

## ANALYSIS OF THE ECONOMIC STATE OF THE TOURIST INDUSTRY IN THE PAVLODAR REGION (KAZAKHSTAN)

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**Abstract:** The Pavlodar region is of interest as an object of economic diversification and development of the tourism industry of the Republic of Kazakhstan. The purpose of this study is to assess the development of tourism in the Pavlodar region. Statistical data on the contribution of tourism activities to the gross regional product (GRP), infrastructure, the labor market of tourism services, and investments in the sector are analyzed. Data obtained from official sources: Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan for the period 2015-2019. During the study, it was found that the nominal contribution of the tourism industry to the development of the region's economy for 2015–2019 ranged from 0.55% to 0.3%. The maximum volumes of services related to tourism activities and the maximum growth rates were in 2017 and 2019. The growth rates of services in these periods were 114.1% and 107%, respectively. In 2019, tourism reached its maximum development in the Pavlodar region until the start of the pandemic, primarily due to investments in the industry. As of 2019, the degree of depreciation of fixed assets in the tourism industry was 46.2%. Thus, studies show that the tourism industry has a low organizational and economic level of development. However, there is also potential for tourism development: the stable political situation in the Republic of Kazakhstan and Pavlodar region; the implementation of measures to support the development of the tourism industry at the state and regional levels; availability of tourist recreational resources.

**Key words:** tourism industry, the Pavlodar region, diversification of the economy, infrastructure, investments

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### INTRODUCTION

The Republic of Kazakhstan is located in Central Asia. This region has acquired an important strategic geopolitical significance, it is located in the center of the Eurasian continent and represents the political and economic interests of various states of the world (Khetagurova, 2017). At present, the Shanghai Cooperation Organization (SCO) is of great importance in the region. The main goal of the organization is to maintain peace, and cooperation in various areas of the economy, politics, culture, education, and tourism development (Danilovich, 2012). One such way to develop tourism in the region and economic development is China's "One Belt, One Road" Initiative. The essence of the project is to create a trade corridor for the direct supply of goods from East to West on preferential terms, to increase investment in the country in export-oriented production (Anderson et al., 2018). Thus, the states on whose territory the Great Silk Road passed: Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan, and China, are currently strengthening their cooperation again, including in the field of tourism. An initiative program that promotes the economic benefits of local communities, intercultural exchange, and tourism development - "Tourism development strategy using the corridor approach to the heritage of the Silk Road" joint project of UNWTO (United Nations World Tourism Organization) and UNESCO (United Nations Educational, Scientific and Cultural Organization) (Samarkand Declaration 1994) (General Assembly. Twentieth Session Victoria Falls, 2013).

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Kazakhstan is located at the crossroads of geographical and economic importance; it is the largest country in Central Asia. On the territory of Semirechie and South Kazakhstan, part of the Great Silk Road passes - an ancient transit network and a center of trade and civilization connecting Europe and Asia. Thus, the south of the country, historically rich in recreational resources and monuments, is quite developed in terms of tourism (Mamirkulova et al., 2020; Artemyev and Abdreyeva, 2019; Assylbekova et al., 2022). In addition, with its unique natural resources, Kazakhstan also has a huge tourism potential. The city of Astana, as the capital of the republic, has the potential to develop tourism by organizing meetings, incentives, conferences, and exhibitions (Kenzhebekov et al., 2021; Berdenov et al., 2021).

According to the World Economic Forum, in 2019 Kazakhstan ranked 80th out of 140 countries in the World Tourism Competitiveness Index, an improvement of 1 position compared to 2017 (Vechkinzova and Daribekova, 2021). However, the contribution of tourism to the country's gross domestic product (GDP) remains low: in general, the share of tourism in the GDP structure of Kazakhstan according to the methodology of the World Tourism and Travel Council (WTTC) in 2020 amounted to 1.6%, having decreased by almost two times compared to 2019 (2019 - 3.8%), then in 2021 there is a slight increase - 2.0% (Oxford Economics, national sources and UNWTO, 2022). Thus, the country is dependent mainly on the export of commodities (oil and natural gas). However, the possible fall in world prices for fossil fuels, and the transition to environmentally friendly energy sources, create problems for the country's economy. Then, the Government of Kazakhstan began to seek to diversify the economy (Anderson et al., 2018). Recently, the republic has begun to pay attention to the development of the tourism industry (Baiburiev et al., 2018). Kazakhstan is a full member of the World Tourist Organizations (UNWTO) since 1993 and has a lot to offer travelers, from tours designed to highlight the natural beauty of mountains, from lakes and deserts to more unusual itineraries, including space tourism at the Baikonur Cosmodrome and a visit to a Soviet-era GULAG camp (Main Directorate of Corrective Labor Camps). Attractiveness and the prospect of support at all levels have acquired environmental tourism (Baiburiev et al., 2018; Yessimova et al., 2018; Aktymbayeva et al., 2020).

Kazakhstan has natural and recreational resources, and objects of world cultural significance, but is not able to compete with developed tourist destinations in the world. For the further development of this industry, tourism infrastructure, simplification of visa formalities, as well as the creation and promotion of a national tourism brand are needed (Mussina, 2018; Abubakirova et al., 2016; Aktymbayeva et al., 2020; Suleimenov et al., 2022). Consequently, the country needs to develop new tourist destinations of interest to potential tourists. One of these areas is the Pavlodar region of the republic, which is located in the northeast of the state, and borders on the Russian Federation, the Akmola region (proximity to the capital Astana), and other regions of the country. The Pavlodar region is of interest as an object of economic diversification and development of a new industry, the direction chosen by the country's government, since Pavlodar region is a large industrial region with the country's richest mineral resources, has a strategic and advantageous location of regions, connects with other states and regions of Kazakhstan along the South Siberian and Central Siberian railways, automobile, aviation, pipeline and river modes of transport (Isiksal et al., 2018). The main part of the gross regional product (GRP) of the region falls on the industrial sector. The dominance of industrial production in the GRP structure also determines the resource and raw materials orientation of the region (Isiksal et al., 2018; Azhayevev et al., 2020; Ghemis et al., 2018).

However, the Pavlodar region rightfully has a serious potential for the development of all-season domestic and inbound tourism. This is a huge territory of contrasts, where almost next to large cities there are large spaces of nature untouched by civilization. The uniqueness of the region is because almost all types of tourism can be fully developed here. For example, ecological tourism, balneological, cultural and historical, extreme sports, adventure, family, etc.

Currently, more than a thousand monuments of history and culture are known on the territory of the Pavlodar region. And there are more than 700 archaeological, about 300 monuments of history, architecture, monumental art, and spiritual culture. In addition, the region can offer industrial tourism as an alternative to the usual tour package.

Using industrial facilities, port facilities, and agro-industrial complexes to meet the needs of modern tourists in knowledge through industrial tourism, various types of effects can be obtained: economic, social, environmental, etc. (Chikurova and Oshkordina, 2019; Prada et al., 2017). Thus, the purpose of this study is an economic analysis of the development of tourism in the Pavlodar region. The following indicators will be used: the contribution of tourism to GRP, infrastructure, the labor market of tourism services, and investments in the sector. The scope of the study includes the analysis of statistical data for 2015-2019. This period before the pandemic was chosen as the most indicative in terms of tourism development without the impact of negative factors. Thus, it is possible to trace the gradual natural development of tourism in the region. The recreation infrastructure deserves special attention, as it is the most important condition for the development of tourism. The concept of infrastructure development has received significant attention from tourism researchers (Kanwal et al., 2020; Seidahmetov et al., 2014). Infrastructure development is a leading prerequisite for the progressive development of tourism, supporting society, the economy, and the environment.

Infrastructure development promotes cultural tourism and international sporting events that attract tourism and increase economic benefits (Wang et al., 2020). In Kazakhstan, tourism infrastructure development initiatives are considered as a tourism management strategy. In addition, developed infrastructure will improve the quality of life of the local population (Kanwal et al., 2020), and improve the management of recreational and environmental resources.

## **MATERIALS AND METHODS**

### **Pavlodar region on the map of Kazakhstan and Central Asia**

The Central Asian region, having unique tourism resources, has a huge potential for the development of this sector of the economy. The study of the current state of tourism in Central Asia is becoming increasingly relevant, where tourism resources have every chance of becoming part of the national wealth of these countries.



Figure 1. Pavlodar region on the map of Kazakhstan and Central Asia  
 (Source: <https://reachbeyond.org/content/news/read/placing-christian-historyhis-storyin-a-central-asian-context>)

Kazakhstan is located in the very center of the Euro-Asian continent (Figure 1). The country ranks 9th in the world in terms of territory and has a land border with a length of 15 thousand km, 8 thousand of which pass along the border with Russia, and 5 thousand km with China. The length of the maritime borders of Kazakhstan is 1.5 thousand km. The total length of the borders is 16.5 thousand km (Khetagurova, 2017). The Pavlodar region has a favorable economic and geographical position. The region is in the northeast of the country on both banks of the Irtysh River. The region borders East Kazakhstan and Karaganda (in the south), Akmola and North Kazakhstan regions (in the west), as well as three regions of the Russian Federation: Omsk (in the north), Novosibirsk regions (in the northeast) and Altai Territory (in the east).

The territory of the region is 124.8 thousand square meters. km. (4.6% of the total area of the republic). The right bank of the Irtysh is occupied by the Baraba lowland and the Kulunda plain. The left bank is occupied by the Irtysh Plain with absolute heights of 100-200 m. The southwestern part is occupied by the small hills of Saryarka and the mountains of Bayanaul, Akbet (1026 m.), Kyzyltau (1055 m.), and Zheltau (959 m.). The Pavlodar region is located in the steppe and semi-desert zones, there are a huge number of lakes in the region - over 1200. About a hundred of them are fresh, the rest are salty. The largest lakes are Silyty-teniz (965 sq. km.), Zhalauly (398 sq. km.), Kyzylkak (180 sq. km.), and Big Azhbulat (110 sq. km.). There are fresh lakes of tectonic origin - Zhasybay, Toraigyr, and Sabandykul.

The region occupies one of the leading places in the mineral resource complex of the Republic of Kazakhstan (Shomanova et al., 2019). The total value of the balance reserves of solid minerals in the Pavlodar Irtysh region is estimated at 460 billion dollars. These are coal, gold, copper, molybdenum, silver, zinc, barite, cobalt, nickel, and other metals, building materials, etc. More than a third of all coal reserves of Kazakhstan are concentrated in the Pavlodar region. Forecast oil resources in the region are estimated at 315 million tons, and gas at 148 billion cubic meters.

The region is also rich in historical heritage. The seven most significant objects of republican, national significance are included in the sacral map of the region: the Konyr-Auliye cave, the Tomb of Zhasybay batyr, the Mausoleum of Mashkhur Zhusup Kopeev, the Akkelin historical and memorial complex: the estate and mausoleum of M. Shormanov - Bayanaul district, the Auliekol archaeological complex, the Isabek mausoleum ishan hazreta - Ekibastuz region, Sultanbet Sultan's estate, which is located within the city of Pavlodar. The Bayanaul resort area is included in the Touristification Map of the TOP-10 priority territories of the Republic with a potential of 450 thousand tourists per year (the current flow is 200 thousand people). Every year, more than 30,000 tourists visit the salt lakes Maraldy and Tuzkala in the Akkuly and Shcherbaktinsky regions (Chub, 2008). The information base of the study included: literary sources, funds, and published materials of republican and regional departments and institutions. Research methods: data collection and analysis. The study used data from official sources: the Department of Statistics of the Pavlodar region, and the Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan (<https://stat.gov.kz/>).

**RESULTS AND DISCUSSION**

The tourism industry and tourism services in the Pavlodar region are at the stage of development, since the main contribution to GRP is industry, despite a significant period for the formation of market relations in the region (Isiksal et al., 2018). The functioning of the tourism industry is accompanied by insignificant economic cycles.

Table 1. Nominal dynamics of assessment of the contribution of the tourism industry to GRP of Pavlodar region (P = 430.1 USD (exchange rate as of 06/03/2023) (Data source: [www.stat.gov.kz](http://www.stat.gov.kz))

Indicator	Year				
	2015	2016	2017	2018	2019
Gross regional product of Pavlodar region, billion dollars	4.0	4.59	5.51	6.38	6.52
Nominal tourism services (full range of services directly and indirectly related to tourism), million dollars	22.31	20.22	23.01	18.36	19.76
A nominal contribution of the tourism industry to GRP, %	0.55	0.44	0.42	0.29	0.30

Its nominal contribution to the development of the region's economy, analyzing the statistical data given in Table 1, Figure 2, for 2015-2019, ranged from 0.55% to 0.3%, respectively, in 2015 \$22.31 million and 2019 - 19.76 million dollars

(2). Compared with more developed cities of Kazakhstan, according to statistics, only in the city of Almaty, the contribution of GRP is 1.5% and varies from year to year around this value.

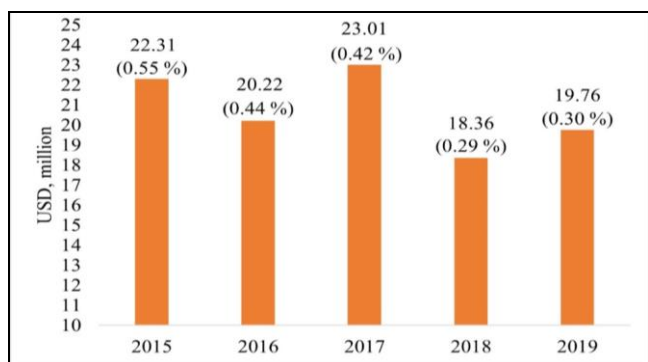


Figure 2. Dynamics of the nominal contribution of the tourism industry to the GRP of the Pavlodar region  
(Data source: Compiled by the authors, based on the materials of the Bureau of National Statistics of the Republic of Kazakhstan)

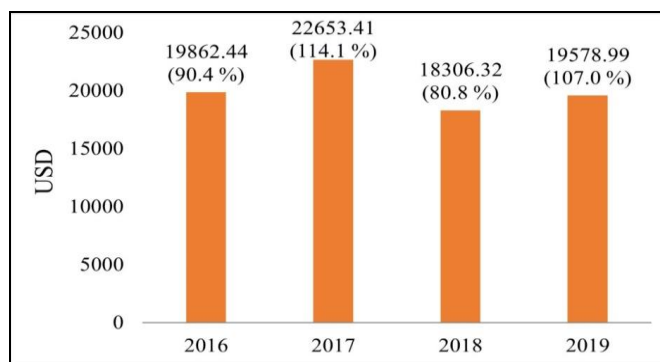


Figure 3. Dynamics of growth rates in the provision of services related to tourism activities

In general, the dynamics of the contribution of the tourist region correlate with the GDP of Kazakhstan. So, since 2015, there has been a gradual decline in the country's GDP and a slight rise by 2019. The largest number of tourist services was offered in 2017. This is indirectly connected with the holding of EXPO-2017 in Kazakhstan - the International Exhibition under the auspices of the International Exhibition Bureau (BIE). EXPO-2017 was attended by 115 states and 22 international organizations. The exhibition was visited by about 4 million people, of which about 0.5 million people came from other countries. Pavlodar region borders on Akmola region, so part of the tourists also visited the Bayanaul National Natural Park and other attractions in the region. Five tourist routes were developed - Bayanaul, pine forest, the mausoleum "Gabdul Wakhit Khazret", excursions around Pavlodar and museums of the city, while active work was carried out to attract Russian tourists to travel to the exhibition through the Pavlodar region.

Since 2018, 1.38 million Russians have visited Kazakhstan, and 1.54 million Kazakhstanis have visited Russia. Some experts associate such large volumes not with classical tourism, but with trips of residents of the border regions. The single economic space of the Customs Union, the existence of the longest land state border between Kazakhstan and Russia, common historical, cultural, and socio-economic development, modern integration processes, and political strategy contribute to the stable development of the tourism sector of the economy (Sansyzybayeva et al., 2021).

Thus, the Pavlodar region has the potential to attract Russian tourists, thanks to a common border, as well as a common history. Researchers estimate that many Russians undertake nostalgic trips, as well as trips to places of memory from the Soviet Union period (Pfoser and Yusupova, 2022). First of all, objects of the natural reserve fund of the region play a key role in the development of tourism. Recreational facilities: Pavlodar region Zhasybay Lake, Sabyndykol, Toraigyry, Birzhankol, stone figures (Kempirtas, Nayzatas, etc.), caves (KonyrAuliye, Auliye, grotto of Dravert), the slopes of Myrzashoky, springs (Auliyebulak, Teleubulak), gorge (Aymanbulak, Stone wonders, Rakhay, Ushsala), Shalday, Beskaragay belt forests, curative mud lake Moydydy, Lake Maraldy, floodplain of the river Yertis.

Specially protected areas: Bayanaul National Park, Kyzyltau nature reserve, state forest nature reserve "Yertis Ormany", Paleontological nature monument "Gusinyy perelet", Natural state reserve "Floodplain of the Irtysh River" (Sansyzybayeva et al., 2021). The Pavlodar region is the industrial center of the Republic, and in recent years, industrialized regions have faced the need to diversify the economy and develop new industries. The advantage of the city of Pavlodar is that there is an opportunity to use the industrial heritage for the development of industrial tourism. Industrial tourism is an effective tool for marketing the territory and a means of diversifying the economy. The potential of industrial regions, due to existing industrial heritage sites, is a solid basis for the development of industrial tourism (Brel et al., 2022).

Unfortunately, being a significant industrial center of Kazakhstan, the Pavlodar region has different problems inherent in industrial cities. It is known that industrial cities have various negative consequences for tourism activity due to the state of the environment. The key environmental problems of the Pavlodar region are air pollution, soil pollution, and environmental problems of the Irtysh River and its floodplain (Azhayev et al., 2020). Thus, when organizing industrial tourism, it is necessary to assess the ecological state of the destination, as well as take all measures for the rational use of resources and recreational load. The functioning of the tourism industry is focused on providing a wide range of services, such as hotel business (accommodation services); recreation, entertainment; sports, etc. Considering directly tourist services, a certain dynamic can be traced. Following Figure 3, the maximum volume of services related to tourism activities and the maximum growth rates were in 2017 and 2019. The growth rates of services in these periods amounted to 114.1% and 107%, respectively. The increase in the growth rate of services, as mentioned above, in 2017 is timed to coincide with the holding of EXPO-2017, and the indicators for 2019 are a gradual increase in the pace, due to the positioning of Kazakhstan as a good tourist destination, and due to the increase in air traffic: in 2019 - from 26 foreign countries on 99 international routes. At the same time, there was an annual increase in the number of international flights.

In 2019, tourism reached its maximum development in the Pavlodar region until the start of the pandemic, primarily due to investments in the industry. According to the forecasts of the Kazakh Tourism National Company, tourism will return to the indicators of 2019 only in 2-4 years (Erkinbayev, 2021). All services related to tourism activities, in the

context of enlarged types, are concentrated in two areas: accommodation services (hotel services) and other recreation services. A study of the dynamics of aggregated types of services related to tourism activities shows that there is a positive trend in accommodation services, while at the same time a negative trend in recreation services.

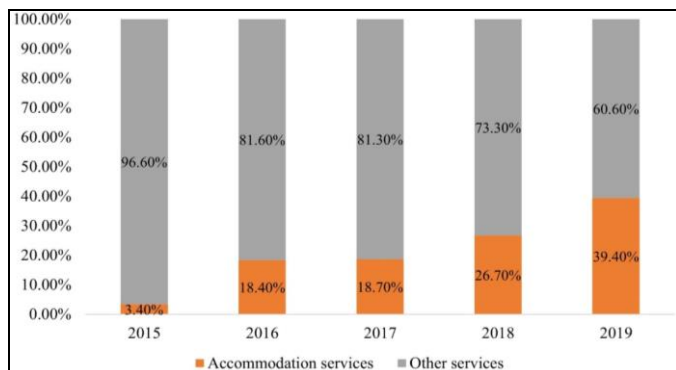


Figure 4. Dynamics of the structure of services related to tourism, in the context of their aggregated types (Data source: Compiled by the authors, based on the materials of the Bureau of National Statistics of the Republic of Kazakhstan)

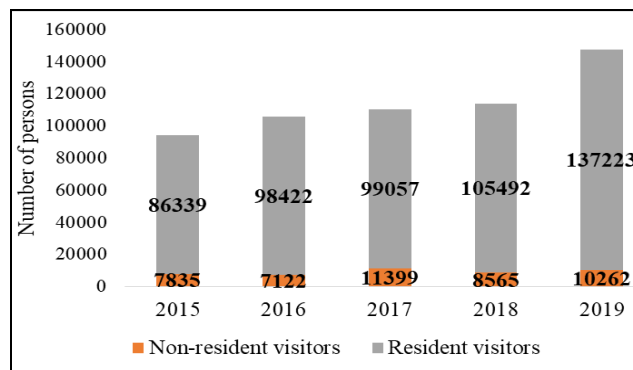


Figure 5. The number of visitors served at accommodation locations (Data source: Compiled by the authors, based on the materials of the Bureau of National Statistics of the Republic of Kazakhstan)

However, from 2015 to 2019, in the structure of services related to tourism activities, by Figure 4, leisure services prevailed. The following are the initial infrastructural organizational and economic foundations for the functioning of the tourism industry:

- organizations providing a range of services related to tourism activities;
- production facilities of the hotel business;
- availability of fixed capital (fixed assets).

The dynamics of organizations providing services related to tourism activities are cyclical. According to research (Titkov et al., 2021), the total number of organizations providing services related to tourism activities from 2015 to 2019 decreased from 193 units to 137 units. The main volume of services rendered falls on small enterprises.

Accommodation companies play an important role, the number of beds in the hotel industry is the most important indicator used to assess the potential of a tourist center or area to receive tourists. According to the results of January-December 2019, the number of accommodation places in the Pavlodar region engaged in accommodating visitors amounted to 112 units, in which there are 3058 rooms, while the one-time capacity is 8374 beds. They served 163,450 people and rendered services in the amount of 3,367.5 million tenge. There are 112 accommodation facilities in the Pavlodar region. Of these, two hotels "Irtys" and "Dvin" have 4 stars, 4 hotels "Saryarka", "Pavlodar", "Sever" and "Altyn Adam" have 3 stars, the remaining 79 hotels without categories, and 43 other accommodation facilities. Of these, 15 hotels with a restaurant, 48 hotels without a restaurant, 26 holiday homes and one-story bungalows, rural houses (chalets), cottages, small houses, and apartments - 23. The total number of rooms is 3058. Of these: apartments - 5 units; luxury - 378 units; standard rooms - 1,907 units; without amenities - 644 units. For the period of 2019, 163,450 visitors were served in accommodation facilities, and the volume of services rendered amounted to 3,367,502.4 thousand tenge.

Below is a table with data on the number of accommodation places and the number of rooms in accommodation places in the Pavlodar region and the dynamics of changes for 2015-2019. According to official statistics, the number of placements in the Pavlodar region amounted to 97 units, which, compared to 2016, declined and decreased by 4 units.

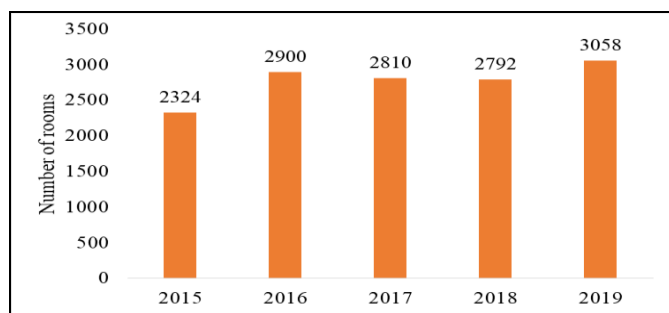


Figure 6. Dynamics of production capacities of tourism activities in Pavlodar region (number of accommodation rooms) (Data source: Compiled by the authors, based on the materials of the Bureau of National Statistics of the Republic of Kazakhstan)

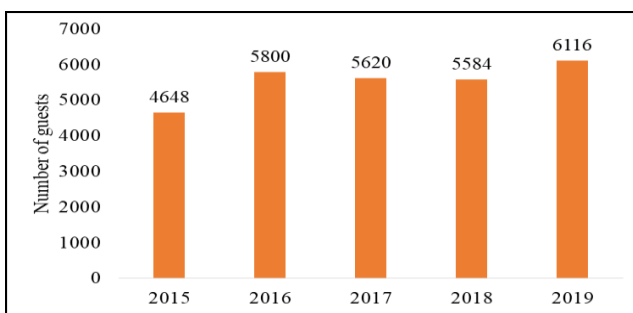


Figure 7. Dynamics of production capacities of tourism activities for one-time accommodation of guests (number of people) (Data source: Compiled by the authors, based on the materials of the Bureau of National Statistics of the Republic of Kazakhstan)

According to the Committee of Statistics of the Republic of Kazakhstan, the number of visitors to accommodation places in 2015-2019 is steadily growing. In the above graph (Figure 5), you can see the growth of residents, which amounted to 6.5% in 2019, which increased by 18% compared to 2015. The availability of accommodations around the world plays a key role in choosing a travel destination. Their sufficiency and level of service significantly affect the volume of tourist flow both within the country and from outside. The following should be considered as the leading production facilities in the tourism sector of the Pavlodar region: the number of accommodation rooms in hotel complexes and the

potential number of guests for one-time accommodation. The dynamics of the number of accommodation rooms and the number of guests for one-time accommodation are shown in Figures 6 and 7.

The maximum production capacity of tourist activities for one-time accommodation of guests falls on the city of Pavlodar (3058 rooms) and Bayanaul district (1482 rooms). Since many travel agencies work with holiday homes in the Bayanaul zone, there has been an increase in accommodation services.

The main tourist attraction of the Pavlodar region is the Bayanaul resort area. Bayanaul is considered the highlight of the Pavlodar region and is the best choice for those who choose tourist trips that take a couple of days. The recreational opportunities of the Bayanaul region are determined by a peculiar combination of natural resources, a wide range of functionality, good transport accessibility of tourism, and recreation facilities for residents of nearby cities and regions. The landscapes of Bayanaul are distinguished by their originality, beauty, and favorable conditions for tourism and recreation, especially in summer. The area is known for ethnographic and historical objects: ancient graves and cemeteries, and traces of ancient settlements. To assess the state of accommodation places and find out the reasons for the low level of tourism, consider the degree of depreciation of fixed assets. In the Pavlodar region, there are growing trends in the depreciation of fixed assets. As of 2019, the degree of depreciation of fixed assets in the tourism industry was 46.2%.

The level of efficiency of fixed assets in the tourism industry can be characterized by the return on assets. The dynamics of capital productivity are shown in Figure 8. The dynamics of capital productivity show that from 2015 to 2019 this indicative indicator is below “1”, as a result, this situation does not correspond to a progressive level (Figure 9).

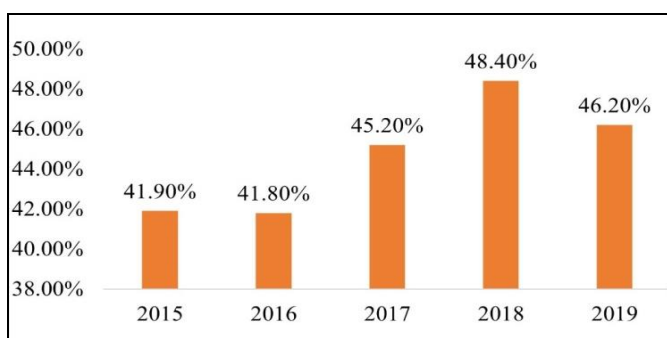


Figure 8. Dynamics of the degree of depreciation of fixed assets in the tourism industry

(Data source: Compiled by the authors, based on the materials of the Bureau of National Statistics of the Republic of Kazakhstan)

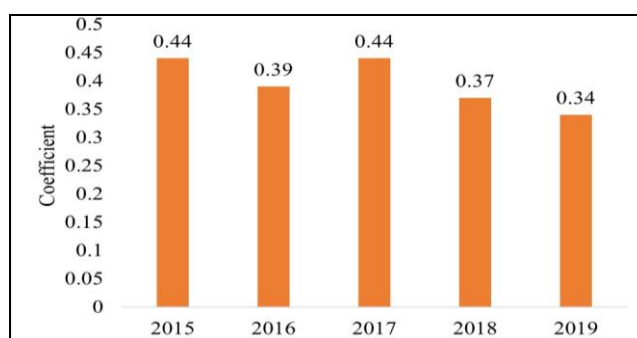


Figure 9. Dynamics of return on assets in the tourism industry

In the complex, the studies show that the tourism industry has a low organizational and economic level of development. Due to the depreciation of the fund, there is also a decline in the entry of tourists to the Pavlodar region. In general, at the present stage, the contribution of the tourism industry to the development of the region, both from a nominal and from a real point of view, remains at a very low level. One of the resulting foundations of the economic results of the functioning of the tourism industry in the Pavlodar region are:

- employment of the population in the field of tourism;
- the average salary of workers in the tourism sector;
- labor productivity in the tourism sector.

Employment in the tourism sector is cyclical. The dynamics of employment in the tourism sector is shown in Figure 10.

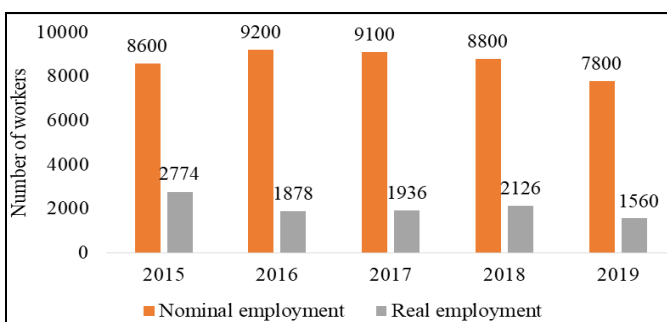


Figure 10. Dynamics of employment in the tourism industry

(Data source: Compiled by the authors, based on the materials of the Bureau of National Statistics of the Republic of Kazakhstan)

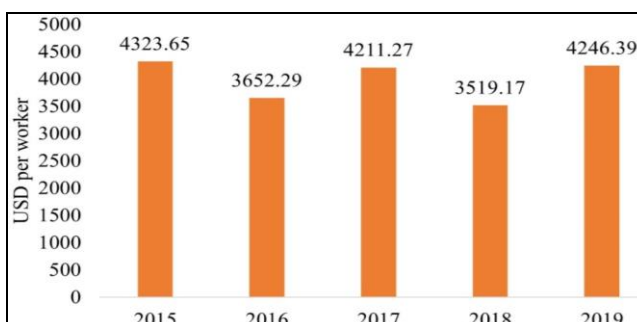


Figure 11. Dynamics of labor productivity in the field of services related to tourism activities

The maximum peak of employment in the tourism sector was in 2016–2017. During these periods, 9200 and 9100 people were employed in the tourism sector, respectively. Comparing the dynamics of employment and the nominal volumes of production of services associated with tourism activities, it is possible to determine labor productivity, the dynamics of which are shown in Figure 11. With a certain degree of probability, there is an intensification of labor processes. Nevertheless, the performance value remains at a very low level. In addition to the general economic trends in the functioning of the tourism industry, we conducted research and analysis of the general organizational and economic foundations for the functioning of the tourism industry in the Pavlodar region.

The investment climate of the tourism industry is cyclically moderate, while the main investments within the strategic period were focused on the development and increase in fixed capital (fixed assets) of tourism organizations. Within the strategic period from 2015 to 2019, investments took place in 2016, 2018, and 2019. The bulk of the investment came in 2019. The dynamics of investments in fixed assets of tourism organizations, in the tourism industry, are presented in Figure 12.

Research and economic calculations show that the main investment in fixed capital of the tourism industry was in 2019 and amounted to 3.3 billion tenge. Priority investment areas on a technological basis are reconstruction, modernization, technical re-equipment of fixed assets, and expansion of production capacities of tourist organizations.

## CONCLUSION

The study and analysis of the general economic trends in the functioning of the tourism industry in the Pavlodar region show that tourism activities and the industry as a whole are at the initial stage of formation and development, despite a rather long period of evolution of the market relations in the Republic of Kazakhstan. The tourism industry functions cyclically, which indicates systemic problems of its development, and intensification. The analysis of the tourism industry of the region allows us to conclude that the tourism industry enterprises are not ready to work in the new market conditions. At the moment, many unresolved problems hinder the development of the tourism industry in the Pavlodar region. First of all, this is weak management, both in the tourism sector itself and in related industries, and the depreciation of existing tourism facilities.

However, there is also potential for tourism development:

- stable political situation in the Republic of Kazakhstan and Pavlodar region;
- implementation of measures to support the development of the tourism industry at the state and regional levels;
- availability of tourist recreational resources (natural resources, unique cultural and historical resources, medical and health-improving resources).

In the complex, the studies show that the tourism industry has a low organizational and economic level of development. The production capacities of tourism activities are concentrated only in the cities of the Pavlodar region, as well as in the Bayanaul district, in visitor centers. In the Pavlodar region, there are growing trends in the depreciation of the material base of accommodation facilities, undeveloped infrastructure for the development of inbound tourism, and a low rate of return on assets; low level of service in recreation areas; high cost and low availability of external capital for domestic tourists.

Also, there is a decrease in employment in the tourism industry, low wages, and labor productivity. In the Pavlodar region, small and medium-sized travel companies provide a relatively higher rate of growth in the number of employees. However, one should also point out the ambiguous impact of the development of travel companies on employment processes, since, on the one hand, travel companies, expanding, attracting more and more labor, but at the same time, fierce competition both within the tourism system and between travel companies and large business leads to the ruin of some small enterprises and the loss of jobs. Thus, it is necessary to create such conditions for the functioning of the tourism system under which the growth of employment would be sustainable, for example, by promoting the development of the large tourist organizations in the Pavlodar region.

A comprehensive qualitative and economic analysis of the tourism industry in the Pavlodar region showed that the region has strengths and opportunities for the development of tourism activities with its focus on comprehensive assistance in intensifying economic growth at the mesolevel.

As a vision for the tourism industry, the following aspects should be considered:

- the possibility of creating a regional tourism product: ecological, industrial tourism;
- creation of new jobs, assistance to the development of small and medium-sized businesses;
- opportunities for the development of the infrastructure of the tourism industry;
- a wide range of implementation of entrepreneurial, business projects in the tourism industry;
- Increasing the production capacity of the tourism industry.

There are several basic economic and social prerequisites for considering tourism as one of the national priorities for economic development in the Pavlodar region:

1) increase in incomes of the population, revenues to the state budget, improvement of social well-being, the possibility of creating new jobs, including employing the population of rural and remote areas, young people without interrupting the traditional way of life;

2) promoting the development of a culture of entrepreneurial activity among the general population by creating opportunities for families, and small and medium-sized businesses, including through the implementation of anchor tourism projects in the most promising areas of the Pavlodar region;

3) contribution to the development of regions and rural areas, including the development of engineering, transport, and tourism infrastructure in remote areas of the Pavlodar region;

4) promoting cooperation and creating opportunities in other sectors of the economy, including agriculture, transport, trade, engineering, light and food industries, creative industry and non-manufacturing sector;

5) promotion of the creation of positive and productive intercultural relations that contribute to the promotion of

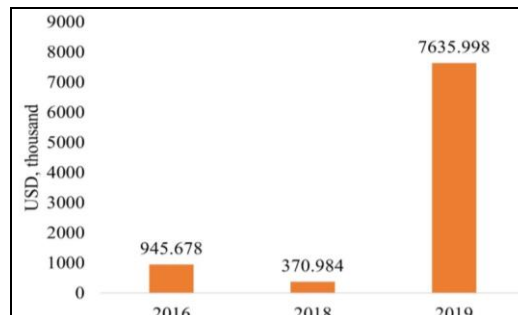


Figure 12. Dynamics of investments in fixed capital of the tourism industry (Data source: Compiled by the authors, based on the materials of the Bureau of National Statistics of the Republic of Kazakhstan)

national and interstate mutual understanding, including the promotion of socio-cultural, ethnographic, medical, sports, cultural, educational, scientific, youth, and other types of tourism, contributing to the promotion of the values of the national idea "Mangilik El";

6) increasing the awareness of the region in the regional, republican, and world markets through active country marketing and brand promotion of the Pavlodar region;

To achieve the national goals of diversifying the economy and improving the welfare and quality of life of the population of the republic, the tourism industry should develop a competitive tourism business, which is based on qualified workers offering attractive tourism products for both domestic and foreign tourists. Development in this direction should contribute to a powerful and stable growth in income from tourism activities for all stakeholders - the state, business, and workers.

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