

STRATEGIC PROSPECTS FOR MANAGING DOMESTIC TOURISM IN KAZAKHSTAN**¹R.K. Sadykova*** , **²Y.G. Tleubay** ^{1,2}Astana International University, Astana, Republic of Kazakhstan*e-mail: r.sadykova59@mail.ru

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Abstract. This article examines the strategic prospects for domestic tourism management in Kazakhstan in the context of updating state policy for the period up to 2029-2035. Based on an analysis of the current state of the industry and official statistics for 2023-2025, the authors identify key management challenges: disparities in regional development, infrastructure constraints, staff shortages, and seasonality. Particular attention is also given to promising areas for improving the management system, such as digitalization, accelerated development of tourism clusters, and professional training. This article substantiates the need to transition from an extensive growth model to sustainable and balanced development of the industry based on a program-targeted approach.

Keywords: tourism, strategic management, tourism policy, cluster approach, Kazakhstan, sustainable development, tourism digitalization.

СТРАТЕГИЧЕСКИЕ ПЕРСПЕКТИВЫ УПРАВЛЕНИЯ ВНУТРЕННИМ ТУРИЗМОМ В КАЗАХСТАНЕ**¹Р.К. Садыкова***, **²Я.Г. Тлеубай**^{1,2}Международный университет Астана, г. Астана, Казахстан*e-mail: r.sadykova59@mail.ru

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Аннотация. В этой статье будут рассматриваться стратегические перспективы управления внутренним туризмом в Казахстане. А именно в контексте актуализации государственной политики на период до 2029-2035 годов. В ходе проведения анализа текущего состояния этой отрасли и по данным официальной статистики 2023-2025 годов, планируется выявление ключевых вызовов управленческого характера: дисбаланс в региональном развитии, инфраструктурные ограничения, нехватка хороших специалистов и сезонность. Также особое внимание уделяется и перспективным направлениям совершенствования системы управления, таким как цифровизация, форсированное развитие туристских кластеров и подготовка профессиональных работников. В этой статье обосновывается необходимость перехода от экстенсивной модели роста к более сбалансированному развитию отрасли на основе программно-целевого подхода.

Ключевые слова: внутренний туризм, стратегическое управление, туристская политика, кластерный подход, Казахстан, устойчивое развитие, цифровизация туризма.

ҚАЗАҚСТАНДАҒЫ ІШКІ ТУРИЗМДІ БАСҚАРУДЫҢ СТРАТЕГИЯЛЫҚ ПЕРСПЕКТИВАЛАРЫ

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Аңдатпа. Бұл мақалада 2029-2035 жылдарға дейінгі кезеңге арналған мемлекеттік саясатты жаңарту тұрғысынан Қазақстандағы ішкі туризмді басқарудың стратегиялық перспективалары қарастырылады. Саладағы ағымдағы жағдайды талдау және 2023-2025 жылдарға арналған ресми статистика негізінде авторлар басқарудың негізгі қиындықтарын анықтайды: аймақтық дамудағы теңсіздік, инфрақұрылымның шектеулері, кадрлардың жетіспеушілігі және маусымдық. Сондай-ақ, басқару жүйесін жетілдірудің перспективалы бағыттарына, мысалы, цифрландыруға, туристік кластерлерді жеделдетіп дамытуға және кәсіби оқытуға ерекше назар аударылады. Бұл мақалада бағдарламалық-бағытталған тәсілге негізделген саланың экстенсивті өсу моделінен тұрақты және теңгерімді дамуына көшу қажеттілігі негізделеді.

Түйін сөздер: ішкі туризм, стратегиялық басқару, туристік саясат, кластерлік тәсіл, Қазақстан, тұрақты даму, туризмді цифрландыру.

Introduction. Tourism in Kazakhstan has demonstrated impressive growth in the post-pandemic period, becoming a key factor in the diversification of the national economy. According to the Bureau of National Statistics, in 2024, the number of visitors served by accommodation facilities exceeded 4.8 million, significantly exceeding previous years (Bureau of National Statistics, 2025). However, as the industry grows in size – it becomes harder to manage. There is a really high concentration of tourist in the same few places, the regional infrastructure is uneven, there are not enough trained professional personnel and the business overall is highly seasonal. To keep up, strategic planning requires a revision of the listed approaches.

The purpose of this paper is to identify strategic prospects for improving the domestic tourism management system in Kazakhstan, taking into account current challenges and opportunities.

To achieve this goal, the following objectives were set:

1. To analyse current trends and challenges in domestic tourism management.
2. To evaluate the effectiveness of the strategic documents and approaches being implemented.
3. To substantiate priority areas for the development of the industry's management system in the medium term.

Object of the study: the domestic tourism management system in the Republic of Kazakhstan.

Subject of the research: management mechanisms, trends and prospects for the development of domestic tourism.

The information base includes data from the Bureau of National Statistics, the Tourism Industry Development Concept for 2023-2029, materials from the Ministry of Tourism and Sports of the Republic of Kazakhstan, as well as analytical reports and expert assessments for 2025-2026.

The scientific novelty of this study is a comprehensive analysis of the management aspects of domestic tourism development in Kazakhstan amid the transition to a new economic growth model. This work, for the first time, systematizes the strategic challenges associated with the implementation of updated state policy through 2029 and preparations for long-term planning through 2035. The authors propose promising areas for improving the management system (clustering,

foresight planning, ESG principles), integrated into the context of the Head of State's instructions and the current digitalization agenda for the industry.

Current state and strategic challenges of domestic tourism management. Sustainable growth in domestic tourism in 2023-2025 has cemented this industry's status as a priority economic sector. As previously noted at a government meeting chaired by Prime Minister Olzhas Bektenov in April 2025, tourism in Kazakhstan is viewed as a new growth area for the Kazakh economy (Central Communications Service, 2025). By the end of 2024, investment in the industry for the first five months of 2025 exceeded USD 570 million, and the number of domestic tourists reached 10.5 million (Travel And Tour World, 2025).

State policy, implemented within the framework of the Tourism Industry Development Concept for 2023-2029 (Government Resolution No. 262, 2023), is aimed at developing a competitive industry. But as noted in official documents, while tourism development efforts have intensified, a path forward remains challenging. In this regard, the government is currently updating the Concept through 2029, adding measures to implement the Head of State's instructions, prioritize tourist destinations, mandate strict quality standards, and digitalization (Khabar, 2026).

The main problem remains the uneven distribution of tourism development within the country with major tourist flows being heavily concentrated in only a few popular tourist destinations, such as Almaty, Astana, the Shchuchinsk-Borovskaya resort area, and Lake Alakol. At the same time, there are also regions with high potential in the country, such as East Kazakhstan, Mangystau, and Ulytau, but they unfortunately face a lack of infrastructure. This issues were formally addressed at a government meeting in April 2025, where some of the crucial priorities were raised: constructing a new airport in the Kenderli resort area, as well as to develop roadside services throughout the country (Central Communications Service, 2025).

The infrastructure problem is systemic. On the one hand, significant funds were allocated for the construction and repair of local roads - over 360 billion tenge in 2025 (24KZ, 2025). But on the other hand, the quality of roads leading to remote tourist sites, as well as their provision of electricity, water, and communications, remains poor in quality. As a result, businesses who are willing to invest in regional development often face a lack of basic infrastructure, which also highlights the need for closer cooperation between central and local governments.

Equally pressing are personnel issues and problems with service quality. According to Nurbol Baizhanov, Deputy Chairman of the Tourism Industry Committee of the Ministry of Tourism and Sports of the Republic of Kazakhstan, a shortage of qualified specialists and low service quality remain among the main challenges for the industry's development (Kazakhstan Tourism Association, 2025). Despite the introduction of a dual education system and trimester-based training, the sector continues to experience a shortage of qualified guides, hotel service managers, and service personnel. A significant gap remains between what hotels advertise and the actual quality of service guests receive.

Seasonality also acts as a constraint and limits the utilization of tourism infrastructure. Many regions, particularly mountainous and lakeside ones, typically experience peak demand only in the summer or winter, but business completely drops off during the rest of the year. The development of event tourism and MICE tourism could be a potential solution. This would distribute tourist flows more evenly, smooth out seasonal fluctuations, and ensure year-round employment.

A comparative analysis of domestic tourism management in Kazakhstan reveals both similarities and differences with international experience. Countries with similar geographic and economic conditions, such as Russia, Turkey, and the Central Asian republics, have also faced the tension between rapid quantitative growth and structural management reform. In Turkey for example, they successfully shifted from mass coastal tourism to a broader mix of domestic and cultural tourism through targeted policy intervention. The government basically created special tourist zones that offered preferential tax breaks and mandatory environmental impact reviews. Similarly, Russia's experience with the development of the "Golden Ring" tourist route clearly demonstrates how strong branding along with the coordinated interregional cooperation, can effectively guide tourist flows from already overcrowded megacities. All the examples I've provided only highlight that Kazakhstan's

current challenges are not unique, but rather reflect a transitional phase that can still be overcome through evidence-based policies adapted to local conditions.

Regarding regional imbalances in Kazakhstan's tourism sector, they deserve a more in-depth analysis that goes beyond simply identifying underserved areas. Structural imbalances originate in historical patterns of investment concentration during the Soviet era, where Soviet-era infrastructure was built around a limited number of administratively significant centers.

Overall, the post-independence period hasn't changed this situation, as private investment continued to follow established demand and failed to create new destinations. As a result, regions such as Ulytau, which hold significant historical and archaeological significance as the symbolic heart of the Kazakh steppe, still attract a small number of tourists who come to Almaty or Astana. Consequently, bridging this gap requires more than just infrastructure investments - a strategic and thoughtful approach to destination marketing is needed. It also requires developing key attractions and creating a unique image for these tourist regions, which can then compete for the attention of domestic tourists. The experience of Central European countries such as Poland and the Czech Republic shows that secondary cities and rural regions can achieve competitiveness through a common place branding strategy, accessible transportation links, and investments in the implementation of digital services at cultural heritage sites.

Kazakhstan's tourism workforce challenges also require a more systematic approach. International studies consistently point to workforce quality as a key factor influencing tourist satisfaction and repeat visits. In Kazakhstan, the problem also stems from the geographical mismatch between the number of educational institutions and tourism activity. Universities and colleges offering hospitality and tourism programs are primarily located in Almaty and Astana. Meanwhile, many of the most promising destinations, such as Mangystau, East Kazakhstan, and Shu-Ile, are served by insufficiently trained and qualified personnel. Mobile training centers, online certification programs, and partnerships with local employers could help address this issue.

Furthermore, it would be useful to introduce recognized professional standards aligned with international frameworks, such as those of the World Tourism Organization (WTO). This would provide a benchmark for continuous improvement and help improve the overall quality of service delivery in this sector. Incentivizing experienced hospitality professionals to work in remote regions by offering salary supplements or some kind of housing support program for relocation to remote regions could also accelerate the transfer of their acquired skills from developed tourist centers to developing destinations.

Improving strategic planning and promising management directions. In the phase of active transformation, today the state tourism policy is joining to solve the real problems. Based on monitoring the implementation of development of the industry in tourism, a special council was created (Letter of the Prime Minister, 2026).

Further improvement of tourism clusters is one of the most promising approaches at the moment. Now, instead of targeted funding for individual facilities, the strategy is moving toward the integrated development of territories. Large-scale plans for the development of the Shchuchinsk-Borovskoy resort area, Mangistau, Imantau-Shalkar, and the Almaty mountain cluster are already being implemented. The cluster approach allows for the synchronization of government and business efforts to create interconnected infrastructure—from transportation and communications to accommodations and entertainment. Ultimately, this directly impacts the quality of the tourism product.

Improving the efficiency of the tourism industry depends directly on several critical factors, such as digitalization in governance. Digitization of guide services to improve accessibility and quality should continue according to the opinion of Minister Yerbol Mirzabusynov at a meeting (Kazakhstan Tourist Association, 2025). To address infrastructure development more effectively, digital platforms for tourism flows must be implemented accurately. In addition, the importance of digitization for improving directions in the regions was noted by the participants of the KazNU strategic session (KazNU, 2025).

There are also important areas of public order, such as improving public-private partnership

arrangements and stimulating public investment. For example, the construction and maintenance of ski resorts and purchased buses for tourism programs that account for 25% of support measures costs have shown high efficiency (Central Communications Service, 2025). Provision of land with improved infrastructure and better conditions for investors should be a further plan.

Particular attention should also be paid to training personnel for the hospitality industry. The transition to practice-oriented education, where students spend 60% of their time at tourist sites, must be complemented by a system of professional development for existing staff. Furthermore, national service standards and voluntary certification must be introduced. This will help align service quality with the expectations of both domestic and international tourists.

Sustainable development and environmental responsibility have become an integral part of strategic tourism management in the country. Growing interest in ecotourism is placing additional pressure on specially protected natural areas. Amendments to the Law "On Specially Protected Natural Areas" introduced in 2025 have already allowed for the construction of engineering infrastructure for tourism without land acquisition. However, this is not enough. Mechanisms must be introduced to limit recreational pressure, develop waste collection and recycling systems in national parks, and educate tourists themselves. Integrating ESG principles into regional tourism development strategies will form the basis for preserving the country's natural capital for future generations.

Forecasting the future is an increasingly common approach in tourism management, but it remains underutilized in Kazakhstan. Unlike traditional strategic planning (which relies on current trends), forecasting helps explore possible scenarios to anticipate long-term risks and new opportunities. Some countries, such as Finland and Singapore, have already implemented this approach, with dedicated forecasting departments integrated directly into their national planning cycles.

We are currently developing a tourism development strategy through 2035, and this is a good opportunity to incorporate forecasting methods into it. To begin, it would be useful to identify the key factors that will transform the industry: technological breakthroughs, climate change, shifts in traveler age and interests, and the new geopolitical environment. Based on this, several alternative scenarios can be developed, allowing policymakers to test their decisions against a range of possible scenarios rather than just one. Incorporating such forecasts into the work of the recently established Tourism Council under the Prime Minister would provide a more solid foundation for strategic decisions and help Kazakhstan act proactively, rather than simply react to problems after the fact.

Integrating ESG principles into Kazakhstan's tourism policy would be beneficial more quickly and concretely than is currently documented. While the importance of environmental protection is generally recognized, practical mechanisms are still lacking.

Regarding the environment, it would be useful to introduce a maximum load assessment for popular destinations such as the Charyn Canyon, the Kolsai Lakes, and the Khan Tengri base camps. There, uncontrolled tourist growth is already threatening the environment. The social aspect requires attention to how tourism revenues are distributed: local residents in remote regions should receive their share of the benefits, not simply serve as a backdrop to visitors' experiences. This is especially true for indigenous and traditional communities near protected natural areas—they should be active participants, not passive observers. From a governance perspective, it would be beneficial to ensure transparency in public investments and regular independent verification of how tourism projects impact the environment and society.

All of this together constitutes a comprehensive ESG approach. If systematically integrated into regional tourism strategies, it would simultaneously strengthen investor confidence, increase the attractiveness of our destinations for tourists, and ensure the long-term preservation of Kazakhstan's natural and cultural heritage—the very foundation of tourism.

The digitalization of individual services does not imply digitization in tourism management. A common ecosystem of different tourist data, which in turn will link online booking systems, visitor monitoring and hotel registers at the system level, would be very useful. This in turn will be a direct solution to many problems in tourism, making it a national tourism dashboard. Thus, processes such as demand-side changes and monitoring progress toward strategic goals can be addressed quickly by

policymakers.

Some middle-income countries comparable to ours have already achieved success in this area. For example, the Georgian National Tourism Administration has developed a platform that collects data from various sources and provides detailed analytics for each destination. A similar system in Kazakhstan would benefit from addressing two issues: first, making the databases of various agencies—the Ministry of Tourism, the Ministry of Digital Development, and the regional akimats—compatible; second, carefully addressing privacy issues in the collection and use of traveler information. Without this, it will be difficult to transition to data-driven tourism management, where investments, regulations, and development plans are based on reliable and up-to-date data, not just periodic surveys and expert assessments.

Conclusion. Thus, Kazakhstan's domestic tourism has completed the recovery phase and entered a trajectory of sustainable growth. The quantitative indicators achieved create the foundation for a transition to qualitative changes in the industry's management system. Future prospects for the development of domestic tourism in Kazakhstan are directly linked to addressing systemic issues: disparities in regional development, insufficient infrastructure, personnel shortages, and strong dependence on seasonality.

Updating the Tourism Industry Development Concept for 2023–2029 and the commencement of work on long-term programs through 2035 open up numerous opportunities for the implementation of new management approaches. Key areas include: further development of tourism clusters based on interdepartmental coordination, comprehensive digitalization of the industry to improve service quality and governance, improvement of PPP mechanisms and stimulation of investment activity, as well as reform of the personnel training system and the implementation of quality standards.

Integrating sustainable development principles into strategic planning is of particular importance. Only sustainable economic solutions will be able to preserve unique natural complexes, with the development of infrastructure in tourism. Thus, a significant contribution to the socio-economic development of the regions and the country itself can be made through the implementation of these strategies, and will turn the country's tourism into a highly efficient and competitive industry.

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