International Tourism and the Place of Kazakhstan on World Rating of the Tourism Development

G.M. Ospanov

Karaganda State University named after academician E.A. Buketov, Karaganda, Kazakhstan

Abstract: In this article explores the indicators of international tourist arrivals according to the Barometer of International Tourism of the World Tourism Organization. The ranking of countries in terms of tourism industry was shown. In the ranking of research using data from the International Air Transport Association, the World Tourism Organization and the World Council of Travel and Tourism. In the article there was a cluster analysis by the such parameters as the legal regulation of tourism, business climate and tourism infrastructure, human, cultural and natural resources. Under the laws and regulations affecting of tourism regulatory framework implies, environmental protection, safety and security, sanitation and the value that the authorities give the tourism industry. The "business climate and tourism infrastructure" indicator includes the infrastructure of air, land and water transport, tourism infrastructure, the level of information and communication technologies, price competitiveness. Human, cultural and natural resources are revealed as human resources, friendliness of local people towards tourists, natural resources and cultural resources. Cluster analysis allowed to classify regions of the world based on indicators, expert evaluations, reflecting the attractiveness of a country for tourism development. It gave us a possible to determine the place of Kazakhstan in the global tourism market.

Key words: Tourism · Infrastructure · Resources · Market

INTRODUCTION

International tourism plays an increasingly important role in the global economy. The new millennium was marked not only the rise of international tourist traffic, but also the emergence of new trends in the industry.

However, should be noted, that the changes occurring in the tourism market, the appearance of new trends in the rapidly growing field of international tourism. One of the main features of the development of tourism is the uneven distribution of tourist flows in different regions and countries. Tourist flows are concentrated in a few regions of the world and their movement is mainly intraregional character.

According to the latest data of the Barometer of international tourism of the World Tourism Organization (UNWTO), in 2011 the number of international tourist arrivals grew by over 4% to 981 million. Given the expected 2013 growth continued, though slower, the number of international tourist arrivals in this year will reach one billion. The available data about incomes from international tourism and international tourism expenditure in 2011 is substantially the same as the positive trends in the arrivals area. Among 10 tourist destinations of leading countries is particularly important income increased in the U.S., Spain, Hong Kong and the United Kingdom. Leaders on the costs are growing guides tourists markets-China, Russia, Brazil and India-followed by traditional markets, while the growth rate of expenditure of travelers from Germany and the U.S. were higher than in previous years [1].

MATERIALS AND METHODS

To analyze the differentiation of countries in terms of tourism attraction in them, used the method of grouping with which the entire set of regional actors is divided into several homogeneous groups. Forming groups of regions with different indices peer review conducted using cluster analysis.

«Claster» is a cluster, a group of elements, which are characterized by a general property. The basis of this method is a set of data describing the objects under study for a number of features [2, p. 56-58].

Corresponding Author: G.M. Ospanov, Karaganda State University named after academician E.A. Buketov,
ul. Universitetskaya-28, 100028 Karaganda, Kazakhstan.

Cluster analysis allows to solve the following tasks of economic and statistical research: to form a homogeneous population, select an essential features, identify typical groups.

Cluster analysis algorithm based on the calculation of distance matrix. In this paper, to calculate the distance matrix was used to the usual Euclidean distance. Processing images produced using the application package «Statistica 6.0» and «Microsoft Excel».

Multidimensional classification was carried out using the indicators above groups of factors.

Notable in the study is that for the analysis were selected following countries: China, France, USA, Spain, Hong Kong (China), the United Kingdom, Spain, Mexico, Russia, Czech Republic, Kazakhstan and Ukraine. This choice is motivated by the fact that, in our view, does not make sense for the regional differentiation use 139 countries; therefore, based on a forecast of UNWTO, we selected regions that by the 2020 will be the most visited countries in the world [3].

To perform the analysis has been added Ukraine, as a promising tourist region in terms of tourism development, because in there is the huge concentration of cultural, natural and infrastructure capacity.

Important in the cluster analysis was to determine the location of Kazakhstan among the above regions of the world.

Based on these results the group produced different algorithms of cluster analysis, we have chosen the method of mean between groups, since it is based were obtained the best results partition [4, p. 125-129].

The Main Part: In 2011, experts of the World Economic Forum in Davos, identified as attractive for tourism development of the country. The report of this study is called-"The travel and tourism competitiveness report 2011". Analogue of this report today does not exist, because the experts evaluated the policy of the authorities in the field of tourism, their ability to provide security, sanitation, recreation costs, the development of transport infrastructure, the national color, the presence of famous hotels, the environment, human resources, etc.

In the ranking of research using data from the International Air Transport Association (IATA), the World Tourism Organization (UNWTO) and the World Council of Travel and Tourism (WTTC). In the report was examined 139 countries.

In general, for the analysis was chosen three major parameters which, in turn, is divided into 13 sub-parameters, bearing important in determining the most attractive countries for tourism.

Among these parameters are the following:

- Group 1-"legal regulation of tourism", which became a part of a number of the following: legal framework, environmental protection, security and safety, sanitation and the value that the authorities give the tourism industry.
- Group 2-"the business climate and infrastructure": air transport infrastructure, transport infrastructure (land and water), tourism infrastructure, the level of information and communication technologies, cost competitiveness.
- Group 3-"human, cultural and natural resources", settings such as: human resources, friendliness of local people towards tourists, natural resources and cultural resources.

Most attractive country for the traveler experts recognized Switzerland, which was-5,68 points, respectively, taking the 1st place in the ranking. This European country has received top marks in categories such as: "the security and political stability", "sanitary conditions in the country" and "the degree of development and quality of transport infrastructure". From the point of view of experts, Switzerland has the world's best transport and tourist infrastructure, as well as a pronounced national flavor that attracts citizens of other countries [5].

Second place in the ranking in terms of the attractiveness took Germany-5,5 points. France closed the three leaders.

Next in the ranking of world tourist destinations followed-Austria, Sweden, USA, UK, Spain, Canada and Singapore.

From the former Soviet Union, the greatest potential for development of tourism business has Russia-59 place. It is important that the final assessment of the country had a negative effect that Russia was given the last, 124th place of friendliness by law to foreign investment, the 113th of ecology and the 104th place of environmental friendliness to tourists.

Then following Georgia (73rd place), Azerbaijan (83rd place), Ukraine (85th place), Armenia (90th place) and Kazakhstan-93rd place. Our country has the lowest score received by parameters such as: tourism infrastructure (2,15 points out of 7), the degree of development of information and communication technology and air transport infrastructure-at 2,34 and 2,76 points respectively.

Among the 15 parameters, the highest score to the parameter-"sanitation"-5,3 points. Experts believe that in Kazakhstan, met quite a high level of sanitary conditions [6, c. 8].

From the standpoint of the most uncompetitive tourism began-Nigeria, Benin, Ethiopia, Cameroon, Mozambique, Bangladesh, Lesotho, Angola, Burundi and Chad. According to the above, it is all the countries in the African Region. Particularly low scores (ranging from 1,2 to 2,8 points) were analyzed regions on parameters such as: health and safety, sanitation, transport infrastructure and tourism infrastructure. Maximum points of the country got to the parameter-"friendly" (in the range from 5,2 to 6,0 points) [7, c. 10].

In general, it should be noted, that the World Economic Forum for nearly three decades studying the issue of national competitiveness. Given the importance of travel and tourism industry for the world economy, the objective of the report " The travel and tourism competitiveness report 2011" is the study of factors that promote the development of travel and tourism in the world.

Thus, it becomes particularly relevant to conduct cluster analysis of world tourism potential and positioning of Kazakhstan in it.

As a result, multi-dimensional classification was obtained 5 clusters:

- first cluster combines 2 regions-China and Russian Federation;
- in the second cluster included 2 subjects: Republic of Kazakhstan and Ukraine;
- third cluster combines 4 regions-France, Britain, USA and Spain;
- fourth cluster constituted-Italy, Czech Republic and Mexico;
- fifth cluster-Hong Kong (China).

The results of the cluster analysis are presented in Table 1.

Table 1: The results of cluster analysis by the level of development of tourism potential

s/n	Country	Normative and legal regulation	Environmental protection	Safety and security	Sanitary conditions	The value that the government give to the tourism industry	Air transport infrastructure	Transport infrastructure
1st cluster	PRC	3,76	3,53	4,08	4,09	4,54	3,78	3,99
	Russia	2,71	2,96	3,66	5,73	3,13	4,23	3,52
Average score for the 1st cluster		3,2	3,2	3,9	4,9	3,8	4,0	3,8
2nd cluster	Republic of Kazakhstan	3,54	3,67	4,15	5,3	3,2	2,76	3,19
	Ukraine	3,99	3,04	4,23	5,55	3,25	2,56	3,39
Average score for the 2nd cluster		3,8	3,4	4,2	5,4	3,2	2,7	3,3
3rd cluster	France	5	5,5	5,22	6,27	4,69	5,45	6,44
	Britain	5,54	5,52	4,88	5,7	4,38	5,59	5,52
	USA	5,48	5,15	4,84	5,72	4,1	6,75	5,77
	Spain	4,95	4,51	4,84	5,93	5,54	5,17	5,42
Average score for the 3rd cluster		5,2	5,2	4,9	5,9	4,7	5,7	5,8
4th cluster	Italy	4,56	4,26	4,73	6,41	3,86	4,2	3,77
	Czech Republic	5,15	4,82	4,74	5,32	3,97	3,39	4,27
	Mexico	5,13	4,35	3,54	5,05	4,65	3,87	3,57
Average score for the 4th cluster		4,9	4,5	4,3	5,6	4,2	3,8	3,9
5th cluster	Hong Kong (China)	5,76	5,11	5,07	6,62	5,18	4,83	6,46
Average score for the 5th cluster		5,76	5,11	5,07	6,62	5,18	4,83	6,46

| s/n	Country	Tourism infrastructure	Information and communication technologies	Price competitiveness	Human resources	Amicableness	Natural and cultural resources
1st cluster	PRC	1,72	2,62	5,42	5	3,82	4,35
	Russia	3,17	3,01	4,84	5,05	4,34	4,74
Average score for the 1st cluster		2,4	2,8	5,1	5,0	4,1	4,5
2nd cluster	Republic of Kazakhstan	2,15	2,34	4,72	5,17	5	3,15
	Ukraine	2,66	2,56	4,89	5	5,21	3,12
Average score for the 2nd cluster		2,4	2,5	4,8	5,1	5,1	3,1
3rd cluster	France	5,4	4,83	3,35	5,42	4,42	5,95
	Britain	5,23	5,73	3,3	5,97	4,43	6,32
	USA	6,5	5,54	4,06	5,99	4,09	6,42
	Spain	5,8	3,93	3,93	5,3	5,09	5,62
Average score for the 3rd cluster		5,7	5,0	3,7	5,7	4,5	6,1
4th cluster	Italy	6	4,48	3,43	5,26	4,79	5,5
	Czech Republic	4,49	4,49	4,03	5,5	4,65	5,8
	Mexico	3,58	2,74	4,23	5,24	4,5	5,22
Average score for the 4th cluster		4,7	3,9	3,9	5,3	4,6	5,5
5th cluster	Hong Kong (China)	2,79	4,98	4,98	5,93	5,6	4,78
Average score for the 5th cluster		2,79	4,98	4,98	5,93	5,6	4,78
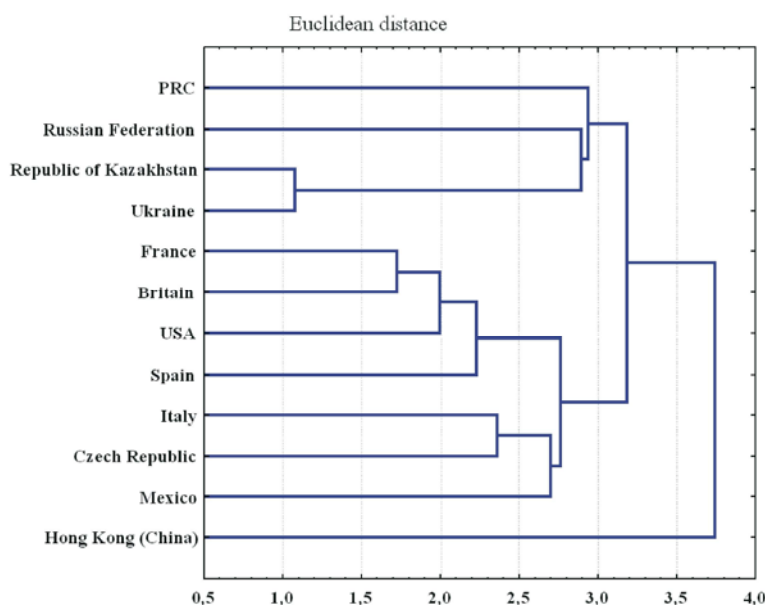
Fig. 1: Dendogramma of the countries in terms of tourism development

Figure 1 provides a graphical result of the partition the study population into clusters of regional subjects.

Analyzing the resulting of the classification, it can be noted, that the third cluster includes 4 countries (France, UK, USA and Spain) is a region with a high level of attractiveness of tourism. Analyzed data of this region exceeded the corresponding figures of belonging to a fourth cluster, on average, 1,2 times that fall into the fifth cluster-1,0 times, fall into the second-1,4 and caught in one cluster-in 1,3 times.

Thus, the third cluster evaluation was as follows, according to the parameters: normative and legal regulation-5,2 points; environmental protection-5,2 points, protection and security-4.9; sanitation-5,9, a value which the government give to the tourist industry-4,7, air transport infrastructure-5,7 points; transport infrastructure-5,8 points, the level of development of tourism infrastructure-5,7, the state of information and communication technologies-5,0, the level of price competitiveness-3,7 points, human resources-5,7 points; friendliness-4,5 points, natural and cultural resources-6,1 points.

Regions that fall in the second cluster have significantly lower values of the indicators, which points to their less attractive for tourism development.

The analysis showed that in the regions included in the second cluster, expertise marks in the average indicators was distributed as follows: normative and legal regulation-3,8 points, environmental protection-3,4 points,

safety and security-4,2; sanitation-5,4 points, meaning that the government give the tourism industry-3,2 points, air transport and infrastructure-2,7 points, transport infrastructure-3,3 points, the level of development of tourism infrastructure-2,4, the state of information and communication technologies-2,5, the level of price competitiveness-4,8 points, human resources-5,1 points; friendliness-5,1 points, natural and cultural resources-3,1 points.

CONCLUSION

Entering Kazakhstan in the 2nd cluster together with Ukraine not to say that these countries do not have the prospects for tourism development-on the contrary, these regions, particularly Kazakhstan, have all the prerequisites for the development of tourism.

But, at this moment, a number of indicators of these regions have a low estimate.

Thus, Kazakhstan and Ukraine must to develop a number of government programs aimed at eliminating and reducing the gap with the leading countries in the above criteria in order to be competitive regions in the world tourist market.

Overall, the low level of the "attractiveness" for tourism development is observed in clusters 1st and 2nd, moderate (close to the maximum)-4th cluster, the regions that are included in cluster 3rd and 5th, have a high potential for the development of international tourism.

Summarizing all the above, it should be noted, that the data in Table 1 can be used to form a local component of innovative strategies for each group.

Findings: Kazakhstan is already involved in the international markets for several years. The flow of foreign tourists to the Republic of Kazakhstan for 2006-2010 years was 227 thousand people [8, c. 18].

At the present moment the tasks of public policy for tourism development in the Republic of Kazakhstan are the following [9]:

- formation of a competitive tourism product;
- formation of tourism marketing strategy of Kazakhstan;
- human resource development of tourism industry.

The main tourism products sold on the market of Kazakhstan, are the different types of tours often combined with other bordering countries. All this suggests that the Kazakh tour operators have done a lot of work to attract and increase the tourist flow. Despite of this two points are important for further consideration [10, p. 22]:

- Kazakh tour operators and their foreign partners can sell only a limited number of competitive tourism products;
- travel products are submitted on the world market take mini segments.

Cluster analysis of the regions of the world in terms of attractiveness for tourism, will address the following objectives:

- allowed to classify regions of the world based on indicators, expert evaluations, reflecting the attractiveness of a country for the development of international tourism;

- made it possible to determine the place of Kazakhstan in the global tourism arena and highlight its strengths and weaknesses, it clear which group of regions in the world should now refer to our country in terms of attractiveness for tourism.

In general, performing cluster analysis, offers the chance to see the real picture of the situation of our country in the global market of tourist services. It should be noted, that Kazakhstan, with all the opportunities for development of tourism and will strive to reach the status of the region attractive for the development of all kinds and types of tourism.

REFERENCES

1. UNWTO World Tourism Barometer, 2012. Volume 10. January 2012. Statistical Annex.
2. Mandel, I.D., 1988. Cluster analysis. -M.: Finance and statistics, pp: 176.
3. Minus, Ya.R., L.K. Katyshev and A.A. Peresetsky, 2005. Econometrics. Basic course.-M.: Delo, pp: 186.
4. UNWTO World Tourism Barometer, 2011. 9: 1. February 2011. Statistical Annex.
5. UNWTO World Tourism Barometer, 2012. 10. March 2012. Statistical Annex.
6. The Travel and Tourism Competitiveness Report 2011, pp: 531.
7. The Travel and Tourism Competitiveness Report 2011. pp: 531.
8. Tourism of Kazakhstan for 2006-2010 years: Stat. digest / Ed. Smailov A.A. Astana, 2011, pp: 152.
9. Program of the development perspective directions of the tourism industry of the Republic of Kazakhstan for 2010-2014 years. Astana, 2010.
10. Nikitinsky, E., 2008. Kazakhstan should become a center of tourism in Central Asia" // InfoTses. 2008 (February 15). No 7, pp: 22-25.