



Article

## Prospects for The Development of Medical Tourism in Uzbekistan

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**Abstract:** Medical tourism has emerged as a significant sector within the global economy, driven by patient mobility and advancements in healthcare services. Uzbekistan has recognized the potential of medical tourism as part of its broader economic diversification strategy, yet remains a minor player with only 0.1% of the global market share despite regional patient inflows. There is a lack of integrated approaches addressing legal, infrastructural, human resource, digital, partnership, and regional development needs to establish Uzbekistan as a competitive destination. This study aims to analyze global trends in medical tourism, assess Uzbekistan's current position, and propose strategic directions to enhance its medical tourism sector. Findings show that factors such as cost savings, quality of medical services, technological advancements, and combining treatment with leisure drive global medical tourism growth. Uzbekistan has increased inbound medical tourists from 12,000 in 2015 to over 61,000 in 2023, yet key barriers include limited international certification of clinics and language barriers. The article proposes a cohesive multi-dimensional framework for development, including legal reforms, modern infrastructure, digital marketing platforms, foreign language training for staff, strategic partnerships, and region-based medical tourism clusters. Effective implementation of these recommendations could position Uzbekistan as a regional hub, generating up to \$300 million annually from medical tourism exports, enhancing economic growth, and integrating national healthcare into global service markets while improving access and quality for domestic patients.

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**Keywords:** Medical tourism, medical services, International Tourism Organization, gender equality, healthcare services, medical tourism market, tourism industry, COVID-19 pandemic.

### 1. Introduction

Nowadays, medical tourism — often referred to as health tourism — is rapidly gaining momentum and becoming increasingly popular. It is not only demonstrating fast-paced growth but also serving as a significant driver of economic development for many countries around the world. Over the past fifteen years, the international field of medical tourism has undergone substantial transformation, acquiring a structured framework and standardized evaluation criteria. A major milestone in this evolution was the introduction of the Medical Tourism Index in 2016 — a unique international ranking of countries specializing in medical tourism. This index offers an innovative approach to assessing the attractiveness of countries as medical tourism destinations. The index encompasses three key dimensions: the country, the healthcare sector, and the quality of services provided by medical institutions. It includes 34 core indicators. Canada, Singapore, and Japan have consistently ranked among the top performers in this index[1].

Medical tourism is associated with people from countries with underdeveloped healthcare systems traveling to more advanced nations to receive high-quality medical care. Patients may also choose specialized recommendations for specific treatments. According to estimates by the organization “*Patients Without Borders*”, approximately 21 to 26 million cross-border patients were officially registered worldwide in 2023, with each spending an average of around 3,500 USD per visit[2].

#### **Literature review**

Medical tourism is currently one of the fastest-growing sectors on a global scale. According to data from the World Health Organization (WHO), the United Nations World Tourism Organization (UNWTO), and Global Healthcare Resources, the medical tourism market generates billions of dollars annually and presents significant economic opportunities for developing countries. Foreign scholars such as C. Carrera and C. Bridges define medical tourism as “traveling abroad for the purpose of restoring health” and highlight key factors influencing the development of this sector, including cost, quality of services, technological base, climate conditions, and cultural aspects. Furthermore, Lunt and Mannion emphasize the global impact of medical tourism on healthcare systems, patient mobility, and safety issues. The experiences of countries such as China, India, and Thailand show that state policies, investment attraction, and service diversification are critical success factors in this field[4].

In the context of Uzbekistan, in recent years, local researchers have also paid special attention to studying the potential of medical tourism. In particular, economists A. Akhmedov and Z. Komilova have analyzed the economic foundations and organizational-regulatory factors for developing medical tourism in Uzbekistan. Their research identifies the infrastructure of medical institutions, the quality of services, and human resource capacity as key components. Additionally, S. Juraev, in his article, explores the possibilities for developing medical tourism in the Fergana Valley from a regional perspective. Another local scholar, D. Karimov, examines medical tourism in relation to the modernization of Uzbekistan's healthcare system, highlighting the importance of service standards and logistics systems for foreign patients. Moreover, recent reports published by the Research Center under the Ministry of Tourism and Cultural Heritage indicate the need to develop a strategic framework for positioning medical tourism as one of the sustainable forms of tourism[5].

## **2. Research Methodology**

In this study, a systematic approach is employed to examine the current state of medical tourism in Uzbekistan and explore its development opportunities. Data collection involves both primary (interviews, surveys) and secondary (official statistics, academic articles, government reports) sources. Analytical methods such as SWOT analysis, comparative analysis, and regression analysis are applied to thoroughly investigate the economic, social, and institutional aspects of medical tourism. Additionally, comparative analysis with international practices is conducted to identify effective strategies that can be adapted to the context of Uzbekistan[3].

## **3. Analysis And Results**

In recent years, due to the rising cost of medical services, medical tourism has gained popularity among residents of developed countries who seek more affordable treatment options in less developed nations. The demand for medical tourism has witnessed a particularly sharp increase since the onset of the COVID-19 pandemic[6].

One of the largest markets for medical tourism is the United States. Owing to the high cost of healthcare in the U.S., more than 4 million Americans travel abroad each year for medical purposes — accounting for approximately 9% of all medical tourists globally[7].

According to the Organisation for Economic Co-operation and Development (OECD), the cost of a heart valve replacement surgery, which typically ranges between \$130,000–\$150,000 in the U.S., may cost only \$9,250 in Poland, \$9,000–\$11,000 in India, and about

\$11,000 in Thailand — resulting in an average savings of 91%–95% compared to U.S. prices[8].

Similarly, the cost of a facelift (rhytidectomy) in the U.S. ranges from \$10,000 to \$16,000. In comparison, the same procedure costs \$5,500–\$6,500 in Brazil (47%–59% savings), \$3,000–\$4,000 in Turkey (60%–65% savings), and \$2,500–\$3,500 in Malaysia (70%–77% savings)[9].

Today, there are a number of factors influencing the development of medical tourism, which are presented in Table 1 below.

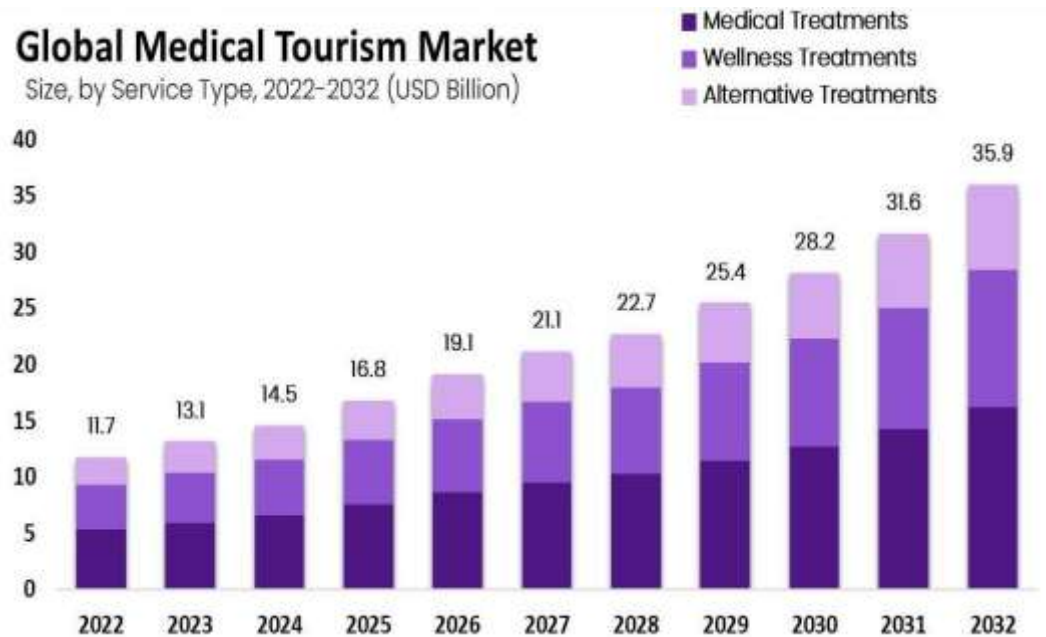
**Table 1.** Factors influencing the development of medical tourism in different countries

<b>Factor</b>	<b>Explanation</b>
Cost savings	The primary reason for medical tourism is to reduce expenses: treatments are often 30–80% cheaper than in the patient's home country.
Quality of medical services	Nearly 50% of medical tourists choose destinations due to access to high-quality healthcare services.
Lack of medical insurance	About 25% of patients travel abroad for treatment because certain procedures are not covered by their insurance plans.
Shorter waiting times	Long domestic waiting lists drive around 20% of patients to seek faster treatment options abroad.
Advanced medical technologies	Approximately 30% of medical tourists travel to benefit from cutting-edge medical technologies and treatment methods.
Privacy	Roughly 15% of patients prioritize the confidentiality offered by international medical institutions.
Lack of local expertise	Around 20% of medical tourists seek treatment abroad due to the unavailability of specific medical expertise in their home country.
Alternative treatment options	Nearly 10% of medical tourists are attracted by the availability of alternative and holistic treatment methods in certain destinations.
Combining treatment with leisure	About 40% of patients view medical travel as an opportunity to combine treatment with relaxation and vacation.
Recommendations and referrals	Advice from friends, family, and healthcare professionals influences the decision of approximately 25% of patients considering medical tourism.

According to the International Tourism Association, the global medical tourism market reached \$13.1 billion in 2023. This figure is expected to almost triple and reach \$35.9 billion by 2032. During this period, the market is projected to grow at an average annual growth rate (CAGR) of 12.2%. According to estimates by *Harvard Medical Publishing*, the medical tourism industry generates over \$100 billion in annual revenue for the global economy[10].

Figure 1 emphasizes the rapidly growing global medical tourism market, with an increasing demand for medical, wellness, and alternative treatments, contributing over \$100 billion annually to the global economy according to Harvard Medical Publishing estimates[11].

Figure 1. Global medical tourism market growth, 2022–2032



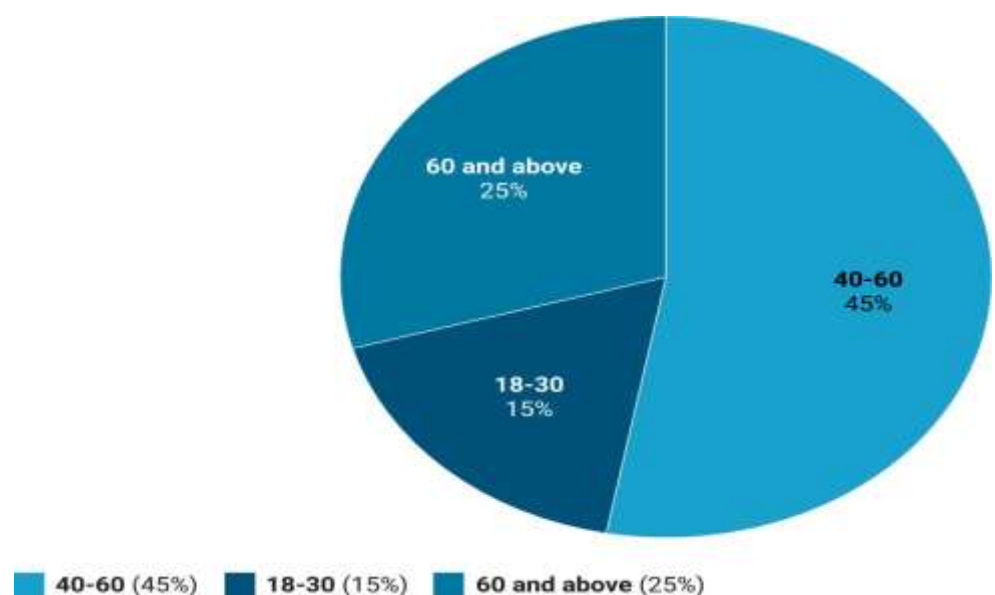
Nearly 50 million medical tourists travel across countries each year worldwide. In 2023, Thailand ranked first on the global list due to the number, quality, and accessibility of its hospitals, capturing a 22% market share with around *2 million foreign patients* seeking medical care — often at 30%–70% lower costs than in Western countries[12].

India is also becoming an increasingly attractive destination for medical tourists. Its market share grew from 18% in 2023 to 20% in 2024, offering medical services up to 65% cheaper than in the West and providing over 20,000 registered hospital beds specifically for international patients.

Malaysia holds third place in the global medical tourism market. In recent years, the number of medical tourists visiting Malaysia has grown by 20% annually, surpassing 1 million visitors, with treatment costs being 30%–40% lower than in Western countries[13].

In terms of demand for medical tourism services, **the** leading source countries **are** China, the United States, and Canada. According to data published in the International Medical Travel Journal, the distribution of medical tourists by age and gender categories is as follows (Figure 2):

Figure 2. Distribution of medical tourists by age group



**Age group:** The majority of medical tourists are between the ages of 40 and 60, accounting for approximately 45% of the total number of patients.

**Gender composition:** women make up the higher percentage of medical tourists, representing about 60% of those who travel for medical purposes.

**Young patients:** There is a growing trend among younger individuals aged **18 to 30**, who now comprise around 15% of all medical tourists.

**Elderly medical tourists:** Patients aged 60 and above make up approximately 25% of medical tourists. They primarily seek joint replacements and cardiac surgeries[14].

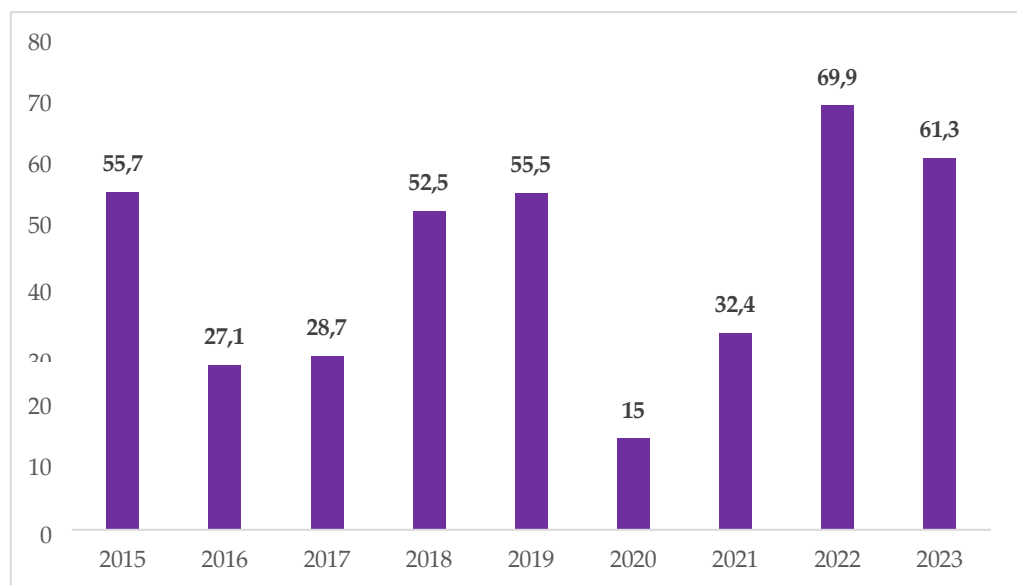
**Gender preferences in treatment:** Women dominate in cosmetic procedures, accounting for nearly **80%** of patients in that field, while men are more likely to seek treatment in cardiology and orthopedics.

Today, high-demand medical services in the field of medical tourism include cosmetic surgery (25%), dentistry (15%), orthopedic surgery (12%), and cardiac surgery and organ transplants (10%). In addition, demand is rapidly increasing for assisted reproductive technologies such as in vitro fertilization (IVF) and surrogacy, which account for around 12% of the market.

Asian countries are increasingly integrating Ayurveda, homeopathy, and other traditional and alternative therapies into their existing medical offerings. These treatments are witnessing a significant surge in popularity among patients from Western countries[15].

In Uzbekistan, medical tourism is emerging as a new and promising direction within the hospitality industry. Notably, the development of medical tourism in Uzbekistan was first discussed in 2015, at which time the number of foreign nationals visiting the country for medical treatment reached 12,000. According to data from the State Statistics Agency under the President of the Republic of Uzbekistan, this figure rose to 61,300 visitors in 2023 (Figure 3).

**Figure 3.** Dynamics of inbound tourist flow for medical treatment (2015–2023)



The top five countries by number of medical tourists visiting Uzbekistan are: Tajikistan (43.2 thousand visitors), Kazakhstan (10.7 thousand), Kyrgyzstan (5.5 thousand), Russia (1.1 thousand), and Turkmenistan (0.5 thousand). It is important to note that this destination is not yet widely popular among foreign nationals. In terms of the number of foreign patients, Tashkent region leads, followed by Namangan and Fergana regions. Despite the positive growth trend in inbound indicators, Uzbekistan continues to lag in terms of both market size and attractiveness in the global medical tourism sector. The country accounts for just over 0.1% of the global market. According to national experts,

Uzbekistan has the potential to generate \$300 million annually solely from the export of medical tourism services. One of the main barriers to growth in this segment has been the lack of an integrated approach to the comprehensive development of medical and wellness tourism. Over the past five years, the number of private clinics has increased, but only a limited portion of them hold international certification.

In 2024, in order to improve the situation, the President of the Republic of Uzbekistan adopted Resolution No. PQ-335, titled "On Additional Measures for the Further Development of Medical and Wellness Tourism in the Republic of Uzbekistan." Within the framework of this resolution, the Medical Hospitality Program was launched, and the establishment of medical clusters was officially announced. It was envisioned to create integrated service tourism companies that would provide a full package of services: consulting – diagnostics – treatment – tour operator – transportation – medical translation. Private clinics were granted the opportunity to obtain certification and participate in international exhibitions with expenses covered from the off-budget funds of the Ministry of Health. Additionally, provisions were introduced to reimburse VAT for services provided to foreign patients.

What Needs to Be Done to Improve the Situation? In our opinion, the first and foremost step is to place greater emphasis on communication with foreign visitors. According to Euromonitor International, one of the main sources of dissatisfaction among medical tourists is the language barrier. It is essential to improve foreign language proficiency among medical institution staff and to ensure that websites are available in the languages of potential clients.

Furthermore, it is necessary to incorporate foreign language education into national education standards for higher and secondary vocational training in healthcare-related fields, treating it as both a general professional and occupational competency.

Second, Uzbekistan should organize more international events, showcase the capabilities of national medical centers, professionals, and modern equipment, and attract major international partners who are active in and promote medical tourism. It is important to note that awareness of Uzbekistan's medical services, clinics, and specialists remains low abroad.

Third, the development of medical insurance products and a structured insurance system could serve as an effective tool for enhancing medical tourism.

Fourth, improving statistical accounting is critical. This would allow for an objective assessment of the national medical tourism market (inbound/outbound flows, revenues, expenditures, etc.).

Fifth, it is necessary to modernize the wellness infrastructure by offering tax incentives to organizations that invest in the purchase of modern medical equipment, the renovation of existing facilities, or the construction of new ones. Unlike outdated Soviet-era sanatoriums or traditional resorts in Eastern and Western Europe, foreign tourists are willing to spend money on high-quality wellness services.

Sixth, a dedicated medical tourism website (or section) should be developed, providing detailed information on services, providers, pricing, treatment and wellness programs, accommodation and dining for accompanying persons, visa requirements, insurance options, and more. This website must be maintained in multiple languages, including Russian, English, Arabic, Chinese, Spanish, and French.

Seventh, educational standards specific to medical tourism should be developed, particularly training on organizing medical tours, communicating with healthcare staff, and more. These programs could be launched based on technical schools for tourism and hospitality.

Offers. To effectively develop medical tourism in Uzbekistan, a comprehensive approach covering legal, infrastructural, human resource, digital, partnership, and regional aspects is essential.

1. Legal and regulatory framework. A solid legal foundation is crucial for ensuring the quality and reliability of medical tourism services. Uzbekistan should focus on drafting specific laws and regulatory documents that govern medical tourism. Simplifying the licensing and accreditation processes for exporting medical services will also encourage more providers to enter the market and maintain international standards.
2. Infrastructure and technology. Modern infrastructure is a key driver for attracting international patients. Medical institutions need to be equipped with up-to-date medical equipment and technology. Additionally, supporting the construction of medical and clinical centers that comply with international quality standards will enhance the country's competitiveness in the global medical tourism market.
3. Human resources capacity. The skills and capabilities of medical personnel directly impact patient satisfaction and outcomes. Introducing language training courses (such as English, Russian, and Arabic) will help healthcare workers communicate better with foreign patients. Furthermore, attracting international experts and implementing advanced training programs will raise the overall quality of medical services.
4. Digital services and marketing. In today's digital age, having a strong online presence is vital. Developing user-friendly online platforms where potential medical tourists can learn about, compare, and book medical services simplifies the decision-making process. In parallel, implementing effective digital marketing and SEO strategies will increase Uzbekistan's visibility and appeal in the international market.
5. Partnership relations establishing and expanding partnerships with foreign insurance companies, clinics, and travel agencies will create integrated service offerings that facilitate seamless patient experiences. Active participation in international exhibitions and forums focused on medical tourism will help promote Uzbekistan's services and foster strategic collaborations.
6. Regional potential leveraging the unique regional characteristics of Uzbekistan can diversify and enrich the medical tourism offer. Developing medical tourism clusters in areas like the Fergana Valley, Bukhara, and Samarkand by utilizing local resources will create specialized destinations. Additionally, offering therapeutic tourism based on sanatoriums, natural recreational areas, and favorable climate conditions can attract tourists seeking wellness and recovery services.

In summary, by addressing these six strategic directions cohesively, Uzbekistan can build a robust medical tourism industry that meets international standards, attracts foreign patients, and stimulates regional economic growth.

Table 2 presents a multi-dimensional strategic plan to develop medical tourism in Uzbekistan by focusing on legal reforms, infrastructure modernization, human capacity building, digitalization, international partnerships, and leveraging regional assets to attract foreign patients and stimulate economic growth.

**Table 2.** Proposals for the development of medical tourism in Uzbekistan

№	Direction	Proposals
1	Legal and regulatory framework	- Develop specific laws and regulatory documents related to medical tourism - Establish a simplified licensing and accreditation system for the export of medical services
2	Infrastructure and technology	- Equip medical institutions with modern medical equipment - Support the construction of medical-clinical centers that meet international standards
3	Human resources capacity	- Introduce training courses for medical staff in foreign languages (English, Russian, Arabic) - Attract international experts and implement advanced training programs

4	Digital services and marketing	- Create online platforms for showcasing and booking medical services - Develop digital marketing and SEO (Search Engine Optimization) strategies
5	Partnership relations	- Expand cooperation with foreign insurance companies, clinics, and travel agencies - Actively promote Uzbekistan at international exhibitions and forums specialized in medical tourism
6	Regional potential	- Develop medical tourism clusters in regions such as the Fergana Valley, Bukhara, and Samarkand based on local resources - Offer therapeutic tourism services using sanatoriums, recreational areas, and favorable climate conditions

#### 4. Conclusion

In conclusion, it should be emphasized that the development of medical tourism at the current stage is closely linked to the broader processes of globalization. The opening of borders, the integration of economies, and the growing desire of individuals to improve their health, enhance their quality of life, and extend longevity are all driving forces behind the rapid advancement of healthcare and the formation of the global medical tourism market. Uzbekistan possesses all the necessary resources and potential to successfully develop this sector and expand into new international markets. Addressing the existing challenges and implementing the proposed recommendations can lead to the establishment of a sustainable and competitive medical tourism industry, one that will benefit both the national economy and the population

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