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THE DEVELOPMENT OF MARKETING IN THE REPUBLIC OF UZBEKISTAN: CURRENT TRENDS AND DIGITAL TRANSFORMATION

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Abstract. This article examines the current trends in the development of marketing in the Republic of Uzbekistan amid the digital transformation of the economy. On the basis of up-to-date data for 2024–2026, it analyses the state of the digital audience, the dynamics of the advertising market, the structure of social platforms and the development of e-commerce. It is shown that marketing in the country is undergoing a transition from traditional channels to digital ones: the mobile-advertising market reached USD 150–160 million in 2024, while the leading communication platform has become the Telegram messenger, with an audience of about 25 million users. The key drivers and priority directions for the sector's development are identified.

Keywords: marketing, digital marketing, advertising market, social media, Telegram, e-commerce, Uzbekistan.

1. Introduction

Marketing is a crucial tool for promoting goods and services, generating demand and increasing the competitiveness of companies. In recent years, under the influence of the digitalisation of the economy and the rapid growth of the online audience, marketing in the Republic of Uzbekistan has been undergoing a qualitative transformation: budgets and activity are shifting from traditional channels (television, outdoor advertising, print) to the digital environment.

The young age structure of the population (a median age of about 27), the high level of internet penetration and the dominance of mobile access create favourable conditions for the development of digital marketing. These factors make the market attractive to both local and international companies.

The aim of the article is to identify the current trends and to determine the priority directions of marketing development in Uzbekistan on the basis of an analysis of up-to-date sectoral data.

2. Materials and Methods

The information base of the study comprises data from the National Statistics Committee of the Republic of Uzbekistan, analytical reports by DataReportal (Digital 2025: Uzbekistan), forecasts by Statista, and sectoral reviews by digital agencies (Wunder Digital, BYYD, 101 Digital). The methods of descriptive statistics and structural and comparative analysis are applied for the period 2024–2026. It should be borne in mind that estimates of the number of users of individual platforms cited by various sources may differ owing to different counting methodologies.

3. Results

3.1. Digital audience and infrastructure

Uzbekistan's digital environment is characterised by a high level of engagement. By the beginning of 2025, the number of internet users reached 32.7 million, while the internet penetration rate is estimated in the range of 87–94 % depending on the methodology. About 89 % of users access the internet via smartphones, which makes mobile-oriented marketing strategies a priority. 4G network coverage has reached around 92 %, and in 2025 pilot 5G projects were launched in Tashkent.

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3.2. The advertising market

The digital segment of the advertising market is growing at an accelerated pace. The mobile-advertising market was estimated at USD 150–160 million in 2024 and, according to forecasts, will reach USD 190–210 million in 2025. The total digital-advertising market, according to Statista estimates, may grow to USD 368.3 million by 2028.

Table 1. Estimates and forecasts of the segments of Uzbekistan's digital-advertising market

Segment	Volume / forecast	Period
Mobile advertising	USD 150–160 million	2024
Mobile advertising	USD 190–210 million	2025 (forecast)
Digital advertising (total)	USD 368.3 million	2028 (forecast)
Search advertising	USD 212.6 million	2028 (forecast)

Source: Statista Market Forecast; 101 Digital, 2024–2026.

3.3. Social media and platforms

The structure of social platforms in Uzbekistan has a pronounced specificity. The undisputed leader is the Telegram messenger, whose audience is estimated at about 25 million users, corresponding to a reach of around 76 % of the internet audience. Telegram is actively used not only for communication but also as a sales channel — through Telegram Ads and built-in mini-applications (Mini Apps) with payment via the Click and Payme systems.

Table 2. Estimated audience of the leading platforms (based on industry data)

Platform	Users, million
Telegram	≈ 25.0
YouTube	≈ 7.2
Instagram	≈ 4.8
TikTok	≈ 3.5*
Facebook	≈ 2.1

* Access to TikTok in the country is restricted. Source: 101 Digital; Wunder Digital; DataReportal, 2025–2026.

3.4. E-commerce and new formats

The development of marketing is closely linked to the growth of e-commerce. The volume of the e-commerce market in 2024 was estimated at about USD 311 million (around 2 % of retail turnover) and, according to forecasts, is expected to grow several-fold by 2027. The domestic market leader is the Uzum Market marketplace, while the key payment services are Click and Payme. Among the new promotion formats are influencer marketing using micro- and nano-bloggers, the growth of video content and Uzbek-language content, and a shift by advertisers towards a performance approach with measurable indicators (CPA, conversions).

4. Discussion

The results obtained show that marketing in Uzbekistan is rapidly becoming digital. The main drivers are a young and mobile audience, a high level of internet penetration, the dominance of Telegram and the development of local digital platforms and payment systems. The relatively low competition in digital channels creates favourable conditions for the entry of new brands.

At the same time, a number of constraints persist. The quality and speed of mobile internet differ considerably between Tashkent and the regions, which affects campaign performance. Limited access

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to certain global platforms (in particular, TikTok) narrows the available toolkit. A shortage of high-quality Uzbek-language content, a lack of qualified specialists and the insufficient maturity of analytical tools also constrain the sector's development.

In addition, about half of the population lives in rural areas, which requires a combination of digital and traditional communication channels to fully reach the target audience.

Despite the rapid growth of the digital segment, traditional channels — television, outdoor advertising and radio — retain their importance, especially for reaching older age groups and the rural population. This shapes a trend towards omnichannel marketing: the most effective campaigns are integrated ones that combine digital and offline tools, local platforms and payment services into a single communication system. At the same time, the demand for transparency and the measurability of advertising investment is growing, which stimulates the development of the market for analytics and verification.

5. Conclusion

Marketing in Uzbekistan is at a stage of active digital transformation: the mobile-advertising market has exceeded USD 150 million, Telegram has become the dominant communication platform with a reach of about 76 % of the internet audience, and e-commerce is showing steady growth. These trends are shaping a new structure of marketing communications in the country.

For the sustainable development of the sector, it appears advisable to implement the following directions:

1) prioritising the development of mobile-oriented and performance strategies with measurable effectiveness indicators;
2) actively using Telegram, mini-applications and local platforms within cross-channel campaigns;
3) developing Uzbek-language content, primarily video formats;
4) combining digital and traditional channels to reach the rural audience;
5) training qualified personnel and improving the maturity of the market's analytical tools.

The consistent implementation of these measures will help increase the effectiveness of marketing communications and strengthen the competitiveness of companies in the rapidly growing market of Uzbekistan.

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