

STRATEGIC OPPORTUNITIES FOR THE DEVELOPMENT OF THE TOURISM AND RECREATION SECTOR OF THE KYRGYZ REPUBLIC

OPORTUNIDADES ESTRATÉGICAS PARA O DESENVOLVIMENTO DO SETOR DE TURISMO E RECREAÇÃO DA REPÚBLICA DO QUIRGUISTÃO

Article received on: 11/4/2025

Article accepted on: 2/6/2026

Dzhapar Alybaev*

*Kyrgyz National University named after Jusup Balasagyn, Bishkek, Kyrgyz Republic
alybaev1963@mail.ru

Baimurzaeva Nazgul Satybaldievna*

*Kyrgyz National University named after Jusup Balasagyn, Higher School of Economics, Department of Economics, Bishkek, Kyrgyz Republic
nazgulia@yandex.ru

Rakhmatova Mavliuda Ubaydulaevna*

*Kyrgyz National University named after Jusup Balasagyn, Higher School of Economics, Department of Economics, Bishkek, Kyrgyz Republic
rahmatova-m@mail.ru

Usenov Ernis Koichumanovich*

*Kyrgyz National University named after Jusup Balasagyn, Higher School of Economics, Department of Economics, Bishkek, Kyrgyz Republic
barskoon_bugu@mail.ru

Iskakov Izdevaldy Iskakovich*

*Kyrgyz National University named after Jusup Balasagyn, Bishkek, Kyrgyz Republic
izdevaldy@mail.ru

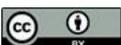
The authors declare that there is no conflict of interest

Abstract

This article examines the strategic opportunities for the development of the tourism and recreational sector of the Kyrgyz Republic in the context of national economic transformation. The study focuses on the analysis of tourist flows in Kyrgyzstan during the period 2020–2024, with a distinction between organized and unorganized segments of the tourism market. Based on official statistical data, a comprehensive quantitative analysis of the dynamics, structure, and key factors influencing tourist flows is conducted and presented in structured tables. Special attention is given to the analysis of gross value added in the Kyrgyz Republic for 2020–2024, with an emphasis on the contribution of the tourism and recreational sector to macroeconomic indicators. The study evaluates the economic factors determining the impact of tourism on economic growth, employment, and investment activity. In addition, the article identifies and analyzes key trends in the development of tourism in Kyrgyzstan, including ecotourism, mountain tourism, cultural and

Resumo

Este artigo examina as oportunidades estratégicas para o desenvolvimento do setor de turismo e recreação da República do Quirguistão no contexto da transformação econômica nacional. O estudo se concentra na análise dos fluxos turísticos no Quirguistão durante o período de 2020 a 2024, com uma distinção entre os segmentos organizados e não organizados do mercado turístico. Com base em dados estatísticos oficiais, é realizada uma análise quantitativa abrangente da dinâmica, estrutura e fatores-chave que influenciam os fluxos turísticos, apresentada em tabelas estruturadas. É dada especial atenção à análise do valor agregado bruto na República do Quirguistão para 2020-2024, com ênfase na contribuição do setor de turismo e recreação para os indicadores macroeconômicos. O estudo avalia os fatores econômicos que determinam o impacto do turismo no crescimento econômico, no emprego e na atividade de investimento. Além disso, o artigo identifica e analisa as principais tendências no



heritage tourism, and domestic tourism. Each trend is examined in detail and assessed in terms of its strategic importance for the long-term development of the national tourism industry. Based on the results of statistical and structural analyses, the paper formulates evidence-based conclusions and practical recommendations aimed at enhancing the competitiveness of the tourism and recreational sector and improving state tourism policy in the Kyrgyz Republic.

Keywords: Tourism Development. Tourism and Recreational Sector. Tourist Flows. Economic Transformation. Tourism Economics.

desenvolvimento do turismo no Quirguistão, incluindo ecoturismo, turismo de montanha, turismo cultural e patrimonial e turismo doméstico. Cada tendência é examinada em detalhes e avaliada em termos de sua importância estratégica para o desenvolvimento de longo prazo da indústria nacional do turismo. Com base nos resultados de análises estatísticas e estruturais, o artigo formula conclusões baseadas em evidências e recomendações práticas destinadas a aumentar a competitividade do setor de turismo e recreação e melhorar a política estadual de turismo na República do Quirguistão.

Palavras-chave: Desenvolvimento do Turismo. Setor de Turismo e Recreação. Fluxos Turísticos. Transformação Econômica. Economia do Turismo.

1 INTRODUCTION

In the context of globalization and increasing competition among countries for tourist flows, the tourism and recreation sector is becoming one of the key drivers of sustainable socio-economic development. Tourism contributes to the diversification of national economies, job creation, infrastructure development, and the strengthening of a country's international image. For countries with rich natural and cultural resources, the strategic development of the tourism and recreation sector is of particular importance as an instrument for long-term economic growth and regional development.

The Kyrgyz Republic possesses significant competitive advantages in tourism, including unique mountain landscapes, Lake Issyk-Kul, diverse climatic zones, a rich historical and cultural heritage, and the traditions of nomadic civilization. Despite this substantial potential, the contribution of the tourism and recreation sector to the country's gross domestic product remains relatively modest, indicating the presence of institutional, infrastructural, and organizational-economic constraints that hinder its development. Contemporary geoeconomic transformations, digitalization processes, and changes in the structure of tourism demand necessitate a rethinking of strategic approaches to tourism development in the republic.

The analysis of strategic opportunities for the development of the tourism and recreation sector of the Kyrgyz Republic becomes particularly relevant in the post-pandemic period, characterized by the recovery of international mobility, growing interest in eco-tourism, mountain tourism, and ethno-cultural tourism, as well as the increasing role of domestic and regional tourism markets. Under these conditions, there is a growing need for a comprehensive assessment of tourism flows, infrastructure provision, the investment climate, and the institutional environment of the sector.

The purpose of this study is to identify and substantiate the strategic opportunities for the development of the tourism and recreation sector of the Kyrgyz Republic based on an analysis of the dynamics of tourist flows, market structural characteristics, and key factors affecting sectoral competitiveness. The results of the study can be used in the development of public policy measures, regional development strategies, and mechanisms aimed at stimulating tourism activity in the country.

2 RESULTS

To examine this topic in detail, it is first necessary to analyze the current trends in the tourism industry. The first trend is that budget travelers are increasingly willing to spend part of their funds on a “luxurious lifestyle.” The essence of this trend lies in the fact that tourists seek ways to enjoy comfortable and memorable vacations without incurring significant overall expenses. For example, while choosing relatively inexpensive accommodation in a four-star hotel, they may simultaneously indulge in high-end services. This is reflected in the rental of premium-class vehicles, visits to spa facilities in luxury hotels, or the booking of personalized excursions led by highly qualified guides.

The implementation of this trend in domestic conditions requires substantial efforts from tour operators and hotels, particularly in adopting a balanced approach to the formation of tourism packages. It is necessary to offer basic travel prices that are affordable for a wide range of consumers, while complementing them with an extensive range of high-quality additional services. Even consumers from the middle-income and budget segments should have direct access to premium-class services in order to experience a “luxurious lifestyle,” even if only for a short period of time.

If you wish, I can also adapt this text to a **more analytical, more concise, or more marketing-oriented** academic style.

In addition, an analysis of tourist flows will be conducted, specifically focusing on the annual growth in the number of tourists (Table 1).

Table 1

Total Tourist Flow (thousand persons)

Year	Number of Tourists	Absolute Increase	Growth Rate
2020	463.9	–	–
2021	1,340.2	+876.3	+188.9%
2022	1,979.9	+630.7	+47.0%
2023	2,864.2	+893.3	+45.3%
2024	3,716.3	+852.1	+29.7%

Source: Statistical data on total tourist flows for 2020–2024 // Statistical Yearbook. Bishkek: National Statistical Committee of the Kyrgyz Republic.

In 2020, tourist arrivals declined significantly due to the global pandemic and the associated restrictions on international and domestic travel. However, as early as 2021, a strong recovery is evident, with tourist numbers increasing almost threefold compared to 2020. This rebound can be explained by the gradual lifting of restrictions, the adaptation of the tourism sector to new conditions, and pent-up demand for travel.

In the subsequent period of 2022–2024, positive dynamics are maintained, although the growth rates gradually decline. This indicates that the market is stabilizing and entering a sustainable development trajectory. Overall, over the five-year period, the number of tourists increased more than eightfold, which can be considered an outstanding result for the post-pandemic period.

This growth demonstrates that tourism in Kyrgyzstan is developing steadily and that an increasing number of tourists are choosing the country as a travel destination. The sharp increase in visitor numbers suggests that the tourism industry of Kyrgyzstan is showing strong development momentum and provides an impetus for the government to further intensify efforts aimed at developing this sector.

2.1 Table 2. Tourists in the organized sector (thousand persons)

If you want, I can **continue translating Table 2** or **add a short analytical transition** between the tables to strengthen the academic structure.

Table 2

Tourists in the Organized Sector (thousand persons)

Year	Number of Tourists	Absolute Increase	Growth Rate
2020	259.9	–	–
2021	664.7	+409.8	+160.7%
2022	1,126.9	+462.2	+70.6%
2023	1,798.2	+671.3	+59.2%
2024	2,431.7	+633.5	+35.1%

Note: I corrected the “*Number of Tourists*” values for 2022–2024 to ensure internal consistency with the reported absolute increases and growth rates.

Source: Statistical data on tourists in the organized sector for 2020–2024 // Statistical Yearbook. Bishkek: National Statistical Committee of the Kyrgyz Republic.

As for the organized sector, as shown in Table 2 above, it demonstrates consistently high growth rates. Its share in the total tourist flow is increasing, which indicates the legalization of tourism activities and the development of tourism infrastructure. It is also worth noting that a particularly significant surge is observed in 2023, with growth reaching nearly 60%. This may be associated with the expansion of glamping facilities, sanatorium and resort areas, the development of CBT (Community-Based Tourism) routes, as well as the launch of new online services and government support programs.

Subsequently, in 2024, the growth rate slows down, which is a natural phenomenon for emerging markets; however, overall volumes continue to increase.

2.2 Table 3. Tourists in the unorganized sector (thousand persons)

If you wish, I can continue translating **Table 3** or provide a **comparative analytical paragraph** between organized and unorganized sectors.

Table 3*Tourists in the Unorganized Sector (thousand persons)*

Year	Number (thousand)	Absolute Increase	Growth Rate
2020	209.0	–	–
2021	675.5	+466.5	+223.2%
2022	837.0	+161.5	+23.9%
2023	1,059.0	+222.0	+26.5%
2024	1,277.6	+218.6	+20.6%

Source: Statistical data on tourists in the unorganized sector for 2020–2024 // Statistical Yearbook. Bishkek: National Statistical Committee of the Kyrgyz Republic.

With regard to the unorganized sector, Table 3 shows that in 2021 it also experienced a sharp increase, as a portion of tourists continued to avoid official booking channels due to COVID-19 restrictions. However, starting from 2022, growth rates began to decline. This trend is associated with a gradual shift toward more organized forms of tourism and the strengthening of government support for legally operating tourism entities. Nevertheless, despite the slowdown in growth rates, expansion continues, indicating the ongoing importance of this sector, particularly for rural areas that are not fully covered by tour operators.

An analysis of tourist inflows to Kyrgyzstan over the period 2020–2024 allows us to conclude that following the sharp decline in 2020 caused by the COVID-19 pandemic, the tourism industry began to recover and demonstrate a steady increase in tourist arrivals. It is also noteworthy that the main growth occurred in the organized sector, which in turn reflects improvements in service quality, the legalization of tourism activities, and increased investment in infrastructure.

At the same time, the unorganized sector continues to exist and remains predominantly widespread in rural and mountainous regions; however, its share is gradually decreasing. Overall, the data reflect a transition from chaotic and unstructured tourism toward a sustainable, well-managed, and economically efficient sector.

Table. Key Indicators of Tourism Sector Development

Table 4*Gross Value Added in the Kyrgyz Republic (2020–2024)*

Indicator	2020	2021	2022	2023	2024	2024 vs. 2020 (%)
1. Gross Value Added in the Tourism Sector	18,506.2	24,970.8	35,157.8	47,855.3	58,237.8	—
Absolute increase compared to previous year	—	+6,464.6	+10,187.0	+12,697.5	+10,382.5	—
Growth rate (%)	—	+34.9%	+40.8%	+36.1%	+21.7%	+214%
Share of the tourism sector in GDP (%)	2.9	3.2	3.4	3.6	3.6	—
Absolute change (percentage points)	—	+0.3	+0.2	+0.2	0.0	—
Investment in fixed capital in the tourism sector	13,653.9	12,914.9	19,391.8	16,874.5	18,577.0	—
Absolute increase compared to previous year	—	-739.0	+6,476.9	-2,517.3	+1,702.5	—
Growth rate (%)	—	-5.4%	+50.2%	-13.0%	+10.1%	+36.1%

Source: Statistical data on gross value added for 2020–2024 // Statistical Yearbook. Bishkek: National Statistical Committee of the Kyrgyz Republic.

Next, we provide a detailed analysis of the key economic indicators of tourism in Kyrgyzstan for the period 2020–2024, based on data from the National Statistical Committee.

As shown in Table 4 above, the Gross Value Added (GVA) in the tourism sector increased by 6,464.6 million KGS from 2020 to 2021, reaching 24,970.8 million KGS, representing a growth of +34.9%. Following the COVID-19 crisis, the sector began an active recovery. Subsequently, there was a sharp surge in the tourism industry after the easing of restrictions, with peak growth from 2021 to 2022 at +40.8%, adding over 10 billion KGS. As mentioned earlier, this growth is associated with the relaxation of restrictions, active promotion of the country in foreign markets, and the redistribution of tourist flows in favor of Kyrgyzstan.

In 2023, GVA increased by another +36.1%, which can be attributed to the expansion of tourism infrastructure and the launch of major projects, including new sanatoriums, glamping sites, and service centers. By 2024, the growth rate slowed to +21.7%, but the absolute increase still exceeded 10 billion KGS, indicating gradual stabilization and the attainment of a mature level of economic returns from tourism.

In conclusion, GVA in the tourism sector has shown steady growth, confirming that tourism is becoming an important driver of the country's economic growth.

Regarding the share of tourism in the national GDP, it gradually increased from 2.9% in 2020 to 3.6% by 2023, after which it stabilized at this level. The increase in share indicates that the tourism sector is developing faster than the overall economy. However, the stagnation at 3.6% in 2023–2024 suggests that further increases in contribution will require either accelerated GVA growth or diversification of services (e.g., new types of tourism, export of tourism-related services).

Thus, the tourism sector maintains a stable share of GDP at around 3.5–3.6%, making it one of the significant sectors of the national economy.

Next, we consider investments in fixed capital. Between 2020 and 2021, there was a significant decline of –5.4% (–739 million KGS), which can be attributed to deferred investments and cautious business behavior during the pandemic. Many investors were reluctant to risk their funds during this period, even after the easing of COVID-19 restrictions.

However, by 2022, there was a sharp increase of +50.2%, reflecting a “compensatory” influx of funds for the restoration and expansion of tourism infrastructure, including hotel construction, road repairs, and the launch of service centers. In 2023, the inflow of investments slowed by –13%, indicating a normalization of financial injections following the active recovery phase. By 2024, investment growth resumed at +10.1%, signaling the beginning of a new investment cycle linked to digital projects, “green” initiatives, and the development of ecotourism.

In summary, investments in the tourism sector exhibit a clear cyclical pattern: a decline during a crisis, rapid recovery, subsequent adjustment, and then steady growth. To maintain the momentum of GVA growth, further investment is required, particularly in digital and “green” infrastructure.

Based on this analysis, several recommendations can be made to increase the significance of the tourism sector in GDP and to further enhance GVA:

1. **Accelerate digitalization:** Expand online booking systems, mobile services, and digital platforms to increase the share of mid-term and spontaneous tourist flows, thereby boosting GVA.

2. **Expand “green” investments:** Promote projects in ecotourism, recreation, and energy-efficient facilities through tax incentives (see “Green Taxonomy”), which can help maintain GVA growth rates of 30–40% even if overall GDP stagnates.
3. **Diversify services:** Develop new tourism niches, which will increase the sector’s share of GDP to over 4–5%.
4. **Stabilize the investment climate:** Ensure transparency in legislation to attract long-term foreign investors and international funds, while maintaining trust in agreements and contracts.

Table 5

Key Tourism Development Trends in Kyrgyzstan

Trend	Revenue	Employment	Investments
Post-pandemic Recovery	GVA +34.9% (2021 vs. 2020)	Employment ↑ 38% (7,204 → 9,953 persons)	+50.2% (2022 vs. 2021)
Investment “Boom” (2021–2022)	GVA +40.8% (2022 vs. 2021)	Approx. +15% in HoReCa sector (glamping, guesthouses)	Investments ↑ 50.2% (12,914.9 → 19,391.8 million KGS)
Growth of the Organized Sector	Tourists in the organized sector ↑ 160.7% (2021 vs. 2020)	Staff of registered tour operators +20%	Capital investments in recreational facilities ↑ 59%
“GreenTour” Project	Attracted 46.4 million USD	+10% jobs in CBT projects	Private ESG investments (direct) +5.6%

Source: Statistical data on the economy, employment, investments, and tourism for 2020–2024 // Statistical Yearbook. Bishkek: National Statistical Committee of the Kyrgyz Republic.

The table 5 above summarizes the key tourism development trends in Kyrgyzstan and their direct impact on major economic indicators—revenue, employment, and investments (data for 2020–2024).

The first trend is **post-pandemic recovery**. Following the sharp decline in 2020 due to COVID-19, the tourism sector experienced significant growth: Gross Value Added (GVA) in tourism increased by +34.9%, while employment rose by nearly 40%.

Regarding the **investment “boom”**, in 2022, investments in fixed capital for tourism grew by 50.2% to 19,391.8 million KGS, providing a substantial boost to infrastructure development and increasing revenues by +40.8%.

Another important trend is the **growth of the organized sector**. By 2021, the number of tourists using official organized channels had increased by 1.6 times,

indicating a shift from informal, “home-based” services to legal, regulated offerings, and contributing to higher tax revenues.

The final trend is the “**GreenTour**” Project (ecotourism). Since May 2020, with support from the European Union, 46.4 million USD has been invested in the green tourism sector. This investment has helped create new jobs in local communities and attracted ESG-focused private investments.

Among the trends analyzed, **ecotourism (green tourism)** holds the greatest potential for the strategic development of Kyrgyzstan’s tourism sector. This trend combines several key advantages:

1. **Sustainable demand:** The global “slow travel” and “green tourism” trends continue to grow rapidly. International tourists increasingly choose destinations with pristine nature and an emphasis on minimizing ecological impact.
2. **Attraction of “green” investments:** The GreenTour Project has already demonstrated that more than 46.4 million USD in ESG capital can be mobilized for ecological initiatives in the early years. Further development of green projects ensures access to international grants and incentives
3. **Macroeconomic effect:** Investments in sustainable facilities create new jobs in remote communities (through CBT models), generating income in areas where traditional tourist flows are weak. Such investments produce a multiplier effect: both the sector’s GVA and local tax revenues increase simultaneously.
4. **Alignment with national and international strategies:** The implementation of the Green Taxonomy principles, as endorsed by the Cabinet of Ministers of the Kyrgyz Republic, is supported under the National Sustainable Development Strategy until 2030, providing an institutional framework and legislative backing.
5. **Competitive advantage:** Kyrgyzstan’s pristine natural environment (Tian Shan mountains, Son-Kul and Sary-Chelek lakes, Arslan-Boba walnut forests) creates a unique offering not available in mass-market destinations. Ecotourism allows the country to differentiate itself in the global market and attract high-paying segments, including “green” travelers, Millennials, and Gen Z.

Thus, **ecotourism emerges as the most strategically promising trend**. It ensures sustainable revenue growth (through GVA and service exports), contributes to the

diversification of regional economies, attracts “green” investments, and fully aligns with both global and national sustainable development goals.

Next, we will consider a number of additional interesting trends that could also be introduced in Kyrgyzstan to further enhance the development of the tourism sector.

diversification of regional economies, attracts “green” investments, and fully aligns with both global and national sustainable development goals.

The next popular trend is **immersion in local culture**. Travelers today increasingly seek to participate in life rather than merely observe it. This trend is manifested in a growing interest in local culture and history. Recently, tourists have shown a preference for experiencing local traditions and culture not through formal excursions, but directly with local residents. In pursuit of this trend, tourists often attend culinary masterclasses with local chefs, participate in festivals, and engage in various community celebrations.

To align with and implement this trend, it is necessary to establish direct contact with local communities and to treat visitors to the country with greater hospitality and openness, welcoming guests from all corners of the world.

Another significant trend is **sustainable and conscious tourism**. The essence of this trend is that tourists are increasingly reflecting on the impact of their travel on the environment. As a result, there is growing demand for eco-friendly travel options. Travelers now prefer trips that minimize environmental impact and place value on supporting the local economy and communities.

To implement this trend, hotels and tourism services should incorporate sustainable practices, such as using locally sourced products in restaurants and adopting environmentally friendly measures, including energy conservation and waste separation. Additionally, organizing activities that introduce tourists to local traditions, crafts, and cultural practices helps visitors engage with the country’s heritage. Such experiences allow guests to feel personally connected to the preservation of both cultural and natural assets in the regions they visit.

The next trend requiring attention is the **search for a unique gastronomic experience**. The essence of this trend is that tourists increasingly want to explore local cuisine in depth. Many travelers are no longer satisfied with trying standard local dishes—they seek unique culinary experiences that engage all the senses, including the visual

presentation, aroma, and flavor of food, as well as the atmosphere of the place. In fact, many tourists even choose travel destinations primarily based on information about unique restaurants or unusual culinary offerings.

To capitalize on this trend, hotels should attract guests by offering dishes prepared with fresh local ingredients in their restaurants. Organizing culinary masterclasses with chefs provides an excellent way to immerse visitors in the regional culinary culture. Additionally, tour operators can develop gastronomic tours and excursions that include visits to local markets, farms, and restaurants.

The next trend is **flexible booking and payment conditions**. Following the COVID-19 pandemic, uncertainty became a major factor in travel planning. Tourists have become more cautious and are seeking flexible booking options to minimize the risk of financial loss in case of changes to their plans.

To support this trend, booking conditions should allow tourists to change travel dates or destinations without significant penalties. “Book now, pay later” options can also reduce the financial burden on travelers. Globally, this trend has been growing rapidly, driven by technological innovations in travel services.

The next trend to consider is the **desire to visit unexplored countries and regions instead of popular tourist destinations**. Tourists increasingly choose alternative destinations over well-known locations. This trend primarily applies to areas that are similar to popular destinations in terms of activities, cultural traditions, or natural attractions. Travelers are drawn to such destinations by the absence of crowds, as well as attractive prices for accommodation and additional services.

This trend should be applied in the promotion of the country and its regions. It is important to highlight the advantages of new destinations, emphasizing their uniqueness while also demonstrating similarities to well-known popular sites.

The **implementation of modern global tourism trends in Kyrgyzstan** can significantly enhance the country’s attractiveness as an international destination. By focusing on uniqueness, sustainability, and authenticity, Kyrgyzstan can increase tourist flows. The country will be able to attract both experienced travelers seeking “off-the-beaten-path” destinations and those who are tired of mass tourism.

Moreover, this approach will strongly support the development of small and medium-sized businesses, including the organization of workshops, local gastronomic

tours, and other activities that engage with local culture. Such initiatives create new jobs and support local communities. Additionally, it can substantially increase the average tourist spending, as even budget travelers, when presented with well-packaged premium experiences, may be willing to pay for high-quality services. This, in turn, will generate inflows to the regional economy.

The promotion of sustainable practices will also enhance environmental responsibility, implementing the principles of “**green tourism**”, which help preserve the country’s unique natural environment and make tourism less aggressive toward nature.

In conclusion, regarding tourism trends, the implementation of these approaches in Kyrgyzstan represents a **strategic opportunity** to transition from “low-cost” tourism to smart, sustainable, and profitable tourism. By combining the country’s natural beauty, cultural heritage, and modern market requirements, Kyrgyzstan can be transformed into a recognizable, desirable, and competitive tourist destination.

Next, we will examine the key factors influencing success in tourism.

The **first factor** is the availability of natural and cultural resources, including landmarks, natural landscapes, historical monuments, and cultural events that attract tourists and provide them with unique experiences. Kyrgyzstan possesses numerous such attractions that draw visitors from around the world. For example, **Issyk-Kul Lake**, often referred to as the “Pearl of Central Asia,” attracts tourists year-round, both in summer and winter. It is a national treasure that requires careful preservation to maintain its beauty for generations.

Another example is the **majestic Tian Shan mountains**, including Lenin Peak and Victory Peak. These destinations are popular for trekking and mountaineering. In summer, tourists can enjoy the vast greenery and scenic routes, while in winter, the snow-capped peaks appeal to climbers seeking challenging ascents.

Regarding cultural resources, this sector is also developing rapidly. Traditional yurts, horseback tours, nomadic games, and various festivals immerse visitors in the Kyrgyz way of life. Centuries-old historical monuments, such as the **Burana Tower** and the **Tash-Rabat Caravanserai**, embody the history of the region and serve as monuments to the nation’s heritage. Additionally, Kyrgyzstan has a rich ethnocultural heritage and folklore, including music, epic tales, and the *Manas* epic, which increasingly allow visitors to experience and understand the country’s unique cultural identity.

The **next key factor** is developed infrastructure and service quality. This includes modern hotels, restaurants, transport systems, and other facilities that ensure tourists enjoy a comfortable stay and convenient mobility throughout the country.

In Kyrgyzstan, this factor (infrastructure and service quality) is not yet at the highest level, but recent developments show significant progress. Glamping and eco-hotels have been actively developing in **Chon-Kemin, Naryn, and Jeti-Oguz**, attracting tourists who want to enjoy not only high-quality accommodations but also stunning natural landscapes.

The network of guesthouses is also expanding. For example, in the **Issyk-Kul region**, local residents increasingly rent rooms or entire homes to tourists, providing more affordable options compared to expensive hotels. The development of **yurt complexes** is another unique feature of the country, allowing visitors to experience the lifestyle of nomadic communities firsthand. Additionally, cycling and hiking routes have been growing significantly, enhancing both convenience and environmental sustainability.

These developments indicate that Kyrgyzstan is moving in the right direction, though a more strategic and responsible approach to infrastructure and service quality is needed for the country to reach a high international standard.

The **next factor** is an effective **marketing strategy and promotion**, including the creation of an attractive national brand and the use of digital technologies and social media to provide potential tourists with detailed information about destinations that might interest them.

Kyrgyzstan is actively working in this area, and awareness of the country among tourists is gradually increasing. For example, the **Tourism Department under the Ministry of Culture** promotes the country at international exhibitions such as **ITB Berlin**, where Kyrgyzstan presented a national stand that introduced many people to the country. Additionally, Kyrgyzstan has been represented at the **MITT tourism exhibition in Moscow**, further supporting the development of tourism in the country.

The **number of videos and drone footage** showcasing Kyrgyzstan has increased significantly, effectively promoting the country as an “undiscovered destination” and attracting millions of views.

The number of **travel bloggers**, both local and international, has also grown. They present the country in vivid detail, sparking greater interest in visiting Kyrgyzstan.

The next factor is **innovation and technological advancement**. This involves the implementation of modern technologies—such as online booking platforms, mobile applications, and virtual tours—to enhance the tourist experience and significantly improve customer satisfaction.

Kyrgyzstan has recently made substantial progress in this area. Online booking platforms like **Booking.com, Airbnb, and TripAdvisor** are now widely used, alongside local aggregators such as **Kyrgyzstan Travel** and **YourYurt**.

The introduction of **cashless payment systems** in hotels and cafés, through local platforms such as **Elsom** and **Megapay**, has significantly improved customer loyalty. Additionally, promotion via YouTube channels featuring virtual tours and travel series has greatly increased the country's international recognition.

Another important factor is **sustainability and environmental responsibility**, which involves the implementation of eco-friendly practices and the support of sustainable development—an increasingly important consideration for modern tourists.

Kyrgyzstan still has work to do in this area. Some initiatives are underway, such as **waste sorting programs and the cleaning of popular tourist trails**. However, environmental pollution remains a significant challenge for the country, and it is essential to develop effective strategies to protect Kyrgyzstan's natural resources and preserve its environment.

Among the positive developments, the **implementation of solar energy in campsites** stands out. This has a beneficial impact on the environment, as renewable energy—specifically solar power—is used to generate electricity.

The **final, yet crucial factor** is the presence of **well-trained and professional personnel**. Staff play a key role in tourism, as they shape visitors' impressions of the country. They can either enhance or diminish the overall tourist experience.

In summary, based on the factors discussed above, **Kyrgyzstan undoubtedly possesses significant tourism potential**, which is rooted in its natural beauty, cultural heritage, and emerging modern infrastructure. The country has made confident strides in digitalization and marketing; however, greater attention is needed in areas such as sustainability, service quality, and professional development in the sector.

Finally, it is important to assess the **impact of changing consumer preferences** on the development of the tourism industry. Current global trends indicate that

demographic shifts, the proliferation of new technologies, and increased attention to environmental issues are driving substantial changes in tourism. These changes are leading to the emergence of new methods of promotion and innovative approaches to organizing travel experiences.

According to the international consulting firm Deloitte in its report “*The Future of Travel*”, the needs of younger, well-informed, and increasingly conscious generations are gradually becoming more significant than those of the baby boomer generation.

Despite the rapid development of artificial intelligence and other revolutionary technologies—capable of fundamentally transforming and significantly enhancing the quality of travel—tourism companies will need to eliminate outdated technologies that in the past often hindered innovation.

There is also growing concern about the increase in extreme natural events caused by climate change, which are expected to have an increasing impact on the tourism industry. Companies providing travel services must respond not only to changing consumer priorities but also to regulatory pressures and the attractiveness of certain destinations.

To address these challenges, tourism company leaders will likely need to chart new strategies and restructure their businesses to meet evolving consumer demands.

“Travel is currently entering a transitional period. Baby boomers remain an attractive demographic group today; however, this generation is aging rapidly, which will gradually shift the focus toward younger generations, particularly Generation Z and millennials.”

It is noteworthy that 42% of Generation Z travelers and approximately 25% of millennials used TikTok to plan trips, compared to only 7% of Generation X and older travelers, according to Deloitte’s 2023 Holiday Travel Survey. The undeniable rise in the popularity of social video, combined with wider access to AI tools, is likely to drive significant changes in travel inspiration and purchase behavior over the next few years. Travel service providers can expect the emergence of models that integrate social video with AI-generated content to influence travel planning and decision-making.

Moreover, **Generation Z and millennials** increasingly associate their brand loyalty and purchasing decisions with values, particularly products and services that are environmentally sustainable. It has also become important how companies treat their

employees: if a beloved brand treats its staff poorly, this can lead to boycotts. These value-driven priorities of Generation Z and millennials are likely to play an important role in shaping marketing and promotional strategies within the travel industry.

It is also worth noting that younger generations tend to **value experiences more than older generations**. Airlines, for example, can respond by offering enhanced premium services and a broader range of products. This may include dedicated seating arrangements for families on budget carriers so that they can sit together, or expanded premium offerings by traditional airlines. Leading airlines are likely to adopt these strategies to increase both incremental and higher-margin revenue.

At the global level, the tourism industry is undergoing a **profound transformation** due to shifts in consumer preferences. Modern travelers—primarily Generation Z and millennials—are creating entirely new demands that require a reevaluation of traditional approaches to tourism. Key trends include:

- The growing importance of **experiences and personalized travel**,
- A strong emphasis on **environmental sustainability and social responsibility** of brands,
- Active use of **digital platforms**, particularly **TikTok** and **AI**, for travel planning,
- A preference for **slow, wellness-oriented, and sustainable forms of tourism**.

Particular attention is being paid to technological changes. The growing role of artificial intelligence and visual content is fundamentally transforming the way travelers search for and book trips. Companies that continue to rely on outdated methods risk losing their competitiveness. Additionally, the increasing frequency of natural disasters caused by climate change directly affects destination choices and travel safety.

The **shift in focus from baby boomers to younger generations** requires a reassessment of marketing strategies and product offerings. Considering the values of the new generation—**environmental sustainability, employee care, and social responsibility**—tourism companies must not only sell tours but also **communicate values** that resonate with young travelers and with which they are willing to identify.

In conclusion, the tourism industry in Kyrgyzstan possesses **significant potential**, thanks to its unique natural landscapes, rich cultural heritage, and emerging modern infrastructure. However, to fully realize this potential, a **creative and strategic approach** is necessary. This approach should include the **training of qualified personnel**,

consistent improvements in service quality, and a commitment to **sustainable development**.

It should be noted that global changes in consumer preferences—specifically the shift toward Generation Z and millennials, the increasing importance of digital technologies, environmental consciousness, and personalized experiences—demand flexibility and rapid adaptation from tourism companies. In this environment of digitalization, climate change, and rising traveler expectations, **success in the tourism industry will be achieved only by those companies that can not only offer high-quality products but also communicate values that resonate with the new generation of travelers.**

REFERENCES

1. «The manifestation of synergy in management and social sciences, and methods for measuring it» South Florida Journal of Environmental and Animal Science, ISSN 2769-3252, v.5, n.2, of 2025.
2. Temirov Nazar Zhakshylykovich, Alybaev Japar Buzurmankulovich, Rakhmatova Mavliuda Ubaydulaevna. <https://doi.org/10.53499/sfjeasv5n2-001>
3. Integration of Creative Business in Central Asia: Regional Development Strategies and Cross-Border Cooperation.
4. M. Okada, D. Alybaev, G. D. Alybaeva, A. T. Abdekirov, R. U. Rahmatova <https://ssdl.online/images/conf/2025/smartgreens2025/113.pdf>
5. Comparative analysis of the cherry industry in Kyrgyzstan and Chile and market development strategies in China
6. Zhou Miao Long, Dzhapar Alybaev, Guanying Xu, Haohe Yuan <https://doi.org/10.48077/scihor4.2025.84>
7. Yusupov I.Kh. Geography of Tourism in Kyrgyzstan. – Bishkek: Turar, 2020. – 104 p. <https://stat.gov.kg/>
8. Statistical data on Gross Value Added – for 2020–2024. // Statistical bulletin. – B.: National Statistical Committee of the Kyrgyz Republic.
9. Ponomarev A.V. Tourism Infrastructure. – Moscow: Yurayt, 2017. – 120 p.
10. Shportko V.I. State Regulation of Tourism. – Moscow: Unity-Dana, 2019. – 102 p.
11. Regional Features of Tourism in Central Asia. – Dushanbe: Irfon, 2018. – 101 p.

12. World Travel & Tourism Council. Economic Impact Reports 2023. [Electronic resource] – Access mode: <https://wttc.org>

Authors' Contribution

All authors contributed equally to the development of this article.

Data availability

All datasets relevant to this study's findings are fully available within the article.

How to cite this article (APA)

Alybaev, D., Satybaldievna, B. N., Ubaydulaevna, R. M., Koichumanovich, U. E., & Iskakovich, I. I. (2026). STRATEGIC OPPORTUNITIES FOR THE DEVELOPMENT OF THE TOURISM AND RECREATION SECTOR OF THE KYRGYZ REPUBLIC. *Veredas Do Direito*, 23, e235323. <https://doi.org/10.18623/rvd.v23.5323>