agree)

When sorted by citizenship: 324 people from Kyrgyzstan participated, of which 56.8% strongly agreed, 25.0% agreed, 6.8% were undecided, 6.5% disagreed, and 4.9% strongly disagreed; 5 people from Turkey participated and 80.0% of them strongly agreed while 20.0% agreed; 12 people from the USA participated, 83.3% strongly agreed, 8.3% were undecided, and 8.3% disagreed; 5 people from UK participated, 60.0% of whom strongly agreed while 40.0% agreed; 7 people from Canada participated,

among whom 71.4% strongly agreed, 14.3% agreed and the remaining 14.3% were undecided. There were 6 participants from France, all of whom said they strongly agreed. Of the 28 participants from other countries, 75% said they strongly agreed, 17.9% agreed, 3.6% were undecided, and 3.6% strongly disagreed.

#### 4. CONCLUSION AND DISCUSSION

As noted above, although the visa-free policy was adopted in Kyrgyzstan 11 years ago, there is a lack of research on its effectiveness and there are various disputes in the tourism community of the country. Opinions about the visa-free policy were collected from workers directly involved in the creation of products in the tourism sector of Kyrgyzstan (entrepreneurs, managers, guides, craftsmen, museum workers) and those involved indirectly (employees of relevant government agencies and academics specialising in tourism) and analysed in a single survey. The data collected was tested using descriptive analysis and cross-tabulated analysis. Descriptive analysis was used to analyse responses based upon the demographic data of the respondents (gender, age, education level, marital status, work experience in tourism, segment in tourism, etc.).

It should be noted that, due to the participation in the survey of owners and employees of a number of foreign tour operators who have worked on tourism development projects in Kyrgyzstan and offer Kyrgyzstan as a tourist destination to the market, questions on citizenship were also used in the analysis.

The main findings from the crosstab analyses were as follows:

- 60.2% of the respondents answered strongly agree to the statement "Visa-free regime contributes to the growth of the number of tourists from the target countries";
- 55.0% of the respondents answered that they fully agreed with the statement that "Visa-free travel contributes to increased tourism revenues due to increased tourism spending in the country";
- 30.7% of respondents said they were undecided, 25.1% agreed, and 23.3% strongly agreed to the statement that "Visa-free travel helps to increase the number of wealthy tourists from targeted countries";
- 46.0% of the respondents fully agreed with the question "The visa-free regime contributes to an increase in the number of budget tourists or so-called backpackers from targeted countries";
- To the question "The visa-free regime threatens the country's security", only 22.5% of respondents answered that they strongly disagreed, 20.9% disagreed, and 26.9% of participants were undecided;
- In response to the statement that "A visa-free regime cannot be effective without appropriate work on destination management and marketing" 34.9% of respondents said they strongly agreed;
- To the question "The abolition of the visa-free regime will spoil diplomatic relations with other countries" 34.6% of respondents said they were undecided, only 19.4% were strongly opposed;
- The majority of respondents agreed with the statement "The visa-free regime will facilitate the flow of investments based on the principle 'Today a tourist, tomorrow an investor'." (38.0% strongly agree, 31.3% agree);
- More than half of respondents strongly agreed (62.5%) with the statement "The convenience of visa-free travel is a factor in tourists' choice of destination country".

Previously, the only study on the effectiveness of the visa-free regime in Kyrgyzstan analysed statistics on tourist arrivals and found that the expected positive effect of the adopted visa-free policy on tourism was virtually non-existent, stressing that the number of tourists increased only through natural increase (Turdumambetov & Taalaibek kyzy, 2022). It is noted that the results of the study based on the above survey of tourism workers do not coincide with the findings of the above-mentioned statistical analysis. Therefore, the expectations of tourism workers from the visa-free policy are still very high. This is probably the result of the process of rapid adoption of the visa-free policy, which, at the time, was presented as a "panacea" for the industry. In order to improve the socio-economic efficiency of the tourism sector, and thus to contribute to the inflow of foreign currency and job creation in the regions,



linking to the growth of other sectors of the economy, it is necessary to find an approach which creates a holistic, integrated system to address the problems.

### **Ethical Statement**

Scientific, ethics and citation rules were followed in the process of preparing the study "OPINIONS OF THE KYRGYZSTAN TOURISM SECTOR ON THE VISA FREE REGIME". There was no falsification of the collected data, and this study was not presented in other scientific publications.

### **Report on the percentage contribution of researchers**

The researchers' contributions to this work are equal.

### **Conflict statement**

There are no potential conflicts of interest in the study.

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