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Current State and Development Opportunities of The Tourism Sector in The Republic of Karakalpakstan: An Analytical Assessment

B. I. Mammetova*¹

1. Independent Researcher at The Tourism Development Research Institute, Head of The Department for Labour Market Analysis and Coordination of Non-State Educational Institutions

*Correspondance: barno.mammetova8@gmail.com

Abstract: The article analyses the current state and development opportunities of the tourism sector in the Republic of Karakalpakstan – Uzbekistan’s largest but least tourism-intensive region. Using official statistics of the National Statistics Committee for 2024, data of the regional tourism authority, 2025–2026 target indicators and regulatory documents, the study applies comparative regional analysis, capacity-intensity indicators, target-gap and scenario analysis, and SWOT analysis. The results show that despite rapid growth of flows (200.7 thousand foreign and over 2 million domestic tourists in 2024), the region’s tourism economy remains structurally weak: it accounts for about 2% of the country’s hotel beds, its hotel beds are used less intensively than the national average, and only a small share of visitors is captured by collective accommodation, which indicates the excursion-dominated character of demand and value leakage to neighbouring Khorezm. The article substantiates a “Nukus hub – thematic spokes” spatial model, a portfolio of priority tourism products and a set of measures to convert growing flows into regional income.

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1. Introduction

Worldwide, tourism has entered a phase of stable post-pandemic recovery: according to UN Tourism, international travel grew by about 5% in January–September 2025, while Uzbekistan was among the top seven countries in the world by growth of international arrivals, exceeding its 2019 level by 73%. The number of foreign tourists visiting Uzbekistan rose from 6.6 million in 2023 to more than 10 million in 2024 and 11.7 million in 2025. In this context, the key challenge for national tourism policy is shifting from aggregate growth to a more balanced spatial distribution of flows, so that peripheral regions, and not only the classic Samarkand–Bukhara–Khiva triangle, benefit from tourism. The Republic of Karakalpakstan occupies a special place in this task. It covers more than one-third of the national territory and possesses unique assets of global significance: the Aral Sea crisis landscape and the Muynak ship cemetery, the desert fortresses of Ancient Khorezm, the Mizdakhan necropolis, the Ustyurt plateau and the I.V. Savitsky State Museum of Art in Nukus. At the same time, the region has historically lagged behind in economic development. Eight years ago its economy ranked last in the country in per capita terms, while it has now risen to seventh place; in 2025 the gross

regional product amounted to 54.3 trillion soums, and the target is to nearly double it within five years. At a meeting on the region's development on 20 February 2026, the President of the Republic of Uzbekistan set the task of turning tourism into one of the main drivers of the region's development and of attracting 500 thousand foreign and 3 million domestic tourists in 2026.[1][2]

The state policy framework for the sector is formed by the Law "On Tourism", the Development Strategy of New Uzbekistan for 2022–2026 and the "Uzbekistan – 2030" Strategy, updated in February 2026. Region-specific measures were adopted by Cabinet of Ministers Resolution No. 545 on developing the tourism potential of Karakalpakstan in 2022–2026, while Resolution PQ-135 and Decrees PF-9 and PF-102 introduced target indicators for each region, marketing obligations and specific incentives, including preferential import terms for off-road vehicles of tour operators registered in Karakalpakstan. Despite this attention, the scientific literature on Karakalpakstan is dominated by descriptive inventories of attractions, while quantitative assessment of the region's tourism economy – its capacity, efficiency and ability to retain tourist spending – remains insufficient. This determines the relevance of the present study. The aim of the study is to assess the current state of the tourism sector in the Republic of Karakalpakstan on the basis of official statistics and to substantiate priority directions for its development. The objectives are: (1) to systematise the region's tourism resource base; (2) to analyse the dynamics of tourist flows and the capacity of the tourism industry in comparison with other regions; (3) to evaluate the gap between current indicators and the 2026 targets; (4) to identify strengths, weaknesses, opportunities and threats; and (5) to propose a spatial development model and a set of practical measures.[3][4]

The theoretical basis of regional tourism analysis is the tourism area life cycle model of R. Butler, according to which a destination passes through the stages of exploration, involvement, development, consolidation and stagnation, and the management tasks differ at each stage. The observed indicators of Karakalpakstan – a small but rapidly growing number of arrivals, emerging local entrepreneurship and active state intervention – correspond to the transition from the "involvement" to the "development" stage, when decisions on infrastructure and product structure largely determine the future trajectory of the destination.

The concept of destination competitiveness was developed by G. Crouch and J.R.B. Ritchie, who linked it to the ability of a destination to increase tourist spending while ensuring the well-being of residents and preserving natural capital. Their model distinguishes core resources and attractors, supporting factors (infrastructure, accessibility, hospitality), destination management and qualifying determinants such as location and safety. L. Dwyer and C. Kim supplemented this approach with a system of measurable indicators and emphasised the role of demand conditions and situational factors. D. Buhalis showed that for peripheral destinations the decisive factors are accessibility, the formation of complex tourism products (the "6A" – attractions, accessibility, amenities, available packages, activities, ancillary services) and coordinated destination marketing.[5]

Given the specifics of the Aral Sea region, the literature on dark tourism is particularly relevant. J. Lennon and M. Foley introduced the term to describe travel to sites associated with death, disaster and tragedy, and P. Stone proposed a "dark tourism spectrum" ranging from entertainment-oriented to education-oriented sites. The Aral Sea is one of the largest human-induced environmental catastrophes of the twentieth century; consequently, Muynak can be positioned as an educational and memorial site of environmental awareness, rather than a site of "disaster voyeurism". At the same time, R. Scheyvens emphasised that ecotourism in vulnerable regions must empower local communities economically, psychologically, socially and politically; otherwise the benefits are captured by external operators.[6]

Methodologically, correct measurement of tourism at regional level is based on the International Recommendations for Tourism Statistics (IRTS 2008), which distinguish

tourists (overnight visitors) from same-day visitors (excursionists). This distinction is crucial for Karakalpakstan, where a significant share of foreign visitors arrive on day trips from Khiva. The review shows a research gap: there is no integrated assessment linking the region's tourism flows with the capacity and efficiency of its tourism industry and with official targets. The present article addresses this gap. The tourism potential of a peripheral region is understood as the totality of natural, historical-cultural, infrastructural and institutional resources that can be converted into tourist products, together with the region's capacity to retain tourist spending within its territory. The second component – the ability to retain spending – is what distinguishes realised potential from nominal potential.[7]

2. Materials and Method

The information base of the study includes: the press release of the National Statistics Committee of the Republic of Uzbekistan on the development of tourism and recreation for 2024, which contains regional data on travel companies and collective accommodation facilities; the 2024 results published by the tourism authority of the Republic of Karakalpakstan; data for January–July 2025 and the 2025 plan; the 2026 target indicators; and the regulatory documents listed above. The following methods were applied: (1) comparative regional analysis of Karakalpakstan against the leading tourist regions (Samarkand, Bukhara, Khorezm) and the national average; (2) capacity-intensity indicators – the number of guests accommodated per bed per year as a proxy for the intensity of capacity utilisation, tours sold per travel company, and the density of hotel beds per 1,000 km²; (3) the capture ratio – the share of the total visitor flow accommodated in collective accommodation facilities, which is used as an indicator of the region's ability to retain overnight spending; (4) target-gap and scenario analysis of the accommodation capacity required to reach the 2026 target; and (5) SWOT analysis, with the results used to formulate strategic directions.[8]

The guest-per-bed indicator is calculated as $I = N / B$, where N is the number of persons accommodated during the year and B is the number of beds. The capture ratio is calculated as $K = N_c / (V_f + V_d) \times 100\%$, where N_c is the number of persons accommodated in all types of collective accommodation facilities, and V_f and V_d are the numbers of foreign and domestic visitors, respectively. A limitation of the study is that regional visitor counts and accommodation statistics come from different sources and are collected using different methodologies; the results are therefore interpreted as indicative orders of magnitude rather than precise estimates.[9]

3. Results

According to the regional tourism authority, Karakalpakstan has 94 cultural heritage sites, 35 pilgrimage sites, 12 museums and 3 theatres. Table 1 systematises the resource base by type of tourism.

Table 1. Tourism resource base of the Republic of Karakalpakstan by type of tourism

Type of tourism	Key resources and sites	Current status
Cultural and museum	I.V. Savitsky State Museum of Art (Nukus), State Museum of History and Culture, Berdakh Museum; 12 museums in total	Savitsky Museum is the region's main international attraction
Archaeological	Desert fortresses of Ancient Khorezm (Ellikkala district): Ayaz-Kala, Toprak-Kala and others	Visited mainly on day trips from Khiva
Pilgrimage	Mizdakhan necropolis, Chilpik; 35 pilgrimage sites in total	Local festival "Mizdakhan" launched

Dark and ecological (Aral Sea)	Muynak ship cemetery, Aral Sea museum, Aralkum desert, former seabed	Stihia festival (over 5,000 guests in 2024); museum modernisation planned
Adventure and nature	Ustyurt plateau canyons, Barsakelmes salt flats, Lower Amudarya Biosphere Reserve, Karateren lake	Tourist-recreation zone at Barsakelmes and glamping zones planned; Karateren complex opened
Event and ethnographic	Karakalpak yurt, crafts, music, cuisine; Ok Kush complex with a record-size yurt	Ethno-festivals, Muynak rally, "Sahro sadosi" festival

The resource base is exceptionally diverse and, importantly, unique on a global scale: the combination of an art collection of international standing, ancient fortresses and the Aral Sea landscape cannot be replicated by competing destinations. According to foreign tour operators who took part in the Destination Karakalpakstan – 2026 forum, it is precisely the desert landscapes, the history of the Aral Sea and the Savitsky Museum that attract international visitors. From the standpoint of the Crouch–Ritchie model, the region is therefore rich in core resources and attractors, while its constraints lie in supporting factors and destination management.[10]

Since 2022, a region-specific system of state support for tourism has been formed in Karakalpakstan. Its main elements are summarised in Table 2.

Table 2. Key regulatory measures for tourism development in the Republic of Karakalpakstan

Document	Key provisions relevant to Karakalpakstan
CM Resolution No. 545 of 28.09.2022	Measures for 2022–2026; presenting Aral Sea region problems and ongoing work to the world community; attracting grants and investors; creating the "Aral Sea goodwill ambassadors" international dialogue platform and holding an international conference in Muynak; tree and saxaul planting by visitors within the "Green Space" project
PQ-135 of 26.04.2023	Target indicators of tourism development approved for each tourist region, including Karakalpakstan
PF-9 of 12.01.2024	Regional target indicators for 2024; monthly "open dialogue" meetings of regional leaders with tourism entrepreneurs
PF-102 of 18.07.2024	From 2025, at least 1 billion soums annually from local budgets for participation in international tourism fairs; for tour operators registered in Karakalpakstan, customs duty and recycling fee on imported off-road vehicles (engine ≥ 2.4 l) payable at 25% of the rate in instalments over 3 years, subject to use within the region
Presidential meeting of 20.02.2026	Tourism defined as a main driver of regional development; Barsakelmes tourist-recreation zone, glamping zones on the Aral Sea region and Ustyurt, modernisation of the Aral Sea history museum; targets of 500 thousand foreign and 3 million domestic tourists in 2026; additional incentives for well-known tour operators

The framework is comprehensive in terms of goals and incentives. However, most measures are aimed at increasing arrivals and promotion, while instruments for retaining tourist spending in the region (support for local accommodation, multi-day product

development, quality standards) are less developed. This conclusion is tested quantitatively below.[11]

Table 3 summarises the main indicators of tourism in the region in 2024.

Table 3. Main indicators of the tourism sector of the Republic of Karakalpakstan, 2024

Indicator	Value
Foreign tourists, thousand persons	200.7
Domestic tourists (citizens of Uzbekistan), million persons	over 2
Organised domestic tourist trips, thousand	240
Tour operators / travel agencies (regional register), units	67 / 13
Accommodation facilities (regional register), units	112
of which: hotels / hostels / guesthouses / private homes	30 / 28 / 3 / 51
Tourist-class vehicles, units	123
Cultural heritage sites / pilgrimage sites / museums	94 / 35 / 12

Growth continued in 2025: in January–July, the region received more than 199.3 thousand foreign tourists, almost equal to the entire previous year, while tourism services exports in the first half of the year reached 26.1 million US dollars and more than 1.6 million domestic tourists visited the region in January–June. As of 1 August 2025, 13 new tourism enterprises (eight tour operators and five travel agencies), two hotels, nine hostels and three guesthouses had started operating. The regional plan for 2025 envisaged 300 thousand foreign and more than 2.6 million domestic tourists, and the target for 2026 has been raised to 500 thousand foreign and 3 million domestic tourists (Figure 1).[12]

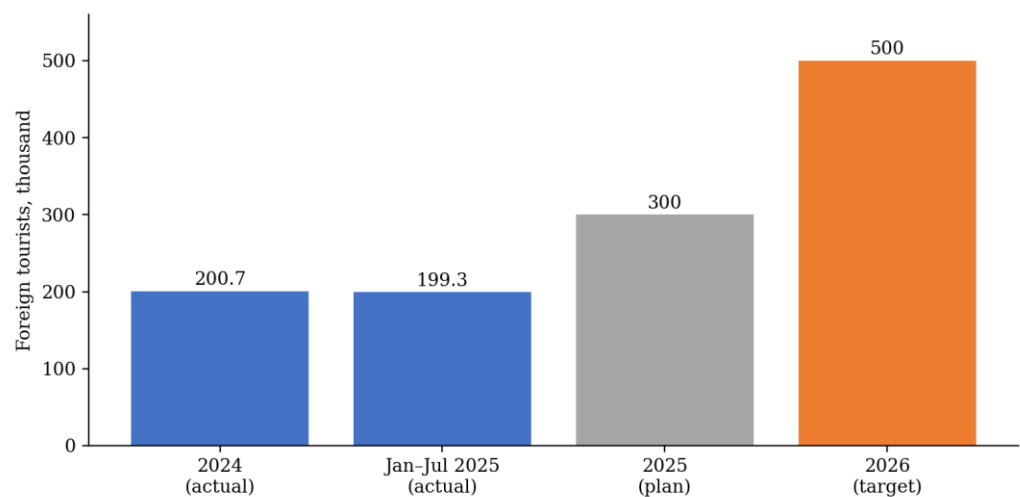


Figure 1. Foreign tourist flows to the Republic of Karakalpakstan: actual values and targets, thousand persons (compiled by the author based on)

However, the official statistics on the tourism industry reveal a much more modest picture. According to the National Statistics Committee, only 9 travel companies submitting statistical reports operated in Karakalpakstan in 2024 (1.2% of the national total); they served 18.3 thousand people and sold 17.9 thousand tours. For comparison, travel companies in neighbouring Khorezm served 497.5 thousand people, or 25.2% of the national total. The difference between 80 registered tourism companies and 9 reporting ones indicates that most regional operators are either micro-firms with minimal turnover

or are not yet covered by statistical reporting. Table 4 compares the capacity of collective accommodation in Karakalpakstan with the leading tourist regions.[13]

Table 4. Hotels and similar accommodation facilities: Karakalpakstan in comparison with leading tourist regions, 2024

Region	Facilities, units	Guests, thousand	Rooms	Beds	Guests per bed	Share of national beds, %
Karakalpakstan	52	38.4	691	1,579	24.3	2.0
Khorezm	100	177.2	2,441	4,955	35.8	6.2
Bukhara	250	267.2	3,980	8,423	31.7	10.6
Samarkand	361	428.4	6,603	13,827	31.0	17.4
Uzbekistan	2,383	2,864.3	38,075	79,469	36.0	100.0

The data show two structural problems. First, the scale of the accommodation base is disproportionately small: Karakalpakstan, which covers about 37% of the country's territory, has only 2.0% of the country's hotel beds and received 1.3% of hotel guests. The density of hotel beds is about 9.5 per 1,000 km², compared with about 177 per 1,000 km² for the country as a whole. Second, the existing capacity is used less intensively: each hotel bed in the region received on average 24.3 guests per year, compared with 31–36 in the leading regions and 36.0 nationally (Figure 2).

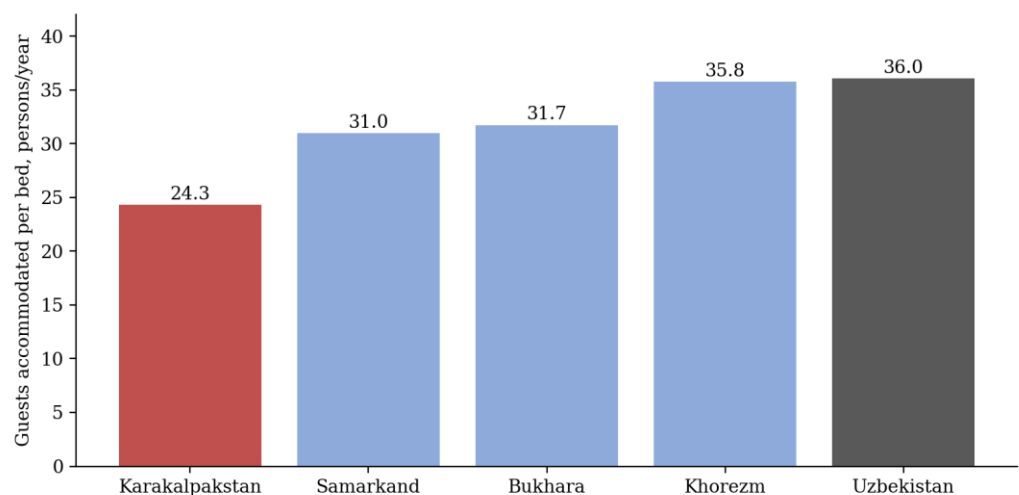


Figure 2. Guests accommodated per hotel bed per year, 2024 (calculated by the author based on)

Taking all types of collective accommodation into account (hotels, specialised and individual facilities), the region had 77 facilities with 1,160 rooms and 3,326 beds, which accommodated 58.9 thousand people in 2024. Comparing this with the total visitor flow (200.7 thousand foreign and over 2 million domestic visitors) gives a capture ratio of about 2.7%. Even allowing for methodological differences between sources and for accommodation in unregistered private homes, this means that the overwhelming majority of visits to Karakalpakstan are same-day excursions or visits to relatives rather than overnight tourist stays in the sense of IRTS 2008. Together with the dominance of Khorezm travel companies, this points to significant value leakage: tours to Karakalpakstan are largely sold and serviced from Khiva, while accommodation and a considerable part of spending remain outside the region.[14]

Reaching the 2026 target of 500 thousand foreign tourists requires a 2.5-fold increase compared with 2024, which corresponds to an average annual growth rate of about 58%

over two years. To assess whether the accommodation base is adequate for this goal, the author calculated the number of beds required under alternative assumptions about the share of overnight visitors and the average length of stay, with an average annual bed occupancy of 60% (Table 5).

Table 5. Scenario estimate of bed capacity required to accommodate 500 thousand foreign tourists

Scenario	Share of overnight visitors, %	Average stay, nights	Bed-nights, thousand	Beds required
A. Excursion-dominated	30	1.5	225	≈ 1,030
B. Moderate	50	2.0	500	≈ 2,280
C. Stay-oriented (target model)	70	2.5	875	≈ 4,000

Scenario C, which reflects the strategic aim of converting excursions into multi-day stays, requires about 4,000 beds for foreign tourists alone. This exceeds the region's entire current collective accommodation capacity (3,326 beds) before domestic demand is even taken into account. Consequently, the 2026 target can be achieved in terms of arrivals largely through day trips, but the economic effect for the region will then remain limited. For tourism to become a genuine driver of the regional economy, as set by the state, the growth of arrivals must be accompanied by accelerated development of accommodation capacity and multi-day products.[15]

To identify external factors affecting the development of tourism in the region, a PESTEL analysis was carried out (Table 6).

Table 6. PESTEL analysis of the external environment of tourism in the Republic of Karakalpakstan

Factor	Content	Impact on tourism
Political	High priority of the region in state policy; tourism declared a driver of regional development; extension of regional investment incentives supported	Strongly positive
Economic	Rapid economic growth: from last to 7th place among regions in per capita terms; 2025 GRP of 54.3 trillion soums; exports of 435 million USD and FDI of 2.5 billion USD in 2025 with plans for further growth; however, poverty reduction remains a priority in several districts, including Muynak	Positive; growing investment potential, but limited local purchasing power and small business capital
Social	Rich intangible heritage and hospitality traditions; need for employment in remote districts; shortage of trained tourism staff	Positive for community-based tourism; staff shortage is a constraint
Technological	Digital promotion via the regional tourism portal and social media; planned IT university, technopark and data centre projects	Moderately positive; opportunities for digital booking and interpretation
Environmental	Consequences of the Aral Sea catastrophe; harsh continental climate; water scarcity; planned investments in water supply and sanitation	Dual: basis of a unique product, but a source of health, seasonality and carrying-capacity risks

Legal	Tourism law and regional incentives; statistical reporting based on IRTS principles	Positive; need to harmonise regional and national tourist statistics
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The PESTEL analysis shows that the political and economic environment is currently the most favourable in the region's recent history. Planned infrastructure investments, including the Aral logistics centre in Kungrad to be established by the end of 2027 and 200 million US dollars for water supply, sewerage and road projects, will also improve the supporting conditions for tourism. The principal external risks are environmental and relate to the carrying capacity of fragile desert and former seabed ecosystems.[16]

Based on the results obtained, a SWOT analysis of the tourism sector of the region was carried out (Table 7).

Table 7. SWOT analysis of the tourism sector of the Republic of Karakalpakstan

Strengths	Weaknesses
Globally unique attractions (Aral Sea, Savitsky Museum, desert fortresses, Ustyurt); strong authenticity and "off the beaten track" image; rich intangible heritage; strong state support and region-specific incentives; proximity to Khiva, a major international hub	Small and underused accommodation base (2.0% of national beds, 24.3 guests per bed); excursion-dominated demand and low capture ratio ($\approx 2.7\%$); weak regional tour operators; long distances between sites; harsh climate and pronounced seasonality; shortage of qualified staff; inconsistent tourism statistics
Opportunities	Threats
Rapid growth of inbound tourism to Uzbekistan; growing global demand for dark, educational, adventure and eco-tourism; new investment projects (Barsakelmes zone, glamping, modernised Aral Sea museum, 5-star hotel in Nukus); integration into the national tourist ring; event tourism (Stihia, rallies, forums)	Environmental risks of the Aral Sea region (dust and salt storms, water scarcity); risk of "disaster voyeurism" and reputational damage; leakage of tourist spending to other regions; competition from Kazakhstan and Turkmenistan desert destinations; overload of fragile sites without carrying-capacity management

The SWOT matrix confirms that the region's key strategic problem is not a lack of attractions but the weakness of the elements that convert attractiveness into income: accommodation, local operators, product packaging and destination management.[17]

4. Discussion

The results are consistent with the destination competitiveness theory, according to which unique core resources are a necessary but not sufficient condition for competitiveness; supporting factors and destination management are decisive. From the standpoint of Butler's model, Karakalpakstan is at a critical point: if infrastructure and product decisions are made now in favour of multi-day stays and local operators, the region can develop as an independent destination; if not, it risks consolidating as a "satellite" of Khiva, generating arrivals but little income.

Based on the analysis, the author proposes a spatial development model "Nukus hub – thematic spokes" (Figure 3). In this model, Nukus acts as the service hub concentrating accommodation, operators, transport and the main cultural attractions, while thematic clusters (spokes) form multi-day routes: the Aral Sea cluster (Muynak), the adventure cluster (Ustyurt – Barsakelmes), the archaeological cluster (Ellikkala fortresses), the pilgrimage cluster (Mizdakhan, Chilpik), the nature cluster (Lower Amudarya reserve, Karateren) and the gateway link with Khiva. The model reverses the current flow logic: instead of day trips from Khiva to individual sites, Nukus becomes the base for 2–4-day circuits, with Khiva functioning as an entry point.[18]

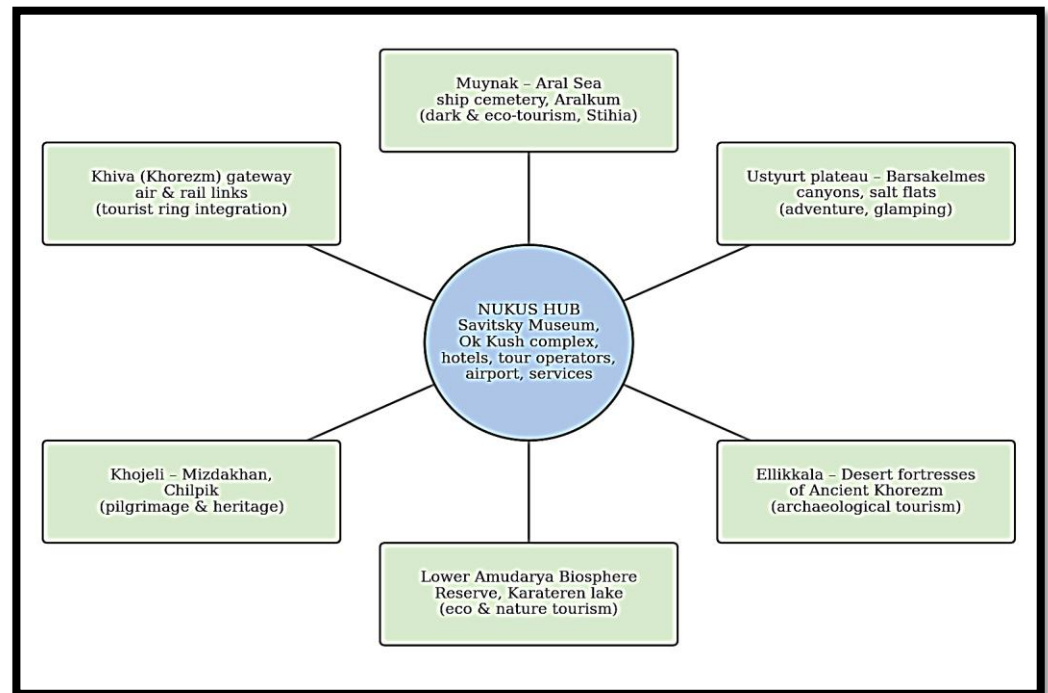


Figure 3. “Nukus hub – thematic spokes” spatial model of tourism development in the Republic of Karakalpakstan (developed by the author)

For each cluster, priority products, target markets and necessary measures were determined (Table 8).

Table 8. Portfolio of priority tourism products of the Republic of Karakalpakstan (developed by the author)

Product	Content	Target segments	Key measures
“Aral Sea: lessons of the lost sea”	Educational dark and eco-tourism: Muynak, museum, former seabed, meetings with residents	Europe, East Asia, students, scientific tourism	Interpretation standards, modernised museum, ethical guidelines, local guides
“Ustyurt expedition”	Canyons, salt flats, glamping, stargazing, 4x4 tours	Adventure travellers, photographers	Glamping zones, safety and rescue system, vehicle incentives
“Desert castles of Ancient Khorezm”	Fortress circuit with yurt camps	Cultural tourists, combined with Khiva	Joint Khiva–Nukus packages, signage, interpretation centres
“Nukus – city of avant-garde art”	Savitsky Museum, theatres, crafts, cuisine, Ok Kush complex	Art tourists, city breaks, MICE	Evening programmes, festivals, direct flights and rail packages
Pilgrimage and domestic tourism	Mizdakhan, Chilpik, family and school trips	Domestic market (3 million target)	Affordable packages, transport, service standards at sites
Events	Stihia, rallies, ethno-festivals, forums	Youth, international media	Annual event calendar, promotion at fairs (funded under)

Three conditions are critical for implementing the model. First, retention of spending: support for Nukus-based and district-based operators (including the incentives already provided) should be tied to the sale of multi-day packages, and accommodation

development should give priority to family guesthouses and yurt camps in the clusters, in line with the community empowerment approach. Second, responsible interpretation of the Aral Sea: the Muynak product should be designed as an educational and memorial experience that communicates the causes of the catastrophe and the current environmental measures, thereby placing it at the “lighter”, education-oriented end of the dark tourism spectrum. Third, statistics and management: harmonising regional tourist counts with IRTS 2008 and distinguishing tourists from same-day visitors is necessary for setting realistic targets and evaluating policy effectiveness.[19]

To make the proposals operational, the author has developed an implementation roadmap with measurable indicators (Table 9). The target values are expressed as directions of change rather than fixed numbers, because they should be calibrated using harmonised statistics.

Table 9. Implementation roadmap for tourism development in the Republic of Karakalpakstan (developed by the author)

Stage	Measures	Monitoring indicators
2026–2027 (short term)	Launch of joint Khiva–Nukus multi-day packages; Aral Sea interpretation standards and guide training; harmonisation of regional statistics with IRTS; support for guesthouses and yurt camps in Muynak, Ellikkala and Ustyurt	Number of overnight foreign tourists; average length of stay; number of registered beds; share of tours sold by regional operators
2028–2030 (medium term)	Commissioning of the Barsakelmes zone and glamping zones; hotel development in Nukus; annual event calendar; digital booking platform for regional products; carrying-capacity rules for fragile sites	Capture ratio; guests per bed; tourism services exports; employment in tourism; visitor satisfaction index

The roadmap is based on the principle that each stage should increase not only arrivals but also the depth of the regional value chain.

The key indicator of success for Karakalpakstan’s tourism should not be the number of arrivals, but the number of overnight stays and the share of tourist spending retained in the region. It is advisable to include the capture ratio and the average length of stay among the official target indicators for the region alongside arrival numbers.

5. Conclusion

The study leads to the following conclusions and recommendations. The Republic of Karakalpakstan possesses a diverse and globally unique tourism resource base (94 cultural heritage sites, 35 pilgrimage sites, 12 museums, the Aral Sea landscape and the Ustyurt plateau), which forms a strong foundation for dark, educational, archaeological, adventure, eco- and event tourism. Tourist flows are growing rapidly: 200.7 thousand foreign and over 2 million domestic tourists in 2024 and 199.3 thousand foreign tourists in January–July 2025. However, the tourism industry lags behind demand: the region accounts for only 2.0% of the country’s hotel beds, receives 24.3 guests per bed compared with 36.0 nationally, and captures only about 2.7% of visitors in collective accommodation, which indicates excursion-dominated demand and value leakage. Scenario analysis shows that reaching the 2026 target of 500 thousand foreign tourists in a stay-oriented format would require about 4,000 beds for foreign tourists alone, which exceeds the entire current collective accommodation capacity of the region (3,326 beds). The “Nukus hub – thematic spokes” spatial model and a portfolio of six priority products are proposed, aimed at converting day trips from Khiva into multi-day stays based in Nukus and the thematic clusters. It is recommended to: accelerate the development of accommodation capacity, with priority given to family guesthouses and yurt camps in the clusters; tie incentives for tour operators to multi-day packages; develop Aral Sea interpretation standards; create

joint Khiva–Nukus packages; and include the average length of stay and the capture ratio in the region’s official target indicators.

Further research should focus on survey-based estimation of tourist spending and the regional tourism multiplier, which would make it possible to quantify the contribution of tourism to the gross regional product of Karakalpakstan.

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