

Czech University of Life Sciences Prague

Faculty of Economics and Management

Department of Economic Theories



Bachelor Thesis

Development of Tourism in Kazakhstan

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Development of Tourism in Kazakhstan

Objectives of thesis

The main objective of the bachelor thesis will be to evaluate the potential of tourism in Kazakhstan, including the impact of the coronavirus crisis.

Methodology

The theoretical part of the work will be based on the study and processing of relevant literary and Internet sources. Kazakhstan's tourism will be described and analyzed from history to the present. In the practical part available data from the impact of the coronavirus crisis will be implemented in the results of the work. The work will also use methods of comparison, synthesis, deduction and SWOT analysis and tables will be created. The results of the work, including the possibility of better use of the potential of the tourist hand of Kazakhstan will be summarized in the conclusion of this bachelor thesis.

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Tourism, development, history, potential, crisis

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Declaration

I declare that I have worked on my bachelor thesis titled "Development of Tourism 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 30.11.2020 _____

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Development of Tourism in Kazakhstan

Abstract

Kazakhstan has a huge potential, both for the development of domestic tourism and for welcoming the foreign travelers. This thesis will show how tourism is developing in Kazakhstan since 20th century and all problems and perspectives which influence different types of tourism in Kazakhstan

Keywords: development, tourism, history, infrastructure, crisis

Rozvoj cestovního ruchu v Kazachstánu

Abstrakt

Kazachstán má obrovský potenciál jak pro rozvoj domácího cestovního ruchu, tak pro přivítání zahraničních cestujících. Tato práce ukáže, jak se v Kazachstánu vyvíjí cestovní ruch od 20. století, a všechny problémy a perspektivy, které ovlivňují různé typy cestovního ruchu v Kazachstánu

Klíčová slova: rozvoj, cestovní ruch, historie, infrastruktura, krize

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Introduction

In the conditions of market relations, tourism is one of the most dynamic sectors of the economy. High rates of its development, large volumes of foreign exchange earnings actively influence various sectors of the economy, which contributes to the formation of its own tourism industry. An important advantage of the tourism industry is that, with relatively small investments, it allows you to immediately receive income, while ensuring a fast turnover of funds.

The tourism industry is multifaceted and includes many services designed to attract customers: hotels, travel companies, clubs, fitness centers, sports grounds, etc. Tourism is one of the largest employers in the world, employing a large number of people, from specialists directly to the tourism industry, to transport workers, accommodation facilities and a huge number of various entertainment establishments.

Significant influence and social functions of tourism. This function is especially evident in developing or small countries, where tourism is often the main source of budget income.

In the Republic of Kazakhstan, tourism at the present stage is at the stage of rapid growth. All types of tourism are actively developing. It is also necessary to note the positive dynamics in the hotel industry, where both quantitative and qualitative growth is taking place. The number of travel companies and the number of people employed in tourism is increasing annually.

But, despite the general positive development trend, tourism in Kazakhstan also faces certain problems.

The topic of my thesis is the analysis of the problems of tourism development at the present stage in the Republic of Kazakhstan. Considering this topic, it is necessary to highlight its relevance, because tourism in Kazakhstan is a priority sector for the development of the non-resource sector of the economy. The government of our country pays considerable attention and creates all conditions for the development of tourism.

The task is to consider the current state of development of the tourism industry, analyze the problems faced by the industry in its development. The tourism industry in our country remained secondary for a long time and was financed on a leftover basis. Tourism was not

paid attention to as a branch of the economy, although the resources were more than sufficient.

Now tourism is one of the seven priority clusters for the development of the economy of Kazakhstan. Tourism is the development tool, thanks to which Kazakhstan has good chances to enter the international market with a competitive end product.

In the diploma work, an analysis and assessment of the current state of tourism was carried out, the main problems were identified, such as insufficiently developed tourist infrastructure, poor provision of the industry with qualified personnel and unsatisfactory positioning, the lack of a positive tourist image in world markets.

The purpose of the thesis based on the analysis of the current state of the tourism industry in the Republic of Kazakhstan c.

The goal was ensured by the set and solved tasks, the main of which were:

- study of the theoretical foundations of tourism development;
- consideration of the current state of the tourism industry in Kazakhstan;
- highlighting the main problematic elements of tourism in Kazakhstan;
- analysis of the prospects for the development of the tourism industry of the Republic of Kazakhstan.

Objectives

The main objective of the bachelor thesis will be to evaluate the potential of tourism in Kazakhstan, including the impact of the coronavirus crisis.

Methodology

The theoretical part of the work will be based on the study and processing of relevant literary and Internet sources. Kazakhstan's tourism will be described and analyzed from history to the present. In the practical part available data from the impact of the coronavirus crisis will be implemented in the results of the work. The work will also use methods of comparison, synthesis, deduction and SWOT analysis and tables will be created. The results of the work, including the possibility of better use of the potential of the tourist hand of Kazakhstan will be summarized in the conclusion of this thesis.

Chapter 1. History of tourism development

The word “tourist” appeared in English at the beginning of the 19th century and translated from English means: one who travels for his own pleasure or expanding his cultural horizons.

In his monograph, M.B. Birzhakov defines modern tourism as follows: “Tourism is the temporary movement of people from their place of permanent residence to another country or another locality within their country in their free time in order to get pleasure and rest, health and medical, guest, cognitive, for religious or professional business purposes, but without engaging in paid work from a source in the place visited.

Tourism as a field of activity in its present state arose and took shape at the end of the 19th century, and received its true intensive development only in the second half of the 20th century, precisely in the century of the rapid development of technology, technology, social relations, for which it received the loud title of “phenomenon of the 20th century ”.

Taking into account the technical, economic and social prerequisites, as well as the target functions of tourism, we can divide the history of this direction into four stages:

Stage 1: before the beginning of the 19th century - the prehistory of tourism;

Stage 2: the beginning of the XIX century - the beginning of the XX century - the emergence of specialized enterprises for the production of tourist services;

Stage 3: the beginning of the XX century - before the Second World War - the beginning of the formation of social tourism;

Stage 4: after the Second World War - the modern stage - mass tourism, the formation of the tourism industry as an intersectoral complex for the production of goods and services for tourism. It is at this stage that tourism acquires a truly massive character: from a luxury item it becomes a need for the majority of the population of highly developed industrial countries. To a certain extent, this was facilitated by a reduction in working hours, and, accordingly, an increase in free time. A powerful leisure industry is being formed with its own institutions, product, production cycle, methods of organization and production management.

At a certain stage in the development of the economy, when the need for travel increased sharply, manufacturers of travel services appeared. This led to the formation of a special type of product - tourism. Thus, tourism emerged as a commodity that can be bought and sold in the consumer market and which is sold in the form of tangible and intangible services. A peculiar advantage of tourism services as a commodity is that a significant part of these services are produced with minimal costs on the spot and, as a rule, without the use of foreign currency.

The historical prerequisites for tourism in Kazakhstan are the formation and development of the Great Silk Road, the beginning of the formation of which dates back to the third millennium BC. This system of caravan roads, which in ancient times and in the Middle Ages crossed Eurasia from the Mediterranean to China, served as the sources of the emergence and development of trade and cultural ties between peoples, states, regions located in the zone of this path. It was here that the largest shopping centers were built, where travelers from different countries stayed. The cities had trade buildings and caravanserais. Accommodation of all traveling people in yurts became simply impossible, inns began to appear, often the most necessary services were offered: accommodation, food, water. To organize overnight stays for caravan participants along the trade routes, special accommodation points were also created - caravanserais, which, as a rule, include premises for people and corrals for camels and horses. All this was surrounded by a fortress wall, protecting from natural disasters, as well as from robbers and robbers.

Information about the territory of Kazakhstan before the beginning of the 18th century is scarce and not always reliable. They came, as a rule, by chance, mainly from Russian merchants and ambassadors. Only under Peter I began to some extent organized expeditions to the western part of Central Asia. Only in the first half of the 19th century, some of the outskirts of Turkestan began to be visited by scientists-travelers. However, the central part of Central Asia remained practically unknown, both in terms of geographical characteristics and economic opportunities.

With the accession of Kazakhstan to Russia, an active study of its vast territory began. At this time, the borders of Russia were already in contact with the Central Asian khanates. Central Asia was annexed to Russia in the 19th century. In 60-70s scientific expeditions organized by the Russian Geographical Society and the Society of Natural Science Lovers moved to Kazakhstan.

These expeditions aroused great interest among leading Russian natural scientists such as G.S. Karelin, Ch. Ch. Valikhanov, G.N. Potanin, P.P. Semenov, N.A. Severtsov, I.V. Mushketov, K.I. Bogdanovich, L.S. Berg and others. For the first time, discovering the majestic expanses of the nature of Kazakhstan, studying the flora and fauna, the flow of rivers and the structure of mountains, they strove to enrich Russian science and put it in the forefront of world science. A characteristic feature of their activities was a friendly attitude towards the local population, respect for their customs and culture. In turn, the Kazakhs provided invaluable assistance to many expeditions as guides, translators and caravans.

Research by scientists of the vast expanses of Kazakhstan gave impetus to the development of tourism. Back in the 19th century, inquisitive people, alone or in groups, began to conduct excursions, hikes and walks to picturesque places. Mountain landscapes were especially attractive for them. Although, on the territory of Kazakhstan, mountain ranges do not exceed 10%, they have attracted and attract travelers with their pristine beauty.

The first tourist of Semirechye can be considered the Cossack Esaul Aleksey Vasilyevich Khoroshin, who not only traveled a lot along the foothills of the Zailiyskiy Alatau, but also made an attempt to climb the Talgar summit in 1875. He managed to reach an altitude of 12,050 feet. Later, at the beginning of the 20th century, such a form of travel appeared, which involved entering medical places. Accommodation facilities were built near mineral deposits - sanatoriums, which were famous for their comfort and various entertainment. With the development of medical tourism in Kazakhstan, the role of mountain tourism has increased, and accommodation facilities for tourists have begun to be built.

Tourist bases were built in the most picturesque places of the republic. Every year the number of places in additional types of accommodation facilities begins to increase faster than the number of places in hotels and motels. New types of accommodation facilities appear. Often it was even difficult to distinguish between the main and additional types of accommodation, even in rented private apartments of the owner, they provide vacationers with the same services as in hotels.

In 1930, under the leadership of F.L. Savin, a team of employees of the Almaty city post and telegraph, consisting of 16 people, set off along a simple route: Almaty - Medeo - Kokzhailyau - Big Almaty Lake. In January 1931, V.M. Zimin conducted the first winter hike of tourists along the route: Almaty - Uzunagach - Kurdai pass.

In the same 1931, in the capital of the republic at the Zhetysu provincial museum, the first cell of the All-Union Voluntary Society of Proletarian Tourism and Excursions, OPTE, was organized, which included 10 people. A hut for tourists was built in the Gorelnik tract, near Almaty, by the forces of the tourist asset, which in 1936 was transformed into a tourist base "Gorelnik" for 50 sleeping places.

In 1938, the first mass tourist event took place - a rally in the Kokzhailyau tract, which brought together about 200 participants.

With the beginning of the Great Patriotic War, the Kazakhstani OPTE Council ceased its activities. After the war, they began to train sports cadres of climbers and skiers for the republic, and in 1953 the tourist center "Issyk", located on the shores of the lake of the same name, entered the operation of existing tourist facilities. Much later, because of the mudflow hazard, these camp sites were closed.

In 1952, the All-Union Central Council of Trade Unions opened a tourist and excursion department (TEU) in Kazakhstan. Since 1958, it became known as the Central Asian TEU. In 1960, the Republican Administration for Tourism was created under the Kazsovprof. In 1962, the previously existing TEUs were reorganized into councils for tourism and excursions. In 1965, the Kazakh Republican Council for Tourism and Excursions in Almaty and 5 regional councils were organized: Almaty, East Kazakhstan, Karaganda, Ural and Chimkent.

With the development of international and domestic tourism, the demand for cheaper accommodation facilities - campings - began to grow. Their development is typical for the period 60-80 years.

Tourist hotels are located and built mainly in large cities of the republic, where there are historical, architectural and archaeological monuments, museums. All hotels in Kazakhstan served mainly routes of excursion and educational nature, an important place in which is the acquaintance of guests with the Kazakh national culture.

A powerful impetus to the development of tourism was given by the decree "On measures for the further development of tourism and excursions in the country" in 1969. New regional councils for tourism and excursions, excursion bureaus, travel and excursion agencies began to appear in Kazakhstan. Particular attention was paid to strengthening the

material base of tourism in the republic - building and equipping new tourist bases and hotels with restaurants, cinemas and other cultural and consumer services.

Gradually, trips abroad are becoming more and more popular among Kazakhstanis. international tourism begins to develop. The official beginning of its development can be considered 1956, when 25 foreign guests first arrived in the republic.

During the period when Kazakhstan was part of the USSR, tourism as a branch of the economy was not considered at all. Travels were made only for the purpose of recovery, recreation and excursions. Domestic tourism significantly prevailed over international (inbound and outbound), since the difficulty of obtaining visas and closed borders significantly complicated its development. At that time, the main tourist areas of the USSR were the historical centers of Russia and Central Asia, then the Crimea and the Baltic States. During the same period, all the most valuable that Kazakhstan had (a large territory with a wide range of natural and recreational resources, cultural wealth and historical heritage) remained in the shadows, unknown and unexplored, the country's attractions were practically not advertised, which entailed a lack of demand and tourist interest. Tourism in Kazakhstan during the Soviet period was one of the elements of the system of cultural and educational work that performed an ideological function and, despite its dominant role, was financed on a leftover basis, and also had no significant economic significance.

One of the reasons for the underdevelopment of the tourism industry in Kazakhstan was the fact that at the state level it was not deliberately dealt with as an economic sector. No attention was paid to integrated forecasting, long-term planning, territorial organization of tourism and non-governmental tourism structures. The factor hindering the development of the industry was also the lack of recognition of tourism activities as a priority by local governments, despite the fact that most of the revenue from tourism goes to the local budget.

With the beginning of a new page in the development of the country, with the adoption of the Declaration of State Sovereignty on October 25, 1990, Kazakhstan (at that time still the Kazakh SSR) took the first step towards the development of the tourism industry. In August 1991, the Ministry of Tourism was established.

With the acquisition of independence in the Republic of Kazakhstan (RK), the foundation was laid for the regulation of tourist activities and the revival of the historical and cultural heritage of the people.

The development of tourism in the country began to be regulated:

1. The Law of the Republic of Kazakhstan "On Tourism" dated July 3, 1992 No. 1508-XII;

2. By decrees of the President of the Republic of Kazakhstan:

2.1. "On the implementation of the Tashkent Declaration of the heads of the Turkic-speaking states, the project of UNESCO and the World Tourism Organization for the development of tourism infrastructure on the Great Silk Road in the Republic of Kazakhstan" dated April 30, 1997, No. 3476;

2.2. "On the State Program of the Republic of Kazakhstan" Revival of the historical centers of the Silk Road, preservation and successive development of the cultural heritage of the Turkic-speaking states, creation of tourism infrastructure "dated February 27, 1998 No. 3859.

The adoption of these documents had a positive impact on the development of the Kazakhstani tourism market.

But, perhaps, one of the key factors in the development of the tourism industry in the country after gaining independence on December 16, 1991 was the entry of the Republic of Kazakhstan into the UN World Tourism Organization as a Full Member in 1993, as well as the conclusion of the first international agreements on cooperation in the tourism field. At the same time, it is important to note that in most cases, the initiators of the signing of these agreements were the governments of foreign states, which call the republic "a promising partner" and see it as a rich tourism potential.

Tourism in many aspects has become a leader in the formation of market relations in Kazakhstan. As international and domestic experience shows, tourism in a short time can become one of the most profitable spheres of the economy. World experience also shows that the market economy is the most favorable economic environment for the development of tourist activities. This means that the process of development of tourism is inseparably linked with the expansion of the scope of market relations. Naturally, this industry itself, and the enterprises that are part of it, focusing directly on the consumer in their activities, are called upon to play an active role in the formation of the market space, including many areas and industries that to some extent ensure the development of tourism.

The beginning of the independence of the Republic of Kazakhstan is characterized by the rapid development of international tourism. In connection with the emergence of the possibility of free travel abroad during this period, mainly outbound tourism is developing, the share of which largely exceeds inbound and domestic tourism combined.

The first stage became a turning point in the development of tourism in Kazakhstan, the transition to a market economy contributed to a change in the structure of the tourism industry, an increase in the number of travel agencies, the emergence of new laws, norms and rules that create conditions for the development of private entrepreneurship in tourism. This stage should be given special attention, since it is characterized by an extensive growth in tourism indicators in the republic. To improve the quality and further development of the tourism industry, on February 4, 1992, the Cabinet of Ministers of the Republic of Kazakhstan approved the "Regulations on licensing, certification of tourism and sports activities", which decreed: "State, public and commercial organizations engaged in tourism activities, it is mandatory to obtain licenses from the Ministry of Tourism, Physical Culture and Sports of the Republic of Kazakhstan. " It should be noted that the introduction of this licensing made it possible to regulate tourism activities in the country, and, as a result, it was possible to observe an improvement in the quality of tourist services both in the country and abroad. It is also impossible not to note the strictly conducted inspection and supervision of tourist services, which allowed the state to control the quality of the services offered and, as a result, increase the responsibility of tourist enterprises for the reception, accommodation and customer service.

Attaching great importance to the role of tourism in the development of international cooperation and the formation of a strong economy, along with the aforementioned Regulations, on April 22, 1992, the Cabinet of Ministers of the Republic of Kazakhstan adopted a "Resolution on the Development of Tourism and Sports", the purpose of which was "... to release enterprises and organizations that direct profits from production activities for the development of tourism, physical culture and sports, reconstruction, construction of tourist and sports facilities, as well as those carrying out their construction, from the payment of income taxes in the part that is aimed at these purposes; to exempt tourist and sports facilities from value added taxes received from tourist and sports services ”.

At the first stage, there was a significant increase in the number of travel companies. If until 1991 only 3 organizations were engaged in tourism in Kazakhstan (“Kazakh

Republican Council for Tourism and Excursions”, “Intourist”, BMMT “Sputnik”), then in 1994 589 tourist organizations were registered in Kazakhstan.

Outbound tourist flows were focused on Poland, China (interest in shopping tours prevailed) and Bulgaria (for recreation). The countries generating tourist flows to Kazakhstan during this period were Great Britain, Germany, China and the USA.

The share of tourism in GDP during this period was: in 1991 - 0.03%, in 1992 - 0.09%, in 1993 - 0.06%, in 1994 - 0.08%.

The volume of outbound tourism in the period from 1992-1994 has grown three times. If in 1992 there were 233 990 tourists who left the republic, then in 1994, respectively, 700 492 tourists. The number of tourists visiting the republic has doubled over this period, since in 1992 236,044 foreign tourists were received in Kazakhstan, and in 1994, respectively, 450,718 tourists.

The reforms carried out, mainly the simplification of visa formalities, the opening of the borders of Kazakhstan for foreign investors, contributed to the rapid growth of, first of all, international tourism. Especially fast rates are typical for the indicators of sending citizens of Kazakhstan abroad. Much attention was paid to business trips of foreign tourists to Kazakhstan, which is associated with an increase in investment activity in the republic.

The second stage of economic transformation in tourism took place in the context of stabilization at the macro level. Therefore, all methods and forms of management, reforming and transformation were limited mainly on the scale of the industry. It should be noted that international tourism in the Republic of Kazakhstan until the 90s existed as one of the most ideological spheres of activity.

This stage is characterized by stagnation of inbound tourism indicators, as well as a decline in outbound tourism indicators. In the article "Formation of the tourism industry in the Republic of Kazakhstan" the author identifies the following factors, which, in his opinion, predetermined the same extensive growth of inbound tourism indicators in the country:

- simplification of visa formalities, removal of restrictions on the exit of citizens of Kazakhstan;
- speeding up the process of processing travel documents;

- the emergence and increase of the social stratum of the population, which has the financial capabilities to travel abroad;

- reorientation of trips of citizens of Kazakhstan from the domestic tourist market and the market of the CIS countries to the foreign market due to the rise in prices for vouchers to local resorts, growth of transport tariffs;

- use of foreign travel to solve material and everyday problems, replenishment of the Kazakhstani market of consumer goods.

At this stage, 7 international agreements on cooperation in the field of tourism were concluded: between the Republic of Kazakhstan and the Republic of Iran; between the Republic of Kazakhstan and the Republic of Pakistan; The Ministry of Tourism, Physical Culture and Sports of the Republic of Kazakhstan and the Ministry of Youth, Sports and Tourism of the Republic of Moldova; Ashgabat agreement on cooperation in the field of tourism with the CIS countries; between the Government of the Republic of Kazakhstan and the Government of the Republic of Uzbekistan on deepening cooperation in the field of culture, healthcare, science, education, tourism and sports; between the Ministry of Youth, Tourism and Sports of the Republic of Kazakhstan and the State Committee of the Kyrgyz Republic on Tourism and Sports; between the Ministry of Youth, Tourism and Sports of the Republic of Kazakhstan and the Ministry of Industry and Trade of the Hungarian Republic.

Since 1997, the republic has been training qualified personnel. Also in 1997, Kazakhstan for the first time took part in the world's largest annual International Tourism Exchange "ITB-Berlin" and at the meetings of the WTO General Assembly.

During this period, the following international agreements on cooperation in the field of tourism were concluded: between the Ministry of Youth, Tourism and Sports of the Republic of Kazakhstan and the State Committee of the Kyrgyz Republic on Tourism and Sports; between the Ministry of Youth, Tourism and Sports of the Republic of Kazakhstan and the Ministry of the Arab Republic of Egypt; between the Government of the Republic of Kazakhstan and the Government of the State of Israel; between the Government of the Republic of Kazakhstan and the Government of Georgia; between the Ministry of Education and Culture of the Republic of Kazakhstan and the State Agency of the Kyrgyz Republic under the Government of the Kyrgyz Republic on cooperation in the field of tourism, physical culture and sports; between the Government of the Republic of Kazakhstan and the

Government of Turkmenistan; between the Government of the Republic of Kazakhstan, the Government of the Kyrgyz Republic and the Government of the Republic of Uzbekistan on cooperation in the field of tourism.

In the late 90s of the last century, a number of separate events were held to form the republic's tourism industry.

On February 27, 1998, the Decree of the President of the Republic of Kazakhstan No. 3850 "On the State Program of the Republic of Kazakhstan" Revival of the Historical Centers of the Silk Road, Preservation and Continuous Development of the Culture of the Turkic-Speaking States, Development of Tourism Infrastructure "was issued, the National Company" Silk Road - Kazakhstan "was created.

Also in 1998, travel companies of Kazakhstan presented the republic at the International Tourism Exchange in Berlin.

In January 1999, the state management of tourism was transferred to the Ministry of Transport, Communications and Tourism of the Republic of Kazakhstan.

In September 1999, the Ministry of Transport, Communications and Tourism, together with the Ministry of Foreign Affairs of the Republic of Kazakhstan, adopted an interdepartmental Program of Activities of the Embassies of the Republic of Kazakhstan on the development of relations in the field of tourism, aimed at attracting investments in the tourism sector, increasing the tourist flow, as well as protecting interests and rights Kazakh tourists abroad.

In the period from 1999 to 2000, the following international agreements on cooperation in the field of tourism were concluded: between the Ministry of Education, Culture and Health of the Republic of Kazakhstan and the State Administration for Tourism of the PRC; between the Government of the Republic of Kazakhstan and the Government of the Turkish Republic; between the Government of the Republic of Kazakhstan and the Government of the Republic of Bulgaria on cooperation in the field of tourism.

The state concept of tourism development, including the issues of improving its infrastructure, significantly differed from those adopted throughout the world. Therefore, at this stage, the changes were difficult and inadequate.

The third stage began in 2000 and continues to this day. In general, it was this stage and the current policy in the field of tourism that gave impetus to progressive changes. A feature of this stage is the reform of the legal framework in the field of tourism and the development of a new concept of tourism development. State support for the first time is manifested in the financial support of the industry.

Thanks to a grant from the Convention Bureau of Tucson (Arizona, USA), from November 13 to 16, 2000, for the first time at the World Travel Market in London, the Kazakhstan Tourism Association was presented, which after a while was transformed into the Tourism and Sports Agency of the Republic of Kazakhstan.

At this stage, the intensification of tourism activities at the state level begins. The Resolution of the Government of the Republic of Kazakhstan dated December 29, 2000 No. 1947 "On priority measures for the development of the tourism industry" was adopted. This document focuses on such issues as the simplification of visa formalities when entering the Republic of Kazakhstan, the organization by the Agency of the Republic of Kazakhstan for Tourism and Sports of international exhibitions and fairs, the use of incentives for tourists on tariffs for transport services, the formation of a loan program for tourism organizations for 2001 -2005 years. Almost the first steps outlined by this decree were taken in 2002, and from 25 to 27 April in the city of Almaty the second Kazakhstan International Tourism Fair "Tourism and Travel" - KITF was organized, in which about 80 tourist organizations took part. The outlined processes are associated with the international tourism market, the intensification of the activities of all structures of the tourism sector was noted, in particular, participation in the International Tourism Exchanges in the cities of Berlin and London, Moscow, Tashkent International Exhibitions and at the International Tourism Forum in 2001.

In 2000-2003, an action plan for the formation of the tourist image of Kazakhstan was carried out. As part of the implementation of this plan, with the participation of the Agency of the Republic of Kazakhstan for Tourism and Sports, the Spanish television company "CROMA Television" organized and filmed a documentary video about the history, culture and customs of the country "Kazakhstan: a journey to the heart of Eurasia". The documentary film consists of 4 parts characterizing the picturesque places of the republic, infrastructure, historical sites, folk art, traditions and customs. It was broadcast on the European Plus channel. The premiere screening of the documentary film "Kazakhstan: a journey into the

heart of Eurasia" was held at the Embassy of the Republic of Kazakhstan in the Kingdom of Spain with the participation of the President of the Republic of Kazakhstan N.A. Nazarbayev. In addition, CROMA Television, commissioned by the Agency of the Republic of Kazakhstan for Tourism and Sports, produced an advertising video about the tourism opportunities in Kazakhstan.

In the tourist activity of Kazakhstan, there has been a tendency of integration into the world tourist market. Integration processes on the section of the Great Silk Road are especially strengthening in terms of tourism development. For this reason, the Agency for Tourism and Sports of the Republic of Kazakhstan has developed the State Program "Revival of the Historical Centers of the Silk Road, Preservation and Continuous Development of the Cultural Heritage of Turkic-Speaking States, Creation of Tourism Infrastructure". Based on this program, in April 2002 in the city of Turkestan, a regional seminar was organized on the theme "Development of tourism on the Kazakh section of the Great Silk Road". The seminar assessed the state of development of this tourist complex. Among the positive aspects, one can note such as the restoration of cultural and historical sites, the construction of a hotel and a guest house, the reconstruction and construction of roads, the development of new routes by such tour operators as OJSC "Akmola-tourist", as well as the search for investors and the development of investment projects, part of which were submitted for consideration during the investment summit "Eurasia - 2000". At the same time, negative aspects were also noted, among which the following can be distinguished: the entertainment infrastructure is not fully provided, the difficulty of obtaining a visa and the high cost of visas.

The concept of tourism development in Kazakhstan developed and approved by the government defines the principles, priorities and goals of the tourism industry. Particular attention is paid to the issues of state regulation of the industry, the development of tourism infrastructure and marketing strategy, the formation of the tourist image of Kazakhstan, ensuring the safety of tourists, training and scientific support of this field of activity.

On June 13, 2001, the country adopted the Law of the Republic of Kazakhstan No. 211-II "On tourist activities in the Republic of Kazakhstan", which defines the economic, social, organizational foundations of tourist activities in the country. This resolution clearly defines the category and conceptual apparatus in the field of tourism, discloses the main terms and concepts used in the field of tourism, delineates the areas of activity of state and

local authorities, defines the principles and features of licensing of tourism activities in Kazakhstan. The resolution also addresses issues related to contractual relations, professional training of specialists in this industry, the rights and obligations of tourists, insurance in the implementation of tourist activities.

At the third stage of tourism development, the licensing system for tourism activities in the Republic of Kazakhstan was also revised, since on September 14, 2001, the Rules for Licensing Tourism Activities in the Republic of Kazakhstan were adopted, according to this provision, the licensing system was more stringent and it became much more difficult for a tourism company to obtain a license.

By the Decree of the Government of the Republic of Kazakhstan dated December 29, 2002 No. 1445, the Program for the Development of the Tourism Industry for 2003-2005 was approved. In the developed program, a specific action plan was presented, aimed at state regulation and support of tourist activities. All the issues under consideration can be grouped as follows:

- improving the quality of services for tourists through the development of standards in the field of tourism;
- development of tourism infrastructure with the attraction of foreign investment;
- professional development of personnel for tourism workers;
- improving the medical system and ensuring safety in tourism;
- improvement of statistics and accounting of indicators of the tourism industry;
- ensuring a positive image through active participation in international fairs, exhibitions and exchanges, the creation of booklets and brochures about tourist resources of Kazakhstan;
- ensuring environmental protection and environmental balance.

In the presented program, the executors, deadlines and funding sources for this program are clearly defined. The implementation of this document as a whole will allow not only to improve the activities of the industry, but also to coordinate the activities of individual structures related to tourism.

Another important impetus for the development of the tourism industry was the recognition of the tourism industry as one of the priority sectors of the economy among seven cluster initiatives. As part of the development of the tourism cluster in the republic, priority directions for the development of tourism were identified, such as business, ecological, cultural and educational, as well as extreme types of tourism.

Based on this, by the Resolution of the Government of the Republic of Kazakhstan dated June 25, 2005 No. 633 "On approval of plans for the creation and development of pilot clusters in priority sectors of the economy", a plan was approved for the creation and development of a pilot cluster "Tourism" in the city of Almaty and the Almaty region.

Considering the importance of creating a tourism cluster, in 2005 the Government of the republic allocated funds in the amount of 65 million tenge (429,980 USD) to conduct marketing research of the tourism potential of the regions of Kazakhstan in order to determine a further strategy for the development of the tourism industry. To carry out these studies, the company "IPK International" was involved, which occupies a leading position in the development of strategies and the promotion of tourism products on the world market of tourism services.

Based on the results of the research, recommendations were developed on a strategy for the development of the country's tourism industry, taking into account the competitive advantages of Kazakhstan and cluster initiatives for the long term, a number of projects are envisaged, one of which is the development of the State Program for the Development of Tourism in the Republic of Kazakhstan for 2007-2011.

As part of the implementation of the above Plan for the creation and development of the pilot cluster "Tourism", the following work was carried out:

- the tourism industry is included in the list of priority types of economic activities approved by the Government of the Republic of Kazakhstan dated September 17, 2005 No. 925, which provides potential investors with the opportunity to use benefits and preferences provided for by the legislation of the Republic of Kazakhstan on investments;

- at the meeting of the Kazakh-Russian intergovernmental commission (October 18-19, 2005), measures for the development of domestic and inbound tourism at the Baikonur cosmodrome were included in the protocol decision;

- with the support of the World Tourism Organization and the national tourism administrations of the member countries of the World Tourism Organization for Europe Commission, on April 25-27, 2006, the 45th meeting of the World Tourism Organization under the European Commission on sustainable tourism development was held in Almaty;

- at the XVI meeting of the General Assembly of the World Tourism Organization, held from November 25 to December 2, 2005 in the city of Dakar (Senegal), the issue of Kazakhstan's nomination to the Executive Council of the World Tourism Organization in 2007 was introduced;

- By order of the Minister of Industry and Trade of the Republic of Kazakhstan dated June 20, 2005 No. 220, the expert council on tourism was approved under the authorized body in the field of tourism.

At the last stage, it is possible to differentiate the development of tourism at the enterprise level, depending on its dimension. Large enterprises that use a differentiation strategy as their basis have a fairly wide range of services offered, a diverse travel geography and offer different countries and regions, thereby insuring themselves against possible failures and economic risks. The results of the polls conducted by the author among large tour operators showed that the main problem in their activities is obtaining entry visas to a number of states, in particular to America, France and other Schengen countries. The main problem of small travel companies is the lack and limited financial resources, which negatively affects their activities.

In general, the analysis of tourism activities in Kazakhstan made it possible to systematize and present the specifics and features of tourism development at each stage.

Based on the above analysis, we can conclude that the most active in terms of reforming the legislation on tourism in Kazakhstan were the first and third stages, and in economic terms, the greatest rise in indicators is observed in the second period. If we consider the issues of the political aspect, then we can state the fact that the decisive was the first and third periods, which opened up opportunities for the development of international tourism. If initially social factors were not so important for tourist activity, then later we observe that they began to be given some attention (Smykova, 2006 pp. 14-16).

The development of the economy of Kazakhstan, the implementation of a set of measures for the industrial and innovative development of the country contribute to the

active attraction of foreign capital. Therefore, there are all the prerequisites for attracting foreign and domestic investment in the development of the tourism industry, the formation of a high level of tourism management in order to ensure a clear coordination of actions of central and regional levels of government, to promote the development of private initiatives; creating an information space for the industry, developing an effective system for promoting Kazakhstani tourism products to foreign and domestic markets; adoption of the necessary regulatory legal acts on investment and taxation. These are the main directions of cluster development of tourism, planned for implementation within the framework of the developed regional master plans.

Thus, over the years of state independence of Kazakhstan, a number of important events have been carried out to form the national tourism industry of the republic, 22 international agreements have been concluded in the field of cooperation in the field of tourism, which have a huge potential for social efficiency.

Chapter 2. Problems and perspectives of tourism development

Kazakhstan is the ninth largest country in the world, which has everything - from snow and glaciers to sand dunes and mountain peaks. It is unique for its range of natural landscapes, which are distinguished by an amazing variety, inexhaustible opportunities for active recreation.

There are so many amazing places in Kazakhstan that it is hardly possible to “master” them even in a few vacation seasons. You can "roam" all your life. For example, go with archaeological expeditions to explore the Bronze Age or the Early Iron Age. And then visit the monuments of modern history, such as the launch sites of Baikonur. Afterwards, examine the underground mosques and chalk mountains in the Atyrau region, the mausoleums of the eastern rulers, feel the spiritual connection in the sacred resting place of Korkyt-ata for all Turks, make a pilgrimage to the mausoleum of Ahmed Iassau. You can compare your feelings, going down to deep canyons and climbing mountain peaks, to meet hereditary shepherds and artisans, whose life has not changed for centuries. Those who wish to taste the romance of the past can ride horses or camels and travel through the mountains, deserts and steppes.

However, this powerful potential is almost not in demand by the tourist business. International tourism in Kazakhstan is going through hard times. Prior to Kazakhstan's independence, tourism, like all other sectors of the economy, was strictly regulated by the center. The main regions of tourist activity in the USSR were the Caucasus, Crimea, the Baltic states, the historical centers of Russia and Central Asia. At the same time, the historical significance of a number of architectural, archaeological, cultural monuments and natural attractions of Kazakhstan was actually not advertised and remained unclaimed. Tourism in Kazakhstan during the Soviet period was one of the elements of the system of cultural and educational work that performed an ideological function and, despite its dominant role, was financed on a leftover basis and did not have significant economic significance. After gaining independence, Kazakhstan had the opportunity to significantly develop the tourism industry. A big step towards the development of international relations in the field of tourism was the entry of Kazakhstan in 1993 as a full member of the World Tourism Organization.

Kazakhstan has a huge potential, both for the development of domestic tourism and for receiving foreign travelers. It has everything you need - a huge territory, rich historical and cultural heritage, and in some regions - untouched, wild nature.

Inbound and domestic tourism in Kazakhstan is represented by a wide variety of its types. The most actively developing ecological, active, extreme, historical and educational types of tourism. Business tourism is also gaining momentum. Let's pay attention to inbound tourism in Kazakhstan. It can be seen that from 2015 to 2018 the share of tourists arriving from the CIS countries continued to increase steadily. Only in 2019 there was a noticeable decrease in the tourist flow from the CIS, which is associated with the global economic crisis, which negatively affected tourism around the world (Table 1).

Table 1 . Entry of foreign citizens to the Republic of Kazakhstan

Types of directions	Incoming non-resident visitors served (people)				
	2015	2016	2017	2018	2019
Inbound tourism	219 634	261 164	330 817	548 313	543 022
CIS	84 121	96 421	111 737	175 766	150 270
Non-CIS countries	135 513	164 743	219 080	372 547	392 752

Source : Vakhitova D. Development of tourist infrastructure in the regions // Expert Kazakhstan. – 2018

An increasing share in the structure of inbound tourism is made by tourists from non-CIS countries, the number of which has almost tripled from 2015 to 2019.

In 2019, among the total number of non-resident visitors who used the services of tourist organizations (37,937 people), the share of tourists from the CIS countries was about 15%, from non-CIS countries - about 85%. The average number of days of stay of tourists from the CIS countries is 4-5 days, from non-CIS countries - 17 days.

Analysis of the incoming flow of tourists by purpose of stay showed that 72.5% of non-residents arrive in Kazakhstan for business and professional purposes, and only 20% of tourists indicated that they arrived in Kazakhstan for the purpose of rest and recreation.

According to statistics, one foreign tourist leaves an average of \$ 700 in the republic during his stay.

From 2015 to 2018, the number of residents of Kazakhstan traveling abroad on tourist vouchers has been constantly increasing, and only in 2019 there was a slight decline. The growth of outbound tourism was mainly due to the increase in the number of tourists traveling abroad for the purpose of recreation and recreation, and this segment of outbound tourism showed growth in 2019, when all other types of outbound tourism showed negative dynamics. A characteristic feature of outbound tourism during this period is the decrease in the number of shop tourists and tourists traveling for business and professional purposes (Table 2).

Table 2 . Departure of citizens of Kazakhstan abroad

Types of directions	Incoming non-resident visitors served (people)				
	2015	2016	2017	2018	2019
Inbound tourism	154 885	210 692	255 626	286 691	261 070
CIS	17 219	31 263	28 191	24 820	20 977
Non-CIS countries	137 666	179 429	227 435	261 871	240 093

Source : Malienko M.S. Problems of personnel training for the hospitality industry // Bulletin of KAFU. – 2016

In total, in 2019, tourists from the Republic of Kazakhstan visited more than 100 countries of the world. At the same time, the bulk of resident tourists from the CIS countries went to Kyrgyzstan and Russia. Turkey, Germany, China, the United Arab Emirates, Thailand, Egypt are the most popular among the residents of Kazakhstan among the countries of the far abroad.

The number of days of stay of Kazakhstani tourists in the CIS countries is on average 6 days, in non-CIS countries - 7 days. At the same time, the goals of departure are leisure and recreation (67.3%), business and professional goals (8.1%).

According to the data in Table 5, the highest growth rates of domestic tourism were observed in 2016-2017. In subsequent years, this figure dropped significantly. And in 2019, the indicator of domestic tourism was generally less than in 2016.

Table 3 . Indicators of domestic tourism in Kazakhstan

Types of directions	Incoming non-resident visitors served (people)				
	2015	2016	2017	2018	2019
Domestic tourism	106 486	184 379	209 143	193 122	174 940

Source : Tourism of Kazakhstan 2014-2018 // Statistical collecton. – Astana, 2019

Thus, outbound tourism in Kazakhstan significantly exceeds inbound and domestic tourism, and, unfortunately, there is a significant upward trend in this indicator. The share of inbound tourism is much smaller, but not subject to such sharp fluctuations. The practice of developing world tourism shows that all states are primarily interested in the development of inbound and domestic tourism, since the first type provides foreign exchange earnings to the state treasury, and the second accumulates funds within the state and contributes to the development of tourism infrastructure.

According to the Agency of the Republic of Kazakhstan on statistics, 1163 tourist organizations were engaged in tourism activities in 2019, they served 473,947 tourists. These indicators in the service of tourists show a decrease in the number of tourists served by tourist firms compared to 2017 (520,972 tourists served) and 2018 (541,930 tourists).

The decrease in the number of tourists in 2019 is primarily due to a decrease, compared to last year, in the number of arrivals by 40% and departures by 10%, as well as a decrease in the number of people served by domestic tourism. The decrease in the number of all categories of tourists is primarily due to the global economic crisis, which generally negatively affected the state of the tourism industry around the world, and Kazakhstan is no exception.

At the same time, the number of visits from non-CIS countries has increased. In 2019, it accounted for 85% of the total number of arrivals.

The bulk of tourists arrived in the republic from Germany (4,251 people), China (3,749 people), the USA (2,205 people), Italy (2,039 people), Great Britain (1,889 people). The upward trend in outbound tourism continues. Its volume increased by 1.7 times or by 106,185 people in comparison with 2015, i.e. in 2019 the number of those who left was 261,070 people, and in 2015 - 154,885 people.

Outbound tourism is inherent in the activities of tourism organizations in all regions. The average number of days of residence in non-CIS countries in 2019 was 3 - 4 days. The most visited Kazakhstani tourists are still Turkey (101,528 people or 38.8%), China (39,805 people or 15.2%), the UAE (24,746 people or 9.4%), Egypt (14,629 people or 5.6%), Thailand (13,131 people or 5.02%).

The number of domestic tourists in 2009 decreased by 1.4 times and amounted to 122 16 people (in 2019, 174,940 people). In most regions, there has been an increase in the number of domestic tourism tourists. The growth of this indicator took place only in Akmola, Atyrau, Kostanay and Karaganda regions. A particularly sharp decline in the share of domestic tourism occurred in the East Kazakhstan region. If in 2019 52014 tourists were served on the internal routes of this region, then in 2009 only 17446 tourists.

The income of tourist organizations from their activities is primarily due to the growth in indicators of all types of tourism.

The largest income was received by tourist organizations in Astana and Almaty, East Kazakhstan, Karaganda, Mangystau, Almaty, Atyrau and Pavlodar regions. Income from the sale of works and services in the field of tourism in 2019 compared to last year increased by 11% and amounted to 65726.6 million tenge. Income from the activities of travel agencies for 2019 by type of tourism amounted to 11802.4 thousand tenge.

In 2019, 10289.8 million tenge were transferred to the state budget from the total income generated in the tourism sector in the form of taxes and fees. The largest income (8558.5 million tenge) the Republic of Kazakhstan receives from the activities of accommodation facilities, tourist organizations directly transferred taxes and other mandatory payments to the state treasury in the amount of 757.1 million tenge, and sanatorium organizations transferred 974.2 million tenge.

There are two basic components of the Kazakh tourist product: cultural tourism on the Silk Road (pilgrimage and traditional) and eco-adventure tourism closely related to it

(safari, rafting, bird watching, trekking, mountaineering, hunting, fishing). In this regard, the regions that have resources for eco-adventure tourism, through which the Silk Road route runs, should be highlighted: Almaty, Zhambyl, South Kazakhstan, East Kazakhstan, Akmola regions.

Kazakhstan has certain prospects in the segment of business tourism. These are primarily the cities of Almaty, Astana, Atyrau. Geopolitical location and natural resources allow counting on an increase in the number of business tourists coming to Kazakhstan on business issues and participation in international conventions. The infrastructure of the above centers is generally in line with international standards.

The city of Almaty is a strategic (air, road, rail) gateway for the republic and the main migration takes place precisely through this city. In addition to buildings and hotels convenient for holding various forums, the city has everything you need for recreation and entertainment, in addition, wonderful recreational areas are located in the territory of the nearby city within a radius of 500 km.

Astana city becomes the same strategic zone. The ever-growing interest in the city as the young capital of our state with a modern look and infrastructure will serve the rapid development of international and domestic tourism in the city.

If we consider the dynamics of tourism development in Kazakhstan, it can be noted that the tourist activity of citizens of Kazakhstan in 2019 increased in comparison with 2015 by more than one and a half times, and indicators for inbound tourism for the period from 2015 to 2018 increased by 2 times ... However, in 2019 there is a sharp drop in the rates of reception of foreign tourists and compared to 2018, the decrease was almost 2 times, that is, the rates of reception of foreign tourists in 2019 approached those of 2015.

The presented data are an alarming symptom for the industry, since outbound tourism has received the greatest development over the years. Inbound tourism also showed positive growth dynamics, but as a result of the economic crisis, it dropped sharply and almost returned to the indicators of the early 2000s.

Outbound tourism against the background of the instability of the world economy showed only a slight weakening of growth. Separately, one cannot fail to note the dynamics of the development of domestic tourism in the Republic of Kazakhstan.

The development of tourism is impossible without stimulating domestic tourism, since it is the most accessible and cheapest. The structure of domestic tourism has changed in recent years, so weekend routes and short-term excursion trips have become popular (Table 4).

Table 4 . Dynamics of indicators for tourism in the Republic of Kazakhstan

Indicators	Years				
	2015	2016	2017	2018	2019
Tourists served in total, people	292 738	434 943	520 972	541 930	473 947
Sent tourists, man	154 885	210 692	255 626	286 691	261 070
Accepted by tourists, man	31 367	39 872	56 203	62 117	37 937
Tours sold	143 548	125 533	134 694	229 251	187 723

Source : Arkhipova V.F., Levizov A.S. On infrastructure as a determining factor in the development of tourism in the region // Vestnik VISU. – 2015

All over the world, the profitability of the development of inbound tourism is clearly expressed for the state, giving additional income in the form of foreign currency.

For Kazakhstan, tourism could be one of the stimuli for economic development if the tourism sector is developed to receive foreign tourists in its country. Specialization in inbound tourism will provide an opportunity to create additional jobs, expand the export potential of the market for goods and souvenirs, and become one of the sources of foreign exchange earnings.

Kazakhstan is rich in tourist resources. The natural and recreational potential of Kazakhstan, as well as national traditions and characteristics, mentality, customs are attractive for foreign tourists, since they have already been saturated with the offered tourist services in the markets of Europe and Asia. In general, the level of tourism development in Kazakhstan does not correspond to the international one. First of all, the tourism industry is

focused on the development of outbound tourism; due attention is not paid to the development of inbound and domestic tourism.

It is well known that the development of inbound tourism is important for the country. This is due to the fact that inbound tourism has a number of advantages from an economic point of view, including:

- receipt of funds in the country in the form of foreign currency through the sale of vouchers and through the purchase of services and goods in the country of visit;
- development of the hotel sector in the country;
- formation of a developed tourism infrastructure;
- development of industries related to tourism;
- creation of additional jobs;
- conducting full-scale sociological and marketing research to create the necessary tourist product.

The refusal of tourist firms from entrepreneurship in the field of inbound tourism is explained by the lack of the necessary financial resources and appropriate infrastructure.

In Kazakhstan, at present, one of the problems that hinder the development of international tourism is the lack of a wide range of animation events. For their creation, it is necessary to train specialists abroad, due to the lack of experience in this field of activity.

Kazakhstan is rich in tourist and recreational resources, it should be especially noted the presence of attractive mountain, recreational, natural, water, excursion zones. This base creates conditions for the unimpeded development of inbound tourism.

In Kazakhstan, tourism is a developing industry, and the impact of the tourism industry on the country's economy is still insignificant. The underdevelopment of the tourist infrastructure, low quality of service, the persistent myth about Kazakhstan as a country of increased risk have led to the fact that at present our country accounts for less than 1% of the world tourist flow.

The indicator of tourist mobility of the population of Kazakhstan is one of the lowest in the world. The overwhelming majority of travel agencies prefer to direct their compatriots

abroad, and only a few companies work to attract tourists to Kazakhstan. Moreover, mainly tourists visit Almaty and Astana.

Tourism is a separate industry that does not mobilize foreign exchange earnings into the Republic, but, on the contrary, a channel for the drain of currency in impressive amounts. Perhaps an avalanche of offers for rest abroad was in demand in Kazakhstan, because there our tourists were offered a higher quality service for reasonable prices. Often there is a situation when it is cheaper for a domestic tourist to rest abroad than in Kazakhstan.

Analyzing the state of tourism in Kazakhstan at the present stage, it is necessary, first of all, to note the positive dynamics of its development. Despite small adjustments introduced by the global economic crisis, the growth rate of tourism in Kazakhstan continues to show positive dynamics.

It should be noted that the rate of outbound tourism development is more dynamic than domestic and inbound tourism. This is due to the rising standard of living of the population of our country and the lack of competitive tourist offers within the country, which would combine price and quality indicators.

Inbound and domestic tourism are the most beneficial for the state, since during their development there is an inflow of money into the country, thereby replenishing its budget.

Thus, stating the facts of the state of tourism in Kazakhstan at the present stage, it should be noted the need to pay special attention to the development of domestic and inbound tourism.

We will conduct a SWOT analysis of tourism in Kazakhstan.

In recent years, rail transport has been a popular means of transportation among the bulk of the republic's population due to more affordable ticket prices.

The tourist potential of Kazakhstan is rich and diverse and has unique opportunities for the development of almost all types of tourism, from educational tourism associated with visiting cultural and historical sites to adventure and other active types of tourism, ecotourism. There are about 100 water clinics in the country, more than 9000 archaeological and historical monuments. Hunting and fishing are popular among tourists, including national types of hunting.

Currently, tourism in the Republic of Kazakhstan has been declared a priority area, in connection with which the state plans to create conditions for the formation of a highly efficient and competitive tourism industry, in order to ensure its further integration into the structure of the world tourism market and deepen international cooperation in the field of tourism.

Given that Kazakhstan has a unique natural potential, the country has all the opportunities for the development of various types of tourism: cultural, educational, environmental, extreme, business, health and others.

As international experts in the field of tourism note, the state of development of the tourism industry in Kazakhstan in recent years is characterized by its progressive and sustainable development.

Table 5 . SWOT analysis of tourism in Kazakhstan

<p>Strengths:</p> <p>Availability of tourism industry infrastructure.</p> <p>Legislative and regulatory framework for the development of the tourism industry.</p> <p>High interest in ecotourism on the international market (8.9 million people or 63% of the total potential), for the development of which Kazakhstan has the potential:</p> <ul style="list-style-type: none"> - the Information Resource Center of Ecological Tourism operates in Almaty; - guest houses are being created. <p>The unique culture and history of Kazakhstan allows the development of cultural and educational tourism.</p> <p>Natural conditions for the development of ski tourism.</p> <p>Provision of human resources.</p> <p>Rapid economic growth in Kazakhstan (annual increase in GDP, respectively, the purchasing power of the population.</p> <p>Political stability in Kazakhstan.</p> <p>Having the best cosmodrome in the world</p>	<p>Weak sides:</p> <p>Almost all infrastructure is located in cities and large settlements.</p> <p>Infrastructure non-compliance with international requirements.</p> <p>There are no conditions for a multi-day stay of tourists at sites of interest.</p> <p>Lack of a mechanism for subsidies, preferences and tax incentives for investors.</p> <p>The approaches and policies of ecotourism in Kazakhstan have not been formed.</p> <p>Poor quality / lack of access roads to tourist sites.</p> <p>The training program does not correspond to the real needs of the market.</p>
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<p>Capabilities:</p> <p>Creation of new jobs, including in rural areas.</p> <p>A high level of recognition of Kazakhstan in the international market of tourist services, which will provide an inflow of investments and income to the budget.</p> <p>Creation of a national tourist product.</p> <p>Increase in tourist flows for inbound and domestic tourism</p>	<p>Limitations:</p> <p>Increase in the number of one-day routes.</p> <p>Decrease in the volume of tourist flows.</p> <p>Low level of investment activity.</p> <p>Formation of the image of Kazakhstan as a country unfavorable for tourism, as well as a decrease in its investment attractiveness.</p>
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Source : Harvard Business Review. Stress-Test Your Strategy: The 7 Questions to Ask, by Robert Simons, November 2010

The competitive advantage of Kazakhstan in comparison with other countries in which only cultural values dominate is that the Kazakh part of the Silk Road is also represented by combined tours in combination with unique natural landscapes, endemic flora and fauna, monuments of the historical and cultural heritage of nomads and the culture of ancient peoples cities.

The image reality of Kazakhstan in the field of tourism should act as a territorial resource and a source of competitive advantages. In this case, it is fundamentally important to realize that with this understanding, the center of the country's competitiveness is not so much the competitiveness of products as the country itself as a certain "symbolic value". Getting into the information environment, under the influence of information and communication technologies, such "symbolic value" becomes part of the state's image and acquires a very real estimated value.

In the beginning, such models of competitiveness were established in the business sphere, where the positive image of a particular company turned into a source of huge additional profits.

However, the post-industrial level of development of society has led to an increase in information-symbolic components in all spheres of social and political life. This is also reflected in the unlimited exports of the world economy (almost everything is exported: education, medicine, justice, culture, traditions, lifestyle, etc.).

This fully applies to the tourist region as a unit of symbolic consumption by world public opinion. Thus, the presence of the country's tourist image in the global information space is becoming one of the key components of the state's competitiveness.

The world practice of country imaging in tourism demonstrates its economic and political efficiency. First of all, this creates opportunities for the formation of the country's competitiveness in the field of tourism and support of national business.

The creation of a positive tourist image of the country can pursue different goals. Some regions are just taking the path of creating their positive image, while others need only small efforts to popularize their cultural (in a broad sense) potential as a valuable asset and an important component of maintaining their competitive advantages.

One way or another, but the key link in the country's image in general is its tourist attractiveness. It immanently presupposes a number of components that determine the high competitiveness of the region (for example, a high level of security, service, developed infrastructure, pronounced cultural heritage, etc.).

When starting to create a tourist image of the country, one should adhere to certain methodological principles. So, among such principles it is worth highlighting the following:

1. The tourist image reflects not only natural or historical and cultural monuments, it is also formed within a certain social group, which, as a result of the image, spreads its influence.
2. In other words, the country's image largely depends on its perception by its own citizens. That is why the image of the state must be specific, widespread and understandable.
3. The tourist image of a country largely depends on what material and spiritual values it exports.
4. With all the diversity of the country's characteristics, which significantly complicates the imaging process, each state has its own core (nuclear) or basic image. It is the basis that provides the image representation of the country. Provided that such a basic image is successfully defined, it provides for further separation and production of secondary and supporting images.

5. The process of creating the image must be active and focused. This allows the actualization of desirable and important for the perception of the target audience differences of the state and "obscuring" such characteristics of it that have a negative connotation.

6. The central place in the country's tourist image in the context of globalization should be occupied by symbols that are responsible for its individualization and uniqueness. In this case, the main task will be to translate individual regional symbols into the language of generally accepted meanings in order to make the image understandable for the target audience.

7. An important methodological imperative of the country's tourist image should be the romantic and heroic intentions of its past and present. The region should be proud of its achievements in various spheres of life.

Based on the foregoing, we can conclude that the contribution of the tourist image of the state to the formation of its competitiveness is determined by its property to activate the internal potential of the territory, not only material, but also cultural. Convert it into an important reputational resource that ensures the overall perception of the country and its competitiveness in the long term.

UNWTO data show that for the additional attraction of one foreign tourist, providing an average of 1000 euros in the country's economy, states spend from 3 to 10 euros on non-commercial advertising of a tourist product. In accordance with this, the average budgetary funds allocated in European countries for the promotion of a tourism product is 31.7 million euros.

Unfortunately, in Kazakhstan, no studies have been conducted on the size of budgetary funding to attract one foreign tourist. Therefore, the insignificant measures taken by our country to promote the national tourist product can only marginally change the parameters of the existing tourist flow.

Creation of the image of Kazakhstan as a tourist center with unique potential, open to the whole world, safe for tourists is one of the main factors in attracting them to the country. Only a broad image non-commercial advertising campaign of tourism opportunities in Kazakhstan, focused on the key directions of external and internal tourism markets and having a stable character, will make it possible to make inbound and domestic tourism a profitable component of the entire tourism sector of our country rich in tourism resources.

Particular attention should be paid to the comprehensive promotion of Kazakhstani tourism in the CIS countries, to promote not only the revival of traditional tourist routes, but also the presentation of new tourist products.

Thus, the task of the state is to promote the Kazakh tourism product in the domestic and world markets. Private business cannot conduct a non-commercial image advertising campaign for the entire country, since it promotes and sells only its own product, and creating the image of Kazakhstan as a country favorable for tourism is an exclusively state task. This is confirmed by world practice.

Chapter 3. Coronavirus influence on tourism

The current economic crisis in tourism has arisen due to the global spread of the "coronavirus - COVID-19" pandemic, restrictions and prohibitions on travel of citizens to other countries, and even within the territory within countries due to the threat of the spread of the "coronavirus" pandemic. An economic crisis is a sharp deterioration in the economic state of the country, manifested in a significant decline in production, disruption of existing production ties, bankruptcy of enterprises, growth in unemployment, and, as a result, in a decrease in the standard of living and welfare of the population.

The degree of development, duration, and parameters of the crisis are not clear, since it is just beginning, but it is clear that this situation will somehow affect each of us. The question is how we perceive this crisis. Obviously, the real losses from what is happening now are simply impossible to assess, since it is not known when everything will end.

The World Travel and Tourism Council said that up to 75 million jobs are under threat, and the losses of the tourism business will exceed 2 trillion. In the whole world, the number of travels in 2020 may decrease by 25%, which threatens to reduce 12-14% of jobs in the travel industry around the world.

Over the past 20 years, this is the worst blow to the tourism industry, and the losses of travel companies can be colossal.

In this regard, the relevance of the topic of assessing the effectiveness of tourism during the crisis is beyond doubt. Only by comprehensively analyzing the situation, it is possible to determine the current state of the tourism industry at the present time, to give objective forecasts for the future.

The impact of the COVID-19 virus is one of the toughest challenges for the global travel industry in decades and is notable for its unpredictability, affecting almost every type of travel industry.

Tourism is extremely mobile and easily responds to all kinds of threats. In this regard, it is the travel industry, among other sectors of the non-production sphere of the economy, that is more susceptible to negative external factors.

Today, the number of tourists is declining not only because of the "coronavirus". Oil prices, currency fluctuations, psychological fear of travel - all this, one way or another, will seriously affect the tourism industry.

In this crisis, the segment of potential tourists will suffer the most. In general, the situation now looks like this: more than 3 billion people around the world are sitting at home and are afraid of infections, borders are closed, visa-free regimes have been canceled, planes do not fly, hotels are empty, and employees are left without work. Experts are confident that the tourism sector will be lost this year. Many companies will disappear as well as the habits of tourists.

Coping with the crisis will not be as pleasant as many people think. Yes, it will be the joy of traveling, but not the joy of interacting with other people - it will take some time.

Tourist flows "just collapsed", in this situation they cannot be redistributed in other directions. According to optimists, the tourism industry may revive in the third or fourth quarter of 2021, but this is in the short term.

In the long term, economic paralysis will affect the entire world. The economic collapse will make tourism take longer than usual to recover. According to analysts, it is possible that recovery due to the unequal situation with the virus in different countries will take several years.

The experience of past crises shows that the number of tourists in the world after the pandemic will grow very quickly, but the financial indicators of the industry will not. The profitability of the tourism industry will decline. According to analysts, only those travel companies and tour operators will survive that could have accumulated a sufficient "safety cushion" in the previous period.

It is obvious that the "coronavirus" pandemic will completely change the tourism sector: in the medium term, people are less likely to go abroad and prefer domestic tourism, and all experts say that after a long and exhausting sitting in apartments, tourists will immediately want to go on travel as soon as they will have such an opportunity. By the time the borders open, the industry will have a huge pent-up demand. The purchasing power of tourists will decrease due to the crisis. Perhaps international tourism will become the lot of the rich, whose well-being cannot be affected by the pandemic.

Due to economic problems, the demand for the cheapest tours can increase - people will save money, choose the most affordable destinations, and also reduce travel time. At the same time, due to the fear of large concentrations, the popularity of ecological routes, forest hikes, outings and other similar types of recreation will grow among people.

By the way, research confirms that tourism as a special service sector is rapidly dying out, but never completely destroyed. Moreover, it is also rapidly reviving, and in more accessible forms and moving from rich countries to poor ones.

The travel business in the world, under the current circumstances, will simply go to the bottom, giving way to exclusively independent tourism. Mass tourism will become more individual, people will more actively book their travels online, build them like from construction blocks. The popularity of organized package tourism is likely to continue to decline, aided by concerns about the safety of large hotels. At the same time, people will not stop traveling, tourism and hospitality services will be in demand. The market will go to those who have the strength to hold out and get out of the crisis even stronger and more renewed. Humanity has experienced epidemics and more terrible, and with a much more modest arsenal of means to fight them.

It is no secret that as a result of the current crisis, small travel companies are under attack. In this situation, the government needs to think, first of all, about measures to support medium and small companies, but this does not mean that they will go bankrupt: they are more flexible, it is easier for them to reduce the amount of working time. Large companies have large cost items for rent, wages, IT, etc.

The main problem of the tourism industry is that due to the imperfection of the legislation on tourism activities, even in spite of objective force majeure circumstances, travel companies are obliged by law to return 100% of the cost of paid services. At the same

time, the travel companies themselves suffer losses and do not receive a return on their investment.

It should also be borne in mind that during the crisis period most banks refuse to lend to those sectors of the economy that are low profitable and risky. For this reason, some players may leave the tourism market, but in business there are always such risks, the closure of companies was, is and will be. Bankruptcies can be triggered by various reasons; to solve the existing problems, programs are needed to subsidize inbound and domestic tourism, such as subsidizing domestic Kazakhstani charter flights, the introduction of an electronic visa.

The tourist business in Kazakhstan found itself in a particularly difficult situation after the introduction of the emergency regime on March 16, 2020. For more than seven months, the entire tourism market has been in complete stagnation.

Travel companies are sending workers en masse on unpaid vacations. Considering that before the pandemic there were about 5 thousand companies operating in the tourism market of Kazakhstan, then according to the most conservative estimates, 10-30 thousand people may lose their jobs.

Not so long ago, a resolution was adopted, according to which, in 2020, travel companies will be exempted from paying property tax for legal entities and individual entrepreneurs. But representatives of the travel industry are asking to exempt the industry from paying all taxes, at least temporarily until the emergency regime is lifted.

Also, at the state level, support for charter carriers is required, which could include a package of measures such as setting preferential prices for aviation fuel, reducing prices for servicing aircraft at the country's airports. So it would be possible to increase the demand for tours by reducing the cost of air tickets during the crisis.

It should be noted that large travel agencies in Kazakhstan (such as Hot Tours) have prepared, together with the Kazakhstan Tourism Association, relevant proposals to the government to support the tourism industry in Kazakhstan. Most of the representatives of the tourism business believe that the state understands and hears them and hope to receive soft loans to replenish working capital and targeted subsidies.

Speaking about the prospects for the development of the tourism industry in Kazakhstan, most likely, it will undergo a significant transformation in its content. Given

the flexibility and mobility of the tourism business, it will live, but to support it, regular, working measures of state support are needed, a number of which have already been adopted by the Kazakh government.

Obviously, there will be changes in the line of tourism products related to the crisis of foreign tourism, which can last from several months to 2-3 years. Therefore, the growth of domestic tourism is predicted, and in such forms as: individual tourism, active forms of tourism (kayaks, rafting, mountain trekking, etc.), bus tours, as well as accommodation in glamping sites.

In conclusion, I would like to note the fact that it is the current crisis that has revealed many systemic problems of the tourism business, which were previously hidden. Therefore, regardless of the timing of isolation and panic, the tourism market will change, and only those companies and tour operators who are ready for such changes will survive on it.

Conclusion

Tourism today occupies one of the most important positions in the world economy. The systematic solution of the problems of increasing the attractiveness of the regions of the republic for tourists, the development and implementation of additional programs for the development of tourism in the regions, their timely financing and the modernization of the existing infrastructure will significantly increase the attractiveness of all tourist regions of Kazakhstan in the future.

The Republic of Kazakhstan has objective prerequisites for active integration into the world tourism market. During the years of state independence, a number of important events have been carried out in the country: joining the World Tourism Organization in 1993, introducing a certification and licensing system, which have become a kind of mechanism for controlling and monitoring the proper provision of tourist services. During this period, 22 international agreements on cooperation in the field of tourism were concluded, which are socially effective. An important aspect, undoubtedly, is the participation of the Republic of Kazakhstan in international tourism forums and exhibitions, for example, in Berlin, London, Moscow and Tashkent, as well as holding its own annual exhibition "Tourism and Travel" - KIFT. It is also important that in 2005 the Tourism cluster was created as one of the most priority areas in the economy of the state, and IPK International, a leader in the promotion of tourism products on the world market.

The main advantage of Kazakhstan is a variety of natural resources, cultural and historical heritage. At present, if Kazakhstan is known as a tourist country, then only the capital of the republic with its modern architecture, on which famous masters from Europe worked, and the city of Almaty, famous for its extraordinary nature and its ski resorts, are in demand. But in addition to these two cities, the Republic of Kazakhstan is rich in other interesting tourist sites. For example, national parks, nature reserves, UNESCO sites, resort areas on lakes, more than 100 health-improving institutions, more than 9000 archaeological sites and a number of other attractions. Kazakhstan offers almost all types of tourism. As you know, when choosing a country to visit, tourists are attracted by natural landscapes, geographical features, cultural heritage, developed infrastructure and safety. In this regard, Kazakhstan has every opportunity to take its rightful place among countries with a favorable tourist image. In the absence of a spectrum of literature about Kazakhstan, we think that this

work will be especially useful and informative for those who love eastern countries and, possibly, will discover Kazakhstan from a new side.

The main problems of tourism development in the country: poorly developed image of Kazakhstan, lack of qualified personnel in this area, as well as the unsatisfactory state of the transport infrastructure. The President of the Republic of Kazakhstan developed a Concept for the Development of the Tourism Industry until 2020, which provides for ripe problems, and also suggests ways to solve them. Kazakhstan really needs a well-thought-out advertisement, because even the citizens themselves are often not aware of the country's potential. The state policy aimed at creating the image of Kazakhstan, with a serious approach and implementation of the planned measures, will give a positive result very soon. Attracting foreign professionals, such as the Austrian company WIFI International, which provides training programs and interactive training courses, will help to achieve a high level of education for personnel working in the tourism sector. And the participation of the Kazakh International University Nazarbayev University will help to regulate the compliance of curricula at all levels of education.

With a comprehensive solution to all the tasks specified above, undoubtedly, in the coming years, the Republic of Kazakhstan will ensure the creation of a competitive tourism industry capable of business cooperation within the framework of international trade in services in the field of tourism and recreation.

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