



ROYAL THAI EMBASSY
IN ASTANA

ANALYTICAL PAPER ON TOURISM INDICATORS IN KAZAKHSTAN FOR THE FIRST HALF OF 2024

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BY THE ROYAL THAI EMBASSY IN ASTANA

INTRODUCTION

Although there is a lack of data on the official Kazakhstani statistical agency websites, this analytical paper will instead consider reports from the previous year, 2023, with some available data from 2024.

Tourism is a vital sector for Kazakhstan, contributing significantly to the nation's economy by generating employment, fostering cultural exchange, and promoting regional development. In recent years, Kazakhstan has undertaken various initiatives to boost its tourism industry, including infrastructural developments, marketing campaigns, and policy reforms. As a result of this Kazakhstan has **secured the 52nd position** in the World Economic Forum's 2024 Travel and Tourism (T&T) Development Index, marking an ascent of six places since 2019.

FIGURE 2 Travel & Tourism Development Index 2024 overall rankings¹

Rank	Economy	Score ²	Change since 2019 ³ Rank	Diff. from TTDI Avg. (%)	Rank	Economy	Score ²	Change since 2019 ³ Rank	Diff. from TTDI Avg. (%)	Rank	Economy	Score ²	Change since 2019 ³ Rank	Diff. from TTDI Avg. (%)			
1	United States	5.24	0	-0.5%	32.3%	41	Saudi Arabia	4.23	9	5.7%	6.7%	81	Tanzania	3.65	7	4.5%	-7.9%
2	Spain	5.18	0	0.9%	30.6%	42	Slovenia	4.22	-9	-1.2%	6.4%	82	Morocco	3.64	-12	-3.2%	-8.2%
3	Japan	5.09	0	-0.3%	28.5%	43	Romania	4.19	2	0.8%	5.7%	83	Tunisia	3.60	2	1.0%	-9.2%
4	France	5.07	2	0.8%	28.0%	44	Lithuania	4.17	4	1.4%	5.2%	84	Jamaica	3.59	-1	-0.1%	-9.5%
5	Australia	5.00	2	0.8%	26.0%	45	Georgia	4.14	4	1.0%	4.4%	85	Mongolia	3.57	-6	-2.0%	-9.8%
6	Germany	5.00	-1	-0.8%	26.0%	46	Croatia	4.13	-2	-0.7%	4.3%	86	Cambodia	3.57	4	2.5%	-10.0%
7	United Kingdom	4.96	-3	-2.4%	25.2%	47	Thailand	4.12	-6	-2.5%	3.9%	87	North Macedonia	3.53	-5	-1.9%	-10.9%
8	China	4.94	1	1.0%	24.6%	48	Israel	4.10	-5	-1.6%	3.4%	88	Moldova	3.53	1	1.0%	-11.1%
9	Italy	4.90	3	2.1%	23.5%	49	Argentina	4.10	-2	-0.6%	3.4%	89	Trinidad and Tobago	3.52	-5	-2.1%	-11.3%
10	Switzerland	4.81	-2	-2.3%	21.3%	50	Colombia	4.08	6	2.3%	3.0%	90	Bosnia and Herzegovina	3.51	1	1.1%	-11.5%
11	Canada	4.81	-1	-1.1%	21.2%	51	Costa Rica	4.08	4	2.2%	2.9%	91	Lao PDR	3.48	2	1.7%	-12.1%
12	Portugal	4.78	1	-0.1%	20.6%	52	Kazakhstan	4.07	6	3.7%	2.6%	92	Paraguay	3.47	0	0.8%	-12.5%
13	Singapore	4.76	-2	-1.7%	19.9%	53	Qatar	4.02	-7	-3.3%	1.3%	93	Rwanda	3.45	6	2.6%	-12.9%
14	Korea, Rep.	4.74	0	1.1%	19.6%	54	Slovak Republic	4.00	-2	-0.2%	0.8%	94	Bolivia	3.45	3	2.1%	-12.9%
15	Austria	4.65	0	-0.5%	17.4%	55	South Africa	3.99	7	3.4%	0.7%	95	Namibia	3.45	-8	-1.7%	-13.0%
16	Netherlands	4.64	1	0.1%	17.0%	56	Azerbaijan	3.98	-5	-0.6%	0.3%	96	Kuwait	3.44	-10	-2.9%	-13.2%
17	Denmark	4.63	-1	-0.9%	16.8%	57	Mauritius	3.98	-4	-0.7%	0.3%	97	El Salvador	3.43	4	4.0%	-13.4%
18	United Arab Emirates	4.62	7	4.4%	16.5%	58	Bahrain	3.96	3	2.1%	-0.1%	98	Algeria	3.42	2	2.6%	-13.6%
19	Sweden	4.57	0	0.7%	15.4%	59	Viet Nam	3.96	4	3.2%	-0.2%	99	Tajikistan	3.42	-3	0.7%	-13.7%
20	Finland	4.52	-2	-1.7%	14.0%	60	Montenegro	3.96	-1	0.9%	-0.2%	100	Guatemala	3.42	-5	0.5%	-13.8%
21	Greece	4.52	5	2.6%	13.9%	61	Egypt	3.96	5	4.3%	-0.2%	101	Pakistan	3.41	3	3.6%	-14.0%
22	Indonesia	4.46	14	4.5%	12.4%	62	Peru	3.90	7	3.5%	-1.5%	102	Kyrgyz Republic	3.38	1	2.8%	-14.7%
23	Belgium	4.45	0	-0.5%	12.2%	63	Panama	3.90	-6	-1.2%	-1.6%	103	Venezuela	3.34	-5	-0.9%	-15.7%
24	Ireland	4.44	-3	-1.5%	12.0%	64	Dominican Republic	3.88	1	1.8%	-2.0%	104	Zambia	3.34	-2	1.4%	-15.7%
25	New Zealand	4.41	-5	-2.6%	11.3%	65	Latvia	3.88	-11	-3.0%	-2.1%	105	Nepal	3.34	0	2.8%	-15.7%
26	Brazil	4.41	8	3.3%	11.2%	66	Albania	3.87	12	5.9%	-2.4%	106	Ghana	3.28	1	1.5%	-17.2%
27	Poland	4.40	3	2.0%	11.1%	67	Oman	3.87	-7	-1.2%	-2.5%	107	Senegal	3.24	2	2.5%	-18.2%

Source: World Economic Forum's 2024 Travel and Tourism (T&T) Development Index

TOURISM SECTOR PERFORMANCE IN 2023-2024

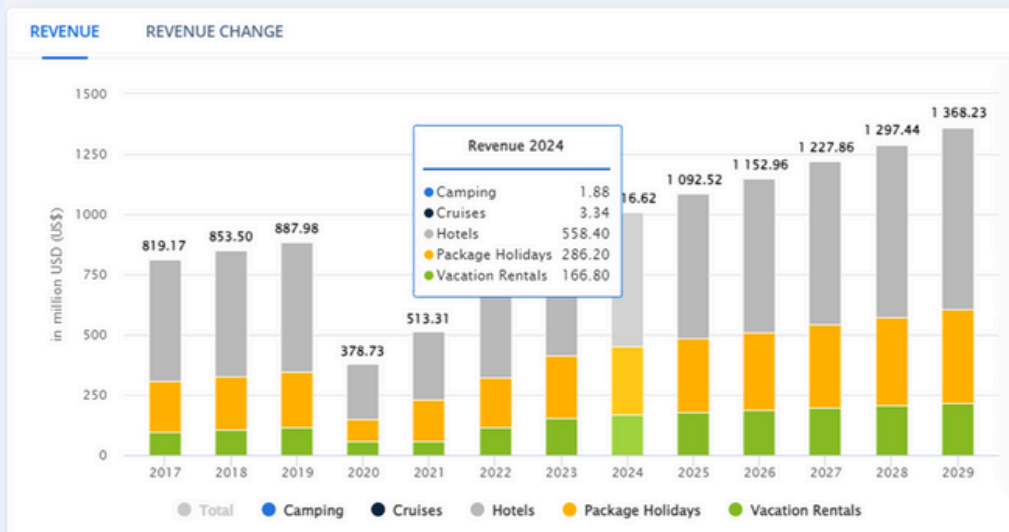
Kazakhstan welcomed approximately 9.2 million tourists over the past year, marking a 15% increase compared to the statistics from 2019, when 8.5 million foreigners came to Kazakhstan.

The majority of tourists originated from neighboring countries such as Russia, China, and Uzbekistan, with a notable rise in visitors from Europe and the Middle East.

ECONOMIC CONTRIBUTIONS

The tourism sector generated an estimated \$1.8 billion in revenue, reflecting a 20% year-on-year growth. This increase is attributed to higher spending per tourist and an increase in longer stays. The sector's contribution to the national GDP rose to 2.5%, up from 2.1% in the first half of 2023.

Revenue



Source: Statista Market Insights

The influx of tourists has provided a major economic boost, with services provided to visitors at accommodation sites reaching 230 billion tenge (US\$521.1 million), and contributing 450 billion tenge (US\$1 billion) in tax revenues in a past year.

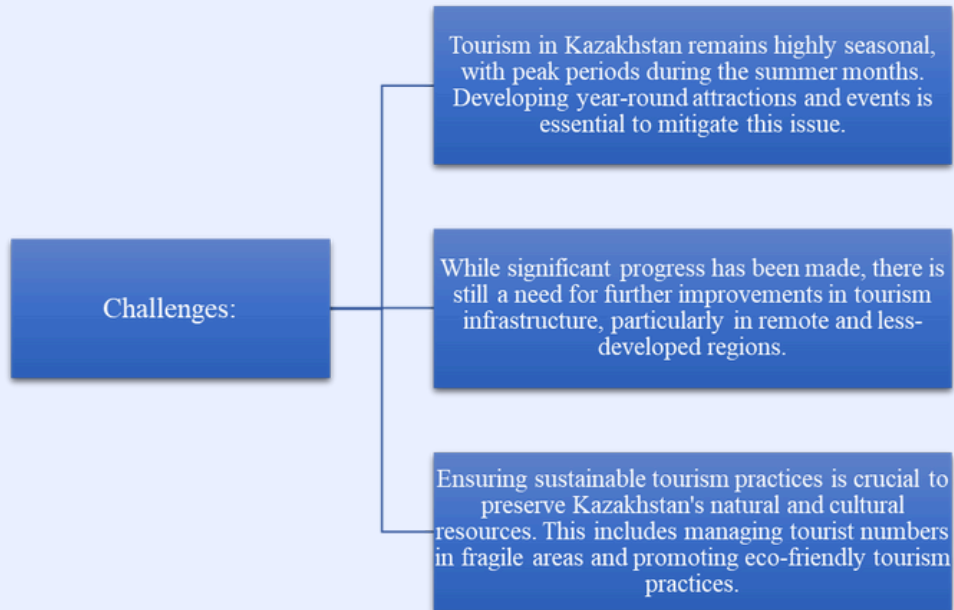
FACTORS DRIVING GROWTH

The positive trends observed in the first half of 2024 indicate a robust recovery and growth in Kazakhstan's tourism sector. Several factors contributed to this performance:

<p>The introduction of e-visas and the improvement of transport infrastructure, including new flight routes and improved road networks, have made Kazakhstan more accessible to international tourists.</p>	<p>Aggressive marketing campaigns showcasing Kazakhstan's natural beauty, cultural heritage, and adventure tourism opportunities have successfully attracted a diverse range of tourists.</p>	<p>The COVID-19 pandemic highlighted the potential of domestic tourism. The government and private sector initiatives to promote local travel have sustained interest in domestic tourism even as international travel restrictions eased.</p>

CHALLENGES IN THE TOURISM SECTOR

Despite the positive indicators, several challenges need to be addressed:



FUTURE PROJECTIONS AND OPPORTUNITIES

The first half of 2024 has shown promising growth in Kazakhstan's tourism sector, driven by strategic initiatives and a favorable economic environment. Foreign tourist arrivals are projected to reach 10.8 million by the end of 2024, surpassing the pre-pandemic level. The travel and tourism market are forecast to reach \$1.07 billion in revenue, driven by increasing demand from both foreign and domestic travelers.

CONCLUSION

Continued investment in infrastructure, marketing, and sustainable practices will be essential to maintain this growth trajectory. By addressing the existing challenges and capitalizing on emerging opportunities, Kazakhstan can further enhance its position as a premier tourist destination in Central Asia.

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