

## PROSPECTS FOR THE DEVELOPMENT OF TOURISM BUSINESS IN KAZAKHSTAN

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**ABSTRACT.** The article analyzes the current situation of the tourism business in Kazakhstan. Based on the development analysis, key problems in the functioning of the Kazakhstani tourism sector were identified and recommendations were given to overcome them.

The purpose of the scientific article is to identify problems, justify and develop recommendations for the development of the tourism industry in Kazakhstan.

The scientific and practical significance of this article is the formation, based on the results of the study, of directions that contribute to the improvement of the tourism industry in the country.

The research methodology was theoretical, empirical, general logical methods, including trend analysis, synthesis, generalization, comparison, and abstraction.

The work carried out research on various types of domestic tourism. Important sectoral problems in the development of companies in the field of tourism are identified based on the analysis of such parameters as the volume of services provided, location by form of ownership, size of enterprises, categories in cities and villages of the country. The paper also analyzes the indicators of the number of employees in the tourism industry and the level of average monthly nominal wages for various types of activities.

The main results of the research in this article are the following:

- considered the need to create effective tools for the development and support of the tourism industry, taking into account modern market trends;
- identified the need to provide infrastructure for tourist facilities;
- the need to improve the quality of tourism services provided was identified;
- the problem of the expediency of improving the quality and professionalism of the human resources of the industry is concretized;
- proposed measures to further strengthen the interaction between the state and entrepreneurship in the tourism sector;

The value of the study is the synthesis and analysis of the collected statistical information and, on its basis, the identification of the main problems that the tourism business faces in the new realities.

**KEYWORDS:** tourism services, tourism industry, tourism product, tourist flow..

## ҚАЗАҚСТАНДА ТУРИСТІК БИЗНЕСТІҢ ДАМУ БОЛАШАҒЫ

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**АНДАПТА.** Мақалада Қазақстандағы туристік бизнестің қазіргі жағдайы талданады. Даму талдауының негізінде қазақстандық туризм секторының қызметіндегі негізгі проблемалар анықталып, оларды жою бойынша ұсыныстар берілді.

Ғылыми мақаланың мақсаты – проблемаларды анықтау, Қазақстандағы туризм индустриясын дамыту бойынша ұсыныстарды негіздеу және әзірлеу.

Бұл мақаланың ғылыми-тәжірибелік маңыздылығы зерттеу нәтижелеріне сүйене отырып, еліміздегі туристік индустрияны жетілдіруге ықпал ететін бағыттарды қалыптастыруда.

Зерттеу әдістемесі теориялық, эмпирикалық, жалпы логикалық әдістер, соның ішінде трендтік талдау, синтез, жалпылау, салыстыру және абстракция болды.

Жұмыста ішкі туризмнің әртүрлі түрлері бойынша зерттеулер жүргізілді. Туризм саласындағы компаниялардың дамуындағы маңызды салалық проблемалар ұсынылатын қызметтердің көлемі, меншік түрлері бойынша орналасуы, кәсіпорындардың көлемі, еліміздің қалалары мен ауылдарындағы санаттары сияқты параметрлерді талдау негізінде анықталды. Жұмыста сонымен қатар туристік салада жұмыспен қамтылғандар санының көрсеткіштері және қызметтің әртүрлі түрлері бойынша орташа айлық атаулы жалақы деңгейі талданады.

Осы мақаладағы зерттеудің негізгі нәтижелері:

- қазіргі заманғы нарықтық тенденцияларды ескере отырып, туристік индустрияны дамыту мен қолдаудың тиімді құралдарын құру қажеттілігі қарастырылды;
- туристік нысандарды инфрақұрылыммен қамтамасыз ету қажеттілігі анықталды;
- ұсынылатын туристік қызметтердің сапасын арттыру қажеттілігі анықталды;
- саланың кадрлық әлеуетінің сапасы мен кәсіпқойлығын арттырудың орындылығы мәселесі көрсетілген;
- туризм саласындағы мемлекет пен кәсіпкерліктің өзара іс-қимылын одан әрі күшейту шаралары ұсынылды;

Зерттеудің құндылығы жинақталған статистикалық ақпаратты жалпылау мен талдауда және оның негізінде жаңа нақты жағдайда туристік бизнестің алдында тұрған негізгі проблемаларды анықтауда.

**ТҮЙІН СӨЗДЕР:** туристік қызмет, туристік индустрия, туристік өнім, туристік ағым.

## ПЕРСПЕКТИВЫ РАЗВИТИЯ ТУРИСТИЧЕСКОГО БИЗНЕСА В КАЗАХСТАНЕ

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**АННОТАЦИЯ.** В статье анализируется современное состояние туристического бизнеса в Казахстане. На основе анализа развития выявлены ключевые проблемы функционирования казахстанской туристической сферы и даны рекомендации по их преодолению.

Цель научной статьи – выявление проблем, обоснование и разработка рекомендаций по развитию туристской отрасли в Казахстане.

Научно-практическая значимость данной статьи заключается в формировании на основе результатов исследования направлений, способствующих совершенствованию туристской отрасли в стране.

Методологией исследования стали теоретические, эмпирические, общелогические методы, включающие анализ тенденций, синтез, обобщение, сравнение и абстрагирование.

В работе проведены исследования по различным видам внутреннего туризма. Выявлены важные отраслевые проблемы развития компаний в сфере туризма на основе анализа таких параметров, как объем предоставляемых услуг, расположение по формам собственности, размер предприятий, категории в городах и селах страны. В работе также проанализированы показатели численности занятых в туристской отрасли и уровень среднемесячной номинальной заработной платы по различным видам деятельности.

Основные результаты исследования в данной статье:

- рассмотрена необходимость создания эффективных инструментов развития и поддержки туристической

отрасли с учетом современных рыночных тенденций;

- выявлена необходимость обеспечения инфраструктурой туристических объектов;
- выявлена необходимость повышения качества предоставляемых туристических услуг;
- конкретизирована проблема целесообразности повышения качества и профессионализма кадрового потенциала отрасли;

- предложены меры по дальнейшему усилению взаимодействия государства и предпринимательства в сфере туризма;

Ценность исследования заключается в обобщении и анализе собранной статистической информации и на ее основе выявлении основных проблем, с которыми сталкивается туристический бизнес в новых реалиях..

**КЛЮЧЕВЫЕ СЛОВА:** туристические услуги, туристическая индустрия, туристический продукт, туристический поток.

**INTRODUCTION.** Relevance of the research topic. The most important problem of the current stage of the functioning of the tourism industry is the crisis of the industry caused by the COVID-19 pandemic, as quarantine measures interrupted the activities of companies engaged in the tourism business. In modern conditions, particular importance is attached to improving the quality of services provided and expanding the product portfolio.

The object of study in the article is the tourism industry.

Materials and methods. The article used information and analytical materials on the topic of the study, information from the Bureau of National Statistics and the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan, state programs and regulatory acts of the Republic of Kazakhstan on the regulation of the tourism industry and others.

When writing the work, general logical research methods were used, including methods of statistical processing of external and internal information, temporal and structural analysis, synthesis, induction, deduction. The authors also applied theoretical and empirical methods, including observation, description, comparison.

When studying the current state of tourism in Kazakhstan, time series of data were analyzed according to various criteria, which made it possible to evaluate key indicators from a retrospective perspective, identify trends, identify problems and develop recommendations for the further development of the tourism sector. The hypothetical-deductive method in the study was used as a methodological technique when putting forward an economic hypothesis and testing it by comparing it with the actual indicators of the development of the tourism industry.

The work analyzed the statistical data for the last six years. Synthesis, induction, deduction, generalization and abstraction have found application in the formation of conclusions and recommendations.

The theoretical basis of this article is the scientific

work of domestic and foreign scientists, researchers on the problems of the tourism business. When analyzing the activities of the tourism sector, the materials of the State Program for the Development of the Tourism Industry, the draft Concept for the Development of the Tourism Industry of the Republic of Kazakhstan until 2026 and the operational data of the World Tourism Organization were used (UNWTO.)

#### **MATERIALS AND METHODS OF RESEARCH.**

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Figure 1 - Rating of the 10 best countries according to the World Tourism Organization (UNWTO)

Note: compiled by the author according to the source [3]

materials of the State Program for the Development of the Tourism Industry, the draft Concept for the Development of the Tourism Industry of the Republic of Kazakhstan until 2026 and the operational data of the World Tourism Organization were used.

Despite the fact that considerable attention is paid to the development of the tourism business by modern scientific thought, at the same time, many aspects remain insufficiently studied. In particular, the special significance of the activities of tourism entrepreneurship has emerged after the COVID-19 corona crisis. We saw that thanks to the great potential, state support, efficiency and flexibility of business processes in companies engaged in the field of tourism, the tourism industry has managed not only to regain its previous positions, but also to reach a new level of development in the post-pandemic period.

**RESULTS AND THEIR DISCUSSION.** Modern processes of globalization and integration of the Republic of Kazakhstan with the world community give impetus to the development of various spheres of the national economy. The tourism industry is one of the priority areas for the development of the economy of Kazakhstan. The country has unique natural conditions for the development of various types of tourism from educational with excursions to historical and cultural sites to active, extreme types of tourism. Today, ecotourism is very popular, as well as fishing and hunting, including national types of hunting.

A breakthrough in this area requires competent and well-coordinated work of state authorities at all levels, business entities and investors. This approach will contribute to the implementation of large-scale projects, solving problematic issues and promoting tourism to a new level of development.

The coronavirus pandemic caused significant damage to the entire global economy, but the greatest losses in global GDP were due to the crisis in the tourism industry. Today, international tourism

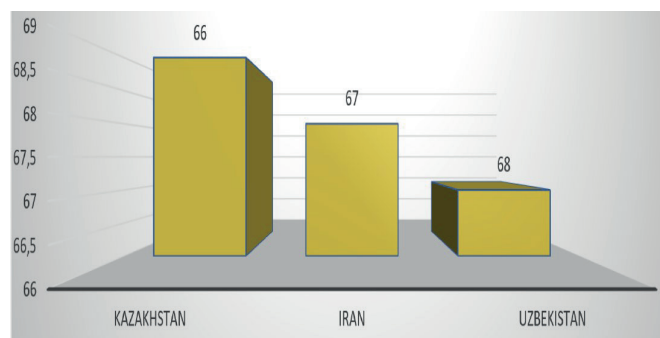


Figure 2 – Kazakhstan in the global tourism ranking of the GCI WEF 2023

Note: compiled by the author from source [4].

is gradually reviving, and by 2024 its level will be able to reach 90% of the pre-pandemic period. Thus, according to the World Tourism Organization (UNWTO), until September 2023, the number of international tourist trips was made by about 975 million people. This is an increase of 38 percent compared to 2022. [1].

At the same time, according to the Bureau of National Statistics of the Agency for Strategic Planning and Reform, the number of international tourist arrivals in the Republic of Kazakhstan in 2022 amounted to 4.7 million people, or 0.5% of the global total. This figure in 2019 was 8.7 million and increased by 182% compared to the same period in 2021 - from 41 million to 117 million [2].

The 2023 World Tourism Organization (UNWTO) ranking highlighted the top 10 countries for tourism (Figure 1)

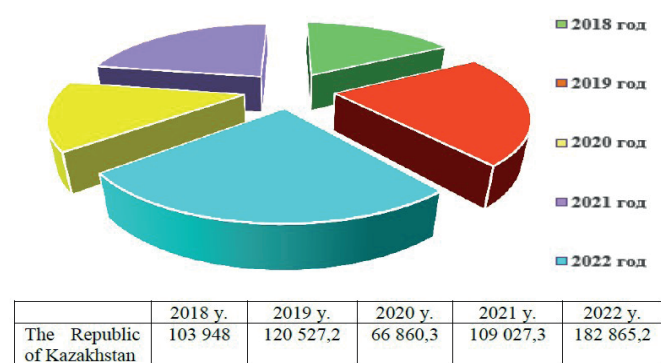
The main criteria for entering the top 100 countries are such as the volume of foreign direct investment, GDP per capita, tourism income. In addition, the quality and standard of living, social responsibility, culture, openness of entrepreneurship, etc. are taken into account [3]. According to the global tourism rating of the GCI WEF for 2023, Kazakhstan took 66th position out of 117 countries, ahead of Iran, Uzbekistan and Belarus (Figure 2).

Countries such as Russia, Zambia, and Lebanon were ahead. The overall score in this rating for Kazakhstan was 4.4 points out of 100 possible. But the fact that Kazakhstan is included in the list of the hundred best countries for tourism is positive.

Today, the main priority areas of tourism are ecotourism, agrotourism, hunting tourism, ethnographic tourism, medical tourism, children's and youth tourism, and business tourism.

Kazakhstan has sites included in the UNESCO World Heritage List, three of which are cultural and two are natural heritage. But to increase the competitiveness of the tourism business, it is necessary to increase the level of service, develop infrastructure, transport security and accessibility.





**Figure 3 - The volume of services provided by accommodation places for the period 2018-2022, million tenge**

Note: Compiled by the authors according to the Bureau of National Statistics ASPR RK [2]

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

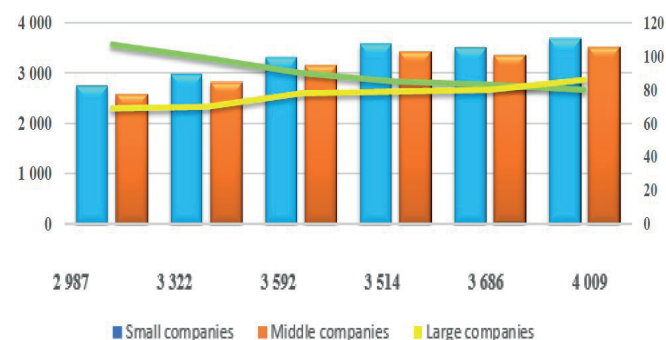
The state attaches great importance to the development of the tourism industry in the country. The main program document for the development of the economy of the Republic of Kazakhstan – the “Kazakhstan 2050” Strategy – contributed to the formation of the tourism business and the rational use of recreational potential [5].

In 2019, the State Program for the Development of the Tourism Industry of the Republic of Kazakhstan for 2019-2025 was approved, where the goal was set to increase the share of tourism in the country’s GDP to 8% in 2025 [6].

In September 2022, the Ministry of Culture and Sports proposed for consideration a draft Concept for the development of the tourism industry of the Republic of Kazakhstan until 2026, which highlights the tourism business as one of the national priorities for the development of the country’s economy [7].

As part of the Business Road Map 2025, 7 projects in the tourism sector were subsidized for a loan amount of 52.9 million tenge. [8]. Under the “Economy of Simple Things” program - 2 projects worth 2.1 billion tenge. (construction of the “Wyndham Garden” hotel, reconstruction of the “Ak Zhelken” boarding house) [9].

To form a modern and competitive tourism industry in the country, an institutional, methodological and organizational framework is needed. In this regard, this Program was coordinated with the key areas of



**Figure 4 - Dynamics of the distribution of placements by the size of enterprises in the Republic of Kazakhstan for the period 2017-2022, units**

Note: compiled by the authors according to the Bureau of National Statistics ASPR RK [2]

economic diversification, which were presented in the Strategic Development Plan of the Republic of Kazakhstan until 2025 [10].

The program also defines the following main tasks:

- development of tourism resources;
- provision of infrastructure to tourist destinations;
- increasing the availability and quality of tourism services;
- creation of a favorable tourist climate;
- formation of an effective system for promoting the potential of the tourism industry in the international and domestic markets;
- improvement of the tourism management and monitoring system.

In order to determine the degree of development of tourism in Kazakhstan and identify the main problems, we will analyze the tourism industry for the period 2018-2022. Let's start with analyzing data on the volume of services provided by placements (Figure 3).

Figure 3 clearly shows that in 2019 there was an increase in the value of services provided in the tourism industry to 120 527,2 million tenge. Then, the volume of services provided by accommodation places sharply decreased from 2020 due to quarantine measures from 120,527.2 to 66,860.3 million tenge, respectively, which amounted to 55.47%. From 2021 to 2022, there has been an increase in the volume of tourist services. industry to 182 865,2 million tenge. However, such an increase, according to analysts, is not associated with an improvement in the tourism cluster in the country [11].

Consider how the distribution of placements by the size of enterprises in cities and villages from 2017 to 2022 took place according to table 1.

Figure 3 clearly shows that in 2019 there was

an increase in the value of services provided in the tourism industry to 120,527.2 million tenge. Then, the volume of services provided by accommodation places has sharply decreased since 2020 due to quarantine measures from 120,527.2 to 66,860.3 million tenge, respectively, which amounted to 55.47%. From 2021 to 2022, there is a gradual increase in the volume of tourism industry services to 182,865.2 million tenge.

Table 1 shows that the main share of the distribution of placements in cities and villages fell on small businesses. For example, in 2017, the total number of hotels was 2,987 units, of which the share of small companies was 2,818 units or 94.3%. For the period 2017 - 2022 the total number of hotels increased to 4,009 units, including the share of small businesses amounted to 95.5 % (Figure 3).

It should be noted that in 2022, the largest number of placements were in cities – 57.6%. Also, in cities, small businesses are more involved in the hotel business. If in 2017 small businesses in the hotel sector of cities accounted for 93.8%, then in 2022 - already 95.88%. The number of medium-sized companies in the city hotel business decreased by 0.7% during the study period, and the share of large companies decreased by 0.4%.

In villages, the number of rural hotels was 1,273 units in 2017 or 42.60%. By 2022, the number of hotels in villages increased to 1,700 units, the bulk of which fell on small enterprises. If in 2017 the share of small companies in the hotel business in villages was 95.1%, then in 2022 this value increased to 95.9%. The share of medium-sized companies engaged in accommodation in villages reached 2.4% in 2017, but in 2022 its value decreased and amounted to only 1.7%. As for large entities, their

share decreased from 2.5% in 2022 to 2.1% in 2017.

Next, consider how placements are distributed by type of ownership (Table 3).

Table 2 shows that the largest share in the distribution of placements according to the criterion - form of ownership - fell on private property. Moreover, for the period from 2017 to 2022. the number of privately-owned accommodation places increased by 134.31%, which indicates an increased interest of entrepreneurs in developing business in the tourism sector. Property of other states, their legal entities and citizens, which over the same period increased from 35 to 50 units and amounted to 142.86%.

Figure 5 graphically shows data on the distribution of placements, depending on the form of ownership.

In order to understand the demand for tourist services, we will analyze the change in the number of visitors served in places of accommodation by category. Table 3 shows the distribution of placements by category.

According to Table 3, it can be seen that in 2022 the main share of tourist accommodation places will be in places without categories - 52.41% and, that is, in the most budget places. Also, a significant share is occupied by other placements – 44.55%.

Figure 6 clearly reflects the data in Table 3. Thus, the share of accommodation in 5-star hotels remains very low - less than one percent. The distribution of accommodation in 3-star hotels decreased by 3 quarters and their share amounted to 25% during the analyzed period. To improve the quality and investment attractiveness of the tourism industry, in addition to the wide range of services provided, attracting clientele and developing infrastructure,

**Table 1 - Distribution of placements by size of enterprises of the republic of Kazakhstan, units**

Business entities	2017	2018	2019	2020	2021	2022	2022/2017, %
Total							
Total	2 987	3 322	3 592	3 514	3 686	4 009	134,21
Small businesses	2 818	3 154	3 428	3 351	3 520	3828	135,84
Medium enterprises	99	90	85	83	80	87	87,9
Large enterprises	70	78	79	80	86	93	132,86
City							
Total	1 714	1 909	2 026	2 014	2096	2309	134,71
Small businesses	1 608	1 801	1 919	1 911	1991	2193	136,38
Medium enterprises	68	61	61	57	53	58	85,29
Large enterprises	38	47	46	46	52	57	150
Village							
Total	1 273	1 413	1 566	1 500	1590	1700	133,54
Small businesses	1 210	1 353	1 509	1 440	1529	1630	134,71
Medium enterprises	31	29	24	26	27	29	93,55
Large enterprises	32	31	33	34	34	36	112,5
Note: compiled by the authors according to the Bureau of National Statistics ASPR RK [2]							

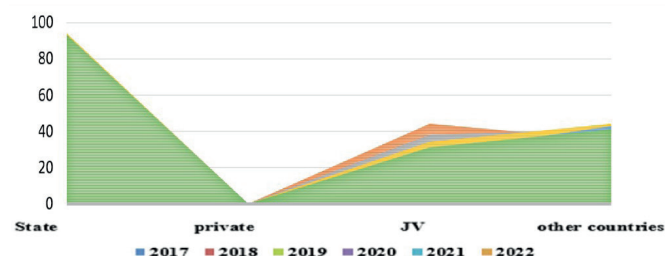


Figure 5 - Dynamics of the distribution of placements by form of ownership in the Republic of Kazakhstan, for the period 2017-2022, units

Note: compiled by the authors according to the Bureau of National Statistics ASPR RK [2]

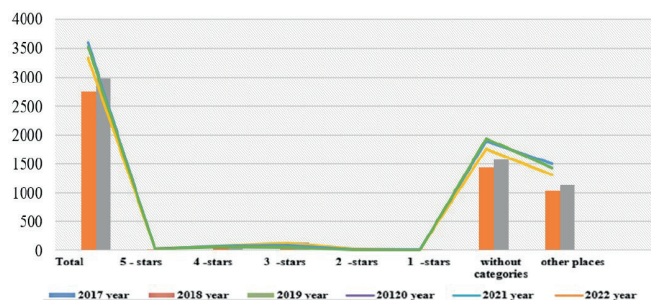


Figure 6-Dynamics of the distribution of placements in Kazakhstan by category for the period 2017-2022, tenge

Note: compiled by the authors according to the Bureau of National Statistics ASPR RK [2]

personnel play an important role. In accordance with the National Entrepreneurship Development Project in the Republic of Kazakhstan, it is planned to create 170 thousand jobs by 2025.

Let us analyze the main indicators of the development of labor resources in the tourism sector in Kazakhstan for the period 01.01.2018 - 01.01.2022. Table 4 shows the dynamics of the number of workers employed in the activities of tourism business companies by various types.

Data for 2022 on the number of workers employed in the tourism sector in the BNS ASPR of the Republic of Kazakhstan have not been published

The data in Table 4 demonstrate that the growth in the share of employees employed in the activities of companies organizing recreation, entertainment, culture and sports tends to increase, which exceeded the pre-pandemic period.

Considering the indicators of changes in the number of personnel in the tourism industry in Figure 7, one can notice that temporary accommodation services are in second place in terms of employment. The slow growth in the number of other areas of activity may be due to the fact that work in the field of tourism is specific and is characterized as nonprestigious and underpaid.

This may also be due to the fact that in Kazakhstan there is a shortage of highly qualified specialists in

this industry. The solution to this problem depends directly on the economic development of the industry and the country's economy as a whole [12].

A similar trend is observed in the global tourism market. Thus, in the tourism industry, there was a decrease in jobs by 192 million people from 01.01.2018 to 01.01.2022, which is 8% [13].

The development of human resources and their competent management provides competitive advantages in this area. One of the motivational tools in working with personnel is the system of remuneration. Table 5 shows the change in the wages of tourism workers for the period 01.01.2018 - 01.01.2022.

Data for 2022 on the number of workers employed in the tourism sector in the BNS ASPR of the Republic of Kazakhstan have not been published.

Table 5 shows that the share of wages increased by an average of 44%. But this growth is associated with rising inflation in the country. This is not the only factor affecting the change in average wages.

Figure 8 shows the dynamics of changes in the average monthly nominal wages of personnel in the tourism industry.

Chart 8 shows that the largest average monthly salary in 2021 was observed among employees providing services in the sanatorium and resort sector. The level of wages for temporary residence

Table 2 - Distribution of placements by form of ownership in the Republic of Kazakhstan, units

	2017	2018	2019	2020	2021	2022	2022/2017, %
Total	2 987	3 322	3 592	3 514	3 686	4009	134,21
state property	75	77	94	93	93	95	126,67
private property	2 877	3 204	3 454	3 378	3 552	3864	134,31
ownership of joint ventures with foreign participation	44	38	34	28	31	32	72,72
property of other states, their legal entities and citizens	35	41	44	43	41	50	142,86

Note: compiled by the authors according to the Bureau of National Statistics ASPR RK [2]

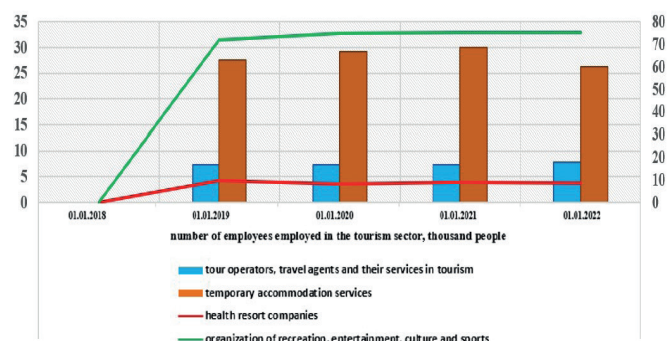


Figure 7 - Dynamics of the number of employees employed in the tourism sector in the Republic of Kazakhstan for the period 01.01.2018 - 01.01.2022, thousand people

Note: compiled by the authors according to the Bureau of National Statistics ASPR RK [2]

services is slightly inferior. Next come tour operators, travel agents and other services, as well as organizers of recreation, entertainment, culture and sports.

The low wages are caused by a number of problems. First of all, the level of salary depends on the level of qualification of the employee, and in the tourism industry, according to experts, there is a low level of professionalism, and employees do not

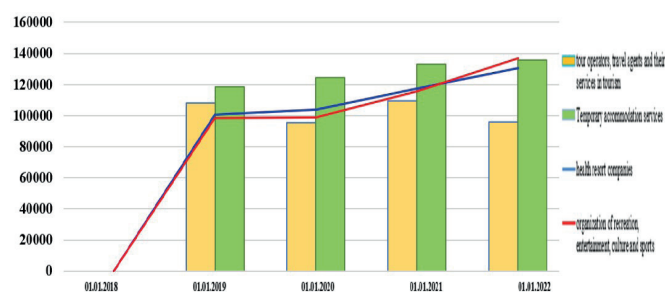


Figure 8 - Dynamics of the average monthly nominal wages of employees of the tourism business in Kazakhstan for the period 01.01.2018 - 01.01.2022, tenge

Note: compiled by the authors according to the Bureau of National Statistics ASPR RK [2]

have the appropriate education [14].

Secondly, this is the level of wages correlated with the number of services sold and their cost.

And finally, thirdly, in the tourism business, by type of activity, there is an uneven amount of wages. Thus, employees of the airport service have higher earnings than in other structures of this industry. In addition, low wages are observed among young women. In hotels, the average wage level is 40% of

Table 3 - Distribution of placements in the Republic of Kazakhstan by categories, units

	2017	2018	2019	2020	2021	2022	2022/2017, %
Total	2 987	3 322	3 592	3 514	3 686	4009	134,21
5 - stars	22	23	24	26	26	25	113,64
4 - stars	87	79	71	64	64	58	66,67
3 - stars	132	120	85	49	48	33	25
2 - stars	18	24	15	7	6	4	22,22
1 - stars	14	14	10	4	3	2	14,28
uncategorized	1 578	1 753	1 890	1 936	1 997	2101	133,14
other placements	1 136	1 309	1 497	1 428	1 542	1786	157,22

Note: compiled by the authors according to the Bureau of National Statistics ASPR RK [2]

the wage level in the tourism industry, and for low-skilled workers, respectively, only 20%. All of these factors lead to high employee turnover and are reasons for layoffs.

Consequently, the tourism business is one of the most important components of the modern economic space, a lever for improving the economy of Kazakhstan and increasing its competitive advantages.

**CONCLUSION.** Based on the study, the following conclusions and proposals were developed:

Firstly, tourism is a highly profitable and investment-attractive type of business, since the tourism sector requires insignificant costs, and in Kazakhstan this industry is gradually recovering and

increasing its pace. However, the tourism industry requires solving many problems, since coordinated interaction with a huge number of related industries will allow the tourism industry to get a multiplier effect [15,16].

The state takes an active part in these issues. The head of government gave instructions to support tourism in Kazakhstan. Thus, it is planned to subsidize the costs of tour operators for foreign tourists, reimburse part of the costs of business entities in the construction, reconstruction of tourist facilities, the purchase of equipment and machinery for ski resorts, the construction of roadside service facilities for the acquisition tourist buses, etc.

Secondly, on the timely provision of engineering



**Table 4 - Number of employees by type of activity employed in the tourism sector of the Republic of Kazakhstan, thousand people**

Kind of activity	Number of employees employed in the tourism sector, thousand people					Rates of growth 2022/2018, %
	01.01. 2018 y.	01.01. 2019 y.	01.01. 2020 y.	01.01. 2021 y.	01.01. 2022 y.	
Activities of tour operators, travel agents and services in tourism	7,3	7,4	7,4	7,8	6,0	82,19
Temporary accommodation services	27,6	29,2	30,0	26,3	27,3	98,91
Activities of health resort companies	9,6	8,0	8,8	8,6	8,1	84,38
Activities for the organization of recreation, entertainment, culture and sports	71,8	74,9	75,4	75,3	75,7	105,43
Note: compiled from source [2] Data for 2022 on the number of workers employed in the tourism sector in the BNS ASPR of the Republic of Kazakhstan have not been published						

infrastructure to tourist facilities. The analysis showed that in the Republic of Kazakhstan there is a low level of improvement of tourist cities and historical sites, an imbalance in the hotel sector with accommodation places, poor condition of roads and roadside services, poor development of leisure and entertainment for tourists, insufficient information support for tourists, poor development of transport infrastructure (lack of signs, directions or passages, information about cultural heritage sites, calendars of cultural events), etc. Indeed, transport is a link between individual elements of the tourism industry and contributes to its faster development. In addition, the transport infrastructure can be used both for organizing shopping tourism, as well as in excursion routes, and in everyday life by ordinary citizens without tourism purposes/ Meanwhile, its development depends entirely on

the condition of the roads and the availability of proper maintenance of tourist vehicles. It should be noted that a number of elements of the transport and communication infrastructure are available in the country, but their presence is clearly not enough for the active development of tourism, and new centers of international importance do not have such infrastructure at all.

Thirdly, due to the fact that the formation of the tourism variable occurs on the basis of natural and natural resources in economic turnover, and regulates the processes of creating new jobs, development, attracting the growth of tax revenues to the budget, then problems in the context of globalization.

Fourth, the issues of improving the quality of services in the industry must be addressed comprehensively, from the marketing promotion

**Table 5 - Main indicators of the average monthly nominal wage in the tourism business in Kazakhstan**

Type of activity in the field of tourism business	Average monthly nominal wage, tenge					Rates of growth 2022/2018, %
	01.01. 2018 y.	01.01. 2019 y.	01.01. 2010 y.	01.01. 2021 y.	01.01. 2022 y.	
tour operators, travel agents and services in tourism	108 152	95 341	109 265	95 959	132 254	122,29
temporary accommodation services	118 606	124 217	133 240	135 957	176 814	149,08
health resort companies	88 163	90 658	102 654	114 386	137 766	156,26
organization of recreation, entertainment, culture and sports	86208	86 510	101 158	119 597	128 106	148,60
Note: compiled according to the source [2] Data for 2022 on the number of workers employed in the tourism sector in the BNS ASPR of the Republic of Kazakhstan have not been published.						

of tourist destinations to the provision of individual services at the request of tourists.

Fifthly, it is known that the quality of service depends on the professional training of workers in the industry. Highly qualified personnel are one of the most effective tools for increasing the competitiveness of the industry. The process of interaction between employees and customers is a key task for managers of travel companies related to the quality of service. Despite the huge offer from the leading universities of the country of specialists for the tourism industry, there is a low level of provision with operational personnel, associated with low pay and low prestige of positions. Low entry barriers and staff turnover is also one of the problems of modern domestic tourism. All this comes from the uneven time schedule of the main developing segments of tourism, such as labor relations, the system of remuneration for work, the system of education and training of personnel, as well as the attitude towards the private sector of the economy. The staff must be motivated to a high level of service, possess the necessary competencies, skills and knowledge, to have access to information in order to provide them with high-quality services,

taking into account the needs of customers.

Tourism is the world's largest employer today, so there is a growing need for leaders on the ground to address human capital challenges and for employees to be empowered to perform at their best. Therefore, the most important today should be given to the training of professionals in the field of tourism, as well as the use of modern management tools.

Summarizing all of the above, the main reasons hindering the development of the tourism industry in Kazakhstan were identified:

- insufficient development of transport, engineering, social infrastructure,
- low level of service in places of accommodation,
- low level of qualified personnel in the tourism sector,
- non-compliance of educational programs with market requirements and the needs of employers,
- imperfection of state support instruments.

Eliminating these shortcomings can play a strategic and decisive role in efforts to improve the quality of tourism products and improve Kazakhstan's position in the world market.

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