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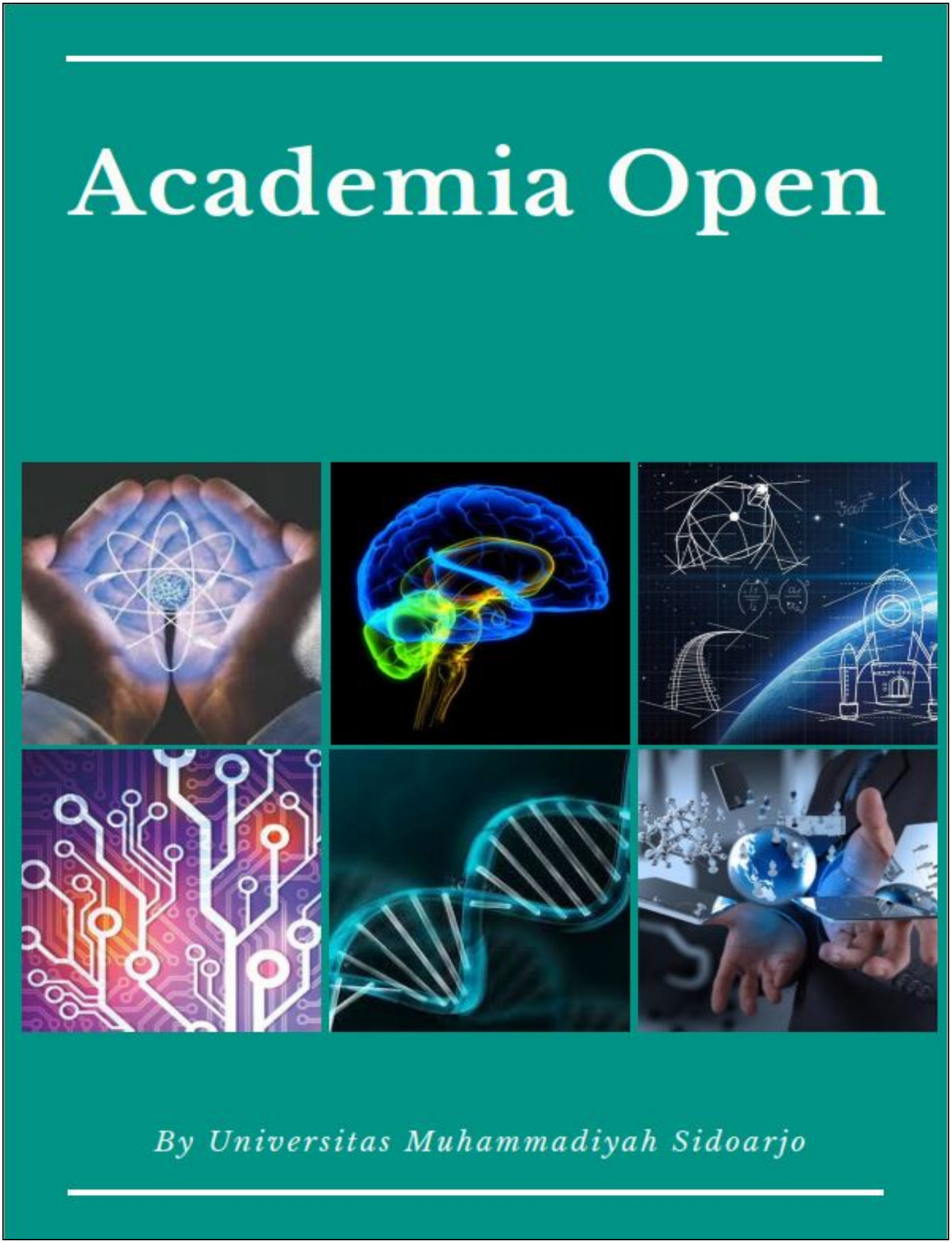


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# Strategic Foresight Scenarios for Tourism Development in Uzbekistan

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## Abstract

**General Background:** Tourism is increasingly recognized as a strategic sector within Uzbekistan's national economy, demonstrating robust growth and rising contributions to GDP in recent years. **Specific Background:** Despite impressive gains, the sector remains vulnerable to global disruptions, such as pandemics, highlighting the need for adaptive and forward-looking strategies. **Knowledge Gap:** While foresight technologies are gaining traction globally in tourism planning, their application in Uzbekistan remains underexplored and institutionally undeveloped. **Aims:** This study investigates the role of foresight methodologies—scenario analysis, horizon scanning, and long-term forecasting—in shaping strategic tourism development in Uzbekistan and proposes a structured framework for their implementation. **Results:** Empirical analysis revealed a strong correlation ($r \approx 0.99$) between tourist inflows and export revenues, and scenario modeling projected 2030 arrivals ranging from 10 to 14 million tourists depending on external and policy factors. **Novelty:** The study presents the first integrated application of foresight tools in Uzbekistan's tourism context, including custom growth scenarios and institutional foresight recommendations. **Implications:** Embedding foresight into national tourism planning will enhance Uzbekistan's resilience to global shocks, align sectoral strategies with market trends, and strengthen its position as a leading destination in Central Asia.

**Highlight :**

- Foresight tools such as scenario planning and forecasting are crucial for anticipating and shaping the future of Uzbekistan's tourism sector.
- Tourism recovery post-COVID has shown strong momentum, with projections aiming at 10–14 million tourists by 2030.
- Strategic integration of foresight into policy can enhance resilience, competitiveness, and sustainability in national tourism development.

**Keywords :** Foresight, Strategic Planning, Tourism Development, Uzbekistan, Scenario Analysis

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**Introduction**

In the Republic of Uzbekistan, tourism has been designated as one of the country's strategic economic sectors, and the industry has shown rapid development in recent years [1]. By 2019, the country attracted 6.7 million foreign tourists, with tourism service exports reaching $1.6 billion. Compared to the early 2010s, this represented a multi-fold increase, with tourism's share in GDP rising from 2.3% in 2017 to around 3–4% by 2019. The rapid development of tourism has been actively supported at the state policy level — under the Tourism Development Concept adopted in 2019, the goal was set to reach 9 million annual foreign tourist arrivals and increase the sector's share in GDP to 5% by 2025 [2]. Later, the target was doubled, aiming for nearly 12 million foreign tourists by 2025. To transform the sector into a national priority, a series of reforms were introduced, including visa liberalization, infrastructure improvements, and expanded promotional campaigns. As a result, Uzbekistan was recognized by the World Economic Forum's Travel and Tourism Development Index as one of the fastest-growing tourism destinations, ranked as the best emerging destination by the 2024 Wanderlust Awards, and identified as the most attractive tourism destination among CIS countries [3]. At the same time, global risks and rapidly changing trends are posing new challenges to the tourism sector. The COVID-19 pandemic, which began in 2020, dealt a severe blow to the industry — tourist arrivals dropped to just 1.5 million in 2020, a 77% decrease from the previous year. While recovery began in 2021, there is no guarantee that similar disruptions will not recur. Therefore, incorporating multiple future scenarios into strategic tourism planning has become critically important, making the adoption of foresight approaches highly relevant. The concept of foresight first emerged in the mid-20th century as a practice of future modeling and planning and is now widely used across areas from public administration to corporate strategy [4],[5], [6]. Foresight is not simply about prediction; it is about envisioning and shaping realistic future possibilities, allowing stakeholders to design purposeful future outcomes. As noted by I.A. Abdurakhmonov, foresight involves identifying events and processes several years in advance and anticipating their near- and long-term prospects, enabling the identification of solutions and directions that support sectoral growth. Thus, foresight technologies assist strategic decision-making by enabling continuous analysis of the external environment and proactively accounting for risks and opportunities [7].

Objective and Tasks

The objective of this study is to analyze the role and effectiveness of applying foresight technologies in the strategic development of tourism in Uzbekistan and, based on this analysis, to develop forward-looking recommendations for the sector [8]. To achieve this objective, the following tasks were set: (1) study the theoretical foundations and international experience of using foresight in tourism planning; (2) analyze the current state and trends of Uzbekistan's tourism market; (3) develop possible scenarios and forecasts for tourism development using foresight methods; and (4) formulate policy conclusions and recommendations for the sector based on the results obtained.

# Methodology

This study drew on scientific-theoretical sources related to tourism development, international organization reports, and national statistical data [9]. Based on these sources, the research applied a combination of general and specific methods, including analysis and synthesis, comparative analysis, statistical analysis, correlation and regression analysis, expert evaluation, and forecasting [10]. First, a thorough review of the scientific literature and previous research on the topic was conducted, focusing on international experiences in applying foresight technologies within tourism development. This included examining modern academic contributions in the field of tourism futurology, such as scenario planning and strategic foresight applications — for example, studies on future scenarios for improving Iran's tourism image and projects dedicated to tourism foresight in Europe [11]. Tourism statistics were sourced from Uzbekistan's national statistical agencies and the Ministry of Tourism and Cultural Heritage, as well as from open official sources (published reports, media publications). To analyze the dynamics of key indicators over the 2017–2023 period, tables and graphical methods were employed. The relationship between tourism service exports and tourist flows was evaluated using a correlation coefficient calculated through Pearson's formula.

$$r = \frac{\sum_{i=1}^{n}(x_i - \bar{x})(y_i - \bar{y})}{\sqrt{\sum_{i=1}^{n}(x_i - \bar{x})^2 \cdot \sum_{i=1}^{n}(y_i - \bar{y})^2}},$$

**Figure 1.**

In this analysis, $x_i$ represents the number of foreign tourists in year □□, and □□represents the value of tourism service exports in the corresponding year. The terms □□and □□¯ denote the average values of these indicators, and □□ is the number of years considered [12]. The calculated correlation coefficient demonstrates that the relationship

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between the tourism indicators is not random but shows a clear and strong trend (the results are presented in the following section). To plan for the future, several potential scenarios were developed, taking into account both external and internal factors. These scenarios were constructed based on the experiences of other countries, expert forecasts, and the method of trend extrapolation [13]. For long-term projections, an exponential growth model was applied, and the necessary calculations were carried out. Specifically, the annual average growth rate of foreign tourist arrivals (□□) and the specified time interval (Δ□□) were used to estimate the dynamics of tourist numbers, according to the following formula:

$$N(t2)=N(t1)\,(1+g)^{\Delta t},$$

Here, $Nt_1$ represents the number of tourists in the base year, and $Nt_2$ represents the projected number of tourists in the target future year. Using this model, quantitative forecasts for tourism development up to the year 2030 were produced under three scenarios: inertial, optimistic, and pessimistic. Additionally, the study theoretically examined the potential use of expert-based approaches (such as organizing foresight sessions) and the Delphi method to assess the future state of supply and demand in the tourism sector [14].

Figure 1. Key Stages of the Strategic Foresight Process (translated): 1. Defining the scope (identifying the objectives and boundaries of the activity or project);

2. Scanning trends and factors (detecting critical changes and drivers);

3. Developing scenarios and forecasting (modeling possible future states);

4. Creating a future vision (formulating a preferred future perspective);

5. Backcasting (planning backward from the selected future model to determine necessary steps);

6. Implementation (executing the chosen strategy and continuously evaluating results).

These stages illustrate the universal process of strategic foresight. Throughout the implementation, it is crucial to consider aspects specific to the tourism sector — such as the attractiveness of destinations, global changes shaping tourist demand (e.g., climate change, digital technologies), and the level of cooperation among stakeholders (government, tour operators, local communities, and tourists). By involving these stakeholders in the foresight process, it is possible to gather richer data and develop more realistic and actionable scenarios.

# Literature Review

The concept of strategic forecasting and foresight was first applied in state policy and business planning in the United States and European countries in the 1960s. While foresight was originally focused on military-strategic analysis and technological innovation scenarios, its areas of application have significantly expanded in recent decades. Today, foresight methods are also applied in fields such as regional economic development, urban planning, education, and tourism. Foresight is considered a systematic and participatory approach that enables the identification of future trends, the development of possible scenarios, and the selection of optimal strategic directions. Researchers describe foresight as a process of “anticipating and co-creating the future,” meaning it is not merely about forecasting but also about discussing and collaboratively designing a desired future vision [15]. In recent years, scholarly literature on the application of foresight and scenario methods in the tourism sector has emerged internationally. The World Tourism Organization (UNWTO) has also shown significant attention to studying future tourism trends — for example, in 2022, during the Tourism Congress, a session titled “Decoding the Future of Tourism — Foresight and Scenarios” was held, reflecting this interest. From a scientific perspective, the COVID-19 pandemic has sharply increased the need for scenario analysis in tourism. Many researchers have attempted to predict the post-crisis situation through various scenarios. For instance, Albert Postma and co-authors proposed four alternative scenarios for the future of tourism and emphasized the crucial role of strategic foresight in this process. Postma noted that by broadly applying scenario planning in tourism practice, competitiveness can be enhanced, as organizations become better able to monitor external environments and adapt to change in a timely manner. Similarly, Hartmann highlighted that scenario development forces tourism organizations to regularly analyze external forces and remain prepared for emergencies. Noteworthy examples also exist regarding the concrete application of foresight technologies in tourism in specific countries. For example, in Iran, studies have explored ways to enhance the country’s tourism brand reputation by developing future scenarios. In that research, a Delphi-based expert survey was conducted, leading to the formulation of four alternative scenarios aimed at boosting Iran’s tourism appeal up to 2040. Similar approaches are observed in countries like Turkey, Malaysia, and South Korea, where long-term strategies are being updated to reflect future tourism trends such as digitalization, ecological tourism, and personalization.In the context of Uzbekistan, however, scientific research on foresight remains relatively limited. Nevertheless, discussions about global trends affecting tourism and the importance of accounting for them are beginning to appear in local academic discourse. For example, in a 2023 article, A.A. Eshtaev analyzed external PEST trends (political, economic, social, and technological factors) influencing Uzbekistan’s tourism sector and outlined their developmental trajectories. The author emphasizes the need to incorporate these global changes and processes when developing tourism development strategies.

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Additionally, local sources discuss innovative approaches in the tourism sector (for example, smart tourism technologies, digital marketing), noting that these elements will play a crucial role in future development. All of these, in essence, are components of foresight analysis, as they aim to integrate tourism activities with the changing external environment. In conclusion, the literature review shows that the application of foresight technologies in the tourism sector is highly relevant, and there is already initial practical evidence of its effectiveness. However, under Uzbekistan's specific conditions, research in this area remains insufficient. This study aims to address this gap and provide scientifically grounded recommendations for introducing the foresight approach into strategic tourism planning in the country.

# Results and Analysis

To chronologically analyze the recent state and dynamics of Uzbekistan's tourism services market, a table was compiled covering the main indicators for the period 2017–2022 (Table 1). It presents the number of foreign tourists visiting the country and the value of tourism services consumed (exported) by them, broken down by year.

| Year | Number of Foreign Tourists (million people) | Tourism Service Exports (million USD) |
|---|---|---|
| 2017 | 2.7 | 531 |
| 2018 | 5.3 | 1,041 (estimated) |
| 2019 | 6.7 | 1,600 |
| 2020 | 1.5 | 261 |
| 2021 | 1.9 | 422.1 |
| 2022 | 5.2 | 1,600 |

**Table 1.** *Key Indicators of Uzbekistan's Tourism Sector (2017–2022)*

Note: The 2018 tourism service export value is an estimated figure (based on the 2017 and 2019 trend).

Source: Ministry of Tourism and Cultural Heritage data; State Statistics Committee data.

The data in the table above show that the tourism sector experienced rapid growth between 2017 and 2019. The number of foreign tourist arrivals increased from 2.7 million in 2017 to 6.7 million in 2019, nearly tripling over three years. Correspondingly, the volume of tourism service exports rose from $531 million in 2017 to $1.6 billion by the end of 2019. This sharp growth was driven by several measures, including the introduction of a visa-free regime for citizens of 64 countries in 2018, the opening of borders with neighboring countries, and the launch of new international flights and railway routes. Growth momentum was maintained in 2019, with a 25% increase in foreign tourist arrivals. Notably, the share of tourists coming from non-Central Asian countries (such as Europe, the USA, and others) also significantly increased in 2019.However, in 2020, the global pandemic caused a sharp contraction in tourism flows — only 1.5 million foreign tourists visited during the year, representing a 77% decline compared to 2019. Tourism service exports fell to $261 million, nearly five times lower than the previous year (Table 1). This decline mirrored global trends: international tourist arrivals worldwide dropped by 73% in 2020 compared to 2019. Under pandemic conditions, Uzbekistan's tourism sector became one of the hardest-hit industries — many enterprises in the sector suspended operations, and hotel and sanitation infrastructure suffered substantial damage. Starting from 2021, the sector entered a recovery phase. That year, the number of foreign tourists reached 1.9 million (+27% compared to 2020), and tourism service exports rose to $422 million. This recovery was influenced by the gradual lifting of entry restrictions, the introduction of a "green countries" list, and the implementation of programs targeting domestic tourism. In 2022, the pace of recovery accelerated significantly, with 5.2 million tourists arriving — nearly triple the number from 2021. By the end of 2022, tourism service exports reached $1.6 billion, fully returning to pre-pandemic levels. Additionally, domestic tourism also saw active growth in 2022, with the number of local travelers within the country reaching 11.3 million, representing a 107% increase compared to 2017.According to official statistics for 2023, 7.3 million foreign tourists were served, marking a ~40% increase over 2022. However, data from the Tourism Committee noted in its early 2024 report that the total number of foreign visitors for 2023 was recorded at 10.2 million, and tourism service exports reached $3.5 billion. This discrepancy likely arises from differences in accounting methodology — official statistics only include visitors who stayed at least one night, reporting over 7 million, which already approached the 2019 record.The sharp recovery in tourist flows in 2023 was driven by the rising number of visitors from Russia and Central Asia, as well as the opening of new tourist complexes in Khiva, Bukhara, and Samarkand. For example, 2024 was declared the "Year of Uzbekistan Tourism," with plans to further boost tourist inflow through active promotion in the Chinese and Russian markets. The year-end analysis shows a very strong and consistent relationship between the number of tourists and tourism revenues. Based on the data from Table 1, the Pearson correlation coefficient was calculated as r≈0.99r approx 0.99r≈0.99, meaning that increases in foreign tourist flows lead to proportional increases in tourism export revenues (with r→1r \to 1r→1 indicating an almost perfectly linear trend). This suggests that under Uzbekistan's conditions, investments in tourism and efforts to attract travelers have a clear and direct impact on increasing domestic foreign currency earnings. Considering this, it is


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advisable to apply advanced forecasting methods to predict tourism sector development indicators for the coming years. Using a foresight approach in the tourism sector, we formulated three alternative scenarios for the period up to 2030: pessimistic, inertial (baseline), and optimistic. The projected evolution of foreign tourist flows under these scenarios is presented in Table 2.

| Scenario Type | Average Annual Real Growth (2024–2030) | 2030 Forecast: Number of Tourists (million) |
|---|---|---|
| Pessimistic | ~4% | 10 ± 0.5 |
| Inertial (Baseline) | ~7% | 12 ± 0.5 |
| Optimistic | ~10% | 14 ± 1.0 |

**Table 2.** *Possible Scenarios for Foreign Tourist Flows by 2030*

**Source: Author's analysis**

According to the pessimistic scenario, if global crises recur or domestic reforms are implemented sluggishly, the flow of foreign tourists may reach only around 10 million per year by 2030. Under the baseline inertial scenario, where pre-pandemic trends are restored and annual growth of 7% is maintained, approximately 12 million foreign tourists are expected by 2030. The optimistic scenario envisions an average annual growth rate of about 10%, which could bring international arrivals close to 14 million by 2030. Of course, for the optimistic scenario to materialize, several conditions must be met: mobilization of financial resources, rapid infrastructure development, increased investment in tourism regions, strengthened marketing and PR activities, among others. Current 2023 performance and official plans point toward the realism of this optimistic path — for example, the target of 11 million foreign tourists set for 2025 is expected to be achieved as early as 2024. Moreover, the draft Tourism Development Strategy sets an ambitious goal of reaching 20 million foreign tourists by 2040. To meet such a major milestone, calculations suggest that an average annual growth rate of no less than 6–7% must be sustained over the next 15 years. This trajectory aligns closely with the optimistic scenario proposed in this study. The scenario analysis shows that Uzbekistan's tourism sector can realistically achieve its strategic objectives (such as reaching double-digit annual tourist figures — e.g., 15 million by 2030). However, external factors (such as the global economic situation, geopolitical conditions, and regional competition) will also have a significant impact. For example, neighboring Kazakhstan doubled its foreign tourist numbers from 4.7 million in 2022 to 9.2 million in 2023, signaling intensifying tourism competition in Central Asia. Therefore, Uzbekistan must continuously enhance the competitiveness of its tourism products and expand its visitor geography by tapping into new markets. This is precisely where foresight analysis becomes valuable — it allows stakeholders to account for competitor actions, monitor regional trends, and swiftly adjust strategies in line with relevant scenarios.

# Discussion

As the results presented above show, Uzbekistan's tourism sector possesses high potential and momentum, but achieving its strategic goals requires a systematic approach. Foresight technologies are regarded as a modern tool for such systematic strategic planning. Through foresight, both current and future factors affecting tourism can be comprehensively analyzed, possible scenarios ("future landscapes") can be discussed years in advance, and the most optimal pathways can be selected. The data collected in this study demonstrate that if strategic planning is based solely on a single forecast, it risks lagging behind evolving realities. For example, the sectoral concept adopted in 2019 set a target of 9 million tourists by 2025 — a figure that (despite the pandemic) is expected to be reached as early as 2023, prompting the revision of the 2025 target upward to over 11 million. This highlights the necessity of continuously updating scenarios and objectives based on new data and trends. Foresight helps institutionalize this process. For instance, within the framework of strategic foresight, foresight sessions could be held annually or biennially, involving specialists from relevant ministries and agencies, independent experts, and business representatives. These sessions would discuss current trends (such as the geography of tourist flows, tourists' purchasing power, and the impact of new technologies like e-visas and online booking platforms), leading to the development of 2–3 possible scenario models for the next 5–10 years. Typically, one scenario would be inertial (assuming no major changes), another would reflect a shock (crisis or emergency) scenario, and a third would be optimistic (assuming full implementation of proactive strategies). This approach allows not only for the adjustment of targets in line with sectoral conditions but also for the early identification of potential risks and the preparation of preventive measures. For example, if a decline is detected in a specific foreign market (such as a drop in tourist flows from a particular country), compensatory steps can be taken in time by exploring and promoting other markets. Alternatively, under a global economic instability scenario, emphasis can be placed on supporting and stimulating domestic tourism to mitigate foreign currency revenue losses. Preparing such measures in advance is one of the core benefits of foresight. Another crucial point in this discussion is the importance of ensuring sustainability and innovation in tourism. Foresight activities should consider not only economic indicators but also the ecological and social impacts of tourism. For example, if tourist flows are poorly managed, they may damage cultural or natural heritage sites in certain regions. Anticipating such scenarios, foresight processes should include plans for "green tourism" (ecotourism) and measures to preserve cultural heritage. In this regard, international organizations like UNWTO recommend linking future tourism planning with the Sustainable


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Development Goals (SDGs). Notably, the UN's 2030 Sustainable Development Agenda places special emphasis on tourism's role in reducing poverty, preserving cultural heritage, and increasing women's employment. Foresight analysis should therefore also incorporate these sustainability objectives and the related achievement indicators. In summary, it can be concluded that the time has come to elevate Uzbekistan's strategic tourism planning process to a new level by institutionally introducing foresight technologies. It is no coincidence that, through initiatives by the Ministry of Innovative Development, foresight centers are being established at several universities in the country — these centers are expected to conduct future-oriented analyses across various sectors. Going forward, similar analytical groups and expert networks should be formed in the tourism and service sectors and actively engaged in informing government decision-making.

# Conclusion and Recommendations

Based on the findings of this study, the following conclusions were drawn:

The Need for Strategic Tourism Development in Uzbekistan:

The sector has demonstrated rapid growth in recent years, progressively becoming a key pillar of the national economy. To achieve ambitious targets (for example, 10–15 million tourists by 2030), it is essential to implement scientifically grounded planning. Foresight technologies are increasingly seen as a tool to enhance the quality and effectiveness of strategic planning.

The Essence and Importance of Foresight Technologies:

Foresight is a set of methods aimed at anticipating and shaping the future. It enables the systematic analysis of external environmental factors (political, economic, social, technological trends) that impact tourism and facilitates the development of multiple potential development scenarios. Unlike simple trend extrapolation, foresight forecasting accounts for several possible interpretations of the future, thereby creating opportunities to minimize risks and fully leverage potential.

Current State and Future Trends of Uzbekistan's Tourism Market:

Analyses show that Uzbekistan's tourism sector grew significantly between 2017–2019, followed by a temporary decline during the 2020 pandemic (with a –77% drop in tourist flows). Recovery began in 2021, with indicators fully rebounding by 2022 (5.2 million tourists, $1.6 billion in exports). Growth continued in 2023, with 7–10 million foreign visitors recorded. These trends indicate that government measures (visa liberalization, infrastructure projects, marketing) have been effective. However, competing countries (such as Kazakhstan) are also focusing heavily on tourism, intensifying regional competition. Thus, strengthening Uzbekistan's position in existing markets and expanding into new ones will be crucial.

Possible Development Scenarios up to 2030:

This study proposed three potential scenarios for tourism development — pessimistic (if new pandemics or crises occur, ~10 million tourists by 2030), baseline inertial (if current growth rates are maintained, ~12 million tourists), and optimistic (if accelerated growth is achieved, ~14 million tourists). These calculations highlight the need for "flexibility" in strategic planning. If the optimistic scenario is realized, Uzbekistan's emergence as a regional tourism hub will accelerate, and total tourism revenues could double. In contrast, under a pessimistic scenario, growth will continue at a slower pace, potentially leaving the country behind in achieving its major goals. Therefore, scenario analyses should be incorporated into planning, using the principle of "if this happens, we will take that action."

Recommendations for Implementing Foresight:

It is proposed to integrate foresight instruments into the strategic planning and management system of tourism, including:

Institutional Level: Establish a permanent Foresight and Research Unit or Expert Council under the Ministry of Tourism and Cultural Heritage to monitor regional and global trends and regularly present analytical results. Data Expansion: Improve tourism statistics and market research; conduct regular surveys on tourists' needs and preferences to create a critical information base for anticipating future trends. Scenario Analysis and Planning: Establish an annual practice of updating 3–5-year and 10–15-year tourism development scenarios, involving academic and private sector representatives (via public-private partnerships). For example, hold an annual expert meeting titled "The Future Year of Tourism — Scenarios." Innovation and Digital Technologies: Utilize big data and AI in foresight analysis (for automated analysis of monitoring data and linking travel trends to management decisions). For example, update demand forecasts by analyzing data from online search and booking services.Human Capacity Development: Train specialists in tourism management and marketing with expertise in foresight and strategic planning; incorporate these topics into higher education programs and professional development courses. International Cooperation: Develop Uzbekistan's tourism foresight in collaboration with

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UNWTO and other international organizations, involving foreign experts. Participate in international “Tourism Futures” projects and conduct joint research on the future of regional tourism with other Central Asian countries. In summary, applying foresight technologies in the strategic development of tourism in Uzbekistan enhances the quality and soundness of sector leadership and investment decisions. Through foresight, the country gains the ability to fully realize its tourism potential, quickly adapt to external changes, and maintain competitiveness. Ultimately, this contributes to achieving the overarching goal of transforming Uzbekistan into one of the leading international tourism hubs.

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