

PROBLEMS OF STRATEGIC MANAGEMENT AT INDUSTRIAL ENTERPRISES

Annotation

This article is devoted to one of the most important economic problems of strategic management in industrial enterprises. The goal of developing strategic management in industrial enterprises is to solve problems and find ways to ensure the economic stability of enterprises at the expense of internal reserves. Strategic management is currently experiencing an upswing due to the revision of its basic postulates in connection with the changed business environment, and not least due to the emergence and widespread use of integrated systems.

Today, strategic management is undergoing a stage of revision of its main postulates conditionally, based on the changed business conditions of enterprises and due to the emergence and widespread use of integrated systems.

The results of the research article the main problems of the processes of strategic management in industrial enterprises: a mismatch of methods of developing managerial decisions in the conditions of functioning of economic systems; the lack of a precise definition of strategy as an economic category; the relationship of stages of strategic goal setting and analysis and their methodological features; the problem of justification and the expression of the strategy through a system of economic indicators; the lack of time available for adjustments to the strategy during its implementation. The solution of these problems and the correctness of the chosen management methods largely depend on the knowledge, qualifications and experience of the Manager.



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**TOURISM BRANDING OF KAZAKHSTAN AS A DRIVER FOR TOURISM
INDUSTRY DEVELOPMENT**

Many countries made efforts to develop tourism as a promising and highly profitable industry, which caused high competition between destinations in the international tourism market. In such conditions the state's marketing policy played a huge role at national and regional levels.

The article is devoted to the analysis of the current level of tourist complex development in the Republic of Kazakhstan, as well as its competitiveness on a global scale. During the analysis of statistical

data, the authors identified the place of the tourism industry in the Republic of Kazakhstan, its importance for the national economy, the main development trends were formulated. In addition, based on the analysis of Travel and tourism Competitiveness report over the past 6 years, factors for increasing the competitiveness of the national tourism industry were pointed out. Particular attention is paid to the analysis of the competitive advantages of domestic tourism and its prospects in the competition. Based on the analysis, the authors tried to formulate the directions of the strategy for improving the competitiveness of the tourism industry in the Republic of Kazakhstan through increasing the effectiveness of marketing and branding.

Keywords: *tourism branding, tourism destination, tourism development, tourism competitiveness, marketing, Kazakhstani tourism, global ranking, tourist arrivals, growth, tourism management.*

Кілт сөздер: *туризм брендингі, туристік бағыт, туризмнің дамуы, туризмнің бәсекеге қабілеттілігі, маркетинг, Қазақстан туризмі, жаһандық рейтинг, туристік келу, туризмді басқару.*

Ключевые слова: *брендинг туризма, туристическое направление, развитие туризма, конкурентоспособность туризма, маркетинг, казахстанский туризм, глобальный рейтинг, туристские прибытия, управление туризмом.*

JEL classification: L83, M31, Z32, Z33

Introduction. The continued growth of international tourism confirms that this sector of the economy has become one of the most important components of the modern economic space [1]. Over the past six decades, world tourism has shown steady growth and diversification, becoming one of the largest and fastest growing sectors of the economy in the world.

Kazakhstan possessing unique natural resources, cultural heritage, historical monuments, including those located along the Great Silk Road, can harmoniously integrate into the international tourism market and achieve its intensive development, which will ensure sustainable growth of employment and the development of related industries, increased income and investment inflows into the national economy [2].

But at the same time, Kazakhstan with rich tourism and recreational potential is characterized by an insufficient level of tourism development. According to the Travel and tourism competitiveness reports by World Economic Forum (WEF), its share in GDP is 1.6% [3]. However, today the existing potential and opportunities are not fully used, and the impact of tourism on the economic growth of Kazakhstan is insignificant and does not correspond

to the tasks set in the annual Messages of the Head of State, in particular, «The Way of Kazakhstan–2050: Common Goal, Common Interests, Common Future» [4], «Nurly Zhol - The Path to the Future» [5].

The purpose of this study is to analyze the competitiveness of tourism in the Republic of Kazakhstan using the travel and tourism competitiveness index published in the report of the World Economic Forum and make relevant suggestions regarding further tourism industry development through comprehensive branding.

To achieve this goal, comparative analysis method based on data in 2013, 2015, 2017 and 2019 was employed. In addition, the study used statistical methods, such as the grouping and statistical analysis methods. The results of the analysis showed that although the tourism industry of the Republic of Kazakhstan improved its position as compared to 2013, it was unable to improve its own competitive strength compared to other countries, and it was located in a group of countries with low level of tourism competitiveness.

Literature review. Tourism destination branding is a relatively new problematic field of research in tourism marketing, which has recently attracted the attention of a growing

number of specialists. Abroad, one of the first works in this area appeared in the second half of the 1970s. From the very beginning, the study of the phenomenon of the brand of the tourist territory followed the mainstream of marketing research of the essence of the brand, the mechanism of its functioning and the branding methodology. Building on key marketing branding concepts [6, 7], the authors tried to apply them in a tourist context and take into account the specifics of tourist destinations as a special type of products and objects of promotion. Building strong brands is beneficial for a number of stakeholders, including the consumer and the branding company. The benefits of effective branding from a consumer perspective, which according to Keller [6], include «... identification of the source of the product, lower risk, lower search costs, quality signal».

Aaker [7] defines the benefits for a corporation in terms of brand value as increasing the efficiency and effectiveness of marketing expenses, brand loyalty, ability to maintain higher prices/margins, trading (distribution network) leverage, the ability to add brand extensions and a competitive advantage. He describes brand equity assets as brand loyalty, name recognition, perceived quality, other brand associations and brand assets, such as trademarks.

The consumer-based brand concept was applied to travel destinations by Pike [8], who explored the concepts of brand significance, brand associations, and brand resonance with potential short-range consumers in Queensland, Australia.

An analysis of the literature on branding shows that most authors have identified the benefits of branding in terms of the target area or marketing organization. Most often, the main benefit of branding includes the «greater competitive advantage».

The primary role of destination marketing organizations (DMOs) is to increase the competitiveness of their tourist destinations. Pike suggested that a competitive tourism destination has a balance between an effective market

position, a profitable tourism business, an attractive environment, a positive experience for visitors and the support of local residents [9]. Market positioning is an attempt to be seen among competitors and to uphold something significant in the minds of target consumers [7]. Positioning requires the consistent use of a narrow focus on one or more attributes or advantages that are decisive in the minds of the target segment. This requires compromises in deciding which features to enable and exclude in marketing communications. Among Kazakhstani reputable authors engaged in research in the field of branding, the following should be noted: A. Tleuberdinova [10], L. Iztleuova [11], B. Akhatova, K. Pavlenko [12] and others.

Discussion and results. According to the Concept of the tourism industry development in the Republic of Kazakhstan until 2023 [13], the potential of Kazakhstani tourism is not fully realized, since the development of the tourism industry directly depends on the creation of a modern competitive tourism complex, including natural and climatic conditions, the necessary infrastructure (transport, aviation, railway, engineering, communications and «soft infrastructure»), tourist attractions, places of entertainment, catering establishments, etc., providing vast opportunities to meet the needs of Kazakhstani and foreign citizens in travel services.

According to experts, one of the main reasons for the insufficient development of the tourism sector in Kazakhstan is the lack of acceptance of tourism as an economic activity by local administrations. The tourism industry is a powerful socio-economic and political factor that determines the development of the economy and politics of many countries and regions of the world. In some countries, tourism has become the main sector of the economy, which made its economic situation dependent on international tourism. The volume of international tourist flows, which is one of the main indicators of tourism development in the country, is presented in table 1.

Table 1

Dynamics of international tourist flows in Kazakhstan in 2013-2018, people *

	2013	2014	2015	2016	2017	2018
Number of visitors for outbound tourism	10 143 710	10 449 972	11 302 476	9 755 593	10 260 813	10 646 241
including:						
CIS countries	9 037 804	9 375 785	10 356 151	8 958 939	9 257 951	9 549 292
Foreign countries	1 105 906	1 074 187	946 325	796 654	1 002 862	1 096 949
Number of visitors for inbound tourism	6 841 085	6 332 734	6 430 158	6 509 390	7 701 196	8 789 314
including:						
CIS countries	6 213 390	5 655 246	5 835 592	5 935 690	7 060 630	8 177 101
Foreign countries	627 695	677 488	594 566	573 700	640 566	612 213

* Note - compiled by the author based on the source [14]

Between 2013 and 2018, there has been an increase in the number of arriving tourists by almost 2 million people. The maximum (8 789 314) inbound tourist inflow was registered in 2018, as an effect of the International Specialized Exhibition EXPO-2017, which is called a strategic bonus for the industry.

The main trend in the flows of both inbound and outbound tourism is that they occur

between Kazakhstan and the CIS countries. In order to form a complete understanding of the trends that took place between 2013 and 2018 regarding the number of tourists (including residents and non-residents) served by the accommodation, it is necessary to analyze them by the regions of the Republic of Kazakhstan (Table 2, Table 3).

Table 2

The number of inbound tourists served by placements in the period from 2013 to 2018 by regions, people

	2013		2014		2015		2016		2017		2018	
	Quantity	Share, %										
1	2	3	4	5	6	7	8	9	10	11	12	13
The Republic of Kazakhstan	586 038	100	679018	100	692 213	100	722 515	100	891 911	100	830922	100
Akmola	9 260	2	13 678	2	8 025	1	12 609	2	17 235	2	13 747	2
Aktobe	8 520	1	10 061	1	9 411	1	10 323	1	9 900	1	12 251	1
Almaty	1 065	0	748	0	735	0	1 914	0	2 327	0	3 958	0
Atyrau	122074	21	99 688	15	70 672	10	58 060	8	55 530	6	67 146	8
West Kazakhstan	13 241	2	11 813	2	15 178	2	14 085	2	21 415	2	20 937	3

Менеджмент және маркетинг / Менеджмент и маркетинг

1	2	3	4	5	6	7	8	9	10	11	12	13
Zhambyl	1 290	0	1 905	0	1 984	0	2 545	0	2 742	0	3 940	0
Karaganda	15 918	3	17 832	3	14 952	2	17 509	2	20 827	2	19 804	3
Kostanay	6 820	1	7 516	1	8 425	1	12 111	2	18 049	2	20 408	3
Kyzylorda	1 262	0	1 754	0	1 742	0	2 939	0	3 173	0	3 396	0
Mangistau	29 162	5	29 870	4	47 840	7	28 114	4	28 726	3	28 720	4
South Kazakhstan *	14 638	2	10 750	2	11 650	2	13 045	2	22 341	3	10 570	1
Pavlodar	7 835	1	7 122	1	11 399	2	8 565	1	10 262	1	11 466	1
North Kazakhstan	3 145	1	3 459	1	3 442	0	5 058	1	8 242	1	6 847	0
East Kazakhstan	18 846	3	19 279	3	20 587	3	22 463	3	23 177	3	28 846	4
Astana city **	109952	19	155327	23	164 777	24	205 188	28	294157	33	191681	23
Almaty city	223010	38	288216	42	301394	44	307 987	43	353626	40	365137	44
Shymkent	-	-	-	-	-	-	-	-	-	-	22 068	3

* South Kazakhstan region was renamed into Turkestan

** Astana was renamed to Nur-Sultan

Note - compiled by the author based on the source [14]

As shown in Table 2, the leading regions in the number of foreign tourists served at various locations is Almaty (with a share of 38%, 42%, 44%, 43%, 40% and 44% for the analyzed period), so we can say that approximately 40% of all non-residents coming to the country were placed in Almaty.

The following Table 3 provides similar information on domestic tourist flows.

Compared with the share of foreign tourists served in hotel establishments, priority among residents was given to other destinations, namely the Almaty region, the city of Almaty and the city of Astana.

Table 3

The number of domestic tourists (residents) served by accommodation in the period from 2013 to 2018 by regions, people

1	2013		2014		2015		2016		2017		2018	
	Quantity	Share, %										
2	3	4	5	6	7	8	9	10	11	12	13	
The Republic of Kazakhstan	2721714	100	3125429	100	3110012	100	3495267	100	4387495	100	695942	100
Akmola	240 189	9	238 263	8	218 165	7	287 830	8	324 164	7	324 951	7
Aktobe	75 738	3	74 956	2	74 178	2	74 421	2	90 550	2	112 150	3
Almaty	115 477	4	195 970	6	264 084	8	433 325	12	701 336	16	805 836	17
Atyrau	110 209	4	89 477	3	141 084	5	141 943	4	128 823	3	141 914	3
West Kazakhstan	57 791	2	61 117	2	79 283	3	72 783	2	90 906	2	79 749	2
Zhambyl	85 138	3	95 171	3	91 685	3	88 231	3	101 170	2	116 996	3

Менеджмент және маркетинг / Менеджмент и маркетинг

1	2	3	4	5	6	7	8	9	10	11	12	13
Karaganda	199 065	7	243 086	8	243 963	8	223 751	6	271 682	6	260 895	5
Kostanay	175 016	6	178 701	6	152 834	5	134 479	4	174 125	4	192 845	4
Kyzylorda	37 423	1	39 733	1	37 631	1	46 546	1	56 019	1	60 120	1
Mangistau	147 136	5	144 616	5	128 228	4	163 967	5	177 178	4	212 078	5
South Kazakhstan *	103 147	4	122 556	4	132 910	4	185 470	5	247 633	6	139 967	3
Pavlodar	86 339	3	98 422	3	99 057	3	105 492	3	137 223	3	115 274	2
North Kazakhstan	62 051	2	61 064	2	64 771	2	85 958	2	112 423	3	145 277	3
East Kazakhstan	368 184	14	433 784	14	403 749	13	438 415	13	462 980	11	536 184	12
Astana city	498 365	18	575 486	18	558 055	18	527 576	15	695 048	16	575 906	12
Almaty city	360 446	13	473 027	15	420 335	14	485 080	14	616 235	14	719 854	15
Shymkent	-	-	-	-	-	-	-	-	-	-	155 946	3

* *South Kazakhstan region was renamed into Turkestan*

** *Astana was renamed to Nur-Sultan*

Note - compiled by the author based on the source [14]

To determine the competitiveness of the tourism industry, the results of a number of international ratings are used. In the world, the most recognized and respected competitiveness rating is the Report of the World Economic Forum, published every two years [3, 12, 13, 14]. The Travel and Tourism Competitiveness Index (TTCI) in 2013 contains data for 140 countries. The Travel and Tourism Competitiveness Index (TTCI) in 2015 included 141 countries. The Travel and Tourism Competitiveness Report for 2017 covers profiles of 136 countries, while in 2019 the number of countries covered by the study amounted to 140, and contains extensive data on global ratings taking into account 90 indicators in accordance with the TTCI methodology.

Datasets representing global ratings for all indicators give an idea of the global situation with the most relevant available indicators in the field of tourism and travel. Through detailed assessments of TTCI around the world in numerous areas, the ratings can be used by any interested parties to improve industry competitiveness in their respective national eco-

nomies. It also allows country authorities to track their progress in various areas measured over time [3, 15, 16, 17].

According to estimates by WEF experts, in 2019 Kazakhstan occupies the strongest positions in the rating for the development of information and communication technologies (60th place), safety and security (63rd place) and the favorable business climate (49th place). In terms of price competitiveness, Kazakhstan ranks 4th among 140 countries.

In terms of the quality of tourism infrastructure (hotels, resorts, entertainment venues), Kazakhstan occupies 90th place. Experts did not appreciate the country's openness to international travelers (113th place). Among the criteria by which openness was assessed, visa requirements should be especially noted, Kazakhstan takes 81st place in the world in this indicator, and according to the concluded agreements on air services, the country takes 123rd place.

According to the ecological situation (ecosystem sustainability), the country took 118th place. In the category «Health and

Hygiene» Kazakhstan occupies 12th place in the world. The authors of the rating explain this high result by the presence of a large number of doctors and hospital beds, as well as the absence of cases of malaria.

The final benchmark of the TTCI report is the prioritization of travel and tourism industry, the information on which is presented in Table 4. In general, the position of Kazakhstan in determining priorities in the field of

travel and tourism improved by 2 points, taking only 91st place in 2019. WEF experts assessed government spending on tourism development (45th place) as individual criteria for the «Priority of Government in Tourism and Travel» position, while the effectiveness of marketing and branding in promoting the country as a tourist destination slightly improved its position, taking 99-th place. The country branding strategy rating worsened from 102 to 120 lines in 2019.

Table 4

The position of Kazakhstan in the ranking of WEF TTCI-2013, 2015, 2017, 2019 in the context of determining the priority factors of tourism and travel

Indicator	2013		2015		2017		2019	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Prioritizing Travel and Tourism	90	4.2	84	4.4	93	4.3	91	4.3
Government Priority in Travel and Tourism	95	4.8	103	4.6	94	4.3	82	4.7
Public expenditures on T&T,% of the state budget	50	4.1	50	4.1	46	4.2	45	4.2
The effectiveness of marketing and branding to attract tourists	125	3.2	111	3.8	102	3.6	99	3.8
Completeness of annual T&T data, 0–120 (best)	28	80.0	46	78.0	59	72	81	64
Timeliness of providing monthly / quarterly data, 0–21 (best)	71	13.5	12.0	94	88	16.5	87	16.5
Country brand strategy ranking, 1–10 (best)	-	-	50	74.2	102	64.7	120	61

Note - compiled by the author based on the source [3, 15, 16, 17]

The most deteriorating indicator is the country’s branding strategy rating, which evaluates the accuracy of the strategy of the National Tourism Organization in the field of tourism. A low rating indicates two possible problems: incorrect promotion of destination brand tags, which is measured by the total number of online requests; or lack of focus on best-selling brand tags. Much attention should be paid to improving the effectiveness of marketing and branding to attract tourists. However, some work was done in this regard, pulling

Kazakhstan from the bottom of the rating (125th place in 2013) to 102nd in 2017 and 99th place in 2019, the need to continue it is obvious.

The priority of the government in the field of travel and tourism is also noteworthy, at the moment Kazakhstan is 82nd out of 140 tourist destinations in the world. Thus, the Government of Kazakhstan needs to develop a comprehensive strategy for the development of the tourism industry through appropriate activities in the field of marketing and branding to attract foreign tourists, as well as align standards on

tourism statistics in Kazakhstan with international requirements.

Conclusion. The development of tourism is one of the priority areas for the development of the economy of the Republic of Kazakhstan, which necessitates further research on its competitiveness, identifying competitive advantages in order to create a strong brand of domestic tourism, attracting tourists' interest from both near and far abroad, and as a result boost the number of international arrivals in Kazakhstan.

World experience suggests that countries that are actively developing tourism, allocate significant budgetary funds for the implementation of national projects and programs, providing high-quality tourism services.

The main reasons hindering the accelerated development of tourism in Kazakhstan, based on the conducted research of TTCI reports include:

- 1) Inadequate country brand strategy (ranking 120 out of 140 countries);
- 2) Low effectiveness of marketing and branding to attract tourists (99th position);
- 3) Timeliness of providing monthly / quarterly data (87th position);
- 4) Insufficient Government priority in travel and tourism (82nd position).

5) Completeness of annual T&T data, which suggests that the data provided is not comprehensive enough (81st position).

In this regard, it is necessary to constantly monitor the competitive positions of Kazakhstan as a tourist destination, improve its marketing and promotion, as well as make every effort in providing relevant data in timely and complete manner. It is also necessary to regularly analyze the concepts of perception of foreign citizens for the timely adoption of measures that will help significantly strengthen the image and position of Kazakhstan, as well as contribute to the development of Kazakhstani tourism and the diversification of the country's economy as a whole.

Analyzing the change in the main economic indicators of tourism development, the potential of Kazakhstan tourism can be fully realized through the creation of a modern competitive tourist complex. The creation of a modern competitive tourist complex is able to make a significant contribution to the development of the country's economy through tax revenues to the budget, the influx of foreign currency, an increase in the number of jobs, as well as ensuring control over the conservation and rational use of cultural and natural heritage.

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**ҚАЗАҚСТАН ТУРИЗМІНІҢ БРЕНДИНГІ ТУРИЗМ ИНДУСТРИЯСЫН
ДАМУЫН ДРАЙВЕРІ РЕТІНДЕ**

Аңдатпа

Көптеген елдер туризмді перспективалы және жоғары табысты сала ретінде дамыту үшін елеулі күш-жігер жұмсап келеді, бұл өз кезегінде халықаралық туристік нарықтағы дестинациялар арасында жоғары бәсекелестік тудырады. Мұндай жағдайда мемлекеттің маркетингтік саясаты ұлттық деңгейде де, өңірлік деңгейде де үлкен роль атқарады.

Мақала Қазақстан Республикасындағы туристік кешеннің қазіргі даму деңгейін, сондай-ақ оның әлемдік ауқымдағы бәсекеге қабілеттілігін талдауға арналған. Статистикалық деректерді талдау барысында авторлар Қазақстан Республикасындағы туризм индустриясының орнын, оның ұлттық экономика үшін маңызын анықтады, дамудың негізгі үрдістері тұжырымдалды. Бұдан басқа соңғы 6 жылда саяхат пен туризмнің бәсекеге қабілеттілігі туралы есепті талдау негізінде ұлттық туризм индустриясының бәсекеге қабілеттілігін арттыру факторлары көрсетілді. Отандық туризм индустриясының бәсекелестік артықшылықтарын және олардың даму перспективаларын талдауға ерекше назар аударылды. Жүргізілген талдау негізінде авторлар маркетинг пен брендинг тиімділігін арттыру есебінен Қазақстан Республикасында туризм индустриясының бәсекеге қабілеттілігін дамыту стратегиясының бағыттарын тұжырымдауға тырысты.

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**БРЕНДИНГ ТУРИЗМА КАЗАХСТАНА КАК ДРАЙВЕР ДЛЯ РАЗВИТИЯ
ИНДУСТРИИ ТУРИЗМА**

Аннотация

Многие страны прилагают значительные усилия для развития туризма как перспективной и высокодоходной отрасли, что в свою очередь порождает высокую конкуренцию между дестинациями на международном туристическом рынке. В таких условиях маркетинговая политика государства играет огромную роль как на национальном, так и на региональном уровнях.

Статья посвящена анализу современного уровня развития туристического комплекса в Республике Казахстан, а также его конкурентоспособности в мировом масштабе. В ходе анализа статистических данных авторы выявили место индустрии туризма в Республике Казахстан, ее значение для национальной экономики, сформулированы основные тенденции развития. Кроме того, на основе анализа отчета о конкурентоспособности путешествий и туризма за последние 6 лет были указаны факторы повышения конкурентоспособности национальной индустрии туризма. Особое внимание уделено анализу конкурентных преимуществ отечественной индустрии туризма и перспектив их развития. На основании проведенного анализа авторы попытались сформулировать направления стратегии развития конкурентоспособности индустрии туризма в Республике Казахстан за счет повышения эффективности маркетинга и брендинга.

