



Article

Capacity versus Activity in Regional Tourism: Accommodation and Tour-Firm Indicators for Samarkand Region, Uzbekistan, 2024–2025

Ibragimov Sardorbek*¹

1. Independent researcher at “Silk Road” International University of Tourism and Cultural Heritage

*Correspondence: sardorbek3005@gmail.com

Abstract: Growth in tourism infrastructure does not necessarily proceed at the same pace as growth in the services it delivers. This paper compares Samarkand Region’s shares of Uzbekistan’s tourism capacity and tourism activity, using official 2024 and 2025 statistics for all 14 first-level territorial units. Shares, relative intensity ratios and Herfindahl–Hirschman concentration indices were calculated within consistent statistical coverage. In 2024 Samarkand accounted for 19.38% of the country’s tour firms but only 3.13% of the persons they served. Persons served per firm were 428.5, against a national mean of 2,655.3 (ratio 0.161) and a regional median of 790.9. Persons accommodated per hotel room were 64.9, against 75.2 nationally (ratio 0.862); this ratio is not an occupancy rate. Firm activity was strongly concentrated across regions (HHI 3,222 for firm numbers and 4,692 for persons served), and the national per-firm mean was dominated by two units. In 2025 the number of persons served by Samarkand firms rose by 212.5%, while the national total rose by only 0.45%, lifting the region’s share to 9.73%. In the broader all-facility accommodation series, Samarkand’s share of persons accommodated (17.13%) exceeded its share of rooms (13.74%). A single year of data therefore cannot support conclusions about persistent regional under-performance. Room-nights sold, available room-nights, service type, prices and local procurement should be monitored together with counts of establishments and rooms.

Keywords: Regional tourism; accommodation capacity; tour operators and travel agencies; service volume; spatial concentration; Herfindahl–Hirschman index; Samarkand.

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1. Introduction

The opening of a new hotel or tour firm signals an expansion of tourism supply. The number of providers, however, says little about how long visitors stay, how much they spend or what the providers earn. The size of tourism infrastructure and the results of its use should therefore be examined separately. Destination competitiveness models link a destination’s performance to its inherited and created resources, supporting factors, management and demand conditions [1], and ultimately to the prosperity of its residents [2]. From this perspective, the conversion of capacity into activity is itself a dimension of performance, and it can differ substantially between regions of the same country.

Regional tourism activity is typically distributed more unevenly than population or income. In China, inequality in tourism measured on both the demand and the supply side was found to be considerably greater than socio-economic inequality [3]; regional tourism growth also exhibits spatial spillovers between neighbouring provinces [4], and inequality

indices remain a standard tool for tracking how arrivals are distributed across territories [5]. One consequence is that a national average may be dominated by a handful of regions, so that the choice of benchmark becomes part of the result.

The question is pertinent in Uzbekistan, where tourism supply has expanded rapidly. Between 2017 and 2025 the number of hotels and similar establishments rose from 816 to 2,257 [6], the number of persons accommodated in them from 1,714.2 thousand to 3,383.7 thousand [7], and the number of persons served by tour firms from 670.0 thousand to 1,981.7 thousand [8]. Establishment numbers thus grew by 177% and placements by 97%, so that placements per establishment fell from about 2,100 to about 1,500. Whether this reflects under-used capacity, smaller new establishments or changes in registration cannot be read from the totals, and the same ambiguity applies with greater force at the regional level.

For Samarkand, Uzbekistan's leading heritage destination, this distinction has direct policy relevance. The region combines internationally known urban heritage with an emerging rural and agritourism supply in its districts [9], so that both the volume and the spatial reach of tourism activity matter. The region's share of hotel capacity may be high while its share of the services registered through tour firms is at a quite different level. Labelling such a gap as inefficiency would be premature: firm size, service type and the coverage of statistical reporting may all affect the result, and the cause cannot be identified without examining them.

Official statistics distinguish hotels and similar establishments from specialised and other accommodation facilities [10]. A tour firm's client, moreover, is not always the purchaser of a package tour: persons who were only issued a visa, a foreign-travel passport or a hotel reservation through a firm are also counted [10]. Firm clients, cross-border trips and hotel placements are therefore different statistical units and cannot be added together; the international recommendations on tourism statistics likewise separate trips, visitors and overnight stays [11]. The intermediary role of travel agencies has also been reshaped by direct online booking and by platform-based reintermediation [12], so the proportion of visitors who pass through registered firms may differ between regions for structural reasons.

The aim of this study is to compare Samarkand's shares of national tourism capacity and activity on a consistent statistical basis. Three questions guide the analysis: where do capacity and activity shares diverge; is Samarkand's position robust to the choice of benchmark; and how do the 2025 data change conclusions drawn from a single year? The results describe the statistical baseline from which event and destination planning in the region must start [13].

2. Materials and Methods

2.1. Data and coverage

Regional data for 2024 were taken from the release of the Statistics Agency of 12 August 2025 [10], and data on tour firms for 2025 from the release of 10 August 2026 [14]. The annual number of hotels and similar establishments by region for 2017–2025 was taken from indicator 864 of the national statistical information system (SIAT), last updated on 19 August 2026 [6]. All 14 first-level territorial units were covered: the Republic of Karakalpakstan, twelve regions and Tashkent city. The data derive from the annual reporting form 1-turizm and exclude individuals and individual entrepreneurs [10], [14]. For every indicator, the sum of the regional values was checked against the published national total, and all matched.

Persons and tours are published in thousands with one decimal place. The resulting rounding error is negligible for Samarkand and for the national totals (well below 0.1% in relative terms) but can be large for regions with very small counts, such as Andijan, whose firms served 0.7 thousand persons in 2024. This is one reason why the regional median,

rather than the values of individual small regions, is used as a benchmark. Where 2025 room counts are published only in thousands, the bounds implied by rounding are reported explicitly.

Coverage was kept constant in every ratio. The 2025 release reports accommodation for all accommodation facilities rather than for hotels and similar establishments only [14]. The 2025 all-facility figures were therefore compared only with national totals of the same coverage in the same year, and never with the 2024 hotel figures.

2.2. Definitions

An establishment is an accommodation unit providing services; rooms and beds measure its capacity. Persons accommodated is the number of placements recorded in accommodation reporting. It need not equal the number of distinct visitors in a year, because the same person may be accommodated more than once; the international recommendations draw the same distinction between visitors, trips and overnights [11]. Tours sold denotes the number of tour packages (vouchers) sold by firms; the release does not define the term further [10]. A room-night is one room occupied for one night. The reporting form also collects overnight stays [10], but neither nights nor room-nights sold and available are reported in the regional tables used here.

2.3. Indicators

Samarkand's share of the national total of indicator x , in per cent, is

$$p = 100 \times \frac{x_S}{x_U} \quad (1)$$

where the subscripts S and U denote Samarkand and the Republic of Uzbekistan. Activity per unit of capacity was compared through the relative intensity ratio

$$R = \frac{\frac{y_S}{x_S}}{\frac{y_U}{x_U}} \quad (2)$$

where x is a count of establishments or of capacity and y the corresponding activity. $R = 1$ means that Samarkand's ratio equals the national ratio, and $R < 1$ that it is lower. R is a ratio of ratios analogous to a location quotient [15]; it is not a measure of quality or profitability. Because a national mean can be dominated by a few regions, Samarkand's ratio was also compared with the median of the 14 regional ratios, and its rank is reported. As a third benchmark, Samarkand was compared with Bukhara, the country's other principal heritage destination, whose tourism profile is the closest available peer.

Concentration across regions was measured with the Herfindahl–Hirschman index

$$HHI = \sum_{j=1}^{14} s_j^2 \quad (3)$$

where s_j is the percentage share of territorial unit j [16]. With 14 units the index ranges from 714 (equal shares) to 10,000 (all activity in one unit). Shares were recomputed from the counts rather than taken from rounded published percentages. The index measures how strongly activity is concentrated in particular regions; it says nothing about competition among firms and cannot be transferred to the distribution among districts within Samarkand. Because the number of units is the same in every comparison, the raw index is reported rather than a version normalised to the range 0–1.

3. Results

3.1. Capacity and activity shares, 2024

Table 1 compares Samarkand with the national totals. In 2024 the region had 361 hotels and similar establishments with 6,603 rooms and 13,827 beds, in which 428.4 thousand persons were accommodated [10]. Its shares of rooms (17.34%) and beds (17.40%) exceeded both its share of establishments (15.15%) and its share of persons accommodated (14.96%). Beds per room were almost identical in Samarkand and in the country as a whole (2.09), so room and bed shares tell the same story. The gap was much wider among tour firms: Samarkand accounted for 19.38% of the country's firms but only

3.13% of the persons they served and 11.92% of the tours they sold. Figure 1 presents the comparison. Because the national total of each indicator is set to 100% separately, the bars cannot be summed into an overall “tourism share”.

Table 1. Samarkand’s share of Uzbekistan’s tourism indicators, 2024

Indicator	Samarkand	Uzbekistan	Samarkand share (%)
Tour firms (units)	144	743	19.38
Persons served by tour firms (thousand)	61.7	1,972.9	3.13
Tours sold (thousand)	71.7	601.5	11.92
Hotels and similar establishments (units)	361	2,383	15.15
Rooms (units)	6,603	38,075	17.34
Beds (units)	13,827	79,469	17.40
Persons accommodated (thousand)	428.4	2,864.3	14.96

Source: [10], pp. 3–4; shares computed from the published counts. Firm and accommodation indicators belong to separate reporting groups.

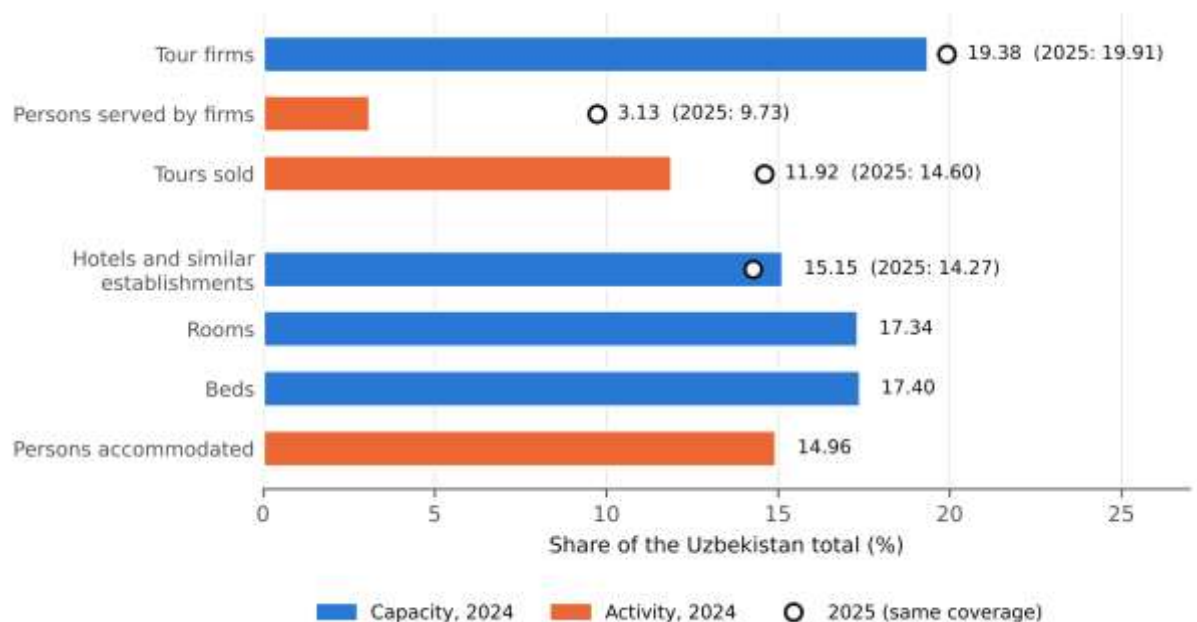


Figure 1. Samarkand’s share of Uzbekistan’s tourism capacity and activity indicators

Source: Table 1 and [6], [14]. Each indicator’s national total equals 100% separately, so the bars cannot be added. Open markers show 2025 values where the coverage is unchanged.

3.2. Intensity ratios and the choice of benchmark

Table 2 reports the intensity ratios. Persons served per firm amounted to 428.5 in Samarkand and 2,655.3 nationally ($R = 0.161$). The national mean, however, is shaped by two units. In Khorezm, 28 firms served 497.5 thousand persons, or 17,768 per firm, while selling only 43.2 thousand tours; in Tashkent city the ratio was 3,211.5. Without these two units, the pooled ratio for the remaining twelve regions falls to 685.8. Against the median of the 14 regional ratios (790.9), Samarkand’s value is 0.54, and the region ranks tenth. The relationship between persons served and tours sold also varies: Samarkand firms recorded 1.16 tours per person served, Khorezm firms 0.09. The two counts evidently capture different mixes of services across regions, and the ratio of tours sold per firm (497.9 against 809.6; $R = 0.615$) gives a far less extreme picture than the ratio of persons served.

Persons accommodated per hotel room were 64.9 in Samarkand and 75.2 nationally ($R = 0.862$), placing the region ninth against a regional median of 69.9; per bed, the values were 31.0 and 36.0. These ratios do not show for how many days rooms were occupied, which would require room-nights sold and available. Samarkand's establishments were also larger, with 18.3 rooms each against 16.0 nationally. An identical number of establishments therefore does not imply identical room capacity, and establishments, rooms and beds must be tracked separately when new construction and service volumes are assessed.

The peer comparison separates the two parts of the gap. Bukhara's hotels accommodated 67.1 persons per room in 2024, so Samarkand's hotel ratio was 97% of its peer's. Bukhara's firms, however, served 1,502.3 persons each, and Samarkand's firm ratio was only 29% of that value. Measured against its closest peer, Samarkand's accommodation sector therefore looks unremarkable, whereas the low volume of persons registered per tour firm stands out and calls for an explanation in terms of firm size and service mix.

Table 2. Intensity ratios for Samarkand compared with the national mean and the regional median

Ratio	Samarkand	Uzbekistan	R	Median of 14 units	Samarkand rank (of 14)
Persons served per firm, 2024	428.5	2,655.3	0.161	790.9	10
Tours sold per firm, 2024	497.9	809.6	0.615	643.9	9
Persons accommodated per room, 2024	64.9	75.2	0.862	69.9	9
Persons accommodated per bed, 2024	31.0	36.0	0.860	33.7	10
Rooms per establishment, 2024	18.3	16.0	1.145	16.0	5
Persons served per firm, 2025	1,114.5	2,280.4	0.489	1,166.8	8
Tours sold per firm, 2025	596.5	813.5	0.733	744.4	9

Source: author's calculations from [10], [14]. R is defined in Eq. (2); rank 1 denotes the highest ratio. Accommodation ratios refer to hotels and similar establishments.

3.3. Regional concentration

Firm activity was considerably more concentrated than accommodation capacity (Table 3). The HHI was 3,222.4 for the number of firms, with Tashkent city, Samarkand and Bukhara together accounting for 77.79% of all firms, and 4,691.8 for persons served, of whom 63.5% were recorded in Tashkent city and 25.2% in Khorezm. For hotels and similar establishments the index was 1,819.3, with Tashkent city, Samarkand and Fergana accounting for 62.32% of the total [10]; for rooms it was 1,937.4. In 2025 the concentration of persons served fell to 3,164.4, while that of firm numbers was almost unchanged at 3,160.1. The decline reflects a 25.0% fall in persons served by Tashkent city firms, whose share dropped to 47.4%, together with growth elsewhere: persons served doubled in Bukhara and tripled in Samarkand. The Khorezm outlier persisted, with 18,921 persons per firm in 2025 and 27.7% of the national total.

Table 3. Concentration of tourism indicators across the 14 territorial units

Indicator	HHI 2024	Three largest units, 2024 (combined share, %)	HHI 2025
Tour firms	3,222.4	Tashkent city, Samarkand, Bukhara (77.79)	3,160.1
Persons served by firms	4,691.8	Tashkent city, Khorezm, Bukhara (92.05)	3,164.4
Tours sold	4,245.4	Tashkent city, Samarkand, Bukhara (83.01)	4,166.5
Hotels and similar establishments	1,819.3	Tashkent city, Samarkand, Fergana (62.32)	1,841.0
Rooms	1,937.4	Tashkent city, Samarkand, Bukhara (65.12)	–
Persons accommodated	2,381.9	Tashkent city, Samarkand, Bukhara (68.52)	–

Source: author's calculations from [6], [10], [14]. The HHI ranges from 714 (equal shares) to 10,000. Dashes: no 2025 hotels-only regional data; in the 2025 all-facility series the HHI was 1,486.2 for rooms and 1,810.5 for persons accommodated.

3.4. Changes between 2024 and 2025

Table 4 shows that the components of tourism did not move in the same direction between 2024 and 2025. In Samarkand, the number of hotels and similar establishments fell by 10.8%, while the number of tour firms rose by 20.1%, tours sold by 43.9% and persons served by 212.5% [6], [14]. Nationally, persons served increased by only 0.45%. As a result, Samarkand's share of persons served rose from 3.13% to 9.73%, and its share of tours sold from 11.92% to 14.60%. Persons served per firm reached 1,114.5 against a national 2,280.4 ($R = 0.489$); relative to the regional median of 1,166.8, however, the ratio was 0.96, and Samarkand moved up to eighth place. Tours sold per firm rose to 596.5, against 813.5 nationally ($R = 0.733$).

The 2025 all-facility data point in the same direction. Samarkand held 13.75% of all accommodation facilities and 13.74% of their rooms, but 17.13% of persons accommodated: 89.9 persons per room against 72.1 nationally ($R \approx 1.25$, or 1.24–1.25 allowing for the rounding of room counts published in thousands) [14]. The region hosted major international events in 2025, including the UNESCO General Conference [17], but the available statistics do not allow the event-related part of this growth to be isolated.

Table 4. Change in Samarkand's hotel and tour-firm indicators, 2024–2025

Indicator	Samarkand 2024	Samarkand 2025	Change, Samarkand (%)	Change, Uzbekistan (%)
Hotels and similar establishments (units)	361	322	–10.8	–5.3
Tour firms (units)	144	173	+20.1	+17.0
Persons served by tour firms (thousand)	61.7	192.8	+212.5	+0.45
Tours sold (thousand)	71.7	103.2	+43.9	+17.5

Source: tour firms [10], [14]; hotels and similar establishments [6]. Changes are relative to the 2024 value of each indicator.

3.5. A discontinuity in the establishment series

The longer SIAT series adds a further caution (Figure 2). Samarkand's share of the country's hotels and similar establishments rose from 13.5% in 2017 to 19.1% in 2023, then fell to 15.2% in 2024 and 14.3% in 2025 [6]. The 2024 fall occurred despite a 36.2% increase

in the region's own count, because the national total jumped by 71.8%, from 1,387 to 2,383 establishments. Of the 996 additional units, 709 were recorded in Tashkent city and Fergana; Fergana's count moved from 55 to 280 and then back to 122. Such discontinuities are consistent with changes in registration or coverage rather than with construction alone, although the source does not explain them, and they directly affect any share calculated for 2024. The national placement series supports this reading: persons accommodated per establishment fell from 1,820 in 2023 to 1,202 in 2024, the year of the break, before recovering to 1,499 in 2025 [6], [7]. Placements did not jump when the establishment count did.

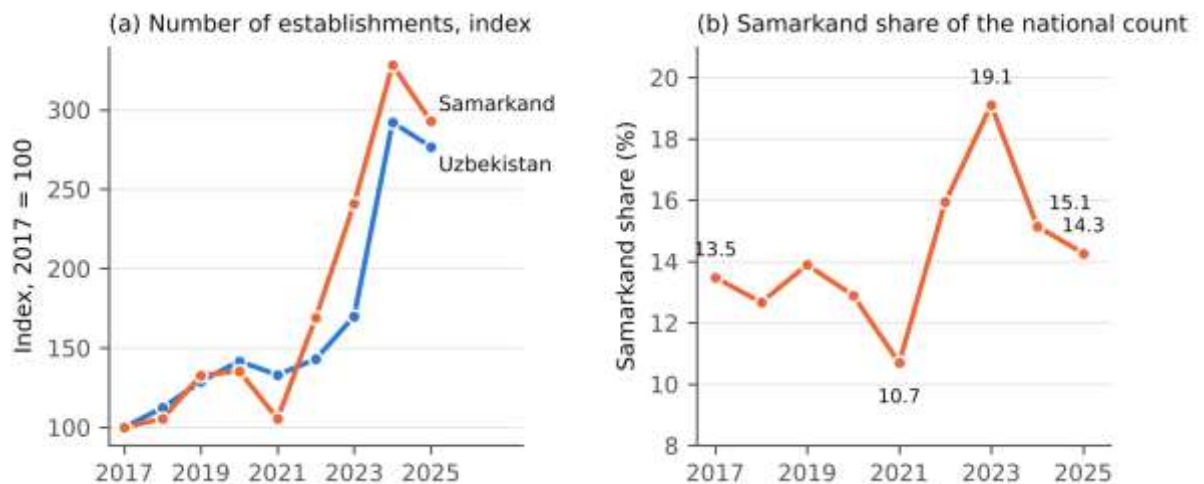


Figure 2. Hotels and similar establishments, 2017–2025: national and Samarkand counts (index) and Samarkand's share

Source: [6]. The jump in the national count in 2024 is concentrated in Tashkent city and Fergana.

4. Discussion

4.1. Interpreting gaps between capacity and activity

The results show the limits of describing regional tourism with a single number. The number of firms reflects the organised part of supply, whereas the number of persons served reflects the registered volume of services, and the gap between them may stem from differences in firm size and service type. Because the data do not allow these causes to be tested, persons served per firm was not interpreted as labour productivity or economic efficiency. The benchmark matters as much as the ratio. Measured against the national mean, Samarkand's firms served 16% of the average number of persons in 2024; measured against the regional median, 54%; and in 2025 almost exactly the median. This mirrors the broader finding that tourism activity is spatially concentrated [3], [5]: averages shaped by a capital city and a single outlier region are poor yardsticks for other regions. The ratio of tours sold to persons served, which ranged from 0.09 in Khorezm to 2.43 in Tashkent region in 2024, is a simple diagnostic of service mix that could be published routinely alongside the counts.

A similar caution applies to hotels. The ratio of persons accommodated to rooms is insufficient on its own: if stays are longer, fewer guests can generate more room-nights, and revenue depends on both the room-nights sold and their price. Without these data, a firm conclusion that existing capacity is under-used cannot be drawn. The reversal of the sign of the gap in the 2025 all-facility series reinforces this point.

In the terms of destination competitiveness models, the conversion of capacity into activity belongs to destination management and demand conditions rather than to resource endowment [1]. Samarkand's endowment is not in question. What the indicators

examined here cannot yet reveal is how efficiently that endowment, and the capacity built around it, is converted into visitor nights, spending and local income [2].

For regional authorities, the practical implication is to treat the 2024 gap as a hypothesis to be tested rather than as a diagnosis. Before additional accommodation construction is encouraged or discouraged, room-night data for existing establishments should be obtained; before support for tour firms is redesigned, the composition of their services should be known. Major events of the kind Samarkand hosted in 2025 create temporary demand peaks [13], and capacity planning based on a single event year risks either over-building or under-provision.

4.2. From counts to local economic outcomes

Counts of hotels and firms are also silent on how much tourism spending remains in the region. The local benefit of tourism depends on linkages with local suppliers and on the leakage of revenue to non-local owners and imports [18], [19]. Even a simple survey of the share of hotel and tour-firm purchases sourced within the region would provide a first indicator of local retention. Measuring tourism value added at the subnational level requires accounts of the kind set out in the Tourism Satellite Account framework [20], and tracing the dispersal of visitors to districts beyond the city, where farm-level evidence on agritourism in Samarkand region already exists [9], requires district-level booking and overnight data. Table 5 lists the indicators that would allow such questions to be answered. It is not a new statistical result but a proposed content for future monitoring, designed to test decisions on construction and event hosting against realised demand.

Table 5. Indicators to be monitored in regional tourism management

Management question	Required data	Use in decision-making
Use of rooms	Room-nights sold and available room-nights	Judge whether new capacity or demand for existing capacity is needed
Dispersal of visits to districts	Bookings and overnight stays by district	Test the local results of routes and itineraries
Participation of local business	Suppliers and contract values	Identify the share of purchases retained in the region
Activity of tour firms	Service type, clients and revenue	Compare different service models

Source: author's proposal based on the results and on [11], [20].

The analysis also points to improvements in official reporting. Three would make regional comparisons substantially more reliable: the publication of nights spent and of room-nights sold and available by region, which the reporting form already collects in part [10]; a hotels-only regional series that is consistent across years, accompanied by metadata explaining breaks such as that of 2024; and a breakdown of persons served by tour firms by type of service, separating package tours from visa, passport and booking services. These steps follow the international recommendations on tourism statistics [11] and would allow capacity use to be measured directly rather than inferred from counts.

4.3. Limitations

The study relies on official aggregated data. Enterprise revenue, payments and the distribution among Samarkand's districts were not observed, and the regional HHI cannot be transferred from the national cross-section to the interior of the region. Two years of firm data are insufficient to establish a long-term trend, and the establishment series contains a discontinuity in 2024. The fourteen territorial units also differ greatly in size and tourism function, from Tashkent city, the capital and main gateway, to regions with very small tour-firm sectors, so that even the regional median is an imperfect benchmark.

Finally, hotels-only regional detail for 2025 is available only for the number of establishments, which limits year-on-year comparisons of capacity use.

5. Conclusion

In 2024 Samarkand's shares of national tourism capacity exceeded several of its shares of tourism activity, most strikingly among tour firms. This difference does not by itself prove inefficiency or the leakage of revenue from the region. Against a regional median rather than a national mean the gap narrows considerably, and the 2025 data show how hazardous it is to generalise a single year's result into a persistent problem: persons served by Samarkand firms tripled, and in the all-facility series the region's share of persons accommodated exceeded its share of rooms. Nationally, too, the number of establishments has grown faster than placements since 2017, which makes consistent statistics on capacity use a priority well beyond Samarkand. Regional tourism management should monitor establishments and rooms together with room-nights sold, available room-nights, service type, prices and local procurement. Future research should combine these data at enterprise and district level and reconcile breaks in the official series before shares are used for investment or event-hosting decisions. The figures reported here can then serve as a baseline against which the effects of new investment and of major events are measured.

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