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Studējošo zinātniski pētniecisko rakstu krājumā ir iekļauti Ekonomikas un kultūras augstskolas (EKA) un Alberta koledžas (AK) studējošo un absolventu valsts pārbaudījuma darbu fragmenti un studējošo zinātniskie raksti, kas tika iesniegti uz **Studentu starptautisko zinātniski praktisko konferenci „Studējošo pētnieciskā darbība: teorija un prakse'2020"**.

Sējumā ir iekļauti raksti, kuros ir atspoguļoti veikto pētījumu rezultāti vadības zinību jomā.

Izdevējs:

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Lomonosova 1/5, Rīga, LV1019, Latvija

SATURS

Kristīne, Berezņeviča[1], Linda Kalace[2]. SABIEDRISKĀS ĒDINĀŠANAS NOZARES UZŅĒMUMU KONKURĒTSPĒJAS NOVĒRTĒŠANA TEIKĀ

[1]*Ekonomikas un Kultūras augstskola, Vadības zinības, kristineberez@inbox.lv*

[2]*Ekonomikas un Kultūras augstskola, Vadības zinības, lindakalace@inbox.lv*

Zinātniskais vadītājs: Dr.oec., profesore Vita Zariņa

Anotācija

Pētījuma aktualitāte: Ēdināšanas nozare ir viena no lielākajām pakalpojumu nozarēm Latvijā, nozares biznesa portāla HoReCa apkopotie dati liecina, ka 2018.gadā tās apgrozījums bijis ap 487 milj.eiro un tajā darbojās 2,5% no visiem Latvijas uzņēmumiem, tajā pašā laikā uzņēmumu skaits sarūk – 2017. gadā Latvijā tika reģistrēti 5636 uzņēmumi, taču 2019.gada sākumā to skaits bijis 4591. ("Ēdināšanas nozares attīstība un fakti", 2019). Sabiedriskās ēdināšanas nozare šobrīd ir krustugunīs – veiksmīgi darbojas lielie uzņēmumi, kuru darbība ir izvērsta jau daudzus gadus, tiem ir izveidotas uzņēmumu ķēdes un pārdomāta lojalitātes programma. Augstais pieprasījuma līmenis ēdināšanas nozarē liecina par jaunu uzņēmumu nepieciešamību. Mūsdienās tirgus paplašināšanai izmantojamas cilvēku neierobežotās iespējas, inovatīvā domāšana, ceļojumi, pieredzes apmaiņa, kā arī darbs ārzemēs, tas viss sekmē jaunu ideju ieviešanu Latvijas tirgū, kā arī stimulē uzņēmējus rīkoties.

Pētījuma mērķis: Novērtēt sabiedriskās ēdināšanas nozares uzņēmumu konkurētspēju Teikā.

Pētījuma metodes: Datu ieguvei: literatūras analīze un anketēšana, Datu apstrādei: grafiskā metode, aprakstošās statistikas analīze, sekundāro datu analīze.

Sasniegtie rezultāti: Teorētiskās analīzes rezultātā tika izvirzīti vairāki konkurētspējas ietekmes faktori, jeb kritēriji. Pētījuma rezultātā, izmantojot tos, iegūtie dati sarindo Teikā darbojošos uzņēmumus konkurētspējas reitingā, kas liecina par katra uzņēmuma tirgus daļu teritorijā. Izpētot atsevišķos pētījuma kritērijus, tika izvērtētas ssbiedriskās ēdināšanas uzņēmumu stiprās un vājās puses, kā arī izstrādāti priekšlikumi to konkurētspējas paaugstināšanai .

Atslēgas vārdi: Sabiedriskā ēdināšana; konkurētspēja; konkurētspējas indekss; uzņēmumi darbojošies ķēdē.

Ievads

Restorāni, kafejnīcas, mobilie ēdināšanas uzņēmumi atrodami ik uz soļa. Sabiedriskās ēdināšanas nozare ir viena no lielākajām pakalpojumu nozarēm Latvijā, nozares biznesa portāla HoReCa apkopotie dati liecina, ka 2018.gadā tās apgrozījums bijis ap 487 milj.eiro un tajā darbojās 2,5% no visiem Latvijas uzņēmumiem, tajā pašā laikā uzņēmumu skaits sarūk – 2017. gadā Latvijā tika reģistrēti 5636 uzņēmumi, taču 2019.gada sākumā to skaits bijis 4591. Pie uzņēmumu slēgšanas iemesliem pārstāvji pieskaita augstu konkurenci uzņēmēju vidū, kā arī galveno iemeslu - nepanesamo nodokļu slogu, 2018.gadā gandrīz pusei – 47,3% uzņēmumu bija nodokļu parāds, kas pārsniedza 150 eiro. ("Ēdināšanas nozares attīstība un fakti" 2019).

Sabiedriskās ēdināšanas nozare šobrīd ir krustugunīs – veiksmīgi darbojas lielie uzņēmumi, kuru darbība ir izvērsta jau daudzus gadus, tiem ir izveidotas uzņēmumu ķēdes un pārdomāta lojalitātes programma. Lielie uzņēmumi ir izvērsušies visā tirgus platībā savā starpā sadalot vietu tajā, tas traucē jaunajiem uzņēmējiem ieiet tirgū, kā arī tajā stabilizēties, tajā pašā laikā augstais pieprasījuma līmenis ēdināšanas nozarē liecina par jaunu uzņēmumu nepieciešamību. Mūsdienās tirgus paplašināšanai izmantojamas cilvēku neierobežotās iespējas, inovatīvā domāšana, ceļojumi, pieredzes apmaiņa, kā arī darbs ārzemēs sekmē jaunu ideju ieviešanu Latvijas tirgū, kā arī stimulē uzņēmējus rīkoties.

Lursoft datu bāzes dati liecina, ka 55, 38 % sabiedriskās ēdināšanas uzņēmumu ir reģistrēti Rīgā, tas pierāda, ka šajā teritorijā ir vislielākais pieprasījums. Daudzi sabiedriskās ēdināšanas uzņēmumi ir paredzēti tūristiem, tie arī norobežojas konkrētā apkaimē – Vecrīgā, vai ap to, taču uzņēmumi, kuri vēlas specializēties uz vietējo iedzīvotāju apkalpošanu ir izvietoti mikrorajonos. Viens no attīstītākajiem bija un ir – Teika. Šis rajons šobrīd izceļas ar savām inovācijām, savādāku skatu uz darba procesiem, izklaidi, kā arī uzņēmējdarbību.

Pētījuma mērķis ir novērtēt sabiedriskās ēdināšanas nozares uzņēmuma konkurētspēju Teikā.

Lai sasniegtu pētījuma mērķi tiek izvirzīti sekojoši uzdevumi:

1. Izpētīt konkurētspējas būtību no teorētiskās puses
2. Izstrādāt pētījuma metodoloģiju un veikt sabiedriskās ēdināšanas nozares uzņēmumu konkurētspējas novērtēšanu Teikā.
3. Izstrādāt secinājumus par sabiedriskās ēdināšanas nozares uzņēmumu konkurētspējas novērtējumu Teikā, kā arī izvirzīt priekšlikumus tās paaugstināšanai.

Pētījuma hipotēze: Sabiedriskās ēdināšanas nozarē konkurētspējīgākie ir ķēdē darbojošies uzņēmumi, salīdzinot ar tiem uzņēmumi, kuru darbība ir patstāvīga.

Pētījuma ietvaros datu ieguvei izmantotās metodes ir literatūras analīze un anketēšana, savukārt datu apstrādei izmantotās metodes ir grafiskā metode, aprakstošās statistikas analīze, kā arī sekundāro datu analīze.

Analītiskais apskats

Uzņēmumu konkurētspēja ir ārkārtīgi aktuāls jautājums pasaulē, vairums zinātnieku to pēta, par to runā un raksta. Profesors J. Ē. Niedrītis ir definējis konkurētspēju: „Konkurētspēja (competitivness) ir salīdzinošs konkrētās preces/pakalpojuma patēriņa un cenas parametru raksturlielums attiecībā pret analoģisku preci/pakalpojumu.“ (Niedrītis, 2008, 18. lpp.) Konkurētspēja ir spēja konkurēt, būt pievilcīgākam, izdevīgākam, labākam uz savu konkurentu fona. Tā ir nepārtraukta preču/pakalpojumu salīdzināšana un analizēšana. Šīs analīzes pamatā ir klientu gan funkcionālie, gan emocionālie vērtējumi, tādēļ uzņēmējiem ir jārūpējās par preces/pakalpojuma kvalitātes, cenas, funkcionalitātes, izskata/noformējuma, servisa, kā arī citu kritēriju, ar kuriem sastopas klients izmantojot preci/pakalpojumu, attiecīgu līmeni.

Uzņēmuma konkurētspēja ir viens no uzņēmējdarbības ietekmējošajiem rādītājiem. Lai uzņēmums būtu konkurētspējīgs, tam ir skaidri jāzin savi darbības mērķi. Jāspēj konstatēt savas merķauditorijas vēlmes un vajadzības kā arī nodrošināt to apmierināšanu. Konkurētspējīgāks būs tieši tas uzņēmums, kurš darbosies visciešākā saskaņā ar izvirzītajiem uzdevumiem, kā arī spēs pieņemt pārmaiņas un turpinās attīstīties - virzīsies uz priekšu. „Bez pieprasījuma nav konkurētspējas, nav uzņēmējdarbības. Pieprasījuma pamatā ir sadarbība, laba komunikācija ar klientu un klientu lojalitāte.“ (Niedrītis, 2008, 11. lpp.) Uzņēmējdarbība ir nepārtraukta sadarbība starp uzņēmumu un klientu, Uzņēmums veido piedāvājumu, savukārt klients pieprasījumu, ja kāda no šīm pusēm nav, nepastāvēs arī uzņēmums. Konkurētspējīgam uzņēmumam nepieciešams noturēt savus klientus, kā arī spēt ieinteresēt konkurentu klientus, tiem piedāvājot vislabāko tieši tad, kad viņiem tas ir nepieciešams, kā arī panākt ka šie klienti ir lojāli konkrētam produktam un uzņēmumam.

Konkurētspēja ir raksturlielums, kurš nemitīgi mainās, tas nav pastāvīgs, tas prasa daudz uzmanības un pūļu. „Konkurētspēja ir relatīvs jēdziens. Produkts, kas ir konkurētspējīgs vienā tirgū, var tāds nebūt citā tirgū. Arī vienā un tajā pašā tirgū produkts reizumis ir konkurētspējīgs tikai noteiktā laika periodā.“ (Niedrītis, 2008, 19. lpp.) Konkurētspējas novērtēšana un tās palielināšanas iespēju izvērtēšana ir viens no uzņēmēju galvenajiem darba uzdevumiem. Katrs uzņēmums tiek veidots, lai kļūtu par līderi, lai ieņemt pēc iespējas lielāku tirgus daļu, taču vai tas izdosies, vai tas piepildīsies sekmīgi ir tieši atkarīgs no iespējām, attieksmes un atdeves. Lai ilgstoši nodrošinātu līdera pozīcijas nozarē nepieciešams risināt stratēģiskos uzdevumus –

jāapsteidz konkurenti dažādos darbības posmos:

- Jaunu preču izstrādāšanā un ieviešanā ražošanā;
- Jaunu tehnoloģiju izmantošanā;
- Jauna dizaina izstrādāšana;
- Ražošanas izmaksu līmeņa pazemināšanās;
- Jaunā cenu politikā;
- Sadales sistēmas pilnveidošanā. (Tirgzinības pamati, 2007, 275.lpp.)

Uzņēmumam jāpanāk, lai tas paliek klientu atmiņā ar pozitīvo vērtējumu, ja uzņēmumam tas izdodas, klients atnāks vēlreiz, klients par to runās, ieteiks citiem, tādā veidā palielinās ieņēmumus, respektīvi arī peļņu. Jo lielāku potenciālo klientu daļu organizācija uzrunās un spēs apmierināt to vajadzības, jo lielāku tirgus daļu uzņēmums spēs ieņemt. Viens uzņēmums vienlacīgi var būt vairāku tirgu sastāvdaļa, tas ir atkarīgs no uzņēmuma darbības veida, taču vienmēr uzņēmumam var noteikt tā galveno nozari, kurā tas mēra savu konkurētspēju.

Konkurētspējas izvērtēšanai pastāv vairums modeļu un metožu, taču to butība ir līdzīga – kritēriju novērtēšana, atšķirības manāmas tikai tajā aspektā – kas novērtē šos kritērijus un kādā līmenī. Uzņēmumu konkurētspēju var vērtēt nozares speciālisti, lai noteiktu situāciju nozarē, kādi uzņēmumi ir spējīgāki, bet kuriem ar to ir grūtības. Pie kritērijiem šādā novērtēšanas līmenī var pieskaitīt:

- Patērētāju skaita pieaugums;
- Tirgus daļas noturīgums un paplašināšanās attiecībā pret konkurentiem;
- Inovāciju aktivizācija;
- Stratēģijas radošums un atbilstība situāciju maiņām;
- Jaunu tehnoloģiju apgūšana.

Konkurētspēju var vērtēt paši uzņēmumu vadītāji, lai konstatētu savas stiprās un vājās puses, iegūstot nepieciešamo informāciju tie veido rīcības plānu turpmākai darbībai. Viņu kritēriji atšķirās no iepriekšējā līmeņa kritērijiem, tie ir precīzāki un rezultatīvāki:

- Izstrādātās stratēģijas optimāla īstenošana;
- Mērķu sasniegšana noteiktajā termiņā;
- Peļņas iegūšana;
- Produktu mazākas izmaksas attiecībā pret konkurentu produktu;
- Produkta vērtība patērētāju skatījumā;
- Produkta cena attiecībā pret konkurentiem un paša produkta izdevumiem;
- Liela darbinieku pieredze
- Ražošanas jaudu pilnvērtīga izmantošana.

Konkurētspējas galvenie vērtētāji, neapšaubāmi, ir klienti, viņi to dara pat neapzinātā līmenī, izvēloties atstāt naudu konkrētajā uzņēmumā, savukārt gūstot atšķirīgu pieredzi dažādos vienas nozares uzņēmumos, tie rīkojas apzināti - izvēlas sev piemērotāko variantu (novērtē uzņēmumu konkurētspēju un izvēlas to, kurš visvairāk atbilst nospraustajiem kritērijiem). Klientu attieksmes kritēriji pret uzņēmumu vai preci/ pakalpojumu galvenokārt ir šādi:

- Ātra reaģēšana uz vajadzībām;
- Izpildes termiņu ievērošana;

- Gatavība konsultēt;
- Augsta apkalpošanas kultūra;
- Pakalpojumu spektra plašums;
- Cenas un kvalitātes pozitīva attiecība. (Forands, 2004, 130. – 132. lpp.)

Lai uzņēmums būtu konkurētspējīgs, tam ir jārīkojas atbilstoši visiem šiem līmeņiem, jo tie ir savstarpēji saistīti. No visiem šiem kritērijiem pozitīvā izpildījumā arī veidojas uzņēmuma reputācija sabiedrībā, kā arī augsta konkurētspēja, kas liecina par veiksmīgu uzņēmējdarbību un lielu apgrozījumu.
"Katrs konkurētspējas kritērijs atsevišķi dod priekšstatu par notiekošajiem procesiem, tomēr tie nerada kopainu. Praksē var izmantot vairāku kritēriju kompleksu, tādējādi iegūstot iespēju noteikt kvantitatīvo rādītāju konkurētspēju indeksu." (Forands, 2004, 131. lpp.) Šī metode ir samērā vienkārša un ērti pielietojama. Nepieciešams izvirzīt līdz 10 kritērijus un izvērtēt visus konkurējošos uzņēmumus pēc tiem 5 baļļu skalā. Katra uzņēmuma kritēriju vērtējumu kopsumma arī veido kopvērtējuma indeksu. Rezultātā var skaidri redzēt, kurš uzņēmums ir konkurētspējīgāks – tas kura konkurētspējas indekss ir vislielākais. Īstenojot šo metodi, var secināt arī par to kāda ir konkurētspējas starpība ar citiem konkurējošajiem uzņēmumiem.

Organizācijas konkurētspējas uzlabošanas pamatā ir darbinieku unikalitāte un vērtība, kuru viņi nes uzņēmumam (Lin, Yu-Ping Wang, Wang & Jaw, 2017). Tieši darbinieki, neatkarīgi no ieņemamajiem amatiem ir tie, kas atšķirās no pārējiem uzņēmumiem. Tas pats ir manāms arī uzņēmumu ķēdei piederošajiem uzņēmumiem, preces un pakalpojumi ir vienlīdzīgi tajos, taču savādāka ir klientu apkalpošana, konsultēšana u. tml. Darbinieku attieksme un uzvedība ir viens no noteicošajiem faktoriem, kas liecina par uzņēmuma sekmīgu darbību. No tā izriet, ka uzņēmuma veiksmes atslēga ir tās darbinieki, respektīvi uzņēmuma vadītājiem ir jāpieliek lielas pūles, lai nodrošinātu darbinieku pozitīvu attieksmi darbā - ir jārūpējas par saviem darbiniekiem tāpat, kā vēlas, lai drarbinieki attiecas pret klientiem. Tas ir nepārtraucams savstarpējs process.

Savukārt profesors Dž. Sakss ir raksturojis konkurētspējas palielināšanas iespējas: „Ekonomika ir konkurētspējīga pasaule, ja valsts politika un ekonomiskie institūti nodrošina stabilu un ātru ekonomikas izaugsmi. Izmantojot valsts atbalstu, uzņēmēji var veikt savu konkurētspēju palielināšanas politiku, pamatā veicot inovācijas." (Forands, 2004, 105. lpp.) Situācija valstī būtiski ietekmē uzņēmumu darbību, uzņēmums to nevar mainīt vienīgi spēj pielāgoties. Kad ārējie ietekmes faktori ir stabili un veiksmīgi vērsti uz uzņēmējdarbību viss kļūst atkarīgs no pašiem uzņēmējiem. Šādos apstākļos uzņēmumiem nedrīkst apstāties, ir jādarbojas inovatīvi - ir jāattīstās, jāizmanto jaunas pieejas, jaunas tehnoloģijas, jāskatās no citiem skatupunktiem.

Pētījuma metodoloģija

Pētījuma gaitā tika izmantota literatūras analīze, tās rezultātā tika definēta konkurētspējas būtība, tās novērtēšanas iespējas, kā arī nosaukti svarīgākie konkurētspējas vērtēšanas kritēriji, kā arī to ietekme uz uzņēmējdarbību. Izmantojot literatūras analīzes datus, tika izveidota pētījuma anketa, kura galvenokārt sastāv no tabulas, (1. tabula). Tabulā respondentiem tiek piedāvāti kritēriji, kuri tiem ir jānovērtē pēc 5 baļļu skalas attiecīgi savai pieredzei ar konkrēto uzņēmumu.

Konkurētspējas novērtēšanai tika izvēlēta klientu anketēšana, respondentiem tiek piedāvāts kritēriju komplekss pēc kura autores nosaka konkurētspējas indeksu. To iegūst saskaitot kritēriju novērtēšanā iegūtos vērtējumus (objektīvākam novērtējumam aprēķina katra uzņēmuma vidējo konkurētspējas indeksu) rezultātā: jo augstāks indekss, jo konkurētspējīgāks uzņēmums. Konkurētspējas noteikšana pēc klientu viedokļa ir objektīvākais veids, jo ja klientam ir neapmierinoši vērtē uzņēmuma darbību, tad viņš tajā neatgriezīsies un nevienam to neieteiks.

1. tabula. Konkurētspējas kritēriju novērtēšanas veidlapa (Avots: autoru apkopojums)

Kritērijs/Balles	1	2	3	4	5
1. Spēja apmierināt vajadzības					
2.Spēja ievērot izpildes termiņus					
3. Sniegt konsultācijas					
4.Augsta apkalpošanas kultūra					
5.Preču/Pakalpojumu daudzveidība un plašums					
6.Uzticamība					
7.Kvalitātei atbilstoša cena					
8.Pieejamība					
9.Uzņēmuma lojalitāte klientam					

Lai identificētu pastāvošo situāciju pētamajā nozarē autores veica aprakstošās statistikas analīzi, kurā salīdzināja pētāmās nozares uzņēmumus atsevišķi, kā arī kopainā. Tāpat arī rezultātu apkopošanai tika izmantota grafiskā analīze, kas ļauj uzskatāmi – diagrammu veidolā – secināt par uzņēmumu konkurētspējas kritēriju novērtējumu.

Pētījuma rezultāti

Pētījuma gaitā autores veica Teikas rajona iedzīvotāju anketēšanu. Anketēšanas mērķis bija uzzināt cilvēku viedokli par konkrētiem sabiedriskās ēdināšanas uzņēmumiem, aicinot novērtēt uzņēmumus, pēc dotajiem kritērijiem (1. tabula) 5 baļļu skalā, kur zemākais vērtējums – 1, bet augstākais - 5, respektīvi zemākais iespējamais konkurētspējas indekss – 9, bet augstākais – 45.

2. tabula. Uzņēmumu vidējā konkurētspējas indeksa atspoguļojums (Avots: autoru apkopojums)

Uzņēmuma Nr.	Uzņēmuma nosaukums	Vidējais konkurētspējas indekss
1.	"Picu Darbnīca"	36,48
2.	"Storano"	36,33
3.	"Raunas Dārzs. Eklērnīca"	34,89
4.	"Kebab factory"	34,69
5.	"Ēlande"	34,28
6.	"Vairāk saules"	34,22
7.	"Ezītis Miglā"	34,20
8.	"Fei Fei Teika"	32,93
9.	"Hartvik"	32,56
10.	"Teikas mākonis"	31,58
11.	"Shangri – La"	30,55
12.	"Oregano"	30,00
13.	"Daily"	29,98

Apkopojot iegūtos datus, autores aprēķināja katra uzņēmuma vidējo konkurētspējas indeksu (2.tabula.). Iegūstot rezultātus manāms, ka viskonkurētspējīgākais uzņēmums, pēc aptaujas datiem ir "Picu darbnīca"– 36,48; tam seko restorāns „Storano" – 36,33, var secināt, ka šie uzņēmumi ir vienlīdz konkurētspējīgi, jo to rezultātu starpība ir vien 0,15, savukārt trešais rezultāts pieder uzņēmumam „Raunas Dārzs. Eklērnīca" – 34,89, kur manāma lielāka atšķirība, salīdzinot ar otro konkurētspejīgāko uzņēmumu – 1,44 punkti.

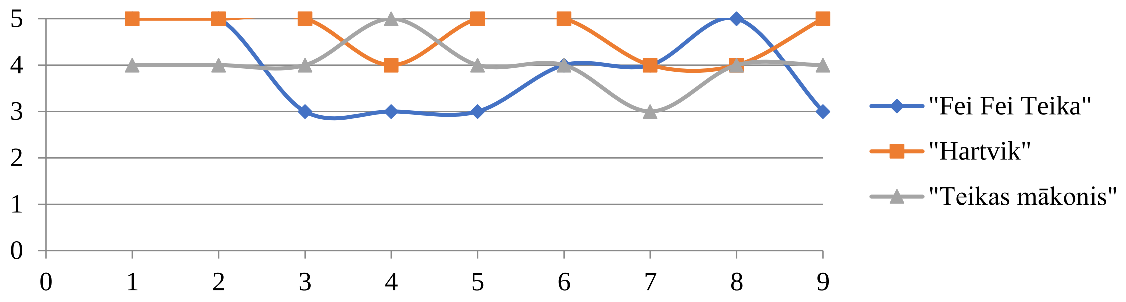
Aprēķina rezultāti mudināja autores sadalīt uzņēmumus pēc iegūtajiem vērtējumiem vairākās grupās:

1. "Picu darbnīca" un "Storano" – ar indeksu 36,
2. "Raunas Dārzs. Eklērnīca"; "Kebab factory"; "Ēlande"; "Vairāk saules" un "Ezītis miglā", kuru indekss sastāda 34 punktus,
3. "Hartvik" un "Fei Fei Teika" ar indeksu 32,
4. "Teikas mākonis", kura konkurētspējas indekss ir 31,58,
5. "Daily"; "Oregano"; "Shangri – La", kuru vidējais konkurētspējas indekss sastāda 30 punktus.

Cēloņi uzņēmu atšķirīgajiem novērtējumiem varbūt visdažādāki, tie var būt gan pastāvīgie uzņēmuma trūkumi, kā arī gadījuma situācijas. Izpētot iegūtos datus var var secināt, ka pirmie 7 uzņēmumi (2. tabula) spēj noturēties tirgū un nodrošināt savu konkurētspēju, katram no tiem palīdz atšķirīgi faktori: uzņēmumiem "Picu Darbnīca"; "Vairāk saules" un "Ezītis miglā" galvenais ietekmējošais faktors ir piederēšana uzņēmumu ķēdei. Tā kalpo par pamatīgu atbalstu atsevišķam uzņēmumam, tāpat tā nodrošina uzņēmuma atpazīstamību, kas liecina par to, ka klienti dodoties uz to jau zin kas tos sagaida. Uzņēmumu ķēdes ietvaros ir nodrošināti apkalpošanas un darbības standarti, kuri notur uzņēmumus pie konkrētas kārtības.

Savukārt uzņēmumam "Storano" standartus nosprauž viņa atrašanās vieta. Restorāns atrodas tirdzniecības centrā, kas ievieš sev nepieciešamās vadlīnijas, lai noturētu uzņēmumu attiecīgā līmenī. Tāpat šim ēdināšanas uzņēmumam palīdz tas, ka tas ir vienīgais veikalu ielokā, kas nozīmē, ka liela daļa pircēju iegriezīsies ieturēt maltīti, tādā veidā nodrošina uzņēmuma apgrozījumu un iespēju sniegt lielāku piedāvājumu, kā arī augstu apkalpošanas kultūru, sadarbojoties ar kvalificētu darba spēku.

"Ēlande" spēj atšķirties no pārējiem uzņēmumiem ar savu pieredzi, tā ir sabiedriskās ēdināšanas nozares sastāvdaļa jau kopš 1994. gada, kas liecina par savu klientu loku, kā arī to, ka cilvēki tur griežas, lai apmierinātu savas konkrētās vajadzības. Klienti zin ko šis uzņēmums piedāvā, kā arī ir 100% pārliecināti ko saņems pretī. Līdzīgi ir ar uzņēmumu "Kebab factory", tā darbības specifika nodrošina uzņēmuma veiksmīgu darbību un tajā pašā laikā – ātri, ērti un par pieņemamu cenu apmierināt klientu vajadzības. Šī uzņēmuma viens no svarīgākajiem faktoriem ir laba reputācija, kas arī virza šo uzņēmumu panākumu virzienā. Savukārt organizācijas "Raunas Dārzs. Eklērnīca" veiksmes atslēga ir unikalitāte un nepārspējamā kvalitāte. Uzņēmums ir panācis, ka cilvēki no dažādiem rajoniem, nebaidoties no attāluma, dodas uz Teiku, lai nobaudītu neatkārtojamos eklērus, kuru klāsts ir parāk plašs, lai spētu izvēlēties.

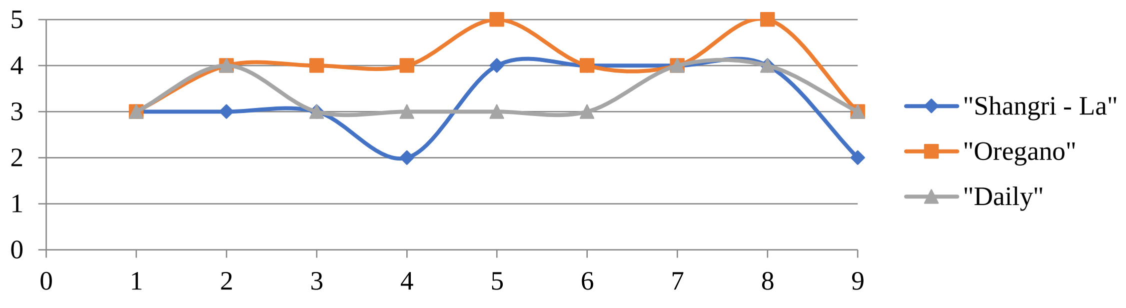


1.att. Uzņēmumu novērtēšanas kritēriju modu atspoguļojums (I) (Avots: autoru apkopojums)

Pētot diagrammu (1.att.) var secināt, ka katram no šiem uzņēmumiem ir savas priekšrocības un trūkumi. Apskatot uzņēmumu „Fei Fei Teika" var secināt, ka cilvēki ir pietiekami apmierināti ar 2., 6., 7., kā arī 8. kritēriju, savukārt grūtības rodas ar 3. – Sniegt konsultācijas un 4. – Augsta apkalpošanas kultūra, kas liecina par darbinieku neprofesionālu darbību, iespējams uzņēmumā nestrādā kvalificēti cilvēkresursi, vai arī esošie nav attiecīgi apmācīti, lai nodrošinātu augstāku servisu, savukārt zemie rādītāji kritērijos 5. – Preču/pakalpojumu daudzveidība un plašums, kā arī 9. – uzņēmuma lojalitāte klientam liecina par uzņēmēju neefektīvo darbību un savu iespēju nepietiekamu izmantošanu.

Ar konditorejas „Hartvik" darbību cilvēki ir vairāk apmierināti, gandrīz visi kritēriji ir augstu novērtēti, taču no spējas konkurēt tos šķir 4. kritērijs – augsta apkalpošanas kultūra, 7. - kvalitātei atbilstoša cena un 8. – pieejamība. Lai nodrošinātu augstu pie apkalpošanas kultūru nepieciešams darbs ar darbiniekiem, kuri atrodas ciešā saskarsmē ar klientiem, taču, lai paaugstinātu vērtējumu, kur apskata cenas un kvalitātes atbilstību, nepieciešams vērst uzmanību uz uzņēmuma iekšējo darbību, iespējams jāizvērtē produktu receptes, pagatavošanas process, izejvielas, vai arī jāpārskata cenu veidošanas elementi. Tāpat jāvērš uzmanība uz uzņēmuma darba laiku, jāizvērtē iespējas paplašināt pakalpojumu klāstu, lai uzņēmums būtu vairāk pieejams un atklāti vērsts uz klientiem.

Uzņēmums „Teikas mākonis" spēj noturēties ne tik augstā, taču stabilā līmenī. Vienīgais kritērijs pie kura uzņēmējam būtu jāpiestradā ir nodrošināt kvalitātei atbilstošu cenu, tas sekmēs lielāku apmeklētāju atbalstu. Ir iespējami divi risinājumi: vai paaugstināt kvalitāti līdz cenu līmenim, kas var samazināt mērķauditoriju, vai arī samazināt cenu līdz kvalitātes līmenim, kas sekmēs lielāku klientu apgrozību, respektīvi augstāku apgrozījumu.



2.att. Uzņēmumu novērtēšanas kritēriju modu atspoguļojums (II) (Avots: autoru apkopojums)

Apskatot konkurētspējas reitingā zemāk esošos uzņēmumus (2.att.) var redzēt, ka uzņēmumam „Oregano" piemīt augstākie vērtējumi, taču tiem neizdodas apmierināt klientu vajadzības, šīs problēmas cēlonis ir tas, ka uzņēmumam nav skaidri nospausti mērķi un darba uzdevumi, klientu gaidas ir augstākas nekā reālā situācija - uzņēmumam ir jāstabilizējas un jāpārdomā darbības gaita. Tāpat jāparūpējas par lojalitātes programmu, lai izstrādātu un izveidotu savu klientu loku.

Uzņēmuma „Shangri - La" darbība ir diezgan haotiska, par to liecina grafika līkne – ja uzņēmums vēlas kļūt konkurētspējīgāks, tam ir jāpiestrādā pie vairākiem kritērijiem, taču jāsāk ar darbinieku darbības analīzi, ar viņu apmācību, motivēšanu, darbības standartu ieviešanu, jo visi novērtētie kritēriji, kuri ir sasitīti ar darbinieku darbību ir samērā zemā līmenī. Domājot par saviem darbiniekiem nedrīkst aizmirst par klientiem, par klientu stimulēšanas iespēju izvērtēšanu, klienti nav apmierināti ar uzņēmuma lojalitāti. Jāizpēta klientu paradumi, lai piedāvāt viņiem vissvarīgāko un nepieciešamo.

Savukārt apskatot pusdienu restorānu „Daily" var piekrist, ka viņu darbības specifika un mērķi sakrīt ar novērtēšanas rādītājiem – klienti ar kritērijiem lielākoties ir vidēji apmierināti, kā arī galvenie faktori pēc kuriem cilvēki dodas tieši uz šo restorānu ir augstākā līmenī, nekā parējie – izpildes termiņu ievērošana – cilvēkiem ir svarīgs laiks, tāpat cilvēki augstu novērtē cenai atbilstošu kvalitāti, kas liecina, ka uzņēmums nodrošina kvalitatīvas pusdienas, tajā pašā laikā rūpējas ne tikai par cilvēku vēderu, bet arī par maku. Arī kritērijs – pieejamība ir augstu novērtēts, klienti skaidri zin un izmanto šo ēdināšanas uzņēmumu tieši tajā laikā, kad viņiem un izņēmumam tas ir ērti. Abu pušu starpā ir pozitīva sadarbība.

Secinājumi

Izvērtējot pētījumā iegūtos datus, var secināt, ka uzņēmumu konkurētspēja ir viens no galvenajiem uzņēmuma ietekmes faktoriem, tā nosaka uzņēmuma vietu nozares tirgū. Tā kā sabiedriskās ēdināšanas nozare ir pietiekami plaša, katram uzņēmumam ir svarīgi, atrast un ieņemt vietu tajā, tādā veidā, lai spētu veiksmīgi darboties un pildīt savas funkcijas. Tirgū pastāv visdažādākie uzņēmumi, katrs no tiem izceļas sev atbilstošā veidā, taču tiem ir jāspēj uzturēt efektīvu darbību un noteiktu līmeni, lai nodrošinātu sev nepieciešamo klientu daudzumu un pietiekamu apgrozījumu, lai spētu pastāvēt.

Anketēšanas rezultāti sniedz ieskatu reālajā nozares situācijā – uzņēmumu konkurētspēja ir salīdzinoši vienlīdzīga, apkopotajā uzņēmumu konkurētspējas indeksu reitingā var manīt, ka starpība starp veiksmīgākajiem un ne tik veiksmīgiem uzņēmumiem nav pārāk liela, vienīgi 6 punkti, kas liecina, ka uzņēmumu starpā pastāv samērā liela konkurence, un uzņēmumiem nepieciešams nemitīgi piestrādāt pie savas pastāvēšanas nodrošināšanas, jo riski zaudēt ieņemamo vietu ir diezgan augsti.

Analizējot iegūtos rezultātus var gan piekrist petījuma hipotēzei, gan arī nepiekrist. Uzņēmumu ķēdei piederošie uzņēmumi ieņem diezgan augstas vietas reitingā, tas nepārprotami palīdz uzņēmumam darboties, taču lielākoties tas ietekmē tirgū ieiešanas procesu, jo uzņēmumam nav īpašas vajadzības sevi pieradīt, taču darbībā, tomēr augstāk tiek novērtēti tieši patstāvīgie uzņēmumi, kuri ir nosprauduši savus mērķus, uzdevumus, izstrādājuši konkrētu piedāvājumu un pieturās pie savām vērtībām, kuras arī klienti augstu novērtē griežoties konkrētajā uzņēmumā.

Izpētot sīkāk anketēšanā iegūtos datus, autores secināja, ka uzņēmumu vidū vieni no svarīgākajiem trūkumiem ir nepietiekama darbība ar saviem darbiniekiem. Darbinieki nav pietiekami apmācīti, viņi nespēj nodrošināt veiksmīgu sadarbību ar tiešajiem klientiem. Darbinieku kompetence ir ārkārtīgi svarīga ikviena uzņēmuma darbībā, jo tieši darbinieks ir uzņēmuma vizītkarte. Produkts pats par sevi nespēj pārdoties, tā realizācijai nepieciešams vadītājs – darbinieks. Uzņēmējiem būtu jāvērš lielāka uzmanība uz savu darbinieku kvalifikācijas celšanu, tas sekmēs uzņēmējdarbības augšupeju.

Uzņēmuma lojalitāte klientam ir otrais nepietiekami novērtētais konkurētspējas kritērijs, klientiem trūkst saites ar uzņēmumu. Viņi vēlas piedalīties lojalitātes programmā – tādā veidā nodrošināt, ka aizejot no uzņēmuma viņi joprojām ir gaidīti. Cilvēki augstu vērtē individuālo pieeju. Lai sekmētu šo situāciju uzņēmumiem būtu jāizvērtē savas iespējas piedāvāt klientiem kādus individuālos piedāvājumus, personiskās akcijas u. tml. Tā kā šī ir ēdināšanas nozare, uzņēmumiem pastāv ārkārtīgi daudz iespēju to pilnveidot, kā viens no variantiem ir rīkot patstāvīgo klientu saieta pasākumus, tas stimulēs klientus neaizmirst par uzņēmumu un ļaus uzņēmumam saņemt atgriezenisko saiti.

Kopumā Teikā pastāv diezgan augsta sabiedriskās ēdināšanas nozares uzņēmumu konkurētspēja, uzņēmumi pēc iegūtajiem rezultātiem ir cieši sarindoti. Uzņēmumu starpā pastāv augsts konkurences līmenis, kas veicina uzņēmējus nemitīgi sekot līdzi tirgus norisēm, veidot attīstības plānus, kā arī aktīvi darboties uzņēmuma ietvaros, lai celtu savu konkurētspēju nozarē un teritorijā. Datu analīze pierādīja, ka neviens no teritorijā esošajiem uzņēmumiem nav 100% konkurētspējīgs, šis stāvoklis ir gandrīz neiespējams, taču tas ļauj uzņēmumiem neapstāties un augt.

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Eduards Heinsbergs. AZARTSPĒĻU UN IZLOŽU NODOKĻU IEŅĒMUMU SADALĪJUMA ANALĪZE

Ekonomikas un kultūras augstskola, Vadības zinības, eduards133@gmail.com

Zinātniskais vadītājs: Mg.oec., lektore Tatjana Daudiša

Anotācija

Pētījuma aktualitāte: Augot azartspēļu un izložu nozares apgrozījumam un peļņai, aug arī samaksātie nodokļi. Azartspēļu un izložu nozare ir viens no lielākajiem nodokļu maksātājiem valstī, kā arī sekmē gan valsts, gan dažādu pašvaldību bužeta ieņēmumus. Pēc Latvijas Spēļu biznesa asociācijas(LSBA) 2019. gada datiem, Latvijā darbojas 309 spēļu zāles un pieci kazino. Rīgā no tām darbojas 150 spēļu zāles un četri kazino. Gan nozares uzņēmumu nodokļus, gan šo nodokļu ieņēmumu sadalījumu regulē likums "Par izložu un azartspēļu nodevu un nodokli", kurš līdz šim noteica, ka 75% no azartspēļu nodokļu ieņēmumiem nonāca valsts pamatbudžetā un 25% konkrētās pašvaldības budžetā, kuras teritorijā tiek organizētas azartspēles. Taču ar 2020.gada 1.janvāri stājās spēkā izmaiņas likumā, kas noteica jaunas nodokļu likmes, bet arī turpmāk paredz ka valsts budžetā nonāks 95%, bet pašvaldību budžetā 5% no nodokļu ieņēmumumiem.

Pētījuma mērķis: Izpētīt un izanalizēt kādu iespaidu uz valsts un pašvaldību bužetiem atstās 2020. gada 1.janvārī spēkā stājušās nodokļa likmju un ieņēmumu sadalījuma izmaiņas.

Pētījuma metodes: Literatūras analīze; Kvantitatīvā metode; Komparatīvā metode; Grafiskā analīze.

Sasniegtie rezultāti: Iegūti un salīdzināti dati, kas ļāuj izvērtēt azartspēļu un izložu nodokļu ieņēmumi sadalījuma izmaiņas starp valsts un pašvaldību bužetiem sakarā ar nodokļu izmaiņām.

Atslēgas vārdi: Azartspēles; budžets; nodokļi.

Ievads

Azartspēļu nozare ir viena no vispelnošākajām nozarēm valstī ar vienu no lielākajiem nodokļu slogiem. Pēc Izložu un azartspēļu uzraudzības inspekcijas datiem, Latvijā šobrīd ir 16 aktīvas azartspēļu licences, kas īpašniekiem dod tiesības organizēt azartspēles atverot spēļu zāles vai kazino, vai darot to digitālajā vidē. Pēc Latvijas spēļu biznesa asociācijas datiem, Latvijas teritorijā šobrīd darbojas 307 spēļu zāles un 4 kazino. Spēļu zāļu un kazino skaits pēdējo piecu gadu laikā ir samazinājies, 2015. gadā Latvijas teritorijā kopumā darbojās 322 spēļu zāles un 5 kazino. Šādu kritumu, iespējams skaidrot ar Rīgas Domes 2019. gada 27. martā pieņemto likumu par spēļu zāļu slēgšanu Rīgas teritorijā. Rīgā atrodas lielākais spēļu zāļu skaits 143, kas piecu gadu laikā sarucis no 159 spēļu zālēm.

Nozīmīgas izmaiņas pēdējo piecu gadu laikā notikušas arī azartspēļu nodokļa likmēs un ieņēmumu sadalījumā, kas iespējams pozitīvi var ietekmēt valsts budžetu un negatīvi pašvaldību budžetu.

Pētījuma mērķis ir izpētīt un izanalizēt kādu iespaidu uz valsts un pašvaldību bužetiem atstās 2020. gada 1.janvārī spēkā stājušās nodokļa likmju un ieņēmumu sadalījuma izmaiņas.

Azartspēļu nozares nodokļu sistēma

Azartspēļu nodokļa likmes, nomaksas kārtību un nodokļa ieņēmumu sadalījumu regulē likums "Par izložu un azartspēļu nodevu un nodokli". Likums nosaka, ka uzņēmumi, kas saņēmuši licenci no Izložu un azartspēļu uzraudzības inspekcijas un organizē azartspēles, maksā nodokļus katru mēnesi par iepriekšējā mēneša aktīvo spēļu galdu vai automātu skaitu. Likumā ir noteikta likme, kas jāmaksā par katru galdu un automātu. Totalizatoriem jāmaksā 15% no ieņēmumiem un interneta kazino 10% no ieņēmumiem.

Pēdējo piecu gadu laikā ir notikušas būtiskas izmaiņas nodokļu likmēs:

- 01.12.2015 – Nodokļu likme spēļu galdiem paaugstināta uz 18000€(iepriekš 17279,36€) un spēļu automātiem uz 3204€(iepriekš 3141,7€)
- 27.07.2017 – Nodokļu likme spēļu galdiem 23400€(pieaugums par 5400€), spēļu automātiem 4164€(pieaugums par 960€)
- 13.11.2019 – Nodokļu likme spēļu galdiem 28080€(pieaugums par 4680€), spēļu automātiem 5172€(pieaugums par 1008€).

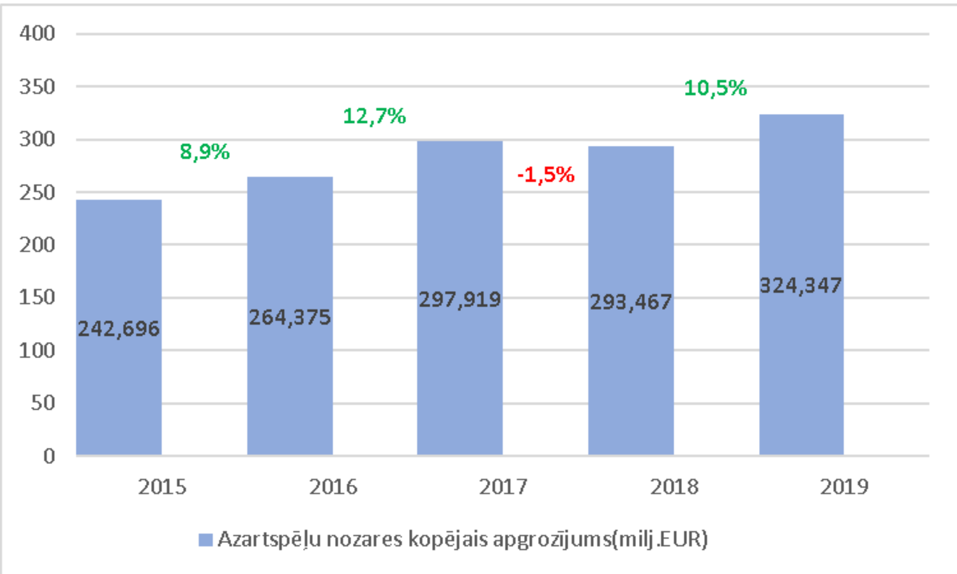
Ja spēļu zālē atrodas 10 spēļu automāti, tas nozīmē, ka spēļu zāle katru mēnesi nodokļos maksās 51720€, jeb 5172€ par katru aktīvo automātu.

Kazino, spēļu zāles un totalizatori maksā nodokļus un šie nodokļu ieņēmumi tiek sadalīti starp valsti un konkrētu pašvaldību, kuras teritorijā tiek organizētas azartspēles. Līdz šim 25% no šiem ieņēmumiem tika ieskaitīt pašvaldības budžetā un 75% valsts pamatbudžetā. Bet 2019. gada 13. novembrī tika pieņemts likums, ka pašvaldības turpmāk saņems 5% no ieņēmumiem un valsts pamatbudžetā tiks ieskaitīti 95%.

Ieņēmumi no interneta kazino pa tiešo nonāk valsts pamatbudžetā.

Azartspēļu nozares uzņēmumu apgrozījums

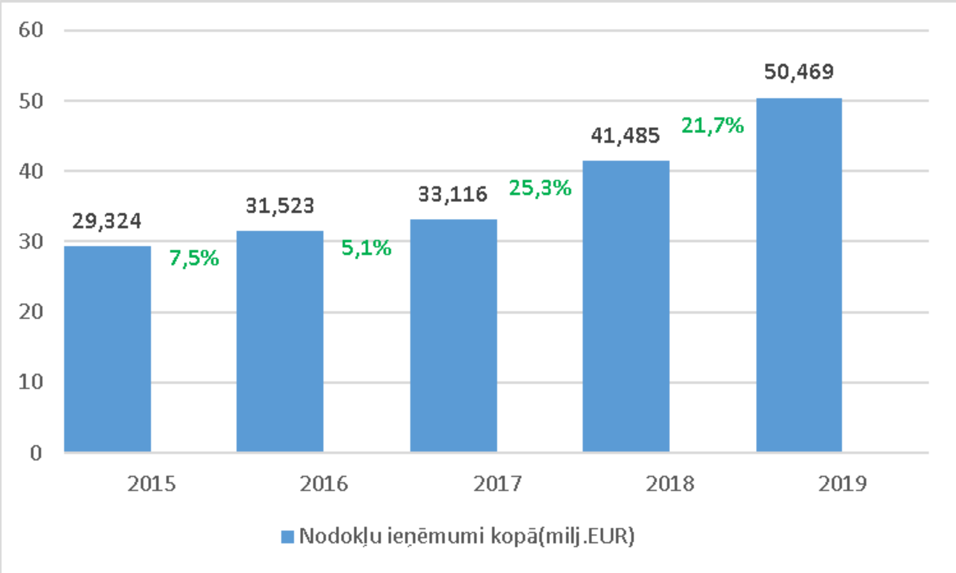
Pēc Izložu un azartspēļu uzraudzības inspekcijas datiem, laika periodā no 2015. līdz 2019. gadam, azartspēļu nozares kopējais apgrozījums ir audzis par 33,64%, 2015. gada apgrozījums sastādīja 242,696 miljoni eiro un 2019. gadā 324,347 miljoni eiro (1. att.). Vidējais apgrozījuma pieaugums šajā laika periodā bija aptuveni 7,7% gadā. Šādu apgrozījuma pieaugumu iespējams skaidrot ar demogrāfiju, jo katru gadu aug jaunu spēlētāju skaits, kas sasniedz atļauto vecumu, lai varētu piedalīties azartspēlēs, kā arī tūrisms palīdz celt šīs nozares apgrozījumu.



1.att. Azartspēļu nozares apgrozījums no 2015. – 2019. gadam (Avots: Izložu un azartspēļu uzraudzības inspekcijas dati)

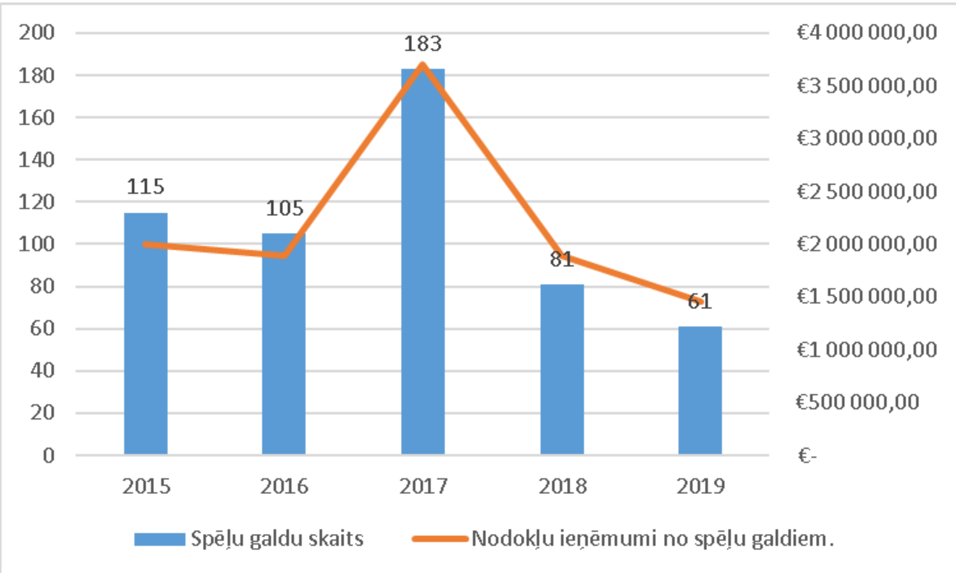
Azartspēļu nozares nodokļu ieņēmumi

Nodokļu ieņēmumi, laika periodā no 2015. gada līdz 2019. gadam auguši par 72,11%, jeb 21,145 miljoniem eiro (2.att.).

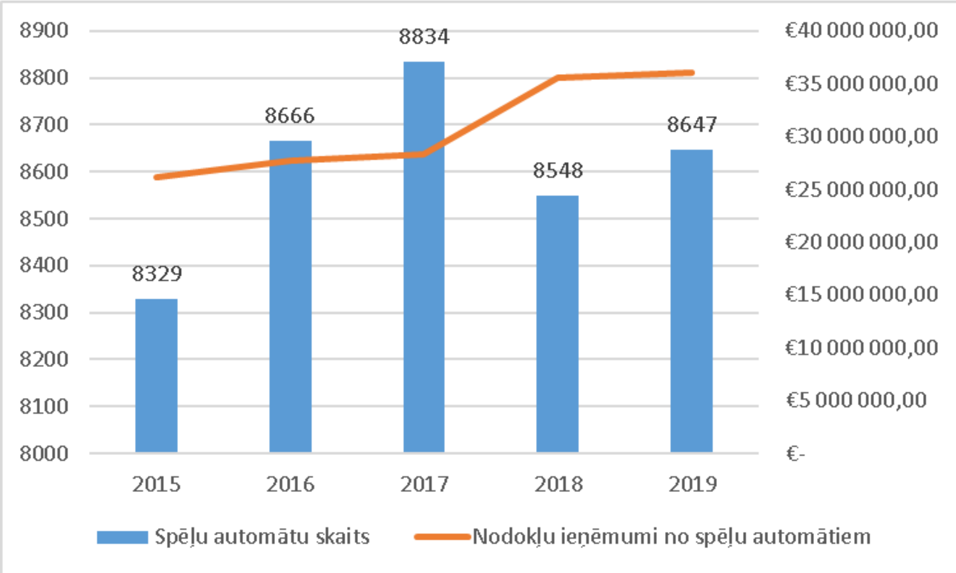


2. att. Azartspēļu nodokļa ieņēmumi no 2015. līdz 2019. gadam (Avots: Latvijas spēļu biznesa asociācijas dati)

Nodokļu ieņēmumus relatīvi ietekmējuši aktīvie galdi un automāti spēļu zāles un kazino. Lai gan šo galdu un automātu kopskaits pēc katras nodokļu reformas tiek krasi mainīts, pieaugošā nodokļu likme palīdz gūt lielākus ienākumus vai noturēt ienākumus līmenī gadījumā, ja galdu vai automātu skaits krasi mainās. (3., 4. att.)



3. att. Spēļu galdu skaita izmaiņas no 2015. līdz 2019. gadam (Avots: Latvijas spēļu biznesa asociācijas dati)



4. att. Spēļu galdu skaita izmaiņas no 2015. līdz 2019. gadam (Avots: Latvijas spēļu biznesa asociācijas dati)

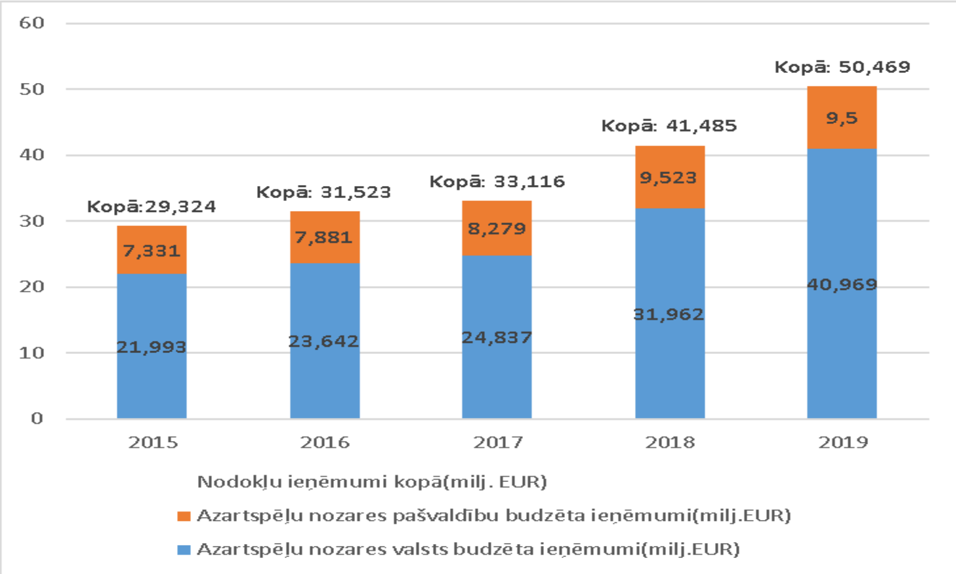
Uz šo brīdi pēc Latvijas spēļu biznesa asociācijas datiem ir aktīvi 58 spēļu galdi, kas ir pat 3 mazāk nekā 2019. gadā un 8141 automāti, kas ir par 506 mazāk nekā pērn. Grūti prognozēt vai šis skaits vēl kritīsies, jo no vienas puses nozaes uzņēmumi vēlas maksimālu peļņu, bet no otras nav ieinteresēti maksāt augstākus nodokļus par galdiem vai automātiem, kas strādā ar zaudējumiem. Tieši tādēļ turpmākajiem aprēķiniem pieņemsim, ka šie rādītāji nemainās.

Azartspēļu nozares nodokļu sadalījums starp valsts un pašvaldību budžetiem.

Pēdējo piecu gadu laikā pašvaldību budžeta ieņēmumi auguši par 29,59%, no 7,331 miljonam eiro 2015. gadā līdz 9,5 miljoniem eiro. Vidējais pieaugums katru gadu bija 6,83%. Tikai 2019. gadā ieņēmumi kritās par 0,24% salīdzinot ar 2018. gadu.

Valsts budžeta ieņēmumi šajā laika peridoā auguši par 86,28%, no 21,993 miljoniem eiro 2015. gadā līdz 40,969 miljoniem eiro 2019. gadā. Vidējais pieaugums gadā bija 17,35% un šie nodokļu ieņēmumi ir stabili auguši. (5. att.)

Šādi azartspēļu nodokļu ieņēmumu sadalījums izskatās tradicionālajā 25/75 formā, tomēr 2020. gada azartspēļu nodokļu ieņēmumi tiks sadalīti jaunajā 5/95 formātā, kas nozīmē, ka valsts budžetam varētu būt lieli ieguvumu, bet pašvaldību budžeti ciestu.



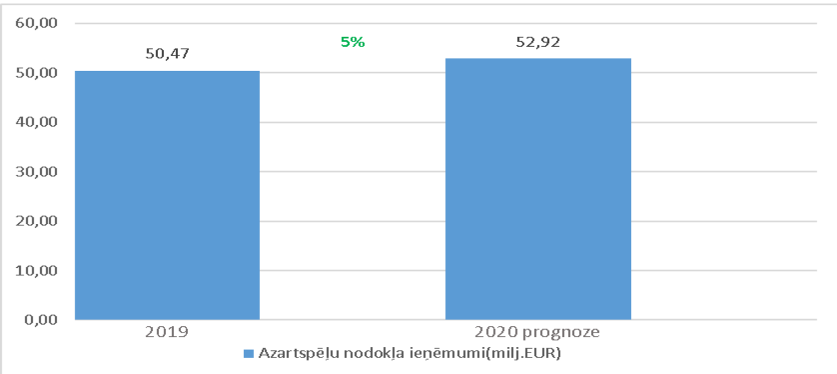
5. att. Azartspēļu nozares nodokļu ieņēmumu sadalījums no 2015. līdz 2019. gadam (Avots: Latvijas spēļu biznesa asociācijas dati)

Pētījuma metodoloģija

Pētījums galvenokārt balstīts uz statistikas datiem, kas iegūti no Izložu un azartspēļu uzraudzības inspekcijas un Latvijas spēļu biznesa asociācijas. Nepieciešami dati tika atlasīti izmantojot literatūras analīzi un izmantojot kvantitatīvo un komparatīvo analīzi aprēķināti, salīdzināti un no iegūtajiem rezultātiem izdarīti secinājumi par pētījuma mērķi.

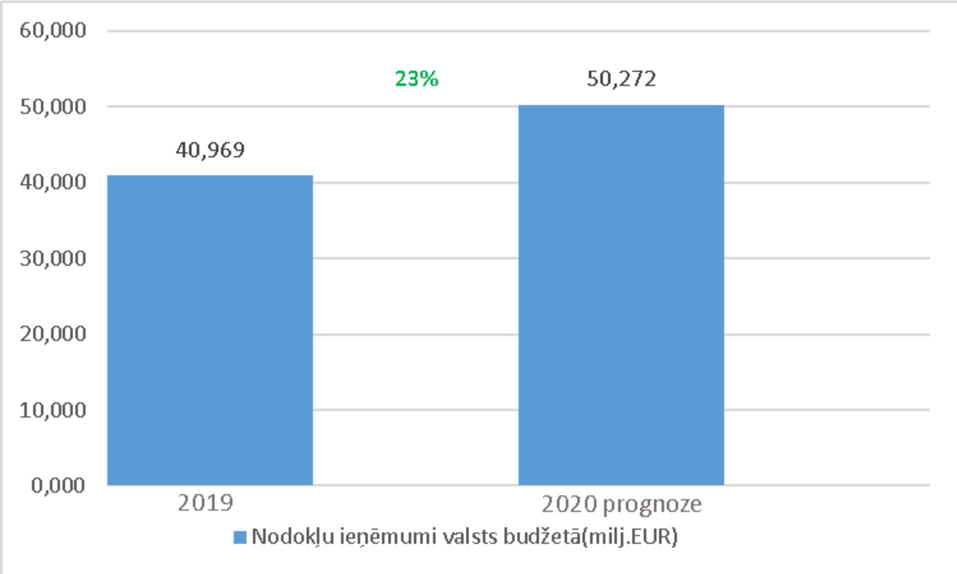
Pētījuma rezultāti

Ja pieņemam, ka nedz spēļu zāļu, nedz kazino un tajos esošo galdu, un automātu skaits 2020. gadā krasi nemainītos. Prognozētie azartspēļu nodokļa ieņēmumi 2020. gadā salīdzinot ar iepriekšējo gadu augstu pat 5%, jeb aptuveni 2,54 miljoniem eiro (6. att.).



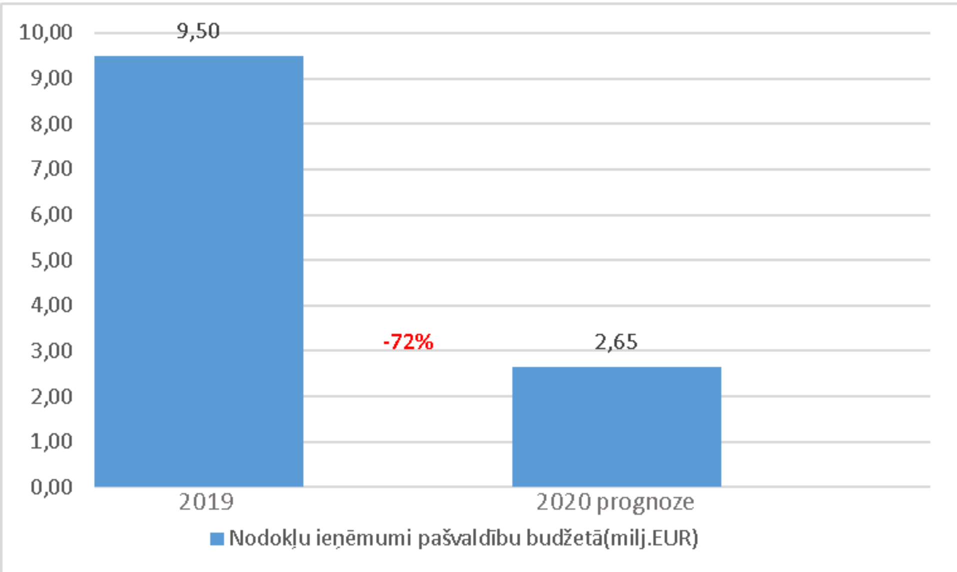
6. att. Prognozētie azartspēļu nodokļa ieņēmumi 2020. gadam (Avots: autora aprēķini un Latvijas spēļu biznesa asociācijas dati)

Pēc nodokļa ieņēmumu pārdales, valsts budžetā tiktu ieskaitīti 95% no nodokļa ienēmumiem, tādējādi prognozētie ieņēmumi būtu 50,272 miljoni eiro, kas būtu par 23%, jeb 9,303 miljoniem vairāk nekā 2019. gadā (7. att.).



7. att. Prognozētie valsts budžeta ieņēmumi no azartspēļu nodokļa nodokļa 2020. gadā (Avots: autora aprēķini un Latvijas spēļu biznesa asociācijas dati)

Valsts budžetā tiktu ieskaitīti atlikušie 5%, jeb aptuveni 2,65 miljoni, kas būtu par 72%, jeb 6,86 miljoniem eiro mazāk nekā 2019. gadā(skatīt ..). Lai pašvaldības neciestu zaudējumus, azartspēļu nodokļa ieņēmumiem būtu jābūt 180,5 miljoniem eiro, kas ir neiespējams apjoms. Tādēļ pašvaldības var zaudēt līdz pat 80% no šī nodokļā ieņēmumiem. Visvairāk zaudēs pašvaldības, kurās ir vislielākais spēļu zāļu skaits, kā, piemēram, Rīgas pašvaldība, kur 145 spēļu zāles un 4 kazino, kā arī Daugavpils, Jelgavas un Liepājas pašvaldības, kur katrā atrodas pa 14 spēļu zālēm.



8. att Prognozētie pašvaldību budžeta ieņēmumi no azartspēļu nodokļa nodokļa 2020. gadā (Avots: autora aprēķini un Latvijas spēļu biznesa asociācijas dati)

Secinājumi

1. Kopējie azartspēļu nodokļa ieņēmumi ir stabili auguši un iespējams joprojām turpinās augt.
2. Sakarā ar jauno nodokļu reformu, kas paredz, ka turpmāk 5% no azartspēļu nodokļa ieņēmumiem nonāks pašvaldību budžetā un 95% valsts budžetā. Valsts budžets prognozētie ieņēmumi 2020. gadā varētu celties par vairāk nekā 20%.
3. Nodokļu reforma negatīvi ietekmēs pašvaldību budžetus, kuru ieņēmumi varētu sarukt pat līdz 80%.
4. Lai pašvaldības necietu zaudējumus, nodokļu ieņēmumiem būtu jābūt vismaz 180,5 miljoniem eiro, kas ir neiespējams apjoms, jo lai sasniegtu šādus ieņēmumus, azartspēļu nozares apgrozījumam būtu jābūt vismaz ap 600 miljoniem eiro.

Izmantotās literatūras un informācijas avotu saraksts

Izložu un azartspēļu uzraudzības inspekcijas statistika. [skatīts 18.03.2020.]. Pieejams: https://www.iaui.gov.lv/lv/statistika/informacija-presei/arhivs

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Latvijas Spēļu biznesa asociācijas dati. [skatīts 18.03.2020.]. Pieejams: https://lsba.lv/nozares-dati/

LR likums "Par izložu un azartspēļu nodevu un nodokli" [skatīts 18.03.2020.]. Pieejams: https://likumi.lv/doc.php?id=57415

Eduards Heinsbergs[1], Elīna Švarca[2]. INFORMĀCIJAS UN KOMUNIKĀCIJAS TEHNOLOĢIJU NOZARES UZŅĒMUMA ATTĪSTĪBAS IESPĒJAS LATVIJĀ

[1]*Ekonomikas un kultūras augstskola, Vadības zinības, eduards133@gmail.com*

[2] *Ekonomikas un kultūras augstskola, Vadības zinības, Esvarca@gmail.com*

Zinātniskais vadītājs: *Dr.oec., profesore Vita Zariņa*

Anotācija

Pētījuma aktualitāte: Informācijas tehnoloģijām un digitālo komunikāciju veidiem attīstoties un pieaugot to būtiskai nozīmei gan uzņēmējdarbībā, gan ikdienas dzīvē, informācijas un komunikācijas tehnoloģiju (IKT) nozare ir kļuvusi par vienu no visstraujāk augošajām tautsaimniecības nozarēm Latvijā pēdējo gadu laikā. Informācijas un komunikācijas tehnoloģiju nozarē uzņēmumu skaits pēdējo gadu laikā ir pieaudzis par pusotru tūkstoti uzņēmumu. 2018.gadā no tiem visvairāk darbojās dažādās informācijas un komunikāciju tehnoloģiju pakalpojumu sniegšanas sfērās (6894 uzņēmumu). Apgrozījums šajā sektorā 2018.gadā sasniedza 37923 miljonus eiro. 55,9 % no kopējās informācijas un komunikāciju tehnoloģijas nozares uzņēmumu apgrozījuma nodrošināja informācijas pakalpojuma sfēras uzņēmumi un vismazāk – 8,7% IKT ražošanas sfēras uzņēmumi. Pieaugot uzņēmumu skaitam šajā nozarē, palielinājies arī nodarbināto skaits. 2018.gadā IKT sektorā tika nodarbināts 37,0 tūkstoši darbinieku, no tiem 88, 0% tika nodarbināti IKT pakalpojumu sniegšanas sfērā, 7,6 % IKT vairumtirdzniecības sfērā un 4,4% IKT ražošanas sfērā. IKT nozare ir strauji mainīga un ātri attīstoša, tādēļ nozares uzņēmumiem ir svarīgi sekot līdzi informācijas plūsmai un dažādiem jaunumiem, lai turpinātu izaugsmi un sekmētu sava uzņēmuma attīstību.

Pētījuma mērķis: Novērtēt informācijas un komunikācijas tehnoloģiju nozares uzņēmuma attīstības iespējas Latvijā.

Pētījuma metodes: Sekundārā datu analīze, statistiskā datu apstrāde, grafiskā analīze, mediju monitorings.

Sasniegtie rezultāti: Pētījuma rezultāti ļauj izprast kādas ir informācijas un komunikācijas tehnoloģiju nozares uzņēmumu attīstības iespējas un tendences Latvijā. Secinājumi parāda, ka šajā sfērā ir ļoti plašas iespējas turpināt attīstīties gan esošajiem uzņēmumiem, gan veidoties jauniem uzņēmumiem.

Atslēgas vārdi: Tehnoloģijas; informācija; IT; dati; nozare.

Ievads

Pēdējo gadu laikā informācijas un komunikāciju tehnoloģijas (ITK) ir būtiski attīstījušās un izmainījušas gan cilvēku ikdienas dzīvi, gan uzņēmējdarbību, gan padarījušas iespējamus jaunus biznesa modeļus. Informācijas un komunikācijas tehnoloģiju nozarē uzņēmumu skaits pēdējo gadu laikā ir pieaudzis par pusotru tūkstoti uzņēmumu. 2018.gadā no tiem visvairāk darbojās dažādās informācijas un komunikāciju tehnoloģiju pakalpojumu sniegšanas sfērās (6894 uzņēmumu). Apgrozījums šajā sektorā 2018.gadā sasniedza 3793 miljonus eiro. 55,9 % no kopējās informācijas un komunikāciju tehnoloģijas nozares uzņēmumu apgrozījuma nodrošināja informācijas pakalpojuma sfēras uzņēmumi un vismazāk – 8,7% IKT ražošanas sfēras uzņēmumi. Pieaugot uzņēmumu skaitam šajā nozarē, palielinājies arī nodarbināto skaits. 2018.gadā IKT sektorā tika nodarbināti gandrīz 37,0 tūkstoši darbinieku, no tiem 88, 0% tika nodarbināti IKT pakalpojumu sniegšanas sfērā, 7,6 % IKT vairumtirdzniecības sfērā un 4,4% IKT ražošanas sfērā. IKT nozare ir strauji mainīga un ātri attīstoša, tādēļ nozares uzņēmumiem ir svarīgi sekot līdzi informācijas plūsmai un dažādiem jaunumiem, lai turpinātu izaugsmi un sekmētu sava uzņēmuma attīstību.

Pētījuma mērķis ir novērtēt informācijas un komunikācijas tehnoloģiju nozares uzņēmuma attīstības iespējas Latvijā. Lai sasniegtu mērķi, tika izvirzīti šādi uzdevumi:

1. Sniegt ieskatu IKT nozares attīstībā Latvijā pēdējo gadu laikā;

2. Analizēt iegūto informāciju;
3. Izdarīt secinājumus par IKT nozares uzņēmuma attīstības iespējām Latvijā.

Autoru pētījumā izmantotās metodes: sekundārā datu analīze, statistikas datu apstrāde, grafiskā analīze, mediju monitorings.

Rezultāti ļauj izprast kādas ir informācijas un komunikācijas tehnoloģiju nozares uzņēmumu attīstības iespējas un tendences Latvijā.

Informācijas un komunikāciju tehnoloģijas nozares makroekonomiskās situācijas raksturojums

Informācijas un komunikāciju tehnoloģiju (IKT) nozare statistikas pārskatos tiek aplūkota atbilstoši starptautiskajai Ekonomiskās sadarbības un attīstības organizācijas (OECD) definīcijai, kura nosaka šādu veidu ekonomisko darbības veidu (saskaņā ar NACE 2.red) iekļaušanu:

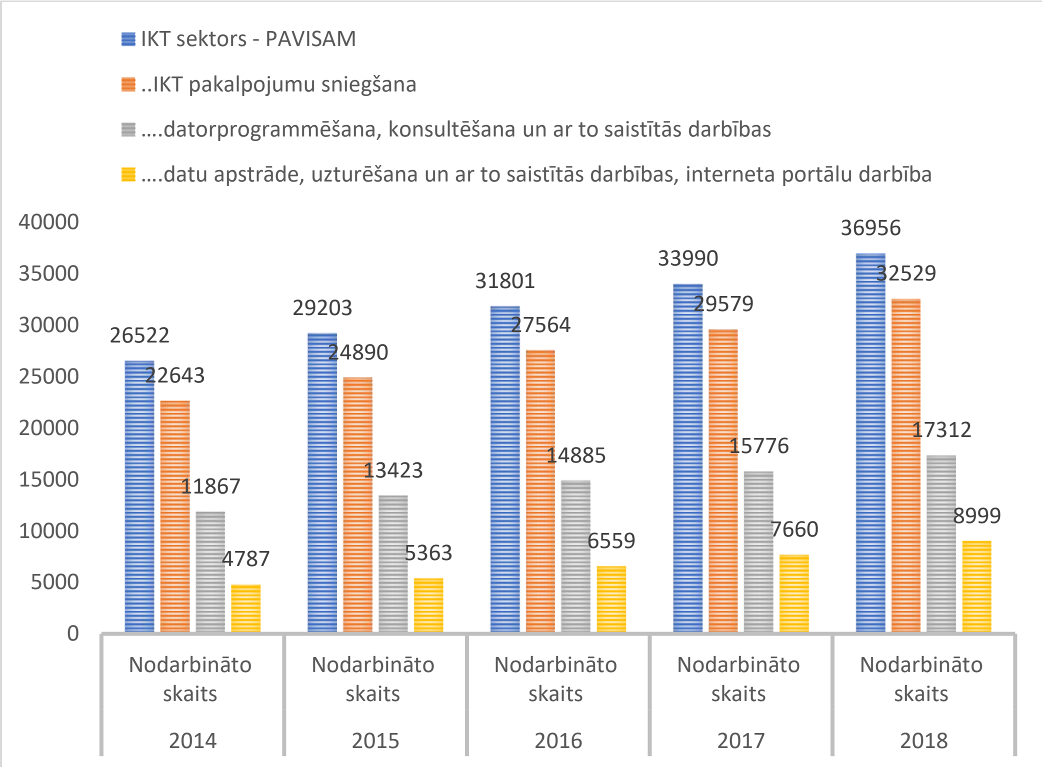
- IKT ražošana;
- IKT vairumtirdzniecība;
- IKT pakalpojumu sniegšana, datorprogrammu tiražēšana;
- telekomunikācijas;
- datorprogrammēšana, konsultēšana un ar to saistītās darbības;
- datu apstrāde, uzturēšana un ar to saistītās darbības, internetu portālu darbība;
- datoru, to perifēro iekārtu un sakaru iekārtu remonts.

Kopš 2014.gada uzņēmumu skaits un to apgrozījums IKT nozare katru gadu pieaug. Uzņēmum skaits salīdzinot ar 2014.gadu, 2018.gadā ir pieaudzis par 26,9%. Savukārt apgrozījums nozarē salīdzinot ar 2014.gadu, 2018.gadā ir pieaudzis par 8,5% (1.tabula).

1.tabula. IKT nozares uzņēmumu skaits un apgrozījums (Avots: Informācijas un komunikācijas tehnoloģiju lietošana un e-komercija uzņēmumos 2019.gadā)

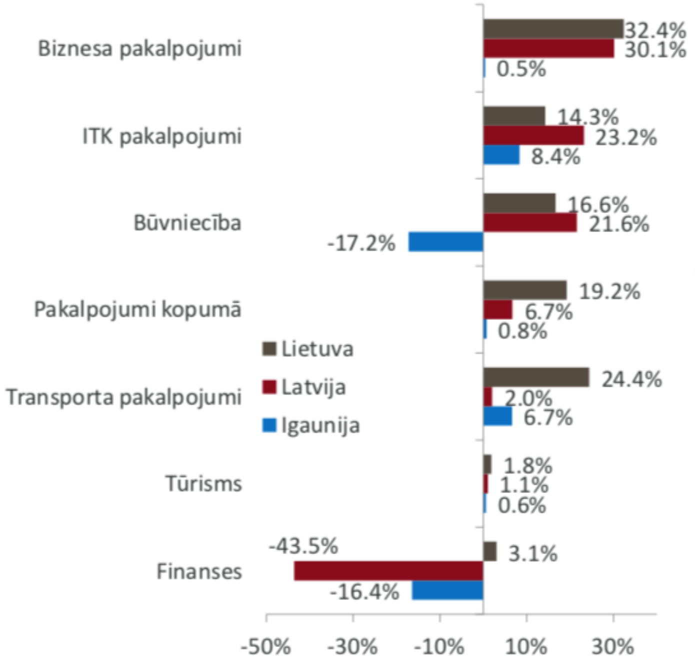
	Uzņēmumu skaits					Apgrozījums (milj. eiro)				
	2014	2015	2016	2017	2018	2014	2015	2016	2017	2018
IKT sektors – pavisam	5 432	6 133	6 567	6 559	6 894	3 063	3 497	3 471	3 617	3 793
IKT ražošana	104	112	113	116	111	182	258	281	320	329
IKT vairumtirdzniecība	578	638	614	586	544	1 457	1 689	1 524	1 460	1 343
IKT pakalpojumu sniegšana	4 750	5 383	5 840	5 857	6 239	1 424	1 550	1 667	1 837	2 121
datorprogrammatūras tiražēšana	30	29	36	40	41	5	4	5	4	4
telekomunikācijas	543	592	603	555	539	729	762	789	818	913
datorprogrammēšana, konsultēšana un ar to saistītās darbības	2 938	3 386	3 677	3 732	4 067	471	536	613	713	863
datu apstrāde, uzturēšana un ar to saistītās darbības, interneta portālu darbība	909	1 027	1 134	1 153	1 231	199	224	242	284	324
datoru, to perifēro iekārtu un sakaru iekārtu remonts	330	349	390	377	361	20	24	18	18	17

Pieaugot uzņēmuma skaitam un apgrozījuma, pieaudzis ir arī nodarbināto skaits šajā nozarē. Nodarbināto skaits nozarē kopā salīdzinot ar 2014.gadu ir pieaudzis par 39,3 %. Vislielākais nodarbināto skaita pieaugums salīdzinot ar 2014. gadu ir novērojams datu apstrādes, uzturēšanas un ar to saistīto darbību, interneta portālu apakšnozarē 89,9% . Lielākais nodarbināto skaits nozarēs ir IKT pakalpojumu sniegšanas apakšnozarē (1.1.att).



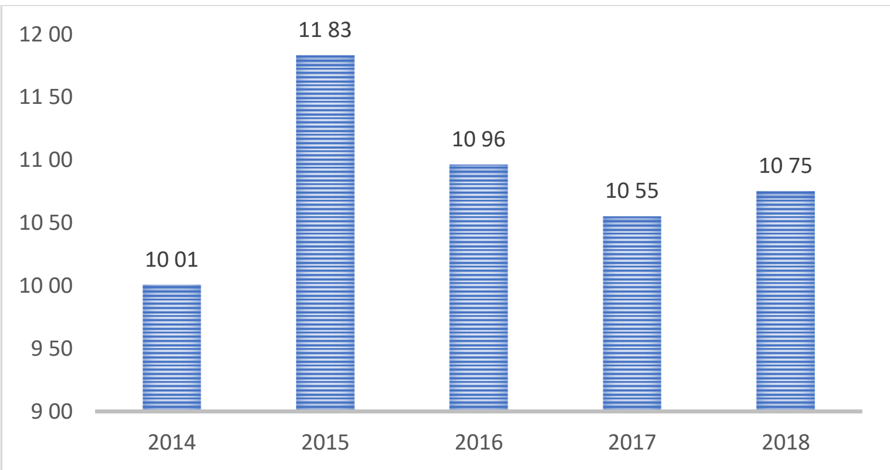
1.1.att. IKT nozarē nodarbināto skaits (Avots: Autoru apkopotie Centrālas statistikas pārvaldes dati,2020)

Svarīgs mikroekonomikas rādītājs ir IKT nozares eksporta apjoms. ITK nozares pakalpojumu eksports joprojām ir visstraujāk augošā nozare ne tikai Latvijā , bet arī Baltijas valstīs kopā. 2019. Gada 1.ceturksnī ITK pakalpojumu eksports sasniedz 23,2% (1.2.att.).



1.2.att. Pakalpojumu eksports 2019.g.1.cet.,% pret iepriekšējo gadu (Avots: Baltijas ekonomikas apskats, 2019)

Savukārt IKT nozares produktu eksporta apjoma straujš pieaugums, pēdējo gadu laikā bija novērots 2015.gadā, kas veidoja 1,183 milj. eiro. 2016.gadā un 2017.gadā bija novērojam IKT nozares produktu eksporta lejupslīde. 2018.gadā produktu eksports atkal pieauga attiecībā pret iepriekšējo gadu par 1,9% (1.3.att).



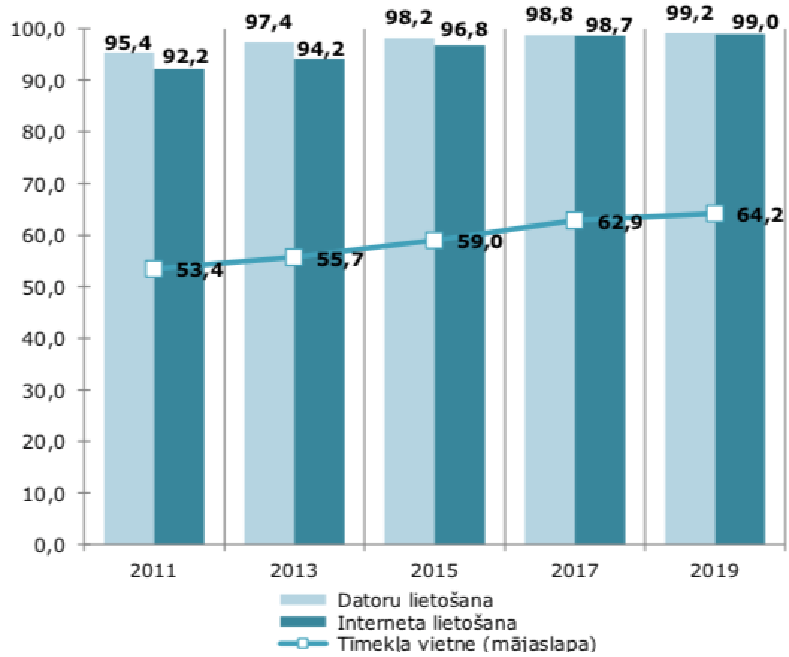
1.3.att. IKT nozares produktu eksports kopā (milj.euro) (Avots: Autoru apkopotie Centrālas statistikas pārvaldes dati)

Pētījuma metodoloģija

Veicot pētījumu tika analizēti un apkopoti statistikas dati par ITK nozari un attēloti dati tabulās un diagrammās. Tika veikta arī sekundārā datu analīze- izmantojot jau publicētos statistikas datu par nozari. Autori apskatīja un atlasīja informācija no citu speciālistu ziņojumiem par ITK nozari. Tika veiktas Autori veica mediju monitoringu par pēdējam aktualitātēm IKT nozarē.

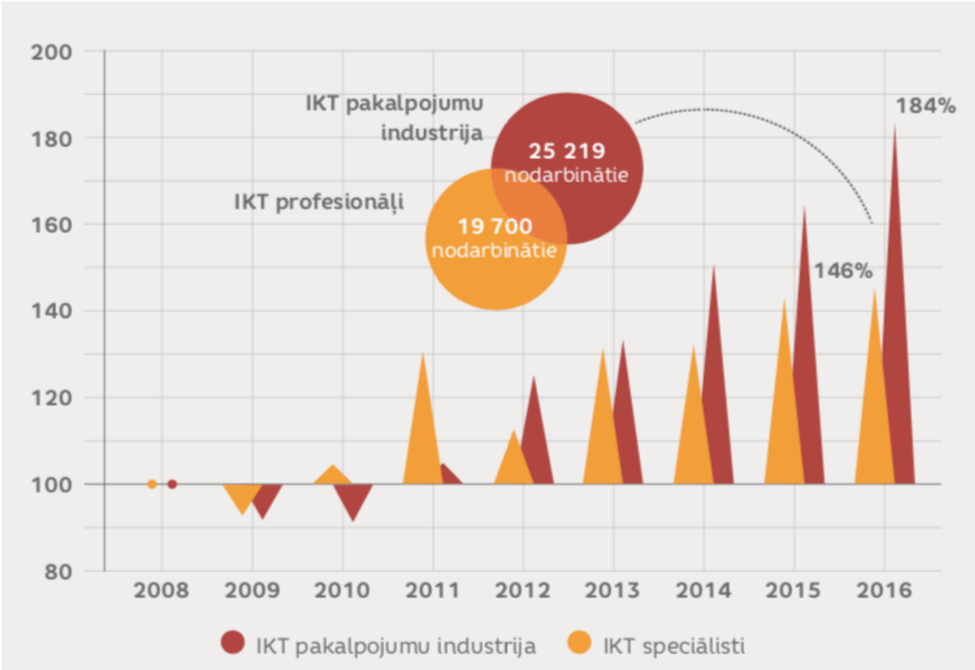
Pētījuma rezultāti

- ITK nozares makroekonomikas rādītāji ir pozitīvi un ar augšupejošu tendenci. Ir novērojams gan uzņēmumu skaita pieaugums, gan apgrozījuma pieaugums, gan darbinieku skaita pieaugums, gan eksporta rādītāju pieaugums. ITK nozares pievienotās vērtības īpatsvars Latvijas iekšzemes kopproduktā veidoja 4,3%, kas ir par 0,1% nekā 2017.gadā.
- ITK nozares attīstību arī nodrošina tas, ka gan drīz visi uzņēmumi, kur nodarbināto skaits ir virs 10 un vairāk, izmanto datorus un internetu, kā arī vairāk kā puse no Latvijas uzņēmumiem izmanto iekšējās mājaslapas jeb tīmekļa vietnes (1.4.att).



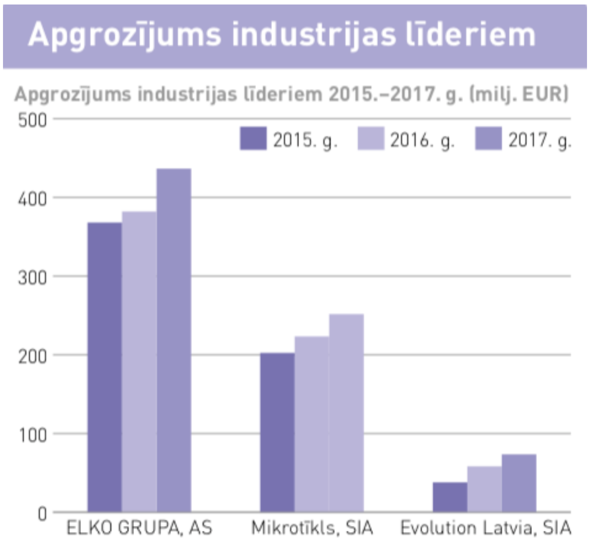
1.4.att. Datoru, interneta un tīmekļu vietnes lietošana uzņēmumos ar nodarbināto skaitu virs 10 un vairāk. (Avots: Informācijas un komunikācijas tehnoloģiju lietošana un e-komercija uzņēmumos 2019.gads)

- ITK nozarei ir stabils eksporta apjoma pieaugums. Tas palielinās ne tikai skaitļos, bet pieaug arī eksporta daļas īpatsvars no kopējās nozares sniegto pakalpojuma apjoma.
- Pieaugot uzņēmumu skaitam, pieaug arī pieprasījums pēc IKT speciālistiem. Pētījumi jau liecina, ka ITK nozarē trūkst speciālistu (1.4.att.). Kaut arī ir veikti pasākumi, lai vieglāk būtu piesaistīt un nodarbināt speciālistu no ārzemēm, tomēr speciālistu trūkumu tas būtiski nav samazinājis.



1.4.att. Nodarbinātība IKT nozarē 2008.-2016.gadā, % pret 2008.gadu (2008=100%) (Avots: IKT nozare: izrāviena scenārijs, 2017)

- IKT nozares straujā attīstība ļauj izvērties esošajiem uzņēmumiem, kā arī veidoties jauniem, jo šī nozare var strādāt gan ar esošiem IKT standartiem, radīt jaunas inovācijas tirgū, kā arī ieviest dažādus jauninājumus Latvijā.



1.5. att. Apgrozījums industrijas līderiem (milj.eiro)(Avots: Leta. Latvijas Biznesa gada pārskats 2018)

Secinājumi

1. IKT ir viena no stabilākajām nozarēm Latvijā, ar pozitīviem statistikas datiem, kas parāda stabilu izaugsmi gan uzņēmumu skaitā, gan nodarbināto skaitu šajā nozarē. Kā arī turpmāko nozares attīstību nodrošina arī tas, ka

2. Globālā mērogā IKT nozare ir strauji mainīga, tādēļ šajā nozarē ir viegli ienāk jauniem uzņēmumiem piedāvājot dažādus inovatīvus risinājumus un sekmējot tālāku attīstību šajā nozarē.
3. IKT speciālisti ir ļoti pieprasīti Latvijas darba tirgū un ir novērojams labu speciālist trūkums. Valstiskā līmenī būt jāplāno, kā nodrošināt datorikas mācības ieviešanu skolās, kas atbilstu mūsdienīgai pieejai un tehnoloģiju attīstībai.
4. Globālo notikumu mērogā, redzams, ka lēnam, bet tomēr arī Latvijā automatizācija ietekmēs darbaspēka tirgu. Ar vien vairāk uzņēmumi iegulda līdzekļus.
5. Ņemot vērā kā 99% no uzņēmumiem, kuriem 10 un vairāk darbinieku uzņēmumā, lieto internetu un datoru, ļauj secināt, ka Latvijā labi attīstīta ITK infrastruktūra, kas ir vēl viens pozitīvs rādītājs ITK uzņēmumu attīstībai Latvijā

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Амир Тураев. ФАКТОРЫ, ВЛИЯЮЩИЕ НА ВЫБОР ПОТРЕБИТЕЛЕЙ НА РЫНКЕ ОДЕЖДЫ В УЗБЕКИСТАНЕ

Университет Экономики и Культуры, Менеджмент, amirtura2@gmail.com

Научный руководитель: *Доцент ЕКА, Dr. oec. Ксения Иевлева*

Аннотация

Актуальность исследования: Текстильная и швейно-трикотажная промышленность Узбекистана является одной из ведущих и динамично развивающих отраслей. Она играет существенную роль в решении государственных задач и отвечает жизненно важным интересам многих регионов. Содействует гармоничному развитию регионов, обеспечению занятости населения и улучшению его благосостояния, оказывает помощь в становлении и развития малого и частного бизнеса. Статья посвящается актуальности и роли факторов, которые влияют на потребителей при выборе одежды на современном рынке в Узбекистане. Рассмотрены и перечислены все аспекты поведения потребителей. Показаны и проанализированы этапы процесса принятия решения о покупке потребителями. В статье предоставлена наиболее актуальная проблема в условиях современного рынка товаров, который растет, тем самым влияя на уровень конкуренции среди предприятий занятых в данной отросли.

Цель исследования: выявить факторы, влияющие на выбор потребителей брэнда одежды в Узбекистане.

Методы исследования: для сбора данных были использованы анкетирование. Для обработки данных использованы описательная статистика и графический анализ.

Результаты: современный дизайн (x=9.3) и известность брэнда (x=8.1) являются самыми важными характеристиками, влияющими на выбор одежды респондентов. Наименее важными характеристиками являются местное производство (x=2.2), возможность заказать одежду онлайн (x=3.2), а также приятное обслуживание в магазине (x=4.1). *Ключевые слова*: текстильная промышленность, одежда, выбор потребителей, поведение потребителей, Узбекистан.

Введение

Текстильная и швейно-трикотажная промышленность Узбекистана является одной из ведущих и динамично развивающих отраслей. Она играет существенную роль в решении государственных задач и отвечает жизненно важным интересам многих регионов. Содействует гармоничному развитию регионов, обеспечению занятости населения и улучшению его благосостояния, оказывает помощь в становлении и развития малого и частного бизнеса.

Шохрух Каюмов сооснователь узбекского брэнда одежды Fratelli в интервью сказал: «На рынке Узбекистана очень много торговых марок, но при этом очень мало брендов. Работают на количество, а не на качество. Кроме того, профессиональных дизайнеров именно массового производства у нас нет. За исключением разве что специалистов, которые занимаются самообразованием и самостоятельно изучают сферу. В Узбекистане есть большие бренды-экспортеры, например, Ideal, Emir, ADIM, но узбекский рынок для них слишком маленький. Им неинтересно работать на Узбекистан, либо просто нерентабельно. Поэтому у нас нет развитых национальных брендов».

Цель работы – выявить факторы, влияющие на выбор потребителей брэнда одежды в Узбекистане.

Для достижения поставленной цели автор разработал **задачи**:

1. изучить теоретическую базу поведения потребителей и факторов, влияющих на него;
2. изучить рынок розничной продажи одежды в Узбекистане;
3. при помощи анкетирования идентифицировать факторы, влияющие на выбор потребителей брэнда одежды в Узбекистане;
4. при помощи описательных статистических методов выявить закономерности в удовлетворённости потребителей брэндами одежды;
5. обобщить выводы и разработать предложения по использованию выявленных факторов маркетинговой коммуникации брэндов одежды.

Использованный **метод сбора данных –** анкетирование.

Методы обработки данных: 1) описательная статистика; 2) графический анализ.

В первой части работы автор анализирует теоретическую базу поведения потребителей и факторов, влияющих на него. Во второй части работы автор разрабатывает анкету для опроса, проводит опрос среди жителей Узбекистана, анализирует результаты и выявляет факторы, влияющие на выбор потребителей брэнда одежды в Узбекистане. В рамках работы выявлено, что современный дизайн (x=9.3) и известность брэнда (x=8.1) являются самыми важными характеристиками, влияющими на выбор одежды респондентов. Наименее важными характеристиками являются местное производство (x=2.2), возможность заказать одежду онлайн (x=3.2), а также приятное обслуживание в магазине (x=4.1).

Ограничения работы: исследование было проведено в январе 2020 года, анкетирование проводилось с 18 по 22 января. В связи с ограниченными ресурсами автора анкетирование в онлайн среде, поэтому результаты нельзя считать репрезентативными генеральной выборке.

Аналитический обзор

Теоретические аспекты поведения потребителей

Потребление – это обретение и использование продуктов, услуг, идей. Поведение потребителей – это деятельность, непосредственно вовлечённая в обретение, потребление и избавление от продуктов, услуг, идей, включая процессы решений, предшествующие этой деятельности и следующие за ней (Клюкач и др. 2016).

Изучение поведения потребителей может помочь компаниям и аналитикам рынка ответить на многие маркетинговые вопросы. Пример таких вопросов автор приводит в таблице 1.1.

1.1. таблица. Вопросы изучения поведения потребителей (Романенкова, 2015)

Вопросы изучения	Цели изучения	Пример изучения
Что покупают на рынке?	Объекты покупок	Продукты
Почему покупают?	Мотивы покупок	Характеристики, цена, сервисс продукта
Что покупают?	Характеристики покупателя	Роль в процессе покупки
Как покупают?	Покупочные действия	Выбор, отбор, принятие решения
Когда покупают?	Время покупки	В день, в неделю, в сезон
Где покупают?	Место покупки	Обычные магазины, интернет-магазины, агенты

Основными теоретическими подходами, объясняющими поведение потребителя, являются теория предельной полезности и анализ кривых безразличия (Барден, 2013).

Любая теория является достаточно абстрактной моделью и строится на ряде методологических допущений, позволяющих сконцентрировать внимание на принципиальных ключевых моментах. При анализе поведения потребителя исследователи обычно полагают, что:

- все рынки товаров и услуг являются совершенно конкурентными, а все товары и услуги имеют рыночную цену;
- все домохозяйства и фирмы располагают полной и достоверной информацией, необходимой им для совершения выбора и принятия решений о потреблении или производстве. Всем точно известны цены, процентные ставки, ставки заработной платы, величины издержек производства, качество товаров и т.д.;
- в основе потребительского выбора лежит полезность, величину которой можно измерить;·все контрагенты ведут себя рационально, т.е. соотносят свои затраты и выигрыши по каждой дополнительной единице потреблённого или произведённого товара и принимают решения, при которых выигрыш был бы не меньше, чем издержки;
- потребители последовательны в своих вкусах и предпочтениях и всегда предпочитают большую полезность меньшей. Так, если полезность товара А больше полезности товара В, а та, в свою очередь, больше полезности товара С, то при выборе между товарами А и С потребитель обязательно выберет товар А и предпочтёт иметь этого товара чем больше, тем лучше (Лаптева и др., 2018).

Однако, большая часть названных выше аспектов является условными и не реализуется на практике. Редко появляются рынки совершенной конкуренции, при это потребители редко абсолютно осведомлены о реальном качестве покупаемых продуктов, в свою очередь компании чаще всего не имеют представления о скрытых нуждах и потребностях потребителей. Более того потребители не всегда ведут себя рационально и делают продуманный выбор (Романенкова, 2015).

Поэтому по мнению Ф. Бардена (2013) спорным является понятие полезности, которую можно соотнести с затратами. Индивидуальная оценка полезности является субъективной характеристикой. Отдельные индивиды оценивают полезность одной и той же вещи по-разному, в зависимости от своих вкусов и предпочтений. Более того, один и тот же потребитель оценивает полезность того же самого товара/услуги не одинаково в зависимости от конкретной ситуации, места, времени, моды и пр. (Дементьева, 2018). Подтверждением того, что потребители постоянно сравнивают предполагаемую полезность товара и затраты на него, служат такие распространённые выражения как: «Это того не стоит», «Овчинка выделки не стоит», «За свои деньги я хочу получить качественное обслуживание» (Посыпанова, 2013). На принципе рационального поведения построена вся реклама. Рекламодатель пытается убедить потребителя, что тот получит выигрыш больший, чем затраты (известные клише типа: «дополнительно 25 граммов продукта в пачке - бесплатно», «бальзам и ополаскиватель в одном флаконе», «новое качество по старой цене» и т.п.). То есть, не все желания потребителя могут быть реализованы и не каждый выбор может быть осуществлён. Например, одними из важных ограничений является время и платежеспособность. Потребителю открыты и доступны только те рыночные решения, которые позволяет принять его бюджет и время. Другие факторы, влияющие на выбор, автор рассмотрит в следующей главе.

Типы поведения потребителей

Поведение потребителя существенно меняется в зависимости от того, какой товар он покупает. Чем сложнее принять решение о покупке, тем больше требует участников и тем осторожнее ведёт себя потребитель. Авторы Р. Блэкуэлл, П. Миниард и Дж. Энджел выделяют следующее типы поведения:

1. Сложное поведение наблюдается в ситуации, когда высокая степень вовлечения потребителей сопровождается значительными различиями между разными марками товара. Высокая степень вовлечения потребителей имеет место, если продукт дорого стоит, его покупка связана с риском, происходит редко, а покупаемый предмет может служить средством самовыражения. Обычно в таких случаях потребители стремятся получить как можно больше информации о характеристиках товара данной категории (Блэкуэлл и др., 2007). Покупатель должен пройти процесс усвоения, выработать мнение в отношении товара, а затем сформировать собственный взгляд. Только после этого он сможет сделать окончательный выбор. Маркетолог, имеющие дело с товарами, требующими высокой степени вовлечения покупателя должны понимать поведение потребителей, собирающих информацию и формирующих оценки. Таким потребителям маркетолог должен рассказать о свойствах товаров этого класса и об отличиях разных марок, кроме того, он должен сообщить, какие из этих свойств может предложить данная компания. Возможно, при этом понадобятся печатные материалы и копии, которые потребитель может получить в своё распоряжение (Романенкова, 2015).

2. Неуверенное поведение наблюдается в ситуациях с высоким уровнем вовлечения, когда товар стоит дорого, его покупка связана с риском, происходит редко, однако разница между разными марками товара невелика. Потребитель тратит довольно много времени, посещая разные магазины и выбирая подходящий вариант, но покупку делает сравнительно быстро. Он выбирает товар, который будет немного дешевле либо покажется ему красивее. Впоследствии у потребителя может возникнуть чувство неудовлетворённости покупкой, когда он заметит какие-то недостатки в приобретённом товаре или услышит положительные отзывы о товаре той марки, которую он мог бы купить, но не купил. Чтобы устранить эту неудовлетворённость, маркетолог, занимающийся обслуживанием клиента после совершения покупки, должен предоставить информацию, подтверждающую правильность выбора (Блэкуэлл и др., 2007).

3. Привычное поведение имеет место при условии низкого вовлечения потребителя и небольшой разнице между различными марками товара. В таких случаях покупательское поведение не проходит трёх обычных стадий – мнение, взгляды, поведение. Потребители не ищут дополнительную информацию о марках и не оценивают их характеристики; им не нужно долго раздумывать о том, какую марку покупать. Они пассивно получают информацию во время просмотра телепередач или чтения прессы. Повторяющаяся реклама создаёт у покупателей скорее осведомлённость о марке, а не приверженность (Романенкова, 2015). У потребителей не формируется мнений и взглядов в отношении торговой марки, они выбирают её в силу хорошей осведомлённости о ней. Поскольку в этой ситуации отсутствует сильное влечение, и потребителям не свойственно оценивать свой выбор после совершения покупки – тем более раскаиваться в нём. Таким образом, в данном случае мнения покупателя относительно данной марки формируется в ходе пассивного усвоения. В результате образуется определённый тип покупательского поведения, после покупки стадия оценки купленного товара может отсутствовать (Блэкуэлл и др., 2007).

Поскольку у покупателей отсутствует сильная приверженность какой-либо марке, маркетологи для стимулирования спроса используют снижение цен и методы продвижения товара. При рекламировании товаров, характеризующихся низкой степенью вовлечения, следует делать акцент на нескольких ключевых моментах. Большое значение имеют визуальные символы и изображения, поскольку они легко запоминаются и ассоциируются с торговой маркой (Романенкова, 2015). Рекламная кампания должна содержать часто повторяющиеся короткие сообщения. Телевизионная реклама таких товаров эффективнее, чем печатная, поскольку первая больше подходит для пассивного усвоения, посредством которого потребитель формирует своё отношение к товарам с низкой степенью вовлечения (Бест, 2013). Маркетологи могут повысить степень вовлечения, характерную для данного товара, связав этот товар со значимой для потребителей идеей. Правда даже в лучшем случае такая стратегия может поднять уровень вовлечения потребителей с низкого до среднего. Высокого же уровня вовлеченности достичь практически невозможно (Блэкуэлл и др., 2007).

4. Поисковое поведение. Потребители проявляют поисковое покупательское поведение в ситуации, когда низкая степень вовлечения потребителей сопровождается ощутимыми различиями между разными марками товара. В этом случае потребители обычно легко и часто меняют марки. Причиной смены марки является многообразие выбора, а не неудовлетворённость. Для таких категорий товаров маркетинговые стратегии будут разными – для ведущих марок одни, для второстепенных – другие. Лидер рынка будет стараться поощрять привычное покупательское поведение и стремиться к тому, чтобы его продукция занимала лучшие места на прилавках магазинов, и чтобы её всегда было достаточно (Романенкова, 2015). Кроме того, лидер должен использовать напоминающую рекламу. А компании, претендующие на лидерство, следует поощрять поисковое покупательское поведение, предлагая более низкие цены, систему специальных скидок, купоны и бесплатные пробные продукты. Реклама должна убеждать потребителей попробовать нечто новое (Блэкуэлл и др., 2007).

5. Иррациональное поведение. В основе лежат психологические механизмы, лишь косвенно связанные с трезвым расчётом.

Существуют следующие механизмы иррационального поведения (Абрамова, 2018):

1. подражание – многие формы поведения, в том числе потребительского, воспроизводятся людьми без лишних размышлений. В основе лежит механизм подражания. Особенно велика его роль в процессе социализации. Индивид в стандартных ситуациях ведёт себя так, как ведут окружающие. Потребители, стремясь из лени или из здравого смысла экономить свои интеллектуальные силы, идут по пути подражания.

2. заражение – потребители могут при определённых условиях заражаться чужим настроением, заимствуя соответствующие формы поведения. Нередко в группах разного типа встречается механизм взаимного заражения. В этом случае все участники группы заражают друг друга.

3. внушение – метод, способствующий некритическому восприятию внешней информации. Внушать способен тот, кто обладает для данного индивида или группы авторитетом. Чем выше авторитет, тем неопровержимее кажутся доводы внушающего.

Авторы Н. В. Антонова и О. И. Патоша (2017) выделяют несколько постулатов относительно поведения потребителей:

- поведение потребителя целенаправленно;
- потребитель имеет свободу выбора;
- поведение потребителя представляет собою процесс;
- на поведение потребителя можно влиять;
- потребителя необходимо воспитывать.

Об этих аспектах необходимо знать не только аналитикам, занимающимся исследованием рынка, но и всем специалистам, вовлечённым в процесс маркетинга.

Во второй главе первой части работы, автор изучит факторы, влияющие на удовлетворённость потребителей.

Факторы, влияющие на поведение потребителей

Согласно третьему пункту, поведение потребителя является процессом, который автор схематически отобразил на 1.1. рисунке.

Маркетинговые стимулы	Другие стимулы	«Чёрный ящик» покупателя		Реакция покупателя
•Продукт •Цена •Продвижение •Место	•Экономические •Технологические •Политические •Культурные	Личностные характеристики	Процесс принятия решения	•Выбор продукта •Выбор бренда •Выбор продавца •Выбор времени покупки

1.1. рис. Модель процесса поведения потребителей (Источник: Блэкуэлл и др., 2007)

Модель поведения покупателей – это модель реакции покупателей на действие побудительных стимулов маркетинга (Лаптева и др., 2018).

Побудительные стимулы маркетинга включают в себя четыре элемента: товар, цену, методы распространения и продвижения. Прочие стимулы к покупке слагаются из основных факторов из окружения покупателя – экономической, научно-технической, политической и культурной среды. В сознании покупателя эти стимулы вызывают покупательские реакции: выбор товара, предприятия, выбор времени и объема покупки. Сознание каждого покупателя обладает определенными особенностями. Эти особенности – характеристики покупателя, оказывают основное влияние на то, как человек воспринимает стимулы к покупке и реагирует на них. То есть, «Чёрным ящиком» называют этап обработки стимулов потребителей. Эти стимулы влияют и на этапы процесс принятия решения (см. 1.2. рис.).

1.2. рис. Этапы процесса принятия решения о покупке потребителями (Источник: Блэкуэлл и др., 2007)

Этап I. Осознание проблемы. Будущий покупатель чувствует разницу между своим реальным и желаемым состоянием. Нужда может быть вызвана внутренними, а иногда и внешними раздражителями. Обычные человеческие нужды – голод, жажда – возрастают до порогового уровня и превращаются в побуждения. По опыту человек знает, как справиться с этим побуждением, и его мотивация направляется в сторону класса объектов, способных удовлетворить возникшее побуждение. Нужда может быть вызвана внешними раздражителями. Например, женщина проходит мимо булочной, и вид свежеиспеченного хлеба возбуждает у нее чувство голода, или ее приводит в восторг шуба соседки (Бест, 2013).

Этап II. Поиск информации. Потребитель, у которого возникло побуждение приобрести товар, может заняться поиском дополнительной информации. В поиске информации потребитель может обратиться к личным источникам (семья, друзья, знакомые). Используются коммерческие источники (реклама, продавцы, выставки). Информацию предлагают средства массовой информации, организации. Важны источники эмпирического опыта (осязание, изучение, использование товара). Самыми эффективными являются личные источники. Коммерческие источники обычно информируют, личные – узаконивают информацию и дают ей оценку. Комплект осведомленности потребителя составляют знакомые марки товара. Новая информация расширит рамки этого комплекта и поможет отсеять некоторые товарные марки из числа рассматриваемых. Комплект выбора потребителя составляют несколько марок товара, которые отвечают покупательским критериям, остающихся после предварительного отбора. Из этого комплекта и будет сделан окончательный выбор (Антонова & Патоша, 2017). Предприятие должно разработать такой комплекс маркетинга, который вводил бы его товар и в комплект осведомленности, и в комплект выбора потребителя. Источники информации, которыми пользуются потребители, нужно выявлять и определять их ценность (Блэкуэлл и др., 2007).

Этап III. Оценка вариантов. Оценка различных вариантов, составляющих комплект выбора, является основой для принятия решения о покупке. Потребитель рассматривает любой данный товар как определенный набор свойств. Например, для губной помады это цвет, вид упаковки, жирность, престижность, вкус и аромат, а для шины – безопасность, долговечность протектора, плавность хода автомобиля. Эти свойства обычно интересуют всех, но разные потребители считают актуальными для себя разные свойства. Человек обращает больше всего внимания на свойства, которые имеют отношение к его потребности. Характерными являются те свойства, что в первую очередь приходят на ум потребителю, когда его просят подумать о качествах товара. Не следует считать, что они обязательно и являются самыми важными (Блэкуэлл и др., 2007).

Образ марки – это набор убеждений о конкретном фирменном товаре. Потребитель склонен создавать себе набор убеждений о марках товаров, когда каждая отдельная марка характеризуется степенью присутствия в ней каждого отдельного свойства. Убеждения потребителя могут колебаться от знания подлинных свойств по собственному опыту до знаний, являющихся результатом избирательного восприятия и искажения, избирательного запоминания (Блэкуэлл и др., 2007).

Этап IV. Решение о покупке. Это решение принимается на основе ранжирования объектов в комплекте выбора потребителя и отбора наиболее приемлемого варианта. У потребителя формируется намерение совершить покупку наиболее предпочтительного объекта. На решение потребителя могут повлиять еще два фактора. Во-первых, отношения других людей. Степень изменения зависит от интенсивности отношения другого лица к предпочтительному варианту потребителя и готовности потребителя принять пожелания другого лица. Во-вторых, намерение совершить покупку оказывается также под воздействием непредвиденных факторов. Например, кража кошелька может заставить отказаться от покупки (Блэкуэлл и др., 2007).

Этап V. Реакция на покупку. Купив товар, потребитель может испытывать удовлетворенность или неудовлетворенность покупкой. Степень удовлетворенности покупкой определяется соотношением между ожиданиями потребителя и воспринимаемыми свойствами товара. Если товар соответствует ожиданиям, потребитель удовлетворен, если превышает их, то потребитель весьма удовлетворен, если не соответствует им, то потребитель неудовлетворен. Удовлетворенность товаром отразится на последующем поведении потребителя. В случае удовлетворения он, вероятно, купит товар и в следующий раз. Удовлетворенный потребитель склонен делиться благоприятными отзывами о товаре с другими людьми. Недовольные потребители могут перестать приобретать данный товар в будущем, высказать свое неблагоприятное впечатление о нем друзьям и знакомым, обратиться в суд. Если потребитель приспособит товар для использования в каких-то новых целях, то продавца это должно заинтересовать, поскольку данное обстоятельство можно обыграть в рекламе. Если потребитель откладывает товар про запас, почти не пользуется им или избавляется от него, это означает, что товар не очень устраивает его. Интересно и то, как потребитель избавится от товара. Если он продаст его или обменяет, то это снизит объем продаж товара (Блэкуэлл и др., 2007).

Потребители принимают свои решения не в вакууме. На совершаемые ими покупки большое влияние оказывают факторы культурного, социального, личного и психологического порядка. В большинстве своем это факторы, не поддающиеся контролю со стороны деятелей рынка.
Самое большое и глубокое влияние на поведение потребителя оказывают факторы культурного уровня. Культура – основная первопричина, определяющая потребности и поведение человека. Ребенок усваивает базовый набор ценностей, восприятий, предпочтений, манер и поступков, характерных для его семьи и основных институтов общества. Так, ребенок, растущий в Америке, знакомится или сталкивается со следующими ценностными представлениями: свершение и успех, активность, работоспособность и практичность, движение вперед, материальный комфорт, индивидуализм, свобода, внешний комфорт.

Почти в каждом обществе существуют различные общественные классы, которые определяются следующим образом: общественные классы – сравнительно стабильные группы в рамках общества, располагающиеся в иерархическом порядке и характеризующиеся наличием у их членов схожих ценностных представлений, интересов и поведения (Kasiria и др., 2017). Общественным классам присуще несколько характеристик:

1. лица, принадлежащие к одному и тому же классу, склонны вести себя почти одинаково;

2. в зависимости от принадлежности к тому или иному классу люди занимают более высокое или более низкое положение в обществе;

3. общественный класс определяется не на основе какой-то одной переменной, а на основе занятий, доходов, богатства, образования, ценностной ориентации и тому подобных характеристик принадлежащих к нему лиц;

4. индивиды могут переходить в более высокий класс или опускаться в один из нижних классов. Для общественных классов характерны явные предпочтения товаров и марок в одежде, хозяйственных принадлежностях, проведении досуга, автомобилях (Антонова & Патоша, 2017).

Так же на выбор покупателя оказывает влияние его ближайшее окружение: друзья, коллеги по работе, члены семьи. При покупки какого-то продукта, особенно если эта покупка совершается редко либо первый раз, человек попытается узнать о цене, качестве товара, месте его продажи и наиболее просто это сделать – спросить у окружающих его людей, большее влияние оказывают естественно те, которые пользуются уважением в конкретной группе людей. Кроме того, у человека складывается определенное положительное или отрицательное мнение о том или ином товаре или фирме по услышанному от других, которое в будущем, возможно, повлияет на его выбор (Бест, 2013).

На покупателя так же влияют личностные факторы: род занятий, экономическое положение, образ жизни и т.д. При определенном роде занятий у человека может возникнуть желание заниматься каким-то еще делом, совершенно не связанным с его повседневными делами или наоборот, дополняющим его занятия. Пример: увлечение каким-либо хобби (рыбная ловля, чтение детективов) помогает человеку расслабиться, но это приводит к покупке необходимых ему при этом товаров (удочка, книги).

Результаты исследования

Динамика развития текстильной промышленности в Узбекистане

Текстильная и швейно-трикотажная промышленность Узбекистана является одной из ведущих и динамично развивающих отраслей. Она играет существенную роль в решении государственных задач и отвечает жизненно важным интересам многих регионов. Содействует гармоничному развитию регионов, обеспечению занятости населения и улучшению его благосостояния, оказывает помощь в становлении и развития малого и частного бизнеса. Важнейшим направлением наших внутренних резервов и возможностей стало поэтапное увеличение глубины переработки отечественных сырьевых ресурсов, а также расширение объемов и номенклатуры производства продукции с высокой добавленной стоимостью (Текстильная промышленность, 2019).

За прошедшие 27 лет отрасль стала одним из лидеров и в привлечении иностранных инвестиций, и в области экспорта продукции с высокой добавленной стоимостью. Сегодня индустрия представлена широким экспортным ассортиментом – от пряжи до готовых швейных и трикотажных изделий. Ежегодный рост объемов производства отрасли за последние годы составил примерно 18%, а экспорта – 10% (Текстильная промышленность, 2019).

По состоянию на 1 января 2019 года в системе Ассоциации «Узтекстильпром» функционировало 1512 промышленных предприятий, из них 369 предприятия текстильной отрасли и 1143 предприятий швейно-трикотажной отрасли. В том числе 29 крупных предприятий, 1 483 предприятий отнесенных к категории субъектов малого и частного бизнеса. Предприятия Ассоциации также производят и другие изделия широкой номенклатуры и ассортимента специфического профиля, в том числе производят товары медицинского назначения, нетканые материалы, удовлетворяя потребность в ватной продукции, специальной рабочей одежде, махровых изделиях, а также обеспечивают разработку и внедрение в производство продукции нового поколения – новых инновационных продуктов (Текстильная промышленность, 2019).

Наибольший прирост добавленной стоимости в цепочке производства текстильной отрасли из хлопка имеется в сфере пошива готовых трикотажных и швейных изделий.

В свете выполнения поставленных задач, акционерные общества и предприятия Ассоциации в 2018 году обеспечили производство товаров народного потребления на 7.5 трлн. сум, темп роста к соответствующему периоду прошлого года составил 128.6%, объем производства промышленной продукции составил 13.2 трлн. сум с темпом роста 116.5% (Текстильная промышленность, 2019).

Основной акцент был направлен на увеличение производства готовой продукции с высокой прибавочной стоимостью, удельный вес которой в 2018 году превысил 57% в общем объеме промышленного производства, против 52% в 2017 году (Текстильная промышленность, 2019).

Виды продукции текстильной и швейно-трикотажной промышленности Узбекистана и объём её производства автор отобразил на рисунке 2.1.

2.1. рис. Виды и объём производства продукции текстильной и швейно-трикотажной промышленности Узбекистана (Источник: Текстильная промышленность, 2019)

Исходя из важного значения текстильной отрасли для экономического развития страны, в Узбекистане реализуется Программа мер по дальнейшему развитию текстильной и швейно-трикотажной промышленности на 2017-2025 годы. Согласно Программе, к 2022 году выпуск хлопчатобумажной пряжи планируется увеличить в 2.5 раза, готовых тканей – в 2.8 раза, шелковых тканей – в 2.7 раза, нетканых материалов – в 1.5 раза, трикотажного полотна – в 2.7 раза. Планируется увеличение выпуска швейных изделий в 3.2 раза, трикотажных изделий в 2.1 раза, производство шелка-сырца в 2.1 раза. Если объем производства тканей в 2011 году составил 85.63 млн. кв. метров, то согласно прогнозу экспертов Агентства по привлечению иностранных инвестиций в 2022 году этот показатель превысит 459.2 млн. кв. метров, обеспечив рост объема производства в 5.4 раза.

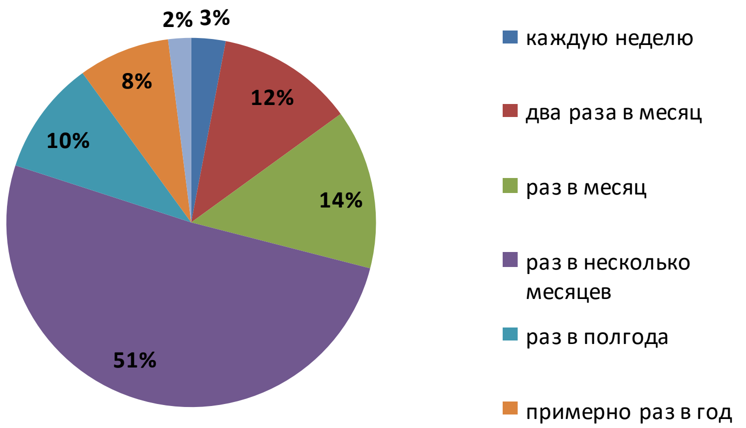
При этом 300 текстильных компаний создано с участием иностранных инвесторов, из таких стран, как Китай, Южная Корея, Россия, Индия, Сингапур, Германия, Швейцария и другие.

Выбор потребителей брэндов одежды в Узбекистане

Во второй главе работы автор изучит факторы, влияющие на выбор респондентами брэндов покупаемой одежды в Узбекистане. Для этого автор провёл анкетирование.

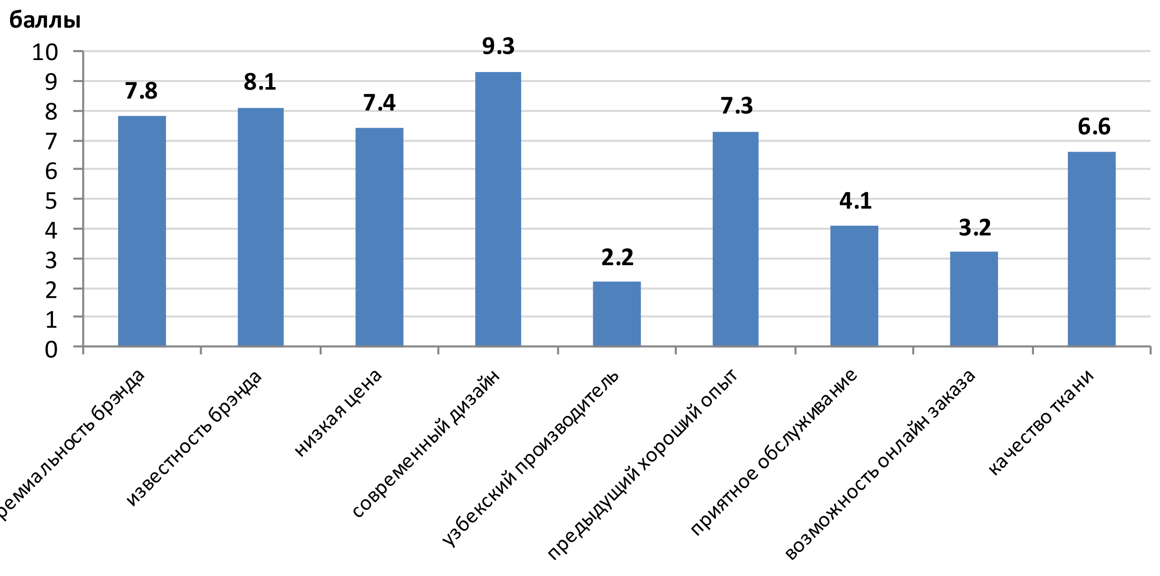
Анкета (приложение 1) была разработана в декабре 2019 года, а опрос респондентов автор провёл 20-25 января 2020 года. Генеральной совокупностью исследования должны являться все жители Узбекистана, но автор из-за ограничений во времени и финансах смог опросить только знакомых и друзей в Ташкенте, разослав им ссылку на электронный опрос. Всего анкету заполнили 83 респондента. Из них 56% женщин и соответственно 44% мужчин. Средний возраст респондентов 24 года. Среди опрошенных 98% живёт в Ташкенте.

Первый вопрос «*Обращаете ли вы внимание на брэнд покупаемой одежды?*» автор специально сформулировал его так, чтобы он был не сложным и респондентам не захотелось бы кинуть заполнение анкеты сразу же. На этот вопрос 81% респондентов ответили положительно. Второй вопрос тоже был не сложным. С его помощью автор хотел узнать, как часто респонденты покупают одежду. Распределение ответов представлено на рисунке 2.2.



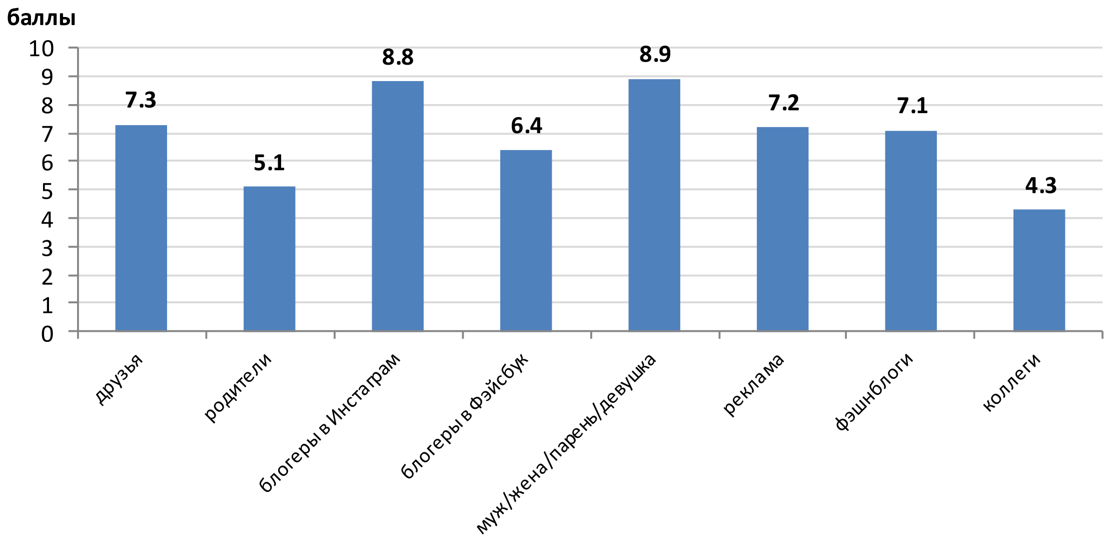
2.2. рис. Распределение ответов респондентов о частоте покупки одежды, n=83 (Источник: обобщение автора)

Следующий вопрос «*Оцените степень важности характеристик, влияющих на ваш выбор брэнда одежды*» автор предусмотрел в анкете для выявления факторов, влияющих на выбор. Средние оценки важности отображены на 2.3. рисунке. Современный дизайн (x=9.3) и известность брэнда (x=8.1) являются самыми важными характеристиками, влияющими на выбор одежды.



2.3. рис. Средняя оценка респондентов важности характеристик, влияющих на ваш выбор одежды, n=83 (Источник: обобщение автора)

Наименее важными характеристиками являются местное производство (x=2.2), возможность заказать одежду онлайн (x=3.2), а также приятное обслуживание в магазине (x=4.1).
При помощи четвёртого вопроса автор хотел узнать, кто из окружения респондентов формируют их выбор одежды. Средние оценки представлены на 2.4. рисунке.



2.4. рис. Средняя оценка респондентов факторов, формирующих выбор одежды, n=83 (Источник: обобщение автора)

Наиболее влияющим окружением оказались партнёры (муж/жена/парень/девушка) (x=8.9) респондентов и блогеры в соцсети *Instagram* (x=8.8). Наименее влияющими оказались родители (x=5.1) и коллеги (x=4.3).

Пятый «*Оцените, пожалуйста, важность премиальности брэнда покупаемой одежды*» и шестой «*Оцените, насколько вы в среднем оцениваете премиальность своего гардероба*» автор разработал с целью сравнить средние оценки ответов. Таким образом, в среднем респонденты важность премиальности брэнда оценили на 7.8. В свою очередь средняя оценка гардероба равняется 3.6. То есть, разница между действительностью и желанием равняется 4.2. баллам. Это также подтверждается ответами на вопрос о материальном обеспечении.

Большинство респондентов ответили (58%), что их дохода достаточно для приобретения необходимых продуктов питания и одежды, но на более крупные покупки приходится откладывать (см. 2.5. рис.).

2.5. рис. Распределение респондентов по уровню материальной обеспеченности, n=83 (Источник: обобщение автора)

У 14% респондентов денег хватает только на приобретение продуктов питания и только у 2% респондентов есть возможность приобретать одежду премиальных брэндов.

Рекомендации по возможному использованию данных исследования автор предоставляет в следующей части этой работы.

Выводы

Основываясь на результатах исследования, автор пришёл к следующим выводам:

1. Ежегодный рост объемов производства текстильной и швейно-трикотажной отрасли за 2017-2019 годы составил примерно 18%, а экспорта – 10%.
2. Предприятия ассоциации «Узтекстильпром» в 2018 году обеспечили производство товаров народного потребления на 7.5 трлн. сум, темп роста к соответствующему периоду прошлого года составил 128.6%, объем производства промышленной продукции составил 13.2 трлн. сум с темпом роста 116.5%
3. Около 300 текстильных компаний в Узбекистане создано с участием иностранных инвесторов, из таких стран, как Китай, Южная Корея, Россия, Индия, Сингапур, Германия, Швейцария и другие.
4. Современный дизайн (x=9.3) и известность брэнда (x=8.1) являются самыми важными характеристиками, влияющими на выбор одежды респондентов. Наименее важными характеристиками являются местное производство (x=2.2), возможность заказать одежду онлайн (x=3.2), а также приятное обслуживание в магазине (x=4.1).
5. Наиболее влияющим окружением оказались партнёры (x=8.9) респондентов и блогеры в соцсети Instagram (x=8.8). Наименее влияющими оказались родители (x=5.1) и коллеги (x=4.3).
6. Разница между премиальностью гардероба и важностью фактора премиальности одежды при её выборе равняется 4.2. баллам.

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1 приложение

Анкета для опроса респондентов

Уважаемый респондент!
Просим вас принять участие в исследования Высшей школы экономики и культуры в Латвии, цель которого – выявить факторы, влияющий на ваш выбор одежды. Ваши ответы будут использованы только в обобщённом виде. Конфиденциальность ответов гарантирована. Время заполнения анкеты 5 минут.

1. Обращаете ли вы внимание на брэнд покупаемой одежды?
   - ☐ да
   - ☐ нет (спасибо! опрос закончен)

2. Как часто вы покупаете одежду:
   - ☐ каждую неделю
   - ☐ два раза в месяц
   - ☐ раз в месяц
   - ☐ раз в несколько месяцев
   - ☐ раз в полгода
   - ☐ примерно раз в год
   - ☐ не покупаю

3. Оцените степень важности характеристик, влияющих на ваш выбор одежды:
   - ☐ премиальность брэнда 1 2 3 4 5 6 7 8 9 10
   - ☐ известность брэнда 1 2 3 4 5 6 7 8 9 10
   - ☐ низкая цена 1 2 3 4 5 6 7 8 9 10
   - ☐ современный дизайн 1 2 3 4 5 6 7 8 9 10
   - ☐ отечественный производитель 1 2 3 4 5 6 7 8 9 10
   - ☐ предыдущий положительный опыт с брэндом 1 2 3 4 5 6 7 8 9 10
   - ☐ приятное обслуживание в магазине 1 2 3 4 5 6 7 8 9 10
   - ☐ возможность заказать по интернету 1 2 3 4 5 6 7 8 9 10
   - ☐ качество ткани 1 2 3 4 5 6 7 8 9 10

4. Насколько на ваш выбор влияют:
   - ☐ друзья 1 2 3 4 5 6 7 8 9 10
   - ☐ родители 1 2 3 4 5 6 7 8 9 10
   - ☐ блогеры в Инстаграм 1 2 3 4 5 6 7 8 9 10 (нет этой соцсети)
   - ☐ блогеры в Фэйсбук 1 2 3 4 5 6 7 8 9 10 (нет этой соцсети)
   - ☐ партнёр (муж/жена/парень/девушка) 1 2 3 4 5 6 7 8 9 10 (нет партнёра)
   - ☐ реклама 1 2 3 4 5 6 7 8 9 10

5. Оцените, пожалуйста, важность премиальности брэнда покупаемой одежды

|__|__|__|__|__|__|__|__|__|__|
1 2 3 4 5 6 7 8 9 10

совсем не важно очень важно

6. Оцените, насколько вы в среднем оцениваете премиальность своего гардероба

|__|__|__|__|__|__|__|__|__|__|
1 2 3 4 5 6 7 8 9 10

совсем не премиальный полностью премиальный

7. Если бы вы не были ограничены в деньгах, одежду каких брэндов вы бы покупали?

____

8. Ваш пол:
- мужской
- женский

9. Сколько вам лет? ______________________

10. Укажите, пожалуйста, к какой из следующих категорий по уровню материальной обеспеченности Вы можете отнести свою семью?
- денег хватает только на приобретение продуктов питания
- денег достаточно для приобретения необходимых продуктов питания и одежды, но на более крупные покупки приходится откладывать
- покупка большинства товаров длительного пользования (холодильник, телевизор) не вызывает трудностей, однако купить автомобиль или квартиру мы не можем
- денег хватает на то, чтобы ни в чем себе не отказывать

Благодарим за участие в опросе!

Erkaiym Omurbekova. FACTORS AFFECTING CONSUMERS' CHOICE IN THE MOBILE GAMES MARKET IN LATVIA

EKA University of Applied sciences, Management, eomurbekova112@gmail.com

Scientific advisor: Dr. oec., Assistant Professor. Ksenija Ijevļeva

Abstract

Research relevance: Mobile gaming for the last decades takes a larger market share than PC gaming with a quota of $36,9 billion, up 21,3% globally. Smartphones and tablets combined will account for 51% of the Global market. Thus, mobile games have posted growth in the past decade and this is likely to hold for the next foreseeable future. For game developer companies in order to attain commercial success, it is important the understanding of consumer behaviour, which plays a huge role. Consumer purchasing behaviour tends to determine what exactly is driving the choices of consumers during purchasing/buying decision processes.

Research goal: is to identify the factors affecting consumers' choice in the mobile games market in Latvia.

Research methods: In order to study, was gathered the information such as statistical data and indicators from various official databases, reports. Literature analysis was used for gathering theoretical thoughts on current numbers of gaming market. Graphic analysis and methods of descriptive statistics were used as a data processing method. The study was carried in line with the proposed guidelines for collecting and interpreting data according to EKA University of Applied Sciences general provisions.

Main findings: In the last part of the Research Paper, author created conclusions and proposals for strategy development tools for better reach of mobile games users.

Keywords: Game industry; business model; monetization; consumer behaviour.

Introduction

One of the leisure forms in the last 20th and 21st centuries, truly considered to be the expansion and development of gaming, which within these decades was on the constant renewal and modernization. In recent years, there has been a transformation in the way people how they think about the games. If in the past, the main target group were mainly young teenagers, now, it has much bigger market coverage.

One of the results of the changes in the game industry is what was dubbed by Jesper Juul in his work Casual Revolution, "a breakthrough moment in the history of video games". This revolution is a process in which digital games have become more normal and part of people's daily routines (De la Hera, 2019).

Mobile gaming for the last decades takes a larger market share than PC gaming with a quota of $36,9 billion, up 21,3% globally (Kunnskapsverket, 2017).

Smartphones and tablets combined will account for 51% of the global market. Thus, mobile games have posted growth in the past decade and this is likely to hold for the next foreseeable future (Stillfront, 2019).

Latvian game industry belongs to the young and emerging game industry within the Baltic Sea Region. In the last 4 years, there has been a slow steady rise in both turnover and profit of game development companies in Latvia, thanks to the input of smartphone game developers (Baltic Game Industry, 2020).

The main feature of smartphones is their high level of accessibility to the user. Therefore, customers have a preference to switch to the quickly downloadable games to the smartphone, which is easy to play and lend themselves to being played in short sessions throughout the day.

Moreover, games are played by almost every demographic stratum of society (Kaplan, 2019). As a result in the gaming industry, the smartphone or mobile ecosystem is getting increased attention and investment.

For game developer companies in order to attain commercial success, it is important the understanding of consumer behaviour, which plays a huge role. Consumer purchasing behaviour tends to determine what exactly is driving the choices of consumers during purchasing/buying decision processes. The knowledge of consumer behaviour helps to understand how consumers think, feel and select their alternatives in products, brands and how the consumers are influenced by their environment, the groups, family, sales and etc. There are factors, such as social, technological, political, economic and personal which affects consumer behaviour. This information is required for companies to better perform their marketing activities and cost-effectively as possible.

The aim of the Research Paper is to identify the factors affecting consumers' choice in the mobile games market in Latvia.

For the purpose of this study information such as statistical data and indicators from various official databases as well as reports were gathered. Literature analysis was used for gathering theoretical thoughts on the current gaming market's numbers. Graphic analysis and methods of descriptive statistics were used as a data processing method.

Thus, the author has chosen mobile gaming as a research subject on the thesis due to own scientific interest and familiarity with this gaming environment, and willing to establish the cluster of factors which affect game users' choices.

Literature review

Today, many markets are changing to the global market, thus, it has brought a variety of opportunities and challenges, and the markets are facing more challenges even before, due to the rapid technological advancements like for example shopping online and this fast developing economy has completely changed people's lifestyle.

With the development of consumer society, the concept of corporate management is getting more concerned about the changes in the behaviour of consumers. Thus, "a good market researcher will study the thought process undergone by consumers, compare it with their demographic data, and use the resulting information to market their products" (UK Essays, 2018).

The knowledge of consumer behaviour helps the marketer to understand how consumers think, feel and select products, services, and brands and how consumers are influenced by their environment, the reference groups, family, and salespeople and so on.

A consumer's buying behaviour is influenced by situational, cultural, social, personal and psychological factors. Most of the listed factors directly influence the process of purchasing decisions on the part of the consumer, on the other hand, these factors uncontrollable and beyond the hands of marketers and sellers. Nevertheless, they have to be considered while trying to understand the complex behaviour of the consumers (Einflussfaktoren des Kaufverhaltens [online]).

Business models which are used in the commercializing of video games are evolving constantly to fully adapt to the needs and preferences of users in various areas such as: platforms (via the Web browser, mobile applications, etc.), forms of payment (paying per download, subscription, game extensions, payment for access etc.) or gaming devices (game consoles, computers, smartphones, tablets, etc.) .

One of the crucial main factors that turns the production of the game to a project which sustainable over the time, capitalize the effort in design, development, marketing and distribution of the game is monetization. Currently, different business models are being applied, combined to suit different user profiles of the same game (Kunnskapsverket, 2017).

Research methodology

For the purpose of this study data collection methods, as a secondary data analysis, statistical data and indicators from various official databases as well as reports were gathered. Literature analysis was used for gathering theoretical thoughts on analyzing consumers' choice theory and the current gaming market's numbers.

Graphic analysis, methods of inferential statistics and methods of descriptive statistics, such as calculation of average values were used as a data processing method.

To identify, the factors affecting consumers' choices of mobile game users, the author developed a questionnaire. The questionnaire was published in English and Russian languages. The questions in the questionnaire were based on the theory of factors affecting consumers' decision-making process. The questionnaire included a series of multiple-choice questions, which were integrated into the Likert scale, which helps to analyze data by such statistical methods as descriptive statistics and correlation analysis.

The questionnaire was developed in March-April 2020, the collection of survey results has taken from 4th of April until 6th of May 2020. An anonymous survey involved 160 respondents and general population of the study is all consumers of mobile games in Latvia. However, the author was limited in finances and time, so survey was conducted in an online environment, which is not enough to provide a representative of the general population.

As the scope of the research, the investigation of consumer choice was applied for the category of mobile games segment, not including PC and consoles segments.

Research results

According to the data from Newzoo Global Games Market Report, Latvian video games market in terms of sales per capita takes 42nd place. Data shows that Latvian residents spend an average of 13, 5 Euro a year. Results are similar to the other Baltic States. Estonia's results are the highest among the three Baltic States with 16 Euro per capita (Ciunale, 2016).

Revenue in the Latvian Mobile Games market segment amounts to 2 million Euro in 2020. User penetration is 14,9 % in 2020 and is expected to hit 15,4 % by 2024. In global comparison, most revenue is generated in China with 17,679 million Euro in 2020 (Statista, [online]). With the use of linear regression, the author investigated the revenue growth for Mobile games in the next years in million euros. Calculation of forecasting and the visual graphic was used with the Excel program.

The linear regression formula is the following equation Y=a+bx, where:

Y= forecast value

A and B- parameters that the author recognized using the Trend line function

X- the ordinal number in the time series

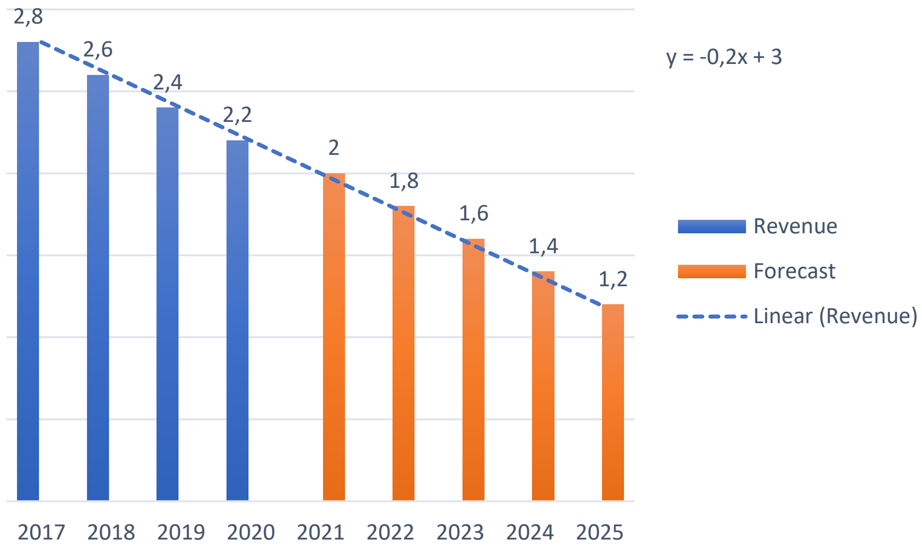

Fig. 1. Dynamics of revenue growth of Mobile games segment in Latvia 2017-2020 and its linear forecast for 2021-2025, in mln. € (Source: author's compilation of data statista, 2020)

In order to access the influence of environment to the player, as social factors, the author interested to evaluate how much consumers are affected by the sources of information received about games from their family members, friends, and etc. and how much of importance they give to these factors.

Table 1. The central tendency of consumers' assessment on the degree of importance of sources in getting information while choosing a game and the correlation between them and age (Source: author's summary)

Factors	**x**	**Mo**	**Me**	**r**
Family	4,89	1	5	0,211
Friends	6,71	7	7	0,194
Classmates/Group mates	5,51	8	6	0,195
Colleagues	5,99	8	7	0,181
Social media	5,81	7	6,5	0,197
Bloggers	4,66	1	5	0,236
Recommendations from Google Play/ App Store	6,74	8	8	0,205
Ratings	6,93	8	8	0,177

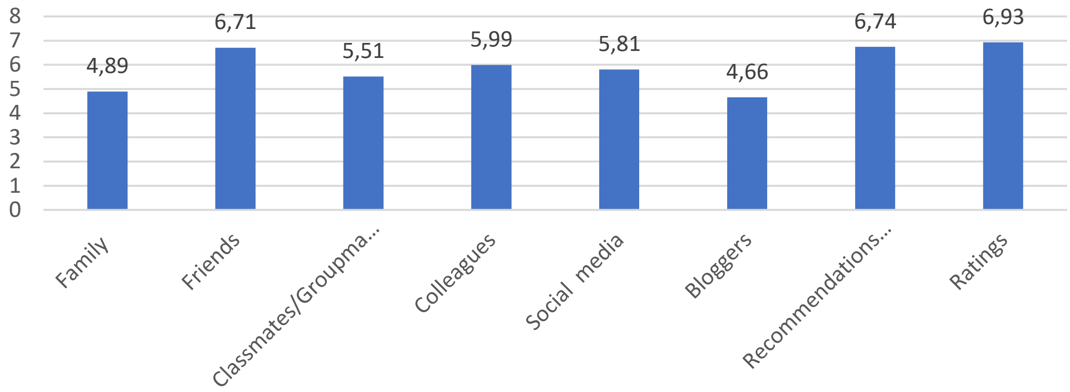

Fig. 2. The importance level of sources in getting information about mobile games (Source: author's summary)

As shown in Figure 2 and Table 1, the most important sources of information about games, players receive from "Ratings" with 6.93 points, next from "Recommendations from Google Play/ App Store" with 6.74 points, 6.71 points the information received from friends, 5.99 points accounts for colleagues.

Moving to the next factors, shown in Table 2 and Figure 3, most of the respondents participated in the survey, give the main importance to the factors such Content / Strategy of a game with 8.31 points and Design of the game with 8.40 points. Those factors mainly based on models about player profiles of various experts such as Bartle, Marczewski, where these authors have defined the different types of players, such as *Socializers, Killers, Achievers and etc.*

The author considers, that depending on the type of player's profile, consumers give the highest importance to the factor "Content/Strategy of a game", but at the same time, it means, players seek for different genres, content style depending on their own interest and experience.

The next factors, which plays a role in selecting games during the decision-making process of a consumer are "Availability of game", which underlines the possibility of a free game, or in-game purchases with 7. 61 points. Here again, the consumer looks after "Content/Strategy of a game" and "Design of the game" to own willingness to continue the experience with the game. If a game will captivate the attention of a player, it gives the greater possibility of spending money on it.

Factors "Free period of extended version" accounts 6.67 points, "Image of the game developer (new games or versions from the developer)" is 6.27 points, "Promotion" is 5.86 and lastly "Advertisement" takes 5.54 points.

Table 2. The central tendency of consumers' assessment on the degree of importance of factors affecting the choice while choosing a game and the correlation between them and age (Source: author's summary)

Factors	**x**	**Mo**	**Me**	**r**
Content/ strategy of a game	8,31	8	8	0,184
Image of the game developer	6,27	7	7	0,205
Promotion	5,86	7	7	0,222
Advertisements	5,54	1	6	0,218
Availability of game	7,61	8	8	0,194
Free period of using extended version	6,67	10	7	0,222
Design of the game	8,40	10	8,5	0,164

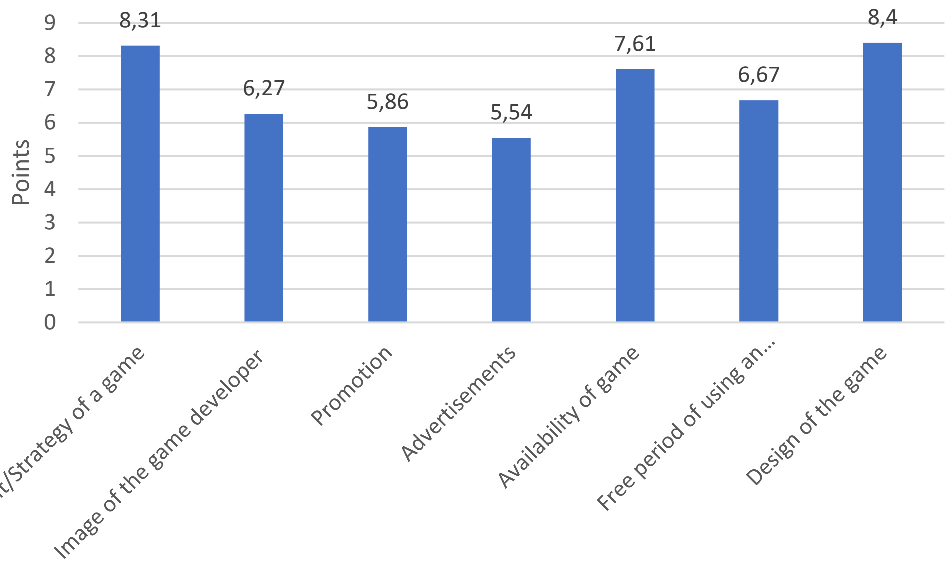

Fig. 3. The factors affecting selecting mobile games during purchasing behavior (Source: author's summary)

Summarizing the results, the author has concluded that several factors, such as cultural, psychological, personal, demographic, social affect the purchasing behaviour of a consumer. Moreover, characterizing the consumer choices of mobile gamers, models player profiles, identifying motives of playing games and finding suitable/ appropriate monetization approaches are key factors.

Conclusions

Analyzing the whole Latvian mobile game industry, the Latvian game market, the market is still in the growing phase with available 61 game enterprises and 450 game developers. For these game enterprises to move to a new level, they need to come up with new catchy, attractive games for users.

According to the results of research, most respondents indicated that they are interested and ready to play, experience different genres of games (action games, strategy games, logic games, educational games, etc.), and on the first place with the greatest importance comes the factor of "Content/Strategy of the game".

According to the results, the respondents have chosen important factors "Recommendations from Google Play/App Store" and "Ratings. This means that game developers need to put more advertisements about the games on these platforms. It can be implemented by using monetization approaches, such as (Pay-to-Play, Freemium), thus, consumers can see the availability of games and following their preferences to choose games for playing.

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Abidjanov Janobidin. TRUCK LOGISTICS DEVELOPMENT POSSIBILITIES BETWEEN EUROPE AND ASIA

EKA University of Applied sciences, Management, janobiddin.abidjanov@gmail.com

Scientific advisor: Dr.oec., Professor Vita Zarina

Abstract

Research Relevance: Considering the data in regard to Uzbekistan's exports, it can be seen that 58.1 % of products transported by road haulage, since Uzbekistan is a land-locked central Asian country, with no direct access to open sea ports. With the data gathered here on export logistics, analysts and strategists may be able to use new findings in this study of Uzbek truck logistics, and thus these new ideas may become more common and successful where implemented. Additionally, with the newly elected Uzbek president, the relationship between Uzbekistan and Europe is developing rapidly and indicates that an increasing number of transportation and product changing innovations may now be possible.

Research Goal: In this study, the research goal will be: To determine the viability of the creation of a warehouse and transport hub for European Union member states in order to increase the export potential of Uzbek truck logistics.

Research Methodology: Based on the major methodological issues associated with existing research, the data will be largely collected through three main sources, namely:

- Literature review - for supporting this bachelor thesis background;
- Self-completion questionnaires – to explore the possible versions in the system of logistic transformation through Uzbekistan and European member countries;
- Semi-structured interviews – with two managers of Uzbek companies who are interested in new logistics with the EU.

Main Findings: The survey questionnaires revealed a good proportion of interest for bulk transport of palletised goods, with part or full load drop-offs. Additionally, single- and multi-point bulk-dry and bulk-liquid road deliveries, also indicated strong interest, with even an immediate demand to deliver domestic fuel oil to Greece. Another area of significant interest was for faster and more available courier-style services, to multiple distributor points and multi-point door-to-door European address deliveries. There were opinions aired and research suggests that Uzbek logistical services are good and trading prosperously, but there was room for improvement and opportunities for better or more dedicated services, especially contract services designed for individual companies. Further research is required to determine the actual validity of new innovative logistical services, with complete market, logistical and financial analysis of specific and tangible scenarios that can be applied and offered to real clients in Uzbekistan and co-operative partners in Europe.

Keywords: Uzbekistan Logistics; Uzbekistan Trucks, Uzbek Supply Chains, Asia Warehouse Logistics, Asia Supply Locations, Uzbek Export Logistics.

Introduction

The goal of this research is to determine the viability of the creation of a warehouse and transport hub for European Union member states in order to increase the export potential of Uzbek truck logistics. Uzbek logistics businesses and services, provide 11.2% of national GDP providing $23.1bn in revenues from 39,344 commercial vehicles, according to REF (DATE). This is a good national basis to take advantage of the new political relationships forming between the new president of Uzbekistan and the European Union, which are set to provide new trading opportunities and thus increased demand for Uzbek logistics.

A good example of an Uzbek logistics business is Company **ЧП Karavan logistic group**, who are interested in expanding their operations from Russia and Azerbaijan to include the Baltic States (Lithuania, Latvia and Estonia) and other European transport hubs and parts. Company **ЧП Karavan logistic group** kindly offered their clients as participants in the self-completion survey described in the research methodology and offered much help in the creation or the questions and analysis of the results. It is clear however, the ambitions identified by Company **ЧП Karavan logistic group** are just a snapshot of the Europe-wide opportunities that are arising for several Uzbek logistics companies given those new and exciting connections.

Perhaps the most important aspect of Uzbek trade and logistics will be exports, but with trucks having delivered their goods to European destinations, the most profitable businesses will be those who can fill their returning empty trucks with full payloads for import. Thus, the connections that logistics companies must make are also European importers, who wish to send goods into Uzbekistan.

Literature Review

It is important to discuss the influence of the government on the major logistics processes in Uzbekistan. Recently, there has been a noticeable tendency to expand the scale of government intervention and to strengthen its role in the economic sphere (Meier, 1988). This is due to the widespread development of a competitive market mechanism, which is subject to adjustment and needs conditions for its free functioning. Underestimation of the economic role of the state gives rise to negative consequences. State regulation of the economy - a set of measures, actions used by the state for corrections and the establishment of basic economic processes (Mama *et al.,* 2018). In other words, state regulation is a process aimed at improving the economic and social life of a country.

If we talk about the Republic of Uzbekistan, we can distinguish three main tasks that are solved in the course of state regulation of the economy. Макушина (2017) notes that these are: the achievement of stable economic growth that serves the purpose of improving the welfare of the population; improving the country's economic system in order to increase efficiency; and the protection of national interests internationally.

In the Republic of Uzbekistan, many large investment projects are underway to build and reconstruct railways and roads, upgrade the fleet and modernize locomotives and rolling stock, build airports, develop the infrastructure of the free industrial zones of the Republic of Uzbekistan, and develop a system of multimodal transport and logistics centers for the development of the system of transport corridors, the formation and development of the market of freight forwarding, warehouse and other logistics services, the development of high-speed rail, and more (Shermukhamedov & Abirova, 2015a). This helps to overcome the significant "economic distance" that separates Uzbekistan from the world markets for goods and services, since the "economic distance" is the sum of all time and material costs incurred in the process of delivering goods to foreign markets, optimization and cost reduction issues the movement of goods, as well as the construction of a competent supply chain, for Uzbekistan is a determining factor in its economic development (Shermukhamedov& Abirova, 2015a).

By the decision of the Government of the Republic of Uzbekistan, the joint venture UzVneshTrans LLC and the Ministry of Foreign Economic Relations, Investments and Trade of the Republic of Uzbekistan are developing the creation of an international logistics center using European and international standards and know-how in the Surkhandarya region (Shermukhamedov& Abirova, 2015b). The project with a total cost of $ 10.4 million will be financed through a grant of the European Union Commission in the amount of $ 2.6 million and funds from the Uzbek side - $ 7.8 million (Shermukhamedov& Abirova, 2015b). The document stipulates that the EU funds will be used to improve transport and logistics infrastructure tours, the organization of training seminars in European countries, as well as the supply of materials and equipment for the construction of storage facilities and a car repair shop, freezers, storage equipment (Shermukhamedov *et al.*, 2014). The Uzbek side will finance construction and installation work, the purchase of materials and equipment for the warehouse of a car repair shop, freezers, storage equipment, training and retraining of qualified specialists. The creation of an international logistics center in the Surkhandarya region contributes to an increase in the volume of Uzbek-Afghan trade (Шермухамедов, 2017). The international logistics center in Tashkent provides a full range of services for processing, storage, customs clearance, transportation of goods, including the work will be organized on a door-to-door basis (Шермухамедов, 2017).

It can be concluded that the government of the Republic of Uzbekistan is interested in creation of the European logistics hub in the country and subsidies are available for involved parties, which adds to the viability of the proposed business idea.

Research Methodology

Using self-completion questionnaires and semi-structured interviews, to explore the possible logistical opportunities and factors involved with road transportation from Uzbekistan to European member states and possible return journeys.

Self-completion questionnaires were submitted to 38 customers of logistics firm Company X and each contained six questions which could be answered 'Yes', 'No' or 'Maybe' and multi-choice answers. The questions were as follows:

Q.1 - Would you use premium logistics services, if they were designed just for your needs? Answer yes, no, maybe.

Q.2 - Would you use new logistics services at below average prices, but with slower, more relaxed delivery times? Answer yes, no, maybe.

Q.3 - Would you use new logistics services at above average prices, but with faster, less flexible delivery times? Answer yes, no, maybe.

Q.4 - Would you use new single-point bulk delivery services to/from Europe for palletised, bulk-dry, bulk-liquid, small-packets, large/heavy items, no bulk single-point now but possible, or no bulk single-point at all?

Q.5 - Would you use new multi-point bulk delivery services to/from Europe for palletised, bulk-dry, bulk-liquid, small-packets, large/heavy items, or none of the above?

Q.6 - Would you regularly use new multi-point courier van services to/from Europe for small/light packages? Answer yes, no, maybe.

Interviews with the managers of two international companies in Uzbekistan, who already trade with Europe (Company A and Company B), to find out if they are likely to use new innovative Uzbek logistical services.

Research results

Self-completion Questionnaires

Firstly in summary, the results of the 38 self-completion questionnaires revealed that 36% of those answering Q.1 would indeed use premium logistics services, if such a service was designed just for their needs.

For Q.2, a healthy 71% of customers would consider new logistics services that reduced cost, but slower, more relaxed delivery times.

Asking customers Q.3, if they would pay more than average for logistics services that were faster and had more specific delivery times, attracted a positive score of 47%.

Answers to Q.4 indicated that 29% of clients would be interested in palletised goods delivery to/from Europe, 13% of customers would be interested in long-haul bulk-dry transport, 7% preferred bulk-liquid movements, 9% used small-packet delivery in bulk, 1% saw large/heavy items delivery as their preference, 19% said they had no bulk delivery requirements at present, but would consider it, whilst 22% said they had no bulk needs now or ever.

For Q.5, the question of multi-point bulk deliveries to/from Europe was raised 17% said palletised goods were of interest to them, 3% said bulk-dry multi-point may be useful, 2% liked the idea of bulk-liquid multi-point, 5% could use bulk small-packet multi-point, nobody required large/heavy multi-point deliveries, with 73% answering none of the above.

In answer to Q.6, regarding the regular use of multi-point courier services to/from Europe, a resounding 64% said they could use such a service.

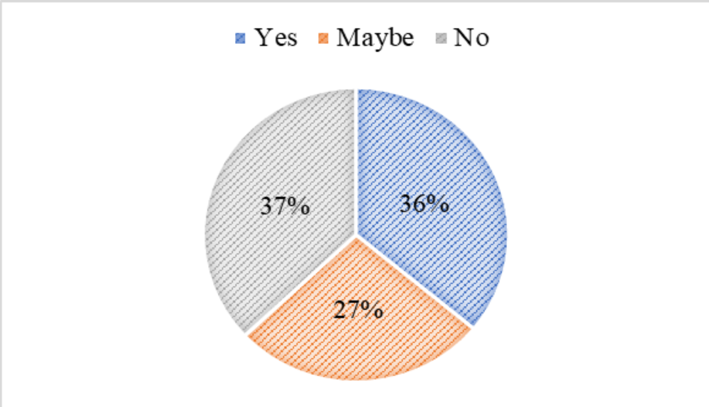

Fig. 1. Responses to Q1 - Would you use premium logistics services, if they were designed just for your needs?

As can be seen in Fig. 1, of those answering Q.1, 36% would indeed use premium logistics services, if such a service was designed just for their needs. 27% said maybe they would consider this, whilst 37% said they would not use such a service.

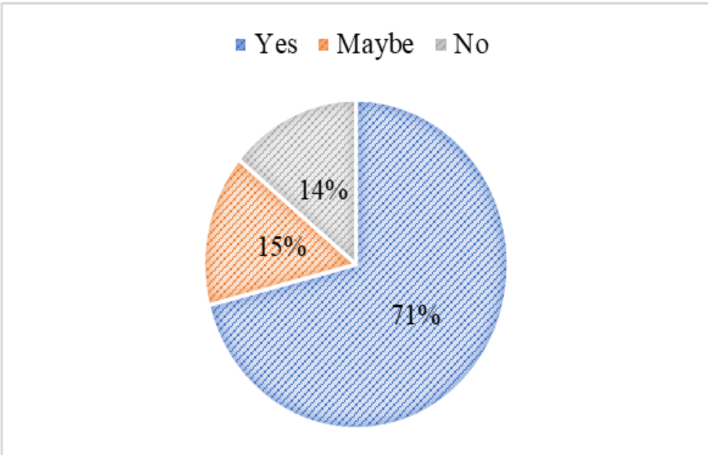

Fig. 2. Responses to Q.2 - Would you use new logistics services at below average prices, but with slower, more relaxed delivery times?

As can be seen in Fig. 2, regarding those answering Q.2, 71% would use lower cost logistics services, even if such a service was slower and more relaxed in terms of delivery. 15% said maybe they would consider this, whilst 14% said they would not use such a service.

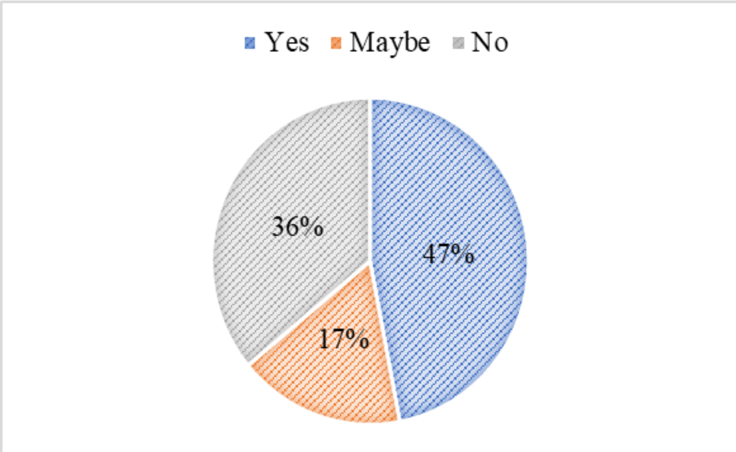

Fig. 3. Responses to Q.3 - Would you use new logistics services at above average prices, but with faster, less flexible delivery times?

As can be seen in Fig. 3, of customers answering Q.3, 47% said they would pay more than average for logistics services that were faster, with more specific delivery times, with 17% saying perhaps they would, whilst 36% said they would not.

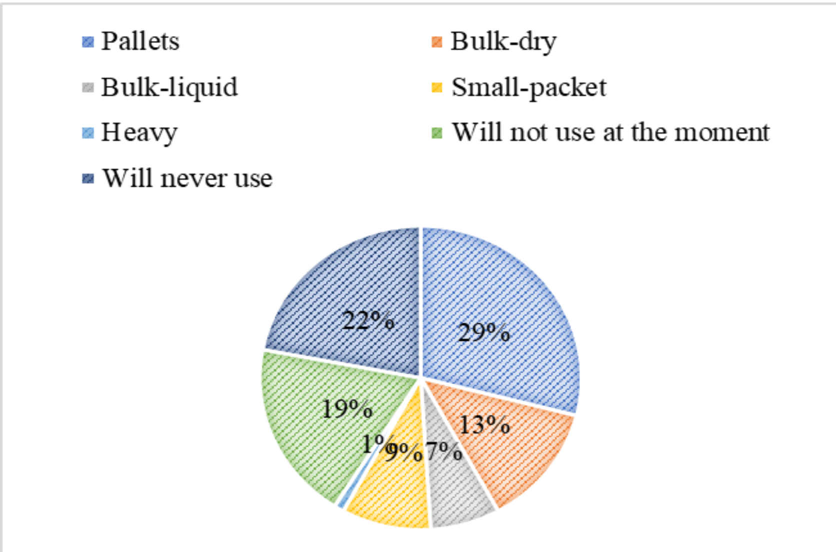

Fig. 4. Responses to Q.4 - Would you use new single-point bulk delivery services to/from Europe for palletised, bulk-dry, bulk-liquid, small-packets, large/heavy items, no bulk single-point now but possible or no bulk single-point now or ever?

As can be seen in Fig. 4, answers to Q.4 show that 29% of customers would consider palletised goods delivery to/from Europe, with 13% saying they would be interested in long-haul bulk-dry trucks, 7% preferred bulk-liquid tankers, 9% liked the idea of bulk small-packet deliveries. Only 1% saw large/heavy items deliveries as being of interest to them, 19% had no bulk delivery requirements at the moment, but may have later, whilst 22% said they had no bulk needs now and would never have.

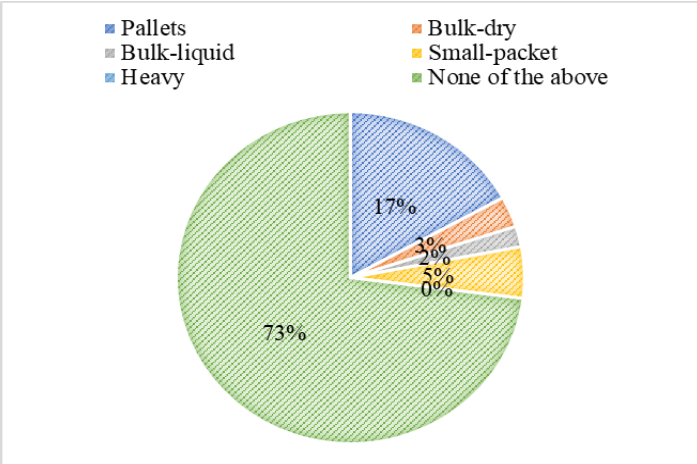

Fig. 5. Responses to Q.5 - Would you use new multi-point bulk delivery services to/from Europe for palletised, bulk-dry, bulk-liquid, small-packets, large/heavy items, or none of the above?

As can be seen in Fig. 5, Q.5 answers to the question of multi-point bulk deliveries to/from Europe attracted 17% of respondents saying palletised goods were of interest, 3% thought bulk-dry multi-point may be useful, 2% were interested in the idea of bulk-liquid multi-point deliveries, 5% could use bulk small-packet multi-point, nobody required large/heavy multi-point deliveries, whilst 73% answered none of the above.

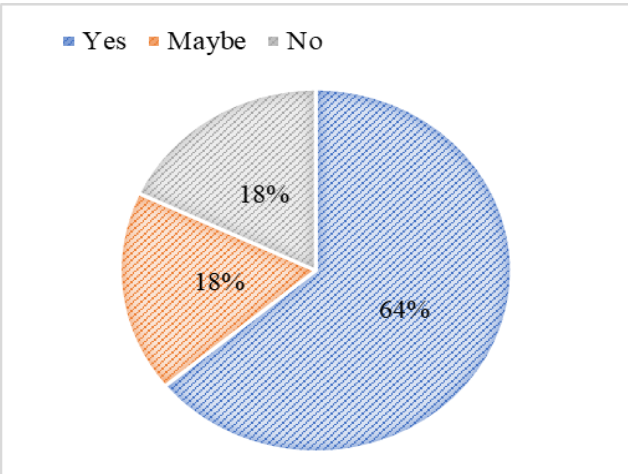

Fig. 6. Responses to Q.6 - Would you regularly use new multi-point courier van services to/from Europe for small/light packages?

As can be seen in Fig. 6, Customer answering Q.6, regarding the regular use of multi-point courier services to/from Europe, a healthy 64% said they could use such a service. 18% said they would consider such a service, whilst the remaining 18% indicated they would not consider it.

Manager Interviews

The manager interviews at Company A and B, provided good insight into the needs of Uzbek companies who are already trading with Europe:

- Both Company A and B said that many Uzbek hauliers were transporting to specific hubs and charged much more for unusual situations or unused locations;
- Both companies indicated that some hauliers were unreliable, too slow, made promises they did not keep and some trucks were quite old;
- They both said that they tended to use the better, more reliable Uzbek hauliers to avoid these problems, unless they had no choice;
- Company A said that bulk single- and multi-point services would be useful with full or partial palletised drop-offs, with a single to five pallet minimum delivery;
- Company A also said that direct door-to-door delivery services, could be useful, using courier vans for small-packets, trucks with bulk-dry or –liquid, but for them, full loads to single locations would be more attractive;
- Company B advised that a specialist service designed just for them, with specific vehicles and under contract, would be very useful, because two of their clients require regular tanker and grain haulage. Specifically, the company asked if Company X or other logistics firm, could immediately provide six full-size tankers to regularly deliver domestic fuel oil to between one and five drop points in Greece;
- Company B also asked if there was an affordable service in existence that was quicker, using small vans or motorcycles, since urgent courier deliveries door-to-door were becoming more popular for some of their goods, and it was often too expensive.

These responses indicate that there are some needs that are not well catered for by certain Uzbek logistics services, and with more market research and logistical analysis of individual company requirements, specific and tangible new services could be designed.

Conclusions

This was a very informative study into Uzbek logistical services and new opportunities were evident for increased trade to and from Europe and innovative services to cater for these. The survey questionnaires revealed a good proportion of interest for bulk transport of palletised goods, with part or full load drop-offs. Additionally, single- and multi-point bulk-dry and bulk-liquid road deliveries, also indicated strong interest, with even an immediate demand to deliver domestic fuel oil to Greece.

Another area of significant interest was for faster and more available courier-style services, to multiple distributor points and multi-point door-to-door European address deliveries.

There were opinions aired and research suggests that Uzbek logistical services are good and trading prosperously, but there was room for improvement and opportunities for better or more dedicated services, especially contract services designed for individual companies.

Further research is required to determine the actual validity of new innovative logistical services, with complete market, logistical and financial analysis of specific and tangible scenarios that can be applied and offered to real clients in Uzbekistan and co-operative partners in Europe.

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Sirojiddin Nursaidov. THE TOURISM OPPORTUNITIES OF UZBEKISTAN AND POSSIBILITIES RUNNING FAMILY GUESTHOUSES

EKA University of Applied sciences, Management

Scientific advisor: Dr.oec., Professor Vita Zarina

Abstract

Research relevance: The history of Uzbekistan dates back to is more than3.5 thousand years old.Therefore the country has multitude historical and sightseeing places that is recognized by UNESCO. Through taking advantage of these opportunities the government is struggling for becoming the country one of the top touristic destination in the world. As a result the influx of international touristsis increasing from year to year. That is why the authority is building massively prestigious hotels to provide incoming tourists. Along with hotels there is a huge demand for cozy guesthouses and it can be great time for local entrepreneurs to run the business in the field of tourism.

Research goal: To explore possible versions to run the guesthouses in the market of tourism and make an contribution to tourism industry of Uzbekistan.

Research methods: To achieve a purpose of the research, questionnaires are asked as a tool of quantitative research. Along with literature review, experts interview and statistical data are looked through

Main findings: In the first chart it is given much information about industry in Uzbekistan and Information is supported with statistical data and documents researches. In the second chapter it is made research about new guesthouses open possibilities, research is supported by expert interviews and potential clients questionnaires.

Keywords: Tourism; family guesthouses; Uzbekistan; taxes traditions; cuisines.

Introduction

In the last decades, international tourism has been gaining importance in the economies of many countries. It continued to grow throughout the world, in line with vigorous world economic expansion especially in countries with high tourist outflows (World Bank, 2012). Through realizing its countless tourism resources Uzbekistan is struggling to take advantage of these opportunities to appeal international touristic flow. That is why the country since last decade spending a vast amount money to revitalize historical places and create new recreation facilities. As a result of governments effort Uzbekistan achieved noticeable results internationally and aroused a lot of interest by world community to visit this country. Even the government abolished entry visa system for more than 100 countries citizens and introduced E-visa system for nearly 80 countries. Consequently, influx of international tourist to the country substantially increased within the last 3 years and the country had to build up new large capacity hotels and other analogical facilities to provide tourists with accommodation. In spite of the state is having pretty enough hotels, they are facing with problem on finding available room for incoming foreigners because of unmanageable flow. Finally, government decided to establish guesthouses system and let families to open guesthouse in order to provide arriving tourists with available living places. Therefore, running guesthouses is becoming popular business in Uzbekistan for families.

Aim of research is to examine touristic opportunities of Uzbekistan and possibilities of running family guesthouses through investigating incoming flow of international tourists.

Research methods. Quantitative research method was used to process the survey. The main data has been collected by questionnaire and looking through feedbacks by tourists

Analytical Review

A glance at Uzbekistan touristic opportunities

Tourism is one of the fast growing and high income-generating industries in the world, which contributes to strengthening of international socio-economic, cultural and spiritual relationships. Uzbekistan pays considerable attention to the development of tourism as one of the leading countries in the world, having rich cultural and historical potential.

Well-located World Heritage sides of Uzbekistan, amusing history of medieval scientists, and undiscovered nature of people make attractive for visitors from all over the world. A vital factor in the history of the southern part of the region was its location astride the most direct trade route between China and Europe, the so-called Silk Route which began to be developed in the Roman times (Kemal Kantarci, Muzaffer Uysal, & Vincent P. Magnini, 2014)

What comes to your mind when Uzbekistan's tourist attractions are in question? First of all, it is the country's architectural heritage, richest in Central Asia: masterpieces of medieval Islamic architecture - minarets, mosques, madrasahs (Islamic colleges), mausoleums, fortresses, palaces, etc - as well as ancient Zoroastrian and Buddhist temples and ruins of ancient settlements. More and more, in the country located unique sacred places that are valuable for people professing religions such as Islam, Christianity, and Buddhism. These resources could provide an opportunity for further development of religion tourism sector in the area. (Faranda &Nolle, 2011; Kantarci, 2007; UNWTO, 2012b). Among all of them stand out the famous Registan Square in Samarkand, with the three marvelous madrasahs built in the XV-XVII centuries at its three sides, and the grand Gur-e Amir Mausoleum where the great conqueror Tamerlane (Timur) is buried. Bukhara is first of all associated with Ismail Samani Mausoleum dating back to the 9th century and the 50-meter-tall Kalyan Minaret. (There are over 170 important architectural monuments altogether in the city.) Khiva is famous for its unique Ichan-Kala 'inner city' historic part - a walled medieval Central Asian town being preserved as it was in the past - an artifact town.

Since the break-up of the Soviet Union in 1991, the former Soviet Asian States (Kazakhstan,Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan) present considerable opportunities to become a major tourist destination in the way of unique cultural, historical, archeological, and natural attractions. After becoming independent, the policy and model of tourism development in these countries was mainly based on improving tourism infrastructure (Coulibaly et al., 2012).

Among these countries, Uzbekistan has also begun to choose the path of development in the field of tourism One of the biggest advantages of Uzbekistan was having its numerous ancient monuments, rich nature, and the present-day rapid progress to attract the whole world's attention. For centuries the country was at the intersection of the Great Silk Road routes along which merchants, geographers, missionaries, and later tourists traveled. It is striking how the history, traditions and cultures of the nationalities populating the present-day Uzbekistan have been entangled with the history of Great Silk Road.

Notwithstanding Uzbekistan possessed numerous touristic opportunities the country could not exploit enough its full potentials for a couple of decades after gained its independence. It was attributable to political regime by former president Islam Karimov. Of course, that needs to be admitted Karimov made many contributions for the country prosperity but Uzbekistan was not open like today. The tourism in Karimov's government was enterpreted differently in the past decades. Many experts believed that currently the tourism sector has a limited impact on the national economy of Uzbekistan, and its potential is not used to its full extent (Tukhliev & Kudratov 2007).

Tukhliev and Kudratov (2007) described the current situation of Uzbekistan's tourism industry and the followed marketing strategies in their research book "Uzbekistan Tourism Industry".

The authors commented that the Uzbekistan tourism industry cannot achieve any remarkable progress compared to other neighbouring (Central Asian) countries, although the country is endowed with many tourism attractions. Their criticism is focused mainly on the failure of the Uzbek National Tourism Board to develop and launch any dynamic and effective promotional strategy. Furthermore, they propose the creation of an independent organization to perform the marketing activities of the Uzbek National Tourist Board and of the tourism destinations administered by it. In addition to that they strongly recommend formulating and implementing the proper marketing strategy so as to fully exploit the potential of the tourism market and to avoid any aimless policies towards mass tourism development in Uzbekistan. Another local expert Khamidov (2010) also highlighted a series of dearth of Uzbek tourism and gave some proposals to improve the sector. He mentioned that the tourism industry has become a top priority in most of the destination countries and there is increased competition among the countries to attract tourists. In the face of worldwide increased competition, Uzbekistan lacks far behind in attracting relatively larger number of foreign tourists, mainly due to inadequate and ineffective promotional strategies of the industry; lack of sufficient funds; low quality of promotional materials and their improper distribution; and, perceived negative image of potential tourists about Uzbekistan. The author also emphasized the importance of the competition and in order to attract a significant number of foreign tourists, Uzbekistan needs to give priority to effective promotional activities. In addition, tour operating firms need to give proper attention in developing the promotional materials and special care is required to incorporate the factors affecting the choice of potential tourists. Without effective and sufficient promotional activities from both the public and private sector, there is no possibility or little possibility to emerge tourism as a major contributor to the national economy. Navruzzoda (1996) mentioned that possessing outstanding tourism resources is not sufficient to lure the optimal number of tourists to a tourist destination. Globally the challenges that countries are facing in the tourism industry are numerous and complex. However, addressing these challenges require a high level of collaboration and coordination to marshal the resources that possess Uzbekistan. Speaking about the development of tourism in the country, we should note the importance of tourism deployment model of government and the steps of modernization, systematization of services and integration of tourism infrastructure suppliers in worldwide tourism market, foreign investments and credits in the industry could be underlined as a central. Commercial interest in the region has grown considerably over recent years, with ancient connectors between the Middle East and Asia being revitalized in a surge of investment and trade in energy, infrastructure and manufacturing. According to UNWTO, government need to improve infrastructure and make easy its connectivity, advancement of Information Computer Technologies (ICTs) and enhancement mobility could make more opportunities for tourism industry of country(„Handbook on E-marketing for Tourism Destinations - World Tourism Organization‟, 2013.).

Implementations in tourism of Uzbekistan

The Uzbekistan tourism has been massively reformed after Shavkat Mirziyoyev was elected as the president of Uzbekistan. In 2016 former president Islam Karimov passed away of severe illness unexpectedly and government arranged new presidential election, with noticeable votes He came to power in government. He did tremendous jobs internationally and one of his planned target was to develop the tourism. The new government analyzed all error and limitations in the past and put long–term projects to accomplish in a short period of time.

During the past the past period 25 project of regulatory and other of acts have been elaborated and confirmed. . In particular, three basic decisions of the state leaders were approved in the sphere of tourism (one Decree and two Resolutions), according to which the implementation of 147 measures intended for the development of domestic tourism, inbound tourism, as well as general touristic potential of the country was provided. To be more precise, for the first time was confirmed the Program of the domestic tourism development "O'zbekiston bo'ylab sayohat qil!

Additionally, the non-visa regime was introduced to the citizens of 101countries From the 15th of July, 2018, the system of electronic visa registration and issuance began to function for over 70 country citizens. Knobloch (2013) mentioned, Uzbekistan undoubtedly have abundant resources and potential for development of tourism. However the country needs integration and modernization to become competitive in this businesses. Therefore the country picked up its modernization model on the way tourism. Uzbekistan in more than 350 printed and electronic editions of 40 countries is organized, as well as the transmission of television broadcasts about the touristic sites of Uzbekistan on more than 30 TV-channels in 14 foreign states, including Spain, Italy, China, Japan, the Republic of Korea, Israel and others. Info-tours are organized for the representatives of about 50 foreign mass-media agencies, including Nippon-TV, Loaded Films, CCTV, My Planet, National Geographic, Midas Group, Dialogs about Fishing, Heads and Tails, Indian Women's Press-corpus, etc. from more than 20 countries being the largest markets of outbound tourism, such as Russian Federation, France, Great Britain, China, Singapore, Japan, Indonesia, Israel, Turkey, UAE and others (the program of the Chinese TV-channel CCTV-7 about the gastronomic tourism in Uzbekistan was viewed by more than 150 million people). Through the capacities of the diplomatic missions of the country abroad informational brochures "Visit Uzbekistan" and "10 Reasons to Visit Uzbekistan" in English, French, Spanish, Italian, German, Russian, Chinese, Japanese and Korean languages are prepared and spread among the foreign community. Intended for the development and demonstration to the American and world viewers of Uzbek gastronomic tourism, the visits of two popular American video bloggers Mark Wiens and Sonny Side to Uzbekistan on gratuitous base were organized (they have total followers' amount of 6 million people and 800 million hits on their channels in the social networks). Moreover, the trip of "Vagabrothers" bloggers (USA) to Uzbekistan was organized from the 30th of November to the 10th of December, 2018. The aim of the visit is the organization of camerawork of the historical-cultural sites of the country for further transmission in the American mass-media. Besides, on the 3rd-5th of October, 2018, the annual Tashkent international touristic fair was held named "Tourism on the Silk Road", where more than 30 heads of foreign national touristic administrations (the Republic of Korea, Thailand, Indonesia, Turkey, China and others) participated, as well as the representatives of the foreign mass-media agencies from about 20 countries. (https://uzbektourism.uz/newnews/download?url=21.02.ang.pdf)

As the result, the implemented state policy and the reforms by the government on tourism development allowed including Uzbekistan into various international rates concerning tourism, where high indicators are observed.

Table 1. Uzbekistan's tourism in the international rates in 2018. (Source: Uzbek tourism's news)

Rate	Criteria	Place taken
Rating "Gallup Global"	Analytical agency "Tour Stat"	5th among 142 countries
British newspaper "Financial Times"	10 most attractive touristic directions in the coming year	2
Magazine "Travel and Leisure" (PRC)	The best place for tourism	1
"Lonely Planet" (publishing company issuing guide-books for the tourists of modest means)	Popular touristic directions in the coming year	2
Analytical agency "Tour Stat"	Top 5 popular countries for gastronomic tourism	5

The possibilities of opening guesthouses in Uzbekistan

Due to Uzbekistan's substantial reforms in tourism, within the last 3 years the influx of foreign tourists coming to Uzbekistan have escalated tremendously. Let us review some statistics, so in 2017, 2.69 million foreign tourists entered the Republic of Uzbekistan. This indicator is 32.7% more in comparison with 2016, In its turn, during 2018 the quantity of foreign visitors made up 5.35million people and exceeded the indicators of the analogical period of 2017 on 99%.In the first 11 months of 2019, around 6.2 million foreign nationals visited Uzbekistan, a 27 percent increase compared to the same period last year.

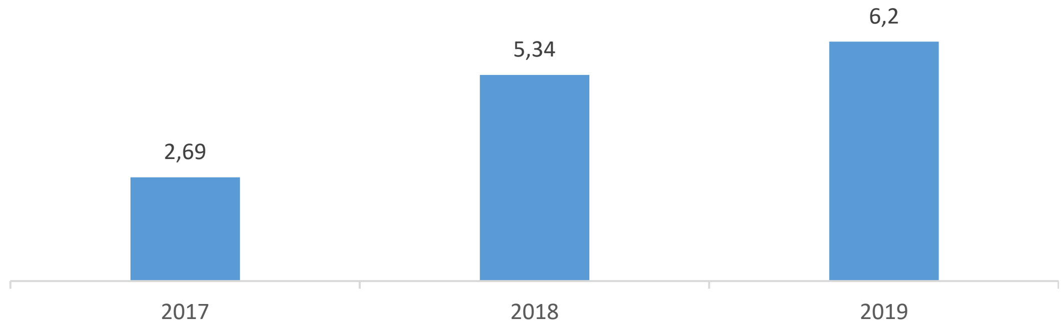

Fig. 1. Number of tourists (in milliom) (Source: Uzbekistan statistics committee)

The touristic flow into Uzbekistan is booming up from year to year, consequently it is creating demand for hotels and other sort of accommodations. With a view to support running business in the field of tourism, the government has signed a few decrees and laws. One of them is "The Decree on establishing of family guesthouses " by Cabinet of Ministers of the Republic of Uzbekistan on 7th of august 2018. After the decree came into force more than 100 guesthouses have been opened in the regions of country. The general content of the decree is based on the touristic potential of regions and helps to exploit their uses, improving the conditions for recreation and tourism, as well as creating new job vacancies in the provision of tourism services and welfare of the population. Moreover The main purpose of developing a guest house project is to showcasing national Uzbek traditions to incoming tourist from abroad and support family business.

What kind of houses can be registered as a guesthouse? According to decree Guesthouse is a private house that providing catering services coincide with accommodating guests. At the guesthouse tourists live on the principle of cohabitation with the host family members. To be turned simple houses into guesthouse The house must have up to 10 people receiving capacity and each inhabitant needs to live into 3x2x square meter width. Furthermore landlords must create the necessary conditions for tenants. The list is approved in three sections: sanitary facilities, safety and convenience. For example, water supply, fire extinguisher, landscaping, telephone, etc. There are also recommendations - they are optional but necessary. For Examples include emergency lighting, taxi service, sauna, swimming pool and more.

How to organize a family guesthouse in Uzbekistan. Each citizen of the republic of Uzbekistan can organize guesthouses, only the person must have legal accommodation in the territory of Uzbekistan and they needs to apply to the state tourism committee to access their houses. Applicants have to supplement to application with the copy of legal certificate which justify their registration as an entrepreneur and show papers that is possession right for the building. Within the three working days from the date of receipt, the Committee considers documents and draws up the act on results. Registration and application processes is absolutely free. According to the laws of the Republic of Uzbekistan, small entrepreneurs who wishing to establish guesthouses are allocated soft loans up to 300 times of the minimum wage for a period of 5 year. One of the unique features of family guesthouses is their low cost the guest houses not only reflect nationality but also help to reduce expenditures of tourists.

How are tax payments estimated for family guesthouses? According to the Decree of the President of the Republic of Uzbekistan No. PQ-4086 December 26, 2018, the private entrepreneurs or family enterprises which providing family guesthouse services pay the fixed amount of tax when total income from the sale of goods (works, services) during the calendar year does not exceed 100 million soums: (10 thousands euro). According to regional location tax payments vary as follow:

350 thousand soums, in the capital Tashkent;200,000 thousand soums, in Nukus and regional centers; 100 thousand soums in other cities 50 thousand soums are paid in other settlements

If the guesthouse's annual income is more than 100 million soums but less than one billion, the legal entities must pay 4 percent share of yearly revenue. In excess of one billion annual income, the guesthouses pay taxes and other mandatories which intended for legal entities.

According to the decree the family members of the sole proprietor who opened the guesthouse are exempted from the fixed tax payment and only according to Article 311 of the Tax Code, a single social payment of 50 percent of the minimum wage is paid for each family member.

Why guesthouses are being sought-after business in tourism sector of Uzbekistan? There are some reasonable indicators to be outlined. Primary reason Uzbekistan is possessing a multitude of touristic resources which appeal foreign people. Uzbekistan contains a marvelous and rich untapped tourism interest that has prodigious potential to organize different type of uncommon accomplishments ("Central Asia: Problems and Perspectives of International Tourism :: SlavomírHorák," 2014). These resources not only including millions of historical sightseeing places also availability of a large number of natural treasures like mountains, lakes, rivers, meadow woods, deserts and national gardens can help to develop ecologically and adventure tourism in the country. Therefore each region is distinct from other one in terms of geographical location and having attractive destination. According to statistics in Uzbekistan roughly 60 percent touristic places located in suburban areas but on the contrary all hotels in Uzbekistan are located in the centers of regions. Of course, at first every tourist directly head for any reserved hotel as soon as the airplane lands on the airport and they spend approximately 3-4 days to get to know the area of city. After wandering around pointed zone they will have interest to explore remote areas which gives real pleasure. Unfortunately, it is very difficult to access to any available hotel there that gives great opportunity for entrepreneurs who willing to run a business in this market. Secondly, Uzbekistan has a large number of unemployment rate albeit having many manufacturing service. For this reasons The government is struggling hard to create new workplaces but still unemployment problems remaining topical issues of country. In search for job opportunities many people are immigrating to other countries. In order to provide its citizens with the job current president Shavkat Mirziyoyev giving a lot privileges for entrepreneurs and citizens who want to create new job vacancies regardless of employment type. Every encouraged citizen who opened family business can provide at least his family members with a job. In addition, guesthouse business does not require a vast amount of money compared to other business types which involves big investment. "I began to follow the speeches and articles in the press and noticed that the number of tourists coming to our country is growing, and there are not many hotels to accommodate them. By this time, the house I had rented was empty and I was preparing - I had submitted the paperwork and bought the beds, the bedding, the dishes and the tables. Most of the money was spent on these purchases, and I invested total 30 million soums . Two months later, in October 2018 the Nice Guest House opened. The area of the house is 17 to 22 m². There are four numbers" says Noman Ikramjanov, the founder of the "Nice Guest House" in Tashkent. So, initially to open guesthouse on average 30 million soums (3 thousand euro) must be spent. Of course, the amount of expenditure depends on house interior and exterior design. Even the house owner does not spend much money If the house is in good condition or has all facilities.

Research methodology

In order to find out the response to the question for what reason tourists are choosing guesthouses to stay, the author conducted questionnaire among 50 international guests who were staying at 2 different guesthouses "Hamida" and "Green House" in Samarkand city. From the responses 3 criteria were identified to seduce them stay there

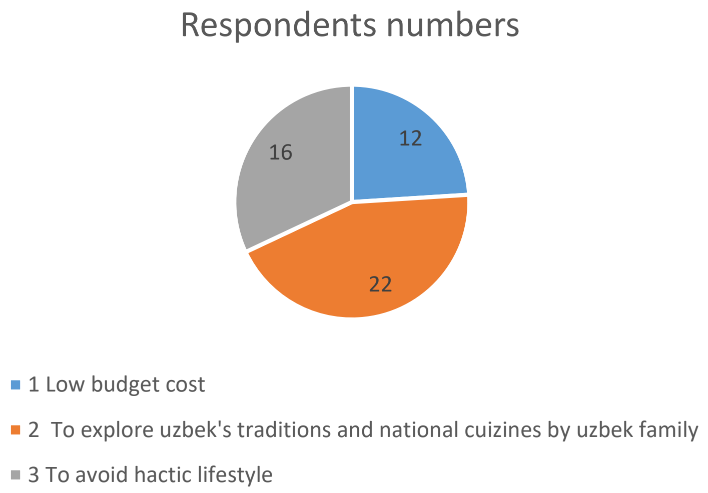

Fig. 2. Results (source: author's compilation)

It can be seen from the data most of tourists prefer staying at family guesthouses for purpose of getting acquainted with uzbek's long dated traditions and taste their scrumptious foods. Of course through living with real uzbek family every foreigner can explore new culture even family members could serve local guide services to show around the city. Second criteria is to avoid hectic lifestyle family guesthouses is perfect place who want to relieve stresses and get rid of hustle and bustles of life because the house has its green zone, swimming pool and pretty yard with different tree. Small number guests caring about low budget cost.

Feedback Reviews

Moreover, the author also was interested in finding information about drawbacks in guesthouse services and visited more than 35 guesthouses' internet websites in search of clients' feedbacks in reviews part. They all posted positive comments about owners hospitality and catering services. Mostly guests highly recommended all to visit their previous stay houses especially who want to taste real uzbek cuisines and fresh fruits. In terms of language and communication all visitors from post-soviet union countries have written no any complaint due to all communication was in Russian but it can be found on reviews of 8 guesthouses out of 35 some tourists from English speaking countries and Europe faced with language barriers to talk with family. In addition, some guests complained about not accepting master card and American express, they noted only cash payments were available.

Conclusion and recommendations

In writing the research, the aim and objectives were fulfilled. Theoretical aspects of Uzbekistan's tourism and running guesthouses were studied with the help of literary, scientists and online sources review. Through studies it was identified that Uzbekistan has countless touristic resources and achieving big successes to appeal the world by doing unprecedented reforms. The government is supporting small business and private entrepreneurship via reducing or exempting tax payments and allocating loan. Due to incoming tourists massively into country opening family guesthouses are being sought-after. Many tourists are interesting in staying at guesthouses to explore uzbek nation traditions and a bunch of tasty foods by living together uzbek families. Moreover, the author noted some recommendations to enhance guesthouses services in Uzbekistan. The families who opened guesthouse should improve English communication skills to avoid language barriers because communication and language are one of the priority aspect in the tourism business sectors. Additionally, some guesthouses should embark on online payment system not only cash accepting because some tourists don't feel safe carrying money into pocket. That is why they prefer making payment by cards.

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Tokhir Urazov. NEW RESTAURANT BUSINESS‘S DEVELOPMENT POSSIBILITIES IN UZBEKISTAN

EKA University of Applied sciences, Management, urazov.tokhir@mail.ru

Scientific advisor: Dr.oec., Professor Vita Zarina

Abstract

Research relevance: The study is being conducted to highlight the development of new restaurant business in areas of Uzbekistan which are developing this business in. Restaurant business is one of youngest businesses of Uzbekistan like tourism, technology producing and other. That business is more important in other regions than capital of Uzbekistan because it can be beneficial to the economy of those regions of Uzbekistan because restaurant business is one of the main parts of economy not only in Uzbekistan but also all countries around the world.

Research goal: There are two main questions about opening new restaurant business in regions of Uzbekistan, they are “Is it possible to open new restaurant business in areas of Uzbekistan?” and “Are there major places which are suitable for opening new restaurant business in Uzbekistan?”. The goal of research is answering to these questions.

Research methods: In order to take the in-depth knowledge required to do interviews with experts, collecting data and scouring the internet.

Main findings: In the result of research describe possibilities to open new restaurant business in regions of Uzbekistan by some data collections and to recommend improving this business in areas of Uzbekistan.

Keywords: Restaurant; new business; Uzbekistan; development.

Introduction

From the research point of view, restaurant industry in Uzbekistan remains as one of the most unexplored markets. Particular aspects of market performance had been researched by Toleubaev (2010), Semykina (2000), Zhaksybergenov and Kulazhanov (2000), Choimbekov et al. (1996). The restaurant market is very dynamic in the developing countries and on one hand, these works are largely outdated but on the other, these works paid less attention to the comparative analysis of different markets. The comparative method is known to act as general orientation of knowledge. The research tries to find something in common or different when comparing processes, facts, concepts, elements of structure and the quality of the phenomena. In other words, comparison acts as a method of knowledge and in a way identifies general and particular in the studied phenomena, further becoming an orientation and navigation in the world of many phenomena. Moreover, science has developed many methods for quantitative and qualitative comparisons and it fact it is very hard to establish a single measure of differentiation. To emphasize, the most frequently mentioned and debated methods in the literature are: case-study, binary, regional, global and cross-temporal comparisons (Keman 1993; Stepan 2001; Landman 2008; Peters 1998).

In given case, a study of development level of Uzbekistan restaurant market calling for a combination of difference methods of comparative studies (Ragin 1989). In this regard, as a research methodology, a dual strategy combining binary research and case-study of Uzbekistan will be used. This will allow answering many questions, including: – At what stage of development the restaurant market in Uzbekistan stands? – What needs to be changed in the development of restaurant market and, in particular, the relationship between the restaurant and client, to improve the management of restaurants? – What is the prognosis and what are the trends in the development of various segments of the market? In terms of scientific research and analysis, how important is the restaurant industry? Although, this industry looks prospering, there are many hidden and latent problems. These problems appear due to the specificity of the industry, such as small size enterprises, secret recipes and etc., seem as not important in business but have not been researched well. That is why; science today has little understanding of the situation in the industry.

Market of restaurant services and its potential

Table 1 shows binary "portraits" of restaurant market in Uzbekistan. Table 1 shows that even if judged by the relative figures, the restaurant market in Uzbekistan is at the initial stage of development. This explains the relatively high growth of the market that demonstrates an annual growth of 20%, although in 2012 it declined and was only 13%. The US market. Today, in Uzbekistan one restaurant (without café) accounts for 9259 people or one place for 35 people on average. Even if we take into account a small café, one institution accounts for 1700 people. By the way, in Europe, one restaurant averagely accounts for 250 people, for example in France around 150 people (Haykin, Trabskaya 2009).

Table 1. Portraits of restaurant industry in Uzbekistan for 2013 (Source: Materials Statistics Agency of Republic of Uzbekistan 2013; Facts at a Glance 2013).

Indicators	Republic of Uzbekistan
Sales in restaurant industry	$ 965 million
Population on 1 restaurant (people)	9259
Average sales of a restaurant in last year	$ 231 000
Share of sales in restaurant industry in GDP	0.3%
Daily average turnover of restaurant industry	$1 159 thousand
Share of restaurant industry in total supply	56%
Share of small catering establishments (less than 50 employees)	95%

However, this is unlikely since the profitability of premium restaurants (fine dining) in Uzbekistan is 500% and above, middle level restaurants (casual dining) 300–400 %. It is this high profitability of restaurants contributed to the fact that the average income of restaurants in Uzbekistan. The average monthly wage in Uzbekistan is about $ 500, this means that the average cost of the check and the average cost of meal in Uzbekistan is much higher. Average check in premium level restaurants in Uzbekistan reaches $120–160 per person and in middle level restaurants about $50 per person. With average monthly wage of $500, these numbers are incredibly high for Uzbekistan.

The abovementioned definitely affects the average daily turnover of restaurants. In Uzbekistan this figure is considerably less, while the share of restaurants in the total volume catering is respectively the same. Thus, binary comparative portrait shows the situation on the market in Uzbekistan: bet on high prices and low availability of restaurants for the middle class citizen, who can rarely afford to go out to low price level restaurants.

Features and trends of restaurant market in Uzbekistan

Consider the development of main segments of the restaurant market in Uzbekistan. The segment of premium level restaurants is fairly closed and unadvertised. In Uzbekistan's largest city Samarqand some examples of such restaurants are Le Dom, Paladium, Bibliotheque, El Mirador, Café Del Teatre, Sadu, Via Del Mondo, Porto Malteze, Villa Del Fiori and others who have own circle of customers with high incomes. On one hand, this market is far from saturated since in the country, there are not more than 20–25 successfully working premium level restaurants. On the other hand, customers often are not in a hurry to go to these places. Therefore, the total amount is less than 1% of the population or 25% of potential customers. Moreover, high profitability of restaurant courses with low total amount of coverage and higher investment costs leads to a slow payback of a restaurant, about 5–6 years. As a result, fine dining restaurants are experiencing difficulties in their work due to: continuing need for financial resources to maintain theirs standards, high level of competition among the elite restaurants, increased payback period of projects for the development of a restaurant, a need to import expensive and high quality products. Restaurants of this segment are oriented on high level of dining or have a national-regional specialization of cuisine. Middle level restaurants (casual dining) get rapid development in Uzbekistan. Restaurant market of this segment is more saturated at the moment than 5–6 years ago. However, this segment is not fully formed but has great potential. Significant development of this segment is explained not by the communion of population to the culture of eating out in restaurants but by the fact that restaurants of this segment are largely focused on the wedding-banquet services. Banquets, weddings, anniversaries became a major source of income for these restaurants and their profitability depends on the owned area of banquet halls and the capacity of people fitted in this area. Another popular trend is the expansion of free-flow concept and business lunches at the affordable prices. Not everyone can visit these restaurants in the evening due to the high cost of individual services. On the other hand, restaurant sometimes cannot reduce costs because of high prices on food and raw materials which are not produced domestically. The competitors for this segment of restaurants in recent years is booming market of coffee shops and market of low price restaurants lower, sometimes so-called fast food. Sector of low-end restaurants and fast food is the segment that has been booming in the Uzbekistan market for the last 5–6 years. It firmly riveted the bulk of customers interested in eating out. Mainly this segment firmly seized the market of young people, who are the main customers for fast food chains. Such places as Pizza Land Fast Food, Ozyurt, "Chicago Dogs", KFC, Burger King, Hardee's, Ciao Pizza, Del Papa, Pizza Hut, Texas Chicken, etc. have become places of leisure and gathering of youth. Furthermore making these restaurant chains booming locally and regionally, some of such examples are McDonerci, Uzbechka, Dastarkhan food and "Perekus Centre". The rapid growth of this segment is explained by the cheap projects, quick payback, and democratic prices. Average check in this market is around \$10–15. Thus, fast food restaurants in the past six months and had around 70% of visitors from major cities of Uzbekistan and the age range is from 18 to 55 years old. This is the highest indicator on the restaurant market. Moreover, another trend and feature on the market for restaurant services in Uzbekistan is a sharp increase in beer and pub restaurants. Although pub is not classified as

restaurant, it should be noted that its growth significantly pulls customers from restaurants sector. According to the forecasts, pubs have huge potential for growth in the future and they might become a significant competition to restaurants. Demand for pubs is satisfied in Uzbekistan by not more than 40%. About 30% of people regularly visit Tashkent beer restaurants, where the bulk of the visitors are men aged 25–35 and about 10% of women regularly visit beer bars. Organization of own brewery is quite expensive project, from 500 thousand dollars to \$1 million. The cost of opening a restaurant with its own brewery is from \$1.5 million and initial investment will be about 200–300 thousand dollars (in midtown area – 140 sq. m.) together with the costs of facilities, equipment and security. Payback will be about 1–2 years. Besides, this business attracts because of a quick implementation of business itself in the event of closure. Average duration of exposure is usually not more than 3 months. The high cost of restaurant services has caused a significant increase in the number of coffee shops and cafes. Today in Tashkent, there are about 20 coffee shops (100 thousand citizens – 0.3 coffee shops) whereas; the first coffee shop is Phloston Paradise opened just five years ago. Some examples of most popular coffee shops in Tashkent: Gloria Jean's Coffees, Chocolate, Marrone Rosso, Coffeedelia, Costa Coffee, Coffeemania and Cafeteria. Further, in Moscow and St. Petersburg, there are 100,000 citizens per 0.7 coffee shops. In New York City – 27, in Seattle – 62, in Milan – 135. These figures indicate that this market will continue to flourish. Business in terms of coffee shops is attractive and fast growing since the cost of a cup of coffee is several times lower than the price quoted on the menu (return 500–700%). However, initial investments in the coffee shop (coffee and refrigeration equipment, interior, furniture) range from 80 to 150 thousand dollars, excluding the cost of rental space. Additionally, operating expenses should be added among other things, including the cost of training baristas (bartender, person making coffee) and pastry-cook from foreign experts. The payback of a coffee shop is estimated between 2 and maximum 3 years. Special characteristic of Uzbekistan coffee shop market is that the emphasis is placed on the coffee and pastries that are usually homemade. Close attention is paid not only to the quality of coffee, but the range of drinks and cocktails based on coffee. Often, one can find in the menu totally unconventional products, such as beer and hot dishes. According to the owners of coffee shops, the menu and what they serve is dictated by the demands of the local consumer. Currently, they are at the stage where coffee houses have to compete not only among themselves but also with restaurants and cafes. At the same time, this situation is advantageous, even in the case when coffee shops become less popular, it will be easier to reposition their strategy.

Business model of restaurants

Big portion of restaurants are based on the use of own resources of restaurant owners. As the conducted survey of 30 restaurants in Tashkent shows, only 20% of owners have resorted to bank services for building restaurants. 90% of the surveyed restaurants used tax benefits through the use of a simplified tax regime. This mode is used when the company's turnover in a year is less than 487 thousand dollars (2013), number of employees less than 50 people and corporate tax income in this case is 3%. Coffee shops and restaurant chains mostly use franchising. Franchising options, often used in Uzbekistan: – The franchisee pays an initial fee and then lists the monthly or quarterly royalty – from 4% to 12% from turnover. Sometimes royalty paid on the profits or gross purchases. – Franchisee actually buys know-how without the brand and does not pay royalties. – The franchisee buys the know-how and the brand, but does not pay royalties. – Under the agreement, the franchisee does not pay royalties, but must buy in the semi-finished products of the franchisor. – Benefits from franchising for the local business are obvious. For example, developing own business under a well-known brand is usually less risky investment and there is an increased chance to earn more. Franchising provides high efficiency due to already detuned business processes, ready portfolio of consumers loyal to the brand. Buying a franchise from an established network of restaurants reduces the commercial risk of a new business 4–5 times. The sellers of franchises are able to carry out regional expansion and by "proxy" conquer new markets. Franchise development program gives new impetus to further promotion of the brand, including empowerment, promotion from received franchisee contributions to the advertising fund. However, as shown by the survey of coffee houses chains of Tashkent, in practice, the franchisee may encounter some problems. Thus, there may be difficulties in completing the term of a franchise agreement making franchisor often initiate changes in the conditions of cooperation or sometimes does not renew the contract. Seeing the success of the brand in the local market, the franchisor usually prefers to open own retail outlet. To exclude such cases, one should pay attention to the details and conditions of the agreement with the franchisor.

Sometimes, when entrepreneur buys a franchise he can end up empty handed. For example, the franchisor verbally promises a powerful business support, such as management technologies, smoothly running logistic schemes, training of personnel and advertising. Later it turns out that all contract obligations of the parent structure are rather vaguely written but has well-prescribed obligations for the entrepreneur.

Support from the franchisor does not guarantee the success. High expectations and illusion that successful technology will be effective anywhere and under any circumstances, often leads to no return on investment. Entrepreneur often forgets that along with the franchise system he acquires a system of relations with the external environment, which does not always correspond to the current market situation.

Furthermore, entrepreneur often naively relies on a guarantee of success because of the brand. As one of the leading American chains of fast food brands in Uzbekistan is experiencing significant difficulties due to poor acquaintance with the local population and culture, hoping and thinking that the locals know this brand. Nevertheless, the advantages outweigh disadvantages in franchising, and today Uzbekistan is committed to more famous brands. In particular Uzbekistan eagerly awaiting the opening of the first American coffee shop “Starbucks”.

Features and trends of restaurant market in the USA and Uzbekistan

To a large extent the development of market for restaurant services determines the consumer of these services. Very interesting results from a research had been published by the US National Association of restaurants which we tried to compare with the portrait of Uzbekistan consumers (Table 2). In examining 30 restaurants in Tashkent, we surveyed customers in restaurants and the results are shown in the following table. Both of these findings suggest that the weakness of the restaurant industry is influenced by both objective factors such as low purchasing power of the population, and subjective factors, such as poor quality management in restaurants who have to make them more attractive. It should be noted that Uzbekistan restaurants use different methods to improve their competitiveness and attract customers. They use different shows, for example contests between customers, chefs, fashion shows, events for children, inviting famous artists, and etc. One of the common methods of attracting customers is the use of discount cards. Wi-Fi has become the norm in the restaurant. Nevertheless, it should be noted that such events are organized rarely. Uzbekistan restaurants still poorly use the reserves to increase attractiveness of a restaurant and do not develop programs for regular customers and customer loyalty programs.

Table 2. American and Uzbekistan consumer preferences (Source: Restaurant Industry Pocket Factbook 2013; researches of authors)

Question	Number of affirmative answers in the US	Number of affirmative answers in Uzbekistan
Do you think that the restaurants are offering healthier food than 2 years ago?	85%	8% (70% found difficult to answer the question)
Do you use internet to find the right restaurant?	34%	12%
Are you ready to use self-service terminals (self service ordering terminal) at fast food restaurants?	44%	30%(50% prefer to receive information from “first hand”)

Would you prefer restaurants that encourage customer loyalty and loyalty reward system than other restaurants?	66%	70%(90% customers did not encounter cases of customer loyalty in restaurants)
Would you like to receive gift cards and certificates during gift occasions?	79%	92%(86% do have discount cards in restaurants)
How much your family spends on average per year on eating out?	$2 620 (2011)	$350(not counting the invitations to banquets and events)
Do you think that restaurants are an essential part of your life?	45%	8%
Do you think that cooking your favorite restaurant meal and ensuring those taste qualities is not easy to do at home?	68%	56%(only 15% of Uzbekistan have their favorite restaurant meals)
Do you think that the restaurant is the best place to spend time with friends and for making connections?	79%	74% (But only 8% of Uzbeks prefer to spend their free time in the restaurant)

Today, competition policy among restaurants is reduced to only compete for various events, such as weddings, anniversaries, corporate events and etc. Such competition distorts the original meaning and nature of the restaurant, which is an institution that meets the diverse needs of people in food, rest, culture, communication and etc. A restaurant which only satisfies the need for the event is not a restaurant in its true sense. Such functional limitation of restaurants creates institutions working on the principles of the simplest catering services. The low level of living of the majority of the population, coupled with low level of management, leads to the fact that Uzbekistan family spends an average of 3 to 5% (depending on region) of consumer budget on food "away from home". At the same time, this situation allows to assess market opportunities very high: the market potential is huge for restaurant services. This also contributes to the influx of tourists in Uzbekistan. Structure of tourist flows largely depends on domestic tourism and outbound tourism. In Uzbekistan, number of tourists coming directly and purposely for tourism is not even 0.1% of the total tourist flow. From this perspective, the expected growth in tourism will lead to the development of the restaurant market. Moreover, the restaurant market in Uzbekistan has high level of bankruptcies and preservation risks in this industry. In Uzbekistan, 20% of new restaurants go bankrupt in the first year of its existence and in three years up to 60%. High level of bankruptcies in restaurants is a common phenomenon regardless of the country. Thus, even in Europe 45% of projects do not survive during the first 2 years. According to the World Directory of Bankruptcies D&B, the restaurant business confidently takes 4th place in the list of bankruptcies after the dress shops, furniture and photography shops (D&B Supplier Evaluation… 2013). However, if in the US and Europe, bankruptcy is associated with the high level of competition, then in Uzbekistan, this phenomenon has its own specific terms, where competition plays a smaller role. Bankruptcy of restaurants in Uzbekistan is connected, first of all, with a low level of management and poor preparation of the restaurant concept during its planning. Often you can find pretentious and uncomfortable restaurants that in order to payback are forced to raise prices regardless of the quality of food and level of cuisine. Other restaurants are going bankrupt because of the lack of parking space, wrong choice of location or lack of professional service. In general, the restaurant market is characterized by elemental, sometimes with largely spontaneous demand and lack of regular customers. Unlike the restaurant market in the US, Uzbekistan restaurant market has not yet agreed on common standards of facilities and service standards. Restaurant service and business processes have little attraction for restaurateurs. As a result, one can still find a lot of restaurants where the quality of service does not match the initial clamed level. Also, in Uzbekistan it is often possible to meet such phenomenon as the preservation of a clan system in the management of restaurants. Investors entrust their relatives to manage restaurants and in most cases their relatives are far from the restaurant industry and have a very vague idea on how to run such business.

Problems in restaurant management

As the survey of 30 restaurants of Tashkent shows, most of these restaurants do not have management system at all levels. So, even fine dining restaurants and local chain restaurants do not have a clear strategic management system. Most restaurateurs have not been specifically trained for strategic management and sometimes people with no background in restaurant business and similar industries run these companies.

As a result, mistakes start from the initial stage, such as choosing the restaurant concept, choosing wrong location of the restaurant, or the location does not match the concept of the restaurant, not analyzed map of the territory, traffic flows and a segment of population of the area.

Such amorphous state of the market leads to the fact that the restaurant industry is not fully developed in the professional restaurant management. Business itself has not yet become socially responsible business, making prices in restaurants to remain at a high level and does not tend to decrease. The culture of catering remains low: one of the common phenomenons is the inclusion of 10–15% tip to the check amount.

Moreover, a real external threat to the restaurants is that there are no reliable local suppliers of raw materials. Raw materials in most cases come from neighboring countries: Kyrgyzstan, Uzbekistan and Russia. One of the acute problems of the market is the lack of professional personnel at all levels. Today, in the highest demand are chefs, second place take waiters and the third are bartenders.

Also, the demand far outstrips the supply of managers, administrators and restaurateurs. The country has almost no specialized educational institutions, which would prepare the top managers for the restaurant industry. In recruitment agencies, there are 70–80% of requests for managers and chefs who have successful experience in opening and promoting restaurants that can operate efficiently and effectively, bringing new ideas to the business. In recent years, the demand increased for restaurateurs in the other regions. Generally speaking, not only administrative staff does not have the specific training in restaurant industry, but also the main production experts and there are no cooking schools.

Often, the premium level restaurants prefer attracting professional chefs from foreign countries. However, this does not always meet expectations, as these chefs do not take into account the specificity and of the local population and its mentality.

In most cases, low level of management leads to the inability to make quality menu and develop a competitive concept of meals.

In addition, what hinders the growth of quality is the high level of employee turnover in the industry. The highest turnover among waiters is 50% and among chefs turnover is 20%. In most cases this is due to the lack of regular systems of motivation. Uzbekistan, tipping had not become the norm for customers, but the culture of good service regardless of the tip had not become the norm for waiters.

From the surveys of Tashkent restaurants, the Table 3 shows the average motivational structure for the restaurant staff and the recommendations to develop better motivation system.

In the strategic and operational management of restaurants, all management models can be applied. The problem is that management in restaurants does not use the worked out by theory and practice known strategic and operational management models.

Moreover, SWOT analysis should be a tool for strategic analysis of any restaurant, it will allow to develop strategic alternatives (Mill 2006; Hill, Westbrook 1997). This type of analysis should be used from the start when the strategy of a restaurant is created. Every restaurant should have its mission and vision. Yearly diagnosis of a restaurant should be aimed at creating strategies to achieve that vision. Then, on the basis of that SWOT analysis, top management of the restaurant will be able to identify strategic gaps and develop capacity for new opportunities and activities to build more strength that is aimed at the elimination of the threats and weaknesses. However, often management does not focus on the vision of the restaurant. Importantly, achieving the vision is a way to develop the restaurant strategy after the diagnosis and analysis.

According to the survey, only 5% of restaurants have formally elaborated the mission and vision. But not in any case found that vision determines the development strategy and that staff has knowledge of the restaurant's mission and vision.

Boston Consulting Group model will help the management of the restaurant to analyze the menu and raise its efficiency. Expanding meals by the quadrants of "stars", "dairy cow" or "dead dogs", one should remember to make the right decision about the future (Henderson 1970). Thus, the analysis of Tashkent restaurants showed that half of them have meals in the menu which are not popular with customers. However, they were still kept in the menu to make menu seem diverse, the chef thought that these dishes are not appreciated or that the waiters did not advertise it well to customers. In some cases it might be true. However, the annual analysis, in the form of unfolding all the meals depending on sales by the quadrant matrix contributes significantly to more analytical and reasoned approach to planning the menu and updating it. This way attractiveness and interest of a menu can be achieved and maintained for customers.

Table 3. Recommendations to motivate the restaurant staff

Position	Traditional system of motivation in the form of wages, USD	Recommended additional methods of motivation and incentives
Manager (director) of a restaurant	1000–3000 and higher	Participation in restaurant profit (profit percentage of net income or revenue). Opportunity to participate in ownership in case of long-term payback of the restaurant. Social security: service car, health insurance, etc.
Manager	700–1200	Bonuses depending on revenue. Payment and training depending on the work results. Social security: medical insurance, gym, etc.
Administrator	500–900	Similar to Manager's methods
Waiter	300–500 + tips	Work to attract and make permanent clients, stimulating growth in sales of new dishes, wine list, a bonus depending on the sales
Chef	1300–3000	Premium depending on revenue, a share of tips, bonuses for menu updates and sales growth from new dishes, kitchen modernization, maintenance, and the absence of comments from regulatory bodies, free room and board if necessary. Social security.
Sous-chef	1000–2000	Premium depending on revenues, free meals, share from tips, arranging delivery at night.
Cook	400–1000	Premium depending on revenues, free meals, share from tips, arranging delivery at night.
Kitchen worker	300–400	Meals and arranging delivery at night.

Model of core competencies by Hamel and Prahalad (1994), as well as the models by Tracy and Virsemy (Harrison 2011) allows a restauran to choose those core competencies that will distinguish it from other restaurants.

As the research showed, 85% of restaurant executives were unable to determine the core competencies of their establishment. Most often, the answer to the question of core competencies was reduced to the standard response in the form: “Paying attention to the client”, “Quality and healthy nutrition” and etc. However, those are not core competencies, any restaurant should focus on the customer and offer quality food. Otherwise, this restaurant will go bankrupt in the shortest time. In fact, the core competencies have to be original and unique to a restaurant. Core competencies will improve the competitiveness of a restaurant and ensure its lead over the competitors. 15% of restaurant managers noted that using such competencies, significantly lowered the maintenance costs by automating the processes of taking orders, use of modern software, online sales and online reservations, use of deposits forms to attract customers and many other. Porter’s Positioning model should serve as a basis to competitively position the restaurant on the market and help determine its strategy by focusing on cost or differentiation (Porter 1980). In fact, Porter’s model can be used in conjunction with Prahalad and Hamel model. Further, restaurants can concentrate their efforts on reducing costs or product diversification. Specialty restaurants with ethnic cuisine and chain restaurants are focused on cost reduction and at the same time, most of the middle level restaurants in Tashkent use a strategy of diversification and offer both European and Asian cuisine at the same time. However, such strategy is not typical for premium level restaurants which prefer to specialize in one kitchen. Among the most popular today are Italian and Mediterranean cuisine. Lifecycle model by Adizes (1990) should be used to revive restaurants and allocate and introduce new services. Lifecycle service is the period from the release of a service into the market until its withdrawal from the market. There are six major stages of the life cycle services (Fig. 1), each of them is characterized by the combination of marketing activities, which provide an opportunity to carry out strategic plans and tactic forms on the behavior in the market. Interestingly, one of the features of young undeveloped restaurant market in Uzbekistan is not tradition but the novelty. With the opening of a new restaurant, thereis always an increase in number of visitors, which often serves as a pretext for calming down the owners of the restaurant. But this flow caused by the usual curiosity and desires to see a new restaurant. It is considered natural for a client who lives on a new, still developing and unsaturated market of restaurants. To prove, one can see a pattern of food courts in major shopping malls. Those restaurants are serving traditional and familiar food (Uzbek traditional manty, plov, etc.) and suffer losses in contrast to the American and other restaurants offering burgers. In this case, if a restaurant does not work on working to make clients regular or their retention, the lifecycle of that restaurant services quickly reduced and the life of the restaurant completed the first or second year of existence. Such factors as high level of expectation, low level of satisfaction to meet customer interests and needs (most of whom have the ability to compare with the foreign level of service) are responsible for the rapid extinction of a restaurant. Key factors here are to work to make clients regular and updating the menu on regular basis. Restaurant managers should maintain the level of marketing (research and study of customers, support by innovations and popular positions, regular promotions).

Fig. 1. Life cycle of restaurant services

Deve lopment of ser vices	Implementation of services	Consumption growth of services	Maturity of services	Market saturation of service	Decline in demand for the service

Projections for Uzbekistan restaurant market

It is obvious that the “pyramid” in the restaurant market in the coming years will be more down to earth. Its top (fine dining) will remain the same or increase slightly, to 5–10%. Segment of affordable restaurants will grow with new restaurants, but at the expense of other bankruptcies, and increase by 10–15%. Probably, the base of the “pyramid” will not suffer and expected to continue increasing profits in some businesses of this segment. Market of restaurant services in Uzbekistan is far from saturation, so the number of restaurants per year will increase by 10–15%, but the numbers of viable and profitable will not increase proportionately. In recent years, the restaurant market is attracting more and more investors because if done right, this business is able work for a long time and bring a steady income. Restaurants at the food courts will remain being popular for a long time, this is associated with city plans for further construction of new shopping centers and malls, as well as new business area, exhibition centers, and hence, the development of outlying areas and the emergence of new platforms. Middle level restaurants should put a considerable effort to divert customers from this segment. However, the trend of fast food is already cooling down and t in order to win customer over, the middle level restaurants should improve management and focus on attracting and forming their own clientele who will become loyal to their brand.

New Business opportunities in Uzbekistan

Over the past five years major changes have occurred in Uzbekistan, and now this country is more open than ever to international business.

Antal, a leading executive recruitment agency already has considerable work experience in Uzbekistan and can help you to enter this promising market, to recruit staff and make a salary surveys in this region.

Today, Uzbekistan ranks third in the world export of cotton, 4th place in gold reserves and 7th place in uranium reserves. In terms of natural gas production Uzbekistan ranks in 11th place.

At present, two large-scale projects are being implemented in the country: Tashkent City and High Tech City complexes. It is planning to build the largest cement plant in Central Asia. In addition, the construction of the automobile plant Uzbekistan Peugeot Citroen Automotive began production in the free economic zone "Djizak" in July last year.

Global companies are entering the Uzbek market, including the world-famous automobile brand Volkswagen, the international chain of KFC food restaurants, and Arla which is one of the world's top three dairy producers.

The Uzbek authorities are trying to create a positive environment for the development of entrepreneurship.

Recent developments in Uzbekistan include:

• A moratorium on all state business audits for the next two years has been introduced

• The taxation system has been simplified

• Free economic zones ("Navoi", "Angren", "Djizak") were created

• The major part of customs duties and fees for exporting enterprises has been reduced

• The procedure for registering companies through an online service was accelerated

In connection with the increase of foreign investment and economic growth in Uzbekistan, the issue of staffing is becoming more acute and there are also difficulties with the calculation of salaries.

Antal however, with our specialization in the selection of middle to senior candidates is in a strong position to help to solve such problems.

Interview with a successful Uzbek restaurateur who opens restaurants around the world

Timur Abdullayev

Occupation: Entrepreneur, restaurateur, consultant, representative of the chamber of Commerce of Uzbekistan. Age: 35 years

Horoscope: Capricorn

Favorite phrase: Favorite phrase: I know I don't know anything!

Marital status: Married, 2 children

-Timur, good day! Tell us what your childhood was like?

Hello! My childhood was carefree and fun-football, Cossacks, robbers, friends. I was also fixated on my studies, I liked to study, so I finished school with a gold medal.

-What did you dream of doing in your youth?

I didn't have any specific desires about my profession yet, but I really wanted to become a successful person and an idyllic representative of my family name.

-How did Your career start?

My career started at school. At the age of 16, I started working in the tourism industry, where I stayed for 4 years. During this period, he entered the Russian Academy of Economics. Plekhanov. At the age of 20, the era of radio business began in my life — I was offered the position of commercial Director at radio " Uzbekim Taronasi "and a little later Deputy Director at Autoradio"Hamrokh". After radio, I became the head of the marketing Department in the company "ITE Uzbekistan".

-How did You come to the restaurant business? What attracts you to this?

In 2008, I finished my job at ITE Uzbekistan and went into the restaurant business. I started working in a holding company that combined 4 restaurants - "Gasthous", "Peggys", "J. Smokers" and "Dudek". I managed the HR Department and was also responsible for business development. Why the restaurant business?

They say they don't become restaurateurs, they are born with them.

- You are engaged in launching restaurants, tell us about the projects you have implemented.

My first experience was the restaurant "Gasthaus", which was launched by a great team in 2005, also "Peggys", "J. Smokers", "Dudek". I was lucky to be part of this team and go through a good school. Then there were independent projects in Tashkent "Shedevr garden", "Khan Atlas", the first Uzbek restaurant" Samarkand "in Prague (Czech Republic) and a chain of Uzbek restaurants" Zhara " in Kiev (Ukraine).

In fact, this is a very interesting process, you need to start everything from scratch. It is especially exciting to do this in an unfamiliar environment, as I did once in the Czech Republic, where I found myself for the first time. I learned the customs, traditions, people, rules of doing business in the country, collected this knowledge bit by bit, in order to open the first Uzbek restaurant in Prague.

Launching an institution of our national cuisine abroad is not only a business for me, but also an opportunity to open an astronomical Embassy of Uzbekistan abroad. Present our culture and delicious cuisine.

-Don't you feel sorry to leave the place later?

At first I was sorry, but then I began to understand that this is a business, and you need to be able to leave when the time comes. And I only take on those projects that I have a heart for. If I have taken it up, it means that I am sure that it will remain in safe hands.

-Would you like to open your own restaurant?

Actually, I'm thinking about it. There is such an idea.

- Why haven't I opened my restaurant yet? Having opened an institution, a person is completely immersed in the care of it and its development. And I, at this stage, am not only engaged in launching restaurants.

I have a number of other projects.

-One of them is the Academy of restaurant business. Tell us about it, what was it created for?

The Academy is primarily a project created for professional restaurant and hotel consulting. The Academy's experts are leading Uzbek and international experts known for their professionalism far beyond the CIS.

One of the important tasks of the Academy is social educational projects. Together with the chamber of Commerce and industry, we have launched "Author's meetings with famous restaurateurs and hoteliers", to which we invite students of specialized universities and colleges, young professionals who are interested in getting new knowledge, information, so to speak, first-hand.

We have already held several events with the participation of Oleg Nazarov-the leading restaurant author and critic in Russia, Timur Musin-the founder of the Caravan group network and Chairman Of the Association of restaurateurs and hoteliers of Uzbekistan, Sergey Emelianenko — one of the best bartenders in Russia, Irina Ovsyannikova and Ikrom Agzamov-international hotel experts.

I often face a personnel problem — there are not enough professional bartenders, waiters, managers. Often, many young people come to work in restaurants or hotels without understanding what is required of them. One of the tasks of the Academy is to reveal and convey to the youth the nuances of this business. This is necessary so that people consciously come to it, and not because there is nowhere else to go to work.

-The restaurant business has its own fashion trends. How quickly do global trends reach Uzbekistan? What is fashionable now with us?

We have very popular steakhouses, American, Italian restaurants, Japanese cuisine. Many coffee shops have opened recently. Many of them offer a salad or a hot dish. But in my understanding, a classic coffee shop is coffee, dessert and nothing more. We don't understand this yet.

At one time, molecular cuisine was popular in many countries of the world, but it never reached us. And thank God!

By the way, in Moscow now Uzbek cuisine is one of the three most popular, which undoubtedly pleases me.

- Are there any special features of business in Uzbekistan?

We don't really have many the restaurant restaurants, more cafes, canteens, or so-called Milliy Taomlar catering outlets. Given the characteristic feature of our mentality, it is important to find the right approach to the guest, I emphasize, it is to the guest, not to the client. It is assumed that the client pays, and the guest sits for free. But we have hospitality in our blood and every visitor is a guest for us. In Uzbekistan, most products are purchased on the market, while in Europe, for example, delivery is ordered over the Internet.

-What determines the success of a restaurant?

A good restaurant is not only delicious food and an ashtray changed in time, it is an atmosphere that is created by such details as the correct form of the staff, the timely dimmed lights, and music. It's an aura. For me, the aura of the restaurant is the emotions of the guests that permeate the entire room.

In a restaurant, a person should spend money with pleasure. And you need to treat your guest the way you want to be treated for your own money.

If a person returns to your institution, it means that they trust you with their time, comfort, and good mood. Justified guest trust is the Foundation of the restaurant business.

The winner is the one who will give consistently high quality, in food, service, ideas– this is the Foundation of the basics.

- What advice Can you give to aspiring entrepreneurs?

Go for it! Recently, the English championship was won by an unknown team "Leicester". I just won. This proves that money and connections are not always important. You need to believe in yourself, understand where you are going and why. You should never regret your mistakes. We need to draw the right conclusions and move on. And the most important thing is to be an extremely honest person with others and with yourself.

Conclusions

Market for restaurant services in Uzbekistan when compared to the EU market stands at the level of infancy. Moreover, market is affected by two conflicting factors. On one hand, the limiting factors are low income of citizens and having no tradition of eating out. On the other hand, market development is strongly influenced by subjective factors in the form of low-level management of restaurants, lack of professional training and motivation, etc. The segments of the market showed that in general, Uzbekistan holds traditional pyramid of restaurants with different prices, from elite restaurants to catering restaurants, coffee shops and bars. At the same time, when compared with the EU restaurant services, some services in particular segments have their own characteristics. For instance, the middle price segment of restaurants mainly provides services for the organization and celebration of banquets for weddings, birthdays, and anniversaries. Further, low level or low priced restaurants are not acting as fast food places, where people quickly eat and go, most of the time it acts as a place for young people to spend time, "hang out" thereby replacing the the place of middle level restaurants. To conclude, the weakest factor on the market of restaurant services is the lack of quality management. Market for restaurant services in Uzbekistan should start using accumulated knowledge of strategic and operational management and its basic model. This will greatly reduce the high level of bankruptcy, lack of permanent clientele and low culture of restaurant services.

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Viktoryia Sedova. OPPORTINITY TO INCREACE CUSTOMER SATISFACTION IN COMMERCIAL BANKS IN BELARUS

EKA University of Applied sciences, Management, viktoryia.sedova@gmail.com

Scientific advisor: Mg. sc. soc., Assistant Professor Sergejs Paramonovs

Abstract

Research relevance: According to the statistical data, 11 potential buyers could know about the negative experience of the customer of this company and also tell other people about it, that is the number of potential buyers with negative information about a company will grow. For the above reasons, the bank should to know the level of satisfaction of its customers in order to retain existing customers by satisfying the needs for which they apply to the bank.

Research goal: Based on the analysis of the problems of customer satisfaction level in a world to identify opportunities to increase customer satisfaction in commercial banks in Belarus.

Research methods: To identify the customer satisfaction level of commercial banks the author used data collection methods: document analyses, questionnaire and data processing methods: descriptive statistics, graphic analysis, comparison and correlation analysis.

Main findings: The research describes the structure of the sector of commercial banks in the Republic of Belarus and reveals the level of customer satisfaction of Belarusian banks in general and for various products and services.

Keywords: Customer satisfaction; commercial bank; analysis of customer satisfaction level; Belarus.

Introduction

The Belarusian market has remained unstable for many years and this cannot affect to commercial banks (World Bank, 2018). One of the main reasons is the strong influence of the state, which is that there are many companies in the country whose main authorized capital belongs to the state and accordingly these companies enter into contracts with so-called state banks. In these conditions state-owned banks are not afraid of losing customers and therefore do not always pay due attention to customer satisfaction, the rest of the banks need to be engaged not only in attracting customers, but also to create better conditions for obtaining a satisfied and loyal customer. Knowing this information it becomes relevant to research how the current situation affects the banking sector as a whole.

The aim of the research is to identify opportunities to increase customer satisfaction in commercial banks in Belarus.

The hypothesis of this research is that customer satisfaction with a commercial Bank affects the ability to recommend this bank to other people.

According to the survey results, 28,8% of respondents rate their satisfaction with the Bank as 7 and the average level of customer satisfaction with its main commercial bank in Belarus is 7,8; Mo = 7; Me = 7.

Literature Review

According to Cambridge dictionary "**customer satisfaction** is a measure of how happy customers feel when they do business with a company" (Cambridge dictionary, 2020). Another author says that **customer satisfaction** is a means of evolution quality. If customer satisfaction is high the company's profit will grow (Cengiz, 2010).

As for the definition of **satisfaction** Chang says that "satisfaction referred to a consumer's judgment that a product or service feature, or the product or service itself, was providing a pleasurable level of consumption-related fulfillment, including levels of under- or over-fulfillment" (Chang et al, 2010).

Attracting new customers is usually more expensive for company than keeping current customers for this reason the definition of Customer satisfaction index or CSI was created (Turkyilmaz et al, 2013). This concept helps companies identify weaknesses of the marketing complex and adjust it to improve quality of products and services as well as increase quantity of satisfied customers.

Companies are creating programs to improve customer satisfaction with the help of which they can (Hill & Brierley, 2017):

- understand how clients feel about the company;
- find out which areas need improvement;
- find out how much money is need to improve the company's work;
- identify is staff aware of clients' priorities;
- monitor customer satisfaction index and develop service improvement tasks;
- ultimately increase profits.

According to another author (Cengiz, 2010), by measuring customer satisfaction, companies can know:

- where to make changes to create improvement;
- how well the business process is working;
- understand whether the changes have led to better.

When company creates questions for the measurement customer satisfaction programs these have to answers: who, how, what, where when and why (Cengiz, 2010).

For successful existence, companies need to track how satisfied customers are with their products or services, the work of the enterprise as a whole. Knowing this information an organization can influence the satisfaction of its client and help him become loyal to the brand. To do this, various authors have identified factors affecting customer satisfaction (Метель, 2016):

- quality of service;
- speed of service;
- assortment of services;
- favorable conditions compared to competitors;
- pricing;
- courtesy of employees;
- goodwill of employees.

David Aaker created the brand guidelines or Aaker's model (Aaker, 2012) which also described the behavior of companies to meet customer satisfaction. His principals consist of:

- creating associations with brand (anchors);
- creating awareness with brand that customers may follow with other people;
- collecting customers reviews for working process improvement;
- creating brand with more extensions because customers brands with more extensions;

– building attitudes with customers.

Different researches on customer satisfaction show that satisfaction and trust stay on the same line, and when a customer is satisfied and trusted, they will be loyal. For example, to achieve customer satisfaction, company should follow the next principles (Yildiz, 2017):

– reliability;
– tangibles;
– responsiveness;
– assurance;
– empathy.

In modern literature are highlighted instruments that affect customers and are able to stimulate communication between company and clients. In Phillip Kotler and Gary Armstrong opinion are (Kotler & Armstrong 2010):

– personal selling;
– advertising;
– sales promotion;
– public relations.

With the introduction of these instruments, customer begins to treat with confidence in the organization, the awkwardness between them disappears, the understanding of why this organization is beneficial for him comes, also how it is possible to use the offered product or service.

In the banking sector as well as in any other commercial activity, customer satisfaction plays an important role in the development of activities and the possibility of the company's existence in the market with a high level of competition in the future.

Considering the topic of customer satisfaction, the author of the study believes that satisfaction is a necessary part of human life, and companies should take this into account when they build strategic and brand awareness models. The author of the research can also say that customer satisfaction is a general assessment of such indicators as the quality of the service or product provided, additional offers related to these products or services, and the customer's experience gained when communicating with the company's employees.

Research methodology

Statistical data of the National Bank of the Republic of Belarus were used for this research. In addition, a survey was conducted on the online platform Google Forms to determine customer satisfaction, in which 115 respondents took part. In addition, the following statistical tools were used to analyze the survey results: average, mode and median. The study also provides a correlation analysis between two indicators, satisfaction with the bank and the ability to recommend it to other people. To visualize the information, graphs were developed that show the main data related to this study.

Research results

The banking system in Belarus divided into 2 parts: Central bank (The National Bank of the Republic of Belarus) and commercial banks. Nowadays there are 24 commercial banks in Belarus (National Bank of the Republic of Belarus, 2020) below is a graph with the number of banks on January 1 in the last 5 years and the form of their ownership (Figure 1). The names of the columns mean:

- state is banks with a predominant share in the authorized capital of state bodies and legal entities based on state ownership;
- private is banks with a predominant share in the authorized capital of foreign capital
- other is banks not included in groups 1 and 2.

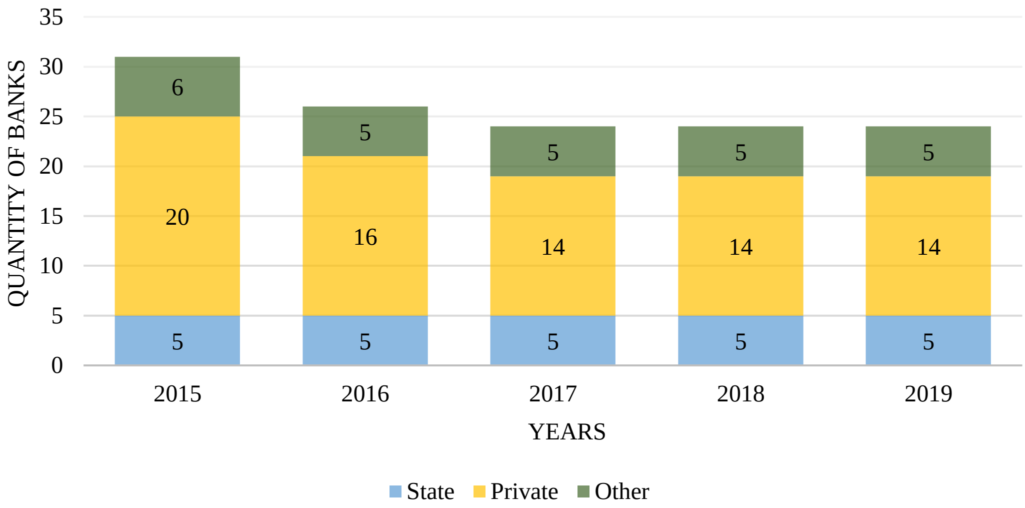

Fig. 1. Quantity of commercial banks in Belarus from 2015 to 2019 (Source: author's collection on the basis on The National Bank of the Republic of Belarus, 2019)

In the period from 2015 to 2019 the banking sector of the Republic of Belarus has undergone changes namely the number of commercial banks has decreased. In particular, in the period from 2015 to 2016 the number of private banks decreased by four and from 2016 to 2017 by two less and by the beginning of 2019 their number remained unchanged. Among other banks, changes occurred only in the period from 2015 to 2016 there was one less bank. In the period of study by the author, only the number of state banks has not changed, their number has remained equal to five.

To conduct the research, the author compiled the survey. According to the author, the results of the survey could reflect the real image of customer satisfaction of commercial banks in Belarus.

In the survey participated 51% of men and 49% of women. The average age of the respondents is 27 years old. Families of participated consists of 3 people with a monthly income of 1000 – 2000 BYN (around 450 – 900 EUR) and live in Minsk.

The first question is "Which banks are you a customer?" 55% of respondents answered this question that they use the services of two or three banks and 53% have an account in Belarusbank.

In the second question about main bank 51% of respondents answered that their main bank is Belarusbank, 10,2% - Alfa-Bank and 8,2% - Belinvestbank. This results not surprising because many companies (frequently state-owned companies) in Belarus are served in Belarusbank and people could get salary, scholarship, pension and etc. if they have bank account in this bank.

Also, the author asked about customer satisfaction with the main bank, the results of which are presented below (Figure 2). The rating range is from 1 to 10, where 1 is not satisfied and 10 is completely satisfied. Higher results were obtained by 7 with 28,8% of respondents, 9 with 17,3% and 10 with 14,4%.

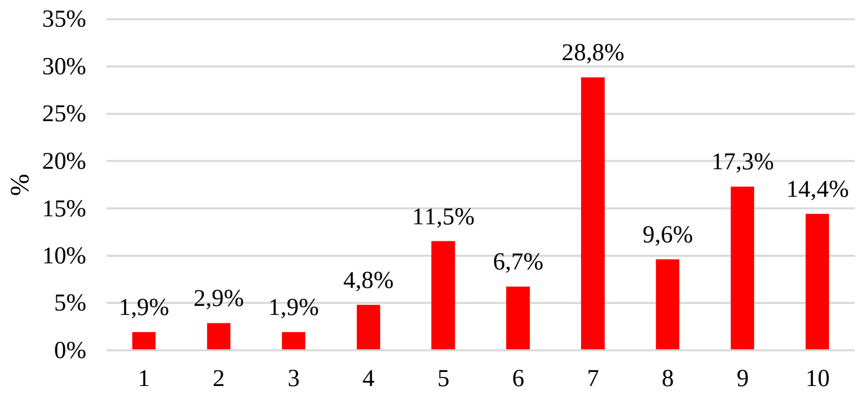

Fig. **Error! No text of specified style in document.**. General customer satisfaction with the main bank (Source: author's collection)

Average level of customer satisfaction with the main bank is 7,1. For a deeper research, the author thus calculated the mode and the median, where the mode is the most common value and the median is the middle number in sorted and the decreasing value will be less than the median, the increasing value will be greater. In this case Mode (Mo) = 7 and Median (Me) = 7.

Thus, the author asked about how much will respondents recommend their bank to relatives, friends. The rating range is from 1 to 10, where 1 is not recommend and 10 is completely recommend. The results show that the majority of respondents (26%) noted the number 10, 17,1% - 6 and 15,4% - 8. Average level is 7,4. The author of the research decided to find out the correlation between bank satisfaction and the ability to recommend the bank to other people. A correlation analysis of the data showed a result of 0.6, which means that the degree of influence is higher than the average results.

One of the important question is what banking products customers use. For the survey the author chose main types of banking services (Figure 3) such as Bank card for salary or scholarship, credit or debit card, bank account, loan, money transfer, exchange money, leasing transactions, internet and mobile banking.

The highest results were obtained by a Leasing transaction with 8,7 level of customer satisfaction and 8,4 is Bank card for salary, scholarship, etc. what cannot be said about other services. For example, the less results were obtained by Bank account with 5,6 level of customer satisfaction and 5,7 is Loan. Average level of customer satisfaction by all banking services is 7,4.

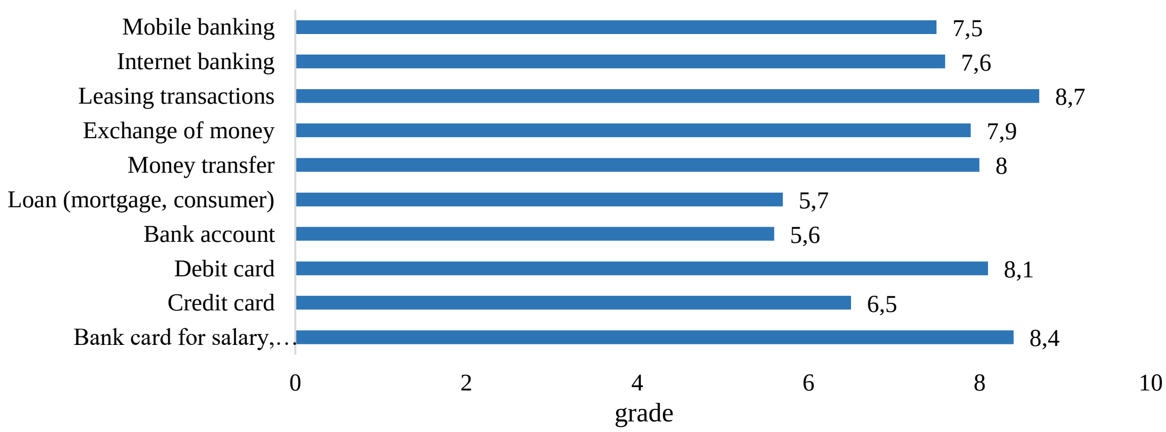

Fig. 3. Level of customer satisfaction by banks products (Source: author's collection)

Next, respondents were asked to rate from 1 to 10 how important they are and how satisfied they are with the services provided to banks (Figure 4) where 1 is not important / satisfied and 10 is completely important / satisfied. Average grade of satisfaction level is 7,6; Mo = 8, Me = 7,8 and importance for customer is x = 7,8; Mo = 8, Me = 7,9.

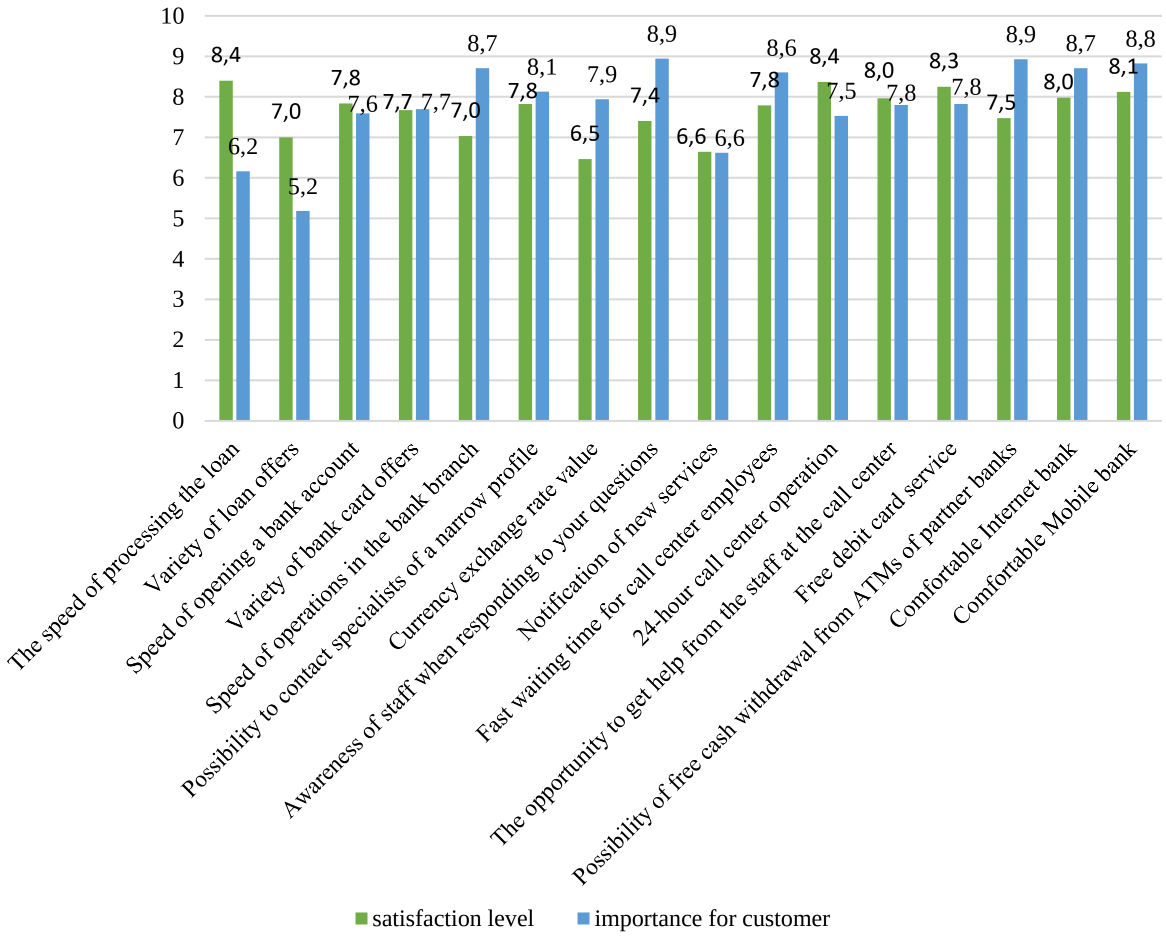

Fig. 4. Dynamic of customer satisfaction level and importance of service for the customer (Source: author's collection)

To the questions "What should be the interest rate on a consumer loan that you change your mind to make it?" the average value is 9,6; Mo = 10, Me = 10. About montage loan x = 10, Mo = 8, Me = 8 and credit card x = 8, Mo = 5, Me = 7.

Nowadays, there are no online commercial banks in Belarus, for this reason, branches and ATMs are important for customers. Respondents estimated the Quantity of bank branches at an average of 7,4, Office hours in this branches at 6,5 and the ATM network at 6,6.

It is also impossible to ignore the service in the bank so the respondents rated the Politeness of the bank's employees at 7,3 and the Neat appearance at 8,8.

The next question is "What would you recommend to improve the performance and / or service in your main bank?" according to the respondents, commercial banks in Belarus should improve their staff policy (teach employees how to communicate with bank customers). this issue is of most concern to respondents, solve the problem of queues in the bank, integrate modern systems in Internet and mobile banking and introduce new payment systems such as Apple Pay and Google Pay.

Conclusions

If evaluate this survey as a whole, customers of Belarusian banks are satisfied with a score of 6,8 but as this study shows they expect more from the services they use. At the same time, they will recommend a bank where they are customers for an average of 7,4

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