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**PLACE OF TOURISM IN THE ECONOMY OF THE REPUBLIC
OF KAZAKHSTAN AND ANALYSIS OF ITS COMPETITIVENESS**

Abstract. The article examines the current level of competitiveness in the sphere of tourism of Kazakhstan. The tourism industry has a great potential for development in the Republic of Kazakhstan, contributing to the GDP growth, which determines the relevance and necessity of increasing the level of its competitiveness. An increasing number of tourist destinations are opening around the world and investing to the tourism industry is growing as well, which turns it into a key driving force of social and economic progress through the creation of new jobs and enterprises, boosted export earnings and infrastructure development.

Over the past six decades, world tourism has demonstrated steady growth and diversification, becoming one of the largest and fastest growing sectors of the economy in the world.

Kazakhstan, possessing unique natural resources, cultural heritage, historical monuments, including those located along the Great Silk Way, can harmoniously integrate into the international tourism market and achieve its intensive development, which will ensure steady growth in employment and the development of related industries, increasing income and the influx of investment to the national economy. To implement this process, it is necessary to increase the competitiveness level of the domestic tourism industry.

Keywords: tourism industry, tourism competitiveness, marketing, branding, innovation.

From the point of view of the fundamental economy, tourism is an economic complex, the development of which is largely due to world economic processes and relations, rather than immanent (internal) reasons. Nevertheless, tourism is also an important catalyst for the economic growth of many rapidly developing countries, since it acts as a channel for redistributing the gross national product between countries, which is not accompanied by export (import) of goods and services. In other words, if tourists not only take out part of the money earned in other industries, they also create new jobs in other countries.

Modern tourism as an economic phenomenon [1]:

1. has an industrial form;
2. acts as a tourist product and services that can not be accumulated and transported;
3. creates new jobs and is often a pioneer in the development of new areas and a catalyst for the accelerated development of the national economy;
4. acts as a mechanism for the redistribution of national income in favor of countries specializing in tourism;
5. is a multiplier of the national income growth, employment and development of local infrastructure and growth of living standards of the local population;
6. characterized by a high level of efficiency and rapid return on investment;
7. acts as an effective means of protecting nature and cultural heritage, since it is these elements that form the basis of its resource base;
8. compatible with almost all sectors of the economy and human activities, since it is their differentiation and discreteness that creates the potential difference of the recreational environment, which causes the needs of people to change places and cognition.

improving tourist services. Under these conditions, the role of marketing in the activities of tourist firms in Kazakhstan and especially of its element as a competitive analysis, aimed at finding the competitive advantages of each tourist enterprise operating in a competitive market, is increasing.

The competitiveness of the national tourism industry, its place in the national economy, the degree of ambition of the economic strategy and policy is determined by the economic potential of the country, which includes natural resource, human (labor), production, scientific and technical (innovation), investment potentials.

Rating assessments of international organizations, national and international statistics, reports on adopted and planned measures of state bodies to improve the competitiveness of Kazakhstan, scientific publications were employed in order to determine the competitive position of tourism in Kazakhstan.

To determine the competitiveness of the tourism industry, the results of a number of international ratings are used. In the world, the most recognized and respected competitiveness rating is biannual Report on Global Competitiveness [2, 3, 4].

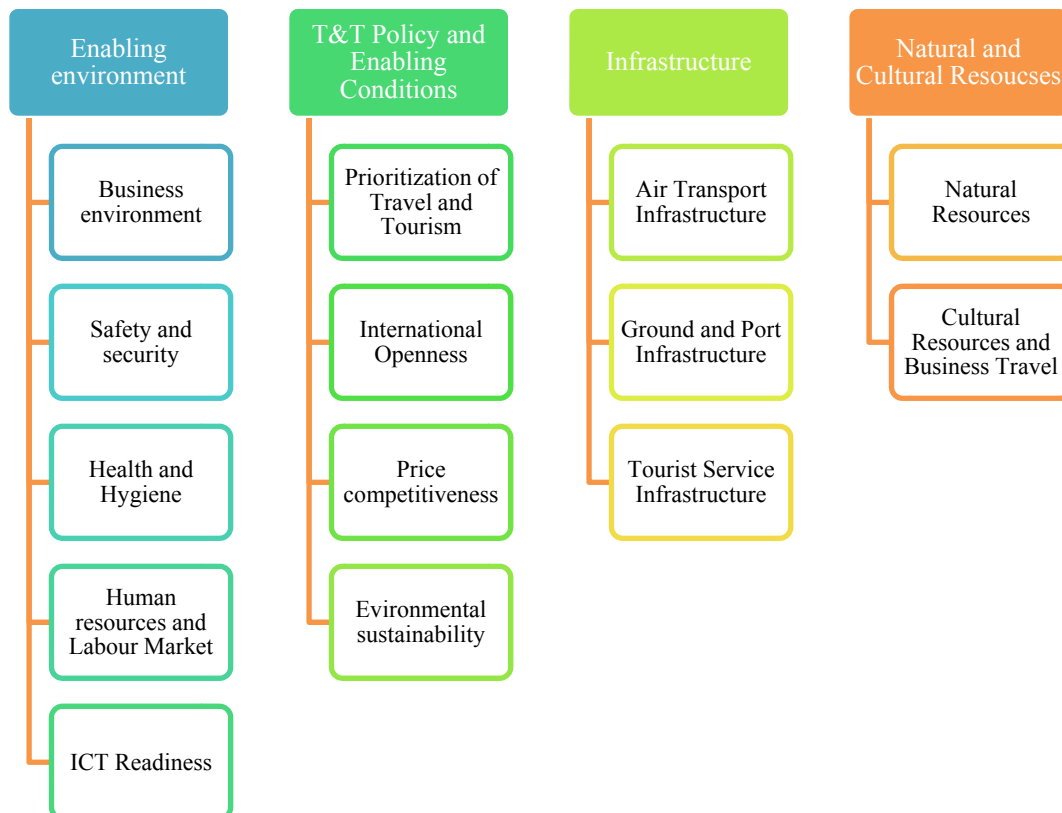
The Travel & Tourism Competitiveness Index (TTCI) -2013 contains a record 140 economies.

The Travel & Tourism Competitiveness Index (TTCI) -2015 contains a record 141 economies.

The Travel & Tourism Competitiveness Report 2017 covers profiles for all of the 136 economies under the study, providing extensive data on global rankings considering 90 indicators according to the TTCI methodology.

Additionally, a number of industry experts' contributions are included there. The data tables representing global rankings and scores for all indicators provide an insight on the global situation of the most relevant tourism and travel measures available. Through the detailed assessments of the T&T globally across numerous destinations, the rankings can be utilize by any stakeholders to ameliorate the industry's competitiveness in respective national economies. It also allows the authorities of the countries to monitor their progress in various areas measured over time.

The TTCI consists of 4 sub-indexes, 14 pillars, and 90 individual indicators, distributed among the different pillars (Figure 1).



Note - compiled by the author based on the source [2]

Figure 1 - Travel and Tourism Competitiveness Index 2017 Index

The Travel & Tourism Competitiveness Index (TTCI) was first published in 2007, it measures “the set of factors and policies that enable the sustainable development of the Travel & Tourism sector, which, in turn, contributes to the development and competitiveness of a country”. [2, 3, 4]

The TTCI has been developed under the aegis of the World Economic Forum’s Industry Program for Aviation, Travel and Tourism, in intense collaboration with such data partners as: Bloom Consulting, Deloitte-STR Global, the International Air Transport Association (IATA), the International Union for Conservation of Nature (IUCN), the World Tourism Organization (UNWTO) and the World Travel & Tourism Council (WTTC); as well as partners in the industry community, namely AccorHotels, Amadeus, AirAsia, Emirates, Etihad Airways, Gulfstream, HNA, Hilton Worldwide, Iberostar Group, Intercontinental Hotel Group, Jet Airways, Jumeirah, Marriott International, SAP/Concur, SpiceJet, Swiss/Deutsche Lufthansa and VISA.

Let us discuss the sub-indexes and respective pillars of the TTCI.

The Enabling Environment sub-index covers the general conditions necessary for operating in a destination, it includes five pillars, namely: Business Environment; Safety and Security; Health and Hygiene; Human Resources and Labor Market; ICT Readiness.

The next sub-index, Policy and Enabling Conditions, captures relevant policies or strategies that have direct impact on the T&T industry: Prioritization of Travel and Tourism; International Openness; Price Competitiveness; Environmental Sustainability.

The Infrastructure sub-index contains data on the quality and availability of physical infrastructure of each destination, including: Air Transport Infrastructure; Ground and Port Infrastructure; Tourist Service Infrastructure.

The Natural and Cultural Resources sub-index captures the principal drivers/motivations of travel: Natural Resources; Cultural Resources and Business Travel.

Spain maintains its 1st place globally in the global T&T competitiveness index for the second consecutive year. The success of the country can be attributed to its unique offer of both cultural (2nd) and natural (9th) resources, combined with sound tourism service infrastructure (2nd), air transport connectivity (9th) and strong policy support (5th).

According to the World Economic Forum, in 2015, Kazakhstan took the 85th place in the ranking, rising by 3 points. In 2017, the country again strengthened its position, rising by another 4 lines in the global tourism competitiveness index.

The ranking of the post-Soviet countries as of 2017 is represented in Table 1.

N	Country	Rank
1	Estonia	37
2	Russia	43
3	Latvia	54
4	Lithuania	56
5	Georgia	70
6	Azerbaijan	71
7	Kazakhstan	81
8	Ukraine	88
9	Tajikistan	107
10	Kyrgyzstan	115

Note - compiled by the author based on the source [2]

Table 1 - The ranking of the post-Soviet countries as of 2017

According to WEF experts, in 2017 Kazakhstan occupies the strongest positions in the rating in the development of information and communication technologies (52nd place), in safety and security (58th place) and in a favorable business climate (36th place). In terms of price competitiveness, Kazakhstan ranks 8th among 136 countries.

By the quality of tourist infrastructure (hotels, resorts, entertainment facilities) Kazakhstan occupies 97th place. Experts also appreciated the openness of the country for international travelers (113th place).

Among the criteria by which openness was evaluated are visa requirements. According to this indicator, Kazakhstan ranks 114th in the world out of 136. According to the concluded air service agreements, the country ranked 121st.

As separate criteria for this position, WEF experts evaluated government expenditures on tourism development (46th place made up% of total budget expenditures compared to other countries) and marketing and branding efficiency in promoting the country as a tourist destination (102nd place).

According to the ecological situation (sustainability of ecosystems), the country ranked 99th. In the category "Health and Hygiene" Kazakhstan ranks 8th in the world. The authors of the rating explain this high result by the presence of a large number of doctors and hospital beds, as well as the absence of malaria cases.

Table 2 contains information on general indicators, such International tourist arrivals and receipts, as well as summarized information on all pillars constituting to the TTCI report.

Table 2 - Kazakhstan's position in the WEF TTCI -2013, 2015, 2017 rankings in the context of general factors

Indicator	2013	2015	2017
International tourist arrivals	4 093 000	4 926 000	4 559 500
International tourism inbound receipts	US \$ 1,208.5 million	US \$1,344,0 million	US \$1,533.6 million
Average receipts per arrival	-	US \$272,8	US \$336.4
T&T industry GDP % of total	US \$2,784.7million	US \$3,503,2 million	US \$3,077.5 million 1.6%
T&T industry employment % of total	374 000 jobs 4.5%	137 500 jobs 1.6%	150,585 jobs 1.7%
International Openness	-	124	113
Prioritization of Travel & Tourism	90	84	93
ICT readiness	48	48	52
Human resources and labour market	71	37	47
Health and hygiene	3	7	6
Safety and security	99	72	58
Business environment	99	44	36
Environmental sustainability	124	91	99
Air transport infrastructure	82	76	71
Ground and port infrastructure	80	102	91
Tourist service infrastructure	87	81	97
Natural resources	120	111	92
Price competitiveness	73	49	8
Cultural resources and business travel	117	101	75
Rank	88/140	85 / 141	81 / 136
Score	3.8	3.5	3.6

Note - compiled by the author based on the source [2, 3, 4]

During the period covered by 3 reports on TTCI, the number of International tourist arrivals to Kazakhstan has increased, which led to the growth of international tourism inbound receipts.

According the Table, Kazakhstan has the weakest competitive positions in the following pillars:

- International openness (113)
- Environmental sustainability (99)
- Tourist service infrastructure (97)
- Prioritization of Travel and Tourism (93)
- Natural resources (92)
- Ground and port infrastructure (91)
- Cultural resources and business travel (75)
- Air transport infrastructure (71).

State support of tourism is a prerequisite for the sustainable development of the industry. International experience shows that active government policies aimed at creating conditions for the development of tourism infrastructure, attracting private investors, creating a regulatory legal framework that provides favorable economic conditions for the activities of tourism industry entities, allow the tourism industry to occupy an important place in the socio-economic development of the country [5].

Also, world experience suggests that countries that are actively developing tourism, devote significant budget funds to the implementation of national projects and programs, providing their citizens with tourist services of high quality.

The main reasons that impede the accelerated development of tourism in Kazakhstan include:

1) insufficient development of engineering, transport and social infrastructure in places of tourism, inaccessibility of tourist facilities, low level of service in tourist places, insufficient quantity and quality of service of objects of roadside infrastructure;

2) lack of qualified personnel in the field of tourism, including the academic nature of education, some isolation of educational programs from the requirements of the labor market, production needs, expectations of employers, etc.;

3) visa and migration formalities;

4) insufficient coordination of interested state bodies for the implementation of an integrated approach in the development of the tourism industry, including cultural and sports activities;

5) weak marketing and branding;

6) low investment attractiveness.

Analyzing the change in the main economic indicators of tourism development, we can conclude that the potential of Kazakhstan tourism is not fully realized, since the development of the tourism industry directly depends on the creation of a modern competitive tourist complex, including natural and climatic conditions, tourist attractions, necessary infrastructure.

The creation of a modern competitive tourist complex is able to make significant contribution to the development of the country's economy through tax revenues to the budget, the inflow of foreign currency, increasing the number of jobs, as well as ensuring control over the conservation and rational use of cultural and natural heritage.

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ҚАЗАҚСТАН РЕСПУБЛИКАСЫ ЭКОНОМИКАСЫНДАҒЫ ТУРИЗМНІҢ ОРНЫ ЖӘНЕ БӘСЕКЕ ҚАБІЛЕТТІЛІГІН ТАЛДАУ

Аннотация. Мақалада қазақстандық туризм саласында бәсекеге қабілеттіліктің қазіргіденгейі талданады. Саланың бәсекеге қабілеттілік деңгейін жоғарылату қажеттілігінің маңыздылығы ЖІӨ өсуіне ықпал етеді және Қазақстан Республикасында дамудың үлкен әлеуеті бар. Әлемде туристік бағыттардың көптеген бағыттары ашылууда, сонымен қатар, туризм индустриясындағы инвестицияның артуында орын алып, әлеуметтік-экономикалық дамуға жаңа жұмыс орындарын және кәсіпорындарды ашумен жылжытушы күштің кілті ретінде және экспорттың кірісін және инфрастрүктураның дамуына әсер етуде.

Соңғы он жылдықта әлемде туризм экономиканың ең ірі және тез өсетін секторына айналып, тұрақты өсіп және диверсификациялануда.

Қазақстан ерекше табиғи ресурстарға, мәдени мұраға, тарихи ескерткіштерге бай, соның ішінде Ұлы Жібек жолы тұсында орналасқан мәдени иелене отырып, халықаралық туристік нарыққа бірігуіне болады және жек дамуға тұрақты қарқынды аралас салалардың дамуына жетуге, Ұлттық экономикаға инвестицияның ағылуына алып келуіне болады. Ол үрдістің болуы үшін Отандық туризм индустриясының бәсекеге қабілеттілігінің деңгейін көтеруіміз қажет.

Түйін сөздер: туризм индустриясы, туризмнің бәсекеге қабілеттілігі, маркетинг, брендинг, инновация.

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**МЕСТО ТУРИЗМА В ЭКОНОМИКЕ РЕСПУБЛИКИ КАЗАХСТАН И АНАЛИЗ ЕГО
КОНКУРЕНТОСПОСОБНОСТИ**

Аннотация. В статье анализируется современный уровень конкурентоспособности в сфере туризма Казахстана. Индустрия туризма имеет большой потенциал развития в Республике Казахстан, способствуя росту ВВП, что определяет актуальность и необходимость повышения уровня ее конкурентоспособности. По всему миру открывается все больше туристических направлений, а также имеет место увеличение инвестиций в индустрию туризма, что превращает ее в ключевую движущую силу социально-экономического прогресса за счет создания новых рабочих мест и предприятий, увеличения экспортных доходов и развития инфраструктуры.

За последние шесть десятилетий мировой туризм продемонстрировал устойчивый рост и диверсификацию, став одним из крупнейших и наиболее быстрорастущих секторов экономики в мире.

Казахстан, обладая уникальным и природными ресурсами, культурным наследием, историческим и памятниками, в том числе расположенными вдоль Великого шелкового пути, может гармонично интегрироваться в международный туристический рынок и добиться его интенсивного развития, что обеспечит устойчивый рост занятости и развитие смежных отраслей, увеличение доходов и приток инвестиций в национальную экономику. Для реализации данного процесса необходимо повышать уровень конкурентоспособности отечественной индустрии туризма.

Ключевые слова: индустрия туризма, конкурентоспособность туризма, маркетинг, брендинг, инновации.

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