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Management Effectiveness in Kazakhstan's Tourism Sector and Its Impact on Sectoral Development

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ABSTRACT

Tourism is one of Kazakhstan's most promising sectors, capable of making a significant contribution to economic diversification, employment, and regional development. The purpose of the study is to assess the effectiveness of management in Kazakhstan's tourism sector and analyze its impact on sectoral and regional development. The research methodology is a mixed approach that combines quantitative and qualitative methods, as well as correlation and regression analyses. The empirical base consisted of data from a survey of 47 tourism enterprises in the Almaty, Akmola, and Mangystau regions for 2015-2024, as well as the results of 23 semi-structured interviews with managers and industry experts. The results of the study showed that the level of managerial efficiency varies significantly: the average TMEI value was 54.2 points, while the gap between large and small enterprises reached 33.2 points. A strong positive relationship was found between TMEI and industry development indicators: the growth of international tourist arrivals ($r = 0.78$; $p < 0.001$), tourist spending ($r = 0.72$), the contribution of tourism to regional GDP ($r = 0.65$), and the online reputation of destinations ($r = 0.81$). Regression analysis confirmed that managerial efficiency is a statistically significant factor in enterprises' financial performance ($\beta = 0.34$; $p = 0.015$). The prospects for further research include expanding the sample, conducting panel and longitudinal studies, and adapting the TMEI index to monitor the effectiveness of tourism policy and conducting comparative analyses across countries with economies in transition.

KEYWORDS: Tourism Economics, Tourism Management, Management Efficiency, Enterprise Performance, Business Strategy, Regional Economy, Competitiveness

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1. INTRODUCTION

The tourism industry is widely recognized as one of the most dynamically developing sectors of the global economy, making a substantial contribution to economic growth, employment generation, and regional development. Before the COVID-19 pandemic, tourism accounted for a significant share of global value added and labor markets, confirming its role as an essential driver of socio-economic development in many countries. In the context of globalization and increasing international competition, the effectiveness of tourism development has become increasingly dependent not only on the availability of natural and cultural resources but also on the quality of governance and management practices within the sector.

Kazakhstan possesses considerable prerequisites for the development of tourism, including its strategic geographical location between Europe and Asia, diverse natural landscapes, and rich cultural and historical heritage. The country offers a wide range of tourism resources, encompassing natural attractions, protected areas, and internationally recognized cultural sites. These characteristics position Kazakhstan as a potentially attractive destination in the international tourism market and create opportunities for tourism to contribute to economic diversification and regional development.

The importance of tourism development has been consistently emphasized in Kazakhstan's state policy. Since the early 2000s, tourism has been designated as one of the priority sectors within national strategies aimed at diversifying the economy and reducing dependence on extractive industries. Many sectoral programs and policy initiatives have been implemented to improve tourism infrastructure, expand international accessibility, and enhance the country's visibility in global markets. Despite these efforts, the overall contribution of tourism to national economic indicators remains relatively modest, and Kazakhstan continues to lag behind several comparable countries in tourism competitiveness and inbound tourist flows.

This discrepancy between the country's substantial tourism potential and the relatively low level of realized outcomes indicates the presence of systemic constraints on the sector's development. Empirical evidence suggests that these constraints are not limited to infrastructure or resource availability but are closely linked to the effectiveness of governance and management at national, regional, and enterprise levels. In this regard, insufficient coordination among stakeholders, uneven managerial capacity across regions and organizations, and limitations in strategic planning and implementation may significantly affect the performance and sustainability of tourism development.

Despite the growing recognition of management quality as a key determinant of tourism performance, academic research on tourism development in Kazakhstan has primarily focused on descriptive assessments of tourism potential, policy initiatives, or individual market segments. Comprehensive empirical studies that systematically examine the effectiveness of tourism management and its impact on sectoral development outcomes remain limited. This gap in the literature highlights the need for an integrated analytical approach that connects management effectiveness with measurable indicators of tourism development.

The purpose of the study is to assess the effectiveness of management in Kazakhstan's tourism sector and analyze its impact on sectoral and regional development. The study seeks to identify key managerial factors shaping sectoral performance, examine trends and structural challenges in tourism development, and evaluate the relationship between management quality and development outcomes over time.

The object of the study is the tourism sector of the Republic of Kazakhstan as a complex socio-economic system. The study examines the effectiveness of tourism management and its impact on sectoral development. The analysis covers the period from 2015 to 2024, allowing examination of pre-pandemic

dynamics, the COVID-19 shock, and post-pandemic recovery.

The findings of this research are expected to contribute to both academic and practical discussions by providing empirical evidence on the role of management effectiveness in tourism development. From a practical perspective, the results may be used by policymakers, regional authorities, and tourism enterprises to improve governance mechanisms, strengthen strategic planning, and enhance the competitiveness of Kazakhstan's tourism sector.

2. LITERATURE REVIEW

An analysis of international and regional academic literature indicates that tourism management effectiveness is a complex and multidimensional phenomenon encompassing strategic, organizational, institutional, and technological components. The theoretical foundations of tourism management research were developed within the broader framework of general management theory and subsequently adapted to the specific characteristics of the tourism and hospitality sector, which is characterized by high service intensity, dependence on human capital, and strong sensitivity to external institutional conditions.

The conceptual understanding of management effectiveness originates from classical management theory. In his seminal work, Drucker (1954) introduced a fundamental distinction between effectiveness, the ability to choose appropriate strategic objectives, and efficiency, the ability to optimize operational processes. This distinction remains remarkably relevant for tourism enterprises, which must simultaneously ensure market relevance of tourism products and high-quality service delivery under conditions of demand volatility and seasonality. The development of performance-oriented management approaches was further advanced by Kaplan and Norton (1992), who proposed the Balanced Scorecard framework as a multidimensional system for evaluating organizational performance. Their approach emphasized the need to integrate financial indicators with measures of customer satisfaction, internal processes, and learning and growth, a need that has been widely adopted in tourism and hospitality research.

Within tourism-specific scholarship, significant attention has been devoted to understanding how management practices influence economic and developmental outcomes. Dwyer and Forsyth (1998) developed a comprehensive model for assessing tourism's contribution to economic development, identifying direct, indirect, induced, and catalytic effects. This framework demonstrated that tourism development outcomes are not determined solely by tourist flows but also by managerial decisions that affect investment, infrastructure development, and supply-chain coordination. Subsequent studies expanded this perspective by emphasizing service quality and customer satisfaction as key manifestations of managerial effectiveness. Kozak and Rimmington (2000) showed that tourist satisfaction represents a multidimensional construct reflecting evaluations of destination attributes, service quality, and perceived value, thereby reinforcing the importance of systematic quality management in tourism enterprises.

Several scholars have conceptualized tourism management effectiveness through the lens of resource coordination and organizational capabilities. Sharpley and Vass (2006) defined tourism management as a process of acquiring, deploying, and coordinating resources to create value, while highlighting the structural disadvantages faced by small and medium-sized tourism enterprises, including limited managerial competencies and restricted access to finance. Mndzebele et al. (2013) empirically demonstrated that a synergistic combination of technological innovation, process standardization, and investment in human capital has changed the way businesses operate in many industries, including tourism and hospitality. These findings are supported by

meta-analytical evidence provided by Harrington and Ottenbacher (2009), who confirmed that systematic management practices are associated with superior financial performance, higher service quality, and stronger organizational cohesion.

The growing importance of digital technologies has introduced an additional dimension to the effectiveness of tourism management. Law et al. (2014) demonstrated that destinations characterized by coordinated management structures and integrated digital platforms achieve higher levels of visitor satisfaction and repeat visitation. Their findings suggest that digital transformation in tourism is not merely a technological process, but a managerial one, requiring appropriate competencies, strategic vision, and organizational readiness. At the destination level, Pike and Page (2014) emphasized the coordinating role of destination management organizations in aligning marketing, development, and stakeholder interests, thereby reinforcing the institutional dimension of tourism management effectiveness. This perspective is consistent with earlier policy-oriented research by Pforr (2006), who conceptualized tourism governance as a network-based process involving multiple public and private actors. Building on this governance perspective, Waligo et al. (2013) proposed that the successful implementation of sustainable tourism requires systematic engagement of government, business, and local communities

International empirical studies further indicate that the contribution of tourism to inclusive and sustainable development depends critically on the level of managerial professionalization. Rogerson (2013), analyzing tourism development in developing economies, demonstrated that tourism's economic impact is shaped not only by the scale of tourist arrivals but also by the quality of management within tourism enterprises and institutions. One of the most direct empirical confirmations of this relationship was provided by Adiyia et al. (2017), who identified a strong positive correlation between management maturity and regional tourism development outcomes in a transition economy context. Elfa Kiswara Rahmantya et al. (2019) demonstrated that service quality, hospital information systems, and Islamic work ethics jointly and significantly enhance hospitals' competitive advantage.

Despite the growing international evidence, research focusing on tourism management effectiveness in the countries of the Commonwealth of Independent States (CIS) remains limited. Existing studies suggest that tourism enterprises in post-socialist economies face a standard set of structural and managerial constraints rooted in institutional legacies and uneven capacity development (Tiberghien et al., 2018). Nazarenko and Novikova (2023) examined digital transformation in tourism management across the CIS and other transition economies and identified persistent barriers, including limited financial resources for technological investment, insufficient digital competencies among staff, and infrastructural constraints. Their findings highlight that managerial readiness is a decisive factor for successful digitalization in tourism.

Empirical evidence specific to Kazakhstan remains fragmented. Analyzed quality management practices in hospitality enterprises in Almaty. They found that fewer than 40% of enterprises had formal quality management systems, and that adoption of international standards was primarily limited to major hotel chains. Wroblewski et al. (2022) examined the institutional architecture of tourism governance in Kazakhstan. Some domestic studies point to coordination gaps between national and regional authorities, particularly in the implementation of national tourism strategies and the involvement of local communities (Shilibekova et al., 2016; Akbar et al., 2020; Baymenova et al., 2020). Official data from the Kazakhstan Tourism Board (2023) confirm positive dynamics in tourist arrivals, revenues, and employment; however, these indicators continue to fall short of the country's estimated tourism potential.

Overall, the reviewed literature reveals

several unresolved issues. First, while international research provides strong theoretical and empirical evidence linking management effectiveness to tourism development outcomes, studies focusing on CIS countries remain scarce. Second, in the case of Kazakhstan, existing research primarily addresses tourism potential, policy frameworks, or individual segments, rather than offering a comprehensive empirical assessment of enterprise-level management effectiveness. Third, the mechanisms through which managerial practices translate into regional tourism development outcomes have not been sufficiently explored using integrated quantitative and qualitative methods.

This study seeks to address these gaps by providing a systematic empirical assessment of tourism management effectiveness in Kazakhstan, developing an integrated Tourism Management Effectiveness Index (hereinafter – TMEI), and examining its relationship with enterprise performance and regional tourism development indicators. In doing so, the research extends existing theoretical frameworks and contributes new empirical evidence to the literature on tourism management in transition economies.

3. METHODOLOGY

The study of the effectiveness of tourism management and industry development in the Republic of Kazakhstan is based on a mixed-methods approach combining quantitative and qualitative methods of analysis. The choice of mixed-methods design is due to the multidimensional nature of management in the tourism sector, where the quantitative performance indicators of enterprises are closely interrelated with management practices, the institutional environment, and the subjective assessments of market participants. The use of this approach provides a comprehensive study of tourism management processes and helps identify both general patterns and specific features of individual industry segments.

The logic and sequence of the study are presented in Figure 1, which clearly reflects the main stages of the analysis, from the collection of empirical data to their quantitative and qualitative processing, interpretation of the results, and the development of practical recommendations.

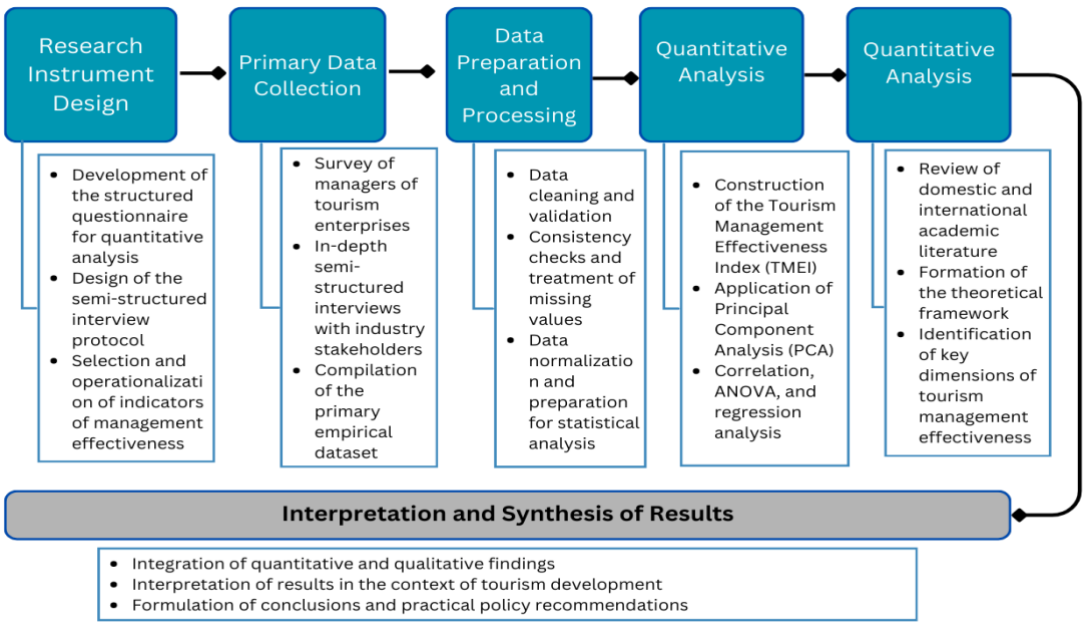


FIGURE 1. Research stages of tourism management effectiveness assessment

The empirical base of the study comprised data collected from 47 tourism enterprises in the Republic of Kazakhstan from March to November 2023, supplemented by official statistical data from the Bureau of National Statistics (2024). The sample was formed using a stratified approach based on the following criteria: the size of the company (large more than 50 employees; medium from 15 to 50 employees; small less than 15 employees); geographical location (Almaty region, Akmola region, Mangystau region); type of enterprise (hotels and guest houses; tour operators and travel agencies; tourist attractions; catering establishments). The use of stratification made it possible to ensure the comparability of observations and conduct a correct comparative analysis of management practices across various segments of the tourism market.

The quantitative part of the study is based on the results of a structured in-person survey of heads of tourism enterprises, as well as on data collected via the online platform Google Forms. The questionnaire included 52 questions grouped into six thematic blocks: organizational characteristics, strategic management, operational efficiency, customer satisfaction, financial performance, and barriers to efficiency improvement.

To comprehensively assess management effectiveness, the TMEI index was developed. The use of a composite index is because management effectiveness is a latent characteristic that cannot be directly measured and requires aggregation of a set of interrelated indicators. In order to reduce the size of the initial data set, identify hidden factors reflecting key aspects of managerial effectiveness, as well as statistically soundly determine the weighting coefficients of the index, the Principal Component Analysis (hereinafter – PCA) method was used. The use of PCA made it possible to minimize subjectivity in setting weights and to ensure a representative aggregation of 15 indicators into four consolidated groups: financial efficiency, operational efficiency, service quality efficiency, and strategic management. The final value of the TMEI index was calculated as a weighted average based on factor loadings.

Before conducting the statistical analysis, a multi-step data preparation procedure was implemented. At the first stage, the data were checked for completeness and logical consistency; questionnaires with a completion rate below 85% were excluded from the analysis. At the second stage, potential outliers were identified using z-scores and the interquartile range, and extreme values were also compared with the primary questionnaire materials. At the third stage, the variables were normalized to ensure their comparability during PCA and regression analysis.

The qualitative component of the study included 23 semi-structured interviews with top managers of tourism enterprises, representatives of regional tourism organizations, and industry experts. The interviews were conducted using a single protocol covering the interpretation of management effectiveness, the identification of development barriers, the analysis of the mechanisms.

All interviews were conducted in compliance with ethical requirements, audio recordings were made with participants' informed consent, and transcripts were fully transcribed and analyzed using MAXQDA 2022. The thematic analysis included the stages of open, axial, and selective coding, enabling the identification of stable semantic categories and interpretative patterns. Statistical data processing was carried out using the SPSS 28.0 software package. The research used descriptive statistics, Pearson correlation analysis, one-way analysis of variance (ANOVA), and multiple linear regression. The level of statistical significance was set at $p < 0.05$. The reliability of the results was ensured through methodological triangulation and the comparison of quantitative and qualitative data.

4. RESULTS

The presented results are based on an analysis of data from 47 tourism enterprises in Kazakhstan, which enabled the identification of key characteristics of their operations,

differences in managerial maturity, service structures, and development dynamics. The analysis revealed substantial heterogeneity within the sector, reflecting territorial, organizational, and institutional differences across enterprises. The main characteristics of the sample are summarized in Table 1, as these parameters form the contextual framework necessary for the interpretation of subsequent empirical findings.

Table 1. Characteristics of tourism enterprises in the sample (n=47)

Characteristic	Category	n
Type of enterprise	Accommodation (hotels, guesthouses)	18
	Tour operators and travel agencies	15
	Attractions / activities	10
	Restaurants and food services	4
Enterprise size	Large (>50 employees)	12
	Medium (15–50 employees)	18
	Small (<15 employees)	17
Geography	Almaty region / Almaty	26
	Akmola region / Astana	14
	Mangystau region	7
Year established	Before 2000	5
	2000–2010	12
	After 2010	30
Certification	ISO 9001 and others	9
	None	38

Note: compiled by the authors based on the 2023–2024 survey

The sample structure reflects the specificity of Kazakhstan's tourism sector, notably the predominance of relatively new enterprises (63.8% founded after 2010), which corresponds to a period of active state support for tourism development. The low level of international certification (19.1%) also indicates a formative development trajectory in which managerial maturity and the adoption of modern management tools become critical factors.

Moving to the analysis of management practices, it is essential to emphasize the substantial differences observed across enterprise categories, particularly in size and organizational complexity (Table 2).

Table 2. Adoption of key management practices (% of enterprises)

Management practice	Overall	Large	Medium	Small	χ^2 (p)
Written strategy	46.8	91.7	61.1	11.8	<0.001
KPI monitoring	38.3	83.3	38.9	5.9	<0.001
SOP documentation	40.4	75.0	50.0	11.8	<0.001
Training programs	44.7	91.7	50.0	11.8	<0.001
Customer satisfaction measurement	36.2	75.0	38.9	0.0	<0.001
Quality management systems (ISO)	19.1	50.0	22.2	0.0	<0.001
CRM systems	31.9	83.3	27.8	0.0	<0.001

Note*:* compiled by the authors based on calculations

These differences largely determine the heterogeneity of managerial approaches and variations in operational effectiveness among tourism enterprises. The comparative analysis demonstrates that large enterprises adopt a more systematic and comprehensive approach to management, covering a wide range of functional areas and processes: the implementation rate of management practices in this segment ranges from 50% to 91.7%. In

contrast, small enterprises make minimal use of formalized management methods, relying primarily on experiential and intuitive approaches. Statistical verification using the χ^2 test confirmed significant differences between groups ($p < 0.001$), highlighting the sector's structural heterogeneity and the need for a segmented analytical approach.

To provide a more integrated assessment of management quality and identify underlying patterns, an integrated metric, the TMEI index was developed. The index is based on PCA of 15 performance indicators, which enabled dimensionality reduction and the identification of key latent factors. The model yielded three components that together explain 78.3% of the total variance.

The structure and explanatory power of the extracted components are presented in Table 3.

Table 3. Structure of the TMEI (PCA Results)

Component	Eigenvalue	% variance explained	Key loadings
Financial/ operational efficiency	5.21	47.4	Revenue/employee, profitability, occupancy
Service quality	2.16	19.6	Customer satisfaction, repeat visits, and complaints
Strategic management	1.88	17.1	Strategic plans, KPI monitoring, staff training
Total	9.25	78.3	—

Note: compiled by the authors based on calculations

The results of the analysis of the main components presented in Table 3 indicate the high explanatory power of the developed TMEI index. Collectively, the three identified components explain 78.3% of the total variation in the baseline indicators, which indicates the adequacy of the factor model and the validity of using TMEI for a comprehensive assessment of the managerial effectiveness of tourism enterprises.

The largest contribution to the index structure is made by the financial and operational efficiency component, which accounts for 47.4% of the explained variance. This reflects the key role of performance and financial performance indicators, such as revenue per employee, profitability, and workload, in shaping overall management effectiveness. The second component, related to the quality of service, explains 19.6% of the variation and characterizes the importance of customer factors, including tourist satisfaction, repeat visits and the number of complaints. The third component reflects the strategic aspect of management and explains 17.1% of the variance, which underlines the importance of having formalized strategic plans, a system for monitoring key performance indicators and investments in personnel development.

In general, the results obtained confirm the multidimensional nature of the effectiveness of tourism management and indicate that sustainable management results are formed through a combination of financial and operational performance, customer orientation and strategic management.

The TMEI ranges from 18 to 89 ($M = 54.2$; $SD = 18.3$). The distribution of the index is presented in Figure 2.

The distribution of TMEI scores among the surveyed enterprises demonstrates substantial heterogeneity in managerial effectiveness. A total of 25.5% of organizations fall into the low-performance group (TMEI < 40), nearly half (48.9%) exhibit a medium level (40–70), and another 25.5% achieve high index values (>70). This structure reflects varying degrees of managerial maturity and highlights pronounced segmentation within the sector.

To deepen the analysis of these differences and identify the factors shaping variability in managerial effectiveness, a comparative assessment of TMEI was conducted with respect to key enterprise characteristics.

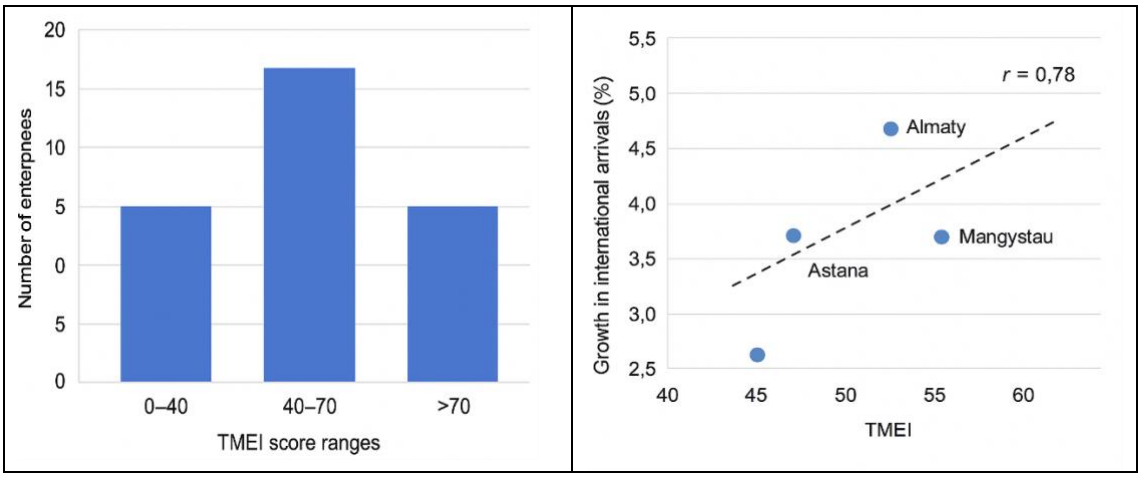


Figure 2. Distribution of TMEI scores across enterprises (n = 47)

The distribution of TMEI scores among the surveyed enterprises demonstrates substantial heterogeneity in managerial effectiveness. A total of 25.5% of organizations fall into the low-performance group (TMEI < 40), nearly half (48.9%) exhibit a medium level (40–70), and another 25.5% achieve high index values (>70). This structure reflects varying degrees of managerial maturity and highlights pronounced segmentation within the sector.

To deepen the analysis of these differences and identify the factors shaping variability in managerial effectiveness, a comparative assessment of TMEI was conducted with respect to key enterprise characteristics. Significant disparities are observed across both organizational size and enterprise type.

The post-hoc Tukey tests confirmed statistically significant differences between large and medium enterprises ($p < 0.001$) and between large and small enterprises ($p < 0.001$). These findings underscore the importance of enterprise scale as a determinant of managerial capacity, influencing the implementation of modern management practices and overall performance.

Given the substantial variation in managerial effectiveness at the enterprise level, the next step was to examine the extent to which these differences are reflected in the regional context. Correlation analysis revealed strong positive associations between average regional TMEI and key indicators of tourism development, as shown in Table 4.

Table 4. Correlations between regional TMEI and tourism development indicators for 2015–2024

Regional Indicator	r	p-value	Almaty	Astana	Mangystau
Growth of international arrivals (%)	0.78	<0.001	58.2	52.8	43.1
Tourist spending (USD)	0.72	0.001	580	420	380
Employment growth (%)	0.68	0.003	3.8	4.2	5.1
Contribution to GDP (%)	0.65	0.006	4.2	2.8	3.5
Online reputation score	0.81	<0.001	8.2	7.6	6.9

Note: compiled by the authors (n = 3 regions)

As shown in Table 4, regions with higher average TMEI values tend to exhibit more dynamic tourism development, including greater growth in international arrivals, stronger infrastructure expansion, and higher occupancy rates in accommodation facilities. These findings confirm that managerial effectiveness serves as an essential driver of regional tourism performance.

To illustrate this relationship, the following section presents a graphical analysis of the association between average TMEI and the

growth rate of international arrivals across Kazakhstan's key tourism regions.

The results presented in the figure clearly demonstrate a strong positive relationship between the average TMEI value and the dynamics of international arrivals. This finding highlights that managerial effectiveness influences not only the performance of individual tourism enterprises but also the broader regional development of the tourism sector. Higher TMEI values are associated with accelerated growth in international tourist flows, underscoring the strategic importance of managerial professionalization for enhancing the competitiveness of tourism destinations. The strength and statistical significance of these relationships are quantified in Table 5.

Table 5. Determinants of operating profitability

Variable	β	t	p	95% CI
TMEI	0.34	2.52	0.015	[0.07; 0.61]
ln(employees)	0.22	1.63	0.110	[-0.05; 0.49]
Type of enterprise	0.18	1.41	0.165	[-0.08; 0.44]
Region	0.15	1.15	0.257	[-0.11; 0.41]
R^2=0,41; Adj.R^2=0,36; F=7,2 (p<0,001) Note: Dependent variable — return on assets (ROA). n = 47.				

Note: compiled by the authors

Given the identified relationship, the next stage of the analysis involved examining how managerial effectiveness affects the financial performance of tourism enterprises. To assess the economic determinants, a multiple regression analysis was conducted, confirming that TMEI is a significant predictor of operational profitability even when controlling for other variables.

The regression results presented in Table 5 confirm that TMEI remains a significant factor influencing the operating profitability of tourism enterprises, even when accounting for organizational size, ownership type, and regional differences. Although the model explains 36–41% of the variation in profitability, indicating moderate predictive power, the sustained statistical significance of TMEI underscores managerial maturity as a key driver of financial sustainability in the sector.

However, quantitative data alone are insufficient to understand the internal mechanisms that shape managerial effectiveness fully. To uncover the underlying processes that explain differences in performance and development trajectories across enterprises, a qualitative analysis was conducted using interviews with representatives from the tourism sector. Thematic coding revealed four major groups of factors influencing managerial practices and their outcomes. These themes are summarized below (Table 6).

Table 6. Main barriers to managerial effectiveness (n = 23 interviews)

Barrier	Frequency (%)	Typical Quote
Financial constraints	78%	“We have no funds for CRM or training.”
Staff turnover	83%	“We train them—and they leave for big chains.”
Skills deficit	70%	“We don’t know how to implement KPIs.”
Weak coordination	57%	“Regional authorities provide no support.”
Seasonality	61%	“We’re full in summer, but winter is silent.”

Note: compiled by the authors

The identified success factors among enterprises with high TMEI scores (>70) demonstrate that consistently strong managerial performance emerges from a combination of strategic orientation, systematic performance monitoring, client-

centeredness, and investments in human capital. In practice, this is reflected in the presence of long-term development plans ("We have a three-year plan pinned on the office wall," general director, TMEI = 82), regular use of analytical tools ("We discuss monthly dashboards in staff meetings," hotel manager, TMEI = 78), heightened attention to service quality ("We review every customer feedback case individually," tour operator, TMEI = 85), and prioritization of staff development ("Ten percent of our profit goes to staff training," restaurant enterprise, TMEI = 76). These examples confirm that managerial effectiveness is shaped through a coherent bundle of coordinated actions rather than isolated initiatives.

Moving to the synthesis of the study's key findings, it is important to emphasize that the results point to a significant structural gap in the level of managerial professionalization within the sector. Large enterprises (25.5%) operate based on elements of modern management systems, whereas the majority of SMEs (74.5%) continue to rely primarily on experiential, ad hoc approaches. The gap in managerial maturity (ΔTMEI = 33.2 points between large and small enterprises) substantially exceeds comparable figures reported in advanced tourism economies, as demonstrated by Harrington & Ottenbacher (2009). This indicates the presence of systemic constraints—primarily the limited availability of consulting and training services for SMEs that inhibit improvements in sectoral competitiveness.

The correlations identified between the TMEI index and key regional tourism indicators (r = 0.65–0.81) indicate the presence of several interconnected external mechanisms through which managerial effectiveness translates into broader sectoral outcomes. Higher levels of organizational effectiveness are associated with improved service quality, which contributes to more favorable online reputations and, consequently, to increased international tourist arrivals. At the same time, effective management practices are linked to greater human capital stability, as lower staff turnover supports consistent service delivery and enhances the overall visitor experience. In addition, the presence of highly professionalized enterprises appears to generate competitive spillover effects, encouraging other market participants to adopt more advanced management practices in order to remain competitive.

The regional dimension of the analysis further reveals pronounced asymmetries in the relationship between managerial effectiveness and tourism development. The Almaty region demonstrates the highest average TMEI values (58.2), reflecting a comparatively higher level of managerial professionalization. In contrast, the Mangystau region exhibits a paradoxical combination of relatively low managerial effectiveness (TMEI = 43.1) and the highest employment growth rate (5.1%). This pattern suggests a risk of extensive or "dirty" growth, characterized by quantitative expansion of employment without a corresponding improvement in the quality and professionalization of management processes, which may undermine the long-term sustainability of tourism development.

The results are broadly consistent with those of Adiyia et al. (2017), who identified a strong positive relationship between managerial maturity and regional tourism development. At the same time, the present study reveals a more pronounced stratification by enterprise size, indicating that disparities in managerial effectiveness between large enterprises and small and medium-sized firms are particularly acute in the Kazakhstani context. Unlike the conclusions drawn by Rogerson and Rogerson (2020), who identified capital constraints as the dominant limitation, the evidence from Kazakhstan suggests that deficits in managerial competencies constitute the primary barrier to improving tourism sector performance.

From a policy perspective, these findings imply that efforts to enhance tourism development should prioritize the strengthening of managerial capacities, particularly among small and medium-sized enterprises. This includes the dissemination of basic management tools, such as performance

indicators, customer relationship management systems, and structured staff training programs. At the regional level, the establishment of advisory and consulting platforms aimed at knowledge transfer and the dissemination of best practices may help reduce managerial asymmetries. At the national level, integrating TMEI-based indicators into the official system for monitoring tourism development could provide a more accurate assessment of sectoral performance and policy effectiveness.

Several limitations of the study should be acknowledged. The cross-sectional research design does not allow for establishing strict causal relationships between managerial effectiveness and development outcomes. In addition, the use of self-reported survey data may introduce response biases. Finally, the relatively small sample size of 47 enterprises suggests the need for future studies using nationally representative datasets to validate and extend the results.

The results demonstrate that the potential of Kazakhstan's tourism sector is limited not so much by macro-level constraints as by micro-level managerial effectiveness. Systematizing management practices has the potential to double the sector's economic contribution. Strengthening managerial capacities thus emerges as a strategic priority for unlocking sustainable tourism development in Kazakhstan.

5. CONCLUSION

The present study provides a systematic assessment of tourism management effectiveness in Kazakhstan. It demonstrates a clear relationship between managerial practices at the enterprise level and tourism development outcomes at the regional level. Based on the analysis of data from 47 tourism enterprises and 23 in-depth interviews with industry managers, the research confirms the existence of a substantial gap in managerial professionalization within the sector. Large enterprises tend to operate based on formalized and systematized management approaches, achieving high levels of managerial effectiveness (TMEI = 71.8). In contrast, the majority of small and medium-sized enterprises, which account for 74.5% of the sample, rely predominantly on experiential and ad hoc management practices, reflected in significantly lower TMEI values (38.6–54.1).

A key contribution of the study lies in the development and empirical validation of the TMEI index, which captures the multidimensional nature of management quality in tourism. The index explains 78.3% of the variance in enterprise performance indicators through three core components: financial and operational efficiency, service quality, and strategic management. The statistical results confirm the strong explanatory and predictive capacity of TMEI, particularly with respect to economic performance, where managerial effectiveness emerges as a significant determinant of profitability ($\beta = 0.34$, $p = 0.015$).

The empirical findings further reveal statistically significant associations between managerial effectiveness and regional tourism development indicators, including international tourist arrivals, visitor satisfaction, and the sector's contribution to gross domestic product. These relationships indicate that management quality generates broader external effects that extend beyond individual enterprises, influencing destination reputation, the stability of human capital, and competitive dynamics within regional tourism systems. In this context, higher levels of managerial effectiveness contribute to more sustainable and resilient tourism development trajectories.

One of the most salient results of the study is the identification of a pronounced managerial professionalization gap between large enterprises and small and medium-sized firms, amounting to a difference of 33.2 TMEI points. This gap reflects structural limitations faced by SMEs, including restricted access to consulting services, limited training opportunities, and the absence of formal management standards. Empirical evidence shows that large enterprises adopt effective management practices several times more

frequently than small firms, reinforcing asymmetries in sectoral development.

The regional analysis provides additional insights into the differentiated nature of tourism development in Kazakhstan. While the Almaty region demonstrates relatively high levels of managerial effectiveness, the Mangystau region exhibits a paradoxical pattern in which low TMEI values coexist with the highest employment growth in the sector. This combination points to a risk of unsustainable or extensive growth, characterized by quantitative expansion without corresponding improvements in managerial quality, which may undermine long-term competitiveness and service standards.

The practical implications of the research underscore the need to prioritize managerial capacity-building as a central element of tourism policy. Strengthening the diffusion of basic management tools, performance monitoring systems, and structured training programs among small and medium-sized enterprises may substantially enhance sectoral performance. At the regional level, institutional mechanisms that facilitate knowledge transfer and coordination can help reduce existing disparities. In contrast, at the national level, the integration of TMEI-based indicators into tourism monitoring systems may improve the effectiveness of policy evaluation.

Overall, the study demonstrates that tourism development in Kazakhstan is constrained less by macroeconomic factors such as infrastructure or marketing and more by micro-level managerial effectiveness. The systematic professionalization of management practices among SMEs has the potential to significantly increase the sector's contribution to economic growth and employment over the medium term, thereby strengthening the sustainability and competitiveness of Kazakhstan's tourism industry.

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