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**Analysis of the state of the  
tourism industry in Kazakhstan**

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**Қазақстандағы туризм  
индустриясын ағымдық талдау**

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**Анализ текущего состояния  
индустрии туризма  
в Казахстане**

The program for the development of promising areas of the tourism industry of the Republic of Kazakhstan for 2010 - 2014 years was developed in order to implement the State program for accelerated industrial-innovative development of Kazakhstan for 2010 - 2014 years, approved by the Decree of the President of the Republic of Kazakhstan dated March 19, 2010 № 958, and in accordance Strategic Development Plan of the Republic of Kazakhstan till 2020, approved by the Decree of the President of the Republic of Kazakhstan dated February 1, 2010 № 922.

The program is aimed at sustainable development of the tourism industry through the establishment and development of infrastructure, the formation of the image of Kazakhstan to increase its attractiveness as a tourist destination.

**Key words:** business traveler, «Tourist donor», tourist complex.

Қазақстан Республикасы туристік индустриясының перспективалы бағыттарын дамыту жөніндегі 2010 - 2014 жылдарға арналған бағдарлама Қазақстан Республикасы Президентінің 2010 жылғы 19 наурыздағы № 958 Жарлығымен бекітілген Қазақстан Республикасын үдемелі индустриялық-инновациялық дамыту жөніндегі 2010-2014 жылдарға арналған мемлекеттік бағдарламаны іске асыру мақсатында және Қазақстан Республикасы Президентінің 2010 жылғы 1 ақпандағы № 922 Жарлығымен бекітілген Қазақстан Республикасының 2020 жылға дейін Стратегиялық даму жоспарына сәйкес әзірленді.

Бағдарлама инфрақұрылымды жасау және дамыту жолымен туризм индустриясын орнықты дамытуға, Қазақстанның туристік бағыт ретіндегі тартымдылығын арттыру үшін оның имиджін қалыптастыруға бағытталған.

**Түйін сөздер:** бизнес-турист, «туристік донор», туркешен.

Программа по развитию перспективных направлений туристической индустрии Республики Казахстан на 2010-2014 годы разработана в целях реализации Государственной программы по форсированному индустриально-инновационному развитию Республики Казахстан на 2010-2014 годы, утвержденной Указом Президента Республики Казахстан от 19 марта 2010 года № 958 и в соответствии со Стратегическим планом развития Республики Казахстан до 2020 года, утвержденным Указом Президента Республики Казахстан от 1 февраля 2010 года № 922.

Программа направлена на устойчивое развитие индустрии туризма путем создания и развития инфраструктуры, формирования имиджа Казахстана для повышения его привлекательности как туристского направления.

**Ключевые слова:** бизнес-турист, «туристический донор», тур-комплекс.

**ANALYSIS  
OF THE STATE  
OF THE TOURISM  
INDUSTRY  
IN KAZAKHSTAN**

In the present conditions of the world economy tourism is becoming one of the leading and fastest growing industries. According to UNWTO tourism ranks fourth in world exports of goods and services (7.4%), second only to the export of automobiles, chemical products and fuels. The yield, the industry ranked third in the world after the oil industry and the automotive industry.

Kazakhstan, with a wealth of tourist and recreational potential, is characterized by an insufficient level of development of tourism. Its share in the gross domestic product (services are counted only for accommodation and meals) is about 0.3%. In 2012, revenue from tourist activities was 151.7 million tenge, which is almost 2 times more than in 2008 (77.6 mln.). The number of people employed in the industry was 129 000 people. Taxes paid to the budget of the republic amounted to 24.2 million tenge in 2012. In 2012, the country functioned 1994 tourist organizations that were served 641.3 thous people, which is 1.7% more than in the previous year (630.6 thousand. people in 2011) and 32.1% more than in 2010 (485.6 thousand. people). In the structure of tourist activity, domestic tourism reached 31.5%, inbound tourism – 4.7%, outbound tourism – 63.8%.

In January – September 2013 the country functioned 1705 tourist organizations that were served 424.7 thous people, which is 16.3% lower than in the corresponding period of 2012. In the structure of tourist activity, domestic tourism reached 44.4%, inbound tourism – 2.3%, outbound tourism – 53.3%. If these figures are compared with the data for January – September 2012, the overall structure of tourist services, a decrease in the proportion of outbound tourism and inbound 8% 2.3% increase in domestic tourism by 10.3%.

As in 2012 operating in Kazakhstan 1526 placement capacity of 83 103 beds, which is 2.6% more than in 2011. Of the total, 61.5% were of the hotel, including 26.8% of hotel categories, 34.7% with no category, 38.5% were other placements. The main part (55.3%) is concentrated in the cities of Almaty (14.7%), Astana (9.7%), East Kazakhstan (19.2%) and Karaganda (11.7%) regions, respectively.

It should be noted that 875 hotels with a capacity of 28,841 beds, make up 56.4% of the total number of hotels and do not have a category. As of January – September 2013 operating in Kazakhstan 1654 placement capacity of 89 464 beds, which is 8.5% more than

in January-September 2012. Of the total number of placements amounted to 58.3% of the hotel, of which 22.4% of hotels categories, 35.9% without a category, and 41.7% were other placements. The main part (61.3%) is concentrated in the East Kazakhstan region (19.1%), Almaty (11.3%) and Astana (9.7%), Akmola (11.1%) and Karaganda (10, 2%) areas respectively. In 2012, the load factor of the number of rooms placements amounted to 24.9% (24% in 2011).

The bookings figure was 33.3% (39.2% in hotels categories, 28.8% in hotels with no category). At the same time the highest occupancy rate was registered in hotels 5\* (43.7%), the lowest in hotels of category 1\* (29.8%). In other places of accommodation, the figure was 11.4%. The highest load factor of the number of rooms in 2012 amounted to 50.3% in the Mangistau region, 42.8% in the city of Almaty and 41.3% in the Atyrau region. The lowest rate is around 13% in Almaty and South Kazakhstan areas. In Astana Occupancy rate 34.5%, respectively.

In January – September 2013 Occupancy rate of placements was 22.7% (26.1% in the same period of 2012). The bookings figure was 28.1% (35.7% – in hotels categories, 23.4% in hotels with no category) . At the same time the highest occupancy rate was registered in hotels 5\* (46.1%), the lowest in hotels of category 1\* (21.9%). In other places of accommodation, the figure was 15.1%. The highest load factor of the number of rooms in the first nine months of 2013 amounted to 54.2% in Atyrau, 34.9% in the Mangistau region and 33% in the city of Astana. The lowest rate was recorded in Almaty (14.1%) and North Kazakhstan (15.3%) regions. In Almaty, the load factor of the number of rooms was 26.8%, respectively. Prices for accommodation in places of accommodation with a high level of hotel services is much higher than in similar hotels in major tourist destinations in the world. Room rates in international branded 5\* hotels in the cities of Astana and Almaty is 2-3 times higher than in Europe.

Prices for services in other accommodations – guest houses, tourist centers, shelters, camping sites, hostels for visitors and others – are much lower. The proposed tourist services, including hotels, are available with a limited service and are poorly regulated. It should be noted that the high price of accommodation and tickets significantly increase the cost of the tour in Kazakhstan and, accordingly, reduce its price competitiveness in the international market. The growing demand for domestic and inbound tourism in Kazakhstan in the period from 2000 to 2007, followed by recession in 2008 and

2009 due to the economic crisis. With economic recovery in 2010, growth in demand for tourism resumed in 2011 and reached a record level in 2012, an increase of tourist arrivals of 6.3% and an increase in the number of overnight stays by 6.7%:

1) from 43,298 visitors in 2000 to 3,026,227 visitors in 2012;

2) of the 1,250,649 overnight stays in 2000 to 7,560,134 overnight stays (bed- days) in 2012 .

In 2012, the structure of tourist arrivals was characterized by the following indicators:

1) the types of accommodation facilities : 88.7% of the visitors were placed in hotels (46.3% of the visitors – in hotels categories, 42.4% of visitors in hotels with no category), 11.3% of visitors to other placements;

2) by regions : 49% of visitors were registered in Astana (18.4%) and Almaty (18.2%) and the East Kazakhstan region (12.4%) , in the Karaganda region of 7% , 6.9% in Atyrau in Mangistau 5.9% and other areas 31.2% of the visitors;

3) Country of origin: Kazakhstan 82.8% of visitors from non-resident visitors (519,222 people) – 27.3% of visitors from the Russian Federation, 10.4% of visitors from the United Kingdom of Great Britain and Northern Ireland, 7.6% of visitors United States, 6.2% of visitors from the Republic of Turkey, 6.1% of visitors from the Republic of Italy, 4.7% of visitors from the Federal Republic of Germany, 4.5% of visitors from the People's Republic of China and 33.2% of visitors from other countries;

4) purpose of travel: business and professional – 64% , holidays and vacation – 30% visiting friends and relatives – 4.1% , other purposes – 1.9%. It is noteworthy that compared to Kazakhstan foreign visitors to travel more for leisure and vacation (34.6%), while non-residents mainly from the business and professional goals (88.1%).

As can be seen from the above, tourism in Kazakhstan relies mainly on the local population, as well as business and professional trips of foreign residents.

The total number of foreign residents who moved to Kazakhstan in 2012 amounted to 6,163,204, which is 8.4% more than in 2011.

Most of the foreign residents came from the three neighboring countries: the Republic of Uzbekistan (37.1%), Kyrgyz Republic (23.6%) and the Russian Federation (22.2%). The main reasons for their arrival were private (75.9%) and transit travel (18.2%), while business tourism and tourism for the purpose of recreation and holidays accounted for 5.9%. Many foreign visitors arriving to the stop in the family or friends, transit or arrive one day (day visitors).

Visitors of outbound tourism in 2012 amounted to 9,065,579, which is 13% more than in 2011. Such volumes of outbound tourism contribute to the formation of the negative balance of tourism (more than 434 million US dollars) in the balance of payments. Kazakhstan remains “tourist donor”

for countries such as the Republic of Turkey, the People’s Republic of China, the United Arab Emirates, the Kingdom of Thailand, where rapidly developing tourism industry, creating new jobs, improving the structure of the balance of payments and rising living standards.

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