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CURRENT TRENDS IN TOURISM DEVELOPMENT IN KAZAKHSTAN: DEMAND, PRODUCTIVITY AND EXPENSES

The article examines the development of the tourism sector of the Republic of Kazakhstan in the context of the transformation of the service sector. The indicators of labor productivity, measured in terms of gross value added per employee, as well as the dynamics of tourist demand and financial flows are analyzed. The changes in the main types of economic activity forming the infrastructural basis of tourism are considered. It is revealed that during the period under study, there was a steady increase in labor productivity in the service sector, accompanied by an expansion in the volume of tourist services provided and an increase in the number of visitors.

It is determined that the greatest positive dynamics is typical for commercially oriented activities, as well as for the segment of accommodation services, which indicates an increase in economic activity in the tourism industry. The structure of tourist expenses is analyzed, as a result of which a faster growth of outbound tourism expenses is revealed, indicating the presence of an outflow of financial resources. It is shown that despite the growth of domestic and inbound tourism, there remains an imbalance in the distribution of financial flows.

The key directions of increasing the efficiency of the tourism sector have been identified, systematized in the form of a matrix model. It is shown that the development of the industry requires an integrated approach, including improving infrastructure, increasing the competitiveness of the tourism product and the introduction of digital technologies. The practical significance of the obtained results for the development of tourism development strategies is substantiated and the directions of further research are determined.

Keywords: *tourism, service sector, labor productivity, gross value added, tourist demand, tourist expenses, Kazakhstan.*

Кілт сөздер: *туризм, қызмет көрсету саласы, еңбек өнімділігі, жалпы қосылған құн, туристік сұраныс, туристердің шығыстары, Қазақстан.*

Ключевые слова: *туризм, сфера услуг, производительность труда, валовая добавленная стоимость, туристский спрос, расходы туристов, Казахстан.*

Introduction. The development of the tourism sector in modern conditions is one of the key directions of economic diversification and increasing the sustainability of national economic systems. The service sector, within which a significant part of tourist activity is formed, plays an important role in creating added value, providing employment and stimulating domestic demand. In this regard, it is particularly important to study the factors determining the effectiveness of the tourism sector, as well as to identify the relationships between labor productivity, the dynamics of tourist demand and financial flows.

Despite the existence of a significant number of studies on tourism development, there remains a need for a comprehensive analysis that allows integrating performance and demand indicators into a single assessment system. The research aims to determine the nature of the relationship between labor productivity in the service sector and the development of the tourism sector, as well as to identify ways to increase its economic efficiency.

The purpose of the study is to identify key trends in the development of the tourism sector of the Republic of Kazakhstan based on an analysis of labor productivity, tourist demand and cost structure, as well as substantiate areas for improving the efficiency of the industry. To achieve this goal, the following tasks were addressed:

- the analysis of labor productivity dynamics in the service sector was carried out;

- changes in tourist demand and financial flows were studied;
- structural features of the industry development were identified; directions for improving the tourism sector were formulated.

The methodological basis of the research consists of methods of comparative and structural analysis, as well as elements of economic and statistical analysis. Official data of the Bureau of National Statistics of the Republic of Kazakhstan are used as an information base. The data was processed and interpreted using standard methods for analyzing dynamics and relative indicators, which ensures reproducibility and reliability of the results obtained.

Literature review. Modern research in the field of tourism economics focuses on the relationship between investment activity, the effectiveness of the industry and its contribution to economic development. In particular, it is noted that investment policy plays a key role in the formation of a sustainable tourism infrastructure, but its implementation in Kazakhstan is accompanied by a number of institutional and financial constraints [1]. The issues of assessing the tourism potential and the development of ecological tourism are also considered as important areas for increasing the competitiveness of the industry, especially in the context of economic diversification [2].

Significant attention in the scientific literature is paid to the impact of digitalization and regional factors on the development of the labor market and tourism activities. It is shown that digital transformation contributes to the formation of new conditions for the development of the service sector and increasing its efficiency [3], however, digital inequality persists between regions, which limits the potential for tourism growth [4]. In addition, the research highlights the importance of informatization as a factor in strengthening the link between tourism and regional economic development.

Foreign studies demonstrate that the development of tourism has an impact on overall factor productivity and economic dynamics, which confirms the need for a comprehensive analysis of the effectiveness of the industry. At the same time, quantitative assessments of the competitiveness of the tourism sector based on macroeconomic indicators make it possible to identify structural differences between countries and identify growth factors [5].

Despite a significant amount of research, a number of unresolved issues remain. In particular, the relationship between labor productivity, tourist demand and financial flows in the context of the national economy has not been sufficiently studied [6,7]. There is a fragmentation of approaches in which efficiency, demand and costs are considered separately, without integrating them into a single analytical model. This necessitates further research aimed at a comprehensive analysis of the tourism sector and the development of tools to improve its effectiveness, which determined the choice of the topic of this study.

The main part. The modern development of the tourism sector is directly related to the general trends in the transformation of the service sector, which generates the main added value and creates conditions for the growth of economic activity. In the context of structural changes in the economy of the Republic of Kazakhstan, the analysis of labor productivity, reflecting the efficiency of using labor resources and the level of economic return in various types of activities, is of particular importance.

Labor productivity, measured in terms of gross value added per employee, makes it possible to identify industry differences in the efficiency of the service sector and identify areas that have the greatest impact on the development of the tourism sector. In this context, the analysis of the dynamics of this indicator is an important tool for assessing structural shifts and identifying points of economic growth.

In order to identify trends in labor productivity in the context of the main types of service sector activities, an analysis of data for 2022-2024 was carried out, the results of which are presented in Table 1.

Table – 1

Dynamics of labor productivity in the service sector of the Republic of Kazakhstan (GVA per employee, thousand tenge)*

Indicators	2022	2023	2024	Change, 2024/2022	
				+/-	%
In the economy as a whole	10083,2	11354,2	12886	+2802,8	27,8%
Production of services	8 130,3	9 586,9	10 963,9	+2833,6	34,8%
Wholesale and retail trade; repair	11 380,2	14 399,0	17 009,4	+5629,2	49,5%

Transportation and warehousing	9 978,0	10 369,2	11 570,3	+1592,3	16,0%
Accommodation and food services	5 302,9	6 091,2	6 797,6	+1494,7	28,2%
Information and communication	12 670,2	13 820,9	15 985,7	+3315,5	26,2%
Financial and insurance activities	17 026,7	19 505,3	22 960,5	+5933,8	34,8%
Real estate activities	9 768,5	10 989,8	14 908,8	+5140,3	52,6%
Professional and scientific activities	13 512,1	15 802,6	16 133,1	+2621,0	19,4%
Administrative services	7 902,0	10 343,5	11 581,3	+3679,3	46,6%
Public administration and defense	3 856,4	4 664,7	5 087,8	+1231,4	31,9%
Education	3 698,5	4 511,5	4 780,8	+1082,3	29,3%
Healthcare	5 274,0	6 043,6	6 980,6	+1706,6	32,4%
Art and recreation	6 734,6	7 509,7	8 157,6	+1423,0	21,1%
Other services	6 828,5	6 830,8	8 283,8	+1455,3	21,3%

**compiled by the authors based on the source [8]*

The analysis of the data presented in Table 1 shows steady growth in labor productivity both in the economy as a whole (+27.8%) and in the service sector (+34.8%). The most significant positive dynamics is observed in commercially oriented activities such as real estate transactions (+52.6%), wholesale and retail trade (+49.5%) and administrative services (+46.6%), which indicates the expansion of market mechanisms and the strengthening of the service component of the economy.

At the same time, growth is more moderate in a number of socially oriented industries, including education (+29.3%), healthcare (+32.4%) and public administration (+31.9%), reflecting the specifics of their functioning and limited market factors for improving efficiency.

Of particular importance for the tourism sector are such activities as the provision of accommodation and catering services (+28.2%), transportation and warehousing (+16.0%), as well as information and communications (+26.2%), which form the infrastructure and service base of tourism. The results obtained indicate the presence of positive dynamics in the key components of the tourism industry, however, differences in growth rates indicate uneven development of individual segments.

For an in-depth analysis of trends in the development of the tourism sector and an assessment of its economic significance, it is advisable to consider indicators characterizing the dynamics of tourist demand and the volume of financial flows in the industry. Unlike labor productivity, which reflects the efficiency of resource use, these indicators allow us to assess the scale, intensity and structure of tourism activities. The results of the analysis are presented in Table 2.

Table – 2

The dynamics of tourist demand and expenses in the Republic of Kazakhstan

Indicators	2022	2023	2024	Change, 2024/2022	
				+/-	%
Accommodation services, million tenge	182 865,3	229 248,7	299 840,6	+116 975,3	64,0%
Inbound tourism, thousand people	927,8	1 084,8	1 294,9	+367,0	39,6%
Domestic tourism, thousand people	6 407,3	7 054,5	7 824,4	+1 417,1	22,1%
Tourist expenses, million tenge	644 281,7	868 893,3	957 701,7	+313 420,0	48,6%
Domestic tourism (expenses), million tenge	419 089,0	542 139,4	582 708,6	+163 619,7	39,0%
Outbound tourism (expenses), million tenge	225 192,8	326 753,9	374 993,0	+149 800,3	66,5%

**compiled by the authors based on the source [9]*

The analysis of the data presented in Table 2 indicates a significant growth in the tourism sector of the Republic of Kazakhstan in 2022-2024, accompanied by an increase in both the volume of services provided and tourist flows. The most pronounced dynamics is observed in terms of accommodation services, the

volume of which increased by 64.0%, indicating an expansion in market capacity and an increase in demand for tourist infrastructure services.

The growth of tourist flows is steady: the number of inbound tourists increased by 39.6%, and domestic tourism — by 22.1%, reflecting both the restoration of international mobility and the intensification of domestic tourist demand. At the same time, the higher growth rates of inbound tourism indicate a gradual increase in the external attractiveness of the country.

Financial indicators also show positive dynamics: the total expenses of tourists increased by 48.6%. However, the cost structure shows an imbalance — the highest growth rates are typical for outbound tourism (+66.5%), which indicates the continued significant leakage of financial resources outside the country. Domestic tourism also shows an increase in expenses (+39.0%), but its pace is inferior to the outbound direction.

Collectively, the results obtained reflect both the expansion of the tourism market and the presence of structural constraints related to the lack of competitiveness of the domestic tourism product and uneven infrastructure development.

Thus, the results presented in Tables 1 and 2 make it possible to identify key features of the development of the tourism sector in Kazakhstan, including increased labor productivity, increased tourist demand and increased financial flows while maintaining structural imbalances. This necessitates the development of systemic directions for improving the efficiency and sustainable development of the industry, summarized in the form of a matrix model shown in Figure 1.

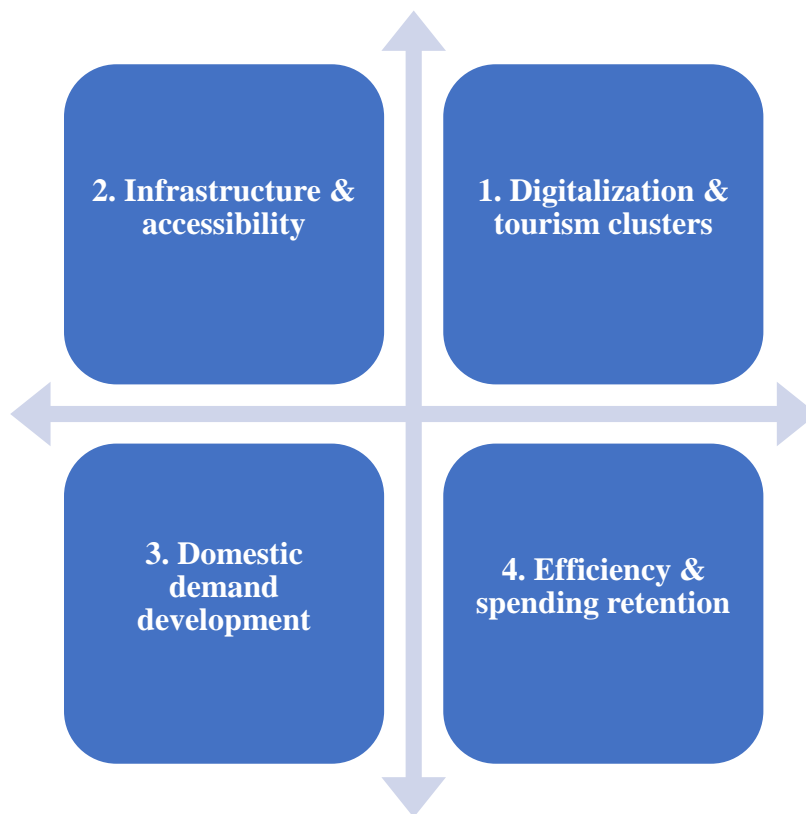


Figure – 1. **Directions for improving the efficiency and sustainable development of tourism in Kazakhstan***

**compiled by the authors*

The matrix model shown in Figure 1 reflects the key areas for improving the efficiency and sustainable development of the tourism sector of the Republic of Kazakhstan, grouped along two axes — the level of economic return and the level of infrastructure development and tourist demand. Using the matrix approach allows us to systematize priority measures for the development of the industry and highlight the relationship between qualitative and quantitative parameters of tourism functioning.

The upper-right quadrant contains areas focused on the integrated development of tourism clusters and the digitalization of services, which simultaneously improves the quality of service and economic efficiency. The upper left quadrant reflects the need to develop infrastructure and increase the accessibility of tourist areas as a basic condition for the growth of tourist demand.

The lower left quadrant is associated with stimulating domestic tourism and expanding consumer demand, which helps to increase the utilization of existing infrastructure. The lower right quadrant focuses on increasing economic efficiency and retaining tourist spending within the country, which is key to reducing financial resource leakage.

In general, the proposed model allows us to comprehensively reflect the directions of transformation of the tourism sector and can serve as a basis for the formation of effective state and regional tourism policy.

Conclusion. The conducted research made it possible to comprehensively analyze the development of the tourism sector of the Republic of Kazakhstan based on an assessment of labor productivity, the dynamics of tourist demand and the structure of financial flows. It has been revealed that in 2022-2024, there is a steady increase in labor productivity in the service sector, accompanied by an expansion in tourist activity and an increase in visitor spending. It is determined that against the background of positive dynamics, structural imbalances persist, manifested in the outstripping growth of outbound tourism and the outflow of financial resources outside the country. It is shown that the development of the tourism industry requires an integrated approach, including increasing the efficiency of infrastructure, strengthening the competitiveness of the domestic tourism product and the active introduction of digital solutions.

The scientific novelty of the research lies in the integration of performance and demand indicators into a single analytical model, which makes it possible to substantiate the priority areas of tourism development. The practical significance of the results is related to the possibility of their use in the development of government programs and strategies for the development of the industry. As prospects for further research, it is advisable to consider the regional aspects of tourism development and the assessment of the impact of digitalization on tourist behavior.

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Утегенова Ж.С., Умбиталиев А.Д., Бимагамбетова Б.К., Евлюева М.Б.

ҚАЗАҚСТАНДАҒЫ ТУРИЗМДІ ДАМУДЫҢ ҚАЗІРГІ ТЕНДЕНЦИЯЛАРЫ: СҰРАНЫС, ӨНІМДІЛІК ЖӘНЕ ШЫҒЫСТАР

Аңдатпа

Мақалада қызмет көрсету саласын трансформациялау контекстінде Қазақстан Республикасының туристік секторын дамыту қарастырылған. Бір жұмыспен қамтылғанға жалпы қосылған құн арқылы өлшенетін еңбек өнімділігінің көрсеткіштері, сондай-ақ туристік сұраныс пен қаржы ағындарының динамикасы талданды. Туризмнің инфрақұрылымдық негізін қалыптастыратын экономикалық қызметтің негізгі түрлері бойынша өзгерістер қаралды. Зерттелетін кезеңде көрсетілген туристік қызметтер көлемінің кеңеюімен және келушілер санының ұлғаюымен сүйемелденетін қызметтер саласындағы еңбек өнімділігінің тұрақты өсуі байқалғаны анықталды. Ең үлкен оң динамика коммерциялық бағдарланған қызмет түрлеріне, сондай-ақ туристік саладағы экономикалық белсенділіктің өсуін көрсететін орналастыру қызметтерінің сегментіне тән екендігі анықталды. Туристік шығыстардың құрылымы талданды, нәтижесінде қаржы ресурстарының ағып кетуін көрсететін көшпелі туризм шығыстарының озыңқы ұлғаюы анықталды. Ішкі және келу туризмінің өсуіне қарамастан, қаржы ағындарын бөлуде теңгерімсіздік сақталатыны көрсетілген. Матрицалық модель түрінде жүйеленген туристік сектордың тиімділігін арттырудың негізгі бағыттары анықталды. Саланы дамыту инфрақұрылымды жетілдіруді, туристік өнімнің бәсекеге қабілеттілігін арттыруды және цифрлық технологияларды енгізуді қамтитын кешенді тәсілді талап ететіні көрсетілген. Туризмді дамыту стратегияларын әзірлеу үшін алынған нәтижелердің практикалық маңыздылығы негізделген және одан әрі зерттеу бағыттары анықталған.

Утегенова Ж.С., Умбиталиев А.Д., Бимагамбетова Б.К., Евлоева М.Б.

**СОВРЕМЕННЫЕ ТЕНДЕНЦИИ РАЗВИТИЯ ТУРИЗМА В КАЗАХСТАНЕ:
СПРОС, ПРОИЗВОДИТЕЛЬНОСТЬ И РАСХОДЫ**

Аннотация

В статье рассмотрено развитие туристического сектора Республики Казахстан в контексте трансформации сферы услуг. Проанализированы показатели производительности труда, измеряемые через валовую добавленную стоимость на одного занятого, а также динамика туристского спроса и финансовых потоков. Рассмотрены изменения по основным видам экономической деятельности, формирующим инфраструктурную основу туризма. Выявлено, что в исследуемый период наблюдается устойчивый рост производительности труда в сфере услуг, сопровождающийся расширением объемов оказанных туристских услуг и увеличением числа посетителей.

Определено, что наибольшая положительная динамика характерна для коммерчески ориентированных видов деятельности, а также для сегмента услуг размещения, что свидетельствует о росте экономической активности в туристической отрасли. Проанализирована структура туристских расходов, в результате чего выявлено опережающее увеличение расходов выездного туризма, указывающее на наличие утечки финансовых ресурсов. Показано, что несмотря на рост внутреннего и въездного туризма, сохраняется дисбаланс в распределении финансовых потоков.

Определены ключевые направления повышения эффективности туристического сектора, систематизированные в виде матричной модели. Показано, что развитие отрасли требует комплексного подхода, включающего совершенствование инфраструктуры, повышение конкурентоспособности туристского продукта и внедрение цифровых технологий. Обоснована практическая значимость полученных результатов для разработки стратегий развития туризма и определены направления дальнейших исследований.

