



# An Overview of Tourism and Hospitality Industries in Uzbekistan: A SWOT Analysis Approach

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Central Asia: 30 years of Independence – Challenges and Opportunities  
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# AGENDA

- Aim of the presentation
- Pre, during and post global tourism
- Tourism in Uzbekistan
  - Stats, types
- SWOT Analysis
- Future of tourism



# Aim of the presentation

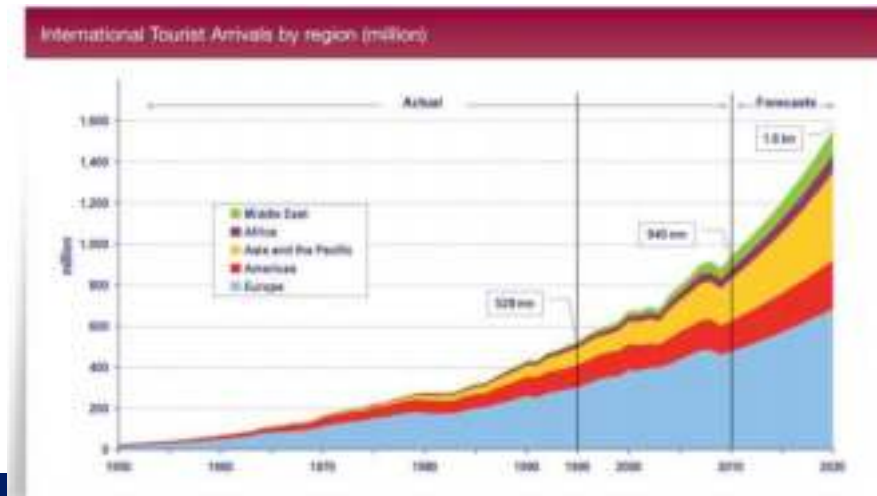
As part of a larger research agenda this paper aims to present an overview of the tourism and hospitality industries in Uzbekistan by using SWOT analysis approach.

- will be summative in nature
- will present an overview of the current situation
- will present some recommendations to the stakeholders at the various levels of government and/or industry



# Global Tourism

- Continuous up trend since last 10 years
- 1/9 jobs were service based
- export earnings generated by tourism have grown to 1.7 trillion \$ (UNWTO, 2020)
- Those were the days...



# Tourism – COVID19

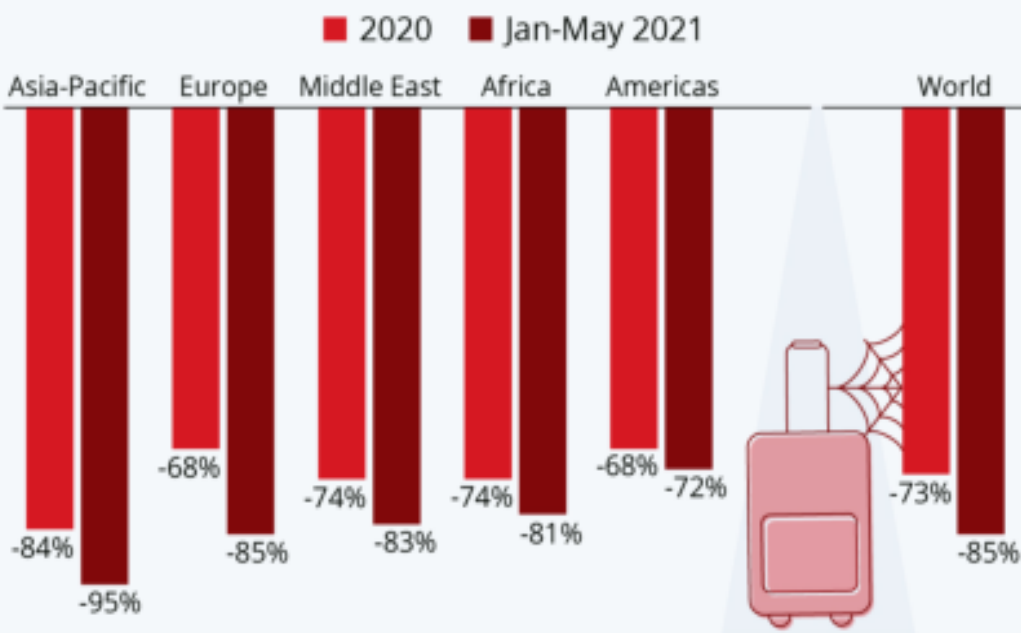
WORLD TRAVEL & TOURISM COUNCIL

## TRAVEL & TOURISM: ECONOMIC IMPACT 2021<sup>1</sup>



### International Travel Goes From Bad to Worse in Early 2021

Change in international tourist arrivals compared to 2019



Source: UNWTO



statista

#### GLOBAL DATA

**\$ Total GDP contribution:**

2019 **10.4%**  
USD 9,170 BN

2020 **5.5%**  
USD 4,671 BN

Total Travel & Tourism GDP change in 2020:

**-49.1%** = USD -4,498 BN

Global economy GDP change:

**-3.7%**

**👤 Total Travel & Tourism jobs:**

2019 **334MN**  
= 1 in 10 jobs

2020 **272MN**  
= 1 in 11 jobs

1 in 4 net new jobs were created by Travel & Tourism during 2014-2019



Change in jobs in 2020<sup>2</sup>

**-61.6MN**  
-18.5%

**\$ Leisure vs Business Spending:**



Leisure Spending:  
2019 = USD 4,692.4 BN  
2020 = USD 2,373.7 BN  
(-49.4% change)

Business Spending:  
2019 = USD 1,294.2 BN  
2020 = USD 504.3 BN  
(-61.0% change)

**\$ Domestic vs International Spending:**



Domestic Spending:  
2019 = USD 4,295.1 BN  
2020 = USD 2,360.3 BN  
(-45.0% change)

International Spending:  
2019 = USD 1,691.5 BN  
2020 = USD 517.6 BN  
(-69.4% change)

<sup>1</sup> This data includes the direct, indirect, and induced impact of Travel & Tourism. Source: WTTC and Oxford Economics. All values are in constant 2019 prices & exchange rates. As reported in March 2021.  
<sup>2</sup> Where countries or regions have implemented job support schemes and supported jobs are still recorded as employment by national statistical authorities, job losses include those supported jobs (where relevant).

# Uzbekistan

- Located in Central Asia (bordering the Aral Sea, between Kazakhstan and Turkmenistan) but landlocked
- Unknown but exotic and fabled destination
- Blending flavor of Adventure, Nature and History in Uzbekistan



# Types of Tourism in Uzbekistan

- Ecological Tourism
- Health Tourism
- Ethnic Tourism
- Food tourism
- Adventure Tourism
- Mice-Industry



# Types of Tourism in Uzbekistan





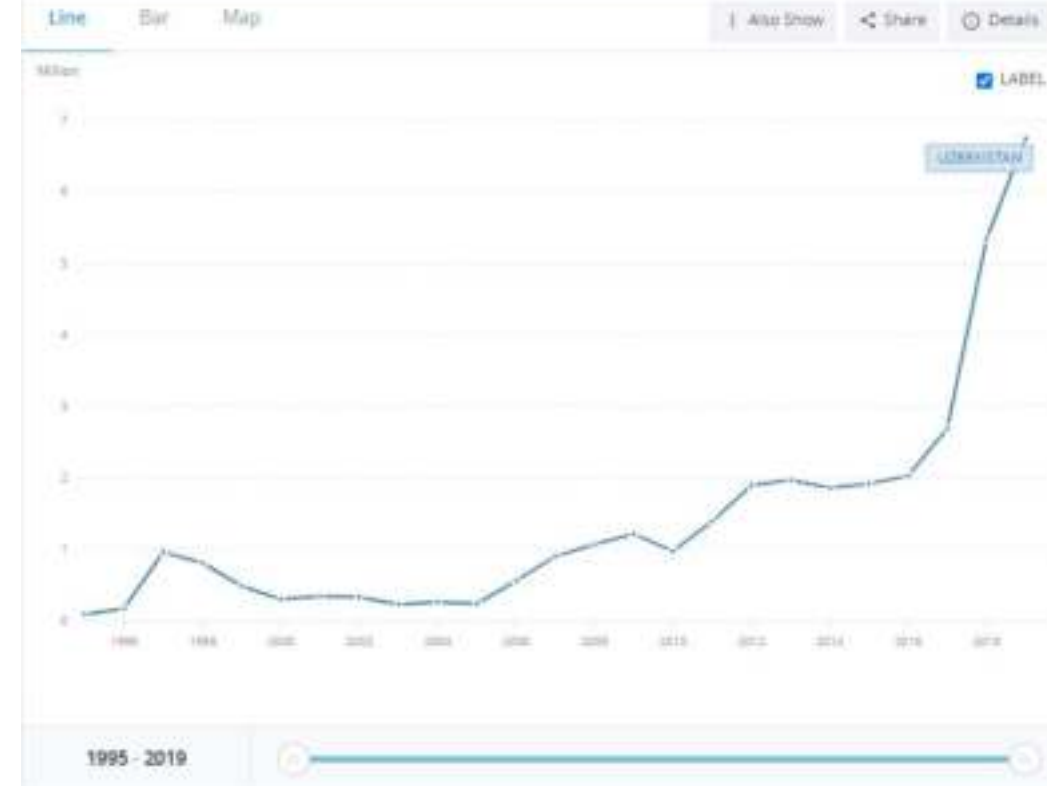
# Tourism in Uzbekistan

- In 2019 nearly 7 million international tourists visited
- Due to the COVID-19 pandemic, since March 2020, Uzbekistan has stopped
- Strong domestic tourism
- 95.5 % of the total number of visitors was citizens of (CIS) Commonwealth of Independent States

## International tourism, number of arrivals - Uzbekistan

World Tourism Organization, Yearbook of Tourism Statistics, Compendium of Tourism Statistics and data files.

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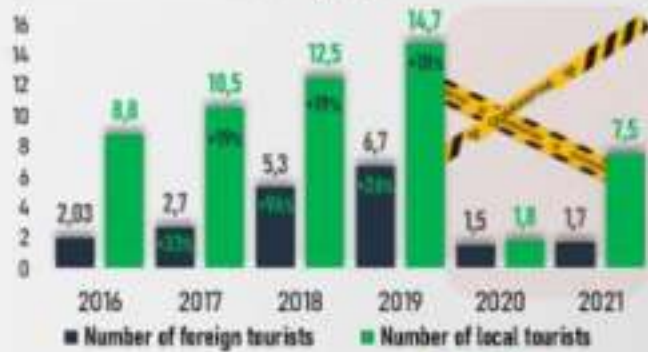
### Selected Countries and Economies

Country	Most Recent Year	Most Recent Value
Uzbekistan	2019	6,749,000

# Tourism in Uzbekistan

CERR  
CENTER FOR ECONOMIC RESEARCH AND REPORTING

Number of tourists visiting Uzbekistan in 2016-2020, (mln people)



overview for 2016-2020

## TOURISM IN UZBEKISTAN

**>60** More than 60 normative legal acts have been adopted

**90** A visa-free regime has been adopted for citizens of 90 countries



# SWOT Analysis: Strengths

- Strong vaccination rates and low transmission figures
- Proven track of domestic tourism (14.7 million in 2019)
- Booming regional tourist inflow (126.8 million in 2019)
- Diverse tourism product with Special Interest Tourism (Cultural/ethnic tourism, nature-based travel, Culinary tourism, so on)
- Comparatively untouched/unspoiled
- Government initiatives and support to keep industry alive



# SWOT Analysis: Weaknesses

- Demand for the industry reduced as a spill over effect of the pandemic
- Comparatively lack of infrastructure and superstructure
- Lack of educated and trained human resource (only 9 out of 56 Universities have specialized programs)
- Lack of co-ordination among stakeholders
- Language barriers
- Comparatively limited academic research made and connected/collaborated



# SWOT Analysis: Opportunities

- Revenge travel and staycation
- Ambitious Government initiatives for 2025 (Presidential Decree 2019)
- Investing more in tourism product diversification (health and wellness tourism, adventure tourism, Agro-tourism/Fergana valley, historical tourism)
- Support for the entrepreneurship (in service industries)
- Franchising and FDI opportunities
- Grants and projects by EU, ADB and similar bodies
- Novel innovative business models: hybrid models with human touch and technology



# SWOT Analysis: Threats

- New variations of Covid-19, new waves
- Global, regional, and national economic recession
- Lower disposable income of the people: diminishing the travel intention, less demand for leisure
- Direct and indirect employment loss (industry switching) in tourism/hospitality



# Future of Tourism in Uzbekistan

- The Republic of Uzbekistan is coming up consistently with reforms to develop the tourism
- Presidential Decree 2019: to be achieved by 2025
  - 11,810,000 foreign tourists visiting Uzbekistan
  - \$2,170 million exports of tourist services
  - 25,010,000 domestic tourism trips
  - 3,050 hotels and similar accommodation facilities
  - 64,000 rooms in accommodation facilities
  - 128,000 beds in accommodation facilities
  - 1,450 tour operators

Source: Decree of the President of the Republic of Uzbekistan dated August 13, 2019 №. PF-5781
- Travel and tourism is one of the best industry sector for this country [Uzbekistan] (State Tourism Development Committee, 2020)



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Thank you very much  
for your time and  
interest.

Any questions?

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