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TOURISM RESOURCE EFFICIENCY AND SUSTAINABLE REGIONAL SERVICE SECTOR DEVELOPMENT: AN EMPIRICAL ASSESSMENT OF UZBEKISTAN

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Abstract: The effective utilization of tourism resources is increasingly important for countries seeking to transform tourism growth into sustainable regional service-sector development. This study empirically assesses tourism resource efficiency in Uzbekistan and examines its implications for the development of regional services. The analysis is based primarily on official data from the National Statistics Committee of the Republic of Uzbekistan, including foreign tourist trips, tourism service exports, market services, and accommodation and food services for 2021–2025. Tourism Resource Efficiency (TRE) is measured as tourism service export revenue generated per foreign tourist trip. The results indicate that the number of foreign tourist trips increased from 1.881 million in 2021 to 11.680 million in 2025, while tourism service exports increased from USD 422.1 million to USD 4.880 billion. Consequently, export revenue per foreign tourist trip increased from approximately USD 224 to USD 418. During the same period, the volume of market services increased from UZS 389.4 trillion to UZS 1,050.3 trillion. The study also develops a baseline forecast for 2026–2030. Under a continuation of the observed medium-term trend, foreign tourist trips may reach approximately 22.3 million and tourism service exports approximately USD 10.1 billion by 2030. The corresponding implied tourism resource efficiency is projected at approximately USD 453 per tourist trip. Based on the empirical findings, a Tourism Resource Efficiency–Regional Service Development Model is proposed, linking tourism resources, utilization efficiency, tourism value creation, service-sector spillovers and sustainable regional development. The study concludes that Uzbekistan should gradually shift from tourism policies focused mainly on increasing visitor numbers toward policies focused on increasing value created per visitor, regional service integration, resource productivity and sustainability.

Keywords: tourism resource efficiency, tourism services, regional development, service sector, tourism exports, sustainable tourism, tourism forecasting, Uzbekistan.

Аннотация: Эффективное использование туристских ресурсов приобретает все большее значение для стран, стремящихся трансформировать рост туризма в устойчивое развитие регионального сектора услуг. В данном исследовании эмпирически оценивается эффективность использования туристских ресурсов в Узбекистане и рассматривается ее влияние на развитие региональных услуг. Анализ в основном основан на официальных данных Национального комитета Республики Узбекистан по статистике, включая данные о поездках иностранных туристов, экспорте туристских услуг, рыночных услугах, а также услугах по проживанию и питанию за 2021–2025 годы. Эффективность использования туристских ресурсов (TRE) измеряется как объем доходов от экспорта туристских услуг, приходящийся на одну поездку иностранного туриста. Результаты показывают, что количество поездок иностранных туристов увеличилось с 1,881 млн в 2021 году до 11,680 млн в 2025 году, тогда как экспорт туристских услуг вырос с 422,1 млн долларов США до 4,880 млрд долларов США. В результате доход от экспорта на одну поездку иностранного туриста увеличился примерно с 224 до 418 долларов США. За тот же период объем рыночных услуг увеличился с 389,4 трлн сумов до 1 050,3 трлн сумов. В исследовании также разработан базовый прогноз на 2026–2030 годы. При сохранении наблюдаемой среднесрочной тенденции количество поездок

иностранных туристов к 2030 году может достичь примерно 22,3 млн, а экспорт туристских услуг — около 10,1 млрд долларов США. Соответствующая расчетная эффективность использования туристских ресурсов прогнозируется на уровне примерно 453 долларов США на одну туристскую поездку. На основе эмпирических результатов предложена модель эффективности использования туристских ресурсов и развития регионального сектора услуг, связывающая туристские ресурсы, эффективность их использования, создание туристской стоимости, межотраслевые эффекты в секторе услуг и устойчивое региональное развитие. В исследовании делается вывод о необходимости постепенного перехода Узбекистана от туристской политики, ориентированной преимущественно на увеличение числа посетителей, к политике, направленной на повышение создаваемой стоимости на одного посетителя, интеграцию региональных услуг, повышение производительности ресурсов и обеспечение устойчивости.

Ключевые слова: эффективность использования туристских ресурсов, туристские услуги, региональное развитие, сектор услуг, экспорт туристских услуг, устойчивый туризм, прогнозирование туризма, Узбекистан.

INTRODUCTION

Tourism resources constitute an important component of regional economic potential. Natural landscapes, cultural heritage, historical monuments, gastronomy, traditions, events and human capital can generate economic value only when they are effectively integrated into tourism and service-sector value chains.

The existence of tourism resources alone therefore does not guarantee high regional economic performance. Two destinations with similar cultural or natural resources may produce substantially different economic outcomes depending on accessibility, accommodation capacity, transportation, service quality, destination management, investment, entrepreneurship and the ability to convert tourist demand into local income.

This distinction has become increasingly important in sustainable tourism research. The United Nations Environment Programme notes that tourism simultaneously creates economic opportunities and places pressure on energy, water, land and other resources. It therefore argues that tourism development needs to improve resource efficiency while reducing environmental impacts [1]. UNEP specifically emphasizes the importance of “resource efficiency” [1] as part of sustainable tourism development. Tourism efficiency should consequently be evaluated not only through visitor numbers but also through the economic value generated from available tourism resources. This issue is particularly relevant for Uzbekistan.

The country possesses globally recognized cultural and historical destinations such as Samarkand, Bukhara and Khiva, as well as ecological, mountain, desert, gastronomic, pilgrimage and rural tourism resources across its regions. At the same time, Uzbekistan has experienced exceptionally rapid growth in international tourism. According to the National Statistics Committee of the Republic of Uzbekistan, the number of foreign tourist trips increased from 1.8813 million in 2021 to 11.6796 million in 2025 [2]. The official methodology specifies that “the same person entering the republic may be counted multiple times” [2]; therefore, the indicator represents tourist trips rather than unique tourists. Tourism service exports expanded even more substantially. Official SIAT data show that exports classified as trips (tourism) increased from USD 422.1 million in 2021 to USD 4.8803 billion in 2025.

These developments raise an important economic question:

Is Uzbekistan merely receiving more tourists, or is the country also becoming more efficient in transforming tourism demand into service-sector value? This research addresses this question by introducing a simple and transparent Tourism Resource Efficiency indicator and connecting its dynamics to service-sector development. The aim of the article is to assess tourism resource efficiency in Uzbekistan and determine its role in supporting sustainable regional service-sector development.

The following research objectives are formulated:

- to analyze changes in foreign tourist flows in Uzbekistan during 2021–2025;
- to assess changes in tourism service export performance;
- to calculate tourism resource efficiency in terms of export revenue generated per foreign tourist trip;
- to examine the relationship between tourism expansion and service-sector development;
- to forecast tourism demand and tourism service exports for 2026–2030;
- to develop a conceptual model linking tourism-resource efficiency with sustainable regional service-sector development.

The scientific novelty of the study is the interpretation of tourism resource efficiency as the capacity of a destination economy to transform tourist flows and available tourism resources into measurable service export value and subsequent regional service-sector effects.

REVIEW OF LITERATURE ON THE SUBJECT

The concept of tourism efficiency has become increasingly important as tourism studies have shifted from quantitative expansion toward quality, productivity and sustainability.

Traditional tourism-development strategies often prioritize growth in arrivals, overnight stays and tourism revenues. However, recent studies increasingly emphasize the relationship between resource inputs and economic, social and environmental outputs. Guo and Cao, “using a Data Envelopment Analysis approach, demonstrate that tourism destinations can differ significantly in their ability to transform tourism inputs into outputs”¹. Their study confirms that tourism development scale and tourism efficiency should not be treated as identical concepts. The implication is important for Uzbekistan. Increasing the number of tourists does not automatically mean that tourism resources are being used efficiently. Efficiency depends on how successfully destinations transform tourism potential into higher-value services, business revenues, employment and regional income.

The literature has increasingly incorporated ecological considerations into tourism-efficiency assessment. Deng and Chen argue that “improving tourism ecological efficiency is important for achieving coordination between tourism development and environmental sustainability”². Their analysis identifies economic development, digital economy, transportation infrastructure, technological innovation and energy consumption as important determinants of regional tourism efficiency. Wang, An and Chen similarly find that “tourism eco-efficiency is affected by tourism resource endowment, tourism investment, economic development, industrial concentration and information development”³. Their analysis also demonstrates that tourism efficiency has spatial spillover effects across neighboring destinations. This spatial dimension is highly relevant to Uzbekistan because tourist destinations do not operate independently. Development in Samarkand can generate demand for transport, gastronomy, handicrafts, rural tourism and other services in neighboring districts and regions.

Another stream of literature examines the relationship between tourism efficiency and regional economic outcomes. Wang, Tang and Guo identify “tourism eco-efficiency as an important factor associated with regional economic development and demonstrate that tourism-related efficiency may produce spatial interactions between territories”⁴. Similarly, research on global tourism destinations shows that “sustainable tourism efficiency requires simultaneous consideration of economic, environmental and social outcomes”⁵. These findings suggest that tourism-resource efficiency cannot be assessed purely as a tourism-industry variable. Its effects extend to the wider service economy.

Wu emphasizes the role of environmental regulation in improving tourism eco-efficiency and argues that “the interaction between tourism development and environmental policy is central to sustainable tourism development”⁶. More recent research concludes that technological progress, environmental regulation, tourism-industry structure and infrastructure development are major determinants of tourism eco-efficiency. These studies are relevant because improvements in tourism resource efficiency in Uzbekistan cannot depend solely on exploiting additional tourism assets. Higher efficiency should instead result from better transportation, digitalization, service quality, human capital and management.

Most existing tourism-efficiency studies apply relatively complex methods such as DEA, Super-SBM models, Malmquist indices or spatial econometric models. These methods are useful when long regional panel datasets containing capital, labor, energy, environmental and tourism-output variables are available.

However, the availability of comparable regional environmental-tourism datasets remains limited in Uzbekistan. At the same time, reliable official statistics are available for foreign tourist trips and tourism service exports. This creates an opportunity for a transparent value-based measure of tourism resource efficiency. Therefore, this paper assesses the capacity of Uzbekistan’s tourism economy to transform international tourist trips into tourism service export revenues.

- 1 Guo, Y., & Cao, Z. (2024). A study on the tourism efficiency of tourism destination based on DEA model: A case of ten cities in Shaanxi province. *PLOS ONE*, 19
- 2 Deng, G., & Chen, H.H. (2024). The Spatiotemporal Characteristics and Driving Factors of Regional Ecological Efficiency in the Tourism Sector. *Sustainability*, 16(3), 982
- 3 Wang, Y., An, L., & Chen, H. (2024). Spillover effects and influencing factors of tourism eco-efficiency for sustainable development: A case study of cities in the Yangtze River Delta. *Sustainable Development*, 32(6), 6201–6214.
- 4 Wang, Q., Tang, Q., & Guo, Y. (2024). Spatial Interaction Spillover Effect of Tourism Eco-Efficiency and Economic Development. *Sustainability*, 16(18), 8012.
- 5 Nguyen, D.T., Kuo, K.C., Lu, W.M., & Nhan, D.T. (2024). How Sustainable Are Tourist Destinations Worldwide? An Environmental, Economic, and Social Analysis. *International Journal of Hospitality Management-related research*.
- 6 Wu, X. (2023). Tourism development level and tourism eco-efficiency: Exploring the role of environmental regulations in sustainable development. *Sustainable Development*.

RESEARCH METHODOLOGY

The empirical analysis primarily uses information published by the National Statistics Committee of the Republic of Uzbekistan.

Four groups of indicators were selected:

- number of foreign tourist trips;
- export of tourism services;
- volume of market services;
- accommodation and food services.

The National Statistics Committee was selected as the principal source because it is the official national institution responsible for collecting and publishing statistical information. The tourism export dataset is drawn from the Statistical Agency's SIAT database. The dataset was updated in July 2026 and contains annual tourism service export data through 2025. The tourist-flow dataset provides a methodologically consistent series for 2021–2025. For additional verification, official information from the Tourism Committee of the Republic of Uzbekistan is used.

In this study, tourism-resource efficiency is interpreted as the ability of the tourism system to generate external service value from international tourist demand.

The indicator is calculated as follows:

$$TRE_t = \frac{TSE_t}{FT_t}$$

where:

TRE_t – Tourism Resource Efficiency in year t, measured in US dollars per foreign tourist trip;

TSE_t – tourism service exports in year t, million US dollars;

FT_t – number of foreign tourist trips in year t, million trips.

A higher TRE value indicates that the tourism economy generates more export revenue per foreign tourist trip.

The indicator should not be interpreted as a complete measure of environmental efficiency. Rather, it represents the economic utilization efficiency of tourism demand and resources.

ANALYSIS AND RESULTS

Table 1 presents the principal tourism indicators for 2021–2025 (Table 1).

Table 1
Tourism growth and resource-efficiency indicators in Uzbekistan⁷

Year	Foreign tourist trips, million	Tourism service exports, USD million	Tourism Resource Efficiency, USD/trip
2021	1.881	442.1	224.4
2022	5.233	1,609.8	307.6
2023	6.626	2,143.1	323.4
2024	7.957	3,519.0	442.2
2025	11.680	4,880.3	417.8

The results reveal three important tendencies. First, international tourism demand expanded rapidly. Foreign tourist trips increased from approximately 1.9 million in 2021 to almost 11.7 million in 2025. This means that the number of foreign tourist trips increased more than sixfold within four years. Second, tourism service exports increased even faster in monetary terms. Tourism-related service exports expanded from USD 422.1 million to USD 4.8803 billion. Third, the economic value generated per tourist trip also increased. Tourism Resource Efficiency rose from USD 224.4 per trip in 2021 to USD 417.8 in 2025. This represents an increase of approximately 86%. The result is significant because it indicates that tourism growth in Uzbekistan has not been driven exclusively by higher visitor volumes. The tourism economy has also improved its capacity to generate export revenue per international tourist trip.

⁷ Authors' calculations based on National Statistics Committee of the Republic of Uzbekistan, SIAT database

The TRE indicator reached its highest observed value in 2024 at approximately USD 442 per trip. In 2025, the indicator declined moderately to approximately USD 418 per trip, despite strong growth in total tourism exports. This does not necessarily indicate structural deterioration. Tourist arrivals increased by 46.8% in 2025, while tourism service exports also increased substantially. Official tourism statistics reported 11.6796 million foreign tourist trips in 2025. The Tourism Committee reports that total tourism service exports reached approximately USD 4.8 billion in 2025. The temporary decline in revenue per trip may therefore reflect changes in visitor composition, average length of stay, regional travel patterns or the growing share of short-distance travelers from neighboring countries. This result demonstrates why tourist numbers alone are insufficient to assess tourism development.

Tourism growth produces economic effects beyond hotels and travel agencies.

Visitor expenditure creates demand for:

- accommodation;
- restaurants and cafés;
- passenger transportation;
- retail trade;
- cultural services;
- entertainment;
- financial services;
- communication;
- handicrafts;
- local agricultural products;
- personal and professional services.

The expansion of Uzbekistan's broader service economy has occurred simultaneously with tourism growth (Table 2).

Table 2.
Development of market services in Uzbekistan⁸

Year	Market services, trillion UZS
2021	389.4
2022	509.6
2023	664.8
2024	840.1
2025	1,050.3

The volume of market services therefore increased by approximately 2.7 times between 2021 and 2025. Although this growth cannot be attributed entirely to tourism, the simultaneous expansion of tourism flows, tourism exports and service markets demonstrates an increasingly important interaction between tourism and Uzbekistan's service economy. Accommodation and food services provide a particularly clear connection. In 2025, accommodation and food services reached approximately UZS 227 trillion, representing growth of 10.4% compared with 2024. Regional statistics demonstrate that the economic effects are geographically differentiated. For example, in 2025 accommodation and food service volumes included:

- Tashkent city – UZS 38.7 trillion;
- Samarkand region – UZS 26.0 trillion;
- Namangan region – UZS 23.6 trillion;
- Fergana region – UZS 22.8 trillion;
- Kashkadarya region – UZS 20.0 trillion.

These differences indicate that tourism resources need to be assessed not simply according to their existence but according to their ability to stimulate regional service activity.

Based on the theoretical analysis and empirical results, the study proposes the following conceptual model (Figure 1).

⁸ National Statistics Committee of the Republic of Uzbekistan

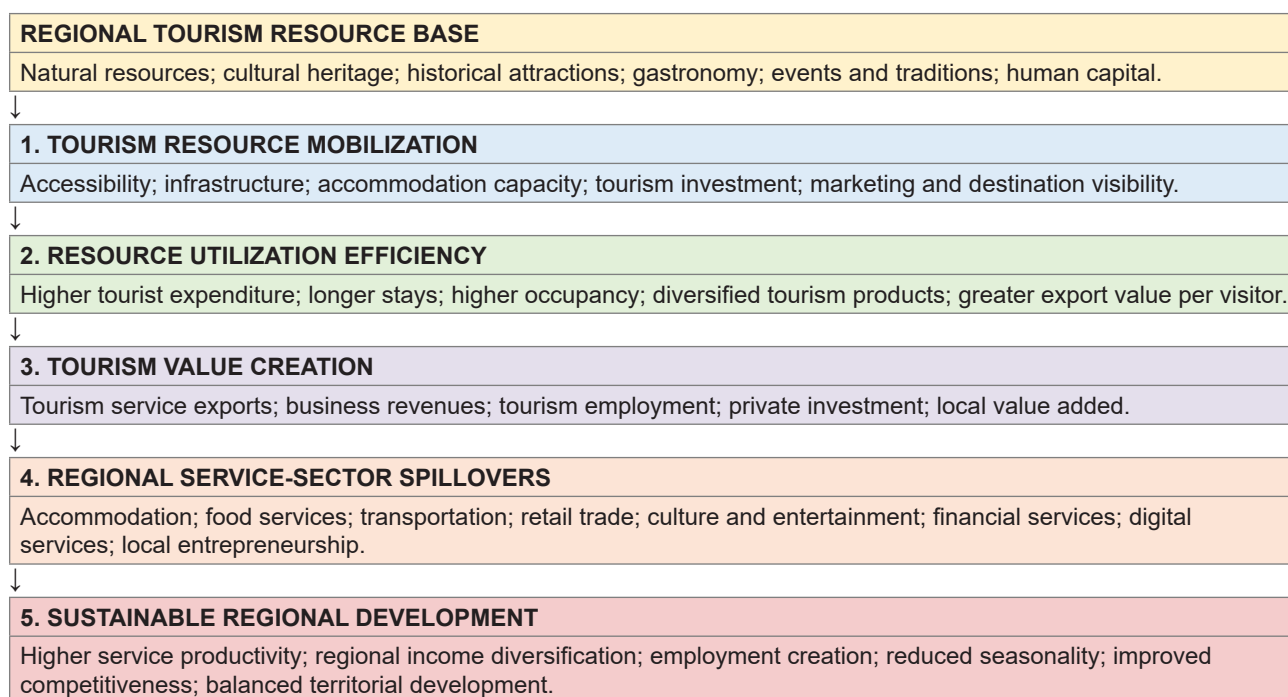


Figure 1. Tourism Resource Efficiency–Regional Service Sector Development Model⁹

Feedback: Resource protection, service quality and sustainability monitoring influence future tourism-resource utilization.

Central proposition: Tourism resources do not directly generate sustainable development; they first have to be converted into tourism value through efficient utilization.

Conceptual logic: Resources → Mobilization → Efficiency → Value Creation → Service Spillovers → Sustainable Regional Development

This distinction highlights a key regional policy implication: the development impact of tourism depends not only on the existence of tourism resources, but on how efficiently those resources are mobilized, converted into value and transmitted across the wider service economy.

To assess the possible future scale of tourism demand and service-export value, baseline linear trend models were estimated using the consistent official 2021–2025 series. Because only five comparable annual observations are available, the forecast is interpreted as a baseline trend scenario, not as a deterministic prediction.

The forecasting period covers 2026–2030 (Table 3).

Table 3.

Baseline forecast of tourism development in Uzbekistan¹⁰

Year	Foreign tourist trips, million	Tourist service exports, USD billion	Implied TRE, USD/trip
2025	11.68	4.88	417.8
2026	13.37	5.76	430.9
2027	15.60	6.85	438.7
2028	17.84	7.93	444.5
2029	20.07	9.01	449.0
2030	22.30	10.09	452.6

The baseline scenario suggests that international tourist trips could exceed 20 million by 2029 and reach approximately 22.3 million by 2030.

Tourism service exports could exceed USD 10 billion by 2030. More importantly, the forecast implies an increase in tourism-resource efficiency from approximately USD 418 per trip in 2025 to approximately USD 453

⁹ Developed by the authors

¹⁰ Authors' calculations based on National Statistics Committee data for 2021–2025

per trip in 2030. This distinction is important. If Uzbekistan receives 22 million tourists but revenue per tourist stagnates or declines, tourism-resource pressure could increase faster than economic benefits.

In contrast, if the country simultaneously increases visitor expenditure, average stay duration, service quality and local value capture, tourism could create substantially greater regional economic benefits without relying exclusively on ever-higher visitor volumes.

Recent 2026 data provide useful early evidence. According to the Tourism Committee, Uzbekistan received 7,749,307 foreign tourists during January–July 2026, representing a 22.6% increase compared with the same period in 2025. The Tourism Committee also reported tourism service exports of approximately USD 3.9 billion during the same period. This would correspond to approximately USD 503 of tourism-service export value per recorded foreign tourist during the seven-month period.

CONCLUSIONS AND SUGGESTIONS

This study assessed tourism-resource efficiency and its relationship with sustainable regional service-sector development in Uzbekistan. The empirical results demonstrate significant structural changes in the country's tourism economy.

Between 2021 and 2025:

- foreign tourist trips increased from 1.881 million to 11.680 million;
- tourism service exports increased from USD 422.1 million to USD 4.880 billion;
- tourism export value per foreign tourist trip increased from approximately USD 224 to USD 418;
- market services expanded from UZS 389.4 trillion to UZS 1,050.3 trillion.

These results indicate that tourism development in Uzbekistan has involved not only growth in visitor numbers but also substantial growth in economic value creation. The baseline forecast suggests that foreign tourist trips may reach approximately 22.3 million by 2030, while tourism service exports could approach USD 10.1 billion. Under this scenario, tourism-resource efficiency may reach approximately USD 453 per foreign tourist trip. The main theoretical conclusion is that tourism resources should not be regarded as economic outputs themselves.

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