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Bachelor Thesis

Tourist Industry in Kazakhstan

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Thesis title

Tourist Industry in Kazakhstan

Objectives of thesis

The main goal of this bachelor thesis is to identify the current state of tourist market of Kazakhstan and find some perspectives for it's development. Also to determine the problems which influence current situation of tourist industry in Kazakhstan. Practical part reveals the current state of tourism services in the Republic of Kazakhstan with analyses of the development dynamics, tourist infrastructure and the most popular tourist places of the republic.

Methodology

The research methodology is based on analysis of the relevant literature dealing with the topic, statistic-factual methods, generalization, comparison.

Information base includes official statistic, informational and analytical materials, special reviews, prepared by regulating bodies, as well as scientific literature, mass media and internet publications.

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Tourism, Kazakhstan, economic analysis, business, development

Recommended information sources

Ashimbayeva A. T. Potential for development of tourism in Kazakhstan // Kazakh Pravda (newspaper) № 68 (27689) April 20, 2015

F.P. Noe, M. Uysal, V. P. Magnini Tourist Customer Service Satisfaction An Encounter Approach (Advances in Tourism) Oxon: Routledge Advances in Tourism. 2010. ISBN-13: 9780415578042

Page S. Tourism management. – 4th Edition. – Oxon: Routledge Advances in Tourism, 2011. ISBN: 9780080969329

Policy and Practice for Global Tourism. Published and printed by the World Tourism Organization, Madrid, Spain. 2011. ISBN-13: 978-92-844-1379-9

Strategies for development of tourist brunch of the Republic of Kazakhstan till 2020

<http://www.kit.gov.kz/> (official web-site of Committee of Tourist Industry of RK)

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Declaration

I declare that I have worked on my bachelor thesis titled "Tourist Industry in Kazakhstan" by myself and I have used only the sources mentioned at the end of the thesis. As the author of the bachelor thesis, I declare that the thesis does not break copyrights of any their person.

In Prague on 15th of March 2017

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Turistický Průmysl v Kazachstánu

Souhrn

Tato bakalářská práce se zaměřuje na turistický průmysl Kazachstánu. Teoretická část práce poukazuje na povahu cestovního ruchu pomocí různých definicí a detailním rozbohem klasifikace různých turistických forem a typů. Dále práce obsahuje posouzení efektivity fungování turistického rámce ve vztahu k ekonomice země a analýzu služeb světového cestovního ruchu, které mohou pomoci rozvoji turismu v Kazachstánu. Analytická část pak sestává z analýzy dynamiky vývoje cestovního ruchu Republiky Kazachstánu v posledních letech. V praktické části autorka navrhuje způsoby vylepšení propagace Kazachstánu jako třeba: zlepšení školení personálu, vytvoření unikátního turistického obrazu Kazachstánu, modernizace mechanismu státní správy v oblasti cestovního ruchu, protože k dalšímu vývoji turistického ruchu je zapotřebí spolupráce soukromého a státního sektoru.

Práce dochází k závěru, že cestovní ruch v Kazachstánu má určitý potenciál, k jehož rozvoji je ale potřeba poměr vysokých investic a to hlavně do marketingu, zlepšení infrastruktur a vývoje komplexního strategického plánu.

Klíčová slova: Turismus, rozvoj, klastr cestovního ruchu, partnerství soukromého a státního sektoru, infrastruktura, trh cestovního ruchu, reklama, analýza, příspěvek do HDP

Tourist Industry in Kazakhstan

Summary

In this bachelor thesis the Tourist Industry of the Republic of Kazakhstan is considered.

The theoretical part highlights the nature of tourism, giving its definitions and presenting a detailed classification of the tourism's forms and main types. In addition, it includes an efficiency assessment of the creation and functioning of the tourism cluster within the economics of the country as well as an analytical overview of the world tourism services and directions for development of the world tourism market. The Analytical part involves the analyses of the development dynamics of the tourism market of the Republic Kazakhstan over the last years. In the practical part, the author proposes ways for promotion of the tourist branch of RK, such as: improvement of staff training system, creation of special tourist image of Kazakhstan, modernization of state management mechanism in the tourism sector of economy, as only in cooperation of state and private business can tourism could be developed.

The work concludes, that tourism in the Republic of Kazakhstan has a certain potential, but its development needs considerable investment in advertising, improvement of infrastructure and a comprehensive strategic plan.

Keywords:

Tourism, development, tourist cluster, state-private partnership, infrastructure, tourism market, tourist product, promotion, analyses, contribution to GDP.

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1. Introduction

Over the last year's tourism services have seen intensive development throughout the world. Tourism has a huge potential for growth, considerably more than many other branches of economy. Kazakhstan tourist market is in the process of entering in the international sphere of tourism, leisure and hotel services, this presents complex organizational, technical and economic processes. Demanding not only various knowledge in the field of tourism, professionalism in tourist and excursion activity, but also promotion of attractiveness of the Kazakhstan tourist market to foreign tourists.

Market research of the tourist services market create a basis for effective use of territorial capacities of the country, as initially market research in tourism is directed not only to studying of demand and definition of the potential clients, but also to formation of the demand taking into account development and use of the available tourist capacity of certain territories.

The government in the long-term development program for Kazakhstan, has identified the tourism brunch to be a priority. Modern industry of tourism is one of the largest highly profitable and dynamically developing segments of international trade in services. Tourism has a considerable impact on all sectors of economy and welfare of the society.

Tourism in the Republic of Kazakhstan is a priority direction. The main goal of tourism development in Kazakhstan is the creation of modern, highly effective and competitive tourist complex, on the basis of which the conditions for development of this branch (as sectors of economics) will be provided, allowing integration into system of the world tourist market and development of further international cooperation in tourism. Considering that Kazakhstan has a unique natural potential and resources, the country has all the opportunities for development of different types of tourism: cultural, informative, educational, ecological, extreme, business, recreational and others.

2. Goals and Methodology

2.1 Goals

The main goal of this work is to characterize the current state of tourist market of the Republic of Kazakhstan and outline the perspectives for its development.

The set goal involves the number of objectives:

- to give classification of the tourism forms and its main types;
- to carry out the efficiency assessment of creation and activity of tourism cluster in economics of the country;
- to evaluate the world trade of tourism services and present tendencies of development for the world tourism market;
- to ground the state/private partnership to be an instrument of state management of tourism sector;
- to evaluate the development dynamics of the tourism market of the Republic of Kazakhstan over the last years;
- to describe of tourism infrastructure of the Republic of Kazakhstan;
- to give characteristic of main touristic places of Kazakhstan;
- to reveal some perspectives for development of the tourism sector in the Republic of Kazakhstan, which include:
 - improvement of staff training;
 - modernization of state management mechanism in tourism sector of economic;
 - positioning of Kazakhstan in the world tourist market and development of touristic image;
 - marketing and promotion of Kazakh tourist product.

2.2 Methodology

The research methodology is based on the analysis of the relevant literature dealing with the topic, statistic-factual methods, generalization, comparison.

Information base includes official statistic, informational and analytical materials, special reviews, prepared by regulating bodies, as well as scientific literature, mass media and internet publications.

3 Theoretical part

3.1 Nature of the tourism and its basic tendencies for development

3.1.1 Classification of the tourism's forms and its main types

Tourism (French – “tourisme”, from the word “tour” – walk, trip) – on the one hand is a rather young phenomenon, that acquired a mass character only after the IInd World War, and on

the other hand – has deep historical roots¹. Tourism in its initial sense was understood as a movement and temporary stay of people out of the permanent residence. However, in the course of historical development contents and sense of this concept constantly underwent changes and additions.

In the year 1993 United Nations Statistical Commission has accepted the definition approved by the World Tourism Organization and which is widely used in the international practice. According to that tourism covers activity of persons, who travel and stay in the places, which are outside of their usual environment during the period, which isn't exceeding one year in a row for the purpose of rest, business and other purposes ².

Classification of tourism – is an allocation of internally uniform groups of tourist activities under the accepted basis.

Type of tourism – is a result of classification of tourism under these or those bases³.

As the sign, allowing to classify travels by types of tourism, it is possible to use motivating factors. At such classifications it is necessary to proceed from the main motive, which has induced the person to go to on a trip. Though motives aren't always defined unambiguously, nevertheless it is possible to allocate six types of tourism in the system of its management.

Table 1 Types of tourism

Tourism for the purpose of rest	This type consists in short-term or longer rest for the purpose of physical or psychological recovery of an organism. Besides, resort rest, at which for treatment or restoration of forces natural properties of the soil, climate and sea water are used, are also included in this group.
Tourism for the purpose of studying the culture	The tourism, focused on studying of foreign culture, is subdivided on informative and pilgrim tourism. Informative tourism covers visit of historical, cultural or geographical sights. The tourists, traveling with the informative purpose, most often are interested in the social and economic relations of the countries visited by them. The purpose of pilgrim tourism is a visit of the places having special religious value.
Public tourism	Trips for the purpose of visiting relatives, friends, and also club tourism. In Club tourism the travelers are consciously integrated into

¹ Weaver, D. and Lawton, L. Tourism Management, 2014 (5th edition), Milton: Wiley.

² Page S. Tourism management. – 4th Edition. – Oxon: Routledge Advances in Tourism, 2011.

	groups. People are united into groups in case of some entertainment or sports program, they are interested in.
Sports tourism	Trips for the purpose of active participation in sport events, and also trips, which have passive character of participation in sports competitions.
Economic tourism	Trips with professional and commercial purpose: visiting of the exchanges, exhibitions, fairs etc.
Congress (political) tourism	This type is subdivided into diplomatic tourism, participation in the congresses, and also the tourism connected with political events and actions.

The table is compiled on the basis of the resource³

Sometimes tourism is specified under the forms with various durations of the trips (long and short trips). In this case the period of stay in a trip is chosen as the main criterion of such classification. If trips differ by such external criterion as stay duration, it is possible to say, that these trips (travels) belong to various forms of tourism. There are many opportunities allowing to allocate tourism forms by external criteria: under origin of tourists; under organizational form; under duration of stay in a travel; under age; under type of transport; under season.

At first sight there is no big difference between forms and types of tourism. In both cases the trips are grouped proceeding from certain points of view. The difference is, that types of tourism differ under motivation of the travelers, i.e. on internal factors, and tourism forms – under the external reasons and influences, what is very important for management.

Tourism forms depending on an origin of tourists. In this case tourism is subdivided into domestic and international. In this case the word "origin" belongs not to the nationality or the birthplace of the person, but to the place of his residence and works⁴.

Tourism forms depending on its organization (organizational forms). This form distinguishes the lump-sum (providing a complex of services for one price) and individual tourism. A lump-sum tour is a standardized, previously organized complex of tourist services. In case of individual tour, the tourist organizes and carries out the trip by himself independently. Similar tours are called also single, but it doesn't mean that it is necessary to travel alone, it is possible to travel also with a family, and at the same time the travel is called single.

Tourism forms depending on duration of stay. Very important classification of tourism forms is their classification depending on duration of stay.

³ Alejandro D. Ramos and Pablo S. Jimenez. Tourism development: economics, management and strategy. Nova Science Publishers, Inc. New York. 2008.

⁴ Cathy A. Enz. Hospitality Strategic Management: Concepts and Cases 2nd Edition. Published by Wiley. 2010.

Duration of a travel is the time, which is spent by the tourist during a trip or stay in the visited place or the country. One-day travel is classified as follows: less than three hours; three-five hours; six-eight hours; nine-eleven hours; twelve and more hours. Travel with spending the night can be classified as follows: 1-3 nights; 4-7 nights; 8-28 nights; 29-91 nights; 92-365 nights.

Long-term travel is, as a rule, supplemented with short-term trips. Short-term trips include: transit trips, one-day trips. Transit tourism - is stops of tourists on the way to the destination.

Short term tourism (including business tourism) involves the requirement for overnight accommodation. The average duration of trips is usually between two and four days and can include weekends. These trips will necessitate at least one or several overnight stops⁵.

Tourism forms depending on age of travelers. At classification of tourism forms the age of travelers is also considered. The following groups of tourists are determined by an age scale: the children traveling with the parents; youth (tourists at the age of 15-24 years); rather young people, economically active people of 25-44 years; economically active people of an average age (45-64 years), travelling, as a rule, without children; pensioners (65 years and more senior).

Tourism forms depending on transport type. Depending on the transport, used for movement of tourists from one place to another the following tourism forms are differentiated: air-tourism, bus, railway, automobile and sea.

Tourism forms depending on season. This group allocates winter and summer tourism. Seasonal classification of tourism forms shows fluctuations of demand for tourist services within a year. Time in which the maximum quantity of trips is made is called a tourist season, the period of recession of travel – off-season. Tourist seasons in different regions cannot coincide⁶.

Beside the offered six criteria there are also other points of view allowing to classify the trips under forms. The World tourism organization suggests to classify tourism by the following types: domestic tourism – travel of inhabitants of any region within this region; inbound tourism – travels over any country of the persons, who aren't its inhabitants; outbound tourism – travels of residents of any country to other country. These main types of tourism can be combined differently, forming categories of tourism.

⁵ Arch G. Woodside and Drew Martin. *Tourism Management Analysis, Behavior and Strategy*. CAB International 2008.

⁶ TOURISM AND ENTREPRENEURSHIP International Perspectives. Edited by Jovo Ateljevic and Stephen J. Page. Routledge. 2009.

3.1.2 Efficiency assessment of creation and functioning of tourism cluster in economics of the country

The concept or term "cluster" is commonly used in the tourism industry when describing inter-related and/or multi-venue enterprises within a concentrated area. The purpose of creation of tourist clusters is an increase in competitiveness of the region in the global tourist market due to the synergetic effect received as a result of increase in overall performance of the enterprises included in a cluster, stimulations of innovative and investment activity. Actually, tourist cluster defines image of the region and influences its positioning ^{7, 8}.

At making decision on expediency for cluster development of tourist sector it is necessary to consider that special feature of this sector is a complexity of tourist services. This service consists of set of material and non-material services, which are a specific tourist product. These separate tourist services have a supplementing character. They, as a rule, are carried out by various companies, offering them. The enterprises, rendering a complex of tourist services, highly depend on each other. Therefore, it is necessary to develop partnership and cooperation of tourist business participants ⁹.

Numerous partners in business, whose wellbeing is in direct dependence on results of its activity, are greatly interested in a progress of the touristic company.

The main partner groups of the tourist enterprise are the following:

- 1) Owners of the company.
- 2) Investors.
- 3) Creditors.
- 4) Employed managers.
- 5) Employed personnel.
- 6) Suppliers of means and objects of the labor.
- 7) Consumers (clients).

⁷ Drozdetskaya A.A. Formation of tourism clusters at border territories. // Current problems of science and education. – 2013. - №2. – p. 545-553

⁸ Beissebinova A.Sh. Cluster approach in realization of projects of state-private partnership // Materials of international scientific-practical conference "Economics and management: problems and solutions." November 21, 2011

⁹ Innobarometr on cluster's role in facilitating innovation. Analytical report. [Electronic resource]. – <http://cordis.europa.eu/innovation/en/policy/innobarometer.htm>

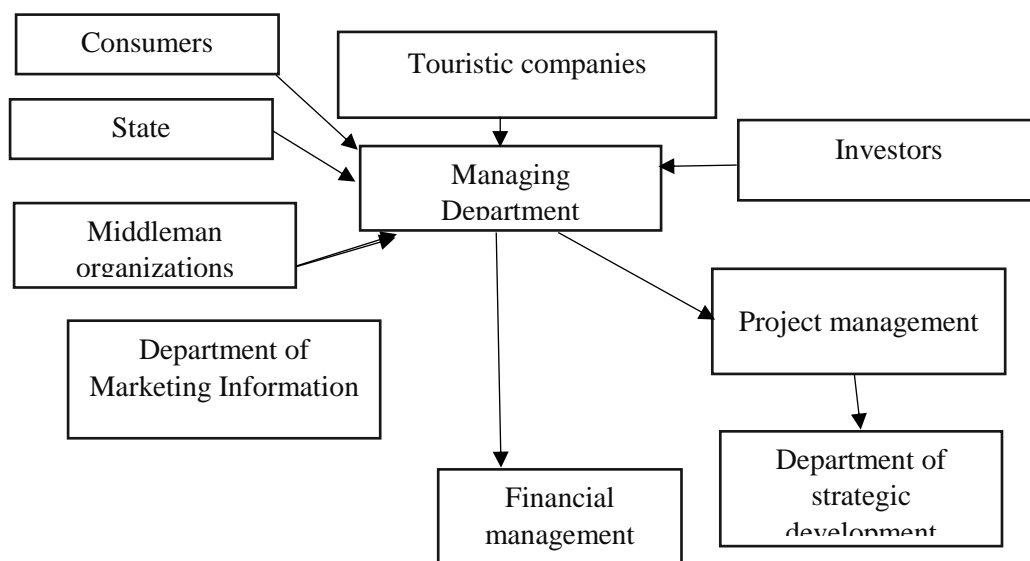
8) Society and State ¹⁰.

Secondary partner groups – are the groups, which are directly not interested in progress of this tourist enterprise: insurance companies, audit and consulting agencies, law agencies, associations, mass media, labor unions, regulating bodies etc.¹¹

The structure of a tourist cluster is schematically presented by Figure 1.

Strategic goal of tourist cluster creation is a formation of competitive tourist and recreational branch. In this case a tourist cluster influences the development of several branches. First, provides demand of consumers for tourist services, satisfying their requirements, and secondly promotes social and economic development of the country, increasing the income in the budget, promotes injection of investments into allied industries, creates additional jobs, influences improvement of the nation, preservation and rational use of historical and cultural heritage and environmental protection¹²

Figure 1 Institutional structure of tourist cluster



¹⁰ Kizim A.A., Valvashov A.N., Kulkova I.V. Increase of investment attractiveness of the region on the basis of the tourist cluster development // Regional economics: theory and practice. - 2010. - №26 (161). - p.52-59.

¹¹ Europe 2020: A strategy for smart, sustainable and inclusive growth. Communication from the commission. // European Commission. – Brussels. – 3.03.2010. – 32 p.

¹² Regional Competitiveness of Tourism Cluster: a Conceptual Model Proposal [Electronic resource]. <http://mpr.ub.uni-muenchen.de> (on-line 10.04.2012).

Note – this scheme was compiled on the basis of the resources ^{13, 14}.

For efficiency assessment of tourist cluster activity, a system of qualitative criteria is applied:

- economic;
- scientific and technical;
- social;
- ecological.

Formation of a tourist cluster has to be started by the initiative of the concrete economic entities, located in territories and is territorially adjacent:

- carrying out a complex marketing research in the respective territory, which covers real and potential participants of a cluster.

- formulation of a main goal of a tourist cluster. This is a traditional increase in competitiveness of a tourist product;

- creation of a tourist cluster structure, considering classification of criteria for evaluation of clusters activity;

- state registration of a tourist cluster ¹⁵.

Effective functioning of regional tourist clusters is an important step in justification of economic feasibility of economic entities functioning, basic subject to regional division of labor, a condition for formation of regional, national and international cluster systems. As indicators of cluster efficiency should be uses various parameters, which could be united in groups depending on assessment object:

- indicators, which measure the general results of activity of a cluster (growth of number of companies, number of the employees, volume of the output, export volume, etc.);

- indicators, which characterize influence of a cluster on development of the territory or branch, on economy;

¹³ Zyryanov A.A. Geographic field of tourist cluster // Tourism and regional study. – 2012. - №1(20). – p. 96-98.

¹⁴ Kol O. Conceptual basis for cluster formation of tourist business structures of inbound tourism in a big city // Current problems of science and education. – 2010. – №1(33). <http://www.m-economy.ru/art.php?nArtId=3043>.

¹⁵ Fedorets I.N. Efficiency assessment of tourist cluster activity. // Vector of the science. Series «Economics and management». – 2011. - №1 (4). – p. 42-45.

- indicators, estimating activity of each company, interacting within a cluster;
- indicators of use efficiency for separate types of resources;
- indicators, estimating influence of cluster structure on development of economic interconnections¹⁶.

Consequences of tourist cluster formation are presented in Table 2.

Table 2 Activity assessment of tourist cluster

Sector for assessment	Expected results	Assessment indicators
Service delivery	1) attraction of investments 2) increase in volumes of delivered tourist services 3) optimization in use of general resources 4) decrease of prime-cost 5) creation of new types of services 6) increase in number of the tourists, including foreign tourists 7) expansion of sales markets 8) decrease of risks - volume of attracted investments	- revenues from sales; - cost-effectiveness; - change in the share cluster product at world market; - number of new products and services; - change in cluster share, presented in regional gross product
Client servicing	1) increase in volume of delivered services 2) increase of profit 3) additional advertisement 4) expansion of client base 5) entering the new markets for educational institutions	- providing the graduates by working places, additional financing - revenues from sales; - cost-effectiveness; - number of new markets, to which the product of the cluster is delivered; - changes in number of the economic agents of the cluster; - level of investments.
Support of functioning	1) increase in volume of delivered services 2) increase of profit 3) decrease of prime-cost 4) creation of new working places 6) development of marketing strategy 7) decrease in costs of advertising campaign 8) decrease of logistics costs 9) cost-profitability	- profit (increase, losses); - revenues from sales; - cost-effectiveness; - number of new working places; - increase in volume of tax incomings; - number of newly created companies; - efficiency of advertising costs in comparison with “pre-cluster” period;

¹⁶ Gumilar V. Methodology for R&D driven cluster development in construction sector. – ASM (Poland), 2010. – 121 p

		- prime-cost
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Note – compiled on the bases of the resource¹⁷

In table 2 the complex assessment of cluster activity is defined as a result of a combination of the indicators, created on the basis of different classification approaches to criteria for evaluation of tourist sector: social and economic values, qualitative and quantitative parameters, factors of extensive and intensive development, etc.

Clustering method creates a regime of economy due to association of opportunities of all enterprises and finding of the most effective method of services promotion in the market. High efficiency for the use of materials and resources, creation and application of highly effective technological processes is provided inside the cluster. Formation of economic clusters is the important and objectively caused process, which promotes improvement of organizational and production structure of economy and improvement in dynamics of its development.

Definition of functioning effectiveness of cluster systems is an important factor of their development¹⁸.

Proceeding from the aforesaid, it should be noted that the tourist cluster is one of forms of the organization of productive forces of all participants of this model, which provides creation of a new tourist product on the basis of marketing communications in tourism that will allow them to compete successfully in the tourist markets of different levels.

3.1.3 Analyses of the world trade of tourism services and tendencies of development for the world tourism market

Tourism is an actively developing industry in the world, which is of a great importance for development of economy of many regions and countries of the world. Besides, financial turnover of tourist sector involves 2 trillion US dollars, each 8th employee in the world works in the tourist sphere. A third of the survey participants identify that the tourist market constitutes the main part of the national profit, approximately 80 countries state that Tourism revenues are included in the top five revenue generators pertaining to those countries. Recently, some countries introduce a visa-free regime as a mechanism for stimulation of inflow of foreign tourists.

¹⁷ Porter, M. E. Location, Competition, and Economic Development: Local Clusters in a Global Economy. Economic Development Quarterly, no. 4 (1) (2000).

¹⁸ Trebukh A.A. Touristic cluster as a form of strengthening of competitive advantages of the region. // Scientific messenger SUPU of Ukraine. – 2010. – p. 265-270.

First of all, the tourist market is a system of the relations (economic, social, legal), which in its turn connects producers of tourist services and consumers. The market of world tourism often changes, as today consumers like one tendencies (countries), then tomorrow these preferences could be exchanged.

Today, the greatest number of tourists is fixed in the European region in connection with objective historical and socio-economic factors.

The World Tourist Organization (UNWTO) predicts increase in number of the international tourist arrivals by 2020 that will make more than 1,5 billion people, from whom 1,18 billion people will travel within their regions (Europe, America, Africa, etc.), other 377 million people will make distant trips to other regions of the world. However, during the considered period distant trips to other regions of the world will grow quicker, than travel within the regions. At the same time the following distribution of tourists under regions is expected: the leading place will keep the Europe – 717 million tourists, the second place will be taken by East Asia / the Pacific region – 397 million tourists, the third one will be occupied by America – 282 million tourists, it will be followed (in decreasing order) by Africa, the Middle East and the Southern Asia.

Each tourist market, each country is interested and aimed at attracting of bigger number of consumers, which are tourists. For this attraction different methods, including a method of branding of the territories, are used.

One of effective methods for promoting of the territory and attraction of tourist flows to the territory – is Event Tourism. Event tourism attracts foreign tourists on certain exclusive events. What is necessary for holding these events? First of all, it is a creative approach.

It is necessary to emphasize that progress of many countries in tourism development is connected, first of all, with holding large international events. Both sports, and cultural events.

It is possible to demonstrate these events on the international stage; examples: Oktoberfest, the Formula One Motor Sport, a theater festival in Avignon, opera festivals at the open air Roman Amphitheatre of Verona, the European festival of balloons, Disneyland in Orlando, etc. Kazakhstan also has a capacity for the organization of the unique actions, for example EXPO 2017.

One more world tendency is called Ecotourism. It relates to the fact that most of Europeans live in the densely populated urbanized areas. This substantially forms tourist preferences in the direction of rural tourism, short-term rest, rest out of a high season, active types of tourism, short-term trips to other cities with the informative purposes, the choice of tours with accommodation not in hotels, and in apartments with self-service, etc.

In 2016 the World Tourism Organization has made, taking into account 140 countries, the new rating of the most attractive countries for tourists. Switzerland became the leader. It is followed by Germany and Austria. Also, this top-ten includes Spain, Great Britain, the USA, France, Canada, Sweden and Singapore. Kazakhstan in this rating takes the 88th place. It is 5 points higher, then in 2013.

Table 3 Competitiveness ratings over countries

	2016	2013
Switzerland	1	1
Germany	2	2
Austria	3	4
Spain	4	8
Great Britain	5	7
USA	6	6
France	7	3
Canada	8	9
Sweden	9	5
Singapore	10	10
.....		
Kazakhstan	88	93

Source: data of UNWTO World Competitiveness Report 2016

Brief characteristics of the countries:

Switzerland – continues to be the leader in this rating as the level of all aspects of this index is at the highest level. Infrastructure of Switzerland, in particular for the land transport – is the best in the world. Besides, the country can provide the high level of accommodation, qualified personnel and it isn't surprising as the country pays close attention to personnel training, and also their improvement.

Switzerland attracts tourists with its rich natural resources, the most part of the country is under ecological protection. Besides, Switzerland annually holds exhibitions and fairs on different subjects for attraction of tourists.

Germany occupies the 2nd place. As well as in Switzerland, Germany owns one of the best infrastructures in the world, including the land transport and air transport, and it facilitates access to the country. Germany has a rich cultural heritage (the 5th place by quantity of cultural heritages worldwide), and accepts nearly 600 international fairs and exhibitions in a year. The cost of residence in Germany is rather competitive.

Besides, Germany makes huge efforts on development of requirements about safety of the environment.

Austria takes the 3rd place, increase on one-line item in comparison with 2013. First of all, this country pays the attention to the hospitable attitude towards tourists, to their safety. Also as well as the leading countries, Austria has rich cultural resources. Without fail, holds fairs and exhibitions annually, and develops the tourism industry.

Competitiveness rating of the countries on regions (Top 10) is as follows:

Europe

Table 4 Competitiveness Ratings of Europe

Country	Resulting index			Sub-indexes					
				Legal framework		Business, environment, infrastructure		Human, cultural and natural resources	
	Place in region	Place in the world	Index	Place	Index	Place	Index	Place	Index
Switzerland	1	1	5.66	1	5.94	1	5.42	2	5.63
Germany	2	2	5.39	8	5.57	6	5.29	7	5.31
Austria	3	3	5.39	2	5.8	11	5.11	9	5.24
Spain	4	4	5.38	14	5.48	5	5.3	6	5.36
Great Britain	5	5	5.38	17	5.44	10	5.13	3	5.57
France	6	7	5.31	9	5.56	7	5.18	11	5.2
Sweden	7	9	5.24	12	5.54	23	4.89	8	5.3
Netherlands	8	13	5.14	16	5.45	15	5.01	16	4.97
Island	9	16	5.10	3	5.77	13	5.06	36	4.47
Finland	10	17	5.10	5	5.74	22	4.89	24	4.65

Source: data of UNWTO World Competitiveness Report 2016

As we see, Switzerland is the absolute leader practically in all indicators thanks to not only the appeal in respect of the nature, but also thanks to the developed infrastructure, high degree of legal security of tourists, the high level of service. Germany is considered one of the safest tourist countries in the world. In Germany tourism both for the citizens, and for foreigners is developed. According to statistical data, 30% of Germans prefer to have a rest within the country. Such countries as Great Britain and France are on the 5 and 6 places because of comparatively high cost of visit, as for many tourists they are very interesting and desired, but not available at the price.

America

Table 5 Competitiveness Rating of America

	Resulting index		Sub-indexes
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Country				Legal framework		Business, environment, infrastructure		Human, cultural and natural resources	
	Place in region	Place in the world	Index	Place	Index	Place	Index	Place	Index
USA	1	6	5.32	44	4.95	2	5.36	1	5.56
Canada	2	8	5.28	27	5.27	8	5.17	5	5.39
Barbados	3	27	4.88	13	5.5	18	4.96	50	4.2
Panama	4	37	4.54	54	4.83	36	4.52	45	4.29
Mexico	5	44	4.46	83	4.43	61	3.92	15	5.02
Costa Rica	6	47	4.44	52	4.88	56	3.98	38	4.45
Brazil	7	51	4.37	82	4.43	76	3.57	12	5.1
Puerto Rico	8	52	4.36	40	4.99	43	4.33	81	3.75
Chile	9	56	4.29	53	4.87	53	4.07	65	3.94
Uruguay	10	59	4.23	31	5.18	78	3.53	62	3.97

Source: data of UNWTO World Competitiveness Report 2016

The huge country of USA can surprise both beginners, and skilled travelers. In such cities as New York, Los Angeles and Las Vegas the flow of tourists doesn't stop all the year round. In 29 states of the USA tourism is the main of the branches, bringing good income to state treasury. The biggest flows of tourists come to the USA from Mexico, Canada, Great Britain. According to statistical data, by 2025 the USA will earn by 2,5 trillion US dollars on tourism. The last years travel business on the island of Barbados gains steam more and more. The island of Barbados is in huge demand for tourists at all seasons of the year. The island is visited by vacationers and tourists as in winter months, and in the summer. Many celebrities, such as film actors, musicians, politicians and others come for rest also here. Barbados is not only beautiful nature, but also surprising clean air, and healthy climate. If to look at statistical data, then Barbados is famous for the its long-livers.

Asia-Pacific Region

Table 6 Competitiveness Rating of Asia-Pacific Region

Country	Resulting index			Legal framework		Sub-indexes			
	Place in region	Place in the world	Index	Place	Index	Business, environment, infrastructure		Human, cultural and natural resources	
	Place in region	Place in the world	Index	Place	Index	Place	Index	Place	Index
Singapore	1	10	5.23	6	5.74	4	5.31	25	4.64
Australia	2	11	5.17	23	5.32	25	4.81	4	5.39
New Zealand	3	12	5.17	4	5.75	12	5.06	22	4.69
Japan	4	14	5.13	242	5.31	24	4.86	10	5.22

Hog Kong	5	15	5.11	19	5.43	3	5.32	29	4.59
Korea	6	25	4.91	38	5.02	17	4.98	20	4.74
Taiwan	7	33	4.71	29	5.19	34	4.63	44	4.29
Malaysia	8	34	4.70	55	4.82	41	4.36	17	4.93
Thailand	9	43	4.47	76	4.47	44	4.25	23	4.68
China	10	45	4.45	71	4.5	63	3.77	13	5.09
...		...							
Kazakhstan	18	88	3.82	62	4.66	79	3.48	119	3.3

Source: data of UNWTO World Competitiveness Report 2016

Tourism in Singapore is the largest branch of economy of Singapore. Singapore attracts tourists with its ecological purity, programs of cultural and historical heritage preservation. The country has one of the lowest crime rates in the world. Singapore seeks to be business center of Southeast Asia. There are a lot of multi-storied shopping centers, located near Orchard Road, which is the center of tourism.

Tourists in Australia can justify any purpose of visit as the country is very diverse: beach rest on the islands of the Great Barrier Reef, extreme sports, visit of national parks and observation of the environment, a trip to wine-making regions or acquaintance to culture of natives. New Zealand is one of the most environmentally friendly countries of the world. New Zealand is the last place on the earth where it is possible to see animals and plants, which have stopped the existence long ago.

Exporters of tourist services

Ten countries – leaders in the income from the international tourism in 2015 was headed by the USA from shares in 15% or 163 m. US dollars. It is followed by Spain, France and China, which have shares of 5%, at the same time only China from these three countries increases demand to the region.

In recent years Thailand and Hong Kong demonstrate dynamic in growth – the demand to visit these countries is 24% and 16% respectively.

Table 7 Countries-leaders under incomes from tourism, mill. US Dollars

Exporters	2011	2013	2015	Gain	Share
All countries	957.1	947.5	1 076.6	2%	100%
1 USA	139.1	134.2	162.8	9%	15%
2 Spain	61.4	52.5	55.9	-6%	5%
3 France	56.3	46.9	53.7	-1%	5%
4 China	40.8	45.8	50.0	3%	5%
5 Italy	45.5	38.7	41.2	-4%	4%
6 Germany	39.8	34.6	38.1	-2%	4%

7 Great Britain	36.0	32.4	36.6	4%	3%
8 Thailand	18.2	20.1	33.6	24%	3%
9 Hong Kong	15.3	22.2	32.1	16%	3%
10 Turkey	22.0	20.8	23.8	3%	2%
other countries	504.7	520.1	572.4	1%	53%

Source: data of UNWTO World Competitiveness Report 2016

Under quantity of the arrived tourists France is the leader with a number of the visitors - 82 m. persons. USA in its turn is at the 2nd place (63 M. people). The 3rd place is occupied by China with a volume of 57 M. people. This list is followed by Spain, Italy, Turkey, Germany, Great Britain, Russia and Malaysia.

Table 8 List of countries, leading under quantity of the arriving tourists, M. persons

	2014	2015
1 France	81.6	83
2 USA	62.7	67
3 China	57.6	57.5
4 Spain	56.2	57.7
5 Italy	46.1	46.4
6 Turkey	34.7	35.7
7 Germany	28.4	30.4
8 Great Britain	29.3	29.3
9 Russia	22.7	25.7
10 Malaysia	24.7	25

Source: data of UNWTO World Tourism Barometer

Importers of tourist services

In 2015 the expense on world tourism reached a record point of 959 M. US dollars, which is higher than a last year's indicator for 4%. Ten countries – leaders in expenses on the international tourism was headed by China from shares in 11% or 102 M. US dollars. It is followed by USA and Germany, which share is 10% and 9% respectively, at the same time Germany cut down the expenses in comparison with the last year for 2%.

These 10 countries occupy 55% of a share of the total amount of costs for tourist services in the world.

In recent years' tourists from Russia dynamically demonstrate the increase in expenses – 30% more than in 2014. France and Italy began to spend on the contrary less for tourism – for 16% and 9%.

Table 9 Countries-leader under expenses on tourism, M. US Dollars

Importers	2011	2013	2015	Gain	Share
All countries	865.2	856.4	959.4	4%	100%
1 China	36.2	54.9	102.0	41%	11%
2 USA	86.9	82.5	91.8	7%	10%
3 Germany	90.6	78.1	83.9	-2%	9%
4 Great Britain	68.5	50.0	52.7	3%	5%
5 Russia	23.8	26.7	42.8	30%	4%
6 France	40.9	39.0	37.2	-16%	4%
7 Canada	27.2	29.6	35.2	6%	2%
8 Japan	27.9	27.9	27.8	2%	3%
9 Australia	18.7	22.2	27.5	3%	3%
10 Italy	30.6	27.0	26.2	-9%	3%
other	413.9	418.5	432.3	-1%	45%

Source: data of TRADEMAP

3.1.4 State-private partnership as an instrument of state management of tourism sector

State-private partnership can be determined as a legal mechanism of coordination of interests and ensuring interaction of the state and business. At the same time, it needs should be considered as system of effective interaction between state bodies of different levels and business for the purpose of implementation of socially significant projects and programs of social and economic development of the territories, directed to improvement of quality of life and to goal achievement of state administration, as a set of forms of average and long-term interaction for the solution of socially significant tasks on mutually advantageous conditions ¹⁹.

From the economic point of view, the state-private partnership is interesting to authorities as the mechanism, by means of which implementation not only priority investment projects, but also development of infrastructure, and also enhancement of the social sphere of the region is possible. Now there is a number of objective prerequisites for forming of the effective forms of the state-private partnership allowing to attract private investments into national economy (the

¹⁹ Vlassova T.I. State-private partnership – as one of the main factors of dynamic development of tourist industry // Materials of international scientific-practical conference “Role of tourism in modernization of economics of Russian regions” Petrozavodsk, 2010 - p.49-52.

region, the city) to realize socially important projects, to provide efficiency of use of the property, which is in property of the state:

- reorientation of outbound tourism flows on internal in the conditions of crisis;
- creation of new special economic tourist and recreational zones and complexes, reconstruction of the existing recreational infrastructure meeting the requirements of the international standards;
- creation of scientific and personnel support system for development of the tourism industry;
- creation of system of the small and medium business providing all-round development of tourist sector;
- awareness of the need for development of tourism and recreation by legislative and executive bodies of all levels.

In tourist sector projects on the basis of state-private partnership of the following types, as a rule, are implemented: complex (creation of special economic zones of tourist and recreational type, state programs), target (in the separate directions or tasks of development of a tourist industry) and providing (indirectly influencing tourism – for example, on development of transport infrastructure). At the same time the main forms of state-private partnership in the sphere of economics and public administration, as a rule, are the following: state contracts, rent relations, financial leasing, state-private entities, production sharing agreements and concessionary agreements²⁰.

Depending on nature of the tasks solved within state-private partnership separate models of such partnership could be differentiated:

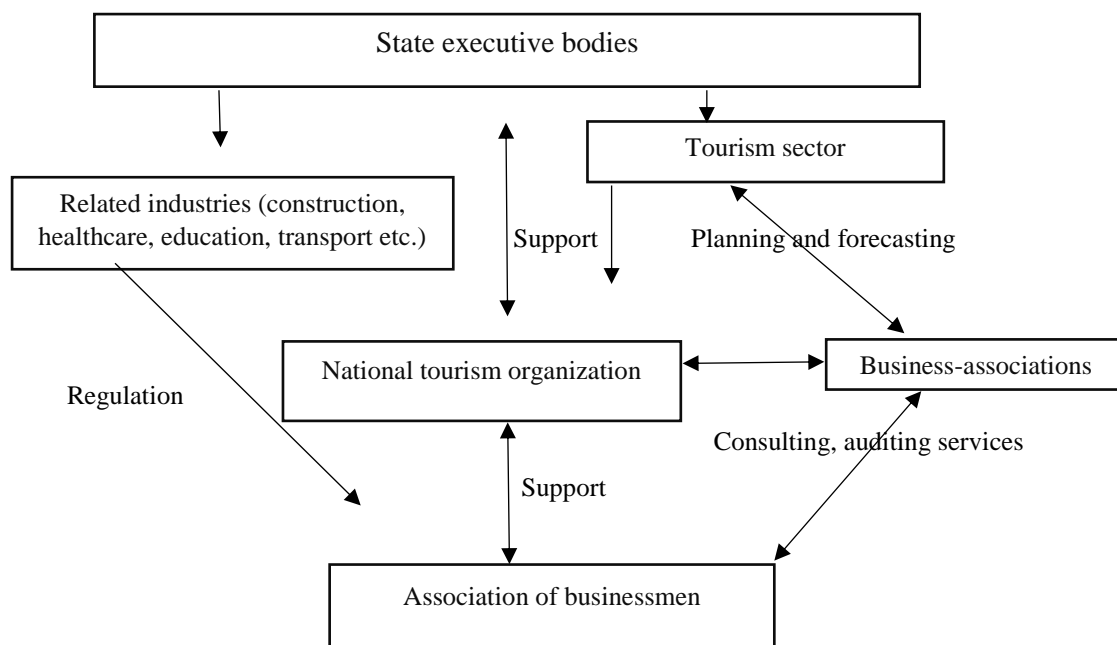
- organizational models (don't assume essential invasion into the property relations);
- financing models (commercial employment, rent, all types of leasing, the preliminary and integrated project financing);
- cooperation (a form of combination of the partner's efforts, who are responsible for separate stages of general process of creation of a new consumer cost).

In our opinion, in the conditions of Kazakhstan, would be possible the use of the organizational model, assuming a cooperation of the state and private partners, performed due to involvement of the third organizations, an assignment of separate functions and contract

²⁰ Baranova S.A. State-private partnership as a method of state regulation and support of business structures, involved in tourist industry. // Problems of modern economics – 2011. - №4 (40). – p.369 – 373.

commitments, for implementation of state-private partnership in the tourism industry at the regional level.

Figure 2 Model of state-private partnership interaction in tourist sector



Note – compiled on the bases of the resource²¹

In model of interaction of public-private partnership in tourist sector on the Figure 2 functions of bodies of the state executive authority on regulation of business activity in tourist sector are allocated: regulating, planning, forecasting, support.

Function of a regulation should include entering of single rules and regulations of business activity in tourist sector, standard legal support. Within implementation of this function the national tourism organization interacts with the executive bodies of the region regulating the adjacent fields of state and economic activity, including employment of the population, education, transport, housing and public utilities, consumer protection and wellbeing of the person.

Function of planning and forecasting includes determination of the main directions of development of tourist sector, the analysis of the main tendencies and modeling of opportunities of development. This function is performed under the direction of body of regional administration for regulation of tourism with the assistance of the national tourism organization and business associations providing consulting and auditor services.

²¹ Kudryavtseva Y. State-private partnership in tourist sphere as an instrument of national interest's protection // Vlast. – 2013. - №13. – p.91-94.

Function of support includes the measures taken by state authorities for the purpose of creation and providing legal, economic and organizational conditions of development of tourist sector. This function is implemented also through national tourism organization which, in turn, interacts with entrepreneurs through associations ²².

One of priorities in regulation of SPP in tourism is a creation of adequate normative and legal base. According to specialists of the United Nations, in this situation the emphasis has to be placed on flexibility of standard and legal regulation. Development of SPP requires reliable, predictable, stable, logical and focused on development of economies law frames; at the same time the normative and legal base shouldn't be very restrictive as such legislation doesn't improve process of creation and management of state-private partnership, but only constrains activity of potential investors. SPP in tourism is impossible without creation of an organizational legal mechanism of coordination of interests and ensuring interaction of the state and business within implementation of socially significant economic and social projects in the sphere of tourism²³.

The analysis of international experience of realization of state-private partnership shows that it has reached the greatest distribution in the countries with the developed market economy. There is a correlation between the level of social and economic development of the country and priority branches for application of projects of state-private partnership in them. So, for example, in the countries of G-7 more attention is given to the social sphere (health care, education, tourism infrastructure), and in developing countries – to transport infrastructure²⁴.

Thus, the state-private partnership is one of the main instruments of achievement of sustained economic growth of regions and the country in general. Interaction of the state and business in state-private partnership can become one of the perspective directions on an intensification of development of the industry of tourism and hospitality in modern conditions. One of priorities of regulation in SPP in tourism is creation of adequate normative and legal base. Potential of development for state-private partnership in the sphere of tourism is in the resources of the state, business and the population used at implementation of projects of partnership.

In modern conditions in the sphere of tourism we can observe the development of the state-private partnership, demonstrating various forms and models in the different countries. That is

²² Ignatyev A.A. State-private partnership in tourism // Integral. – 2011. - №2 (58). – p. 95-96.

²³ Baikov Y.V. State-private partnership as one of the main factors of dynamic development of tourist brunch // Messenger of national academy of tourism. 2009. № 2 (10). p. 17.

²⁴ Mamedov O. Economic potential of modern tourism. [Electronic recourse] // Managing of economic systems: electronic scientific magazine. – 2011. - № 33. – p. 9.

taking into account the activation of globalization processes, competition toughening, such partnership is necessary for promotion of a national tourist product on the international market, developments of the marketing plan, implementation of advertising activity, joint financing of tourist projects.

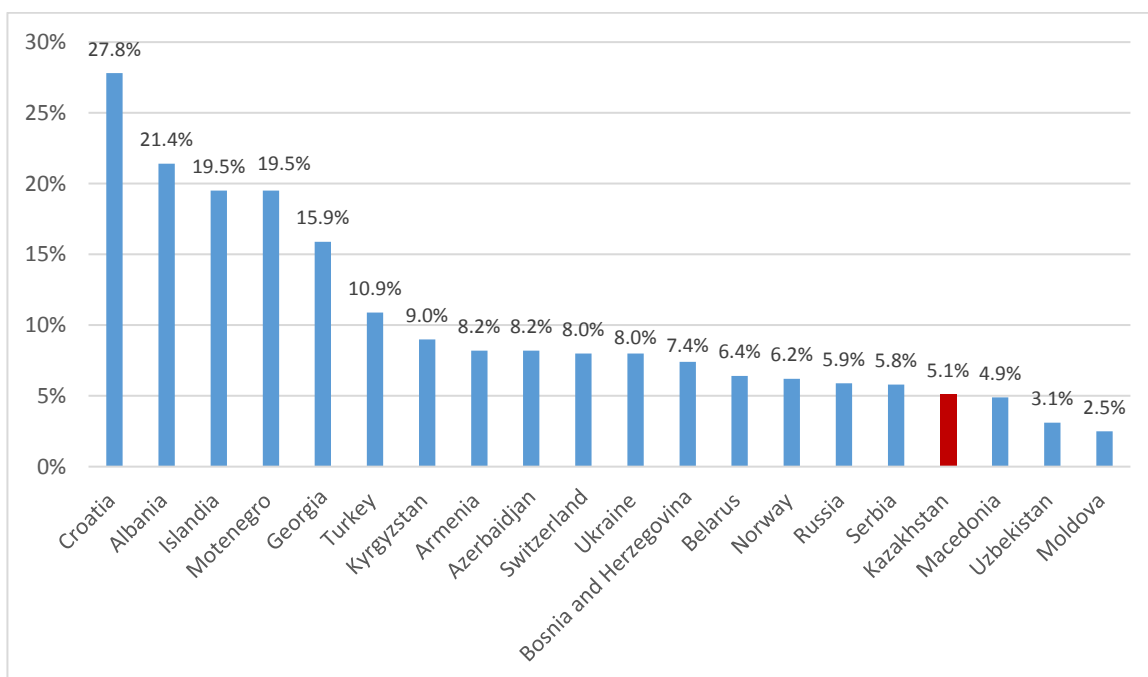
4 Practical part

4.1 Modern condition and problems of tourism development in the Republic of Kazakhstan

4.1.1 Analyses of development dynamics of the tourism market of RK over the last years

In spite of the fact, that Kazakhstan possesses an extensive territory, which includes potentially attractive tourist zones location, the tourist branch of the country is characterized by an insufficient level of development. Its share in gross domestic product is about 1.6%.

The general contribution of tourist industry to GDP of Kazakhstan following the results of 2015 has made 5,2%. Under this indicator Kazakhstan takes the 17th place from 20 countries of Europe (Figure 3).



Note: diagram was compiled on the basis of the source ²⁵

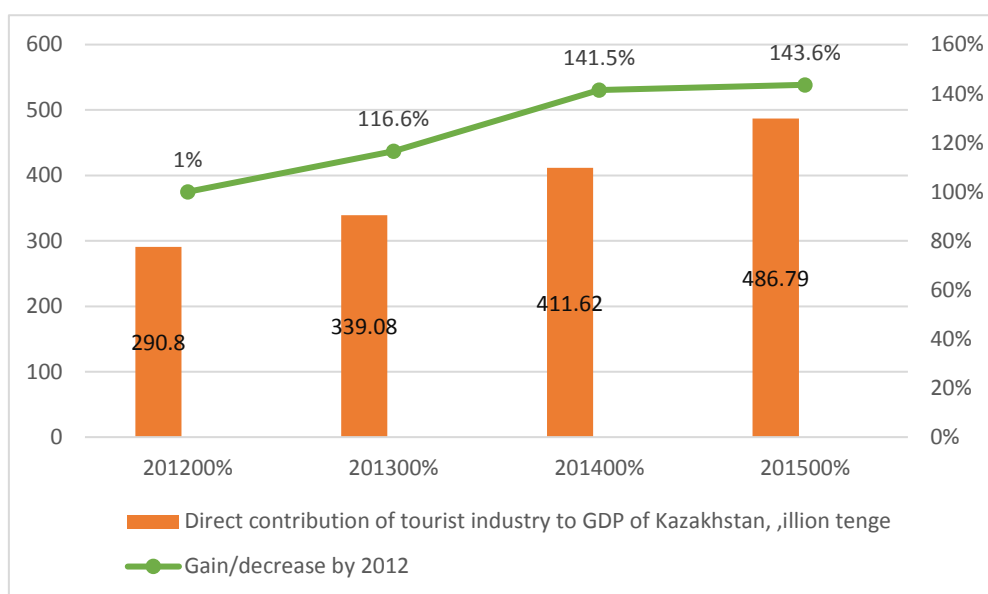
²⁵ Factors of Kazakhstan attractiveness. General review. National agency of export and investments "KAZNEX INVEST". Ministry of investments and development. 2016.

Figure 3 Total contribution of tourist industry to GDP in 2015

At the same time, positive dynamics of development of tourist branch of Kazakhstan should be noted.

The number of the employees, involved in this industry, accounts for circa 126,500 workers. It includes the number of personnel working in hotels, travel agencies, services of transport (except for suburban), restaurants and the leisure industry, i.e. directly involved in servicing the tourist industry.

Taking four years (2012 to 2015 inclusive) the volume of the income from tourism has increased by 43.6% and following the results of 2015, the direct contribution of tourist industry to GDP of Kazakhstan has made 486.79 billion tenge (Figure 4).

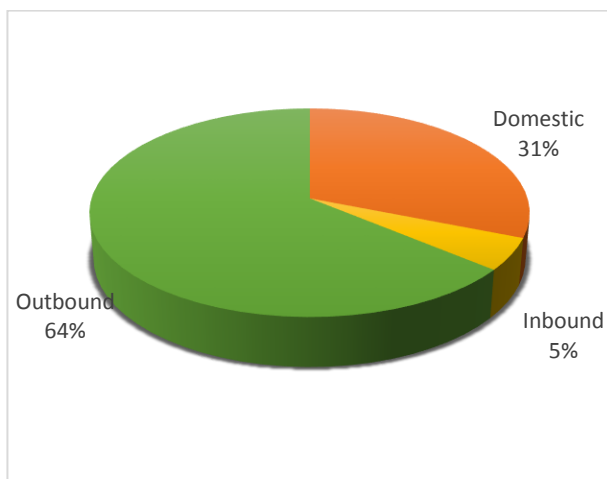


Note: diagram was compiled on the basis of the source²⁶

Figure 4 Income from tourist industry in Kazakhstan, billion Tenge

In 2015, 1994 tourist companies were registered in Kazakhstan; under form of ownership: only 3 of them are owned by the state, the rest are private. Tourist companies provided direct services to 641,302 persons.

²⁶ Export guide-book. National agency of export and investments "KAZNEX INVEST". Ministry of investments and development. 2016.



Note: this diagram was compiled on the basis of the source²⁷

Figure 5 Structure of tourist services, provided by tourist companies in 2015

As was mentioned above, 64% of the clients of the tourist companies traveled outside the borders of Kazakhstan, and at the same time more than 317 thousand people specified trips as holiday and rest purposes. It should be noted that the purposes of inbound tourism are: business trips and professional purposes.

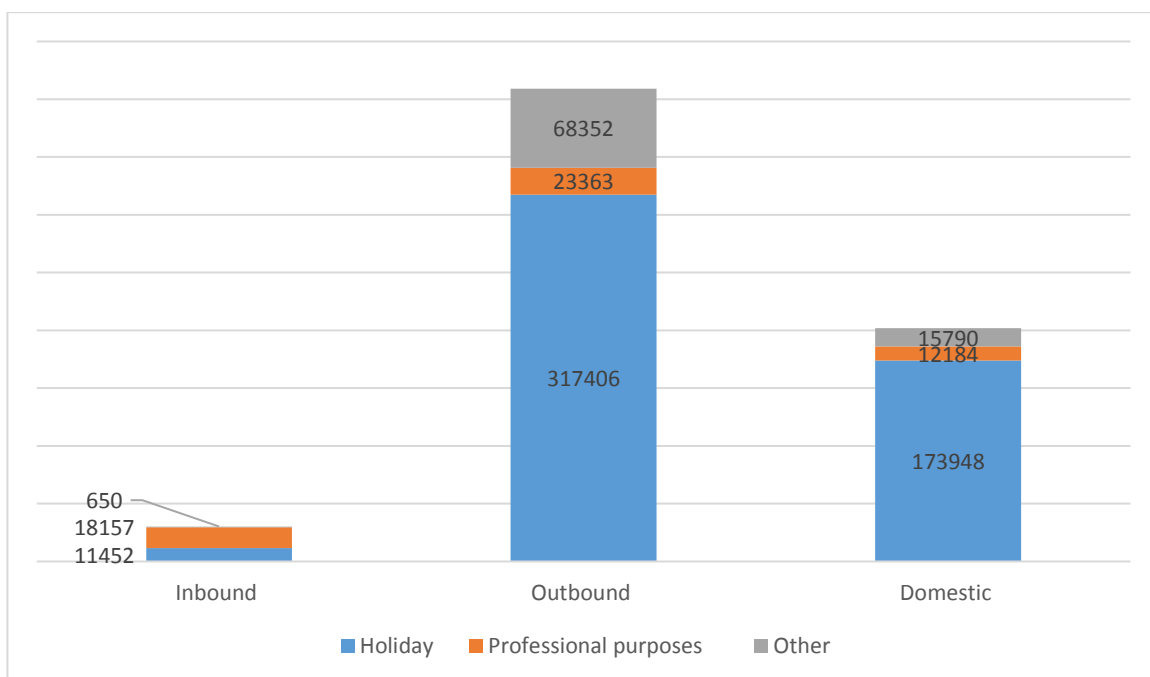


Figure 6 Distribution of the visitors under purposes of the travel in 2015, persons

Note: the data of the diagram were taken from the source²⁸

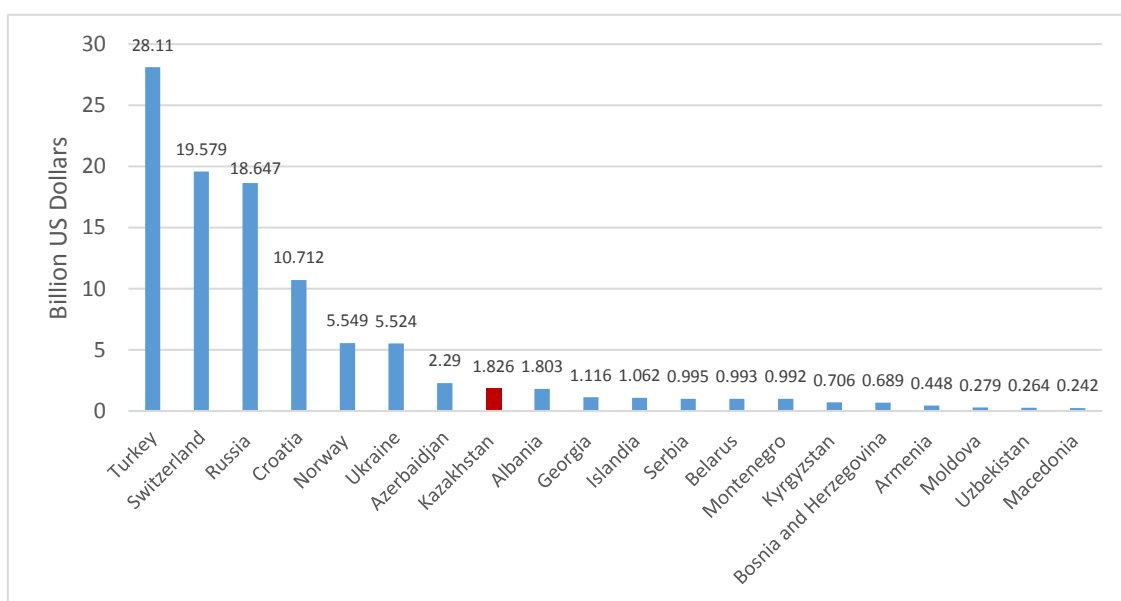
²⁷ Committee on Statistics of the Republic of Kazakhstan. Ministry of National Economy of RK. <http://stat.gov.kz>

²⁸ www.stat.gov.kz – Agency of the Republic of Kazakhstan on statistic

The analysis of inbound tourism flows in Kazakhstan shows that the republic remains insufficiently attractive to foreign tourists. On export of tourist services Kazakhstan takes the 78th place in the world and the 8th place among the countries of Europe except for the EU (Figure 6).

On availability, the price and level of service tourist services of Kazakhstan are insufficiently competitive in the world market and concede to foreign analogs. Loading of the hotel room supply is uneven. The highest coefficient of loading of the hotel rooms fund is in hotels of Atyrau (49,8%) and Mangystau areas (54,1%), the lowest – in North Kazakhstan (13,5%) and Almaty areas (13,1%)²⁹. The greatest number of the rooms, conforming to the international standards is concentrated in the important tourist centers – in the cities of Almaty and Astana, however even in these cities there is a deficiency of hotels of category 3 * and 4*.

The international hotel brands represented in Kazakhstan are limited in quantity and found only in four business-destinations: Astana, Almaty, Atyrau, Aktau. Price for the night in such hotels of 5 * several times exceed the price in similar numbers of branded hotels of Europe.



Note: diagram was compiled on the basis of the source ³⁰

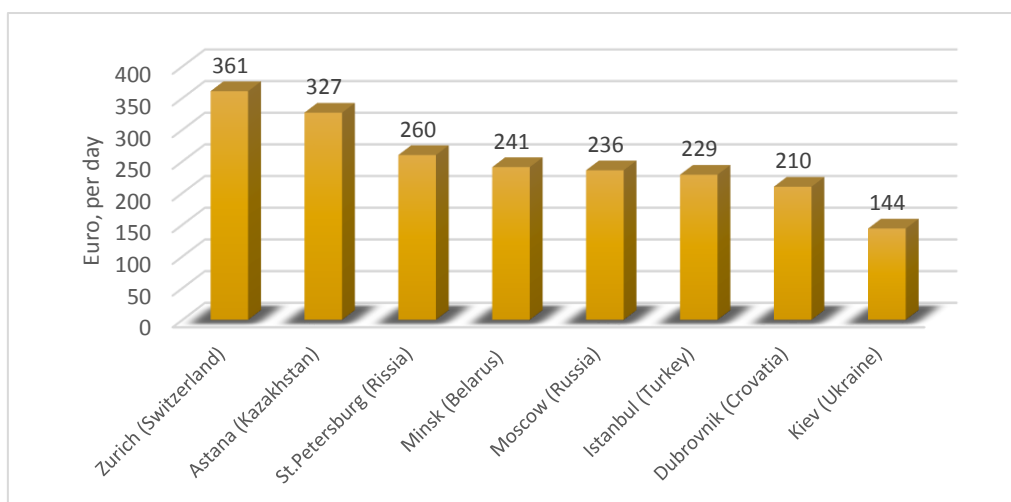
Figure 7 Rating of European countries except for EU countries, demonstrating an indicator of tourist services export in 2015

Figure 9 presents an average price for night in room of Double category in 5 * stars hotels of some European business-destinations. The high prices of stay are a consequence of the low

²⁹ www.stat.gov.kz – Agency of the Republic of Kazakhstan on statistic

³⁰ Export guide-book. National agency of export and investments “KAZNEX INVEST”. Ministry of investments and development. 2016.

occupancy rate of the rooms, which is insufficiently developed by the competitive circle and strong dependence on business tourists.



Note: diagram was compiled on the basis of the source³¹

Figure 8 Average price for night in room of Double category in 5 * stars hotels of some European business-destinations

In 2015 13% of all visitors used services of 5-stars hotels, 15% - 4-stars, 16% - 3-stars, other 56% used services of places without categories and lower than 3 stars.

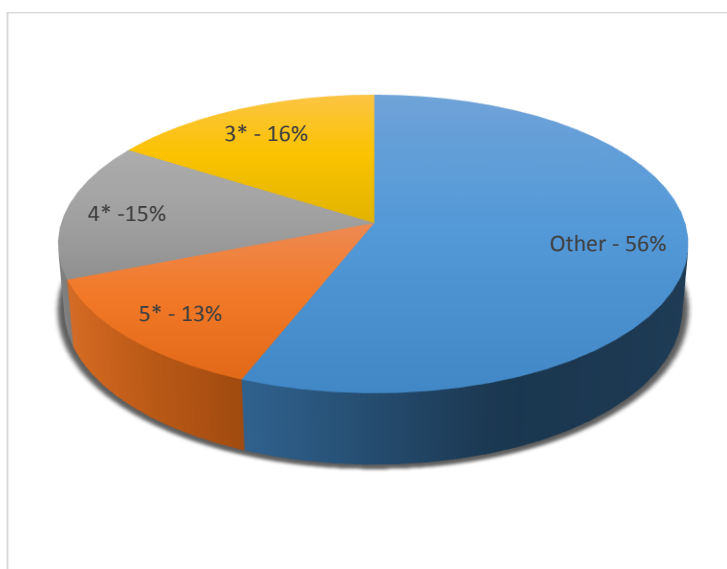


Figure 9 Categories of the places, occupied by the visitors

Note: diagram was compiled on the basis of the source³²

³¹ www.stat.gov.kz - Agency of the Republic of Kazakhstan on statistics

³² www.stat.gov.kz – Agency of the Republic of Kazakhstan on statistics

The current situation is a consequence of lack of real governmental support of tourist industry in Kazakhstan. The developed and accepted strategic plans didn't stimulate development of tourism in the country, at the same time any state program on development of tourist industry hasn't been finished prior to the planned date. Many of the accepted legal documents remained on paper, without having found practical application in the tourist sphere.

Main problems, slowing down the development of tourist branch in Kazakhstan are the following:

- dissociation of participants of the tourist market,
- insufficiently developed normative and legal base,
- inadequately high prices in hotels at rather low level of development of tourist infrastructure;
- the remaining fears of potential tourist safety;
- poor development in the tourist centers of infrastructure of leisure and entertainments;
- low level of information for potential tourists;
- Lack of uniform policy of tourist industry representatives and the republican authorities relating willingness to promote of a regional tourist's product;
- shortage of highly qualified personnel, both at the enterprises of the tourism industry, and in the regional system of public administration of tourist industry.

The share of tourists in the total amount of an inbound flow of foreign citizens on the territory of the Republic of Kazakhstan makes 1.49% while, for example, in Russia this indicator is at the level of 9.1%.³³ Over 2013-2015 the number of arrivals for the purpose of tourism has increased by only 36,16 thousand people, or for 64,9%, while outbound tourism flow has increased more, than twice: from 184,27 thousand people to 373,41 thousand people (table 10)³⁴.

Table 10 Analyses of tourist flows in Kazakhstan 2013-2015

Indicator	2013	2014	2015	Changes 2015/2013, +/-
Number of the trips of foreign citizens to Kazakhstan, thousand people	4097.39	5685.13	6163.2	2065.81
- including people from far-abroad countries, thousand people	455.08	490.09	620.76	165.68
Share for arrivals from far-abroad countries in the structure of inbound flow, %	11.11 %	8.62 %	10.07 %	-1.03 %
Number of arrivals with a purpose of tourism, thousand people	55.69	238.39	91.85	36.16

³³ Russia 2015: Statistical guide-book /Rosstat. – M., 2015.

³⁴ www.stat.gov.kz - Agency of the Republic of Kazakhstan on statistics

Share for tourism in inbound flow of foreign citizens	1.36%	4.19%	1.49%	0.13%
Number of trips, made by Kazakhstan citizens abroad, thousand people	6019.17	8020.4	9065.58	3046.41
Number of departures with the purpose of tourism, thousand people	184,27	289.81	373.41	189.14
Share of tourism in outbound flow of the KZ citizens, %	3.06%	3.61%	4.12%	1.06%
Correlation between inbound and outbound tourism, coefficient	3.31	1.22	4.07	0.76

Note: the table was compiled on the basis of the source³⁵

The advancing growth rate of outbound tourism in comparison with inbound tourism assists accumulation of negative tourist balance in the balance of payments of RK. So, negative tourist balance for 2013-2015 has increased from 287.8 million US dollars to 435 million US dollars.

Finally, Kazakhstan was and remains "the payment donor" for such countries as Turkey, China, the United Arab Emirates, the Kingdom of Thailand.

It is quite obviously that now Kazakhstan has an incomplete complete system of tourism. The separate branches, which almost aren't connected among themselves are in developing process independently, each of them has its own shortcomings, defects and at the same time positive sides. According to experts, Kazakhstan is insufficiently attractive to foreign tourists, lags behind formation of the corresponding services industry, has no necessary level of competitiveness, cannot compete with foreign companies by any types of tourist services.³⁶

4.1.2 Analyses of tourism infrastructure of RK

Tourist infrastructure represents a multi-faceted offering of social, recreational, educational and leisure pursuits, intended for a fully functioning tourism industry.

Being a part of an infrastructure, inter-related tourism must perform a number of important functions, including, integration and regulating functions.³⁷

Tourist infrastructure exerts direct and indirect impact on economy of the country. Direct influence is an attraction of financial resources from services to the tourist companies, financial

³⁵ www.stat.gov.kz - Agency of the Republic of Kazakhstan on statistics

³⁶ Ashimbayeva A.T. Potential for tourism development in Kazakhstan //Kazakhstan truth № 68 (27689) from 09 April, 2014

³⁷ Seetanah B. Does Infrastructure Matter In Tourism Development? UNIVERSITY OF MAURITIUS RESEARCH JOURNAL – Volume 17 – 2011. University of Mauritius, Réduit, Mauritius.

remuneration of employees of tourism sector and creation of new working places, growth of tax revenues. Indirect influence consists in multiplicative effect of inter-industry interaction. The size of this effect depends upon the size of income, spent within the region³⁸.

Let's consider a current state of very important infrastructure element – accommodation units in the Republic of Kazakhstan. There are about 600 hotels, from them 107 are of 3-, 4- and five-stars hotels, other hotels belong to other categories. The analysis shows that hotels of a tourist class (2-3-star or small and average hotels) have the greatest profitability though they, as we see at figure 1, aren't enough available. However, the material resources of accommodation units, including hotels, boarding houses, houses and recreation facilities, and also sanatorium institutions, are characterized by high degree of moral and physical wear which makes 80 percent, a part of hotels is in a depressive state and on the verge of bankruptcy as have been constructed in the sixties.³⁹

The most attractive accommodation units for tourists are in Almaty hotels (50,7%), Atyrau region (13,7%), Astana (8,1%), Kostanay region (6,9%) and West-Kazakhstan region (5,4%). Almaty is considered to be the southern capital of Kazakhstan. Almaty is one of the largest business and cultural centers of Central Asia.

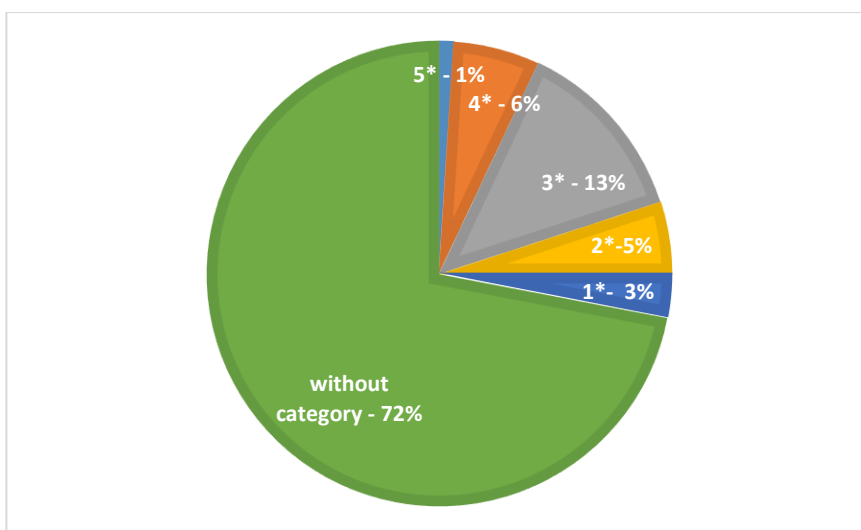


Figure 10 Distribution of the accommodation objects under categories

Tourism development is highly influenced by transport infrastructure. Transport is a major link between separate elements of a tourist industry and implemented and managed properly, can

³⁸ Romao, J., Guerreiro, , Rodrigues, P. Regional tourism development: culture, nature, life cycle and attractiveness // Current Issues in Tourism. – 2013. – Vol. 16 (6). –pp. 517-534.

³⁹ Problems of tourism development in the Republic of Kazakhstan at the current stage. – Internet recourse. <http://works.doklad.ru/view/A1ZtFWzWtUc/all.html> 12

promote a much faster tourism development. Tourists arrive to Kazakhstan generally by air transport, using modern airliners and technologies of service.

Table 11 Transport infrastructure of the tourism

Elements of infrastructure	
Airports	22
including: international airports, authorized for international flights	14
Railway stations	32
Bus stations	72
Sea ports	1
River stations	2

At the same time most of tourists prefers, in respect of service and reliability, service of foreign carriers, that involves decrease in a passenger traffic on the flights made by domestic carriers. Many objects of interest in Kazakhstan are surrounded by minor road and republican highways and the majority leave much to be desired. Besides, the bus fleet of East Kazakhstan is in a poor state, has practically no modern comfortable buses that doesn't offer a high level of service of tourists.

If we consider air transport, then it is possible to say, that it is the only component of tourist industry infrastructure in the country that is up to standard. Today, the international airlines of the republic allow travelers to make flights to Germany, India, the UAE, Turkey, Italy, the Republic of Korea, Hungary, Israel, China and Thailand. The main air carrier is “Air-Astana”. Foreign tourists most often use services of air transport - it is 94,7% of all number of foreign tourists; 3,3% of tourists prefer to use railway transport; about 0,4% of tourists travel by bus and other 1,6% use other overland means for travelling⁴⁰.

Also it is necessary to consider another important infrastructure component – the area of public catering. For now, skilled workers in this sphere are only cooks, and any can become the waiter or the bartender, it isn't obligatory to have special training in educational institutions. So - it is possible to draw a conclusion about the level of service in the sphere of public catering.

However, Kazakhstan restaurant market is growing and developing. Relatively recently in the Kazakhstan market the international networks of a fast food, such as Burger King, KFC, Hardees have begun to appear, at the same time they began to force out the local companies. In restaurant business approach to work has changed also: if earlier in Almaty only local cooks

⁴⁰ Pilyavski V.P., Takhtayeva R.Sh. Touristic industry of East Kazakhstan: possibilities and problems of development // Messenger of National Academy of tourism. – 2013, № 2 (26). – p. 49–52.

worked, now, for example, in "Cafeteria" is the chef from France, in "Keg" now – from Germany, in "Del Papa" – the Italian, and in the Georgian restaurant the whole team of cooks from Tbilisi is invited.

Thus, though real prerequisites of development of tourism in Kazakhstan exist, the process is slowed down by insufficient tourism infrastructure in the republic. The effective solution of infrastructure problems will allow to realize provisions of the concept of development of tourism in Kazakhstan, accordingly up until 2020, the contribution of the tourism industry to GDP of the country will grow from 2.4 to 7 billion US dollars, and employment in tourism – to 270 thousand people.

Adoption of the State program of development of tourism for 2010-2014 became an important step in development of tourism industry. Thus, the state has provided the solution of the main unit of system-wide problems of tourist industry.

Today we can already speak about some results of the first stage of implementation of this program. The program covers the main problems of ensuring sustainable development of Tourism, provides measures for development of tourism infrastructure: providing measures for development of small and average business in the serving sphere of providing tourist services, creation of conditions for financing and crediting of subjects of tourist branch for development of infrastructure of the industry of tourism and others.

Also, an important role is given to creation of prerequisites for formation of middle class, support of small and medium business, in particular - large tourist centers, which are technologically equipped with the modern equipment and objects of cultural, children's rest, sports and entertaining constructions in the city of Kapchagai, Shchuchinsk-Borovskoy to a sanatorium zone near Lakes Alakol and Balkhash.

Within implementation of this program the importance is given to priority implementation of breakthrough projects on development of the following objects:

- Almaty city and Almaty region (creation of conditions for development of tourism infrastructure: construction of the industry of tourism and entertainments in the city of Kapshagai, creation of tourism infrastructure and conditions for its further development at “International Center of Border Cooperation “Horgos” JSC for formation of the sphere of the accompanying services);

- Astana city and the Akmola region (creation of conditions for development of the sphere of the accompanying services, including show business in the Shchuchinsk-Borovskoy resort area,

infrastructures of ecological tourism in the National Burabay natural park, construction of the ethnographic complex "Sheber Auly" with the exhibition center "Palace of Masters");

- tourism under the Silk way (development of cultural and informative tourism in the Silk way of the Southern Kazakhstan area, the tourist center of Turkestan and Otyrarsky district);

- beach and cruise tourism on the Caspian Sea (development of the project and creation of conditions for preparation and the organization of the international cruise for the Caspian Sea with visiting of the ports of Russia, Dagestan, Azerbaijan, Iran, Turkmenistan, arrangement of a recreation area on the island Kenderli for development of beach tourism);

- creation of conditions for development of informative tourism at Baikonur Cosmodrome within the project "Kazakhstan — the First Space Harbor of the Planet".⁴¹

For the purpose of complex development of modern tourism infrastructure and attraction of investments into construction, ensuring growth of innovative activity in the territory of the Shchuchinsk-Borovskoi resort area the special economic zone "Burabay" was created.

Also an implementation of the Aktau city project in Mangystau Region has started. The project is directed to support and development of business tourism. The experience of construction, which is carried out in the United Arab Emirates and examples of town planning of the developed European countries is taken as a basis of this project. The companies "Millennium Development", "Kazemir Development of Almaty", "Kazemir Aktau", "Hatib and Alami", which have developed and submitted projects of development of infrastructure engineering communications and the master plan of creation of the international tourist center "Aktau city" are attracted to its embodiment.

Within implementation of the program, the complex of events for revival of the Kazakhstan section of the Great silk way, first of all in the Southern Kazakhstan area as historic, spiritual and cultural center, in particular creation of objects of the tourist industry in the city of Turkestan and Otyrarsk area is held.

For development of internal tourism in the international standards, construction of the Eurasian center of innovative technologies, cultural and sports leisure on Lake Balkhash construction of the tourist Balkhash-Nursaya complex is planned. The project is carried out by the

⁴¹ Tuzova N. G. Tourist passport, as a form of promotion of tourist services of municipal bodies // Modern scientific technologies. – 2014. – № 7-2. – p. 156-160.

ALAMO GROUP company together with Association of the Kazakhstan-Japanese business and humanitarian cooperation "Progress"⁴².

4.1.3 Characteristic of main touristic places of Kazakhstan

Kaindy Lake

The lake is located in Almaty region at the height of 1900 meters above sea level, is famous for its fir-trees tops, which are sticking out of the water. The name “Kaindy” has been given thanks to birch woods. From Kazakh “Kaindy” is translated as "abounding with birches".

The lake with surprisingly turquoise waters has been formed in 1911 after a powerful earthquake, resulting with mountain collapse, which has blocked the river, and water filled the valley.

At Kaindy one can go swimming and scuba diving with plenty of opportunity for filming under water. Water temperature in the lake makes +6 degrees, and its depth is 25 meters and the lake length is 400 meters. Visitors of Kaindy should pay an ecological fee.

Mausoleum of Hodge Ahmet Yassau.

The Mausoleum is located in the south of the country, in the city of Turkestan. It was built in the 14th century in honor of the Old Turkic poet - Ahmet Yassau, living in the east during the 12th century. The construction represents a complex of palaces and temples, and besides the mausoleum, there are also medieval bath at Khilvet where a great Saint lived, and the underground house for Kumshik-ata's reflections, which by miracle has remained up to now.

Mausoleum of Hodge Ahmet Yassau could be called as a masterpiece of medieval architecture; the mind is blown by elegance of a decor, the pattern arches of ceilings and colored mosaic.

Charynsky canyon

Charynsky canyon is one of the most ancient and most beautiful places in Kazakhstan. Stones, which form the canyon, are over 12 million years old! And the striking rock formations of bright red sandstone have been shaped under the influence of wind and water, they delight the eye with the fantastic beauty and magnificence.

⁴² Tulegenova Kh. Road map for tourism development in corridors of Silk way [Electronic recourse]. – 2013. – URL: <http://ortcom.kz/ru/news/dorojnaya-karta-razvitiya-turizma-v-koridorah-shelkovoputi.2244>

In the same place one of the rarest breeds of trees – a relic Sughd ash-tree grows. 25 million years ago this tree has been widespread on the planet. Now ashen groves can be met only in the Charynsky canyon and in North America.

It is better to look at a canyon at first from above, and then – having gone down to the bed of the river. There rocks form the surprising compositions named "The valley of castles" and "Witches' gorge".

Katon-Kargay

Katon-Kargay is the unique place in Kazakhstan, there is a national park and reserve here. The nature is very beautiful – the woods adjoin sub-alpine meadows, lakes and the rivers, mountains. The reserve includes various fauna: elks, bears, marals, ermine, sable and many other rare species of fauna are also to be found.

In Katon-Karagay one can observe the water-falls Kokako and the hot natural waters springs of Rakhmanovsky springs. Many people arrive here from all the country to undergo medical and recovering procedures, which use unique natural products.

Baikonur

Here is located the already well known 'Spaceport' practically all sights are connected with astronautics. The places, most popular with tourists, is the museum of history of the spaceport, the International Space School, the Gagarin's Arbor, the avenue of astronauts and "Cosmonaut" hotel, where astronauts stay before flights into space. Only in this city it is possible to see the launch of a real rocket. Practically on each street of Baikonur there is a monument – in honor of scientists, astronauts, writers and poets.

Beket-ata mosque

Beket-ata mosque is the holy site for the Kazakhstan Muslims, it stands practically in the same row with the burial place of Hodge Ahmet Yassau. All year round, believers and pilgrims follow a never-ending stream here with up to one thousand people a day visiting the site.

This mosque is unique for its location underground. To go down inside, it is necessary to pass about one and a half kilometers. On the road the one can visit wells and sample the salty and bitter water, and each pilgrim will usually collect a water bottle here.

Borovoye

Borovoye is considered to be the most well-known resort of Kazakhstan, Borovoye is famous for the nature, tens of health resorts and clean air. It is an excellent resort to take rest at the

lake during the summer months, and in the winter the visitors can enjoy a multitude of winter sports activities.

A prominent feature of the area is a rock called Zhumbaktas – the rock-riddle, which on the one hand, reminds one of the Egyptian sphinx, another – an old woman, and with the third – a beautiful girl.

Merke Sanctuary

The Merke sanctuary is located at the height of three thousand meters above sea level near the settlement of Merke in the Zhambyl region. There are about seventy monuments (barrows and stone sculptures), that have stood the test of time and have remained up to now. Monuments display various periods of history of Semirechye.

The Merkenski and Zhaysanski sanctuaries, which are located near, are called "The earth of healing". People come here to get rid of illnesses, to ask for the child, or to touch sacred land.

Merke includes radonic sources with healing water – the health resort, known for radonic bathtubs, are located here.

Map of Kazakhstan – “Atameken”

Here it is possible to observe the whole country, as if being in one’s palm. Atameken is a unique museum under the open sky, where city sights and historical monuments of the country are presented.

The map, with an area of 1.7 hectares, contains 14 areas of Kazakhstan and two cities – Astana and Almaty. Among the sights you can find: mausoleum of Hodge Ahmet Yassau, Karagiye hollow, the residence of the president, Bukhtarminsky hydroelectric power station. The map of Kazakhstan is in the capital of the state - Astana and continuously is replenished with new features.

Ethno –village

Bringing history to life you are transported back in time to experience the life of ancestors to visit the houses and experience the conditions, where over past times there have lived ancestors of numerous nationalities of Kazakhstan. What was once only available in textbooks journals of history can be observed personally – all in the ethno-village in Ust-Kamenogorsk On the left coast, near the eco-park, the special platform with the only street, on which settlements of 11 nationalities, besides Russian and Kazakh are located. Kazakhstan is a multinational country and here there is an opportunity to visit all of them, to learn traditions and customs of the different people. In the village all details are reconstructed with an accuracy: authentic building materials of houses, household items and clothes. Some exhibits are more than hundred years old.

Bayterek

Bayterek Monument is a young architectural monument, it is only 12 years old. It has been constructed in 2002 at the initiative of the President as a symbol of transfer of the capital from Almaty to Astana. At the height of 97 meters there is a print of a hand of the President Nazarbayev, and the monument is surrounded by large park zones. Different public events are often held there.

The form of Bayterek represents the Life Tree (from Kazakh "Bayterek" is translated as "poplar" and "support"), with its roots going to the earth, and the top - propping-up the sky. According to the legends of ancient nomads, on a joint of the two worlds there is a river, on the bank of which the tree grows. On a legend, every year in a tree crown a sacred bird Samruk lays eggs – (the Sun). The structure of Bayterek corresponds to these legends and symbolizes the state, which kept its roots.

Zharkent mosque

The mosque in the city of Zharkent, that is on the border with China, built in the 19th century, is famous for being very much alike with its appearance to a pagoda: sloping roof, and its edges are lifted. It is also interesting, as it is constructed without any nail or iron bracket, and as material for construction the wood of a Tien Shan fir-tree was used. Walls and arches are painted and covered with a carving.

In different years the building was used under warehouses and the granary, people lived there, over time it fell into decay. After a strong earthquake in 1910 the mosque has been considerably destroyed, but restored after 70 years.

4.2 Perspectives for development of the tourism sector in RK

4.2.1 Improvement of staff training

The market of tourism in Kazakhstan is developing very quickly. But, making it up to date, competent specialists are necessary. The main criteria of the effective organization of professional training of specialists of the sphere of tourism are presented in table 11.

Table 12 Criteria of the effective organization of staff training for tourism sector

Criteria of the effective organization for professional training of the staff, engaged in tourism sector	Main parameters
Attractiveness of the training content with due regard to specialization	Academic progress, frequency of the choice of course papers in the field of a natural recreation, attendance, interest in additional literature
Efficiency of methods and forms of education on formation of professionally significant qualities of the personality	Motivation in choice of specialization, demonstration of behavioral aspects in the extreme environment, the independent management of tours, quality of knowledge
Adaptation in real professional activity	Independent development of tourist business in a natural recreation, career, executive activity in tourism organizations

Training of specialists for tourism in the different countries is conducted differently and reflects influence of concrete historical, political, social - economic and other factors. For current situation of tourism development in Kazakhstan it is expedient to apply the staff scheme, including two systems of training:

- specialized professional training for the enterprises, which are directly taking part in production of a tourist product;
- training of specialists of mass professions for allied industries of national economy⁴³.

At the same time each of these systems has their educational levels.

1. The highest (institutional and administrative) level. It assumes training of managers, who define the directions and tasks of work, strategy, tactics of branch of a separate enterprise (manager of tourism, manager of hotel, manager of marketing activity in tourism, etc.). Specialized training of personnel of such level is carried out in the leading educational institutions (universities, schools of tourism, institutions of professional development) according to programs of the Master and Bachelor degree.

2. Medium level (administrative and technological). Administrative and technological activity is characteristic of personnel, which provide the technological sequence of service, coordinates interaction with other technological links (travel agent, booking manager, headwaiter of the restaurant). This level is provided by the highest and average special educational institutions,

⁴³ Sakun L.V. Theory and practice for specialists training of tourist sphere in developed countries of the world. – Kiev: МАУП, 2004.

colleges, which train specialists in management of certain technological processes of Bachelor level.

3. Initial or lowest level (technological - executive). It is presented by personnel, which perform concrete tasks and provide satisfaction of separate needs of the tourist or realization of a separate type of service. This level is provided by educational institutions (centers, schools, courses) of a wide profile and specialization, which train workers of mass professions: waiters, cooks, instructors, etc.⁴⁴

This scheme allows to carry out multiple specialists training of tourist branch in the conditions of dynamic changes in the market of tourist services. Also it emphasizes distinctive feature of a modern educational situation, which sign is – a transition from the state formation of content of education to the combination of efforts of interested parties in the solution of multiple-factor problems of education providing to teachers, students, employers a possibility of the choice of contents, forms and methods of the organization of educational process and type of educational institution. In these conditions the content of professional tourist education is provided with its corporate character, when already at a stage of training the future corporate affairs are put (technological standards of hotel and tourist facilities; franchise relations; norms of licensing and certification and so forth).

For the solution of this task the joint efforts of all interested parties are necessary:

- state managing authorities;
- higher education institutions, which are engaged in training for the tourist industry;
- enterprises working in tourism;
- experts in psychology and pedagogics;
- staff of the research institutes studying professional formation of the personality.

The staff reserve has to maintain rates of development of tourism in the country. Therefore, for the forced development of training quality in tourist branch of Kazakhstan it is necessary to introduce the principles of continuous education in training process. Continuous education in the sphere of tourist staff training includes several educational levels (table 12).

Table 13 Process of Continuous Education

Educational level	Characteristic
First level	Is implemented already at secondary school on the base of 8 - 11 forms, where pupils in parallel with general education disciplines, seize bases of specialty of social animation, sports and excursion tourism, which

⁴⁴ Kobayak M. Actual issues of formation and development of staff potential for hospitality industry. Messenger of association for tourism and service. 2011/1

	are taught as a complex of disciplines of primary tourist education. Graduates obtain primary special knowledge of tourism.
Second level	Acquisition of professional qualifications is carried out in colleges, which are more and more attractive for the graduates of schools for the purpose of continuation of the professional education and mastering a profession on a social tourist profile. Actually it is a system of secondary professional education with receiving degree and qualification of the Bachelor on tourism.
Third level	The higher education of various educational and qualification levels, in which system certified and interactive training gets more and more wide scope, which expands professional mobility of the specialist. According to programs of the higher school levels of professional education, and also level of tourist qualification - Bachelor with secondary professional education are implemented.
Fourth level	Post-graduate training is the fourth level of professional education, where big values are gained by system of additional education, professional development, acquisition of the second specialty, domestic and foreign on-the-job practice and employment, in particular, abroad.

The principles of multilevel and continuous education concretize programs of stationary and post-graduate training: school - lyceum - college - higher education institution - retraining, professional development, acquisition of the second specialty, domestic and foreign on-the-job practice and employment, in particular, abroad.

Formation and further development of tourist system of continuous training naturally demand combination of efforts and coordination, and in some cases - direct cooperation of the existing organizations, training centers, higher educational institutions, institutes of professional development as main educational and methodical centers, network of courses on preparation and retraining of managers and executors, schools, seminars, educational groups.⁴⁵

The current state of development of training system for the sphere of tourism in Kazakhstan doesn't allow to provide fully in the future the branch with necessary workers of the corresponding qualification. It is necessary at the present stage of tourism development, when it develops in quick rates, to pay special attention to training of highly qualified personnel.

Quick rates of development of world economy and the requirement of increase in efficiency of educational and methodical base of tourist education put forward also a problem of ensuring the advancing rates and deepening of maintenance of qualification structure of personnel potential. It

⁴⁵ Nedkova A. Modern requirements for training and qualification of tourist staff. Messenger of association for tourism and service. 2011/1

demands from the systems of training and professional development the implementation of such functions:

- definition of discrepancy between the actual qualification of the staff and qualification requirements of effective and high-quality implementation of activity in each workplace, stimulation of each performer to search of ways of elimination of this discrepancy;
- selection of staff for professional development in those forms of education, which provide professional suitability and prospects;
- ensuring economic interest of the organizations in timely training and retraining of personnel;
- creation of necessary organizational conditions for effective coherence of actions of all parties, which take part in professional development process.⁴⁶

At the present stage of tourism development in Kazakhstan there is a need for development of model of the universal specialist for the sphere of tourism.

In a situation, when tourism more and more takes the market forms of functioning, labor market demands professionals, having specific technologies and software products, knowing bases of advance of tourist services, communicative and psychological features of communication with clients etc. The analysis of experience of modern innovative trainers shows, that the most effective direction of improvement of quality of any educational process - is a creation of such psychology and pedagogical conditions, in which the student will be able to take an active personal position and reveal himself to a full extend not only as object of education, but also as the subject capable for creative self-improvement. In tourist training formation of professional skills is especially important during passing the practical training, which reveal abilities of students to ordering of information, obtained during the theoretical course. Besides checking of student ability to professionalism development, the value of the practical training is also in their promotion to development of communicative skills, formation of the positive attitude to work. Traditionally educational process is carried out by means of holding classroom activities (lecture, practical and seminar training), and also independent work of students.

For activation of cognitive activity of students, it is necessary to use the excursion method, assuming training out of educational audiences. In practice of training various methods are used: inductive, deductive, analytical, synthetic, methods of abstraction, analogy, modeling, generalization, experiment, etc. All these methods are to some extent used when holding an excursion.

⁴⁶ Trukhanovich L.V., Shchur D.L. Personnel of tourist industry. – M.: Fin Press, 2008.

Now the specialists for tourism in Kazakhstan are prepared by about 80 highest and average educational institutions. In system of higher professional education, the main training for the tourist industry is implemented within the integrated group “Services industry” under two specialties "Social and cultural service and tourism" and "Tourism" including more than 10 specializations.

In the Republic of Kazakhstan, the profile higher educational institution, which is engaged in training for tourism - is the Kazakh academy of tourism and sport. At the same time training of specialists with higher education for the sphere of tourism is implemented in other non-core higher educational institutions within specializations in the directions of preparation in the adjacent fields of professional activity. In all regional state universities there is a specialty "Tourism". In system of secondary professional education training for the sphere of tourism is formed on the basis of general educational programs for the following kinds of activity: hotel service, public catering, service on transport, tourism. At the same time the gap between demands of the branch and the offer from educational institutions remains very essential. Especially it concerns average special educational institutions, which educational base leaves much to be desired and doesn't conform to requirements of modern realities of the Kazakhstan tourism at the present stage of development.

4.2.2 Modernization of state management mechanism in tourism sector of economic

State management in development of tourist sector of economy represents impact of the state on activity of the managing branches, as well as market infrastructure for the purpose of providing normal conditions of action of a market mechanism, realization of the state social and economic priorities and development of the uniform concept for tourist sectors development. This process includes development of state policy of development of tourist sector, justification of its purpose, tasks, main directions, the choice of tools and methods of its implementation (Figure 11).⁴⁷

⁴⁷ Voronin A.N., Sukhenko K.E. Theoretical and methodological aspects of improvement of tourism state regulation in regions. // Problems of modern economy. – 2007. - №3 (23).

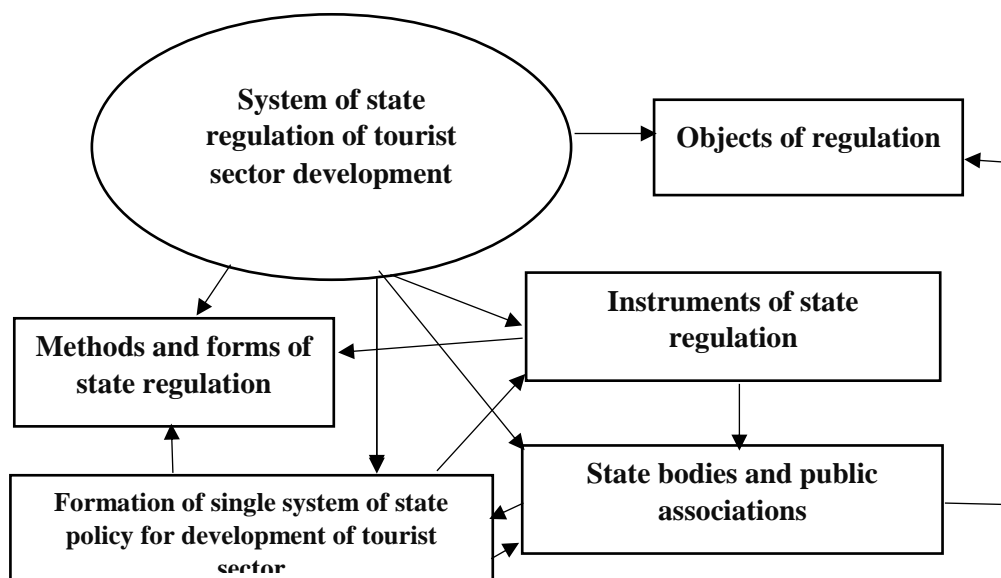


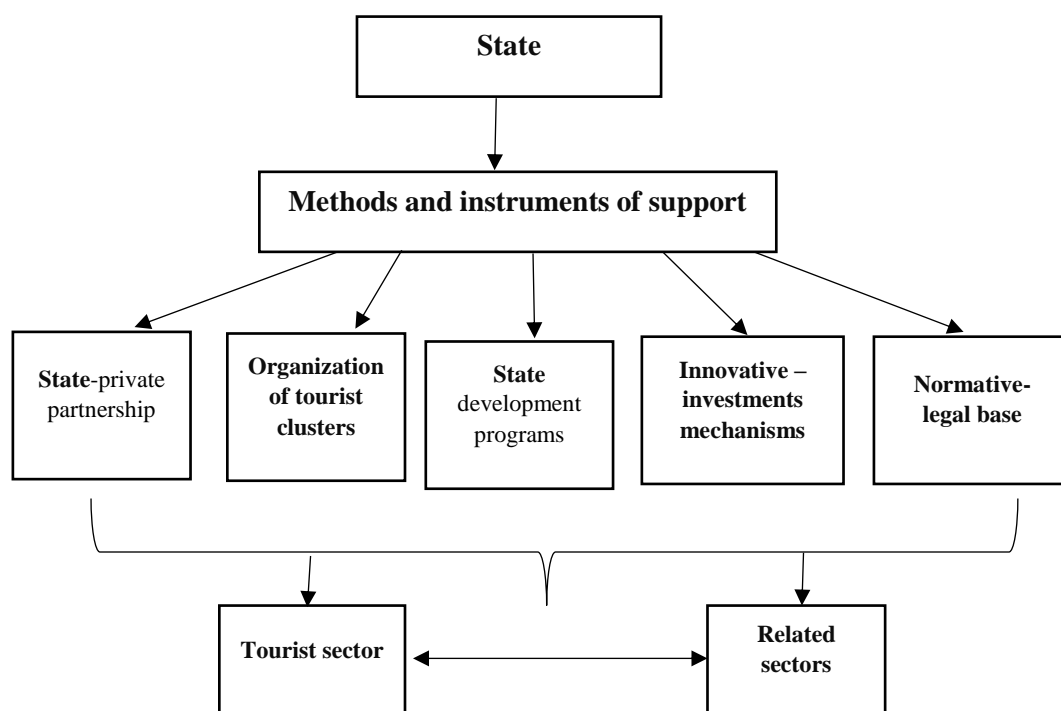
Figure 11 System of state regulation of tourist sector development

Note - the scheme was compiled on the basis of the source 48

Figure 11 presents the difficult system of state regulation for tourist sector development and interrelation of its elements. In system of state regulation of tourist sector development public authorities form national tourist policy and at the same time they are the executors of it. When developing tourist policy, instruments, methods and forms of impact on subjects to regulation are defined

It is possible to state with a confidence, that development of tourist sector completely depends on a role and participation of the state in this sector i.e. at which extent tourist sector enjoys the state support. The following model of the state support of tourist sector is suggested (Figure 11).

⁴⁸ Frolova T.A. Economics and management in the sphere of social-cultural service and tourism. - Taganrog: TTI FSU, 2011. – 356p.



Note – The scheme was compiled on the basis of the source⁴⁹

Figure 12 Model of state support for tourist sector

Now further development of tourism in RK demands development of the main tools of the state tourist policy of RK, improvement of investment, financial, organizational mechanisms.

Investment mechanisms include formation and development of tourist complexes, clusters and centers; projects on construction of facilities of tourist display, tourist infrastructure, etc.

For increase in the importance and priority of tourism in national economy it is necessary at the level of the cities and areas of regional submission to create the separate structural divisions having the coordinating functions of influence on the territorial organizations and business partnership with new key competences. Optimization of functions of the existing regulators of branch or creation of the new organizational structures aimed at innovative transformations can be options of improvement of this organizational mechanism.

Optimization of functions of the existing regulators of branch or creation of the new organizational structures aimed at innovative transformations can be options of improvement of this organizational mechanism.

⁴⁹ Kuskov A.S., Dzhaldyan Y.A. Basis of tourism. - M.: KnoRus, 2013. – 400 p.

Besides, improvement of interdepartmental and inter-industry interaction on the principles of the state-private partnership presented horizontal (between the state and non-state institutions) and vertical (between government institutions of different level) interrelations is necessary ⁵⁰.

All aforesaid leads to the statement, that the tourist policy is a system of norms, rules and methods, which are applied by parliaments, the governments, the state and private organizations, associations and institutions, which are responsible for tourist activity for the purposes of its regulation and coordination, creating favorable conditions for its development.

In our opinion, the basic principles of state regulation of tourist activity should be the following:

- assistance of tourist activity and creating favorable conditions for its development;
- definition and support of the priority directions;
- formation of idea of the Republic of Kazakhstan to be the country favorable for tourism;
- protection of the rights of tourists and support of tour operators, travel agents and their associations.

Increase in efficiency of functioning of tourist sector depends on the decision at the level of the state of the following main tasks:

- developments of the statistical database on the tourist markets, promoting planning in the sphere of tourism;
- creations of systems and definition for the procedure of tourism planning;
- partnership between the governments of the host countries and private tourist sector in strengthening of tourist communications;
- cooperation between the countries on a regional basis under the following directions: marketing, standards of professional training, etc.;
- receiving necessary funds in the capital market for investments into infrastructure, equipment and objects;
- creations of all necessary conditions for use of economic benefits of tourism by local population;
- creations of specialized system of preparation of professional staff for tourist sector;
- developments of a wide range of the tourist products and services meeting requirements and desires of all segments and niches of the consumer market, marketing actions, etc.

These tasks have to be directed to for long-term perspective. Their solution will depend on volumes of investments into tourist sector. The solution of the specified tasks will allow to increase

⁵⁰ Weaver, D., & Lawton, L. Tourism management (4th ed.). Milton, Australia: John Wiley & Sons. 2010. - P. 420.

efficiency of tourist sector at all levels, to receive the maximum benefit and to provide the high level of satisfaction of tourists, promoting mutual understanding and mutual respect between people of the world and their cultures.

Thus, state management of tourist sector development has to be implemented on the basis of the uniform organizational and economic mechanism. In the conditions of the Republic of Kazakhstan, general provisions of formation and realization of the state tourist policy need regional adaptation. In this regard, state management of tourist sector development has to be two-leveled: national and local. The offered system of state regulation of tourist sector development, and also model of the state support of tourist sector can effectively realize the state tourist policy at the regional level.

It will be promoting by complex development of the main tools of the state tourist policy of RK, and also improvement of its investment, financial, organizational mechanisms.

4.2.3 Positioning of Kazakhstan at world tourist market and development of touristic image

The image reality of Kazakhstan in the sphere of tourism has to act as a territorial resource and a source of competitive advantages. In this case it is essential to understand that such an approach at the center of country competitiveness lies not a competition of production, but the country itself has a determined "symbolical value". Providing information on and promoting demonstrable environmental initiatives, under the influence of delivering proactive information and communicative technologies such "symbolical value" becomes a part of the progressive image of the state

Creation of positive tourist image of the country can pursue the different aims. One regions only step the way of creation of the positive image, others need only small efforts on promoting of the potential cultural potential as valuable asset and important component of preservation of the competitive advantages.

In any event, the touristic appeal of the country acts as a key link of its tourist attractiveness. This attractiveness assumes a number of components, which define high competitiveness of the region. For example, the high level of safety, service driven and motivated employees, the developed infrastructure, highly expressed cultural heritage, etc.

Initiating creation of tourist image of the country it is necessary to adhere to certain methodological principles. So, it is necessary to distinguish the following ones:

1. Tourist image reflects not only natural or historical and cultural monuments, it is also formed within a certain social group, which owing to an imagining extends its influence.

2. In other words, image of the country substantially depends on its perception by their citizens. For this reason, image of the state has to be certain, widespread and clear.

3. Tourist image of the country in many respects depends on what material and cultural wealth it exports.

4. At all variety of characteristics of the country, that significantly complicates process of an imagining, each state has its core (nucleus) or basic image. It is a basis, which provides image representation of the country. On condition of successful definition of such basic image, it provides further separation and a producing the secondary and supporting images.

5. Process of image creation has to be active and purposeful. It allows updating of differences, desirable and important for perception by target audience of the state and "shadowing" of its characteristics, which have negative coloring.

6. The central place in tourist image of the country in the conditions of globalization should be occupied by symbols, which are responsible for its individualization, uniqueness. In this case the main task will consist in translation of individual regional symbols into language of the standard values to make image clear to the target audience.

7. Romantic and heroic intensions of its past and the present have to become an important methodological imperative of tourist image of the country. The region has to be proud of the achievements in different spheres of life.⁵¹

On the basis of the aforesaid, it is possible to draw a conclusion, that the contribution of tourist image of the state to form its competitiveness is defined by its feature to activate the internal capacity of the territory, not only material, but also cultural. To convert it into an important resource defining the general perception of the country and its competitiveness in the long term.

Data from UNWTO show, that for one additional foreign tourist coming to Kazakhstan it will generate an average of 1000 euros' inflow to the national economy. In general, states spend between 3 and 10 euros for noncommercial advertising of a tourist product. According to UNWTO, the average size of budgetary funds allocated within European countries for promotion of a tourist product is circa 31.7 million euros.

Unfortunately, in Kazakhstan there were no research on the amount of the budgetary financing on attraction of one foreign tourist.

⁵¹ S.A. Arutyunyan, N. V. Solovyova. Organizational-economic approach to formation of tourist sector of economic. // Messenger of ASTU. Series economics. – 2010. - №2. – p.151-158.

Therefore, the lack of current measures for promotion of a national tourist's product undertaken by Kazakhstan, can only at minimum, identify the parameters of the existing tourist flow.

Creation of the image of Kazakhstan as tourist center with unique potential, open for the whole world and safe for tourists is one of the main factors for their attraction to the country. Only a broad spectrum (non-commercial) advertising campaign of tourist opportunities within Kazakhstan, concentrated on the key foreign and domestic tourist markets, will allow access to attracting internal and external tourism in order to generate a profitable component for all tourist areas of Kazakhstan with rich tourist resources. Special attention also needs to be paid to comprehensive promotion of Kazakhstan tourism in the CIS countries, to promote not only revival of traditional tourist routes, but also representation of new tourist products.

Arranging of sponsored complementary 'info tours' for representatives of foreign mass media and tour operators is one of the available and effective instruments for promotion of a national tourist product to the world tourist market.

It should be noted, that when using this tool, the combination "price - quality" is got as a result, that is, arranging of info tour is much cheaper than advertising in foreign tourist mass media. At the same time, journalists have an opportunity to see with their own eyes and estimate a condition of development of tourism in the country, but not to judge it on glossy advertising pictures in guides and catalogs.

It should be noted that, despite a decent volume of work towards the creation of Kazakhstan as a favorable tourist image on the world scene, there should be more focus and urgency in creating far more international 'positive' opposed to 'negative' recognition of the country in the world market (Figure 13)

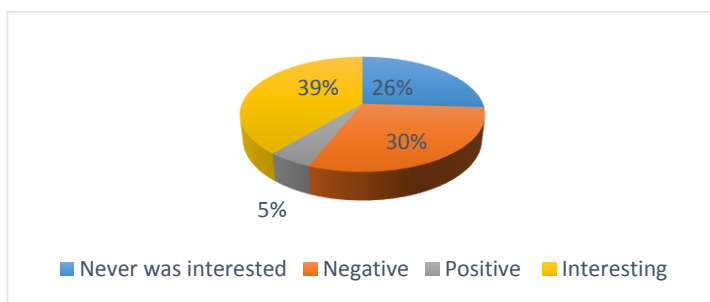


Figure 13 Associations with the name «Kazakhstan»

Note: the diagram was compiled on the basis of the source⁵²

⁵² ITB WORLD TRAVEL TRENDS REPORT December 2015. Messe Berlin GmbH. ITB World Travel Trends Report 2015 / 2016

According to the research "IPK International" in international markets, the name "Kazakhstan" causes positive associations only with 5% of respondents, 39% of respondents have shown interest. At the same time 30% of respondents connect Kazakhstan with negative representations, and 26% - at all were never interested in Kazakhstan.

In the world 58% of the interviewed respondents on average, have some idea of Kazakhstan. In the Asian region the best indicators of recognition at Kazakhstan are in Japan – 79%. It naturally is explained by the high level of business cooperation of these countries, and as a result - good awareness of Japanese people about Kazakhstan.

In Europe the best awareness of Kazakhstan is demonstrated in Great Britain. It is due in part, because approximately 5,000 Kazakh Nationals (the most numerous Kazakh community in Western Europe) live there. (Figure 14).

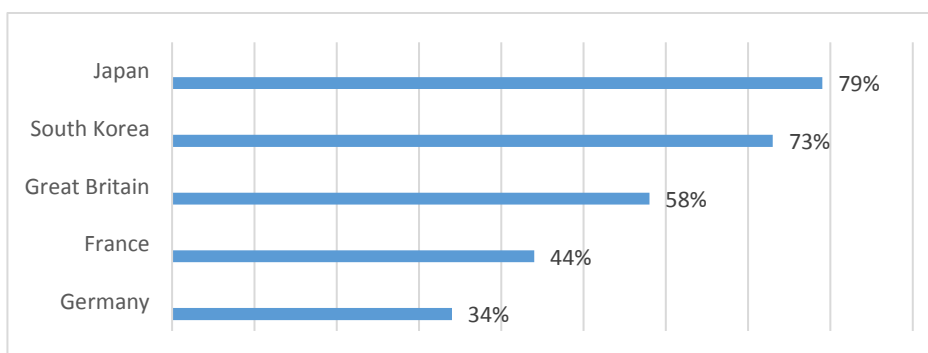


Figure 14 Awareness of Kazakhstan in Europe and Asia

Note: the diagram was compiled on the basis of the source⁵³

The main associations with Kazakhstan on the world scene: Russia / former USSR, extensive territories and Islamic States and Steppe area.

Also Kazakhstan is known because of oil, minerals, grains and space industry (Baikonur). Relatively little is connected with tourism therefore it is not a surprise that not much known to the wide range of world community. This results from the fact, that long time the attention wasn't paid to tourism.

Its development happened by the residual principle. Tourism wasn't considered as the strategic branch, which can give the considerable income to the state.

⁵³ ITB WORLD TRAVEL TRENDS REPORT December 2015. Messe Berlin GmbH. ITB World Travel Trends Report 2015 / 2016

Considering the image of Kazakhstan in the world tourist market, it is possible to draw a conclusion, that positioning of Kazakhstan as attractive tourist direction has been insufficiently developed and has weak results.

On average throughout the world, only 42% of the interviewed respondents have any idea about Kazakhstan.

Higher recognition of Kazakhstan exists, of course, in Asia. So, from foreign countries in Asia, Japanese know Kazakhstan better – 75% of the interviewed respondents.

In Europe the situation with image of Kazakhstan it is much worse. So the best result of recognition of Kazakhstan was shown by British – 41% participating in a poll (Figure 15).

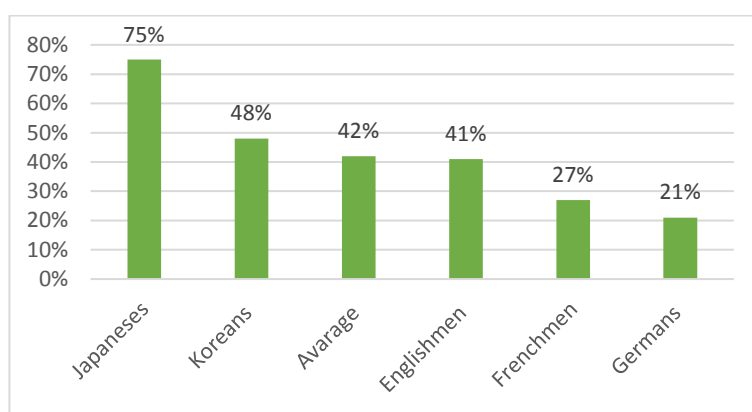


Figure 15 Image of Kazakhstan

Note: the diagram was compiled on the basis of the source⁵⁴

Tourist image and perception of the state, is a starting point of stimulation for a range of marketing initiatives to promote Kazakhstan as a new tourist destination. At the same time, it is important understand the image of the country as a "set of the emotional and rational representations from an external global perspective, following from the comparison of all signs of the country, own experience and rumors, influencing the creation of a certain image"⁵⁵.

Practically all developed countries stimulate tourism development. For these purposes brands of the states are created and their image is worked out. Such tactics is repaid completely, as in this case the name of perhaps a certain resort, and the country in general is promoted not just that is effective not only for involvement of tourists, but also international investors.

For Kazakhstan an important need is activation of work on formation of positive tourist image of the country. Kazakhstan has to be recognized around the world. It is important not just

⁵⁴ ITB WORLD TRAVEL TRENDS REPORT December 2015. Messe Berlin GmbH. ITB World Travel Trends Report 2015 / 2016

⁵⁵ Marchello Risi. Statistics of international tourism -2008 // UNWTO NEWS. – 2009. – №1. – p. 7-9.

to attract tourists, but also to induce them to come regularly, to recommend the territory for visit to their friends. For this purpose, a specially developed program for formation of image of the territory is necessary.

When carrying out advertising campaigns of a domestic tourist product in the foreign markets it is necessary to understand, that success secret lies not just in the number of emergence of advertising materials in newspapers, on radio and television. Key to success is also the in correct use of public relations development. Formation of image of the new tourist direction for the country needs to be carried out in four stages.

First stage. At the first stage the research and the analysis of the world market of tourism is conducted, short-term and long-term aspects of own and competitive offer are defined. At the same time transport issues need to be addressed, the development of a convenient transport infrastructure, maintenance of service and quality of the services are solved.

Next is places for stay and food. Depending on the capacity of transport and means of placement, the question of possible number of tourists and duration of their stay needs to be identified. Here the analysis of the competitive offers applying for attention of potential clients is carried out.

Second stage. At the second stage definition of the purposes of complex tourist policy is supposed. It includes the following issues: What market the Kazakhstan tourism would enter? With what tourist product will it compete? What markets will be the priority?

It is necessary to concentrate the efforts on the most perspective markets. Those for Kazakhstan, according to the researches of “IPK International”, are the markets of Great Britain and South Korea – the markets of the first priority, France and Germany – the markets of the second priority, Japan – the market of the third priority.

The third stage is the realization of the set goal. Unique, special shape of the offered national tourist product is created, its exclusiveness and special appeal are emphasized. Also the market segmentation is carried out, the image of the preferable client, including a nationality, age, education, belonging to this or that group on the income and a social status, the state of health, marital status, etc. are defined.

For Kazakhstan the image of the preferable tourist from the countries with the greatest interest in a domestic national tourist's product is presented by the following indicators - lovers of unspoilt, untouched nature, magnificent landscapes and wilderness, cultural and historical sites, men and women, age of 30-55 years, secondary and higher education, – average and above an average income level.

After definition of target groups of potential consumers, it is necessary to complete the offer, i.e. to establish a set of tourist services and goods, which is capable to satisfy needs of the tourist and to provide the maximum income for Kazakhstan. According to the data, obtained at poll of potential tourists, the most attractive resource of tourism in Kazakhstan are the nature and landscapes, which make 70% of the attractive tourist capacity of Kazakhstan. Also great interest is given to the following types of tourism:

- "Steppe safari" – driving on SUVs, living in yurts or in trailers
- Combination of ecological and natural types of tourism
- Tours on the Great Silk way through several countries.

Fourth stage. The fourth stage presupposes the selection and use of a combination of instruments of sale and promotion of tourist services – registration of a product, the choice of a form and price level, channels of realization are carried out; assistance to sale, including information and advertising campaigns.

Experience of realization of the state promotional and informational strategy indicates the need for diversification of a tourist product: along with the traditional tourist offer, it is necessary to provide display of new tourist products, distribution of wider information on national traditions, crafts, the new museums and expositions, event actions and tourist services. All this demands the development of the long-term information campaign, directed to formation of a positive image of the country for assistance to development of outbound and inbound tourism.

Complexity at image positioning consists in creating an image, which conveys advantages and unique qualities, thanks to which this tourist direction is steered away from those of the other countries. It is not enough just to advertise a tourist product similar in the consumer qualities to analogs of other countries. It is necessary to develop justification of the fact that Kazakhstan is really a new direction in the world tourist market and offers an original product.

Visual symbols (identifiable branding) play a noticeable role in marketing of the tourist direction. Many characteristic views of places are forever cut in consciousness of people (Table 12). These visual symbols constantly appear on official documents, brochures, billboards, video records, badges and in dozens of other places.

Table 14 The most known visual symbols

Moscow	Red Square
London	Big Ben
Berlin	Brandenburg Gate

Paris	Eiffel Tower
Copenhagen	Little Mermaid

Kazakhstan has many objects interesting to tourists, which are capable to become visual symbols of the program for promotion of a domestic tourist's product to the world markets. Bayterek, the mausoleum of Kozha Ahmet Iassau, Baikonur can become such symbols for the country.

To be successful, the visual symbol has to strengthen the main idea of the image. If the visual image doesn't correspond to an advertising slogan, a subject or positioning, it undermines confidence to the advanced country. At promotion of Kazakhstan in the world market it is necessary to use the strategy of a diversified visual themes and images.

In the strategy of diversification, the wide range of the visual images, connected with Kazakhstan, is represented to the audience. The purpose is a destruction of the idea, that this place has single character. It is necessary to show all rich potential of tourism in Kazakhstan. Its rich culture, beautiful nature, modern economic potential. Many European states apply the strategy of diversification. On the other hand, even here present different levels of visual images. Two or three world-wide well-known images usually have a priority value. They are supplemented with the whole set of "small" images, by means of which the full-fledged and versatile image is being built.

The majority of image campaigns include bright slogans, publications, brochures, prospectuses and videos. But image is realized fuller and more comprehensive by means of events and actions.

Successfully realized effort can create to the state a positive welcoming brand and image forever. Kazakhstan has enough resources for holding various cultural, sporting and entertaining events. And such events are held from time to time. Now it is necessary to systematize these events to served business of creation of attractive image of Kazakhstan, despite of the fact in what sphere they are held. It is necessary to advertise these events in world mass media. Also - to attract a large number of participants and journalists. Thus, formation and, the most important, maintenance of positive tourist image is the main priority for Kazakhstan in development of inbound tourism. Of course, existence of the developed infrastructure, competent staff and the state support of tourism organizations are also the important aspect, but without recognition of the country in the world all these elements of the developed tourist branch are for nothing. Therefore, for domestic tourism it is necessary to start creation of image of Kazakhstan as new tourist direction, using rich international experience and Kazakh enthusiasm.

4.2.4 Marketing and promotion of Kazakh tourist product

Each tourist cluster has to organize development of several tourist products, but the choice and priorities of tourist products depend on potentials of development of each product in each cluster. In general, in the Republic of Kazakhstan development of the following products of tourism is necessary: "MICE tourism", "Cultural tourism and a tour", "Active and adventure recreation", "Rest in mountains and on lakes", "Beach tourism" and "Short-term rest".

MICE tourism - belongs to type of the organized trips connected with business motives: business meetings, incentive tours, conferences, exhibitions, actions, meetings of the working groups, seminars and leisure time in business trips. Europe, China and Russia are the main countries, generating tourist arrivals in Kazakhstan on this tourist's product.

Cultural tourism and tour - organized tours of and tours without the guide in places of cultural monuments and historical heritage. Kazakhstan, Europe, China, Russia, the Middle East, India and the countries of the Asian region constitute the main countries, generating tourist arrivals in Kazakhstan under this tourist's product.

Active and adventure tourism is a kinds of activity outdoors, including "soft" kinds of activity (camping, walking, driving the bicycle, the all-wheel drive car, nature research, riding, observation of birds, fishing and hunting) and "rigid" kinds of activity (rowing on a canoe, alloy on a kayak, spelunking, driving the mountain bicycle, skiing on the cross-country terrain, mountaineering, a paragliding, rafting, rock-climbing, and a jeep safari). Kazakhstan, Russia and Europe are the main countries, generating tourist arrivals in Kazakhstan on this tourist's product.

Rest in mountains and on lakes – are programs of various activity in the sphere of rest and recreation – time of summer and winter holiday for couples, families and children, rest during the official days off, active kinds of activity in mountains, and also ecological tourism. Kazakhstan, Russia and China are the main countries, generating tourist arrivals in Kazakhstan on this tourist's product.

Beach tourism – is a stay in coastal zones with recreational purposes and the purpose of rest, as well as water sports, driving by boats and yachts (sea rest). Kazakhstan, Russia and the countries of the region are the main countries generating tourist arrivals in Kazakhstan on this tourist's product.

Short-term rest – trips, which usually last from one to four days, such as weekend tours, visit of sights in the city and around, outdoor recreation, places of cultural monuments and

historical heritage, and also short-term breaks for special cases (for example, a honeymoon, rest for New year eve, annual meetings, etc.). Kazakhstan, Russian Federation, Europe and the Middle East are the main countries, generating tourist arrivals in Kazakhstan under this tourist's product.

The first three tourists are the products of "quick effect" result, considering that they are ready for the moment or can be rather easily ready for commercialization within the next four-six years.

Three other tourist products (rest in mountains and on lakes, beach tourism, and short-term rest) are "strategic products", as their development demands considerable investments through strategically important (national) projects in the field of tourism that means their importance during seven-twelve years.

Ecological tourism – is a factor of sustainable development. Need of development of ecological tourism in the Republic of Kazakhstan is caused not only by economic factors - creation of new jobs, development of local communities in the remote regions, but also by the social order - needs of the population for more complete, system approach to problems of health protection and use of free time. According to experts of the World tourism organization, ecological tourism over the last ten years becomes the most popular and is one of instruments of sustainable development of any state. As have shown the researches results of tourist potential, Kazakhstan has great opportunities for development of ecological tourism. Its basis is made by a unique environment and landscapes in the center of Eurasia, numerous natural, historical monuments, cultural and ethnic heritage of the people, inhabiting the territory of Kazakhstan during various historical periods.

However, in spite of the fact, that ecological tourism differs from other types of tourism in insignificant impact on the environment and doesn't need especially developed infrastructure, activity in this direction meets serious difficulties because mostly recreational and tourist infrastructure is still at a formation stage.

Economic potential of ecological tourism in Kazakhstan is almost unlimited, however its formation and development will require considerable capital investments and expenses. Creation of necessary infrastructure for ecological tourism will allow to provide availability of unique corners of the nature to tourists. It is necessary to create conditions for attraction of investments and the private capital for the purpose of implementation of investment projects on objects of ecological tourism, such as construction of a tourist complex on Rakhmanovsky spring near Mount Belukha in the East Kazakhstan region, creation of network of ski resorts in Almaty region, and others.

5 Conclusion

In spite of the fact, that Kazakhstan possesses an extensive territory, which includes potentially attractive tourist zones location, the tourist branch of the country is characterized by an insufficient level of development. Its share in gross domestic product is about 1.6%.

At the same time, positive dynamics of development of tourist branch of Kazakhstan should be noted. Taking four years (2012 to 2015 inclusive) the volume of the income from tourism has increased by 43.6% and following the results of 2015, the direct contribution of tourist industry to GDP of Kazakhstan has made 486.79 billion Tenge.

Tourist infrastructure of Kazakhstan at the present stage of tourism development is at a stage of rapid growth. But this rapid raising of the serving sphere of tourism will satisfy needs of tourists only for the near future while now, the existing infrastructure doesn't provide satisfaction of all inquiries of both domestic, and foreign tourists. It needs considerable investments.

A very important role in development of tourism in every country belongs to the state. Support and success in cooperation between state and private ventures, involved in the tourism industry.

Increase in efficiency of functioning of tourist sector in Kazakhstan depends on the decision at the level of the state of the following main tasks:

- developments of the statistical database on the tourist markets, promoting planning in the sphere of tourism;
- creations of systems and definition for the procedure of tourism planning;
- partnership between the governments of the host countries and private tourist sector in strengthening of tourist communications;
- co-operation between the countries on a regional basis under the following directions: marketing, standards of professional training, etc.;
- receiving necessary funds in the capital market for investments into infrastructure, equipment and objects;
- creations of all necessary conditions for use of economic benefits of tourism by local population;
- creations of specialized system of preparation of professional staff for tourist sector;
- developments of a wide range of the tourist products and services meeting requirements and desires of all segments and niches of the consumer market, marketing actions, etc.

For the purposes of forced development of quality of staff training in tourist branch of Kazakhstan it is necessary to introduce the principles of continuous education in training process.

For current situation of tourism development in Kazakhstan it is expedient to apply the staff scheme, including two systems of training:

- specialized professional training for the enterprises, which are directly taking part in production of a tourist product;

- training of specialists of mass professions for allied industries of national economy.

Also there is a need in development of the model for universal specialist in tourist sphere.

Setting the tasks of improvement of quality of tourist education, it is necessary to consider tendencies of development of world tourism, experience of the advanced foreign countries in educational process, which stays in a condition of constant search of ways of improvement of tourist education.

The important need for Kazakhstan is an activation of the work on formation of positive tourist image of the country. Kazakhstan has to be recognized around the world. Directly when forming an effective positive image of Kazakhstan as a new and attractive tourist destination in the world market, three main tools are used: Slogans, Subjects and positioning; Visual symbols and events.

Thus, formation and, most important, maintenance of a positive tourist image is the main priority for Kazakhstan in the development of inbound tourism. Of course, the existence of a developed infrastructure, competent staff and the state support of tourism organizations are also very important aspects, but without recognition of the country in world markets, all these elements, when trying to develop the tourist industry, will mean nothing. Therefore, for domestic tourism, it is necessary to start creating the World's image of Kazakhstan as The new tourist destination, using rich professional international experience and own enthusiasm.

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