Wellness Tourism and Its Development: Global Trends, Research Gaps and Opportunities within Uzbekistan

Makhmudov Shakhzodjon Sharofjon ugli
International University of Tourism and Cultural Heritage,
Faculty of Tourism (Tourism and Hospitality), TH 626

Abstract. Wellness tourism has gained significant importance within the global market. Using 15 sources research into wellness tourism was identified. Data from the UN Tourism and recent data within the market was used. Overall it can be concluded that it is a domestic and internal market where people spend significantly more. With Uzbekistan having record growth within tourism there is a good opportunity to offer a modern and measurable product.

Introduction

Health tourism can be defined as travel with the primary purpose of improving physical, mental or spiritual well-being (UN Tourism/UNWTO). This falls under wellness and medical tourism. Wellness tourism is part of the preventative aspect of health tourism. This can be defined as 'healthy tourists that go on wellness trips to improve or maintain their health and wellbeing'. Wellness is a bigger market than medical tourism. Definitions within this article will follow those of UN Tourism.

Literature Review

There are 4 categories of sources. 6 Review articles. 1 UN Tourism/ETC report on health tourism. 6 Articles on Uzbekistan and 2 Industry sources. The review articles show there is a lot of literature surrounding this market with 214 papers indexed between 2001-2024. Another review found 499 papers. Another found 72 empirical papers between 2019-2023. However there were issues relating to coherence and wellness not being categorised correctly. There was also a lack of causality. The UN Tourism/ETC report suggested improvements in data collection and accurate measurements All of the Uzbek sources mention Sanatoriums and potential for recreation but also mention poor infrastructure, no government support and high prices. It also suggests creating marketing platforms and focusing on domestic marketing. It also suggests creating eco wellness packages. Table 1 explains the gaps identified.

Table 1: Gaps Identified

Gap Identified	Evidence in Sources	How Gap Was Addressed
Lack of Standardised Terminology	Not Coherent and Issues with Categorisation of Wellness	UN Tourism definitions were used as there needs to be standardised categories.
Out Of Date Data	1 Source from 2020 stated this would be US$919 billion by 2022 ; the actual 2022 value was US$651 billion.	Data from UN Tourism (2023-2025) and Data from Global Wellness Institute (2024).

No Correlation to Arrivals	Little correlation to UN Tourism arrivals.	Created correlation between UN Tourism and Wellness tourism.
Not Focused on Domestic Market	Research was focused on International arrivals but most wellness is domestic.	Split into Domestic & International.
High Prices	Due to high prices not many people can access health tourism. Mentioned Inclusivity.	Added Affordability & Measurability.

Global Development

Wellness tourism has developed within a disrupted market. International arrivals decreased by 22% in Q1 of 2020. The UN Tourism predicted a decrease of 60-80% for international arrivals However, arrivals increased to 1.3 Billion in 2023, showing a recovery of 89% of 2019. Arrivals increased further to 1.4 Billion in 2024, showing a recovery of 99% of 2019. Europe had the most arrivals with 747 Million. UN Tourism also reported record revenue of US$1,734 Billion in 2024 showing real increase of around 14% from pre pandemic. Arrivals increased to record numbers of 1.52 Billion in 2025 showing an increase of 4%. Table 2 shows key data.

Table 2: Key Data

Year	Data	Source
2020 (Q1)	International arrivals decreased by 22%. Projected to decrease by 60-80%.	(UN Tourism) (14)
2023	Arrivals increased to 1.3 Billion (Recovered 89% of 2019).	(UN Tourism) (23)
2024	Arrivals increased to 1.4 Billion (Recovered 99% of 2019). Increased revenue to US$1,734 Billion.	(UN Tourism) (16) (17)
2025	Arrivals increased to 1.52 Billion (+4%).	(UN Tourism) (18)
2022	819.4 Million wellness trips were taken. Only 7.8% of all trips however made up 18.7% of tourism spending. 88% were Domestic.	(GWI) (20)
2024	Wellness Tourism US$894 billion (+6.4% on 2023); wellness economy US$6.8 Trillion.	(GWI) (15)

Arrivals for Wellness are not published by UN Tourism so no measurements. Data was obtained from Global Wellness institute. Overall wellness tourism has increased significantly. 7.8% of trips were wellness in 2022 but 18.7% of spending was on wellness trips. This means wellness trips produce around 2.4x more spending on average. Most wellness is done domestically with only 95 Million trips (12%) being international. Compared to the Middle East and North Africa who had 50% international and 4% in North America. This means the UN Tourism data does not reflect much of this segment. Overall the segment has recovered and is set to continue to increase. Spending increased to 110% of 2019 in 2024. It is projected to increase by around 9.1% each year until 2029. Asia Pacific had 563 Million wellness trips in 2024 compared to Europe (348 Million). 9-16% of international arrivals were mountain tourism in 2019, looking for sport, health & wellbeing. This supports nature based wellness.

Key Drivers:

Wellness tourism is mainly driven by Technological Advancements, Personal Health, Data Protection and Urbanisation according to the UN Tourism/ETC report. This has resulted in the wellness economy reaching US$6.8 trillion in 2024, equal to 6.12% of global GDP, and is forecast to grow 7.6% a year to 2029 against 4.5% for global GDP. In other words, wellness is growing faster than the economy as a whole, and tourism is one of six wellness sectors expected to exceed US$1 Trillion by 2029.

Example of Development:

Thailand is a great example of how quickly wellness can recover if it is focused on. Wellness revenue fell from US$41.7 billion in 2019 to US$31 Billion in 2020, but in 2024 it increased to US$43 Billion. The Government now want to make Thailand the leading wellness and longevity destination in Asia. This shows how important government support and measurements are.

Opportunities within Uzbekistan

Uzbekistan has had incredible results. Arrivals have increased by 73% between Jan-Sept 2025 compared to 2019 making them one of the top 7 destinations globally. Arrivals increased by 13% compared to 2024, globally the average increase is around 5%. More than 10.7 Million Foreign tourists visited during the first 11 months of 2025. Arrivals increased to more than 1 Million per month from April. Tourism Export revenue has increased to more than US$4.4 Billion. The nations goal is to have 15 Million visitors per year by 2030. The largest source markets at the beginning of 2025 were neighbouring countries. (Kyrgyzstan, Tajikistan & Kazakhstan). This would mean the initial target market for Wellness would be regional.

Uzbekistan does have some amazing wellness resources. Health resorts are located mostly in rural & foothill areas. An example looked at was Zaamin sanatorium in Djizak Province. It also has therapeutic radon water in Bukhara region. All sources agree there are issues with poor infrastructure and little government support. High prices and poor marketing. There is no correlation to resources and demand. This was addressed in the recommendations.

Recommendations

1. **Use standardised terminology and measure wellness.** Include wellness as a reason for travelling in border & accommodation data.
2. **Target 2 Markets.** As most wellness is done domestically create products for locals in Uzbekistan and regional visitors. (Kyrgyzstan, Tajikistan & Kazakhstan).
3. **Modernise Sanatoriums.** Offer preventative, spa, mental wellness & eco therapy instead of treatment oriented. Combine with cultural routes in Samarkand, Bukhara & Khiva.
4. **Keep prices affordable.** Offer different packages to ensure wellness is accessible for non wealthy visitors.
5. **Create Marketing Platform.** Create websites, videos & mobile apps for wellness destinations.

Limitations & Further Research

UN Tourism data is for international arrivals and cannot be combined with GWI as it includes domestic & international wellness trips. Included for context. The Uzbek

sources do not mention wellness arrivals or spending meaning we can not quantify demand for wellness within the nation. This is why the first recommendation was to measure. Some sources were looked at using abstracts & press summaries. Figures should be verified by looking at original reports. Future studies could look into surveys on domestic & regional visitors to Zaamin & other sanatoriums. Compare results between Uzbekistan & Thailand.

Conclusion

The literature reviewed provides an insight into what wellness tourism is however often has issues with out of date data, little coherence and little correlation to official data. The UN Tourism data shows 2025 was a record year for tourism. Uzbekistan has had incredible growth. The GWI data shows there is a high demand for Wellness within the market as it is a domestic, high spending and growing market. This means Uzbekistan can capitalise on their sanatorium background by measuring demand, focusing on domestic & regional markets and keeping prices affordable.