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(E-mail: mukanovbo@mail.ru)***Territorial peculiarities of development of tourism
in the Republic of Kazakhstan**

The Republic of Kazakhstan is characterized by uneven development of the territory for tourist and recreational purposes. In the article areas with high ratings of predisposition for the development of summer tourism are discussed. The main areas of Kazakhstan, favorable for the development of winter types of tourism are considered. The regions of Kazakhstan are quite different in the composition of natural resources used in the organization of recreation and tourism, in their size and combination, as well as in natural and economic factors that facilitate or impede their development. In this regard, the prospects for the territorial development of the tourist market of the Republic of Kazakhstan are considered. The development of inbound and domestic tourism in Kazakhstan will depend on a number of market trends — in tourism in general, the economy, demography, ecology, technology and other areas. The article proposed the direction of development of tourism in the Republic of Kazakhstan in certain tourist clusters with a competitive tourist business, in which tourism professionals who offer attractive tourist products in the domestic and international tourism markets should develop tourism. The development in this direction should contribute to a powerful and stable growth of income from tourism activities for all involved stakeholders — the state, business and employees.

Keywords: tourism, territory, cluster, resort, tourist market, prospect, natural resources, recreation, ecology, factor.

Recently interest in Kazakhstan as a tourist destination has increased significantly throughout the world, and accordingly, the range of tourist services provided by local tour operators is increasing from year to year to attract more travelers.

Today Kazakhstan provides almost all existing types of tourism — educational, entertaining, ethnic, ecological and others. A large number of travel routes throughout Kazakhstan is offered for tourists. In the favored oasis of the southern steppes, at the junction of nomadic and sedentary civilizations, the most ancient cities of the world existed. For centuries a system of ancient caravan roads leading from China to the countries of the Middle East and Europe passed through this land.

Table 1

Number of served tourists by regions and resort areas of the Republic of Kazakhstan in 2017 [1]

Regions	Total visitors	including		
		staying in placements	having a rest in the sanatorium organizations	visiting specially protected natural areas
1	2	3	4	5
Republic of Kazakhstan	6 829 499	5 279 406	288 151	1 261 942
Akmola:	1 112 901	341 399	26 647	744 855
– Shchuchinsko-Borovoe resort area	850 545	150 481	26 557	673 507
– Zerenda resort area	95 503	48 085	-	47 418
Aktobe	105 249	100 450	4 546	253
Almaty:	911 581	703 663	10 516	197 402
– Almaty resort area	614 624	426 342	854	187 428
Atyrau	211 553	184 353	4 798	22 402
West Kazakhstan	120 537	112 321	8 216	-
Zhambyl	116 523	103 912	12 611	-
Karaganda:	345 363	292 509	19 649	33 205
– Karkaraly resort area	82 140	49 628	-	32 512
– The coastal zone of Balkhash lake	39 945	37 238	2 707	-

1	2	3	4	5
Kostanay:	212 690	192 174	19 992	524
– Kostanay resort area	17 668	6 369	11 299	-
Kyzylorda	82 180	59 192	22 988	-
Mangystau:	207 378	205 904	1 364	110
– Kendirli resort area	19 205	19 095	-	110
South Kazakhstan resort area:	375 548	269 974	79 887	25 687
– Saryagash resort area	53 911	7 447	46 464	-
Pavlodar:	307 208	147 485	12 196	147 527
– Bayanaul resort area	176 430	30 753	-	145 677
North Kazakhstan	124 067	120 847	3 220	-
East Kazakhstan:	590 913	486 157	14 779	89 977
– Altay	51 762	44 703	7 059	-
– Alskol resort area	135 698	79 192	570	55 936
– Bukhtyrma resort area	64 208	63 376	-	832
– Ulan resort area	12 894	12 894	-	-
– Katon-Karagay resort area	34 041	842	687	32 512
Astana	989 205	989 205	-	-
Almaty:	1 016 603	969 861	46 742	-
– Shymbulak mountain ski resort	27 062	3 095	23 967	-

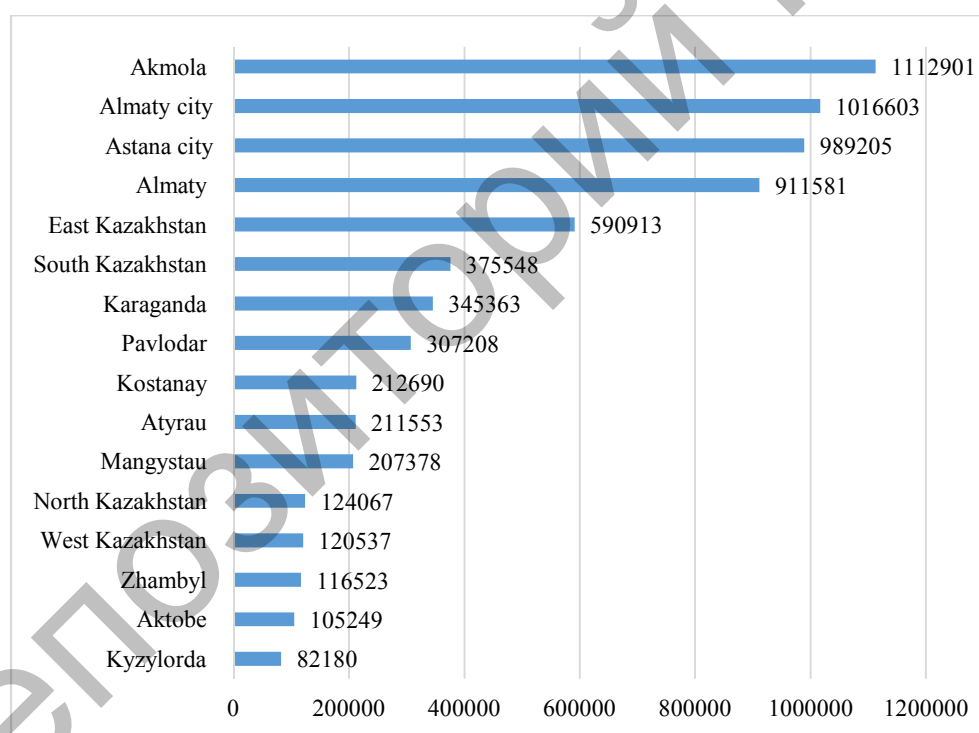


Figure 1. The allocation of served tourists by the regions of Kazakhstan in 2017 [1]

From Table 1 and Figure 1 it can be seen that the distribution of the flow of tourists in the regions and resorts of Kazakhstan is extremely uneven. By the number of served tourists Akmola region is leading by 1 112 112 people, in the second place is Almaty city — 1 016 603 people and in the third place is Astana city — 989 205 people.

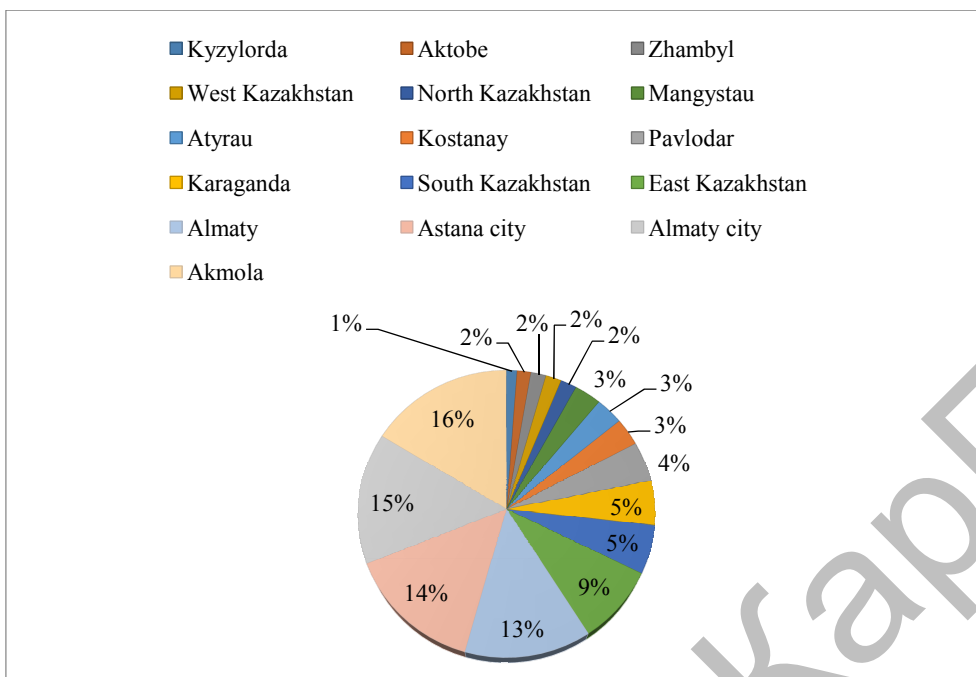


Figure 2. Allocation of served tourists by regions of Kazakhstan in 2017 in a percentage

From Figure 2 it can be seen that the largest market share by the number of served tourists is belonged to Akmola region (16.3 %), Almaty city (14.9 %), Astana city (14.5 %), Almaty Region (13.3 %). These objects account for 59 % of the tourist market of the Republic of Kazakhstan.

Table 2

Dynamics of served tourists in the Republic of Kazakhstan [1]

2013 y.	2014 y.	2015 y.	2016 y.	2017 y.
4 488 656	5 170 673	5 167 618	5 722 583	6 829 499

Table 2 shows that the number of served tourists in the Republic of Kazakhstan is growing from year to year. In 2017 increasing for more than 1 100 000 people is due to the holding of the EXPO 2017 exhibition.

During EXPO 2017 the flow of tourists to the Republic of Kazakhstan significantly increased. It should be noted that in addition to the city of Astana, tourists visited recreational facilities in Kazakhstan. A significant number of non-resident tourists were observed in the State national natural Park «Burabay», located in Burabay district of Akmola region of Kazakhstan. Also, a significant flow of tourists was observed in Almaty. During the exhibition EXPO 2017, the flow of tourists more than three times exceeded the number of tourists for the same period last years.

One of the purposes of the Expo exhibition was to increase the tourist flow to the Republic of Kazakhstan, especially inbound tourism.

Carrying out major events should have economic efficiency, bring income to the budget of the state and regions.

After Expo Kazakhstan became more recognizable in the international arena, tourists from different countries appreciated the recreational resources of Kazakhstan. Undoubtedly, the flow of inbound tourism will increase after the Expo in Kazakhstan.

Kazakhstan plans to hold major events in the future, in particular the winter Olympics.

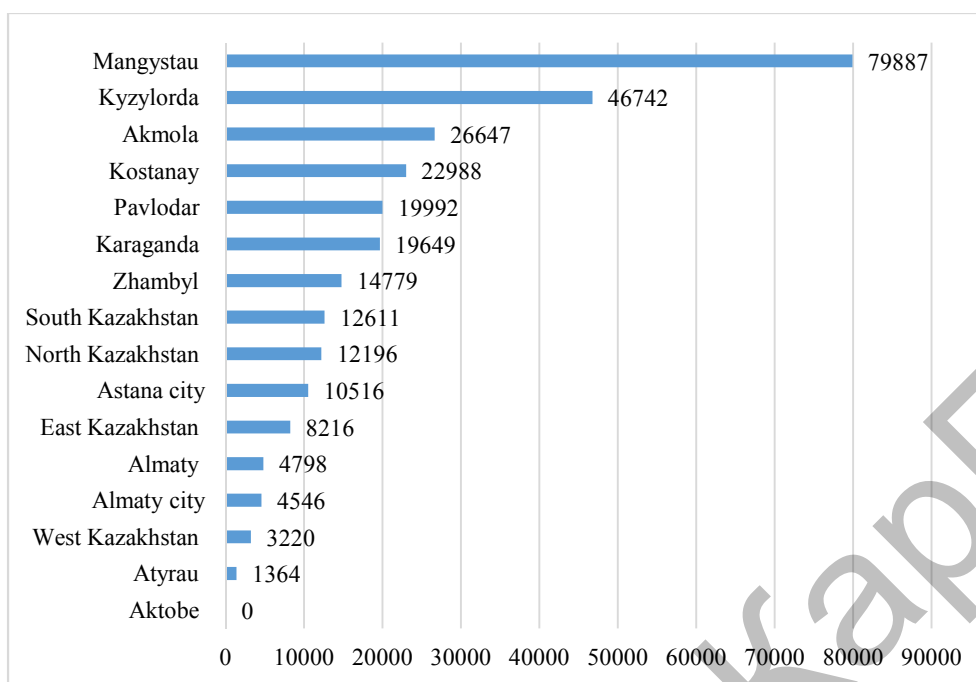


Figure 3. Allocation of vacationists in sanatorium-resort organizations by regions of Kazakhstan in 2017

From Figure 3 it can be seen that the largest number of vacationists in 2017 in sanatorium-resort organizations was observed in Mangystau region — 79 997 people, in Kyzylorda region — 46 742 people, in Akmola region — 26 647 people.

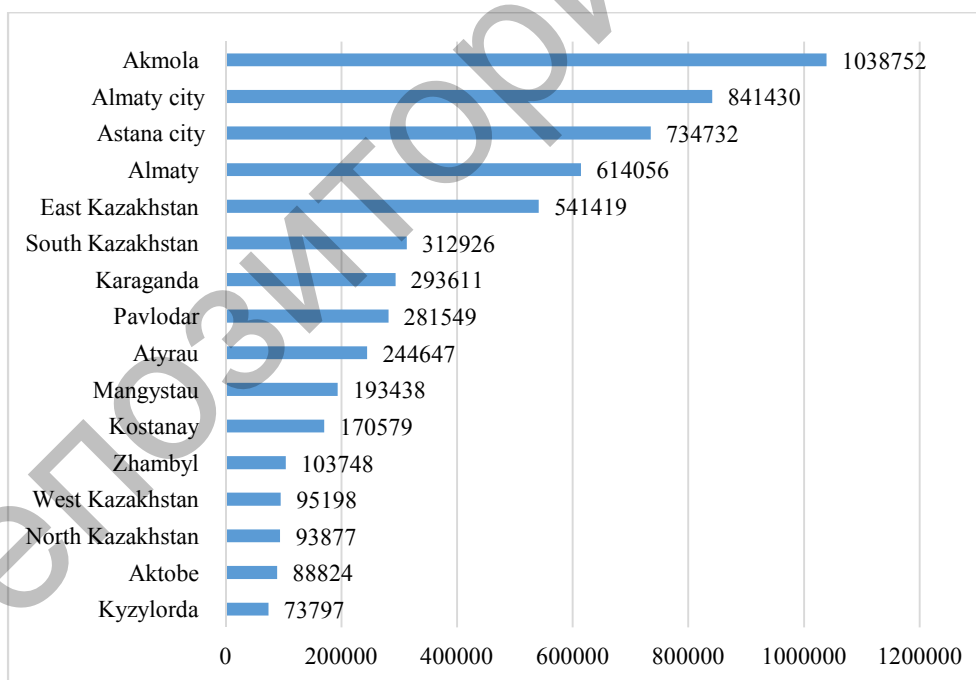


Figure 4. The allocation of served tourists by the regions of Kazakhstan in 2016

Figure 4 shows that in 2016 as in 2017 the leading regions were Akmola, in the second place — Almaty city, in the third place — Astana city, in the fourth place — Almaty region, i.e. the structure of the tourist market in terms of attendance has not changed.

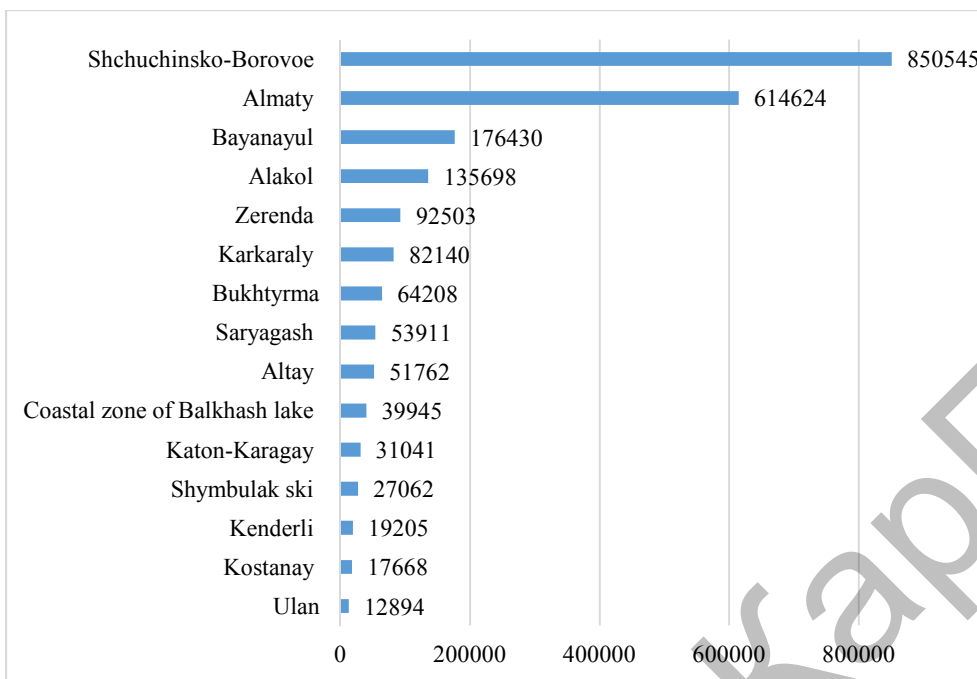


Figure 5. Allocation of served tourists in the resort areas of Kazakhstan in 2017 [1]

From Figure 5 it can be seen that among the resort areas of Kazakhstan, the leading by the number of served tourists in 2017 are Shchuchinsko-Borovoe resort area (850 545), Almaty resort area (614 624). These resort areas go with a significant margin from other resort areas, so Bayanauyl resort area which ranks third has only 176 430 visitors.

One of the indicators of the development of tourism in a particular region is the volume of services provided by.

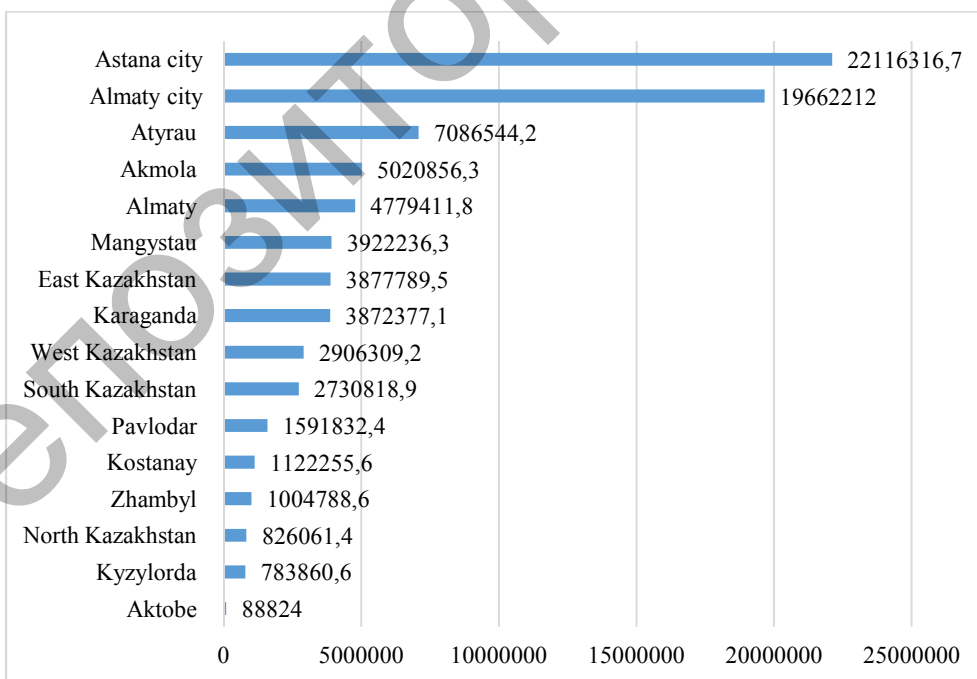


Figure 6. The volume of services provided by places of accommodation in the Republic of Kazakhstan by the regions in 2016, thousands of tenge

From Figure 6 it can be seen that the largest volume of services provided by places of accommodation in 2016 was observed in Astana city 22.1 billion tenge, in Almaty city 19.6 billion tenge. These two cities

come with a large margin from other cities. So on the third place goes Atyrau region — 7 billion tenge. The cities of Astana and Almaty account for 50 % of the market of hotel services in Kazakhstan.

The Republic of Kazakhstan is characterized by uneven development of the territory for tourist and recreational purposes, with fuller use of mountain and foothill territories. It should be noted that hotels and tourist centers generate the bulk of the income of the tourist industry. The analysis shows that for the organization of summer types of tourism the most favorable areas are Northern Kazakhstan, mountain and foothill areas of South and East Kazakhstan. These areas are characterized by the most optimal combination of the thermal regime of the territories, the temperature of surface waters and vegetation.

Areas with high estimates of the nature of vegetation, thermal conditions, watering, i.e. the regions that are favorable for the development of summer tourism include some regions of the West Kazakhstan and Aktobe regions, part of the Kazakh flat-nipple area (Karaganda and Akmola regions), as well as South Kazakhstan, Zhambyl, Almaty regions [2].

It is obvious that the organization of summer types of tourism in areas classified as very favorable and favorable will take place under more comfortable conditions, and the duration of the summer institutions will be quite long. The main areas favorable for the development of winter types of tourism are located in the eastern part of Kazakhstan (fringed from the north-east and east), as well as in the middle mountains of the Trans-Ili Alatau. These areas have high snow cover estimates and persistent low temperatures. The southern and western regions of the republic are distinguished by low indicators of the leading natural factors and form disadvantaged areas by winter types of tourism.

The above shows that the regions of Kazakhstan are quite different in the composition of natural resources used in the organization of recreation and tourism, in their size and combination, as well as in natural and economic factors that facilitate or hinder their development.

In order to achieve national goals of diversifying the economy and improving the welfare and quality of life of the population of the Republic of Kazakhstan, tourism industry of the Republic of Kazakhstan should develop in certain tourist clusters with a competitive tourist business, which is engaged in professional tourism workers, offering attractive tourist products in the domestic and international tourism markets. Development in this direction should contribute to a powerful and stable growth of income from tourism activities for all interested stakeholders — state, business and employees. Until 2020, new accommodations will be built for 4.29 million tourist arrivals (50.8 %), with almost half of the tourists arriving in clusters of Almaty (23.8 %) and Western Kazakhstan (22 %), while as another half will focus on clusters of Astana (17 %), East Kazakhstan (11.9 %), South Kazakhstan (8.6 %) and other areas of the Republic of Kazakhstan (16.8 %).

It is necessary to develop new approaches in the organization of tourism at various territorial levels (country, region, district, city). One such method is the cluster approach. Currently, for domestic tourism, the task of forming clusters in order to increase the competitiveness of the respective administrative-territorial unit has become the most urgent.

The tourist cluster is the concentration within one limited area of interrelated enterprises and organizations engaged in the development, production, promotion and sale of a tourist product, as well as activities related to the tourism industry and recreational services. The purpose of creating a tourist cluster is to increase the competitiveness of the territory in the tourist market due to the synergistic effect, including: 1) increasing the efficiency of enterprises and organizations included in the cluster; 2) stimulating innovation and the development of new tourist destinations. Creating a tourist cluster actually determines the positioning of the territory and influences the formation of a positive image of the region, which in general will create highly integrated tourist offers and competitive tourist products.

It is possible to create five tourist clusters in Kazakhstan: Astana, Almaty, East Kazakhstan, South Kazakhstan and West Kazakhstan. [3]

Almaty cluster is a cluster that includes Almaty city and part of Almaty region. Almaty city will be the center of a cluster [4]. The tourist cluster of southern Kazakhstan includes the Central and Eastern part of Kyzylorda region, the southern part of South Kazakhstan region and the South-Western part of Zhambyl region.

The tourist industry of the city of Kapshagai is based on the resources of the Kapshagai reservoir. Tourists are interested in rock paintings located on the right Bank of the Ili river, and the scenery for the film «Nomad», which are used as a tour object.

Recreational relationship of interest, the Chu-ili mountains, mountain Kindiktas, characterized by irregularity of the surface, rather deep gorges. This mountain area, with its landscape expressiveness, attractive as a multifunctional recreational area.

It should be noted that a significant difference between the recreational opportunities of the region and the degree of their use. The degree of use of recreational opportunities in the region is very low. Resorts and sports facilities of southern Kazakhstan are world-famous, but used for international tourism is very small.

As the development of tourism infrastructure in our country can predict the increasing attractiveness of active recreation in the mountains. The region of TRANS-ili Alatau has particularly favorable prospects in this regard, which, due to its unique natural and climatic conditions, creates almost unlimited opportunities for tourism throughout the year. Almaty region has high hopes for the development of tourism. Charyn canyon is of great interest in terms of tourism. It is only 230 kilometers East of Almaty. More famous sights of Almaty region are «Medeo» and «Shymbulak». Skating rink «Medeo» is one of the three most unique Alpine skating rinks in the world. No less important tourist attraction that tourists must visit is the Kolsay lakes. Here only the infrastructure is developed only at the first lake. To the other lakes there is not even a road and, therefore, most tourists do not reach there.

East Kazakhstan is Altai and its foothills wooded areas, the Irtysh river and lakes Zaisan, Marakol, Alakol, Sauskan. The fauna and flora of the region are rich and diverse. Semipalatinsk region is the birthplace of the great Kazakh poet and educator Abay Kunanbayev, an outstanding writer Mukhtar Auezov. In short, there is everything that can attract tourists: beautiful landscapes, a variety of climatic zones, cultural and historical attractions, a wide range of environmental and sports tourism services.

Close attention is now paid to the development of tourism in the Alakol district, as it is located in a favorable climatic zone. On the territory of the district there are rivers Tentek, Chingali, Amanti was Kyzyltu, Yrgayty. On the shore of lake Alakol there are numerous guest houses, recreation areas, resorts and tourist centers. In the development of ecological tourism Alakol state reserve plays an important role, which was organized in 1998. The territory covers an area of more than 20 thousand hectares of wetlands. Alakol district has tourist resources, attractive for recreation, but there is almost no tourism infrastructure.

Thus, with the richest recreational opportunities, tourism in East Kazakhstan is very poorly developed. The reason for this is the weak development of infrastructure, primarily roads.

The cluster of Western Kazakhstan includes the entire Mangystau region and part of the West Kazakhstan region.

In the west of Kazakhstan there are a lot of interesting natural objects (meteorite crater in Aktobe region, Karagiye depression, Ustyurt chinks) and good places of rest (Ural river, salty lake Shalkar, Caspian sea). While the Caspian sea is not very suitable for tourism, but in the future it will become a world-class resort.

Currently, the Caspian sea, a project to create a resort in the bay of «Kenderly» project's cost is 2.3 billion dollars. Participants of the project are Kazakhstan and Saudi Arabia.

The project of the resort area will be implemented in the area of «Kenderli» bay, 70 km from the city of Zhanaozen. There will be 6 entertainment complexes in 4 special zones.

The Caspian Sea is a recreational resource that can attract non-resident tourists. For example, in the recreation area «Kenderli» the average summer water temperature in the bay is 25 degrees. At the same time there are natural beaches, resorts and opportunities for sea cruises.

Other parts of Kazakhstan. For regions not included in the cluster, as well as at the district level, it is necessary to identify prospective tourism products for the development of mainly domestic tourism. In this case, it is advisable to develop and implement small projects for the development of appropriate infrastructure. For all regions of Kazakhstan, one of the most attractive tourist products is ecological tourism, which is one of the 20 priority types of tourism, including traveling to places with relatively untouched nature in order to get an idea of the natural, cultural and ethnographic features of this area. At the same time, such visits should not violate the integrity of ecosystems and create conditions under which the protection of nature and natural resources becomes beneficial for the local population. Taking into account the planned course of the country for the transition to the principles of «green economy», the example of agro-tourism is not only as a generator of alternative employment for the rural population, providing financial support to the regional economy and the development of environmentally friendly agricultural production. Agritourism is a powerful tool for environmental protection, contributing to the involvement of the local population in this process, for which respect for nature will be economically beneficial.

In Kazakhstan, there are strong disparities in the development of various types of tourism. The development of outbound tourism prevails, leading to invisible imports of capital. It is important for Kazakhstan to develop inbound and domestic tourism. Inbound tourism provides foreign exchange earnings to the country's economy. Domestic tourism allows the population of the state to restore their strength, to direct the pro-

ceeds from tourism to domestic recreational facilities, to develop the internal infrastructure of the economy. Domestic tourism also has an educational purpose, contributes to the growth of patriotism and pride of citizens for their country.

In this regard, an urgent task for Kazakhstan is the development of inbound tourism, which is a priority for the state directions of tourism development.

The development of inbound and domestic tourism in Kazakhstan will depend on a number of market trends – in tourism in general, the economy, demography, ecology, technology, and other areas. The main long-term trends in tourism in general are: 1) stable development of international tourism, followed by an increase in the number of international arrivals and revenues from international tourism, which provides a generally positive market basis for the development of the tourism industry in Kazakhstan; 2) growing tourist demand in emerging foreign markets such as the people's Republic of China, the Republic of India, the middle East and the Russian Federation. The geographical location of these countries provides an opportunity to develop tourism products for these markets and to sell them relatively easily due to their territorial proximity to Kazakhstan; 3) relatively high and stable demand in developed foreign markets, such as Europe, which gives Kazakhstan the opportunity to sell its attractive and unique tourism products in these markets; 4) growing tourism supply from developing destinations such as the Republic of Azerbaijan, the people's Republic of China, Georgia, the Kyrgyz Republic, Mongolia, the Russian Federation, Turkmenistan and the Republic of Uzbekistan, which in the long term is likely to compete with Kazakhstan's tourism supply; 5) high, growing and active competition, both among developed and developing tourist destinations, which requires Kazakhstan's analogues adequate positioning in this market, as well as the ability to adapt to its ever-changing conditions.

All over the world tourism belongs to the rapidly developing and economically effective direction of economic development. The development of tourism leads to the creation of jobs, the solution of social issues, provides an inflow of tax payments, increases the prestige of the state in the international arena. In addition, the development of tourism leads to the development of related industries such as transport, communications, construction, light and food industries. Tourism is a long-term and stable source of income of the state. Therefore, the development of tourism is an urgent task not only for an individual country, but also for all countries of any continent.

The development of tourism is an urgent task for the Republic of Kazakhstan. The Republic of Kazakhstan has a huge potential for tourism development. Diverse geographical landscape, rich flora and fauna, distinctive national culture create all the prerequisites for the successful development of the tourism industry in our country. Natural and recreational resources of Kazakhstan, as well as national traditions and features, mentality, customs have an attraction for foreign tourists, as they have already been saturated with the offered tourist services in the markets of Europe and Asia. For the border areas of Kazakhstan there are also great prospects for the development of tourism. It is advisable to deepen international cooperation, create and develop joint tourist routes, including one / two-day excursions for citizens of neighboring countries, holding festivals of culture. In general, local executive bodies need to strengthen cooperation with the central authorized body in the field of tourism, revise / develop regional master plans for the development of tourism in the short / long term, constantly update databases containing a list of functioning tourism organizations, tourist infrastructure, including locations by type, entertainment and other objects. It is necessary to strengthen work with entrepreneurs in the field of tourism, as well as related fields of activity, to identify levers that contribute to the effective work of instruments of state support on the ground.

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А.Ж. Садуов, Б.О. Муканов, Д.Т. Нұрсұлтан

Қазақстан Республикасында туризмді дамытудың аумақтық ерекшеліктері

Қазақстан Республикасы үшін аумақты туристік-рекреациялық мақсаттарда біркелкі емес игеру тән болып табылады. Мақалада жазғы туризмнің дамуына бейімділігі бойынша жоғары баға алған аудандар қарастырылған. Қазақстанның қысқы туризм түрлерін дамыту үшін қолайлы негізгі аудандары қарастырылған. Олар демалыс пен туризмді ұйымдастыру мақсатында пайдаланылатын табиғи ресурстардың құрамы, олардың көлемі мен үйлесімі, сондай-ақ оларды игеруді жеңілдететін немесе қиындататын табиғи және экономикалық факторлар бойынша айтарлықтай ерекшеленеді. Осыған байланысты Қазақстан Республикасының туристік нарығын аумақтық дамыту келешегі қарастырылды. Қазақстанда келу және ішкі туризмді дамыту бірқатар нарықтық үрдістерге тәуелді — тұтастай алғанда туризмдегі, экономикадағы, демографиядағы, экологиядағы, технологиядағы және басқа да салаларда. Мақалада бәсекеге қабілетті туристік бизнесі бар белгілі бір туристік кластерлерде Қазақстан Республикасының туризмін дамыту бағыты ұсынылды, онда туризмді дамытумен туризмнің ішкі және халықаралық нарықтарында тартымды туристік өнімдер ұсынатын туризмнің кәсіби қызметкерлері айналысуы тиіс. Осы бағыттағы даму барлық тартылған мүдделі тараптар — мемлекет, бизнес және қызметкерлер үшін туристік қызметтен түсетін табыстардың қуатты және тұрақты өсуіне ықпал етуі тиіс.

Кілт сөздер: туризм, аумақ, кластер, курорт, туристік нарық, келешек, табиғи ресурстар, демалыс, экология, фактор.

А.Ж.Садуов, Б.О.Муканов, Д.Т.Нурсултан

Территориальные особенности развития туризма в Республике Казахстан

Для Республики Казахстан характерно неравномерное освоение территории в туристско-рекреационных целях. В статье рассмотрены районы, имеющие высокие оценки предрасположенности развитию летнего туризма. Рассмотрены основные районы Казахстана, благоприятные для развития зимних видов туризма. Они довольно сильно различаются по составу естественных ресурсов, используемых в целях организации отдыха и туризма, по их размерам и сочетанию, а также по природным и экономическим факторам, облегчающим или затрудняющим их освоение. В связи с этим рассмотрены перспективы территориального развития туристского рынка Республики Казахстан. Развитие въездного и внутреннего туризма в Казахстане будет зависеть от ряда рыночных тенденций — в туризме в целом, экономике, демографии, экологии, технологии и прочих сферах. В статье предложено направление развития туризма Республики Казахстан в определенных туристских кластерах с конкурентоспособным туристским бизнесом, в которых развитием туризма должны заниматься профессиональные работники туризма, предлагающие привлекательные туристские продукты на внутреннем и международном рынках туризма. Развитие в данном направлении должно способствовать мощному и стабильному росту доходов от туристской деятельности для всех вовлеченных заинтересованных сторон — государства, бизнеса и работников.

Ключевые слова: туризм, территория, кластер, курорт, туристский рынок, перспектива, природные ресурсы, отдых, экология, фактор.

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