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Tourism industry of Kazakhstan: current state, problems and prospects of development in the conditions of COVID–19

Abstract

Object: The tourism industry of Kazakhstan in the context of the development of COVID–19.

Methods: The authors used methods of comparative analysis, methods of system analysis, methods of statistical processing of empirical data. The axiomatic method and the method of generalization and classification were taken as the basis of scientific research methods. The expert evaluation method was used as the analysis tool.

Results: The study revealed the problems of the development of the tourism industry in Kazakhstan, which have become limiting factors. Based on the results of the evaluation of data characterizing the infrastructural development of the tourism industry, the availability of personnel, investment potential the authors proposed mechanisms to enhance the development of business processes in the conditions of COVID–19.

Conclusions: The tourism industry of Kazakhstan is one of the priority areas for the economy of our state. Considering it, this industry carries a significant potential for development within not only our country but also beyond its borders, a large number of institutional instruments have been developed and accepted for execution by the state. Nevertheless, the tourism industry, despite the positive pace of development, still does not give a qualitative structural change. We can say that the number of tourists and industry entities is increasing, but the industry itself has not yet undergone qualitative development. Thus, based on the results of our research, we prove that the tourism industry requires not only a change in the basic infrastructure values but also a transition to a higher level of service. This should become a catalyst for the development of the tourism industry as a whole.

Keywords: tourism, economy, tourism business, COVID–19, tourism infrastructure, investments.

Introduction

The tourism industry of Kazakhstan has recently become one of those areas of the economy that carries a significant development potential. It is connected with the fact that the tourism industry relies on a multiplicative effect in its development: Having a large number of goals and objectives allows to involve literally all other sectors of the national economy in the work. Thus, the tourism industry itself is paramount, because it allows to give an impetus to the development of many other areas of the country's economy. At the same time, noting the current trends in the development of tourism not only in Kazakhstan, but also around the world. It can be noted that this sector of the economy is incurring significant losses. First of all, this is due to COVID-19, which has disrupted all business chains without exception.

As an analysis of the development of the tourism industry has shown, over the past 15-20 years, it has developed rapidly. According to some reports, the tourism industry has become one of the leading industries in terms of growth rates. As the forecast of the World Tourism Organization shows, by 2030, the number of tourist arrivals will be at least 1.36 billion people. More recently, the tourism industry accounted for about 10% of world GDP, and 6% of world exports. About 330 million people were employed in the tourism industry. At the same time, 1.5 more jobs were created indirectly for each workplace. (Travel & tourism economic impact 2019 world).

The new coronavirus pandemic and the strict anti-epidemic measures introduced by different countries have accelerated the transformation of world tourism. The industry is losing hundreds of billions of dollars and millions of jobs. At the same time, digital travel tech startups are entering the market, new opportunities for individual tours and formats of international cooperation are emerging. Experts of the Organization for

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Economic Co-operation and Development (OECD) are confident that the current crisis is an opportunity to create a more sustainable tourism economy.

Tourism itself has become one of the leading service industries on development topics over the past decade. It began to have a significant impact not only on individual countries, but also on the economy of many regions. For many countries, tourism is a system-forming factor of economic growth. It contributes to an increase in the volume of gross domestic product production, strengthening cross-country ties, and allows creating new jobs. Today, the tourism has a multiplicative effect. In some countries, it affects all sectors of the economy. This can include transport, communications, construction, maintenance service, agriculture, production of consumer goods and so on. However, for the successful development of tourism, the country also needs to have a number of other factors. These include demographic, natural, geographical, climatic, socio-cultural, historical, etc.

Kazakhstan is one of those countries in the world where the degree of tourism development is not yet high enough. Compared to the pace of development of the economy of Kazakhstan as a whole, tourism does not show good growth rates. This is especially evident with regard to inbound tourism. Nonetheless, Kazakhstan has a good tourist potential: the openness of the socio-cultural sphere, nature, historical and innovative potentials.

At the same time, a number of other factors have a negative impact on the development of tourism in Kazakhstan. One of these factors is the tourist infrastructure. The level and quality of its development is still low. If there are no problems with the elements of tourist infrastructure in large cities of Kazakhstan, then in small towns and rural areas this problem is relevant. The main problem remains the low level of investment activity of tourism entities. Infrastructure development requires a constant and significant flow of investments. Despite the fact that the tourism industry is one of the priority sectors of the development of the economy of Kazakhstan, the investment flow is still insufficient. It is concentrated in large settlements.

A negative factor in the development of international tourism in Kazakhstan is the low level of information activity of tourist operators. The imperfection of tax and tourism legislation has a bad impact on the development of tourism in Kazakhstan. In particular, there are no clear standards for the provision of tourist services, as well as requirements for accommodation elements that meet high international standards (Denisov I., et al, 2020).

If we consider the indicators of tourism development in Kazakhstan in recent years, it will show that outbound tourism is constantly developing, but not local and inbound. In addition to the above reasons regarding infrastructure, it is important that sometimes Kazakh travel companies are agents of foreign large companies (Daubaev K., et al, 2019). They are trying to promote external travel packages. Moreover, such packages have a large profitable value. Before the coronavirus pandemic, the main focus in their work was on outbound tourism. At the same time, there were situations when Kazakh travel companies did little work in the field of prevention of violations of foreign legislation, rules of conduct in another country, etc. The facts of violation of local legislation in the field of registration and accommodation of foreign tourists on the territory of Kazakhstan were also noted. According to the requirements, the tourist operator must provide a full package of related services: accommodation, registration, meeting and escort of foreign tourists. However, sometimes there were situations when domestic travel companies did not provide the required services in good quality. All this became a factor of inhibiting the development of tourism in Kazakhstan. Thus, tourism is an important sector of the economy of Kazakhstan. However, in recent years, there has been no qualitative growth. There is quantitative growth, but it does not give us the opportunity to say that tourism in Kazakhstan is moving to a new level of development. The coronavirus epidemic has largely changed the structure of the tourism industry, including in favor of domestic tourism. This can become a window of opportunity for the development of not only domestic tourism, but also inbound tourism.

Most travel companies are travel agents of foreign travel companies; this explains the predominance of the number of citizens of Kazakhstan traveling abroad on vacation over the number of foreign citizens visiting Kazakhstan. At the same time, the work of Kazakhstani tourist enterprises on prevention, instruction, explanation of existing legislation, rules of conduct adopted in the countries of visit is extremely poorly organized, which often leads to the fact that some tourists violate the laws of the host country (Daubaev K., et al., 2019).

Under the current regulatory framework, to control the regime of stay and ensure the personal and property security of foreigners, travel companies are obliged to inform the internal affairs bodies in advance of the place of the expected arrival of foreign citizens, about the duration of their stay, place of residence and routes of movement.

However, tourist organizations, which, in accordance with the legislation of the Republic of Kazakhstan, are responsible for foreigners' compliance with the rules of stay in the country, do not properly fulfill their duties. The meeting of foreign tourists at the points of arrival, their provision with accommodation and sightseeing services, registration at the place of residence in hotels or law enforcement agencies is not organized.

The list of data and other problems in the development of Kazakhstan tourism determines the relevance of the topic of this study, during which the author made an attempt to comprehensively analyze the features of tourism development in Kazakhstan and develop specific practical recommendations for its improvement.

Literature Review

Currently, tourism is the subject of many scientific studies and attracts the attention of specialists working in various fields – management, marketing, economics, culture. A comprehensive science is being formed, combining diverse studies of the tourism sector.

So, in the field of theoretical and methodological scientific research, a number of areas can be distinguished. The tourism industry, like other sectors of the economy, requires an effective management system. Such a system can be created at different levels. Both at the macro level and at the micro level. Therefore, scientific works in the field of the management system for the development of tourism within the framework of management are of interest. These authors include M.B. Birzhanov (2000), N.I. Kabushkin (2002), V.A. Kwartalnov (2002), Harris, G., Kennet, M.Kac (2021) and others.

A number of authors (V.N.Vukolov (1999), V.I.Ganopolsky (2014), etc.) have studied the tourism industry from the process side. The scientific interest of these authors is based on the very process of organizing a hiking trip. The theoretical and methodological provisions of its organization, the features of the process and its implementation, as well as risks and ways to reduce them are considered.

Due to the fact that the tourism industry is one of the most important economic spheres of many countries, some authors consider it as a socio-economic phenomenon. S.A.Shcherbakova (2006), Chan Phuong Mai (2017), Bernecker P. (1997), M.A.Morozov (2014), S.B.Boldyreva (2018), etc. assess the degree of influence of the tourism industry on the economy of individual territories and the state as a whole. These authors in their research substantiate the importance of the tourism industry as a locomotive of economic growth, and sometimes as a basis for cluster development of regions of a certain country.

A number of authors, including Kazakhstani ones, consider the tourism industry as an object of state administration. Such authors include E.Petrenko (2019), A.T. Tleuberdinov (2019), I.Kabirov (2016), A.M.Dauletova (2019), D.G.Mamraeva (2019), L.V.Tashenova (2020), etc. These authors tried to analyze the development of the tourism industry in the context of state policy. As a rule, studies have been conducted on systemic and institutional measures to support the tourism industry as one of the spheres of the state's economy.

Methods

To achieve analytical results, we used a number of methods: To substantiate the theoretical concepts and practical significance of the tourism business economy, we used a systematic and structural-functional analysis; when studying the statistical parameters of tourism business development in global and domestic conditions, we used systematic and comparative approaches.

The methods of expert opinion based on the results of processing indicators of the development of the tourism industry in Kazakhstan and abroad were used as an analysis tool.

Results

Infrastructure remains one of the most important factors limiting the development of tourism. Although in the conditions of the coronavirus pandemic, tourist flows have shifted to domestic tourism, the number and quality of infrastructure entities have changed little. The tourist infrastructure is an interdependent complex of elements that carry an industrial, social, recreational, cultural purpose. In general, researchers identify 2 large groups of infrastructure elements.

The first group is the elements of the hospitality system. It incorporates accommodation and catering companies.

The second group is the infrastructure component comprising three levels. The first level of the infrastructure component is a set of elements of the productive system. It includes existing buildings, structures, transport network, communications, insurance, energy, finance. These elements do not have a direct impact on the tourist product. However, without their qualitative development, it is impossible to provide tourist

services. The second and third levels of tourist infrastructure are directly enterprises and firms providing tourist services. The second level is organizations that can exist without the active participation of tourists, but have a greater potential for development in the tourist area. This may include catering enterprises, entertainment services, transport, museums and cinemas. The third group incorporates enterprises and organizations that directly provide tourist services. Thus, as our analysis shows, depending on the regions in Kazakhstan, there may be a failure in development at each of the three levels. In large cities, all three levels are well-developed. In rural areas, there may not be high-quality accommodation, food, transport and communication services. Also, tourists are faced with the problem of obtaining a high-quality integrated tourist product. This is often the main limiting factors of domestic and inbound tourism.

The tourism infrastructure is a significant part of the infrastructure complex of Kazakhstan. It has important functions:

- Security function. It lies in the fact that the provision of high-quality services requires the creation of the necessary conditions.

- Integration function. It carries the process of combining the activities of all participants in the creation of a tourist product.

- Regulation function. Tourism is important for regulating the economic potential of certain territories. For example, tourism can impact on the number of new jobs. It can influence the degree of development of related industries: transport, healthcare, culture, food, construction, etc. Thus, tourism has the function of regulating the development of the economy of territories. Therefore, we can say that the tourist infrastructure and the level of its development are an important component of the state's economy. This becomes relevant in the coronavirus pandemic when international tourism is not developing. Therefore, tourist flows are concentrated inside Kazakhstan. It is necessary to use this period for the development of domestic tourism.

The availability of placements all over the world plays a key role when choosing a destination for a trip. Their sufficiency and level of service significantly affect the volume of tourist flow both within the country and from outside.

According to the official statistics of the Bureau of National Statistics of the Agency for Strategic Development and Reforms of the Republic of Kazakhstan, the number of placements in Kazakhstan in 2020 amounted to 3,514 units (growth rate compared to the pre-COVID 2018 – 5.8%), in which there were 77.1 thousand rooms (growth rate compared to the pre-COVID 2018 – 7.3%), while the one-time capacity was 183.6 thousand beds (IFO – 108.9%) (Table 1). These indicators of the development of the tourism industry in Kazakhstan showed positive growth compared to the pre-pandemic period.

Table 1. Main indicators by locations of the Republic of Kazakhstan

	2018	2019	2020	2020/2018, in % growth
Number of placements, units	3 322	3 592	3 514	5,8
Number of rooms	71 858	75913	77 131	7,3
One-time capacity, beds	168 603	181 201	183 619	8,9
Provided a bed-day	9 602 762	10520133	5 679 651	-40,9
Served visitors by placements	5526864	6 266 563	3 581 340	-35,2
Occupancy of beds in %	23,2	20,7	17,3	-25
Average cost of a bed-day, tenge	7 990	7 504	8 500	6,4
The volume of provided services, in millions of tenge.	103948,30	120 527,20	66860,30	-35,7
<i>Note – compiled by the authors based on (Statistics Committee of the Republic of Kazakhstan. Tourism of the Republic of Kazakhstan.2016-2020 www.stat.gov.kz)</i>				

At the same time, the indicators characterizing the number of tourist services rendered in 2020 have significantly decreased. Beds were provided by 40.9% less, visitors were served by 35.2% less in accommodation places, occupancy of accommodation places decreased by 25%. The most illustrative example of the development of a crisis situation in the tourism industry is the volume of provided services. In 2020, it decreased by 35.7% with a pre-COVID period. It indicates that the average cost of a bed-day has increased by 6.4%.

The development of tourist infrastructure remains one of the most important factors limiting tourism (Table 2).

Table 2. Placements and their categories

Placement categories	2018	2019	2020	2020/2018, in % growth
Total	3 322	3 592	3 514	5,8
including:				
5 - star	23	24	26	13,0
4 - star	79	71	64	-19,0
3 - star	120	85	49	-59,2
2 - star	24	15	7	-70,8
1 - star	14	10	4	-71,4
without categories	1 753	1 890	1 936	10,4
other placements	1 309	1 497	1 428	9,1

Note - compiled by the authors based on (Statistics Committee of the Republic of Kazakhstan. Tourism of the Republic of Kazakhstan.2016-2020 www.stat.gov.kz)

As can be seen from Table 2, the total number of placements in 2020 increased by 5.8% compared to 2018. At the same time, the growth in the number of accommodation facilities fell only on elite, as well as on non-categorical and other placements. This suggests that the owners of the placements have adjusted their business model. As outbound tourism has significantly decreased due to the ban on international travel, tourists have begun to pay more attention to domestic accommodation facilities. However, because the creation of high-class accommodation facilities requires significantly more time and money, businessmen develop the lower price segment. Therefore, tourists began to buy cheaper permit places. This is confirmed by statistics. So, in 2018, the main share of visits fell on 3- and 4-star hotels (11.2 and 11.4 percentage points, respectively), as well as in places without categories – 39.5% of placements. In 2020, the share of star placements decreased by 9.4% on average, and the share of placements without categories, on the contrary, increased by 15.9%.

The decline in the pace of development of the tourism industry is also confirmed by direct indicators characterizing the number of tourists. According to statistics, the number of visitors for outbound tourism in 2020/2018 decreased by 73.1%. The number of visitors for inbound tourism in 2020/2018 decreased by 76.8% (Figure 1).

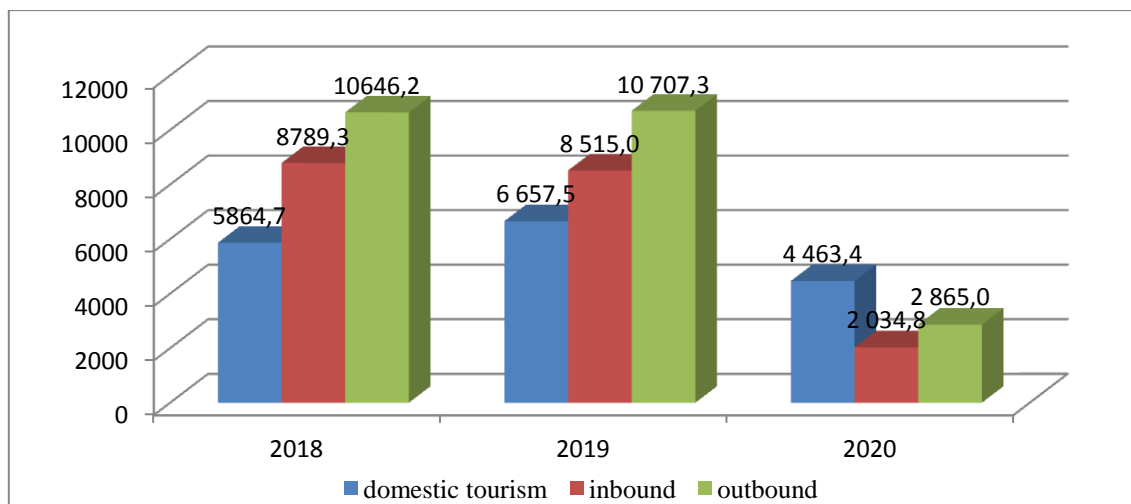


Figure 1. The number of visitors for inbound and outbound tourism, thousand people

Note - compiled by the authors based on (Statistics Committee of the Republic of Kazakhstan. Tourism of the Republic of Kazakhstan.2016-2020 www.stat.gov.kz)

Domestic tourism has decreased by only 23.8%. Bans on visiting places of accommodation and entertainment during the lockdown of spring-summer 2020 were of great importance. This trend was observed throughout 2020 all over the world, not only in Kazakhstan. According to the World Tourism Organization, in 2020, the number of international arrivals worldwide decreased by 74% compared to 2019 – from 1.5 million to 384 million. The losses in the tourism sector in 2020 are estimated at \$1.3 trillion.

The third problematic area of development of the tourism industry, which Kazakhstan has faced in the conditions of COVID–19, is the personnel issue.

According to a survey of members of the Kazakhstan Tourism Association (KTA), many tourist companies have closed their offices, reduced staff, personnel were sent on leave without payment. The trend of staff reduction began in April 2020. According to a survey conducted by the Association, about 9 thousand people were left without work at that time. From April to June 2020, this figure increased to 18 thousand people. Considering that not only workers but also their families suffered, about 60 thousand people were left without income. The most affected by the reduction in the volume of tourist services provided can be considered employees who carry out their professional activities in places of accommodation. In other positions, we can note an increase in the number of employees. However, many travel companies have not fired their employees, but only sent them on a long-term vacation. Thus, such employees are not reflected in the statistical accounting system as dismissed. They stopped carrying out their work activities, thereby remaining without wages (Table 3).

Table 3. The number of people employed in the tourism sector, thousand people.

The sphere of employment	2018	2019	2020	2020/2018, in % growth
Activities of tour operators, travel agents and other organizations providing services in the field of tourism	7,4	7,4	7,8	5,4
Provision of temporary accommodation services	29,2	30	26,3	-9,9
Activities of sanatorium-resort organizations	8	8,8	8,6	7,5
Activities for the organization of recreation, entertainment, culture and sports	74,9	75,4	75,3	0,5
<i>Note - compiled by the authors based on (Statistics Committee of the Republic of Kazakhstan. Tourism of the Republic of Kazakhstan.2016-2020 www.stat.gov.kz)</i>				

In the context of the COVID–19 pandemic, domestic travel companies began to take several measures that could compensate for the current losses. According to KTA, travel companies have refocused on domestic tourism, to open new destinations, such as “Sacred Turkistan”, “Mysterious Mangystau”, “Ice Volcano” in the Kegen district of Almaty region, as well as glaciers on Kapshagay. There is a great demand for beach tourism on Lake Alakol and independent hiking in the mountains of the Trans-Ili Alatau near Almaty.

The World Tourism Organization declared 2020 the Year of Tourism and Rural Development. Ecotourism already accounts for 25% of world tourism, 20% is the annual growth in the number of eco-tourists. According to the representatives of the KTA, this trend is actively developing in the republic, as ecological tourism with visits to specially protected areas (national parks, reserves, reserves, nature reserves) has become popular. In 2020, the state national parks of the Almaty region were visited by: Altyn-Emel – 9,798 people, Kolsay Lake – 83,153 people, Ile-Alatau – 212,218 people, Charyn – 16,105 people.

As stated by Global Competitiveness Index in the field of tourism and travel (T&T CompetitivenessIndex 2019 OverallRankings), Kazakhstan ranks 80th among countries such as Ukraine, Armenia, Namibia, Kenya. On the one hand, these countries are well-developed countries in the field of attracting tourists. On the other hand, if we consider this rating from the point of view of the position of Kazakhstan, then our country is in about the middle of the list of other countries. This suggests that the domestic tourism industry still needs to carry out comprehensive, including institutional, reforms. According to the results of the foresight conducted by DAMU RG in 2020, the tourism industry of Kazakhstan has a number of weaknesses that have a negative impact on the development of the industry as a whole. So, experts have identified the following problems of the tourism industry:

- high level of competition with the nearest countries;
- poor quality of the education system in the field of tourism and a shortage of highly qualified personnel;
- low level of investment attractiveness of the tourism industry;
- high possibility of natural disasters and the spread of disease foci;
- weak work in the field of promotion of the Kazakh tourist product to international markets and weak recognition of the Kazakh tourist product;
- imperfect visa and migration regime;
- low quality of service;
- low infrastructure development (Vechkinzova E. et al., 2021).

Thus, the development of the tourism industry in Kazakhstan carries systematic problems, most of which are of an institutional nature. COVID–19 pandemic has only exacerbated these problems.

Based on a survey of experts conducted by UNWTO, by the beginning of the summer season, the situation began to improve slightly. First of all, this is facilitated by widespread vaccination in many countries-suppliers of tourists, as well as digital green certificates that the European Union introduces for travelers. Nevertheless, 60% of experts expect the restoration of international tourism only in 2022, another 40% expect the beginning of growth in the industry in 2021.

To improve the investment climate of the tourism industry, the threshold for recognizing an investment project in the tourism sector as a priority has been lowered from 2 million MCI to 200 thousand, MCI, which makes it possible to obtain investment preferences. For example, investors are exempt from customs duties and value added tax on imports, from paying corporate income and land taxes for 10 years, and receive in-kind grants.

As the analysis of statistical data shows, over the past few years, the volume of investment in fixed assets has been growing. In 2020, the volume of direct investment in fixed assets amounted to 614.7 billion tenge. Compared to 2019, this figure increased by 30%.

At the same time, the investment activity of private investors in the top 10 tourist destinations is growing according to the adopted State Program.

82 investment projects worth 30.8 billion tenge were sent to the top 10 tourist destinations in 2019. In 2020, 92 investment projects worth 138.3 billion tenge were introduced. Since the beginning of 2021 36 projects worth 141 billion tenge were introduced. These figures show an increase in investment activity.

The types and possibilities of preferential financing instruments for the industry have become larger. The work of sanatoriums, accommodation facilities, cable car services were included in the list of priority state programs “Business Roadmap” and “Economy of Simple Things”. These indicators are included in the general classifier of economic activity of tourism.

Within the framework of the state program “Economy of Simple Things”, about 50 projects received funding. The total amount of financing is 22 billion tenge. The location of these projects is as follows: the cities of Turkistan and Aktau, the Medeu Regional Nature Park and the Ile-Alatau GNPP, Shchuchinsko-Borovskaya and Imantau-Shalkar resort areas, the shores of the lake. Alakol and Balkhash, Bayanaul, Almaty mountain cluster (Talgat, Enbekshikazakh, Uygur, Rayymbek, Karasai districts of Almaty region).

During the period of implementation of the Business Roadmap 2025 program, 120 projects worth more than 52 billion tenge received funding.

Today, the national tourist portal www.kazakhstan.travel.kz is continuously operating, which covers all significant objects of tourist interest with the provision of complete information in 8 languages (Kazakh, Russian, English, as well as French, German, Chinese, Arabic and Korean). In the tourist section, one can search for route, get useful information, inspiring articles about attractions, a calendar of events, etc. For business representatives, registers of travel agencies, tour guides, artisans were included with the ability to filter by region and type of tourism. It is also possible to search and purchase travel offers in the Marketplace section, and submit complaints about travel services in the Shagym section.

Discussions

In the world, the tourism was one of the dynamically developing industry. Before the coronavirus pandemic, there was an increase in tourism by 7–9% per year worldwide. In some countries, this figure was even higher. Under the conditions of the coronavirus quarantine, the growth rate of the tourism industry has significantly decreased.

These trends in the development of tourism are also inherent in Kazakhstan. The importance of the tourism industry for our country is recognized at the highest level. And in many strategic state program documents, the tourism industry is given great attention. The State Program for the Development of Tourism for 2019-2023 was developed. At the regional level, within the framework of this program, their own program documents were developed. Strategic growth points were identified. These include Zhana - Ile, Aktau City, Kapshagai. Mechanisms for attracting investors have been developed. The importance of the influence of tourism on the adjacent sectors of the economy of Kazakhstan is undeniable.

Describing the tourism of Kazakhstan, we can say that all the elements of the industry are present. There are roads, communications, accommodation facilities, tourist application facilities. But at present, the current state of tourism and related infrastructure is becoming a hindering factor in development. Despite the announced new points of application and creation of modern tourist products (Zhana-Ile, Kenderli, Aktau

City, etc.), tourists are faced with an almost complete lack of high-quality infrastructure. Today, new tourist centers are being created from scratch. As long as there is no high-quality and complete infrastructure, these new points of tourism will not become points of growth. A new comprehensive approach is required to stimulate tourism development at the state level.

According to the analysis of barriers to the development of tourism in Kazakhstan, there is a shortage of highly-qualified personnel. Despite the fact that specialists in the field of tourism are trained in educational institutions of the country, their level of qualification is low. The main problem remains the lack of practical experience. There is no opportunity to improve their skills in the regions. Knowledge of foreign legislation, foreign languages, management in the field of management of tourism business entities, etc. is required. Today, such training can be carried out by individual educational institutions.

There is also a factor of image attractiveness of Kazakhstan tourism. The tourist image is a whole complex of factors: Providing a high level of service, security, the quality of the associated infrastructure, the degree of development of the information base, and so on. This image has been created for many years. It is the result of the comprehensive work of the state and the subjects of the tourism business.

In general, for the development of tourism in Kazakhstan, it is necessary to solve 3 main tasks: Development of high-quality infrastructure, staffing and information support.

As our analysis has shown, the coronavirus pandemic has become one of the most important catalysts for infrastructure development. This is due to the fact that the subjects of the tourism business during the quarantine paid more attention to domestic tourism. There is an increase in placements and so on. At the same time, the problem of integrated infrastructure development and its qualitative development remain. For example, one can build rest houses on the lake. However, if they do not have any communication, electricity, roads, sewerage, then tourists will not come to these rest houses.

Therefore, the issue of developing high-quality tourist infrastructure is a joint issue of the state and entrepreneurs. To increase it, one can use different tools to stimulate entrepreneurial activity. For example, public-private partnerships, government contracts, outsourcing, etc.

Recently, a large number of tourists are interested in visiting western Kazakhstan. Here the main task is to create high-quality road infrastructure and places of accommodation. To do this, it is necessary to use the opportunities of cluster development and mechanisms of public-private partnership. It is also important on an ongoing basis on the part of the state to use the principle of phased development of tourism infrastructure.

The use of the principle of continuing education is essential for quality staffing. This education should be based on local tourism business practices. The training system itself can be divided into two groups. The first group is specialists in the field of creating and providing a tourist product. The main emphasis should be placed on the system of high-quality service. The second group of specialists is employees of related industries who create an additional product for the tourism industry.

Conclusions

With the transition to a post-industrial society in highly-developed countries, services are becoming important. The real economy sector is secondary in many countries. The service sector began to create a significant volume of products. Tourism is no exception. Its growth rate in recent years is significant. Tourism has a great multiplier effect. Kazakhstan's economy is not yet post-industrial. However, it is clear that the service sector will soon become an important area of economy in any case. Therefore, today it is necessary to create the necessary basis for quality growth. Tourism can become one of the important sectors of the economy.

Currently, the COVID-19 pandemic has a significant impact on tourism in all across the world, including Kazakhstan. For many countries of the world, COVID-19 has become a negative factor. The volume of tourist flows has sharply decreased. This negatively affected not only the tourism industry, but also related industries. A similar situation is also noted in Kazakhstan. The volume of exit and entry tourism has sharply decreased. Due to the fact that a significant part of domestic tourism operators provided services in the field of foreign tourism, they left the market. Nevertheless, COVID-19 provides an opportunity for the development of domestic tourism. Today, it is necessary to use this period to stimulate the development of domestic tourism. It requires a comprehensive work of the state and entrepreneurs. After the borders are opened, foreign tourist operators can return to the Kazakhstan market again. Domestic entities of the tourism business require protectionist measures to protect their interests. To do this, it is necessary to qualitatively increase the tourist service and its availability.

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Қазақстанның туристік саласы: COVID-19 жағдайындағы қазіргі сипаты, проблемалары және даму перспективалары

Аңдатпа

Мақсаты: COVID-19 даму жағдайындағы Қазақстанның туристік саласын зерттеу.

Әдісі: Қазақстанның туристік саласының дамуын зерттеу бойынша ғылыми жұмыс жүргізу барысында авторлар салыстырмалы талдау, жүйелік талдау әдістерін және эмпирикалық деректерді статистикалық өңдеу әдістерін қолданды. Зерттеудің ғылыми әдістерінің негізі ретінде аксиоматикалық әдіс және жалпылау мен жіктеу әдісі алынды. Сараптамалық бағалау әдісі талдау құралы ретінде пайдаланылған.

Қорытынды: Алынған зерттеу нәтижелері шектеуші факторларға айналған Қазақстанның туристік саласын дамыту проблемаларын анықтауға мүмкіндік береді. Туризм саласының инфрақұрылымдық дамуын, қызметкерлермен, инвестициялық әлеуетпен қамтамасыз етілуін сипаттайтын деректерді бағалау нәтижелері негізінде авторлар COVID-19 жағдайында іскерлік процестерді дамытуды жандандыру тетіктерін ұсынған.

Тұжырымдама: Қазақстанның туристік саласы мемлекетіміздің Қазақстан экономикасының басым бағыттарының бірі болып табылады. Бұл сала тек біздің еліміздің ғана емес, сонымен қатар одан тыс жерлерде де дамудың айтарлықтай әлеуетіне ие екенін түсіну үшін мемлекет тарапынан институционалдық сипаттағы көптеген құралдар әзірленді және қабылданды. Дегенмен, туризм саласы дамудың оң қарқынына қарамастан, әлі де сапалы құрылымдық өзгерістер беріп отырған жоқ. Туристер мен өнеркәсіп субъектілерінің саны артып келеді деп айтуға болады, бірақ саланың өзі сапалы дамудан өткен жоқ. Осылайша, зерттеу нәтижелеріне сүйене отырып, туризм саласына негізгі инфрақұрылымдық құндылықтарды өзгерту ғана емес, сонымен қатар қызмет көрсетудің жоғары деңгейіне көшу қажет екені дәлелденген. Бұл жалпы туризм саласын дамытудың катализаторына айналуға тиіс.

Кілт сөздер: туризм, экономика, туристік бизнес, COVID-19, туристік инфрақұрылым, инвестициялар.

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Туристическая отрасль Казахстана: современное состояние, проблемы и перспективы развития в условиях COVID-19

Аннотация

Цель: Туристическая отрасль Казахстана в условиях развития COVID-19.

Методы: В ходе проведения научной работы по изучению развития туристической отрасли Казахстан авторами были использованы методы сравнительного анализа, системного анализа и статистической обработки эмпирических данных. За основу научных методов исследования были взяты аксиоматический метод и метод обобщения и классификации. В качестве инструментов анализа использовали метод экспертной оценки.

Результаты: Полученные результаты исследования позволили выявить проблемы развития туристической отрасли Казахстан, которые стали ограничивающими факторами. На основе результатов оценки данных, характеризующих инфраструктурное развитие отрасли туризма, обеспеченность персоналом, инвестиционным потенциалом, авторами были предложены механизмы активизации развития деловых процессов в условиях COVID-19.

Выводы: Туристическая отрасль Казахстан является одной из приоритетных сфер экономики нашего государства. Понимание того, что данная отрасль несет в себе значительный потенциал развития в рамках не только нашей страны, но и за ее пределами, со стороны государства было разработано и принято к исполнению большое количество инструментов институционального характера. Тем не менее, отрасль туризма, несмотря на положительные темпы развития, все еще не дает качественного структурного изменения. Мы можем говорить о том, что количество туристов и субъектов отрасли увеличивается, но качественного развития сама отрасль пока не претерпела. Таким образом, на основе результатов нашего исследования, мы доказали, что отрасли туризма требуется не только изменение основных инфраструктурных значений, но и переход на более высокий уровень сервисного обслуживания. Это должно стать катализатором развития отрасли туризма, в целом.

Ключевые слова: туризм, экономика, туристический бизнес, COVID-19, туристическая инфраструктура, инвестиции.

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