

# MARKETING

ILMIY, AMALIY VA OMMABOP JURNAL



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# THE ROLE OF THE STATE IN THE DEVELOPMENT OF TOURISM IN UZBEKISTAN

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## Abstract

The article examines Uzbekistan's tourism development with a focus on the Zomin ecotourism zone. It analyzes recent reforms, infrastructure improvements, and policy measures aimed at increasing tourist inflow and economic diversification. The study applies SWOT and trend analysis to assess achievements and challenges, proposing recommendations to enhance tourism sustainability and competitiveness.

**Keywords:** changes in the field of tourism, decrees and decisions of the president, the integral connection of tourism with the economy, and work plans focused on the field of tourism in the territory of the Republic of Uzbekistan.

## Annotatsiya

Ushbu maqolada O'zbekiston turizm sohasi rivojlanishi, ayniqsa Zomin ekoturizm hududi misolida tahlil qilinadi. So'nggi yillardagi islohotlar, infratuzilma loyihalari va turistlar oqimini oshirishga qaratilgan siyosiy chora-tadbirlar yoritilgan. SWOT va trend tahlil usullari asosida yutuqlar va mavjud muammolar baholanib, turizmning barqaror rivojlanishini ta'minlash bo'yicha takliflar ilgari surilgan.

**Kalit so'zlar:** turizm sohasidagi o'zgarishlar, prezident farmon va qarorlari, turizmning iqtisodiyot bilan uzviy bog'liqligi, O'zbekiston Respublikasi hududida turizm yo'nalishiga qaratilgan ish rejalari.

## Аннотация

В статье рассматривается развитие туризма в Узбекистане на примере экотуристической зоны Зомин. Проанализированы реформы последних лет, инфраструктурные проекты и меры по увеличению туристического потока и диверсификации экономики. С применением методов SWOT и тренд-анализа оценены достижения и существующие проблемы, предложены рекомендации по обеспечению устойчивого развития туризма.

**Ключевые слова:** изменения в сфере туризма, указы и постановления президента, неразрывная связь туризма с экономикой, планы мероприятий, направленные на развитие туризма на территории Республики Узбекистан.

## INTRODUCTION

Tourism encompasses various aspects of human activity. As a unique catalyst of socio-economic development, tourism significantly impacts the development of key sectors such as transport and communications, trade, construction, agriculture, consumer goods production, and other areas of the economy. One of the main directions for developing an export-oriented economy is the tourism industry. Tourism is also an essential component of business activity, constantly attracting an influx of foreign tourists.

In recent years, consistent measures have been implemented in Uzbekistan to develop the tourism industry. These include creating favorable conditions, increasing the competitiveness of the sector, improving the quality of services, and actively promoting national tourism products in the global market. Systematic efforts have led to significant achievements in increasing tourist flows, modernizing infrastructure, and liberalizing visa policies. For instance, in 2019, Uzbekistan ranked second among CIS countries in terms of visa liberalization, according to international ratings.

## LITERATURE REVIEW

In global research, special attention is paid to the tourism sector. Currently, in developed countries, numerous scientific studies are being conducted to analyze the impact of tourism on the economy, social sphere, environment, and other sectors. The main focus of these studies is whether social capital aligns with tourism-related policies. To investigate this issue, a group of researchers conducted a study involving 74 stakeholders across three U.S. states, Australia, and Oceania countries. The results demonstrated that these elements are interconnected, and the growth of social capital has an indirect but significant effect on the development of the tourism industry.

In his textbook, Y. Kujel revealed the role of tourism in the socio-economic development of a country and emphasized the importance of giving special attention to tourism as one of the fastest-growing sectors. According to N. Khaydarov, the number of foreign students in the country's education sector should be significantly increased. He notes that these students live like tourists during their four years of study. Furthermore, there is a high likelihood that their parents and close friends will visit during this period, further contributing to tourism.

According to the opinions of the reviewed experts, the development of the tourism sector has a direct impact on the growth of all other sectors of the economy. Today, it is necessary for Uzbekistan to utilize its existing tourism potential and showcase it to the world, drawing on the successful experiences of developed countries.

## METHODOLOGY

The research was conducted using a descriptive and analytical approach. Through the descriptive method, the current state of the tourism sector in Uzbekistan, its development prospects, and the initiatives undertaken by the government were analyzed. The analytical method was employed to evaluate statistical indicators, adopted decisions, and the practical outcomes of implemented strategies and plans.

Within the scope of the research, the following analytical tools were used:

SWOT analysis – applied to assess the ecotourism potential of the Zomin tourism zone;

Trend analysis – used to examine the growth dynamics of domestic and international tourism indicators during the period 2017–2023;

Comparative analysis – conducted to compare tourism performance indicators before the pandemic in 2019 and after the pandemic in 2023;

Regulatory and legal document analysis – used to study the legal framework, strategic plans, and the implementation of decisions in the tourism sector.

## ANALYSIS AND RESULTS

Innovative initiatives have been introduced to enhance the tourism potential of Uzbekistan, particularly by granting the status of “Tourism Mahalla,” “Tourism Village,” or “Tourism Hamlet” to communities where families establish guest houses and offer at least five types of services for tourists. Additionally, a proposal to institute a badge of honor titled “For Contribution to the Development of Tourism” for representatives of public organizations and compatriots abroad has been supported. This initiative not only motivates local citizens but also encourages the Uzbek diaspora to play an active role in promoting Uzbekistan’s rich tourism opportunities globally.

Uzbekistan, with its rich cultural heritage, historical monuments, and stunning nature, is among the countries placing strong emphasis on tourism development. The “Uzbekistan–2030” Strategy<sup>1</sup> outlines goals to improve conditions for both domestic and international tourism and significantly increase tourist numbers.

By 2023, Uzbekistan had reached 98% of its pre-pandemic level in foreign tourist arrivals. In 2019, 6.748 million foreign tourists visited the country, while in 2023 this number reached 6.626 million, demonstrating the rapid recovery of the tourism sector.

To attract more foreign tourists, measures such as simplifying visa procedures, developing new routes, investing in tourism-related projects, and organizing major events have been actively pursued. For instance, in 2023, a total of 508 projects worth 9.5 trillion UZS were implemented, resulting in the creation of 9,492 new jobs. The number of accommodation facilities reached 5,526, including 183 new hotels and 232 hostels. Additionally, 452 new family guest houses were opened, raising the total to 3,458. The number of tourism service providers and travel agencies increased to 2,649 following the launch of 810 new businesses.

From 2017 to 2023, the number of foreign tourists visiting Uzbekistan grew steadily—from 2.7 million in 2017 to 6.6 million in 2023—an increase of 2.5 times compared to 2017 and 1.3 times compared to 2022. Notably, in 2023, tourist arrivals from Japan increased fivefold, while those from India and Italy rose 3.5 times, and arrivals from the USA doubled.

Of the foreign tourists who visited Uzbekistan in 2023, 80.7% were from neighboring countries, 11.5% from other CIS countries, and 7.8% from non-CIS nations. The average length of stay increased to 4–5 days, compared to 3 days in 2022, reflecting improved tourist conditions across the country.

Domestic tourism has also seen significant growth. Under the program “Travel Around Uzbekistan,” 15 million citizens participated in travel, resulting in 21 million regional visits. Social support initiatives allowed 1,100 persons with disabilities and 570,000 youth to participate in tourism activities.

In 2023, the export value of tourism services reached 2.143 billion USD—1.3 times higher than in 2022. Furthermore, around 70,000 new jobs were created in

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<sup>1</sup> Decree of the President of the Republic of Uzbekistan, of 11.09.2023 r. № DP-158. On the Strategy "Uzbekistan — 2030"

tourism and related sectors, confirming comprehensive efforts to improve tourist experiences nationwide.

The development of tourism has contributed to Uzbekistan's improved positions in international rankings. For instance, in the “Global Muslim Travel Index” (GMTI-2023), Uzbekistan ranked 13th among 140 countries. At the “Halal in Travel Awards 2023”, the city of Khiva won the award for “Islamic Heritage Tourism Destination of the Year.” Additionally, at the 25th session of the UNWTO General Assembly held in Samarkand in 2023, the village of Sentob in Navoi region won the “Best Tourism Village 2023” award.

Moreover, Lonely Planet, an international publishing company, named Uzbekistan the “Best Travel Destination” for 2024, awarding it a special certificate. The inclusion of Uzbekistan in the 2024 list of the best countries to travel to by World of Statistics is expected to further boost foreign tourist inflow and tourism exports. All these achievements contribute to increasing the country's global recognition.

Overall, the current state and development trends of Uzbekistan’s tourism sector demonstrate positive outcomes. The measures being implemented and future prospects outlined in the “Uzbekistan–2030” strategy reaffirm the strategic importance of the tourism industry. These efforts aim to raise income levels, create new jobs, and improve public well-being. Tourism is being developed as a strategic sector capable of diversifying the national economy, accelerating regional development, increasing employment and income levels, and enhancing the country's investment appeal. The liberalization of the visa regime, simplification of foreign citizen registration, and the provision of incentives and preferences to develop tourism have enabled more effective promotion of the national tourism potential both domestically and internationally. However, analytical studies indicate that certain issues remain, such as the incomplete regulatory and legal framework of the tourism sector, lack of specific visa regimes based on traveler category, duration, and purpose—practices widely used in other countries. Furthermore, the shortage of accommodation and infrastructure during peak seasons, poor coordination in transport systems, low levels of tourist information dissemination, and ineffective marketing campaigns for promoting cultural heritage and pilgrimage sites negatively impact the dynamic development of tourism in Uzbekistan.

In order to create favorable conditions for the development of tourism, especially in the private sector, to increase the competitiveness and quality of services provided, to actively and comprehensively promote national tourism products in the global market, and to implement the proposals voiced in the Address of the President of the Republic of Uzbekistan to the Oliy Majlis on December 28, 2018, as well as in accordance with the tasks set out in the Action Strategy on five priority directions of the development of the Republic of Uzbekistan in 2017–2021, the following has been adopted:

a) The Concept for the Development of Tourism in the Republic of Uzbekistan for 2019–2025 (hereinafter — the Concept), in accordance with Appendix 1, includes:

- Improvement of the legal and regulatory framework in the field of tourism activities, and the implementation of international norms and standards aimed at creating favorable conditions for tourism development.
- Development of tourism infrastructure and the creation of a favorable tourism environment.
- Development of transport logistics, expansion of domestic and international routes, and improvement of the quality of transport services.
- Diversification of tourism products and services aimed at various segments of the tourism market.
- Promotion of domestic tourism by encouraging the activity of tourism entities to meet internal demand.
- Promotion of the tourism product of the Republic of Uzbekistan in international and domestic tourism markets, and strengthening the image of the country as a safe and comfortable destination for travel and recreation.
- Improvement of the system of training, retraining, and professional development of personnel for the tourism sector.

It is determined that the Concept shall be implemented gradually during the relevant period through the annual approval of specific measures and action plans;

b) The Action Plan for the implementation of the Concept for the Development of Tourism in the Republic of Uzbekistan for 2019, as outlined in Appendix 2, has been approved.

The State Committee for Tourism Development of the Republic of Uzbekistan shall analyze the results of the implementation of the annual Action Plan and submit the draft plan for the following year to the Cabinet of Ministers for approval by December 1 of each year.

One of the main factors attracting tourists to Uzbekistan is its captivating nature and diversity. The country's climate and weather are favorable for leisure and the development of ecotourism year-round. For example, the Jizzakh region, with its advantageous geographical location, diverse natural conditions, and developed industry, has high potential for ecotourism and strong demand for eco-tours.

Among the notable territories, the Zomin ecotourism area stands out for its ecotourism potential compared to other parts of the region. Most importantly, the area offers all the necessary opportunities to develop various directions of ecotourism. In this regard, government initiatives can be illustrated by the Cabinet of Ministers' Resolution No. 254 dated April 28, 2021, "On the organization of activities of the Zomin tourist-recreational zone."

This resolution was developed within the framework of implementing the Presidential Decree PF-6201 dated April 6, 2021, "On the establishment of the Zomin tourist-recreational zone and an international all-season resort." The resolution includes:

- Description of the borders of the "Zomin" tourist-recreational zone.
- The international all-season resort "Suffa Plateau 2400" and the "O'riklisoy" tourism complex.

- The Concept for the Development of the “Zomin” tourist-recreational zone.
- Measures for the implementation of this concept and the comprehensive development of the tourism sector in the area.

A program for the development of road-transport, engineering-communication, and industrial infrastructure in the zone and its surrounding area has been approved. Key tasks and directions of activity were defined, including:

- Implementation of projects for the creation of special functional and seasonal recreational areas within the tourism zone.
- Development of unique tourism routes considering the ecological characteristics of the territory.
- Development of new transport infrastructure.
- Creation of additional safety measures for tourists.
- Provision of benefits to entrepreneurs and investors implementing projects in the tourism zone.
- Introduction of modern energy-saving systems and technologies using alternative and renewable energy sources.
- Preservation of rare natural sites and complexes, as well as the genetic fund of plants and animals.

Furthermore, a state-owned enterprise “Zomin Tourist-Recreational Zone Directorate” was established, and its charter was approved. These measures are expected to increase the flow of both international and domestic tourists. In the continuation of this study, a SWOT analysis of the Zomin region's ecotourism potential will be conducted.

**Table 1**

**The SWOT analysis of the Zomin tourism zone<sup>1</sup>**

<b>Strengths</b>	<b>Weaknesses</b>
-the specific nature of nature -the programs that the government has developed for the development of the territory - the convenience of the territory for domestic tourism -the abundance of demand for this area	-lack of advertising at the international level -lack of infrastructure - lack of personnel -low tourism literacy of the population
<b>Opportunities</b>	<b>Threats</b>
-the absence of an area competitor -the fact that in the future Asian and International Ecotourism will be able to compete with the territories -the presence of a reserve on the territory -the concept of developing a Zomin tourist-recreational zone	-the introduction of the human factor into the wildlife of the area -the absence of a manual on the attitude towards nature to tourists visiting the area (in the form of a brochure )

<sup>1</sup> Author's work

Our analysis shows that the number of activities and opportunities for the development of the Zomin tourism and recreational zone has a significant impact on the region's economy. When analyzing the region's strengths, its unique natural features, government programs for regional development, and the high demand for domestic tourism serve as examples. For the region's economic development, blindly entering ecotourism could lead to a crisis. Therefore, failure to take timely action could lead to negative consequences. Preserving ecotourism is our responsibility as researchers. Based on the above analysis, it is recommended to develop a system for monitoring the relationship between tourists and nature, especially considering the potential harm of human interference in the area's wildlife.

Official statistical data confirms that in the next five years, the tourism sector is increasingly becoming one of the leading sectors in the country's economy, with the number of tourists expected to continue growing. According to estimates for 2023, around 7 million tourists visited the country for various purposes. Based on projections for 2024, the number of tourists is expected to reach 10 million.

The "Uzbekistan-2030" strategy sets out several goals and objectives for the development of the tourism sector. By 2030, the number of foreign tourists is projected to reach 15 million, the number of domestic tourists to 25 million, and the number of pilgrimage tourists to 3 million. Additionally, through attracting private investments, the number of tourism-related facilities is expected to increase at least twofold, with the number of tourism villages reaching 175. The export of tourism services is expected to reach 5 billion dollars, and medical and educational tourism exports to reach 1.5 billion dollars annually (Decree, 2023). Moreover, under the "2022-2026 New Uzbekistan Development Strategy," the aim is to increase the number of domestic tourists to over 12 million and foreign tourists to 9 million, with several specific measures to achieve this:

- Implementing seamless tourism infrastructure in key tourism cities across the country. By 2026, the number of people employed in the tourism sector is expected to double, reaching 520,000.

- Developing infrastructure for tourism and cultural heritage sites and adopting a national program for the effective use of over 8,000 cultural heritage sites.

- Transforming Samarkand into a "Tourism Gateway" to increase tourism services by at least 10 times in the next five years, ensuring the employment of 40,000 people in the tourism sector.

- Implementing separate programs to develop tourism in Khorezm and Tashkent regions, creating new job opportunities.

Certainly, to ensure the successful implementation of these tasks, several scholars, researchers, and tourism exports are conducting scientific studies.

In many sources, it is claimed that the roots of the tourism industry's development began in Western countries. However, according to Tohliyev (2021), one of the founders of tourism studies in Uzbekistan, the history of tourism's development dates back to Central Asian countries, where tourism served to strengthen the bonds of

friendship among peoples and facilitate trade, cultural, and diplomatic relations. The Central Asian region played an essential role in this process due to its position at the crossroads of trade routes and the convergence of cultures and civilizations.

In recent years, the number of foreign tourists visiting Uzbekistan has recovered from the pandemic. According to data in Table 1, in 2021, 1.7 million foreign tourists were expected to visit, but the actual number was 1.88 million, achieving 110.7% of the target. In 2022, 2.72 million were planned, but 5.23 million tourists actually visited, reaching 192.4% of the target. In 2023, 6.63 million foreign tourists visited Uzbekistan, which is 1.3 times more than in 2022. By the end of the year, it is expected that 10 million foreign tourists will visit Uzbekistan.

Uzbekistan has given special attention to the tourism sector, and positive growth trends are being implemented. In this context, pilgrimage tourism, cultural tourism, medical tourism, gastronomic tourism, youth tourism, ecotourism, ethnic tourism, sports tourism, and other forms of tourism are actively being developed. In the development of cultural and pilgrimage tourism, cities like Samarkand, Bukhara, Khiva, and Shahrizabz, with their rich historical monuments, architectural, religious, and cultural landmarks, play a crucial role in educating tourists with cultural and educational information. Regarding the implementation of the 2019-2025 National Tourism Development Concept, Uzbekistan's vast tourism and recreational potential includes 7,400 cultural heritage sites, with 209 of them located in UNESCO World Heritage cities such as "Ichan Kala" in Khiva, "Historical Center of Bukhara," "Historical Center of Shahrizabz," and "Samarkand City."

Between 2010 and 2017, the volume of tourism services exports doubled, reaching 546.9 million USD in 2017, and 1.04 billion USD in 2018. The number of foreign visitors increased by an average of 8% annually until 2016, with over 2.69 million visitors in 2017. By the end of 2018, 5.3 million foreign tourists had visited the country.

In recent years, large investment projects have been implemented to develop the tourism infrastructure, including the opening of "Hyatt Regency Tashkent" and "Lotte City Hotel Tashkent Palace" hotels, as well as cultural and entertainment parks in Andijan, Urganch, and Tashkent, and the launch of the "Angren-Pop" railway.

In the future, the state's tourism policy aims to lead the comprehensive and rapid development of regions and their infrastructures, creating jobs, ensuring regional diversification and growth, improving the income, living standards, and quality of life of the population, and enhancing the country's investment attractiveness and image.

In 2018, important factors in increasing the number of foreign tourists included simplifying the visa regime, tourism regulations, and business activities. Additionally, new measures were taken to promote tourism infrastructure and the country's tourism potential. These included:

- Introducing a visa-free regime for 9 more countries, increasing the number of countries offering simplified entry visas from 12 to 50.
- Launching an electronic visa system and allowing citizens of 101 countries to enter Uzbekistan without a visa.

- Simplifying the registration system for foreign citizens and shifting to a fully electronic system with the “E-MEHMON” platform.
- Eliminating the certification process for guesthouses.
- Introducing a new mechanism for certifying tourist-class vehicles, which led to an increase in the fleet of such vehicles to 128 (47 buses and 81 minibuses) in 2018.

## CONCLUSIONS AND RECOMMENDATIONS

It is proposed to establish a ‘Medal for Contribution to the Development of Tourism’ to honor representatives of public organizations and compatriots abroad who have significantly contributed to the development and popularization of the tourism sector is supported. This initiative will not only help raise awareness among our citizens but also among our compatriots living abroad about Uzbekistan's vast tourism potential. In short, considering tourism as a strategic sector of the economy, if we utilize existing opportunities to develop tourism through comprehensive measures for regional and national economic growth, and if we implement these actions in accordance with the programs and concepts within the set deadlines and quality standards, we will undoubtedly achieve the intended goals.

To conclude, the effective use of tourist resources in our country, the increase in the variety of services offered, and their adaptation to modern standards are being systematically implemented. All these efforts aim to increase the number of tourists visiting our country and to make Uzbekistan a popular tourist destination in the future.

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