



# Features of regional tourism and the development of its spiritual and historical aspects

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## Abstract

Nowadays the international market of tourist services is a great machine worth many billion-dollars and with fierce competition. Thus the priority is the definition of the tourist product, which is unique to Kazakhstan and its features will be in increasing demand. For the Republic of Kazakhstan the tourism industry is a top priority, and more attention is needed to focus on the development of inbound and domestic tourism, including the development of exciting itineraries developed for cultural, historical and recreational areas. The actuality of research was motivated by the fact that in the economy of Kazakhstan, tourism is considered to be one of the most powerful factors that allows the economy to develop, supports the introduction of new technologies, and to an extent helps in the solving of a myriad of problems in society. The development of the spiritual and educational spheres, and the preservation and efficient using of cultural heritage has a particular significance for the history and culture of the region.

**Keywords:** regional tourism, spiritual tourism, cultural tourism, historical tourism, Kazakhstan

## Introduction

The impact of tourism on the region of Kazakhstan is through the economic functions of tourism inter alia recreation, employment, creation of income, and leveling the balance of payments. Economic activity in tourism has contributed to the growth of the economy. The tourism multiplier is defined as the ratio of changes in key economic indicators (production, employment or income) to changes in tourist spending and is important because:

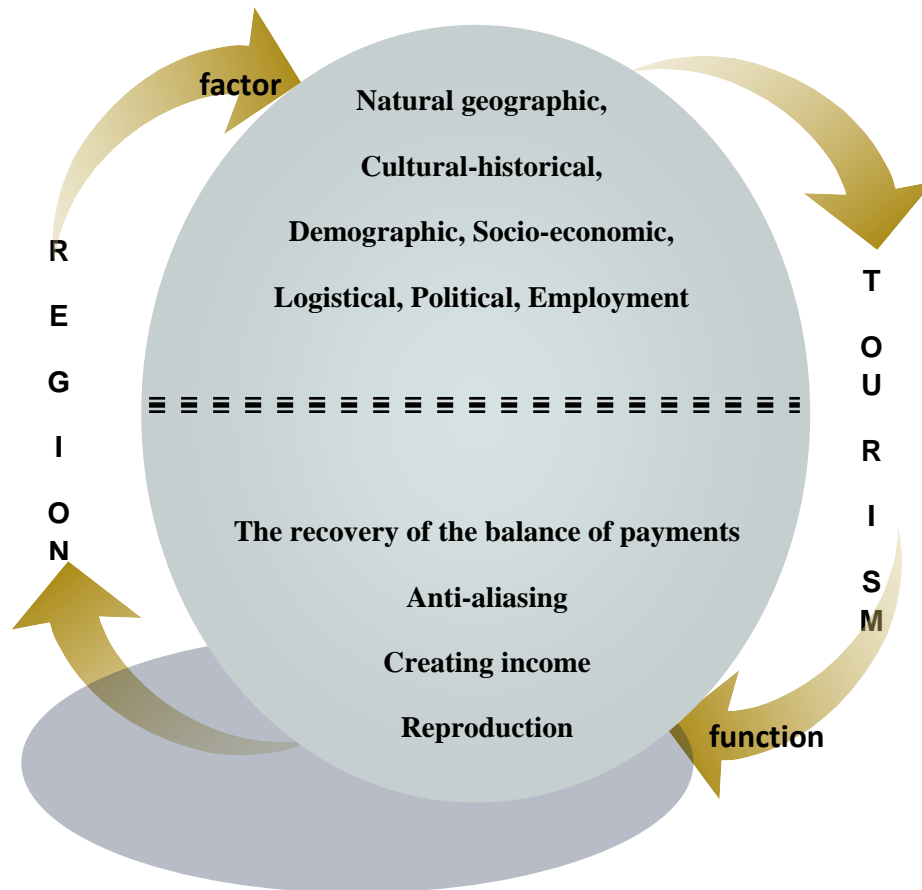
- the income multiplier shows the additional income (wages, fees, rents, profits etc.) resulting from the growth in tourist spending;
- a sales multiplier measures the additional turnover (gross revenue) of tourism enterprises due to the increase in tourist spending;
- the multiplier output determines the amount of additional products or services produced by increasing tourist spending.

The principal difference of the multiplier and sales multiplier output is that the multiplier output determines the change of the amount released, but not necessarily sales. When calculating, the multiplier of sales is necessary to consider that the majority of sales may be "inventory". Therefore, the size of the multiplier output can be more (part of the production remains in the reporting period on the "warehouses") or less (reduce stocks) multiplier sales;

- the employment multiplier is defined as the total number of additional jobs created due to the increase of tourist spending, or the ratio of the number of jobs creating additional costs, to the total number of jobs in the tourism industry. The calculation of this multiplier is the most complex because of the widespread seasonal and part-time employment in the tourism industry;

– the investment multiplier is defined as the impact of capital on total income. Increased investment in tourism influences the economy of the region, as it consistently affects many sectors of the regional economy (Kvartalnov, 2002).

The impact of tourism on the stabilization of the balance of payments of the region is carried out through the function of leveling the balance of payments, which includes the costs of local tourists travelling beyond the region, as opposed to the income received from the consumption of goods and services arriving into the region by tourists.



**Figure 1.** The mutual influence of the functions of tourism and regional development factors (Roemheld, 1990)

The region, in turn, also has an impact on tourism through the following factors:

- Natural geographic (nature, climate, terrain, etc.);
- Cultural and historical (monuments of architecture, history, etc.);
- Demographics (age of the population of the region, increasing number of working women, the growing proportion of single people);



- Socio-economic aspects (increase of the level of education, culture, the aesthetic needs of the population, changing patterns of free time);
- Material and technical aspects (infrastructure – transport, accommodation, catering, recreational areas, retail, etc.);
- Political aspects (regional stability, economic and financial situation, the level of safety of travel in the region). For example in 1992-1993 Egypt had experienced a significant downturn in the flow of Western tourists (17 %) because of widespread terrorist attacks of the Islamic activists. In order to convince tourists to return, the government had decided on about a 14-fold increase in the tourism budget (Roemheld, 1990).

Thus, tourism and the territory on which it develops, mutual influent on each other, interdependent and complementary (Figure 1).

Possibilities of tourism development and the fullness of the exercise of its functions connected with the concept of "tourism resources", include natural and built features that create interest and motivation for the journey. Theoretically then, any object can be interesting in some way or another to tourists and is able to be used to meet their diverse objectives and therefore can be considered as a tourism resource.

Each region as a potential area for tourism development has real features and differences in tourist resources and infrastructure, economic development and foreign trade activities, the mentality and the needs of the population, demographic and migration processes, etc. Therefore, the basis of the regional policy of tourism should be based on the specific regions in a nationwide structure, according to levels of development of local self-government, problems of protection and restoration of natural, historical and cultural tourism resources.

The region represents a unit of communication processes of development and reproduction, and this unit in which the process of historical development activity should "lock" on to stabilise structures of reproduction of human life, cultural forms, natural and labor resources, material life and production and so on (Hunter, 1992). The framework of the European school region is interpreted as "over the term", according to L. Roemheld, such basic features exist as: shared (defined) territory; a defined population; a common history of natural conditions and ways in which to solve problems (Fayol, 1989).

Being a multi-complex industry, tourism is directly linked with a large number of sectors of the regional economy, therefore, from our point of view, the concept of "regional tourism" should be considered in three aspects: geographical, socio-economic and environmental. The geographical aspect reflects the spatial distribution of recreational resources recreational needs of the local population and the degree of satisfaction in their specific region, but also opportunities for attracting foreign tourist flows on the territory.

The socio-economic dimension aids the level of recreational development of the region, contributing to its place on the domestic and global tourism market, as well as factors promoting or hindering the development of tourism.

The UNWTO definition is as follows, a "tourist region is the territory of having a large network of facilities and services required for recreation or rehabilitation" (Zorin, Kaverina & Kvartalnov, 2001). It follows that a tourist region, in order to be considered independent, must have a broad infrastructure for the accommodating of tourists, i.e. the tourist region must have tourist facilities and services, which are selected by and acquired by the tourist for the duration of their visit.

### **The measuring of the spiritual tourism in South Kazakhstan**

The territory of Kazakhstan is divided into regions such as South, North, West, East and Central, and each of these has a great tourist potential with historical sites, attractive landscapes, natural reserves, unique lakes and monuments. South Kazakhstan includes



Almaty, Zhambyl, South Kazakhstan and Kyzylorda oblasts. The climate in the southern region is ideal for relaxation, cure and mountain climbing, skiing and hunting. In addition, this region is a region of ancient culture. The largest city of the region is Shymkent covering "the sacred land" in the medieval Sairam district, the Arystanbab, the sacred place of worship, and the famous mausoleum of Kodja Ahmet Yassawi in ancient Turkestan. Taraz, is also important and the main sights there are the mausoleums of Aisha Bibi, Karakhan and Tekturmas, which is one of the centers of the Great Silk Road. South Kazakhstan is also famous for its Baikonur cosmodrome from which numerous Soviet era cosmonauts were launched into space. Regarding the unique natural resources, the Khan Tengri peak, the highest mountain peak in the world, is located in this region. The popularity of the peak is associated with the fact that it becomes red when the sun rises and sets.

One of the most beautiful resort areas is Medeu which is located 15 km from Almaty. Medeu is famous for its mild climate, beautiful mountains and sports facilities. It has the biggest ice skating rink. Total area of ice area is 10,5 thousand metres square; several world records of skating speeds were set here recently. Shymbulak, at a height of 2,200 m, is the second most popular ski resort near Almaty and is considered as one of the best places in Central Asia (Approved by the decree of the President of the Republic of Kazakhstan 2010). The concept of tourism development in the Republic of Kazakhstan provides for the creation of five clusters in Kazakhstan. They are: Astana, Almaty, East Kazakhstan, West Kazakhstan and South Kazakhstan.

Astana is a cluster covering Astana, the Akmola region, the south-western part of the North Kazakhstan region, the western part of the Pavlodar region and the northeastern part of the Karaganda region. Astana is an important cluster center for raising tourist interest.

The territory of Astana and Borovoe resort is the center of a nomadic culture and Great Steppe. Tourism or business tourism, cultural tourism and travel, holidays in mountains and lakes refer to the main tourist product, and MICE (Meetings, Incentives, Conferences, Exhibitions). Almaty is a cluster covering Almaty city and part of the Almaty region. Almaty is a cluster center boosting tourism interest.

Almaty will be confirmed as the center of International Mountain business and ski tourism, and a cluster of "City and Mountain Entertainment". The main tourist product, MICE is a tourism or business tourism, cultural tourism and travel, holidays in mountains and lakes and short-term vacations.

East Kazakhstan, in its turn, covers the northern and eastern parts of the East Kazakhstan region. Ust-Kamenogorsk is a cluster center that boosts tourist interest. The East Kazakhstan cluster is the center of development of ecological tourism and stabilized as the 'Mysterious world of nature'. The main tourist product is active tourism and adventure tourism, holidays in mountains and lakes.

West Kazakhstan is a cluster covering all of the Mangistau region and a part of West Kazakhstan Oblast. The city of Aktau is a cluster center boosting tourist interest. West-Kazakhstan cluster will be stabilized as the "Caspian Riviera". The main tourist product is beach tourism, cultural tourism and travel.

The creation of a modern tourist infrastructure "Western Europe - Western China International Transit Corridor" is the creation of the "border gate" of the republic in accordance with the western and eastern requirements connecting the specificity of tourism facilities in the region.

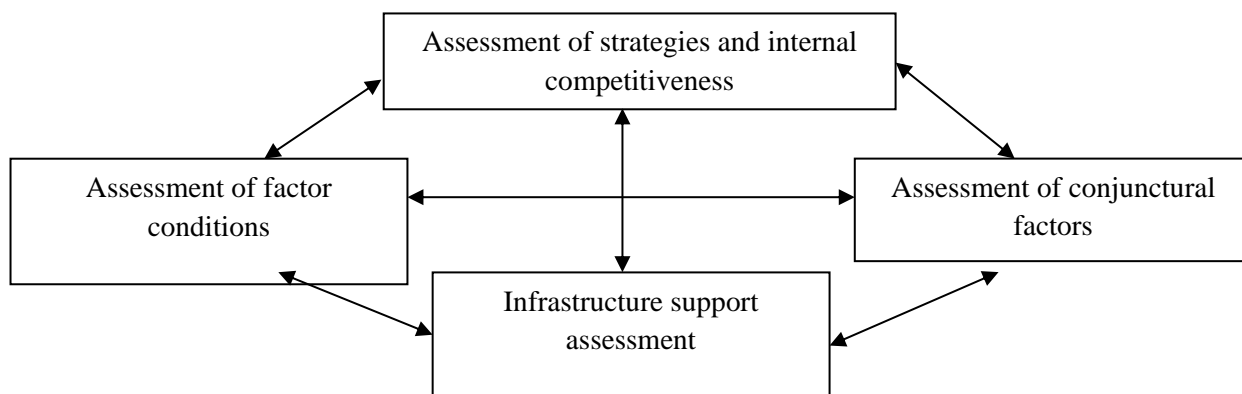
The South-Kazakhstan cluster includes the central and eastern parts of the Kyzylorda region, the South-Kazakhstan region and the southwestern part of Zhambyl oblast. As a center of this cluster Shymkent which is a key to tourist interest. The South-Kazakhstan cluster is clearly

based as the Great Silk Road. The tourist product in the region includes cultural and historical tourism trips (Kuralbayev, Aubakirova & Sevim, 2016). Mechanisms for the implementation of the national tourism policy should be considered at the establishment of targeted tourism development programs both at the national level and at the individual level (Kuralbayev, 2017). Certainly, at present, tourism has a lot of negative sides which could adversely affect it like for instance, the globalization process. It is worth noting that environmental issues in the tourist areas (pollution of natural complex and water reservoirs), social (uneven employment, prostitution and drug addiction), economic (loss of national economy) and many other issues are emerging. However, it should be noted that tourism is only a system that can effectively propagate human values. Tourism combines different worlds and promotes their free development (Kuralbaev, Dandaeva & Baibosynova, 2017). The main emphasis is laid on the regional tourism competitiveness in implementing organizational and economic mechanisms for tourism development in the region (Kuralbaev, 2015).

Various methodological approaches can be applied to assess the tourism competitiveness in the region. The choice of specific methodology depends on the nature and peculiarities of the object being evaluated (e.g. the whole regional tourism complex, local tourist center, individual tourist product, etc. can be an assessment object). Most commonly applied techniques of competitiveness assessment are generally based on expert or analytical methods of analysis. For our part, using Michael Porter's "competitive rhomb" model (the model of competitiveness determinants) is most advantageous as the whole regional tourist complex is an object of assessment. The table of competitiveness assessment is shown in Figure 3. The assessment was carried out in accordance with four determinants of competitiveness:

- *Assessment of factoring situations* (development level of production factors - tourist-recreational resources, labor resources, tourism infrastructure, capital and investments);
- *Assessment of conjunctural factors* (size and potential of the consumer market, key features of the market, peculiarities of estimating existing inter-sectoral standards);
- *Assessment of strategies and internal competition* (the structure, features and efficiency of the regional system of strategic management of tourism, the combination degree of regional, municipal and corporate strategies in tourism, and accompanying types of activities, competition level in the domestic market);
- *Assessment of infrastructure support* (development of subsidiary industries and economic service types, subsidiary and accompanying infrastructure, services provided by these sectors).

Based on the competitiveness assessment results, the competitive tendencies, which should be based on the creation of competitive and highly successful tourism products and regional tourism brands as well as the weakest potential competition that would significantly abstain from other regions and countries, were identified. The assessment findings suggest a set of measures aimed at strengthening these principles, or their neutralization at the expense of a particular use of existing competitive advantages.



**Figure 3.** Schedule of competitiveness assessment of the tourist complex in the region by M. Porter's "competitive rhomb" model (Porter, 2005).





Based on the assessment results, the possibility of creating *artificial competitive features* included on the basis of the formation of a pricing chain in the region and competitive tourism brands was determined. Artificial competition features are formed based on the existing natural competitive features.

### Factor conditions

Factor conditions are the provision level of production with factors and their condition. Production factors in tourism include objects and labor tools, i.e. resources, tourist demonstration objects and tourism infrastructure objects (Kuralbayev & Askarov, 2016). We take a closer look at them below:

- tourist and recreational resources including historical and cultural monuments, natural monuments and protected natural territories, monuments and historic sites, thermal treatment resorts and resort forests (1<sup>st</sup> group forest), events (folklore, national holidays and events).
- Human resources (qualitative and quantitative composition), qualification level of labor resources and opportunities for training and retraining for the tourism industry and tourism infrastructure enterprises.
- The main production assets (MPA) of tourism companies and tourism infrastructure enterprises, the provision of MPA, the condition of MPA, stock returns and depreciation rate of MPA.
- Providing investment resources, presence of investment platforms and investment projects in the region and in the country, the satisfaction level of investment needs and provision of working capital for tourism business objects.

**Table 1** - Description of the Factor conditions of Development of Spiritual-Historical Tourism in the Southern Kazakhstan (A complete list of sacred sites and complexes of Kazakhstan at the national level)

Factors 1	Description 2
Spiritual and historical recreational resources	<p>In South Kazakhstan region:</p> <ul style="list-style-type: none"> <li>- there are seven highly valued natural heritage monuments. They are: <i>Kazygurt mountain</i> complex, <i>Zhylygan-Ata</i> spring and cave, <i>Akmeshit</i> cave, <i>Khan Tengri mountains</i>, <i>Tamshybulak</i> spring.</li> <li>- There are fifteen unique archeological monuments and medieval urban centers. They include: <i>Tanbaly (Tamgaly)</i> stone archeological complex, <i>Boralday</i>, <i>Esik historical and archaeological</i> complexes, <i>Chirik-Rabat</i> town, <i>Otyrar</i> town, <i>Taraz</i> town, <i>Yassi (Kultobe, Turkestan)</i>, <i>Zhankent</i> town, <i>Sozak</i> town.</li> <li>- There are nineteen unique religious and religious sites. They are: Mausoleum of <i>Ukash Ata</i>, <i>Korkyt Ata</i> memorial complex, <i>Begim Ana</i> tower, <i>Baba Tukti Shashty</i> Mausoleum, Mausoleums of <i>Aisha Bibi</i> and <i>Babadzha Khatun</i>, <i>Ibrahim Ata</i>, <i>Karashash Ana</i>, Mausoleum of <i>Gaukhar Ana</i>, <i>Baydibek Biy</i>, <i>Domalak Ana</i> Mausoleum, <i>Ismail Ata</i> Architectural Complex, Mausoleum of <i>Korassan Ata</i>, <i>Tolegetai-Kylyshly Ata</i> Complex, Historical and Cultural Complex of "<i>Aziret Sultan</i>", Mausoleum of <i>Arystan-Baba</i>, Mausoleum of <i>Karakhan</i>, <i>Tekturmas</i> Complex, Mausoleum of <i>Karabura</i>, Mausoleum of <i>Okshy Ata</i>, <i>Zharkent Mosque</i>, <i>Appak-Ishan Mosque</i>, <i>Voznesensk Cathedral Church</i>, <i>Christ the Savior Church</i>.</li> <li>- There are six special places in connection with the sacred sites of 10 historic figures and sacred places connected with political and historical events.</li> <li>- Seventy four cultural facilities including museums, theaters, exhibitions. Health resorts, resorts are 149. There are 20 mineral and mineralized waters in the South Kazakhstan area (18 fresh, mineralized and 2 mineral). About 50% of the whole country's forest resources are forests of recreational significance referred to the 1st group.</li> </ul>
Labour resources	<p>There are 3117.1 thousand people in the region with labor potential. 2962.2 thousand people are employed in the economy. 33.4% of the population are in Almaty region, 38.8% in South Kazakhstan oblast, 16.8% in Zhambyl and 11% in the Kyzylorda region. Unemployment rate comprises 4.8% in Almaty region, 4.9% in Zhambyl and Kyzylorda regions and 5.2% in South Kazakhstan region. In the South Kazakhstan more than 2.5 thousand people are employed in the tourism industry. The existing contradictions</p>



	between the individual layout system and the modern economy structure during the industrialization lead to social strain on individual territories. Reduction and aging of rural population are observed. At the same time, the voluntary work potential of the rural areas in the region is not activated, for which tourism remains the most effective branch of sustainable or alternative employment.
The main production assets	In the tourism industry, real estate objects (tourist infrastructure - hotels and specialized installation instruments, road network, shopping mall, etc.), equipment and technical means (transport park and rolling stock, tourist equipment, technicians) refer to the main production assets (MPA). At present, MPA of the tourism and hotel companies are distinguished by a better situation than the economy in general. Average depreciation is not more than 20%. The situation is more complicated with housing communal services (HCS) and MPA, which are under the control of municipal hotels. In some cases depreciation of these facilities is more than 60%. There are also issues related to attracting investments in the expansion and upgrading of MPA of tourism companies.
Investment resources and capital	The investment potential of tourist companies in the Southern Kazakhstan is currently increasing. In 2016, 63 tourist infrastructure facilities were launched and 1,7 billion tenge investment was attracted. The number of tourist facilities increased by 4.1% compared to 2015. Within the framework of "Business Road Map – 2020", 10 projects were approved for tourist facilities in the region with a loan portfolio of more than 630 million tenge. For example, the health complex "Premium Spa Resort" has been launched in Uigur district, in the Alakol district, there is a family recreation center "DemAlakol" and 3 recreation zones, a children's health complex in Kapchagai and others. 118 tourist routes were developed in the region, 400 tourist companies were included in the state register.
Note – (Statistics Department of the Zhambyl region 2015, Statistics Department of the Almaty region 2015, Statistics Department of the South Kazakhstan region 2016) were compiled by the author through information sources	

Table 1 presents the factors of the development and functioning of the spiritual and historical tourist complex in South Kazakhstan. Today, there is no established management system that has been found to be the main problem of tourism development at the regional level. Tourism, in its turn, would be one of the most promising directions in the development of regional economics if tourist service management process were organized more effectively. The gross regional product in the cluster territory and its regional per capita regional product are important in the regional tourism development in the Republic of Kazakhstan (Table 2, 3).

**Table 2.** Gross regional product in the South-Kazakhstan region, billion tenge

Regions	2011	2012	2013	2014	2015	2016
The Almaty region	1236,6	1447,7	1741,9	1910,3	1976,0	1617,6
The Zhambyl region	633,6	760,4	876,7	979,6	1014,5	1182,7
The Kyzylorda region	1139,1	1269,9	1454,0	1380,1	1164,8	1308,3
The South Kazakhstan region	1512,5	1868,7	2141,4	2398,7	2508,3	2789,2
Note – (Statistics Department of the Zhambyl region 2015, Statistics Department of the Almaty region 2015, Statistics Department of the South Kazakhstan region 2016) were compiled by the author through information sources						

Table 2 shows an annual rise of the gross regional product in South Kazakhstan. Particularly, in 2016, the gross regional product in South Kazakhstan and the Almaty regions is two times more than it was indicated as in 2011.

**Table 3.** Gross regional products per capita in South Kazakhstan, thousand tenge

Regions	2011	2012	2013	2014	2015	2016
Almaty region	654	751	886,2	1002,1	1021,3	824,7
Zhambyl region	602,8	715,4	813,9	897,4	918,3	1060,5
Kyzylorda region	1611,9	1764,4	1983,0	1848,9	1534,3	1692,2
South Kazakhstan region	583	705,1	791,3	868,9	891,1	968,9
Note – (Statistics Department of the Zhambyl region 2015, Statistics Department of the Almaty region 2015, Statistics Department of the South Kazakhstan region 2016) were compiled by the author through information sources						



As can be seen in Table 3, the gross regional product per capita is higher in Zhambyl and Kyzylorda regions. This fact is due to the presence of a small number of residents in the two regions.

### Conjunctural factors

Conjunctural factors include both the internal and external market conjuncture features, existing opportunities and restrictions for the improvement and implementation of Kazakhstani tourism products in the markets. Assessment of conjunctural factors including:

- the volume of services implementation and the number of tourists;
- Structure of tourist flow and description of target markets;
- Description of services implementation and prices formation in markets;

The brief description of the tourism conjunctural factors in the Southern Kazakhstan is presented in Table 4.

**Table 4.** Description of tourism development conjunctural factors

Factors	Description
1	2
Realization volume of tourist and subsidiary services	The volume of (hotels) accommodation services in the implementation of tourist-excursion services in Southern Kazakhstan comprises 9298,7 million tenge. Compared to tourist and recreational and hotel services, the share of subsidiary services is estimated at approximately 87% of total revenues. In 2016, the total amount of income from tourism in South Kazakhstan was 11.1 billion tenge (taking into account the multiplicative result). The share of tourism and subsidiary services implementation in tourism is equal to 1.2% of the republic's GRP. Using all tourism potential will allow increasing tourism share by 20% or more.
The power and structure of the tourist flow	In 2016, total number of visitors in South Kazakhstan makes 1774015 thousand people. The structure of the tourist flow is as follows: about 71% are citizens of CIS member states, 29% are of foreign countries. Tourism flow prospects in the region depend on the increase in the current flow of tourists from the CIS countries and the increase in the share of tourists from far-abroad countries (due to the access of Kazakhstani tourism products and travel agencies to international corporate networks). The share of tourists visiting the spiritual and historical tourism is 24.8%. In 2016, this figure was estimated by 1 million people.
Peculiarities of services implementation and prices formation in markets	That is why the main income from tourism remains outside of South Kazakhstan. In South Kazakhstan, the main tours are implemented through the CIS countries and foreign travel agencies. However, as a rule, up to 70% of all South-Kazakhstan tourism flows come from outside the region and through the tours implemented by foreign travel companies. Therefore, the main income from tourism remains outside of South Kazakhstan. External companies use South-Kazakhstan companies only to organize their tours to the spiritual, historical and cultural sites. Electronic and web marketing opportunities allowing to sell major volumes of tours online are used very poorly. Tracking tour production promotion channel depends only on the development of conditional specialization in tourism and franchising, connecting regional tourism firms and tour operators to external corporate networks as well as web-marketing development.
Restrictions on tourism development	Significant limitations on the development of different kinds and forms of tourism: <ul style="list-style-type: none"> <li>- legal limitations (foreign trade restrictions and migration policy restrictions, disadvantages of land laws connected with the complex structure of transferring land from one category to another, preparation of project-building documentation and allocation of investment sites for construction)</li> <li>- technical and technological constraints (inadequacy of airport buildings with international standards, poor quality and unsatisfactory condition of roads, differences in standards of cellular networks, non-certification of deployment tools, non-development of additional infrastructure - ATMs, rental units etc.)</li> <li>- Limitations associated with a low safety level of tourists and high criminogenicity</li> <li>- informational limitations (low information availability, lack of quality and accurate information on tours, products and infrastructure, lack of road signs and information boards, lack of navigational information).</li> </ul>
Note – (Statistics Department of the Zhambyl region 2015, Statistics Department of the Almaty region 2015, Statistics Department of the South Kazakhstan region 2016) were compiled by the author through information sources	





## Strategies and internal competition

The coherence of regional, municipal and corporate strategies, the presence and effectiveness of the strategic management system and state regulation policies to support tourism development in the region as well as the scale and level of domestic competition in tourism are evaluated. Here, the assessment for connecting business entities and tourist projects to international and interregional networks in the tourism industry is also given.

The assessment includes the following elements:

- Availability of a strategic management system for tourism development in the region and the descriptions and compatibility of individual strategic documents;
- Efficiency of state and regional investment policy measures in tourism and tourism infrastructure development;
- Presence and functioning of organizational and social structures (councils, associations, own government partners, funds, etc.) in the sphere of decision-making and coordination in the field of tourism;
- A combination of regional and corporate strategies in the tourism industry;
- the domestic competition level of a region in the tourist market;
- Connection to external corporate networks, dependence on external corporate and regional strategies and solutions.

The following table presents the strategy of regional tourism development and domestic competitiveness promotion in South Kazakhstan (Table 5)

**Table 5.** Strategic characterization of domestic competitiveness and tourism development

Factors	Description
Strategic management system of tourism development	In the region, programs on strategic management of tourism development have been developed. They are: About tourist services in the Republic of Kazakhstan. Law No. 211 "Typical Structure of Local State Management Authorities" of the Republic of Kazakhstan dated June 13, 2001, Resolution No. 1022 of the Government of the Republic of Kazakhstan dated October 4, 2004, Conception of Tourism Industry Development in the Republic of Kazakhstan till 2020. Resolution No. 508 of The Government of the Republic of Kazakhstan dated May 19, 2014, Cultural Heritage Program, 2008, Concepts of Development as Historical and Cultural and Tourist Centers in Regions, Strategic Development Programs of Republic and Regional Tourism, Investment Attraction projects in Development and Modernization of Tourism Complexes, Independent Expert Commission System. These systems will allow to carry out stages as a strategic priority with a real impact on tourism development.
Effectiveness of regional investment policy implementation in tourism	In recent years, South Kazakhstan has seen an increase in investment in tourism infrastructure. In 2016, 63 tourist infrastructure facilities were launched and 1.7 billion tenge were invested in their construction. The number of tourist facilities increased by 4.1% compared to 2015. The volume of attracted investments in the region amounted to 1341.3 billion tenge.
Communication with the outside world and internal competitiveness	The investment potential of tourist companies in the Southern Kazakhstan area is currently increasing. At present, 771 tourist companies operate in South Kazakhstan. They are mainly small and medium-sized businesses. To attract external investment funds, small business representatives should be connected to the corporate network. And in its turn, it has developed very poorly.
Note – (The Ministry of National Economy of the Republic of Kazakhstan Committee on Statistics 2016-2017) were compiled by the author through information sources	

Infrastructure development. In the South Kazakhstan region, the development degree of a tourist and subsidiary infrastructure, offered services quality and the availability of unified infrastructural tourism complexes providing a full set of services are assessed below. The key elements of the infrastructure development of tourism development in the region are:



- the means of tourists accommodation, numbered fund power, the condition and the quality of offered services;
- public catering enterprises, their development level, types of enterprises, level and quality of services;
- field of tourist trade services, trade service forms (including the development level of modern trade enterprises forms), offered service quality and assortment;
- Tourists transportation service and transfer, the development level of transport infrastructure and its condition, availability of specialized enterprises and rolling stock, offered services quality;
- additional paid services for visitors, including leisure and recreational facilities, lease of equipment and transportation means, development of cash-settlement and insurance activities, home services, quality and availability of offered services;
- Sanatorium and resort and preventive services, presence and condition of thermal resources, capacity of sanatorium-resort institutions, their efficiency, quality of offered services (Table 6).

**Table 6.** Infrastructural characteristics of tourism development in South Kazakhstan

Factors	Characteristics
Tourists accommodation possibility	There are 22862 tourists that can be catered for accommodation wise according to tourist accommodation in the region. The simultaneous accommodation is 28289. 35% of the total number of accommodation is not favorable, and 45% is standard and 20% is a "suite". According to region statistics, in recent years the number of hotel enterprises has increased. Also many hotels in the region did not meet international standards of accommodation.
Public catering industry	Public catering is realized by canteens, cafes, bars, hotels. An annual income from public catering is over 5 billion tenge. In public catering places are accompanied by accommodation. However, the catering quality at hotels has not yet reached a high level.
Trade services sector	Trading services (mainly self-service stores) are implemented by 475693 businesses in different areas of the region. According to the data of 2016, retail sales in the region amounted to 1254519.2 million tenge, while foreign trade amounted to \$ 3766.5 million. The possibility of non-cash payment in the trading sector is still underdeveloped.
Transport and transport services	Considering to the transportation connection, airline, railroad and road transportations have been formed in the region. The total number of highways is 85%. The region is located close to neighboring Uzbekistan, Kyrgyzstan and China. As South Kazakhstan is located on the "Great Silk Road", 55% of it belongs to passing trucks and non-resident tourists traveling through the territory of the region.
An additional paid service	Additional paid services in the region include cultural, historical and entertainment establishments (museums, cinemas, concert and exhibition halls, nightclubs, etc.), sports facilities, banks, insurance services, cash-settlement points. According to the statistical data for 2016, there were 74 cultural objects including museums, theaters and exhibitions. The number of recreation health resorts comprised 149 units. There are 245 cinemas, about 2300 sports complexes, over 20 Kazakhstani and foreign banks and more than 800 ATMs.
Note – (Statistics Department of the Zhambyl region 2015, Statistics Department of the Almaty region 2015, Statistics Department of the South Kazakhstan region 2016) were compiled by the author through information sources	

Tourism Competitiveness Factors Assessment was carried out by applying an analytical assessment method of the teachers-experts of the Social Sciences Faculty of Khoja Ahmed Yasawi International Kazakh-Turkish University, the Head of the "Tourism" Department of the Turkestan Administration, the Head of the Hotel "Yassi", teachers and experts of the "Tourism" Department of Mukhtar Auezov South-Kazakhstan State University and the citizens of the Republic of Turkey working in the territory of Kazakhstan. The assessment of factors being evaluated was realized in the conformity with the requirements of the relevant international standards.

The assessment of each of the factors was carried out on 5-point Likert scale: «1» - low score (low competitiveness factor), «5» - maximum score (this factor may be used as a basis for the tourism industry development in the region). The assessment results of the factors of tourism development in the South-Kazakhstan region are presented in Tables 7-10.



**Table 7. Factor Condition Assessment results**

Factors	Assessment of the experts										Total score	Average score
	1	2	3	4	5	6	7	8	9	10		
1.Number and diversity of tourist cognitive objects	4	4	5	5	5	4	5	5	5	4	46	4,6
2.Availability and condition of tourist cognitive objects	3	2	2	3	4	2	3	3	2	4	28	2,8
3.Labor resources provision	4	4	3	2	3	3	2	4	3	4	32	3,2
4.Professional qualification of labor resources	2	2	2	1	3	1	2	2	3	2	20	2
5.Investment projects preparation and investment potential	4	3	3	3	3	3	4	3	3	3	32	3,2
6.Funded provision of business entities, the MPA condition and MPA provision level	3	2	2	1	3	2	1	3	2	3	22	2,2
Total											180	3,0

**Table 8. Conjunctural Factors Assessment results**

Factors	Assessment of the experts										Total score	Average score
	1	2	3	4	5	6	7	8	9	10		
1.Sustainability of demand for regional tourism products	4	4	3	5	4	5	3	4	4	4	40	4,0
2. Market potential (possibility of selling regional tourism)	5	5	5	4	5	4	5	5	5	5	48	4,8
3.Market restrictions (foreign economic, legal, technical, social, etc.)	3	3	3	2	3	3	2	3	3	3	28	2,8
4.Satisfaction level of the international industry standards requirements	2	2	3	1	2	2	3	1	2	2	20	2,0
5. Connection to the corporate network and development of franchising	3	2	3	3	3	3	1	1	3	3	25	2,5
6.The solvency of the sales market	4	5	4	4	5	3	4	4	4	4	41	4,1
Total											202	3,4

**Table 9. Internal competitiveness and strategy assessment results**

Factors	Assessment of the experts										Total score	Average score
	1	2	3	4	5	6	7	8	9	10		
1.Strategic management system condition of tourism in the region	5	4	5	3	4	4	4	4	4	5	42	4,2
2.Effectiveness of state measures in the tourism industry	4	4	4	3	4	5	3	3	4	4	38	3,8
3. Availability of management centers for tourism development in the regions	3	3	3	4	4	3	3	4	4	3	34	3,4
4.Compliance of regional programs with the national tourism development strategies	4	4	4	5	4	4	4	4	4	5	42	4,2
5. Internal competitiveness level in the tourist market (1 ← monopolized market, 2 ← competitive market)	3	3	3	2	4	3	3	3	3	3	30	3
6.Dependence on regional strategic decisions and external corporate management	3	3	4	5	4	3	4	4	4	4	38	3,8
Total											224	3,7

**Table 10. Infrastructure Provision Assessment Results**

Factors	Assessment of the experts										Total score	Average score	
	1	2	3	4	5	6	7	8	9	10			
1	2										3	4	
1. The accommodation possibility - Sufficiency and condition	2	2	2	1	3	2	2	2	2	2	20	2	2,1
- service quality	2	2	3	1	3	2	2	2	2	3	22	2,2	
2. Public catering industry - condition and development level	3	2	2	1	3	2	3	2	2	2	22	2,2	2,2
- service assortment and quality	2	2	3	1	3	2	3	1	3	2	22	2,2	
1. Trade sector - condition and development level	2	3	3	1	4	3	2	3	3	2	26	2,6	2,6
- service assortment and quality	2	3	4	2	3	3	2	2	2	3	26	2,6	
1. Transport service - condition and development level	4	3	3	2	3	2	2	3	3	3	28	2,8	2,6
-Transport service quality	3	3	3	1	2	3	3	2	2	2	24	2,4	
1. Additional paid services - availability and development	3	2	2	1	3	3	2	2	2	2	22	2,2	2,3
- Service quality	2	2	3	2	3	2	2	3	2	2	23	2,3	
Total											235	2,4	



On the basis of experts' opinions, the South-Kazakhstan tourism competitiveness factors are characterized by average points in terms of service and service quality organization in terms of satisfying the requirements to meet or exceed international standards:

**1. Factor conditions - 3,0 points (average level).** Due to the number and diversity of tourist presentation, availability of labor resources and investment potential of tourism, unsatisfactory technical condition and accessibility of presentation objects, qualifications of labor resources and low availability of a tour agency, are all eliminated.

**2. Conjunctural conditions - 3.4 points (slightly above average).** Generally, favorable conditions are created in foreign markets. The demand for Kazakhstani tourism products from the CIS countries and foreign tourists has a prerequisite for growth due to the reduction of foreign markets. At the same time, Kazakhstani tourism products and travel agencies are insufficiently connected to contractual relations with external entities and external corporate networks, thereby limiting access to foreign markets.

**3. Strategies and internal competitiveness - 3.7 points (over average).** The condition in the area of strategic management of tourism development in the region and the consensus of regional and corporate strategies is acceptable. Tourism development is one of the most important regional projects and currently it is referred to considerably modified projects. This is particularly due to the investment projects that are being prepared for implementation and the availability of active work with economic entities that are engaged in their implementation.

**4. Infrastructure and subsidiary industries development- 2.4 points (below average).** As a result of these factors, the country is experiencing a number of unfavorable conditions. The bulk of the tourist and subsidiary infrastructure facilities do not meet international standards (primarily, standards for the offered services quality). Therefore, raising the competitiveness of Kazakhstani tourism products at the practical level will consistently improve services quality and develop tourism infrastructure accordingly.

Based on these assessments, the concept of key areas of competitiveness improvement in the tourist complex in the South Kazakhstan region is required.

### **SWOT analysis of management in the spiritual-historical tourism development in the southern region of Kazakhstan**

Strategic and competitiveness analysis is an important step in the tourism development and the formation of a management strategy in the region. The strategic analysis allows estimating the internal and external factors, which are formed within the territory of the studied area and has either a positive or negative impact on the tourist complex development. On the basis of strategic analysis, priorities of tourism development and management will be developed as well as individual strategies for counteracting negative factors. The competitiveness analysis will allow assessing the presence and importance of determinants of tourism competitiveness in the region on the basis of which it will formulate effective competitiveness strategies.

Based on the Swot analysis, internal and external factors (both negative and positive) have been identified for the tourism development in Southern Kazakhstan. Their power of influence and their combination determine the competitiveness of regional tourism products in foreign markets. The identified strengths and opportunities are based on the competitiveness strategy of tourism development in the region and are implemented through the list of measures aimed at their use and strengthening. On the basis of these factors, differential product strategies are offered in the tourism industry. Weaknesses and external threats are considered as restrictions for tourism development in the region. Therefore, for these factors, the mechanisms for their elimination or their minimization are presented below. We take a closer look at internal and external factors of tourism development management in the Southern Kazakhstan below.



The strongest aspects of tourism in the region are the following key factors that determine the internal tourism and recreational potential:

1. Availability of unused natural landscapes, national and natural parks, reserves, many small reserves and natural monuments;
2. Presence of rich historical and cultural heritage, including the world-famous historical and cultural monuments (Arystanbab, Mausoleum of Akhmet Yassawi, Aisha Bibi, Karakhan Baba, Korkyt Ata);
3. Effective geographical situation (the common border with the Eurasian Economic Union, Astana and regional centers, China and neighboring countries);
4. Developed international economic and cultural relations with Central Asian and other Asian countries, many international projects and programs implemented in the field of tourism and tourism infrastructure development;
5. Less developed transport infrastructure;
6. The interest of foreign large companies in investing in the tourism industry and the construction of many tourist infrastructure facilities;
7. Important educational potential in the tourism industry;
8. High level provision of tourism with qualified personnel;
9. The presence of the information and tourist center in the republic and in the regions, the republican state and regional support policy and the system of strategic documents for tourism development inter alia, Tourism Development Strategy, regional programs, scheme of accommodation of tourism infrastructure facilities, .

The following factors that can be attributed to the factors that hinder the development in this area and are considered as a kind of internal barrier can be referred to the weaknesses of tourism in South-Kazakhstan region:

1. Low popularity of the region's tourist product brands in the republican and international tourist markets, lack of tourist products that meet international standards and requirements
2. Dominance of point tourist facilities and tourist products, the absence of tours of a complex character that connect individual tourist centers of the region;
3. "Outflow" of tourism profits outside the region (non-closure of value chains in the tourism);
4. Insufficient level of tourist potential use of the region;
5. Uneven distribution of tourist management load on tourist centers of the region;
6. Lack of service quality and tourist infrastructure and poor quality;
7. Lack of tourists security and insufficient development of the insurance market and financial services market.

The following factors can be referred to as the real or potential security of the external adverse factors and threats of tourism development in the South-Kazakhstan region:

1. Incompleteness of the regulatory framework and legal regulation system in the management of tourism development;
2. Low payment demand of local population for tourism services;
3. The main competitiveness condition in South-Kazakhstan region;
4. Legal risks associated with the implementation of investment projects in the zones of the region and the difficulty of allocation of land plots for construction;
5. Change of external market conjuncture and foreign economic constraints (state foreign trade and migration policy);
6. Deterioration of the ecological situation in South Kazakhstan.

The following factors can be referred to potential that can be used or not sufficiently used today in the area of tourism development and management of the region:

1. The most extensive use of geographical situation for the development of transit and business tourism;



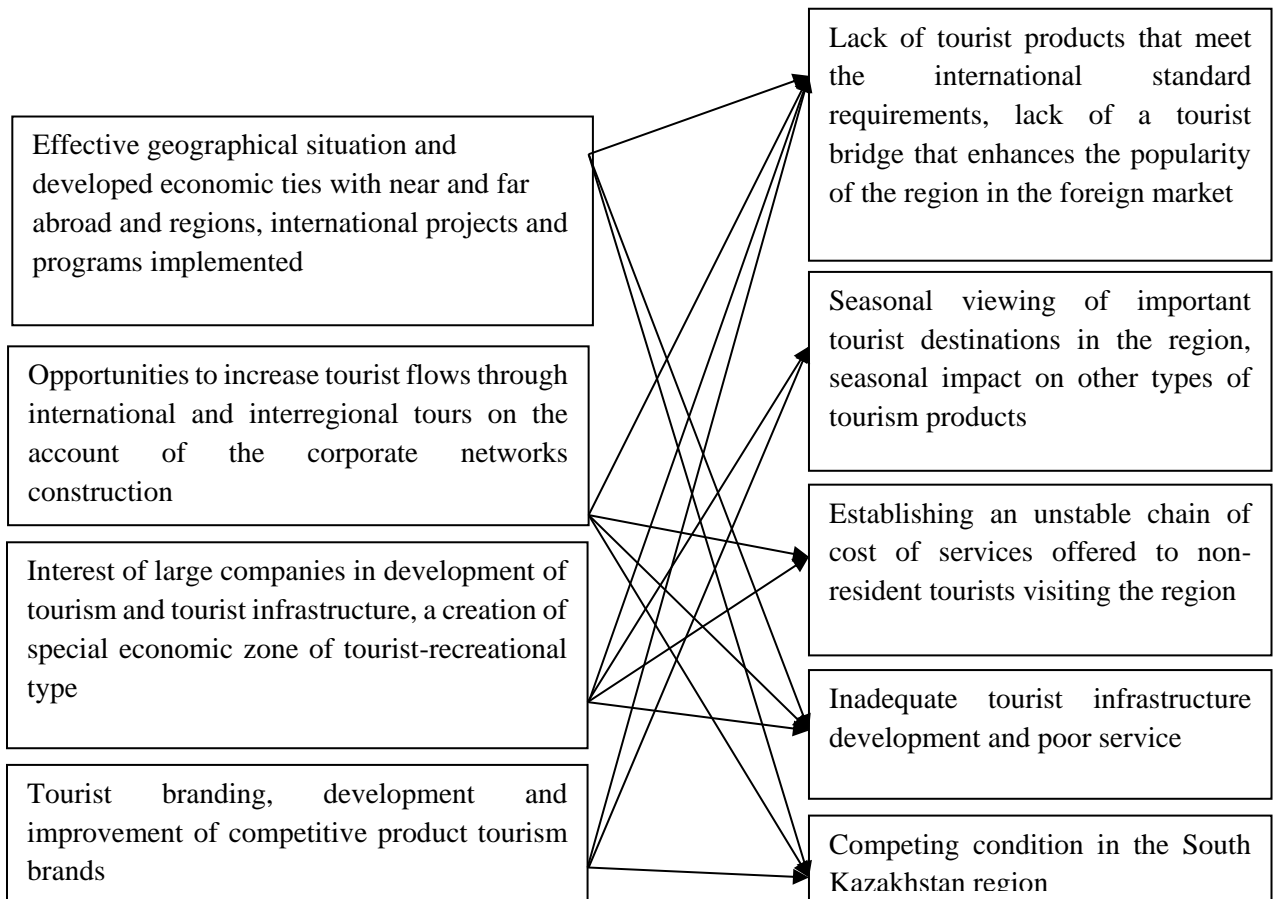


2. Possibility to increase tourist flows from Turkey and neighboring countries through the preparation of joint tourist products and development of conditional specialization (outsourcing);
3. Establishment of a unique economic zone of tourism and recreational type in the South Kazakhstan region (with regional status);
4. Use of opportunities for the development of ecological, sport and natural, as well as other forms of cultural and business tourism;
5. Possibility to organize training programs for the field of tourism and local population-based retraining;
6. Complete realization of the state support of tourism development;
7. Development and promotion of competitive tourism brands;
8. Development of tourist and border infrastructure as a result of realization of international projects of frontier areas of the region, republic and near abroad.

We have selected the most important ones in the strategic management decisions of the above-mentioned internal and external factors of tourism development in South-Kazakhstan and presented this in the SWOT matrix (Table 27). During the use of the SWOT matrix and the synthesis of internal and external factors, each factor was evaluated for its dependence on a group of dependent factors. As a result, factors affecting complexly will be in chain relation with dependent factors. The most important favorable factors (factors that are characterized by a wide range of possibilities for combining with other external and internal factors in the SWOT matrix) that are built on the basis of the synthesis of internal and external factors and the strategy of increasing regional tourism competitiveness by using the SWOT matrix were clarified as being:

- Favorable geographical situation and developed economic ties with neighboring and far-abroad countries and regions, international projects and programs that are to be implemented;
  - Possibilities to increase tourist flow through the development of international and interregional tours on the account of the construction of corporate networks;
  - The interest of large companies in the development of tourism and tourist infrastructure of the Southern Kazakhstan, an implementation of major investment projects in the tourism industry, a creation of a special economic zone of tourist-recreational type;
  - Development and improvement of tourist branding, competitive product tourism brands.
- The most significant negative factors of tourism development that limit the opportunities and reduce competitiveness of national tourism in South Kazakhstan are as follows:
- Low popularity of the region's tourist product brands in regional and foreign markets, lack of tourist products that meet international standards and requirements;
  - Open seasonality of most of the tourist product of the region and the republic combining with the complexity of seasonal access to the main objects of tourist demonstration;
  - Non-closure of value chain formation in tourism, the size of services offered for outsourcing to non-resident structures and companies of the region;
  - Underdeveloped tourist infrastructure and low level of service.

From the viewpoint of tourism development and management, this plays a particularly important role in neutralizing the most important favorable factors of the inner and outer environment of the region, or in minimizing the negative impact of adverse environmental factors. Favorable factors can be used simultaneously against a number of negative factors.



**Figure 4.** The use directions of suitable factors in prevention of adverse factors affecting the tourism development in the South Kazakhstan (Source: Authors' own)

Table 11 presents a set of measures that will enable the South Kazakhstan tourism development to experience the benefits bestowed with the aforementioned favorable factors and to have a greater impact on their practical use. These measures can be considered as priority areas and measures that are covered by the regional tourism development programs. The use of the favorable factors identified during the SWOT analysis and their implementation through the realization of the measures outlined in Table 28 will help to increase the popularity and competitiveness of existing Kazakhstani tourism products, and, most importantly, create infrastructure bases and conditions for new tourism development and investment in tourism.

**Table 11.** Measures on the use of favorable factors in tourism development in South Kazakhstan region

Factors	A set of measures
1	2
Effective geographical situation and developed economic ties with near and far abroad and regions, international projects and programs implemented	<ul style="list-style-type: none"> <li>- Development of border and customs infrastructure, The opening of the international border passage points;</li> <li>- Development of cross-border cooperation and the financing of border cooperation projects in the regional budget;</li> <li>- Facilitating the Kazakhstani visa procedures of near and far abroad citizens when traveling to the border areas of the Republic of Kazakhstan and South-Kazakhstani, organizing the registration of foreign citizens directly at the main tourist sites;</li> </ul>



<p>Opportunities to increase tourist flows through international and interregional tours on the account of the corporate networks construction</p>	<ul style="list-style-type: none"> <li>- Inclusion of certain types of tourist services offered by local firms in international tourist routes;</li> <li>- Attraction of powerful potential of tourist "dead bodies" and reduction of seasonal diversity of tourist flows;-Signing agency contracts for the sale of existing tourism products in the franchise system conditions;</li> <li>- Coordination with "Kazakhstan Passenger Transportation" OJSC on the arrangement of additional wagon components in summer season (now the loss assessment of additional services is 10% of the number of organized tourists);</li> <li>- Looking for partners who are interested in developing partnerships for the preparation and improvement of new products;</li> <li>- Reduction of transactional and investment expenses (e.g., franchising, outsourcing, factoring, etc.) on the account of the development of different systems and methods of agency contracts;</li> <li>signing agency contracts for the sale of existing tourism products in the franchise system conditions;</li> <li>- Inclusion of certain types of tourist services offered by local firms in international tourist routes;</li> <li>- Use of international standards and normative-legal base in the shortcomings of the national legislation;</li> <li>- Use of external global distribution networks and channels for tour implementation.</li> </ul>
<p>Interest of large companies in the development of tourism and tourist infrastructure, a creation of special economic zone of tourist-recreational type</p>	<ul style="list-style-type: none"> <li>- Adaptation to world best practices in the field of tourism service (benchmarking) and use of cross-sectoral international organizations for the promotion and lobbying of local companies (e.g. World Tourist Organization);</li> <li>- Sale of municipal private facilities and conducting open long-term lease tenders related to the possibility of using it in tourism development via the use of international information channels;</li> <li>- Preparation of a set of project proposals for the formation of tourism complexes in the territory of the Republic and in the region and allocation of investment sites for their implementation;</li> <li>- Creation of a network-type economic zone in the country and in the region through the implementation of infrastructural projects within the framework of the support centers established by the involvement of large companies.</li> </ul>
<p>Tourist branding, development and improvement of competitive product tourism brands</p>	<ul style="list-style-type: none"> <li>- Strengthening of national traditions, preparation and improvement of international projects in the field of branding;</li> <li>- Development of informational products for the tours improvement;</li> <li>- Formation of the national "spiritual and cultural-historical" tourist brand and its improvement through the use of international marketing channels;</li> <li>- Actual positioning on local education and management in the South Kazakhstan and foreign tourist markets in general</li> <li>- Substantial increase of "image" and marketing investments in the overall investment structure of tourism;</li> <li>- Use of corporate channels of large foreign tourist companies to improve Kazakhstan's tourism brands.</li> </ul>
<p>Source: Authors' own</p>	

In order to prepare a set of measures to create a favorable investment climate in the region as a whole, and also to identify potential analysis and growth points, it is also necessary to evaluate actual competitiveness principles of national tourism products in Kazakhstan and in particular in South Kazakhstan.

## Conclusion

Analyzing the change in major economic indicators of tourism development, it can be concluded that the tourism potential of Kazakhstan is not implemented fully because the development of tourism industry depends on the effective creation of a modern competitive tourist complex that includes the necessary infrastructure, transport and logistics system, including the reconstruction of checkpoints across the State border of the Republic of Kazakhstan (road, air, rail), providing ample opportunities for satisfaction of requirements of Kazakhstan and foreign citizens in tourist services. The creation of a tourist complex will greatly contribute to the development of the country's economy through tax revenues, foreign



exchange, increase employment, and provide control over the preservation and rational use of cultural and natural heritage.

For the assessment of the tourism competitiveness in our study, a analysis technique was conducted in the region and Porter's "competitive rhomb" model (model of competitiveness determinants) was used for our purpose, as the whole regional tourist complex is a valuation object.

The result of the assessment factors based on the opinion of the experts of the South Kazakhstan tourism competitiveness factors in terms of satisfying the requirements to international standards, the service quality and services organization in this area has the following conclusions:

**1. Factor conditions - 3,0 points (average level).** Due to the number and diversity of tourist presentation, availability of labor resources and investment potential of tourism, unsatisfactory technical condition and accessibility of presentation objects, qualifications of labor resources and low availability of a tour agency are eliminated.

**2. Conjunctural conditions - 3.4 points (slightly above average).** Generally, favorable conditions are created in foreign markets. The demand for Kazakhstani tourism products from the CIS countries and foreign tourists has a prerequisite for growth due to the reduction of foreign markets. At the same time, Kazakhstani tourism products and travel agencies are insufficiently connected to contractual relations with external entities and external corporate networks, thereby limiting access to foreign markets.

**3. Strategies and internal competitiveness - 3.7 points (over average).** The condition in the area of strategic management of tourism development in the region and the consensus of regional and corporate strategies is acceptable. Tourism development is one of the most important regional projects and currently it is referred to considerably modified projects. This is particularly due to the investment projects that are being prepared for implementation and the availability of active work with economic entities that are engaged in their implementation.

**4. Infrastructure and subsidiary industries development- 2.4 points (below average).** As a result of these factors, the country is experiencing a number of unfavorable conditions. The bulk of the tourist and subsidiary infrastructure facilities do not meet international standards (primarily, standards for the offered services quality). Therefore, raising competitiveness of Kazakhstani tourism products at the practical level will consistently improve services quality and develop tourism infrastructure.

We also found that the use of favorable factors identified during the SWOT analysis and implementation of the measures identified during the analysis allows increasing the popularity and competitiveness of existing Kazakhstani products, which in turn facilitates the development of infrastructure for the new tourism development and investment in tourism.

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