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## Problems of transition to innovative development of tourism sector in the Republic of Kazakhstan

**Abstract.** *The research aims to identify the features and key problems, as well as the prospects for innovative development of the tourism industry in Kazakhstan. The authors revealed the impact of the global COVID-19 pandemic on the tourism industry, investigated the tourism industry management models, conducted a content analysis of state programs for the development of the tourism industry in Kazakhstan and abroad. The study provides a country-specific comparative review according to the Travel and Tourism Competitiveness Index Report-2019, highlights the factors hampering innovation. The authors also have performed another comparative analysis of the largest tour operators in the world and destination management companies to transfer their experience. Finally, after the obtained research results, the authors proposed recommendations and solutions to the identified problems.*

**Keywords:** *Innovation development, innovation management, management system, innovation-oriented, tourism policy, digitalization, the strategy of tourism development, innovation creation mechanism, innovation activity.*

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**Introduction.** Tourism is a major source of export revenues in economies of the world, it serves as a catalyst for innovation and entrepreneurship. In 2019 the growth in international tourist arrivals worldwide grew 4% and reached 1.5 billion [1]. Unfortunately, by the end of the year, the sector experienced a rapid and sharp drop in demand due to the COVID-19 pandemic. As a result, between January and April in 2020 international tourist arrivals declined by 44% (180 million fewer), it is US\$195 billion loss in international tourism receipts. Compared with 2019 figures the crisis could lead to an annual decline of between 60% and 80% and domestic demand is expected to recover faster than international demand [2]. In this regard, increases the role of innovation management, moreover, the use of standard action schemes becomes extremely risky, thus, both destinations and companies have to adapt to remain competitive.

**The purpose** of this research is to provide a scientific justification of theoretical provisions and practical recommendations that ensure the effective formation and functioning of an innovative management mechanism in the field of tourism.

**Research objective:** to investigate the tourism industry management models; to conduct a content analysis of state programs for tourism industry development in Kazakhstan and foreign countries; to provide a comparative review of the tourism sector competitiveness; to perform a comparative analysis of the largest tour operators, DMC.

**Materials and research methods.** The methodological basis of the study is research articles, statistical data of annual reports, state normative documents, analytical materials. The authors applied the following methods during the research: statistical, comparative analysis, a

generalization of research results, analysis and synthesis, induction and deduction.

**Literature review.** The use of a literature review allowed us to understand the issues associated with a topic of research and to provide direction for this study. So, R. Maklashina (2012), Ali A., Frew A. (2014), F. Sorensen and J. Sundbo (2014), (Hjalager, 2015) noted the changing role of internal and external factors that encourage innovative tourism development [3-6]. A review of the above-mentioned research articles is of great crucial endeavor for our academic research. However, there remains a need for improved measures on innovation in the tourism industry to enhance the sector's potential development [7]. Thus, it is necessary to conduct in-depth and comprehensive studies of the problems and opportunities for the tourism sphere's innovative development in the Republic of Kazakhstan.

**Discussion and results.** In order to improve management efficiency and adapt quickly to new challenges, it is important to use flexible approaches to managing the tourism industry. The study shows that the development of tourism depends on how this industry is perceived at the state level. Currently, experts identify three models for handling the tourism industry abroad [8].

The first model provides for a powerful Ministry that regulates the entire industry. Its implementation requires financial investments in the tourism industry and infrastructure, as well as in the organization of promotion of national tourist products abroad. This management model is typical for Turkey (Ministry of Culture and Tourism), Egypt (Ministry of Tourism and Antiquities), and Thailand (Ministry of Tourism and Sports).

The second model assumes the absence of a central state administration, all issues are resolved on the basis of market self-organization. This model is typical for countries with highly developed market economies like the United States, where travel and tourism are highly decentralized. The national travel and tourism Bureau serves as the Central point of contact for the Federal government.

The third model prevails in European countries. Issues of tourism development are

resolved at the level of a multisectoral ministry. Such ministries usually work in two directions: they solve issues of state regulation, including legal support, international cooperation in the field of tourism and carry out marketing activities, participate in exhibitions, and manage representative offices abroad. This model is typical for France, Spain, Italy, United Kingdom and Kazakhstan (Table 1).

Compared with the above-mentioned countries, Kazakhstan has several shortcomings: firstly, JSC NC "Kazakhtourism" does not have representative offices abroad, while national tourist organizations (NTO) in France, Spain, Great Britain, and Italy have from 20 to 32 of them. Secondly, funding from the state budget to the tourism sector is 20-35 times less on average. It is worth noting an interesting organizational and management system that differs from other countries in Spain [9] (Figure 1). In 2019, Spain ranked 1st place according to the Travel and Tourism Competitiveness Index [10].

Tourism policy in Spain is moving the Spanish tourism model towards the principles of sustainability, innovation and knowledge. The Ministry of industry, trade and tourism with The State Secretariat for Tourism co-ordinates 3 organizations at the national level: Turespana, Paradores de Turismo, SEGITTUR.

1. Turespana is responsible for carrying out the international tourism marketing and promotion, it accounts international network of 33 tourism offices.

2. Paradores de Turismo manages the state-owned hotel network located in historic sites, national parks and protected areas, it accounts 97 establishments and employs more than 4 000 people.

3. SEGITTUR is in charge of the expansion of new technologies in the Spanish Tourism sector. It researches and manages technology, knowledge and innovation to reinforce the competitiveness, quality and sustainability of all aspects of tourism [9].

We assume that Kazakhstan can also apply the experience of Paradores de Turismo by establishing and expanding a network of the state-owned hotels in historic sites, national parks and

Table 1

## Models for handling the tourism industry abroad

Features	Countries				
	France	Spain	Great Britain	Italy	Kazakhstan
Department Name	The French Ministry for Europe and Foreign Affairs (MEAE)	Ministry of industry, trade and tourism	Department for Digital, Culture, Media & Sport		
Ministry of Cultural Heritage and Activities and Tourism	The Ministry of Culture and Sport				
Units in the ministry coordinating tourism activities	interministerial tourism council and a tourism steering council	The State Secretariat for Tourism			
	Visit Britain (ex. BTA)	The Directorate-General for Tourism	The Committee of the Tourism Industry		
Organisations responsible for tourism under state control	Atout France, The National Agency for Holiday Vouchers (broads access to holidays)	Turespaña), Paradores de Turismo, SEGITTUR		ENIT, Italian Alpine Club, Tourism Investment	
Fund	NC «Kazakh Tourism»				
Marketing Policy Organization	Atout France	Turespana	Visit Britain (ex BTA)	ENIT	NC «Kazakh Tourism»
Foreign representations	32	33	20		
	28	-			
State budget financing of tourism sector	€ 5 billion	€336 million	£ 19,5 million	€490 million	KZT
6,5 billion (€13-14 million)					
Note. Compiled by authors based on sources [8]					

protected areas in Kazakh national style which would attract foreign tourists and develop a single standard with a twist of Kazakh hospitality. At the same time, a certain part of the number of rooms can be used for the development of children's and youth tourism, MICE tourism. For the state, the benefit is that it will have assets and

money turnover, and the issue of employment will also be partially resolved.

As we see, the tourism sector is developing in those countries where the government considers it as a branch of the economy and adhere to the innovation-oriented tourism policy and constantly improves the organizational and managerial

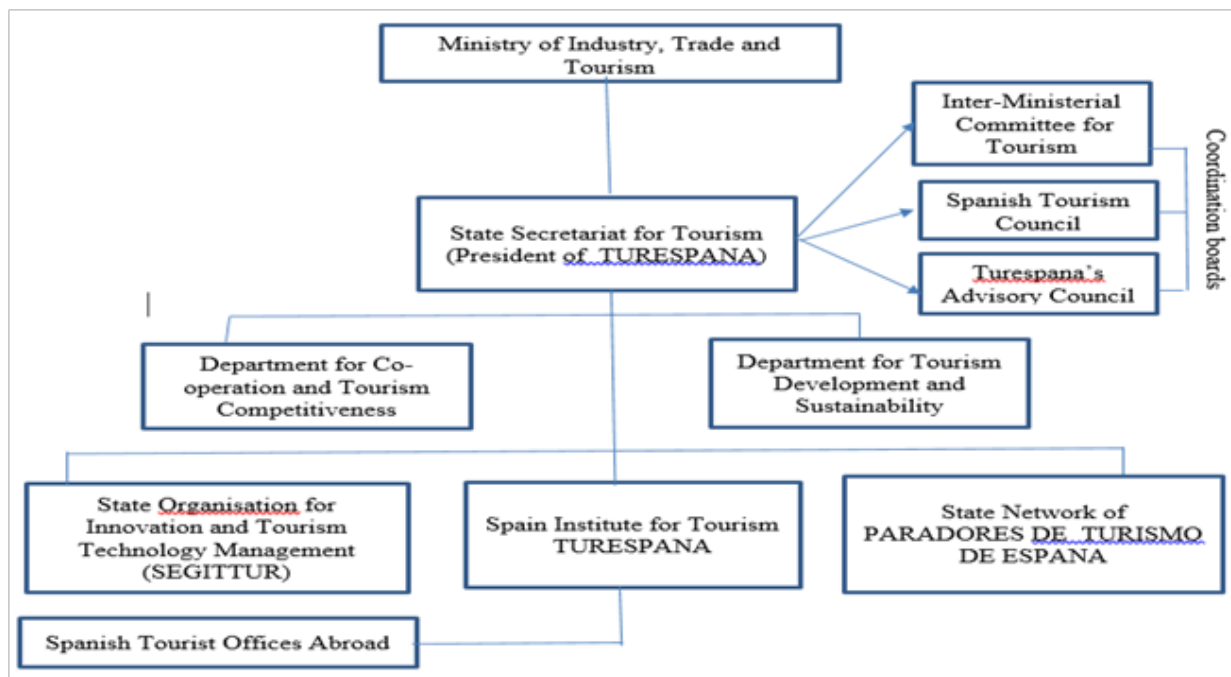


Figure 1. Organisational chart of tourism bodies of Spain

model of tourism management. Therefore, as a logical continuation of the research, we decided to study the experience of countries that put the main emphasis on innovation in the development of tourism. For this purpose, we have reviewed OECD Tourism Trends and Policies 2020 report and concluded that innovations are in touch with digitalization, and in the modern world they cannot exist without each other [9]. Let's look at it in more detail:

In Austria, Next Level Tourism Austria (NETA) offers opportunities for innovation, emphasizes complex technological applications and processes for individual enterprises along with regions triggered by digitalization.

In the United Kingdom Independent Tourism Data Hub assists the Government to comprehend visitors' preferences for location, activities and products in actual time. In addition, it will also be possible to examine tourists who search for the UK as a vacation destination but finally choose another location.

Integrated Digital Tourist Information System established by The Ministry of Tourism of Bulgaria functions as an electronic database that contains information on a wide range of tourism stakeholders. Also it works as an online platform

that enables users to track growth in arrivals at daily and weekly levels. The system is a gateway for communication between national, regional and local stakeholders, serving as a «one-stop shop» with provided information by the participants in the country's National Tourism Register.

Innovation Norway is a state-owned company that functions as the NTO. It's a new funding program that promotes innovation is associated with six key items: innovation and efficient marketing communication in tourism; public-private partnerships supporting innovations in tourism; innovations with acceptance of tradition and seasonality in the region; eco-tourism. In addition, The Nordic Innovation Centre offers a program of innovative funding in Tourism Sector to establish joint innovation projects involving SME's and stakeholders and subsequently applying for funding with accent on New Products and Services.

It is worth noting that digitalization is closely related to startups. In Portugal promoting innovation will be processed through the Tourism Innovation Centre (NEST) which supports companies that develop a creative and innovative approach. Its main areas of activity

are divided into Demo and Living Lab stages. The Demo stage deals with the development of new products and technologies. Living Lab stage carries out experimentation, creation and validation of prototypes, start-up and innovation promotion worldwide, monitoring global digital tourism trends. Kazakhstan is characterized by a low number of startups in the tourism sector due to the lack of investment, weak institutional support and digitalization. Moreover, a start-up in the sector needs more time to scale, develop and return on investment.

Under the Strategic Framework for the Development of the Tourism Sector 2018-22, 8 pillars are identified to improve the experience of tourists in Luxembourg which includes developing quality, accessible and innovative tourism products and services, also promoting transparency. In 2018 the Minister for Tourism launched the Tourism Innovation Award intending to encourage and capitalize on innovation in the tourism sector, namely, to promote the know-how and innovative spirit of tourism businesses and public institutions; to induce creativity and the development of original projects; to open the sector to new trends. The competition was open to small and medium-sized tourism businesses and rewarded stand-out projects exhibiting innovative character and exceptional added value [9].

The above-mentioned Central Innovation hubs for the tourism sector mostly operate separately from national tourism organizations (NTO), usually they focus on innovation and digitalization of the industry, while the promotion of the country is handled by the NTO. As for Kazakhstan, it does not have a Central Innovation hub for the tourism sector. Digitalization in the tourism sector and promotion of the country's brand is carried out by JSC NC «Kazakhtourism». Kazakhstan currently ranks 60th in the TTCI-2019 rating for the use of information and communication technologies, which is also due to the low activity of the business environment for the introduction of new technologies in its work, including the tourism sector (business innovation activity is 7 %) [10]. Firstly, this is confirmed by the fact that the tourist market still does not have

an integrated application or platform which gives the awareness of potential tourists about tourist offers, provides convenience and simplicity of the booking processes and purchasing tourist packages. Secondly, tour operators offer almost identical packages with visits to the most famous attractions. Therefore, it is necessary to expand the range of offers and increase information availability with more creative, innovative solutions, which allows increasing the number of repeat trips and visits. Thus, the support of tourism business participants in technological development and assistance in digitalization of the industry can give a significant boost to the development of the tourism sector.

We conducted a content analysis of state programs for tourism development of Spain, France, Italy, Canada, Switzerland, Thailand, the Russian Federation and Kazakhstan. These programs combine such concepts as innovation, tourism products, digitalization, competitiveness, investment, management, and quality [11-21] (Table 2).

Great emphasis is placed on *innovation* in Tourism 2020 Spanish Tourism Plan Horizon 2020 – 111 times. *Tourism product* is mentioned – 8 times and *product* – 210 times in Tourism 2020: Spanish Tourism Plan Horizon 2020, 78 times in the Strategy for the development of tourism in the Russian Federation for the period up to 2035. *Digitalization* is mentioned 89 times in the Tourism Strategy Of the Swiss Confederation, *Competitiveness* – 77 times in Tourism 2020: Spanish Tourism Plan Horizon 2020. In the State program for the development of the tourism industry of the Republic of Kazakhstan for 2019 – 2025 *Investment* more notably than in other countries – 95 times and 47 times in the Canada program named Creating middle class jobs: A Federal tourism growth Strategy. To the management the most attention is paid in the State program for the development of the tourism industry of the Republic of Kazakhstan for 2019 - 2025 – 60 times, in Tourism 2020 Spanish Tourism Plan Horizon 2020 – 58 times. *Quality* is mostly mentioned in The Second National Tourism Development Plan (2017-2021) Thailand – 151 times [11-21]. In General, the content analysis presented the state



Table 2

## The content analysis of state programs for tourism development

Countries	Innovation	(Tourism) product	Digital	Competitiveness	Investment	Management	Quality
Sustainable tourism strategy of Spain 2030	4	21	20	8	-	-	21
Tourism 2020 : Spanish Tourism Plan Horizon 2020	111	8 / 210	-	77	28	58	-
2022 Tourism Strategy Development Plan (France)	9	-	-	-	6	-	-
Strategic Tourism Plan 2017-2022 (Italy)	13	-	5	15	-	-	12
Creating middle class jobs: A federal tourism growth Strategy (Canada)	5	-	-	-	47	-	-
Tourism Strategy Of the Swiss Confederation (Switzerland)	28	-	89	20	34	-	-
The Second National Tourism Development Plan (2017-2021) Thailand	10	10	16	23	-	-	151
Tourism development strategy in the Russian Federation for the period up to 2020	10	-	-	-	40	23	48
Tourism development strategy in the Russian Federation for the period up to 2035	-	78	18	-	35	-	-
State program for the development of the tourism industry of the Republic of Kazakhstan for 2019 - 2025	5	11	6	-	95	60	-
The concept of development of the tourism industry of the Republic of Kazakhstan until 2023	3	20	-	-	18	-	14
Note. Compiled by authors based on source [11-21]							

of the tourism industry development and in what direction it should be developed. We noticed that Innovation is closely linked to investment and digitalization, and tourism products, they must be competitive and of high quality. And all these processes have to be managed effectively.

For innovative development of tourism industry of Kazakhstan it is necessary to follow the model of the innovation-oriented policy in the field of tourism which includes innovation creation mechanism, investment in attractions, endogenous growth potential, new bundles of services and markets, competitive structure. Innovation creation mechanism (ICM) helps to eliminate the barriers to innovation and to make innovation processes a matter of routine. Creative entrepreneurs, sector specific knowledge, human resources, R&D support are needed to improve existing structures, take advantage of the endogenous growth potential of destinations. Innovations are a way of making sure that the economic structures of destinations will always be dynamic. Existing products and services have to be upgraded. In improving competitive structure it is important to speed up restructuring for the creation of entirely new structures. But without cooperation it is incapable of innovating and offering the customer added value. Structures will become more competitive when company grows in size.

We conducted a country-specific comparative review of the countries that we have studied in this article according to the Travel and Tourism Competitiveness Index Report-2019 by following criteria: T&T Share of GDP, international tourist arrivals, International tourism inbound receipts, average receipts per arrival, T&T industry employment (Table 3).

At the above-mentioned table according to the TTCI rank in 2019, the first places belong to Spain, France, Germany, unfortunately Kazakhstan ranks 80th place. As for the T&T Share of GDP indicator, Thailand, Iceland, Greece have the highest indicators of 8.5-9.6%, while the Russian Federation, Romania and Kazakhstan have the lowest indicators of 1.2-1.8 %. The number of international tourist arrivals leads France (86 917 700) and Spain (81 868 500 million), but

Kazakhstan, possessing enormous territory, lags behind by far (4 559 500 million). International tourism inbound receipts are higher in the United States (210,747. 0 million) and less in Kazakhstan (1,780.5 million) [10].

Average receipts per arrival more in USA, UK, UAE (527-529 usd), less in Austria (402 usd). T&T industry GDP in million usd is higher in the USA (554,872. 9 mln. usd), while in Kazakhstan this amount is 185 times less (2,998.4 mln.usd), and Bulgaria, Iceland, Slovakia, Luxembourg have low indicators from 2,026.9 to 2,872.7 mln. usd. Leader in T&T industry employment is USA with 5,793,400 jobs, Kazakhstan has only 186,200 jobs, this is 31 times less, Slovakia has 68,500 jobs. T&T industry Share of Employment % high in Greece-12.7 % and low in Russia (1.2), Turkey (1.8 %) and Kazakhstan (2.2%) [10].

As we can see, countries that have included innovation in their tourism policies are in a favorable position. Nevertheless, they continue to compete to achieve even better results every year. Therefore, it is very important for Kazakhstan to switch to innovative development. The lack of innovative strategies affects the contribution of tourism to the country's GDP, the impact on the balance of payments, the volume of investment in tourism, the reduction of tourist flows and, as a result, the amount of tax revenue generated by the tourism industry. For example, every dollar spent on Brand USA has already returned to the US economy in a 47-fold amount due to the costs of tourists. Malaysia has managed to increase the number of tourist arrivals to 25 million in a short period of 10 years. Two years later, after the Fukushima tragedy, Japan was able not only to restore, but also to increase the flow of tourists.

Trends in the development of the tourism industry indicate that strategic alliances and global associations operate effectively on a global scale, implementing a single management principle and a common development strategy to achieve the highest results from their activities. They seek to expand their area of activity, establish long-term strategies for company development, improve the organizational structure of management, make investment decisions, use recreational, investment and other resources in

Country-specific comparative review according to the Travel and Tourism Competitiveness Index Report-2019

Countries	TTCI rank	T&T Share of GDP %	International tourist arrivals, million	International tourism inbound receipts, million/usd	Average receipts per arrival, usd	T&T industry GDP, million/usd	T&T industry employment, jobs	T&T industry Share of Employment, %
Spain	1	5.4	81 868 500	68 114.1	513.5	78 464.0	958 100	5.0
France	2	3.9	86 917 700	60 680.7	438.5	109 404.9	1 296 700	4.6
Germany	3	3.5	37 451 500	39 823.4	441.5	138 987.8	3 065 300	6.8
USA	5	2.7	76 941 400	210 747.0	529.5	554 872.9	5 793 400	3.7
UK	6	3.7	37 651 000	49 048.7	528.5	105 283.6	1 697 300	4.8
Italy	8	5.6	58 253 000	44 233.2	456.5	117 336.8	1 543 100	6.6
Canada	9	2.0	20 794 100	20 328.5	418.5	33 995.7	751 800	4.0
Switzerland	10	2.7	11 133 000	16 273 8	517.5	19 079 1	173 000	3.4
Austria	11	7.7	29,460,300	20,460.0	402.5	35,298.8	392,700	8.7
Portugal	12	7.1	21,200,000	17,118.7	499.5	16,905.0	389,200	8.1
Norway	20	3.5	6,252,000	5,399.9	491.5	15,209.0	158,900	5.9
Luxembourg	23	4.1	1,045,900	4,552.1	471.5	2,872.7	15,700	5.9
Greece	25	8.5	27,194,200	16,527.7	443.5	18,309.9	485,500	12.7
Iceland	30	9.0	2,224,100	3,011.3	450.5	2,346.9	15,200	7.6
Thailand	31	9.6	35 482 500	57 477.0	521.5	48 863.1	2 436 300	6.5
UAE	33	5.5	15 790 000	21 048.3	527.5	22 059.4	335 300	5.3
Russia	39	1.2	24 390 000	8 944.6	502.5	19 400.0	839 300	1.2
Turkey	43	4.3	37 603 000	22 478.0	524.5	33 783.9	532 100	1.8
Bulgaria	45	3.1	8,883,000	4,045.0	413.5	2,026.9	93,000	2.9
Romania	56	1.5	2,760,100	2,527.1	501.5	3,687.7	222,500	2.6
The Slovak Republic	60	2.6	7,620,000	2,923.4	510.5	2,750.1	68,500	2.7
Egypt	65	6.2	8 156 000	7 774.9	433.5	15 418.5	1 156 000	4.4
Kazakhstan	80	1.8	4 559 500	1 780.5	460.5	2 998.4	186 200	2.2

Note. Compiled by authors based on sources [10]



Table 4

The comparative analysis of the largest receptive tour operator companies

Criteria	Turkey		Russia	Greece	Germany	UAE		Thailand	Kazakhstan	
	Cattour	Anex Tourism Group	Pegas touristic	Mouzenidis Group	TUI Group	Al Khalidiah Tourism	Royal Park Tourism Services	Sayama Travel Group	Asia Discovery	ACT K azakhstan
Foundation year	1997	1996	1994	1995	1997	1996	1992	- (2008)	2001	2008
Own car park	+	+	+	+	+	+	+	+	+	+
Staff of guides	+	+	+	+	+	+	+	+	+	+
Long Term Hotel Management	-	+	+	+	+	+	+	-	-	-
Own airlines	-	-	-	+	+	-	-	-	-	-
Branchs in hotels	-	-	-	-	-	+	-	-	-	-
Representative offices abroad	-	+	+	+	+	+	+	+	-	-
Affiliated companies	+	+	+	+	+	+	+	+	-	+
Shares on the stock exchange	-	+	-	-	+	-	+	-	-	-
The concept implemented in hotels	-	+	-	-	+	-	-	-	-	
Served tourists	-	-	-	-	27 mln	-	-	-	-	20000
Employees	-	-	-	>3000	70 000	-	-	201-500	-	-
Turnover					€19bln	-	-	-	-	-
Operating result					€893mln	-	-			
Составлено авторами [22-31]										

those places and directions that promise long-term growth prospects and opportunities to benefit from tourism activities.

Let us consider the largest receptive tour operator companies of Turkey, the Russian Federation, Greece, Germany, the United Arab Emirates, Thailand and Kazakhstan which were selected for comparative analysis. The criteria and their results are shown in the table below.

From the short review above, key findings emerge the following:

1. Superior results are seen for foreign tour operators that maintains a transport park, for example, the Greek tour operator Mouzenidis

Group owns 100 buses, while domestic tour operators in Kazakhstan mostly rent buses of transport companies, as a result, the tour cost would be expensive and the quality of provided services may differ from service standards of tour company like the uniform of the drivers, the cleanliness of the cabin, the serviceability of the microphone and etc. [25].

2. There is also important difference in guide services, as a case in point Royal Park Tourism Services in the UAE employs 60 licensed guides, including 15 hotel guides. In Kazakhstan, guides typically work as freelancers and generally, tour companies recruit them according their needs,

there are rarely companies that have staff guides [28].

3. Another promising finding is that tour operators in Turkey, Greece, the United Arab Emirates, Russia, and Germany own their hotels or practice Long Term Hotel Management expanding by that their borders: *Anex Tourism Group* operates Asteria, Selectum, Utopia World Resort 5\*, *Pegas touristic* - Dessole, Swandor (Топкәпi), PGS, *Mouzenidis Group* – Bomo Hotel, *TUI Group*: RIU, TUI Magic Life, Grupotel, Iberotel, Robinson, Sol Y Mar Club, Barut, TT Hotels, Jaz, Atlantica, Blue Diamond, Dorfhotel, Toskana Resort Castelfalfi, Karisma, Nordotel; *Al Khalidiah Tourism* - Villa Al Khalidiah, Marhaba Resort; Royal Beach Resort & Spa, Ewan Sharjah; *Royal Park Tourism Services* - 5 hotels Savoy Suites Hotel Apartments (HA); Savoy Central HA; Savoy Park HA; Savoy Crest HA; Marcopolo Hotel [22-28]. Unfortunately, in Kazakhstan at the moment Long Term Hotel Management have not yet practiced, particularly tour operators conclude an agreement with hotels on blocks of rooms for a specific period or specific events, for example, during the international specialized exhibition EXPO-2017 ITC «Complete Service» LLP allocated a block of rooms at «RIXOS PRESIDENT ASTANA» 5\* hotel and rented block of apartments in a new residential building.

4. In international practice, tour operators possess their own airlines, aircraft fleets, for example, *Mouzenidis Group* owns *Ellinair*, *TUI Group* maintains 6 airlines, 150 airplanes, 18 cruise liners primarily contributing to the development of inbound tourism [25-26]. In Kazakhstan, the situation is different, because tour operators charter boards to Turkey, Thailand, Egypt or take a block of seats of different airlines to the UAE and other countries working for outbound tourism. Recently, tour operators began to take a block of seats on trains and planes in the direction of Alakol, it is a big impetus for the development of domestic tourism.

5. One of the major advantages of overseas tour operators is that they have representative offices abroad and branches in hotels for efficient work, which allows to attract tourists and offer more excursions and other services of companies.

6. Particular attention is paid to the affiliated companies or various departments of tour operators specializing in individual segments: each of them works in its own direction, their tasks are different, but the aim is the same – tourist flow and a big profit. For example, *Cattour* works on mass tourism, while its affiliated company – *Mai Excellent Concierge Service* specializes in individual VIP services like transfer from the airport to the hotel by helicopter; *Mouzenidis Group* operates *Mouzenidis Intour* that works on inbound tourism, *Ellin Camp* (children's camps) and *Elion Club* differs with its children's concepts in hotels, *Wedding Melody* tasks wedding events, *Active MICE* – business events, *Grekodom Development* works on real estate rentals; *Greek Furs* practice exclusively on fur tours. Turkish leading tour operator *Consul Travel Service* divided their provided services into different departments as *Consul Luxury Service*, *Consul Wedding Service*, *Consul MICE service*, *Consul Sport service*. As for Kazakhstan, it is presented as follows: *ACT Kazakhstan* integrates *Almaty City Tour*, *Astana City Tour*, *ACT Adventure*, *ACT MICE*, *ACT Training*, but in most cases, the work of tour operators is not divided into such segments and the same manager works on both mice segment and sport service requests [22-31].

7. In addition, foreign tour operators are actively involved in implementing their Hotel Management concepts: *Angel Kids Club* of *Anex Tourism Group*, *Fun&Sun*, *Day&night* connected, *SMART*, kid's club "Mini Toucan" *TUI SENSIMAR*, *TUI Sensatori*, *TUI Family Life*, *TUI Suneo* of *TUI Group* [23, 26]. In Kazakhstan, there is currently no such feedback between the hotel and tour operators.

8. The more creativity, the more tourists. For example, *TUI group* served 27 million tourists, its turnover \$19 bn, operating result - \$893mln., besides the corporation has shares on the stock exchange named *TUI Group-London* stock exchange, it is included in the *FTSE 100* index [26]. *ACT Kazakhstan* served 20,000, *Kazunion* 400,000 tourists. Unfortunately, other tour operators do not have information in the public domain, due to the fact that it is a trade secret. Tour operators also contribute employment, for example, *Mouzenidis Group* more than 3000

employees, TUI Group-70 000, Sayama Travel Group 201-500 employees [25, 26, 29].

From the outcome of our investigation it is obvious that travel business needs support or encouragement, motivation to turn into a large multinational corporation. For example, tour operators that provide an increase in foreign tourists from 10 «target» countries that have visited Russia can receive subsidies from the Federal budget. The principle of subsidization is financial support for the accommodation of tourists for more than 2 nights in a hotel, not for tourist products. The total amount of the subsidy will be made up of the base amount multiplied by 3 factors, such as the length of stay, the hotel category, and the amount ranked according to the category of regions. The amount of the subsidy per tourist can vary from 1 thousand to 9 thousand 600 rubles (when applying all the maximum values of coefficients) [32].

The key management principles, representing general trends for tourism companies were established to determine the tasks of managing the innovative development of the tourism industry [33].

1. *The Principle of international competitiveness* focuses on the high level of tourism services.

2. *The Principle of new tasks* ensures the solution of qualitatively new tasks that lead to the need to focus on the innovative path of development.

3. *The Principle of a systematic approach and complexity of tasks* is necessary to meet the established goals and criteria.

4. *The Principle of reengineering* is the continuous development of a travel business as a travel network.

5. *The Principle of unity and updating of the information base* is necessary to solve the entire set of tasks of managing a travel company.

6. *The principle of matching the capacity of different parts of the system* is important to avoid overloading of the system links, leading to their inefficient use in the tourist complex.

7. *The principle of rational combination of unification and exclusivity of services.* In this case, management systems should not lead to significant complexity of standard solutions, but at the same time it have to preserve the exclusivity of the provided services.

**Conclusion.** Despite the fact that Kazakhstan is striving to become a tourist destination, tourist products are very poorly developed.

Therefore, it is very important to reconsider management approaches and in this regard, increasing the role of innovation management. Firstly, the innovative problems of tourism are typically followed by investment ones. Secondly, strengthening the innovative orientation of tourism are seen in organizational and managerial changes. Thus, measures to enhance the quality management system of tourist services through innovation require the involvement of all levels of the tourism industry management. Thirdly, planned innovations should be measurable, innovative intentions should be relatively time-oriented by setting deadlines to achieve the desired outcomes; moreover, innovative goals should be achievable even in the case of possible risks, difficulties and uncertainty; development program's goals should be mutually coherent and consistent.

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### **Қазақстан Республикасындағы туризм саласының инновациялық даму бағытына көшу мәселелері**

**Аңдатпа.** Ғылыми мақаланың мақсаты – Қазақстан Республикасының туристік саласының ерекшеліктері мен негізгі мәселелерін, сондай-ақ, инновациялық даму перспективаларын және оған кедергі келтіретін факторларды анықтау болып табылады. Авторлар әлемдік COVID-19 пандемиясының туризм индустриясына әсерін анықтап, туристік саланың басқару модельдерін зерттеді. Зерттеудің негізгі мазмұнын Қазақстандағы және шет елдердегі туризмді дамыту жөніндегі мемлекеттік бағдарламалардың контент-талдауы құрайды. Мақалада Travel and Tourism Competitiveness Index Report-2019 рейтингіне сәйкес жекелеген елдер бойынша салыстырмалы шолу жасалған. Сонымен қатар, ғылыми мақала әлемдегі ең ірі тuroператорлар мен ДМС-дің үздік тәжірибелерін еліміздің туризм саласына енгізу мақсатында орындалған салыстырмалы талдаумен толықтырылған. Осылайша, зерттеу нәтижесінің қорытындысы негізінде авторлар анықталған мәселелерді шешу бойынша бірқатар ұсыныстар жасады.

**Түйін сөздер:** инновациялық даму, инновациялық менеджмент, басқару жүйесі, инновацияға бағытталған туристік саясат, цифрландыру, туризмді дамыту стратегиясы, инновацияны құру механизмі, инновациялық қызмет.

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### **Проблемы перехода к инновационному развитию туристской отрасли в Республике Казахстан**

**Аннотация.** Целью данного исследования является выявление особенностей и ключевых проблем, а также перспектив инновационного развития туристской отрасли Республики Казахстан. Авторами выявлено влияние мировой пандемии COVID-19 на индустрию туризма, изучены модели управления туристской отраслью. Основное содержание исследования составляет контент-анализ государственных программ по развитию туризма в Казахстане и за рубежом. В статье представлен сравнительный об-

зор конкурентоспособности туристской индустрии по отдельным странам согласно рейтингу Travel and Tourism Competitiveness Index Report-2019. Данное исследование дополняется сравнительным анализом крупнейших туроператоров и ДМС в мире с целью перенятия их опыта. Таким образом, после полученных результатов исследований авторами были предложены рекомендации и решения выявленных проблем.

**Ключевые слова:** инновационное развитие, инновационный менеджмент, система управления, инновационно-ориентированная туристская политика, цифровизация, стратегия развития туризма, механизм создания инноваций, инновационная деятельность.

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