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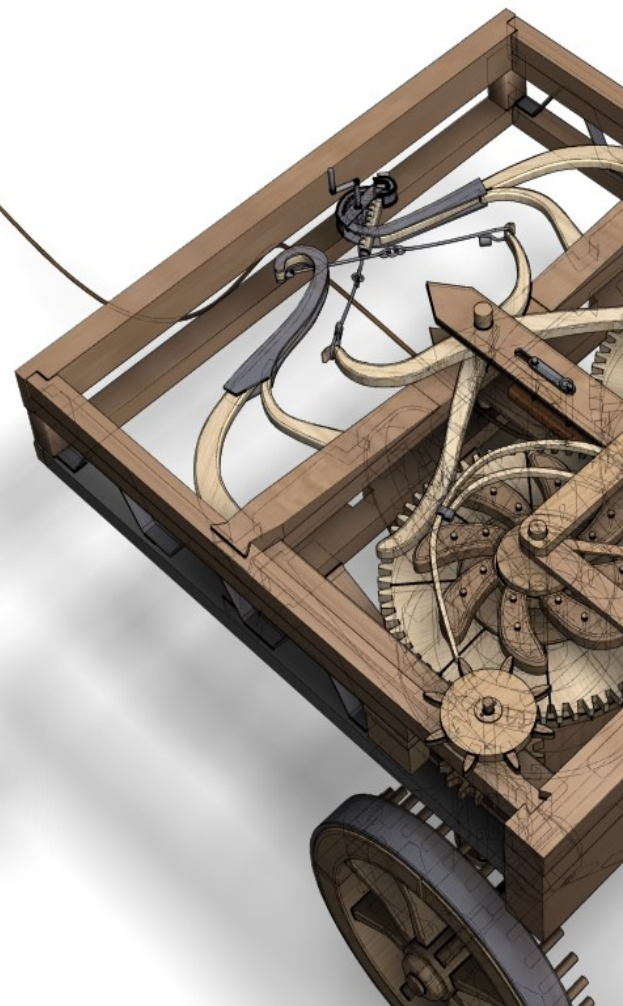
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Economic Analysis and Factors Influencing the Development of Tourism

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Abstract:

The ongoing transformations in various aspects in the field of tourism services lead to an increase in the importance of tourism in the development of the national economy, which is due to a change in the mechanism of functioning of the tourism industry, a complex impact on the economy of other industries. Taking into account the factors affecting the development of tourism, it should be noted that the industry tourism has a synergistic effect: the quality of service improves, insurance companies are attracted, new segments of tourism are emerging, new routes are being developed. Development and support of the tourism industry, the development of competition and investment attractiveness depend on a wide range of factors reflecting the general state of the economic policy of the state and the position of state institutions, in connection with which the issues of developing the entrepreneurial climate, increasing investment attractiveness and, in general, the competitiveness of the tourism sector are one of the key directions of the state's economic policy.

Keywords: tourism industry; tourism services; development strategy; tourism sector.

JEL Classification: Z31; Z32.

Introduction

Tourism today is the most dynamically developing industry with a high potential for profitability and employment. Thanks to the simplification of the visa regime, the holding of the EXPO, the creation of tourist infrastructure, new

objects of attraction, the holding of international events, the promotion of the city in foreign countries, the number of tourists in Kazakhstan tends to grow.

In the context of the digitalization of the economic system and the globalization of economic processes, tourism is a highly profitable intersectoral complex, one of the main exporters of the world economy, contributing to the strengthening of various economic, political, cultural and other ties between countries and regions, and also has the character of a social orientation of the development goals of modern society.

Companies need to apply innovative methods both in the technological process and in the methods of management activities, where, of course, the emphasis is on the financial component, which should not only improve the form and methods of management, but constantly change and flexibly rebuild depending on changes in the development strategy of the enterprise. All this motivates and encourages companies to improve business processes, and senior management to seek and implement new effective methods of business process management based on forecasting methods.

1. Literature Review

Given the multifaceted nature of the tourism industry, special attention should be paid to the establishment of effective coordination mechanisms between a wide range of actors, including government agencies, the private sector, banks, academia and civil society (population). The process of regulating the tourism industry is based on the establishment of an international legal and regulatory system, taking into account the national interests of each country, and is carried out by a number of organizations that are engaged in studying tourism issues, setting directions to ensure the sustainable development of tourism and promoting its development worldwide. Tourism has led to the development of industries such as hospitality, logistics, catering and transportation.

Regional cooperation in tourism can strengthen economic, social and cultural ties between countries, improving the image of the region and making it more attractive to foreign tourists and investment.

Digitalization and globalization of the economy, innovation in the development of new technologies, increased accessibility and social change continue to shape the further development of tourism. In this regard, the directions of tourism companies must be able to adapt flexibly in order to remain and be competitive, as well as in order to further sustainable development in building a better future.

In order to achieve the national goal of diversifying the economy and improving the welfare and quality of life of the people of the Republic, the tourism industry must develop in specific tourism clusters, with competitive tourism businesses based on qualified workers who offer attractive tourism products to domestic and foreign tourists.

Depending on the level of economic development of the country, the contribution of revenues from tourism activities to economic growth is heterogeneous in different countries. Tourism as a sector of economic activity is in many parts of the world (Butnaru and Haller 2017), (Grubor *et al.* 2019), (Sahakyan and Ghazaryan 2017), (WTTC, 2016, 2019), which prevails high potential for job creation. For many countries, it is a major source of income for both state local government and local residents, attracting investment and foreign capital. Recently, the current trend is that tourists are abandoning the standard classic vacation in favor of much more sophisticated and individualized ways of spending leisure time and interest in this sector is growing. Each destination in the tourism industry is unique, and tourists evaluate it on the basis of impressions and services provided.

The impact of tourism on economic growth is considered by many authors, such as Navarro A. *et al.* (2020), Antonakakis *et al.* (2019), Calero and Turner (2020), Cheng and Zhang (2020), Estol and Font (2017), Neuts (2020), Nunkoo *et al.* (2020), Roudi *et al.* (2019), Santamaria and Filis (2019), Sokhanvar (2019), Tang and Tan (2017), Tang (2020), Vergori and Arima (2020), and others.

Tourism contributes significantly to various areas:

- economic growth (GDP, GNP);
- environmental impact;
- the impact of innovative aspects, which make a significant contribution to scientific and technological progress.

Numerous economic, social and infrastructural factors influence the development of tourism:

- transport conditions (Borodako and Rudnicki 2018);
- geopolitical conditions (Santamaria and Filis 2019);
- attraction of foreign direct investment;
- culture, peace, security, infrastructure, visa opportunities, natural environment, people, number of tourists, education, income level, price level (Khan *et al.* 2020);
- country measurement and development (Lin *et al.* 2019);

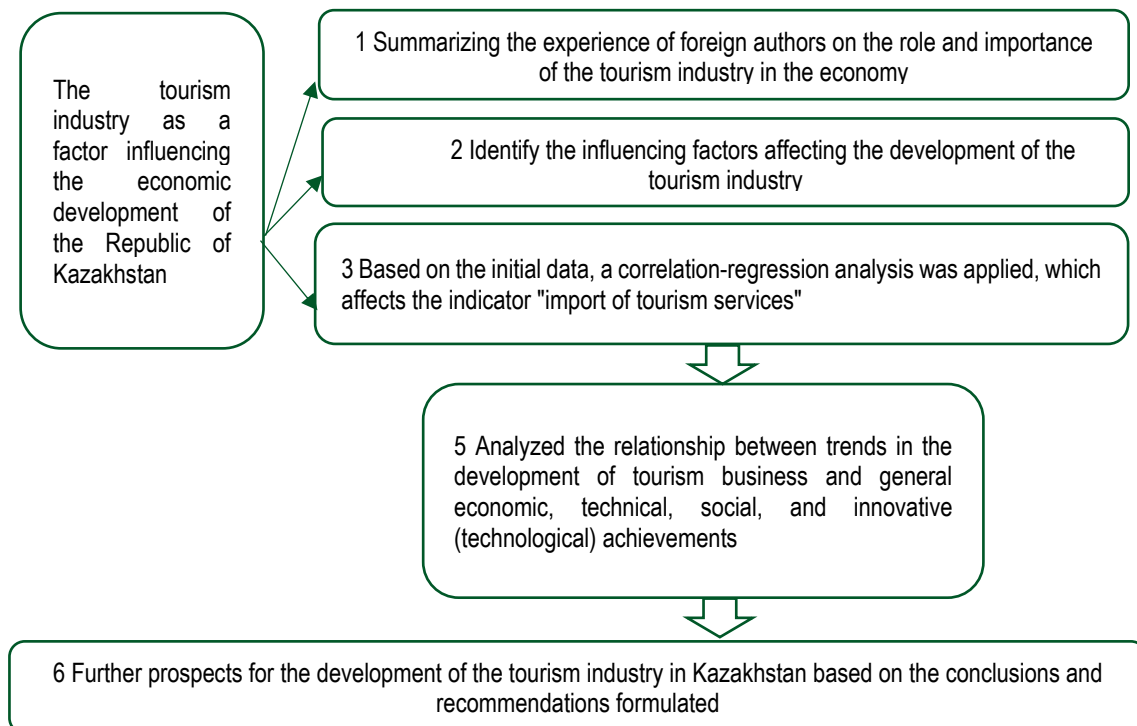
▪ cultural heritage and natural resources, and other factors related to economic growth and development (Nunkoo *et al.* 2020).

The development of tourism is characterized by a significant increase in its scale, due to the fact that this industry is one of the dynamically developing sectors of the world economy. The intensive development of markets for goods and services, the competitive environment in the field of trade in goods and international relations, and the growing trend of economic integration make it necessary to seek appropriate market mechanisms to ensure the effective functioning of the tourism industry.

2. Methodology

The tourism industry in Kazakhstan is recognized as one of the priority sectors of the economy, indicating a growing interest in Kazakhstan's tourism product and favorable trends in the growth of the number of tourists and the expansion of sales markets.

Figure 1. Research questions



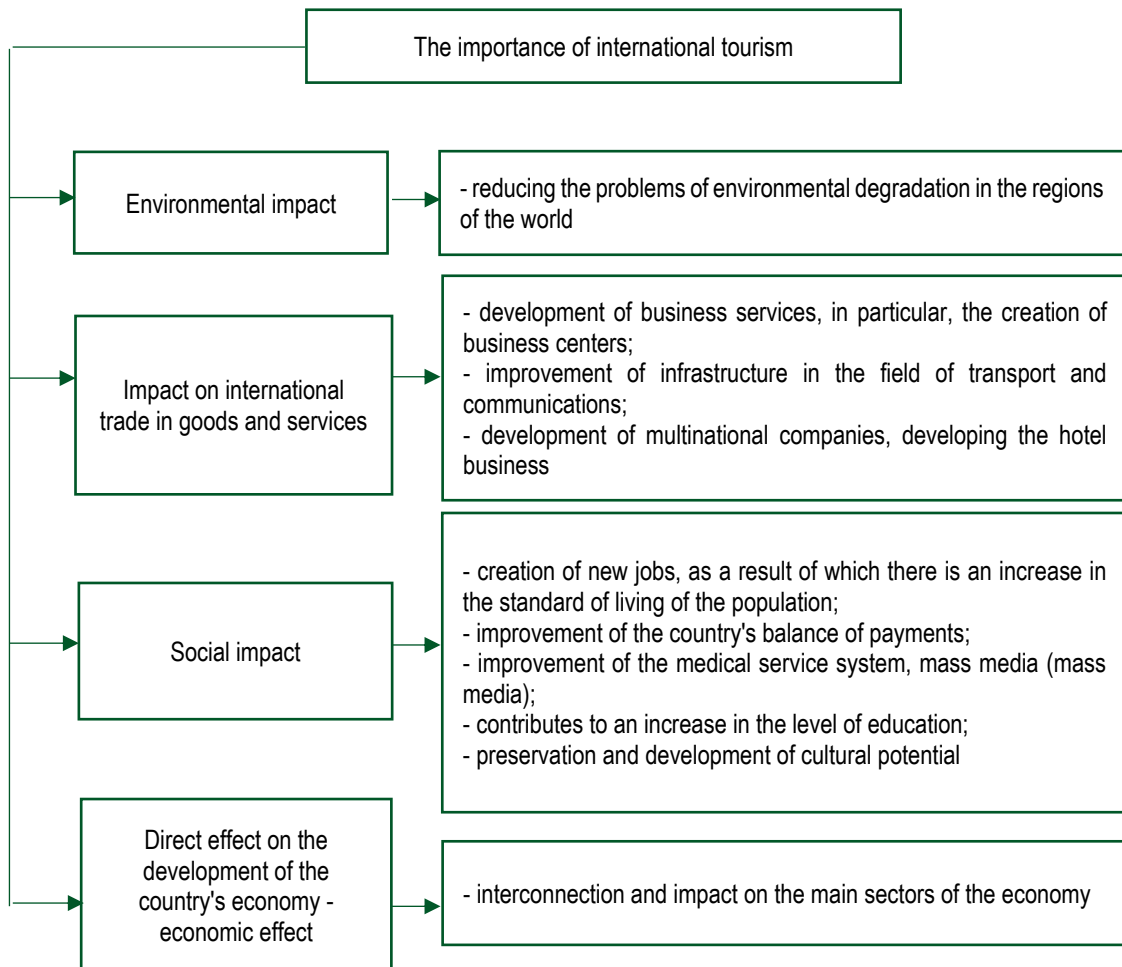
Source: compiled by authors

Currently, the economic, political and social changes taking place at the global level are becoming increasingly interconnected and interdependent, creating complex interactions that affect the tourism industry. At the same time, these changes fundamentally transform the existing development paradigms and give rise to the need to search for new ways of development and the formation of national and global interests, the creation of the necessary legal, economic and social conditions for the formation of sustainable development of a highly competitive tourism industry in accordance with international standards.

The reality today is that tourism has become one of the most powerful catalysts for mobility in modern society. This is evidenced by studies and experiences of many countries, which can demonstrate the characteristics and importance of the development of international tourism (Figure 2).

Tourism is one of the most important sectors influencing the economic growth, as evidenced by statistical data. For example, according to the legislation of the Republic of Kazakhstan, tourism includes such concepts as inbound tourism and outbound tourism (Law of the Republic of Kazakhstan). The change of consumption patterns and consideration of travel as one of the priorities of people, including inhabitants of developing countries, became possible thanks to the progress, especially in the field of transport and technology, and improvement of living conditions. Tourism contributes to the diffusion of economic effects, which creates links between sectors of the economy.

Figure 2. Features of the importance of international tourism



Source: compiled by authors

Nowadays, tourism is one of the industries that has a positive impact on the overall development dynamics of the region. According to the OECD conceptual theory "Tourism and political trends", countries should develop comprehensive measures and models of economic development policies in the tourism sector, which can reflect the situation in some countries and regions.

According to the conceptual theory of tourism, in order to achieve the objectives in the field of tourism, it is necessary to

- 1) It is necessary to provide tourists with a safe, reliable and high-quality travel experience.
- 2) Increase the productivity of SMEs in the tourism sector.
- 3) Increase the number of natural resources (tourist attractions, recreational areas) and cultural resources (crafts, unique archaeological sites).
- 4) Increase the competitiveness of the country: in the WEF's "Index of competitiveness of tourism and travel", 14 elements reflect the competitiveness of the results of 136 countries around the world in the last 5 years.
- 5) Support inclusive national and transnational growth.

3. Methodology and Analysis

Since the start of the pandemic in 2020, tourism prospects with a forecast for the future have deteriorated several times due to a rapidly changing situation and a high degree of uncertainty.

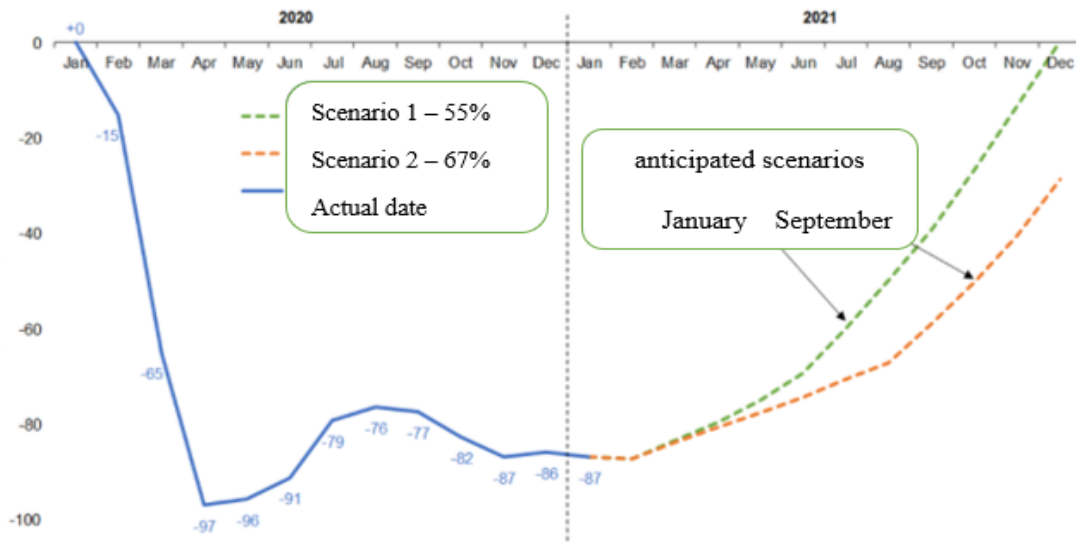
So, at the end of 2020, according to the World Tourism Organization, data were presented indicating that in the first ten months of 2020, the number of international tourist trips fell by 72% and rolled back to the 1990 level. Travel restrictions, low customer confidence and the global fight to contain COVID-19 have made 2020 the worst year in tourism history.

Between January and October 2020, the number of foreign tourists decreased by 900 million compared to the same period in 2019. This translates into a loss of \$ 935 billion in international tourism revenues, more than 10

times the 2009 loss during the global financial crisis. Such a sharp drop in tourism revenues due to the pandemic could lead to economic losses of 2 trillion dollars world GDP.

According to the existing scenarios, in 2021 there may be a 58-78% decrease in the number of international arrivals, depending on the rate of containment of the spread of the disease, the duration of travel restrictions and the dynamics of the reopening of borders. This is the largest decline in arrivals so far in a time series, eclipsing a 4% decline in 2009 due to the global economic crisis or a mild 0.4% decline due to the 2003 SARS outbreak (Figure 3).

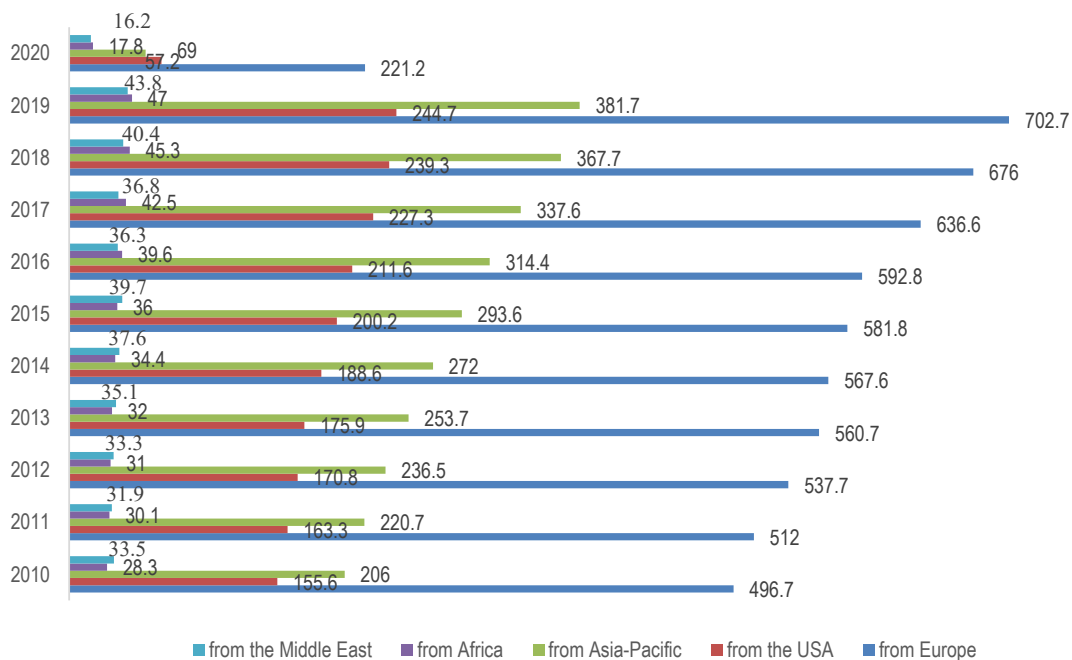
Figure 3. International tourist arrivals figures in 2020 and scenario projections for 2021 caused by the Covid-19 pandemic



Source: compiled by authors according to <https://www.unwto.org>

A decline in international travel in 2020 would mean a loss of US\$1.3 trillion in total exports, more than 11 times the loss recorded during the global economic crisis of 2009.

Figure 4. Tourist arrivals by region of origin for the period from 2010-2020, in mln.



Source: compiled by authors according to <https://www.e-unwto.org/doi/book/10.18111/9789284422456>; <http://www.e-unwto.org/doi/book/10.18111/9789284419029>; <http://www.e-unwto.org/doi/book/10.18111/9789284418145>; <https://www.e-unwto.org/doi/pdf/10.18111/wtobarometeresp.2021.19.1.1>

This collapse in international tourism resulted in an economic loss of US\$2 trillion in gross domestic product (GDP) from direct tourism, accounting for more than 2 percent of the global economic crisis. According to data on international travel spending, demand for international travel was very weak last year, but relatively strong in some major markets such as China, France and India.

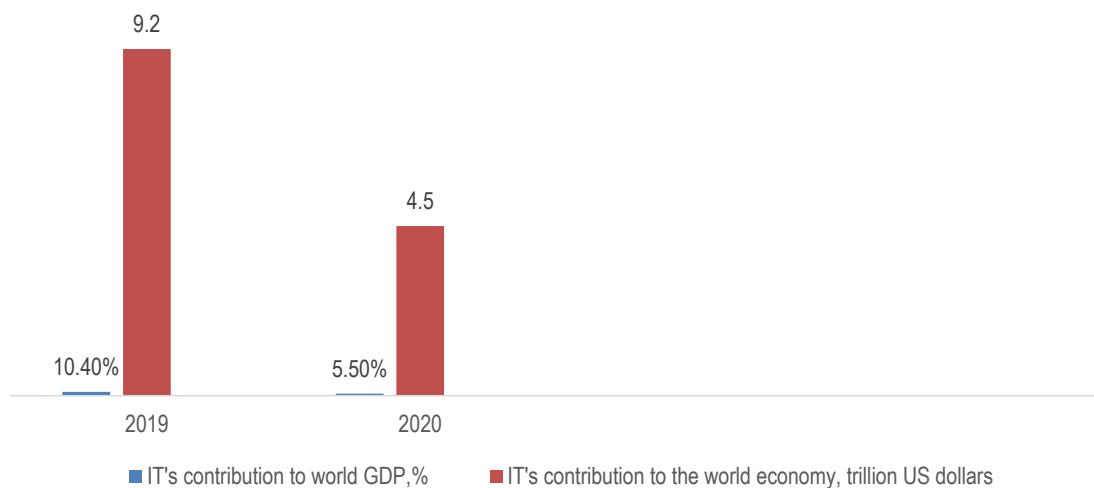
Despite the crisis period caused by the coronavirus and the fact that demand for international tourism fell, domestic tourism began to gain momentum by mid-2020 and continued to grow in several major markets, such as China, where domestic air travel returned to pre-Covid-19 levels.

But, nevertheless, despite the negative indicators of international tourism in 2020, before the pandemic, European countries had a high share in tourist travel, and in the future, they will strive to get out of this situation to positive dynamics.

According to data for the period from 1980-2019, which were made before the Covid-19 pandemic, a high tourism potential of the countries of Europe and Asia and the Pacific was predicted and, according to the potential of developing countries, the development of the tourism sector should have increased by 2030 (Figure 4).

The contribution of the tourism industry to world GDP in 2019 was 10.4%, in 2020 due to the coronavirus pandemic it decreased to 5.5%, follows from the report of the World Tourism and Travel Council (WTTC), prepared jointly with Oxford Economics (Figure 5).

Figure 5. Contribution of the tourism industry to world GDP



Source: compiled by authors according to <https://www.e-unwto.org/doi/pdf/10.18111/wtobarometeresp.2021.19.1.1>

The current trend in tourism development confirms its growing impact on the world economy as a whole, and on the economy of certain states. Tourism is viewed as a large aggregated sphere of the national economy, whose activities are aimed at meeting the specific needs that people have during recreation and travel. At the same time, tourism ensures the rise of the region's economy while forming an effective regulatory system in this area.

Despite the growing awareness of the effectiveness of public health measures and advances in testing technology and vaccine deployment, the global epidemiological situation and the emergence of new clichés have led to travel restrictions persisting and constantly being adjusted.

Research on the development of the tourism industry has shown that the sustainable development of this sector requires proactive policies such as the development of tourism infrastructure, attracting private investors, developing the regulatory framework and ensuring favorable economic working conditions, which enable the sector to play an important role in the socio-economic development of the country. It is clear that tourism can play an important role in the socio-economic development of a country.

There are significant regional differences in the application of travel restrictions. The main goals of the national economy are stability, efficiency and fairness by ensuring national output growth, high employment rates and stable pricing policies. All these indicators can be achieved through the application of instruments of macroeconomic regulation, such as fiscal, monetary and foreign economic policy.

Tourism has become a large independent sector of the national economy, and its activities meet the specific needs of people.

The tourist potential of recreational opportunities and historical and cultural heritage makes Kazakhstan unique and offers the possibility of harmonious integration into the tourism market and the intensive development

of domestic tourism. This will contribute to sustainable growth of employment and income, stimulate the development of tourism-related industries, promote the development of tourism in the national economy and increase the inflow of investments. The tourism industry cannot be imagined without proper information support and qualified specialists serving various types of tourism services. The development of even the simplest tour requires a large amount of information: knowledge of the schedules and cost of travel on international and national transport, support of the professional level of hotels and other tourist services.

Analyzing the tourism industry in Kazakhstan, we note that its development is undoubtedly affected by the slowdown in the global economy, the uncertainty associated with the UK's exit from the EU, as well as geopolitical tensions in a number of regions, which may lead to increased caution of both tourists and investors in tourist business. As a result, we can say that innovations in tourism allow us to solve a number of tasks related to both increasing the level of satisfaction of the cultural needs of the population, and creating conditions for the development of innovative forms of small business, and involving young people in innovative activities.

4. Application Functionality

The solution to the problems of tourism development at the regional level is associated with the concepts of sustainable development through the interconnected achievement of environmental, social and economic goals. For this, the author considered the system of indicators of tourism development based on the following indicators (Table 1).

Table 1. Trends in the development of the tourism industry in Kazakhstan for the period from 2010-2020

Year	the volume of tourist services provided by the places of accommodation, thousand tenge	Hotel occupancy rate, %	Employment of the population in the field of accommodation and food services, thousands of people	Export of tourism services, million dollars	Import of travel services, million dollars	Investment in the tourism industry, million tenge
2010	45245839,60	26,08	105,11	19,7	30,6	110852
2011	47836934,60	30,54	122,54	25,9	32,6	107512
2012	53486371,60	32,85	129,02	33,4	35,4	142582
2013	59714164,20	27,35	139,02	24,8	39,6	134014
2014	72401941,10	23,13	167,27	30,6	39,8	162896
2015	72597228,30	22,80	174,23	32,6	28,4	161696
2016	82853434,60	22,70	170,89	35,4	21,9	149559
2017	108359760,40	25,00	191,95	39,6	32,3	204628
2018	103948256,90	23,20	187,70	39,8	32,6	296342
2019	120527162,10	23,70	196,92	28,4	31,5	304281
2020	66860328,5	17,3	187,60*	21,9	15,6	209343

Source: compiled by authors according to <http://www.stat.gov.kz>

Let's define the factors that influence the indicator "import of tourist services", million dollars. To do this, we will use correlation-regression analysis.

Let us put forward hypotheses about the existence of a connection between the indicator under consideration and the following factors:

- the volume of tourist services provided by the places of accommodation, million tenge;
- hotel bed occupancy rate, %;
- employment of the population in the sphere of accommodation and food services, thousand people;
- investments in the tourism industry, million tenge.

Statistical data used for analysis for the period from 2010 to 2020 are presented in Table 2.

The results of the regression analysis applied to the growth rates of the initial data show that a statistically significant and reliable relationship is observed between the indicator "imports of tourism services" and the factors "employment of the population in the sphere of accommodation and catering services", "investments in the tourism industry" (Table 3).

Table 2. Dynamics of the indicators under consideration for 2010-2020

Year	Import of tourism services, million dollars	The volume of tourist services provided by the places of accommodation, million tenge	Hotel bed occupancy rate, %	Employment of the population in the sphere of accommodation and food services, thousand people	Investments in the tourism industry, million tenge
2010	30,6	45245,84	26,08	105,11	110852,0
2011	32,6	47836,93	30,54	122,54	107512,0
2012	35,4	53486,37	32,85	129,02	142582,0
2013	39,6	59714,16	27,35	139,02	134014,0
2014	39,8	72401,94	23,13	167,27	162896,0
2015	28,4	72597,23	22,80	174,23	161696,0
2016	21,9	82853,43	22,70	170,89	149559,0
2017	32,3	108359,8	25,00	191,95	204628,0
2018	32,6	103948,3	23,20	187,70	296342,0
2019	31,5	120527,2	23,70	196,92	304281,0
2020	15,6	66860,33	17,3	187,60	209343,0

Source: compiled by authors <http://www.stat.gov.kz>

Table 3. Growth rates of the indicators under consideration for 2011-2020

Year	Growth rate of imports of tourism services, %	Growth rate of the volume of tourist services rendered by accommodation places, %	Growth rate of hotel bed occupancy rate, %	Growth rate of population employment in the sphere of accommodation and food services, %	Investment growth rate in the tourism industry, %
2011	6,536	5,727	17,101	16,583	-3,013
2012	8,589	11,810	7,564	5,288	32,620
2013	11,864	11,644	-16,743	7,751	-6,009
2014	0,505	21,248	-15,430	20,321	21,551
2015	-28,643	0,270	-1,427	4,161	-0,737
2016	-22,887	14,128	-0,439	-1,917	-7,506
2017	47,489	30,785	10,132	12,324	36,821
2018	0,929	-4,071	-7,200	-2,214	44,820
2019	-3,374	15,949	2,155	4,912	2,679
2020	-50,476	-44,527	-27,004	-4,733	-31,201

Source: compiled by authors according to <http://www.stat.gov.kz>

The results of approximating the data using the least squares method are presented in Table 4.

Table 4. The results of evaluating the equation of the growth rate of imports of tourism services

R	0,819
R^2	0,671
Adjusted R^2	0,577
Fisher's test	7,138 (p – value = 0,020)
Variables	
Growth rate of imports of tourism services, % - dependent variable	
Constant	-17,588
Regression coefficients	
Growth rate of population employment in the sphere of accommodation and food services, %	1,412*
* $p < 0,1$; ** $p < 0,05$; *** $p < 0,01$	

Source: compiled and calculated by authors

From the analysis of the parameters of the multiple regression equation obtained, the following conclusions can be drawn

- A 1% increase in the employment rate of the population engaged in the accommodation and catering industry will increase the growth rate of the import value of tourism services by 1.412%.

- A 1% increase in investment in the tourism industry will increase the import value of tourism services by 0.647% on average.

Therefore, only two hypotheses could be confirmed as to whether there is a relationship between the two.

1) The volume of imports of tourism services and the employment status of the population in the accommodation and food provision sectors.

2) The volume of imports of tourism services and the volume of investment in the tourism industry.

The Republic of Kazakhstan has great climatic, historical and cultural potential and opportunities to qualitatively develop the tourism industry and increase its contribution to the national economy, and there are all kinds of opportunities to develop various forms of tourism. However, to date, the existing potentials and opportunities have not been fully exploited and the influence of tourism on the economic growth of Kazakhstan is still small and does not fully meet the challenges set in the annual message from the Head of State.

The following factors contribute to the development of inbound tourism

- Socio-economic conditions of the population
- High prices and low quality of products for tourists compared to foreign products
- Simplification of passport and visa requirements in many foreign countries

The limiting factors include the decreasing interest in leaving the population, mainly the average and the income of the population, which not everyone can afford to go abroad and have a rest (Table 5).

Table 5. Factors affecting inbound international tourism to the republic (regions)

Factors	Factor development trend	Threats to this site	Opportunities for this site
0% à 10% (Equity) 10% à 30% (Mezzanine)	Steady growth	This provision will lead to higher prices for tours and all other services, which may adversely affect the number of inbound tourists	Improving the state of this sector as a whole, improving the quality of service, increasing income from tourism, etc.
	Steadily falling	This situation can lead to a fall in all sectors of the country's economy	Increase in domestic inbound tourists between regions
Standards of living	Growth	An increase in domestic tourists and the formation of a deficit for foreign tourists	Improving the quality of service, raising the tourism infrastructure, increasing local regions, increasing budget funds
Special education level	Growth	The demand for personnel in terms of the quality of employees, the growth of wages in the tourism sector, the competition of personnel in this area	Increasing the productivity of employees, improving the quality of services working in the field of tourism
Passport and visa regime	Gain	An increase in the paperwork for obtaining a visa, which can lead to a decrease in incoming tourists to the country.	Streamlining the movement of inbound tourists, strengthening state and public security
State interest in tourism	Weakening	Inflow and growth of inadequate quality of tourism products	The growth of inbound tourists in the regions, an increase in budget revenues due to a decrease in tax rates
	Tourism finance growth	The emergence of substandard services or works	Increase of work productivity, quality of provided tourist products

Source: compiled by authors

Despite the fact that Kazakhstan is a young state that does not yet have a serious reputation in the international market as a tourist destination, the country has a unique opportunity to turn this situation in its favor - provided, of course, that this process is carried out under proper management and control. The transformation of

a young market into a powerful and profitable enterprise capable of exporting its services is quite possible - subject to strict adherence to market rules.

Kazakhstan has a fairly high tourist potential, however, no region can fully be an attractive and affordable tourist destination that is very popular with foreign tourists. Therefore, a concentrated work is needed to improve the state system of strategic management in the field of tourism of the Republic of Kazakhstan.

The main task of state regulation of tourism activities, including inbound and domestic tourism, is to create the necessary legal, economic and social conditions for the formation of sustainable development of a highly competitive tourism industry in accordance with international standards. In this regard, it is expected to diversify, modernize and expand the export of services with higher productivity, including services in the field of education, professions in the tourism sector (including environmental, medical, spa and resort services).

As tourism's contribution to economic development increases, so does the need to engage a range of stakeholders at all levels - public, private and social - to build consensus and complement capabilities and resources. Efforts must also be made to mobilize more funding from a broader range of sources, including development partners and governments. This includes development partners, public budgets, the private sector, and PPP mechanisms. A regional investment fund can also be proposed to support tourism investments that have regional scale and impact.

Regional cooperation in tourism can strengthen economic, social and cultural ties between countries, improve the region's image and make it more attractive to foreign visitors and investments. The development of a regional approach will create a broader market for the demand and supply of tourism services, and the overall goal of such cooperation will be to improve the living standards of the region's population and accelerate inclusive economic growth.

Thus, a set of measures included in the model of sustainable development of tourist destinations will create conditions for further increasing the resource potential and contribute to solving economic, social, technical, environmental, regional and demographic problems.

- Create new jobs for the residents of tourist destinations.
- Increase the quality of services provided to tourists and contribute to increasing the profits and profitability of tour operators.
- To increase the competitiveness of tourist products and tourist clusters.
- Increase the number of tourists

Conclusion

Tourism, which has become a priority sector of the national economy, has provided sustained growth in national income and employment, stimulated a number of related sectors, and significantly increased the inflow of foreign capital and investment into the national and subnational economies. The outbreak of the new coronavirus and the strict quarantine measures implemented by several countries have accelerated the transformation of the world's tourism industry. The industry has lost hundreds of billions of dollars in funding and millions of jobs. At the same time, however, digital start-ups in the field of travel technology are entering the market, new opportunities for independent travel and forms of international cooperation are emerging.

The analysis of the parameters of the multiple regression equation obtained leads to the following conclusions

1) A 1% increase in the growth rate of employment in the accommodation and food and beverage sector leads to an average increase of 1.412% in the growth rate of imports of tourism services.

2) A 1% increase in investment in the tourism sector leads to an average 0.647% increase in the growth rate of tourism services imports.

Thus, it is confirmed that there is a relationship between the following two hypotheses

1) The volume of imports of tourism services and the employment of the population in the accommodation and gastronomy sector.

2) The volume of imports of tourism services and the volume of investment in the tourism industry.

The study revealed structural weaknesses in the tourism economy (a fragmented sector composed mainly of small and medium-sized enterprises and too dependent on seasonality) and gaps in the readiness of governments and businesses to respond quickly to new challenges and changes.

Despite the massive collapse of the sector, COVID-19 proved to be an unexpected catalyst for innovation and the integration of new technologies into the sector. The acceleration of the digital agenda is one of the positive consequences of this crisis, in addition to the development of new business models that embody the objectives of

sustainable development, the introduction of ecotourism, the participation of different social groups in the sector, the evolution of demand and the rethinking of the role of safety and health.

Therefore, in order to take advantage of the available opportunities, the country must create the conditions for tourism development, including

- Support the development of tourism infrastructure and quality service systems that will enable the development of other related industries and facilitate the investment process of local SMEs.
- Provide alternative sources of income for communities dependent on tourism and increase their ability to cope with crises.
- Invest in education and vocational training
- Build productive linkages between the tourism sector and other economic sectors, especially transport and trade, through a variety of goods and services.
- Contribute to market diversification, increase product choice, resolve seasonality issues, and ensure year-round demand.
- To build a viable and sustainable transport infrastructure as a means to strengthen the link between improved transport access and tourism and to make the development of the tourism sector more stable and inclusive.
- To increase visitor interest in new experiences, including the study of cultural heritage, cultural expressions, and creative industries.
- To promote, wherever possible, the development of national and regional tourism.
- Reorganize occupational skills to diversify beyond tourism and ensure a "smart mix of sectors" in areas where tourism is the only economic activity.
- Increase the overall competitiveness of SMEs and accelerate the process of formalization of SMEs.
- Establish an early warning system for the tourism sector based on risk assessment of enterprises and tourist destinations.

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