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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

Macro-level competitiveness indices identify weak tourist-services infrastructure as a binding constraint on Uzbekistan's tourism competitiveness, but the existing literature largely macro-level or demand-side in orientation does not reveal the micro-level, enterprise-structure origins of this deficit; closing this gap is the motivation for the present study. The objective of the research is threefold: 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. Methodologically, the study is a quantitative, descriptive-correlational, cross-sectional analysis of secondary enterprise data for the 2023 reference year, compiled from the official registers of the Statistical Agency of the Republic of Uzbekistan; descriptive statistics and Pearson product-moment correlation analysis are applied across the thirteen regional units. The central finding is a pervasive quality-certification deficit: 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. Quality-classified supply is strongly and positively associated with inbound demand ($r = 0.820$, $p < 0.001$, $n = 13$). The findings imply that quality certification, upscale-segment development and a stronger tour-operator base are high-leverage, comparatively low-cost enterprise-policy instruments for raising Uzbekistan's service-infrastructure competitiveness and dispersing demand beyond the heritage core. The main limitation is the cross-sectional design, which precludes causal inference and motivates future panel and firm-level research.

Keywords: tourism enterprise; accommodation quality; star classification; micro-competitiveness; service infrastructure; Uzbekistan

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 (Webster & Ivanov, 2014), 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 (Gooroochurn & Sugiyarto, 2005; Mendola & Volo, 2017). Scholars have nevertheless cautioned that such indices describe rather than explain competitive outcomes (Mazanec et al., 2007), and that meaningful evaluation requires disaggregation to the regional and enterprise scales at which tourism services are actually produced and consumed (Zhang et al., 2011).

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 of Crouch, (2003); Dwyer & Kim, (2003), 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 G. I. Crouch, (2011) expert-based analysis of determinant attributes ranks the quality of tourism suprastructure accommodation above all among the most influential competitiveness attributes. Cracolici & Nijkamp, (2009) demonstrated at the regional scale that micro-based indicators of the tourism supply are essential to explaining destination attractiveness and competitiveness, and the empirical link between measured competitiveness and realized tourism performance has been validated for both large and small destinations (Croes, 2011; Croes & Rivera, 2010). 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, (2012), (2016) 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 (Gretzel et al., 2015). 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 the Turin hotel market shows that credible quality signals command measurable price premiums Abrate et al., (2011); 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 gravity-model and dynamic-panel evidence of Khadaroo & Seetanah, (2008); Seetanah & Khadaroo, (2009) 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 & Li, 2008). 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 (Mazanec et al., 2007). 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 (1) 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; (2) to test whether quality-classified accommodation supply is significantly associated with inbound foreign-tourist demand across regions; and (3) 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 Section 4.6.

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 and rates) characterize the regional distribution of each measure, presented in Table 1 and Figures 1, 2 and 4. Second, the association between quality-classified supply 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. 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 — 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: most regions have classification rates in the low single digits or zero, and only a handful exceed the national average.

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.

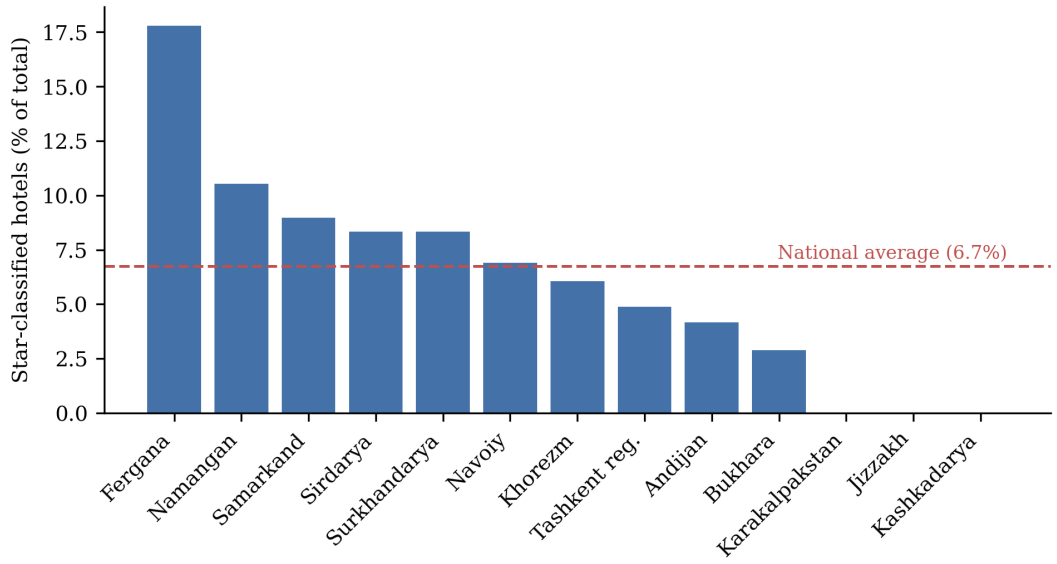

Figure 1. Share of hotels that are star-classified, by region; the dashed line is the national average.

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 while the great majority of regions have none. Star-classified accommodation of any grade is similarly concentrated, with Samarkand and Bukhara accounting for a disproportionate share of the national total. 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.

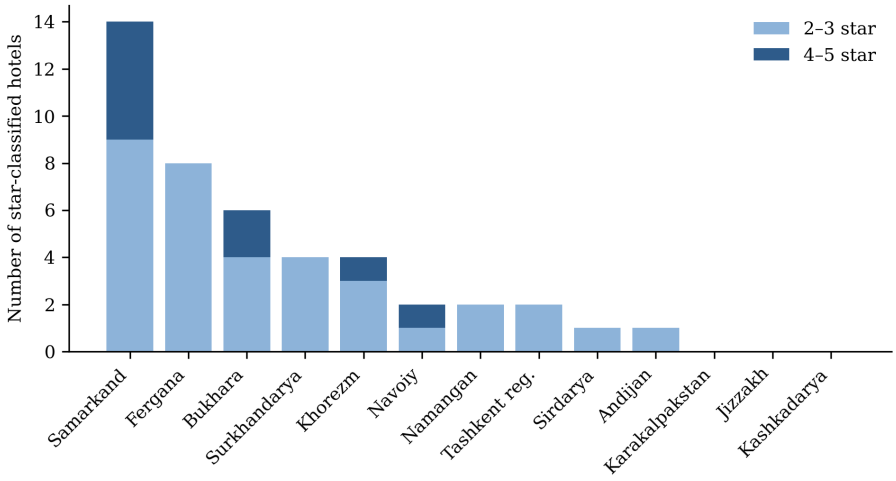

Figure 2. Distribution of star-classified hotels (2–5 star) by region.

Table 1. Enterprise structure and inbound demand by region, 2023 (source: Statistical Agency of the Republic of Uzbekistan).

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

Source: Data Processed

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 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.

Substantively, the regions that have developed a certified, quality-signalled accommodation segment Samarkand, Bukhara, 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, and it identifies the certified segment as the demand-relevant part of the accommodation base.

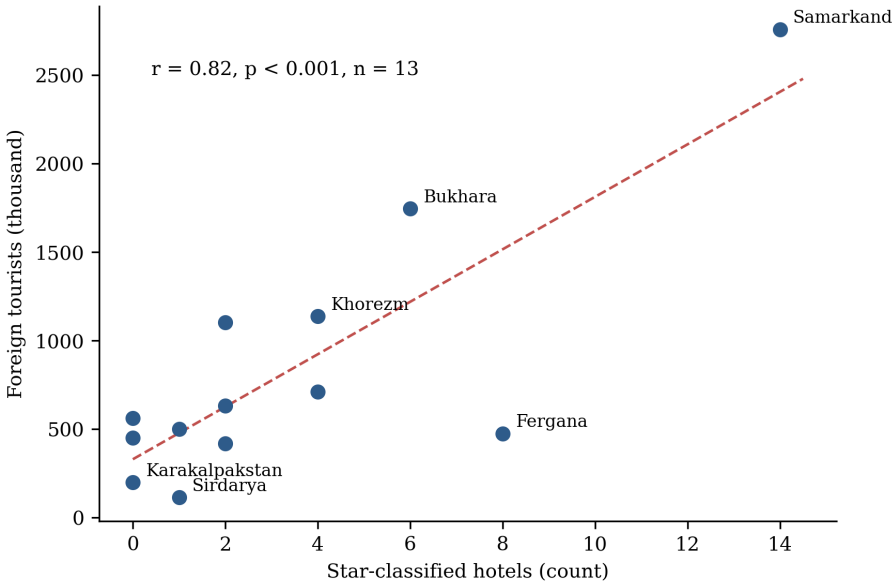

Figure 3. Star-classified hotels and foreign-tourist numbers across regions (r = 0.820, p < 0.001, n = 13).

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 and the heritage regions combine large operator bases with developed agent networks, whereas several regions have very thin intermediation sectors of either type. 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.

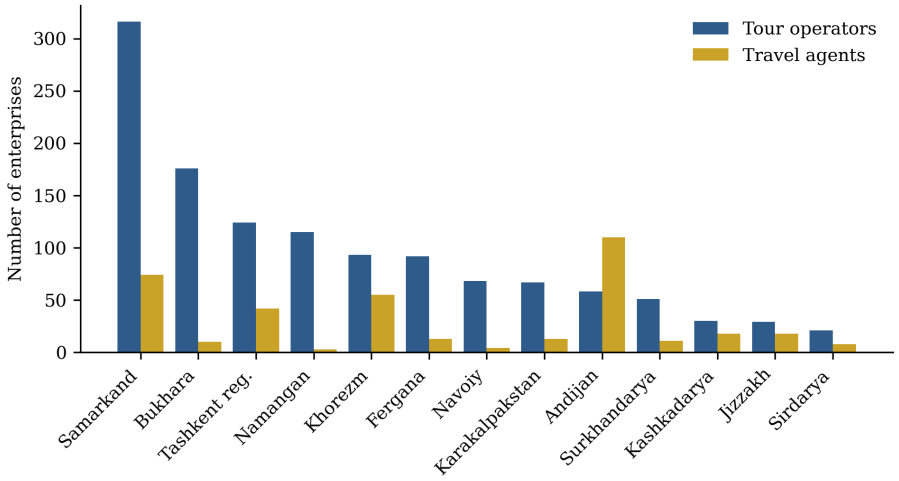

Figure 4. Composition of the travel trade (operators and agents) by region.

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 of Crouch, (2003); Dwyer & Kim, (2003) 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 Cracolici & Nijkamp, (2009) regional, micro-based approach to a new institutional context, and they are consistent with G. I. Crouch, (2011) ranking of tourism suprastructure among the most influential competitiveness attributes. 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 (Mazanec et al., 2007).

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 the Turin hotel market shows that credible quality signals command price premiums, giving enterprises a private return to certification Abrate et al., (2011) ; 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 (Khadaroo & Seetanah, 2008).

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; Gretzel et al., 2015), 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. 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.

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 & Li, (2008); 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

The study finds that Uzbekistan's tourism competitiveness is constrained by a significant quality-certification deficit, with only about 7% of hotels classified by star rating and upscale accommodation concentrated in three heritage regions. Quality-classified accommodation is strongly associated with inbound tourist demand ($r = 0.820$, $p < 0.001$), while the uneven distribution of tour operators and travel agents further limits regional competitiveness.

These findings indicate that the broader service-infrastructure deficit reflects specific enterprise-level weaknesses. Extending quality certification beyond the heritage core, developing upscale accommodation, and strengthening tour-operator capacity are therefore key policy measures. However, the cross-sectional design prevents causal inference, highlighting the need for future panel, firm-level, and quasi-experimental research.

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