

BRANDING OF TOURIST CLUSTER SYSTEMS: CASE OF ALMATY MOUNTAIN CLUSTER IN THE REPUBLIC OF KAZAKHSTAN

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Abstract: In modern conditions, the competitiveness of many tourist centers is ensured through the development of forms of network interaction between entities involved in the process of tourist services within a certain geographical area. One of these forms of networking is a tourist cluster, which is based on such concepts as "integration", "cooperation", "competition". Each system in the field of tourism needs to be promoted and popularized among tourists, including the cluster. In this regard, the main purpose of this work is to consider the issues of branding tourist clusters on the example of the Almaty Mountain cluster in the Republic of Kazakhstan. As part of the study on specifics of cluster systems branding, the authors relied on scientific publications presented in various periodicals. To identify the main trends in the development of tourism and clusters in Kazakhstan, the data presented on the official websites of state bodies and statistical services were employed. Based on the presented analysis, the authors considered the main characteristics of the Almaty Mountain cluster development, as well as the features of branding this territory at the national and local levels. The main stages of territory branding are presented, taking into account the main characteristics of the cluster system. In general, within the framework of the work, the authors put forward the main directions for the formation and promotion of cluster systems brand in modern conditions. At the same time, it is noted that the branding process should ensure the sustainable development of integration and cooperation ties between the participants of the tourism cluster.

Key words: tourism, tourist cluster, territory, tourist routes, brand, geobranding, brand book, tourist center

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INTRODUCTION

Clustering of tourist territories is currently one of the processes that play an important role in the development of regional tourism and the formation of the tourist attractiveness of the region. Clustering is one of the systems that rationally promote attractive tourism products, including convenient accommodation, transportation and other services, by combining various companies and organizations operating in the tourism sector, such as hotels, travel agencies, transport companies operating in tight competitive conditions. For example, a number of authors note that tourism is a highly agglomerated industry and the integration ties formed within the framework of servicing tourists become more stable over time, groups of enterprises involved in a single value chain increase their common competitive advantages, as a result of which the territory turns into an attractive destination. (Elsner, 2010; Delgado et al., 2014; Benner, 2017; Yurensky, 2021).

The clustering of the tourist area can be due to several factors. Firstly, geographical features, that is, a combination of various geographical places, such as tourist areas, recreational areas, beaches, lakes. Each of these geographical places can be of interest to visiting tourists. Secondly, cultural and historical attractions: some tourist areas may have a rich history and cultural heritage, which can attract tourists interested in history, art and architecture. Thirdly, the availability of infrastructure: the clustering of a tourist area may also depend on the availability of certain infrastructure, such as various accommodation facilities, transport services. The presence of such infrastructure can significantly increase the

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attractiveness of the tourist area and interest more tourists. Fourthly, the diversity of recreation types, if the tourist area can offer different types of recreation such as sports tourism, ecotourism, cultural and educational tourism, gastronomic tourism, then it is possible to cluster the tourist area, serving different groups of tourists with these offers.

Today, cluster policy is used in many countries as one of the effective ways to make the region more attractive from a tourist point of view. Clusters are an important tool for supporting small and medium-sized businesses, increasing exports, attracting investment, creating jobs and ensuring sustainable economic growth. In modern conditions, one of the main trends in the development of clusters is strengthening of interaction between cluster members at the international level. With globalization and advances in technology, we see clusters becoming more global and export-oriented.

Another important factor in the development of clusters is environmental sustainability. In general, today the creation and development of clusters is becoming more and more relevant, therefore their role and importance in the national economy of various countries is increasing. To increase competitive advantages, clusters, including those operating in the tourism sector, need to promote their unique characteristics and available resources by means of various marketing tools. One of the main goals of promoting a certain regional system in the field of tourism is to popularize the region and turn it into an attractive destination (Hartman, 2023). In this regard, branding is one of the most important tools for popularizing the area today. Cluster branding makes it possible to determine its uniqueness and attractiveness for potential investors and partners, and also helps to increase the recognition of the cluster and its products, increase customer loyalty and strengthen public relations. Cluster branding is a tool that helps create an image of a cluster, improve its recognition, stand out from competitors, and implement its marketing strategy in effective and successful manner in the future. World practice shows that often individual tourist areas in Turkey, Greece, Georgia have become attractive to tourists due to the correct strategy for branding the area (Kirillova and Gerasimova, 2019; Limonina and Karaseva, 2022). In the process of branding clusters, the following tasks are solved: firstly, the advantages and differences from competitors are determined, secondly, the trust in the area among the target audience of tourists increases, and thirdly, interest is formed among investors who are ready to invest their assets in the field of tourism and leisure.

However, the process of branding cluster systems is a rather long and complex process that requires a comprehensive study of the main approaches to branding and forming the image of a cluster. It should be noted that the peculiarity of cluster systems branding is the creation of conditions for the further development of integration links between cluster members. Based on this, the issues of branding cluster systems require further comprehensive study from a scientific point of view.

LITERATURE REVIEW

The issue of branding tourism clusters in the scientific literature is considered in a fairly broad aspect. Today, the branding process depends on many exogenous factors, which often determine the specifics of the formation of clusters in a certain tourist area and the priorities of its development. In this regard, in order to describe the key features of tourism cluster branding, it is necessary to reveal its nature and main characteristics. It should be noted that in the economic and geographical literature, a single point of view on the definition of the concept of "tourist cluster" has not yet been formed. Each author, considering this definition, presents characteristics depending on the aspects inherent in the development process of a particular cluster. One of the first attempt to describe the concept of "cluster" in the economic system was presented by M. Porter (Delgado et al., 2014), who defined a cluster as geographically concentrated groups of interconnected companies, specialized suppliers, service providers, firms in the relevant industries, as well as organizations related to their activities in certain areas, competing, but at the same time conducting joint work.

Based on the presented interpretation, it can be judged that the cluster is characterized by such characteristics as: geographical localization, when cluster members are concentrated within the boundaries of a certain geographical area; general characteristics of the activity of cluster subjects, where cluster members are involved in general economic and production processes; market orientation of the cluster, which is determined by the fact that cluster members integrate with each other in order to form common competitive advantages. Thus, the classical interpretation of the cluster determines its understanding as a group of geographically adjacent interconnected companies (Aslanova and Alimova, 2020) and related organizations of a certain area, characterized by a common activity and complementary to each other.

The specificity of clusters, their role in the national and regional economies stimulated a high scientific interest in studying the nature and content of clusters in various countries. Considering the work of researchers (Swann et al., 1998; Feser and Bergman, 2000; Schmitz, 2005; Elsner, 2010; Vysochan et al., 2021; Jang and Kim, 2022) we can summarize the essential features of modern clusters:

- belonging to the same sector (industry), functioning in close proximity to each other;
- location in one geographical area (Vysochan et al., 2021);
- a group of related companies, interacting institutions, united by commonalities and complementarities;
- the presence of both vertical and horizontal functional links between companies.

From the point of view of the economic approach, a cluster is considered as a form of increasing the joint competitive advantages of economic entities operating in interconnection with each other within any tourist area. For example, Yurensky D.A., considering the problems of globalization of tourism, notes that modern clusters act as an effective territorial form of increasing the competitiveness of tourism enterprises (Yurensky, 2021). Today, one of the main goals of the tourism enterprise is to ensure sustainable development in a rapidly changing external environment.

In modern conditions, rather new factors are formed in the external environment of the enterprise (Azmi et al., 2023) that influence the change in consumer preferences and the conditions for servicing tourists. The rapid variability and unpredictability of the operating conditions of tourism enterprises force them to look for new ways to ensure not only the

survival of an individual subject, but also the formation of competitive advantages for a group of interconnected enterprises through the joint use of the tourist potential of the territory and the unique socio-cultural environment of the area. Based on this definition, we can assume that one of the features of the tourist cluster is the presence of business entities that operate in a common socio-cultural environment and are focused on efficient activities.

A number of scientists consider the tourism cluster from the point of view of an institutional approach and define it as a modern institution that combines a system of formalized and non-formalized relations of its participants between themselves and the external environment (Rodrigues, 2001; Scholz et al., 2012; Stepanova and Makhnovskiy, 2010). For example, Kizim A.A. notes that "... a tourism cluster is a set of companies located in the same territory that produce a tourist product, infrastructural tourism organizations and authorities regulating this area, the competitiveness and efficiency of each of which depend on the performance of all other subjects of the cluster" (Kizim et al., 2010). It should be noted that each element of the tourist cluster is interconnected with each other and the effective development of one component depends on the other. As part of the organization of economic activity, tourism enterprises operating as part of the tourism cluster, depending on the specifics of the products sold, have fairly close horizontal and vertical ties (Rodrigo et al., 2023).

In addition, in order to support and determine development priorities, the cluster can include both government bodies and entities engaged in research activities. The presence in the cluster of fairly closely related enterprises, public and other organizations, government agencies and other entities gives reason to judge that the cluster can act as a separate institution with its own characteristics. In addition, the closeness of vertical and horizontal links, as well as the degree of their coverage of various processes (from the development of a tourist product to the implementation and rendering service to customers) determines such cluster features as the depth and width of clustering.

The specifics of the tourism cluster can be considered from the point of view of regional management. European scientists note that "... a tourist cluster can act as a mechanism for regional development aimed at strengthening the interests of the region, its independence and competitiveness" (Novelli et al., 2006, 1146). O. Petrova and M. Klevchenkov indicates that each cluster, including the tourist one, is a growth point for the development of the region's economy, involving other activities in the orbit of its activities. All enterprises whose activities are in one way or another connected with the regional tourist complex make investments in specialized technologies, information, infrastructure, human resources, which leads to the mass formation of new allied enterprises (Petrova and Klevchenkov, 2010).

This implies such a sign of a cluster as being limited within the boundaries of a geographical region or district, as well as the ability to attract both economic entities and other enterprises operating on the scale of a given region, subordinating them to the general conditions of development. A number of scientists suggest not to consider the geographical localization of enterprises as an integral feature of a tourist cluster. Thus, E. Karpova, analyzing clusters in tourism as an innovative form of modernization and diversification of the economy of the territory and a factor of its sustainable competitiveness, proposed to define a tourism cluster as a set of interacting and interconnected companies and organizations that are functionally isolated within the value accumulation system ("channel chains") - marketing - transport services - accommodation facilities - food establishments - entertainment facilities - consumption of complex tourist services", united on the basis of cooperation and competition in order to obtain maximum income based on the local advantages of the territory, including tourist attractors and infrastructure (Karpova, 2012). On the one hand, the use of such an approach leads to the blurring of the concept of "tourist cluster". However, on the other hand, this approach takes into account the peculiarities of tourism services, as well as the role and position of tour operators. Most scientists, however, consider the geographical localization or concentration of tourism enterprises as one of the specific features of the tourism cluster (Kazmina et al., 2023; Shin et al., 2023). In our opinion, this is a reasonable approach that allows us to distinguish a tourist cluster from a territorial tourist and recreational complex that can successfully function without forming a cluster.

M. Beni also moved away from using the sign of the geographical concentration of enterprises and focused on tourist attractions. In his opinion, a tourist cluster is a group of tourist attractions in a limited geographical area, provided with a high level of infrastructure and service development, with well-established social and political ties, as well as well-functioning management in companies that form networks for the production of tourist services, providing strategic competitive and comparative benefits (Beni, 2003). A number of researchers (Nikolaevna et al., 2014; Jorgensen, 2017; Omarov et al., 2020, Tchetchik et al., 2023) believe that the creation of a tourist (or tourist-recreational) cluster actually determines the positioning of the territory and affects the formation of an image of a region. This circumstance is the specificity of a tourist cluster. In addition, it should be noted such special consequences of the creation of a tourism cluster as natural restrictions on the development of other types of activities in the territory, primarily those that can adversely affect the ecological situation or the state of other tourism resources. Another characteristic inherent in the tourism cluster is that the integration of enterprises in the cluster is carried out through the creation of a tourism product. Since the tourist product, in fact, acts as a complex of individual tourist services, perceived by the consumer as a whole, a sound concept and strategy are of key importance for the successful functioning of the cluster (Sizeneva et al., 2018), includes cluster specialization, key growth points of the cluster, composition and structure of enterprises in the tourism cluster.

In general, it should be noted that in modern domestic scientific and practical literature there are two approaches to the interpretation of the concept of "tourist cluster". Firstly, the tourist cluster is considered as a tourist and recreational special economic zone. Secondly, the tourist cluster is interpreted as a geographically localized group of enterprises operating in the tourism and recreational sector. In the framework of this work, taking into account the above characteristics, we understand the tourist cluster as a group of enterprises, firms, attractions involved in the process of serving tourists within the boundaries of a certain geographical area, and between which stable ties have been formed that provide them with competitive advantages in the tourist services market.

It should be noted that even though the characteristics of tourist clusters are widely covered in the scientific works of researchers from different countries (Delgado et al., 2014; Benner, 2017; Karanovich, 2019; García-Villaverde et al., 2020; Danylyshyn et al., 2022), the issues of cluster branding remain poorly understood. Most of the authors in their works focus on the specifics of the clustering of the area (Bouchra and Hassan, 2023), determine the reasons for the formation of integration processes between the subjects of the local tourism market (Perkins et al., 2022), empirically substantiate the degree of agglomeration and convergence (Gómez-Vega et al., 2022; Glyptou et al., 2022). The tourist cluster is primarily a system that operates within a certain geographical area and is aimed at ensuring sustainable functioning. In this regard, it needs to promote and implement measures that make it widely recognizable among the tourist audience. Based on this, within the framework of the current paper, the main approaches to branding a tourist area are considered on the example of the Almaty Mountain cluster. Based on the study of the specifics of the development and functioning of the Almaty Mountain cluster in today's conditions, steps have been identified corresponding to the characteristics of the area to promote the area as a destination.

MATERIALS AND METHODS

Within the framework of the study, scientific works of foreign and domestic authors were used as the main sources. As part of determining the main trends in the development of tourism in the Republic of Kazakhstan, describing the process of formation and development of a tourist cluster in the country and considering the main tools for branding tourist areas, including clusters, statistical data presented on the official Internet sources of the Bureau of National Statistics of the Republic of Kazakhstan, the Committee of Tourism Industry of the Ministry of Culture and Sports of the Republic of Kazakhstan, as well as local executive authorities. It should be noted that in some cases, when considering the priorities for the development of tourist areas in the country, the main sources of information were the State programs approved by the Government of the Republic of Kazakhstan, as well as master plans developed by NC JSC “KazakhTourism” and local Akimats.

Such theoretical research tools as analysis, synthesis and the axiomatic method were used as part of studying the specifics of the formation and functioning of tourist clusters, as well as describing the characteristics of its main elements, patterns of development in modern conditions, identifying the specific features of branding it as a tourist system. Employing these methods in the framework of the study made it possible to identify the main characteristics of the tourist cluster, to determine the specific features of its branding and promotion as an integral system. For example, the theoretical analysis made it possible to decompose the tourist cluster into its constituent parts and identify the main characteristics of the elements, determine the role of each element in the promotion and branding of the tourist territory, and describe the features of the interaction of subjects with each other in the framework of forming the image of the territory. Further, using synthesis tools, the elements identified earlier were combined and considered as a single system, which made it possible to reveal the general characteristics of the branding process of an integral system, acting in the form of a tourist cluster.

In order to study the contradictions between the elements of the cluster that arise within the branding of the tourist territory, the methodology of the categorical-symbolic approach was used, which is an element of such a scientific approach as homeostatics (Figure 1). Hence, the main factors that need to be taken into account when branding the tourist cluster were identified. Each element of the cluster, despite the presence of integration links with other elements of the cluster, tries to operate with these factors based on the specifics of its economic activity, as a result of which contradictions are formed. The identification of these contradictions makes it possible to determine the main measures to improve the efficiency of branding not only of the territory, but also of the system functioning as a cluster.

In general, within the framework of studying the features of branding tourist clusters and describing the specifics of the implementation of this process, a number of axioms were put forward, i.e. a set of provisions that were identified as true characteristics of the cluster branding process. Thus, the following axioms were put forward:

- a close integration of economic activities of enterprises involved in the process of serving tourists has a significant impact on the process of natural formation of the brand of the tourist territory;
- the process of branding the territory begins with the activities of small tourist companies, but later all cluster members are involved in this process, and the complex image of the tourist territory depends on the specifics of their market behavior;
- the process of territory branding depends not only on the available tourist resources of the territory and the degree of their involvement, but also on the reaction of the local population to tourism, which are part of the socio-cultural environment of the tourist territory, including the cluster.

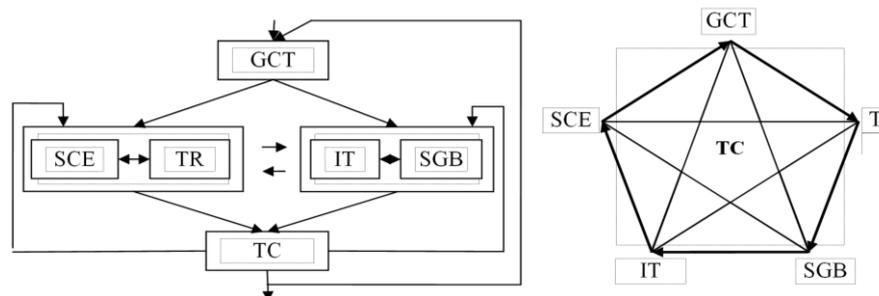


Figure 1. Homeostat and pentagram demonstrating the process of tourism cluster branding (TC - tourist cluster, GCT - geographical characteristics of the territory, TR - tourist resources and natural objects, SCE - socio-cultural environment of the area, IT - infrastructure of the territory, including tourism, SGB - stakeholders and government bodies interested in tourism development) (Source: the figure was compiled by the authors)

The research algorithm consisted of the implementation of a number of measures aimed at studying both theoretical and practical features of the process of branding tourist clusters in Kazakhstan (Figure 2). A certain research algorithm, as well as its step-by-step implementation, made it possible to confirm, and in some cases reject the correctness of the presented axioms.

RESULTS AND DISCUSSIONS

Tourism in the Republic of Kazakhstan is one of the priority areas for the development of the national economy. To date, the main goal of developing tourism in Kazakhstan is to create a modern, highly efficient and competitive tourism complex, on the basis of which conditions will be provided for the development of the industry as a sector of the economy, integration into the system of the world tourism market and development of further international cooperation in the field of tourism. There are more than 100 water clinics in the country, more than 9000 archaeological and historical monuments (Issakov et al., 2023), most of which are located in the southern regions of the country. Given that Kazakhstan has a unique natural potential, the country has all the opportunities for the development of various types of tourism: cultural, educational, ecological, extreme, business, health and others (Atasoy et al., 2022).

Recently, thanks to the ongoing measures to develop tourist areas, there has been an increase in the indicators reflecting development of the tourism sector. A number of tourist centers are beginning to be in demand not only by domestic tourists, but also by foreign guests. Thus, in 2022, the number of served visitors in the country amounted to 7,335.2 thousand people (Statistics of tourism, 2023), which is 25.4% more compared to the same period. The number of accommodation facilities providing accommodation services for domestic and foreign tourists amounted to 3,970 units, where 2,316 accommodation units are located in cities, and 1,654 - in rural areas (Figure 3).

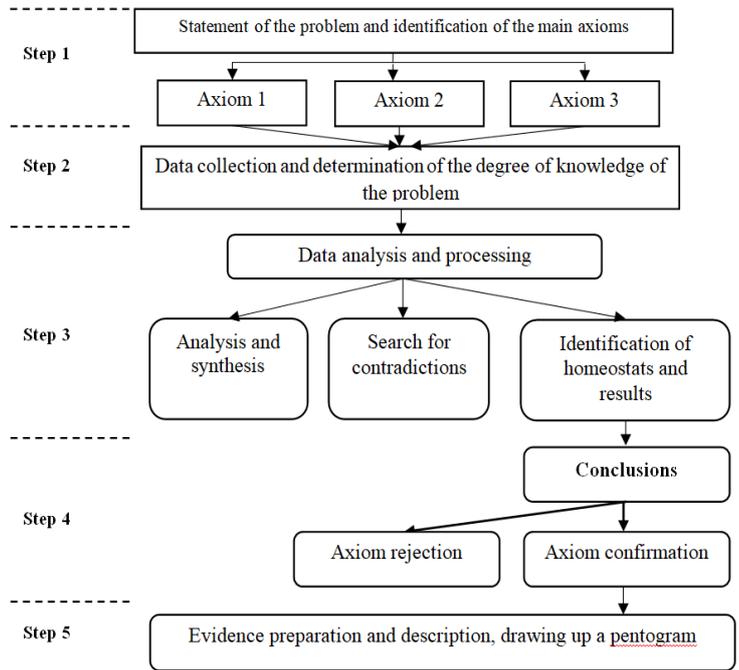


Figure 2. Methodology of research (Source: compiled by the authors)

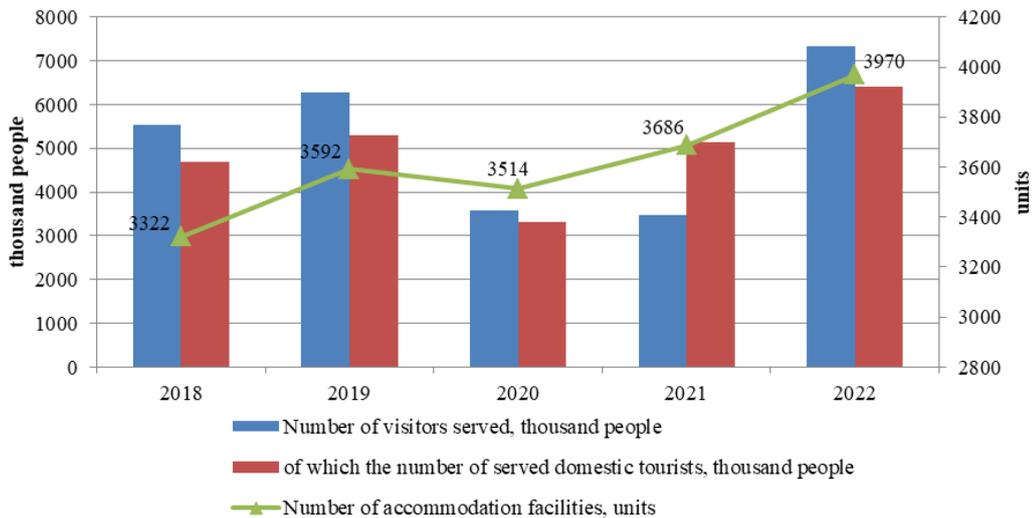


Figure 3. The number of served tourists and accommodation facilities in the Republic of Kazakhstan, for the period 2018-2022 (Source: the chart was compiled by the authors based on data from the Bureau of National Statistics of the Republic of Kazakhstan)

Figure 3 clearly shows that the state of tourism industry development in Kazakhstan in recent years is characterized by its progressive and sustainable development. Currently, in order to create the necessary conditions for the development of tourism infrastructure at the level of the Government and local authorities, a concept has been developed (Concept of development of the tourism industry of the Republic of Kazakhstan for 2023–2029, 2022), programs (State program for the development of the tourism industry of the Republic of Kazakhstan for 2019–2025, 2018), roadmaps (State program for business support and development "Business Roadmap-2025", 2019) and investment master plans (Master Plan for Tourism of the Almaty-Bishkek Economic Corridor. Asian development bank, 2019; Concept of the Master plan for the development of the city "G4 City" in the Almaty region, 2022). Thus, as part of the implementation of the State Program for the Development of the Tourism Industry for 2019–2025, the following main measures were introduced: the "Tax free" system (value-added tax refund from a purchase made by a foreign citizen) was introduced;

the list of visa-free countries has been expanded to 79 countries, migration cards and registration of foreigners for a period of up to 30 days have been cancelled; a survey was carried out, places were identified where it is necessary to have sanitary and hygienic units with indication of locations; in 2020, the main emphasis was placed on the allocation of funding under the Employment Roadmap program, which financed the construction of 23 projects in the amount of 14.8 billion tenge, as well as 99 points of sanitary facilities in the amount of 1.0 billion tenge; the Program "Economy of Simple Things" includes 5 codes of the general classifier of economic activities of tourism and financed more than 58 projects worth more than 26 billion tenge with a loan term of up to 10 years; within the framework of the "Business Roadmap - 2025", more than 177 projects were financed in the amount of more than 60 billion tenge with a loan term of up to 5 years; a concept for the development of state national natural parks was developed and detailed, which became the basis for the adjusted master plans; 4 strategic investors were involved in the SNNP of the Almaty region, who are successfully implementing their projects, the "Open Skies" mode has been introduced at 12 airports in Kazakhstan; in 2020, the International University of Tourism and Hospitality (in accordance with the concept of development of the tourism industry of the Republic of Kazakhstan for 2023-2029) was opened in the city of Turkestan.

In recent years, the conditions for the development of the tourism industry have changed dramatically. The main reasons include the impact of the COVID-19 pandemic, the political and economic confrontation of some states, the formation of completely new consumer preferences among tourists, the active use of new digital technologies in tourism services, etc. These aspects have formed quite new conditions for the development of tourism in some areas. A number of countries were forced to reconsider the priorities of their tourism policy. Thus, in Kazakhstan, in order to adapt to new conditions, the Concept for the Development of the Tourism Industry of the Republic of Kazakhstan for 2023-2029 has been developed and is being implemented. In the Republic of Kazakhstan today, 10 main tourist areas have been identified in relation to which work is being carried out to turn them into attractive, competitive destinations. These include: Astana, the Burabai resort area, Alakol Lake, the mountain cluster of the Almaty region, the Bayanaul resort area, the Imantau-Shalkar resort area, the Baikonur space complex, Mangystau, Lake Balkhash, Turkestan (Figure 4).

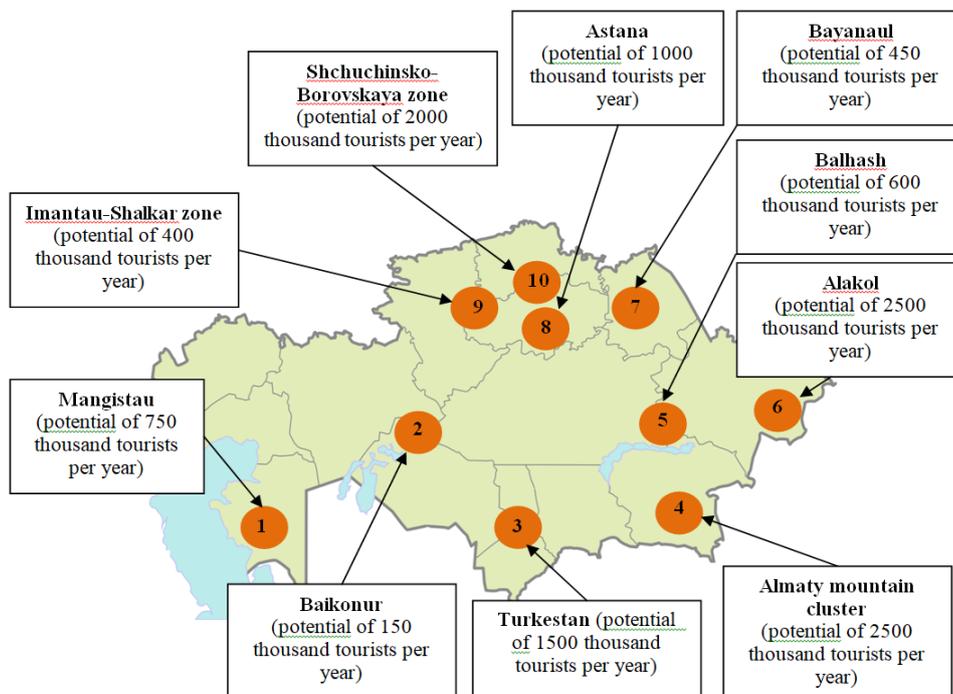


Figure 4. TOP-10 destinations of Kazakhstan envisaged for development (Note: the figure was compiled by the authors on the basis of the State Program for the Development of the Tourism Industry for 2019-2025)

One of the promising destinations, which is most attractive for Kazakhstani tourists and visitors from neighboring countries, is the Almaty Mountain cluster. This cluster was created on the basis of the infrastructure of the city of Almaty, the state national natural parks "Altyn Emel", "Ile-Alatau", "Kölsay Kölderi", "Charyn Canyon". Today, more than 60 tourist attractions are located on the territory of the Almaty Mountain cluster, the natural environment has a unique appeal. For example, the territory of the SNNP "Ile-Alatau" is divided into zones of conservation regime (total area 62,137 ha), environmental stabilization (16,412 ha), tourist recreational activities (15,408 ha), limited economic activity (105,295 ha), where there are such tourist sites as: Big Almaty Lake (average number of visitors for 2019-2022 is 120 thousand people), Aksai (7 thousand people), Kaskelen (9 thousand people), Butakovka (13 thousand people), Issyk (30 thousand people), Turgen (33 thousand people), Maralsay (4 thousand people), Kotyrbulak (4 thousand people).

In general, for the development of the infrastructure of this cluster, it is planned to implement a set of measures, which include the construction of a visitor center upstream of the Gorelnik thermal spring (the total cost of the project is 100 million tenge), in the areas of Mynbulak, Shygan, Aktau, Katutau, Kosbastau SNNP "Altyn-Emel", under the coordination of the Akimat of the Almaty region, the construction of 6 sanitary and hygienic units is being completed, in the SNNP "Ile

Alatau” it is planned to build 7 visit centers in 5 gorges, 10 glamping sites, an ethno village, caravanning centers, it is planned to equip 155 km of hiking trails(investments are provided for these purposes) in the amount of 10 billion tenge). General characteristics of the objects included in the Almaty mountain cluster are given in Table 1.

Table 1. Characteristics of SNNPs, the infrastructure of which is involved in the Almaty Mountain cluster (Source: Compiled by the authors based on sources)

SNNP "Ile Alatau"	SNNP "Kolsai Kolderi"
Total area - 199,252 ha: - protected regime - 62,137 ha; - environmental stabilization - 16,412 ha; - tourist and recreational activities - 15,408 ha; - limited households. activities - 105,295 ha.	Total area - 161,045 ha: - reserve regime - 62,527 ha; - environmental stabilization - 16,715 ha; - tourist and recreational activities - 6,720 ha; - limited households. activities - 70,083 ha.
Tourist potential - 5,000,000 people.	Tourism potential - 500,000 people.
Tourist flow for 2021 - 214.8 thousand people.	Tourist flow for 2021 - 85.1 thousand people.
Guest houses - 38	Guest houses – 110
Beds - 1 400	Beds - 1 198
The planned investment volume for 2020-2025 is 10 billion tenge	The planned investment volume for 2020-2025 is 5 billion tenge
SNNP "Altyn Emel"	SNNP "Charyn Canyon"
Total area - 307,653 ha: - protected regime - 51,969 ha; - environmental stabilization - 71,303 ha; - tourist and recreational activities - 12,679 ha; - limited households. activities - 171,702 ha.	Total area - 307,653 ha: - reserve regime - 9,428 ha; - environmental stabilization - 13,147 ha; - tourist and recreational activities - 49,249 ha; - limited households. activities - 35,923 ha.
Tourist potential - 200,000 people.	Tourist potential - 190,000 people.
Tourist flow for 2021 - 10.1 thousand people.	Tourist flow for 2021 - 18.1 thousand of people.
Guest houses – 4	Guest houses – 4
Beds - 46	Beds - 54
The planned investment volume for 2020-2025 is 5 billion tenge	The planned investment volume for 2020-2025 is 4.5 billion tenge

In general, investments in the amount of more than 25 billion tenge have been attracted to form an infrastructure that meets the modern needs of tourists. The main investors are both domestic and foreign enterprises interested in the development of tourism in the area. For example, in order to increase the attractiveness of the Kolsai Lakes State National Park, which is an integral part of the cluster, a domestic investor was attracted, who plans to carry out geological and geodetic surveys and build tourist facilities worth more than 5 billion tenge by 2025. In virtue of the measures implemented on the basis of close integration ties between the main stakeholders interested in the development of tourism in the area, the attractiveness of the Almaty Mountain cluster compared to other tourist centers in Kazakhstan has increased significantly. Thus, according to the Bureau of National Statistics, in 2022, 7,335,162 tourists were served in Kazakhstan, where more than 26% of tourists account for the Almaty Mountain cluster (Figure 5). The main difference between a cluster in the tourism sector and all kinds of others (manufacturing, agro-industrial, service, etc.) is in its route territorial organization (Karanovich, 2019). The tourist route is one of the main elements that ensure the interconnection of the elements of the tourist cluster. In addition, the tourist route determines the order of interaction between the main subjects of the tourist cluster. To date, more than 80 tourist routes are being implemented on the territory of the Almaty Mountain cluster, covering more than 160 unique natural, cultural and historical sites that are of interest to tourists (Figure 6).

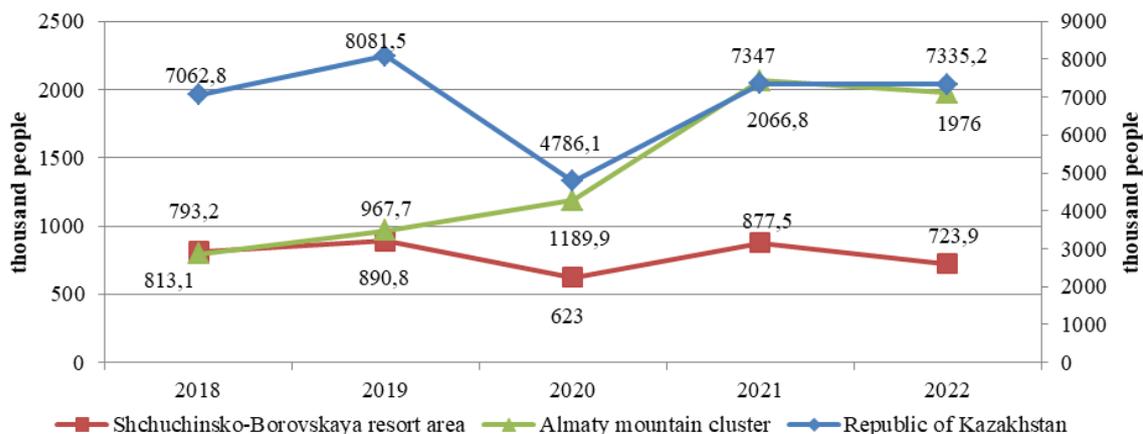


Figure 5. Number of tourists served in the main resort areas of the Republic of Kazakhstan for the period 2018-2022, thousand people (Source: the figure is based on data from the Bureau of National Statistics of the Republic of Kazakhstan)

However, there are a number of problems that prevent the formation of an active stable tourist flow in this direction. In this regard, there is an urgent need to determine the main branding approaches and create an attractive tourist image of the territory. It should be noted that one of the significant factors in the positioning and development of the territory, aimed at increasing its rating and competitiveness, its significant competitive advantage is the recognizable brand of the territory

(Kirillova and Gerasimova, 2019). Success in the formation of attractive territories primarily depends on how successfully the consciously formed brand of the place will correspond to it, i.e. its objective qualities, the expectations and demands of the consumer (tourist, investor, etc.), as well as the work of the cluster in general, to ensure the functioning of this brand (Chernyakina, 2012). In modern conditions, in many countries, one of the main criteria for the development of a tourist territory is the formation of a brand that meets the conditions of the area. For example, territorial branding, in other words, geo-branding, is one of the main tools of the UK tourism policy (Limonina and Karaseva, 2022). The country has developed a four-level system of territorial branding - from national to local. The word "GREAT" was chosen as the formalized brand (logo) of Great Britain. The name of the marketing campaign appears in the form of a logo, a national brand promoted abroad. The capital letters and the red "GREAT" typeface stand out on the billboards. It has become a kind of symbol of Great Britain. The Bureau of Tourist Marketing functions in the USA, one of the main functions of which includes the formation of brand books for the promotion of tourist areas (Melnikova and Kuznetsov, 2022).

Currently, the branding of tourist areas in the Republic of Kazakhstan is carried out mainly on the basis of a policy determined by the national operator JSC "NC "KazakhTourism" in accordance with the program documents and concepts approved by the Government. So, today, the brand book is based on the implementation of such activities as: the use of traditional brand promotion channels (television, radio, publications, outdoor video banners, etc.); preparation and display of informational videos and other video materials in the world's leading TV channels (CNN, BBC, National Geographic, etc.); involvement of public figures, industry agents of influence and opinion leaders (celebrities, bloggers, famous athletes, actors, singers, etc.); intensifying work with embassies and representative offices of countries of target markets in Kazakhstan on the promotion of

Kazakhstani tourism; using the resources of the Kazakh diaspora and Kazakh students abroad to promote Kazakh tourism; intensification of cooperation and membership in major industry associations in order to promote the tourism brand among a professional audience, potential foreign investors and partners (World Tourism Organization (UNWTO), United Federation of Travel Agency Associations (UFTAA), International Hotel and Restaurant Association (IH & RA), World Tourism and Travel Council (WTTC), World Association of Travel Agencies (WATA), Asia Pacific Travel Association (PATA), World Tourism Forum (WTF), etc. In order to provide information support to tourists, Internet resources are active, which also refers to one of the main tools for branding a tourist area.

Thus, the e-Qonaq information system is being introduced, mobile applications are being developed aimed at improving the comfort of a guest's stay in the country's tourist centers, official pages on social networks have been created, where information is updated daily. In each regional administrative center, visit centers have been established that have personal websites where information about the tourist centers of the region, routes, excursion programs and events is posted. However, despite the work on the implementation of the above activities, the tourist centers of Kazakhstan, including the Almaty Mountain cluster, are little recognizable, especially among foreign audiences.

The developed measures are being implemented within the framework of the approved State program for the development of the tourism industry for 2019-2025. The country does not have a separate concept of tourism branding, which would be based on effective strategies for promoting the state as a tourist country.

It is known, that tourist area branding is implemented at three levels: national, regional and local (Turyspekova et al., 2022). If at the national level in the country branding is carried out in accordance with state programs and concepts, then at the regional level it is based on master plans approved by local authorities. Often, activities for branding tourist areas at the regional level, reflected in the master plans, are not coordinated with the measures implemented at the national level. In some regions, the tourism sector is considered as a secondary sector and certain branding measures are entirely formal. As another problem, it is worth noting that a number of tourist centers do not have clearly developed brand books that would reflect the main strategy for promoting the area as a tourist region. Quite often, it is branding measures at the local level that contribute to the transformation of the territory into a recognizable and attractive tourist center.

As already noted, the structure of the Almaty Mountain cluster includes the city of Almaty and 4 state national natural parks (Altyn Emel, Kolsai Lakes, Charyn Canyon, Ile-Alatau). Each component of the cluster has its own symbolic image

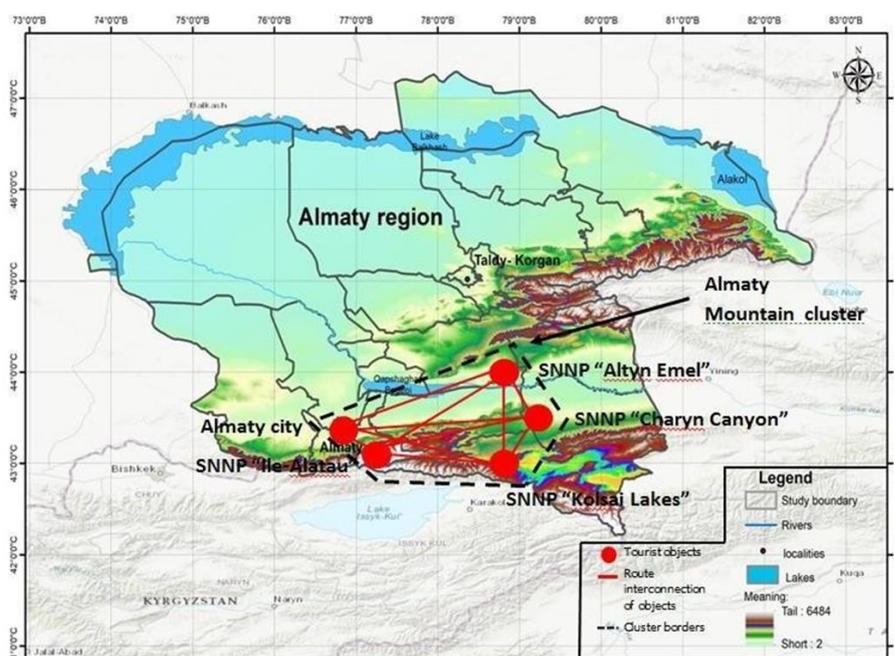


Figure 6. Almaty Mountain cluster and the relationship of its main elements
(Source: the figure was compiled by the authors based on sources)

(Figure 7), but a single cluster logo has not been developed to date. The brand image is one of the most important elements of its structure, it largely determines the quality of brand perception by consumers (Kirillova and Gerasimova, 2019). The brand image is made up of a set of attributes that accompany the brand throughout its life, and includes two main components - tangible and intangible. If the material component is the territory or product for which the brand is being developed, then the intangible component traditionally includes such visual identifiers as the brand name, slogan, logo, brand colors that will be associated with it (Danylyshyn et al., 2020). The task of brand visualization is to ensure its recognition, create associations caused by the brand, various verbal and semantic constructs formed on its basis.

Each component of the cluster under consideration, based on the characteristics of natural, historical and cultural objects on the territory, can act as a dominant and be the center of attraction for tourists. The specifics of the location of tourist facilities on the territory is such that within the boundaries of the cluster, it is possible to implement both linear and circular, radial routes, where each individual section of the cluster can be the starting point of departure.

When developing a symbolic image of a cluster, it is worth paying attention to this aspect. In other words, the color scheme, the elements of the symbolic image of the cluster should form an idea for the tourist regarding the tourist facilities available on the territory and their characteristics. It should be noted that in the minds of consumers, a tourist brand is a kind of symbol, an image that carries a semantic load and is characterized by specific products, services, phenomena that really should match or, at least, approach the expectations of consumers (Bolkunov, 2016). In addition, the recreational environment and the existing infrastructure of the cluster make it possible to fully implement eco- and ethno-tours, active and extreme, adventure tours, passive types of recreation, etc. on the territory.



Figure 7. Logos of the structural components of the Almaty Mountain cluster (Source: the figure was compiled by the authors on the basis of data from the official websites of the indicated national parks and the akimat of Almaty (www.ile-alatau.kz, www.altyn-emel.kz, www.charyn-park.kz, www.kolsai-koldery.kz, www.gov.kz/memleket/entities/almaty?lang=ru))

Practice shows that often when forming a brand of a territory, terms expressing the name of the area or individual characteristics of the territory, which form associative images or ideas of tourists about the area, play a superior role. Today, the associative vocabulary of the Almaty mountain cluster includes such high-frequency words as: Turgen, Charyn Canyon, Charyn River, Big and Small Almaty Lake, Shymbulak, Medeo, Singing Dune, Tanbalytas, etc. Using the basic terms, we have compiled an associative molecule of the Almaty Mountain cluster, which allows us to determine the verbalized and symbolic value of the cluster for visitors, and which should underlie the brand of this area (Figure 8).

The presented associative molecule is capable of reflecting the most important directions in the formation of the symbolic image of the Almaty Mountain cluster. It is the high-frequency terms of the associative dictionary that reflect the images of tourists about the area and what attracts them most in this area. In addition, the associative molecule can underlie the concept of building a brand at the local level and determine the main strategies for promoting the area.

The development and promotion of a local tourism brand is not limited to the creation of a graphic (logo) and verbal (slogan) designation and the search for communication channels for its promotion in various segments of the information space (Tiberghien, 2020). Tourism territory branding is, first of all, a set of measures that are aimed at promoting certain characteristics of the region to potential consumers (tourists, travel agents, investors in the hospitality industry) with the help of a properly created image, a key idea. Formation of a tourist territory brand is a long process and involves the implementation of a set of interrelated and combined measures. It is impossible to form a certain brand, especially territories, in one move or in one order (if private consulting or marketing firms are involved).

Branding at the local level is effective only if a well-thought-out branding strategy is developed, verified stages of strategy implementation are provided, the situation is constantly analyzed and corrective measures are taken, etc. In the development and implementation of the strategy, and in general in the preparation of the brand book of the tourist area, all stakeholders interested in the development of tourism in the area should be involved. Considering the specifics of the branding of the Almaty mountain cluster, it can be noted that, to a certain extent, the brand of the territory is formed spontaneously, and in most cases the brand is promoted by local travel companies that have developed and promoted 3- 4 day tours, mainly for domestic tourists. The analysis shows that there is a discrepancy in the priorities for promoting the brand of the area. The authorities that coordinate and regulate the tourism sector at the local level seek to promote the cluster as a multi-directional tourist center, where it is possible to implement tours of both an active and passive nature, while tourism companies mainly position it only as an ecotourism center.

Accommodation facilities are only interested in branding the areas where they are located. The contradictory nature of the projected and spontaneously formed brand, the lack of a comprehensive and constructive nature, the implemented

activities have a negative impact on the formation of a holistic policy in the field of branding of the tourist territory, as a result, today, it is not possible to fix a sufficiently clear and capacious message to the audience of potential tourists.

The study shows that today the main priorities in the field of building the brand of the Almaty Mountain cluster should be:

- formation of a brand book based on a detailed marketing, economic and socio-cultural analysis, where the philosophy, mission, values, uniqueness and position, competitive advantages of the brand of the territory should be clearly reflected. At the same time, it is necessary to pay special attention to the brand book guideline, i.e. a set of rules governing the use of the brand;

- identify the main strategies for branding the tourism cluster. At the same time, it is necessary to pay attention to the issues of brand identity, which involves the creation of a strong and memorable brand. In addition, when developing a brand promotion strategy, it is necessary to determine the level of loyalty and the degree of trust in the brand of potential visitors. It should be noted that the location branding strategy should also take into account the specifics of the integration and cooperation of subjects within the boundaries of the cluster. It is these aspects that should be a priority in the implementation of the strategy;

- it is necessary to create conditions for the conformity of the quality of services provided within the boundaries of the tourist cluster with the characteristics of the promoted brand. In other words, it is necessary to focus on the specific behavior of tourists who have already arrived for recreational purposes. The degree of satisfaction with their quality of services will affect the way in which it will notify its acquaintances - potential tourists about the area. In addition, one should not forget about the quality of related services, which also affects the tourist's perception of the territory;

- the brand should be promoted in both traditional and innovative ways and technologies. In this case, the role of digital technology and mobile gadgets is huge. Today, mobile gadgets are the main source of information for young and middle-aged people. Most services are ordered and purchased through mobile applications, less often through special software installed on personal computers. These technologies should be actively used in the branding of the tourist area. In extreme cases, this will allow a potential tourist to form an introductory image of a tourist territory, at best, arouse interest in visiting the territory, disseminating information about it in a close social environment, etc.

Of course, the definition of the above priorities and their implementation should be carried out with the direct participation of all stakeholders, from the local population to operators promoting tourism at the national level.

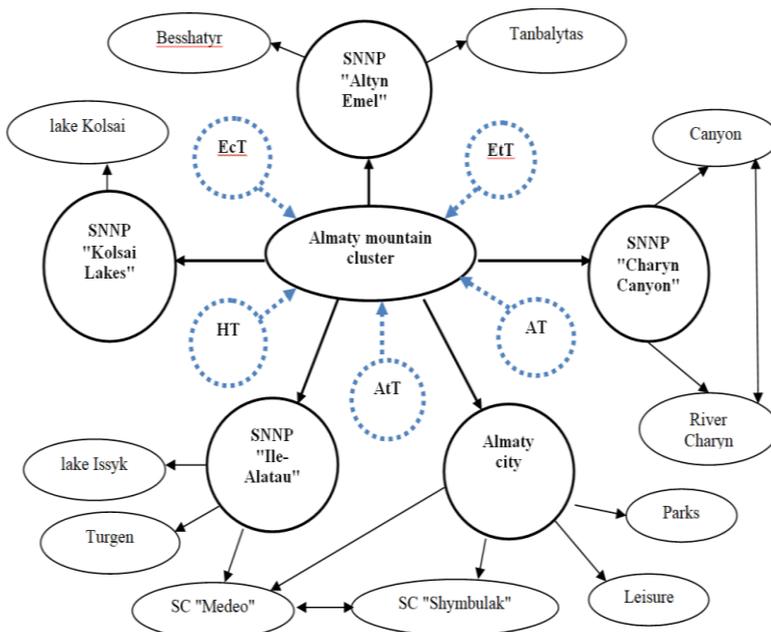


Figure 8. Branding elements (associative molecule) of the Almaty mountain cluster (EcT - ecological tourism, EtT - ethno- tourism, HT - health tourism, AtT - active types of tourism, AT - adventure tourism) (Source: the figure was compiled by the authors)

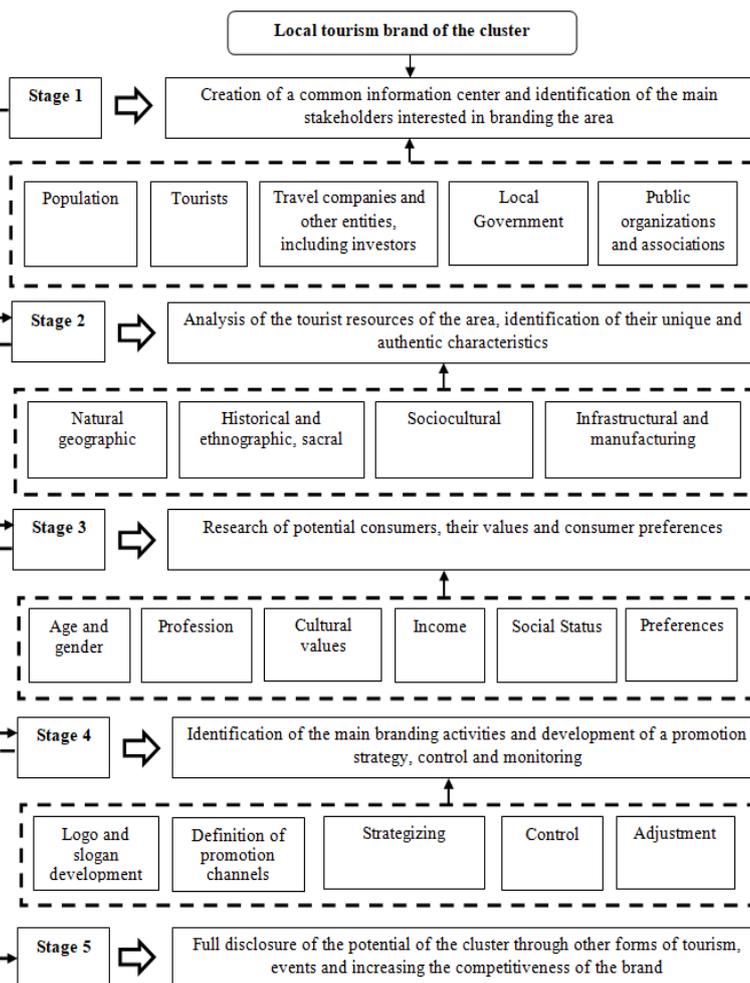


Figure 9. Algorithm for branding the Almaty Mountain cluster (Source: the figure was compiled by the authors)

The branding process should also be carried out on the basis of a well- defined plan that would be adaptable to changing conditions and would define the main stages of implementation (Figure 9).

CONCLUSION

Thus, despite the fact that clusters operating in the field of tourism increase their competitiveness due to the formation of close cooperative and integration ties between the subjects of the cluster as part of the implementation of the tourist route, branding remains one of the main tools for awakening the interest of the tourist audience in the territory in general.

In modern conditions, the process of territory branding, especially where clusters operate, should cover all the characteristics of the area, as well as take into account the unique features of not only tourist sites, but also the specifics of integration ties between subjects. It should be noted that another key feature of the branding of tourist clusters is that these cluster formations are dependent on the degree of positivity of the image that is formed among the target audience of tourists. Unlike clusters operating in other sectors of the economy, the process of production and consumption of services in the tourism cluster is carried out within its geographical boundaries. In this regard, the demand for a tourist cluster in the eyes of tourists will always depend on how positively they are generally disposed towards this tourist area.

One of the main aspects of branding cluster systems in tourism is the compatibility of a brand promotion event at the national, regional and local level. The process of branding a tourist area is quite a long and complicated process. Measures implemented at the national level should always take into account and support branding strategies and plans developed and implemented at the local and regional level. In some cases, the brand of a tourist area can be formed spontaneously under the pressure of consumer preferences of tourists and the activities of the local tourism business community to meet the needs of tourists. As the experience in the development of the Almaty mountain cluster shows, travel companies promote this area only as an ecotourism center, while at the national and regional level this territory is branded as a multidirectional center where it is possible to implement tours of both active and passive types of tourism.

The inconsistency of the implemented measures on the part of the main stakeholders leads to a decrease in the effectiveness of promoting it as a tourist area. In this case, it is necessary to note that the process of branding a tourist area, especially cluster structures, should be complex and structured, where each step should be justified and verified. In addition, branding should be considered as one of the main tools that can ensure the sustainable development of the region as a whole in the long term. When a brand of a territory or a tourist brand is created, it is rather difficult to predict exactly how and in what volumes it will bring commercial benefits. In this case, the effectiveness of territory promotion depends on branding methods. To date, a fairly good return is given by the integrated method, when tools are combined, both in the traditional way of promotion, and through digital and virtual systems.

In general, the process of branding a tourist cluster should pursue such goals as: ensuring an increase in the level of competitiveness of the territory due to the presence of a target audience of tourists in the information space, creating a holistic recognizable image of a tourist area, creating favorable conditions for the inflow of investment, developing and ensuring the sustainability of integration ties between all cluster members. Achieving these goals is the most important condition for the demand for the cluster among tourists and its sustainable development in the long term.

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