

International Congress on Economics, Management and Business Studies
Hosted Online from New York, USA
Date: 23rd November, 2026
Website: https://econferencia.com

CURRENT PROBLEMS OF FORMING THE NATIONAL TOURISM BRAND OF UZBEKISTAN IN THE INTERNATIONAL MARKET AND ENHANCING ITS COMPETITIVENESS

Sobirov Javohir G‘olibjon o‘g‘li
Alfraganus University, Faculty of Tourism,
Master’s student, group TvM/M-25-1

Berdiyorov Baxtiyor Sodiqovich
Candidate of Economic Sciences, Associate Professor,
Head of the Department of International Tourism Management,
Acting Professor Alfraganus University, Tashkent, Uzbekistan
E-mail: baxtiyorberdyorov@gmail.com
ORCID: 0009-0002-5820-3663

Abstract

The paper examines the current problems of forming the national tourism brand of Uzbekistan in the international market and of strengthening its competitiveness. Drawing on official statistics for 2021–2026 and the WEF Travel & Tourism Development Index, it shows that a six-fold rise in foreign arrivals, to 11.68 million in 2025, rests mainly on neighbouring markets and family visits, while export revenue per visitor declined. Fragmented brand architecture, a heritage-centred image and weak positioning in long-haul markets are identified as the key barriers, and measures for a unified, value-oriented national tourism brand are proposed.



International Congress on Economics, Management and Business Studies
Hosted Online from New York, USA
Date: 23rd November, 2026
Website: https://econferencia.com

Keywords: national tourism brand; destination branding; competitive identity; destination image; brand architecture; tourism competitiveness; Travel & Tourism Development Index; Uzbekistan.

Introduction

International tourism has fully recovered from the pandemic shock: according to the World Economic Forum, international arrivals reached a record 1.5 billion in 2025, and the sector's total contribution to the world economy amounted to $11.6 trillion. In such a market, as S. Anholt argues, every country, city and region has to compete with every other for its share of tourists, investors, students and international attention, which turns national reputation into a strategic economic asset [1, p. 1].

For Uzbekistan, tourism has become one of the leading sources of export earnings. In 2025 the country received 11.68 million foreign visitors (National Statistics Committee) and exported tourism services worth $4.8 billion (Kun.uz). The updated "Uzbekistan–2030" Strategy raises the target to 20 million foreign tourists a year by 2030, with an explicit emphasis on attracting high-spending visitors (Tourism Committee).

Quantitative growth, however, has outpaced the formation of a coherent national tourism brand. The country's tourism logo has been in use since 2013, and only the presidential decree of 18 July 2024 ordered a competition for a new national tourism brand (Gazeta.uz). Meanwhile, in the Travel & Tourism Development Index 2026 Uzbekistan lost four positions. This gap between growing tourist flows and a still weak international brand determines the relevance of the study.

The aim of the research is to identify the current problems of forming the national tourism brand of Uzbekistan in the international market and to substantiate measures for enhancing its competitiveness. The study applies comparative,

statistical and structural analysis of official data for 2021–2026, international index benchmarking and a systematic review of the literature on nation and destination branding.

Main Part

2.1. Theoretical basis of the national tourism brand

In modern place-marketing theory, a national tourism brand is understood not as a logo or slogan but as a managed system of identity, image and positioning that determines how a country is perceived as a destination. S. Anholt shows that a nation's reputation is formed through six natural channels: tourism, exported brands, government policy, investment and immigration, culture and heritage, and the people of the country [1, p. 25]. He stresses that advertising and graphic design yield a return on investment only when a well-defined product is offered to a well-defined target audience [1, p. 87]. K. Dinnie distinguishes nation-brand identity, which the country seeks to communicate, from nation-brand image, which target audiences actually hold, and treats their alignment through clear positioning as the core of brand strategy [2, ch. 2].

The competitiveness of a destination brand thus depends both on the attractiveness of its natural and cultural resources and on enabling conditions such as policy priority, transport infrastructure, price and safety. These conditions are benchmarked internationally by the WEF Travel & Tourism Development Index (TTDI).

2.2. Current state of inbound tourism and the country's international position

Table 1 summarises the scale and the quality of inbound tourism growth in Uzbekistan in 2021–2025.

Table 1. Key indicators of inbound tourism in Uzbekistan, 2021–2025

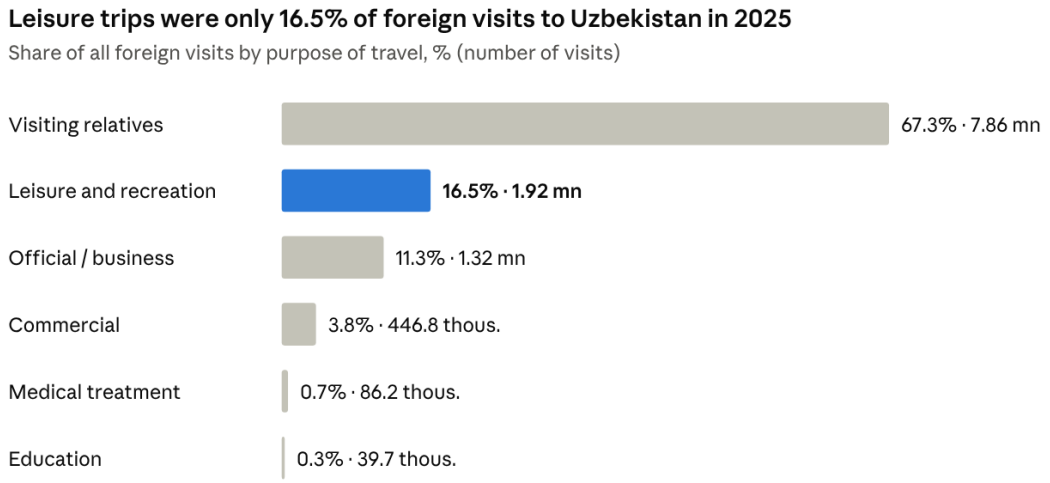
Indicator	2021	2022	2023	2024	2025
Foreign visitors, million	1.88	5.23	6.63	7.96	11.68
Growth of visitors, % y/y	–	178.0	26.8	20.1	46.7
Export of tourism services, US$ billion	0.42	1.61	2.14	3.50	4.80
Growth of tourism exports, % y/y	–	281.4	33.1	63.3	37.1
Export revenue per visitor, US$	224	308	323	440	411

Source: compiled and calculated by the author on the basis of data of the National Statistics Committee and the Tourism Committee of the Republic of Uzbekistan: visitors — bne IntelliNews; exports — 2021, 2022, 2023, 2024, 2025. Revenue per visitor = tourism exports ÷ number of visitors.

Over four years the number of foreign visitors increased 6.2 times and tourism exports 11.4 times, which confirms the role of tourism as a catalyst of economic and regional development [4]. The quality of this growth, however, is uneven. Export revenue per visitor peaked at $440 in 2024 and fell to $411 in 2025, because the record increase was generated mainly by neighbouring countries, whose citizens made 9.5 million visits, or 81.5% of the total (Kun.uz). In January–September 2026 arrivals reached 10.31 million, but growth slowed to 20.4% year on year (National Statistics Committee).

The international competitive position weakened in parallel. In TTDI 2026 Uzbekistan ranked 76th of 110 economies with 3.69 points out of 7, four positions and 1.1% below the comparable 2024 result, while Kazakhstan ranked 56th (4.09) and Kyrgyzstan 93rd (3.44) (Kursiv Uzbekistan). In the 2024 edition the country's strongest pillars were price competitiveness (25th) and safety and security (26th), whereas prioritisation of travel and tourism was its weakest pillar (The Times of Central Asia). The structure of demand by purpose of travel

(Figure 1) explains why volume growth has not yet translated into a strong international brand.



National Statistics Committee of the Republic of Uzbekistan, via bne IntelliNews · foreign visits in 2025 by purpose of travel

Figure 1. Structure of foreign visits to Uzbekistan by purpose of travel, 2025

Source: compiled by the author on the basis of data of the National Statistics Committee of the Republic of Uzbekistan (bne IntelliNews).

The dominance of family visits means that a large part of the growth is driven by kinship and cross-border ties rather than by the international appeal of the national tourism brand.

2.3. Key problems of forming the national tourism brand and its competitiveness

The analysis makes it possible to identify five interrelated problems.

1. **Unfinished brand system and fragmented brand architecture.** For more than a decade the country has been promoted with a logo registered in 2013, while regional tourism logos were developed separately; the Fergana regional brand presented in 2017 was even publicly accused of copying a concept from a Russian branding contest (Uzbek Travel). The 2024 decree launched a competition for a new national tourism brand, yet a brand works only as a long-term platform with a brand book, rules for regional sub-brands and a single responsible body. Without such a nation-brand architecture, national, regional and city identities compete with rather than reinforce each other [2].
2. **Gap between the projected and the perceived image.** K. Fayzullaev, S. Heldt Cassel and D. Brandt found that the image projected by the national destination management organisation is dominated by heritage and ancient cultural traditions, whereas user-generated content on Instagram depicts the country more diversely, largely through nature and experiences in the landscape [3]. The Silk Road positioning is valuable but not exclusive: it is shared with other Central Asian countries, China and Iran, and therefore differentiates Uzbekistan only weakly.
3. **Demand oriented to volume rather than value.** Two thirds of foreign visits in 2025 were made to see relatives, and leisure trips, the core target of a tourism brand, accounted for only 16.5% (Figure 1). Long-haul markets remain small: Germany generated 43.0 thousand visits, the United States 36.9 thousand and Japan 31.8 thousand (bne IntelliNews). The draft targets of 20 million tourists and $6 billion of tourism exports by 2030 (Visit Tashkent) imply about $300 per visitor, below the 2025 level of $411, so the targets themselves reproduce a volume-led model.
4. **Weak enabling conditions of competitiveness.** The decline in the TTDI and the low score for prioritisation of tourism show that the institutional base of the

brand lags behind demand. International observers name the shortage of English-language services and tourist-friendly infrastructure as the main constraint on the sector (Eurasianet). At the same time, price competitiveness declined in 75% of the economies covered by the TTDI in 2024–2026 (Kursiv Uzbekistan), so low prices alone cannot remain the country's main competitive argument.

5. **Spatial concentration of tourism.** Tashkent alone received 4.05 million foreign tourists in 2024 and earned $1.49 billion, about 43% of national tourism exports (UzDaily). Most international products are confined to the Tashkent–Samarkand–Bukhara–Khiva axis, although tourism produces its strongest effect on regional development when flows reach new territories [4].

Conclusions and Proposals

The study shows that Uzbekistan has achieved a breakthrough in the volume of inbound tourism but has not yet converted it into a strong and differentiated national tourism brand. Growth relies on neighbouring markets and family visits, export revenue per visitor fell in 2025, and the country's position in the TTDI weakened in 2026. The main causes are an unfinished brand system, a narrow heritage-centred image, weak enabling conditions and the concentration of tourism in a few cities.

To strengthen the national tourism brand and its competitiveness, the following measures are proposed:

1. Adopt a national tourism brand platform for 2026–2030 that includes a positioning statement, a brand book and an umbrella architecture with mandatory rules for regional and city sub-brands, and assign its management to a single brand council under the Tourism Committee.

2. Extend the brand promise beyond the Silk Road to living crafts, gastronomy, hospitality, nature and contemporary culture, testing the positioning through surveys in target markets and systematic analysis of user-generated content.
3. Differentiate brand communication by market: family, shopping, medical and event offers for neighbouring countries, and premium cultural, nature and MICE products for the United States, the Gulf states, India, China and Scandinavia, the priority markets of the new marketing strategy (Fergana).
4. Add value indicators to the "Uzbekistan–2030" targets, namely export revenue per visitor, the share of leisure trips and the share of long-haul markets, so that revenue per visitor does not fall below the 2024 level of $440.
5. Strengthen the TTDI pillars that limit competitiveness: raise the budget priority of international promotion, expand air connectivity and low-cost routes, introduce English-language navigation and service standards, and complete a single digital national tourism platform.
6. Introduce annual brand monitoring in 8–10 key markets, measuring awareness, image associations and intention to visit, and use the results to adjust campaigns and regional sub-brands.

Implementation of these measures will help transform Uzbekistan from a fast-growing regional destination into a recognisable and competitive international tourism brand.

References

1. Anholt, S. (2007). Competitive identity: The new brand management for nations, cities and regions. Palgrave Macmillan. https://doi.org/10.1057/9780230627727



1. Dinnie, K. (2022). Nation branding: Concepts, issues, practice (3rd ed.). Routledge. https://www.routledge.com/Nation-Branding-Concepts-Issues-Practice/Dinnie/p/book/9780367569891
2. Fayzullaev, K., Heldt Cassel, S., & Brandt, D. (2021). Destination image in Uzbekistan – heritage of the Silk Road and nature experience as the core of an evolving Post Soviet identity. The Service Industries Journal, 41(7–8), 446–461. https://doi.org/10.1080/02642069.2018.1519551
3. Astanakulov, O., & Goyipnazarov, S. (2023). Tourism as a catalyst for regional development: Uzbekistan's experience and economic prospects. Economic Annals-XXI, 204(7–8), 33–44. https://doi.org/10.21003/ea.V204-05