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PROBLEMS OF TOURISM INFRASTRUCTURE DEVELOPMENT IN UZBEKISTAN AND WAYS TO OVERCOME THEM

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Abstract

The thesis examines the problems of tourism infrastructure development in Uzbekistan, where inbound demand reached 11.68 million foreign visitors in 2025. Based on official statistics for 2017–2026, it compares the growth of demand with the expansion of accommodation, air transport and service infrastructure. Five constraints are identified: spatial concentration, a structural mismatch of the accommodation stock, transport connectivity gaps, seasonality, and weak digital and service readiness. Priority measures to remove them by 2030 are proposed.

Keywords: Tourism infrastructure; Uzbekistan; accommodation capacity; transport connectivity; seasonality; destination competitiveness; sustainable tourism development.



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Introduction

Tourism has become one of the fastest-growing sectors of Uzbekistan's economy. In 2025 the country received 11.68 million foreign visitors, 6.2 times more than in 2021, and exports of tourism services reached US$4.8 billion [6; 7]. The Decree of the President of the Republic of Uzbekistan of 20 November 2025 raises the ambition further: 20 million foreign tourists a year, a rise in tourism's share of GDP from 3.5% to 7%, and annual tourism exports above US$6 billion by 2030 [5].

Growth on this scale tests the physical base of the sector. In the planning literature, infrastructure (transport, accommodation, utilities and information services) is treated as a precondition of destination development that must be planned together with attractions, not as its by-product [1]. Prideaux shows that the accessibility and cost of the transport system can either accelerate the development of a destination or cap it [2]. When demand outruns this base, the usual results are congestion in a few centres, declining service quality and the loss of high-spending segments.

The aim of this thesis is to identify the main problems of tourism infrastructure development in Uzbekistan and to substantiate ways of overcoming them. The study uses data of the National Statistics Committee, the Tourism Committee and Uzbekistan Airports for 2017–2026 and applies comparative, structural and dynamic analysis.

Main Part

1. Demand growth versus infrastructure supply

Inbound demand has grown faster than the infrastructure that serves it. Arrivals rose from 1.88 million in 2021 to 11.68 million in 2025, and in January–September 2026 they reached 10.31 million, 20.4% more than a year earlier

(Figure 1) [6]. The structure of demand is specific. Kyrgyzstan, Tajikistan and Kazakhstan together supplied 8.69 million trips, or 74% of 2025 arrivals [6]. In January–July 2025, 68.7% of visitors came to visit relatives and only 15.0% travelled for leisure [6].

Supply has expanded quickly in quantity. Over the past eight years, US$6.5 billion of domestic and foreign investment created about 130,000 hotel beds [10], and the number of accommodation facilities grew almost ninefold since 2017 (Table 1).

Table 1. Selected indicators of tourism infrastructure and its performance in Uzbekistan

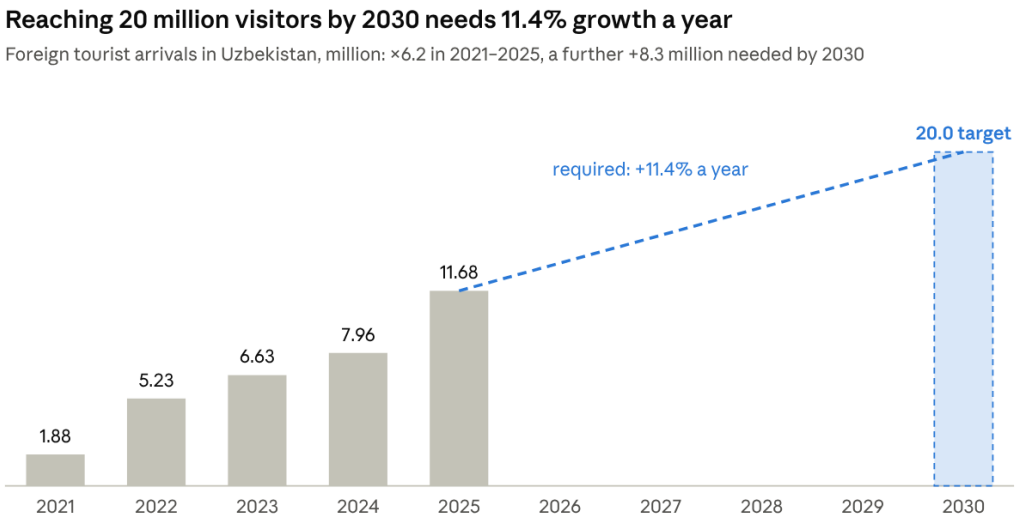
Indicator	Base value (year)	Latest value (year)	Change	Source
Accommodation facilities, units	767 (2017)	6,861 (Nov 2025)	×8.9	[6; 7]
Airport passenger traffic, million	10.0 (2023)	15.5 (2025)	+55%	[8]
International and domestic air routes, units	167 (2023)	206 (2025)	+23%	[8]
Aircraft fleet of resident airlines, units	54 (2022)	114 (H1 2026)	×2.1	[8]
Exports of tourism services, US$ billion	3.5 (2024)	4.8 (2025)	+37%	[7; 10]
Tourism exports per foreign visitor, US$	440 (2024)	411 (2025)	−6.5%	author's calculation from [6; 7; 10]
Hotel occupancy, %	51.1 (H1 2024)	53.4 (H1 2025)	+2.3 p.p.	[9]

Source: compiled by the author.

Table 1 reveals three imbalances. First, capacity grows in small units: with 6,861 facilities and about 183,900 places in November 2025 [7], the average facility holds only 26.8 places. Second, revenue per visitor fell by 6.5% in 2025: arrivals grew faster than visitor spending, so volume growth is not yet turning into higher-

value tourism. Third, hotel occupancy stays near 53% [9], so almost half of the room stock is idle over the year, which is typical of a strongly seasonal destination.

2. The 2030 target and the capacity gap



National Statistics Committee of Uzbekistan, 2021–2025 [6]; 2030 target: Presidential Decree of 20.11.2025 [5]

Figure 1. Foreign tourist arrivals in Uzbekistan, 2021–2025, and the 2030 target, million.

Source: compiled by the author from [5; 6].

Reaching the target requires a further 8.3 million visitors, or average growth of 11.4% a year in 2026–2030 (Figure 1). The pace itself is not the main risk: arrivals grew by 46.8% in 2025 and by 20.4% in the first nine months of 2026 [6]. The risk is capacity. The Tourism Committee plans to raise accommodation capacity from 185,600 places to 240,000, or by 29%, and to double the number of hotels under international brands [7]. Because the Decree also aims to attract more high-

spending visitors, who stay in hotels rather than with relatives [5], capacity planned at less than half the pace of demand risks peak-season shortages and higher prices.

3. Key problems of tourism infrastructure development

The analysis identifies five interrelated problems.

Spatial concentration. Tourism infrastructure is concentrated in Tashkent and in the Samarkand–Bukhara–Khiva triangle. Tashkent airport alone accounts for nearly two-thirds of all passengers and flights in the country [8]. Yuldashev's content analysis of foreign travellers' reviews shows that these three historic cities have the best infrastructure and steady state support, while peripheral areas with high potential (Tudakul reservoir, the Nurata and Zarafshan ranges, Surkhandarya, Jizzakh, the Fergana Valley) remain underequipped [4]. Pilgrimage tourism is still at an early stage despite its large potential [3]. Regional implementation also lags: by April 2025 only one capsule-housing site had been opened, in Kitob district, while 35 other districts and cities had not acted [10].

Structural mismatch of the accommodation stock. Growth has come mainly from small units of about 27 places each (Table 1), whereas the 2030 strategy requires doubling the number of four- and five-star hotels [5] and of hotels under international brands [7]. Operators report a shortage of qualified staff, especially in the luxury segment [9]. This mismatch limits the country's ability to attract the high-spending visitors the Decree targets.

Transport connectivity gaps. In 2025 the President pointed to tourists' complaints about highways and internal roads in Khorezm, Bukhara, Kashkadarya and Surkhandarya regions and ordered repairs of the "tourism belt" roads [10]. Domestic aviation carried only about 1.4 million passengers a year, and connections between international and domestic flights through Tashkent are poorly coordinated [8]. Travellers also cite night-time arrivals of international

flights, long waits for domestic connections, shortages of air and rail tickets and high airfares [4]. In Prideaux's terms, such access costs are a direct brake on destination development [2].

Seasonality and low utilisation. Average hotel occupancy of 53.4% in the first half of 2025 [9] indicates that much of the capacity stands idle outside the peak months. All-season products, such as the ski resort under construction at Oltin Bel in Parkent district, are only beginning to appear [10].

Weak digital and service readiness. In April 2023 Uzbekistan ranked 104th of 190 countries for mobile internet speed and 89th for fixed broadband, which is critical for independent travellers who book and navigate online [4]. Reviews also note low English proficiency among transport and service staff, a lack of first-aid posts at tourist sites and poor street lighting [4]. In 2025 businesses had to upgrade 784 public sanitation facilities, which indicates the size of the backlog in basic visitor amenities [7].

Conclusions and Recommendations

Tourism infrastructure in Uzbekistan has grown rapidly in quantity but not in balance. Demand has outpaced the quality, spatial reach and connectivity of supply, and the gap widens under the 2030 targets: arrivals must rise by 71%, while planned accommodation capacity rises by 29%. Following the integrated planning approach [1], the following measures are proposed:

1. **Spread infrastructure beyond the historic triangle.** Fund "tourism belt" roads, regional airport terminals and the new Bukhara airport as one programme, ranked by visitor flows, and use public–private partnership models such as the one applied at Samarkand airport [8].

2. **Rebalance the accommodation stock.** Direct tax and credit incentives to mid-size three- to five-star hotels in regional centres under international management contracts, and keep guesthouse growth under a mandatory quality classification.
3. **Integrate transport.** Introduce a single electronic ticket with through check-in via Tashkent [8], allocate daytime slots to long-haul flights, sell combined air–rail tickets and offer loyalty or cashback schemes on airfares for independent travellers [4].
4. **Reduce seasonality.** Develop MICE venues, mountain and winter resorts and an all-year events calendar, supported by off-season pricing.
5. **Raise digital and service readiness.** Extend 4G/5G coverage along tourist routes, install multilingual signage and audio guides, place first-aid posts at major sites and expand language and hospitality training.
6. **Monitor infrastructure against demand.** Publish an annual capacity balance by region that links arrivals to beds, seats and transport capacity, and collect structured feedback from independent travellers [4].

Taken together, these measures would shift the policy focus from the number of arrivals to the capacity, quality and reach of infrastructure, which is the condition for reaching 20 million visitors and US$6 billion of exports by 2030 [5].

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