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Ways to improve the programs of development tourism in Kazakhstan

The article notes that at present tourism is becoming one of the fastest growing sectors of the economy and the direction of the concept of tourism development in Kazakhstan is also topical. The author determined that the hospitality sector began to provide more jobs. This situation affects many countries for the development of tourism. The article considers the systems of evaluation of the concept of tourism development in Kazakhstan until 2020. The tasks and mission of the concept are explored, which are concentrated in five points: creating a framework for new tourism experience, developing ecotourism, environmental education, creating professional management and regulation that provides easy access to Kazakhstan within the country, promoting global competitive services and travel goods. It is concluded that the development of domestic tourism in Kazakhstan will depend on a number of market trends - in the field of tourism in general, economics, demography, ecology, technology and other factors. Therefore, this strategy will be evaluated in accordance with the framework that will be considered in three groups, such as suitability, acceptability and feasibility. The results of this study show positive changes in the main indicators of international tourism, however, we can conclude that the potential of the Kazakh tourism industry is not fully realized.

Keywords: tourism, development, economy, analyze, destination, management, strategy, sector, provide, framework.

Introduction

In 2013, The Ministry of Industry and New Technologies of the Republic of Kazakhstan published «Concept of tourism development in Kazakhstan till 2020», which is based on cluster concept. This Concept emphasizes five regions which will be developed as world-class tourism clusters: Astana, Almaty, Eastern Kazakhstan, Southern Kazakhstan and Western Kazakhstan [1]. An investigation of the recent condition of the travel and tourism industry in Kazakhstan shows that Eastern Kazakhstan is the leading touristic region with 19.2 % of the total visitors, while, the capital city Astana with 9.7 % become top 4 popular place. Furthermore, analysis shows that Kazakh tourists prefer to spend their holidays outside of the country, which means loss of business for destinations and accommodation facilities in Kazakhstan. In 2013, showed steady rise in the outbound tourism with over 10 million whereas the number of arrivals was around 4,926,000 [2].

Therefore, to increase domestic and foreign visitors the concepts' tasks, aim and mission can be seen as compromised in five points: creation of the framework of new tourist «experience», development of ecotourism, environmental education, creation of a professional management and regulation providing easy access to Kazakhstan and within the country, advancement of globally competitive services and commodities for provincial and overseas travellers.

Discussion and Results

Kazakhstan, with a wealth of tourism and recreational potential is characterized by an insufficient level of development of tourism. In 2013, revenue from tourism activities amounted to 533.2 billion tenge (1 US dollar = 186 tenge), which showed a slight increase to 629.0 billion tenge in 2014. Its contribution in the gross domestic product (GDP) in 2014 was 1.7 %, with the projection to grow to 6.3 % in 2015. In 2014, the number of people directly employed in the industry was 152 000 people, representing 1.8 % of total employment in the country [3].

Suitability. The development of inbound and domestic tourism in Kazakhstan will depend on a number of market trends - in tourism as a whole, the economy, demography, ecology, technology and other factors. Therefore, this strategy will be evaluated according to the framework, which will consider under three groups such as suitability, acceptability and feasibility. The main challenges from external environment will be assessed with C-PEST analysis, which showed advantages of noticing potential threats and responding them.

The economic environment. According to United Nations World Tourism Organization, the main long-term trends of tourism development are stable and forecast for international arrivals increase by 3.8 % per year between 2010 and 2020, which provides a generally positive market basis for the development of the tourism industry in Kazakhstan [3]. In addition, there is growing tourist demand in emerging foreign markets, such as the China, India, the Middle East and Russia. Kazakhstan's geographical proximity offers relatively easy ability to develop tourist products for these markets. However, it should be noted that the economy of Russia and some countries of the Middle East highly depend on selling mineral resources, for example oil. Currently, with the falling price of oil it is difficult to estimate the future of the economic situation in these countries. In addition, Kazakhstan's tenge is becoming stronger against Russian ruble and this may decrease buying power of Russians.

The competitive environment. The growing and active competition among developed and developing tourist destinations, especially neighbouring countries Azerbaijan, China, Georgia, Kyrgyzstan, Mongolia, Russia, Turkmenistan and Uzbekistan, presents high competitive environment and requires Kazakhstan adequate positioning in the market, as well as its ability to adapt to constantly changing conditions. Kazakhstan's tourism competitiveness index ranked 88 out of 140, whereas, Azerbaijan 78, Russia 63 and Kyrgyzstan 111 [4]. That some states with high ranks fail to take advantage of effectively convert it into financial profit for their local residents. Therefore, it important to consider communities benefits during the designing plan.

The result of the study claims that safety is the most critical competitive pros. According to The Overseas Security Council, Kazakhstan was rated as the safest place in the Central Asia. It means country can ensure better security for the tourists than neighbours. Despite this fact, most of the western population tend to perceive Kazakhstan with «stan» states, for instance Pakistan and Afghanistan. This leads to negative awareness of the place, that there is a war or recession, which result on low competitive destination image. Whereas, one of the main rival's oil rich Azerbaijan seems to be spending enormous money for the development of place branding. For example, state developing destination campaign «Azerbaijan – the Land of Fire», the slogan uses as advertisement on popular Spanish football club Atletico Madrid [2].

The socio-cultural environment. In terms of socio-cultural environment there is a growing tendency by which, - particularly in Russia and China it is mostly the youth segment that desires to travel the world, is interested in outdoor activities, and want to learn about other cultures and landscapes. This is the opportunity for the development and implementation of a strategy to position Kazakhstan as a new tourist destination with unique tourism products [5]. In addition, strategy can consider European market, as an opportunity for development and implementation of tourist products to consumers for more mature age: off-season, cultural, recreational and spa tours [6].

The technological environment. Recently, Kazakhstan has announced a transition towards green economy, however, the main contribution to environmentally friendly and energy-saving technologies in the tourism can come from the host of Astana expo-2017 [7, 8]. The event's theme is «future energy», exhibitors will demonstrate latest technologies in the construction and operation of facilities. The increase use of the Internet to search for and purchase tourism products, necessitates the presence of companies advertising and sales of tourist products [9]. From three leading tour operators in Kazakhstan just only Otrar Travel offers tours, moreover, the popular Russian and Chinese tour operators, Tez-tour and Wendy Wu tours respectively, do not provide options for Kazakhstan. Furthermore, although social media has now become one of the essential tools for communication and attraction of potential visitors, is not being used in regards to Kazakhstan as a tourist destination [10]. There is also a gap of presentation, which negatively influences the development of tourism.

The political environment. According to Marat, the majority of western scholars and newspapers consider Kazakhstan as a mineral rich land with an autocratic governmental regime. Since 1991, 74-years old Nazarbayev ruling the country and won the last election in 27 April 2015 [11]. This means that the government policy will not have a considerable changes in the near future.

In terms of foreign policy, Kazakhstan started economic integration with Russia in Eurasian Economic Union. The most significant advantage of the union is the free movement of product and labour. Nevertheless, with the current Ukraine crisis there is tension in the country about Russian foreign policy, which can negatively affect industry. Furthermore, it seems government is also interested in the ten most developed states granting them a free visa regime including United Kingdom and Germany. In addition, Lillis point out that new visa regime would not result on rapid increase of tourists.

The resources fit. Kantarci et al., identified several obstacles for the development of tourism business in Kazakhstan such as administrative barriers (long registration), the lack of legislation regulating the social

rules of tourism, applying to employees and employers (no Certificates of tourism), lack of tax incentives tourism industry, poor hotel services with high prices, lack of communication means. Zhidkoblinova explains the inflated prices for hotels with a low occupancy of the place, lack of a competitive environment and a strong dependence on business travellers [1]. Furthermore, the high price of accommodation and air tickets significantly increase the cost of tours in Kazakhstan and, accordingly, reduce its price competitiveness in the international market. One of the resource that Kazakhstan can use it is providing mega events. For instance, hosting International Exposition EXPO 2017 bring brand image and tourists. Furthermore, Kazakhstan's Almaty has great chance to host the 2022 Winter Olympics games with only competing Beijing, the winner will be announced in 31 July 2015 [2].

Portfolio analysis of the concept shows that concentrating on cluster system can be beneficial to provide different types of products for different tastes. Creating a tourist cluster actually determines positioning areas and affects the formation of the positive image of the region as a whole that will create highly integrated tourism supply and competitive tourism products.

There is a large volume of published studies projecting the growth of outbound tourists in China, Russia, India and the Middle East by 2020 with over 200 million. This means Kazakhstan will be - located in the centre of the world's increasing business of outbound tourism. In addition, steady rise of different types of tourism products such as adventure and city break travel, gives opportunity to differentiate the product by location, products and target group [11]. Therefore, branding each region in terms location and offering great range of tourism product is essential for spreading visitors among the country and it also helps to develop rural areas.

The concept characterizes the brand of Almaty focusing on winter and adventure trips to the mountain and Charyn canyon, which is famous with rock formations [11]. While Southern Kazakhstan with archaeological sites of medieval settlements and different old cities will be branded as a centre of the Silk Road for culture seekers [1]. The West Kazakhstan cluster is presented as Caspian Rivera focusing on beach tourism, with Aktau city, Mangistau region and part of Western Kazakhstan region. The East Kazakhstan cluster will be branded as the world of natural wonders and become the eco-tourism centre. The Astana cluster is presented as the centre of nomadic culture and short break holidays.

In addition, strategy could benefit from adding dark tourism as range of product. There is growing interests from academics and tourists about places were becoming popular due to disquieting senses that refurbish horrible points in history. Kazakhstan has huge dark tourism potential, because in the past most of USSR polygons were in this country. For instance, the former experiment ground of Semipalatinsk situated to the east with its previous HQ Kurchatov and the neighbouring ghost city of Changan at a former air force site. The decaying Aral Sea in the east with the examining base for Soviet nuclear ICBMs during the Cold War. Furthermore, there are location of previous Soviet Stalinist KarLag and Spassk gulag monuments. Lastly, remembering exhibition for the sufferers of repression ALZHIR [4].

Table

The summary of SWOT analysis for «the concept of tourism development in Kazakhstan 2020» can be seen in the table below

Internal (Capability) Analysis	Strengths	Weaknesses
1	2	3
Resources	Untapped tourism, Financial source, Potential of the nature, national parks, heritage sites, Cluster concept, mega events Expo 2017	Administrative barriers, Lack of legislation, poor hotels with high prices, expensive airfare, insufficient skilled labour
Products	Winter, beach, adventure, cultural, dark tourism	Winter, summer seasonality, not enough promotions, strategic planning, alternative leisure
External (Environment) Analysis	Opportunities	Threats
Competition	Events such as Astana Expo 2017, Winter Universiade 2017 Almaty, bid for 2022 Winter Olympics	Azerbaijan, Uzbekistan, Kyrgyzstan, similar product, cheap labour

Continuation of table

1	2	3
Political	China, Russia good relation Visa for 10 states,	Corruption, Ukraine crisis, ISIS
Economic	Tourism is growing China and Russia	Oil prices, unfavourable exchange currency (ruble), inflation rate,
Socio-cultural	Rise among 16-45 years old,	Not many English signs
Technological	Energy-savings technology, Rise internet usage, purchase, social media, construction of fast railway, airports and road.	Not well presented in the internet and social media

Note. Compiled by the authors.

Acceptability

Social profitability. The cost of the strategy is an estimated \$10 billion with \$4 billion coming from public sector and the rest from private sector. Projected profits and benefits that contribution of the industry to GDP will rise from \$2.4 billion to \$7 billion [2]. The employment growth is the key element determines destination strategies to invest and in the case of Kazakhstan it is expected to create more than 300 thousands positions [11].

Risk

However, there is a financial risk as Kazakhstan's economy mostly relies on selling oil and with the current price it will be difficult to implement its tourism strategy. Furthermore, there is increasing threat of terrorism in the region coming from ISIS, which can turn off interest of investors. Ecologists and community concerns about national tourist project «Kok Zhailyau» due to the potentially very damaging effects to biodiversity. Moreover, environmentalists claims that it can fully destroy wildlife conservation, which is critical for endangered animals such as snow leopard and Turkestani linx. Despite economic benefits it is suggested to focus on existing mountain ski resorts such as «Shymbulak» and «Tabagan», which do fully perform [11].

Stakeholder satisfaction. One of the key stakeholders are community and they can benefit from employment opportunity, which will grow to 270,000 jobs [2]. Another, interested party is the government of the Republic of Kazakhstan will maintain a leadership role in the development of tourism policies as the main coordinator of the performance of government policies and activities of state bodies aimed to the development of the tourism industry. Currently, tourism board created as a consultative body under the government of the Republic of Kazakhstan.

Feasibility. Funding. The concept suggests that 60 % of funding comes from private sector. Furthermore, there is interests appears from Iranian and Turkish investors on «Kenderli» national tourist plan. The project's cost is around 3.3 billion dollar and provides beach holiday and some water activities. In addition, the resort plans to offer caviar bath as distinguishing luxury enjoyment attraction. The rest 40 % of financing presented from government, however, it should be noted that Kazakhstan economy like Russian depends on selling raw materials

Human resources. There is considerable shortage of qualified personnel in the tourism sector, including academic education, is a problem with meeting requirements of the labour market. The concept notice those issues, and dealing with it by cooperation with international scholarship «Bolashak» providing opportunities to study abroad on essential tourism subjects such as tourism management and hotel management. In the long term, it can result on positive changes in the Kazakhstani tourism.

Timing. The extract below has been translated by the author: the concept is divided into 3 development stages, each with goals and objectives. The first stage will be during 2015 and 2016, and it recommends to use 30.0 % of the total budget for the period from 2015 to 2020. During that period, the aims will be to initiate the construction of all national tourist projects, promote the development of other tourism projects, invest in common infrastructure and human resources, define and implement a system of marketing, branding national tourism and other related activities, and take steps directed to obtaining rapid results.

The second phase is set between 2017 and 2018, and it advises to use 45.0 % of the total allocated budget for the implementation of the tourism strategy. From the investment perspective it is suggested to begin building tourism infrastructure for the development of national tourism projects, including projects with low risks and opportunities of realization in the short term. During this step, it is important to continue to develop infrastructure, capacity-building human resources and perform various operations in marketing.

The final stage of the concept considers period of 2019 and 2020 with the suggested 30.0 % of the total investment for period of 2015 and 2020. During this period, implementation of activities carried out within the framework of the second stage will continue, with the diversification of tourism offerings and strong support to small and medium-sized businesses for the development of national tourism projects.

Logistics. The state is currently suffering from inadequate development of engineering, transport and social infrastructure in the areas of tourism, inaccessibility of tourist facilities, insufficient quantity and quality of roadside service infrastructure. The concept addresses these issues by improvements existing and creating new airports, checkpoints and developing transport system to connect tourists with the attractions. For instance, construction of the new airport with a higher capacity near to «Kenderli» resort territory. In addition, the industry also can benefit from highway corridor Western Europe –Western China. Nonetheless, it seems this issues is not going to solve in the short term, because, for instance government stopped construction of the fast speed train between Astana and Almaty due to high cost of the project [12].

Competitive reaction. The analysis find that neighbouring countries such as Uzbekistan, Kyrgyzstan and Azerbaijan can be challengers for the prospected market with similar products. For instance, Uzbekistan has advantage of more historical sites, museums and cheap labour, which can be threat to the development of South Kazakhstan cultural cluster [13]. Furthermore, Kyrgyzstan also has pros of cheap work force and developing beach tourism, which may present a risk for the high cost tourist project of Kenderli resort in West Kazakhstan cluster [14]. Therefore, to avoid similarity it is recommended to offer new services and products that utilize a niche strategy. However, Marat suggests that Central Asian countries should consider promotion of the destination together as a region, because there is a shift from single travel towards multiple trips [15]. Moreover, Marat provided a good example of implementation these tactics, for instance Balkan and East Asian countries.

Conclusion

In this investigation, the aim was using evaluation framework to assess the concept of tourism development in Kazakhstan until 2020. The results of this examination shows positive changes in the main international tourism indicators, however, it can be concluded that the potential of the Kazakhstani tourism industry is not fully realized. In terms of suitability, the cluster system development provides opportunities to develop tourism even in untapped areas. In addition, the fast growing outbound tourism in targeted countries such as Russia and China, gives argument to implement strategy. However, the concept faces several challenges such as poor service, expensive flights and hotels. In terms of acceptability, the calculation of cost benefits do not provide reliable information due to limited data. Nevertheless, strategies for destinations mostly sees social profitability as a tool of acceptability, thus, the forecast suggests rise of jobs. However, the strategy has various risks, the main one being funding. The Kazakhstan economy mostly relies on export of oil and gas, with the current oil price it can be difficult to implement the tourism strategy. In terms of feasibility, the concept recognizes the problems with transportation and considers to improve existing and build new airports, fast speed trains and roads. Furthermore, the competitors` reaction can be to provide identical products due similarity of culture and landscape.

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Қазақстандағы туризмді дамыту бағдарламасын жетілдіру жолдары

Мақалада қазіргі кездегі туризм экономиканың ең қарқынды дамып келе жатқан секторларының бірі және Қазақстанда туризмді дамыту тұжырымдамасының бағыттары да өзекті болып табылатыны белгіленген. Авторлар қонақжайлық секторында жұмыс орындарының көбейгенін анықтаған. Бұл жағдай көптеген елдерде туризмді дамытуға зор әсер етеді. Мақалада 2020 жылға дейін Қазақстандағы туризмді дамыту тұжырымдамасын бағалау жүйесі қарастырылған. Тұжырымдаманың міндеттері мен миссиясы зерттелген, олар бес тармақта шоғырланған: жаңа туристік тәжірибе үшін негіз құру, экотуризмді дамыту, экологиялық білім беру, кәсіптік менеджментті реттеу, ел ішінде қазақстандық тауарға оңай қолжеткізу, жаһандық бәсекеге қабілетті қызметтер мен туристік тауарларды алға жылжыту. Нәтижесінде Қазақстандағы ішкі туризмді дамытудың нарықтық үрдістері бірқатар факторларға: тұтастай туризм саласы, экономика, демография, экология, технологияға байланысты болады деген тұжырым жасалды. Сондықтан бұл стратегия үш топта қарастырылатын шеңберлерге сәйкес бағаланады, мысалы, жарамдылық, қолайлылық және орындылығы. Осы зерттеу нәтижелеріндегі халықаралық туризмдегі негізгі көрсеткіштердің оң өзгерістеріне сүйене отырып, Қазақстанның туристік саласының әлеуеті толық жүзеге асырылмаған және де мүмкіндігі мол деп айтуға негіз бар.

Кілт сөздер: туризм, даму, экономика, талдау, тағайындау, басқару, стратегия, сектор, қамтамасыз ету, құрылым.

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Пути совершенствования программы развития туризма в Казахстане

В статье отмечено, что в настоящее время туризм становится одним из быстро развивающихся секторов экономики и направления концепции развития туризма в Казахстане. Сектор гостеприимства начал предоставлять больше рабочих мест, что также влияет на развитие туризма. В статье рассмотрены системы оценки концепции развития туризма в Казахстане до 2020 года. Исследованы задачи и миссии концепции, которые сконцентрированы в пяти пунктах: создание рамок нового туристского опыта, развитие экотуризма, экологическое образование, создание профессионального управления и регулирования, обеспечивающего легкий доступ внутри страны, продвижение глобальных конкурентных услуг и товаров для путешественников. Сделан вывод, что развитие внутреннего туризма в Казахстане будет зависеть от ряда рыночных тенденций — в сфере туризма в целом, экономики, де-

мографии, экологии, технологий и других факторов. Поэтому эта стратегия будет оцениваться в соответствии с рамками, которые будут рассмотрены в трех группах, таких как пригодность, приемлемость и осуществимость. Результаты этого исследования показывают позитивные изменения в основных показателях международного туризма, однако можно сделать вывод, что потенциал казахстанской индустрии туризма не полностью реализован.

Ключевые слова: туризм, развитие, экономика, анализ, назначение, управление, стратегия, сектор, обеспечение, структура.

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