INTERNATIONAL JOURNAL OF TECHNOLOGY AND ACADEMIC RESEARCH

ISSN: 2224-6878 | Pakistan Volume 6, No. 10.

IF: 14.91 | 2026 http://waerasia.org/index.php/ijtar

THE CURRENT STATE OF INBOUND TOURISM DEVELOPMENT IN UZBEKISTAN: A SCIENTIFIC AND ANALYTICAL APPROACH

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Doi: https://doi.org/10.5281/zenodo.23218575

Abstract. This article provides a scientific and analytical study of the development trends of inbound tourism in Uzbekistan, its existing economic potential, and the priority directions for its expansion. The study examines tourist flows, tourism services exports, and all indicators related to targeted tourist visits based on official statistical data. In addition, the study proposes comprehensive development mechanisms aimed not merely at increasing the quantitative volume of tourist flows, but at enhancing their multiplicative economic efficiency.

Keywords: tourism, tourist flow, tourism demand, tourism exports, diversification, tourism infrastructure, digitalization, tourism cluster, sustainable tourism, multiplicative efficiency, regional development.

Introduction. Today, tourism is increasingly becoming one of the strategically important and promising service sectors of the Uzbek economy. The country's rich historical and cultural heritage, natural tourism resources, geographical location, and diverse opportunities for developing various types of tourism are further enhancing the economic potential of the tourism sector. The development of tourism has a positive impact not only on the activities of hotels and tourism organizations but also on the development of transport, catering, retail, entertainment, handicrafts, culture, and other service sectors. In particular, Paragraph 58 of Decree No. PF-21 of the President of the Republic of Uzbekistan, dated February 16, 2026, "On Additional Measures to Ensure the Consistent Continuation and Advancement to a New Stage of Reforms within the Priority Areas of the Country's Development until 2030," sets the objectives of "increasing the number of domestic tourists to more than 25 million, increasing the number of foreign tourists visiting the Republic to 20 million, and raising the share of the ourism sector in gross domestic product to 7 percent."[1] The Decree establishes important practical measures and strategic objectives aimed at achieving the target indicators set for the tourism sector. These include developing international cooperation in tourism, diversifying tourism services, digitalizing the tourism sector, improving regional tourism infrastructure, and developing specialized forms of tourism, including historical and cultural, pilgrimage, MICE, medical, and ecotourism. From a scientific perspective, an increase in tourist flows stimulates regional economic growth through a multiplicative effect. The actual economic impact of tourism is determined not only by the number of tourists but also by the duration of their stay in the country, the amount of money they

[1] Decree PD-21 number of the President of the Republic of Uzbekistan, dated February 17, 2026, "On Additional Measures to Ensure the Consistent Continuation and Advancement to a New Stage of Reforms within the Priority Areas of the Country's Development until 2030."

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spend on services, the types of services they consume, and the extent to which these expenditures contribute to the local economy. Therefore, tourism development should focus not only on increasing the number of tourists but also on maximizing the economic return generated by each tourist. Accordingly, the purpose of this study is to analyze the current state and key development trends of the tourism sector in Uzbekistan based on statistical data and to scientifically substantiate priority areas that can contribute to increasing the economic efficiency of tourism.

Literature Review. Foreign scholars have developed important scientific approaches to the theoretical and practical foundations of the tourism economy. Spanish economists J. Balaguer and M. Cantavella-Jordá, in their academic studies, assessed the long-term impact of international tourism on economic growth using econometric methods and substantiated its multiplier effect. Among Uzbek economists, I.S. Tukhliyev has scientifically examined the theoretical foundations of tourism, tourism resources, tourism products, and mechanisms for the innovative development of the tourism services market in his research and academic publications. A.A. Eshtaev has studied tourism industry management and marketing strategies, while S.A. Abdukhamidov has focused on the specific characteristics of regional tourism development. Although these studies have addressed the economic, regional, and service-related dimensions of tourism, there remains a need for more comprehensive research that evaluates tourist flows, tourist expenditures, length of stay, economic utility indicators, the structure of service consumption, and the distribution of tourism revenues across regions within a unified analytical framework.

Research Methodology. The study employed a combination of theoretical and empirical research methods. At the theoretical stage, systematic analysis, comparative analysis, and scientific abstraction were used to substantiate the conceptual aspects of tourism development. The study also applied statistical and dynamic analysis, comparative assessment, and growth-rate calculation methods. The analysis comprehensively examined the number of foreign tourists, the volume of tourism services exports, the purposes of visits, and the distribution of tourist arrivals by country of origin.

Analysis and Results. In recent years, the reforms implemented to develop the tourism sector in Uzbekistan have gone beyond simply increasing the number of tourists. They have increasingly focused on enhancing the role of tourism in the economy, diversifying tourism services, improving tourism infrastructure, expanding transport and logistics capacities, and strengthening the country's competitiveness in the international tourism market. In particular, "the **Concept for the Development of Tourism for 2019–2025"**[2] identified improving the quality of tourism services, developing new tourism products, expanding transport routes, promoting domestic and international tourism, and actively marketing tourism products in foreign markets as key priorities. In subsequent years, within the framework of these objectives, measures were implemented to expand domestic and international transport connections, develop tourism infrastructure, attract private-sector investment, introduce digital services, simplify visa procedures, and promote the country's tourism products in international markets. For this reason, from a scientific perspective, it is important to assess the outcomes of the tourism sector not only

[2] Decree PD-5611 number of the President of the Republic of Uzbekistan, dated January 5, 2019, "On Additional Measures for the Accelerated Development of Tourism in the Republic of Uzbekistan."

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through changes in the number of tourists but also based on the relationship between the geographical composition of tourist flows, the purposes of travel, and the economic value generated by tourists.

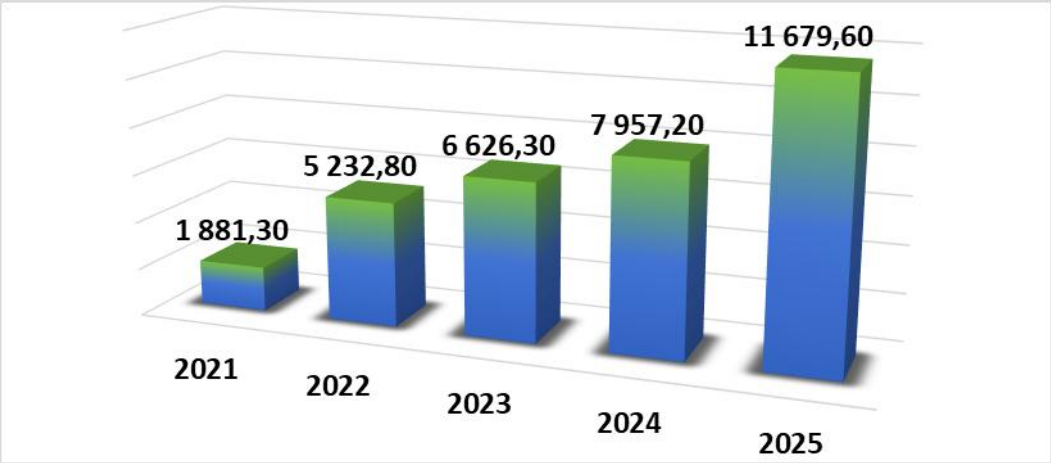


Figure 1. Number of Foreign Tourists Visiting Uzbekistan in 2021–2025 (thousand persons).[3]

For this reason, from a scientific perspective, it is important to assess the outcomes of the tourism sector not only through changes in the number of tourists but also based on the relationship between the geographical composition of tourist flows, the purposes of travel, and the economic value generated by tourists. Based on official data provided by the State Statistics Committee of the Republic of Uzbekistan, the following scientific and analytical observations can be made regarding selected indicators of foreign tourists visiting Uzbekistan during 2021–2025. According to the data presented in Figure 1, the number of tourists visiting Uzbekistan amounted to 1.88 million in 2021, while by 2025 it had reached 11.68 million. Thus, over the four-year period, tourist flows increased by approximately 6.2 times, representing an absolute increase of 9.8 million tourists. In other words, compared with 2021, the overall growth in tourist flows reached 520.7% in 2025. This result demonstrates that Uzbekistan's tourism market expanded significantly within a relatively short period. The growth observed in 2025 should not be interpreted as the result of a single factor; rather, it is more appropriate to view it as the combined outcome of a range of factors, including expanding tourism demand, improved transport connectivity, the development of tourism infrastructure, enhanced international promotion, and increased market activity.

[3] Prepared by the author based on official data provided by the Statistics Committee of the Republic of Uzbekistan.

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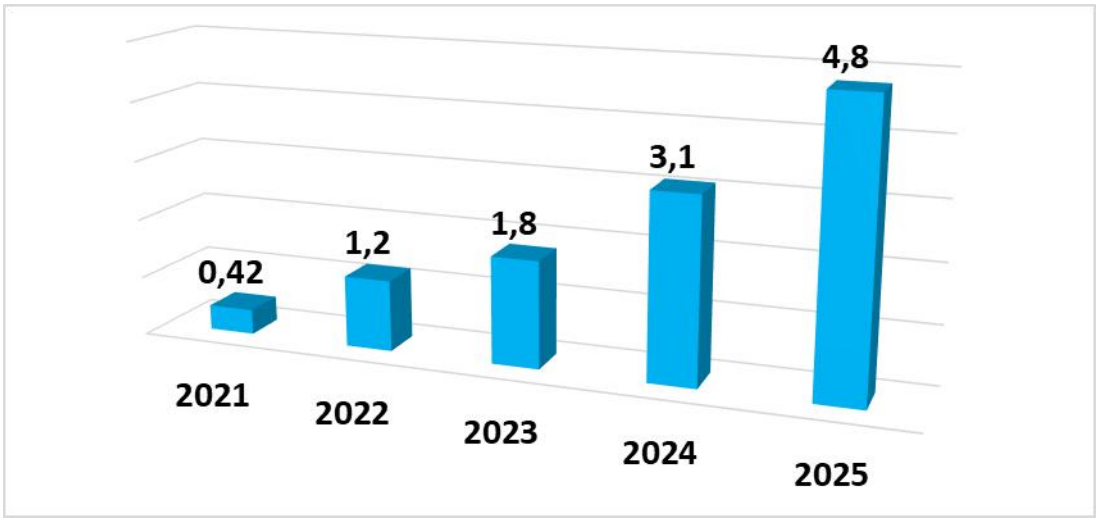


Figure 2. Tourism Services Exports in 2021–2025 (billion US dollars).[4]

According to the data presented in Figure 2, the volume of tourism services exports in Uzbekistan increased from USD 0.42 billion to USD 4.8 billion over the most recent five-year period, representing an approximately 11.4-fold increase. This growth indicates that the export potential of tourism services is becoming increasingly significant within the national economy. The main factors contributing to this growth include the expansion of foreign tourist flows, the increasing supply of tourism services, the development of sector-specific infrastructure, and the diversification of tourism products. This result also demonstrates the need to strengthen approaches aimed not only at increasing the number of tourists in the future, but also at developing tourism services with higher economic value, improving service quality, and increasing tourist expenditure within the country. Another important indicator is the distribution of foreign tourist arrivals(Figure 3) to Uzbekistan according to their specific purposes of travel. In 2025, among foreign nationals visiting Uzbekistan, visits to relatives accounted for 67.3%, leisure and recreation for 16.5%, business trips for 11.3%, shopping for 3.8%, medical treatment for 0.7%, and education for 0.3%. By country of origin, the largest tourist flows came from Kyrgyzstan, Tajikistan, and Kazakhstan, which

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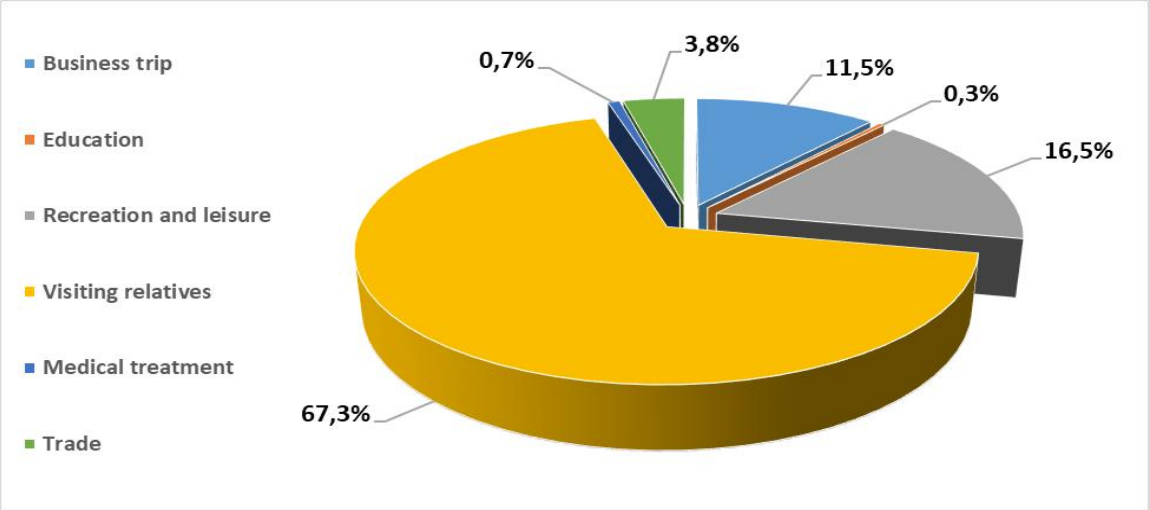


Figure 3. Distribution of Foreign Tourists Visiting Uzbekistan in 2025 by Purpose of Travel.[5]

together accounted for approximately 74% of the total. This distribution indicates that a significant share of Uzbekistan's tourist flows is driven by family ties and geographical proximity to neighboring countries. At the same time, the fact that leisure and recreation accounted for only 16.5% highlights the need to diversify tourist arrivals toward economically higher-value segments. Another important indicator is the number of visits made by citizens of the top 10 countries whose nationals visited Uzbekistan. Furthermore, according to the indicators presented in Figure 4, approximately 74.3% of the tourist flow to Uzbekistan originates from Kyrgyzstan, Tajikistan, and Kazakhstan. This can be attributed to geographical proximity, family ties, historical and cultural connections, and established transport links. As a result, Uzbekistan's tourism flow remains highly dependent on the markets of neighboring countries. Therefore, it is necessary to strengthen targeted marketing activities for European, Asian, and other distant markets, expand air connectivity, develop new tourism products, promote digital marketing, and align the quality of tourism services with international standards. In this regard, it would be appropriate to develop dedicated marketing strategies for markets such as the United States, European countries, China, India, South Korea, and the Gulf

[5] Prepared by the author based on official data provided by the Statistics Committee of the Republic of Uzbekistan.

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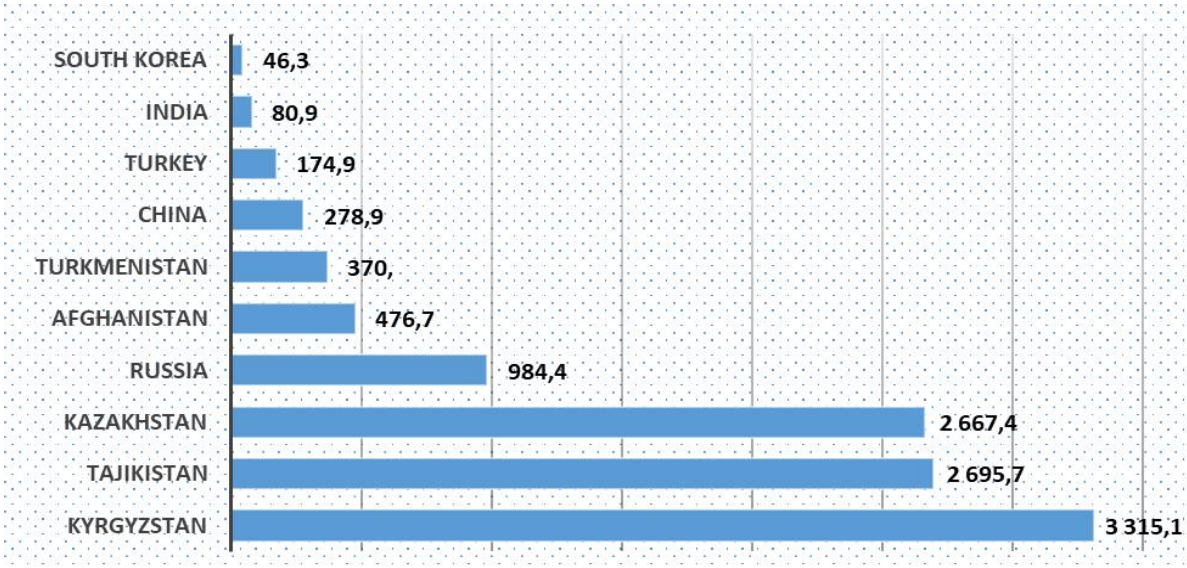


Figure 4. Number of visits by citizens of the top 10 countries who visited Uzbekistan in 2025 (thousand people).[6]

countries. Important tools for attracting tourists from these markets include participation in international tourism exhibitions, digital advertising, collaboration with influential media outlets and bloggers, B2B partnerships with local tour operators, expansion of direct air connections, and simplification of visa procedures. For example, "in 2025, roadshows, tourism exhibitions, more than 500 business meetings, digital platforms, and media campaigns were utilized in the Chinese market; as a result, the number of tourists arriving from China increased 3.7 times compared with 2024".[7]

Conclusion and Recommendations. The research findings demonstrate that the strategic importance of tourism in Uzbekistan is steadily increasing in terms of diversifying the economy, expanding the services market, enhancing export potential, and stimulating the socio-economic development of regions. Although the expansion of tourist flows reflects the quantitative growth of the sector, assessing this process solely through the increase in the number of tourists is insufficient from both scientific and economic perspectives. The actual effectiveness of tourism development is closely associated with the length of tourists' stays in the country, the structure of their expenditures, the level of service utilization, and their impact on regional economies. The analysis also indicates the existence of geographical and target-market concentration in Uzbekistan's tourism market. This situation requires the diversification of tourism products, the development of new geographical markets, and the strengthening of the country's competitiveness in the international tourism arena. From this perspective, the key priority of tourism policy should be a gradual transition from quantitative growth towards a model based on higher economic value creation and sustainable development. Based on these conclusions, it is

[6] Prepared by the author based on official data provided by the Statistics Committee of the Republic of Uzbekistan.

[7] http://gov.uz/oz/uzbektourism/news/view/113687

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advisable to strengthen targeted marketing strategies in international tourism markets and develop pilgrimage, gastronomic, ecotourism, medical, ethnographic, MICE, educational, and other tourism segments capable of generating high added value. Furthermore, it is necessary to establish regional tourism clusters, integrate tourism centers and emerging destinations into unified route systems, improve transport and logistics infrastructure, and introduce modern service standards. In addition, the digitalization of tourism, improvement of service quality, and development of a skilled human capital base should be regarded as important factors of sectoral development. Overall, Uzbekistan's tourism development policy should focus not merely on increasing the number of tourists, but rather on ensuring the economic efficiency of tourist flows, improving service quality, achieving greater regional balance, and promoting sustainable development.

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