

# Tourism development in Kazakhstan

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**Abstract** | The Republic of Kazakhstan is an oil exporting country, and in the present context, it attempts to diversify its economy by developing other sectors. Among them, tourism industry has been identified as one of the key sectors with high potential in generating income to the country. Therefore, the Government of the Republic of Kazakhstan has given a special emphasis to tourism since the last decade through the development of tourism support strategies and programs.

The overall aim of this study is to examine the tourism development potentials of the Republic of Kazakhstan during the last decade, with reference to the Shchuchinsk-Burabay resort area, located in Akmola region of northern Kazakhstan. Furthermore, the paper highlights the challenges confronting the country and provide some recommendations for authorities and tourism businesses for successful tourism development.

**Keywords** | Tourism development, Kazakhstan, Shchuchinsk-Burabay resort area

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## 1. Introduction

Kazakhstan, considered as the world's largest landlocked country without outfall to the ocean and world's ninth largest country in terms of land area, is an emerging tourist destination. Moreover, the nomadic lifestyle and rich history of Kazakh people, have led to an exceptional and authentic culture of the region. The potentials for Kazakhstan's tourism are rich and diverse. The country has opportunities for the development of many types of tourism, such as ecotourism, nature-based tourism, lake tourism, medical tourism, cultural tourism, educational, entertainment and others. Given the importance of tourism industry, the Government of the Republic of Kazakhstan supports its development and has issued a number of strategies and programs.

The Republic of Kazakhstan is an oil exporting economy, and in the present context, aims at diversifying the national economy through tourism clusters' policy implementation in several regions. Among the regions, a special attention has been given to the Shchuchinsk-Burabay resort area, located in Akmola region of northern Kazakhstan, as a high priority area for tourism with its unique natural and cultural heritage. The region occupies a territory that is extremely favorable for development of tourist businesses. The resort area has convenient geographic location, unique natural and climatic conditions, beautiful landscape with magnificent combinations of rocky mountains, pine forests, lakes with convenient beaches and recreational areas. Nevertheless, natural resources, rich cultural and historical heritage are not sufficient for the tourism development for the country and its regions. Thus, an analysis of tourism potentials, its present development along with the main challenges can be useful for the authorities, policymakers and businesses in understanding the tourism circumstances and take certain steps towards its successful and sustainable development.

## 2. Tourism sector in Kazakhstan

Tourism is one of the world's largest industries and one of the fastest growing economic sectors over the last six decades. It is currently one of the main agents for regional development and stimulates new economic activities for many countries. In 2017, tourism made a significant contribution to the world's GDP by 10% and constitutes 10% of world's total jobs, as one of the largest employers (UNWTO, 2018). According to the World Tourism Organization (UNWTO) Barometer Report, the international tourism figures have greatly increased. International tourist arrivals have grown up from 25 million in 1950 to 1,326 million in 2017, while international inbound tourism revenues have increased from US\$ 2b in 1950 to US\$ 1,340b in 2017. Furthermore, a significant contribution to GDP - employment, export and investments in tourism are forecasted to increase in the future. Accordingly, the role of tourism in the economic development of countries cannot be easily ignored. Tourism influences social development and contributes to the preservation of cultural and historical heritage.

In this context, several countries prioritize tourism as one of the engines of economic and social growth. An example is the Republic of Kazakhstan, which is an emerging and still unexplored destination for visitors. The peculiarities of Kazakhstan have gifted the country with vast opportunities in developing diverse offers in travel and tourism, such as nature-based activities, including ecotourism and birdwatching in national parks and protected areas, authentic cultural tourism, skiing or hiking in the mountains, water sports, sunbathing, and swimming, among others (Visit Kazakhstan, 2018). The territory of Kazakhstan is divided into Southern, Northern, Western, Eastern and Central regions. Each region has a great potential for tourism development, with the presence of historical sites, monuments, attractive landscapes, nature resources such as unique lakes and rivers (Ku-

ralbayev et al., 2017).

Kazakhstan constitutes an interesting case study, because of its history, geographical position and size. As the world's largest landlocked country located in the center of Eurasia, Kazakhstan has national administrative divisions composed of 14 regions and 2 cities (Astana and Almaty). Astana, the capital, and Almaty, the largest city (and former capital), are administratively independent with statuses comparable to a region. Almaty City concentrates an important share of the country's total population. It is considered one of the most important business and financial centers, located in the southeast of the country.

The territory of the state can be divided into four landscape zones: deserts (which covers around 44% of the national territory), steppes (26%), semi-deserts (14%), and forests (5.5%). The tourism activity is mainly based on natural attractions (such as its varied and unique geographical landscapes, natural parks, flora and fauna, etc.), together with an exquisite and authentic cultural heritage (Azhimetova et al., 2013, Kuttybayeva, 2015). The diverse natural and cultural resources constitute its primary tourist attractions and tourists usually try to witness nature and immerse in a rich natural, cultural and historical experience. Numerous national parks and more than nine thousands historical and archeological monuments are located in the territory (Abubakirova et al., 2016). Moreover, the country is characterised by number of natural recreational resources for the development of health tourism. Nowadays, there are 89 known sources of mineralised water treatment in Kazakhstan, used for drinking and balneological purposes, as well as 47 deposits of therapeutic muds. There are around 120 sanatoriums, which operate on the basis of these mineral resources (Yessengabylova et al., 2016). In this regard, we can state that the natural environment plays a major role in the Kazakhstan's tourism industry and constitutes its main competitive advantage. Environmental sustainability must be a key issue

in the national tourism policy.

As stated, Kazakhstan's economy is based mainly on the export of raw materials and energy resources. The country is rich in natural resources: oil and gas, copper, gold, zinc and uranium among others. It is blessed with four seasons and its different topographical zones favor production of wheat and crops. However, globalisation and competitive international trends require the development of other sectors. Attempts are being made to achieve this through the development of competitive clusters in other economic sectors, including tourism. During the last years, development of the tourism sector constitutes a high priority for policymakers, and considered to be the second main driving force (after the energy sector) for the future, to increase the national GDP and boost the economy (Abubakirova et al., 2016, Syzdykbayeva et al., 2015). The government of Kazakhstan has developed several strategies and programs such as legislation "on tourist activity in the Republic of Kazakhstan, the concept of development of the tourism industry of the Republic of Kazakhstan until 2023" (Department of Tourism in Akmola, 2018). The main purpose of these strategies and programs is to promote the development of a competitive and modern tourism industry, totally integrated into the global tourism market.

As a result of the government's initiatives, tourism has increased in the country both in terms of tourist arrivals and income during the last decade (Abubakirova et al., 2016). According to the World Economic Forum's Travel and Tourism Competitiveness Report (2017), Kazakhstan is on the 81<sup>st</sup> place out of 136, which is four positions higher compared to the previous period (WEF, 2017). Some figures can illustrate the evolution of tourism. The number of international tourist arrivals increased to 7,701 million, which is 18% higher than in previous year. Kazakhstan was the host of the international exhibition "Expo 2017", called "Future Energy" in 2017, which enhanced the country's recognition as a tourist destination.

Furthermore, the strategies and programs developed by the government have pushed up many private initiatives in Kazakhstan's tourism industry. As a result, the range of services offered by local tour operators kept on increasing from year to year. For example, the number of tourism establishments has reached 2,987 in 2017, which is 8% higher than in 2016 (UNWTO, 2018). We can also observe a significant positive trend in the accommodation industry, where both quantitative and qualitative growth are observed during the decade (Table 1). Accordingly, the number of placements recorded increased from 239 to 2,997 (only 13% of all establishments is categorized by star ratings), with an average annual growth of 20%. The number of rooms increased from 11,104 to 66,555, with an average annual growth of 14%,

while the number of beds increased from 22,172 to 154,625, with an average annual growth of 15% during 2003-2017 (Committee on Statistics of Kazakhstan, 2018). Furthermore, the number of overnight tourists in accommodation establishments has increased from 1,034,168 to 5,279,406 in the period 2004-2017, with an average annual growth of 14.57% (Figure 1). However, in comparison to other world tourist destinations, for 2008 and 2009, the international tourist arrivals present a negative growth rate of 2.43% and 10.48% respectively, due to the negative impacts of the worldwide financial and economic crisis. However, in 2010, the number of tourists once again started to increase, and the growth continued until 2017 with placement rates of 2,997 units, 66,555 rooms, and 154,625 beds.

**Table 1** | Evolution of accommodation sector in Kazakhstan (data by regions)

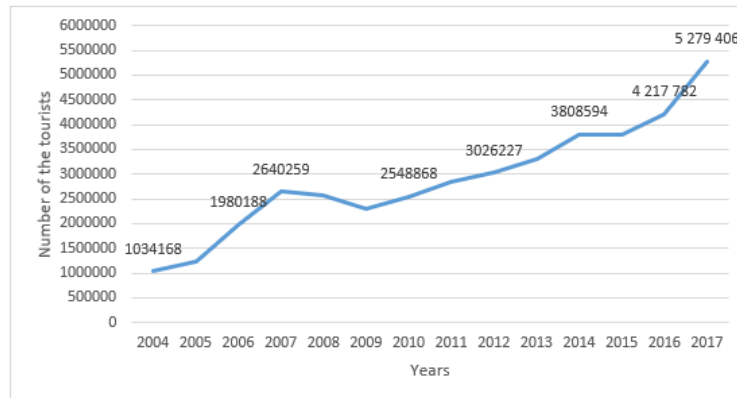
Region	Number of placements			Number of rooms			Number of beds		
	2003	2017	Average annual growth (%)	2003	2017	Average annual growth (%)	2003	2017	Average annual growth (%)
Akmola	6	338	33	347	5 016	21	612	12 440	24
Aktobe	4	95	25	357	1 862	13	448	4 465	18
Almaty	14	452	28	397	8 023	24	1 247	21 228	22
Atyrau	27	80	8	608	2 643	11	774	4 074	13
West Kazakhstan	3	71	25	190	1 503	16	310	2 863	17
Zhambyl	12	152	20	360	1 809	12	683	3 379	12
Karaganda	24	228	17	860	4 714	13	1 807	11 686	14
Kostanay	3	121	30	252	2 050	16	478	6 055	20
Kyzylorda	12	91	16	186	1 016	13	313	1 796	13
Mangistau	9	77	17	285	2 841	18	363	5 207	21
South Kazakhstan	14	209	21	614	3 553	13	1 042	8 910	17
Pavlodar	11	98	17	325	2 907	17	584	7 209	20
North Kazakhstan	4	96	25	177	1 437	16	268	4 180	22
East Kazakhstan	34	495	21	2 214	8 905	10	5 923	27 713	12
Astana city	26	224	17	928	9 744	18	1 758	18 857	18
Almaty city	36	170	12	3 004	8 532	8	5 562	14 563	7
<b>TOTAL (Kazakhstan)</b>	<b>239</b>	<b>2 997</b>	<b>20</b>	<b>11 104</b>	<b>66 555</b>	<b>14</b>	<b>22 172</b>	<b>154 625</b>	<b>15</b>

*Calculation based on the data from the Committee on Statistics of the Republic of Kazakhstan (2018)*

Analyzing thoroughly the Kazakhstan tourism industry, we detect that most important inbound markets are Europe (96.33%), East Asia and the Pacific (2.30%), Americas (0.53%), South Asia (0.56%), Middle East (0.11%), Africa (0.03%) and other countries (0.13%) (Figure 2.). With respect to the purpose of travel, the major number

of tourists usually visit the country for holidays, leisure and recreation purposes (85%), while only 15% of tourists traveled to Kazakhstan for business and professional purposes. In 2017, the travelers spent 1,990 US\$ Mn, of which 89% was expenditure for travel purposes, and 11% for passenger transport. Expenditure for personal reasons

(91%) was higher than for professional purposes (9%) (UNWTO, 2018).



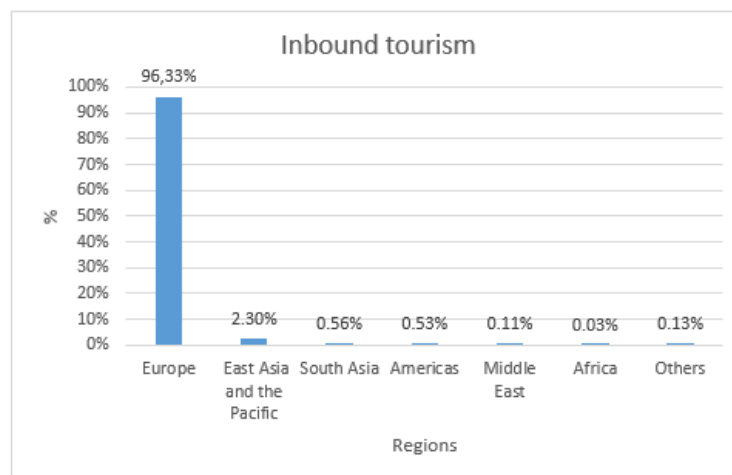
Source: Committee on Statistics of the Republic of Kazakhstan (2018)

Figure 1 | Number of the tourists on the placements for the period 2004-2017

A positive trend has been observed with regards to domestic tourism. Total number of trips reached 8,603 million in 2017, where overnight visitors (tourists) represent 87% and the same-day visitors (excursionists) represent 13%. Most of the people traveled for personal purpose (91%), while 9% of the individuals traveled for professional or business motives. Package tours are not popular

in the country and were used only by 0.02% of the travelers (UNWTO, 2018).

Analyzing Kazakhstan's outbound tourism, total number of departures in 2017 was 10,261,000, which is higher than inbound tourism. Total expenditure of Kazakhstani people in 2017 was 1,886 US\$ Mn.



Source: UNWTO (2018)

Figure 2 | Arrivals to Kazakhstan by regions in 2017

However, despite the increasing tendency of tourism development indicators in Kazakhstan, the share of tourism in the national total GDP is only nearly 1.6% (WEF, 2017). Tourism is not yet in the level of its development adequate to maximize its potentials. Natural resources, rich cultural and historical heritage cannot be sufficient for the tourism development. A similar situation in tourism sector development is facing neighboring country Uzbekistan (Sobirov, 2018). Therefore, in order to increase the role of tourism in the country's GDP, it is necessary to address some challenges such as infrastructure, technology, prices of tourism services, problems with air connectivity and lack of professional skills (Smailova, 2012; Syzdykbayeva et al., 2015). According to Abubakirova et al. (2016), one of the biggest issues of tourism in Kazakhstan is "the insufficiency of demand" due to the lack of effective marketing strategy. In this context, Sobirov (2018) emphasizes the importance of deep understanding of consumer behavior, in particular, consumer's buying decision-making process. The author believes that it will enable marketers and tourism businesses to better understand the consumer demand side and hence, develop effective marketing strategies to favor the supply side.

Furthermore, insufficiency of educated and qualified staff in tourism is another issue. Airport conditions and visa procedures should be simplified for international tourists. While some researchers indicated one of the major problems of tourism business development in the country is the lack of mechanisms for state support (Zhidkoblinova, 2013). Additional concerns are traveling conditions from one part of the country to another - which is complicated due to the poor development and poor condition of the infrastructure - roads, transport; lack of hotels of acceptable quality in small cities and towns; high prices for air travel (Kuralbayev et al., 2017) and the lack of recognition of tourism sector as an economic activity at regional levels. Therefore, a deeper look to the case of Ak-

mola region can be useful, as a region with a high potential for tourism development.

### 3. Tourism in Akmola region

Akmola region is located in the northern part of the country, established in 1939. The area of the region is 146,200 km<sup>2</sup>. The administrative center is Kokshetau city, founded in 1824. The nature of the territory varies: most parts are covered by steppes, upland, plains and river valleys, mountains covered with forests. Having such a beautiful landscape with a magnificent combination of rocky mountains, coniferous forests, lakes with attractive beaches, recreational areas; Akmola region is considered to have enough potentials for tourism development.

Akmola region, having a unique natural potential as Burabay, Zerenda and Korgalzhyn among others, is able to put its place in the international tourism map. There are opportunities to develop various types of tourism, such as hunting, fishing, water-sports and ecotourism (Department of Tourism in Akmola region, 2018).

The tourism industry in Akmola region is composed of more than 700 enterprises (356 accommodation facilities, 45 sanatorium-resort institutions, 266 subjects of roadside services, 68 travel agencies licensed to carry out tourist activities and 3 state national natural parks). As indicated in Table 2, the number of tourism companies in Akmola region has seen a general increase in recent years. The number of accommodation facilities increased up to 356, the number of rooms accounts for 5,350 and the number of beds is 13,464. The amount of services provided by accommodation facilities is 5,028,500 Kazakhstani Tenge, which is 12.3% more compared to the previous year. The number of visitors served by accommodation sites was 270,000 people (an increase of 1.6%).

Table 2 | Main indicators of tourism development in Akmola region, 2018

INDICATORS	Value 2018
Number of tourism enterprises	700
Number of accommodation facilities	356
Number of rooms	5,350
Number of beds	13,464
The volume of services provided by the accommodation sites	5,028,500
Number of served visitors in places of accommodation	270.000

Source: Department of Tourism in Akmola region, 2018

The region also contains several national natural parks, such as 'Kokshetau', 'Buiratau' and 'Burabay'. The most important and internationally well-known is the 'Korgalzhyn State Nature Reserve', included in the List of World Natural Heritage UNESCO (Department of Tourism in Akmola region, 2018).

Within Akmola region, a special attention and a high priority for development of tourism is the Shchuchinsk-Burabay resort area. It is determined by series of national policies and programmes, such as "Law on Tourist activity in the Republic of Kazakhstan", the "Concept of development of tourism in the Republic of Kazakhstan until 2023", the Tourism Development Program in Akmola region for 2017-2019", as well as the President's Nazarbayev instructions on the systematic development of Shchuchinsk - Burabay resort area until 2020. In addition, the growth of foreign investments augments the development of tourism in the region. For example, the value of some projects planned to be implemented was raised to 3 billion dollars (Abubakirova et al., 2016).

### 3.1. Potential and evolution of tourism in the Shchuchinsk-Burabay Resort Area

The Shchuchinsk-Burabay resort area is situated between 52°50'/53°10' North latitude and 70°00'/70°40' East longitude in the Akmola region, within the Burabay district, around 100 km east of Kokshetau city, the administrative centre of Akmola and 290 km from the capital Astana. The most populous towns of the district are Burabay and Shchuchinsk, with a total population of about 75,000 people (Department of Statistics in Akmola Region, 2018).

The environment of the Burabay area is suitable for various types of tourism such as ecological, health, cultural, educational, mountain, adventure and sports (Table 3). Mountainous landscape, pine forests, clean air, mountain lakes, rich hydro-mineral resources in the surrounding areas are important curative factors that attract tourists to the area (Pyatov, 2007; Ramazanova et al., 2019). In order to preserve the unique landscapes, State National Nature Park "Burabay" was established in August 2002. There are 14 lakes with the surface area over 1 square kilometer each and a number of smaller lakes are situated on the territory of the national park (Figure 3).

Table 3 | Tourism offers of Burabay Region

Typology	Main tourism assets and offerings of Burabay region
NATURE TOURS	<ul style="list-style-type: none"> <li>- Bus excursions to Khan Asuy, Abylay Khan village, Blue Way Cordon</li> <li>- A walking tour Abylaikhan Meadow - Kenesary Cave with a visit to the Blue Bay Cordon and Keresary Cave</li> <li>- Lakes: water sports, sunbathing</li> </ul>
MOUNTAIN TOURS	<ul style="list-style-type: none"> <li>- Climbing tours to Kokshetau Mountains</li> <li>- Climbing tours to Okzhetpes Mountains</li> <li>- Cycling tour along the Burabay National Park</li> <li>- Adventure Tour</li> </ul>
HORSE RIDING AND CULTURE TOURS	<ul style="list-style-type: none"> <li>- Horseback riding on the territory of Burabay National Park</li> <li>- Horseback riding on the territory of Jaylyau ethnographic village</li> <li>- Visiting museums of local history in honor of Abylay Khan</li> <li>- Visiting Nature museum</li> <li>- Visiting Shchuchinsk historical museum</li> </ul>
MEDICAL AND HEALTH TOURS	<ul style="list-style-type: none"> <li>- Holidays in Burabay health resort hotels ('sanatoriums')</li> <li>- Holidays in Shortandy health resort hotels ('sanatoriums')</li> <li>- Tours for Children in health and recreation centres</li> </ul>
ECOTOURS	<ul style="list-style-type: none"> <li>- Highlights of Akmola region</li> <li>- Shchuchunisk –Burabay resort area Lake Tour</li> <li>- Kazakh ethnographic aul</li> <li>- Burabay National Park Tour</li> </ul>
BIRD EYE VIEW TOURS	<ul style="list-style-type: none"> <li>- Birdwatching in Abylaikhan Meadow</li> </ul>

Source: Authors' elaboration from information published by Visit Kazakhstan and Department of Tourism in Akmola region



Figure 3 | The lakes of the Shchuchinsk-Burabay resort area

This area also includes an important set of hydrological resources with therapeutic and wellness properties, that made it the most important balneological area of the country, similar to other mountain balneological resorts located in other European countries like Karlovy Vary (Czech Republic), Baden-Baden (Germany), Bad Ischl (Austria), Montecatini Terme (Italy), Vichy (France) (UNESCO, 2016). This favorable natural, geo-

graphical, hydrological, and therapeutical conditions, joint with a favorable climatology, makes Shchuchinsk-Burabay one of the most important resort areas for medical and wellness tourism in the country. Thanks to these conditions, the Burabay region has been selected as a priority region for tourism development and the government has developed various strategies and programs (Department of Tourism in Akmola region, 2018).



As a result, tourism industry started to grow in the region. For example, for the period 2003-2017, the number of accommodation establishments, rooms and beds in Akmola region has the highest growth in Kazakhstan. From only 6 establishments in 2003, the region went up to 338 establishments in 2017, with an annual average growth of 33%, considering that the Shchuchinsk-Burabay resort area accounts for around 65% of all tourism infrastructure in Akmola. Some detailed figures are

indicated in Table 4. During the summer period, the population of the area increases up to five times, while during weekends it may go up to 10 times. The number of tourists using accommodation establishments has increased as well, with an average annual growth rate of 15% in Akmola and 38% in the Shchuchinsk-Burabay resort area for the period 2003-2017 (Department of Statistics in Akmola region, 2018).

**Table 4 | Indicators of tourism development in Akmola region and Burabay, 2006-2015**

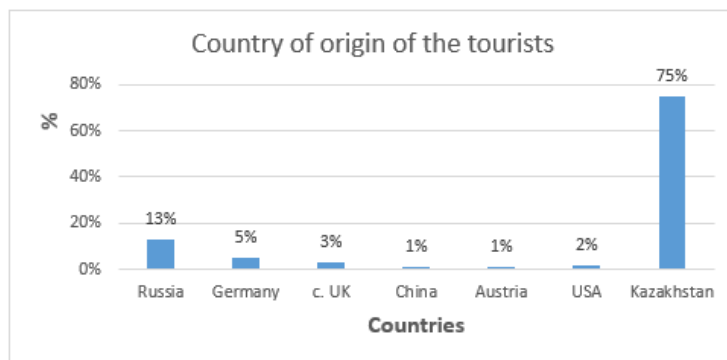
INDICATORS	2006	2015	Annual average growth
<b>Number of establishments, units</b>			
Akmola region	66	319	22%
Burabay	28	203	34%
Burabay (%)	42	64	
<b>Number of rooms, units</b>			
Akmola region	1,200	4,838	17%
Burabay	201	3,173	38%
Burabay (%)	17	66	
<b>Number of beds, units</b>			
Akmola region	2,444	12,703	21%
Burabay	367	8,704	47%
Burabay (%)	15	69	

*Source: Department of Statistics in Akmola region, 2018*

As Table 4 shows, both the Akmola region and the Burabay have experienced an annual average growth of 22% and 34%, respectively, in terms of the number of tourism sector establishments during 2006-2015. Regarding the indicators such as number of rooms and beds, the table shows an annual average growth of 17% and 38% in Akmola region and Burabay. Consequently, a growth has been observed in the number of beds (21% for Akmola region and 47% for Burabay).

The tourism indicators show a significant growth of the tourism industry during the last ten years. Obviously, it has an economic importance, since it provides good employment opportunities and other benefits to the investors and the local

community. Nevertheless, the analysis of inbound tourism to Burabay shows that the region is still not very attractive for the foreign guests as in the case of the entire country. Domestic tourism is dominating in the region (75% of all visitors). With regard to non-resident visitors, we observe that 13% represents tourists from Russia, 5% from Germany, 3% from UK, 2% from USA and 1% from Austria and China (Figure 4). According to Department of Tourism of Akmola region, the number of the tourists to the area will increase until almost one million. However, the tourism industry will remain be attractive for the local people, which requires development of appropriate strategies and programs aiming to attract the foreign visitors.



Source: Based on survey results April/May 2016

Figure 4 | Country of origin of the customers in 2014-2015

#### 4. Conclusions

This paper aimed at providing insights from the tourism industry potentials and development in Kazakhstan, where tourism is currently, one of the leading sectors of the national economy. Tourism development indicators show a growing tendency of the industry in the country during the last decade. Nevertheless, these indicators are considered unsatisfactory, since tourism's contribution to the national GDP is only nearly 1.6%. This can be explained by a number of challenges the industry is facing such as underdeveloped tourist infrastructure, low quality and limited number of services, lack of professional staff in tourism, high prices for air travel and accommodation, inadequate marketing strategies and high dependence of tourism on the domestic market. The analysis of international inbound tourism flows to Kazakhstan shows that the country is still not an attractive destination for the foreign tourists. In this context, a highly effective destination marketing strategies are needed.

One of the unique features of Kazakhstan are its size and geographical location. The regions are blessed with attractive landscape, rich natural and cultural heritage. It is recommended to implement an integrated tourism development program both for the country and in its regions to address a number of challenges.

One of the most attractive regions Shchuchinsk-Burabay resort area, which represents a great potential to motivate tourists not only from the neighboring countries of Kazakhstan, but also from other parts of the world. Therefore, in order to better meet the needs of the tourists and enhance the attractiveness of the country and its regions, it is necessary to take further measures to promote a competitive tourist industry in the region. Certain steps should be taken towards creating and developing a competitive and attractive tourism products and services for the tourists along with active positioning of Kazakhstan as a tourism destination in the domestic and international markets. Furthermore, active collaboration with tourism educational institutions should be strengthened to guarantee trainings for the tourism industry.

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