

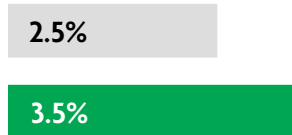
KAZAKHSTAN

2020 ANNUAL RESEARCH: KEY HIGHLIGHTS¹

GLOBAL DATA 2019



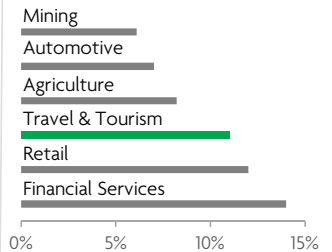
While the global economy grew by 2.5%,
Travel & Tourism grew significantly more at 3.5%



1 in 4 net new jobs were created by Travel & Tourism over the last five years



Global GDP impact by sector (2018 data). Share of total economy GDP



KAZAKHSTAN 2019 KEY DATA



CONTRIBUTION OF TRAVEL & TOURISM TO GDP

5.2% OF TOTAL ECONOMY

Total T&T GDP = KZT3,393.6BN (USD8,866.1MN)

+5.7%

2019 Travel & Tourism GDP growth vs **+3.4%** real economy GDP growth



CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

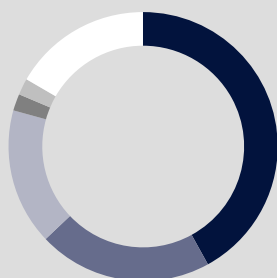
429.8 JOBS (000's)
(4.9% of total employment)



INTERNATIONAL VISITOR IMPACT

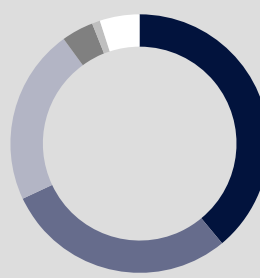
KZT1,103.7 BN
in visitor spend (**4.1%** of total exports)
(USD2,883.5MN)

INBOUND ARRIVALS



- 1. UZBEKISTAN **42%**
- 2. RUSSIAN FEDERATION **21%**
- 3. KYRGYZSTAN **16%**
- 4. AZERBAIJAN **2%**
- 5. GERMANY **2%**
- REST OF WORLD **17%**

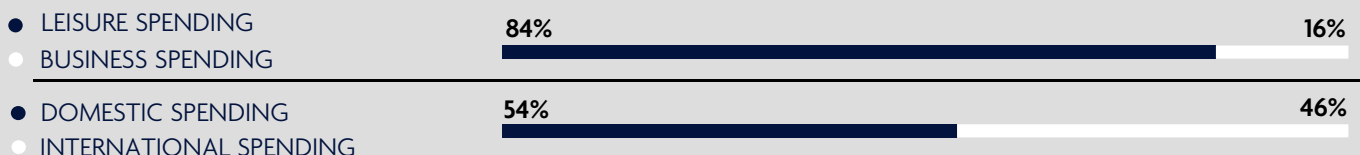
OUTBOUND DEPARTURES



- 1. RUSSIAN FEDERATION **39%**
- 2. KYRGYZSTAN **29%**
- 3. UZBEKISTAN **22%**
- 4. TURKEY **4%**
- 5. UNITED ARAB EMIRATES **1%**
- REST OF WORLD **5%**

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)



¹All values are in constant 2019 prices & exchange rates
As reported in March 2020