

Article

Strategic priorities for tourism industry development in the Almaty region

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Abstract: Tourism is an important instrument for diversifying regional economies and creating employment. Despite its diverse natural and cultural-historical resources, the Almaty region has not fully realized its tourism potential, while development priorities remain insufficiently examined from the perspectives of residents and tourists. This study aims to identify the main constraints on tourism development and formulate strategic priorities for the Almaty region. A mixed-methods design combined a review of scientific literature and national strategic documents with a structured online questionnaire of 15 closed-ended questions completed by 503 respondents. Data were analyzed using descriptive statistics, while SWOT analysis and a TOWS matrix were used to develop strategic directions. The main barriers were inadequate road and transport infrastructure (25.0%), low quality of tourist services (21.3%), and insufficient protection of natural resources (20.5%). Priority measures included improving service quality (23.1%), protecting natural monuments (21.3%), and implementing advertising campaigns (21.1%). Social media was the main source of tourism information (52.9%), while health and wellness tourism was the most demanded type (33.6%). Nearly half of respondents (48.5%) rated service quality as average or below average, and 60.5% considered staff training important or very important. Kolsai Lakes and Charyn Canyon accounted for 51.2% of reported tourism demand, indicating the need for visitor management at major natural attractions. Respondents primarily associated the role of government with attracting investment (40.4%), while Talgar district was identified as the main territorial priority (42.5%). The SWOT-TOWS analysis identified strategic priorities including infrastructure modernization, workforce development, digital marketing, investment attraction, and nature conservation. The findings provide an evidence base for regional tourism development programmes and management decisions.

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1 Introduction

Tourism is regarded as an important instrument for diversifying regional economies, creating new jobs and preserving natural and cultural heritage (Baiburiev et al., 2018; Laut et al., 2021). In Kazakhstan, tourism development is one of the priority areas of state policy: the Concept for 2023–2029 sets the

objectives of increasing domestic and inbound tourism, developing tourism infrastructure and improving service quality (Government of the Republic of Kazakhstan, 2023).

The Almaty region is one of the country's regions with the highest tourism potential. Well-known sites such as Charyn Canyon, the Kolsai and Kaindy Lakes, Altyn-Emel National Park and the Kapshagay Reservoir, together with proximity to the Almaty agglomeration with more than a million inhabitants, ensure a steady tourist flow to the region (Zheldibayev et al., 2024; Moldagaliyeva et al., 2024). However, tourism development in the region is hindered by weak transport infrastructure, a shortage of qualified staff, insufficient marketing and institutional gaps in governance (Aktymbayeva et al., 2021; Sakypbek et al., 2025).

The theoretical basis for destination development is provided by R. Butler's tourist area life cycle concept, according to which a destination passes through stages of development and, without planned management, its resources deteriorate and its attractiveness declines (Butler, 1980). From the perspective of tourism geography, the spatial balance between tourism demand and supply, the accessibility of infrastructure and the pressure on the natural environment are considered key issues of regional planning (Hall & Page, 2014), while event tourism is viewed as an additional factor in enhancing destination competitiveness (Getz, 2008). Since small enterprises form the core of tourism supply, their management practices, competencies and access to state support determine the quality of regional tourism (Ateljevic, 2007; Thomas et al., 2011; Koens & Thomas, 2015).

Studies from Kazakhstan confirm these trends. Research on small tourism businesses in Almaty showed that most entrepreneurs lacked specialized tourism knowledge and a marketing plan (Issakov et al., 2023). Interviews with stakeholders in Almaty city and region identified institutional fragmentation, non-transparent permitting procedures and weak trust between the state and business as the main barriers (Sakypbek et al., 2025). A similar survey-based study in the Akmola region showed that, despite natural attractiveness, infrastructure deficits limit destination competitiveness (Dyussekeyeva et al., 2025), while a study of the Kazakhstan section of the Great Silk Road focused on the relationship between tourists' satisfaction with infrastructure and the socio-economic benefits of tourism (Moldagaliyeva et al., 2024). Work analysing the life cycle of ecotourism emphasizes the importance of managing the load on natural sites (Mukhambetov et al., 2014).

However, previous studies on the Almaty region have mostly focused on the city level, on individual types of tourism or on stakeholder interviews; comprehensive assessments that combine the broad opinions of local residents and tourists with strategic analysis tools (SWOT and TOWS) remain scarce. Accordingly, the aim of this study is to identify the strategic priorities for developing the tourism industry in the Almaty region on the basis of demand-side empirical data. To achieve this aim, the following objectives were set:

- to analyse the scientific literature and strategic documents on the tourism potential of the Almaty region and its development;
- to identify the needs and opinions of tourists and local residents through a questionnaire survey;
- to determine the main factors hindering tourism development in the region;
- to propose specific strategic directions for tourism development based on SWOT and TOWS analysis.

Thus, by combining demand-side empirical data with strategic analysis, the article provides an evidence base for regional-level tourism planning and contributes to filling this gap in regional tourism geography.

2 Materials and methods

2.1 Study area

The study area is the Almaty region, located in south-eastern Kazakhstan. The southern part of the region is occupied by the Ile Alatau, Kungey and Ketmen ranges, while the Ile River valley and the Kapshagay Reservoir lie in the north. This altitudinal zonation makes it possible to develop several types of tourism simultaneously, including mountain, ecological, health and wellness, cultural-historical and

rural tourism. In 2022, the Zhetysu region was established on the basis of the north-eastern part of the region. The study used the boundaries of the region prior to the 2022 administrative-territorial changes, because respondents traditionally perceive sites now belonging to the Zhetysu region, such as Altyn-Emel National Park and Panfilov district, as part of the Almaty tourism area.

2.2 Research design

The study followed a mixed-methods design combining quantitative survey data with qualitative strategic analysis and was conducted in four stages:

- Stage 1 – analysis of the scientific literature and strategic documents (to form the theoretical basis and the external factors of the SWOT analysis);
- Stage 2 – development of the questionnaire and its expert pilot testing;
- Stage 3 – collection of primary data through an online survey;
- Stage 4 – data processing, descriptive statistical analysis, SWOT analysis and formulation of strategic directions using a TOWS matrix.

2.3 Data sources

The primary data source was the survey conducted by the authors. Secondary data included peer-reviewed scientific publications and the Concept for the Development of the Tourism Industry of the Republic of Kazakhstan (Government of the Republic of Kazakhstan, 2023). The literature was retrieved from the Scopus, Web of Science and Google Scholar databases using the keywords "Almaty region tourism", "tourism development Kazakhstan", "small tourism firms" and "SWOT analysis tourism". The selection criteria were: (1) direct relevance to regional tourism development; (2) publication in a peer-reviewed outlet with a DOI or a stable link; and (3) priority for works published in 2018–2025, with earlier publications used only as foundational theoretical works (Butler, 1980; Ateljevic, 2007).

2.4 Data collection methods

The questionnaire consisted of 15 closed-ended questions divided into two blocks (Table 1). The first block (questions 1–3) covered the socio-demographic characteristics of respondents (age, gender, place of residence), while the second block (questions 4–15) assessed the current state of tourism in the region and its development priorities. A single answer option was allowed for each question.

Table 1. Structure of the questionnaire

Block	No.	Question	Figure
I. Socio-demographic	1	What is your age?	1(a)
	2	What is your gender?	1(b)
	3	Are you a resident of the Almaty region?	2
II. State of tourism and development priorities	4	What are the main barriers to the development of tourism in the Almaty region?	3
	5	Which tourist sites in the Almaty region do you prefer to visit most often?	5
	6	Which type of tourism should be prioritized in the Almaty region?	4
	7	What measures are needed to attract more tourists to the Almaty region?	6
	8	Where do you obtain information about the tourism potential of the Almaty region?	7
	9	How do you rate the quality of tourist services in the Almaty region?	8
	10	How should tourism infrastructure in the Almaty region be developed?	9
	11	Is training of tourism sector employees important?	10
	12	What role should the state play in developing tourism in the Almaty region?	11
	13	What measures should be taken to protect natural attractions?	12
	14	In which districts of the Almaty region should tourism be developed?	13
	15	Which foreign experience could be used to develop tourism in the Almaty region?	14

Source: compiled by the authors.

The questionnaire was created on the Google Forms platform (<https://docs.google.com>) and distributed through WhatsApp groups; that is, convenience and snowball sampling were applied. The survey was

conducted from October to December 2025 and yielded 503 fully completed responses. Participation was voluntary, the survey was anonymous, and no personally identifiable data were collected.

2.5 Data processing and analysis

Responses were exported from Google Forms to Microsoft Excel and checked for completeness. Relative frequencies (%) of answer options were calculated for each question and presented as bar or pie charts. To assess the statistical precision of the proportions, the margin of error (e) at the 95% confidence level was calculated as follows:

$$e = z \cdot \sqrt{p(1-p)/n} = 1.96 \cdot \sqrt{(0.25/503)} \approx 0.044 \quad (1)$$

where $z = 1.96$ is the value corresponding to the 95% confidence level, $p = 0.5$ is the proportion yielding maximum variance, and $n = 503$ is the sample size. Hence, the margin of error of the obtained proportions is approximately ± 4.4 percentage points. Because non-probability sampling was used, this figure is indicative.

The strategic analysis was carried out in two steps. First, a SWOT analysis was performed: internal factors (strengths and weaknesses) were derived from the survey results (barriers, service quality, infrastructure, staff) and the resource characteristics of the area, while external factors (opportunities and threats) were derived from strategic documents and the literature (Helms & Nixon, 2010). Second, internal and external factors were matched in a TOWS matrix to formulate SO, WO, ST and WT strategies.

2.6 Tools and software

Google Forms was used for data collection, WhatsApp for distribution, and Microsoft Excel for data processing, calculations and chart construction.

3 Results

3.1 Socio-demographic profile of respondents

A total of 503 people of different age and gender groups took part in the survey. The largest share of respondents (33.6%) were young people aged 18–24 (Figure 1a), which indicates young people's strong interest in travel and their role as one of the main consumer groups of the tourism industry. The 35–44 age group ranked second (24.9%); this group typically comprises middle-aged people travelling with family members or friends. The share of the 25–34 age group (20.5%) is also considerable, as this category includes economically active travellers. Respondents aged 45–54 accounted for 15.5%, and those over 55 for 5.6%; this may indicate that older people travel less or that existing tourist services are insufficiently adapted to their needs. Most respondents were women (72.6%), while men accounted for 27.4% (Figure 1b).

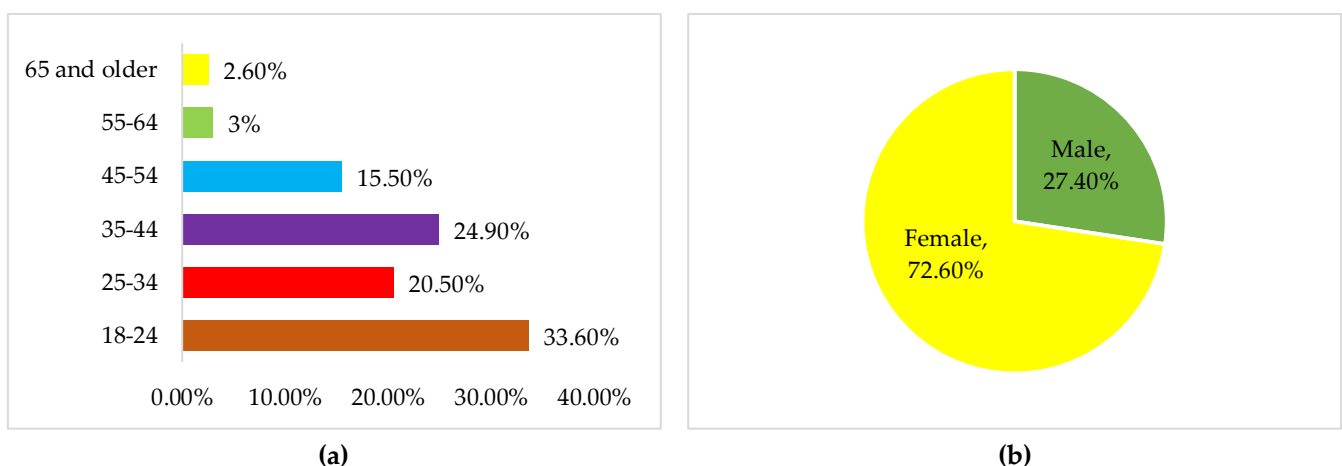


Figure 1. Socio-demographic structure of respondents: (a) distribution by age group; (b) distribution by gender

These data point to the need to develop differentiated tourism products that take into account the needs of different age groups: active tourism (hiking, adventure sports) for young people, family holidays for middle-aged groups, and comfortable leisure facilities for older people.

Of the respondents, 84.7% were residents of the Almaty region, while 15.3% came from other regions (Figure 2). This shows that the opinions of domestic tourists and local residents prevail; therefore, the results primarily reflect the needs of the region's domestic tourism market. The opinions of non-resident respondents partly capture the perspective of visitors to the region.

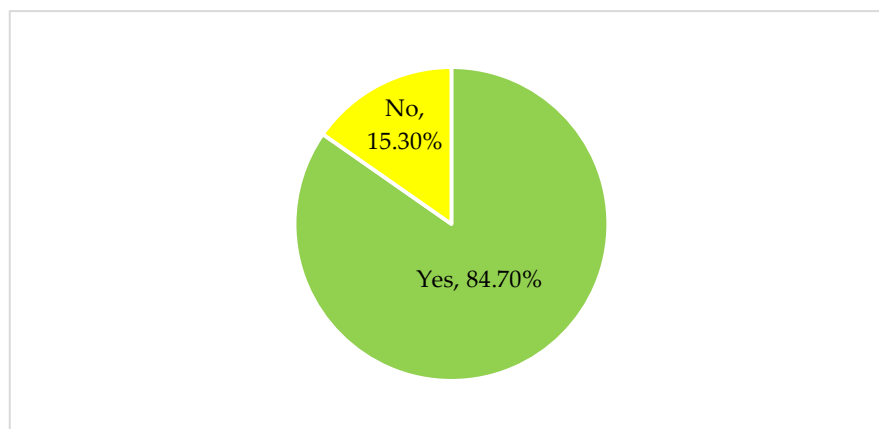


Figure 2. Distribution of respondents by place of residence (resident of the Almaty region: yes/no)

3.2 Barriers to tourism development

The survey identified several key factors hindering the development of tourism in the Almaty region (Figure 3). The largest share of responses referred to the lack of road and transport infrastructure (25.0%). Poor road quality and inconvenient transport connections make the region less attractive to tourists and reduce travel comfort. The low quality of tourist services (21.3%) was also rated as a significant problem, since service quality directly affects tourists' experience and their intention to return. Natural resource protection issues (20.5%) and insufficient information campaigns (19.5%) ranked third and fourth, while the shortage of qualified staff was mentioned by 13.7% of respondents.

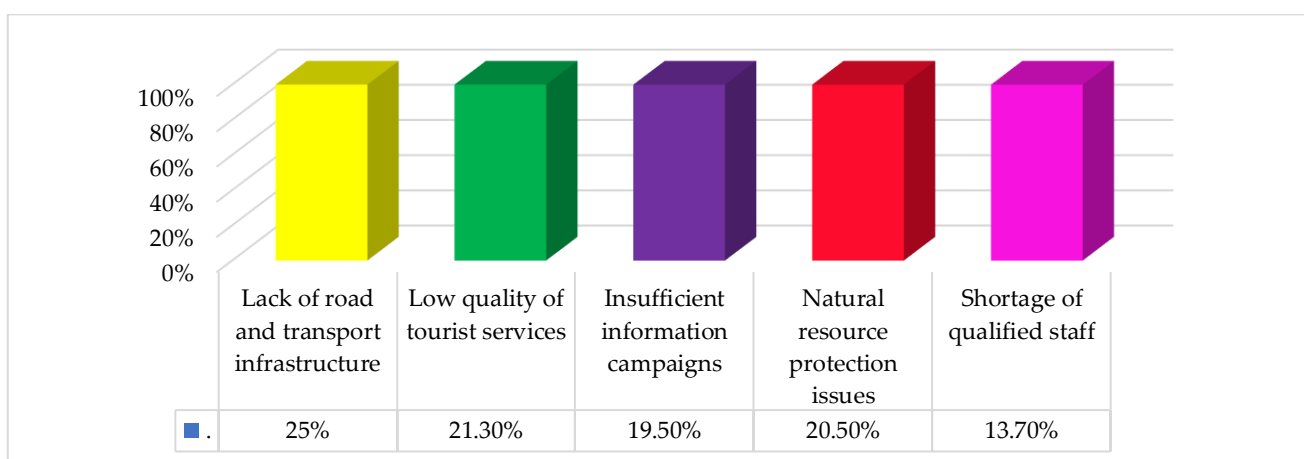


Figure 3. Factors hindering the development of tourism in the Almaty region

3.3 Tourism demand: priority types and sites

According to respondents, health and wellness tourism is the most demanded type of tourism in the Almaty region (33.6%) (Figure 4). The region's mountain climate, mineral waters and sanatoriums create favourable conditions for this type of tourism. Ecotourism (20.9%) and cultural-historical tourism (20.7%)

ranked second. Ecotourism makes it possible to combine nature conservation with tourism activities, while cultural-historical tourism can perform an educational function by introducing the region's history and traditions. Demand for adventure tourism (14.9%) and rural tourism (9.9%) is relatively low: adventure tourism targets a specific audience, whereas rural tourism requires dedicated infrastructure and support.

The sites most frequently chosen by tourists are the Kolsai Lakes (25.8%) and Charyn Canyon (25.4%) (Figure 5). Kaindy Lake (20.3%) and Kapshagay (19.1%) are also in high demand, while Altyn-Emel National Park was chosen by only 9.3% of respondents. The concentration of more than half of the demand (51.2%) on two sites may lead to increased recreational pressure; therefore, it is important to distribute the tourist flow more evenly across the territory through alternative routes.

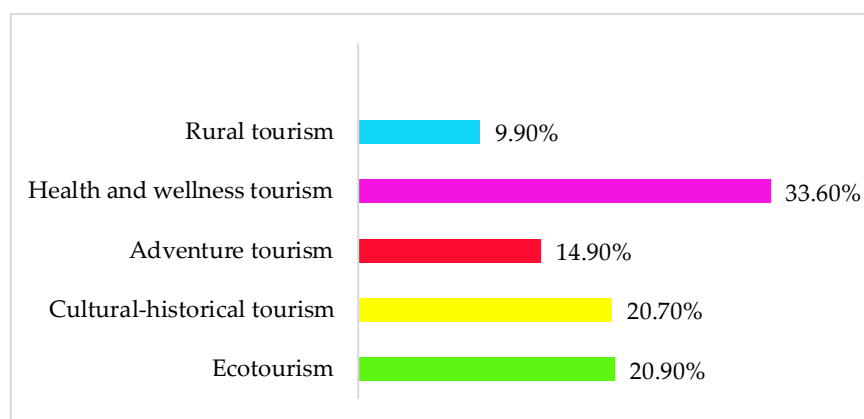


Figure 4. Types of tourism that should be prioritized in the Almaty region

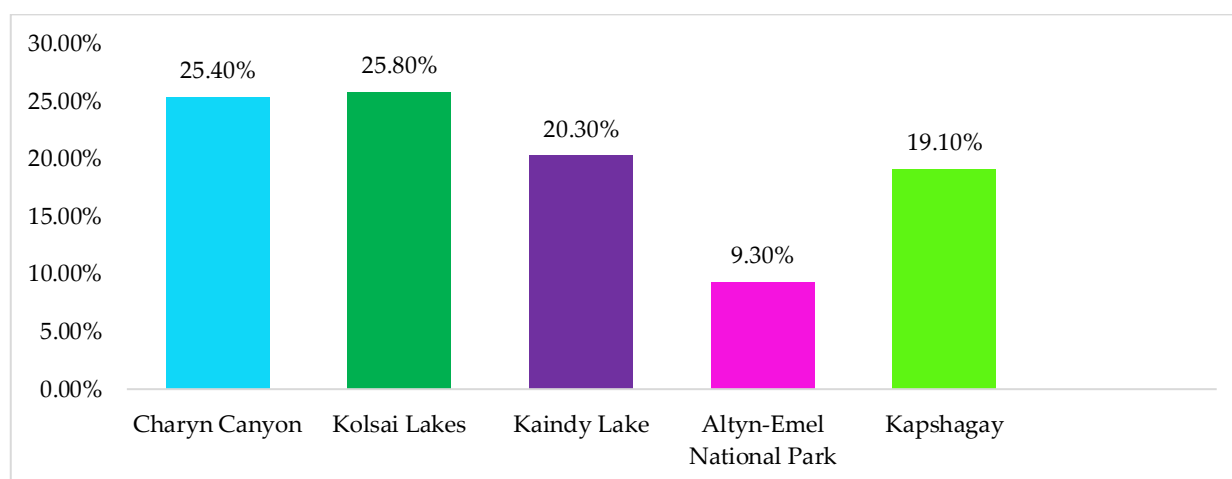


Figure 5. Tourist sites in the Almaty region most frequently visited by respondents

3.4 Measures to attract tourists and information sources

The most important measures for attracting more tourists to the region were improving service quality (23.1%), strengthening the protection of natural monuments (21.3%) and organizing advertising campaigns (21.1%) (Figure 6). Developing new tourist routes (20.9%) and improving roads (13.7%) were also rated as measures that facilitate tourist mobility and make access to the region more convenient.

Social media is the main source of information about the region's tourism potential (52.9%) (Figure 7). The shares of respondents using advertising posters and banners (18.1%), recommendations from friends and acquaintances (13.5%) and local travel agencies (12.5%) are considerably lower, while television and

radio were mentioned by only 3.0%. This highlights the decisive role of digital tools in promoting the region's tourism potential.

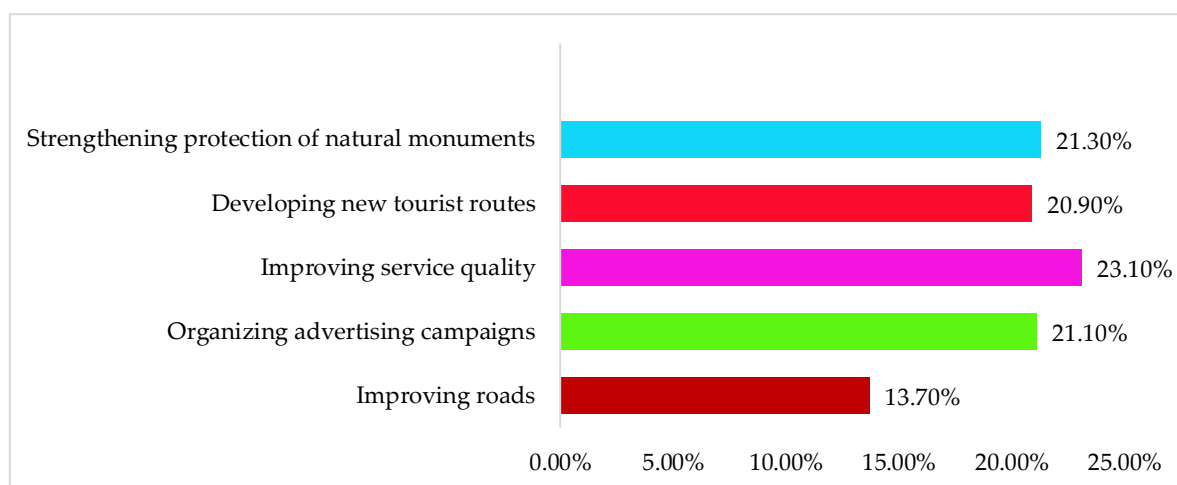


Figure 6. Measures needed to attract more tourists to the Almaty region

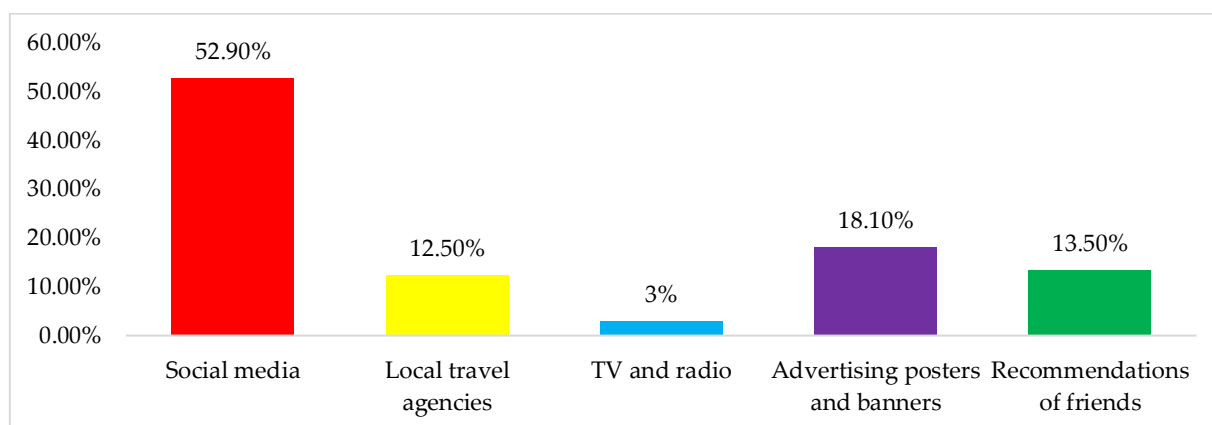


Figure 7. Sources of information about the tourism potential of the Almaty region

3.5 Service quality, infrastructure and staff

More than half of the respondents rated the quality of tourist services as "good" (31.0%) or "very good" (20.5%) (Figure 8). However, the combined share of "average" (19.7%), "poor" (15.7%) and "unsatisfactory" (13.1%) ratings (48.5%) indicates that service quality problems remain to be solved. Introducing quality standards and upgrading staff skills are important conditions for increasing the region's attractiveness.

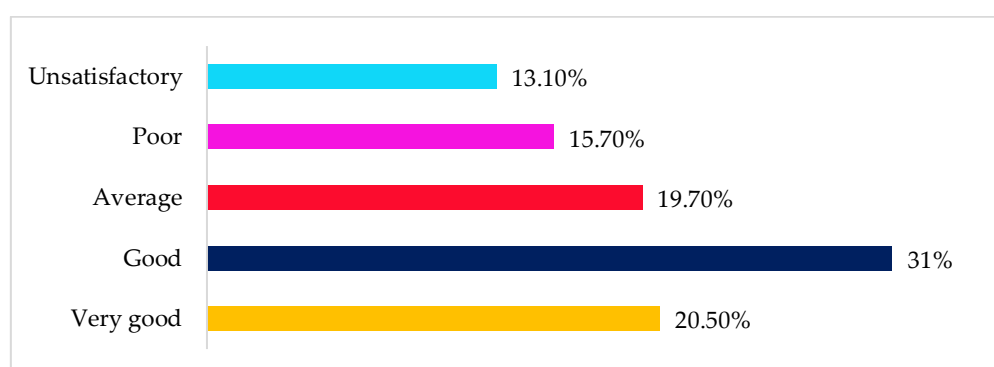


Figure 8. Assessment of the quality of tourist services in the Almaty region

Responses on priority directions for tourism infrastructure development were evenly distributed (Figure 9): increasing the number of tourist routes (21.5%), building new hotels (20.1%), opening information centres (19.7%), building public toilets and rest areas (19.5%) and improving transport (19.3%). This indicates the need to develop infrastructure comprehensively rather than along individual lines.

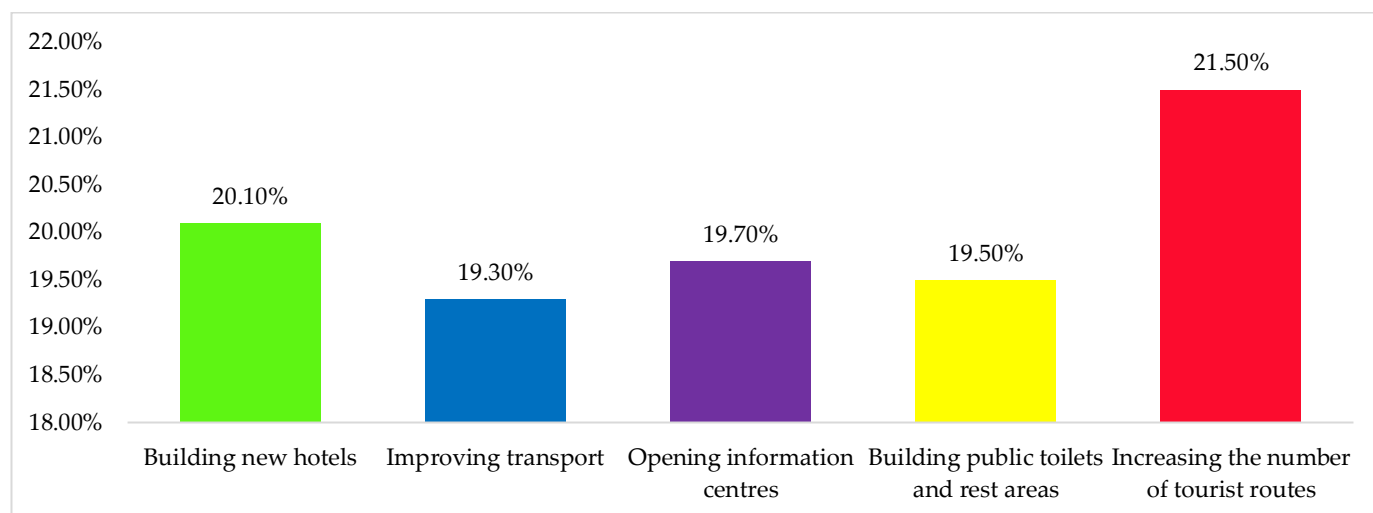


Figure 9. Priority directions for tourism infrastructure development in the Almaty region

Overall, 60.5% of respondents consider training of tourism employees "very important" (40.8%) or "important" (19.7%) (Figure 10). Those rating training as "moderately important" (13.7%), "not very important" (14.1%) or "not important" (11.7%) are in the minority. The results confirm that improving staff qualifications is one of the key tasks of tourism in the region.

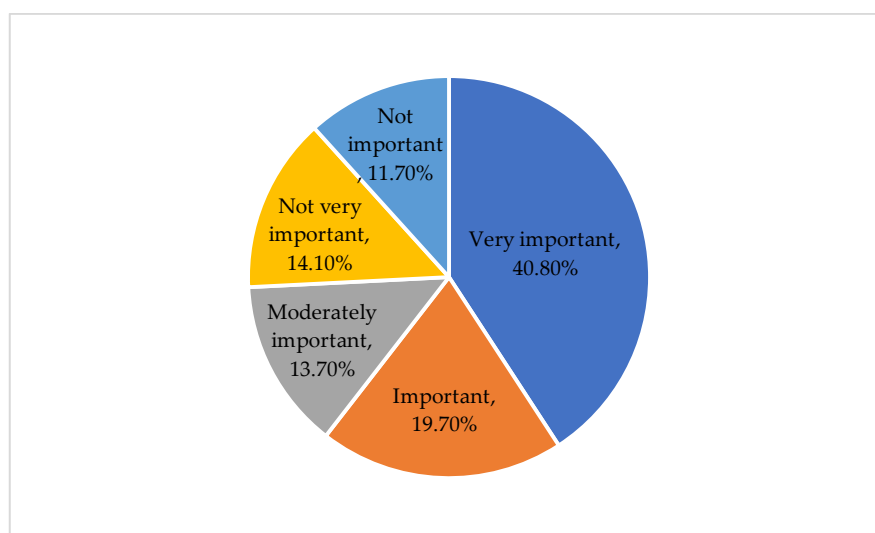


Figure 10. Assessment of the importance of training tourism sector employees

3.6 The role of the state and nature conservation

According to respondents, the state should prioritize attracting investment in tourism (40.4%) (Figure 11). Developing infrastructure (25.0%) and improving legislation (18.7%) were also named as important directions, while increasing tourism funding (9.5%) and providing marketing support (6.4%) were seen as supplementary measures.

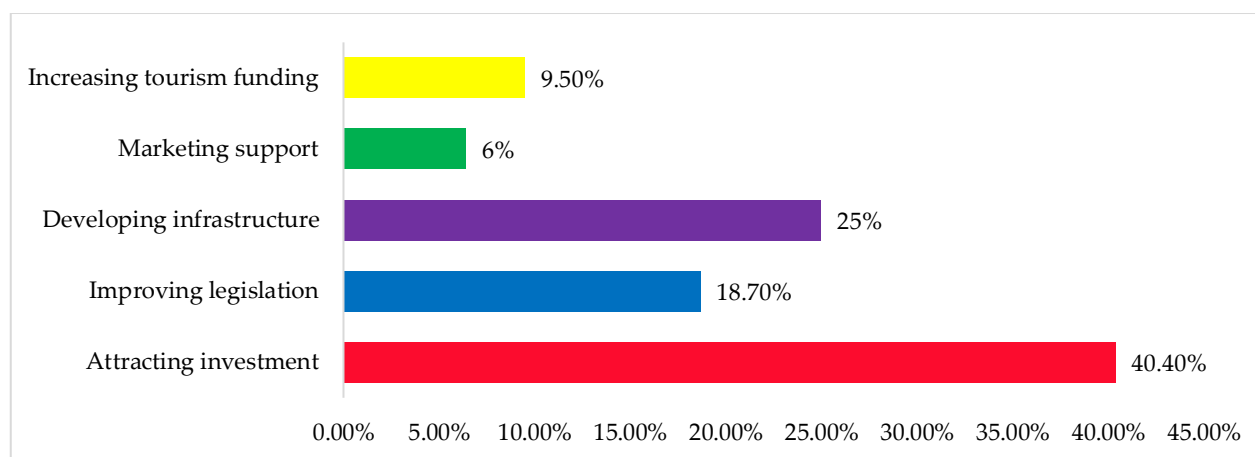


Figure 11. The priority role of the state in developing tourism in the Almaty region

Engaging local communities (21.9%) and introducing restrictions for tourists (21.7%) were named the most effective measures for protecting natural attractions (Figure 12). Developing ecotourism (21.1%), organizing educational programmes (19.7%) and establishing nature reserves (15.7%) are also among the important measures. The even distribution of responses shows that nature conservation requires a comprehensive approach rather than a single instrument.

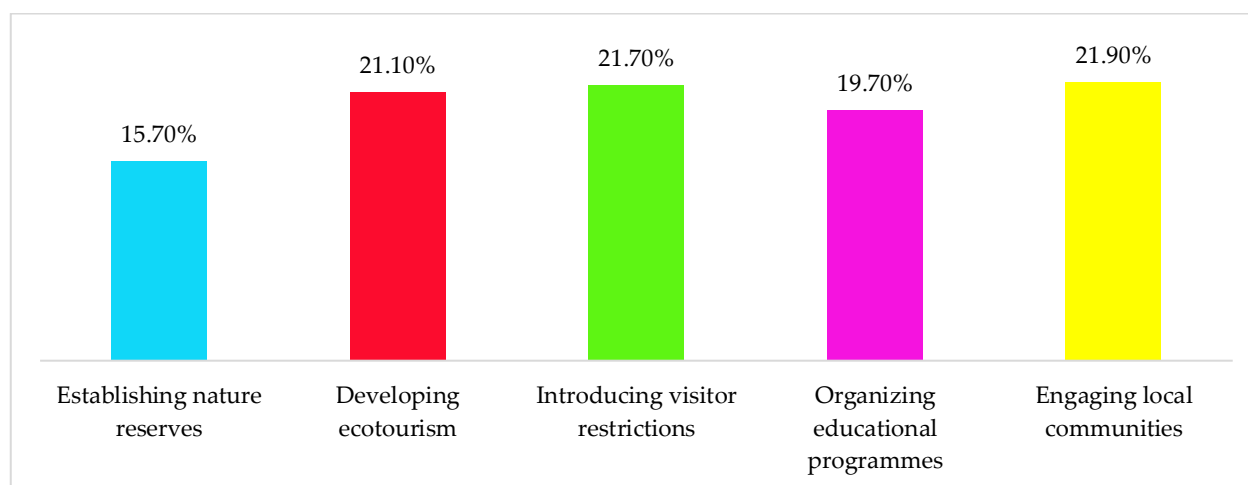


Figure 12. Effective measures for protecting natural attractions in the Almaty region

3.7 Territorial priorities and foreign experience

Talgar district was chosen by 42.5% of respondents as the district that should be prioritized for tourism development (Figure 13). Enbekshikazakh (19.5%) and Raiymbek (18.7%) districts were also rated as areas with considerable tourism opportunities, while demand for Uighur (13.7%) and Panfilov (5.6%) districts was low. The priority of Talgar district can be explained by its proximity to Almaty city and its abundance of mountain recreation sites. The results point to the need for a comprehensive development plan covering various districts of the region.

Regarding foreign experience, the largest share of respondents chose Japan's ecotourism experience (21.1%) (Figure 14). European cultural tourism models (20.3%), Swiss mountain tourism and US marketing technologies (19.9% each), and the luxury tourism strategies of Arab countries (18.9%) received similar shares. This indicates the need to adapt international experience comprehensively rather than relying on a single model.

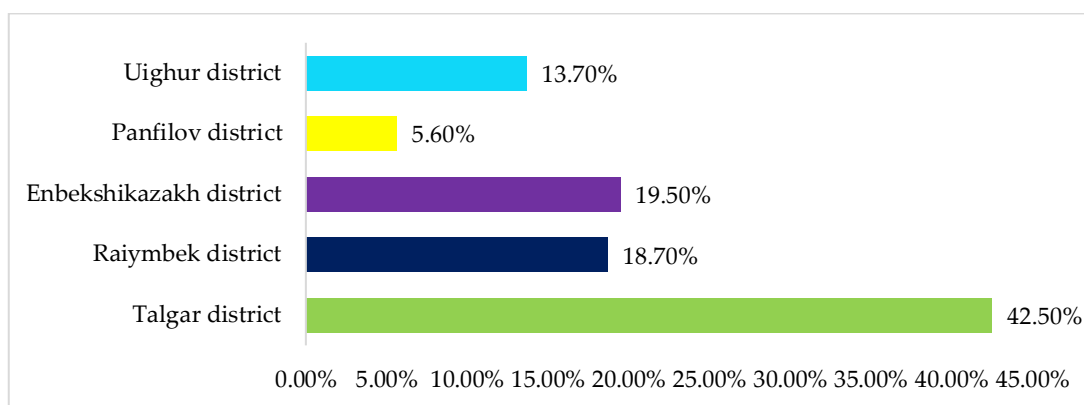


Figure 13. Districts of the Almaty region that should be prioritized for tourism development

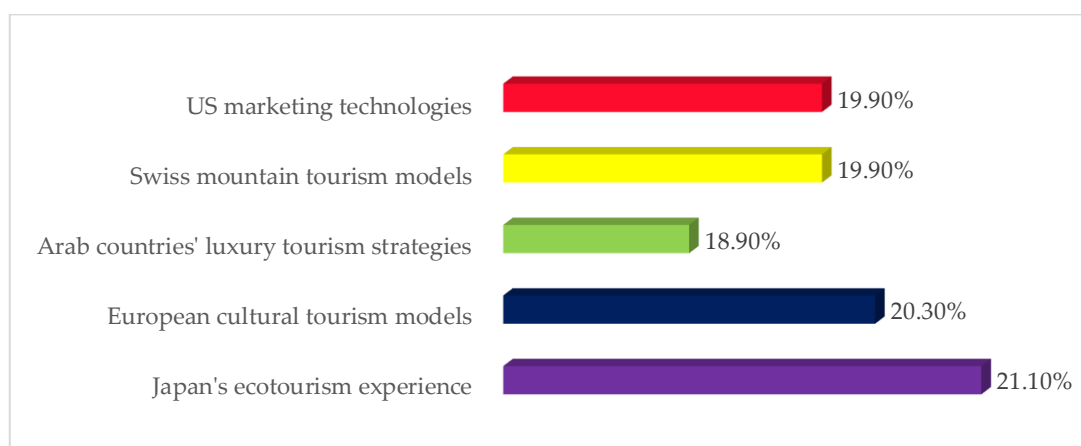


Figure 14. Foreign experience that could be used to develop tourism in the Almaty region

3.8 SWOT analysis and strategic directions

Based on the survey results and the literature review, a SWOT analysis of the tourism industry of the Almaty region was conducted (Table 2).

Table 2. SWOT analysis of tourism industry development in the Almaty region

Strengths	Weaknesses
– Abundance of natural attractions: Kolsai, Kaindy, Charyn Canyon, Altyn-Emel National Park; – Favourable geographical location close to the Almaty agglomeration; – Diverse natural and climatic conditions enabling several types of tourism; – Historical and cultural monuments (Tamgaly petroglyphs, Koilyk ancient settlement); – High demand for health and wellness tourism (33.6%).	– Insufficient road and transport infrastructure (25.0%); – Uneven service quality (48.5% rated it average or lower); – Shortage of qualified specialists; – Insufficient information and advertising about tourist routes; – Concentration of tourist demand on a few sites (51.2% – Kolsai and Charyn).
Opportunities	Threats
– State support under the Concept for the Development of the Tourism Industry for 2023–2029; – Modernization of infrastructure by attracting investment; – Development of new tourist routes and ecotourism; – Development of online marketing through digital technologies and social media; – Adaptation of international experience (ecotourism, mountain tourism).	– Degradation of natural resources and growing recreational pressure at popular sites; – Increasing competition from neighbouring countries and regions; – Insufficient involvement of local communities in tourism development; – Impact of natural hazards and climate change; – Limited investment due to budget constraints.

Source: compiled by the author based on the survey results and the literature.

The results of the SWOT analysis were translated into specific strategic directions using a TOWS matrix (Table 3).

Table 3. Strategic directions for tourism industry development in the Almaty region (TOWS matrix)

Strategy type	Strategic direction and key measures	Survey evidence
SO (strengths + opportunities)	Develop ecotourism and health and wellness tours based on unique natural sites; promote them through social media and digital platforms; offer short weekend routes from Almaty city.	Figures 4, 5, 7
WO (weaknesses + opportunities)	Modernize road, sanitary and recreational infrastructure through public-private partnerships and investment; introduce training programmes for tourism employees; adopt service quality standards.	Figures 3, 8, 9, 10, 11
ST (strengths + threats)	Involve local communities in tourism; regulate visitor numbers at popular sites (online booking, permit system); organize environmental education programmes.	Figure 12
WT (weaknesses + threats)	Distribute the tourist flow evenly across the territory by developing new routes in Enbekshikazakh, Raiymbek and Uighur districts; establish a system for monitoring natural and climate risks and ensuring tourist safety.	Figures 5, 13

Source: compiled by the authors.

4 Discussion

The results are largely consistent with previous studies on regional tourism in Kazakhstan. The lack of infrastructure, especially transport accessibility, was also identified as the main constraint on destination development in the Akmola region (Dyussekeyeva et al., 2025), while in Almaty city the growth of tourist flows has made improving infrastructure and service quality a priority (Zheldibayev et al., 2024). The uneven service quality and the high importance attached to staff training (60.5%) in our study complement the findings on the lack of specialized knowledge and marketing planning in small tourism businesses in Almaty (Issakov et al., 2023). This is also consistent with international evidence that the management capacity of small enterprises determines the quality of the regional tourism product (Ateljevic, 2007; Thomas et al., 2011).

Respondents' association of the role of the state primarily with attracting investment and improving legislation is consistent with stakeholders' views on institutional barriers in the Almaty region (Sakypbek et al., 2025). At the same time, the finding that the contribution of small enterprises to local economic development is limited without state support (Koens & Thomas, 2015) substantiates the importance of the proposed WO strategy.

From the perspective of Butler's life cycle model, the concentration of demand on Kolsai and Charyn indicates that these sites are in the development or consolidation stage and risk losing their attractiveness without load management (Butler, 1980). Respondents' support for restricting visitors and engaging local communities is in line with findings on the need to ensure a sustainable life cycle of ecotourism (Mukhambetov et al., 2014). The dominance of social media among information sources (52.9%) shows the need to shift tourism marketing to digital channels, while the high demand for health and wellness tourism suggests an opportunity to turn the region's balneological and mountain-climatic resources into new tourism products. The fact that the positive economic effect of tourism is fully realized only when infrastructure and service quality are ensured (Baiburiev et al., 2018; Laut et al., 2021) also confirms that the proposed strategies should be implemented in an integrated manner.

5 Conclusion

The results show that the Almaty region has great potential for tourism development owing to its abundant natural attractions, cultural-historical heritage and proximity to the Almaty agglomeration. The survey of 503 respondents identified the lack of road and transport infrastructure, uneven service quality

and natural resource protection issues as the main barriers to tourism development. Improving service quality, protecting natural monuments, organizing advertising campaigns through digital marketing and developing new routes were rated as priority measures.

Based on the SWOT and TOWS analysis, four strategic directions for developing the region's tourism industry were proposed: (1) promoting ecotourism and health and wellness products based on unique natural sites through digital channels; (2) modernizing infrastructure and training staff through public-private partnerships; (3) engaging local communities and managing visitor pressure at popular sites; and (4) distributing the tourist flow evenly across districts and managing natural and climate risks. These results can be used in the development of regional tourism programmes.

The study has several limitations. First, since the survey used a convenience sample distributed via WhatsApp, the results cannot be fully generalized to all residents and tourists of the region. Second, women (72.6%), young people aged 18–24 (33.6%) and residents of the region (84.7%) predominate in the sample, and foreign tourists were not considered as a separate group. Third, the analysis was limited to descriptive statistics and was based on cross-sectional data. In addition, the study did not directly capture the views of tourism businesses and government bodies.

Future research should use stratified probability sampling, include foreign tourists and tourism business representatives, and apply multivariate statistical methods such as factor and regression analysis to assess the relationship between barriers and tourist satisfaction. Furthermore, GIS-based assessment of the transport accessibility of tourist sites and of the recreational carrying capacity of popular sites such as Kolsai and Charyn is a relevant direction for further research.

Author contributions statement:

Name of Author	C	M	So	Va	Fo	I	R	D	O	E	Vi	Su	P	Fu
Lóránt Dénes Dávid	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		

C : Conceptualization

M : Methodology

So : Software

Va : Validation

Fo : Formal analysis

I : Investigation

R : Resources

D : Data Curation

O : Writing - Original Draft

E : Writing - Review & Editing

Vi : Visualization

Su : Supervision

P : Project administration

Fu : Funding acquisition

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