

ISSN: 1991-3494 (Print)  
ISSN: 2518-1467 (Online)

**SCIENTIFIC JOURNAL OF  
PEDAGOGY AND ECONOMICS**

**№1  
2026**



ISSN 2518-1467 (Online),  
ISSN 1991-3494 (Print)



CENTRAL ASIAN ACADEMIC  
RESEARCH CENTER



# SCIENTIFIC JOURNAL OF PEDAGOGY AND ECONOMICS

PUBLISHED SINCE 1944

# 1 (419)

*January – February 2026*

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ALMATY, 2026

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**Scientific Journal of Pedagogy and Economics**

**ISSN 2518-1467 (Online),**

**ISSN 1991-3494 (Print).**

**Owner:** «Central Asian Academic Research Center» LLP (Almaty).

The certificate of registration of a periodical printed publication in the Committee of information of the Ministry of Information and Communications of the Republic of Kazakhstan

**№ KZ50VPY00121155**, issued on 05.06.2025

Thematic focus: «*publication of the results of new achievements in the field of fundamental sciences*»

**Periodicity:** 6 times a year.

<http://www.bulletin-science.kz/index.php/en/>

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Scientific Journal of Pedagogy and Economics

ISSN 2518-1467 (Online),

ISSN 1991-3494 (Print).

Меншіктенуші: «Орталық Азия академиялық ғылыми орталығы» ЖШС (Алматы қ.).

Қазақстан Республикасының Ақпарат және коммуникациялар министрлігінің Ақпарат комитетінде 05.06.2025 ж. берілген № KZ50VPY00121155 мерзімдік басылым тіркеуіне қойылу туралы куәлік.

Тақырыптық бағыты: *«іргелі ғылым салалары бойынша жаңа жетістіктердің нәтижелерін жариялау»*

Мерзімділігі: жылына 6 рет.

<http://www.bulletin-science.kz/index.php/en/>

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Scientific Journal of Pedagogy and Economics

ISSN 2518-1467 (Online),

ISSN 1991-3494 (Print).

Собственник: ТОО «Центрально-азиатский академический научный центр» (г. Алматы).

Свидетельство о постановке на учет периодического печатного издания в Комитете информации Министерства информации и коммуникаций и Республики Казахстан

№ KZ50VPY00121155 выданное 05.06.2025 г.

Тематическая направленность: «публикация результатов новых достижений области фундаментальных наук».

Периодичность: 6 раз в год.

<http://www.bulletin-science.kz/index.php/en/>

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SCIENTIFIC JOURNAL OF PEDAGOGY AND ECONOMICS

ISSN 1991-3494

Volume 1.

Number 419 (2026), 664-680

<https://doi.org/10.32014/2026.2518-1467.1129>

UDC: 330.322:339.727.5

IRSTI: 06.52.13

© **Kadyrbekova D.S.**<sup>1</sup>, **Klimova T.B.**<sup>2</sup>, **Duiskenova R.Zh.**<sup>3\*</sup>, 2026.<sup>1</sup> Kazakh Academy of Sport and Tourism, Almaty, Kazakhstan;<sup>2</sup> Belgorod State National Research University (NRU BelSU), Belgorod, Russian Federation;<sup>3</sup> Almaty Technological University, Almaty, Kazakhstan.

E-mail: raigul19@mail.ru

## INTERNATIONAL TOURISM IN KAZAKHSTAN: FACTORS ATTRACTING FOREIGN TOURISTS AND OPPORTUNITIES TO STRENGTHEN THE COUNTRY'S BRAND

**Kadyrbekova Dinara** — PhD, Lecturer, Department of Tourism and Service, Kazakh Academy of Sport and Tourism, Almaty, Kazakhstan,E-mail: 6537275@mail.ru, ORCID: <https://orcid.org/0000-0001-8641-253X>;**Klimova Tatyana** — Candidate of Economic Sciences, Associate Professor, Department of International Tourism and Hotel Business, Belgorod State National Research University (NRU BelSU), Belgorod, Russian Federation,E-mail: tklimova@bsuedu.ru, ORCID: <https://orcid.org/0000-0001-6329-8404>;**Duiskenova Raigul** — PhD, Acting Associate Professor, Almaty Technological University, Almaty, Kazakhstan,E-mail: raigul19@mail.ru, ORCID: <https://orcid.org/0000-0002-7011-8229>.

**Abstract.** The relevance of this study is driven by the strategic importance of international tourism for Kazakhstan's economic diversification, national image building, and destination competitiveness in the post-pandemic recovery period marked by intensified global competition for tourist flows. In 2024–2025, the quantitative growth of inbound arrivals is accompanied by structural constraints - high concentration in regional source markets, predominance of short stays, and the dominance of land-based entry channels - requiring a comprehensive assessment of attractiveness factors and branding effectiveness. The aim of the study is to analyze the determinants of attracting foreign visitors to Kazakhstan and to substantiate directions for strengthening the country's tourism brand, taking into account the structure of inbound flows, length of stay, and entry channels. The methodology combines descriptive trend and statistical-economic analysis of official data from the Bureau of National Statistics of the Republic of Kazakhstan with comparative analysis of international evidence from UNWTO, OECD, and the World Bank, complemented by an institutional and qualitative interpretation

grounded in the push–pull framework, destination competitiveness, and competitive identity approaches. The results indicate a highly concentrated inbound flow: the three largest markets (Uzbekistan, Kyrgyzstan, and Russia) account for 81.9% of visits; 60.2% of trips last up to two days; and 85.5% of entries occur through road checkpoints, constraining tourism yield. At the same time, despite a smaller share of air arrivals, Almaty and Astana airports have a disproportionate impact on “first impressions” and on prospects for long-haul and MICE segments. The practical significance of the study lies in proposing branding policy priorities: packaging short-cycle products (48–72 hours), developing stopover and event-based offerings, standardizing service quality at arrival nodes, expanding digital navigation solutions, and implementing KPIs focused on length of stay, in-destination expenditure, satisfaction, and repeat visitation.

**Keywords:** tional tourism; inbound tourism; destination attractiveness; nation branding; tourism yield; transport connectivity; stopover

*For citations:* Kadyrbekova D.S., Klimova T.B., Duiskenova R.Zh. *International tourism in Kazakhstan: factors attracting foreign tourists and opportunities to strengthen the country’s brand. Scientific Journal of Pedagogy and Economics, 2026. — No.1. — Pp. 664-680. DOI: <https://doi.org/10.32014/2026.2518-1467.1129>*

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<sup>1</sup> Қазақ спорт және туризм академиясы, Алматы, Қазақстан;

<sup>2</sup> «Белгород мемлекеттік ұлттық зерттеу университеті» (ҰЗУ БелГУ),  
Белгород, Ресей Федерациясы;

<sup>3</sup> Алматы технологиялық университеті, Алматы, Қазақстан.

E-mail: raigul19@mail.ru

## ҚАЗАҚСТАНДАҒЫ ХАЛЫҚАРАЛЫҚ ТУРИЗМ: ШЕТЕЛДІК ТУРИСТЕРДІ ТАРТУ ФАКТОРЛАРЫ ЖӘНЕ ЕЛ БРЕНДІН КҮШЕЙТУ МҮМКІНДІКТЕРІ

Қадырбекова Динара — PhD, оқытушы, Туризм және сервис кафедрасы, Қазақ спорт және туризм академиясы, Алматы, Қазақстан,

E-mail: 6537275@mail.ru, ORCID: 0000-0001-8641-253X;

Климова Татьяна — экономика ғылымдарының кандидаты, доцент, Халықаралық туризм және қонақүй бизнесі кафедрасы, «Белгород мемлекеттік ұлттық зерттеу университеті» ҰЗУ (NRU BelSU), Белгород, Ресей Федерациясы,

E-mail: tklimova@bsuedu.ru, ORCID: 0000-0001-6329-8404;

Дүйсенова Райгүл — PhD, қауымдастырылған профессор м.а., Алматы технологиялық университеті, Алматы, Қазақстан,

E-mail: raigul19@mail.ru, ORCID: 0000-0002-7011-8229.

**Аннотация.** Зерттеудің өзектілігі постпандемиялық кезеңде халықаралық туризмнің Қазақстан экономикасын әртараптандыру, ұлттық имиджді нығайту және дестинацияның бәсекеге қабілеттілігін арттыру тұрғысынан стратегиялық маңызымен, сондай-ақ туристік ағындар үшін жаһандық

бәсекенің күшеюімен айқындалады. 2024–2025 жж. кірме келушілер санының өсуі бірқатар құрылымдық шектеулермен қатар жүреді: келушілер ағынының өңірлік нарықтарға жоғары дәрежеде шоғырлануы, сапарлардың қысқа мерзімділігі және шекарадан өтудің негізінен жерүсті арналары арқылы жүзеге асуы, бұл тартымдылық факторлары мен брендтеудің тиімділігін кешенді бағалауды талап етеді. Зерттеудің мақсаты - Қазақстанға шетелдік туристерді тарту факторларын талдау және кірме ағынның құрылымы, болу ұзақтығы мен кіру арналары ескерілген жағдайда елдің туристік брендин күшейту бағыттарын негіздеу. Әдіснама Бюро ұлттық статистикасының ресми деректеріне дескриптивті-динамикалық және статистикалық-экономикалық талдауды, UNWTO, OECD және Дүниежүзілік банк материалдары бойынша салыстырмалы талдауды, сондай-ақ push–pull тұжырымдамасы, дестинация бәсекеге қабілеттілігі және бәсекелік сәйкестік тәсілдері негізіндегі институционалдық-сапалық интерпретацияны қамтиды. Нәтижелер кірме ағынның жоғары концентрациясын көрсетеді: үш ірі нарық (Өзбекстан, Қырғызстан, Ресей) сапарлардың 81,9%-ын құрайды; 60,2% сапар 2 күнге дейінгі мерзімге келеді; ал 85,5% кіру автомобильдік өткізу пункттері арқылы жүзеге асады, бұл туристік табыстылықты (yield) шектейді. Сонымен қатар әуе арқылы келудің үлесі төмен болғанымен, Алматы және Астана әуежайлары «алғашқы әсерді» қалыптастыруда және алыс нарықтар мен MICE сегментін дамытуда айрықша рөл атқарады. Практикалық маңыздылығы бренд-саясаттың басымдықтарын ұсынумен байланысты: 48–72 сағаттық қысқа өнімдерді пакеттеу, stopover және оқиғалық өнімдерді дамыту, келу тораптарында сервисті стандарттау, цифрлық навигацияны күшейту және болу ұзақтығы, жергілікті шығындар, қанағаттану мен қайта келу көрсеткіштеріне бағытталған KPI енгізу.

**Түйін сөздер:** халықаралық туризм; кірме туризм; дестинация тартымдылығы; ұлттық бренд; туристік табыстылық (yield); көлік байланыстылығы; stopover

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<sup>1</sup>Казахская академия спорта и туризма, Алматы, Казахстан;

<sup>2</sup> НИУ «Белгородский государственный национальный исследовательский университет» (НИУ БелГУ), Белгород, Российская Федерация;

<sup>3</sup> Алматинский технологический университет, Алматы, Казахстан.

E-mail: raigul19@mail.ru

## МЕЖДУНАРОДНЫЙ ТУРИЗМ В КАЗАХСТАНЕ: ФАКТОРЫ ПРИВЛЕЧЕНИЯ ИНОСТРАННЫХ ТУРИСТОВ И ВОЗМОЖНОСТИ УСИЛЕНИЯ БРЕНДА СТРАНЫ

**Кадырбекова Динара** — PhD, преподаватель кафедры туризма и сервиса, Казахская академия спорта и туризма, Алматы, Казахстан,  
E-mail: 6537275@mail.ru, ORCID: 0000-0001-8641-253X;



**Климова Татьяна** — кандидат экономических наук, доцент, кафедра международного туризма и гостиничного бизнеса, НИУ «Белгородский государственный национальный исследовательский университет» (НИУ БелГУ), Белгород, Российская Федерация, E-mail: tklimova@bsuedu.ru, ORCID: 0000-0001-6329-8404;

**Дүйсенова Райгүл** — PhD, и.о. ассоциированного профессора, Алматинский технологический университет, Алматы, Казахстан, E-mail: raigul19@mail.ru, ORCID: 0000-0002-7011-8229.

**Аннотация.** Актуальность исследования обусловлена стратегической значимостью развития международного туризма как инструмента диверсификации экономики Казахстана, усиления национального имиджа и повышения конкурентоспособности дестинации в условиях постпандемийного восстановления и роста глобальной конкуренции за туристские потоки. В 2024–2025 гг. количественный рост въездов сопровождается структурными ограничениями: высокой концентрацией на региональных рынках, преобладанием краткосрочных визитов и доминированием наземных каналов въезда, что требует комплексной оценки факторов привлекательности и эффективности брендинга. Цель исследования заключается в анализе факторов привлечения иностранных туристов в Казахстан и обосновании направлений усиления бренда страны с учетом структуры въездного потока, длительности пребывания и каналов въезда. Методы включают дескриптивно-динамический и статистико-экономический анализ данных Бюро национальной статистики РК, сравнительный анализ международных материалов UNWTO, OECD и Всемирного банка, а также институционально-качественную интерпретацию на основе концепций push–pull, конкурентоспособности дестинации и конкурентной идентичности. Результаты показывают высокую концентрацию потока: три крупнейших рынка (Узбекистан, Кыргызстан, Россия) формируют 81,9% посещений; 60,2% визитов приходится на пребывание до 2 дней; 85,5% въездов осуществляется через автомобильные пункты пропуска, что ограничивает туристскую доходность (yield). Установлено, что при меньшей доле авиа-въезда аэропорты Алматы и Астаны имеют непропорционально высокое значение для «первого впечатления» и развития дальнемагистральных и МІСЕ-сегментов. Практическая значимость заключается в предложении приоритетов бренд-политики: продуктовая упаковка коротких поездок (48–72 часа), развитие stopover и событийных продуктов, стандартизация сервиса в узлах прибытия, цифровая навигация и KPI, ориентированные на длительность пребывания, расходы на месте, удовлетворённость и повторные визиты.

**Ключевые слова:** международный туризм; въездной туризм; привлекательность дестинации; национальный бренд; туристская доходность (yield); транспортная связанность; stopover (остановка с посещением страны)

**Introduction.** Over recent decades, International tourism has evolved into one of the key drivers of economic growth, regional development, and the formation

of national image. According to the World Tourism Organization (UNWTO), tourism's contribution to global GDP in the pre-crisis period exceeded 10%, and international tourist flows were viewed not only as a source of income but also as an instrument of "soft power" and cultural diplomacy (UNWTO, 2022). In the context of post-pandemic recovery and geo-economic shifts, competition for international tourist flows has intensified, increasing the relevance of nation branding and the differentiation of tourism products.

For Kazakhstan, the development of international tourism has become strategically important in the context of economic diversification, reducing dependence on the raw-material sector, and enhancing the country's visibility in the global market. Despite its substantial natural-landscape, cultural-historical, and transit potential, Kazakhstan still has a relatively low share of inbound tourism in GDP compared with countries similar in size and resource endowment (World Bank, 2023).

Notwithstanding ongoing state programs and initiatives aimed at developing the tourism industry, inbound tourist flows remain volatile and largely sensitive to external factors, including pandemic-related restrictions, geopolitical tensions, and transport accessibility. This situation underscores the need for a systematic analysis of the factors that shape Kazakhstan's attractiveness for foreign tourists, as well as an assessment of the potential to strengthen the national tourism brand.

Accordingly, this article aims to analyze the key determinants of attracting foreign tourists to Kazakhstan and to identify opportunities for strengthening the country's brand in the international tourism market. The study employs comparative analysis, synthesis of international experience, and analysis of statistical data from international organizations and national sources.

**Literature Review.** International tourism is among the most dynamic sectors of the global economy and exerts a substantial influence on the socio-economic development of countries. For Kazakhstan, which seeks to diversify its economy and reduce dependence on the resource-based sector, the development of inbound tourism is a strategic priority. This literature review systematizes key scholarly contributions addressing the attraction of foreign tourists and the formation of a country's tourism brand.

A foundational theoretical framework for analyzing tourist motivation is the push-pull concept proposed by Crompton (1979). Within this approach, push factors reflect tourists' internal needs - such as rest, the pursuit of new experiences, and escape from everyday routines - whereas pull factors are determined by destination attributes, including natural resources, cultural heritage, infrastructure, and safety. Crompton demonstrated that push factors are primary in the decision to travel, while pull factors shape the choice of a particular destination (Crompton, 1979: 410-420). This framework remains relevant for examining the determinants of tourist attraction to Kazakhstan.

A major theoretical contribution to destination marketing is Anholt's (2007) concept of "Competitive Identity." Anholt substantiated the notion of a state's

competitive identity and introduced the hexagonal model of national branding, encompassing six channels: tourism, exports, governance, investment, culture, and people. From Anholt's perspective, tourism is one of the most effective instruments for shaping and promoting a national brand because travel experiences generate direct impressions of a country (Anholt, 2007: 25–38).

Kazakhstan possesses a considerable and diverse tourism potential. In the edited volume *Tourism in Central Asia: Cultural Potential and Challenges*, Kantarci, Uysal, and Magnini (2015) provided a comprehensive assessment of the region's tourism resources. The authors emphasize that Kazakhstan combines unique natural landscapes (the Tien Shan and Altai Mountain systems, steppes, deserts, and large lakes) with rich cultural and historical heritage associated with the Great Silk Road and nomadic culture. However, they note that this potential remains underutilized due to infrastructural constraints and weak marketing activity in international markets (Kantarci et al., 2015: 87–105).

UNESCO World Heritage sites are of particular importance for inbound tourism development. According to the UNESCO World Heritage Centre (2023), Kazakhstan hosts five World Heritage properties: the Mausoleum of Khoja Ahmed Yasawi, the Petroglyphs within the Archaeological Landscape of Tamgaly, the Silk Roads: the Routes Network of Chang'an–Tianshan Corridor, Saryarka - Steppe and Lakes of Northern Kazakhstan, and Western Tien-Shan. These sites represent strong assets for cultural and nature-based tourism and can serve as a foundation for developing a distinctive national tourism offer.

Tiberghien (2019) examined the development of ecotourism and cultural tourism in Kazakhstan, drawing on the cases of the Altyn-Emel National Park, Kolsai Lakes National Park, and Charyn Canyon. The study highlights the strong potential of these areas to attract international tourists seeking authentic and environmentally responsible experiences, while also identifying major constraints, including limited transport accessibility, language barriers, a shortage of qualified guides, and inadequate accommodation capacity in tourism areas (Tiberghien, 2019: 494–508).

Agrotourism is viewed as a promising direction for diversifying the tourism product. Rakhimberdinova et al. (2022) analyzed the development of Kazakhstan's agro-industrial complex with a view to establishing agrotourism zones. The authors argue that integrating agrotourism can contribute to rural revitalization and support the rural economy. Their findings indicate a close link between agricultural eco-efficiency and agrotourism development, which is relevant for high-quality agro-ecological growth. They recommend targeted state support for farms providing tourism services and the development of rural tourism infrastructure (Rakhimberdinova et al., 2022, pp. 2311–2319).

Despite its substantial potential, inbound tourism in Kazakhstan faces notable constraints. Aliyeva et al. (2019) conducted a comprehensive analysis of the country's tourism infrastructure and identified pronounced disparities between major cities (Almaty and Astana) and tourism regions. The authors highlight shortcomings in roadside infrastructure, limited international air routes to regional

destinations, and relatively high prices for tourism services combined with uneven service quality (Aliyeva et al., 2019: 178–192).

According to UNWTO (2020), prior to the COVID-19 pandemic international tourism exhibited sustained growth, reaching 1.465 billion international arrivals in 2019. Nevertheless, Kazakhstan's share in the global tourism flow remains modest, indicating unrealized potential and the need to strengthen marketing efforts.

Aimagambetov et al. (2017) proposed a model for the sustainable development of Kazakhstan's tourism industry. The authors argue for positioning Kazakhstan as a destination for authentic tourism, emphasizing vast *crenpe* landscapes, nomadic culture, and opportunities for secluded travel away from mass tourism. They link this positioning to global trends toward authenticity and escapism, suggesting potential competitive advantages for Kazakhstan (Aimagambetov et al., 2017: 184–193).

Comparative evidence with competing destinations highlights opportunities for growth. Thuen (2019) analyzed Georgia's successful tourism brand transformation, noting an increase in inbound arrivals from 1.5 million in 2010 to 9.4 million in 2019. The key drivers included consistent government policy, visa liberalization, large-scale marketing campaigns, and the development of gastronomic tourism. Georgia's experience may be adapted to Kazakhstan, subject to national context and specific conditions (Thuen, 2019: 623–635).

Overall, the literature indicates that Kazakhstan has significant tourism potential grounded in distinctive natural landscapes, cultural heritage assets, and opportunities for specialized forms of tourism, including ecotourism and agrotourism. At the same time, realizing this potential is constrained by infrastructural limitations, low international awareness, and insufficient coordination of marketing efforts. Strengthening Kazakhstan's tourism brand therefore requires clear positioning based on the country's unique attributes, the advancement of digital marketing, and the careful adaptation of best practices from competing destinations.

**Materials and Methods.** The materials and methods of this study are based on a combination of statistical-economic, comparative, and institutional approaches, enabling a comprehensive assessment of the factors attracting foreign tourists to Kazakhstan and the identification of pathways for strengthening the national brand. The empirical basis comprises official statistics from the Bureau of National Statistics of the Republic of Kazakhstan on inbound tourism, accommodation supply, occupancy rates, and tourism expenditure, as well as information from relevant national authorities on visa liberalization measures, route network development, and the implementation of sector support programs (Bureau of National Statistics of the Republic of Kazakhstan, 2024; Ministry of Tourism and Sports of the Republic of Kazakhstan, 2023). To benchmark international dynamics and situate Kazakhstan within the global context, the study draws on UNWTO materials on the recovery of international tourism flows and post-pandemic structural trends, as well as OECD analytical reviews on tourism policy and competitiveness (UNWTO, 2022; OECD, 2022). In addition, World Bank data on infrastructure quality, logistics

connectivity, and the service economy, together with country reports characterizing the institutional environment and barriers to sectoral development, are used (World Bank, 2023).

The methodological design comprises three complementary components. The first component involves a descriptive and trend analysis of key indicators of Kazakhstan's international tourism, including time-series assessment of inbound flows, the composition of source markets, demand seasonality, and tourism infrastructure metrics. The second component applies a comparative analysis of international destination branding practices and instruments for attracting foreign tourists, including visa policy, improvements in air connectivity, digital marketing, and the development of tourism clusters; benchmarking is conducted against OECD practices and successful emerging destinations with broadly comparable initial conditions (OECD, 2022). The third component consists of an institutional and qualitative analysis of Kazakhstan's national tourism brand, examining the country's positioning elements, the nature of communications in external markets, and the alignment between the offered tourism product and the declared destination image; the conceptual basis is provided by the competitive identity framework and place-brand management (Anholt, 2007).

To enhance the reliability of the findings, the study applies a triangulation principle across sources and methods: national statistics are cross-checked against international databases and analytical reports, while conclusions regarding attractiveness factors and branding are derived at the intersection of quantitative trends, comparative interpretation, and institutional analysis (UNWTO, 2022; World Bank, 2023). The study's limitations relate to differences in methodologies for recording inbound tourism in national and international statistics and to the limited public availability of detailed data on the expenditure structure of foreign visitors across regions and market segments; these constraints are considered in interpreting the results and formulating recommendations.

**Results.** The results indicate that Kazakhstan's inbound tourism model in 2024–2025 is characterized by a strong regional concentration, the predominance of land-based entry channels, and short lengths of stay. This configuration shapes a specific pattern of tourism consumption and objectively limits the “depth” of visitors' engagement with the destination brand (Bureau of National Statistics of the Republic of Kazakhstan, 2024; UNWTO, 2022; World Bank, 2023). Under these conditions, an increase in the number of inbound visits is not necessarily accompanied by a proportional rise in tourism revenues or international visibility, since the composition of source markets, average length of stay, and entry channels - factors that determine spending trajectories, the bundle of services consumed, and the quality of “first impressions” - become decisive (OECD, 2022).

Evidence from the sample survey of inbound visitors points to a high concentration of arrivals, with a substantial share of trips generated by neighboring countries (Central Asia and the Russian Federation). This reflects the dominance of proximity-related drivers, cross-border mobility, transport connectivity, and short-

duration visits (Bureau of National Statistics of the Republic of Kazakhstan, 2024). While such a structure ensures relative stability of arrivals due to low mobility barriers and frequent repeat visits, it also constrains value-added potential: short trips and transit/border-crossing patterns of consumption are typically associated with lower spending on accommodation, cultural and excursion services, and weaker involvement in the destination's brand communications (UNWTO, 2022; OECD, 2022).

Table 1 – Inbound visitors to Kazakhstan by citizenship: Top 10 (2024)

Country of citizenship	Visitors, persons	Share, %
Uzbekistan	5,873,306	38.5
Kyrgyzstan	3,366,938	22.1
Russia	3,255,136	21.3
Tajikistan	964,383	6.3
China	655,083	4.3
Belarus	156,761	1.0
India	146,241	1.0
Turkey	129,595	0.8
Azerbaijan	102,202	0.7
Germany	92,063	0.6
Note: Compiled by the authors based on data from the Bureau of National Statistics of the Republic of Kazakhstan (2024).		

The citizenship breakdown (Table 1) reveals a very high concentration of inbound flows: the three largest source markets (Uzbekistan, Kyrgyzstan, and Russia) account for 81.9% of all inbound visits in 2024, while the top five markets (including Tajikistan and China) represent 92.5%. Overall, the top 10 countries generate 96.6% of the inbound flow, indicating that the current inbound tourism model is structurally dependent on stable regional mobility, cross-border interactions, and transport connectivity (Bureau of National Statistics of the Republic of Kazakhstan, 2024).

This pattern is typologically consistent with the predominance of short-haul travel, which is generally characterized by short travel distances, a high frequency of repeat visits, and relatively limited “product depth” of the tourism experience (including the prevalence of non-seasonal and non-leisure motivations). Consequently, growth in the absolute number of visits is likely to have a limited macro-level effect on tourism revenues and destination brand capitalization unless it is accompanied by higher in-destination spending, expanded consumption of accommodation and excursion services, event and cultural products, and an increase in average length of stay (UNWTO, 2022; OECD, 2022).

Table 2 – Length of stay of inbound visitors (2024)

Length-of-stay category	Visitors, persons	Share, %
Up to 1 day	4,880,800	32.0
1–2 days	4,302,246	28.2

3–4 days	3,193,770	20.9
5–7 days	1,607,220	10.5
8–15 days	1,178,913	7.7
16–30 days	95,997	0.6
31–90 days	3,069	0.0
More than 90 days	1,425	0.0
<b>Total</b>	<b>15,262,368</b>	<b>100.0</b>

Note: Compiled by the authors based on data from the Bureau of National Statistics of the Republic of Kazakhstan (2024).

The distribution by length of stay (Table 2) demonstrates the predominance of short visits: trips lasting up to two days account for 60.2%, while visits of up to four days represent 81.1% of all trips. This empirically confirms Kazakhstan’s inbound tourism model as a “short-cycle” pattern (short-break / transit-like), in which the tourist experience is frequently limited to transport hubs, movement corridors, and one or two urban locations. Under such conditions, perceptions of the country and its competitive image are shaped through a relatively narrow set of signals - ease of border crossing, navigation and service quality at arrival/departure points, and access to basic services - while the potential for brand capitalization through a diversified tourism product and cultural experiences remains underrealized.

If length of stay is additionally approximated using midpoints of the interval groups (a weighted average based on the categories in Table 2), the average trip duration is about 3.0 days (the estimate is sensitive to assumptions within the interval ranges). This further confirms the dominance of short visits and underscores that the key reserve for increasing sectoral returns lies not only in expanding the number of inbound arrivals but also in deepening the travel experience: adding overnight stays, expanding intra-country itineraries, and increasing consumption of additional services and event-based products (OECD, 2022). At the same time, the share of longer stays (8+ days) remains relatively small (approximately 8.4%), limiting demand for more complex multi-day routes and constraining the development of higher-yield segments without targeted product “fine-tuning” and market positioning for long-haul demand (UNWTO, 2022; OECD, 2022).

Table 3 – Structure of inbound entries by type of border crossing point (2024)

Type	Visitors, persons	Share, %
Road	13 042 183	85,5
Air	1 599 346	10,5
Rail	620 839	4,1
<b>Total</b>	<b>15 262 368</b>	<b>100,0</b>

Note: Authors’ grouping based on data from the Bureau of National Statistics of the Republic of Kazakhstan (2024).

The structure of entries by type of border crossing point (Table 3) shows that road checkpoints account for 85.5% of all inbound visits, whereas air arrivals represent 10.5% and rail entries 4.1% (Bureau of National Statistics of the Republic of

Kazakhstan, 2024). This pattern indicates a systematic reliance of inbound flows on land-based mobility and, consequently, on short-haul source markets. From a brand-management perspective, this is critical: land-based trips are typically characterized by shorter planning horizons, a higher share of repeat and private visits, and, as a rule, weaker engagement with the full destination product. Accordingly, marketing communications for this segment should be tightly aligned with service quality at border crossing points and with “fast” products that are purchased on the spot in a “here-and-now” mode (UNWTO, 2022).

At the same time, despite their smaller share, air hubs remain strategically important as gateways to long-haul markets and as key “first-impression” generators for segments with higher potential spending and longer itineraries. Therefore, the influence of air entry on destination branding is disproportionately large: airport service quality, the airport-to-city connection, wayfinding, language accessibility, and seamless transit directly shape visitor satisfaction, destination evaluation, and the likelihood of repeat visitation (UNWTO, 2022).

Table 4 – Top 10 border crossing points by inbound visitors (2024)

<b>Border crossing point</b>	<b>Visitors, persons</b>	<b>Share, %</b>
Kordai (road)	3 061 078	20,1
Nur Zholy (road)	2 123 219	13,9
Karasu (road)	1 509 729	9,9
Konysbaeva (road)	1 033 839	6,8
Aul (road)	829 966	5,4
International airport Almaty (air)	1 582 228	10,4
International airport Astana (air)	1 037 911	6,8
Zhaisan (road)	692 836	4,5
Atameken (road)	544 278	3,6
Tazhen (road)	440 799	2,9

*Note: Compiled by the authors based on data from the Bureau of National Statistics of the Republic of Kazakhstan (2024).*

The top 10 border crossing points (Table 4) account for 84.3% of the total inbound flow, indicating pronounced hub-based concentration. The dominance of several land checkpoints (Kordai, Nur Zholy, Karasu, and Konysbaeva) implies that service quality, throughput capacity, time costs of border crossing, and the availability of reliable information at these specific “touchpoints” can substantially affect both the conversion of flows into in-destination spending and reputational outcomes. Practically, this sets the priority for targeted interventions - from service design and wayfinding to the development of supporting infrastructure (parking, public transport links, currency exchange, mobile connectivity, and tourist information) - since improvements in a limited number of nodes can yield a disproportionately strong effect on perceptions of the country as a tourism destination (UNWTO, 2022).

In addition, data on collective accommodation establishments for January–

September 2025 indicate a substantial scale of tourism mobility, thereby reinforcing the practical relevance of measures aimed not only at increasing visits but also at improving service quality and converting flows into in-destination expenditure. Under a consumption pattern dominated by short stays, the service and product environment at key arrival nodes and in major urban/regional centers becomes a decisive factor for monetizing stays and shaping a stable destination brand image.

Given the identified inbound flow structure and the predominance of short visits, four priority directions for positioning and brand policy are proposed.

Strengthening regional demand through short-cycle products (2–4 days). Priority should be given to packaging offers for nearby markets and repeat visitors, including weekend event programs, family formats, and gastronomic and cultural routes linked to major cities and border hubs where the bulk of entries is generated (Bureau of National Statistics of the Republic of Kazakhstan, 2024).

Converting short trips into higher in-destination spending. To enhance monetization, scalable solutions that can be purchased within a 24–72-hour planning horizon are advisable, such as city-pass systems, unified tourism navigation, “ready-to-buy” excursion packages, and prioritized improvements in service quality at “first-contact” points (airports, major border crossings, and transport hubs) (Bureau of National Statistics of the Republic of Kazakhstan, 2024).

Expanding long-haul segments through niche competitiveness and reduced access frictions. For distant markets, competitiveness is created less by the scale of promotion and more by the uniqueness of experiences and clear product specialization: “nature + culture” bundles, heritage routes, MICE formats, and event-based products. In parallel, targeted “fine-tuning” of access conditions is required to reduce transaction costs of travel and increase itinerary predictability (Bureau of National Statistics of the Republic of Kazakhstan, 2024).

Institutionalizing the brand through KPIs and service standards. Branding effectiveness should be anchored in measurable indicators - average length of stay, share of air arrivals, expenditure per trip, repeat visitation, and loyalty/satisfaction metrics (including NPS). At the same time, service standardization at airports and border crossings and the alignment of communications with the actual destination product are needed so that brand promises are consistently confirmed by the visitor experience (Bureau of National Statistics of the Republic of Kazakhstan, 2024).

Overall, against the backdrop of global tourism recovery, competition is intensifying not only for the number of arrivals but also for the quality of the tourism experience and the monetization of stays. For Kazakhstan in 2024–2025, the effectiveness of national branding is determined by its ability to systematically transform the prevailing short-stay, land-based flows into deeper consumption through product, service, and infrastructure coherence, institutionalized via measurable KPIs (length of stay, expenditure per trip, share of air arrivals, repeat visitation, and NPS).

**Discussion.** The findings confirm that Kazakhstan’s current international tourism model in 2024–2025 relies heavily on regional mobility and land-based

connectivity. This generates a stable demand structure in which a high share of visitors from neighboring countries and the predominance of short trips (including stays of 1–2 days) produce a “short-cycle” pattern of tourism consumption (Bureau of National Statistics of the Republic of Kazakhstan, 2024). Within the push–pull framework, this configuration implies that Kazakhstan benefits primarily from pull factors related to accessibility and proximity (geography, transport connectivity, and cross-border links), whereas pull factors associated with destination uniqueness and brand strength (cultural experiences, natural landscapes, events, and service quality) still insufficiently convert flows into longer stays and higher spending (Crompton, 1979; UNWTO, 2022).

The results also suggest that the “short-cycle” pattern reflects the mixed nature of inbound mobility, where tourism trips coexist with transit, visiting friends and relatives (VFR), and business travel. In push–pull terms, even when basic accessibility-related pull factors are present, the motivational profiles of a portion of entrants do not imply expanded consumption of tourism services (accommodation, excursions, cultural activities), which is empirically manifested in the high share of short stays (Bureau of National Statistics of the Republic of Kazakhstan, 2024; Crompton, 1979; UNWTO, 2022). Consequently, the policy focus should shift from an abstract increase in “flows” to a managed conversion of mobility into tourism consumption - turning entry into stays and expenditure.

The concentration of inbound flows in Central Asian markets and the Russian Federation represents, on the one hand, a structural advantage (low travel barriers and a high frequency of repeat visits), but, on the other hand, it creates dependence risks: regional flows are sensitive to exchange-rate volatility, changes in border-crossing regulations, seasonal constraints, and shifts in migration and business activity (World Bank, 2023). As a result, the sector may exhibit growth in arrivals without an equivalent increase in value added if a substantial share of visits is attributable to transit, short trips, or VFR travel. This logic is consistent with international evidence showing that growth in arrivals alone does not guarantee an increased contribution of tourism to GDP without policies aimed at raising tourism yield (UNWTO, 2022; OECD, 2022).

From this perspective, model performance should be assessed through the lens of tourism yield: under the dominance of short stays, the main constraint on value added is not the volume of arrivals but the composition of expenditure and the degree to which visitors are integrated into paid elements of the tourism value chain (accommodation, out-of-home dining, entertainment, domestic transport, and shopping). International practice emphasizes that a sustained economic contribution from tourism is achieved when policies prioritize higher expenditure per trip and longer stays rather than focusing solely on increasing arrivals (UNWTO, 2022; OECD, 2022). Accordingly, the vulnerability of regional flows to currency and regulatory shocks (World Bank, 2023) reinforces the need for instruments that increase the value of each visit - product packaging, improved service quality at arrival nodes, and event-based incentives to extend stays.

The predominance of stays of up to two days indicates that a substantial share of visits does not reach the stage of “immersion” in the destination product. From the standpoint of destination competitiveness, this points to an underdeveloped chain of “accessibility → product → service → experience → repeat visitation,” where a weak link reduces average spending and the likelihood of recommendations. This is particularly critical for nation branding: perceptions of Kazakhstan are formed through short contacts (border crossings/airports, transport, and basic services), whereas the brand as a “competitive identity” requires repeatable positive experiences supported by infrastructure, service quality, and coherent communications (Anholt, 2007). Thus, within the current model, the national brand is manifested primarily as the brand of the actual experience at touchpoints rather than as an abstract image conveyed through advertising.

Linking the empirical results to destination competitiveness frameworks further clarifies the bottleneck: the challenge lies not so much in the availability of resources (nature and culture) as in the manageability of visitor experience within a short time horizon. For trips lasting 1–2 days, the weight of each element in the “accessibility → product → service → experience” chain increases substantially: wayfinding frictions, information deficits, difficulties in purchasing services, and inconsistencies between communications and the real product more rapidly reduce satisfaction and weaken word-of-mouth effects, whereas targeted improvements can generate a disproportionately strong increase in conversion and repeat visitation (Anholt, 2007).

The predominance of road crossings further underscores the importance of land infrastructure and service provision at border hubs as determinants of the “first-contact” impression. At the same time, the air hubs of Almaty and Astana serve as “brand showcases” for long-haul markets and the MICE segment: airport service quality, airport-to-city connectivity, digital accessibility, transfer convenience, and clarity of tourism offerings directly affect the conversion of transit into visitation (stopover) and, more broadly, perceptions of the country as modern and hospitable (UNWTO, 2022; OECD, 2022; World Bank, 2023). International experience indicates that institutional “assembly” of the hospitality chain at arrival nodes often delivers rapid effects at relatively moderate cost (UNWTO, 2022).

The identified patterns also support the argument that expanding presence in long-haul markets is more efficient through niche positioning rather than broad, undifferentiated promotion. In a competitive environment, Kazakhstan can strengthen its appeal through “nature + culture” bundles, heritage routes (including UNESCO sites), ecotourism and active recreation, and MICE in major cities, accompanied by enhanced service quality (UNESCO World Heritage Centre, 2023; Tiberghien, 2019). This approach aligns with nation-branding logic: a successful competitive identity is built around a limited set of clear associations and is sustained by product quality rather than communications alone (Anholt, 2007).

Overall, the results indicate that strengthening Kazakhstan’s brand as a tourism destination requires a shift from predominantly communication-driven measures

to comprehensive demand and experience management, including: (1) service and infrastructure standards at arrival nodes and along priority routes; (2) packaging short trips (48–72 hours) for regional markets; (3) developing an event economy and calendar as a tool for extending stays; (4) improving digital accessibility (information, booking, multilingual services); and (5) introducing KPIs focused not only on arrivals but also on length of stay, expenditure per trip, repeat visitation, and satisfaction (Bureau of National Statistics of the Republic of Kazakhstan, 2024; UNWTO, 2022; OECD, 2022).

Finally, a methodological limitation should be acknowledged: official inbound visitor statistics aggregate different types of mobility (tourism, transit, private, and business travel), which complicates the identification of “pure” tourism demand and the profiling of expenditures by segment (Bureau of National Statistics of the Republic of Kazakhstan, 2024). Therefore, further research should prioritize: (i) segmentation by travel purpose and expenditure level; (ii) regional analysis of the conversion of flows into accommodation and service consumption; and (iii) quasi-experimental evaluation of the effectiveness of specific branding instruments (visa measures, transport connectivity, digital campaigns) (OECD, 2022).

**Conclusion.** The analysis demonstrates that international tourism in Kazakhstan in 2024–2025 is characterized by a high concentration of inbound flows in regional source markets and a predominance of short trips, which limits the “depth of consumption” and, consequently, the economic returns from tourism (Bureau of National Statistics of the Republic of Kazakhstan, 2024; UNWTO, 2024). The dominance of land-based entry channels, alongside a comparatively smaller share of air arrivals, underscores the central role of transport connectivity and cross-border mobility in shaping inbound flows. At the same time, the air hubs of Almaty and Astana function as critically important “first-contact” points that set the quality of the initial tourist experience and influence perceptions of service standards and the country’s overall image (Bureau of National Statistics of the Republic of Kazakhstan, 2024; OECD, 2022).

Substantively, the findings indicate that Kazakhstan’s main strategic reserve for strengthening its tourism brand is associated less with intensifying communications and more with product and institutional “assembly” of the destination: packaging short-cycle itineraries (48–72 hours), developing stopover programs, building an event agenda, standardizing hospitality at arrival nodes, and expanding digital services (navigation, booking, multilingual information support). For long-haul markets, a selective promotion strategy through distinctive niches - ecotourism, cultural and heritage routes, and MICE - appears promising, as it leverages Kazakhstan’s heritage assets and natural-landscape uniqueness and aligns with the logic of building a country’s competitive identity (Anholt, 2007; UNESCO, 2023).

Overall, the results confirm that shifting from a model of “high-volume but short” flows to a higher-yield tourism model requires a coordinated mix of infrastructure, service, and marketing instruments. The effectiveness of public and industry policy in this area should therefore be assessed not only by arrival numbers but

also by indicators of average length of stay, in-destination expenditure, satisfaction (including NPS), and repeat visitation (OECD, 2022; World Bank, 2024).

The study's limitations stem from the limited public granularity of data on foreign visitors' expenditure structures across regions and market segments, as well as from differences in methodologies for counting inbound visitors in national and international statistics - factors that should be considered when interpreting the effects of specific measures (World Bank, 2024). Future research should focus on developing models that quantify the contribution of particular determinants (air connectivity, visa regimes, accommodation quality, event intensity, and digital accessibility) to expenditure and length of stay at the regional level in Kazakhstan, enabling a shift from general recommendations to more precise calibration of tourism and branding policy instruments.

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**ISSN 2518–1467 (Online),**

**ISSN 1991–3494 (Print)**

**<http://www.bulletin-science.kz/index.php/en>**

Ответственный редактор **А. Ботанкызы**

Редакторы: **Д.С. Аленов, Т. Апендиев**

Верстка на компьютере: **Г.Д. Жадырановой**

Подписано в печать 27.02.2026.

46,0 п.л. Заказ 1.