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INTERDEPENDENCE OF TOURISM DIVERSIFICATION
AND REGIONAL DEVELOPMENT FEATURES OF KAZAKHSTAN

Abstract. This work is aimed at identifying of the interdependence of tourism and regional features of Kazakhstan development. To achieve the set goal, the methods of system approach, scientific abstraction, analysis, synthesis, and comparison were applied. The paper shows the most perspective regions and trends of tourist activity, and assesses the contemporary state of tourism in Kazakhstan regions. To estimate the diversification correlation of tourism by regional features, the social and economic indicators of regions development were considered. The results of the research showed that tourism development in Kazakhstan regions is extremely uneven. As a consequence of this, the authors have determined several macro-regions that have its own pronounced features – South, North, Central-East, West regions, and Almaty, and Astana cities. It is shown that tourism diversification in each of them should be oriented on its factors.
Keywords: diversification, tourism, regional development, tourist destinations, macro-regions, agglomeration.

For tourist activity, the diversification is of special status as this field is subjected to influence of political events, economic stability in regions of tourist destination, and demographic changes in countries where tourism enterprises are located. The countries where tourism field is well-developed, the enterprises are usually ready for outside changes, they form the development strategy considering the diversification of tourist service package, geographic markets, techniques and technology of tourism. The operation in changing environment is much more difficult for enterprises in countries with poor developed tourist infrastructure, for instance, in Kazakhstan.

Development of Kazakhstan regions is determined by the following factors:

1. Program of regions development until 2020 (later on, Program). It is one of the instruments to implement the Anticipated scheme of territorial and spatial development of the country until 2020, adopted by the Decree of the President of the Republic of Kazakhstan on July 21, 2011, #118.

2. Regional development is centralized as regions receive funds from the governmental budget and are controlled by a special body.

3. Low level of urbanization in comparison with developed countries – about 55-58% comparing to 75-85%.

4. Regions are grouped into four macro-regions basing on economic, nature, social and demographic parameters. These regions are: North, Central-East, South, and West regions. Along with macro-regions there are cities of national status – Almaty, and Astana. The largest contribution into the national economy – 23.8% comes from Western region, the South region has the largest portion of population – 37.7%, the most urbanized region – 69.7% is Central-East.

Basing on the region features, we have made a table of the most prospective tourism fields that can be developed (Table 1). Three-point rating system is applied, where 0 – unpromising field, 1 – possible, but requires additional investments, 2 – most promising.

According to the Program the largest GDP share comes from the West region and Almaty city, the least is from agricultural South, and North regions. However, the most effective contribution is from Almaty – the city contribution to GDP is almost the same as from the whole West region. This is due to

high diversification level of Almaty economy. And agricultural and production sectors are not able to provide enough amount of jobs [1].

Thus, the largest amount of jobs comes from the service sector. Considering the potential of tourism in Kazakhstan, significant increase to the service sector can be provided by tourism. Let's consider regional features of Kazakhstan in terms of tourism development.

Table 1 – Prospective trends of tourism activity in the Republic of Kazakhstan

Region	Type of tourism									
	Cultural and entertainment	Ethnical	Business	Treatment	Religious	Sport	Ecological	Rural	Eventful	Sub-total
Akmola	1	0	2	0	0	0	2	0	1	6
Aktyubinsk	1	2	2	0	0	0	2	1	0	8
Almaty	2	2	2	2	0	2	2	1	1	14
Atyrayu	2	2	2	1	0	0	2	1	0	10
West Kazakhstan	0	0	0	0	0	0	1	1	0	2
Zhambyl	2	2	0	2	2	0	2	1	0	11
Karaganda	0	0	2	0	0	0	2	0	0	4
Kostanay	1	1	0	0	0	0	2	1	1	6
Kyzylorda	2	2	0	0	0	0	2	1	0	7
Mangystayu	0	2	1	0	0	0	2	1	0	6
South Kazakhstan	2	2	1	2	2	0	2	2	0	13
Pavlodar	2	1	2	1	0	0	2	0	1	9
North Kazakhstan	1	1	0	0	0	1	2	1	0	6
East Kazakhstan	2	1	0	2	0	2	2	2	0	11
Astana city	2	1	2	1	1	2	0	0	1	10
Almaty city	2	1	2	2	0	1	0	0	2	10
Total	22	20	18	13	5	8	27	13	7	133
Note: made by the author basing on [1], [2]										

Table 1 allows to determine the most prospective regions and fields of tourism activity. Basing on the Table the most promising are ecological, cultural-entertainment, ethnical, and business tourism. The most prospective regions are Almaty, South-Kazakhstan, East-Kazakhstan, Zhambyl regions, and Almaty and Astana cities. However, it is necessary to consider that these are generalized indicators, and there are also opportunities for development of other types of tourism. For instance, Turkestan town located on the territory of Kazakhstan is attractive field for religious tourism due to its rich history and remained Muslim and Turkic monuments.

The Southern macro-region has high population density, but low urbanization level – 37.7% that will definitely result in population flow into the cities. This is the most integrated region owing to the project "West Europe-West China". The region extends from Tien Shan to Aral Sea, Aral Kara Kum and Balkhash Lake. The region is distinguished by a wide variety of relief, biome, and natural zones. It borders with Uzbekistan, Turkmenistan, Kyrgyzstan, and China that determines parameters of tourist flows to some extent.

The region has large opportunities for the following types of tourism:

1. *Ecological:* Issyk, Turgen Lakes, Kora river, Burkhan-Bulak waterfall, Charyn Canyon, Kolsay Lakes, Altyn-emel national park, Balkhash Lake, Karatayu mountains.

2. *Cultural and entertainment:* Saka burial mounts, Turkestan, Yesim Khan mausoleum, Sayram, Otyrar national archeological reserve museum, Kyuruk-Tobe diggings, Kok-mardan, Baba-ata mosque-mausoleum, "ART&SHOCK" theatre, Abay Opera and ballet theatre, Republican German Drama Theatre, Central State Museum of the Republic of Kazakhstan, A. Kasteyev Republican Art Museum, Ikylas Musical Instruments Museum, Kyurmangazy Kazakh State Philharmonia.

3. *Religious:* Turkestan, Yassayuyi mausoleum.

4. *Medical and health:* Sary-Agash, Merke, Chyundzha etc.

5. *Rural:* low urbanization of the region allows for creating rural tourism at villages.

6. *Sport:* Kara-Kum, Khan-Tengri, Zailiyskiy Alatau, Medeo skating ring, Shymbulak ski resort.

Low urbanization level, at the same time, causes the problems with infrastructure and qualified personnel. Development and diversification of tourism are connected, first of all, with solving of these two problems.

The Western macro-region is located in the north-west part of the Republic. It is bounded by the Ural Mountains in the north, Turkmenistan deserts in the south, Aral Sea in the east, and Caspian Sea in the west. The topography is mainly plain with sharp continental climate and temperature difference in various seasons – 90 Celsius degree. The region borders with Russia cities that creates definite conditions for tourists' exchange.

The Western macro-region is distinguished by the availability of oil- and gas production industry, and outlet to the Caspian Sea. The most promising fields of tourism by types are:

1. *Ecological:* Great Silk Way, Ustyurt natural reserve, steppe zones, Inder and Aralsor Lakes, Caspian, and Aral Seas.

2. *Cultural and entertainment:* cave paintings-poems, Fort Shevchenko, archeological monuments of Saraychyk, Artyk mausoleum, monuments of Dead Kultuk, Khanga-baba necropolis.

3. *Religious:* Beket-Ata, Shakpak-Ata, Shopan-Ata, Masat-Ata mosques.

4. *Medical and health:* health resorts on the coast of the Caspian Sea.

The Caspian Sea is a potential source of tourists from bordering States. The problem is that the sea port is quite far from the most competitive tourist zones of Kazakhstan.

The Central-East macro-region is highly urbanized, industrially developed, has attractive tourist zones. It borders with China, South, North, and West regions. It has the whole diversity of natural zones of Kazakhstan: sand-clay deserts, clay canyons, steppe zones, mountains, forests, taiga, and alpine meadows. It is also the most bio-diverse region of the country as includes 24 national parks.

Promising tourist fields:

1. *Ecological:* Kazakhstan Altay, Rakhman springs, Berel glaciers, Zaysan, Markakol, Alakol, Balkhash lakes, Karkaraly mountainous-forest oasis, Ulytayu mountains, Sary-Arka steppe, Komsomol peak.

2. *Culture and entertainment:* ruins of mountain fortresses and settlements at Altay, Aktasty burial mound, Karasyu winter camp, Ak-Beket, Shon, Klysh, Akhmetzhan mazars.

3. *Ethnical:* red deer farms.

4. *Sport:* mountain rivers, extreme ski trails.

Among the key problems is remoteness of tourist places from big cities, complex travel, poor infrastructure, expensive accommodation at rare hotels. Tourism development is mostly probable if the infrastructure is developed.

The Northern macro-region is focused on production of bread wheat. It borders with Russia in the north, the Ural mountains in the west, with plain steppe of Irtysh in the east. The territory is mainly plain.

Promising tourist fields:

1. *Ecological:* Byurabay, Kyusmurun, Korgalzgyn lakes, Kokshetayu mountains, national park "Byurabay", Bayan-Ayul caves, Korgalzhy national nature reserve, Nayurzum nature reserve.

2. *Medical and health:* Moyildy, Maybalyk lakes.

3. *Cultural and entertainment:* archeological sites at flood plain of Ishim, Chaglinka, and Iman-Byurlyk, historical monument Botay, Arkalyk.

Astana – is the capital of the Republic, and this fact determines the volume of investments into the city: infrastructure, culture, construction, education and science, and finances. Astana is a potential center of agglomeration, and, consequently, of city tourism.

Almaty is the biggest megalopolis of the country, former capital having significant cultural and historical heritage. In addition, the city location is geographically attractive and can receive tourists interested in mountain skiing and extreme sport. Besides, the economic base of the city is service sector [3].

The main trend of contemporary economic diversification is appearance and development of agglomerations. Development of agglomerations in the developing countries has its own specifics – population is concentrated in few leading centers. Uncontrolled migration causes overload of housing infrastructure resulting in appearance of social marginalization zones, disturbance of jobs balance and

obstruction of diversification. Example is favelas in Brazil. Such zones increase the growth of criminal threat, and decrease the educated portion of population.

Cities are the diversification sources including tourism diversification. These allow creating the cultural and social capital, and develop creative fields that also increase the tourists flow. The risk of marginal zones appearance in a city decreases significantly the tourist attractiveness of the city; an example is Naples in the south of Italy. The city has rich history and culture, but tourists complain about crime situation and dirtiness of the city.

The most attractive cities for migration in Kazakhstan are, first of all, Almaty and Astana; there are a lot of historical and cultural beauty sights, and developed infrastructure. Due to this fact, the major part of tourists is concentrated in these cities. Those also can be used as an example for tourism diversification in other big cities and regional centers, such as Shymkent, Karaganda, Ust-Kamenogorsk, Semipalatinsk, and Uralsk.

The volume of services by regions for 2017 is shown in Figure 2.

The Figure shows that the cities of the national status received the largest amount of visitors. And, as it was mentioned above, a half of visitors come with business or professional issues. Almaty and Astana possess the largest business, financial, scientific, cultural centers attractive for visitors. The least visitors were observed in Kyzylorda, North-Kazakhstan, Zhambyl, and Kostanay regions. This is explained by poor tourism attractiveness of the cities, and by unfamiliarity or hard access to touristic beauty sights at these regions.
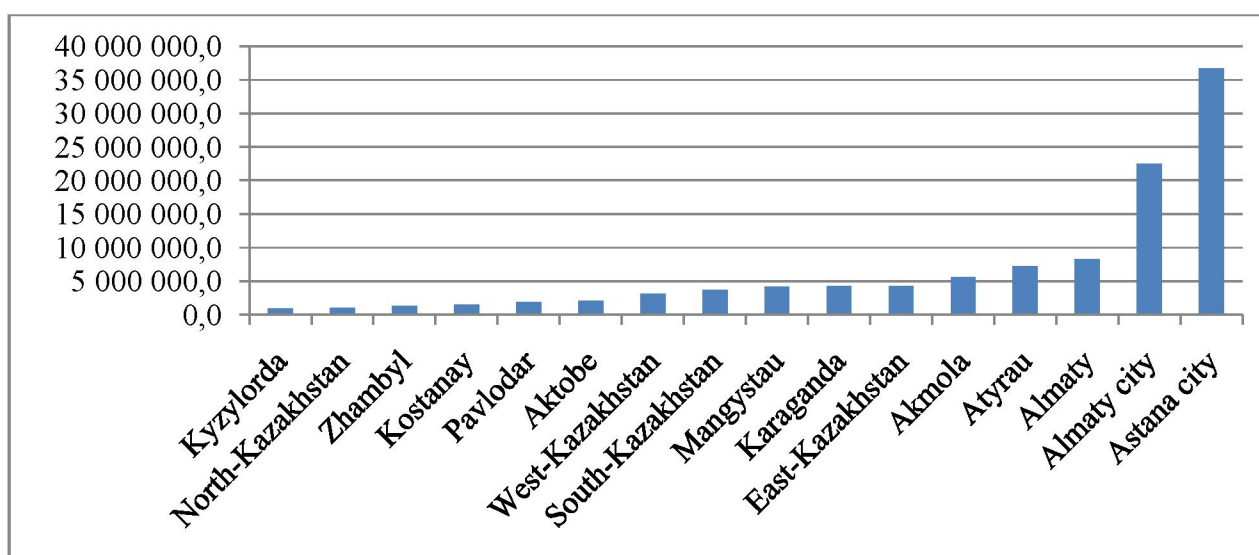
Note: reference [3]

Figure 2 – Volume of services rendered by regions in 2017
(thousands tenge)

The highest level of beds occupancy in 2016 was observed at the following regions: west Kazakhstan – 29,5%, Atyrayu – 27,6%, east Kazakhstan – 26,8%, and Aktyubinsk – 24,3%. The lowest occupancy rate was in Zhambyl (15,6%) and Akmola (17,3%) regions. Hotel occupancy rate in Astana and Almaty cities was 27,6% and 28,2%, respectively.

By regions: 47,1% visitors were serviced in Astana (17,4%), Almaty (18,8%) cities, and in the East-Kazakhstan region (10,9%), although in 2013 the mentioned regions serviced 47,7% visitors [3].

Thus, the contemporary state of tourism in Kazakhstan regions can be described by the following statements:

1. The goals structure of visitors indicates domination of business and professional interests, and much less visitors come for tourism. More than a half come to Almaty and Astana cities.

2. Diversification of tourism in regions is possible via development of infrastructure and appearance of full-fledged market of touristic services. And development of touristic service market is possible if regions urbanization is increased.

3. Diversification factors are different for every macro-region. The Southern has high urbanization potential and infrastructure development owing to Chinese projects, the Northern has capital agglomeration and attractive natural zones, the Central-East is distinguished by high level of urbanization, and the Western has the outlet to the sea.

4. The strategy of regional development strives for creation of agglomerations that in future can form an additional base for tourism via creation of cultural and historical beauty sights.

To estimate the tourism diversification correlation with regional features of development let's consider the following social and economic indicators of the regions: population; GRP per capita; investments into the basic capital; volume of services rendered by accommodation places; number of serviced visitors; occupied population at regions related to tourism (Table 2).

Table 2 – Data for correlation analysis of tourism diversification

Region	Population (persons)	GRP per capita (thousands tenge)	Investments into basic capital[1] (thousands tenge)	services volume rendered by accommodation n places (тыс. тенге)	number of serviced visitors (persons)	occupied population (thousands person)
Akmola	734 369	1 951,5	224 427 039	5 656 946,1	341 399	8,5
Aktyubinsk	845 679	1 330,8	355 652 890	2 078 793,3	100 450	6,3
Almaty	1 983 465	1 878,5	475 648 239	8 280 288,8	703 663	16,6
Atyrayu	607 528	870,2	2 221 164 681	7 192 536,3	184 353	6,1
West Kazakhstan	641 513	6 274,3	335 387 698	3 121 014,4	112 321	6,3
Zhambyl	1 115 307	2 448,3	202 410 035	1 258 402,0	103 912	3,8
Karaganda	1 382 734	772,9	294 009 363	4 226 003,2	292 509	10,9
Kostanay	879 134	2 086,0	179 751 515	1 506 394,8	192 174	5,9
Kyzylorda	773 143	1 432,0	189 918 748	933 647,9	59 192	5,3
Mangystayu	642 824	1 349,7	382 308 581	4 154 705,1	205 904	4,8
South Kazakhstan	2 878 636	2 869,8	417 014 574	3 652 733,9	269 974	14,8
Pavlodar	757 014	744,1	389 179 760	1 852 259,7	147 485	9,1
North Kazakhstan	563 300	2 101,0	163 322 436	1 000 726,3	120 847	4,0
East Kazakhstan	1 389 568	1 229,2	312 975 733	4 278 273,5	486 157	5,6
Astana city	972 692	1 506,3	788 390 899	36 687 488,0	989 205	11,9
Almaty city	1751308	3 892,8	539 519 463	22 479 547,1	969 861	15,3
Note: reference [3] [1]January – November, 2017						

Some significant correlation is observed between the indicators "Population" and "Occupied population at regions related to tourism" (0.76); "GRP per capita" and "Volume of services rendered by accommodation places" (0.6). There is also some relation between the number of serviced visitors and GRP per capita (0.68). Positive influence of tourism on economic indicators of the regions is definitely clear. There is no significant correlation between the investments and volume of rendered service (0.29), number of population and volume of rendered services (0.14), i.e. independently on the region the investments into the basic capital almost do not influence on development of tourism confirming small volume of investments into tourism or its low effectiveness.

Thus, the conducted research allows for the following conclusions.

Regional development of Kazakhstan is extremely uneven. It is so uneven that makes necessary to distinguish macro-regions with its own pronounced features. Diversification of tourism in each of them should focus on its factors [4].

For the Southern region the most appropriate strategy is culture-entertainment, and ecological tourism requiring developed transport infrastructure to deliver tourists to historical and nature places, and availability of comfortable accommodation nearby. In addition, it will be necessary to have some qualified specialists in the field of history, ethnology, and historical geography to create information material and arrange excursions that are of high importance considering the information demand among tourists. Substantial aid could be rendered by digitization of transport system, and participation of tourist companies in the international apps for tourists. Indirect support in the form of the national adoption of

digital educational certificates on history and historical geography of the region could increase the number of employees in excursion and historical tourism.

The largest potential for Western region is nautical tourism – this region could receive foreign tourists travelling by the Caspian Sea. In addition, there is some potential for creation of enterprises engaged in boat trips to adjacent countries. Utilization of online stores in English, Russian, and Kazakh by tourist companies will increase the information accessibility on tours and will make them possible for purchase for foreign tourists.

Development of tourism in Central-East region should be focused on improving roads infrastructure to places attractive for tourists, and on stimulation of sound market competition among accommodation facilities to reduce prices and enhance the service quality. This stimulation, first of all, should start from support of enterprises creating the accommodation facilities. In addition, it is necessary to have qualified personnel in the field of regional ethnography, extreme tourism able to present properly the tourist places for travelers. In this regard, of high significance is digitization of local maps, ability of free gps-navigation of tourist groups, detailed information on places available for tourists' accommodation and rest [5].

Tourism development in the north region is distinguished by small information on possible tourist destinations for travelers, and poor tourist market. In addition, there are problems with road-transport infrastructure. The best option here is increase of online stores with information on tours and available tourist destinations.

Almaty and Astana cities are appropriate for culture-entertainment and ecological tourism; the cities already possess developed transport infrastructure, enough number of accommodation places and culture-entertainment enterprises. Eventful tourism is being developed. The biggest problem of these cities is its low popularity among tourist community and poor knowledge on unique tourism opportunities in these cities. To solve the problem it would be enough to increase the involvement of tourist companies into online tour sale, and translate the web-sites into English to attract foreign tourists.

The common problem for all regions is low qualification of tourist staff, poor interaction among companies related to tourism, poor marketing, underdeveloped infrastructure, small amount of statistic data on tourism field. A way out is infrastructure support on the national level and decrease of influence on small and medium business that will serve as main engines of diversification. It is necessary to acquire information on the number and activity of tourism enterprises: income, number of clients and/or sold tours, main tourist destinations. Small enterprises able to arrange specialized, but completely arranged and informative tours will be able to attract foreign tourists using the Internet, advertisement and marketing at big cities of the country.

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ТУРИЗМДІ ӘРТАРАПТАНДЫРУДЫҢ ҚР ӨҢІРЛІК ЕРЕКШЕЛІКТЕРІМЕН ӨЗАРА БАЙЛАНЫСЫ

Аннотация. Жұмыстың мақсаты туризмді әртараптандырудың Қазақстан Республикасының өңірлік ерекшеліктерімен өзара байланысын анықтау болып табылады.

Аталған мақсатқа жету үшін жүйелік тәсіл, ғылыми абстракциялау, талдау және ситез, салыстыру әдістері қолданылды. Мақалада туризмді дамытудағы анағұрлым болашағы бар өңірлер және туризм бағыттары анықталды. Қазақстан өңірлеріндегі туризмнің заманауи ахуалына баға берілді. Өңірлік ерекшеліктер және туризмді әртараптандырудың корреляциясын бағалау мақсатында өңірлердің әлеуметтік-экономикалық көрсеткіштері қарастырылған. Зерттеу нәтижелері көрсеткендей, Қазақстан өңірлеріндегі туризм тым әркелкі дамуда. Сондықтан, авторлар нақты ерекшеліктері бар макроөңірлерді бөліп көрсеткен – Оңтүстік, Солтүстік, Орталық-шығыс, Батыс өңірлері және Алматы, Астана қалалары. Олардың әрқайсысындағы туризмді әртараптандыру өз факторларына сәкес іске асырылуы тиіс екендігі көрсетілген.

Түйін сөздер: әртараптандыру, туризм, өңірлік даму, туристік бағыттар, макроөңірлер, агломерация.

УДК 338.48

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**ВЗАИМОСВЯЗЬ ДИВЕРСИФИКАЦИИ ТУРИЗМА
С РЕГИОНАЛЬНЫМИ ОСОБЕННОСТЯМИ РАЗВИТИЯ РЕСПУБЛИКИ КАЗАХСТАН**

Аннотация. Целью работы является идентификация взаимосвязи диверсификации туризма с региональными особенностями развития Республики Казахстан. Для достижения цели использовались методы системного подхода, научной абстракции, анализа и синтеза, сравнения. В статье определены наиболее перспективные регионы и направления туристической деятельности. Дана оценка современному состоянию туризма в регионах Казахстана. В целях оценки корреляции диверсификации туризма региональными особенностями, рассмотрены социально-экономические показатели развития регионов. Результаты исследования показали, что туризм в регионах Казахстана развивается крайне неравномерно. Вследствие этого, авторами выделены макрорегионы, каждый со своими ярко выраженными особенностями – Южный, Северный, Центрально-восточный, Западный, и города Алматы, и Астана. Показано, что диверсификация туризма в каждом из них должна ориентироваться на свои факторы.

Ключевые слова: диферсификация, туризм, региональное развитие, туристические направления, макрорегионы, агломерация.

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