



Article

Theoretical and Practical Aspects of Tourism Industry Development: Uzbekistan's Experience and International Approaches

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Abstract: Tourism development is often assessed through arrival growth, although increased mobility does not necessarily produce longer stays, stronger local businesses or better conservation. This article examines that distinction in Uzbekistan through a descriptive analysis of official visitor statistics and a structured comparison of international policy instruments. The statistical component uses the National Statistics Committee's January–September 2025 purpose-of-trip data; the comparative component examines Portugal's strategic planning, Slovenia's sustainability scheme and Malaysia's Muslim-friendly hospitality recognition. Calculations show that visiting relatives accounted for 67.93% of recorded inbound trips, compared with 16.06% for recreation and leisure. These categories describe travel purposes rather than expenditure or accommodation demand. The analysis therefore proposes segment-specific development measures, linking visitor activity to local procurement, service quality, heritage protection and destination governance. Particular attention is given to ziyarah tourism, where religious significance and dependable hospitality require distinct but coordinated management. The article contributes an applied framework connecting tourism measurement to policy implementation. Its recommendations are analytical propositions rather than estimated causal effects and require destination-level testing. Uzbekistan's development challenge is to improve the value and distribution of tourism benefits while protecting the cultural assets and living communities on which those benefits depend.

Keywords: tourism development; Uzbekistan; destination competitiveness; sustainable tourism; visitor segmentation; destination governance; ziyarah tourism; local economic development

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1. Introduction

A visitor can enter Uzbekistan, spend several days with relatives and leave without booking a hotel or purchasing an organised excursion. Another may travel through Samarkand and Bukhara, paying for accommodation, guiding, transport and cultural experiences. Both journeys may fall within tourism statistics, but their implications for investment are different. Treating them as equivalent units of commercial demand makes it difficult to decide where additional accommodation, transport capacity or marketing expenditure is justified [1].

The issue is not whether visits to relatives are economically relevant. They can support transport operators, shops, restaurants and household spending. The issue is that a count of journeys cannot establish their expenditure, regional distribution or contribution to employment. Nor can arrival growth reveal whether residents receive a fair share of the benefits or whether historic neighbourhoods retain the qualities that attract visitors.

Tourism development consequently requires a wider analytical frame than the expansion of border flows [2].

Uzbekistan provides a useful setting for this discussion. Its recognised cultural assets include Samarkand, Bukhara and Itchan Kala, alongside heritage extending beyond the familiar historic-city itinerary (UNESCO World Heritage Centre, n.d.). The National Statistics Committee reported a preliminary 11.7 million foreign citizens visiting for tourism purposes in 2025 (National Statistics Committee, 2026). This indicates the scale of recorded inbound activity; it is not used here as a measure of unique leisure visitors or of tourism's contribution to gross domestic product.

The theoretical question is how cultural resources become durable economic opportunities. An attraction may be internationally known while surrounding enterprises struggle to sell services. A destination may add hotel rooms while access, interpretation or public facilities remain inadequate. Tourism is therefore examined as a relationship among demand, service production and collective management. The article asks three questions: what does the composition of Uzbekistan's inbound travel imply for product development; which international policy instruments are adaptable to its circumstances; and how should destination performance be assessed beyond arrivals?

The contribution is an applied synthesis rather than a new estimate of tourism's macroeconomic impact. Official statistics are used to establish the structure of demand, while selected international cases help identify practical instruments. The resulting framework links visitor segmentation to local enterprise participation, heritage management and measurable service outcomes. Ziyarah tourism receives particular attention because developing a religious itinerary involves both hospitality provision and respect for the continuing religious use of places. [3]

Destination competitiveness is therefore understood as the capacity to convert cultural resources into a coherent visitor experience through transport, accommodation, guiding, information and public services. This interpretation follows Dwyer and Kim's (2003) emphasis on multiple determinants of competitiveness and Butler's (1980) view that management priorities change as destinations develop. It also implies that mature heritage districts and emerging rural locations should not be treated as if they face the same constraints.

Sustainable tourism further requires economic performance to be assessed together with social and environmental outcomes (UNEP & World Tourism Organization, 2005). Visitor spending may support local employment and suppliers, yet gross sales do not show how much value remains in the destination or what costs fall on residents and cultural assets. Accordingly, this study considers service quality, local supplier participation, employment continuity, resident experience and heritage management alongside visitor volume (OECD, 2026).

2. Materials and Methods

The study combines secondary-data analysis with a structured qualitative comparison. It does not report interviews, a visitor survey or an econometric model. The empirical unit is the recorded inbound trip in the National Statistics Committee's January–September 2025 tourism-flow table. This period is used because its purpose categories permit a consistent within-period decomposition. The full-year 2025 headline is contextual and is not joined to the nine-month observations to calculate a growth rate [4].

For each purpose category, its share is calculated as category trips divided by total trips, multiplied by 100. The published unit is thousand trips. Calculations retain the published precision and round percentages to two decimal places. Counts are not interpreted as unique individuals. Following international statistical guidance, overnight tourists and same-day visitors must also be distinguished where the underlying information permits; this table is not used to infer that distinction (United Nations and World Tourism Organization, 2010) [5].

The comparative cases were selected purposively for different policy functions: Portugal for integrated strategic planning, Slovenia for destination and provider sustainability assessment, and Malaysia for Muslim-friendly service recognition. They are

not a representative sample of successful tourism economies. Each case is examined through the same questions: what problem the instrument addresses, how it operates, what administrative capacity it requires, and what would need adaptation in Uzbekistan. Official programme descriptions establish instrument design; they do not establish causal effectiveness.

The documentary base also includes UNESCO conservation material, OECD policy analysis and a World Bank municipal-development announcement. These sources provide evidence of institutional priorities and specific management issues. Policy commitments, approved financing and proposed actions are distinguished from completed outputs. Online materials were consulted in September 2026; the quantitative analysis remains explicitly confined to its 2025 observation period.

The analysis proceeds in three stages. First, it identifies the implications and limits of the statistical composition. Second, it examines how tourism expenditure could translate into local benefits and where governance is required. Third, it assesses the transferability of international instruments and proposes a monitoring framework. Recommendations are presented as propositions to test, rather than as interventions with already demonstrated effects in Uzbekistan [6].

3. Results

3.1 The demand structure changes the development question

Table 1 presents the official purpose categories and the author's percentage calculations. Visiting relatives represents 67.93% of the total, while recreation and leisure accounts for 16.06%. Business trips constitute a further 11.13%. The principal empirical result is thus a mixed demand structure in which the leisure category is much smaller than the overall inbound total (National Statistics Committee, 2025).

Table 1. Inbound trips by purpose in January–September 2025

Purpose	Thousand trips	Share of total (%)
Visiting relatives	5,815.9	67.93
Recreation and leisure	1,375.1	16.06
Business trip	953.2	11.13
Commerce	322.7	3.77
Treatment	68.5	0.80
Study	26.5	0.31
Total	8,561.9	100.00

Source: National Statistics Committee (2025); shares calculated by the author from the published total of 8,561.9 thousand trips. The period is January–September 2025, not the full year. The categories sum to the published total; displayed percentages sum to 100.00%.

This composition supports segmentation rather than an attempt to replace one category with another. A visitor staying with relatives might purchase a day excursion, a museum visit or a family restaurant experience without requiring hotel accommodation. Product development for this segment could therefore begin with accessible short activities and clear local information. Such an approach would need testing through actual purchases and satisfaction, rather than assuming that the segment spends little or has limited tourism interest [7].

For leisure travellers, the relevant questions are different: how many nights they spend, how many locations they visit and which services they purchase. An operator

developing a multi-day itinerary needs evidence about these behaviours. Business travel may support demand near transport connections and meeting facilities, but the published purpose label alone does not establish the scale of meetings or exhibition tourism. Across all categories, purpose should be combined with stay, expenditure and itinerary information before major investment decisions are made [8].

The statistics also show a regional orientation. Trips by citizens of the Kyrgyz Republic, Kazakhstan and Tajikistan together represent approximately 74.20% of the same period's total, calculated from the published country counts. Citizenship is not a direct measure of residence, income or motive. Nevertheless, the concentration suggests that regional travel conditions deserve attention alongside long-distance promotion. It would be premature to infer either a weak international brand or a low-value market from this composition alone.

Two planning errors follow from neglecting these distinctions. The first is to forecast hotel demand directly from total inbound trips. The second is to treat every additional journey as an equal contribution to tourism receipts. A more defensible approach is to estimate accommodation nights and expenditure separately for observed visitor segments, preserving differences between paid and unpaid accommodation. This would give investors a clearer demand basis and prevent national promotional indicators from being mistaken for project feasibility evidence [9].

3.2 From visitor activity to locally retained benefits

The economic transmission mechanism can be expressed as a sequence: a visit creates demand; businesses sell services; those businesses purchase inputs and employ workers; part of the resulting income remains in the destination. The size of each step is an empirical matter. Arrival growth establishes only the first element and cannot identify how strongly the remaining links function.

For overnight visitor segments, a useful accounting decomposition is expenditure = trips $\times$ average nights per trip $\times$ average expenditure per night. It is valid only when all three components refer to the same population and spending coverage. Same-day trips require a separate calculation, while package payments must be allocated carefully to avoid counting the same purchase more than once. The expression is an accounting aid, not a causal model of tourism growth.

The decomposition reveals several development options. A destination can attract additional visitors, encourage a longer stay through worthwhile activities, or improve the range and quality of services purchased during an existing visit. None is automatically preferable. A longer stay may place additional demand on water and waste services; a higher price may reflect inflation rather than an improved product. Expenditure should therefore be reported in a consistent price basis where comparisons over time are intended [10].

Local procurement offers another margin of improvement. Accommodation providers and tour operators could identify goods and services that capable local firms can supply reliably, then make purchasing requirements transparent. Small suppliers may need predictable order volumes, quality guidance or shorter payment periods more than a general entrepreneurship seminar. A proposed pilot could compare local purchasing before and after such support, while recording price, quality and delivery performance. Its outcome would be the measured change in procurement, not a presumed multiplier.

There is also a financing implication. Visitor demand can be seasonal while loan repayments and some operating expenses continue throughout the year. Before expanding capacity, an enterprise should test occupancy, operating costs and debt-service capacity under weaker months as well as peak demand. At destination level, public authorities should distinguish commercially viable accommodation investments from shared infrastructure that requires collective funding. This distinction helps prevent the expectation that every necessary service can recover its costs through visitor charges [11].

3.3 Heritage management is part of tourism production

Heritage protection is a practical economic issue because the authenticity and setting of a place contribute to what visitors come to experience. A construction project may improve access or add commercial floor space while changing the historic environment. The evaluation therefore needs to consider the asset being altered, not only the number of customers that the new facility might accommodate.

UNESCO's 2025 decision on Samarkand requested updated planning documents and continued heritage impact assessment for major projects, alongside further conservation and management work (UNESCO World Heritage Committee, 2025). This is a documented management concern, not evidence that all tourism investment is harmful. Its relevance is that development proposals in sensitive settings require coordination and assessment before implementation, rather than conservation being treated as a later adjustment [12].

The article proposes a practical screening sequence for destination projects. First, define the visitor or resident problem being addressed. Second, compare a new-build option with repair, reuse, scheduling or service improvements. Third, assess heritage, neighbourhood and infrastructure implications. Finally, specify the operating organisation, maintenance budget and monitoring responsibility. A project that increases capacity but has no credible operating arrangement should not be considered complete at construction handover.

Resident access also matters. Public spaces, streets and religious places can serve local daily life and visitors simultaneously. A tourism-oriented intervention should examine whether it changes access, costs or acceptable use for residents. Consultation is more useful when participants can influence design choices and receive an explanation of how their concerns were handled. Counting consultation meetings does not establish that local interests shaped the project.

3.4 International approaches and conditions for adaptation

Portugal's Tourism Strategy 2027 combines a long-term framework with shorter-term action and coordination among tourism stakeholders. Its published objectives include economic, social and environmental dimensions, including activity across the year (Turismo de Portugal, n.d.). The relevant lesson is the structure connecting strategy to implementation. The existence of those objectives is not evidence that every target has been achieved.

For Uzbekistan, the transferable element would be a limited set of agreed destination objectives tied to funded actions and named responsibilities. A region might prioritise overnight stays outside peak periods, while a heritage district might prioritise conservation and pedestrian access. National objectives would remain common enough for reporting, but local plans would respond to actual constraints. The risk is producing another strategy document without an operational budget or a mechanism for resolving conflicts between agencies.

Slovenia's Green Scheme combines a national sustainability brand with tools for destinations and service providers to assess and improve their practices (Slovenian Tourist Board, n.d.). Its relevance lies in connecting recognition to an assessment process. For an Uzbek pilot, a smaller initial set of verifiable requirements could cover metered resource use, waste arrangements, accessibility information and resident feedback. Auditing capacity and support for small enterprises would have to develop alongside the label [13].

A certification programme can fail if recognition becomes primarily promotional. The proposed adaptation should therefore publish assessment rules, renewal conditions and responsibility for checking claims. Participation costs also matter: an expensive process can exclude capable family businesses. A phased scheme with practical assistance could be tested before national expansion. These are design proposals; the present study does not estimate the costs or environmental savings of certification.

Malaysia's Islamic Tourism Centre operates Muslim-Friendly Tourism and Hospitality Assurance and Recognition, identifying businesses that meet specified hospitality guidelines (Islamic Tourism Centre, n.d.). This offers a model for making service claims understandable to travellers. It should not be treated as proof that a religiously significant destination automatically delivers dependable Muslim-friendly services, or that a general hospitality label replaces other applicable certification.

For Uzbekistan, adaptation would begin with clear descriptions of available facilities and verified service provision. Religious heritage, food assurance, prayer facilities, guide competence and visitor information are related but separate matters. The most useful transfer is the discipline of specifying and checking the service promise. A copied brand name or an unsupported claim of international leadership would add little to visitor confidence.

Table 2. International instruments and proposed adaptation

Case and instrument	Function	Possible Uzbek application	Condition for implementation
Portugal Tourism Strategy 2027	Connect strategy with coordinated action	Destination plans with funded actions and named owners	Coordination across agencies and budgets
Slovenia Green Scheme	Assess and improve sustainability practices	Pilot assessment of resource use and destination management	Affordable participation and credible verification
Malaysia MFAR	Recognise defined Muslim-friendly hospitality provision	Clear, verified service information for relevant travellers	Competent assessment and precise scope of claims

Source: Author's comparison of Turismo de Portugal (n.d.), Slovenian Tourist Board (n.d.) and Islamic Tourism Centre (n.d.). The final column identifies proposed implementation conditions, not measured outcomes of these programmes.

3.5 Ziyarah tourism and the integrity of the visitor experience

Uzbekistan's official tourism portal presents Bukhara's Seven Saints as a pilgrimage itinerary and includes religious sites within wider cultural routes (Uzbekistan Travel, n.d.). This establishes an existing product theme. It does not provide a separate statistical estimate of pilgrimage demand, and the purpose-of-trip table used in this study does not isolate ziyarah travel. Its market size should therefore not be inferred from all visits by citizens of predominantly Muslim countries.

For analytical purposes, ziyarah tourism is treated here as travel involving visits to religiously significant places. Muslim-friendly hospitality concerns the services available to travellers and may be relevant even where the principal purpose is business or leisure. Keeping the concepts separate makes planning more precise. A site may have religious importance but limited visitor services; a hotel may offer suitable facilities without being part of a pilgrimage route [14].

Product development should begin with the conditions under which the site continues to function as a religious place. Visitor scheduling, explanation of etiquette, appropriate interpretation and respectful photography guidance may be as important as an additional commercial facility. Those responsible for religious practice should

participate in planning. The objective should be to make visits intelligible and manageable while maintaining access for worshippers, rather than treating all site users as consumers of the same experience.

Interpretation is a further source of quality. Guides should distinguish documented history, religious teaching and local tradition instead of presenting every narrative as an established historical fact. Multilingual materials can explain these differences without dismissing their cultural significance. Training could be evaluated through observed guiding practice, accuracy checks and visitor feedback rather than attendance certificates alone.

The local economic opportunity extends beyond site admission. Small accommodation businesses, transport providers, food enterprises and craft producers could participate through transparent itinerary purchasing. However, longer itineraries should be developed around meaningful experiences and realistic travel times. Adding stops merely to raise the package price can weaken the visit and put pressure on sacred spaces. Pilot routes should record expenditure distribution, complaints, accessibility and site-management needs before being promoted at scale.

3.6 Infrastructure, workforce and digital services

Tourism depends on ordinary municipal services. The World Bank's December 2025 announcement of financing for Uzbekistan's Livable and Productive Cities Program includes utilities, public facilities, transport and tourism-related infrastructure, together with local planning capacity (World Bank, 2025). These are approved programme intentions, not completed tourism outcomes. They illustrate why destination development should be connected with urban services rather than managed solely as promotion.

A useful investment test is whether an improvement solves a recurring problem for both residents and visitors. Safe pedestrian routes, functioning toilets and dependable waste collection may have broader benefits than an isolated attraction. Project selection should compare expected use, maintenance requirements and accessibility. Where benefits are shared, the tourism budget should not be assumed to be the only possible funding source; coordination across responsible services is required [15].

Workforce development should also start from the service being delivered. A training programme for guides has different requirements from one for accommodation managers or public-site staff. Proposed assessment could include booking accuracy, complaint resolution, interpretation quality or resource monitoring. Employment outcomes should be examined through retention and working conditions as well as the number of people trained. Otherwise, training activity can expand without improving service continuity.

Digitalisation is best evaluated through completed visitor tasks. Can someone find accurate opening hours, understand access conditions, make a booking and receive a reliable confirmation? A new portal that duplicates outdated information may increase administrative work without improving the experience. The proposed priority is consistent core information and reliable links among existing providers, followed by more advanced applications where an identified need justifies them.

Small firms should be able to participate without surrendering unnecessary customer information. Common booking fields, clear cancellation terms and transparent payment arrangements may be more immediately useful than a comprehensive central database. Destination monitoring can often use aggregated business and visitor data. Any more detailed collection should have a defined purpose, access controls and an assessment of the burden placed on participating enterprises.

3.7 A monitoring framework tied to decisions

The proposed framework separates demand, business performance and destination conditions. This prevents a rise in one indicator from masking deterioration elsewhere. For example, additional overnight stays might coincide with resource pressures, while increased spending might be concentrated in a small number of firms. A destination

report should make such trade-offs visible rather than collapse them into a single unvalidated score.

The international move towards measuring tourism's economic, environmental and social dimensions provides a methodological basis for this approach. The United Nations Statistical Commission adopted the Statistical Framework for Measuring the Sustainability of Tourism in 2024 (United Nations Statistics Division, 2024). A local dashboard would not, by itself, constitute full implementation of that framework. It could provide a practical starting point if definitions and collection procedures were aligned with national statistical work.

Table 3. Proposed destination monitoring indicators

Dimension	Indicator	Data source	Decision supported
Demand	Nights and expenditure by visitor segment	Visitor survey; accommodation records	Product and capacity planning
Local enterprise	Local procurement share with an explicit definition	Business purchasing records	Supplier development
Employment	Retention and months of paid employment	Enterprise and worker data	Workforce support
Heritage	Condition issues and corrective actions completed	Site management records	Conservation priorities
Environment	Water and energy use per guest-night and in total	Metered business records	Efficiency and capacity management
Resident experience	Consistently sampled feedback on access and tourism effects	Resident survey	Project design and operating rules
Service reliability	Booking failures and complaints resolved	Provider service records	Training and service correction

Source: Author's proposed monitoring framework, informed by international tourism measurement principles. No baseline or target values are assigned because these require destination-level evidence and consultation.

Each indicator needs an owner, collection frequency and specified management use. Resource intensity, for example, should be examined alongside total resource use: efficiency can improve while total demand still rises. Resident feedback requires a consistent sampling approach, not only comments collected from people already involved in tourism. Local procurement must define what counts as a local supplier and should not be confused with local value added.

Implementation could begin with a small group of destinations and a limited reporting burden. The first phase would reconcile definitions and establish baselines. The second would test selected service or procurement interventions. A later phase would compare results and decide which practices deserve wider application. Expansion should

depend on the quality of evidence and the ability to maintain the programme, rather than on the number of participating locations alone [16].

4. Discussion

The analysis suggests that Uzbekistan's tourism development should be understood as a conversion problem: how recorded travel becomes useful demand for enterprises and acceptable outcomes for places. The purpose-of-trip composition gives this argument a concrete basis, but it does not establish expenditure differences between segments. The most defensible conclusion is therefore a need for segmentation and linked measurement, rather than a ranking of visitors by presumed economic value.

The international comparison identifies complementary instruments. Strategic planning can align organisations and budgets; sustainability assessment can make operating claims verifiable; service recognition can reduce uncertainty for travellers. Their combination is potentially useful, but only where responsibilities, skills and resources exist. OECD (2024) similarly identifies coordination and destination-level implementation as important tourism-policy concerns. Programme transfer should consequently begin with the administrative function required, rather than the visible label attached to it.

There is a tension between rapid expansion and the slower work of maintaining places. New capacity can be counted soon after opening, whereas better interpretation, conservation and supplier relationships may produce gradual effects. This difference can favour visible construction in performance reporting. The proposed framework addresses the imbalance by including operating and community outcomes, without assuming that construction is unnecessary or that all growth is undesirable.

The study has several limitations. It uses one nine-month statistical period and cannot estimate trends, seasonality or causal effects. Purpose labels do not capture all activities undertaken during a trip. Official programme descriptions may emphasise intended benefits, and the comparison includes no independent impact evaluation of the selected instruments. Domestic tourism, enterprise finances and resident experience are not measured directly. These limits prevent claims about an optimal visitor volume or a quantified return from the recommended policies.

Further research should combine visitor expenditure and stay information with accommodation records, enterprise purchasing data and resident surveys at selected destinations. A phased intervention could compare changes with similar locations not yet participating, while examining whether their prior trends are comparable. Such work would test whether improvements in service coordination or procurement produce additional local benefits, rather than merely documenting that tourism activity and investment increased together.

5. Conclusion

Uzbekistan's inbound statistics describe substantial and varied travel activity. Their development significance depends on what visitors do, where they stay and how their expenditure connects with local enterprises. The descriptive results support separate planning for different travel purposes and caution against using total trips as a direct proxy for hotel demand or economic value.

The comparison with Portugal, Slovenia and Malaysia identifies practical approaches to coordination, sustainability assessment and service assurance. For Uzbekistan, these should be adapted through manageable pilots with clear responsibilities and verifiable measures. Ziyarah tourism requires particular care in connecting dependable hospitality with the continuing religious role of sites.

The immediate priorities are to improve segment-level measurement, coordinate visitor services with municipal and heritage management, and strengthen the ability of local firms to participate in tourism supply. Progress should be judged through business viability, resident experience and the condition of cultural assets as well as arrivals. This approach gives expansion an explicit development purpose and provides a basis for testing whether policy delivers that purpose in practice.

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