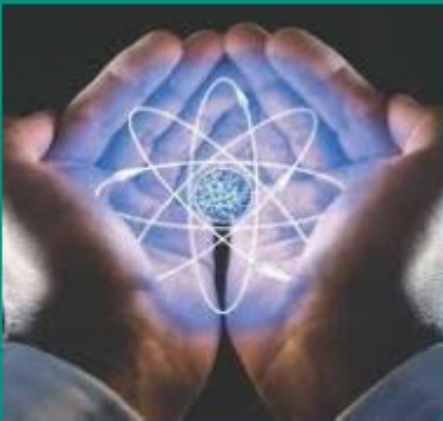


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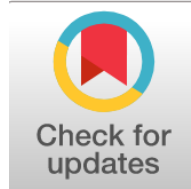
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# **Tourism Growth Challenges and Strategic Development Priorities in Uzbekistan**

## *Tantangan Pertumbuhan Pariwisata dan Prioritas Pengembangan Strategis di Uzbekistan*

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### **Abstract**

General background: Tourism has become a vital driver of economic growth and socio-cultural integration globally. Specific background: Uzbekistan, endowed with rich cultural and historical assets, has made tourism a strategic priority, especially in the post-independence era. Knowledge gap: Despite institutional reforms and increasing tourist numbers, Uzbekistan's tourism sector still faces challenges in infrastructure, digitalization, service quality, and international marketing. Aims: This study aims to analyze the mechanisms for enhancing foreign tourist inflow and improving tourism services in Uzbekistan by identifying systemic weaknesses and proposing evidence-based solutions. Results: Using a mixed-methods approach, the study finds that while tourist numbers and revenue have rebounded post-pandemic, service quality remains uneven, regional disparities are significant, and average revenue per tourist is low. Novelty: The study contributes by integrating regional tourism data with strategic policy recommendations that emphasize digital transformation, human capital development, and national branding. Implications: These findings highlight the need for comprehensive reforms focusing on sustainable, inclusive, and digital tourism models to unlock Uzbekistan's full tourism potential and position it competitively in the global market.

### **Highlights:**

- **Tourism Growth:** Uzbekistan reached 6 million foreign tourists and \$1.27B in revenue by 2023, yet average tourist spending remains low.
- **Main Challenges:** Service quality gaps, weak infrastructure, lack of digital tools, and insufficient skilled personnel hinder tourism advancement.
- **Strategic Focus:** Boosting digital tourism services, regional equity, international branding, and sustainable tourism are essential recommendations.

**Keywords:** Tourism Potential, Digitalization, Human Capital, Marketing Strategy, Regional Development

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## Introduction

Global experience demonstrates that the tourism sector not only contributes to economic growth but also plays a key role in ensuring social stability, promoting cultural exchange, and protecting the environment. Through its multiplier effect, tourism stimulates the development of several related sectors such as transportation, trade, payment services, handicrafts, and the food industry, thereby positively influencing the country's gross domestic product (GDP) [1].

Today, the global tourism services market is experiencing intense competition. Countries are no longer competing solely on the basis of natural beauty and historical heritage, but also on the quality of infrastructure, the availability of digital services, guarantees of safety, and the culture of service provision. From this perspective, for Uzbekistan to occupy a competitive position in the global tourism market, it is crucial not only to utilize its existing potential effectively but also to prioritize modern services, digitalization, innovative approaches, and human capital development [2].

Uzbekistan is geographically and culturally well-positioned. Interethnic and interreligious harmony, a high level of safety, widespread implementation of visa-free and e-visa systems, and the gradual development of transport infrastructure are important factors enhancing the country's competitiveness in the tourism industry. In addition, a number of presidential decrees and orders, along with programmatic documents such as the *"Concept for the Development of Tourism in 2022-2026,"* have strengthened the legal and institutional foundations of the sector [3].

Furthermore, supporting small business entities in tourism, developing regional tourism clusters, and integrating traditional crafts and national customs into economic activity have created opportunities to view tourism as a key driver of socio-economic development. Especially in the post-pandemic global context, the stimulation of domestic and international tourism, the revival and improvement of sanatorium-resort services, and the introduction of alternative directions such as "green tourism" and agrotourism have become central issues.

Nevertheless, there are several challenges that hinder the full utilization of existing opportunities. These include underdeveloped tourism infrastructure, logistical difficulties, low quality of service delivery, shortage of skilled personnel, and the absence of modern advertising and marketing strategies all of which obstruct the realization of Uzbekistan's tourism potential [4].

Tourism has become a vital factor in global economic growth, cultural dialogue, and international integration. By nature, it is a multi-sectoral and complex field, closely linked to the development of a country's international image, investment appeal, transport, and service infrastructure. For developing countries in particular, tourism is viewed as an effective tool for economic diversification and increasing foreign exchange revenues. In this regard, a scientific analysis of ways to increase the inflow of foreign tourists and improve tourism services in Uzbekistan is not only important but also an urgent task [5].

## Literature Review

In recent years, the development of tourism in Uzbekistan has been at the center of attention among both national and international researchers. Scientific studies in this field have addressed various aspects, including economic analysis, legal frameworks, marketing and branding, infrastructure development, and human resource training. However, a critical review of the existing literature reveals that there are still unresolved issues and underexplored directions in the tourism sector.

In his monograph *"Prospects for the Development of Tourism in Uzbekistan,"* R.F. Kholiqov provides a structural analysis of the country's tourism products, emphasizing the need to improve service quality in both domestic and international tourism. He argues that infrastructure deficiencies and underdeveloped tourism logistics systems negatively affect tourist inflows [6]. While his arguments are supported by practical analysis, the role of digital technologies is insufficiently addressed.

M.Q. Alimov has explored the legal mechanisms in the tourism sector, questioning the effectiveness of state-provided incentives and benefits. Although he acknowledges the well-developed legislative base in Uzbekistan, he highlights bureaucratic barriers and inefficiencies in enforcement mechanisms as key challenges. His analysis offers practical recommendations for improving legal implementation in the sector [7].

International organizations such as UNESCO and the UNWTO have emphasized the importance of sustainable tourism development in Central Asian countries, including Uzbekistan. Their reports recommend the responsible use of natural resources, preservation of cultural heritage, and promotion of eco-tourism. The 2023 UNWTO report classifies Uzbekistan as an "emerging tourism market," while noting shortcomings such as the underdevelopment of electronic payment systems, digital guides, and interactive information platforms. These critiques provide valuable input for the development of practical roadmaps [8].

S.Sh. Yunusov's research focuses on the role of marketing and promotional activities in increasing foreign tourist inflows. His theoretical conclusions highlight that Uzbekistan's tourism brand lacks international recognition and strategic marketing direction. These findings are supported by the country's limited visibility in international advertising platforms [9].

Analyses by the International Monetary Fund (IMF) and the World Bank emphasize tourism's economic significance, including its role in job creation and support for local businesses. However, they also note the sector's limited appeal for foreign investment due to low levels of investment facilitation and the presence of corruption risks [10]. These sources underscore the necessity of wide-ranging institutional reforms to enhance Uzbekistan's attractiveness for international capital.

T.Q. Mirzaev's research investigates the potential of pilgrimage tourism in Uzbekistan. He argues that Islamic heritage sites in cities such as Bukhara and Samarkand could become globally recognized pilgrimage destinations. However, he critically notes the underdevelopment of logistics, sanitation, hotel, and guide services in the sector [11]. Despite these insights, digital solutions and promotional platforms are not sufficiently discussed in his study.

A.A. Qodirov's studies focus on human capital in tourism, particularly the training of qualified personnel. He highlights that many employees in tourism companies lack the ability to effectively communicate with international clients and have insufficient foreign language skills. He recommends the implementation of practice-oriented training systems aligned with international models. Although relevant, the regional dimension of human resource development is not thoroughly analyzed in his research [12].

Sh.X. Qurbanov's studies on regional tourism emphasize the potential of "cross-border tourism" in the Fergana Valley. He advocates for cooperation with Kyrgyzstan and Tajikistan in launching joint tourism routes [13]. While this is considered an innovative approach, the necessary institutional and legal frameworks for such collaboration are not adequately examined.

In his analytical work on international tourism marketing, S. Burkhanov assesses Uzbekistan's external tourism promotion activities as weak. He points out that the country lacks a unified tourism brand concept and that promotional materials and digital content do not meet modern standards. His proposals include the use of multimedia, AR/VR technologies, and active social media campaigns [14].

In their book "*Tourism and Economic Development*," A. Williams and G. Shaw thoroughly explore tourism's role in economic diversification. They argue that in developing countries, tourism is not only tied to infrastructure, but also closely linked to regional policy, financial stability, and education [15]. While their theoretical models are applicable to Uzbekistan's context, they do not specifically address the unique conditions of the country.

## Research Methodology

The research developed by the study, to investigate mechanisms that can augment the flow of the foreign tourists and improve tourism services in Uzbekistan, adopts a complex, step-by-step approach, which combines an integration of qualitative and quantitative research tools. To formulate a clear perspective of what has been achieved and transformed over the years in terms of tourism in the country, the paper uses historical and logical analysis to follow the turn of events so far as far as tourism in the country is concerned. Inductive and deductive reasoning help obtain wider conclusions by basing them on the case-specific data and development patterns, such as regional differences and periodical changes in tourist arrivals. Descriptive and inferential methods are employed to make conclusions of statistics data which depict the number of visitors and expenditures 2018-2023 and hence create causal relationships between tourism reforms and consequences. With the help of comparative and classification methods, it is possible to evaluate the effectiveness of tourism in the country, especially in the region and world standards, with a certain focus on the state of the infrastructure, the quality of services, and digitalization. Monographic study is applied as a very careful analysis of major issues is conducted, particularly in the area of deficient human capital, vacuum in marketing, and weak infrastructures. The best practices and the areas to be improved, based on the experience of other countries and policy documents, like the UNWTO reports and the national tourism development strategies, can also be identified through the use of a selection methodology. Additionally, the study also uses primary data collections of the Tourist Committee and secondary literature by both local and foreign researchers, which develops a fair and fact-oriented evaluation. Such an in-depth set of tools is methodological which provides the foundation of coming up with practical recommendations having a context sensitivity or future oriented aspect to them.

## Analysis and Results

Since gaining independence, Uzbekistan has paid special attention to developing the tourism sector based on its rich cultural heritage, natural resources, and historical monuments. However, in the last five years, significant transformations have occurred in this sector: since 2016, tourism has been designated as a priority area in state policy; a separate Ministry of Tourism and Cultural Heritage was established at the government level; visa-free and

electronic visa systems have been expanded; and visa-free regimes were introduced for citizens of more than 90 countries. As a result of these political decisions, the number of foreign tourists visiting the country increased 2.5 times during 2017-2019.

This indicates that tourism is a new economic opportunity opening wide doors for Uzbekistan as a broad and strategically important sector. Through its development, employment can be ensured, export-oriented service volumes can be increased, currency revenues can grow, and handicrafts and national service sectors can be stimulated. Additionally, the country's international image can be strengthened, cultural diplomacy enhanced, and tourism branding developed through tourism.

It should be emphasized that the 2020-2021 pandemic seriously tested the tourism sector. However, in the post-pandemic recovery period, Uzbekistan has the potential to fully realize its tourism capacity. According to international analysts, safe, culturally and historically rich tourism destinations in Central Asia are becoming an important alternative for tourists. Uzbekistan can take a leading position in this process. However, for this, the country needs to improve the quality of tourism services and have a clear strategy in logistics, digital technologies, human capital, and international marketing.

At the same time, many problems remain to be solved in the sector: insufficient convenient information environment for foreign tourists; uneven quality of tourism services; insufficient number of hotels in certain regions; shortage of guides, tour leaders, and interpreters; and limited recognition of Uzbekistan's brand in the global tourism market (Table 1).

Year	Number of Foreign Tourists (million people)	Tourism Revenue ( billion USD)
2018	5.3	1.04
2019	6.7	1.31
2020	1.5	0.34
2021	1.9	0.41
2022	3.9	0.85
2023	6.0	1.27

**Table 1.** Dynamics of the Number of Foreign Tourists Visiting Uzbekistan and Tourism Revenue in 2018-2023

Source: Data from the Tourism Committee under the Ministry of Ecology, Environmental Protection, and Climate Change of the Republic of Uzbekistan.

According to the data presented in the table, Uzbekistan's tourism potential is increasing year by year. However, the growth rate in this sector is closely linked to external factors, the state of internal infrastructure, and service quality. Specifically:

1. Tourist flow and the impact of the pandemic. In 2018 and 2019, the number of foreign tourists was 5.3 million and 6.7 million respectively. These figures represent one of the highest levels achieved in the last twenty years and are associated with the introduction of a visa-free regime and international advertising campaigns. However, due to the pandemic in 2020-2021, these numbers sharply declined to 1.5 million and 1.9 million respectively. This decline of nearly 70% aligns with global trends.
2. Recovery of the sector and 2023 results. In 2022 and 2023, the flow of tourists began to recover, reaching 3.9 million and 6.0 million respectively. These figures indicate that Uzbekistan was able to restore tourism activity in the post-pandemic period. In particular, the 2023 results approaching the 2019 level confirm the effects of political stability and eased visa regulations.
3. Revenue analysis. Tourism revenue changed accordingly: \$1.04 billion and \$1.31 billion in 2018-2019; dropping to \$0.34 billion and \$0.41 billion in 2020-2021; and rising again to \$0.85 billion and \$1.27 billion in 2022-2023. The proportionality between revenue and tourist numbers indicates that service quality is still not stable. In other words, although the number of tourists is increasing, the average revenue per tourist remains relatively low.

During the research, the following problems were identified:

Based on the identified problems, the following recommendations were developed:

1. Tourism services do not yet fully comply with international standards;
2. Hotel and logistics infrastructure is insufficient in some regions;
3. Tourism information technologies, mobile applications, and virtual guides are lacking;
4. There is a shortage of qualified personnel and foreign language skills;
5. Communication and guidance systems for tourists are ineffective.
6. Implement electronic guide services, mobile applications, and interactive maps;
7. Train personnel in tourism colleges and universities according to international standards;

8. Expand hotels, airports, and road infrastructure through local budgets and private investments;
9. Actively promote the Uzbekistan brand on global tourism platforms (TripAdvisor, Google Travel, Booking.com);
10. Actively promote local handicrafts, gastronomic tourism, and agro-tourism sectors (Table 2).

No	Region Name	Number of Tourists ( thousands )	Share (%)
1	Tashkent City	1,800	30.0
2	Samarkand Region	1,100	18.3
3	Bukhara Region	850	14.2
4	Khorezm Region (Khiva)	600	10.0
5	Tashkent Region	350	5.8
6	Republic of Karakalpakstan	300	5.0
7	Fergana Region	200	3.3
8	Andijan Region	150	2.5
9	Namangan Region	100	1.7
10	Kashkadarya Region	100	1.7
11	Surkhandarya Region	80	1.3
12	Jizzakh Region	70	1.2
13	Syrdarya Region	60	1.0
14	Navoi Region	90	1.5

**Table 2.** *Distribution of Foreign Tourists by Regions in Uzbekistan in 2023*

Source: Data from the Tourism Committee under the Ministry of Ecology, Environmental Protection, and Climate Change of the Republic of Uzbekistan.

Based on the data presented in the table, the following conclusions were drawn:

1. The central cities - Tashkent, Samarkand, and Bukhara - attract about 62% of tourists. These locations have airports, hotels, tour guides, and rich historical heritage.
2. Historical centers - Khiva, Bukhara, and Samarkand - serve as the main points for pilgrimage and cultural tourism.
3. The Fergana Valley regions (Fergana, Andijan, Namangan) account for approximately 7.5% of the total flow. These areas require strengthening of service infrastructure.
4. Karakalpakstan and Navoi are promising regions for ecological and domestic tourism but suffer from weak marketing and logistics (Table 3).

Year	Average Spending per Tourist (USD)
2018	196
2019	195
2020	227
2021	226
2022	218
2023	212

**Table 3.** *Average Spending of Foreign Tourists Visiting Uzbekistan ( 2018-2023)*

Source: Data from the Tourism Committee under the Ministry of Ecology, Environmental Protection, and Climate Change of the Republic of Uzbekistan.

Based on the data presented in the table, although the number of tourists decreased in 2020-2021, their average spending was higher. This was due to restrictions on tourism services during the pandemic and the fact that most visitors came for business or official purposes. In 2023, while the number of tourists increased, the average spending decreased. This could be attributed to cheaper tour packages, shorter visits, and the rise of mass tourism. The average revenue per tourist remains low, which is linked to the limited pricing of tourism services and the insufficient availability of additional services and products.

## Conclusion

The strategic development of the tourism sector in Uzbekistan has become one of the priority directions of state policy in recent years. The country's historical, cultural, and natural potential, geographical location, security environment, and transport connections create all the necessary conditions for Uzbekistan to occupy a distinctive place on the world tourism map. However, despite these advantages, this study clearly revealed a number of systemic challenges that still need to be addressed in the sector.

Analyses show that in 2023, the flow of foreign tourists recovered in the post-pandemic period, reaching 6 million, and tourism revenue amounted to 1.27 billion USD, which is a positive outcome. However, these figures do not yet indicate the full realization of the country's tourism potential. Average revenue per tourist, service quality, regional coverage, and international marketing activities remain below the desired level.

The analytical results also indicate that tourism services are still largely concentrated in central cities such as Tashkent, Samarkand, Bukhara, and Khiva, while regions like Karakalpakstan, the Fergana Valley, Surkhandarya, and Navoi have yet to fully exploit their tourism potential. In these regions, factors such as infrastructure, logistics, staffing, and information support are hindering the growth of tourist flows.

As emphasized by both foreign and local scholars, fully unlocking Uzbekistan's tourism potential requires more than just increasing the number of hotels or improving transport services. The sector demands the widespread adoption of digital technologies, the creation of a national tourism brand, a review of human resource training, and strengthening internal and external cooperation through institutional measures.

Based on the identified challenges, the following key strategic conclusions have been drawn:

1. Imbalance in Tourism Development - there is a significant disparity in tourism services, infrastructure, and service quality between developed central areas and lagging regions.
2. Marketing and Branding Deficiencies - Uzbekistan's tourism brand is still not firmly established internationally, as reflected in its presence on internet platforms and global exhibitions.
3. Lack of Digital Services - services such as QR codes, mobile applications, online booking, and informational guides are either absent or insufficient in most regions.
4. Human Capital Deficiencies - there is a shortage of highly skilled guides, tour operators, and service providers proficient in foreign languages.
5. Low Revenue Efficiency - despite the growth in tourist numbers, the average expenditure per tourist remains limited, indicating restricted additional services and spending opportunities.

The study proposes the following scientifically grounded practical recommendations:

1. Tourism Digitalization Policy - develop electronic maps, tourism route platforms, AR guides, and online information databases.
2. Integrated Tourism Clusters - establish cluster systems in each region combining tourism, handicrafts, food, transport, and services.
3. Education Reforms - introduce new programs in tourism education based on language skills, culture, psychology, and IT competencies.
4. International Cooperation - create cross-border tourism routes and joint itineraries with Central Asian countries.
5. Implementation of Sustainable Tourism Models - support alternative forms such as ecotourism, agrotourism, pilgrimage, and gastronomic tourism.

In conclusion, Uzbekistan possesses vast opportunities and potential in the tourism sector. To fully realize this potential, a comprehensive approach, science-based policies, and practical measures grounded in principles of regional equity and sustainable development are required. Only then will tourism genuinely become a strategic industry underpinning the national economy.

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