

Priority directions and trends of the business sector in tourism: the case of Kazakhstan

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Abstract. The relevance of the topic - the development of the tourism industry provides opportunities for economic development for countries. Tourism is one of the fastest-growing industries worldwide, as evidenced by its development indicators. Tourism and hospitality are important economic activities, both for individual countries and regions. The purpose of the research is to determine the state policy stimulating the sustainable development of the tourism industry, which in turn implies a systematic analysis of the tourism industry, the identification of the determinants of its development and the determination of policy priorities at the national and regional levels. The subject of the research is the policy of sustainable development of tourism and its implementation mechanism in Kazakhstan. The object of research is the impact of tourism policy on the functioning of economic entities and, accordingly, on the economic development of the country. Results. The formation of the correct, pragmatic tourism development policy stimulates the positive effects of the tourism industry, the growth of residents' incomes, the creation of jobs, the generation of taxes, the inflow of foreign currency, the production of goods and services in other adjacent sectors, and the economic development of the country (region). At the same time, the right policy ensures the limitation of such possible negative effects as negative socio-cultural impact, environmental pollution, reduction of economic benefits of residents, overcrowding of the coastline, tourist destinations and so on.

Keywords: Tourism Industry · Private Sector · Government Policy · Sustainable Development · International Tourism.

1 Introduction

Tourism policy, as a society-oriented progressive course, is a set of actions, directions, directives, principles and processes within an ethical framework, which, with targeted planning, promotion of development, stimulation of the production of goods

and services, using the principles of sustainable development, creates the basis for the development of the industry [1, 2].

The function of tourism policy is to provide an environment for stakeholders, which will allow economic subjects to obtain the maximum effect in case of healthy functioning and limit negative consequences [3]. The direct or indirect impact of the policy extends to stakeholder groups, central, regional and local governments, tourists, operational sectors of the tourism industry such as accommodation, attractions, food services, transport, tourism services, destination management organizations, etc. [4, 5].

The aim of the paper defined the following tasks: Study of objective guidelines for the formation of a rational policy of tourism development; Revealing the contradictions in the effective implementation of tourism development policy in a rapidly changing environment; Assessment of modern trends in the development of the tourism industry and their impact on the economy; Study of the methodology for determining the indicators for the evaluation of the results of the tourism industry; Analysis of the competitiveness of the tourism industry in the Central Asian region to determine the orientation of tourism development policy in Kazakhstan; Determining the priorities of the tourism development policy and forming the appropriate environment for their implementation; Assessment of the role and importance of the tourism industry in the development of the economy of Kazakhstan.

As a result of theoretical and practical research within the framework of the work, the following scientific innovations have been obtained:

- Methodological aspect: an attempt to limit the entire spectrum of the field of tourism;
- From a theoretical aspect: clarifying existing barriers in the field of tourism and determining ways to eliminate them;
- In the practical aspect: through reforming, the orientation of the economic policy on the factors that should contribute to the formation of the management system in the field of tourism, and the transformation of management in specific tourist organizations to increase efficiency;
- Implemented systematic research of tourism development policy, which is expressed in a complex analysis of various models of increasing the competitiveness and sustainability of tourism;
- General, traditional and modern theories and practices of change management adapted to the tourism sector and recommendations are formulated;
- It analyzed in a complex way the results of the planning and implementation of the tourism policy on entrepreneurial activity and local economic development in the Central Asian region;
- The paper examines tourism development strategies at the national and regional level, as well as presents the compatibility of international experience and opportunities for implementation in Kazakhstan;
- The methodology developed by the World Tourism Organization - Sustainable Tourism for Development in Developing Countries - was used to analyze the current state of the tourism sector in Kazakhstan, through which a detailed analysis of five key directions was made in Kazakhstan: 1. Tourism policy and governance; 2.

Economy, investments and competitiveness; 3. Employment, work and human capital; 4. Poverty alleviation and social inclusion; 5. Sustainability of natural and cultural environment.

As a result, based on the study of indicator systems for the assessment of the direct and indirect impact of tourism on the economy, we propose a mechanism for introducing a tourism satellite report in Kazakhstan.

From economic factors in the work [6], the author focuses on income, time and prices. It highlights the fact that the tourism and hospitality industry is highly elastic with respect to income. In other words, the high incomes of the population lead to an increase in the demand for tourism. He connects the mentioned factor with free time, which has been an important determinant of tourism demand for years. However, it can be said that in developed countries this issue is regulated according to the norms provided by the legislation.

According to the authors of this paper [7], there is a dichotomy in modern reality: "those with a lot of money and little time" and "those with little money and a lot of time". The third determinant is the price, which is one of the decisive factors in terms of influencing the demand for tourism. Because consumers make decisions based on the prices at the tourist destination. Due to the nature of the tourism industry, pricing issues are complex and complex. Since tourism services often include a combination of different services, it should be analyzed both as a whole package and as individual services. Demand for tourism is influenced by both competing tourist destinations and complementary products.

However, we cannot get a complete economic picture by analyzing these factors alone. Stabler, Papatheodorou and Sinclair [8] emphasize the fact that traditional demand theories do not allow us to explain what causes the formation of consumers' tastes, which factors cause changes, and most importantly, what is the social context of decision-making. According to the author [9], the metaverse can assist travel and hotel companies in enhancing their marketing campaigns. By using the metaverse, hotels and other hospitality-related businesses may improve their operational efficiency. "Architects" of tourism policy must take into account the mentioned factors, since the development of a tourist place depends on these factors to some extent.

However, some important questions are related to our research: How to get the maximum socio-economic benefits from the tourism industry? How to develop appropriate tourism policy and institutional support? Can countries attract investment in the tourism industry to increase social good, promote local businesses and create jobs by offering modern services?

To study the mentioned challenges, 5 main research questions were developed:

- o RQ 1: How to develop a tourism policy so that the business sector and society receive maximum socio-economic benefits?
- o RQ 2: How to develop the tourism industry based on appropriate government support?
- o RQ 3: How is domestic tourism conceptually related to the local economy?
- o RQ 4: Is there a correlation between tourism and countries' development parameters?

o RQ 5: How to promote the significant development of the tourism industry in order to preserve the natural environment, historical sites and cultural traditions in the country?

It should be noted that the existing scientific theories, systemic and situational approaches to the problem allow for in-depth analysis of the issues and obtaining appropriate practical results. Along with solving these issues with economic approaches, there is also a need to make certain political decisions.

2 Methods

As for the methodological and theoretical foundations of the research, the techniques of analysis and synthesis, induction and deduction, statistical, quantitative and qualitative research are used in the process of working on the paper.

The database used for the research is: Ministry of Tourism and Sports of the Republic of Kazakhstan, Ministry of National Economy of the Republic of Kazakhstan, Bureau of National Statistics Agency for Strategic Planning and Reforms of the Republic of Kazakhstan, World Bank, World Travel and Tourism Council, World Tourism Organization - official datas. Also, works of Kazakh scientists and foreign researchers published in international scientific publications.

In addition, a SWOT analysis of business entities involved in the tourism industry in Kazakhstan has been carried out. Small and medium-sized enterprises are one of the important drivers of the development of the tourism industry. Ensuring a stable business environment is vitally important for the mentioned entities since they represent an important source of the country's economic development, job creation, and tax generation. It is known that small and medium-sized businesses have special functions in terms of the economic development of the country. These functions are strengthening of competition mechanism, introduction of innovations, social function, etc.

3 Results and Discussion

3.1 The role of the government in the development of the tourism industry

The relevance of the tourism industry is increasing due to the nature of its dynamics. Its development in modern form was founded in the 20th century and plays an active role in economic, socio-cultural, integration of cultures, environmental and other directions.

Due to the fragmentation of the industry and its somewhat amorphous nature, it becomes difficult to accurately assess the impacts of tourism, therefore, to create appropriate information bases, which in turn limits the forecasting opportunities for both analysts and economic entities.

To determine the world trends of the tourism industry, it is important to analyze the qualitative and quantitative dynamics of the industry characteristics. Quantitative

analysis shows that the tourism and hospitality industry is a progressively growing sector worldwide. Tourism is an important economic activity, both for individual countries and regions, which ensures the improvement of the economic structure of the country, the region, the growth of jobs, tax revenues, etc.

In modern conditions, economic development is unimaginable without strengthening relations between countries, especially in the political and socio-cultural direction. The strengthening of the mentioned factors depends on political readiness and governmental activities [10]. The urgency of the issue increases in the case of developing countries, when government initiatives, attracting investments and infrastructure projects are given vital importance for the development of the country and the region.

The globalization process in the world, liberalization of visa barriers, development of vehicles and technologies gave more incentive to mass movements. Along with the growth of activities came the need for planning in short-term and long-term dynamics. In general, the main objective of planning is to utilize the positive effects of the tourism industry and limit the negative effects.

There is also a need for maximum coordination between government structures at different levels, this means establishing close contacts at the national, regional and municipal levels. We should especially highlight the municipalities that perform an important function in the regions. Their competence includes active work in the areas of standards developed by the state, issues related to zoning, infrastructure, services, taxes, environmental protection and other areas. Although the general plan is developed at the national level, its successful implementation depends on the active work of local government bodies and municipalities [5, 11-13].

Along with the governmental efforts, the activity and involvement of the private sector in the processes are the most important for the development of any sector. The government can play the role of a developer in terms of creating a healthy business environment, protecting property rights, developing the necessary legal norms for the regulation of the industry, while the private sector should play a dominant role in other directions.

The tourism business is particularly sensitive to current processes, therefore, establishing a stable business environment for its development is vitally important [14]. The government will not be able to invest in the private sector, but it should especially intensify work in terms of attracting investments, developing infrastructure, and maintaining a sustainable economic environment. The government also has the greatest responsibility in terms of training human resources, which is a prerequisite for the development of any sector. For this, it is necessary to actively work in the direction of planning training and raising qualifications.

3.2 SWOT-analysis of the tourism industry and main challenges in Kazakhstan

In modern conditions, tourism has become an important economic activity for both developed and developing countries. The tourism industry has great potential in terms of improving the country's economic structure, creating jobs, and attracting investments. The urgency of the issue increases in the case of developing countries that have rich cultural heritage and natural resources. The tourism industry can become a contributing factor to poverty alleviation and economic growth for developing countries.

It is well known that the benefits of the industry are spread evenly among different strata of society since the tourism industry is labor-intensive and closely related to adjacent sectors. To evaluate the development of the tourism industry, it is necessary to analyze the determinants of tourism development, the factors affecting it, and to justify whether these factors are different according to specific countries.

Based on the above, we will discuss the development opportunities of the tourism and hospitality industry in Kazakhstan, as well as the issues of tourism policy planning, local economic development, the impact of tourism on the economy, the promotion of entrepreneurial activities, the importance of government activities, and the development of infrastructure. For the sustainable development of the tourism and hospitality industry, it is necessary to identify the opportunities for the development of tourism in the country, the priority directions, as well as the subjective and objective obstacles that prevent its development.

To fully study the issue, the threats and advantages in Kazakhstan should be analyzed, the purposeful use of which will help to develop specific, different (more competitive) macro and micro strategies than competitors. From this point of view, an important challenge for Kazakhstan is the formation of a policy that ensures the synergy of the state, business, communication and infrastructure systems, which is a prerequisite for the sustainable development of the industry.

According to the statistical data of the last years (if we do not include the period of the COVID-19 pandemic), the growth trend is fixed in the world and the regions, both in terms of international arrivals and incomes. According to the data of 2023, the revenues received from international tourism amounted to more than 2.5 billion US dollars. It should be noted that after the 2019-2021 covid-pandemic crisis, revenues from international tourism increased dynamically. Despite economic fluctuations, the share of the tourism industry in the global economy has also increased, accounting for more than 10% of GDP, including direct and indirect effects. The industry also actively continues to create jobs, it is one of the leading industries in terms of employment. According to the data of the World Travel and Tourism Council in 2023, the number of employees amounted to more than 300 million. The volume of investment in tourism is steadily increasing worldwide, with over 1 trillion US dollars invested by 2023, accounting for about 5% of total investment.

International tourism (travel, transportation of passengers), includes 30% of world services exports, 6% of total exports of goods and services. In the category of world exports, tourism ranks fifth, after oil, chemicals, food and automotive products, with this indicator, tourism is in first place in certain parts of developing countries.

According to Table 1, it is clear that from 2000 to the present, the dynamics of the arrival of international visitors to Kazakhstan is characterized by an increasing trend. According to the data of the World Bank, international arrivals in Kazakhstan reached the 5 million mark for the first time in 2007. In 2018-2019, before the Covid-pandemic, the number of international visitors to Kazakhstan exceeded 8 million visitors.

Table 1. International tourism, number of arrivals (thousand people)

| | 2000 | 2005 | 2010 | 2015 | 2020 | 2023 |
|-------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| World | 1.330.000 | 1.500.000 | 1.760.000 | 2.070.000 | 2.400.000 | 2.500.000 |
| Kazakhstan | 1.683 | 4.365 | 4.097 | 6.430 | 2.035 | 1.400 |
| Uzbekistan | 302 | 242 | 975 | 1.918 | 6.749 | 5.200 |
| Tajikistan | - | - | 160 | 414 | 1.035 | 1.125 |
| Kyrgyzstan | 173 | 319 | 1.224 | 4.000 | 8.508 | 1.971 |

Source: World Bank data, 2023. [15]

This indicator shows that the indicators of attracting foreign visitors to the country are increasing. As the number of visitors increases, tourism revenues are on the rise, reaching more than \$3 billion by 2023.

Kazakhstan is the world's ninth-biggest landlocked country. Tourism's impact to the country's economy is now negligible [16]. According to 2023 statistics, the tourist sector contributed less than 7% to Kazakhstan's GDP. The Silk Road, nomadic life, and the Soviet Union all affected the establishment of Kazakh culture, making the nation appealing to travelers.

In Table 2, you can see the data of the world, Kazakhstan, Uzbekistan, Tajikistan and Kyrgyzstan according to the income from international tourism, from 2000 to 2020 (with 5-year intervals). It is clear from the mentioned table that the income from international tourism is growing, however, at a slow pace, which is connected with a number of measures and regulations to be implemented. We will discuss the existing challenges and measures to be implemented in more detail below.

Table 2. International tourism, expenditures (current US\$), million

| | 2000 | 2005 | 2010 | 2015 | 2020 |
|-------------------|---------|---------|-----------|-----------|-----------|
| World | 551.270 | 772.310 | 1.030.000 | 1.180.000 | 1.440.000 |
| Kazakhstan | 483 | 940 | 1.490 | 3.050 | 861 |
| Uzbekistan | - | - | - | 1.900 | 1.060 |
| Tajikistan | - | - | 35 | 24 | 10 |
| Kyrgyzstan | 28 | 94 | 275 | 535 | 185 |

Source: World Bank data, 2023. [17]

Kazakhstan had 6.5 million tourists in 2016. According to the World Economic Forum's Travel and Tourism Competitiveness Report 2017, Kazakhstan's tourism industry generated \$3.08 million in GDP, accounting for 1.6% of total GDP. Kazakhstan rated 81st among the world's countries in the forum's report, outperforming the previous year's score by four measures [18]. According to the World Tourism and Travel Council (WTTC), Kazakhstan would be ranked 129th in

2021, with a tourism proportion of GDP of 6.2% and a monetary volume of \$7.9 billion [19].

The Kazakhstan Tourism Association was founded in May 1999, with the agreement and assistance of the country's president, Nursultan Nazarbayev. The Association is a non-profit, non-governmental organization that comprises the Kazakhstan Association of Hotels and Restaurants, insurance firms, and airlines. The association's mission is to support the growth of tourism in Kazakhstan.

Kazakhstan welcomed 1.47 million international tourists in 2000. By 2012, this figure had risen to 4.81 million, putting Kazakhstan in 51st place among the world's countries. According to the British publication *The Guardian*, Kazakhstan's tourist business is "relatively underdeveloped" despite its high peaks, lakes, and desert landscapes [20]. "Underdeveloped infrastructure" and a "low level of service" are cited as problems impeding the country's tourism growth [21]. Among the issues highlighted is the difficulty of migrating around the nation. Vacations abroad are twice as affordable for locals as they are at home.

Kazakhstan's government launched the Tourism Industry Development Plan 2020, with the goal of developing five tourist destinations in the country: Astana, Almaty, East Kazakhstan, South Kazakhstan, and West Kazakhstan. Kazakhstan is divided into districts. The proposal called for a four-billion-dollar investment and the development of 300,000 new tourist employment by 2020 [22].

The 2006 comedy film *Borat*, which presented Kazakhstan as a primitive, racist, and anti-Semitic country, greatly increased the number of tourists to Kazakhstan. Kazakhstan's government banned the film to defend the nation's honor. The Kazakh government had the opposite response this time when a new installment of "Borat" named "Borat's Next Movie" was published in 2020. The National Tourism Agency of Kazakhstan adopted the movie's iconic line "Kazakhstan! It's great!" as their slogan and spoke it in several commercial films [23].

The increase in international visitors to Kazakhstan was facilitated by the government's visa liberalization policy. Kazakhstan offers visa-free travel to the following countries: Armenia, Belarus, Georgia, Moldova, Kyrgyzstan, Mongolia, Russia, and Ukraine for 90 days, and a 30-day visa to Argentina, Azerbaijan, Serbia, South Korea, Tajikistan, Turkey, and Uzbekistan. The liberalization policy boosted international arrivals.

Kazakhstan started issuing visas in electronic form in September 2020. Kazakhstan has also expanded the list of countries whose residents are eligible for a single-entry visa for business, tourist, or medical reasons. There are 109 nations in the list.

Despite the fact that Kazakhstan has taken a number of successful steps in the development of tourism in various directions, there are problems in the tourism industry, both at the macro and micro levels [24]. Such as, the quality of tourist services, the improvement of information services, the attraction of low-cost airlines, the development of human resources in low-cost accommodation, and other issues.

Based on the results of the research, based on the SWOT analysis of the business entities involved in the tourism industry in Kazakhstan, the following were identified:

- ❖ **S - Strengths** – geographical location of family hotels, traditions and culture focused on receiving guests, diverse cuisine, traditional dishes prepared with environmentally friendly products.
- ❖ **W - Weaknesses** - it is worth noting the lack of experience in the field of services, low professionalism of the staff, which is mainly due to the lack of relevant professional skills, lack of experience in market economic relations and underdeveloped infrastructure.
- ❖ **O - Opportunity** - from them, it is promising that the state of Kazakhstan is well aware of the role of tourism in the economic development of the country, as well as the ongoing infrastructure projects will create additional opportunities for the development of the industry. The professional and educational institutions operating in the country, which massively train personnel for this sector, provide a prerequisite for the training of qualified personnel who will have the opportunity to be employed in the field of tourism.
- ❖ **T - Threats** - high professionalism of competitors and extensive business building experience, political instability, high age of employees in the periphery, which leads to lack of awareness of the need for new knowledge, should be distinguished from them.

To increase the contribution of the private sector to the country's gross domestic product and employment, it is necessary to promote entrepreneurial activity, improve legal regulations, develop and implement effective policies. In this regard, the approaches established by the Organisation for Economic Co-operation and Development (OECD) are interesting, where, along with the simplification of legal regulations, attention is focused on such issues as the business environment, improvement of the education system, access to finance and investment attraction.

Thus, based on the geographical location and climatic conditions of Kazakhstan, it can be said that the country has great opportunities in terms of attracting investments. The tourism industry should be especially noted, the development of which can have a positive impact on other sectors of the economy in the country [25, 26].

Based on the resource potential of Kazakhstan (resorts, cultural heritage, natural resources), it can occupy the niche of a tourist destination of regional importance [27]. For this, the harmonized work of the state and private sectors is necessary, which in the future will allow us to develop both the infrastructure and attract investments in other directions of the tourism industry as well.

Kazakhstan has had tremendous economic development throughout the 2000s, thanks to the first wave of market-oriented reforms, massive mineral resource exploitation, and considerable FDI [28]. Sustained economic growth has elevated the country to the upper middle class, boosting living standards and eliminating poverty. This improvement, however, obscures the country's development model's weaknesses and unevenness. Slowing economic development, rising inequality and elite capture, and weak institutions highlight the shortcomings of Kazakhstan's resource-based and state-led growth model, raising the risk of the country falling into the "middle-income trap."

To make our analysis even more complete, in Table 3 we present key statistical data for Kazakhstan - population, GDP, GDP per capita and life expectancy - as of 2022.

Table 3. Brief data about Kazakhstan, 2022

| Kazakhstan | 2022 |
|---------------------------------|-------------|
| Population, million | 19.2 |
| GDP, current USD, billion | 220.5 |
| GDP per capita, current USD | 11 495 |
| Life Expectancy at birth, years | 71.4 |

Source: Bureau of National Statistics Agency for Strategic Planning and Reforms of the Republic of Kazakhstan, 2023 [29]

Kazakhstan must boost competitiveness and human capital, as well as enhance the performance of the public sector and SOEs [30]. In addition, the nation should implement carbon and energy price reforms, increase social protection, and invest in climate adaptation. Because Kazakhstan's economy is primarily reliant on oil-related earnings, and given the worldwide move toward decarbonization, the government should prioritize economic diversification [31, 32]. To secure a sustainable and resilient economic future, the transition to renewable energy must be hastened. Investing in renewables, enacting carbon taxes, and reforming energy tariffs are critical to achieving this.

It should be noted that the so-called "Silk Road", is one of the oldest routes in the history of mankind, within which thousands of kilometers of historical, cultural and natural attractions are gathered, which allows tourists to get unforgettable impressions by visiting various tourist destinations.

In modern conditions, there is a demand for such types of tourist products on the tourist markets, which allow traveling not only to one country but also to several countries at the same time. The mentioned route is an additional opportunity for Kazakhstan in terms of a better presentation of tourism potential, economic development, trade relations, investment attraction and cultural dialogue.

The involvement of the interested groups will allow the representatives of a particular country to present proposals and plans adapted to the local socio-cultural environment, which is an effective way to achieve the goals. The action plan focuses on the following main issues: marketing, variety of products and development of tourist routes.

It should be noted that UNESCO experts and government representatives have been studying and analyzing the situation on the routes for years. Within the framework of the research, the greatest potential for the development of the tourism industry was identified, which can have a positive impact on local economic development. However, problems related to damage to natural and cultural monuments have also appeared, which should be given due attention.

In general, close economic relations between countries affect the dynamics of economic development of bordering states, and good neighborly relations are also a competitive advantage in changing and unstable environmental conditions. The main part of tourist flows in Kazakhstan comes from neighboring countries. Therefore, close economic relations with these countries are necessary for the growth of tourism activities.

4 Conclusions

Tourism is a complex type of economic activity because it includes different sectors of society and economy. Therefore, it is difficult to accurately assess the impact of the sector on the economy, although it should be noted that there is a methodology for determining the main indicators developed by authoritative organizations, which allows us to obtain reliable data on economic indicators.

Based on the above, it can be said that the travel and tourism industry has quite extensive economic effects in the global economy. It has a significant impact on the structure of the world economy and macroeconomic indicators. It should be noted that during the last years the industry is distinguished by a steady growth rate. Despite economic shocks and fluctuations, the tourism industry continues to create new jobs and attract investments. Capital investments in infrastructure, which in short-term and long-term dynamics have a positive impact on the economic development of the tourist destination, region, country, should be especially noted.

The research also revealed a positive correlation between tourism development and foreign economic relations. Which is manifested in the development of business tourism and its impact on the trade relations of the country. Also, based on statistical data and studies, the positive role of the tourism industry in terms of socio-economic development was highlighted. The relevance of this issue is increasing in developing countries, which have rich natural resources and cultural heritage. Accordingly, for the development of the industry, on the one hand, the issue of tourism policy planning, and on the other hand, the issue of limiting the negative effects of tourism has become relevant.

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