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TRENDS IN THE DEVELOPMENT OF THE TOURIST DESTINATION OF THE SHCHUCHINSK-BOROVSKAYA RESORT AREA

The article examines the development of resort areas in Kazakhstan with an emphasis on the Shchuchinsk-Borovskaya resort area as one of the country's key tourist destinations. The dynamics of accommodation services, tourist arrivals, and the infrastructure base of resort areas in the post-pandemic period are analyzed. A steady expansion of economic activity in the tourism sector has been identified, accompanied by growth in tourist flows and a gradual transformation of the accommodation structure.

It is shown that the Shchuchinsk-Borovskaya resort area demonstrates faster growth in value indicators compared to the dynamics of tourist arrivals, reflecting an increase in average revenue per tourist and a shift in demand toward higher-quality accommodation. It is determined that the share of the Shchuchinsk-Borovskaya resort area in the total volume of services and the number of visitors ensures relative stability amid the overall growth of the resort sector in Kazakhstan, indicating the formation of a more balanced spatial structure of tourism.

The dynamics of accommodation capacity are analyzed, on the basis of which it is established that the pace of infrastructure expansion lags behind the growth of tourist flows. This indicates an increasing load on key facilities and rising economic efficiency of their use. The methodological basis of the study includes comparative and structural-dynamic analysis, as well as the use of official statistical data from the Bureau of National Statistics of the Republic of Kazakhstan.

It is shown that a comprehensive comparison of cost, flow, and infrastructure indicators allows for a deeper understanding of the patterns governing the development of resort areas as socio-economic systems. The results obtained can be used in the development of regional tourism programs, substantiation of investment decisions, and the formulation of sustainable development priorities for resort areas in Kazakhstan.

Keywords: resort areas, tourism, accommodation facilities, tourist flow, regional development, Shchuchinsk-Borovskaya resort area, Kazakhstan.

Кітім сөздер: курорттық аймақтар, туризм, орналастыру құралдары, туристік ағын, өнірлік даму, Шүчө-Бурабай курорттық аймасы, Қазақстан.

Ключевые слова: курортные зоны, туризм, средства размещения, туристский поток, региональное развитие, Шучинско-Боровская курортная зона, Казахстан.

Introduction. The development of resort areas occupies a special place in the system of the regional economy of Kazakhstan, since tourism combines the functions of a source of income, a tool for territorial development and a mechanism for diversifying the economic structure. In the context of increasing domestic tourism and the transformation of consumer preferences, the role of resort destinations is increasing, capable of accumulating steady demand and generating multiplier effects for related industries.

In this context, the Shchuchinsk-Borovskaya resort area is an illustrative example of a territory where natural potential, infrastructural development and state priorities of tourism policy intersect. At the same time, the expansion of tourist activity actualizes the scientific question of the relationship between economic results, the scale of tourist flow and the possibilities of infrastructural provision of resort areas. The relevance of the study is due to the need for an in-depth analysis of the dynamics of resort development not only through the prism of cost indicators, but also taking into account the physical volume of demand and infrastructural constraints. In the scientific literature, these aspects are often considered separately,

which makes it difficult to form a holistic view of the development trajectory of resort areas and reduces the applied value of the conclusions for regional management and investment planning.

The purpose of this study is to identify key trends in the development of resort areas in Kazakhstan with an emphasis on the Shchuchinsk-Borovskaya resort area based on a comprehensive analysis of the volume of accommodation services, tourist flow and infrastructure base.

To achieve this goal, the following tasks are being solved: analysis of the dynamics of the economic results of the accommodation facilities; assessment of changes in the number of visitors to resort areas; identification of the features of the development of the accommodation infrastructure and its relationship with tourist demand; formation of the author's interpretation of the identified trends in terms of sustainability and effectiveness of resort development.

The methodological basis of the research consists of methods of comparative and structural-dynamic analysis, as well as methods of analytical generalization of statistical data. The official data of the Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan, reflecting the state and dynamics of the tourism sector, were used as an information base. Statistical data processing was carried out using generally accepted methods of time series analysis and relative indicators, widely used in economic studies of tourism. The applied approach ensures reproducibility of the results and allows us to form reasonable conclusions of both scientific and practical significance.

Literature review. The development of Kazakhstan's resort areas has been actively considered in recent years in domestic and foreign studies, reflecting increased attention to tourism as a factor of regional economic growth. A significant body of work is devoted to the analysis of investment processes and institutional conditions of the tourism industry.

In particular, studies [1] and [5] have shown that investment activity in tourism in Kazakhstan is characterized by high territorial heterogeneity, and the effectiveness of investments is largely determined by the level of infrastructure readiness and the quality of regional management. At the same time, the focus is mainly on macroeconomic aspects, while the intra-sectoral differences of resort areas are limited. A separate area of research is related to the assessment of the tourist potential and environmental sustainability of the development of destinations.

The work [2] emphasizes the importance of the natural resource factor and the ecological balance for the formation of competitive tourist products, which is especially important for resort areas with a high recreational load. In a more applied context, the issues of sustainable development of the Shchuchinsk-Borovskaya resort area are considered in [6], where attention is focused on the coordination of economic interests and the preservation of natural capital. However, the quantitative dynamics of demand and infrastructure in such studies are usually secondary. A number of publications are focused on the analysis of general trends in the development of the tourism sector in Kazakhstan.

The studies [3] and [5] revealed key structural shifts in tourist flows and industry revenues related to the growth of domestic tourism and changes in consumer preferences. At the same time, these works are limited to aggregated indicators and do not allow us to trace the relationship between cost results, the physical volume of demand and the infrastructure base at the level of individual resort areas.

The specifics of the spatial organization of tourism in the Shchuchinsk-Borovskaya resort area are revealed in the study [4], which substantiates the role of tourist clusters as a tool to increase the competitiveness of the territory. Despite the value of this approach, the issues of loading dynamics and scaling of infrastructure in the face of growing demand remain insufficiently developed.

An additional context is formed by works on sustainable development and economic effects in Central Asian countries [7], however, they indirectly address tourism issues. The review shows that there is a methodological gap between macroeconomic estimates of tourism development and a detailed analysis of resort areas as independent socio-economic systems.

The relationship between the volume of services, tourist flow and infrastructure provision at the level of key destinations remains insufficiently investigated. These gaps justify the need for further research aimed at a comprehensive analysis of the dynamics of the development of the resort areas of Kazakhstan with a focus on the Shchuchinsk-Borovskaya resort area and an assessment of the factors of the effectiveness of using its tourist potential.

Main part. It is advisable to start analyzing the development of resort areas in Kazakhstan by assessing the dynamics of the volume of accommodation services as an integral indicator of the economic activity of the tourism sector. This indicator accumulates the influence of tourist demand, price levels, the structure of accommodation and the degree of involvement of territories in domestic and inbound tourist

flows. Long-term observations of the country's resort regions show that it is the dynamics of income in the accommodation sector that most sensitively reflects structural shifts in tourism organization and investment priorities of regional development (Figure 1).

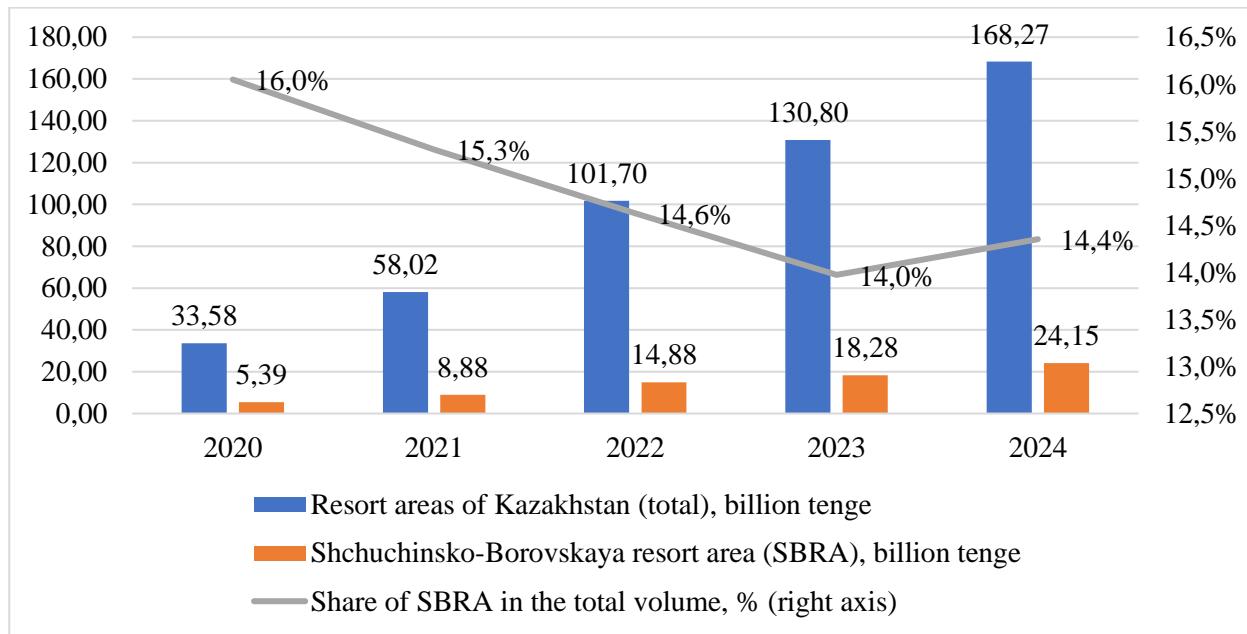


Figure 1. Dynamics of the volume of accommodation services in the resort areas of Kazakhstan and the Shchuchinsko-Borovskaya resort area*

*compiled based on data from [8]

As shown in Figure 1, in 2020-2024, the volume of accommodation services in the resort areas of Kazakhstan demonstrated a steady upward trend - from 33.58 billion tenge to 168.27 billion tenge. The growth was accelerating, especially in the post-pandemic period, which is consistent with empirical observations of the recovery of domestic tourism and the expansion of consumer demand for recreational services. Structurally, this growth reflects not only an increase in tourist flows, but also a gradual increase in the complexity of the service offer, an increase in the average cost of accommodation and an expansion of the range of related services.

During the period under review, the volume of services provided increased from 5.39 billion tenge in 2020 to 24.15 billion tenge in 2024, that is, more than four times. Such dynamics confirms the stable specialization of the SBRA as one of the key centers of resort tourism in the Shchuchinsko-Borovskaya resort area (SBRA) developed in the same trend, but with a more pronounced growth amplitude. During the period under review, the volume of services provided increased from 5.39 billion tenge in 2020 to 24.15 billion tenge in 2024, that is, more than four times. Such dynamics confirms the stable specialization of the SBRA as one of the key centers of resort tourism in the country.

The practical experience of regional research shows that it is in such areas that the scale effect begins to manifest itself earlier than in less developed resort areas, due to the concentration of infrastructure and the recognition of the destination. At the same time, the change in the share of SBRA in the total volume of services provided by the resort areas of Kazakhstan is more complex. In 2020, the zone's share was 16.0%, then consistently decreased to 14.0% in 2023, followed by a moderate increase to 14.4% in 2024. This trajectory does not indicate a weakening of the SBRA's position, but an accelerated development of other resort areas of the country. In the context of the expansion of the tourist map of Kazakhstan, the relative share of even the leading destinations is naturally adjusted, which is confirmed by similar processes observed in other countries with diversifying domestic tourism.

The interpretation of the results presented in Figure 1 allows us to conclude that a more balanced structure of the resort sector is being formed at the national level. The Shchuchinsko-Borovskaya resort area retains the status of one of the industry's flagships, providing a significant contribution to the total volume of services

Further deepening of the analysis requires a transition from cost indicators to an assessment of the physical volume of tourist demand. In this regard, the logical continuation of the study is to consider the

dynamics of the number of visitors served by the accommodation facilities, which makes it possible to clarify the sources of the identified growth and compare the economic results with the real tourist flows shown in Figure 2.

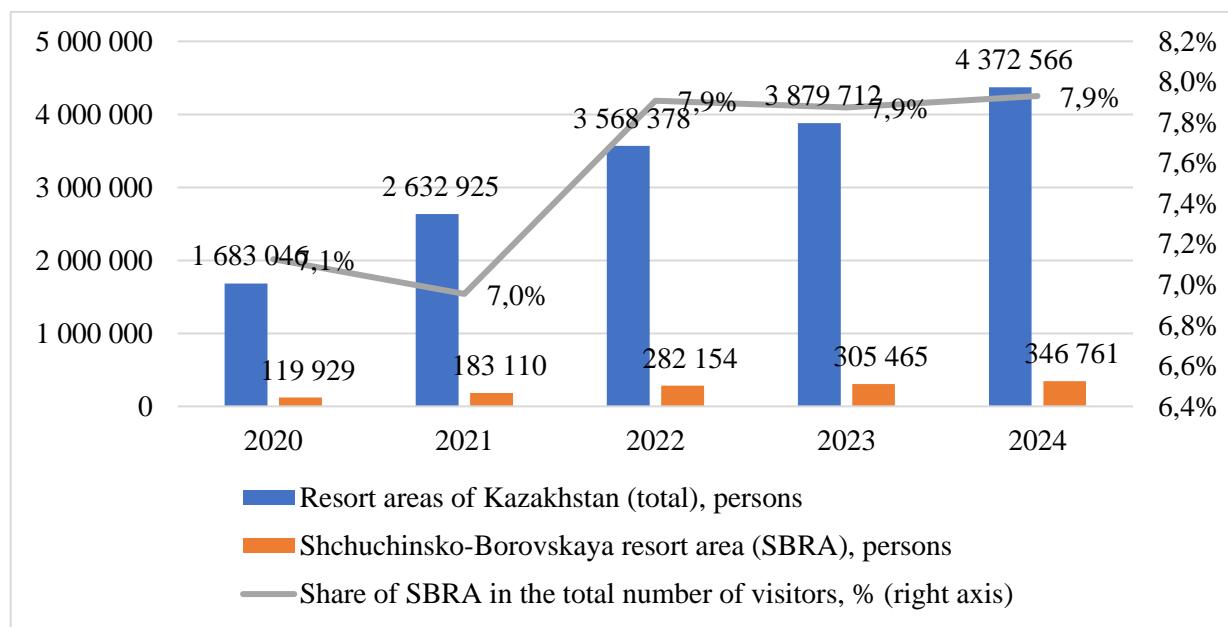


Figure – 2. Dynamics of the number of visitors served by accommodation facilities in the resort areas of Kazakhstan and the Shchuchinsko-Borovskaya resort area*

*compiled based on data from [8]

As follows from Figure 2, in 2020-2024, the number of visitors to the resort areas of Kazakhstan increased from 1.68 million to 4.37 million people. The most intensive growth was recorded in 2021-2022, which corresponds to the phase of active recovery of tourist activity after pandemic restrictions and increased domestic tourism. In subsequent years, growth continued, but its pace gradually stabilized, indicating a transition from recovery dynamics to a more stable development trajectory. The Shchuchinsko-Borovskaya resort area demonstrates a comparable but more concentrated growth in the tourist flow.

The number of visitors served by the facilities of the SBRA increased from 119.9 thousand people in 2020 to 346.8 thousand people in 2024, that is, almost three times. Such dynamics confirms the high adaptability of the zone to changing demand conditions and the sustainable attractiveness of the destination for domestic tourists. Field observations and analysis of regional tourism development programs show that it is the combination of natural potential and relatively well-developed infrastructure that allows the SBRA to return and increase tourist flows faster.

The change in the share of the SBRA in the total number of visitors to the resort areas of Kazakhstan is moderately volatile, but generally stable. In 2020-2021, the share of the zone was at the level of about 7%, in 2022 it increased to 7.9% and remained at this level until 2024. The stabilization of the share against the background of an overall increase in tourist flows indicates the preservation of the competitive position of the SBRA without signs of overheating demand or displacement from other resort areas.

From a scientific point of view, this result is interpreted as a manifestation of balanced growth, in which market expansion is accompanied by a relative preservation of structural proportions. A comparison of Figures 1 and 2 makes it possible to deepen the interpretation of the identified trends. The growth in the volume of services at the SBRA outstrips the increase in the number of visitors, which indirectly reflects an increase in average profitability per tourist and a gradual shift in demand towards higher-quality and capital-intensive forms of accommodation. Such a discrepancy is typical for resort areas entering a phase of qualitative development, where the economic effect is increasingly determined not only by the number of tourists, but also by consumption parameters.

The logical continuation of the analysis is the consideration of the infrastructure base that ensures the revealed dynamics of tourist flows. In this regard, it is further advisable to refer to the dynamics of the number of placements shown in Figure 3, which will allow us to assess the compliance of the growth rate of demand with the capabilities of the resort infrastructure.

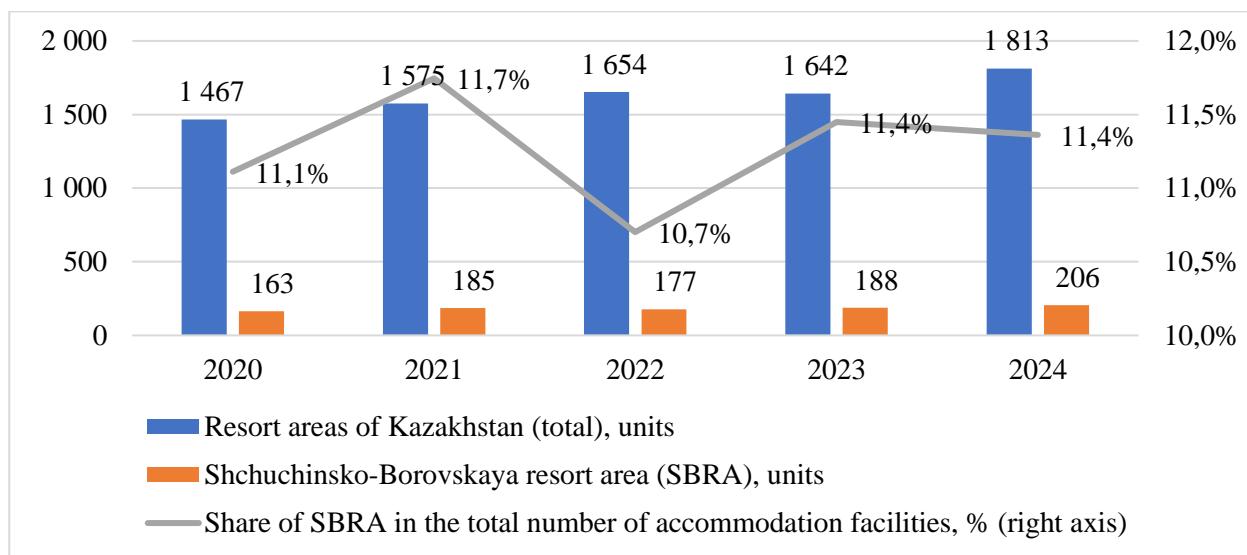


Figure – 3. Dynamics of the number of accommodation facilities in the resort areas of Kazakhstan and the Shchuchinsko-Borovskaya resort area*

* compiled based on data from [8]

The data presented in Figure 3 allows us to complete the logical chain of analysis, moving from demand indicators to an assessment of the infrastructure of resort tourism. The number of locations reflects the institutional and investment capacity of the resort areas, as well as the degree of industry's readiness to accommodate the growing tourist flows. In applied research on the development of resort areas, this indicator is considered as a key constraint or, conversely, a catalyst for further growth. In 2020-2024, the total number of accommodation facilities increased from 1,467 to 1,813 units.

The dynamics were uneven: after steady growth in 2020-2022, a slight decrease was recorded in 2023, followed by a noticeable expansion of infrastructure in 2024. Such fluctuations are typical for the resort sector, where investment decisions depend on demand expectations, the availability of financing and regulatory conditions, and the response of infrastructure to market signals is delayed in relation to changes in tourist flows. Shchuchinsko-Borovskaya resort area demonstrates a more smooth and progressive trajectory of infrastructure development. The number of locations increased from 163 units in 2020 to 206 units in 2024, reflecting sustained investment interest in the area. A slight decrease in the indicator in 2022 was replaced by a recovery growth, which together indicates the adaptability of infrastructure development to changing market conditions. The practice of regional analysis of resort areas shows that such dynamics is typical for zones that are in a phase of moderate, controlled expansion, without sudden jumps and overloading of space.

The change in the share of SBRA in the total number of locations of resort areas in Kazakhstan confirms the relative stability of its infrastructural positions. In 2020-2021, the zone's share increased from 11.1% to 11.7%, then decreased to 10.7% in 2022, after which it stabilized at 11.4% in 2023-2024. This configuration indicates the synchronous development of infrastructure in both the leading and new resort areas of the country, without a pronounced redistribution in favor of one center. A comparison of Figures 2 and 3 reveals an important feature of the development of the Shchuchinsk-Borovskaya resort area.

The growth rate of the tourist flow is outpacing the increase in the number of accommodations, which indicates an increase in the utilization of the existing infrastructure and an increase in its economic efficiency. Such a ratio, as empirical observations show, forms the prerequisites for a subsequent investment cycle focused on qualitative renovation and expansion of the room stock. Collectively, the results of the analysis presented in Figures 1-3 reflect the transition of the resort areas of Kazakhstan, including the Shchuchinsko-Borovskaya resort area, from the recovery stage of development to a phase of more sustainable and structurally balanced growth. The identified trends provide a basis for further discussion of the factors of efficiency of resort infrastructure use and ways to increase the competitiveness of key tourist destinations in the country.

Conclusion. The conducted research allowed us to form a holistic view of the dynamics of the development of the resort areas of Kazakhstan with an emphasis on the Shchuchinsk-Borovskaya resort area as one of the key tourist destinations of the country. An analysis of the volume of accommodation services, tourist flow and infrastructure base revealed a steady upward trajectory of the sector's development in 2020-2024, reflecting the transition from a recovery phase to a more stable growth model. It has been established that SBRA retains a significant role in the national structure of resort tourism, demonstrating a faster growth in cost indicators with a relatively stable share in the total tourist flow and accommodation infrastructure.

The scientific novelty of the obtained results lies in the complex interpretation of the relationship between the economic, demand and infrastructural parameters of the development of resort areas. It is shown that the increase in the volume of services in the SBRA outstrips the growth in the number of visitors and the expansion of infrastructure, which indicates an increase in the efficiency of using existing resources and a shift in emphasis towards the qualitative development of the tourist product. This conclusion complements the understanding of the patterns of spatial development of resort areas in the context of the diversification of domestic tourism.

The practical significance of the study is shown in the possibility of using the findings in the development of regional tourism development programs, planning investments in infrastructure and the formation of mechanisms for balanced territorial growth. The results can serve as an analytical basis for assessing the maximum load on resort areas and determining priorities for further expansion of the number of rooms.

The prospects for further research are related to an in-depth analysis of the utilization of accommodation facilities, the structure of tourist demand and an assessment of the economic effects of improving the quality of services, which will make it possible to more accurately substantiate strategies for the sustainable development of resort areas in Kazakhstan.

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ЩУЧЬЕ-БУРАБАЙ КУРОРТТЫҚ АЙМАҒЫНЫҢ ТУРИСТИК ДЕСТИНАЦИЯСЫНЫҢ ДАМУ ТЕНДЕНЦИЯЛАРЫ

Анната

Мақалада елдің негізгі туристік бағыттарының бірі ретінде Щучье-Бурабай курорттық аймағына баса назар аудара отырып, Қазақстанның курорттық аймақтарын дамыту қарастырылған. Пандемиядан кейінгі кезеңде курорттық аймақтарды орналастыру қызметтері көлемінің, келушілер санының және инфрақұрылымдық базасының динамикасы талданды. Туристік сұраныстың өсуімен және орналастыру құрылымының біртінде күрделенуімен қатар жүретін туристік саланың экономикалық белсенділігінің тұрақты кеңеюі анықталды. Щучье-Бурабай курорттық аймағы туристік ағынның динамикасымен салыстырғанда құндық көрсеткіштердің озық өсуін көрсетеді, бұл орташа табыстылықтың өсуін және орналастырудың негұрлым сапалы нысандарына сұраныстың ауысуын көрсетеді. Қызметтердің жалпы көлеміндегі және келушілер санындағы Щучье-Бурабай курорттық аймағының үлесі Қазақстанның курорттық секторының жалпы өсуі аясында салыстырмалы тұрақтылықты сақтайдыны анықталды, бұл туризмнің негұрлым тенденцияларын көңілкілдік құрылымын қалыптастыруды айғақтайды. Орналастыру орындары санының серпіні талданды, соның негізінде инфрақұрылымдық кеңею қарқынының туристік ағынның өсуінен артта қалуы анықталды, бұл қолданыстағы объектілердің жүктемесінің артуын және олардың экономикалық тиімділігінің өсуін көрсетеді. Әдіснамалық негіз ретінде салыстырмалы және құрылымдық-динамикалық талдау әдістері, сондай-ақ Қазақстан Республикасы Үлттық статистика бюросының ресми статистикалық деректерін Талдамалық жинақтау пайдаланылды. Шығындар, сұраныс және инфрақұрылымдық көрсеткіштердің кешенді салыстыру курорттық аймақтарды әлеуметтік-экономикалық жүйелер ретінде дамыту заныңдылықтарын толық ашуға мүмкіндік беретіні көрсетілген. Алынған нәтижелер туризмді

дамытудың өңірлік бағдарламаларын әзірлеу, инвестициялық шешімдерді негіздеу және Қазақстанның курорттық аумақтарын орнықты дамыту бағыттарын қалыптастыру кезінде пайдаланылуы мүмкін.

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ТЕНДЕНЦИИ РАЗВИТИЯ ТУРИСТСКОЙ ДЕСТИНАЦИИ ЩУЧИНСКО-БОРОВСКОЙ КУРОРТНОЙ ЗОНЫ

Аннотация

В статье рассмотрено развитие курортных зон Казахстана с акцентом на Щучинско-Боровскую курортную зону как одну из ключевых туристских дестинаций страны. Проанализирована динамика объема услуг мест размещения, количества посетителей и инфраструктурной базы курортных зон в постпандемийный период. Выявлено устойчивое расширение экономической активности туристской сферы, сопровождаемое ростом туристского спроса и постепенным усложнением структуры размещения. Показано, что Щучинско-Боровская курортная зона демонстрирует опережающий рост стоимостных показателей по сравнению с динамикой туристского потока, что отражает повышение средней доходности и смещение спроса в сторону более качественных форм размещения.

Определено, что доля Щучинско-Боровской курортной зоны в общем объеме услуг и количестве посетителей сохраняет относительную стабильность на фоне общего роста курортного сектора Казахстана, что свидетельствует о формировании более сбалансированной пространственной структуры туризма. Проанализирована динамика количества мест размещения, на основе чего выявлено отставание темпов инфраструктурного расширения от роста туристского потока, указывающее на повышение загрузки существующих объектов и рост их экономической эффективности.

В качестве методологической основы использованы методы сравнительного и структурно-динамического анализа, а также аналитическое обобщение официальных статистических данных Бюро национальной статистики Республики Казахстан. Показано, что комплексное сопоставление стоимостных, спросовых и инфраструктурных показателей позволяет более полно раскрыть закономерности развития курортных зон как социально-экономических систем.

Полученные результаты могут быть использованы при разработке региональных программ развития туризма, обосновании инвестиционных решений и формировании направлений устойчивого инновационного развития курортных территорий Казахстана.

