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THE CURRENT STATE OF THE KAZAKHSTAN TOURIST MARKET

Abstract. For many developed and developing countries, the tourism sector is the main source of employment, government revenue and foreign exchange earnings. The most important parameters of tourism development in the country are indicators of inbound and outbound tourism. Before the pandemic, both at the republican and regional levels, a lot of work was carried out to attract foreign tourists to Kazakhstan, measures were taken in the field of image policy and popularization of tourist destinations of the country. But many Kazakhstanis prefer to rest abroad, rather than in the resort areas of their homeland. The interrelation of the tourist attractiveness of the country with the category of tourist potential, factors of tourist attractiveness are considered. Tourist attractiveness is based on the tourism potential of the country, contributes to the growth of its competitiveness, the transformation of tourist supply into demand, is associated with various types of its assessment and is the result of its previous development. republic. Tourism activity is influenced by many factors of an economic, political, social, natural and technical nature, including: terrorism, the process of ensuring the safety of tourists, man-made disasters; uneven distribution of tourist flows; political instability in some regions of the world; prolonged global recession; volatility of exchange rates; priority of national rather than international norms in tourism, etc. The negative factors hindering the development of inbound tourism in the country have been identified, recommendations for eliminating existing problems have been proposed. The considered resources and tourist opportunities of Kazakhstan lead to the expediency of forming a modern tourist product. The development of a new tourist product in Kazakhstan would be competitive in the world market of tourist services and would help attract foreign tourists to Kazakhstan. The ways of development of domestic tourism in Kazakhstan, the creation of a competitive tourism industry, including the development of infrastructure and improving the quality of services provided, are proposed.

Keywords: tourism, pandemic, economy, budget, visitors, visit objectives.

Introduction

The formation of the tourism industry based on the development of large-scale tourism business and the rational use of recreational potential is directly related to the implementation of the Strategy

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"Kazakhstan - 2050". 2017 was a turning point for the development of tourism in Kazakhstan. On behalf of the Head of State, the Committee of Industry and Tourism was formed, which is integrated into the Ministry of Culture and Sports. On May 31, 2019, the State Program for the development of the tourism industry of the Republic of Kazakhstan for 2019-2025 was approved."

The formulation of the problem

The industry faces a strategic task to increase the share of tourism in GDP to 8% by 2025. As well as an increase in employment in the industry to 660 thousand people by 2025. Growth is expected to be achieved due to three main drivers: investment in tourism, domestic and foreign tourists' expenses. In order to implement the strategic goal of the Program to achieve an 8% share of tourism in the GDP structure in 2025, the three above-mentioned drivers should have an average annual growth rate of 7-8%.

Economic growth, social and technological progress contribute to the development of globalization processes in tourism. They contribute to increasing the scale of business trips, raising public awareness of tourist routes, increasing demand for educational and recreational trips, facilitating border crossing procedures, etc. The peculiarity of the globalization process is that it includes almost all tourist farms around the world, resulting in increased interaction and interdependence of countries. This leads to the integration of not only individual enterprises, but also tourist and economic systems of various countries of the world [1].

Radical changes in the global hotel industry and restaurant business have become a consequence of changes in the field of accommodation services due to the development of innovative technologies for providing hotel and restaurant services, increasing the level of technical equipment of hotels and restaurants, the formation of large hotels and their chains – all this has led to the restructuring of the hotel and restaurant service industry into the modern hospitality industry [2].

The tourism industry contributes to the development of the entire infrastructure of society - economy, culture, social sphere, as well as communications. About 10% of the world's total product, 30% of world exports of services, 7% of world investments, 10% of jobs and 5% of all tax revenues are in the tourism sector. The costs that are aimed at promoting a tourist product are one of the main costs in the formation of tourism. Thus, according to the WTO, the costs of promoting and establishing a national tourist product on average account for about half of the budget of countries with developed tourist infrastructure. For example, Thailand spends about \$ 90 million annually on tourism development, Turkey more than \$ 100 million.

In tourism, as in any other sector of the economy, employment is a determining factor, on the one hand, as an essential condition for the production of public goods, on the other hand, as an essential condition for solving a number of social problems. Employment in the tourism industry is characterized by a number of features [3].

Experts have calculated that on average; in order to get an income equal to a visit to the country by one tourist, it is necessary to export about 10 tons of coal. At the same time, it should be noted that the export of raw materials from the Republic depletes non-renewable reserves, while the tourism sector does not require large raw material costs. This fact confirms the priority of tourism development as an industry.

Description of the main methods

To write the article, scientific publications, analytical works of foreign and domestic authors, including from the Internet, regulatory legal acts of authorities at various levels, state programs of the Republic of Kazakhstan were studied. The analysis was carried out on the basis of data from the Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of

Kazakhstan on the selected topic. The priorities of the development of the tourism industry in the economy of Kazakhstan are highlighted. The methods of analytical, comparative analysis and logical generalization are applied.

The results of the study

The most important parameters of tourism development in the country are indicators of inbound and outbound tourism. So, in 2019-2020, the number of visitors for outbound tourism amounted to more than 10.7 million people, and for inbound tourism - only 8.5 million people. In 2021, the number of visitors to outbound tourism decreased by about 4 times compared to 2020, and the reason for this is strict quarantine restrictions up to a complete lockdown (Table 1). Thus, we can understand that the demand for outbound tourism is still greater than for inbound tourism. Before the pandemic, both at the republican and regional levels, a lot of work was carried out to attract foreign tourists to Kazakhstan, measures were taken in the field of image policy and popularization of tourist destinations of the country.

Table 1 – Number of visitors by type of tourism

№	Indicators	2019 year	2020 year	2021 year
1	The number of visitors-residents of the Republic of Kazakhstan who have traveled abroad	10 646 241	10 707 270	2 865 004
2	The number of non-resident visitors who entered the Republic of Kazakhstan	8 789 314	8 514 989	2 034 753

Source: *www.stat.gov.kz* (with reference to the Border Service of the National Security Committee of the Republic of Kazakhstan).

According to the results of a sample survey of incoming visitors in October 2022 conducted by the Bureau of National Statistics, the majority of foreigners who came (40%) were Russians. 19% of the guests came from Uzbekistan, 19% from Kyrgyzstan, 8% from Turkey, 2% from Ukraine (Figure 1).

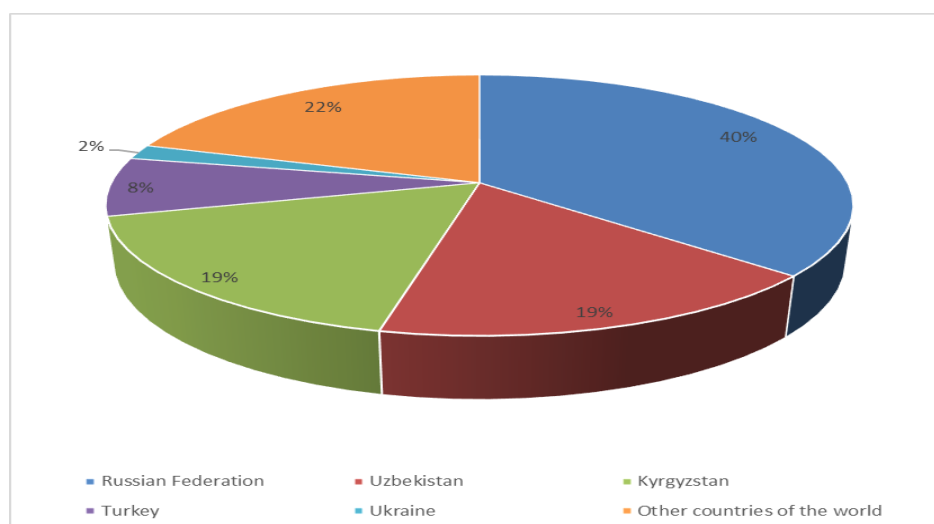


Figure 1 – Distribution of incoming visitors by country

Among the most frequently mentioned reasons for the visit are personal goals (79% of responses). The remaining 21% of visitors indicated that they came to Kazakhstan for business or

professional purposes. More than half of the foreigners surveyed (51%) reported that they stayed with relatives or acquaintances and did not pay rent, 23% of respondents lived in a hotel, 22% rented an apartment or a house.

The main activities of tourists were visiting attractions (31% of respondents reported this), family celebrations, weddings, birthdays (19%), cultural and sports events (11%) [4].

The number of incoming tourists in 2021 amounted to only 2034,753 people, which is 76% lower than in 2020. According to the analytical data obtained from state resources, Kazakhstan is popular among the CIS countries than among the Baltic states or Europe, which is not surprising, given its geographical location. Turkey and Germany became a striking exception, which are ahead of many European and even CIS countries in terms of tourists arriving in Kazakhstan.

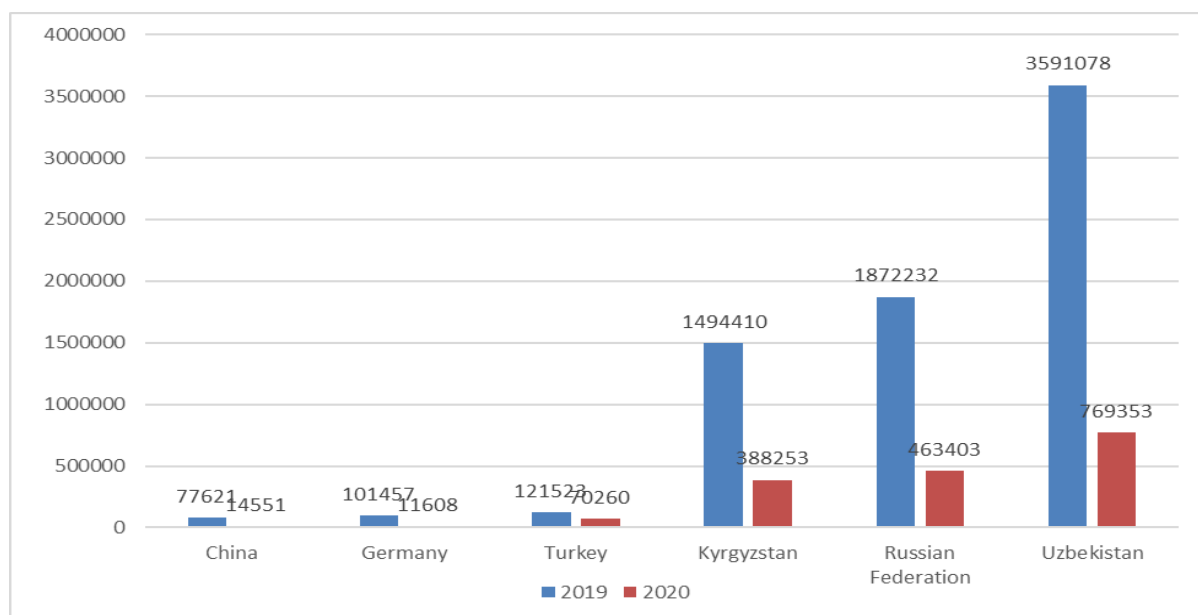


Figure 2 – Number of visitors by inbound tourism by country, people

The number of tourists leaving in 2021 amounted to only 2865,004 people, which is more than 73% lower than in 2020. Of these, 1062,133 people for business and professional travel purposes, 1802871 people for personal purposes, of which 124656 people for tourism, 1676274 people for private trips, 1941 people for transit [5].

According to the data, people most often leave Kazakhstan for Russia, Kyrgyzstan is the second most popular tourist destination, followed by Uzbekistan [6].

Why many Kazakhstanis prefer to rest abroad, and not in the resort areas of their homeland. When making such a decision, outbound tourists from Kazakhstan take into account, first of all, the high level of service that they are provided in other countries. One of the reasons to rest abroad is also called the more attractive cost of foreign travel trips [7].

Table 2 – The number of visitors for inbound and outbound tourism by goals for 2021

Purposes of travel	Inbound tourism	Outbound tourism
1	2	3
Total including:	2 034 753	2 865 004
business and professional	743 187	1 062 133
personal of them:	1 291 566	1 802 871

Continuation of the table-2

1	2	3
tourism	15 942	124 656
private	1 134 928	1 676 274
transit	140 696	1 941

Source: Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic

Tourism activity is influenced by many factors of an economic, political, social, natural and technical nature, including: terrorism, the process of ensuring the safety of tourists, man-made disasters; uneven distribution of tourist flows; political instability in some regions of the world; prolonged global recession; volatility of exchange rates; priority of national rather than international norms in tourism, etc. [8].

The tourism industry is one of those industries that was among the first to be hit by a new coronavirus infection. By the end of the first quarter of 2020, the COVID-19 pandemic abruptly halted international travel and had a significant impact on the tourism industry. In an unfavorable epidemiological situation, the development of the tourism business was under serious threat. According to experts, only in the first months of the pandemic, demand for all outbound destinations decreased by 20-25%, and after the closure of borders by many states, it fell to almost zero.

The impact of the pandemic, although it affected external tourism, had a positive impact on the growth of domestic tourism. Domestic tourism, which was predicted to rise during the pandemic, really became interesting to the average resident of the Republic of Kazakhstan. There was an increase in demand and supply for holidays in resorts within the country. Despite the pandemic year, positive dynamics in domestic tourism has been recorded, a lot of work has been done to attract private investment, etc. [9]. People from all over Kazakhstan went to Alakol, Bukhtarma, and Katon-Karagai, joining active tourism among others [9].

Table 3 – Number of visitors served by domestic tourism thousand people

	2019 year	2020 year	2021 year
Total of them	5 864,7	6 657,5	4 463,4
are places of accommodation	4 695,9	5 286,8	3 328,6
by sanatorium-resort organizations	296,9	312,1	218,9
with specially protected natural territories	871,9	1 058,6	915,9

Source: Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan.

In 2021, the number of visitors served for domestic tourism in Kazakhstan decreased by about 33% compared to the previous year, while for external tourism the decrease was 73%. The largest volume of decrease in the indicator is accounted for by the share of visitors served at the places of accommodation – 37%; those served by sanatorium-resort organizations – 30%; the number of visitors to specially protected natural areas – about 14%.

In 2021, the most visited region of Kazakhstan was Akmola region, which received about 12.5% of domestic tourists; Nur-Sultan city – about 11%; Almaty city – 9.6%; Almaty region – 8.9% and Aktobe city – 7.5% of the total number of domestic tourists (Figure 3).

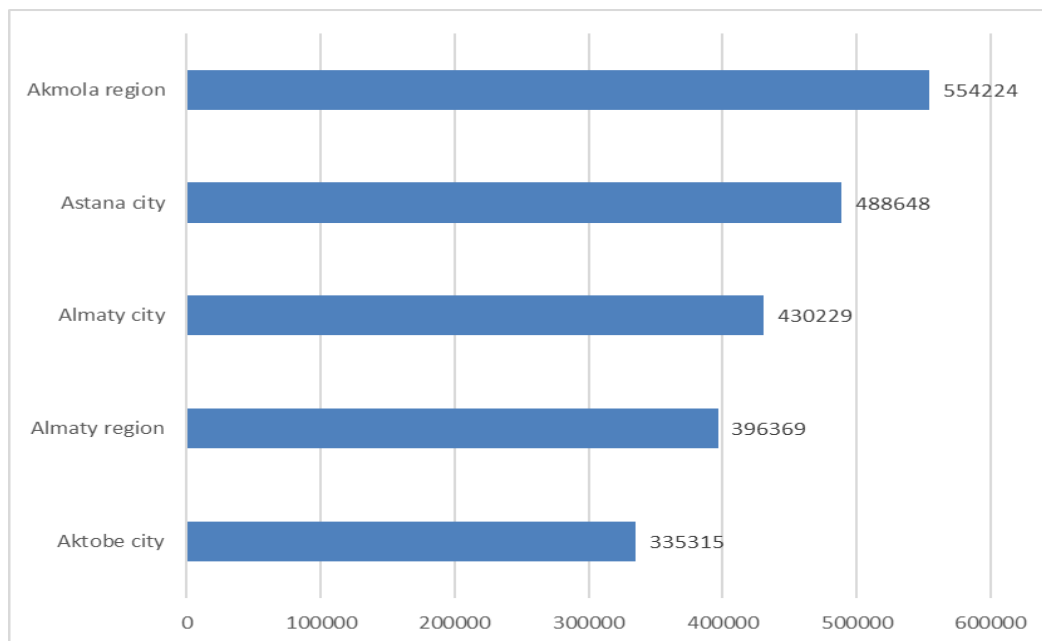


Figure 3 – The number of incoming and internal visitors served by region for 2021, people

The most visited resort area of Kazakhstan in the period under review, there was Shchuchye-Burabay, which received more than 11% of all domestic tourists vacationing in the resort areas; the Mangystau resort area – 9.7% and the Turkestan tourist district – 8.7% (Figure 4).

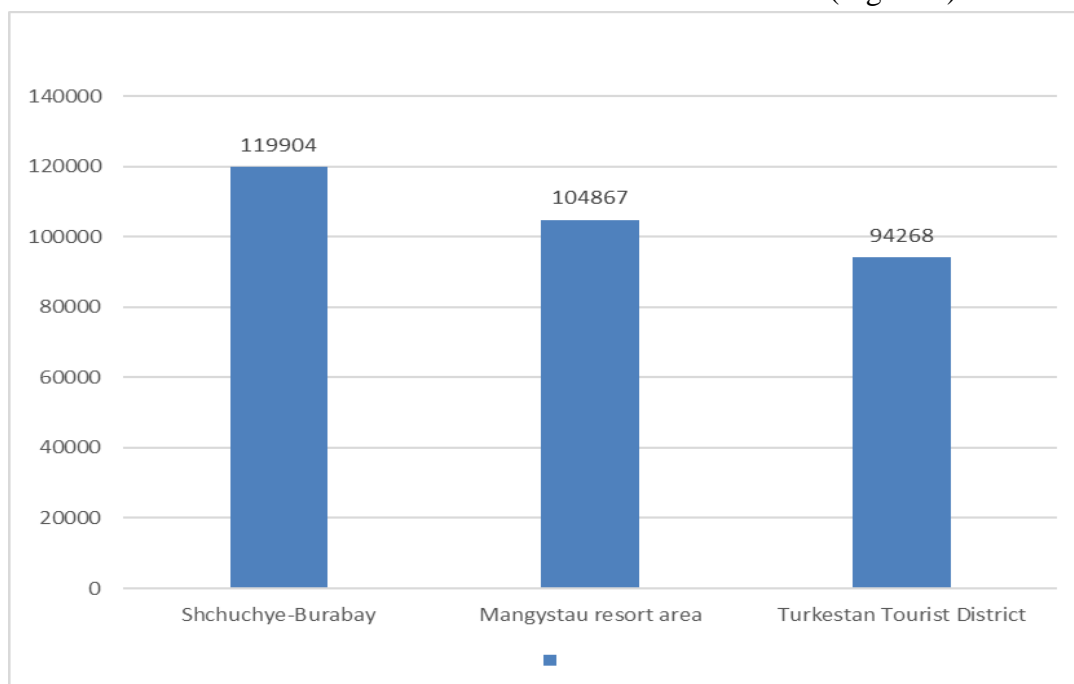


Figure 4 – Number of domestic tourists served by resort areas in 2021 people

The coronavirus pandemic in early 2021 had a great impact on the state and further development of almost all spheres of the world economy, including tourism. However, any crisis leads not only to negative consequences, but also to the active capture of new opportunities, overcoming the challenges of this serious test for the entire tourist market. Among these opportunities and

challenges are the acceleration of the digitalization of tourist services, the more active introduction of modern technologies (for example, big data, artificial intelligence, mixed and augmented reality, etc.), the use of ideas of the economy of impressions, the actualization of an individual approach to the client, as well as the environmental aspect of the tourist product, the expansion of the geography of tourist routes, etc. In addition, the importance of such a factor as travel safety (including the sanitary and epidemiological situation of the place of stay) is expected to increase. Tourists will prefer private tours in small groups at domestic resorts. It is obvious that after the pandemic, the perception of the world and the psychology of consumption in general should change greatly, in addition, a new stage of competition in tourism will begin, which will lead to a completely new distribution of resources in this market. [9].

Conclusions

For many developed and developing countries, the tourism sector is the main source of employment, government revenue and foreign exchange earnings. Despite the pandemic year, positive dynamics in the development of domestic tourism has been recorded in Kazakhstan. The objectives of the development of domestic tourism in Kazakhstan is to create a competitive tourism industry, including the development of infrastructure and improving the quality of services provided.

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ҚАЗАҚСТАНДЫҚ ТУРИСТІК НАРЫҚТЫҢ АҒЫМДАҒЫ ЖАҒДАЙЫ

Аңдатпа. Көптеген дамыған және дамушы елдер үшін туризм секторы жұмыспен қамтудың, мемлекеттік кірістердің және валюталық түсімдердің негізгі көзі болып табылады. Елдегі туризмді дамытудың маңызды параметрлері кіру және шығу туризмінің көрсеткіштері болып табылады. Пандемияға дейін республикалық және өңірлік деңгейлерде Қазақстанға шетелдік туристерді тарту бойынша үлкен жұмыс жүргізілді, Имидждік саясат және елдің туристік бағыттарын танымал ету саласында шаралар қабылданды. Бірақ көптеген қазақстандықтар өз Отанының курорттық аймақтарында емес, шетелде демалуды жөн көреді. Елдің туристік тартымдылығының туристік әлеует санатымен байланысы, туристік тартымдылық факторлары қарастырылады. Туристік тартымдылық елдің туристік әлеуетіне негізделеді, оның бәсекеге қабілеттілігінің өсуіне, туристік ұсыныстың сұранысқа айналуына ықпал етеді, оны бағалаудың әртүрлі

түрлерімен байланысты және оның бұрынғы дамуының нәтижесі болып табылады. республика. Туристік қызметке экономикалық, саяси, қоғамдық, табиғи және техникалық сипаттағы көптеген факторлар әсер етеді, оның ішінде: терроризм, туристердің қауіпсіздігін қамтамасыз ету процесі, техногендік апаттар; туристік ағындардың біркелкі бөлінбеуі; әлемнің кейбір аймақтарындағы саяси тұрақсыздық; ұзаққа созылған әлемдік рецессия; валюта бағамдарының құбылмалылығы; Халықаралық емес, Ұлттық нормалардың басымдығы. туризм және т. б. Елде келу туризмінің дамуына кедергі келтіретін жағымсыз факторлар анықталды, бар проблемаларды жою бойынша ұсыныстар ұсынылды. Қаралған ресурстар мен Қазақстанның туристік мүмкіндіктері заманауи туристік өнімді қалыптастырудың орындылығына алып келеді. Қазақстанда жаңа туристік өнімді әзірлеу әлемдік туристік қызметтер нарығында бәсекеге қабілетті болар еді және шетелдік туристерді Қазақстанға тартуға ықпал ететін еді. Қазақстанда ішкі туризмді дамыту, инфрақұрылымды дамытуды және көрсетілетін қызметтердің сапасын арттыруды қамтитын бәсекеге қабілетті туристік саланы құру жолдары ұсынылды.

Кілт сөздер: туризм, пандемия, экономика, бюджет, келушілер, сапар мақсаты.

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ТЕКУЩЕЕ СОСТОЯНИЕ КАЗАХСТАНСКОГО ТУРИСТСКОГО РЫНКА

Аннотация. Для многих развитых и развивающихся стран сектор туризма является основным источником занятости, государственных доходов и валютных поступлений. Важнейшими параметрами развития туризма в стране являются показатели въездного и выездного туризма. До пандемии как на республиканском, так и на региональном уровнях проводилась большая работа по привлечению иностранных туристов в Казахстан, принимались меры в области имиджевой политики и популяризации туристических направлений страны. Но многие казахстанцы предпочитают отдыхать за рубежом, а не в курортных зонах своей родины. Рассматриваются взаимосвязь туристской привлекательности страны с категорией туристского потенциала, факторы туристской привлекательности. Туристская привлекательность базируется на туристском потенциале страны, способствует росту ее конкурентоспособности, превращению туристского предложения в спрос, связана с различными видами его оценки и является результатом ее прежнего развития. республика. На туристскую деятельность оказывает влияние множество факторов экономического, политического, общественного, природного и технического характера, в числе которых: терроризм, процесс обеспечения безопасности туристов, техногенные катастрофы; неравномерное распределение туристских потоков; политическая нестабильность в некоторых регионах мира; затянувшаяся мировая рецессия; волатильность валютных курсов; приоритет национальных, а не международных норм в туризме и т.п. Выявлены негативные факторы, препятствующие развитию въездного туризма в стране, предложены рекомендации по устранению имеющихся проблем. Рассмотренные ресурсы и туристские возможности Казахстана приводят к

целесообразности формирования современного туристского продукта. Разработка нового туристского продукта в Казахстане была бы конкурентоспособной на мировом рынке туристских услуг и способствовала бы привлечению иностранных туристов в Казахстан. Предложены пути развития внутреннего туризма в Казахстане, создание конкурентоспособной туристской отрасли, включающей развитие инфраструктуры и повышение качества предоставляемых услуг.

Ключевые слова: туризм, пандемия, экономика, бюджет, посетители, цели визита.