



Feature Article
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Uzbekistan Tourism: The Quality Imperative

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This article examines how Uzbekistan can strengthen its economic security by leveraging its extraordinary cultural heritage and strategic positioning to transition from a volume-driven tourism model towards a value-driven approach. Targeted policy analysis and strategic planning for sustainable tourism development can accelerate this transformation. Global tourism experienced robust growth in 2025, with international tourist arrivals reaching 1.52 billion worldwide - a 4% increase over 2024 and a new post-pandemic record. International tourism receipts totaled an estimated \$1.9 trillion, representing 5% growth year-on-year, while total export revenues from tourism (including passenger transport) reached approximately \$2.2 trillion.¹ Within this expanding global market, destinations are increasingly competing not merely for visitor numbers, but for higher-value tourism segments. The most successful destinations are those that have strategically positioned themselves to attract tourists who stay longer, spend more, and engage more deeply with local cultures and communities.

Uzbekistan's tourism performance in 2025 was remarkable by any measure. The country welcomed 11.7 million international visitors, substantially exceeding the government's ambitious target of 10 million and representing a 46.8% year-on-year increase. This



Registan square with three madrasahs: Ulugh Beg, Tilya-Kori and Sher-Dor in Samarkand. (Shutterstock)

achievement reflects the country's strategic planning, including the introduction of visa-free access for citizens of nearly 100 countries and the prioritization of tourism within the 'Uzbekistan-2030' national development strategy and SME Development Strategy 2025-2030.²

¹ UN Tourism, "World Tourism Barometer. Retrieved from <https://www.unwto.org/un-tourism-world-tourism-barometer-data>," 2025.

² "UNWTO: Uzbekistan ranks among world's fastest-growing tourism destinations in 2025," Euronews, December 19, 2025. (<https://www.euronews.com/travel/2025/12/19/unwto-uzbekistan-ranks-among-worlds-fastest-growing-tourism-destinations-in-2025>)

Tourism revenues reached approximately \$4.7 billion, making tourism one of the country's most significant economic sectors and a critical source of foreign exchange. As Umid Shodiyev, head of Uzbekistan's Tourism Committee, notes, tourism has become "a core component of Uzbekistan's national economic strategy."³

The visitor profile reveals both strengths and limitations in the current model. Central Asian neighbors dominated arrivals: Kyrgyzstan contributed 3.3 million visitors, while Tajikistan and Kazakhstan each sent 2.7 million tourists. Russia added nearly 1 million visitors. Afghanistan and Turkmenistan contributed 476,700 and 370,000 visitors respectively.⁴

Long-haul markets remain underdeveloped relative to their potential. China led non-CIS countries with 278,900 visitors, followed by Turkey (174,900), India (80,800), and South Korea (46,300). While these numbers represent growth, they suggest significant untapped potential in markets typically associated with higher per-visitor spending and longer stays.⁵

The Georgia Model: Shifting Towards Quality Over Quantity

Georgia presents a compelling alternative development path—one that prioritizes tourism quality and value creation over visitor volume. With approximately half of Uzbekistan's tourist arrivals, at 5.1 million, Georgia remarkably generated about the same tourism revenues, \$4.4 billion. This translates to an average revenue per tourist that is 2.1 times higher.

Georgia's success stems from its strategic emphasis on high-value tourism segments and its sophisticated approach to cultural heritage marketing. Specifically, they have leveraged several distinct assets:

Most notably, Georgia has transformed archaeological and historical narratives into compelling tourism attractions. The country's 8,000-year wine-making tradition - the world's oldest - has become the cornerstone of a thriving wine tourism industry. Archaeological evidence of early human habitation, connections to Greek mythology (the Golden Fleece and the Argonauts' journey to Colchis), and Georgia's unique position at the crossroads of civilizations have all been woven into a cohesive national brand.

This heritage-based branding strategy has enabled Georgia to command premium pricing while attracting culturally sophisticated

³ UN Tourism.

⁴ "Uzbekistan records one of its biggest tourism surges," *The Caspian Post*, January 19, 2026.

⁵ Ibid

travelers who stay longer and engage more deeply with local offerings. Beyond wine tourism, a unique blend of natural landscapes and cultural heritage sites has positioned Georgia as an attractive destination for affluent international travelers. Activities such as traditional and helicopter skiing, trekking in the Caucasus, bird-watching in western Georgia, hiking to waterfalls and carstic caves, exploring dinosaur fossil sites, and staying in ecotopes, have emerged as significant economic drivers. Together, these offerings draw a global clientele willing to pay premium prices for immersive, authentic experiences.

Georgia's economic twin pillars of both tourism, and wine and spirits, have generated impressive results, equalling approximately \$5 billion in hard currency revenues while supporting tens of thousands of jobs across multiple sectors. In comparison, Georgia's total goods exports in 2024 (excluding re-exports) totaled just \$3.01 billion, with total exports including re-exports reaching \$6.5 billion.⁶ Tourism revenues thus exceed the country's traditional merchandise export earnings.

Equally significant, Georgia's tourism model drove broader economic diversification, creating linkages with agriculture, food production, handicrafts, hospitality services, and cultural industries. This integrated approach generates multiplier effects throughout the economy while building sustainable livelihoods in both urban and rural communities.

This has a particular positive impact in many otherwise economically distressed remote rural areas, where tourism became a key driver for household incomes.

Strategic Implications for Uzbekistan

The Georgia comparison illuminates both the challenge and the opportunity facing Uzbekistan. The country's extraordinary Silk Road heritage, world-renowned architectural monuments in Samarkand, Bukhara, and Khiva, and rich cultural traditions provide assets comparable to those Georgia has successfully monetized, but in much larger in scale.

The revenue gap suggests substantial unrealized economic potential. If Uzbekistan could achieve Georgia's per-tourist revenue performance—moving from \$375 to approximately \$700 per visitor while maintaining current arrival levels—tourism revenues would increase from \$4.4 billion to approximately \$8.4 billion annually, a gain of \$4 billion in foreign exchange earnings.

Understanding the evolution of cultural tourism provides important context for Uzbekistan's strategic options. By the 1990s, cultural tourism had become a major segment of global tourism, with the UN World Tourism

⁶ Geostat (National Statistics Office of Georgia), "Foreign trade statistics," 2024. (<https://www.geostat.ge>)

Organization estimating that 40% of international tourists were cultural tourists.⁷ This surge created intense competition among destinations seeking to leverage cultural heritage for economic development.

During this period, many destinations made the mistake of emphasizing infrastructure expansion - opening new museums and monuments - without equivalent attention to experience quality, narrative development, and visitor engagement. The growth rate of cultural attractions in Europe during the 1990s outstripped demand growth, producing an increasingly competitive and sometimes commodified marketplace.⁸

The key takeaway: sustainable competitive advantage in cultural tourism comes not from simply making heritage sites accessible, but from creating distinctive, authentic, and emotionally resonant experiences that justify premium pricing and generate strong word-of-mouth marketing. Georgia has mastered this approach; Uzbekistan has the assets to do likewise.

The Path Forward: From Volume to Value

Transitioning from volume-driven to value-oriented tourism requires a comprehensive strategy addressing product development,

market positioning, infrastructure enhancement, and stakeholder capacity building, especially among SMEs, thus aligned with the SME Development Strategy. SMEs are top job generators in the country where every year hundreds of thousands of young people enter the job market.

Uzbekistan must move beyond tourism that simply showcases monuments to creating compelling heritage narratives that resonate emotionally with international travelers. The country's role in Silk Road history, its contributions to early medieval enlightenment and all fields of science, Islamic scholarship and architecture, its living cultural traditions - offer rich material for distinctive positioning. The key is transforming historical facts into experiential narratives that justify premium pricing for long-haul travelers.

While maintaining strong regional connectivity, Uzbekistan should systematically target long-haul markets characterized by longer stays with superior spending potential. Target markets could include Western Europe, North America, East Asia (particularly Japan, South Korea and higher-income segments in China), and affluent travelers from the Middle East. Each market requires tailored positioning, distribution partnerships, and cultural adaptation of tourism products.

⁷ M Bywater, "The market for cultural tourism in Europe," *Travel & Tourism Analyst*, no. 6, 1993, pp. 30-46.

⁸ Greg Richards, "The Development of Cultural Tourism in Europe," in Richards, Ed., *Cultural attractions*

and *European tourism* Wallingford: CABI Publishing, 2001, pp. 3-29.

In addition, the country should develop tourism experiences that extend beyond traditional cultural site visits. Opportunities include culinary tourism (Central Asian cuisine and traditional dining experiences), adventure tourism (mountain trekking, desert exploration), artisan tourism (traditional crafts, textiles, ceramics), sustainable rural tourism, and special interest offerings (photography tours, archaeological tourism, Islamic heritage programs). Each category attracts distinct visitor segments with varying but generally higher spending patterns.

Premium-priced tourism requires premium service delivery. This requires strategic investments in boutique accommodation, high-quality interpretation and guiding, transportation comfort and reliability, culinary excellence, and digital connectivity. Equally important is capacity building for tourism service providers, ensuring they can deliver experiences meeting international quality expectations. SMEs, which account for 74.5% of total employment in Uzbekistan,⁹ can play a special role in driving a specially designed strategy of legal and regulatory reform, investment promotion, tax incentives, green growth, digital transformation, and market access.

High-value international travelers increasingly prioritize sustainability and authentic community engagement. Uzbekistan could

integrate sustainability principles throughout tourism development, including heritage site conservation, environmental protection, equitable economic distribution to local communities, and cultural authenticity. These practices not only align with emerging traveler values but also protect the assets upon which long-term tourism success depends.

Conclusions

Uzbekistan stands at a critical juncture in its tourism development journey. The country has successfully positioned itself as an emerging major destination, achieving impressive growth in visitor arrivals. The next chapter requires a deliberate pivot from volume maximization to value creation—from counting tourists to making tourism count for sustainable economic development.

Georgia's success demonstrates both the feasibility and the rewards of this strategic shift. With cultural and natural heritage assets, Uzbekistan possesses the necessary building blocks for a similar transformation. What is required is the strategic vision, technical expertise, and sustained implementation commitment to unlock this potential.

The opportunity is substantial: generating billions in additional tourism revenues while building a more resilient, sustainable, and inclusive tourism economy. Achieving this vision requires moving beyond conventional

⁹ Asian Development Bank. *Asia SME Monitor 2025*

approaches to embrace international best practices in sustainable tourism development, strategic market positioning, and quality-focused product design.

For governments, investors, and development organizations seeking to capitalize on Uzbekistan's tourism potential, the strategic choice is clear: the path from quantity to quality is not merely desirable - it is essential

for long-term competitive success and sustainable economic impact.

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