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KAZAKHSTAN TOURISM MARKET STRUCTURE ANALYSIS AND OPTIMIZATION PATH SELECTION

Tourism is not only the largest sector in the world economy, but also one of the fastest growing emerging industries in the world. Unlike other economic sectors that transport products to consumers, tourism enables people to migrate to places where tourism resources are concentrated. These resources are consumed somewhere. With the development of social economy, tourism has increasingly shown its important position in the national economy.

After years of development, Kazakhstan's tourism industry has made significant contributions to the national economic development. At the same time, the industry has also accumulated many problems and contradictions in the long-term development process. From a macro level, the development situation of Kazakhstan's tourism industry is good, with total tourism revenue and tourist numbers rising rapidly. From a micro level, tourism enterprises are small in scale, have poor operations, and have low overall competitiveness. From the industrial level analysis, the main problems and contradictions of Kazakhstan's tourism industry are related to its market structure characteristics. Structural issues are core issues in the development of tourism in Kazakhstan. Using structural ideas and methods to study the tourism industry in Kazakhstan can guide the sustainable development of the tourism industry and provide a basis for decision-making by the government. Based on the literature review of the tourism market structure, the authors analyze the optimization path based on the Kazakhstan tourism market structure and effectively promotes the tourism industry.

Key words: tourism industry; market share; market concentration; market structure; optimization path.

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Қазақстанның туристік нарығының құрылымын талдау және оңтайландыру жолдарын таңдау

Туризм әлемдік экономиканың ең ірі секторы ғана емес, сонымен қатар әлемдегі ең жылдам дамып келе жатқан салалардың біріне жатады. Тұтынушыларға өнімді жеткізетін экономиканың басқа салаларынан айырмашылығы, туризм адамдарға туристік ресурстар шоғырланған жерлерге қоныс аударуға мүмкіндік береді. Бұл ресурстар бір жерлерде жұмсалады. Әлеуметтік экономиканың дамуымен, туризм – ұлттық экономикадағы маңызды орнын көбірек көрсетуде.

Қазақстанның туристік индустриясы көптеген жылдар бойы дамығаннан кейін ұлттық экономиканың дамуына елеулі үлес қосты. Сонымен қатар, салада ұзақ мерзімді даму процесінде көптеген мәселелер мен қайшылықтар жинақталған. Макродеңгейде Қазақстанның туристік саласы дамуының жағдайы жақсаруда, бұл ретте туризмнен түсетін жалпы табыс пен туристер саны да тез өсуде. Микродеңгейде туристік кәсіпорындар ауқымы жағынан шағын әрі нашар жұмыс істеуде және жалпы бәсекеге қабілеттілігі төмен болуда. Өнеркәсіптік деңгейді талдауға сүйене отырып, Қазақстанның туристік саласының негізгі сұрақтары мен қайшылықтары оның нарықтық құрылымының ерекшеліктерімен байланысты. Құрылымдық мәселелер Қазақстанда туризмді дамытуда шешуші болып келеді. Қазақстанда туризм индустриясын зерделеу үшін құрылымдық идеялар мен әдістерді пайдалану – туризм индустриясының тұрақты дамуына ықпал етіп, Үкіметтің шешім қабылдауы үшін негізді қамтамасыз ете алады. Туристік нарық құрылымы

туралы әдебиеттерді шолуға сүйене отырып, авторлар Қазақстанның туристік нарығының құрылымына негізделген оңтайландыру жолдарын талдайды және туристік индустрияны тиімді ілгерілетеді.

Түйін сөздер: туризм индустриясы; нарық үлесі; нарықтың шоғырлануы; нарық құрылымы; оңтайландыру жолы.

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Анализ структуры туристского рынка Казахстана и выбор путей оптимизации

Туризм является не только крупнейшим сектором мировой экономики, но и одной из самых быстрорастущих развивающихся отраслей в мире. В отличие от других секторов экономики, которые доставляют продукцию потребителям, туризм позволяет людям мигрировать в места, где сосредоточены туристские ресурсы. Эти ресурсы местами расходуются. С развитием социальной экономики туризм все больше демонстрирует свое важное положение в национальной экономике.

После многих лет развития – туристская индустрия Казахстана внесла значительный вклад в развитие национальной экономики. В то же время в отрасли также накопилось много проблем и противоречий в процессе долгосрочного развития. На макроуровне ситуация, связанная с развитием туристской отрасли Казахстана является более или менее благополучной, при этом общий доход от туризма и число туристов быстро растут. На микроуровне туристические предприятия невелики по масштабам, плохо функционируют и обладают низкой общей конкурентоспособностью. Исходя из анализа промышленного уровня, основные проблемы и противоречия туристской отрасли Казахстана связаны с особенностями ее рыночной структуры. Структурные проблемы являются ключевыми в развитии туризма в Казахстане. Использование структурных идей и методов для изучения индустрии туризма в Казахстане может способствовать устойчивому развитию индустрии туризма и обеспечить основу для принятия решений правительством. Основываясь на обзоре литературы о структуре туристского рынка, авторы анализируют пути оптимизации, основанные на структуре туристского рынка Казахстана, и эффективно продвигают туристскую индустрию.

Ключевые слова: индустрия туризма; доля рынка; концентрация рынка; структура рынка; пути оптимизации.

Introduction

Since the end of the XX century, the world tourism industry has been growing rapidly, while many countries, many localities, in particular cities and regions are involved in fierce competition in the tourist market. Due to the great competition in the regional tourism market, it places higher demands on scientific planning of tourist destinations and effective marketing of tourist markets. Moreover, the tourism market has also gradually become an important topic of tourism research, mainly focusing on the analysis of the mechanisms of influence, demand and evaluation.

On the one hand, the tourist market is by its nature a market of services, its development is due to the presence of a wide range of offers in the field of transport, accommodation, restaurants, recreation centers, medical institutions. On the other hand, one can see the relationship between the tourist market and the market of goods for tourist consumption.

To date, the countries that are successful in attracting tourists in the world tourism market are those countries that show a deep focus on increasing competition at the highest levels of the tourism sector.

Materials and methods

As a theoretical and informational basis of the study are the works of domestic and foreign researchers in the field of tourism and tourism market, (Zhaoping Yang., I. Akbar et al., 2022.), as well as sources of primary base, i.e. statistical data of the Bureau of National Statistics of the Republic of Kazakhstan. And also considered the Concept in the field of development of the sphere.

We used the system approach in the study of the state of the tourism market, methods of statistical, economic and comparative analysis and synthesis, the method of induction. We applied and analyzed a set of economic indicators of tourism

sphere development on the basis of statistical data and measuring tools that allow, in the process of calculation, to obtain the necessary data.

The methodological basis of this article is scientific methods based on the requirements of objective and comprehensive analysis of the tourism market. The research is conducted using a combination of methods of scientific cognition. The abstract-logical method allowed us to identify practical aspects of tourism market assessment. (A.H. Mukanov., A. Seken et al., 2023 106-122) The use of economic and statistical methods allowed us to identify trends in the development of the tourist market, to assess their development, as well as to bring their further promotion and methods to improve its sustainability.

In the article on the basis of content research the current state of the structure and state of development of the tourist market of Kazakhstan were analyzed, the main elements and external factors affecting the structure of the tourist market were identified, as well as the concentration of the country's tourist market was determined. On the basis of the system analysis the problems taking place in the structure of the tourist market were demonstrated and on the basis of inductive-deductive method of cognition the measures on improvement of the tourism industry market were considered, which led to the proposal of ways to optimize this sphere.

Literature review

The current state of the tourist services market in the Republic of Kazakhstan was studied in the work of (Zh.I. Sariyeva and S.H. Shalgimbayeva.,2019)

In the work of (E.A. Abenova 2019), the results of the study show new trends in the development of the industry, where there are certain changes in the motivation for choosing a travel destination,

a reorientation to domestic tourism and the sector of spa services, a change in approaches to the organization of tourist business, the expansion of the use of digital technologies, a shift in emphasis on ensuring the safety of services and accommodation of tourists .

The post-covid state and development of tourism in Kazakhstan, i.e. the current situation in tourism before and after the covid epidemic in the world and in the country was investigated in the work of (D.A. Kainazarova, L.K. Baymagambetova., 2023).

In addition, the state of the tourism market can be seen in the UNWTO electronic resources, in the reports of government agencies and professional associations, as well as in the Concept of Development of the tourism industry of the Republic of Kazakhstan for 2023-2029, where you can find certain analysis and statistical data (Oralov A.2023).

Results and discussion

Current situation of Kazakhstan's tourism market structure

Talking about the tourism market structure from the perspective of the entire country, it includes three levels, namely the inbound tourism market, the domestic tourism market and the outbound tourism market. Over the past thirty years, the structure of Kazakhstan's tourism market has undergone tremendous changes. From 1991 to 2000, the focus was mainly on inbound tourism and domestic tourism; after 2000, outbound tourism was extremely active. With the stable and sustained development of Kazakhstan's economy and the improvement of infrastructure, the tourism market structure is constantly changing. First, inbound tourism has increased moderately, second, domestic tourism demand continues to expand, and third, overseas tourism continues to grow.

Table 1 – Kazakhstan's tourism market structure share

ye in	2018	2019	2020	2021	2022
Domestic travel	4, 695, 942	5, 286, 782	3, 328, 614	5, 145, 217	6, 407, 318
Inbound tourism	8 789 314	8 514 989	2 034 753	1 330 169	4 728 771
Outbound tourism	10 646 241	10 707 270	2 865 004	3 501 387	7 669 988

The tourism industry was hit hard due to the epidemic in 2020 and 2021. It has begun to recover since 2022. However, most tourists in Kazakhstan's tourism market still come from CIS countries, accounting for 88% of the total number of tourists and accounting for 1% of tourism consumption. 70.6%. Tourists from other countries accounted for 12% and accounted for 29.4% of tourism consumption. Although the domestic tourism industry is gradually rising, the development of the tourism industry is still slow, the tourism market structure is imbalanced, and the outbound tourism market still dominates. This trend has a very low impact on the country's socio-economic development. According to statistics from the National Statistical Committee of Kazakhstan (KNS), the direct contribution of tourism to the national economy in 2020 was US\$314 million, accounting for 1.70% of GDP. In 2021, due to the epidemic, it increased by 2.1% to US\$450 million, so the country formulated Plans to increase tourism's contribution to the national economy to 8% by 2025.

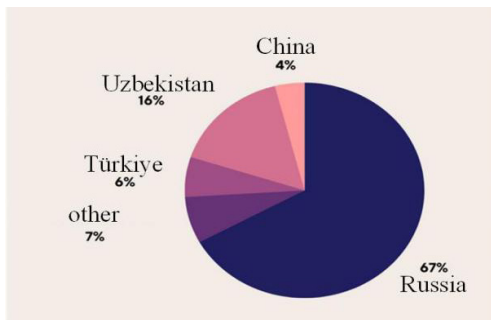


Figure 1 – Inbound tourism market structure (Kainazarova D.A., Baimagambetova L.K. 2023)

Development status of Kazakhstan's tourism market

In 2022, while the number of tourists will steadily increase, outbound tourism will enter a period of rapid development. Kazakhstan's tourism market has initially formed a pattern in which domestic, inbound and outbound tourism markets develop together based on domestic tourism. The driving role of tourism in the economy has also gradually emerged. The structural recovery of the tourism industry in 2022 will show four trend changes: First, the recovery will bring about changes, and domestic tourism will grow rapidly. Tourism is more dependent on cities and scenic spots. Second, there are gaps in recovery. The differences between the inbound

and outbound tourism markets are intensifying. The third is the increase in industrial concentration. The tourism market is concentrated in the country and surrounding areas. Fourth, recovery is accompanied by changes in technology, cognition and sustainable development. The integration of technological means has accelerated the development trend of tourism digitalization, increasing awareness of the market and destinations (Kim, A.G.2014)

Basic elements of tourism market

The three elements of tourism are: tourism resources, tourism facilities, and tourism services.

1. Tourism resources: Tourism resources are the prerequisite for the development of tourism and the foundation of tourism. Tourism resources mainly include natural scenery tourism resources and cultural landscape tourism resources. Natural scenic tourism resources include mountains, canyons, forests, volcanoes, rivers, lakes, beaches, hot springs, wild animals and plants, climate, etc., which can be summarized into four major categories: geomorphology, hydrology, climate, and biology (Qin Mo-Fan.,2018). Kazakhstan has rich tourism and leisure resources, especially attractive mountain, leisure, nature, water and tourist areas. This will enable the development of inbound tourism without any obstacles. Kazakhstan is a plain country with most of its territory occupied by deserts and semi-deserts. However, the country has a fascinating tourist terrain. The main feature of Kazakhstan is the high mountains covered with eternal snow. There are many lakes and hot springs. There are currently 112 special protected areas in Kazakhstan, including 12 national parks. These national parks are managed for tourism purposes and are intended to develop health resort tourism. The object of tourism is natural and natural-artificial landscapes, characterized by nature and culture, that is, the integration of traditional culture and environment. Kazakhstan has a long and particularly fascinating history, with more than 27,000 monuments. With the development of modern tourism, tourism products have become increasingly rich and diverse, which has promoted the further improvement of the tourism product system. For example, vacation tourism products have further expanded from the original hot spring vacation tourism to include hot spring recuperation, lakeside leisure, beach vacations, rural tourism, camping vacations, etc.; sightseeing tourism products have further expanded from the original natural scenery tours to Sightseeing tourism products include natural landscapes, cultural monuments, ethnic customs, city

scenery, etc.; in addition, special tourism products with business tourism, exhibition tourism, wellness tourism, ecological tourism, and business tourism as content have also been developed (Konceptsiya razvitiya turistskoj otrasli Respubliki Kazahstan na 2023 – 2029 gode)

2. Tourism facilities: Tourism infrastructure refers to the general term for various material facilities built to meet the needs of tourists during travel. An indispensable material foundation for the development of tourism.

(1) Transportation

a. Roads: State border roads and checkpoint infrastructure of the Republic of Kazakhstan According to data from the Ministry of Interior, the current length of public roads in Kazakhstan is 95,600 kilometers, of which 24,400 kilometers are national roads and 71,200 kilometers are regional and county roads. Road transport and transport infrastructure as a landlocked country, road transport plays an important role in meeting the needs of population transport and foreign trade between Europe and Asia. There are 105 bus stations in the country.

b. Aviation:

Currently, there are 18 airports of national and regional significance across the country, 17 of which are authorized to operate international flights.

International air transport The Republic of Kazakhstan is committed to launching flights to major cities and international financial centers. Kazakhstan has concluded intergovernmental agreements in the field of air communications with 38 countries. There are 98 routes to and from Kazakhstan: 56 from CIS countries, 12 from EU countries, 15 from Southeast Asian countries, and 15 from Middle Eastern countries.

c. Railway: Railway transportation is the most affordable mode of transportation for domestic tourists. Compared with other modes of passenger transportation, railway transportation has many advantages, the most important of which are: transportation regularity, not affected by season, date and weather; and relatively low cost. Kazakhstan's railway operation mileage is 16,000 kilometers. The construction of 2,500 kilometers of new railways provides internal links between regions, meets the needs of the population and increases Kazakhstan's export and transit potential.

3. Tourism services: There are currently 3,600 tourist accommodation sites in Kazakhstan. Among them: 53 tourist centers, 2,100 hotels of various types, 1,100 villas and apartments, 84 professional resorts, and 120 youth camps, distributed in five tourist areas across the country (Mazbayev O.B 2009)

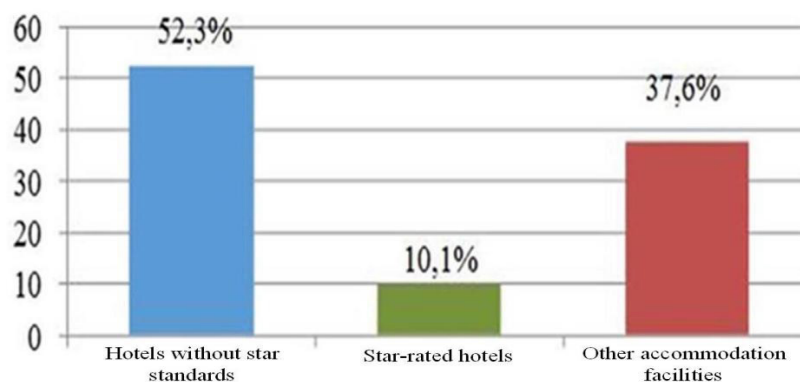


Figure 2 – The structure of a hotel in Kazakhstan

External factors affecting the structure of the tourism market:

1. Geographical location: Each tourist market has its own unique geographical location and characteristics, including natural landscapes, historical and cultural heritage, etc. Kazakhstan is the world's largest landlocked country, located in the center of Eurasia, along the Silk Road, a transportation hub

and logistics distribution center combining east and west, with superior transportation conditions and unique historical culture and natural landscapes (Petrov E.S., Dauletova A.M., 2019). 2. Economic factors: Tourism plays an important role in economic development, so the national economic situation has a great impact on the tourism market, such as exchange rate changes and inflation. Kazakhstan is

a new economy in Central Asia and the locomotive of the regional economy in Central Asia. According to the World Bank's Doing Business Report 2020, Kazakhstan ranks 25th in the world and is the country that best protects the rights and interests of small and medium investors in the world. Kazakhstan's GDP reached US\$179.332 billion, with an annual growth rate of 4.5%. Kazakhstan's GDP per capita is \$9,686. Kazakhstan ranks third among the 25 most dynamic economies of the first decade of the twenty-first century, after China and Qatar. Kazakhstan's role in world trade and its central location on the New Silk Road allow the country to open its markets to billions of people (Sariyeva Zh.I., Shalgimbayeva S.H., 2019).

3. Technological progress: The development of technology has made travel more convenient and affordable, such as online booking, smart navigation, etc.

Strategies such as "Transition to a Digital State", "Digital Silk Road", "Development of Human Capital", "Creation of an Innovation Ecosystem" and other strategies that Kazakhstan is implementing are – digitalization of traditional economic sectors of the Republic of Kazakhstan using advanced technologies and opportunities to rebuild, to improve labor productivity and increase capital, rebuild national infrastructure, provide services to people and businesses, and anticipate their needs. Develop high-speed, secure data transmission, storage and processing infrastructure to transform into a knowledge economy. For tourism development Provide convenient, fast, comfortable and accurate information services.

4. Political factors: Political stability and security are one of the key factors for the development of tourism. Issues such as terrorist attacks, wars and political events will have a negative impact on the tourism market. Kazakhstan is the geopolitical center of the Eurasian region and the balance point of geopolitical relations in the Eurasian region. Developing countries with political stability, social harmony, and sustainable economic development are very attractive to the world's largest corporate groups and investors.

5. Social and cultural factors: Social and cultural factors will also have an impact on the tourism market, including population structure, consumption habits, religious beliefs, etc. With a population of 20 million, Kazakhstan is a very tolerant country with a rich cultural heritage, high quality and well-educated population.

Concentration of Kazakhstan's tourism market

Market Concentration Rate refers to the sum of the market shares (output value, output, sales,

sales volume, etc.) of the top N cities in the relevant market of an industry. It is a measurement of the concentration of the market structure of the entire industry. Indicators are used to measure differences in the relative size of the market and are important quantitative indicators of market power (Qin Mo-Fan, 2018). Market concentration is the most basic and important factor that determines the market structure, and embodies the degree of competition and monopoly in the market. There are many specific methods and corresponding indicators for measuring market concentration. The absolute concentration CR_n index is used here.

$$CR_n = \sum_{i=1}^n S_i \quad (1)$$

CR_n index calculation formula

The market concentration rate refers to the sum of the market shares of the top N cities (regions) in the relevant market of the industry. For example, CR₄ means that the four largest cities have the relevant market share. Similarly, the five-city concentration rate CR₅ and the eight-city concentration rate CR₈ can be calculated. The CR_n index is expressed by the cumulative market share of the largest N cities in the industry as a proportion of the entire industry market, where: S_i is the market share occupied by the i-th enterprise. It is generally believed that if the industry concentration ratio CR₄ or CR₈ < 40, the industry is competitive; and if 30 ≤ CR₄ or 40 ≤ CR₈, the industry is oligopolistic.

According to the CR_n index, the market share of four cities: Almaty, Astana, Simkinent and Akmola is equal to 30 ≤ CR₄, which is a typical oligopolistic type, indicating that the other 16 prefectures and states of Kazakhstan still have great market potential and development space.

Problems existing in the tourism market structure

At this stage, the development of Kazakhstan's tourism market is very immature, and there is still a big development gap in terms of industrial scale and efficiency. There are many reasons for this imperfect situation. One of the main reasons is that the internal development and industrial structure of Kazakhstan's tourism industry still have problems such as uncoordinated and unreasonable problems. Structural issues are core issues in the development of tourism in Kazakhstan.

Table 2 – Domestic tourism indicators from 2018 to 2022

year destination	2018	2019	2020	2021	2022
all	4 695 942	5 286 782	3,328,614	5,145,217	6,407,318
Abay			-	-	264 830
Akmola	324 951	376 434	235,014	324,819	427 212
Aktobe	112 150	118 980	79,233	136,931	155 037
Almaty	805 836	829 431	482,186	607,409	351 677
Atyrau	141 914	175 088	67,955	42,876	137 004
West Kazakhstan	79 749	x	36,523	69,592	87 623
Zhambyl	116 996	139 260	92,922	125,776	132 840
Zhetysu			-	-	323 521
Karaganda	260 895	298 465	193,215	262,858	289 392
Kostanai	192 845	215 129	134,661	202,132	199 909
Kyzylorda	60 120	x	50,416	94,167	95 532
Mangystau	212 078	x	152,148	279,954	268 879
Pavlodar	139 967	x	67,643	131,305	180 731
North Kazakhstan	115 274	x	100,500	151,327	135 788
Turkestan	145 277	x	102,512	205,047	245 667
Ulytau			-	-	25 009
East Kazakhstan	536 184	582 948	346,099	477,660	342 490
Astana	575 906	635 571	357,292	673,100	939 894
Almaty	719 854	898 531	624,982	1,057,560	1 392 015
Shymkent	155 946	215 951	205,313	302,704	412 268

Note: compiled on the basis of primary data (Kainazarova D.A., Baimagambetova L.K.2019)

(1) The organizational structure of the tourism industry is unreasonable and lacks a market competition mechanism.

Kazakhstan's tourism industry is under state protection, and domestic enterprises enjoy operating privileges. There is a lack of introduction of incentive mechanisms, and the enthusiasm of all parties has not been fully mobilized. Tourism enterprises have a small national scale and low operating efficiency. More than 67% of the Kazakhstan tourism market are small enterprises, 23% are medium-sized enterprises, and 10% are large enterprises (Wu Bihu, Song Ziqian. 2009). There are more than 70 tourism market service organizations with foreign participation. Data show that most tourism companies are located in Almaty, Astana, Simukent, Almaty Oblast and Akmola Oblast. Tourism enterprises have not truly entered the market and have become entities that operate independently and are responsible for their own profits and losses. Behaviors such as evasion of responsibilities and market supervision often occur. This situation restricts the self-development of enterprises.

(2) Unscientific planning and environmental damage occur from time to time

In the planning of the tourism development stage, special protection measures for environmental

factors are not considered, and phenomena such as the destruction of natural and cultural heritage protection and high-energy waste occur from time to time. Due to financial difficulties, some scenic spots have little material investment in tourist facilities, and projects with large investment cannot be developed, so they have to make do with simple things, resulting in incomplete facilities. For example, the transportation in some tourist attractions is not convenient enough, and the delivery and information communication are also imperfect. These have seriously restricted the sustainable development of Kazakhstan's tourism market.

(3) Unbalanced regional development

Modern tourism is based on the unique tourism and leisure potential of the Republic of Kazakhstan. However, the development of tourism is constrained by some typical problems of almost every region, the lack of high-quality hotel and entertainment infrastructure, low service levels, environmental conditions of natural areas poor marketing organization, unfavorable business environment, and inadequate legal framework to attract private investment. The consequence is that the domestic promotion of tourism products and the development of inbound tourism are weak, which directly affects the tourism market structure.

Measures to improve the tourism industry market

1. Actively introduce foreign investment and advanced technology and equipment, improve various supporting facilities related to tourism services, and comprehensively promote the construction of major tourism infrastructure projects, including tourism transportation facilities, tourism communication facilities, tourist distribution centers in key cities, tourist service centers, Tourism infrastructure such as tourism safety facilities and resource and environmental protection facilities. Strengthen the construction of a comprehensive tourism transportation system. Accelerate the construction of tourist feeder roads from central cities, trunk roads, airports to key tourist attractions.

2. The structure of the tourism industry should be optimized. At present, the tourism industry structure is still dominated by cities, with scenic spots as the center and a linear tourism model dominated by travel agencies. This model can no longer meet the needs of modern travel consumers. In order to optimize the industrial structure,

It is necessary to launch innovative tourism products and services, such as homestays, specialty food, experiential tourism, cultural tourism, etc., to enrich the product supply of tourist destinations and meet the needs of tourists.

3. To implement the tourism brand strategy. The brand influence of the tourism industry is an important factor in attracting popularity and improving industry competitiveness. Building a strong tourism brand requires starting from many aspects, including improving the image of tourist destinations, improving market supervision and service levels, and improving tourism infrastructure. At the same time, tourism marketing also needs to increase investment and use advanced technological means such as the Internet and new media to increase the exposure and market awareness of tourism products.

4. Encourage the development of tourism enterprises and accelerate the reform of tourism enterprise systems and mechanisms

Cultivate large-scale tourism groups, support the development of small and medium-sized tourism enterprises, actively support the development of small and medium-sized tourism enterprises, give full play to their advantages in independent entrepreneurship and employment, and consolidate the foundation for industry development. Guide and support small and medium-sized tourism enterprises to improve their business management level and their

own market development capabilities, implement the informatization promotion project of small and medium-sized tourism enterprises, and accelerate the construction of service systems for small and medium-sized tourism enterprises.

5. Strengthen tourism talent training and team building. Tourism is a kind of human resources. The quality and quantity of talents are crucial to the development of intensive industries. Nowadays, the tourism industry generally faces the problems of low-quality employees and unstable service levels.

In order to solve this problem, it is necessary to increase investment in tourism talent training and improve training efficiency, professional capabilities and service levels of industry personnel. At the same time, it is also necessary to strengthen the development of tourism. Individual vocational education and training to cultivate travel management talents with more innovative spirit and international vision

Optimization path

1. Improve tourism market policies and supervision systems.

Tourism development is inseparable from government support and guidance. The government should formulate relevant tourism industry policies and regulations, provide strong policy guarantees and support measures for tourism enterprises and practitioners, and create a good market environment and development opportunities for talents. At the same time, the government should also strengthen the development of tourism. Strengthen supervision of the tourism industry, standardize market order, severely crack down on illegal tourism operations and unhealthy competition, and develop and maintain fair market competition.

2. It is necessary to strengthen the coordinated development of tourism and other related industries.

There is a close correlation between tourism and catering, transportation, accommodation and other industries. Promoting the development of the tourism industry requires strengthening cooperation and coordination between the tourism industry and related industries, and forming a cooperative relationship of capital resource sharing and mutual benefit. Through mutually beneficial cooperation, we can achieve a win-win situation in the industry, optimize chain configuration, and enhance the overall competitiveness of the entire industry.

3. Shift from the development trend to the direction of personalized, diversified, intelligent and green development.

Personalized travel is becoming increasingly popular among tourists, who demand more personalized travel plans and services. Tourism diversification means that the main products in the tourism market will shift from traditional tourist attractions to tourism experience, cultural exchanges and other aspects.

4. Take the path of tourism industry cluster development

Important reasons for promoting tourism industry clusters are their competitiveness, the availability of facilities attractive to tourists, and the ability to increase the number of tourists and promote the development of transportation, culture, trade, hotel business and other sectors. Kazakhstan already has all the prerequisites for the development of tourism on the basis of industrial clusters, namely the attractiveness of historical architectural monuments, health resorts, nature reserves and the development of cities into financial, educational and cultural centers. Cluster development has contributed to the development of the construction, transportation and entertainment industries by increasing the amount of capital as investment in the country. At the same time, the cluster will contribute to the sustainable development of various regions and develop potential tourism resources. The competitive advantage of Kazakhstan's tourism industry lies in its unique culture, rich natural ecological environment, active business activities, leisure sports and frequent international festivals.

5. Facilitation of visa policies

Further liberalization of visa policy will be achieved through the introduction of an electronic system ("e-hotel") for the collection, processing and analysis of temporary accommodation information of foreign tourists. Further expand the current policies of new target market countries and the list of "electronic visa" countries.

6. Establish an incentive mechanism for tourism development

Through various preferential and reward systems, an incentive mechanism is formed for the agglomeration of the tourism industry, and a certain degree of tax preference is implemented for fixed asset investment projects, designated units of tourism commodities, designated units of tourist snacks, travel agencies and other tourism enterprises and related enterprises.

7. Enterprise innovation mechanism

Kazakhstan's tourism market innovation refers to the continuous self-adjustment and self-improvement of enterprises engaged in tourism

development to adapt to market demand and the requirements of the times in terms of product quality, level, market efficiency, service quality, etc. Its specific content: continuous institutional innovation, product type innovation, product subject innovation, management innovation, etc. based on changes in the tourism market and macro-environment. Innovative concept: guide consumption and form the market (Wu Bihu, Song Ziqian 2009)

8. Transnational business model

It is mainly aimed at border business cooperation zones, such as the China-Kazakhstan Horgos Border Cooperation Zone, the border between Kazakhstan and Russia, the border between Kazakhstan and Uzbekistan, the border between Kazakhstan and Kyrgyzstan, the international Altai region, and the Central Asian section of the Silk Road. (Zh.N. Aliyeva*, A.B. Kaliyeva, et al., 2019) Transnational business model. Achieve the win-win goal of complementing resources and maximizing profits.

9. Establish a special government fund for tourism development

It is allocated annually by the government to focus on the development of the tourism industry and related products, such as the development, production and sales of tourism products, the publicity, promotion and marketing of tourism products, the planning of tourism brands, and the certification and introduction of tourism practitioners. and training, establishing a tourist complaint linkage mechanism and other key projects □

Conclusion

In the new stage of development, Kazakhstan's tourism industry is in a critical period of development, with both important development opportunities and severe challenges. Kazakhstan's tourism industry is in a "market transformation period, a period of prominent contradictions, and a period of management improvement." It is faced with the arduous task of optimizing the market structure, changing the growth mode, and improving the quality and level of development. It urgently needs to transform from extensive management to intensive management. Transformation from quantity expansion to quality improvement, from meeting people's basic travel needs to providing high-quality tourism services, while at the same time stimulating regional economic development and expanding job responsibilities.

To sum up, the optimization path of the tourism market involves the tourism industry structure and

scientific planning, brand strategy, talent training, policies and regulations, industrial collaboration and other fields. Only through full optimization and adjustment can the competitiveness and sustainable development of the tourism industry be improved.

All of the above can lead the tourism sector of the country, as stated in the Concept of development of the tourism industry of the Republic of Kazakhstan for 2023-2029 to the following advantages (Zhang Heqing, Wang Leilei, Tian Xiaohui. " *Economic Geography* no 30 (12). (2010): 2116-2121.

The culture of entrepreneurship among the general population, the conduct of family, small and medium-sized businesses, including through the implementation of anchor tourism projects in priority tourist territories (hereinafter – PTT) will be developed.

The number of domestic and incoming tourists to Kazakhstan will reach the planned targets, due

to the increased number of incoming tourists, the export of services according to the classification of "Trips" will increase.

The state will create favorable conditions for attracting investments in the industry, the growth of which in accommodation and catering services will reach about 260 billion tenge.

Priority tourist territories will be provided with high-quality engineering, transport and tourist infrastructure. The issue of ensuring that the needs of tourists in tourist places are met will be resolved.

The country will be recognizable in the regional and global markets due to active country marketing. There will be a strategy that allows you to highlight the country on the map, and popularize not only inbound, but also domestic tourism. In the WEF Ranking on the global Travel and Tourism Development Index, Kazakhstan will enter the TOP 50 countries and much more.

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