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Foreign Experience in Monitoring Tourist Consumer Behaviour and Stimulating Tourist Flows: A Comparative Analysis of Reforms and Its Applicability to The Tourism Market of Uzbekistan

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Abstract: The article presents a comparative analysis of foreign experience in monitoring tourist consumer behaviour and state reforms aimed at stimulating tourist flows, using the examples of Georgia, Armenia, Azerbaijan, Kazakhstan, the Kyrgyz Republic, the Republic of Tajikistan and the Republic of Belarus. Based on official statistics and legal acts, the paper examines institutional mechanisms for studying consumers together with Uzbekistan's own reform trajectory (Presidential Decrees No. UP-9 and No. UP-87), and formulates recommendations for adapting best practices — primarily Kazakhstan's continuous digital tourist-registration system and Georgia's regular satisfaction-monitoring model — to the Uzbek tourism market.

Keywords: tourist consumer behaviour, tourism reforms, tourist flow, tourism market competitiveness, visa liberalisation, tourism digitalisation, Uzbekistan, comparative analysis.

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1. Introduction

Tourism is currently regarded by the Government of the Republic of Uzbekistan as one of the strategic drivers of economic diversification and job creation. In recent years, the country has adopted a series of systemic decisions aimed at radically increasing the tourist flow: Decree of the President of the Republic of Uzbekistan No. UP-9 of 12 January 2024 "On Measures to Significantly Increase the Flow of Foreign Tourists to the Republic and Further Boost Domestic Tourism" [1] and Decree No. UP-87 of 15 May 2025 "On Measures to Enhance the Role and Importance of Tourism in the Economy through a Radical Increase in Tourist Flow and Accelerated Expansion of Tourism Services in 2025–2026" [2]. The result of this policy has been a marked increase in inbound tourist flow: while Uzbekistan received 6.6 million foreign nationals in 2023, this figure reached 7.96 million (+20.6%) in 2024 [3], and 7.5 million people in January–August 2025 — 49.1% more than in the same period of the previous year [4]. The current benchmark of state policy is to bring the annual tourist flow to 20 million people, raise tourism's share of GDP to 7%, and increase tourism services exports to USD 6 billion [5].

At the same time, quantitative growth in tourist flow alone does not guarantee a sustained increase in the competitiveness of the national tourism product: without a systematic study of consumer behaviour — motives, preferences, satisfaction levels and repeat-visit factors — management decisions rely predominantly on supply-side factors (subsidies, infrastructure, visa regimes) rather than on confirmed demand; the methods and mechanisms of such research as applied to the tourism market were examined by the author previously [6]. As the analysis of foreign experience shows, countries with a more

mature tourism industry — Georgia and Kazakhstan in particular — have institutionalised the regular collection of behavioural data on tourists, and this is accompanied by a more systemic character of the reforms they carry out, although the present study does not aim to rigorously prove a causal relationship between the two processes [7], [8], [9]. This underlies the relevance of the comparative analysis: which political and institutional reforms are being carried out by CIS and regional countries comparable in geographic location and level of development in order to attract tourists, what methods they use to study consumer behaviour, and what of this experience is applicable to the tourism market of Uzbekistan.

The aim of the study is a comparative analysis of foreign experience in state stimulation of tourist flows and the study of tourist consumer behaviour, using the examples of Georgia, Armenia, Azerbaijan, Kazakhstan, the Kyrgyz Republic, the Republic of Tajikistan and the Republic of Belarus, as well as the development, on this basis, of practical recommendations for the tourism market of Uzbekistan. To achieve this aim, the following objectives were set: 1) to systematise official statistical data on the dynamics of tourist flow and the contribution of tourism to the economy of the countries under consideration; 2) to identify the key directions and instruments of tourism reforms applied to attract tourists; 3) to characterise the methods used abroad for studying tourist consumer behaviour; 4) to compare the identified foreign experience with Uzbekistan's current tourism policy and to determine directions for its adaptation.

Comparative tourism research increasingly treats tourist-flow growth and consumer-behaviour monitoring as interdependent policy concerns. In the present manuscript, earlier work on methods and mechanisms for studying tourism consumers provides the conceptual basis for distinguishing between simple arrival statistics and behavioural information on motivation, satisfaction, preferences, and repeat visits [6]. This distinction is important because a destination may record rapid growth in arrivals without possessing an institutional mechanism for explaining why tourists come, how they evaluate services, or what encourages them to return.

The foreign experience reviewed in this study illustrates several institutional approaches. Georgia combines tourism administration with regular visitor research and publicly reported behavioural indicators [8], [10], while Kazakhstan embeds tourist registration within a broader digitalisation agenda through the eQonaq system [9]. Azerbaijan increasingly links tourism development with digital and market-oriented instruments [11], whereas Tajikistan has relied more heavily on externally supported analytical work, including World Bank research based on tour-operator evidence [12]. These differences indicate that tourism competitiveness is shaped not only by visa policy, infrastructure, and promotion, but also by the institutional capacity to generate and use consumer data.

For Uzbekistan, this literature and policy context reveals a practical research gap. Existing reforms strongly emphasise tourist-flow expansion, visa liberalisation, subsidies, infrastructure, and digital platforms [2], [1], while systematic consumer monitoring remains less explicitly institutionalised. Accordingly, the present study extends the discussion from the question of how to increase tourist numbers to the question of how foreign monitoring practices can support evidence-based tourism policy in Uzbekistan. This framing follows the CAJITMF article structure, where the literature synthesis and research gap are developed within the Introduction before the Materials and Methods section.

2. Materials and Methods

The object of the study is state policy for attracting tourists and the institutional mechanisms for studying consumer behaviour in seven CIS and regional countries; the subject is the mechanisms and instruments that ensure growth in tourist flow and an increase in the competitiveness of the national tourism product. The study's information base comprised official legal and regulatory acts (decrees, resolutions, state programmes and tourism development concepts), data from national statistical committees and tourism administrations, as well as materials from international organisations (the World

Bank) and peer-reviewed academic publications. The study employed methods of comparative and systemic analysis, typological grouping of countries by the nature of the reforms carried out, generalisation, and the method of synthesis in formulating recommendations.

It is necessary to note a methodological limitation of the study: the official statistical data used are not always comparable with one another in terms of the period covered (from 2016 to 2026) or the definition of "tourist" applied – different countries and sources use indicators such as "foreign visitors", "international visits", "inbound trips" and "tourists" in the narrow sense (with an overnight stay), which, in the terminology of the World Tourism Organization (UNWTO), are not equivalent to one another. The figures cited in the article are used as indicative measures of the scale and dynamics of tourist flow, rather than as a strictly comparable statistical base for the quantitative ranking of countries.

3. Results

Official statistical data indicate differing dynamics and scale of tourist flows across the countries under consideration (Table 1). The highest growth rates in 2024–2025 are demonstrated by Uzbekistan (+20.6% in 2024, +49.1% for January–August 2025) and Azerbaijan (+25.9% in 2024), whereas in Georgia and Armenia the growth of inbound tourist flow has stabilised at a moderate level following post-crisis recovery. It is notable that in all countries that have set quantitative target benchmarks (Kazakhstan, the Kyrgyz Republic, Belarus, Uzbekistan), the planning horizon is 5–7 years, with tourism's share of gross domestic product serving as a key indicator alongside the absolute number of arrivals.

Table 1. Comparative statistics of tourist flows and target indicators

Country	Tourist flow (foreign visitors, latest published data)	Growth	Tourism's share of GDP (actual → target)	Official target
Uzbekistan	7.96 million (2024) [4]; 7.5 million for Jan.– Aug. 2025 [5]	+20.6% (2024); +49.1% (8 months of 2025)	n/a → 7%	20 million tourists; tourism services exports – USD 6 billion [6]
Georgia	7.4 million international visits, of which 5.1 million tourists (2024) [9]	+4.2% (visits); +9% (tourist trips)	n/a	Positioning as a year-round premium destination [8]
Azerbaijan	2.63 million foreign nationals (2024) [13]	+25.9%	n/a → 8.6% (non-oil sector)	Expansion of the visa-free regime from 28 to 34 countries [12]

Country	Tourist flow (foreign visitors, latest published data)	Growth	Tourism's share of GDP (actual → target)	Official target
Kazakhstan	9.2 million tourists (2023) [17]	n/a	n/a	Top 50 of the WEF Travel & Tourism Competitiveness Index (from 66th place); KZT 6 trillion in gross value added by 2029 [15]
Armenia	1.67 million inbound tourists (2022) [25]	+92% vs. 2021	n/a	2.5 million tourists annually by 2026 [25]
Kyrgyz Republic	n/a (tourism exports of USD 426.4 million, 2016) [19]	n/a	3.9% (2016) → 7% (2030)	+10% tourist flow growth annually until 2030 [18]
Tajikistan	n/a (data based on tour operators) [21]	+30% (2025, estimated) [22]	n/a	Leadership in Central Asian ecotourism by 2030 [20]
Belarus	6.6 million inbound trips (2024) [24]	n/a	1.9% (2022) → 4.5% (2030)	12.5 million inbound trips by 2030 [24]

3.1. Institutional and Policy Reforms for Attracting Tourists: Foreign Experience

Georgia. The Georgian National Tourism Administration (GNTA) is implementing the Tourism Development Strategy until 2025, whose key directions are attracting high-spending tourists, product diversification (mountain, cultural and medical tourism), and positioning the country as a year-round premium destination [7]. A significant measure has been the introduction of the C5 visa for remote workers and "digital nomads", designed for long-term, multiple-entry stays of up to one year, which stimulates not only growth in the number of arrivals but also an increase in length of stay and average tourist spending.

Azerbaijan. The State Tourism Agency, established by presidential decree in 2018 [13], is implementing the State Tourism Development Programme for 2026–2030, which sets a target share of tourism in non-oil GDP of 8.6%. The key instrument for attracting tourists identified is the expansion of the visa-free regime from 28 to 34 countries, the simplification of e-visa procedures (ASAN Visa), and the introduction of a "visa on arrival" [14].

Kazakhstan. The Concept for the Development of the Tourism Industry of the Republic of Kazakhstan for 2023–2029 sets target indicators for employment (up to 800,000 people), gross value added (over KZT 6 trillion), and entry into the top 50 of the World Economic Forum's Travel and Tourism Competitiveness Index (up from its current 66th place). The package of measures includes preferential financing for accommodation facilities, subsidies for tour operators, a "tourism cashback" for domestic tours, a VAT refund system for foreign tourists ("Tax Free"), and expansion of the visa-free regime to 79 countries [9].

Armenia. The Tourism Committee is implementing a single destination brand, "Armenia, The Hidden Track", and a tourism development strategy until 2030; in 2022, inbound tourist flow grew by 92% compared to 2021, with a target of 2.5 million tourists annually by 2026 alongside the creation of 20 tourism clusters [15]. The most radical recent reform has been the introduction, from 1 January to 1 July 2026, of a visa-free regime with 113 countries, including EU member states and the Persian Gulf states [16].

The Kyrgyz Republic and the Republic of Tajikistan. Resolution No. 765 of the Cabinet of Ministers of the Kyrgyz Republic of 18 December 2024 approved the Sustainable Tourism Development Programme for 2025–2030, with target indicators for increasing tourism's share of GDP to 7% and annual tourist flow growth of 10% [17]. In Tajikistan, the Tourism Development Strategy until 2030 is oriented towards positioning the country as the leader in ecotourism in Central Asia [18], while, according to industry sources, tourist flow in 2025 grew by more than 30% [19].

The Republic of Belarus. The State Programme "Hospitable Belarus" for 2021–2025 [20] has been succeeded by the State Programme "Tourism" for 2026–2030, which sets a goal of increasing tourism's share of GDP from 1.9% to 4.5% and inbound trips to 12.5 million per year (up from 6.6 million in 2024), alongside the modernisation of the State Tourism Information System [21].

3.2. Foreign Methods for Studying Tourist Consumer Behaviour

The analysis shows that foreign practice in studying tourism service consumers is developing along three directions. The first is regular survey-based monitoring, institutionalised at the state level: the Georgian National Tourism Administration, together with the National Statistics Office (Geostat), publishes data on visitor satisfaction and behaviour on a quarterly basis — in Q2 2026, 93.1% of respondents rated their trip positively, and 81.8% were repeat visitors [8], [10]. This institutional monitoring is complemented by academic research into consumer behaviour in the digital environment: it has been shown, in particular, that tourists' decisions in Georgia are increasingly mediated by social media content, opening up an additional, non-monetary channel for studying visitor preferences [22]. The second direction is comprehensive digital registration, whereby consumer data is collected not selectively but automatically through mandatory digital registration systems; the most illustrative example is Kazakhstan, where the Concept for the Development of the Tourism Industry provides for 100% coverage of accommodation facilities by the "eQonaq" digital system [9], while commercial agencies (such as BRIF) supplement this data set with periodic studies of consumer trends [23]. The third direction is transactional and donor-funded analytics: in Azerbaijan, marketing policy increasingly relies on data from online booking platforms and artificial intelligence systems [11], whereas in Tajikistan the most detailed source of information on tourists remains a World Bank study based on a survey of tour operators [12], indicating the donor-dependent rather than institutionalised nature of such data in countries with emerging tourism markets.

3.3. Reforms and Tourism Policy in Uzbekistan

Decree No. UP-9 of 12 January 2024 marked the start of a new stage of liberalisation of the industry, while Decree No. UP-87 of 15 May 2025 specified the financial and institutional mechanisms for stimulating tourist flow in 2025–2026 [2], [1]. These include subsidies for promoting accommodation and catering facilities (covering up to 50% of audiovisual advertising costs), support for opening Uzbek cuisine restaurants abroad, subsidies for the construction of modular hotels, the development of medical tourism, and the consolidation of all state tourism electronic platforms into a single national tourism platform as of 1 June 2025. A separate area of reform has been further visa liberalisation: from 1 June 2025, a visa-free regime was introduced for citizens of Bahrain, Qatar and Oman; negotiations are underway on the mutual recognition of internal passports with Russia, Kazakhstan and Azerbaijan; and a visa-free regime for US citizens is planned from January 2026 [2]. As of 2026, citizens of more than 100 countries and territories have simplified (visa-free or e-visa) access to Uzbekistan [24].

The dynamics achieved — tourist flow growth from 6.6 million in 2023 to 7.96 million in 2024 (+20.6%) and to 7.5 million in the first eight months of 2025 (+49.1%) [3], [4] — is

comparable to the highest growth rates among the countries considered. At the same time, the structure of Uzbekistan's tourist flow remains markedly regional: as of the results for January–August 2025, tourists from Kyrgyzstan, Kazakhstan and Tajikistan accounted for more than half of all arrivals, and the dominant purpose of travel — 5.17 million of 7.5 million visits — was visiting relatives rather than tourism in the narrow sense (1.15 million visits) [4]. This points to a structural reserve for growth specifically through the targeted tourism segment, for the development of which it is essential not only to further expand supply (the hotel stock is planned to be increased to 8,250 facilities and 95,000 rooms) but also to systematically study the motivation, preferences and satisfaction of this consumer segment [5].

3.4. Comparative Analysis and Opportunities for Adopting Foreign Experience

Comparing the practices reviewed with Uzbekistan's current policy makes it possible to identify the directions most applicable for further improving the effectiveness of reforms.

4. Discussion

Typologically, the countries under review can be grouped according to the predominant nature of their reforms: (a) countries with digital institutionalisation of consumer registration — Kazakhstan (comprehensive "eQonaq" registration) and, in an emerging form, Uzbekistan itself (unified tourism platform); (b) countries with a visa-and-branding attraction model — Georgia, Armenia, Azerbaijan, where the main instruments remain entry liberalisation and destination positioning, alongside a less developed consumer feedback system; (c) countries with a programme-cyclical model — Belarus and the Kyrgyz Republic, which implement reform through successive medium-term state programmes with quantitative target indicators; (d) countries with a donor-dependent model of tourist research — Tajikistan, where the main source of behavioural data remains research by international organisations rather than its own statistical infrastructure. This typology makes it possible to more precisely determine which specific foreign experience is applicable to the particular stage of development of Uzbekistan's tourism policy.

First, Kazakhstan's experience — the mandatory digital tourist registration system "eQonaq" — represents a model that is highly compatible with the digitalisation already begun in Uzbekistan (the unified national tourism platform launched in June 2025). It should be noted that open sources do not contain published performance indicators for the "eQonaq" system itself (coverage completeness, data quality), so what is being discussed is an architectural solution worthy of adoption rather than an empirically confirmed result. Integrating a function for comprehensive, rather than sample-based, collection of behavioural data (demographic profile, purpose of trip, length of stay, repeat-visit status) into this platform would make it possible to move from periodic reporting to continuous consumer monitoring without additional costs for organising surveys, provided that implementation is accompanied by a separate assessment of the quality and completeness of the data collected.

Second, Georgia's experience — regular, publicly available quarterly statistics on visitor satisfaction and behaviour, produced jointly by the tourism administration and the national statistics service — could be adapted by the State Committee on Statistics and the authorised tourism body of Uzbekistan as a basis for assessing the effectiveness of measures taken under Decrees No. UP-9 and No. UP-87, and for the timely adjustment of promotion policy.

Third, the experience of Armenia and Azerbaijan — a single national destination brand and consistent expansion of visa liberalisation — confirms the direction of visa reform chosen by Uzbekistan; however, the Armenian case also contains a cautionary note: according to independent experts, visa liberalisation alone tends to produce more of an image effect and should be accompanied by advance development of service infrastructure [16], which for Uzbekistan implies the need to synchronise visa measures with improvements in hotel and tourism service quality, as envisaged by Decree No. UP-87.

Fourth, Belarus's experience — building reform through successive five-year state programmes with quantifiable target indicators (share of GDP, number of trips, hotel occupancy) — methodologically corresponds to the approach already adopted by Uzbekistan (a target of 20 million tourists, 7% of GDP, USD 6 billion in exports) and confirms its validity, provided there is regular public reporting on progress towards these indicators.

Finally, the experience of the Kyrgyz Republic and Tajikistan serves as a warning of a different kind: in countries where systematic tourist research is conducted primarily through donor-funded studies (the World Bank, international development organisations) rather than their own state statistical infrastructure, a gap is observed between stated target indicators and the actual ability to verify them. Uzbekistan, which already has its own State Committee on Statistics and regularly publishes data on tourist flow [25], [3], [4], should avoid such a gap by assigning the authorised body the function of regular study of tourist consumer behaviour, methodologically comparable with international practice (UNWTO), rather than merely quantitative arrival counting.

5. Conclusion

The comparative analysis conducted shows that Uzbekistan's tourism policy, in terms of the growth rate of tourist flow and the scale of the stimulus measures adopted (visa liberalisation, subsidies, digitalisation), is comparable to the most dynamically reforming countries in the region — Azerbaijan and Kazakhstan — but lags behind them and Georgia in the degree of institutionalisation of systematic research into tourist consumer behaviour. The current Decrees No. UP-9 and No. UP-87 have created a substantial supply-side foundation (infrastructure, subsidies, visa regimes) but do not contain a separate mechanism for the regular study of consumer motivation, satisfaction and behaviour, methodologically comparable to foreign counterparts.

Drawing on the comparative analysis conducted in Section 3.5, the following practical recommendations are formulated: 1) integrate into Uzbekistan's unified national tourism platform a function for comprehensive digital tourist registration (following the example of Kazakhstan's "eQonaq"), with a separate assessment of the completeness and quality of the data collected; 2) organise, on the basis of the State Committee on Statistics and the authorised tourism body, regular quarterly public monitoring of visitor satisfaction and behaviour using a methodology comparable to Georgia's GNTA–Geostat model; 3) synchronise further visa liberalisation with accelerated investment in service quality; 4) formalise the target indicators already achieved (20 million tourists, 7% of GDP, USD 6 billion in exports) in the format of successive medium-term programmes with open public reporting; 5) pay particular attention to developing the targeted tourism segment not related to visiting relatives, whose share in the structure of inbound flow remains comparatively small. Implementing these recommendations will make it possible to shift Uzbekistan's state policy for attracting tourists from a predominantly supply-driven model to one based on verifiable data on consumer behaviour, in line with the best foreign practice of the countries examined.

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