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Micro-Level Determinants of Tourism-Enterprise Competitiveness in Uzbekistan: Accommodation Quality Structure and the Service-Infrastructure Gap

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Abstract

Background: Macro-level competitiveness indices identify weak tourist-services infrastructure as a binding constraint on Uzbekistan's tourism competitiveness, yet the micro-level, enterprise-structure origins of this deficit remain unexamined.
Objective: This study aims to quantify the quality-certification structure of the accommodation stock across Uzbekistan's thirteen regional units, to test whether quality-classified supply is associated with inbound international demand, and to characterize the composition of the travel-trade intermediation base.
Method: A quantitative, descriptive-correlational, cross-sectional design was applied to secondary enterprise data for 2023 from the official registers of the Statistical Agency of the Republic of Uzbekistan, using descriptive statistics and Pearson and Spearman correlation analysis across regions.
Results: Only about 7 percent of the country's roughly 1,098 hotels hold any star classification, and four- and five-star properties are confined almost entirely to three heritage regions. The number of star-classified hotels is strongly associated with inbound demand ($r = 0.820$, $p < 0.001$, $n = 13$), while tour operators and travel agents are distributed very unevenly across regions.
Conclusion: The service-infrastructure deficit is fundamentally a quality-certification and enterprise-upgrading problem. Certification, upscale-segment development and a stronger tour-operator base are high-leverage, low-cost instruments for raising competitiveness and dispersing demand beyond the heritage core.

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INTRODUCTION

Tourism is one of the world's largest service industries and a significant engine of growth, employment and economic diversification, and a substantial body of evidence indicates that the economic benefits a destination derives from tourism depend on how competitive that destination is: more competitive destinations convert visitor flows into economic growth more effectively (Lasisi et al., 2025), and recent cross-country panel evidence confirms a robust long-run association between tourism development and broader economic development (Cárdenas-García et al., 2024).

For this reason, national tourism competitiveness is now routinely benchmarked by composite indices most prominently the World Economic Forum's Travel and Tourism Competitiveness Index and its successor, the Travel and Tourism Development Index whose construction, weighting and interpretation have generated a substantial methodological literature (Duro et al., 2024; Mendola & Volo, 2017). Scholars have nevertheless cautioned that such indices describe rather than explain competitive outcomes (González Rodríguez et al., 2023), and that meaningful evaluation requires disaggregation to the regional and enterprise scales at which tourism services are actually produced and consumed (Zhang et al., 2023).

Uzbekistan illustrates both the promise and the problem. Since 2016 the country has liberalized its visa regime, expanded international air access and invested heavily in tourism promotion, and government commitment to the sector remained visible even through the COVID-19 shock, when targeted guarantees and support measures were deployed to sustain tourism enterprises (Allaberganov et al., 2021). Inbound tourism has grown accordingly: in the 2023 reference year of this study, the thirteen regional units analysed here recorded approximately 10.8 million foreign-tourist visits between them, led by Samarkand (about 2.76 million), Bukhara (about 1.75 million) and Khorezm (about 1.14 million).

Yet this demand growth rests on a strikingly thin quality base. Of the roughly 1,098 hotels operating nationally in 2023, only 74 about 7 percent held any star classification, and the travel trade comprised about 2,650 tour operators and 1,036 travel agents distributed very unevenly across regions. It is therefore unsurprising that global assessments consistently rank tourist-services infrastructure among Uzbekistan's weakest competitiveness pillars.

Recent scholarship on Uzbek tourism has examined inbound tourists' demographics and travel motives (Allaberganov & Preko, 2022), the determinants of destination loyalty at the country's World Heritage Sites (Juraturgunov et al., 2023), and the sustainability challenges facing the Silk Road heritage cities (Karimov et al., 2025); what has not been systematically examined is the enterprise base that produces the services these visitors consume.

The conceptual foundation for such an examination is well established. In the destination-competitiveness frameworks reviewed by Dwyer, (2022); Xu & Au, (2023), the quality of supporting services and the capability of the tourism firms that deliver them mediate the conversion of a destination's resources into visitor value, and Albayrak et al., (2024) analysis of hotel attributes shows that the quality of tourism suprastructure accommodation above all directly shapes tourist satisfaction and destination competitiveness.

Algieri & Álvarez, (2023) demonstrated at the regional scale that indicators of the tourism supply, including infrastructure and heritage assets, are essential to explaining the ability of destinations to attract foreign tourists, and the empirical link between measured competitiveness and realized tourism performance has been validated, including for small island destinations (Kumar et al., 2022; Yamagishi et al., 2023).

The present study operationalizes these insights through the quality structure of the accommodation sector. A second strand of literature concerns service quality and performance at the level of the individual firm. The frontier and determinant analyses of Assaf & Josiassen, (2016); Pérez-Granja & Inchausti-Sintes, (2023) demonstrate that the efficiency and quality of tourism enterprises, not their mere quantity, separate high-performing from low-performing destinations, while the smart-tourism agenda locates competitiveness increasingly in the service capabilities of individual enterprises (O'Connor, 2023).

Within this strand, hotel star classification has attracted specific attention as a quality signal: evidence from Spain shows that classification systems reduce the information asymmetry facing visitors, although their informativeness depends on the consistency of the underlying standards Núñez-Serrano et al., (2014); evidence from four European hotel

markets shows that star category commands measurable price premiums Illescas-Manzano et al., (2023); and comparative work on guest evaluations confirms that star categories align broadly with perceived quality (Martin-Fuentes, 2016).

This literature motivates the present focus on certification and the upscale segment as observable, policy-relevant proxies for enterprise quality. A third strand links the structure of tourism supply to realized demand. The panel-cointegration and spatial-econometric evidence of Kuok et al., (2024); Liu et al., (2022) establishes that the quantity and quality of tourism-related infrastructure condition international tourist flows, and more recent work confirms that index-measured competitiveness translates into sector development and performance (Pavluković et al., 2026; Uyar et al., 2023).

The tourism-demand modelling literature likewise emphasizes that supply-side capacity and quality belong among the determinants of realized demand, alongside the income and price variables that dominate forecasting models (Song et al., 2023). Building on this strand, the present paper tests whether quality-classified accommodation supply is associated with inbound demand across Uzbek regions. Against this background, the research gap is specific.

The international literature establishes that enterprise-level quality matters for destination competitiveness, but it has been developed largely on European, American and East Asian cases; the emerging literature on Uzbekistan is demand-side and case-based; and no study has yet provided a quantitative, all-regions account of the tourism-enterprise structure that underlies Uzbekistan's weak service-infrastructure scores.

The gap is also urgent. Uzbekistan's national development strategy assigns tourism a priority role in regional development and job creation, large public and private investments in the sector are currently being allocated, and the post-pandemic recovery of Silk Road travel presents a window in which structural weaknesses either get corrected or become entrenched. Whether those investments raise competitiveness depends on precisely the enterprise-level structures certification, quality segmentation, intermediation capability that this paper measures.

The novelty of the study is accordingly threefold. First, it provides, to the author's knowledge, the first micro-level, enterprise-structure analysis of tourism competitiveness covering all thirteen regional units of Uzbekistan, extending a literature that has treated the country almost exclusively at the macro or single-city scale (Allaberganov & Preko, 2022; Juraturgunov et al., 2023; Karimov et al., 2025). Second, it connects a macro-level diagnostic (the weak tourist-services pillar in global indices) to its micro-level origins in the certification structure of the accommodation stock, thereby answering the call for explanation rather than description in competitiveness research (González Rodríguez et al., 2023).

Third, it quantifies, for the first time in the Uzbek context, the association between quality-certified supply and inbound international demand at the regional scale. The objectives of the research follow directly. The study aims to quantify the quality-certification structure of the accommodation stock across Uzbekistan's thirteen regions, including the size and location of the upscale (four- and five-star) segment; to test whether quality-classified accommodation supply is significantly associated with inbound foreign-tourist demand across regions; and to characterize the regional composition of the travel-trade intermediation base and identify the enterprise-level policy levers implied by the combined evidence.

The expected benefits are both academic and practical: academically, the study extends destination-competitiveness theory to a Central Asian transition economy at the enterprise scale on which the theory's mechanisms operate; practically, it gives policymakers a concrete, addressable target the quality-certification deficit in place of an abstract infrastructural shortfall, and identifies certification, upscale-segment development and operator capability as the levers on which enterprise policy can act. The remainder of the

paper follows the IMRAD structure: the next section sets out the research method, followed by the results and discussion, and the conclusion.

RESEARCH METHOD

Research type and design

This is a quantitative research study employing a descriptive-correlational design with a cross-sectional structure. The descriptive component characterizes the enterprise structure of Uzbekistan's tourism sector the accommodation stock, its quality certification, and the travel-trade composition across regions; the correlational component tests the association between quality-classified supply and inbound demand.

A cross-sectional design was chosen over a panel or longitudinal approach for two reasons: first, the research objective is structural characterization of the enterprise base at a common reference point, for which a single-year census of all regions is the appropriate instrument; second, consistent region-by-region classification registers have only recently become available, so a multi-year panel of comparable quality does not yet exist. The cross-sectional choice is revisited as a limitation in the Limitations and future research subsection.

Location, scope and reference period

The unit of analysis is the region. The study covers the thirteen regional units of the Republic of Uzbekistan the twelve administrative regions (viloyatlar) and the Republic of Karakalpakstan for the 2023 reference year. The capital, Tashkent City, is included in the national totals reported in the text but is treated separately from the thirteen regional units in the regional analysis, because its metropolitan, business-travel-oriented hotel market differs structurally from the regional tourism economies that are the object of this study.

Data sources

The study uses secondary data drawn from the official registers of the Statistical Agency of the Republic of Uzbekistan for 2023: the register of accommodation establishments, which records the number of hotels per region and their distribution across two-, three-, four- and five-star classification categories, and the register of travel-trade enterprises, which records the number of licensed tour operators and travel agents per region.

Inbound demand is measured by the number of foreign tourists received by each region in the same year, from the same agency's tourism statistics. The regional dataset was compiled, harmonized and cross-verified by the author in the course of Doctor of Science (DSc) dissertation research, with figures checked against the sectoral publications of the Ministry of Ecology, Environmental Protection and Climate Change's Tourism Committee to ensure consistency.

Instruments and data-collection technique

Because the study relies on secondary administrative data, the data-collection technique is documentation: the relevant register counts were extracted into a structured regional data matrix (region × indicator) using a uniform extraction template covering total hotels, classified hotels by star category, tour operators, travel agents and foreign-tourist numbers. No survey instrument was administered. All extracted values were double-entered and reconciled to eliminate transcription error.

Measures

Three enterprise-quality measures are constructed for each region. The quality-certification rate is the share of hotels holding any star classification classified hotels divided by total hotels. The upscale indicator is the count of four- and five-star properties, capturing the presence of an internationally competitive top segment. The intermediation composition is the ratio of tour operators to travel agents, distinguishing regions whose travel trade is oriented toward product creation from those oriented toward distribution. Inbound

demand is measured as the number of foreign tourists (in thousands) received by the region in 2023.

Data-analysis techniques

Two families of techniques are applied. First, descriptive statistics (counts, shares, rates and operator-to-agent ratios) characterize the regional distribution of each measure, presented in Table 1 and Figures 1, 2 and 4. Second, the association between quality-classified supply, measured as the number of star-classified hotels, and inbound demand is tested with the Pearson product-moment correlation coefficient across the thirteen regions (two-tailed test, significance threshold $\alpha = 0.05$), with the Spearman rank correlation computed as a robustness check against the influence of the largest regions.

To distinguish a quality effect from a pure market-size effect, the same procedure is repeated for the total number of hotels, the quality-certification rate and the number of tour operators. Tashkent City is excluded from all correlation analyses. All computations were performed in Python 3 using the SciPy statistical library, with Microsoft Excel used for data organization.

Data quality, validity and reliability

The validity of the analysis rests on the official character of the source registers, which are the legally mandated records of hotel classification and travel-trade licensing in Uzbekistan. Reliability was addressed by cross-verifying the register counts against independent sectoral publications for the same reference year and by double-entry reconciliation during compilation. Two caveats remain and are treated as limitations: the registers capture the formal, licensed enterprise structure and therefore exclude the informal accommodation sector, and administrative counts cannot capture unobserved quality differences within classification categories.

RESULT AND DISCUSSION

The quality-certification deficit

The first research objective was to quantify the quality-certification structure of the accommodation stock, and the headline finding is a pervasive quality-certification deficit. Nationally, of roughly 1,098 hotels only 74 — about 7 percent (6.7 percent) hold any star classification, leaving the overwhelming majority of the accommodation stock outside any recognized quality framework. Figure 1 shows that this deficit is near-universal across regions: seven of the thirteen regions fall below the national average, three regions (Kashkadarya, Jizzakh and Karakalpakstan) have no classified hotels at all, and the highest rate, 17.8 percent in Fergana, is recorded outside the heritage core. For an international visitor, the practical consequence is an accommodation market in which quality is largely unsignalled, a direct micro-level source of the weak tourist-services performance recorded at the macro level.

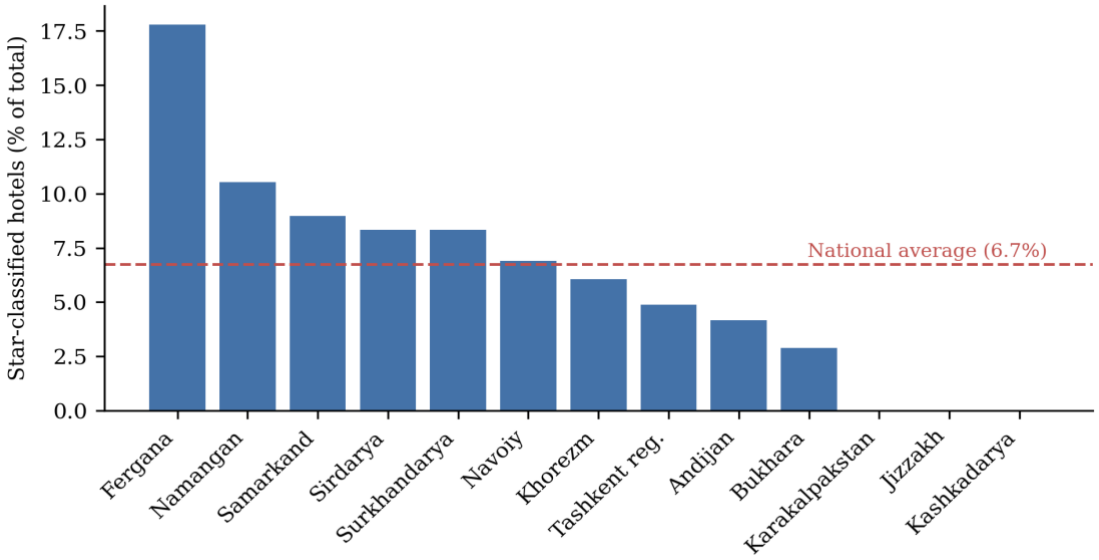

Figure 1. Share of hotels that are star-classified, by region; the dashed line is the national average.

The concentration of the upscale segment

The upscale segment is not merely small but spatially concentrated. As Figure 2 shows, four- and five-star properties are confined almost entirely to Samarkand, Bukhara and Khorezm, the heritage core, which together hold eight of the nine upscale properties in the regional sample (the remaining one is in Navoiy), while the great majority of regions have none. Star-classified accommodation of any grade is similarly concentrated: Samarkand and Bukhara alone account for 20 of the 44 classified hotels in the thirteen regional units. The implication is a two-tier accommodation geography: a thin layer of internationally graded supply in a few heritage cities, and an unclassified, quality-unsignalled base everywhere else. Table 1 reports the full regional data.

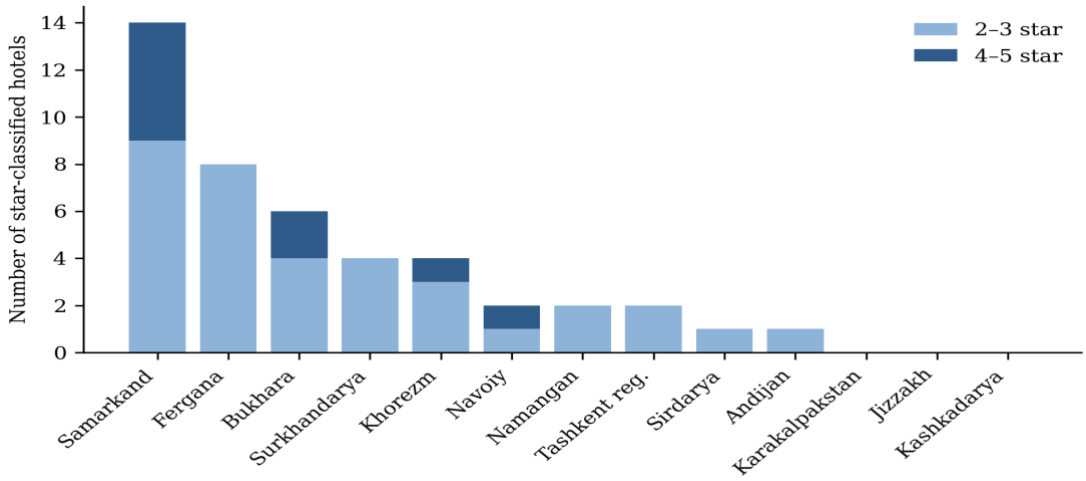

Figure 2. Distribution of star-classified hotels (2–5 star) by region.

Table 1. Enterprise structure and inbound demand by region, 2023 (source: Statistical Agency of the Republic of Uzbekistan). Tashkent City is excluded from the regional units; national totals cited in the text include it.

Region	Hotels	Classified	4–5★	Class. %	Operators	Agents	Foreign (000)
Samarkand	156	14	5	9.0	316	74	2,758
Bukhara	208	6	2	2.9	176	10	1,745
Khorezm	66	4	1	6.1	93	55	1,137
Tashkent region	41	2	0	4.9	124	42	1,104
Surkhandarya	48	4	0	8.3	51	11	712
Namangan	19	2	0	10.5	115	3	634
Kashkadarya	43	0	0	0.0	30	18	563
Andijan	24	1	0	4.2	58	110	500
Fergana	45	8	0	17.8	92	13	476
Jizzakh	28	0	0	0.0	29	18	452
Navoiy	29	2	1	6.9	68	4	420
Karakalpakstan	27	0	0	0.0	67	13	200
Sirdarya	12	1	0	8.3	21	8	114

Quality supply and inbound demand

The second research objective was to test the association between quality-classified supply and inbound demand. Figure 3 relates the count of star-classified hotels to the number of foreign tourists across the thirteen regions. The Pearson product-moment correlation is strong, positive and statistically significant: $r = 0.820$, $p < 0.001$ (two-tailed), $n = 13$. The association is robust to the choice of estimator, as the Spearman rank correlation is $\rho = 0.660$, $p = 0.014$, indicating that the relationship is not driven solely by the two largest heritage regions.

The supplementary checks, however, show that the total number of hotels is also strongly associated with inbound demand ($r = 0.848$, $p < 0.001$), whereas the quality-certification rate is not ($r = 0.080$, $p = 0.796$). Substantively, the regions that have developed a certified, quality-signalled accommodation segment, namely Samarkand, Bukhara and Khorezm, are precisely those that capture the largest international flows, while regions with no classified supply receive correspondingly modest inbound numbers. Although the cross-sectional design cannot separate cause from effect, the pattern is consistent with quality certification functioning as both a response to and an enabler of international demand.

The supplementary checks refine this reading: the association operates through the absolute size of the certified segment, which grows with the overall accommodation market, rather than through the share of certified hotels. Fergana, with the highest certification rate (17.8 percent), receives only about 476 thousand foreign tourists. Certification therefore appears to be a necessary but not sufficient condition for attracting international flows, and the certified segment is best regarded as the demand-relevant part of the accommodation base in regions that also possess strong heritage attractors.

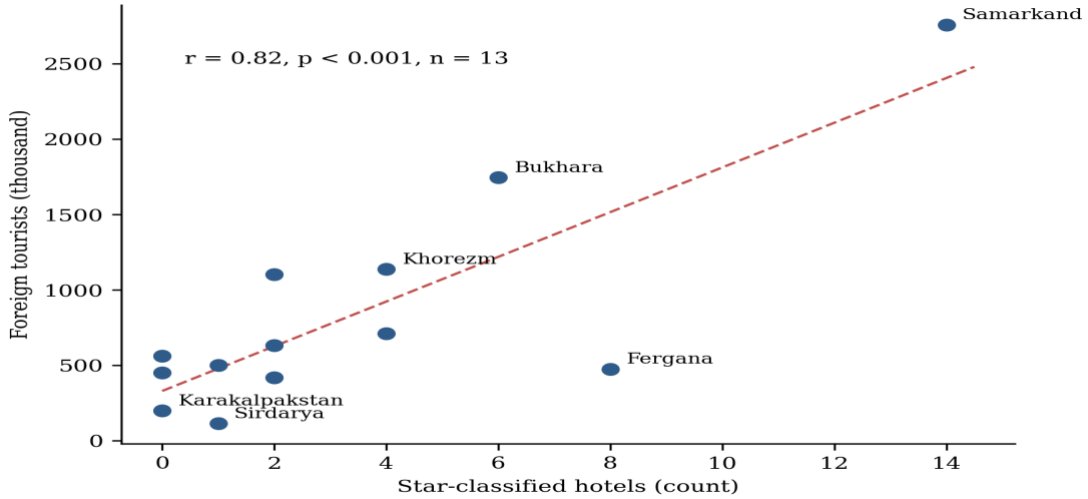

Figure 3. Star-classified hotels and foreign-tourist numbers across regions ($r = 0.820$, $p < 0.001$, $n = 13$).

The intermediation base

The third research objective concerned the intermediation base. The travel trade is dominated by tour operators over travel agents nationally (about 2,650 operators to 1,036 agents), but Figure 4 shows that this composition varies markedly across regions. Samarkand combines the largest operator base (316) with a developed agent network (74), and Khorezm shows a similarly balanced structure (93 operators and 55 agents), whereas Bukhara's large operator base (176) is served by only ten agents. Operator-to-agent ratios range from 0.53 in Andijan, the only region in which agents outnumber operators, to 38.3 in Namangan, while Sirdarya, Jizzakh and Kashkadarya have very thin intermediation sectors of either type.

The number of tour operators is strongly associated with inbound demand ($r = 0.936$, $p < 0.001$). A developed operator base is the enterprise capability that assembles and markets destination products to international markets, so its uneven distribution compounds the accommodation-quality deficit: regions weak in both certified supply and product-creating intermediation face a double micro-level constraint on competitiveness.

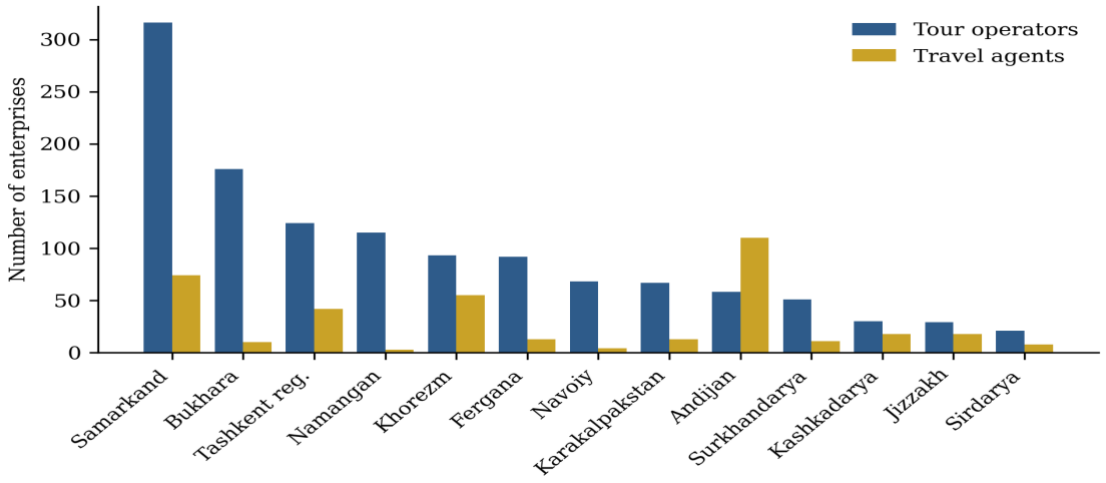

Figure 4. Composition of the travel trade (operators and agents) by region.

Discussion

Taken together, the results answer the three research objectives: the certification structure is quantified and shown to be deficient and spatially concentrated (objective 1), the certified-supply–demand association is established and statistically significant (objective 2), and the intermediation base is shown to be uneven in ways that compound the accommodation deficit (objective 3). The micro-level evidence thus supplies a concrete explanation for the macro-level tourist-services deficit.

A national accommodation stock in which only a small minority of hotels is quality-classified, and in which the upscale segment is confined to three heritage cities, is exactly the enterprise structure that would generate a low score on a service-infrastructure pillar. The macro index, in this reading, is not measuring an abstract infrastructural shortfall but aggregating a very specific micro reality: most tourism enterprises operate outside any recognized quality framework.

This reframes the service-infrastructure problem as a quality-certification and enterprise-upgrading problem. The findings bear directly on the theoretical frameworks reviewed in the Introduction. They confirm, for a Central Asian transition economy, the proposition, common to the frameworks reviewed by Dwyer, (2022); Xu & Au, (2023), that firm-level service capability mediates the conversion of destination resources into visitor value: Uzbekistan's heritage resources are world-class, yet inbound flows track the certified enterprise base rather than the resource endowment alone.

They extend the regional approach of Algieri & Álvarez, (2023) to a new institutional context, and they are consistent with the evidence of Albayrak et al., (2024) that hotel attributes are central to destination competitiveness. At the same time, the results challenge any reading of composite indices as self-explanatory: the service-infrastructure pillar's meaning in Uzbekistan is not missing hotels but missing certification, a distinction only enterprise-level data can reveal (González Rodríguez et al., 2023).

The regional contrasts sharpen this interpretation. Bukhara attracts the second-largest inbound flow with a certification rate of only 2.9 percent, whereas Fergana combines the highest certification rate with comparatively modest demand. Inbound flows therefore respond to the joint presence of core heritage attractors and a certified supporting sector rather than to either element alone, which is consistent with the treatment of core resources and supporting factors as complementary components of destination competitiveness (Dwyer, 2022; Xu & Au, 2023).

The pattern also parallels the regional evidence of Algieri & Álvarez, (2023), who showed that regions with comparable resources differ markedly in how effectively they convert them into tourism outcomes, and the link between measured competitiveness and realized performance reported by Kumar et al., (2022); Yamagishi et al., (2023). At the same time, because certified-hotel counts rise with the overall size of regional accommodation markets, the evidence supports certification as a complementary lever rather than as an independent driver of demand, in line with the view that supply-side variables must be interpreted alongside the income and price determinants of tourism demand (Song et al., 2023).

The strong association between certified supply and inbound demand sharpens the policy implication, and international experience with classification reform indicates that the lever is real. Evidence from Spain shows that star-classification systems function as effective quality signals precisely where standards are consistently applied and certification is widespread Núñez-Serrano et al., (2014); evidence from four European hotel markets shows that star category commands price premiums, giving enterprises a private return to certification Illescas-Manzano et al., (2023) ; and guest-evaluation studies confirm that star categories carry information that international visitors actually use (Martin-Fuentes, 2016).

For Uzbekistan, where recent work highlights service-quality gaps in the heritage cities themselves (Karimov et al., 2025), extending certification beyond the heritage core is therefore a plausible lever for spreading inbound demand to currently under-visited

regions. Certification is, moreover, an unusually tractable instrument: it requires standards, inspection and incentives rather than large capital outlays, making it a high-leverage, low-cost enterprise-policy intervention relative to the physical infrastructure investment emphasized in the transport-infrastructure literature (Kuok et al., 2024).

The intermediation findings add a second lever. A developed tour-operator base is the enterprise capability that converts physical and certified supply into marketed international products, and its uneven regional distribution means that even quality accommodation may go under-utilized where product-creating intermediation is absent. Enterprise policy that develops operator capacity in tandem with accommodation certification would address both blades of the micro-level constraint, consistent with the service-capability emphasis of the smart-tourism and frontier-analysis literatures (Assaf & Josiassen, 2016; O'Connor, 2023), and with the evidence that competitiveness improvements translate into measurable sector development (Uyar et al., 2023).

Limitations and future research

The limitations are those of descriptive, cross-sectional enterprise data. First, the supply-demand association is co-determined and cannot be read causally: certified supply plausibly attracts demand, and demand plausibly induces certification; moreover, the strong association between total hotel numbers and demand indicates that part of the observed relationship reflects market scale. Second, firm-level performance, service quality and price are not observed directly, so certification and the upscale count serve as proxies for enterprise quality.

Third, the analysis covers the formal, classified structure rather than the informal accommodation sector, which may be substantial, and the small number of regional units ($n = 13$) limits statistical power and precludes multivariate modelling. Future research should pursue three directions: assembling a multi-year regional panel as classification registers accumulate, which would permit dynamic and causal identification in the spirit of the demand-modelling literature Song et al., (2023); firm-level surveys to validate certification as a quality proxy and to observe prices and performance directly; and quasi-experimental evaluation of certification-policy interventions as they are rolled out region by region.

CONCLUSION

This study shows that Uzbekistan's tourism competitiveness is constrained at the enterprise level by a pervasive quality-certification deficit. Only about 7 percent of hotels hold a star classification, and the upscale segment is confined almost entirely to Samarkand, Bukhara and Khorezm. The number of certified hotels is strongly associated with inbound demand ($r = 0.820$, $p < 0.001$), although this association partly reflects market scale, and the uneven distribution of tour operators and travel agents adds a second constraint outside the heritage core.

The macro-level service-infrastructure deficit is therefore best understood as a quality-certification and enterprise-upgrading problem. Extending certification beyond the heritage core, developing upscale accommodation and strengthening tour-operator capacity offer comparatively low-cost policy levers, while panel, firm-level and quasi-experimental research is needed to establish causality and refine these policy implications.

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CONFLICT OF INTEREST

The author declares no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper. The author has no affiliation with, or financial involvement in, any hotel, tour operator, travel agency, or public body whose data are analysed in this study.

AUTHOR CONTRIBUTION

B. Sobirov is the sole author of this article and was responsible for conceptualization, methodology, data curation, formal analysis, investigation, visualization, writing (original draft). The author has read and approved the final version of the manuscript and takes full responsibility for its content.

GENERATIVE ARTIFICIAL INTELLIGENCE USAGE STATEMENT

During the preparation of this manuscript, the author used AI to improve the language, academic style and structure of the abstract, and conclusion sections, and to cross-check the reported correlation coefficients against the regional data in Table 1. The tool was not used to generate data, produce figures, or create references. After using this tool, the author reviewed, verified and edited all content as needed and takes full responsibility for the content of the published article.

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