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INTERNAL TOURISM DEVELOPMENT IN KAZAKHSTAN: DETERMINATION OF THE BARRIERS

Kazakhstan has significant potential for the development of the different types of tourism: from ecological to business. This is facilitated by a rich history that has left many archaeological and historical monuments on the territory of the country. This is ensured by the unique geographical position, thanks to which in Kazakhstan you can find untouched corners of the nature in a wide variety of landscapes. This is also achieved thanks to the development of tourism infrastructure, constant work to simplify the visa regime and many other factors. Despite the high potential of tourism sector in the Republic of Kazakhstan and richness in culture, resources, tourism has not reached the highest level of its development.

Thus, this study aims to analyze the state of tourism development in the Republic of Kazakhstan in modern conditions, to determine what hinders its development, and provide recommendations which can be useful for not both government and tourism sector, but for all tourism sector's organizations and bodies. This study is qualitative research. The data was collected through interviews both online and offline formats. After collecting the data, Atlas.ti Software was used to code the answers of the respondents. The respondents of this study are four university professors from Almaty and one former owner of travel agency. All of them have degrees in tourism field and decided to tie their lives with tourism and hospitality sector more than 15 years ago. This study has shown what barriers stop development of tourism sector in Kazakhstan based on interviews with tourism bodies.

Keywords: *tourism, travel, tourist, domestic tourism, tourism development, barriers, state support, government, perspectives, Kazakhstan.*

Кілт сөздер: *туризм, саяхат, турист, ішкі туризм, туризмді дамыту, кедергілер, мемлекеттік қолдау, мемлекет, перспектива, Қазақстан.*

Ключевые слова: *туризм, путешествие, турист, внутренний туризм, развитие туризма, барьеры, государственная поддержка, государство, перспективы, Казахстан.*

JEL classification: Z3

Introduction. The field of tourism demonstrates very high rates around the world, thereby improving the standard of living of citizens and the recognition of the country among tourists who come for various travel purposes. In consequence of tourism, money flows into the country increase, new jobs are created. For most countries of the world, tourism is becoming a paramount task for economic development and stable income generation. Tourism has various features, simultaneously performing economic, social, political, humanitarian, and other functions. It is an effective sector of the economy throughout the country, and not just in its individual regions. Thus, it has a huge impact on such key sectors of the economy as transport, communications, construction, agriculture, that is, it acts as a kind of catalyst for socio-economic development. The importance of tourism as a source of foreign exchange earnings and expansion of international contacts is constantly growing.

Tourism in Kazakhstan is now developing, especially the emergence of coronavirus infection, when the citizens of the country did not have the opportunity to travel to distant countries and they showed their interest in local attractions. However, the difficulties that arise at the present stage complicate the entire development process. Unfortunately, in Kazakhstan, tourism remains a low-income. The contribution from tourism sector to GDP of Kazakhstan remains insignificant: 5.5%, which is less than those countries where tourism is the foundation of economic development [1]. It is difficult for non-foreigners and local citizens to visit the beautiful places of our country if they are not told, written, or shown in a way that arouses interest, and the internal tourism of the country is unfortunately not at a high level to be proud of. That is why tourism is one of the most pressing issues in Kazakhstan today, so we decided to consider the current achievements and shortcomings of Kazakhstan's domestic tourism.

The authors have carried out qualitative research both online and offline format using 7 main questions to guide the interviews. Considering all the above mentioned, this study aims to analyze the state of tourism development in the Republic of Kazakhstan in modern conditions, to determine what hinders its development, and provide recommendations which can be useful for not both government and tourism sector, but for all tourism sector's organizations and bodies.

Literature review. Studies show that tourism, like any other business, has become globalized: customers compare, share reviews [2]. It is required creating unique products, and constantly improving them. The share of tourism in GDP and its multiplier effect - the impact on more than 30 sectors of the economy, the creation of 5-9 jobs in other sectors of the economy per one job created in tourism [3]. In the world, this effect is achieved through a systematic and integrated approach. By creating conditions for the development of sustainable tourism, which is closely related to the sustainable development of the territory.

Tourists who work during the whole year choose destinations for their vacation for the purpose of recreation and do not prioritize active vacation [4]. If for some tourists only the purpose of recreation is important, other tourists choose destinations, paying attention to the number of vacationers. For them, places with a high density of vacationers do not seem attractive [5]. Furthermore, there are a category of tourists who, firstly, when choosing the next distance for their vacation, go to social networks to find locations and beautiful spots to make some photos on vacation [6]. It is not possible to not giving much attention to the fact that country with such a natural potential, vast territories and population should also occupy a leading position on a world tourism market [7].

One of the most important and obvious barriers to the development of tourism in Kazakhstan are high cost for travel tickets and provided services. Moreover, in addition to the cost itself, travelers pay attention to the price and quality ratio, which quite strongly influences the choice of a vacation spot in Kazakhstan. This factor, in turn, is also affected by the low level of service in all sectors of the industry. This is because of the lack of competent staff and low culture of serving guests in general. That should be cognizant that the insufficient level of development of tourism infrastructure occurs in parallel with a decrease in the growth rate of tourist interest in the audience. Another barrier hindering the development of domestic tourism in Kazakhstan is the low awareness of consumers of tourism services. Unfortunately, it is worth noting that Kazakhstan is not being actively promoted as an attractive destination for tourists. According to Baloglu, the image of the country takes part in the development of tourism, improving the recognition of the country in the world and is one of the most effective tools for creating a country's competitive advantages [8]. Each tourist has his own cultural background of perception, his own ways of obtaining tourist information, personal tourist impressions, preferences, and expectations from travel. According to our domestic author Taranova, the country's tourist image is a set of cumulatively expressed emotional and rational ideas about the peculiarities and specifics of the country, formed in the minds of the public - real and potential tourists [9].

In conformity of results of the first nine months of 2021, outbound tourism indicators almost equaled the pre-pandemic level. According to the statistics of the Turistik Kamkor corporate fund, 323,470 Kazakhstanis traveled during the specified period [10]. In 2021, Kazakhstan recorded a record number of domestic tourists – 6,9 million people. This is five percent more than the pre-pandemic level and 35 percent more than last year [11]. Regarding outbound tourism, numbers show that the tourism area in Kazakhstan has not been able to fully take advantage of the present-day situation and, in a period of closed borders and limited opportunities for travel, to develop domestic tourism. This is even though the average cost of a bed in places of accommodation for the year increased from 8099 to 8494 tenge (from \$19 to \$20). The highest cost was recorded in the Mangistau region (12 thousand tenge - \$ 28), as well as in Almaty (11.8 thousand tenge - \$ 27) and Nur-Sultan (11.5 thousand tenge) [12].

For example, now the focus is on Turkestan, which recently received the status of the spiritual capital of the Turkic world. Since 2018, from the moment Turkestan became a regional center, almost \$1.5 billion has been invested in the city [13]. This money was accustomed to construct the tourist complex "Caravanserai" (the territory of the complex is 188 hectares), including an ice palace, an equestrian sports center and even a rowing canal along which gondolas with gondoliers' float [14]. It cannot be said that the local government authorities are doing nothing to change the situation, but still the question arises why Kazakhstan is not so popular for its tourism and what needs to be done to change it. The author of this study revealed in detail the factors and barriers that hinder the development of tourism sector in Kazakhstan.

Main part. Qualitative research helps to deep preferences and motives, to understand what please or upset your respondent, what he dreams about, what he fears, what he appreciates, and what he does not pay attention to [15].

The respondents of this study are 4 university professors in Almaty and 1 former owner of a travel agency (1 man and 4 women). All respondents have degrees in tourism field and decided to tie their lives with tourism and hospitality more than 15 years ago. Online interviews were conducted online using Zoom and Google meet platforms, whereas offline interviews were conducted in pre-arranged meeting point. When recording the interview, the authors warned about the audio recording and informed that the data obtained will be used only for academic purposes. Before the interview concerning the research, there was a small dialogue between the interviewer and respondent to dispel the tense atmosphere and make it more favorable and comfortable. Interviews were held during appropriate time for respondents (most of them preferred morning time), but due to a busy schedule some of them could held the interview during evening time.

Questions used to escort the interview:

1. What innovations exist in the tourism sector of Kazakhstan?
2. How promising and in demand among tourists is Kazakhstan? Your opinion
3. Does the government program for the development of tourism in Kazakhstan needs any adjustment in terms of the development of domestic tourism?
4. Have you heard about the TOP-10 tourist destinations for the development of tourism in Kazakhstan?
5. What innovative technologies to promote the tourist product are used in Kazakhstan?
6. What are the main barriers of tourism development in Kazakhstan?
7. What are the prospects for the development of tourism in Kazakhstan?

Conducted interview with all respondents helped to collect the answers and code them using Atlas.ti Software into separate factors stopping the improvement of tourism in Kazakhstan. Following factors noted by the respondents: infrastructure, level of living standards, investments, visa regime, lack of qualified staff, mentality of citizens, and foreign experience (see figure 1).

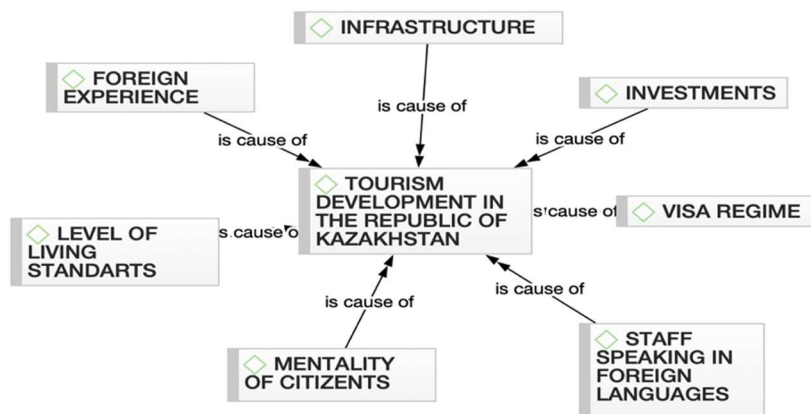


Figure 1. Atlas.ti framework of factors may stop tourism sector development in Kazakhstan*

* Compiled by the authors

Respondent #1 assures that the availability of infrastructure allows Kazakhstan to attract investors for the construction of high-quality tourist facilities. To the next question Is investment the only one factor with the change and improvement of which tourism in Kazakhstan will rise to the proper level, the respondent answered that in his opinion the Kazakhstani government do not spare money for the development of tourism. But money alone is not enough. We still need active participation from local businesses and travel companies. According to respondent #2 who gave an example of neighboring countries Uzbekistan and Russia, and she really cares about the fact they have gone far ahead in the development of infrastructure, new tourism programs, new measures. Already now they are making demands on businesses so that the territories of resorts and places of attraction are designed in a single style and standards. We are lagging in these matters.

Fastidious and travel-savvy foreigners can be charmed either by a complete immersion in the authentic life of the local population, preserved at least at the level of the Middle Ages, or by the highest level of

tourist service, or, at worst, by technology, somewhere at the level of fantasy. Kazakhstani people can not understand why tourists do not come to Kazakhstan and attribute everything to the actions of tourism officials devoid of logic and intelligence. One of the reasons is that Kazakhstani people did not preserve the way of life that they had in the 19th and early 20th centuries. There are only historical buildings scattered hundreds of kilometers apart – responded #2 added. In his opinion, the country clearly lacks national flavor. In-depth responses from respondents were presented in Figure 2.

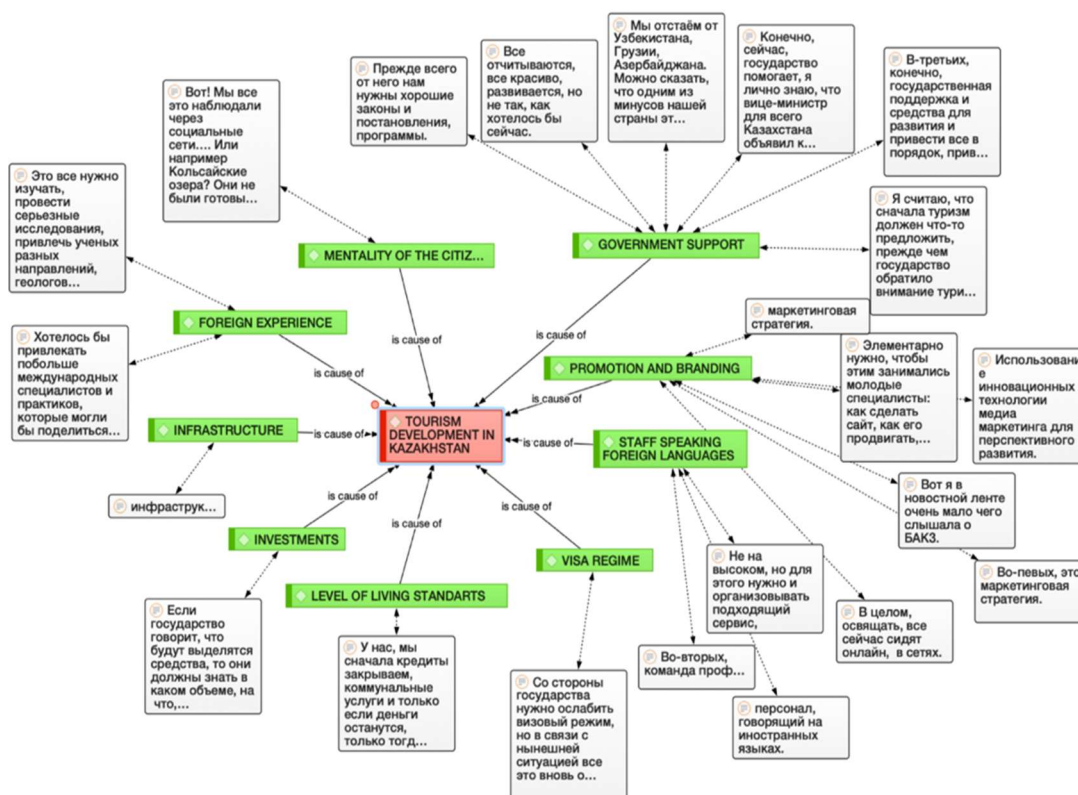


Figure 2. Atlas.ti framework of barriers may affect tourism development with detailed answers of the respondents*

* Compiled by the authors

Unfortunately, very often in our information materials, we advertise tourist sites - unique natural resources, cultural heritage sites, but they are silent about the existing tourist infrastructure. We think that we are attracting such an advertiser who, believe, will resist their achievements with not very high-quality service, and not only because of weak infrastructure. Then, with the help of expensive advertising, we risk forever losing hope of entering the world tourism market. Respondents answer that the state of the transport infrastructure has a huge impact on the development of tourism. Transport is a link between individual elements of the tourism industry and contributes to its development. Our railway transport has the following disadvantages: most of the cars have been in operation for over 20 years, and level of training of service personnel in trains is far from European standards; condition of the wagons does not make it possible to feel comfortable while traveling on such trains, which significantly reduces the number of tourists using the railway transport. All this negatively affects its attractiveness and competitiveness, according to respondents' answers.

Respondents note that the government focus their regulations for the development and promotion of tourism in the country change, but the focus is on large cities and rest of the regions remain in the shadows. From the government side competitions are used to attract tourists from abroad. One of the respondents notes that despite our economic condition, our place in the world market, we lag other neighboring countries such as Uzbekistan, Georgia, and Azerbaijan. Respondent #3 also noted a low level of preparedness of employees in the service sector. The level of provided service and employees are generally at a high level only in large and developed cities, but in small towns this issue is still exist.

In Kazakhstan we observe a situation with inflated prices for tourism products. For example, many hotels in the Borovoe resort operate seasonally, and the owner of one hotel needs to earn a certain amount

to support the entire main staff for 9 months. If we improve the year-round reception of tourists, then prices will begin to decline. But this question is also in doubt. We can not force business owners to work at a loss respondent #3 added.

Respondent #4 is discomposed with Kazakhstani mentality regarding development tourism which is not yet ready to welcome foreign tourists. Besides that, respondent #4 claims one of the reasons for the underdevelopment of the tourism industry in Kazakhstan is that at government level it was not dealt with purposefully as a branch of the economy. No attention was paid to integrated forecasting, long-term planning, territorial organization of tourism and non-state tourism structures. Respondent #5 shared his knowledge from communicating with foreign citizens and attributed the visa issue to the main barriers of tourism development. Today, getting a visa to Kazakhstan is quite expensive - about \$200. Making a visa is also problematic since it is necessary to collect a sufficiently large number of documents. Many tourists complain about the fact that it is easier to get a Schengen visa than Kazakhstani visa. This is the main deterrent.

Conclusions. Thus, there is no integrated approach in this industry. For example, tourist areas were divided into two groups: key projects of the international level and projects of the regional level. The first included well-known zones: the Burabay-Shehuchinsk resort area, the area of ski resorts near Almaty, the Kenderli seaside recreation area. In the second - Alakol, Balkhash, Bayanaul, Turkestan, Ulytau and many others. from the local budget. As a result, there is a regional stratification, when widespread development is needed so that not only local, but also foreign tourists can relax in the regions, and not only in elite zones.

First, a model of tourism development in any country, in any region is built based on public-private partnership. State support for tourism is a prerequisite for the sustainable development of the industry. International experience shows that active policies for the development of tourism infrastructure, attracting private investors, developing a regulatory framework, and providing favorable economic conditions for work will allow the tourism industry to play an important role in the socio-economic development of the country. In addition, international experience shows that a country that actively develops tourism allocates significant budgetary funds to the implementation of national projects and programs and provides its citizens and visitors with high-quality tourism services. That is, the state must find either financial resources or provide communal property to the management of tourist operators for the country to have its own tourist center. When the state goes hand in hand with business, this is a different matter. The entrepreneur thoroughly understands those issues that constitute the industry of his personal interests. He knows what tourism is, he knows how to attract foreigners to the country and what to do to improve its image.

Secondly, current global trend is the pursuit of authentic experiences. Tourists crave complete immersion in the original culture of different people, they want to see the country from the inside and communicate with the local population.

Kazakhstan has such an ideal tourist product - rich traditions, vibrant culture, delicious cuisine. In addition, Kazakhstan has beautiful landscapes. Kazakhstan needs to actively promote its country in foreign markets so that as many tourists around the world as possible learn about it.

Third, implementation in Kazakhstan and in the cities of tools that will make it as easy as possible for tourists to stay in a foreign country. Development of a universal pass ticket for attractions that can operate throughout a certain territory. It will be convenient if tourists can buy this pass at the hotel or at any of the attractions.

Fourth, a lack of specialists leads to the fact that the market for services is not growing. The reconfiguration of the education system, the exchange of employee between government agencies and business will help level these problems. Support for small and medium-sized businesses in the tourism sector will allow players to get out of the "shadow" and make the market more understandable.

Fifth, attracting tourists will be difficult until the transport network is established; hotel complexes, hotels and hostels will not meet international standards, and the sights themselves will not be sufficiently equipped. These problems can be solved through targeted state support of strategic investors in the industry and an increase in investments in tourism infrastructure by raising funds based on concession agreements, public-private and municipal-private partnerships, life cycle contracts and special investment contracts, as well as support from the Development Fund. These mechanisms should work not only in the construction of new roads and housing for tourists, but also in the field of protection and restoration of natural, historical, and cultural sites, their careful introduction into the tourism industry.

Thus, this study has shown existence of several factors that stop tourism development in Kazakhstan. It is recognized that the tourism sector needs to be developed in a manageable, controlled, sustainable manner. Only under this condition it will be able to bring economic benefits for Kazakhstan without causing serious environmental or social problems.

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ҚАЗАҚСТАНДА ІШКІ ТУРИЗМНІҢ ДАМУЫ: КЕДЕРГІЛЕРДІ АНЫҚТАУ

Андатпа

Қазақстанның туризмнің әртүрлі түрлерін дамыту үшін айтарлықтай әлеуеті бар: экологиялықтан бизнеске дейін. Бұған ел аумағында көптеген археологиялық және тарихи ескерткіштерді қалдырған бай тарих ықпал етеді. Бұл бірегей географиялық жағдаймен қамтамасыз етіледі, соның арқасында Қазақстанда табиғаттың қол тимеген бұрыштарын алуан түрлі ландшафттардан табуға болады. Бұған туризм инфрақұрылымын дамытудың, визалық режимді жеңілдету бойынша тұрақты жұмыстың және басқа да көптеген факторлардың арқасында қол жеткізілді. Қазақстан Республикасындағы туризм саласының әлеуетінің жоғары болуына және мәдениеттің, ресурстардың байлығына қарамастан, туризм өзінің дамуының ең жоғары деңгейіне жеткен жоқ.

Осылайша, бұл зерттеу қазіргі жағдайда Қазақстан Республикасындағы туризмді дамытудың жай-күйін талдауға, оның дамуына не кедергі болатынын анықтауға және мемлекеттік органдарға да, туризм секторына да емес, барлық туристік сектор ұйымдарына пайдалы болуы мүмкін ұсыныстарды беруге бағытталған. денелер. Бұл зерттеу сапалы зерттеу болып табылады. Деректер онлайн және офлайн форматта сұхбаттар арқылы жиналды. Деректерді жинағаннан кейін респонденттердің жауаптарын кодтау үшін Atlas.ti бағдарламалық құралы пайдаланылды. Бұл зерттеудің респонденттері – Алматыдан келген төрт университет профессоры және бір туристік фирманың бұрынғы иесі. Олардың барлығының туризм саласында жоғары білімі бар және 15 жылдан астам уақыт бұрын өмірлерін туризм және қонақжайлылық секторымен байланыстыруды шешті. Бұл зерттеу туристік органдармен жүргізілген сұхбат негізінде Қазақстандағы туризм секторының дамуын қандай кедергілер тоқтататынын көрсетті.

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РАЗВИТИЕ ВНУТРЕННЕГО ТУРИЗМА В КАЗАХСТАНЕ: ОПРЕДЕЛЕНИЕ БАРЬЕРОВ

Аннотация

Казахстан имеет значительный потенциал для развития различных видов туризма: от экологического до делового. Этому способствует богатая история, оставившая на территории страны множество археологических и исторических памятников. Это обеспечивается уникальным географическим положением, благодаря которому в Казахстане можно найти нетронутые уголки природы в самых разнообразных ландшафтах. Это также достигается благодаря развитию туристской инфраструктуры, постоянной работе по упрощению визового режима и многим другим факторам. Несмотря на высокий потенциал туристской сферы Республики Казахстан и богатство культуры, ресурсов, туризм не достиг наивысшего уровня своего развития.

Таким образом, данное исследование призвано проанализировать состояние развития туризма в Республике Казахстан в современных условиях, определить, что сдерживает его развитие, и дать рекомендации, которые могут быть полезны не только государству и туристской отрасли, но и всем организациям туристской отрасли и тела. Это исследование является качественным исследованием. Данные были собраны посредством интервью как в онлайн, так и в офлайн форматах. После сбора данных программное обеспечение Atlas.ti использовалось для кодирования ответов респондентов. Респондентами данного исследования являются четыре преподавателя университета из Алматы и один бывший владелец туристского агентства. Все они имеют высшее образование в сфере туризма и решили связать свою жизнь с туризмом и гостиничным бизнесом более 15 лет назад. Это исследование показало, какие барьеры останавливают развитие туристского сектора в Казахстане на основе интервью с туристскими органами.