

Exploring the Post-COVID-19 Wellness Tourism Potential in Central Asia: A Case of Almaty Region, Kazakhstan

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Abstract. This study examines the Almaty Region in southeast Kazakhstan as a potential wellness tourism destination and a regional hub for Central Asia. It primarily focuses on the perspectives of private-sector stakeholders, including entrepreneurs, owners, and administrators of wellness centers, while also exploring the demand for wellness tourism products (WTP) in the post-COVID-19 context. Additionally, the study highlights the region's natural wellness resources and their contribution to improving local quality of life, in line with Kazakhstan's Strategy 2030. Data were collected through fieldwork, employing semi-structured face-to-face interviews and participant observation as the main methods. Over two months (March–April 2024), twelve in-depth interviews were conducted in Kazakh and Russian at wellness tourism centers catering to both domestic and international tourists. Observations were made at more than 30 centers near the hot springs of Sharyn village in the Almaty Region. The findings indicate a growing interest in wellness services, positioning the Almaty Region as an emerging hub for wellness tourism in Central Asia. These results offer valuable insights for policymakers, investors, and tourism professionals aiming to develop wellness tourism in the area.

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1. Introduction

The global wellness tourism sector has seen significant growth, driven by an increasing consumer focus on health, well-being, and nature-based experiences (Talukder et al., 2025; Bhuyan et al., 2025; Putrevu et al., 2025). Valued at USD 814.6 billion in 2022, the market is expected to expand considerably, with a compound annual growth rate (CAGR) of 12.42% from 2023 to 2030 (Global Wellness Institute, 2023). This growth is particularly evident in post-pandemic travel, as travelers increasingly prioritize restorative and health-oriented destinations (Jasrotia & Kour, 2023). The rising demand for wellness tourism products aligns with a broader focus on quality of life, as individuals seek physical, mental, and emotional rejuvenation through nature in peaceful environments (Ilies et al., 2017; Shyngysbaeva et al., 2023; Biagi et al., 2020). In response to this trend, the Kazakhstan Strategy 2030 aims to enhance the nation's quality of life by proactively developing luxury tourism offerings to attract both domestic and international visitors (Utegenova, 2011).

Kazakhstan (Figure 1), with its diverse natural landscapes and rich cultural heritage, is positioning itself as an emerging wellness tourism destination (Shyngysbaeva et al., 2023). The Almaty region, which includes the city of Almaty and its surrounding areas, offers a unique blend of mountainous

terrain, hot springs, and cultural attractions, making it increasingly appealing to wellness tourists seeking tranquility and rejuvenation (Iskakova et al., 2021). Almaty, historically significant as a Silk Road hub (Pakina & Batkalova, 2018) and currently the largest city in Kazakhstan, contributes 20% of the national GDP and benefits from its proximity to the Trans-Ili Alatau mountains, which provide accessible nature-based wellness experiences.

In line with Kazakhstan's "Kazakhstan-2030" development strategy, which emphasizes improved quality of life and economic diversification, this research explores how the Almaty region's natural wellness resources can be utilized by the private sector to create businesses and generate local employment in the post-COVID-19 era. This objective is particularly relevant given the heightened post-pandemic demand for health-oriented travel and the government's commitment to tourism development, as detailed in the Tourism Development Concept for 2023–2029 (Kazakhstan Government, 2021). The paper begins with a review of wellness tourism product concepts and the potential of the Almaty region, followed by an overview of the study area and methodology, a presentation and summary of results, and concludes with key findings.

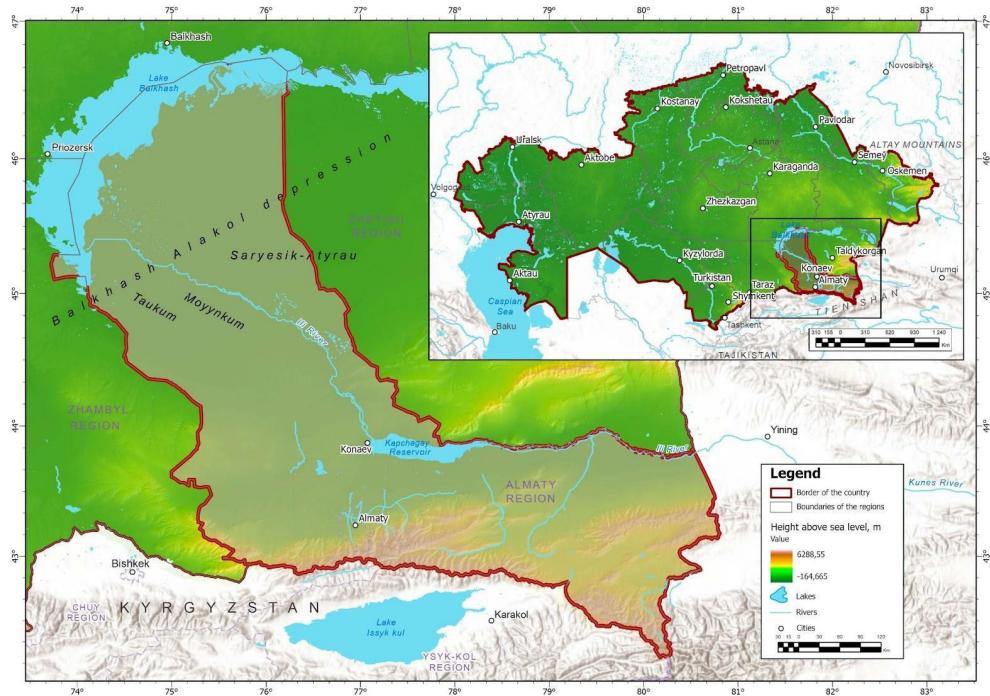


Figure 1. Geographic location of the Almaty Region in Kazakhstan.

Source: Map created by the authors.

Wellness tourism Product (WTP)

Wellness tourism has seen significant advancements since the COVID-19 pandemic, which has heightened awareness of travel intentions, behaviors, and the growing demand for wellness-oriented experiences (Seyfi et al., 2024). This shift has also brought a renewed focus on environmental awareness and the connection between wellness tourism and sustainable practices (Loh et al., 2021; Tiwari & Hashmi, 2022). The 12th World Congress on Snow, Mountain, and Wellness Tourism highlighted key challenges such as climate change and shifting consumer preferences, while also underlining the potential role of tourism in protecting fragile ecosystems (UN Tourism, 2024). There is a global increase in consciousness regarding the fragility of natural resources and the imperative for their preservation (Hart & Halden, 2020). Following the pandemic, public appreciation for wellness tourism has surged, with health-centered vacations becoming increasingly popular as travelers seek to improve their physical and mental well-being (Roman et al., 2022). This rising demand indicates a deeper understanding of the importance of promoting overall well-being through travel (Puttaiah et al., 2020; Tiwari & Hashmi, 2022).

The concept of wellness tourism has ancient roots, emerging from cultures where health and well-being were integral to civilization (Tiwari & Hashmi, 2022; Austin, 2020). Over time, the term “wellness” has evolved to encompass a holistic state of well-being that includes mental, emotional, and spiritual health alongside physical wellness (Ciziceno, 2022). At its core, wellness emphasizes achieving balance and harmony within oneself and with one’s environment, particularly at wellness destinations (Nicolaides & Grobler, 2017). It encourages proactive measures such as healthy lifestyle choices, stress management, and the cultivation of supportive relationships to enhance overall life satisfaction (Koskinen, 2020). According to Lamb et al. (2022), wellness is a personal journey that differs for each individual; some may turn to yoga or meditation, while others find restoration

in nature. The connection between well-being and nature is profound, as natural environments uniquely enhance overall health and vitality (Lyulicheva et al., 2023). Furthermore, the relationship between wellness and tourism is becoming increasingly significant as the wellness tourism sector expands rapidly (Singh et al., 2022). The rapidly growing wellness tourism sector offers individuals a chance to escape daily stressors, providing retreats for relaxation, rejuvenation, and introspection (Yin et al., 2020). Activities such as yoga on tranquil beaches, spa treatments at luxurious resorts, and the serene experience of natural hot springs enable wellness tourists to restore balance in their lives (Myllylä, 2024). The travel and tourism industry has played a crucial role in this transformation, attracting wellness tourists to destinations designed to provide enriching experiences that promote health, relaxation, and overall well-being (Luo et al., 2018).

Wellness tourism not only fosters sustainable practices but also significantly benefits local economies (Buzinde, 2020). Destinations focused on wellness increasingly prioritize services such as organic dining, eco-friendly accommodations, and activities that benefit both visitors and the local community (Kessler, 2022; Menegaki et al., 2019). This mutually beneficial relationship enhances the overall experience, allowing travelers to support local businesses while engaging in environmentally conscious behaviors (Kelly, 2012). In the context of urbanization and industrialization that define densely populated cities, particularly in the post-COVID-19 landscape, there is a growing demand for wellness tourism services (Roy et al., 2022), as individuals seek refuge from the adverse effects of urban life and prioritize their health (Ivbijaro et al., 2020). In several Asian countries, particularly in Central Asia, rapid industrial development and urbanization following the collapse of the Soviet Union have created numerous challenges, including pollution, traffic congestion, and elevated noise levels (Marples, 2016; Artman, 2022). These issues contribute to a diminished quality of life and discomfort for urban residents, who are affected by high

population density, noise pollution, and nearby industrial facilities (Lercher, 2019). In response to these challenges, wellness tourism in the Almaty region has experienced notable growth, as the area's natural resources, such as mineral springs and mud baths, provide a retreat for wellness-focused travelers (Aliyeva et al., 2020; Laituri et al., 2022).

The Almaty region's strategic location and natural resources position it as a leading destination for wellness tourism in Central Asia (Ableeva & Aktymbayeva, 2020). Local investors are increasingly funding advanced wellness centers, recognizing the region's potential to satisfy the rising demand for wellness tourism (Aliyeva et al., 2020). A significant portion of wellness tourists in the region comprises domestic travelers from urban centers like Almaty. Additionally, international tourists from countries such as India and China are increasingly drawn to the area, attracted by its natural beauty and wellness offerings. Historically, wellness tourists from Central Asia have favored destinations in Turkey and Thailand; however, the emergence of wellness centers in Almaty has prompted travelers to choose closer, more accessible locations that leverage the region's natural resources and serene environments. The rising interest in wellness tourism in the Almaty region can be linked to the environmental challenges faced by urban residents in Central Asia. Issues like pollution and overcrowding in cities have sparked a greater interest in wellness tourism products that offer proximity to nature and outdoor activities (Aliyeva et al., 2020). Despite this growing popularity, wellness centers in the Almaty region often do not meet global standards and primarily cater to domestic tourists, which limits their ability to attract international visitors. There is a substantial opportunity for these centers to enhance their appeal by diversifying their offerings and improving service quality to align with global expectations.

Almaty's geographical location, sharing borders with neighboring countries such as China, Kyrgyzstan, Uzbekistan, and Tajikistan, has also bolstered its appeal as a wellness tourism destination. The proximity to these countries, combined with cultural and linguistic similarities and visa-free travel arrangements, has facilitated cross-border wellness tourism. The profile of wellness tourists in the Almaty region indicates that the majority are women aged 35 to 60, who possess higher education, leisure time, and disposable income. These tourists prioritize health and wellness, motivated by a desire to unwind, manage stress, and explore new destinations for personal growth (Aliyeva et al., 2020).

Wellness Tourism Before and After COVID-19

Before the COVID-19 pandemic, wellness tourism in Almaty was underdeveloped, primarily serving older local tourists and a small number of foreign visitors seeking medical treatments, thermal springs, and rehabilitation services. The region's wellness infrastructure was outdated, and marketing efforts were minimal, making it less appealing to younger demographics and international travelers. In contrast to well-established global wellness hubs that offer yoga retreats, holistic therapies, and luxury spa treatments, Almaty focused mainly on medical recovery rather than promoting proactive well-being. The COVID-19 pandemic significantly changed consumer behavior, increasing awareness of health and wellness and altering travel preferences. Wellness tourism in Almaty diversified, attracting younger professionals, middle-aged tourists, and international visitors. In response, resorts and wellness centers began offering new packages, including

nature-based retreats, yoga programs, and mindfulness sessions. Digital marketing and the global rise of wellness trends played a crucial role in transforming Almaty into a more attractive wellness destination.

This shift underscores the necessity for ongoing investment in service diversification and quality improvements to position Almaty as a competitive wellness tourism hub. The rise of wellness travel as a notable segment in the global travel landscape has been highlighted by the profound effects of the COVID-19 pandemic (Dar & Kashyap, 2022; Prideaux et al., 2020). This shift reflects the increasing importance of wellness among consumers, resulting in a broader range of wellness tourism offerings. As consumer preferences evolve, there is a growing demand for wellness tourism products that emphasize both physical and mental health, aligning with the global trend toward preventive and holistic well-being (Qiu, 2021). The focus on wellness tourism has prompted the sector to address emerging mental health needs, fostering the growth of high-quality, health-oriented travel experiences.

Study Area

The Almaty Region, established in 1932, is located in southeastern Kazakhstan and spans approximately 105,100 square kilometers. It shares borders with China to the east, the Kyrgyz Republic to the south, the Zhetysu Region to the northeast, Lake Balkhash to the northwest, and the Zhambyl Region to the west. As of January 1, 2025, the region's population is estimated at 1.56 million, representing over 100 ethnic groups. The administrative center is the city of Qonaev, which, along with two cities of regional significance (Qonaev and Alatau), encompasses nine districts and a total of 373 settlements (Akimat of Almaty Region, 2024). The region's geography is marked by significant ecological diversity, ranging from arid steppes to alpine meadows, and features a sharply continental climate that includes five climatic zones, from desert to glaciated areas. This environmental variety supports a wide range of flora and fauna, including species listed in Kazakhstan's national Red Book. The Almaty Region is rich in mineral resources, hosting deposits of non-ferrous and precious metals, ornamental stones, thermal springs, and mineral-rich waters. It also boasts extensive surface water resources, including major rivers and lakes such as the Ili River, Lake Balkhash, and the Kapshagay Reservoir (Aliyeva et al., 2020).

Economically, the Almaty Region functions as a dynamic agro-industrial hub, benefiting from fertile agricultural land and proximity to regional trade corridors. It ranks among the country's leaders in the production of fruits, vegetables, meat, dairy products, and tobacco. Between 2015 and 2024, the region saw substantial socio-economic development, with the gross regional product increasing 2.9-fold and industrial output quadrupling. Investments in infrastructure, housing, and small and medium-sized enterprises also grew significantly, underscoring the region's importance in national development strategies. In recent years, the region has emerged as an attractive destination for wellness tourism, driven by its abundance of natural healing resources and a growing emphasis on preventive healthcare (Aliyeva et al., 2020). The Almaty Region (Figure 2), is home to over 200 thermal springs, therapeutic mud deposits, and a network of sanatoriums and wellness centers that support the expanding balneotherapy industry (Figure 3,4). These facilities provide treatments for various conditions, including gastrointestinal,

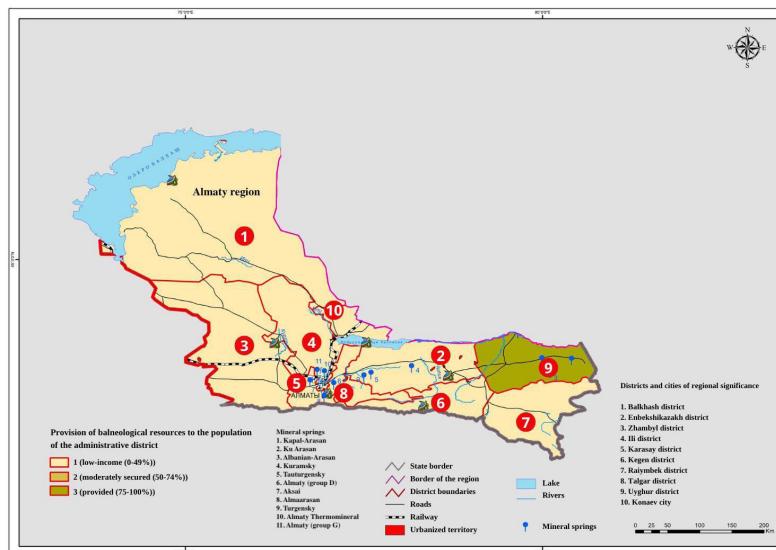


Figure 2. Spatial distribution of thermal springs within the Almaty Region.
Source: Map created by the author.



Figure 3. *Eco-Park Wellness Center, Almaty Region.* Source: Photo taken by the author.



Figure 4. *Four Season Wellness Center, Almaty Region.* Source: Photo taken by the author.

Table 1. Breakdown of Interviewees with stakeholders of wellness center

Interviewee Category	Number of semi-structured interview
Investors and entrepreneurs	5
General Manager	4
Professional Employees	3
Total	12

dermatological, and renal issues, attracting both domestic and international tourists seeking physical and emotional rejuvenation. Historically, local populations have informally utilized thermal waters based on indigenous knowledge passed down through generations (Aliyeva et al., 2020). Today, wellness tourism providers are combining this traditional knowledge with modern standards to develop innovative wellness products. Many newer wellness centers, established in the past 2–3 years, adhere to high international service standards and primarily cater to families, particularly women with children. These centers operate year-round, with peak occupancy during weekends and holiday periods, especially from September to May.

2. Methods

This study employed fieldwork as its primary methodological approach, utilizing semi-structured face-to-face interviews to gather essential information from entrepreneurs, owners, and administrators of wellness tourism centres in the Almaty Region. Additionally, participant observations were conducted during visits to over 30 wellness tourism centres near the hot springs of Sharyn village, allowing for empirical data collection. Interviews, conducted in Kazakh and Russian, lasted between 60 to 90 minutes and were carried out over a two-month period from March to April 2024. The main researcher, fluent in both languages, assured interviewees of their anonymity, which contributed to the success of the interviews. The research included twelve interviews with wellness tourism centres catering to both domestic and international tourists in the Almaty region (Table 1). All interviews were recorded and subsequently transcribed. Hard copies of the transcripts were organized and managed using Microsoft Word, with codes and coding decisions documented during the analysis process. The analysis adhered to Charmaz's (2006) three stages of grounded theory coding: initial coding, focused coding, and theoretical coding. In the initial coding stage, data was analyzed line by line to ensure a comprehensive understanding and to avoid overlooking valuable information. Focused coding involved identifying codes that best captured the meanings expressed by the wellness tourism centres and were most relevant for developing potential categories.

The theoretical framework for analyzing the interview data was based on grounded theory, which was deemed suitable for this study. Additionally, visual data in the form of photographs were collected throughout all stages of fieldwork. The findings from this research offer valuable insights into the role of wellness centres in the Almaty region, particularly regarding job creation and the attraction of both domestic and international tourists interested in wellness tourism products.

3. Results and Discussion

The findings are structured around two main themes: 1) The active involvement of the private sector as a key stakeholder

has facilitated the exploration of the wellness tourism potential in the Almaty region. 2) In the aftermath of COVID-19, wellness tourism has emerged as a crucial product, drawing both domestic and international tourists to the Almaty region.

Theme 1. Private Sector Initiatives for Wellness Tourism in the Almaty Region

The proactive involvement of the private sector has significantly advanced the exploration and development of wellness tourism in the Almaty region. Qualitative analysis and detailed interviews indicate that wellness tourism enterprises in this area are primarily privately owned, operating independently and continuously throughout the year. One investor articulated the importance of private initiatives

“The resources for wellness tourism development and creating job opportunities in Almaty region are vast. We are very satisfied with our investment in this sector because it's new, and the demand for these services grows daily. We need our government to promote our wellness tourism products internationally to attract more tourists.”

This perspective aligns with broader literature that positions the private sector as crucial to the growth of wellness tourism, highlighting its roles in investment, innovation, and marketing (Smith & Puczko, 2014). The contributions of private stakeholders, as noted by Voigt and Pforr (2014), are essential for establishing competitive wellness tourism destinations that meet international quality standards and cater to diverse tourist segments. Private investments have played a vital role in improving infrastructure, enhancing service quality, and creating an inviting environment for a varied visitor base. Another investor reinforced this viewpoint:

“The advantages of wellness tourism centers are their stability throughout the seasons. We are a year-round wellness tourism center, so there is demand from both local and international tourists in every season, and this demand is growing daily.”

Kazakov and Oyner (2021) support this view, advocating for continuous private sector investments in wellness infrastructure to maintain competitiveness and attractiveness. Innovative wellness services introduced by private enterprises, such as traditional healing practices, holistic wellness programs, and luxury spa experiences, have significantly contributed to meeting consumer demands for diverse wellness experiences (GWI, 2021). Effective marketing strategies employed by private entities have been crucial in promoting Almaty as a wellness tourism destination. Interview participants consistently highlighted strategic partnerships and international collaborations as vital for enhancing the region's profile and reputation. Supporting this, Kim et al. (2017) illustrate the critical role strategic marketing plays in establishing successful wellness tourism destinations globally

by boosting visibility and appeal. Despite these private sector successes, interviews also revealed significant challenges, particularly regarding limited governmental support and standardization. One respondent noted:

“Each wellness tourism center is a private enterprise, and the government lacks standardization to help us improve and update our services. Therefore, we as investors must continuously seek to enhance our offerings based on customer feedback.”

This gap underscores the need for collaborative governance frameworks, consistent with stakeholder theory, which posits that involving multiple stakeholders, including government entities, leads to more effective and sustainable tourism development (Freeman, 2010; Jamal & Stronza, 2008). The research also identified critical gaps in understanding and implementing sustainable tourism principles among wellness tourism centers. Interviews consistently revealed limited knowledge of sustainability, highlighting an urgent need for structured capacity-building and educational programs. Sheikhi (2019) argue that sustainable tourism initiatives often struggle without clear governmental policies or incentives, suggesting the need for formalized guidelines and certification systems to enhance the sustainability and competitiveness of wellness tourism ventures (Kazakov & Oyner, 2021). Further exploration through interviews highlighted the necessity for increased community engagement and local stakeholder integration to ensure sustainability. Investors expressed a desire for more robust collaboration with local communities and businesses, emphasizing the mutual benefits of fostering strong local connections. Literature recognizes that such local integration is essential for enhancing authenticity, cultural sustainability, and the long-term success of tourism projects (Timothy & Tosun, 2003).

Theme 2. Post-COVID-19 Opportunities for Wellness Tourism in the Almaty Region

The COVID-19 pandemic has significantly reshaped global tourism trends, placing wellness tourism at the forefront of post-pandemic recovery strategies. Interviews indicate a notable increase in demand for wellness tourism, largely driven by travelers' heightened awareness of health and wellness. One investor succinctly remarked:

“After COVID-19, demand for wellness tourism services increased, and we faced challenges in meeting this growing demand. We have tried to increase our staff and capacity.”

This perspective aligns with findings from the Global Wellness Institute (GWI, 2021), which reveal a shift towards wellness-focused travel as travelers increasingly prioritize their health and well-being. The pandemic also catalyzed significant growth in domestic tourism due to international travel restrictions. Many interviewees noted that the influx of domestic visitors positively impacted local wellness centers. One investor shared:

“We were very disappointed by COVID-19, losing professional employees and receiving little support from authorities. However, post-COVID-19 looks bright for us; we are working hard to meet demand, though we regret our capacity is insufficient.”

This sentiment mirrors global analyses by Hall et al. (2020) and Kim et al. (2017), which emphasize the increased reliance on domestic markets as a resilient strategy for tourism businesses during times of international disruption, suggesting potential long-term changes in travel behavior. As international travel resumes, Almaty is witnessing renewed interest from international tourists attracted to its wellness offerings. Wellness tourism businesses have quickly adapted by implementing rigorous health and safety protocols and diversifying their services to align with evolving consumer preferences. Gössling et al. (2020) assert that such global adaptive strategies are essential for maintaining consumer confidence and ensuring business continuity during post-pandemic recovery. Additionally, respondents expressed interest in leveraging digital technologies to enhance service offerings and improve customer engagement. Innovations such as online booking platforms, virtual wellness experiences, and personalized digital wellness programs are emerging as vital tools for the post-pandemic recovery of wellness tourism (Xiang & Gretzel, 2010). Despite significant growth, wellness tourism operators were largely unprepared for the rapid influx of visitors post-pandemic. Many entered the sector without sufficient professional expertise or formal training, relying heavily on consumer feedback and international benchmarks. As one investor candidly noted:

“Indeed, most of us (investors) are involved in this sector by accident, without prior professional experience, and we are learning from other destinations to develop our centers to international standards.”

The development of wellness centers in the Almaty region is currently in the exploratory phase, primarily driven by investors, government authorities, and some local community members. To promote a sustainable and regenerative approach, it is essential to engage a broader range of stakeholders, including tourism operators, environmental organizations, healthcare professionals, and local businesses. A collaborative framework is needed to align economic interests with social and environmental priorities, creating a balanced development model that benefits all parties. By involving diverse stakeholders in strategic planning, decision-making, and implementation, the wellness sector can improve local well-being, stimulate economic growth, and support environmental preservation, ensuring long-term success and satisfaction for everyone involved. Smith and Puczko (2014) highlight the urgent need for structured professional training and established operational standards to ensure sustained service quality, advocating for formal educational initiatives and standardized certifications to support sector development. In conclusion, while private sector initiatives have been crucial in the growth of wellness tourism in Almaty, achieving long-term sustainable development requires more structured collaboration and governance frameworks to effectively address existing gaps.

4. Conclusion

This study explores the growth of wellness tourism, which emphasizes physical, mental, and emotional well-being through self-responsibility and holistic treatments. In contrast to traditional tourism, wellness tourism focuses on non-insured services, including fitness, beauty treatments, relaxation, and stress management. Individuals are motivated by a desire for improved health, disease prevention, and greater

self-awareness. The Almaty region, with its natural resources, favorable climate, and plentiful mineral springs, has the potential to become a leading wellness tourism destination in Central Asia. However, challenges such as limited marketing, inadequate infrastructure, and a shortage of qualified labor must be addressed to fully capitalize on this opportunity. The findings suggest that Kazakhstan's Almaty region could lead in wellness tourism by integrating traditional healing methods, ecotourism, and modern healthcare services. The study emphasizes the need for a proactive, long-term strategy to overcome these challenges, positioning the region as a prime destination for wellness-focused travelers. Successful initiatives, such as sanatoriums offering both modern and traditional treatments and ecotourism projects focused on nature immersion, provide a strong foundation for this development.

To promote the growth of wellness tourism in the Almaty region, several key recommendations are put forward. First, collaboration between the government and investors is essential to establish policies and financial incentives that encourage responsible wellness tourism development, such as tax benefits, grants, and subsidies. Additionally, local communities should be actively engaged through job creation, training programs, and the integration of traditional healing practices and cultural experiences into wellness offerings, ensuring equitable sharing of economic benefits. Finally, investors and operators should prioritize sustainability by focusing on eco-friendly construction, renewable energy sources, and effective waste management systems. Establishing global sustainability certifications for wellness centers can further attract environmentally conscious travelers. Future research should investigate eco-friendly infrastructure, regenerative tourism practices, and policy frameworks that support sustainable growth in wellness tourism in Almaty. Examining the role of local communities in developing wellness tourism and its impact on livelihoods, cultural preservation, and social well-being will yield valuable insights. Additionally, analyzing tourist preferences, motivations, and emerging wellness trends can enhance service offerings and attract international wellness tourists to the region.

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