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The Effectiveness of investments in the tourism Industry of the Republic of Kazakhstan

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Abstract. Tourism is a specific branch of the economy, therefore, the assessment of the effectiveness of investments is relevant, which was the content of this article. To enhance the investment activity of the tourism industry, it is necessary to assess the objective resource capabilities of the industry, infrastructure and destinations.

It is determined that the effectiveness of tourism is not always the volume of investments, but the possibility of attracting investments with maximum return and high intensity. Investments in tourism are carried out through: government programs, investments of quasi-governmental structures, the private sector, public-private partnerships. The purpose of the article is to evaluate the results of investments in the tourism industry to increase its activity. The idea of the article is the need to evaluate the effectiveness of investments and what indicators are recommended for this.

The research is based on a statistical database and a survey.

The value of the study lies in assessing the effectiveness of measures for the development of tourism, and the results obtained can be applied to analyze its development.

Key words: tourism industry, assessment, indicators, tourism potential, tourist activity, effectiveness.

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Introduction

The effectiveness of investments in the industry is an urgent topic for research, as the results will affect the development of the tourism sector. Currently, there are a number of studies on the presented topic. However, the assessment of the effectiveness of investments remains relevant.

When conducting research, it should be borne in mind that the assessment of the effectiveness of investment projects should be based on a set of rules that regulate this process in detail and comprehensively (including legal, organizational, and computational and analytical aspects). Each of the indicators used in assessing the effectiveness of the practical implementation of an investment project has both a set of advantages and a number of disadvantages. Moreover, the evaluation of the effectiveness of investment projects should be carried out not only at the stage of choosing an investment project, but also after its practical implementation in order to determine the correctness of the decision made or refute it and form an appropriate scientific and methodological basis for the most accurate choice in the future.

Improving the efficiency of the tourism industry requires agreement and coordination of the actions of organizations at the national, regional and local levels interested in stimulating entrepreneurial activity and its further development in the future.

In Kazakhstan, the departments that are directly involved in improving the quality and accessibility of tourist products and services, creating a favorable tourist climate in the domestic and international markets are the Ministry of Tourism and Sports (hereinafter referred to as the MTS), the JSC “National Company “Kazakh Tourism”, which provides leadership, inter-sectoral coordination and state regulation of the tourism sector. These structures pay special attention to marketing and promotion of the country, as well as attracting investment in tourism. In their daily activities, they rely on partnerships and alliances with international tourism associations, development organizations, tourism businesses and media companies.

Over the past decades, the world has seen the growth of the tourism industry. International tourism has become a driver of socio-economic development through job creation, export of services and infrastructure development.

In Kazakhstan, in 2020, the construction of 23 projects worth 14.8 billion KZT, as well as 99 sanitary and hygienic units worth 1.0 billion KZT were financed under the Employment Roadmap program [– ERM]. Under the “Economy of Simple Things” Program, 5 codes of the common classifier of economic activity (– CCEA) of tourism are included and more than 58 projects worth more than 26 billion KZT with a loan term of up to 10 years have been financed; within the framework of the “Business Roadmap” [– BRM] 2025, more than 177 projects worth more than 60 billion KZT have been financed with a loan term of up to 5 years; the “Open Skies” regime has been introduced at 12 airports in Kazakhstan; in 2020, the International University of Tourism and Hospitality was opened in Turkestan.

In order to improve the legislative framework in the field of tourism, the Law of the Republic of Kazakhstan “On Amendments and Additions to Certain Legislative Acts of the Republic of Kazakhstan on Tourism Activities” was adopted, which provides for the introduction of systemic measures of state support for the tourism industry (subsidizing tour operators for a foreign tourist (15 thousand KZT); reimbursement for the purchase of machinery and equipment (cable

cars roads, snow trucks, snow generators) for ski resorts (25%); reimbursement of part of the costs of construction, reconstruction of tourist facilities (10%), motorway service facilities (10%) (hereinafter referred to as the MSF), for the purchase of tour buses (25%); subsidizing the maintenance of sanitary and hygienic units (83.3 thousand KZT); reimbursement of a children's ticket as part of a tour package (Kids Go Free). From the above data, it can be seen that the investment process in the industry is quite large, so it is important to increase the activity of this industry.

Research Methodology

The methodological basis of the study should begin with the collection of information, namely the statistical base of the industry development in the tourist regions of the Republic of Kazakhstan. The next stage is to conduct a comprehensive analysis based on a combination of structural, functional and systematic approach, including historical and comparative method, content analysis of information and materials that allowed us to identify significant characteristics of the processes under study, to note the contradictions inherent in them, to establish the modern directions of their development, and the following research methods were used: dialectics, deduction, induction, analogy; economic and mathematical methods, including correlation and regression analysis; methods of statistical analysis, methods of comparisons, generalizations, expert assessments, etc.

Results and Discussion

In modern conditions, the dynamically developing tourism industry of Kazakhstan depends on investments, the effectiveness of which is determined by a number of factors, including the level of development of interregional and territorial systems. The cumulative effectiveness of investment processes in the tourism industry, in the context of a multiplier effect, will improve the quality of tourist services provided, the standard of living of the local population and the development of territorial systems of the tourism industry. These processes create the need to find tools for a comprehensive solution to the effectiveness of investments in the tourism infrastructure of the Republic of Kazakhstan.

To do this, it is necessary to form investment activities:

- increasing the efficiency of cash turnover in the tourism industry of the Republic of Kazakhstan, through a comprehensive analysis of the current state and identification of weaknesses for strengthening;
- development and implementation of effective and “transparent” methods for the final calculation of the effectiveness of an investment project in the tourism industry.

Every tourist activity performs a certain function: cognitive, educational, wellness, social-communicative, sports, aesthetic and emotional-psychological, creative, pilgrimage, etc.

Indisputably the potential of tourism is not limited to these functions. On the other hand, the functional expansion of tourism potential stimulates people's travel needs, which contributes to the development of the tourism industry as a complex of enterprises, institutions and

organizations that provide increasing production of goods and services for tourists. All this contributes to the increasing socio-economic importance of tourism in society [1, pp. 82, 83].

In order to form such a tourism potential and, most importantly, its effective implementation, issues of organizing equally effective management as a driving mechanism of tourism policy play an important role.

The study of the theoretical foundations of the development of the tourism industry convinces: its positive impact on the economy and social life of society is carried out only when this industry develops in parallel and in conjunction with other sectors of the socio-economic complex at the macro, meso and micro levels of management, without turning the country's economy into a service economy and without causing damage to the development of other economic and social sectors [2, p. 29].

For a long time, tourist activity was understood in a narrow sense: trips abroad, excursions to certain regions of the country and outdoor recreation, while the sanatorium and resort sphere was not perceived as a tourist one.

Attention to tourism as an independent industry has begun to increase on the part of the state only in the last two decades. The relevant state structures for managing these activities were consistently formed, program documents (state programs, concepts) for the development of the tourism industry were developed and implemented, normative legal acts of ministries and departments involved in the tourism management system were expanded and deepened, and other measures, which will be discussed in more detail below, in the context of considering the effectiveness of tourism management.

A generalizing indicator of the development of tourism activities directly is the volume of tourist services provided, the dynamics of which in recent years, by region of the country, is presented in Table 1.

Table 1. The volume of tourist services, million tenge

	2015	2020	2021	2023	2023 to 2015, times
The Republic of Kazakhstan	72 597.2	66860.3	109027.3	182865.3	2.5
Abai				3 847.3	
Akmola	4 255.9	6421.6	10522.8	17171.5	4.034
Aktobe	1 445.8	1100.9	2243.0	3 224.3	2.23
Almaty*	3 202.8	5321.3	8441.1	6 566.6	2.05
Atyrau	6 802.8	3233.4	1675.0	5 492.0	0.8
West Kazakhstan	1 970.3	1987.6	3165.3	3 652.5	1.85
Zhambylskaya	874.9	988.6	1497.3	1 864.4	2.1
Zhetisu				5 219.7	
Karaganda*	3 418.4	2975.9	4626.3	5 522.9	1.52
Kostanay	1 075.4	980.2	1841.1	2 583.1	2.4
Kyzylorda	739.4	723.5	1100.2	1 281.8	1.73

Mangystau	4 656.5	4378.0	7250.1	11459.4	2.46
Pavlodar	1 915.3	1345.0	2369.3	3 574.0	1.86
North Kazakhstan	1 550.4	681.8	1399.3	1 671.6	1.07
Turkestan*	583.5	1297.6	3848.1	5 001.1	8.6
Ulytau				391.6	
East Kazakhstan*	3 290.4	3307.9	5618.2	4 862.0	1.47
Astana	18 228.4	11564.3	20289.1	35185.4	1.93
Shymkent		3746.1	5232.1	8107.6	2,16 K 2020
Shymkent Note: Data from the Bureau of National Statistics of the Republic of Kazakhstan ASPiR. *- for 2023 - estimates					

First of all, it should be noted that there is a significant gap in the rate of development of the indicator in the regional context: from 8.6 times in Turkestan and a 30% decline in Atyrau regions in 2023 compared with 2010, with an average national indicator of 4.04 times. In general, it should be noted that the volume of investments did not significantly affect the development of the industry in the regions.

Quasi-governmental structures have also invested in the tourism industry. Table 2 shows how much investment they have made.

Table 2. Investments in fixed assets in the tourism sector for 2017-2023, million KZT

CCEA code	Direction / Industry	RK
49.1	Passenger rail transport, intercity	21 584.3
49.3	Other passenger land transport	22 787.5
50.1	Marine and coastal passenger transport	–
50.3	River passenger transport	–
51.1	Air passenger transport	11 684.6
I (55, 56)	Accommodation and catering services, including	
55	Provision of temporary accommodation services	54 504.9
56	Provision of food and beverage services	10 757.6
77.11	Rental and leasing of passenger cars and light vehicles	1 303.3
77.21	Rental and rental of entertainment and sports equipment	
79	Activities of travel agencies and operators, booking and related activities	17.0
90, 91, 92, 93	Art, entertainment and recreation	88 185.3
	Total for RK in the field of tourism	210 824.7
Note – calculated by the authors		

SMEs operating in the field of tourism also had the opportunity to receive financial support for the implementation of investment projects within the framework of the State Program “BRM 020”. Summary table 3 shows investment projects for subsidizing SMEs in the 1st, 2nd and 3rd directions by region from 2010 to 2023. (1) – support for small businesses, including microenterprises; 2) industry support for entrepreneurs/subjects of industrial and innovative activity; 3) provision of non-financial measures to support entrepreneurship.)

Table 3. Investment projects for subsidizing SMEs in 3 directions by region between 2010 and 2023

Regions	in the 1st direction		in the 2nd direction		in the 3rd direction	
	Amounts, billion tenge	Number of projects	Amounts, billion tenge	Number of projects	Amounts, billion tenge	Number of projects
Republic of Kazakhstan, total	284.56	5795	1125.1	12574	476.67	383
Akmola region	34.82	442	65.16	466	48.36	27
Aktobe region	23.87	355	109.0	1036	21.94	5
Almaty region	37.27	482	192.58	543	38.94	14
Atyrau region	24.83	437	109.68	647	1.64	1
West Kazakhstan region	20.65	315	121.52	456	9.04	9
Zhambyl region	22.43	451	101.92	719	8.06	5
Karaganda region	36.05	452	125.96	749	19.07	22
Kostanay region	26.58	511	84.64	693	78.25	72
Kyzylorda region	12.47	341	68.7	686	2.28	4
Mangystau region	17.08	388	99.77	389	13.71	4
Pavlodar region	33.84	408	174.18	1051	21.44	14
North Kazakhstan region	20.35	342	70.10	718	29.53	65
East Kazakhstan region	24.01	439	103.52	953	59.51	51
Astana	13.94	45	232.41	1195	10.35	5
Almaty	14.29	59	360.46	1152	26.24	13
Shymkent	1.19	9	73.39	355	7.24	7
Turkestan region	20.91	319	132.13	466	81.06	65
The share of EKR in the total amount of projects	6.2%	7.6%	4.7%	7.6%	12.5%	13.3%
In the field of tourism of EKR	3.53	89	10.03	170	0.00	0.00

In addition, there are seven measures of state support for entrepreneurs in the field of tourism in the country. These include: subsidizing the costs of tour operators for each foreign tourist, subsidizing the cost of air tickets in Kazakhstan for children (Kids Go Free program), reimbursing entrepreneurs for part of the cost of buying ski equipment, vehicles (25%), construction of motorway service facilities, construction and reconstruction of tourist facilities

(10%), as well as subsidies for the maintenance of sanitary hygienic units (83,300 tenge per month). As part of these measures, 29 applications for partial reimbursement of costs totaling 480 million KZT were approved. A mechanism for tourist cashback is also being developed, thanks to which citizens of Kazakhstan will be able to return part of the cost of the tour while traveling within the country. As can be seen from the table, the share of subsidies in three directions of the East Kazakhstan region is about 7-12% in terms of allocated amounts and 8-12% in terms of the number of projects implemented in the republic.

From 2020 to 2023, investments in the amount of \$ 4 billion were attracted to the tourism industry of Kazakhstan, in 2022 alone their volume amounted to 513.3 billion KZT. In addition, over 400 tourist sites have been built in the country in two years. This year, it is planned to implement 115 investment projects worth 288 billion KZT, which will create more than 14 thousand beds and more than 1.5 thousand permanent jobs. In the first half of 2023, the volume of tax revenues from tourism activities in Kazakhstan amounted to about 208 billion KZT. This is 10.4% more than in the same period of 2022. And by the end of last year, a record figure of 389 billion KZT was fixed.

In order to strengthen the information and statistical base in Kazakhstan, the formation of Tourism Satellite Accounts (– TSA) has been carried out since 2008, in accordance with the methodology of the UNWTO World Tourism Organization. The TSA report contains information that is sufficiently representative for analysis (Table 4).

Table 4. Indicators of tourism development in Kazakhstan

	2010	2015	2020	2021	2023
Gross value added created in tourism industries, trillion KZT	0.99	1.63	2.77	2.19	2.87
The share of gross value added created in tourism industries in GDP, in %	4.5	4.0	4.0	3.1	3.4
Gross value added created directly in tourism, billion KZT	259.5	406.4	821.5	410.5	572.5
The share of gross value added directly in tourism in GDP, in %	1.2	1.0	1.2	0.6	0.7
Domestic supply (output) of tourism industries, trillion KZT	2.1	7.74	11.2	6.72	9.83
Consumption related to tourism within the country, billion KZT	496.1	790.3	1828.1	807.2	1130.8
Consumption related to inbound tourism, billion KZT	182.0	384.4	1 120.1	233.1	324.5
Consumption related to outbound tourism, billion KZT	211.7	477.8	1 132.2	351.0	727.7
The number of visitors who entered Kazakhstan, million people	4.10	6.43	8.52	2.03	1.33
The number of visitors who left Kazakhstan, million people	6.02	11.30	10.71	2.86	3.50

The number of legal entities in various industries, thousand units	12.0	21.0	51.5	39.8	42.3
The number of people employed in the tourism industry, thousand people	333.3	428.5	469.9	458.3	463.1
The share of people employed in tourism in the total number of people employed, in %	4.1	5.1	5.4	5.2	5.3
The index of change in the number of employed people in tourism, in % to the previous year	106.2	103.8	101.3	97.5	101.0
Note: Data from the Bureau of National Statistics of the ASPIR of RK, compiled on the basis of reports on the Tourism Satellite Account (TSA), calculated according to the methodology of the UNWTO World Tourism Organization, for the relevant years; the TSA Report for 2023.					

In particular, such a generalizing indicator is given as the volume of gross value added of both all sectors covered by the tourism sector and the tourism industry itself, with estimates of their specific weights in the country's GDP. The processing of the TSA data shows that according to this indicator, the domestic tourism industry has recovered somewhat after the pandemic, with an increase of 2.9 times in 2023 to the level of 2010 (before the pandemic – 2.8 times).

Information on the ratio of supply and demand in the travel services market is also of considerable interest. In particular, the total domestic, inbound and outbound consumption of tourism industry services in 2023 in the amount of 2183.0 billion KZT amounted to only 22.2% of the volume of services offered, while in 2010 it was 44.8%.

This means that the travel services market in Kazakhstan is in a state of imbalance, with an oversupply of services. It seems that this is largely due to an inefficient marketing system in the tourism market.

In general, the analysis of the official statistical information currently being formed, due to its incompleteness and untimeliness, creates, in our opinion, the basis only for superficial assessments of the state of development of the tourism industry. In order to better understand the problematic aspects in the development of the tourism industry, it is necessary to rely on the scientific research of experts and practitioners from the management. Otherwise, it will be extremely difficult to solve the tasks of ensuring the sustainable development of the tourism industry at all levels of administration.

In particular, the principles of sustainable development follow from the world practice of tourism development:

- ensuring the optimal use of the potential of natural resources, which is a key element in the successful development of tourism;
- showing respect and ensuring the preservation of cultural heritage and traditional values of the population in tourist destinations, promoting intercultural understanding and religious tolerance;
- provision and fair distribution of socio-economic benefits determined by tourism for all parties involved in the value chains of the tourism industry – employment, income opportunities, social security, etc. [3].

These principles should be the basis for the formation of a systematic approach to the development of the tourism industry and the processes of formation and the degree of implementation of legislative and regulatory legal acts that form the basis for ensuring the development of the tourism industry since the beginning of the independent development of the country should be analyzed.

Conclusion

Thus, Kazakhstan adopted a new concept "On Approval of the Concept of Development of the Tourism Industry of the Republic of Kazakhstan for 2023-2029 (Resolution of the Government of the Republic of Kazakhstan of March 28, 2023 No. 262) (hereinafter referred to as the Concept), the main purpose of which was to create a highly efficient, competitive tourism industry, successfully integrated into the global tourism system.

It should be emphasized that the new Concept was the result of the approach to the program-target approach typical for public administration processes of those times, when a change of top management was accompanied by a change in management, which often, in our opinion, had no acceptable justification.

Among the tasks introduced in the already traditional manner, a specific emphasis was placed on the development of domestic and inbound types of tourism, which was not in the early official program and conceptual documents.

However, again, due to the incompleteness of scientific and methodological justifications, the target results turned out to be significantly overestimated. For example, it was planned to achieve in 2023 an increase in the volume of services provided by tourist accommodation and placement to 875 billion KZT, while in reality in 2022, according to official statistics, only 182.9 billion KZT was provided [4].

In full accordance with this logic, in our opinion, the State Program for the Development of the Tourism Industry for 2019-2025 was adopted in 2019, which set the main target – creating the necessary conditions for the effective development of the domestic tourism industry, which should have allowed us to solve the task of achieving an 8 percent share in the GDP structure in 2025. However, according to the Tourism Satellite Account report, in 2021 this share of the tourism industry was 3.7%, and purely tourism – 0.7%, which, again, raises considerable doubts about the scientific validity of the targets of the State Program [5].

In general, it was clear that the approach based on state programming, with all its disadvantages, is inherent in the State Program for the Development of Tourism. From these positions, one can understand the fact that in the period of 2022-2023, due to the transition to national design and the adoption of 10 National Projects, almost all existing state programs, including the State Tourism Program 2023, were put on hold, with the exception only of the State Program on Languages for the period up to 2025.

Today, there is already a strong opinion that the adopted national projects are little or completely ineffective, which is convincingly evidenced by the reports of the Supreme Audit Chamber of the Republic of Kazakhstan, as well as many experts and management practices. This was to be expected, since the approach based on national design was blindly copied

from the Russian experience. However, as is known, in Russia, having become convinced of the inefficiency of many national projects, they again switched to a state program approach in planning and management, and the remaining national projects were shifted in terms of implementation until 2030.

On the other hand, the issues of managing the development of the tourism industry “spread” across different departments – the Ministry of National Economy, the Ministry of Digital Development, Innovation and Aerospace Industry, the Ministry of Culture and Sports, implementing various national projects and which address certain issues of tourism development. It is clear that such a situation did not allow us to consider all issues in this area within the framework of a single integrated approach.

In these conditions of uncertainty, the Ministry of Culture and Sports of the Republic of Kazakhstan in 2023 submitted for consideration a draft Concept for the development of the tourism industry of the Republic of Kazakhstan until 2026, which again set overly ambitious goals and objectives [6].

However, as a result, the Concept for 2023-2029 was adopted. It sets a goal to turn tourism into one of the priorities of the socio-economic development of the country, generally increasing employment in this area to 0.8 million people, and the volume of its gross value added to 6.3 trillion KZT. It is also planned to increase the growth of investments in accommodation and catering services to 260 billion KZT.

It seems that the intensification of activities in all areas outlined in the 2029 Concept will increase the flows of residents to 11 million people and non-residents to 4 million people by 2030 [7].

It should especially be noted that in terms of increasing the scientific validity of the Concept, the Order of the Minister of Tourism and Sports of the Republic of Kazakhstan of November 2, 2023 approved the Methodology for calculating target indicators and indices of the results of the Concept-2029, which, admittedly, was not done in the earlier conceptual documents discussed above.

All this allows us to express the hope that in the development of the tourism industry there may come a stage of real movement towards building a competitive and resistant to all kinds of negative internal and external factors of the tourism industry.

Gratitude, conflict of interest

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Contributions from the authors

The author-coordinator of the article is a doctoral student **A.Sh. Berdibekova**, the analytical part was performed by Doctor of Economics, Professor **V.V. Biryukov**, **L.M. Mutalieva** made a significant contribution to the concept and idea of the article and formulated it in the text of the article.

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Қазақстан Республикасының туристік салаға салынған инвестициясының тиімділігі

Аңдатпа. Туризм – бұл экономиканың нақты саласы, сондықтан инвестициялардың тиімділігін бағалау бірқатар проблемаларды тудырады, олардың төмендеуі оңтайлы және объективті шараларды таңдау кезінде мүмкін болады.

Туристік саланың инвестициялық белсенділігін күшейту үшін туристік сала мен туристік аумақ инфрақұрылымының объективті ресурстық мүмкіндіктерін бағалау қажет. Осы мақалада туризмді дамытуға, қызмет саласына, қаржы ресурстарын инвестициялау бағытына, туристік белсенділікке және т.б. инвестициялардың нәтижелілігін бағалауға әрекет жасалды.

Туризмнің тиімділігі әрдайым салаға салынатын инвестициялардың көлемі бола бермейтіні анықталды, ал инвестициялық белсенділік дегеніміз – ресурстық мүмкіндіктерге, яғни Туристік кәсіпорындардың инвестициялық белсенділігіне сүйенетін Туристік кәсіпорындардың инвестициялық процестерінің тиімділігін бағалау, бұл қаржы-шаруашылық қызметке инвестициялық салымдарды оның максималды қайтарымы мен жоғары қарқындылығымен тарту мүмкіндігі.

Ғылыми мақаланың мақсаты оның белсенділігін арттыру үшін туристік саланың нәтижелілігін бағалау болып табылады. Мақаланың идеясы – инвестициялардың өнімділігін бағалау қажеттілігі және ол үшін қолданылатын көрсеткіштердің ұсынылуы. Зерттеудің әдіснамалық

базасы статистикалық базадан және сауалнамадан басталды, содан кейін кешенді талдау әдістері қолданылды, оның ішінде тарихи-салыстырмалы әдіс, зерттелетін процестердің маңызды сипаттамаларын анықтауға мүмкіндік беретін ақпарат пен материалдарды мазмұнды талдау бар. Зерттеудің құндылығы туристік саланы дамыту үшін қабылданатын шаралардың нәтижелілігін бағалау болып табылады, ал нәтижелер оның дамуын талдау үшін қолданылуы мүмкін.

Түйін сөздер: Туристік сала, бағалау, көрсеткіштер, туристік әлеует, туристік белсенділік, нәтижелілік.

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Результативность инвестиций в туристскую отрасль Республики Казахстан

Аннотация. Оценка результативности инвестиций в туризм как специфической отраслью экономики, являются объектом исследования в данной статье. Для этого необходимо оценить объективные ресурсные возможности отрасли, инфраструктуры и дестинаций как условий для повышения инвестиционной активности туристской отрасли. Из этого следует, что результативность туристской отрасли - это не всегда объем инвестиций, а возможность привлечения инвестиций с максимальной отдачей и высокой интенсивностью.

Инвестиции в туризм осуществляются через: государственные программы, инвестиции квазигосударственных структур, частного сектора, государственно-частное партнерство.

Цель статьи – оценить результаты инвестиций в туристскую отрасль для повышения ее активности. Идея статьи заключается в оценке результативности инвестиций и в том, какие показатели рекомендуются для этого. В основе исследования применена статистическая база данных и опрос проведенный авторами.

Ценность исследования заключается в оценке результативности мер по развитию туризма, а полученные данные могут быть применены для анализа его развития.

Ключевые слова: туристская отрасль, оценка, показатели, туристский потенциал, туристская активность, результативность.

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