

Connectivity, Tourism, And Diversification: An Assessment Of Central Asia as an Emerging Market

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Abstract

This paper examines the links between connectivity, tourism, and economic diversification in Central Asia, focusing on the region's transformation from historical isolation to an emerging market at the crossroads of global tourism. Using secondary data and sectoral case studies, the study analyzes how investments in tangible connectivity (physical infrastructure such as railways, roads, and airports) and intangible connectivity (regulation, digital technologies, and public policies) support tourism growth, foster regional integration, and contribute to overall economic development. By examining policy reforms, visa streamlining, and digital transformation, the research assesses these factors through a comparative analysis of national tourism trends, including visitor numbers, revenue, and infrastructure investment. The findings demonstrate a rapid post-pandemic recovery, a significant increase in international and domestic tourist flows, and substantial progress in diversifying tourism products. However, persistent obstacles such as inconsistent service quality, inadequate infrastructure, high travel costs, and the lack of a unified regional brand continue to hold back the sector. The study concludes that strategic investments in communication, collaborative regional marketing, and sustainable management are essential for Central Asia to become a competitive, resilient, and diversified tourism hub.

Key words: Central Asia, Regional connectivity, Tourism development, Diversification.

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1. Introduction

Despite its strategic importance and its crucial location on trade routes connecting East and West, Central Asia has suffered from historical isolation due to challenging geography and its political legacy. The region's surroundings by vast deserts and high mountains, as well as its landlocked nature, naturally isolated it from maritime trade routes and made transportation difficult for much of its history. The isolated nature of the region does not at all diminish its strategic location potential as Central Asia represents a promising market in today's global business and investment landscape, serving as an important hub for trade and tourism that connects Europe, Asia, and the Middle East. Geopolitically, Central Asia lies at the heart of Eurasia, connecting East and West, North and South. Its location makes it a natural crossroads for historical routes such as the Silk Road and contemporary trade routes and transportation corridors, such as the Middle Corridor, CAREC, and TRACECA. This strategic importance is the main reason for the competition over the region among superpowers. This geopolitical and competitive importance is exemplified in Halford Mackinder's Heartland Theory. Mackinder argues that the "Heartland," a vast region of Eurasia encompassing much of Central Asia, was key to controlling the world's political destiny. He described the central landmass of Eurasia, which covers much of Central Asia, as the "pivot zone" or "Heartland" of global power, and Central Asia lies at its heart. A perspective that was refreshed by Zbigniew Brzezinski in his book "The Grand Chessboard", as he positioned Central Asia at the center of Eurasia (Ismailov & Papava, p. 85). Today, this competition has served the region's openness and economic diversification through initiatives like China's Belt and Road Initiative, the Russian-led Eurasian Economic Union aiming to create a single Eurasian market, and the European Union's "Global Gateway" investment plan (Zipatolla, 2025).

In fact, since gaining independence from the Soviet Union, the Central Asian republics have emerged as promising business hubs, fostering openness and increasing global economic engagement. These developments underscore the region's role as a center for connectivity and financial cooperation, with significant implications for sustainable growth and stability. Within this perspective, this study aims to draw a comprehensive picture of the emergence of the Central Asian market. While doing this, the study chose to focus on tourism as a tool and a sign of economic diversification, as it stimulates the growth of various industries, including, but not limited to, hospitality, food services, transportation, entertainment, and retail. Additionally, investment in the tourism sector also supports transportation infrastructure and encourages other supply chains. In other words, tourism can serve as the locomotive for different economic sectors. The study chose to focus on connectivity because it is the main link between tourism, trade, transport, and industry. The study aims to explain how investment in and improvement of connectivity can enhance the region's tourism appeal and, consequently, support economic diversification and sustainable growth. In fact, the countries of the region have invested heavily in developing their infrastructure, from railways and highways to modern airports, making them more accessible and attracting more tourists from neighboring countries and around the world. This new connectivity has facilitated access to historic Silk Road cities, natural wonders, and urban centers, making the region an attractive destination for those seeking

authenticity, cultural exchange, and adventure. Connectivity plays a key role to unlock the region potential in tourism by reducing costs, increasing accessibility, and stimulating economic growth through advanced transportation networks and technology. Global economic integration is important for cultural exchange and sustainable development. Examining the impact of increased connectivity on tourism, particularly in Central Asia represents important tool to measure the growth in the region. Key elements include transportation networks, railway systems, regulatory frameworks, and visa policies. Ongoing infrastructure projects and policy reforms demonstrate the countries' willingness to deepening integration and inclusive development. The term "connectivity" refers to the systems and infrastructure that facilitate the movement of people, goods, services, and information across borders. It consists of three main elements; **Hard Connectivity** or physical connectivity refers more to transportation and logistics infrastructure such as roads, railways, airports, ports, and corridors that connect production and consumption centers. **Soft connectivity** includes regulatory connectivity, which involves aligning legal and institutional frameworks to support cross-border activities, such as customs facilitation, visa policies, digital trade systems, and integrated transport and data flows. Digital connectivity, on the other hand, refers to technological networks and platforms, including broadband internet, mobile communications, and data exchange systems, that connect businesses, governments, and consumers (OECD, 2018, p. 19; Russell, 2019, p. 2).

All of those aspects together are essential for promoting international tourism. The question here is how connectivity serves sustainable economic development by facilitating tourism. From an economic integration perspective, Béla Balassa, in his influential work "The Theory of Economic Integration," emphasizes that connectivity is fundamental to achieving it. According to Balassa, economic integration begins with removing barriers to mobility, enabling the free movement of goods, services, capital, and people between economies. In this context, connectivity, supported by transport networks, regulatory coordination, and institutional cooperation, becomes a vital element in the integration process (Balassa, 2011, p. 2).

For a landlocked region like Central Asia, improving connectivity is the first step toward integration because enhancing connectivity facilities, such as port efficiency, customs procedures, the regulatory environment, and the adoption of e-tourism, will stimulate tourism flows, consequently, supports sustainable economic growth and inclusive human development. Accessibility, infrastructure, and policy environments are important motivations for tourism growth. In this context, accessibility, infrastructure, and policy frameworks are key drivers of tourism development. As global tourism continues to grow, establishing effective connections between destinations, improving transportation infrastructure (such as airports and rail networks), and removing administrative barriers through visa-free travel, e-visa systems, and open space agreements are vital to enhancing destination competitiveness, improving tourist mobility, supporting major tourist destinations, and ensuring the sustainability of local communities. In his important work, "The Tourism Destination Lifecycle", Butler highlights the connectivity's key role in expanding a destination's reach and stimulating tourism growth. However, he also

addresses sustainability and conservation concerns (Hwang, 2017). In addition, according to the World Tourism Organization, destinations with good air connectivity see a 10% increase in international tourism compared to those with limited connectivity (Greenwood, 2025).

In the Central Asian context, regional cooperation initiatives, such as joint marketing strategies and the proposed unified “Silk Road Visa” enhance the region’s attraction in the tourism market. However, the connectivity’s concept in tourism expands beyond mere transportation; it represents the core idea of travel and tourism: connecting people with diverse places, cultures, and experiences. This is particularly evident in emerging trends stemming from the digital revolution, such as the growing influence of digital influencers and bloggers, as well as the increasing interest in culinary diversity.

The main objectives of this research are:

- To assess the role of connectivity, encompassing physical, regulatory, and digital dimensions, in the growth and economic diversification of the tourism sector in Central Asia;
- To analyze investments in transport and infrastructure in the region, as well as their impact on national and international tourist flows;
- To evaluate policy reforms (including visa facilitation and collaborative regional marketing) and their effectiveness in improving the global attractiveness and accessibility of Central Asian destinations;
- To identify emerging trends in product diversification, such as heritage tourism, ecotourism, adventure tourism and health tourism, and their contribution to regional competitiveness;
- To identify the ongoing challenges facing the tourism sector in Central Asia, such as gaps in infrastructure, service quality, sustainability, and branding, and to develop evidence-based recommendations for sustainable and coordinated regional tourism development.

2. Conceptual and Theoretical Framework and Methodology

At the core of this essay lies a multidisciplinary conceptual framework that integrates political geography, economic integration theory, and principles of tourism development to explain the rapid transformation of Central Asia. The region is analyzed as a strategic crossroads (the “Heartland” per Mackinder, and the Eurasian chessboard per Brzezinski), transitioning from historical isolation to a dynamic hub for global tourism. Building on Balassa’s economic integration theory, the framework posits connectivity, encompassing complex infrastructure (roads, railways, airports), soft regulatory integration (visa facilitation, open skies, harmonized policy), and digital transformation (broadband, mobile networks, digital marketing)—as the primary driver of both tourism growth and economic diversification in landlocked Central Asia. These elements shape accessibility, reduce friction, improve destination competitiveness, and foster cross-border movement of people and goods, in line with contemporary models of regional economic development.

Furthermore, the framework incorporates Butler's destination lifecycle theory to connect destination maturity, branding, and sustainability concerns to infrastructure and policy benchmarks. Connectivity and integration are not only viewed as facilitators for tourist flows and investment but also as mechanisms to expand social and cultural exchange and promote inclusive economic growth. Particular emphasis is placed on regional collaboration, especially multi-country initiatives (such as proposed Silk Road-type visas), unified marketing, and joint investments, which have proven essential in unlocking cross-border tourism and overcoming historical and practical barriers to diversification in Central Asia.

This study fills a particular gap in the Central Asian literature, where existing research on tourism and diversification is often either broadly geopolitical or narrowly descriptive, focusing on individual aspects such as transportation or visa policy without systematically integrating the region's physical, organizational, and digital dimensions connections. Drawing on geopolitics, economic integration theory, and destination lifecycle methodologies, this study contributes to the existing body of knowledge by proposing a unified conceptual framework that links Hartland-type geopolitical positioning, Balassa's integration logic, Butler's destination evolution, and the specific mechanisms through which connectivity influences tourism development and economic diversification in landlocked Central Asian countries. Instead of providing just a narrative overview, the analysis employs this framework to interpret structured secondary data and comparative evidence on incoming tourist numbers, revenues, infrastructure investments, and product diversification, moving beyond mere description. From this perspective, this study formulates and examines a series of analytical predictions: countries with more advanced infrastructure in terms of physical, organizational, and digital connectivity will experience stronger tourism growth, higher tourism revenues, and a greater variety of tourism products, while less-connected and more-restricted countries will fall behind. Although the study does not claim to establish a causal relationship, by systematically analyzing whether observed regional patterns match these predictions, it makes a theoretically and empirically supported contribution to the emerging literature on connectivity and diversification tourism in Central Asia.

Methodology

The methodology is based on a structured review of secondary data and policy documents combined with comparative descriptive analysis across the five Central Asian republics.

Scope and Comparative Case Study

The study concentrates on Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan, which collectively form the conventional definition of Central Asia as a regional subsystem. Within this group, the analysis specifically emphasizes Kazakhstan, Uzbekistan, and Kyrgyzstan, where data on connectivity and tourism indicators are more comprehensive and recent. Countries of Central Asia are examined side by side, using comparable indicators such as international arrivals, tourism revenues, visa openness, air and digital connectivity metrics, and major infrastructure investments to highlight similarities and disparities in connectivity, tourism infrastructure, and policy reform over time. The comparison

is descriptive and interpretive, aiming to identify patterns that align with the conceptual expectations of the study rather than establishing causal effects.

Descriptive Analysis of Secondary Data

The research relies on secondary data, including international tourist arrivals, tourism revenue estimates, infrastructure investment figures, and macroeconomic growth indicators drawn from national statistical offices, international organizations, and sector reports. These data are examined descriptively over the period 2000–2025 to trace broad trends in connectivity and tourism performance and to situate recent developments, including the effects of the COVID-19 shock, within longer-term patterns.

Policy and Institutional Review

The study systematically assesses regulatory frameworks (visa regimes, airline policies, digital integration), drawing on government documents, regional cooperation initiatives (CAREC, TRACECA), and policy think tank assessments.

Content Analysis

Reports, scholarly articles, and market assessments are critically examined to distill lessons about barriers (infrastructure gaps, regulatory fragmentation, service quality) and solutions (streamlined bureaucracy, collaborative marketing, standardized service).

Thematic Synthesis

Findings are synthesized around major themes, connectivity as a lever for tourism, tourism as a stimulus for diversification, the role of regional cooperation, and the sustainability challenge, linking these insights to practical recommendations.

Limitations

The study is subject to several limitations. First, the quality, coverage, and periodicity of tourism and connectivity data differ across countries, which constrains strict comparability of indicators and time series. Second, some key variables (such as tourism revenues and visitor composition) are only available for selected years or from different sources, requiring cautious interpretation of cross-country differences. Third, because multiple policy reforms and external shocks overlap in time, the analysis cannot isolate the causal impact of specific measures; it focuses instead on plausibly associated patterns.

Analytical Insight

This design makes it possible to relate different forms of connectivity and policy intervention to observable tourism and diversification outcomes in a systematic way, while remaining explicit about the descriptive and non-causal character of the evidence.

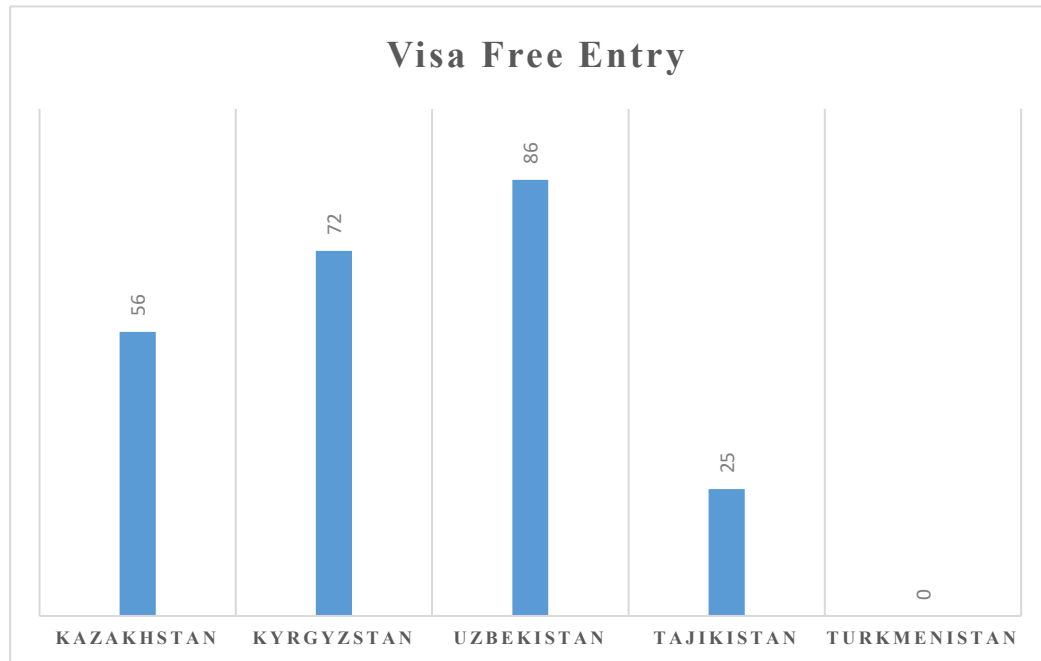
3. State Of Connectivity in Tourism Sector

3.1. Regulatory Connectivity: Visa Regulations and Openness

Tourism regulations and visa policies are important for strengthening connectivity in Central Asia and affect the growth of international travel and tourism. Open visa policies and streamlined border control procedures facilitate travel, attract more visitors, and enhance the region's global appeal. Over the past decade, Central Asian countries have eased entry requirements to attract tourists and promote economic cooperation. Contrary to the common perception about the isolation of

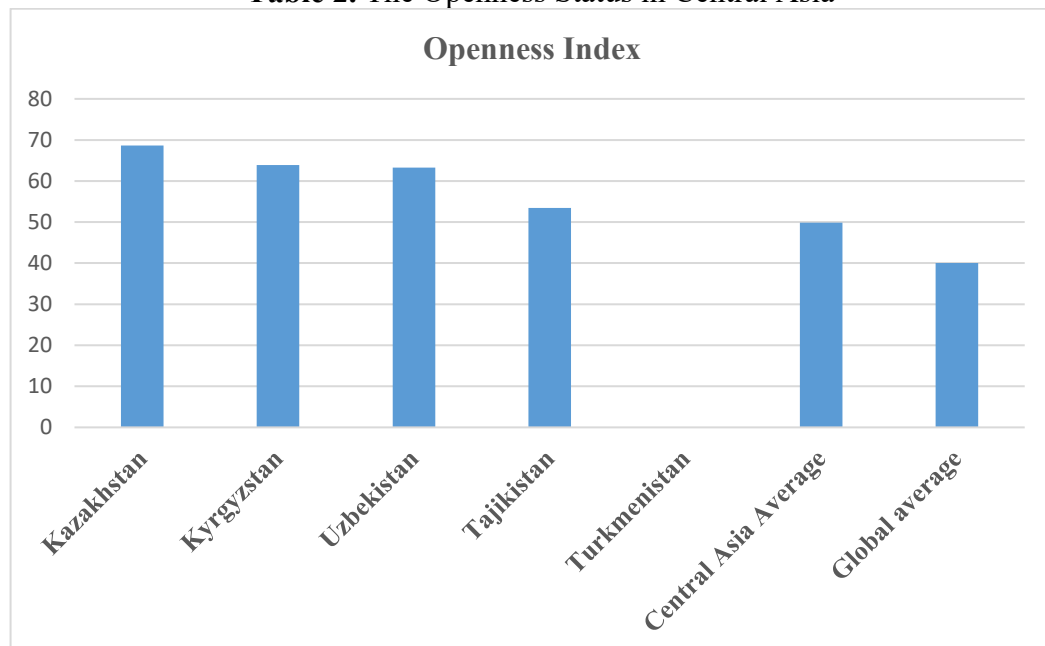
the Central Asia republics due to its Soviet Past, data show that, except for Turkmenistan, their average openness rates are higher than the global average.

Table 1. The Status of Visa in Central Asia



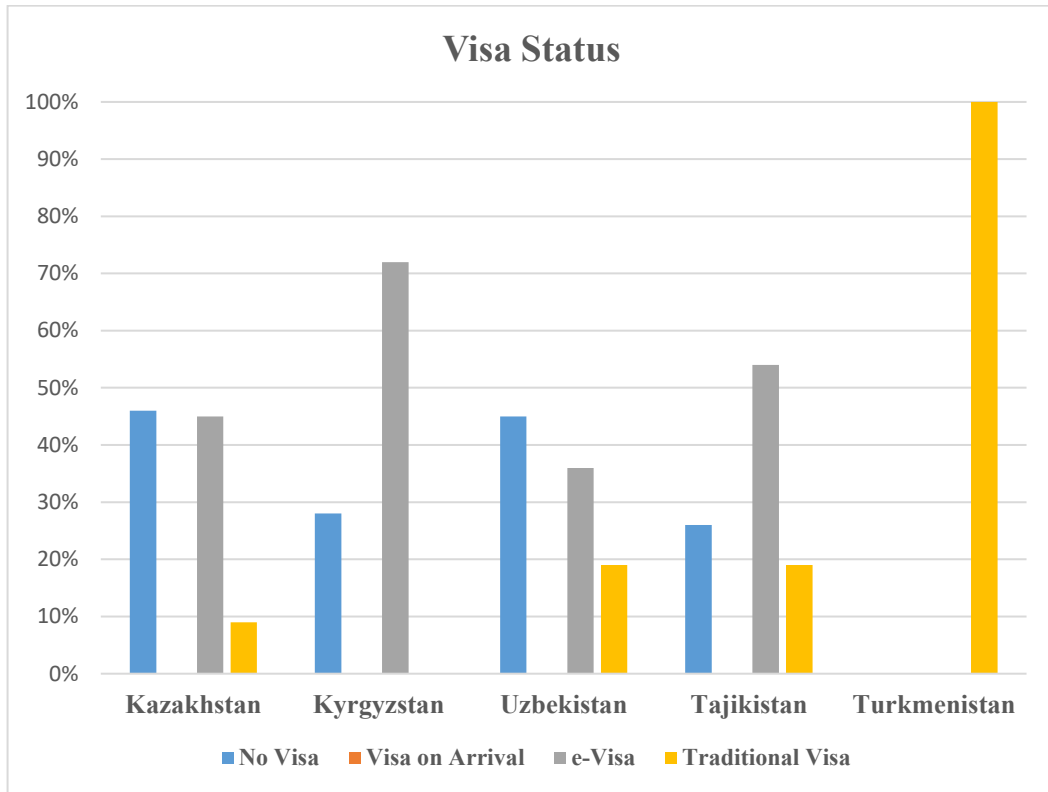
Source: (Central Asian Development Institute, 2023), (The Caspian Post, 2025), (kyrgyzstan-tourism.com, n.d.), (MFA of the Republic of Tajikistan, 2024), (State Migration Service of Turkmenistan, n.d.).

Table 2. The Openness Status in Central Asia



Source: UNWTO Tourism Visa Openness Report 2023 (UNWTO, 2023, p. 48).

Table 3. The Status of Visa in Central Asia



Source: UNWTO Tourism Visa Openness Report 2023 (UNWTO, 2023, p. 48).

The data above shows that Kazakhstan, Kyrgyzstan, and Uzbekistan have adopted a visa facilitation approach providing e-visa policies for many countries. This development has enhanced regional accessibility and supported tourism growth. These reforms have facilitated travel for tourists and business travelers and strengthened the region's integration into international mobility networks. Conversely, Tajikistan and Turkmenistan still maintain restrictive entry policies.

At the national level, today Uzbekistan acts as a regional role model by offering a policy to citizens of 86 countries (Central Asian Development Institute, 2023, p. 22). This policy has made Uzbekistan a model of tourism liberalization in the region. This reform has enhanced the country's international reputation, and strengthened its appeal as a tourism hub in Central Asia. Kazakhstan also became an open and attractive tourist destination in Central Asia, gradually easing visa restrictions to encourage travel, business, and foreign investment. By 2025, the country had achieved increased tourist accessibility, allowing visa-free entry to citizens of 56 countries, and staying in Kazakhstan visa-free for up to 30 days per visit, and a total of 90 days within any 180 days (The Caspian Post, 2025).

Kazakhstan also implemented a visa exemption policy for Chinese tourists in 2023, a sign of the country's willingness to promote openness, which led to a 78% increase in arrivals in 2024 (Sakenova, Tourist Numbers from China to Kazakhstan Surge 78% in 2024, 2025). Kyrgyzstan also achieved good results in promoting tourism by implementing a visa exemption program for citizens of many countries. This extensive visa exemption allows travelers from most parts of Europe, Asia, and beyond to enter the country without a visa, with the permitted

length of stay varying according to the country of origin. Kyrgyzstan has also implemented an efficient e-visa system, simplified the application process and allowed tourists to obtain their visas online. The combination of visa exemption, e-visa options, and ongoing efforts aims to increase openness and promote international mobility (kyrgyzstan-tourism.com, n.d.).

On the other hand, the strict visa policies of Tajikistan and Turkmenistan install rigid obstacles to the regional connectivity. Tajikistan grants visa-free access to only 25 countries, none of them Central Asian countries, which hinders regional integration. Moreover, Turkmenistan comes at the end of the list of openness as one of the most closed countries in the world, requiring visas for almost all travelers, including those from neighboring countries (UNWTO, 2023, p. 48). Strict visa requirements in Tajikistan and Turkmenistan represent an obstacle for the fluidity of regional mobility and economic cooperation. To motivate regional connectivity, in March 2025, the President of Kyrgyzstan proposed a single visa regime for Central Asia, allowing foreigners to move freely throughout the region. He encouraged Kazakhstan, Tajikistan, Turkmenistan, and Uzbekistan to ease visa requirements between their countries and to introduce a Schengen-style visa for international visitors. Dariga Nazarbayeva also launched a similar initiative, dubbed the “Silk Visa,” in 2018. Although initially supported by Kazakhstan and Uzbekistan, and having attracted the interest of Kyrgyzstan and Tajikistan, this initiative was never implemented (Fergana News, 2025).

3.2. Digital Connectivity

Digital connectivity refers to the quality and accessibility of digital infrastructure, enabling the electronic data exchange and communication, which is vital for modern economies, social interactions, and governance. Central Asia has increased its investment in broadband infrastructure, mobile network coverage, and digital public services. A World Bank report ranks the region among the top performers globally in telecommunications investment (World Bank, 2023, p. 47). Kazakhstan, Uzbekistan, and Kyrgyzstan are once again at the top of the digital transformation and connectivity in the region. These countries have made notable progress in building digital infrastructure, particularly in the area of high-speed mobile networks. This progress includes the large-scale deployment of 4G networks and the early launch of 5G networks, especially in Kazakhstan (GSMA, 2024, p. 8). The report also ranks Kazakhstan among the upper-middle-income countries that have seen significant growth in their IT services exports since the pandemic (World Bank, 2023, p. 35).

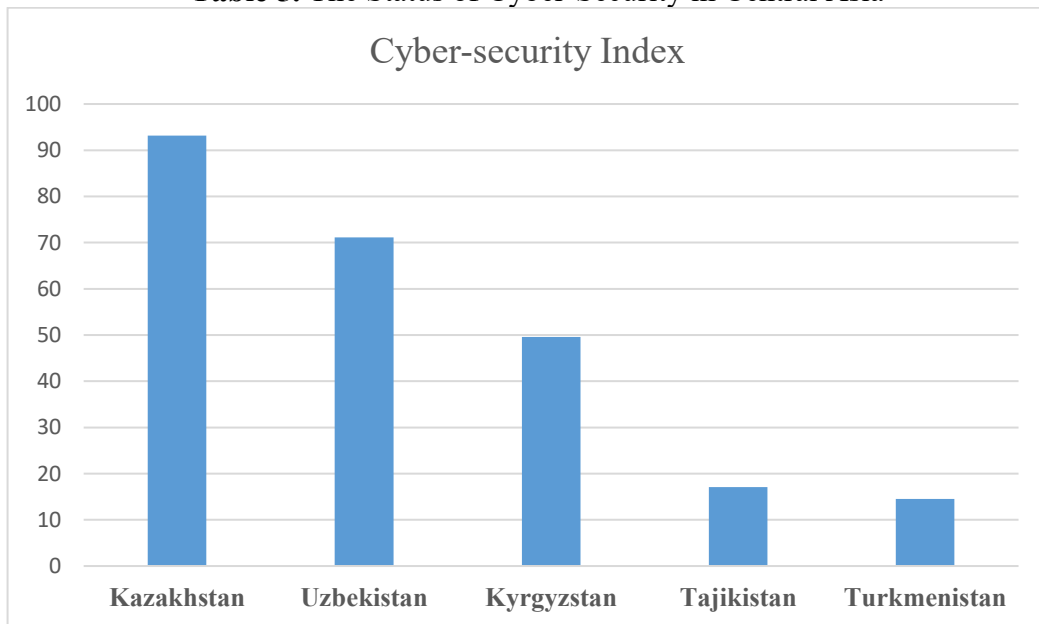
Table 4. The Status of Internet Speed in Central Asia

Country	Global Rank	Fixed Broadband	Global Rank	Mobile
Kazakhstan	90	81.55	46	94.05

Uzbekistan	75	87.38	74	55.44
Kyrgyzstan	87	82.81	79	51.56
Tajikistan	121	39.97	-	-

Source: Speed Test Global Index (SpeedTest, 2025).

Table 5. The Status of Cyber-Security in Central Asia



Source: Global Cybersecurity Index (SESRIC, 2024, p. 65).

In fact, the countries who have already improved their transport and regulation connectivity are also the ones developing their network infrastructure. Again, the situation in Tajikistan and Turkmenistan remains a major challenge for digital connectivity in the region, as these countries lag behind. Despite the recent progress, Central Asia continues to face key obstacles in the digital connectivity due to slower integration into the digital transformation process than other regions, particularly rural and disadvantaged areas. These areas suffer from limited infrastructure and prohibitive costs, exacerbating the digital divide. A report by the European Investment Bank indicates that approximately 1,600 villages in Central Asia have no internet access whatsoever. The vast areas, the mountainous terrain, and the high costs of infrastructure make it difficult to extend fiber optic networks outside of cities (EIB, 2025, p. 25). While some Central Asian countries have moderate internet penetration rates, the region as a whole remains below the global average, and slow connections diminish the benefits of digitalization. Furthermore, the quality, cost, and availability of digital services are significant obstacles, which

explains Central Asia’s lag in global development, particularly in terms of access to online educational resources and video content (Zehir & Odabaşı, 2025, pp. 4,5).

3.3. Air Connectivity

Central Asia’s air connectivity is undergoing a significant transformation process due to regional integration efforts, economic diversification, and increased foreign investment. Over the past decade, the region has seen improvements in its transport infrastructure. The region already enjoys a vast infrastructure of airports with approximately 50 international and regional airports. This vast air transport infrastructure enhances the region’s connectivity capacity and, consequently, its tourism appeal.

Table 6. The Status of Air Connectivity in Central Asia

Country	Main International and Regional Airports in Central Asia
Kazakhstan	Aktau International Airport, Aktobe International Airport, Almaty International Airport, Nursultan Nazarbayev International Airport (Astana), Atyrau Airport, Shymkent International Airport, Sary-Arka Airport (Karaganda), Kokshetau International Airport, Kostanay Airport, Kyzylorda Airport, Oral Ak Zhol Airport (Uralsk), Oskemen Airport (Ust-Kamenogorsk), Pavlodar Airport, Petropavl Airport (Petropavlovsk), Semey Airport (Semipalatinsk), Taldykorgan Airport, Taraz Airport, Hazrat Sultan International Airport (Turkistan), and Zhezkazgan Airport.
Uzbekistan	Andizhan (Andijan) Airport, Bukhara International Airport, Fergana International Airport, Karshi Airport, Namangan Airport, Navoiy International Airport, Nukus Airport, Samarkand International Airport, Islam Karimov Tashkent International Airport, Termez Airport, Urgench International Airport, and Zarafshan Airport.
Kyrgyzstan	Manas International Airport (Bishkek), Osh Airport, Issyk-Kul International Airport (Tamchy), Karakol International Airport, Batken Airport, Jalal-Abad Airport.
Tajikistan	Dushanbe International Airport, Khujand Airport, Kulob Airport, Bokhtar International Airport, Khorog Airport, and Isfara Airport.
Turkmenistan	Ashgabat International Airport, Balkanabat Airport, Dashoguz International Airport, Kerki International Airport, Mary International Airport, Turkmenbashi International Airport, and Turkmenabat International Airport.

Source: open data

Moreover, in recent years, air connectivity in the region has recorded notable progress towards regional and international connectivity. Kazakhstan is making a great progress in modernizing its airport infrastructure, which is a key

factor in Kazakhstan's success in tourism. Kazakhstan hosts several international and regional airports, such as Almaty, Astana (Nursultan Nazarbayev), Aktau, Shymkent, Karaganda, Atyrau, and Aktobe, along with numerous smaller regional airports, enabling optimal connectivity across Kazakhstan's large territory. This extensive air transport network has played a vital role in the development of tourism and improved regional accessibility (ecer freight, n.d.). Shymkent Airport recently inaugurated a new terminal, increasing its annual capacity from 800,000 to 6 million passengers. Plans also include expanding runways and developing multimodal hubs. These investments will enable Kazakhstan to meet the growing demand for international travel and improve connectivity in Central Asia and beyond (Pokidaev, 2025).

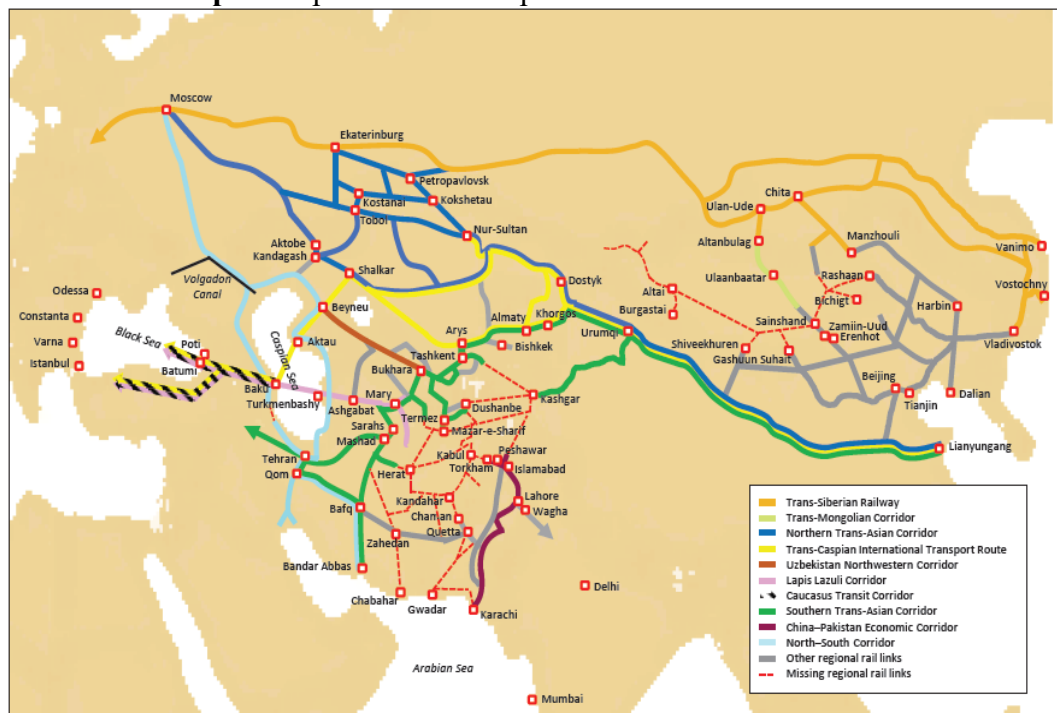
Uzbekistan also recorded a major transformation success with the construction of the new Tashkent International Airport, which is expected to become the largest airport in Central Asia. Tashkent International Airport currently handles 9 million passengers annually. This expansion of the air network, significant investments in airport infrastructure, and the arrival of numerous foreign airlines, combined with airport modernization and increased flight capacity, are improving international accessibility and transforming the region into a more attractive and accessible destination. Central Asia's unique geographical position fuels the growth of transit flights, and positions Central Asia as a promising transport and tourism hub. Improved connectivity not only facilitates access to key destinations but also fosters regional tourism cooperation. This cooperation enables the creation of multi-country travel packages that allow visitors to explore several countries in a single trip. This improved connectivity is essential to fully realizing the region's tourism potential, stimulating economic growth, diversifying the tourism offering, and attracting a broader international clientele. These developments reinforce Central Asia's growing reputation as a tourism hub capable of delivering excellent travel experiences through optimal connectivity and modern infrastructure.

3.4. Rail Connectivity

Besides air travel, rail transport plays a vital role in tourism. Modern new railway lines offer faster and more affordable access to major cities and cultural sites for both regional and international travelers. In a region as vast as Central Asia, a high-performing rail network is essential for connecting the historic Silk Road cities, mountain resorts, and UNESCO World Heritage sites. Major rail lines will facilitate the development of cross-border tourist routes along the Silk Road, allowing visitors to travel easily through several countries by train, enriching their experience and extending their stay. This not only lengthens tourist trips but also revitalizes rural areas by promoting rural tourism, ecotourism, and encouraging families to visit regions without airports. Furthermore, as many popular tourist destinations are located inland or in remote areas, road and rail links are essential for accessing. The region has an extensive network of railways and roads, which represents an important part of the larger Eurasian Transport Network. This network includes various routes, such as the Northern Eurasian Corridor, the Transport Corridor Europe-Caucasus-Asia (TRACECA), the International Trans-Caspian Transport

Route (TITR/Middle Corridor), and the International North-South Transport Corridor (INSTC).

Map 1. Map of Main Transport Corridors in Central Asia



Sorce: (CAREC, 2021, p. 6).

The most important route is the Trans-Caspian International Transport Route (TITR), often named as the Middle Corridor, a multimodal corridor connecting Southeast Asia and China to Europe, passing through Kazakhstan, the Caspian Sea, Azerbaijan, and Georgia. This route, the shortest route between Western China and Europe, was established to improve the flow of goods and provide an alternative to the Northern Russia route. Officially launched in 2013, TITR serves as a common platform for countries and companies along the New Silk Road (TITR, n.d.). Kazakhstan's railway system, stretching over 16,000 kilometers, is the largest in the region and serves as a vital land bridge between China, Russia, the Caspian Sea, and Europe. Its main domestic railway lines connect key cities and ports, such as Aktau–Kuryk, Zetygin–Altyntkol, and Aktogai–Almaty–Astana, as well as connecting Kazakhstan to vital international corridors (Ekaterina, 2025).

The Dostyk–Alashankou railway was the first direct railway link between China and independent Central Asia, establishing Kazakhstan as a hub for the Northern Eurasian Corridor and trade between China and Europe (www.newscentralasia.net, 2025). Other railway lines, such as the Lianyungang-Kazakhstan railway and the Khorgos- Altyntkol railway, further strengthen Kazakhstan's role as a major Eurasian rail freight hub, connecting Central Asia to European and Asian markets (Foundation, et al., 2019). This integrated network strengthens Kazakhstan's position as a key Eurasian connector for the East-West and North-South corridors, acting as a local integrator and a major international

transportation hub. Although Uzbekistan's railway network is smaller than Kazakhstan's, at approximately 7,000 kilometers, its potential is primarily focused on passenger transport and tourism. Uzbekistan has Central Asia's only high-speed railway, the Afro-Syb, which connects Tashkent, Samarkand, Bukhara, and, soon, Khiva, providing modern and comfortable services to residents and visitors (Cynthia, 2025). A key Uzbek railway route is the East-West Corridor, connecting key Silk Road heritage cities and stimulating both domestic and international tourism, particularly for travelers seeking direct access to UNESCO World Heritage sites.

North-south lines and cross-border connections to Afghanistan and Kazakhstan also facilitate trade and cross-border travel. The developed domestic railway system plays a significant role in Silk Road tourism, making it easier for visitors to travel between Uzbekistan's major destinations (CAREC, n.d.). Unlike Kazakhstan and Uzbekistan, Turkmenistan, Kyrgyzstan, and Tajikistan have smaller railway networks that are mainly focused on their interior regions; they provide slow and limited passenger services and have a modest tourism impact, but they are important for regional connectivity and access to neighboring countries; tourism in these countries relies more on road and air transport, with railways primarily supporting domestic travel and cross-border routes. Analysis of the railway network reveals that Central Asia's railway system is predominantly freight-focused, with passenger service often limited and irregular. However, this freight-dominated system remains a strategic resource, serving as a backbone for expanding "Silk Road" tourism and improving passenger access. As planned corridors progress and modernization continue, these railway improvements are expected to support tourism growth, connect new destinations, and enhance the region's economic diversification.

4. Impact of Enhanced Connectivity on Tourism

There is no doubt that the improvement of the connectivity structure had a positive impact on tourism sector in the Central Asia in the last years. In 2024, the tourism data from Central Asia showed that countries that focused on improving connectivity attracted significantly more visitors. Kazakhstan leads the region with 15.3 million tourists, followed by Uzbekistan (10.2 million), Kyrgyzstan (8.9 million), and Tajikistan (approximately 1.5 million). Those figures might indicate that investment in connectivity infrastructure, in its various aspects, can enhance the appeal and attractiveness of tourism. On contrary, countries like Tajikistan, which have progressed more slowly in terms of connectivity, remain behind their neighbors in attracting international tourists (Eurasian Research Institute, 2025). In general, five Central Asian republics welcome between 30 and 35 million tourists annually, generating approximately \$6.5 billion in tourism revenue. Kazakhstan receives \$2.6 billion, Kyrgyzstan \$250 million, Uzbekistan \$3.5 billion, and Tajikistan \$110 million (SESRIC, 2024, pp. 26,31).

Table 7. Tourist Arrivals in Central Asia

Country	Tourist Arrivals (2019)	Tourist Arrivals (2024)	Increase (percent)
Kazakhstan	8.51 M	15.3 M	79.79%
Kyrgyzstan	8.5 M	8.9 M	4.71%
Uzbekistan	6.75 M	10.2 M	51.11%
Tajikistan	1.04 M (2018)	1.5 M	44.23%
Approx. Total	24.8 M	35.9 M	44.76%

Source: Author’s calculations (approx.) based on World Bank and Global Tourism Forum Data

Table 9. Tourism receipts’ share of GDP in Central Asia

Country	Share in GDP (2019)	Share in GDP (2020)	Share in GDP (2022)	Share in GDP (2024)
Kazakhstan	5.2%	2.4%	3.9%	0.90%
Kyrgyzstan	9.6%	4.2%	3.9%	1.4%
Uzbekistan	5.2%	1.9%	2.1%	3.04%
Tajikistan	6.4%	3.4%	2.8%	0.71%
Average	6.6%	2.99%	3.18%	1.51%

Source: Author’s calculations based on JICA and Central Asian Development Institute Reports (JICA, 2022, p. 22; Central Asian Development Institute, 2023, p. 12)

Although tourism’s contribution to GDP has decreased compared to previous years, this does not necessarily indicate a decline in the value of the tourism sector; quite the contrary, as the tourist arrivals have increased than even pre-pandemic levels. The relative decrease in tourism's contribution to GDP is likely attributable to the strong economic growth experienced by these countries, rather than a decline in the sector itself. For example, Kazakhstan’s GDP increased from \$171 billion in 2020 to \$288 billion in 2024, while Uzbekistan’s grew from \$66 billion in 2020 to \$115 billion in 2024. Like other markets, the Central Asian tourism market has been impacted by the coronavirus pandemic. Nevertheless, they have recovered more quickly than some other Asian markets, such as Indonesia, which was also severely affected.

4.1. Assessment

Kazakhstan’s large investment in air connectivity has borne fruit as the tourism sector has experienced notable growth, welcoming approximately 15.3 million international visitors in 2024, reflecting the country’s willingness to raise tourist destinations’ attraction. This tourism boast generated over US\$2.6 billion in foreign exchange earnings and annual revenues exceedingly approximately US\$965 million, creating over 500,000 direct jobs and showing an annual growth rate of 5 to 8 percent. Investments in tourism infrastructure also saw an increase, reaching

947.5 billion tenge in 2024. In 2024, Kazakhstan welcomed a diverse international clientele, including 655,000 Chinese and 307,756 Russian visitors, thanks to its visa-free policy and the increase in the number of direct flights. India followed with 146,000 visitors, benefiting from simplified visa procedures and improved air service (Eurasian Research Institute, 2025). 130,000 visitors from Türkiye, while 92,000 from Germany received. Forty thousand tourists from South Korea arrived seeking nature and cultural experiences. Kazakhstan also recorded a significant 62% increase in tourists from Arab countries, demonstrating its growing global appeal and the success of its efforts to diversify its tourism markets (Global Tourism Forum, 2025).

The data shows that Uzbekistan is a remarkable example of tourism success in Central Asia, not only regionally but also globally. Despite superior connectivity and a higher annual visitor count for Kazakhstan, Uzbekistan consistently records the highest tourism revenue in Central Asia. This success demonstrates that tourism revenue growth relies not only on infrastructure development but also on promotional policies and strategic partnerships. Uzbekistan's efforts to build a unique and distinctive brand have paid off. The country is positioning itself as a culinary tourism destination, highlighting its UNESCO World Heritage-listed Uzbek pilaf and its internationally recognized emphasis on high standards and hygiene in its local cuisine. These campaigns, combined with dynamic media partnerships and international events, have attracted a growing number of Western travelers. Crucially, Uzbekistan has leveraged its exceptional heritage, particularly the historic cities of Bukhara, Samarkand, and Khiva, to promote heritage tourism. Attracted by these profound cultural and historical experiences, heritage-seeking tourists are generally less price-sensitive and willing to pay more for authentic, high-quality experiences. This factor mainly explains why Uzbekistan surpasses other Central Asian republics in terms of tourism revenue. Uzbekistan, the heart of the ancient Silk Road, is rapidly transforming into a major global tourist destination. The country passes through a momentum of tourism due to its investment in transport infrastructure and its open visa policies, as it welcomed 10.2 million international tourists in 2024, generating \$3.5 billion in revenue, a 50% increase over the previous year. This momentum continued into 2025, with 4.2 million international visitors arriving in the first five months alone. This represents a 48.2% year-on-year increase and 1.4 million more tourists than in the same period in 2024.

These impressive results demonstrate the effectiveness of tourism reforms implemented in Uzbekistan and its growing international appeal. The tourism boom of 2025 is also attributable to strong growth in neighboring countries, including Kyrgyzstan, Tajikistan, and Kazakhstan, and illustrates the success of regional connectivity strategies and the country's openness. The largest number of visitors came from Kyrgyzstan, with over 1.28 million visitors, almost double the figures for 2023. Tajikistan ranks second with 993,700 visitors, followed by Kazakhstan with 889,600. Russia remains a key source market with 334,300 visitors, while arrivals from China more than quintupled to 51,900. Turkey, India, and Italy, in particular, saw significant growth, demonstrating Uzbekistan increasing international appeal. These results are the fruit of ambitious policies: simplified visa regimes and expanded visa-free access have considerably improved international accessibility.

Furthermore, substantial investments in airports, roads, and accommodation, including more than 6,100 new hotels and 161,000 beds planned by 2024—have significantly enhanced the visitor experience. Among its Central Asian neighbors, Uzbekistan has been particularly successful in attracting Western tourists, registering faster growth in arrivals from countries such as the United Kingdom and Italy. Targeted marketing, simplified entry procedures, and a strong focus on the quality of infrastructure and services all contribute to this growth (Global Tourism Forum, 2025). The Uzbek tourism sector has achieved remarkable success thanks to a variety of innovative initiatives. The “Travel to Uzbekistan!” campaign generated a record 22.7 million domestic trips in 2024, demonstrating strong local interest in the country’s heritage. Internationally, Uzbekistan’s profile has been enhanced through marketing partnerships with organizations such as the BBC, CNN, and National Geographic, as well as targeted initiatives like “The Year of Uzbek Tourism in China.” In addition to promoting its iconic Silk Road cities, the country is actively developing sustainable and eco-friendly travel options. New sectors, such as gastronomy and wellness tourism, are also experiencing significant growth.

Uzbekistan’s commitment to quality and traveler trust is reflected in the adoption of an international tourism protection law, which has solidified its reputation as one of the safest destinations in the world. The Tourism Strategy 2040 presents an ambitious plan to establish Uzbekistan as a leading global destination. This plan aims to develop accommodation infrastructure, increase the number of travel agencies, and intensify marketing efforts in key markets such as the United States and China. It also envisions organizing major cultural events in China and the CIS countries, and increasing the average length of stay for international visitors to 10-12 days. This long-term vision is based on strategic reforms to highlight Uzbekistan's rich cultural heritage and foster sustainable growth, thereby ensuring continued success in the global tourism market (Global Tourism Forum, 2025).

Kyrgyzstan is rapidly transforming into an attractive tourist destination thanks to proactive government efforts to diversify travel options and streamline visa procedures. In 2024, the country welcomed 8.9 million tourists, 400,000 more than the previous year. This significant increase generated \$45 million in tourism revenue for the first half of the year alone. By early 2025, the total benefit of the tourism sector had reached \$230 million, demonstrating sustained growth. Public investments include 40 new tourism infrastructures and initiatives to improve accessibility, sustainability, and the visitor experience. Kyrgyzstan's success is largely due to its connectivity, particularly with visitors from neighboring countries such as Uzbekistan, Kazakhstan, and Russia. There has also been an increase in visitors from Europe and the Middle East, highlighting the country's growing international appeal. Community-based tourism programs support this growth by offering authentic cultural experiences while boosting local economies and rural communities. Overall, significant government support for tourism infrastructure, facilitating border crossings, and comprehensive development strategies has enabled significant progress in Kyrgyzstan's tourism sector (Global Tourism Forum, 2025).

Tajikistan’s tourism sector is experiencing modest growth compared to its Central Asian neighbors. In the first nine months of 2024, the country welcomed over 1.2 million foreign visitors, a 19% increase (195,600 additional tourists) compared to the same period of the previous year (TAJSTAT, 2024). A positive dynamic has been established with a view to 2025; the number of tourists increased by 31% during the first half of the year compared to the same period of the previous year (Asia-Plus, 2025). The majority of those arrivals came from neighboring countries, primarily from CIS countries, followed by Russia, Kazakhstan, and Kyrgyzstan. Of all those arrivals, only 8.6% (104,700 people) were from non-CIS countries, highlighting the government's need to strengthen its international presence and influence (TAJSTAT, 2024). The capital, Dushanbe, remains the main tourist destination, attracting 60% of foreign tourists, which underlines the need to improve access to rural areas (Kazinform News Agency, 2025). Turkmenistan, one of the world’s most isolated destinations, holds immense untapped tourism potential. Its capital, Ashgabat, offers visitors a unique urban experience thanks to its stunning white marble architecture. The country’s rich cultural heritage is showcased at sites along the ancient Silk Road, including the UNESCO World Heritage-listed ruins of Merv. Nature lovers are drawn to the spectacular Darvaza gas crater, often called the “Gates of Hell,” as well as the country’s diverse landscapes, which range from deserts to the shores of the Caspian Sea. Tourists can also immerse themselves in the still-vibrant local culture and traditions. Despite these assets, Turkmenistan’s tourism sector remains modest, welcoming only a few tens of thousands of visitors annually, making it one of the world's most closed-off destinations.

5. The Potential, Trends, and Opportunities of the Tourism Sector in Central Asia

Central Asia undeniably represents a promising tourism market, as evidenced by its continued growth, increasing visitor numbers, and simplified entry procedures. Its tourism potential lies in its wealth of resources spread across various sectors.

5.1. Thematic Tourism Trends

The region possesses a wealth of natural and historical sites, making it an important tourist destination. This unique potential supported growth in thematic tourism such as heritage and cultural tourism, adventure, rural tourism, and ecotourism and even culinary tourism.

Table 10. UNESCO-registered Sites in Central Asia

Country	UNESCO-registered Sites
Kazakhstan	Mausoleum of Khoja Ahmed Yasawi, Petroglyphs of the Archaeological Landscape of Tanbaly, Saryarka – Steppe and Lakes of Northern Kazakhstan, Silk Roads: the Routes Network of Chang'an-Tianshan Corridor, Western Tien-Shan, Cold Winter Deserts of Turan.

Uzbekistan	Itchan Kala, Historic Centre of Bukhara, Historic Centre of Shakhriyabz, Samarkand – Crossroad of Cultures, Western Tien-Shan, Cold Winter Deserts of Turan, Silk Roads: Zarafshan-Karakum Corridor.
Kyrgyzstan	Sulaiman-Too Sacred Mountain, Silk Roads: the Routes Network of Chang'an-Tianshan Corridor, Western Tien-Shan.
Tajikistan	Proto-urban Site of Sarazm, Tajik National Park (Mountains of the Pamirs), Silk Roads: Zarafshan-Karakum Corridor, Tugay forests of the Tigrovaya, Balka Nature Reserve, Cultural Heritage Sites of Ancient Khuttal.
Turkmenistan	State Historical and Cultural Park “Ancient Merv”, Kunya-Urgench, Parthian Fortresses of Nisa, Cold Winter Deserts of Turan, Silk Roads: Zarafshan-Karakum Corridor.

Source: UNESCO

5.1.1. Heritage Tourism Trend

The region is experiencing a boom in cultural and heritage tourism, fueled by numerous heritage sites, including UNESCO World Heritage sites that bear witness to the rich history of Central Asia, a crossroads of civilizations along the ancient Silk Road. Renowned sites in Uzbekistan, such as Samarkand, Bukhara, Khiva, and Shahrisabz, attract international cultural tourists seeking unique and immersive experiences through their magnificent Islamic architecture, historic fortresses, religious schools, and mausoleums. In Kazakhstan, the mausoleum of Khoja Ahmed Yesevi reflects the grandeur of Timurid architecture and has profoundly shaped the region. Transnational Silk Roads: the Chang'an-Tianshan Corridor road network traverses Kazakhstan and Kyrgyzstan, linking numerous iconic sites that tell the story of centuries of vibrant cultural and commercial exchange (Central Asian Development Institute, 2023, pp. 15,16).

5.1.2. Surge in Ecotourism

Beyond its rich cultural heritage, the region's landscapes offer an extraordinary balance of contrast and harmony, ideal for adventure and ecotourism. The Western Tian Shan Biosphere Reserve, spanning Kazakhstan, Kyrgyzstan, and Uzbekistan, is a major biodiversity hotspot and actively promotes sustainable tourism in Central Asia. Kyrgyzstan is home to the magnificent Issyk-Kul Mountains, one of the world's largest high-altitude lakes, renowned for its tranquility and breathtaking beauty. In Tajikistan, the majestic Van Mountains and their seven lakes offer wild and unspoiled landscapes, perfect for hiking and nature exploration. Furthermore, rural tourism initiatives, such as “yurt stays”, enrich the community travel experience by supporting local economies and offering a unique glimpse into traditional ways of life. These original travel options diversify the region's tourism offerings and attract a niche clientele seeking unique, personalized and culturally respectful experiences.

5.1.3. Culinary Tourism in Uzbekistan

Gastronomy and culinary tourism are also experiencing strong growth. Uzbekistan is particularly renowned for its cuisine, notably its Uzbek pilaf, a UNESCO World Heritage dish internationally recognized for its flavor and cultural significance. Culinary tourism enriches the traveler's experience by connecting them to local culture in an authentic and tasty way.

5.2. Tourism Diversification

A major trend in Central Asian tourism is the rapid growth of domestic tourism, which has increased by an average of 30% following the COVID-19 pandemic, fueled by a renewed local interest in spas, leisure activities, ecotourism, and mountain tourism (www.statista.com, n.d.). At the same time, countries are embracing digital technologies: online platforms and social media play a significant role in promoting regional destinations, enabling more effective and targeted communication with both domestic and international travelers. However, these innovations are often implemented independently, and strengthened marketing collaborations could help build a stronger brand for tourism in Central Asia. Tourism in the region is also experiencing significant diversification with the increasing development of hiking trails, ski resorts, parks, and wellness centers. These new offerings promote more sustainable and environmentally friendly travel options, supporting adventure tourism, ecotourism, and wellness tourism (Central Asian Development Institute, 2023, p. 10). This diversification responds to the growing demand for niche markets and personalized experiences.

5.3. Ongoing Investments

Besides its natural and historical assets, ongoing investments in the region's tourism sector promise a bright future, as Central Asian countries are revitalizing tourism through infrastructure improvements, including the construction of new accommodations and visitor centers, and upgrades to transportation. The goal is to enhance the overall travel experience and meet the diverse needs of both domestic and international visitors (Central Asian Development Institute, 2023, p. 10). For example, Kazakhstan has invested in 181 new projects, valued at over 1.1 trillion tenge, which are underway and expected to be completed by 2027 to sustain this momentum. As a result, Kazakhstan is positioning itself as a leading and rapidly expanding tourist destination in Central Asia (Global Tourism Forum, 2025). Kazakhstan has also launched an ambitious plan to strengthen its air connectivity with the Horizon Master Plan, the largest airport development project in its history. This strategic development program aims to make Almaty International Airport a major air transport hub in Eurasia by 2050. The project is financed by a \$60 million main loan from the European Bank for Reconstruction and Development. The Horizon Master Plan comprises five phases, scheduled for completion by 2050, and anticipates an annual capacity of 40 million passengers (Sakenova, Almaty Launches Largest Airport Modernization Project, 2025; EBRD, n.d.). In addition to Almaty, the Ministry of Transport signed a \$1.1 billion investment agreement with the Emirati Company Terminals Holding to expand and modernize Nursultan Nazarbayev International Airport (NQZ) and surrounding infrastructure in Astana.

This project includes expanding runways and passenger terminals, as well as creating a comprehensive airport city that integrates logistics, commercial, and hotel facilities to meet the growing demand for passenger and cargo services. The agreement supports Kazakhstan's overall strategy to attract foreign investment and position itself as a major transit hub between China, Russia, and Central Asia (Casey, 2025). In Uzbekistan, the country aims for 24 million passengers annually by 2040; therefore, President Mirziyoyev officially launched the project to build a new airport in Tashkent on October 15, 2025. This project will be carried out as a public-private partnership led by the Saudi Arabian company Vision Investment Company, in collaboration with the Japanese company Sogitz and the South Korean company Incheon International Airport Company. The project will ensure the smooth flow of passenger traffic to and from the airport, underscoring Uzbekistan's ambition to become a central air hub connecting East and West. The new airport is expected to be completed in 2028 and will have a capacity of 20 million passengers per year, with more than 40 flights per hour (Birbayeva, Tashkent Launches Construction of Central Asia's Largest Airport, 2025; Clark, 2025).

6. Challenges and Barriers for Tourism Sector in Central Asia

Despite the high potential that the region has, there are still challenges that hinder the tourism growth.

6.1. Insufficient Infrastructure

Despite the region's economic dynamism, tourism infrastructure remains insufficient to meet the expected number of visitors. The lack of hotels, roads, and reliable transportation in many destinations, particularly in rural and remote areas, limits traveler accessibility and comfort. This problem is exacerbated by the limited capacity of major airports despite significant investment. Furthermore, as analysis of the regional railway network reveals, most lines are used for freight transport, while very few serve passengers. Uzbekistan is the only country in the region with a high-speed railway line. This presents a significant obstacle to tourism development, especially considering the high cost of airfares (Shamsiddinova, 2025, p. 785).

6.2. Seasonality and Overtourism

Central Asia, being landlocked and with few direct international flights, is often subject to high airfares, limiting access. This limited access, together with its poor infrastructure, concentrates tourism in capital cities and airport areas, leading to overtourism in major cities, while rural areas remain sparsely visited. Another reason for overtourism is the seasonality, as visitor numbers peak during the short spring and summer months, leading to overcrowding in popular tourist destinations and significant environmental pressure. Meanwhile, infrastructure is underutilized during the low season, resulting in lost tourism revenue (Eurasian Research Institute, 2025).

6.3. Skills and Capacity Shortages and Service Quality Gaps

The sector faces a shortage of trained staff and limited capacity-building programs, which restrict its ability to offer modern, high-quality tourism experiences and to adapt to changing international trends. There is also a lack of international language proficiency among the workforce, aside from Russian. This matches the fact that hospitality and customer service levels vary greatly across the region. Many operators struggle to meet international standards, resulting in inconsistent visitor experiences and discouraging repeat visits (Central Asian Development Institute, 2023, p. 1).

6.4. Low Competitiveness

The region's low competitiveness stems from several factors. First, limited access and high airfares reduce competition with rival destinations and deter budget-conscious tourists. Bureaucratic and regulatory hurdles, such as strict visa policies, the lack of multi-country visas, complex permit systems, drone bans, and land restrictions, particularly in Tajikistan and Turkmenistan, also contribute to this weakness. These factors create real or perceived barriers for both tourists and investors. Furthermore, a lack of institutional support and coordination exacerbates the situation. Weak or fragmented industry associations mean that local tourism businesses lack institutional support and face high costs and risks when entering regional markets. Weak competitiveness also stems from inadequate marketing policies and a lack of brand identity, as Central Asian countries often manage their marketing activities independently. The lack of a common, collaborative brand strategy hinders their global presence and prevents them from capitalizing on the opportunities offered by cross-border and multinational tourism (Central Asian Development Institute, 2023, p. 1). The region will need to develop a common brand identity for Central Asia that will foster the development of standardized tourism offerings and support diversified and balanced tourism activities.

6.5. Sustainability Deficiencies

There are numerous challenges and threats to the sustainability of the tourism sector in the region, the most significant being security threats. The region faces recurring security challenges, such as border disputes, political uprisings, violent labor unrest, and ethnic violence. Furthermore, there are security threats from neighboring countries, such as Afghanistan and Iran, in addition to the risks stemming from power struggles and arms races among the major powers (Kantarci, Uysal, & P. Magnini, 2015, p. 5). Combined with inadequate crisis preparedness, all these factors increase the anticipated and actual risks to travelers and investors in this sector. Another important threat to sustainability is overtourism, as weak environmental regulations and mismanagement of cultural heritage sites make them more susceptible to damage, especially during periods of heavy tourist visitation (Kantarci, Uysal, & P. Magnini, 2015, p. 18).

Conclusion

Central Asia's tourism sector is undergoing a radical transformation, driven by a strong post-pandemic recovery, a growing number of international and domestic visitors, and concerted efforts toward diversification and modernization. The region, with its unique geographical location at the crossroads of civilizations, its heritage along the Silk Road, its UNESCO World Heritage cities, and its diverse landscapes, continues to attract travelers, while the rapid spread of digital platforms and social media enhances its international reach and expands its presence. At the same time, despite weak coordination in regional branding and marketing strategy, leaving significant untapped potential, domestic tourism has seen remarkable growth since the pandemic, reflecting a renewed local interest in rural, wellness, and nature-based experiences. Within this overall positive trend, tourism patterns vary considerably from country to country. Kazakhstan has largely established itself as a transport hub, attracting numerous visitors thanks to massive investments in air and rail infrastructure, but its tourism revenue remains modest relative to its size. In contrast, Uzbekistan has surpassed its neighbors in tourism revenue and in its high-value cultural and culinary sectors, thanks to improvements in its transport network, simplified visa procedures, and the promotion of its cultural heritage and gastronomic reputation. Kyrgyzstan has established itself in ecotourism and community-based tourism, primarily driven by regional and domestic clientele, while tourism growth in Tajikistan remains modest and concentrated in the capital, heavily reliant on CIS markets. Turkmenistan possesses considerable potential, but this remains largely untapped due to its restrictive visa policy and limited openness.

At the same time, Central Asian countries are diversifying their tourism offerings beyond traditional attractions. Rural experiences, such as hiking trails, ski resorts, spas, and yurts, are revitalizing niche markets and providing sustainable travel options year-round. These innovations address challenges such as seasonality and the growing demand for personalized, environmentally friendly experiences that celebrate local cultures. Despite these advances, persistent obstacles are preventing the sector from reaching its full potential. Infrastructure deficiencies (particularly in rural areas), high travel costs, uneven service provision, visa and regulatory difficulties, and labor shortages remain major challenges. Threats such as seasonal fluctuations in demand, risks to the long-term sustainability of natural and historical sites, the limited capacity of small countries, and fragmented policy frameworks require urgent attention and collaboration. Furthermore, the current international context, marked by global economic instability and security concerns, increases the unpredictability of tourism trends at both the national and regional levels. However, positive developments are evident in regions where governments have taken proactive measures: cross-border policy reforms, investments in transport and accommodation infrastructure, and increased stakeholder engagement have contributed to sustainable economic growth and diversification of the tourism sector. Regional cooperation, particularly through shared visas, a unified brand identity, environmental initiatives, and joint infrastructure projects, is the most effective way to unlock Central Asia's immense tourism potential. In the future, Central Asia is well-positioned to become a major player in global tourism, not only

as a new destination for travel, adventure, and cultural exchange between East and West, but also as a model illustrating how heritage, innovation, and collaboration can strengthen regional prosperity, resilience, and international standing.

From a policy perspective, three strategic priorities emerge. First, coordinated regional initiatives such as multi-country visa programs and co-branding can improve the return on recent connectivity investments by encouraging multi-destination travel plans and strengthening Central Asia's role as an integrated tourism destination rather than a collection of separate markets. Second, targeted investments in secondary cities and rural infrastructure, especially in transportation networks, essential services, and digital connectivity, can reduce pressure on capital cities, increase the average length of stay, and transfer benefits to less developed regions. Third, ongoing efforts to improve skills, service quality, and digital marketing capabilities are crucial to ensure that enhanced physical and institutional connectivity leads to increased visitor spending, greater diversification of tourism products, and increased resilience to external shocks.

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