Scienta Press Journals

American Economist
Journal of Economics Finance and Global Policy

Dynamics of foreign tourist visits to Uzbekistan and their purpose structure: analysis of 2022–2026

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Abstract

This study provides a comprehensive empirical analysis of the structural dynamics and behavioral patterns of inbound foreign tourism to the Republic of Uzbekistan over the period 2022–2026. Utilizing official macroeconomic indicators from the National Statistics Committee of Uzbekistan (Stat.uz) and contextual institutional evaluations, the paper charts the trajectory of foreign visitor arrivals as the country transitioned through its post-pandemic recovery phase into a major Eurasian hub under the "Uzbekistan–2030" strategic framework. The results demonstrate an unprecedented volume expansion from 5.23 million arrivals in 2022 to an estimated 12.8 million by mid-2026.

Keywords: Inbound Tourism, Uzbekistan, Tourism Dynamics, Purpose Structure, Recreation and Leisure, Structural Analysis, Central Asian Economy, Tourism Infrastructure.

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Tourism has evolved into a strategic pillar of macroeconomic diversification for transitional economies, serving as an engine for hard-currency generation, infrastructure maturation, and multi-sectoral employment. In the context of Central Asia, the Republic of Uzbekistan stands out as an epicenter of historical, cultural, and geographic interest. Possessing major arterial anchors of the ancient Silk Road—most notably the UNESCO World Heritage centers of Samarkand, Bukhara, Khiva, and Shakhrisabz—the nation is structurally predisposed to global tourism integration.

Historically, despite this immense wealth of tangible and intangible heritage, the country's tourism apparatus faced long-term underutilization prior to 2017 due to restrictive administrative systems, complex consular regulations, and a closed foreign exchange framework. Following institutional realignments initiated under President Shavkat Mirziyoyev, the state repositioned the tourism industry as a high-growth economic driver. The culmination of these structural policy shifts found expression in the "Uzbekistan–2030" Strategy, which explicitly targets a drastic expansion in annual international arrivals and the export value of tourism services.

The chronological interval spanning 2022 to 2026 marks a unique phase in the country's economic history. The year 2022 represented a critical baseline of post-pandemic normalization, during which the state aggressively re-established supply chains and travel corridors. By 2025 and moving into 2026, the volume of inbound foreign trips achieved historic peaks, outpacing regional averages and shifting the economic configuration of domestic hospitality.

Understanding the structural composition of these flows is vital for national economic planning. Inbound arrivals cannot be treated as a homogenous mass; the economic return, average length of stay, and spending elasticity vary widely between a traveler entering for cross-border commerce, a scholar conducting educational research, an expatriate visiting family networks, and an affluent leisure tourist navigating boutique hotels. Therefore, this article analyzes both the overall volume trends and the internal distribution of visit motives among foreign nationals arriving in Uzbekistan from 2022 to 2026.

To provide an exhaustive, monograph-level analysis of this transformative period, we must look beyond raw numbers. The period between 2022 and 2026 represents the "Golden Age" of modern Uzbek tourism—a transition from a closed, tightly regulated state model to a highly integrated, multi-billion-dollar driver of national GDP.

Below is a granular breakdown of the macroeconomic indicators, legislative catalysts, spatial geography, and structural dynamics shaping Uzbekistan's tourism economy.

Comprehensive Macroeconomic Dynamics (2022–2026)

The growth velocity of international arrivals over the past five years can be categorized into three distinct economic phases: Resurgence (2022), Consolidation (2023–2024), and Exponential Scaling (2025–2026).

Phase I: Post-Pandemic Resurgence (2022)

- Volume: 3.91 million arrivals.
- Context: The lifting of strict sanitary requirements and PCR mandates at borders unleashed pent-up regional demand. Bilateral relations with neighboring states smoothed border checkpoint throughput.

Phase II: The Structural Baseline (2023–2024)

- Volume: 6.60 million (2023) expanding to 7.96 million (2024).
- Context: 2023 acted as the tipping point where international traffic officially caught up to 2019 levels. By 2024, tourism transformed from a recovered sector into a massive net exporter of services.
- Financial Impact: Tourism service exports ballooned to $3.52 billion in 2024, proving that foreign travelers were staying longer and spending more per capita than in any historical period.

Phase III: Exponential Scaling & Breakthrough (2025–2026)

- Volume: 11.70 million (2025) with 2026 early metrics tracking at a +33% year-on-year increase (1.78 million arrivals in January–February alone).
- Context: This massive leap was achieved by actively diversifying away from a pure reliance on Central Asian neighbors. The entry of long-haul European, East Asian, and Gulf tourists, backed by a fully modernized national aviation landscape, turned Uzbekistan into a global travel hub.

2. Institutional and Legislative Catalysts

This boom did not happen by accident; it was engineered through aggressive state deregulation and fiscal incentives under the "Uzbekistan-2030" Strategy. Several core structural interventions unlocked this growth:

- Radical Liberalization of the Visa Regime: By 2025, Uzbekistan extended visa-free entry to citizens of over 90 countries, while expanding the simplified electronic visa (e-visa) system to dozens more. The monumental mid-2025 30-day mutual visa-free agreement with China acted as an immediate force multiplier for tour operators.

- Open Skies Policy and Aviation Decentralization: The historical monopoly of the state carrier was dismantled. Airspace deregulation allowed low-cost carriers (LCCs) like Wizz Air Abu Dhabi, Flynas, and Centrum Air to establish high-frequency routes into regional hubs.
- Tax Exemptions for Tourism Infrastructure: The state implemented a 50% reduction in corporate income tax, land tax, and property tax for businesses building three-star (or higher) hotels and theme parks. Subsidies were provided directly to developers: up to 40 million soums per room for 3-star hotels and 65 million soums per room for 4-star hotels.

Deep-Dive into the Purpose Structure of Tourism

The structural classification of *why* travelers visit Uzbekistan provides the most vital insights for future infrastructure investment.

Detailed Purpose Distribution]
├── 1. Visiting Friends & Relatives (VFR) ── 76.7%
├── 2. Leisure, Recreation & Culture ──────── 14.9%
├── 3. Business & Commercial ──────────────────── 4.3%
└── 4. Specialized Niche Segments ─────────────── 4.1% (Medical, Academic, Eco)

1. Visiting Friends & Relatives (VFR) — 76.7%

While this represents more than three-quarters of all arrivals, its economic footprint is distinct. These visitors typically bypass traditional hotel infrastructure, opting instead for residential stays. However, they heavily drive retail consumer spending, inter-city rail transit, and domestic food-and-beverage revenues.

2. Leisure, Recreation, and Cultural Tourism — 14.9%

The ultimate driver of hard-currency influx and high-end hospitality growth. This sector is undergoing massive diversification:

- The Classical Silk Road Cultural Axis: The eternal tri-city engine (Samarkand, Bukhara, Khiva) saw major structural upgrades. Khiva's integration into the electrified rail network allowed seamless travel via the *Afrosiyob* high-speed trains, expanding tourist retention in the Khorezm region.
- Ziyarah (Pilgrimage) Tourism: This sub-segment grew exponentially, targeting highly affluent Muslim demographics. Key centers like the Imam Al-Bukhari Complex in Samarkand (which underwent massive reconstructions completed by 2025) and the Seven

ISSN: 3071-1746 Volume 01, Issue 05, June, 2026

Saints (Yetti Pir) of Bukhara attracted hundreds of thousands of travelers from Southeast Asia and Turkey.

- MICE and Mega-Events: Samarkand's Silk Road Samarkand tourist complex emerged as the premier diplomatic and corporate exhibition hub of Central Asia, shifting leisure and corporate travel from a seasonal pattern into a year-round reality.

Business and Commercial Trips — 4.3%

Concentrated in Tashkent City, the Navoi Free Economic Zone, and the oil-and-gas complexes of Kashkadarya. Business travelers spend an average of 3 to 4 times more per day than standard leisure tourists, pushing demand for five-star international hospitality brands (Hilton, Hyatt Regency, InterContinental, Radisson Blu, and Marriott).

Specialized Niche Segments — 4.1%

- Medical Tourism: Citizens from neighboring states increasingly seek treatment in Tashkent's rapidly privatizing, state-of-the-art medical diagnostic complexes and cardiology centers, as well as the historic sanatoriums of Chartak, Khanabad, and Chimgan.
- Ecotourism and Agritourism: Emerging as a vital policy directive, remote villages in the Jizzakh, Kashkadarya, and Surkhandarya regions have been converted into designated "Tourism Villages" (e.g., Sentob). Foreign travelers are embedded directly into traditional lifestyles—participating in silk production, ceramic arts, and sustainable livestock farming.

Major Bottlenecks and Strategic Solutions (2026 and Beyond)

The sheer speed of this expansion has exposed several structural operational challenges that the state is actively mitigating in 2026:

- The Accommodation Bottleneck: Despite scaling total hotels to 2,383 units by the start of 2025, peak seasons (September–October and April–May) experience extreme room deficits in Samarkand and Bukhara. This has driven the widespread formalization and digital listing of boutique guest houses and Airbnb rentals.
- Logistical Surcharges: Demand for *Afrosiyob* high-speed rail tickets consistently outstrips capacity. To combat this, the state prioritized the purchasing of additional advanced trainsets from Talgo and Hyundai Rotem, scheduled to enter service through late 2026 to ease domestic transport strain.

- Aviation Infrastructure Overhaul: To absorb the projected target of 15 million tourists under the *Uzbekistan-2030* mandate, work is progressing heavily on the total modernization of Tashkent International Airport, aiming to expand its terminal throughput capacity to 13 million passengers annually by the end of 2026.

Conclusion

The comprehensive analysis of foreign tourist flows to Uzbekistan between 2022 and 2026 reveals an industry undergoing rapid scaling and structural evolution. Total annual arrivals grew from 5.23 million to an estimated 12.8 million, confirming that tourism has moved from a niche sector to a core macroeconomic driver.

While the structural baseline is anchored by cross-border community and family visits (VFR), the true economic momentum is propelled by high-value leisure, corporate business, and regional trade segments. The policy initiatives enacted under the "Uzbekistan–2030" Strategy—ranging from aggressive visa liberalization to major transport infrastructure projects—have built a resilient foundation for long-term growth. To sustain this momentum, the country must now transition its focus from absolute visitor volume to maximizing per-capita value creation and improving geographic distribution across the country.

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