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Assessment of the Main Economic Indicators of Tourism Development in Kazakhstan

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Abstract:

Population growth and growth in its material welfare are important factors for changing the needs for recreation, making recreation a dynamic element. In this article, the authors consider the results of their analytical study of economic aspects of the development of tourism in Kazakhstan. In particular, the indicators of direct tourism, the dynamics of domestic and inbound tourist flow over a number of years in a regional context are analysed. Common weaknesses and potential for development of the industry are noted. The type of tourist services consumer is described by education, mobility, individualism and independence, awareness, greening of consciousness, insistence on high standards of services. The results of the study allowed the authors to draw a number of interesting conclusions that allow us to assess the overall state and importance of the industry for the country's economy, consumer activity in the tourist services market.

Keywords: recreational activities; accommodations; domestic tourism; inbound tourism; tourist attractions.

JEL Classification: L83; Z32.

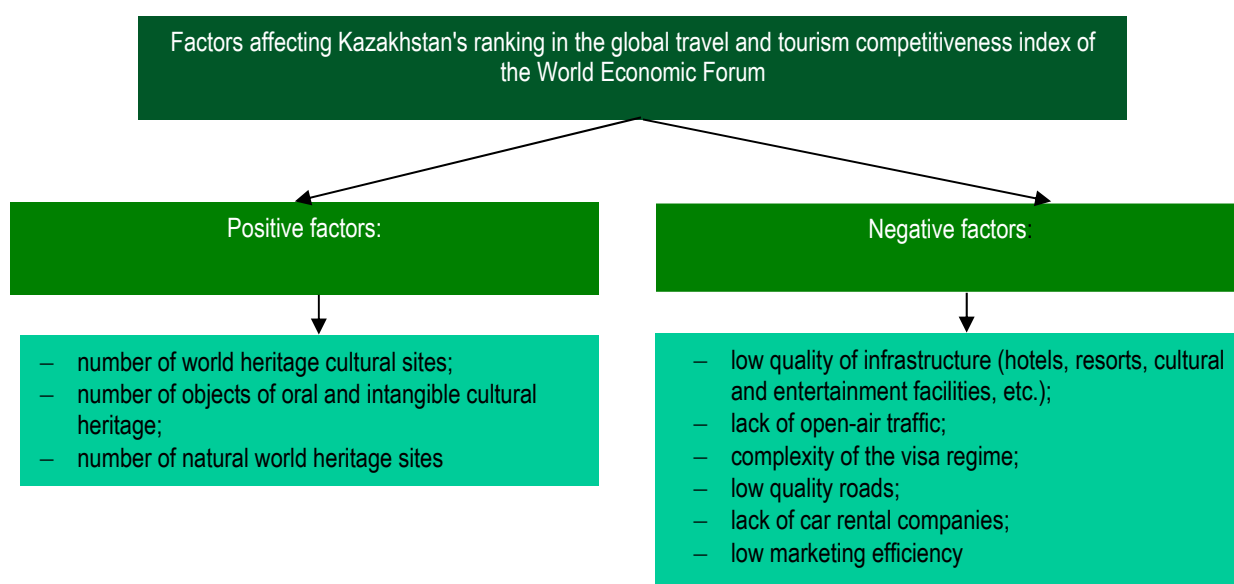
Introduction

Recreational activities can become a socio-economic "locomotive" of the country's development, and with effective organization and international relations will be a profitable source of the national economy (Silvestrov

2017; Voronkova *et al.* 2019). This is evidenced by world experience. Recreation is a rapidly developing sector of the world economy, the growth rate of which is 2 times higher than in other sectors of the economy. In the total world product, the share of tourism is about 10%, in export of services – 30%, and in global investment 7%. The jobs attributable to tourism in the global economy are 10%. 5% of all tax revenues in the world also comes from tourism. Developed tourist resources ensure the availability of tourist facilities and services, a comfortable stay for tourists, bring significant revenue to the state and business.

The need for recreation is a dynamic element of the consumer system and changes with population growth, changes in its structure, and growth in its material welfare. Demand for recreational services also differs by period, country affiliation. Its level depends on fashion, advertising, promotion costs, the popularity of services and the cultural level of the population (Shulga 2002). Kazakhstan ranked 81st out of 137 countries in the Global Travel and Tourism Competitiveness Index of the World Economic Forum (WEF) in 2017. In 2015, Kazakhstan ranked 85th in this rating (the rating is held once every two years) (Kulakhmetova *et al.* 2018). Factors of positive and negative impact on the rating of the travel and tourism competitiveness index of Kazakhstan, noted by WEF experts are summarized in Figure 1.

Figure 1. Influence factors on the ranking of travel and tourism competitiveness in the Republic of Kazakhstan



Source: (World Economic Forum Tourism and Travel Competitiveness)

Low indicators of the tourism industry in Kazakhstan in international ratings demonstrate that the state is not currently making enough efforts for a significant breakthrough in tourism. There are insufficient tourist products and services, the corresponding infrastructure is underdeveloped. In such conditions, there is a need for government intervention in provision of the basic tourism infrastructure, creation of favourable conditions for attracting investments, and formation of a positive perception of the country as a tourist and recreation centre (Nurmukhanova *et al.* 2018). The definition of priority tasks for the development of the recreational field must be determined on the basis of a deep analysis of the state and conditions of development. In the study performed, the analysis of the state of the recreational field was based on a comparative, structural, aspect, regional and correlation analysis of factors. The results of the analysis allowed us to achieve the purpose of the study – identification of the main tendencies in the development of the recreational field of Kazakhstan.

1. Directions of Tourism Development in the Regions of Kazakhstan

In the formation of a system of indicators of the state of tourism in Kazakhstan, an important part is given to the performance indicators of infrastructure objects: the number of objects, the number of visitors served by them, the volume of services rendered. The performance of infrastructure enterprises is also important in calculating the contribution of tourism to the country's gross domestic product (GDP). As part of the infrastructure of the subject area, two main elements are distinguished. The first one is hospitality service companies providing accommodation and catering services, and the second is enterprises involved in the formation of a recreational product. The second can include facilities that can function without tourists, but their indicators of economic activity increase significantly with increasing tourist flow in the distance. For example, places of entertainment, cultural and event facilities, national parks, etc.

Direct tourism activities include: accommodation services; the activities of tour operators, travel agents and other organizations providing tourism services; activities of sanatorium organizations (Sukhova *et al.* 2018; Dunets *et al.* 2019). The description of these species in accordance with the general classifier of types of economic activity (CCEA) is presented in Figure 2.

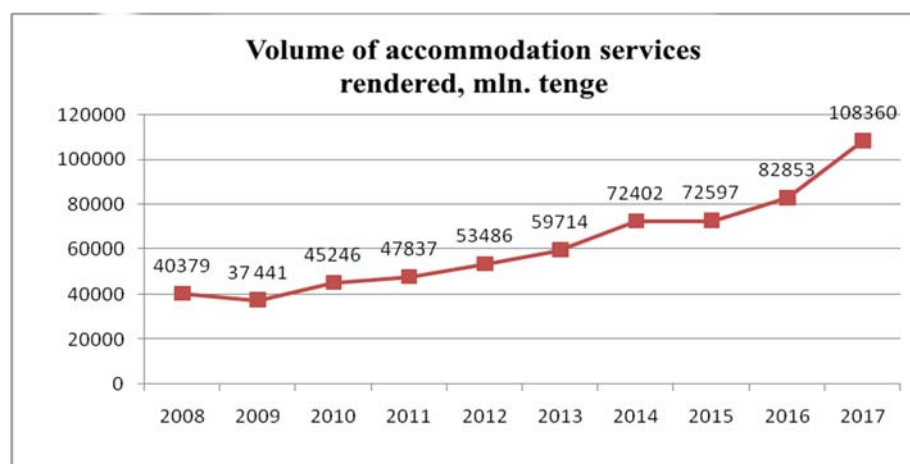
Figure 2. Direct activities in the field of tourism according to CCEA



Source: (General classifier of types of economic activity)

From direct activities, official statistics of tourism isolate only information on the volume of services provided by places of residence in the Republic of Kazakhstan. Graphically, the dynamics of the volume of services provided by places of residence is presented in Figure 3.

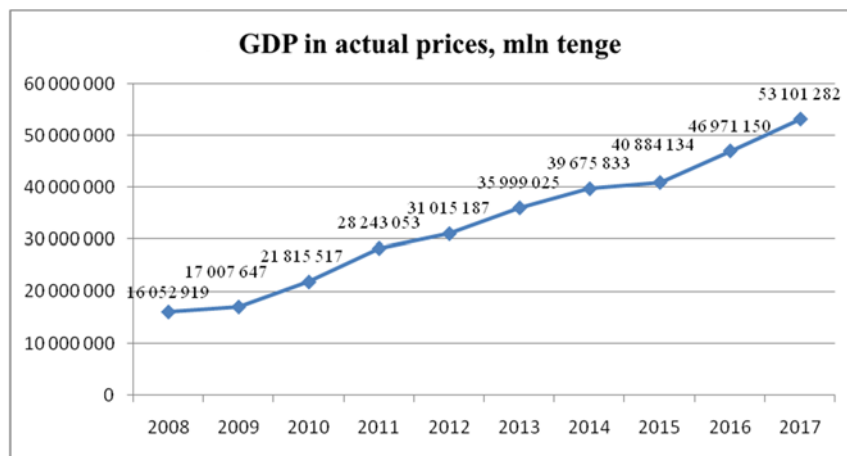
Figure 3. Dynamics of the volume of services provided by places of residence, mln. Tenge



Source: (The main socio-economic indicators of the Republic of Kazakhstan)

The dynamics of the volume of services rendered by places of residence increased in 2013-2017 from 40,379 million tenge to 108,360 million tenge. Since 2013, the cost of the volume of services provided by the accommodation services spiked, the growth rate of this indicator became higher compared to the growth rate of previous years. The volume of services provided by places of residence over a decade is steadily growing. We shall compare it with the dynamics of GDP (Figure 4).

Figure 4. Dynamics of GDP in actual prices, mln. tenge



Source: (The main socio-economic indicators of the Republic of Kazakhstan)

Over the past decade, the share of the volume of services provided by places of residence in the country's GDP has been insignificant and averages 0.2% (Table 1).

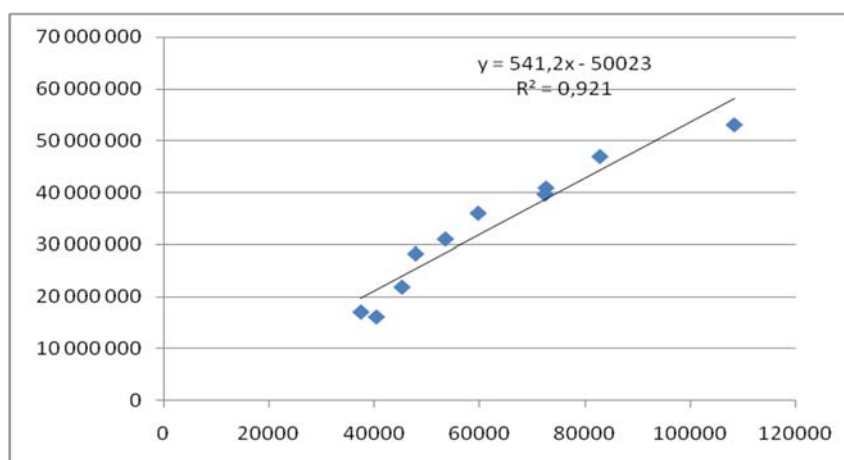
Table 1. Dynamics of GDP and the volume of services provided by places of residence in the Republic of Kazakhstan

Year	The share of services provided by places of residence in GDP, %
2008	0.25
2009	0.22
2010	0.21
2011	0.17
2012	0.17
2013	0.17
2014	0.18
2015	0.18
2016	0.18
2017	0.20

Source: The main socio-economic indicators of the Republic of Kazakhstan

For comparison, the contribution of the tourism sector to Turkey's GDP reaches 12.5%, and to Spain's GDP – 14.2%. The correlation between GDP and the volume of services provided by accommodation services is presented in Figure 5.

Figure 5. Correlation field between the volume of tourism services and GDP for 2008-2017

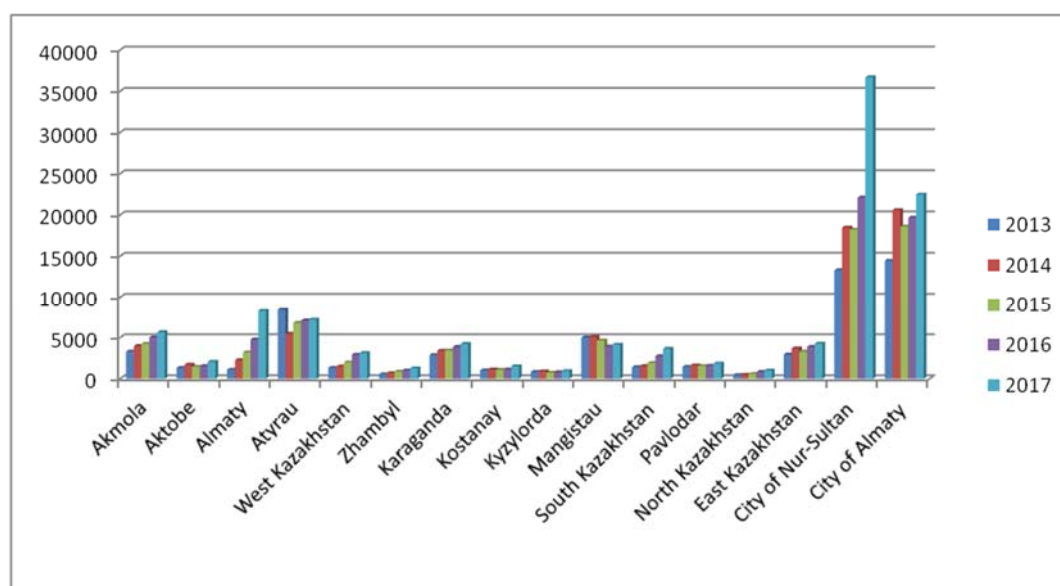


Source: (The main socio-economic indicators of the Republic of Kazakhstan)

The correlation index has a high value of 0.92. That is, the relationship between the indicators considered in the figure is positive. From the standpoint of econometric analysis, the 92% value of the indicator of the volume of tourism services under the current conditions is associated with the value of the indicator of the volume of

GDP. This is the main indicator reflecting the country's economic growth. The state of the country's economy affects the development of recreational activities. In the regional context, the largest increase in visitors served by domestic tourism residences is observed in the cities of Nur-Sultan and Almaty (Figure 6).

Figure 6. Dynamics of the volume of services rendered by locations in the context of regions for 2013-2017, mln. tenge



Source: (The main socio-economic indicators of the Republic of Kazakhstan)

Most of the regions during 2013-2017, with the exception of the Mangistau region, registered a consistent growth in the services rendered to accommodate visitors. The contribution of each region to the total volume of accommodation services is presented in Table 2.

Table 2. Shares of participation of regions in the total volume of accommodation services, %

Region	2013	2014	2015	2016	2017
1	2	3	4	5	6
The Republic of Kazakhstan	100	100	100	100	100
Akmola	5.6	5.5	5.9	6.1	5.2
Aktobe	2.2	2.3	2.0	1.9	1.9
Almaty	1.8	3.1	4.4	5.8	7.6
Atyrau	14.1	7.6	9.4	8.6	6.6
West Kazakhstan	2.2	2.0	2.7	3.5	2.9
Zhambyl	0.9	0.9	1.2	1.2	1.2
Karaganda	4.8	4.7	4.7	4.7	3.9
Kostanay	1.7	1.5	1.5	1.4	1.4
Kyzylorda	1.4	1.2	1.0	0.9	0.9
Mangistau	8.4	7.0	6.4	4.7	3.8
South Kazakhstan	2.3	2.1	2.6	3.3	3.4
Pavlodar	2.4	2.2	2.1	1.9	1.7
North Kazakhstan	0.7	0.7	0.8	1.0	0.9
East Kazakhstan	4.9	5.1	4.5	4.7	3.9
City of Nur-Sultan	22.3	25.5	25.1	26.7	33.9
City of Almaty	24.2	28.4	25.6	23.7	20.7

Source: The main socio-economic indicators of the Republic of Kazakhstan

The presence of natural recreational zones in Almaty, Karaganda, East Kazakhstan regions explain their large share in the structure of the volume of accommodation services compared to other regions. No clear tendency in the proportion of these areas is observed. The change in the share of each region is associated with a change in growth dynamics relative to other regions. The dynamics of the volume of accommodation services by region is presented in Table 3.

Table 3. Dynamics of growth in the volume of services by region

Region	2014 / 2013	2015 / 2014	2016 / 2015	2017 / 2016
The Republic of Kazakhstan	121.2	100.3	114.1	130.8
Akmola	119.7	106.7	118.0	112.7
Aktobe	130.0	85.2	107.2	134.1
Almaty	203.8	142.7	149.2	173.2
Atyrau	65.0	124.3	104.2	101.5
West Kazakhstan	111.2	134.4	147.5	107.4
Zhambyl	124.6	130.7	114.8	125.2
Karaganda	117.8	100.6	113.3	109.1
Kostanay	109.0	96.9	104.4	134.2
Kyzylorda	109.5	82.1	106.0	119.1
Mangistau	101.7	91.3	84.2	105.9
South Kazakhstan	110.1	124.4	142.6	133.8
Pavlodar	111.1	96.2	102.7	116.4
North Kazakhstan	109.7	123.2	141.6	121.1
East Kazakhstan	125.1	89.5	117.9	110.3
City of Nur-Sultan	138.9	98.8	121.3	165.9
City of Almaty	142.5	90.2	105.8	114.3

Source: The main socio-economic indicators of the Republic of Kazakhstan

In 2017, the republican growth rate compared to the previous year was 1.308. Leadership in growth dynamics was maintained by the Almaty region. The number of tourism infrastructure enterprises in Kazakhstan is growing steadily every year. However, with an increase in the number of hotels by 8.5% per year, the average occupancy rate has slightly changed (on average from 22% to 25%) over the past few years. The volume of manufactured products and services rendered by facilities providing services for the organization of leisure and entertainment, culture and sports also increases annually by 10-15%, and the occupancy rate affects it. The occupancy rate by region of facilities intended for vacationers is presented in Table 4.

Table 4. Occupancy of hotels (beds) by region, %

Administrative unit	2013	2014	2015	2016	2017
	Number of rooms, units / occupancy, %				
Republic of Kazakhstan	41,197	49,128	53,126	60,427	65,791
	1.4	22.0	22.8	22.7	25.0
Akmola	3,682	4,539	4,838	4,590	4,815
	16.6	22.6	13.3	16.8	17.4
Aktobe	1,278	1,469	1,578	1,789	1,894
	20.5	10.7	19.9	20.2	20.3
Almaty	2,433	3,729	4,666	6,457	8,204
	17.4	19.5	20.4	19.3	19.7
Atyrau	1,865	2,601	2,605	2,469	2,735
	36.4	17.3	28.0	27.7	26.7
West-Kazakhstan	1,447	1,490	1,484	1,546	1,510
	26.7	28.5	31.8	31.4	33.4
Zhambyl	838	1,154	1,550	1,776	1,834
	28.7	45.1	17.9	15.7	17.0
Karaganda	4,582	4,142	4,458	4,637	4,749
	20.3	17.8	20.5	17.6	17.8
Kostanay	1,473	1,711	1,848	1,817	2,036
	24.0	19.1	21.9	21.1	28.4
Kyzylorda	689	844	860	1,020	1,070
	22.1	25.6	18.9	18.3	20.7
Mangistau	2,124	2,182	2,512	3,035	2,857
	25.3	19.5	28.2	20.7	21.8
South Kazakhstan	1,812	2,337	2,523	3,116	3,734
	16.2	34.4	16.8	17.5	19.7
Pavlodar	2,051	2,199	2,324	2,900	2,810
	31.2	16.9	26.0	20.6	27.2

Administrative unit	2013	2014	2015	2016	2017
	Number of rooms, units / occupancy, %				
North Kazakhstan	768	838	917	1,357	1,496
	24.0	26.4	25.3	21.4	25.4
East Kazakhstan	5,349	6,557	6,953	8,320	8,958
	28.9	24.5	26.1	25.3	24.7
City of Nur-Sultan	5,492	6,383	5,949	7,002	8,244
	33.1	29.2	25.1	27.9	31.4
City of Almaty	5,314	6,953	8,061	8,596	8,845
	16.8	32.2	26.3	26.3	29.8

In 2017, the total occupancy rate in hotels (beds) in the Republic of Kazakhstan amounted to 25.0%. The greatest increase is observed in the Kustanai and Pavlodar regions. In Atyrau and East Kazakhstan regions, a decrease in this indicator is observed for the analyzed period. With low occupancy rates, there is an increase in their number in accommodation providers to 65,791 in 2017. In the regional context, the largest increase is observed in Almaty, Kustanai, South Kazakhstan regions, including the city of Nur-Sultan. For an objective presentation of the development of recreational activities of the country, it is necessary to analyze the recreational flows of domestic and inbound tourism, and also consider the tourist outbound flow.

2. The Dynamics of Economic Development and Services as Exemplified by Domestic Tourism

Over the past five years, the number of visitors served by domestic tourism accommodations (residents) in Kazakhstan has increased from 2,721,714 people in 2013 to 4,387,495 people in 2017. At the same time, at some stages related to the analysed period, a decrease in the flow was observed. Thus, for example, in 2015, fewer people were served, compared to 2014. But in 2017, relative to the four years preceding it, there is a clear excess in terms of the indicator under consideration. When compared with 2013, the increase was 61.2%, and compared to 2016, it was 25.5%. The dynamics of changes in the internal flow of consumers who used locations in the Republic of Kazakhstan for 2013-2017 is presented in Figure 7.

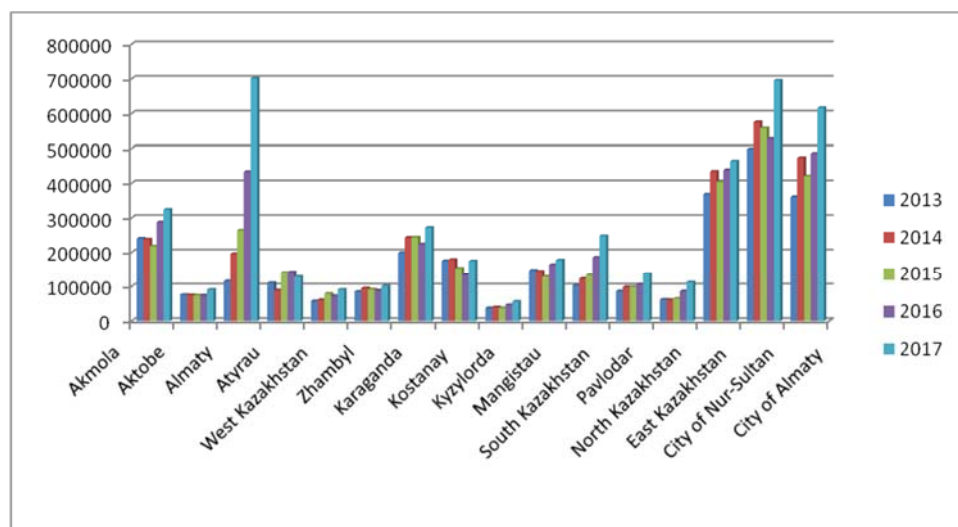
Figure 7. Dynamics of visitors served by domestic tourism accommodation in the Republic of Kazakhstan for 2013-2017



Source: The main socio-economic indicators of the Republic of Kazakhstan

The change in domestic flows throughout the country is manifested in an increase of almost 30% in the number of visitors served by domestic tourism accommodation services. In the context of regions, the internal flow of tourists over five years is presented in Figure 8.

Figure 8. Visitors served by domestic tourism accommodations in the regions of Kazakhstan for 2013-2017



Source: The main socio-economic indicators of the Republic of Kazakhstan

In the regional context, the largest increase in visitors served by places of residence is observed in Almaty, West Kazakhstan, Karaganda and South Kazakhstan regions (Table 5).

Table 5. Participation of regions in the total volume of visitors served by domestic tourism accommodation, %

Regions	2013	2014	2015	2016	2017
Akmola	8.82	7.62	7.01	8.23	7.39
Aktobe	2.78	2.40	2.39	2.13	2.06
Almaty	4.24	6.27	8.49	12.40	15.98
Atyrau	4.05	2.86	4.54	4.06	2.94
West Kazakhstan	2.12	1.96	2.55	2.08	2.07
Zhambyl	3.13	3.05	2.95	2.52	2.31
Karaganda	7.31	7.78	7.84	6.40	6.19
Kostanay	6.43	5.72	4.91	3.85	3.97
Kyzylorda	1.37	1.27	1.21	1.33	1.28
Mangistau	5.41	4.63	4.12	4.69	4.04
South Kazakhstan	3.79	3.92	4.27	5.31	5.64
Pavlodar	3.17	3.15	3.19	3.02	3.13
North Kazakhstan	2.28	1.95	2.08	2.46	2.56
East Kazakhstan	13.53	13.88	12.98	12.54	10.55
City of Nur-Sultan	18.31	18.41	17.94	15.09	15.84
City of Almaty	13.24	15.13	13.52	13.88	14.05

Source: The main socio-economic indicators of the Republic of Kazakhstan

There is no definite tendency in changes in the share of regions in the domestic tourist flow. Inbound tourism flow data by region is presented in Table 6.

Table 6. Visitors served by inbound tourism accommodation, people by region in Kazakhstan

Administrative unit	2013	2014	2015	2016	2017
The Republic of Kazakhstan	586,038	679,018	692,213	722,515	891,911
Ratio to 2017 in %	152.2	131.3	128.8	123.4	1.0
Akmola	9,260	13,678	8,025	12,609	17,235
Ratio to 2017 in %	186.1	126.0	214.8	136.7	1.0
Aktobe	8,520	10,061	9,411	10,323	9,900
Ratio to 2017 in %	116.2	98.4	105.2	95.9	1.0
Almaty	1,065	748	735	1,914	2,327
Ratio to 2017 in %	218.5	311.1	316.6	121.6	1.0
Atyrau	122,074	99,688	70,672	58,060	55,530
Ratio to 2017 in %	45.5	55.7	78.6	95.6	1.0

Administrative unit	2013	2014	2015	2016	2017
West Kazakhstan	13,241	11,813	15,178	14,085	21,415
Ratio to 2017 in %	161.7	181.3	141.1	152.0	1.0
Zhambyl	1290	1,905	1,984	2,545	2,742
Ratio to 2017 in %	212.6	143.9	138.2	107.7	1.0
Karaganda	15,918	17,832	14,952	17,509	20,827
Ratio to 2017 in %	130.8	116.8	139.3	119.0	1.0
Kostanay	6,820	7,516	8,425	12,111	18,049
Ratio to 2017 in %	264.6	240.1	214.2	149.0	1.0
Kyzylorda	1,262	1,754	1,742	2,939	3,173
Ratio to 2017 in %	251.4	180.9	182.1	108.0	1.0
Mangistau	29,162	29,870	47,840	28,114	28,726
Ratio to 2017 in %	98.5	96.2	60.0	102.2	1.0
South Kazakhstan	14,638	10,750	11,650	13,045	22,341
Ratio to 2017 in %	152.6	207.8	191.8	171.3	1.0
Pavlodar	7,835	7,122	11,399	8,565	10,262
Ratio to 2017 in %	131.0	144.1	90.0	119.8	1.0
North Kazakhstan	3,145	3,459	3,442	5,058	8,424
Ratio to 2017 in %	267.8	243.5	244.7	166.5	1.0
East Kazakhstan	18,846	19,279	20,587	22,463	23,177
Ratio to 2017 in %	123.0	120.2	112.6	103.2	1.0
City of Nur-Sultan	109,952	155,327	164,777	205,188	294,157
Ratio to 2017 in %	267.6	189.4	178.5	143.4	1.0
City of Almaty	223,010	288,216	301,394	307,987	353,626
Ratio to 2017 in %	158.6	122.7	117.3	114.8	1.0

For 2013-2017, there has been a gradual increase in the number of visitors served by inbound tourism accommodation (non-residents). In 2017, it amounted to 891,911 people. This is 52.2% more compared to 2013, and by 23.4% more compared to 2016. The overall change in inbound tourism flow dynamics is shown in Figure 9.

Figure 9. Dynamics of visitors served by inbound tourism accommodation in the Republic of Kazakhstan for 2013-2017



Source: The main socio-economic indicators of the Republic of Kazakhstan

The increase in the flow of tourists by region is uneven. Participation of regions in the general inbound tourism is presented in Table 7.

The shares of regions in the inbound tourist flow for 2013-2017 did not undergo significant change. The largest shares are in Almaty and Nur-Sultan. The advantage of the city of Almaty and the city of Nur-Sultan as tourist flow centers is explained by the relatively developed infrastructure for receiving tourists in comparison with other regions. Objects that attract tourists in these cities are within walking distance. Roads, hotels, service in these cities are closer to world standards. The main indicators of the development of the tourism industry, namely, the export and import of tourism business services for 2013-2017, are presented in Table 8.

Table 7. The participation of regions in serving visitors with places for inbound tourism, %

Regions	2013	2014	2015	2016	2017
Akmola	1.58	2.01	1.16	1.75	1.93
Aktobe	1.45	1.48	1.36	1.43	1.11
Almaty	0.18	0.11	0.11	0.26	0.26
Atyrau	20.83	14.68	10.21	8.04	6.23
West Kazakhstan	2.26	1.74	2.19	1.95	2.40
Zhambyl	0.22	0.28	0.29	0.35	0.31
Karaganda	2.72	2.63	2.16	2.42	2.34
Kostanay	1.16	1.11	1.22	1.68	2.02
Kyzylorda	0.22	0.26	0.25	0.41	0.36
Mangistau	4.98	4.40	6.91	3.89	3.22
South Kazakhstan	2.50	1.58	1.68	1.81	2.50
Pavlodar	1.34	1.05	1.65	1.19	1.15
North Kazakhstan	0.54	0.51	0.50	0.70	0.94
East Kazakhstan	3.22	2.84	2.97	3.11	2.60
City of Nur-Sultan	18.76	22.88	23.80	28.40	32.98
City of Almaty	38.05	42.45	43.54	42.63	39.65

Source: The main socio-economic indicators of the Republic of Kazakhstan

Table 8. Export and import of tourism services in Kazakhstan for 2013-2017

Indicator name	City				
	2013	2014	2015	2016	2017
1	2	3	4	5	6
Export of services, million US dollars, of which:	5,384.7	6,618.1	6,476.0	6,309.7	6,436.60
International travel (the volume of services provided by Kazakhstan to non-residents), including:	1,522.0	1,467.30	1,533.6	1,548.5	1,780.50
volume of services provided by Kazakhstan to non-residents from the CIS countries	1,164.60	1,094.3	1,132.1	1,161.00	1,368.00
volume of services provided by Kazakhstan to non-residents from other countries	357.4	373	401.5	387.5	412.5
Import of services, million US dollars, of which:	12,458.4	12,916.2	11,582.2	11,062.8	10,849.5
International travel (the volume of services received by Kazakhstan from non-residents) including:	1,843.3	1,932.00	1,979.0	1,657.8	1,790.60
- the volume of services received by Kazakhstan from non-residents from the CIS countries,	1,190.90	1,278.2	1,434.0	1,235.40	1,264.90
- the volume of services received by Kazakhstan from non-residents from other countries	652.4	653.8	545	422.3	525.7
The number of visitors for inbound tourism, people including: CIS countries and countries outside the CIS	6,841,085	6,332,734	6,430,158	6,509,390	7,701,196
	6,213,390	5,655,246	5,835,592	5,935,690	7,060,630
	627,695	677,488	594,566	573,700	640,566
Activities of tour operators, travel agents and other organizations providing tourism services	6.6	6.5	7.3	7.2	7.3
Accommodation procurement services	22	25.7	25.3	26.5	27.6
Activities of sanatorium-and-health-resort organizations	10.8	10.3	10.5	10	9.6
Activities for the organization of leisure, entertainment, culture and sports	61.5	65.8	68.2	70.2	71.8
Activities of tour operators, travel agents and other organizations providing tourism services	70,475	71,233	85,002	94,465	108,152
Accommodation procurement services	76,360	86,272	106,823	112,582	118,606
Activities of sanatorium-and-health-resort organizations	71,059	76,885	77,245	83,385	88,163
Activities for the organization of leisure, entertainment, culture and sports	57,613	63,238	67,329	82,124	86,208

Source: Draft state program for the development of the tourism industry of the Republic of Kazakhstan until 2025

The export of tourism services valued in US dollars over the past five years remains at approximately the same level, despite the fact that the physical indicators of the volume of services provided have increased. This

was affected by significant changes in Kazakhstan in terms of the ratio of the tenge to the US dollar. International travel increased in the structure of tourism services exports (the volume of services provided by Kazakhstan to non-residents), including the volume of services received by Kazakhstan from non-residents from the CIS countries and the volume of services received by Kazakhstan from non-residents from other countries.

The number of visitors leaving the country exceeds the number of visitors entering the country by almost 1.4 times. In the course of the nationwide sample statistical survey, household spending on travel for 2017 was determined. The structure of travel expenses of the population of Kazakhstan is presented in Table 9.

Table 9. Travel cost structure

Main expense items	According to national tourism (for personal purposes), %	On business and professional trips, %
Shopping	26.2	15.9
Fare	30.2	34.8
Nutrition	16.8	19.0
Payment for hotels and other places of residence	16.1	22.4
For entertainment and cultural events	2.5	2.8

Source: The main socio-economic indicators of the Republic of Kazakhstan

The largest share of expenditures of the population of Kazakhstan on national tourism accounts for transport costs. We assume that such a structure could have developed due to the overwhelming majority of the short-term type of tourist vacation, the so-called "weekend tourism" (Koshkinbaeva *et al.* 2019(1); Koshkinbaeva *et al.* 2019(2)). Otherwise, the share of placement costs would be much higher. We shall note that Kazakhstanis prefer to cut spendings on entertainment and cultural events in favour of shopping for goods and food. The price and the convenience of the route have the greatest influence on the choice of a place of rest during the holidays (7-14 days). The average cost of staying in hotels abroad is shown in Table 10.

Table 10. Average cost of staying in hotels abroad and in Kazakhstan (person/day)

Name	Year			2017 in % to	
	2015	2016	2017	2015 г.	2016
1	2	3	4	5	6
Turkey (Istanbul)	16,070	18,575	18,985	118.1	102.2
UAE (Dubai)	37,470	38,430	38,715	103.3	100.7
Kazakhstan (Almaty resort areas)	7,858	8,728	9,670	123.1	110.8
Bayanaul	4,600	4,800	5,000	108.7	104.2
Sanatorium "Moyldy"	9,700	10,500	11,300	116.5	107.6

Most Kazakhstanis prefer a vacation abroad. The average cost of staying in countries such as Turkey and the UAE is higher than in Kazakhstan, but such situation is justified by the quality of service.

Conclusions

Based on the analysis of recreational activities for 2013-2017, the following were identified: the relationship between tourism development and the socio-economic climate in Kazakhstan; industry development tendencies by region and by country at large; the share of tourism activities in the formation of gross domestic product; features of the formation of statistical indicators on tourism. According to the results of the study, the authors made the following conclusions:

- the share of accommodation services rendered in the country's GDP structure over the entire studied period is insignificant and averages 0.2%;
- the dynamics of growth indicators in the volume of services in this area is associated with the general state of socio-economic processes in the country and has a steady, progressively growing nature;
- the recreational business is mainly represented by small enterprises that provide a narrow range of services;
- compared to the leading countries positioned as tourism-oriented, Kazakhstan is much inferior in terms of volume of tourism services rendered;
- the number of visitors leaving the country exceeds the number of visitors entering the country by almost 1.4 times. The flow of domestic tourism is less than half of that of the outbound;

- in the structure of export of tourism services, international trips provided by Kazakhstan to non-residents increased, including the volume of services received from non-residents from the CIS countries and other countries;
- the potential for tourism development in Kazakhstan is contained in the following indicators: the number of cultural objects of world heritage, the number of objects of oral and intangible cultural heritage, the number of natural world heritage sites;
- in the general flow of tourists, middle class representatives prevail and will prevail. This class of tourists is accustomed to and demands good conditions and quality service in exchange for the money spent. The modern type of mass consumer of tourist services is described by awareness, education, insistence on high standards of services, individualism and independence, greening of consciousness, mobility. There is a tendency to move from mass conveyor tourism to mass differentiated tourism, where there is a demand for highly specialized segments of services, new tourist destinations, the expansion of online technologies in obtaining information and rendering services.

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