

**Zh. Zh. Belgibayeva<sup>1</sup>, Sh. M. Nadyrov<sup>1</sup>, G. O. Zhanguitina<sup>2</sup>,  
A. K. Belgibayev<sup>2</sup>, A. A. Belgibayev<sup>3</sup>**

<sup>1</sup>Al-Farabi Kazakh National University, Almaty, Kazakhstan;

<sup>2</sup>Almaty Technological University, Almaty, Kazakhstan;

<sup>3</sup>Kazakh-Swiss Institute of Tourism and Hotel Business, Almaty, Kazakhstan.

E-mail: Zhanat58@mail.ru, scharipjan@mail.ru, eib@mail.ru,

Belgibayev@mail.ru, belgibaev.92@mail.ru

## **TOURIST FLOWS OF KAZAKHSTAN: STATISTICS, GEOGRAPHY, TRENDS**

**Abstract.** The article covers the issues related to the study of the tourist flow as a population of people temporarily moving to Kazakhstan and traveling from Kazakhstan abroad for tourism. The problems of accounting and analysis of tourist flows occupy a central place in the tourism economy and are still polemical.

During the research, the following results were obtained: firstly, the tourist flow as an economic indicator, notion, and process was investigated; secondly, the analysis of tourist flows in terms of structural changes, dynamics, geographical signs; thirdly, the growth prospects of inbound tourist flows based on the results of the SWOT analysis were justified.

**Key words:** tourism, budget, resource, outbound and inbound flow, visitor, tourist, migration, trip, infrastructure, analysis.

The tourist flow is not only a statistical value characterizing, on the one hand, the ratio of arrivals and departures, tourist expenses and incomes, but, on the other hand, is a very complex concept in structural terms. Quantitative and qualitative indicators of the tourist flow are formed affected by several natural, economic, political, social, geographical factors and indicate the country's tourist attractiveness, the efficient use of tourism opportunities and the demand creation for a national tourism product. There is a proportional relationship: the higher the demand for a national tourism product, the greater the volume of inbound tourist flow.

Statistics on tourist flows are needed to create development scenarios, identify volumetric indicators of the industry effectiveness, and calculate financial revenues to the budgets of all levels of public administration.

The aim of the study is to form a holistic integral representation of the tourist flow as a statistical value, a business process, and a complex notion.

Following the aim, the following objectives were formulated:

- to study and disclose the features of the formation of inbound and outbound flows in Kazakhstan;
- to assess comprehensively the inbound and outbound flows with the analysis of structural changes, dynamics, and geography based on data from the Committee on Statistics;
- to spot trends in the transformation of tourist flows based on a SWOT analysis taking into account the current situation on world capital markets.

The methodological basis of the research included the dialectic method, which considers the tourist flow not as something frozen, but as a process in which radical changes occur under the influence of factors of the external and internal environment. There is a need for scientific management of tourist flows based on a process approach that converts resources into a product with high added value and cost for the consumer. The relevance of the studies of tourist flows based on innovative methods of their analysis and

forecasting is emphasized in the works of such famous foreign and domestic scholars as A.Yu. Alexandrova, M.S. Oborin, A.A. Saryan, A.A. Gudkov, I.P. Kulgachev, V.A. Lepeshkin, E.A. Manteifel, M.R. Smykova, A.A. Kairova et al. [1-6].

Meanwhile, it is difficult to estimate the tourist flow by quantitative and qualitative indicators for the following reasons. As a rule, the arrival and departure of residents and non-residents are registered by the border service agencies of the National Security Committee of the Republic of Kazakhstan when crossing the state border. Additionally, data on visitors represented by collective accommodation facilities are being studied. However, some visitors choose individual accommodation facilities, guided by economic considerations. For this reason, when analyzing the inbound and outbound flows, it is recommended to study the dynamics of arrivals and departures, additionally considering the purpose of travel and only then examine the tourist flow.

This sequence of scientific research on tourist flows is because companies of the transport infrastructure, hotel and restaurant complex should be able to receive and serve all visitors regardless of the purpose of their trip. As usual, in places of temporary stay, people somehow try to get acquainted with local sights, traditions, and customs, visit restaurants and cafes of national cuisine, make purchases in shops and thus affect the income generation of the local population. In their free time from work and study, they can take weekend tours, contact travel agencies, use tourism resources.

Based on the foregoing, it can be argued that the activation of tourism activities and the increase in tourism attractiveness of Kazakhstan are evidenced by indicators characterizing the dynamics, structural changes, and geography of inbound and outbound flows. Table 1 presents statistics on the number of visitors to both arriving and departure traffic.

Table 1 – Dynamics of visitors by inbound and outbound flows in Kazakhstan in 2000–2018, people

Years	2000	2005	2010	2015	2016	2017	2018
The number of outbound visitors	1 246 731	2 974 869	7 412 300	11 302 476	9 755 593	10 260 813	10 646 241
The number of inbound visitors	1 682 548	5 990 691	4 712 657	6 430 158	6 509 390	7 701 196	8 789 314
<i>Note:</i> compiled according to the sources [7-10]. Data of the Border Service Agencies of the National Security Committee of the Republic of Kazakhstan.							

As the data in table 1 show, in 2018 the number of visitors in the outbound flow increased compared to 2000 by 8.53 times, or by 9,399,510 people. According to the inbound flow for the analyzed period, there is also an obvious tendency to increase from 1 682 548 to 8 789 314 people, or 5.22 times.

However, if compared the outbound and inbound flows, it turns out that the number of outbound visitors is much larger compared to the inbound flow. So, in 2018, 8 789 314 people visited Kazakhstan, and 10 646 241 people left Kazakhstan. The difference between these two indicators was 1 856 927 people.

The ratio between the numbers of inbound and outbound flows in 2018 was 0.82. The predominance of departures over arrivals is accompanied by the outflow of financial resources abroad. For this reason, it is an urgent need to intensify inbound flows.

We can state the fact that, on the one hand, Kazakhstan is becoming more recognizable in world space. On the other hand, Kazakhstanis also possess information, have money, show interest in studying the culture, traditions, gastronomic features of other nations, travel with different goals to countries both near and far abroad. The scope of labor and educational migration is expanding.

According to tables 2, 3, it is clear that in 2018, 81.40% of visitors left Kazakhstan for personal goals, and 18.60% for business and professional purposes. According to the inbound flow, 86.08% of visitors entered the country for personal goals and 13.92% - for business and professional purposes.

In 2018, for tourism, Kazakhstan received 65 822 people or 0.7% of the number of visitors of inbound flow, and 181 260 people or 1.7% of the number of visitors of outbound flow left Kazakhstan. The analyzed statistics are characterized by some conventionality since it is difficult to distinguish travel purposes. Tourism can be combined with private and business goals or transit.

Table 2 – The number of visitors of outbound flow by the purpose of the trip, people

Indicators	2014	2015	2016	2017	2018
The number of visitors on the outbound flow – total	10 449 972	11 302 476	9 755 593	10 260 813	10 646 241
Including					
business and professional	1 748 579	1 888 985	1 922 536	1 962 923	1 979 431
personal	8 701 393	9 413 491	7 833 057	8 297 890	8 666 810
of them					
tourism	287 526	200 434	124 101	167 440	181 260
private	8 404 701	9 208 274	7 666 055	8 074 660	8 452 029
transit	9166	4783	42 901	55 790	33 521
<i>Note:</i> compiled according to the source [10].					

Table 3 – The number of visitors of inbound flow by the purpose of the trip, people

Indicators	2014	2015	2016	2017	2018
The number of visitors on the inbound flow – total	6 332 734	6 430 158	6 509 390	7 701 196	8 789 314
Including					
business and professional	1 178 900	1 044 743	1 096 899	1 186 542	1 223 324
personal	5 153 834	5 385 415	5 412 491	6 514 654	7 565 990
of them					
tourism	61 953	54 374	56 228	81 635	65 822
private	4 439 556	4 839 040	4814 757	5 853 816	6 865 255
transit	652 325	492 002	541 507	579 203	634 913
<i>Note:</i> compiled according to the source [10].					

It should be noted that the geography of departures and arrivals is expanding every year. According to the Committee on Statistics of the Ministry of National Economy of Kazakhstan, exchanges were observed both with CIS countries and far abroad. In 2018, the CIS countries accounted for 93.03% of inbound visitors and 89.69% of outbound visitors. The share of countries outside the CIS in terms of inbound flow is 6.97%, and 10.31% in outbound flow, respectively.

Table 4 – Geography of visitors by outbound and inbound flows in Kazakhstan in 2018

Indicators	Inbound flow		Outbound flow	
	persons	percent	persons	percent
Total visitors	8 789 314	100,0	10 646 241	100,0
Including				
CIS countries	8 177 101	93,03	9 549 292	89,69
Out of CIS countries	612 213	6,97	1 096 949	10,31
<i>Note:</i> compiled according to the source [10].				

The CIS countries such as the Russian Federation, Kyrgyzstan, and Uzbekistan are among the leaders in the inbound flow. The number of visitors from the above-mentioned three states is 7 416 957 people or 84.39% of the total number of arrivals. From countries outside the CIS, countries such as Germany, Turkey, China, the USA, Mongolia, etc., are distinguished in inbound flow.

The CIS countries such as the Russian Federation, Kyrgyzstan, and Uzbekistan are again leaders in terms of departures. 9 406 548 Kazakhstanis, or 88.35% of the total number of visitors to the outbound flow, visited these neighboring states. Among countries out of the CIS, Kazakhstanis preferred to travel to Turkey, China, the United Arab Emirates, Egypt, Germany, Georgia, South Korea, and other countries.

Moreover, the undisputed leader in the number of outbound trips is Turkey, which attracts Kazakhstanis with the level of service, national cuisine, historical monuments, developed transport communications, a favorable warm climate and an ability to choose a particular location depending on the availability of financial resources.

Between China and Kazakhstan, long-term mutually beneficial economic partnerships have been developed. Kazakhstan people visit neighboring China for various purposes: recreation, treatment, business and professional, conducting sanatory preventive procedures, studying at universities, shopping, getting acquainted with gastronomic dishes famous all over the world, visiting numerous cultural monuments of antiquity, participating in tea and other ceremonies. In the neighboring state, there is a large diaspora of Kazakhs who have always dreamed of visiting their historic homeland.

Consumer preferences of Kazakhstanis are explained by the fact that friendships have long developed between the population of the Russian Federation, Kyrgyzstan, Uzbekistan, and Kazakhstan. The absence of language and other barriers contributes to the intensive exchange of outbound and inbound flows between these countries.

A crucial fact is that in recent years the infrastructure in all these countries has noticeably improved, comfortable places of accommodation and food have been built, and the quality of tourism services provided has enhanced. Transport links have been established. Qualified personnel is being trained for the tourism industry.

So, in Kazakhstan in 2018, there were 3322 units of accommodation, the one-time capacity was 168 603 beds. Structurally, there were 23 five-star hotels in the country, 79 four-star hotels, 120 three-star hotels, 24 two-star hotels, 14 one-star hotels, 1,753 unrated hotels, and 1,309 other accommodations. They served 5 526 864 people, including 830 922 non-residents and 4 695 942 residents. The occupancy rate of hotel beds in 2018 averaged 23.2%. Food services in 2018 were provided by 17 822 public catering enterprises [10, p.25-27,40].

If necessary, guests can use individual accommodation facilities. In any case, depending on preferences and financial opportunities, they will be offered various options for accommodation and meals.

Thus, it can be noted that certain conditions have been created in Kazakhstan and there is an appropriate material and technical base for receiving and servicing foreign visitors. To improve the situation in the market of tourism services, increase the competitiveness of the domestic tourism product, it is necessary to further advance it and improve the quality of services according to the world standards. Close attention deserves the question of the construction and functioning of comfortable accommodation in the countryside for the development of the current popular agrarian tourism.

Entrepreneurs in the tourism industry have studied international experience, international standards of service, they are actively engaged in advertising and positioning of the domestic tourism product. For this purpose, various means and tools of marketing communication are used: the Internet, television, radio, exhibitions, presentations, and the production of souvenirs with national symbols.

The works of domestic and foreign scholars are devoted to the development of tourism, who emphasize the relevance and importance of the topic of the research [11-21]. They note that the Russian Federation and Kazakhstan have rich tourism resources and opportunities for the development of all types of tourism without exception: cultural, educational, entertaining, ethnic, ecological, agrarian, extreme, business, medical and health, event, coastal, sports, international, space.

Kazakhstan can offer visitors from near and far abroad tourism products that are unique and exotic. Here you can not only admire the beautiful natural scenery, take hydrotherapeutic procedures in the summertime at the popular healing lake Alakol, in winter go skiing in the famous Chimbulak ski resort and ice skate on the high-mountain Medeu skating rink built during the planned economy, eat dishes of national cuisine, taste environmentally friendly products, improve health in medical institutions, see tourism attractions, get acquainted with the traditions of the peoples of Kazakhstan, but also take a space trip from the world's first Baikonur cosmodrome.

The study of the foreign experience of countries with a developed tourism industry has shown that tourism is becoming widespread. Outbound and inbound flows tend to increase. In the context of globalization, Kazakhstan is integrating into the world community. A neighborhood with China, Russia, Kyrgyzstan, and Uzbekistan allows developing cross-border tourism and implementing joint mutually beneficial projects. The geographical location of Kazakhstan provides certain competitive advantages.

To visualize the situation in the market, guide producers and consumers of tourism services, to develop a tourism development strategy in a country, region and a specific area, it is advisable to use a SWOT analysis.

In our case, the uniqueness of tourist destinations, a favorable climate, traditions of hospitality, an original culture, national cuisine, quality foodstuffs, support from the state are recognized as strengths and will undoubtedly arouse interest among potential visitors.

Weaknesses include insufficient service, poor transport infrastructure, lack of qualified specialists, relatively high prices, lagging behind developed countries in advertising and information, which inhibits the development of tourism and prevents the flow of visitors.

The development of new markets and segments, expanding the range of tourism services, improving the quality and competitiveness of tourism services, attracting foreign and domestic investors, increasing incomes and the level of employment, ensuring the economic accessibility of tourism products to wide layers of residents and non-residents, a well-constructed marketing strategy will give a new impetus and open up new opportunities in the tourism development.

Finally, it is advisable to react swiftly to the threats that place tourism at a disadvantage and caused by increased competitive pressure, reduced financial solvency of potential visitors, natural disasters and worsened epidemiological conditions in tourism centers, exchange rate fluctuations, worsened socio-political conditions in Kazakhstan and the world generally.

Competition in the tourism market is intensifying. Consumers decide to visit a particular country by comparing travel products in terms of price and quality.

The growth in demand for tourism services in Kazakhstan is determined primarily by economic factors. There is a need to ensure the economic accessibility of tourism services to a huge number of visitors coming to Kazakhstan for cognitive, rehabilitation, entertainment, educational, sports purposes. Various segments should be covered, distinguished by economic, geographical, social, and behavioral, demographic characteristics.

The paper argues the position that a holistic integral idea of the tourist flow as a statistical value, a business process and a complex notion confirms the previously put forward scientific hypothesis and leads to the following conclusions.

The multiplicative effect of tourism development is accompanied and caused by the intensification of tourist flows. The direct and indirect impact of tourism on the economy of the country and its regions is expressed in the generation of additional income, increasing employment, reducing unemployment, and developing the area.

The process approach to the study of tourist flows gives an understanding that it is a quantity that depends on many factors. With a scientific approach to managing tourist flows, it is possible to timely identify development trends and adapt to the anticipated changes.

**Ж. Ж. Бельгибаева<sup>1</sup>, Ш. М. Надыров<sup>1</sup>, Г. О. Жангутгина<sup>2</sup>,  
А. К. Бельгибаев<sup>2</sup>, А. А. Бельгибаев<sup>3</sup>**

<sup>1</sup>Өл Фараби атындағы Қазақ ұлттық университеті, Қазақстан, Алматы;

<sup>2</sup>Алматы технологиялық университеті, Қазақстан, Алматы;

<sup>3</sup>Қазақстан-Швейцария туризм және қонақ үй бизнесі институты, Қазақстан, Алматы

#### **ҚАЗАҚСТАННЫҢ ТУРИСТІК АҒЫНЫ: СТАТИСТИКА, ГЕОГРАФИЯ, ТРЕНДТЕР**

**Аннотация.** Туристік ағын бір жағынан туристік шығын мен кіріс, келуші және кетушілердің арақатынасын сипаттайтын статистикалық шама болса, екінші жағынан құрылымы бойынша қарастырғанда өте күрделі ұғым болып есептеледі. Туристік ағынның сандық және сапалық көрсеткіштері бірқатар табиғи, экономикалық, саяси, әлеуметтік, географиялық факторлардың ықпалы арқылы қалыптасады және елдің туристік тартымдылығын, туристік әлеуетті пайдалану тиімділігін, ұлттық туристік өнімге сұранысты қалыптастыруды көрсетеді. Үйлесімді тәуелділік байқалады, мысалы, ұлттық туристік өнімге сұраныс жоғары болса, соғұрлым ішкі туристік ағын көлемі артады.

Туристiк ағын бойынша статистикалық деректер даму сценарийiн әзiрлеу, саланың қызмет ету тиiмдiлiгiнiң көлем көрсеткiштерiн анықтау, мемлекеттiк басқарудың барлық деңгейлерiнiң бюджетiне түсетiн қаржылық түсiмдi есептеу үшiн қажет.

Алайда туристердiң келу және кету ағынын салыстырғанда, кету ағыны бойынша келушiлер саны келу ағымынан көбiрек екендiгi анықталды. Келу және кету ағынының географиясы жыл сайын кеңейiп келедi. Қазақстанның ұлттық экономика министрлiгiнiң статистика жөнiндегi комитетiнiң мәлiметi бойынша ТМД және ТМД-дан тыс елдер арасында алмасу үрдiсi байқалды.

Туризмi дамыған елдер тәжiрибесiн зерделеу жұмыстары туризм саласы жаппай сипатқа иеленетiнiн көрсеттi. Келу және кету ағыны ұлғайған. Жаһандану жағдайында Қазақстан әлемдiк қоғамдастыққа интеграцияланады. Ресей, Қытай, Қырғызстан және Өзбекстанмен көршiлес болуы, шекара маңындағы туризмдi дамыту және бiрлескен өзара тиiмдi жобаларды iске асыруға мүмкiндiк бередi. Қазақстанның географиялық орналасуы белгiлi бiр бәсекелестiк басымдыққа ие.

Нарықтағы жағдайды жете түсiну үшiн, туристiк қызметтердiң тұтынушылар мен өндiрушiлерге бағдар беру, елде, өңiрде және белгiлi бiр жерде туризмдi дамыту стратегиясын әзiрлеу үшiн SWOT-талдау қолданылды.

Бiздiң жағдайымызда туристiк дестинациялардың бiрегейлiгi, қолайлы ахуал, қонақжайлық дәстүр, төл мәдениет, ұлттық тағам, сапалы тамақтану өнiмдерi, мемлекет тарапынан қолдау артықшылық деп танылып, әлеуеттi келушiлердiң қызығушылығын тудырады.

Өлсiз жағы ретiнде жеткiлiксiз қызмет көрсету деңгейi, көлiк инфрақұрылымының дамымауы, бiлiктi мамандардың жетiспеушiлiгi, салыстырмалы жоғары баға, мәлiмет беруде, жарнамада дамыған елдердiң артта қалу жағдайы аталады әрi бұл туризм дамуына жол бермейдi және келушiлерге кедергi жасайды.

Жаңа нарықты және сегменттердi игеру, туристiк қызметтер тiзбесiн кеңейту, туристiк қызмет сапасын және бәсекеге қабiлеттiлiгiн арттыру, отандық және шетелдiк инвесторларды тарту, тұрғындар табысын және жұмыспен қамту деңгейiн арттыру, резиденттер мен резидент еместер топтарына туристiк өнiмнiң экономикалық қолжетiмдiлiгiн қамтамасыз ету, дұрыс жасалған маркетингтiк стратегия жаңа серпiн бередi және туризмнiң дамуы жаңа мүмкiндiктер ашады.

Сонымен, Қазақстанда және тұтастай әлемде әлеуметтiк-саяси жағдайдың нашарлауына, валюталық курстың тұрақсыздығына, табиғи катаклизмдерге және туристiк орталықтарда эпидемиологиялық жағдайдың нашарлауына, әлеуеттi келушiлер төлемiнiң азаюына, бәсекелестiк қысымның күшеюiне байланысты туризмдi қолайсыз жағдайға қалдыратын қауiп-қатерге уақытында назар аудару қажет.

Туризмдi дамытудың мультипликативтi нәтижесi туристiк ағынның қарқын алуымен қатар жүредi және iске асады. Ел экономикасына және өңiрлерге туризмнiң тiкелей және жанама ықпалы қосымша табыс табуда, жұмыспен қамту деңгейiн арттыруда, жұмыссыздықтың азаюы және аумақтардың дамуы барысында көрiнедi.

Туристiк ағынды зерттеуге процестiк көзқарас туристiк ағын көптеген факторларға тәуелдi шама екендiгi туралы түсiнiк бередi. Туристiк ағынды басқаруға ғылыми көзқарас арқылы даму тенденцияларын дер кезiнде анықтап, күтiлетiн өзгерiстерге бейiмделуге болады.

**Түйiн сөздер:** туризм, бюджет, ресурс, келу және кету ағыны, келушi, турист, миграция, сапар, инфрақұрылым, талдау.

Ж. Ж. Бельгибаева<sup>1</sup>, Ш. М. Надыров<sup>1</sup>, Г. О. Жангуттина<sup>2</sup>,  
А. К. Бельгибаев<sup>2</sup>, А. А. Бельгибаев<sup>3</sup>

<sup>1</sup>Казахский национальный университет им. аль-Фараби, Алматы, Казахстан;

<sup>2</sup>Алматинский технологический университет, Алматы, Казахстан;

<sup>3</sup>Казахстанско-Швейцарский Институт Туризма и Гостиничного бизнеса, Алматы, Казахстан

## ТУРИСТКИЕ ПОТОКИ КАЗАХСТАНА: СТАТИСТИКА, ГЕОГРАФИЯ, ТРЕНДЫ

**Аннотация.** Туристский поток – это не только статистическая величина, характеризующая с одной стороны соотношение прибытий и выбытий, туристских расходов и доходов, но и с другой стороны, в структурном отношении – весьма сложное понятие. Количественные и качественные показатели туристского потока складываются под влиянием целого ряда природных, экономических, политических, социальных, географических факторов и свидетельствуют о туристской привлекательности страны, эффективности использования туристского потенциала и о формировании спроса на национальный туристский продукт. Прослеживается пропорциональная зависимость: чем выше спрос на национальный туристский продукт, тем больше объем въездного туристского потока.

Статистические данные по туристским потокам нужны для разработки сценариев развития, выявления объемных показателей эффективности функционирования отрасли, расчета финансовых поступлений в бюджеты всех уровней государственного управления.

Однако, если сравнивать между собой выездные и въездные потоки, то обнаруживается, что количество посетителей по выездному потоку значительно больше по сравнению с въездным потоком. География въездных и выездных потоков с каждым годом расширяется. По данным Комитета по статистике Министерства национальной экономики Казахстана, обмены наблюдались как со странами СНГ, так и странами вне СНГ.

Изучение опыта стран с развитой сферой туризма показало, что туризм приобретает массовый характер. Въездные и выездные потоки имеют тенденцию к увеличению. В условиях глобализации Казахстан интегрируется в мировое сообщество. Соседство с Китаем, Россией, Кыргызстаном и Узбекистаном позволяет развивать приграничный туризм и реализовывать совместные взаимовыгодные проекты. Географическое расположение Казахстана дает определенные конкурентные преимущества.

Для того, чтобы наглядно представить ситуацию на рынке, дать ориентиры для производителей и потребителей туристских услуг, для разработки стратегии развития туризма в стране, регионе и определенной местности целесообразно применение такого инструмента, как SWOT-анализ.

В нашем случае уникальность туристских дестинаций, благоприятный климат, традиции гостеприимства, самобытная культура, национальная кухня, качественные продукты питания, поддержка со стороны государства признаны сильными сторонами и, несомненно, вызовут интерес у потенциальных посетителей.

К слабым сторонам отнесены недостаточный уровень сервиса, неразвитость транспортной инфраструктуры, недостаток квалифицированных специалистов, относительно высокие цены, отставание от развитых стран в рекламе, информировании.

Освоение новых рынков и сегментов, расширение перечня туристских услуг, повышение качества и конкурентоспособности туристских услуг, привлечение зарубежных и отечественных инвесторов, повышение доходов и уровня занятости населения, обеспечение экономической доступности туристского продукта широким слоям резидентов и нерезидентов, грамотно построенная маркетинговая стратегия придадут новый импульс и открывают новые возможности в развитии туризма.

И, наконец, целесообразно своевременно реагировать на угрозы, которые ставят туризм в неблагоприятное положение и обусловленные усилением конкурентного давления, снижением платежеспособности потенциальных посетителей, природными катаклизмами и ухудшением эпидемиологической обстановки в туристских центрах, колебанием валютного курса, ухудшением социально-политической обстановки в Казахстане и в мире в целом.

Мультипликативный эффект от развития туризма сопровождается и вызывается интенсификацией туристских потоков. Прямое и косвенное влияние туризма на экономику страны и его регионов выражается в получении дополнительных доходов, повышении уровня занятости, уменьшении безработицы, развитии территории.

Процессный подход к исследованию туристских потоков дает понимание того, что туристский поток – это величина, зависящая от многих факторов. При научном подходе к управлению туристскими потоками возможно своевременно выявить тренды развития и адаптироваться к предполагаемым изменениям.

**Ключевые слова:** туризм, бюджет, ресурс, выездной и въездной поток, посетитель, турист, миграция, поездка, инфраструктура, анализ.

#### **Information about the authors:**

Belgibayeva Zhanat, Doctor of Science in Economics, Professor of the Department of Management, Al-Farabi Kazakh National University, Almaty, Kazakhstan; Zhanat58@mail.ru; <https://orcid.org/0000-0003-3506-1770>

Nadyrov Sharipzhan, Doctor of Geographical Sciences, Professor of the Department of Geography, Land Arrangement and Cadastre, Al-Farabi Kazakh National University, Almaty, Kazakhstan; scharipjan@mail.ru; <https://orcid.org/0000-0003-0099-2161>

Zhanguttina Gulnar, Candidate of Sciences in Economics, Associate Professor, Dean of the Department of Economics and Business, Almaty Technological University, Almaty, Kazakhstan; eib@mail.ru; <https://orcid.org/0000-0002-9165-2973>

Belgibayev Almaz, Candidate of Science in Economics, Associate Professor, Department of Accounting and Finance, Almaty Technological University, Almaty, Kazakhstan; Belgibayev@mail.ru; <https://orcid.org/0000-0002-9498-9379>

Belgibayev Anuar, Master in Economics, lecturer of Kazakh-Swiss Institute of Tourism and Hotel Business, Almaty, Kazakhstan; belgibaev.92@mail.ru; <https://orcid.org/0000-0003-1844-0445>

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