

ASSESSMENT OF THE READINESS OF THE TOURISM INDUSTRY IN THE PAVLODAR REGION FOR THE IMPLEMENTATION OF SUSTAINABLE TOURISM

Dinara YESSIMOVA 

Toraighyrov University, Department of Geography and Tourism, Pavlodar, Republic of Kazakhstan, e-mail: dika-73@mail.ru

Alina FAURAT 

Toraighyrov University, Department of Geography and Tourism, Pavlodar, Republic of Kazakhstan, e-mail: faurat.aa@teachers.tou.edu.kz

Alexandr BELYY 

Toraighyrov University, Department of Geography and Tourism, Pavlodar, Republic of Kazakhstan, e-mail: belyi.a@teachers.tou.edu.kz

Ayana YESSIM 

L.N. Gumilyov Eurasian National University, Department of Tourism, Astana, Republic of Kazakhstan, e-mail: ayana_esimova99@mail.ru

Aleksandra NOVIKOVA 

Institute for Climate Protection, Energy and Mobility (IKEM), Berlin, Germany, e-mail: aleksandra.novikova@ikem.de

Marina OLSHANSKAYA 

AvantGarde Group, Bratislava, Slovakia, e-mail: marina@avantgarde-group.eu

Ruslan SAFAROV* 

L.N. Gumilyov Eurasian National University, Faculty of Natural Sciences, Astana, Republic of Kazakhstan, e-mail: safarov_rz@enu.kz

Bahadur BILALOV 

Azerbaijan Tourism and Management University, Tourism and Hospitality Faculty, Baku, Azerbaijan, e-mail: b.bilalov@atmu.edu.az

Silviu-Vasile BUMBAK 

Babeş-Bolyai University, Faculty of Geography, Sighetu Marmaţiei Extension, Sighetu Marmaţiei, Romania, e-mail: silviu.bumbak@ubbcluj.ro

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Abstract: Prior to the integration of sustainable development principles into the tourism industry of Pavlodar region, it is essential to assess the current situation and the readiness of the sector participants to implement them. This requires exploring international standards of sustainable tourism and adapting them for evaluation by managers, entrepreneurs, local communities and tourists. For this purpose, questionnaires were developed based on the sustainability criteria approved by the Global Sustainable Tourism Council (GSTC), including the assessment of sustainable management, social and environmental sustainability. The questionnaire results informed SWOT analysis that identified lack of awareness and motivation among industry participants to implement sustainable tourism due to additional costs, climate constraints and lack of government support. The environmentalism of the destinations and the government's investment policy were identified among the strengths.

Keywords: sustainable tourism, sustainable development, tourism industry, Pavlodar region

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INTRODUCTION

Sustainable development is a cross-cutting concept that encompasses various aspects such as environmental protection, economic growth and social well-being (Sabau, 2020). The concept of sustainable tourism is of utmost importance and is considered to be an effective way to promote global economic development and increase overall social employment. Sustainable development implemented in different sectors of the economy is crucial for achieving long-term environmental, social and economic goals. Thus, businesses seek to incorporate the key principles of sustainable development into their operations to boost competitiveness, gain recognition internationally, and improve the quality of products and services (Liao et al., 2022; Abubakr et al., 2020). The implementation of sustainable practices in tourism involves various strategies, as evidenced by a variety of studies in the field (Cheung and Li, 2019; León-Gómez et al., 2021; Garrigos-Simon et al., 2018; Sharpley, 2020; Yooetch and Nimsai, 2019). The development and operationalization

* Corresponding author

of such sustainable tourism practices and policies provide an effective response to global environmental and sustainable development challenges (Guo et al., 2019; McIntyre, 1993; Manaliyo, 2023).

Furthermore, many studies argue that the implementation of sustainable tourism contributes to the competitiveness and growth of tourism by balancing economic development with environmental sustainability in tourist destinations (Cheung and Li, 2019). Green economy and social tourism initiatives also play a role in fostering social solidarity and promoting sustainable tourism. Thus, we can say that the implementation of sustainable development principles in the tourism industry contributes to economic growth and employment reducing harm to local communities and nature, while having positive impacts on the environment, society and the economy (Manzoor et al., 2019). What is sustainable tourism? Sustainable tourism involves a holistic approach to tourism development that seeks to balance economic growth with environmental and social responsibility, while safeguarding cultural heritage and resources for future generations. The concept of sustainable tourism is deeply intertwined with the broader principles of sustainable development reflecting the nexus between the economic, environmental and social aspects of tourism practices (Streimikiene et al., 2021).

According to literature research on sustainable tourism, the concept has become of particular interest since 2005 (Garrigos-Simon et al., 2018). Many academic publications have been researching sustainable tourism and its benefits (Sharpley, 2020). Undoubtedly, the key advantage of sustainable tourism is the environmentally friendly development of tourism in line with the laws of nature, minimizing the impact and damage to the environment, and maximizing the benefits of natural sites for destination development (Cheung and Li, 2019; Bachri et al., 2024; Handiman et al., 2024).

Economic growth is another positive aspect associated with sustainable tourism (Garrigos-Simon et al., 2018; Sharpley, 2020). The relevance of sustainable tourism is determined by an increase in tourism revenues (Soh et al., 2023), as well as high local employment (Streimikiene et al., 2021). Sustainable development of tourism is critical to ensuring the long-term viability of destinations and the well-being of local communities (Khalid, 2021). In addition, sustainable tourism development management is emphasized as a means to ensure high levels of tourist satisfaction (Streimikiene et al., 2021), i.e. improving the quality of services provided by the sector's actors: tour operators, travel agents, restaurateurs, hoteliers, and administration. Thus, all sectors that used to enjoy relatively independence must integrate and share principles and operating guidelines to achieve a common goal when implementing the sustainable development principles.

The implementation of sustainable tourism faces various challenges and obstacles. These obstacles include lack of coordination among bureaucracies, limited awareness, insufficient stakeholder support, competing economic priorities and lack of political will, which results in inefficient use of resources (Midgett et al., 2019). Absence of comprehensive tourism planning is considered a major barrier to the adoption of sustainable tourism practices (Yadav et al., 2018).

Awareness and behavior of industry participants are essential in shaping sustainable tourism practices (Khalid Aqsa, 2023). Various studies prove the importance of tourism industry participants focusing on sustainable development. The importance of consumer awareness of sustainability issues is noted by Soh et al., 2023; Mohd Shariff, 2022; Gonda and Rätz, 2023 the role of lifestyle entrepreneurship in promoting sustainable practices in the industry is explored in the works by Ndegwa, 2022; Mihalič, 2022; Le et al., 2023; Ivancsóné et al., 2023.

The research by (Sabau, 2020) promotes the idea that the current poor progress in implementing the sustainable development goals is due to the limited understanding by individuals, firms, states and political parties of the values that underpin sustainable development. Thus, stakeholder engagement and strategic approaches are critical for achieving sustainable tourism goals, which highlights the importance of involving diverse actors in decision-making processes. Cooperation among all stakeholders and the integration of their actions are considered essential for the successful implementation of sustainable development measures in the tourism industry (Brătucu et al., 2017). Sustainable tourism can only be achieved through an inclusive and collaborative approach involving all stakeholders, including people with disabilities, to create solutions and opportunities (Sica et al., 2020; Makhanova et al., 2022). Achieving the value of sustainable development requires a balanced integration of all four types of values in all discussions of socio-economic activities.

According to some studies, for tourism participants, sustainable tourism is environmentally friendly (Sharpley, 2020; Mihalič, 2022; Fahmawee and Jawabreh, 2023), however, this does not render the full picture. There are several views on sustainable tourism development; according to one of them, the application of sustainable tourism approaches in practice revealed that in this case economic development is put above the well-being of local residents and nature conservation. Alternatively, some approaches are based on green growth strategies, which emphasize the need to distinguish between economic growth and the state of the environment. Our study supports the view that sustainable tourism development focuses on accelerating economic growth while enhancing the sustainability of nature. Another approach exists that focuses on social sustainability, and qualitative changes such as quality of life and well-being of residents and tourists, however, economic growth is not crucial. The approach of slowing down economic growth supports local communities, resisting excessive tourism to reduce the intensity of the impact of tourists on their habitat. A different approach is the transition to the circular economy of tourism. This approach is rather about reducing resource consumption, emissions and waste than stabilizing or slowing the growth of tourism activities or economic benefits.

Thus, there is a need to identify the level of awareness of tourism sector actors about sustainable tourism by proposing specific criteria applicable to each actor in the industry. Specific criteria should be identified to judge whether the industry has sustainable tourism attributes, and specific recommendations and measures should be provided to further embed the principles of sustainable development in the activities of entrepreneurs. Furthermore, the need for reliable measurements to assess tourism sustainability among different groups and levels of stakeholders for effective implementation of sustainable tourism principles is emphasized (Marchi et al., 2022).

The Global Sustainable Tourism Council (GSTC) plays a critical role in promoting sustainable practices in the tourism industry. The Council defined criteria for sustainable development to ensure sustainable development in various areas (Bozhinova and Georgieva, 2023; Wu et al., 2022). The GSTC criteria, which include effective sustainable management, maximizing economic benefits to the host community and minimizing negative impacts, have been used as a basis for assessing the sustainability of tourist destinations (Modica et al., 2018; Huda et al., 2022). In addition, the GSTC criteria have been integrated into the assessment of sustainable practices in the hotel industry in accordance with the sustainability indicators and sustainability framework of the European Union (Alipour et al., 2019). The Global Sustainable Tourism Council criteria are widely used around the world. Huda et al., 2022 have assessed the sustainability of a tourism destination using the GSTC criteria and demonstrating the practical application of the criteria in assessing sustainability. Kruczek and Szromek, 2020 reiterated the importance of the GSTC criteria in determining the value proposition of tourism enterprise business models, particularly in addressing the problem of overtourism. Moreover, Bricker et al., 2022 provided a framework for sustainable tourism development in and around national parks in accordance with the principles and criteria set by the GSTC.

The research was conducted in Pavlodar region located in the north-east of the Republic of Kazakhstan (Figure 1). The region is one of the leaders in the country's mining and commodity complex, while its historical heritage is also remarkable.



Figure 1. Pavlodar region on the map of Kazakhstan

However, a study of current economic trends in the tourism sector of Pavlodar region confirms that the tourism industry as a whole is at the initial stage of development (Yessim et al., 2023), and it is subject to the influence of production sector (Azhayev et al., 2020; Seidaliyeva et al., 2024) and climate features (Pashkov et al., 2020).

The study of current economic trends in the tourism industry of Pavlodar region reveals the need to introduce the principles of sustainable development. The development of national criteria and adaptation of international criteria to local conditions will help to ensure sustainable development of the tourism industry in the region. This is particularly relevant given the environmental impact of the industrial and climatic characteristics of Pavlodar region on tourism. Adapting international criteria of sustainable development to local conditions will promote the emergence of more effective and realistic strategies for tourism development in Pavlodar region. It will, in turn, help to balance the economic, social and environmental aspects of tourism development in Pavlodar region. It is also important to engage tourism industry actors in the discussion and definition of sustainable development principles as their opinion will be helpful in addressing the specifics and needs of the local market, which contributes to more successful implementation of sustainable practices in tourism.

Thus, the research should define the concept of sustainable tourism (1), analyze the existing indicators for measuring tourism sustainability (2), and identify, based on a survey, the status of awareness of the basics of sustainable tourism development among the different groups involved in the tourism sector (3).

MATERIALS AND METHODS

Study area

The research was conducted in Pavlodar region (Figure 1). The analysis of tourist and leisure resources of Pavlodar region revealed that ecological tourism is the backbone of tourism in the region. The natural tourist attractions of Pavlodar region include Bayanaul State National Natural Park; Kyzyltau National Wildlife Refuge; National Natural Forest Reserve Yertis Ormany; Paleontological Natural Monument of National Importance Goose Flight; and National Natural Reserve Irtysh River Floodplain (Alkeyev et al., 2014). According to the assessment of tourist and leisure resources and based on the data from literature, we selected representative study sites among the resources of the administrative districts of the region:

- with the most attractive natural landscapes - Bayanaul District (Bayanaul State National Natural Park);
- moderately attractive but highly rated (according to our survey) – Shcherbaky District (National Natural Forest Reserve Yertis Ormany, Shaldai branch).

The surveys on the development and implementation of sustainable tourism identified pilot businesses in the tourism sector: Birch Grove Recreation Center, Yelkonys Recreation Center, Karagai Alany Guest House (Yertis Ormany), and Mixtour tour operator, which will be involved in further research activities.

Sustainable tourism criteria

Sustainable tourism development criteria have been defined based on the Sustainable Development Goals (SDGs), international experience, as well as materials of the Global Sustainable Tourism Council. The GSTC criteria are based on years of previous work and experience around the world and incorporate numerous sustainable tourism recommendations and standards from all continents and contain various indicators. They reflect certification standards, indicators, criteria and best practices from different cultural and geopolitical contexts worldwide in tourism and other sectors where applicable. Potential indicators have been tested for relevance and practicality, as well as for their applicability to a wide range of destinations within Pavlodar region. According to the materials provided by the Global Sustainable Tourism Council, the criteria should be divided according to the research object. Thus, this study has identified the following research objects: tourist destinations, accommodation service providers, and other actors of the tourism industry. For each of these facilities, we have adapted objectives/indicators that feature interdisciplinary, holistic and integrative approach:

- demonstration of sustainable management of a destination, accommodation enterprise, tour operator;
- maximizing social and economic benefits for local communities and minimizing negative impacts;
- maximizing benefits for local communities, visitors and cultural heritage sites while minimizing impact;
- maximizing environmental benefits and minimizing negative impacts (<https://www.gstcouncil.org/>).

Criteria (indicators) considered in this study are as follows (adapted by us based on the GSTC system):

1) sustainable management: management structure and framework, stakeholder participation, workload and change management. The destination applies a system to monitor and respond to socioeconomic, cultural and environmental issues and impacts caused by tourism activities. Stakeholder participation: the destination informs touristic businesses about sustainability issues and encourages them to adopt relevant practices. A monitoring system is implemented to assess visitor satisfaction with the quality and sustainability of tourism. Promotional and awareness raising materials about the destination accurately reflect tourism products, services and sustainability statements;

2) social sustainability: social well-being and its impact. Main indicators of the section: the destination enables the active participation of all stakeholders in the process of development and implementation of the principles of sustainable tourism. Tourism planning and development respects the rights and needs of all users, including people with disabilities. We also address the carbon footprint of the tourism sector as part of our research.

Criteria related to economic, environmental and cultural sustainability are the subjects of future research.

Survey and interview procedures

Based on the above criteria, questionnaires were compiled to assess the current state of the tourism industry in Pavlodar region, awareness of the principles of sustainable tourism, sustainable development goals and obstacles to its achievement. The questionnaires are presented in two versions: extended version and short version adapted for entrepreneurs. Questionnaires have been developed for the administration of tourist destination, tourism organizers, restaurants, hotels, environmental organizations, local residents, and tourists (Figure 2). The main data collection consisted of anonymous surveys via links to Google forms on questionnaires. Questionnaires were sent to state and local institutions of the Pavlodar region, groups on social networks, and among tourism workers. Conversations and consultations took place with organizations working in the field of sustainable development in Kazakhstan, such as UNDP: projects in the field of biodiversity, the Association of Environmental Organizations of Kazakhstan, JSC National Company Kazakh Tourism. Sustainable development experts shared their experience of working with tourist destinations (conducting surveys, processing results, etc.), and materials from previous studies in protected areas (methodological recommendations on recreational load standards, eco-standards for eco-tourism).

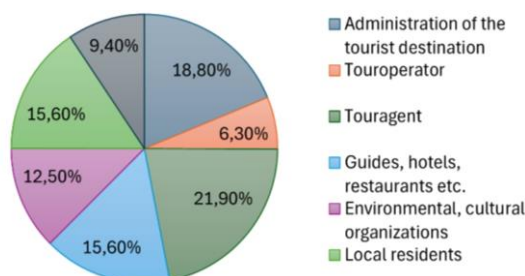


Figure 2. Respondents and focus groups participating in the survey

The interviewed participants included those directly involved in and influencing tourism development in the destination under study, such as administrations of protected areas, private tourism and non-tourism entrepreneurs, as well as relevant public, environmental, and cultural organizations. The interviewees were selected based on a preliminary matching of relevant respondents using materials provided by the Tourism and Entrepreneurship Department of Pavlodar city, the administration of the natural park, the reserve, business directories and internet searches. Further, as the initial interviewing

progressed, the range of participants was expanded. Meetings on sustainable tourism development were held with local businesses interested in the research project. Stakeholders with relevant and innovative ideas in the context of the nature park were also involved. During meetings that were held at the businesses/institutions the research team of the project discussed the activities of the entrepreneurs and their ideas regarding the prospects for tourism development in the protected natural area. The composition of the group of interviewees made it possible to obtain information from different types of participants, which are considered to be the most relevant to the research topic.

Table 1. Interviewees in the case study

Interviewee	Representatives of organizations and enterprises
1-3	Bayanaul district governor's office- 3 representatives
4	State Institution Department of Physical Culture, Sports and Tourism of Bayanaul District
5	Yelkonys Recreation Center
6	Birch Grove Recreation center
7	Karagai Alany Guest House (Yertis Ormany)
8	Mixtour tour operator
9-10	Travel agents – 2 representatives
11-17	Private entrepreneurs: IP <i>Abiyev</i> , IP <i>Azmadan</i> , IP <i>Aityshev Nursultan</i> , LLP <i>Akzhanyim</i> , IP <i>Zinnat</i> , IP <i>Kashkeyeva</i> , IP <i>Naurazbayeva</i>

Table 2. Examples of survey questions grouped according to the criteria of sustainable management of a tourist destination

Criterion	Examples of focus group questions
Focus group: administration of the tourist destination	
Are there specialized departments or staff responsible for a coordinated approach to sustainable tourism (Aa1)	Does the organization take into account the principles of sustainable tourism (social, economic, cultural and environmental management)? How?
Is the tourism destination guided by a developed strategy and development plan based on the principles of sustainability? Was this plan developed in collaboration with cultural and environmental organizations (Aa2)	Does the organization have a tourism development strategy or plan? What is included in this plan (if there is a published version, please attach a link)? What stakeholders have concurred this strategy?
Is there a monitoring system in place to trace the promotion of sustainable tourism (Aa3)	How is the achievement of the goals specified in the tourism development plan/strategy monitored? How often are progress reports generated and where are they published?
Focus group: administration of the tourist destination, stakeholders (guides, hotels, restaurants, tourists, local residents, etc.)	
Does the destination promote the idea of environmental certification for enterprises in the tourism industry (Ab4)	Are tourism-related enterprises informed about sustainability issues (media, meetings, direct contacts, etc.)? If yes, list the activities?
Focus group: local residents	
Does the destination ensure public participation in sustainable planning and management (Ab5)	Is the public involved in the planning/management of the destination? How? Provide examples of actions taken in response to resident feedback.
Focus group: tourists	
Does the destination receive feedback from tourists on their satisfaction with the quality of services and their participation in planning and management (Ab6)?	Are there surveys or feedback channels for visitors (customers)? How are they arranged? Provide examples of actions taken in response to resident feedback.
Focus group: administration, tourists, local communities, environmental, cultural organizations	
Do tourist information materials reflect the features of the destination, as well as their environmental and environmental activities (Ab7)	Please provide links to advertising and tourism information materials about the destination (tourist enterprise), if available. Were these materials produced with input from local communities and environmental and cultural organizations?
Focus group: administration, public and stakeholders	
Does the destination have a system for monitoring recreational load, as well as managing tourists (Ac8)	Is there a plan that accounts for seasonality? Are there operational mechanisms in place for the enterprise to address seasonality? Which ones?
Focus group: administration, local residents	
Does the destination take into account environmental policy guidelines for conducting environmental impact assessments, including those affecting local residents (Ac9)	Are there guidelines for conducting environmental, economic and sociocultural impact assessments, land use, design, construction and demolition? Which ones? Is the local community taken into account in the development of tourism in their territory?
Focus group: administration, public and stakeholders	
Is the destination guided by a strategy to reduce its carbon footprint to mitigate climate change? Does the destination communicate this impact to the public and stakeholders? (Ac10)	Does the destination (tourism business) identify the risks and opportunities associated with climate change? Is information on projected climate change and related risks made available to residents, businesses and visitors?
Focus group: administration	
Does the destination have risk management (Ac11)	Does the destination have a risk reduction, crisis management and emergency response plan, including natural disasters, terrorism, health, resource depletion and other risks?

The interviews and questionnaire responses provided insight into how stakeholders are involved in tourism development, and what views they have on sustainable tourism. The interview style was structured but open to include new topics in an unstructured manner. The topics of the interviews and discussions at the tourism development meetings revolved around the businesses' perceptions of the principles of sustainable tourism development in destinations as an

alternative to the strategies currently in use. We discussed what the respondents perceived as something that should be maintained (e.g. nature or socio-cultural context) and what should be developed, and how the actors see the fulfillment of their own interests in connection with this context. Thus, the initial interviews focused on exploring the personal perspectives and approaches of the participants with further refinement on the identified concepts and approaches of sustainable tourism development. A total of 32 respondents participated in the survey.

RESULTS AND DISCUSSION

Questionnaire analysis

This study used criteria for sustainable tourism development, which relate to the sustainable management (A) and social well-being (B) of a tourist destination. In this section, the majority questions were addressed to the administration of tourist destinations, Bayanaul and Shcherbakty districts. As part of the survey under the sustainable management section (A), the following questions were considered (Table 2). In the first subsection (Aa), respondents were asked questions about the availability of established management structure, documented procedures and monitoring of the implementation of sustainable tourism. Section B represents the criteria that address the comfort of the destination for tourists and, especially, the local community (Table 3). The extent to which the local population is involved in the development of sustainable tourism, how the rights of tourists and the community are taken into account, how the public safety is ensured and how the accessibility of tourist facilities at the destination is ensured. The data obtained after the survey and interviews were processed by content analysis. Interviews and survey results were subjected to thematic analysis, taking into account the internal process of data collection, data analysis. The analysis revealed certain patterns and perspectives in the understanding of the current state of tourism development and the respondents' awareness of the principles of sustainable tourism and the willingness to implement these principles in their activities.

Table 3. Examples of survey questions grouped according to the criteria of social well-being

Criterion	Examples of focus group questions
Focus group: administration, tourists, local communities, tourism enterprises	
Does the destination practice collaborative support among tourists, local community and the destination in the field of sustainable tourism development (Bb1)	Is support for local community and sustainability initiatives by local tourism businesses encouraged and facilitated? How?
Does the destination comply with and practice international human rights standards (Bb2)	Does the destination (tourist enterprise) support international human rights standards? How are they applied at the enterprise?
Focus group: administration, local residents	
Are the rights of the local communities respected at the tourist destination (Bb3)	How are the rights of communities and indigenous peoples respected? Are public consultations organized, is resettlement compensation available?
Focus group: administration, tourists, tourism enterprises	
Does the destination have well-functioning security services that meet the required standards (Bb4)	Does the destination have a system for monitoring, prevention, public alert and response to crime, security and health threats that meets the needs of both visitors and residents? How is it implemented?
Focus group: administration, tourists	
Are the facilities and areas in the destination accessible to persons with disabilities, what methods are used to address these issues while preserving the integrity of cultural, historical, natural sites? (Bb5)	Are areas, facilities and services, including those of natural or cultural significance, publicly accessible, including to persons with disabilities and those who, due to other special needs, require special conditions? How is information on such accessibility provided?

Interview results

Criterion Aa1. Tourism departments function within the administration of special protected natural territories and their activities are combined with the implementation of environmental education programs. This means that tourism development is aimed at organizing environmental education of the population, while secondary focus is on tourism development. The departments mainly deal with cultural and environmental issues, while social and economic aspects receive less attention. All economic aspects such as investments and subsidies are controlled by the government. Activities related to tourism development in protected areas are characterized by transparency both in terms of processes and contracting. Unlike public structures, private entrepreneurs in tourism often lack a specialized team responsible for sustainable tourism development. Their approach to tourism activities is limited, but they have business knowledge that traditionally focuses on profit maximization.

Criterion Aa2. The destination has its own development plan based on the Pavlodar Oblast Tourism Development Plan as well as the Concept of Tourism Development in the Republic of Kazakhstan. The development strategy does include evaluation of tourism assets and considers socio-economic, cultural and environmental issues and risks. However, the destination lacks specific sustainable development goals and objectives. The local community is not involved in the plan development, moreover, the plan is not available on the destination website. Small tourism enterprises do not have a clear development plan; traditional business-oriented activities, including proper market analysis and marketing, are rarely in focus.

Criterion Aa3. Achievements related to tourism development in the destination are reflected in quarterly and annual reports. Some destinations include the following parameters: recreation area attendance, accommodation records, sanitation and hygiene work, landscape design, road infrastructure, tourist information center and safety of holidaymakers, communal property, investment projects, and environmental issues. The activities are displayed very extensively in the news feed on the destination's website. However, no final report is available on the website.

Criterion Ab4. Destination activities largely focus on providing environmental education and encouraging tourism activity, but they fail to adequately address the need for partnerships, collaboration and support for local entrepreneurs and tourism workers. Business sustainability remains an underrepresented practice, as local ventures tend to focus on social sustainability, which emphasizes ensuring their own social well-being and the well-being of others through the provision of natural experiences. Government agencies and organizations also see it as their mission to make nature accessible and bring knowledge and values to the community. Smaller conservation organizations and actors generally do not own or have full control over land resources. For some, their limited access to natural resources creates difficulties in ensuring economic sustainability.

Criterion Ab5. All respondents note that they maintain regular interactions with the local population: they involve residents in work processes, discuss issues related to the life of the local community, etc. However, there is no data confirming public participation in destination planning and management. Local residents themselves believe that their interests are not adequately addressed, and they are not invited to become suppliers of goods or services.

Criterion Ab6. Entrepreneurs build robust interaction with tourists. All comments and suggestions are mainly related to improving the quality of services to increase profits rather than sustainable tourism. The official website of the destination has a Feedback section, but the site itself is not popular among visitors.

Criterion Ab7. The destination provides information on environmental sustainability and conservation of local natural resources mainly by means of information stands. Promotional and awareness-raising materials about the destination are drafted with the participation of environmental and cultural organizations, but they do not always fully reflect the destination's values and approaches to sustainable development. These materials usually convey information about the rules of behavior in protected areas and provide an introduction to local communities and the principles of respect for nature.

Criterion Ac8, criterion Ac9. Destinations that represent special protected areas, in general, respect the pressures and the state of the environment. They follow the requirements for environmental impact assessment, economic and social culture, land use, design, construction and demolition. However, the responses lack information on climate change risks. The negative aspect noted by business representatives is underdeveloped infrastructure, outdated accommodation infrastructure, transport, etc., which prevents the introduction of resource-saving technologies without retrofits.

Small entities apply entrepreneurial approaches aimed at promoting environmental sustainability and protecting local natural resources. Some businesses support nature rehabilitation, e.g. landscaping, limiting interventions to give visitors better access to nature. Some small private businesses and voluntary organizations recognize that visitor activities can lead to changes and impacts on nature. However, in turn, they do not support restricting the flow of people to protect certain intact areas of the site. For the administration of specially protected areas, nature is an important resource for education and enlightenment that needs to be studied and considered, but at the same time left untouched. At the same time, for some tourists, nature must be accessible while understanding that they can have minimal impact on the environment. Entrepreneurs see nature as an infrastructure for various types of activities, which helps improve the quality of life and the services offered.

Criterion Ac10, criterion Bb4. Destinations raise awareness among residents and tourists about eco-tourism by providing information on natural resources, sustainability, wildfires and more. However, no information is available on other aspects of sustainable tourism, such as social sustainability and sustainable management. Similarly, destinations fail to provide information on the environmental impact of tourism, including the consumption of electricity, heat and other resources, i.e. carbon footprint. Tourists lack relevant insights on this as well.

Criterion Ac11. Inspection personnel is available to ensure the regime of special protection of the territory, the plan of engaging forces and means to extinguish fires in the national park located on the lands of Bayanaul district has been approved (one of the answers). Thus, a unified crisis management system operated by a specialized governmental unit is available in the destinations.

Criterion Bb1, Bb3. The rights of indigenous residents are respected in accordance with the legislation of the Republic of Kazakhstan. Round tables are regularly held with the local residents, and their feedback and suggestions are taken into account.

Criterion Bb2. In terms of social well-being, the destinations generally meet the requirements of international standards in the field of human rights, labor code, etc. These requirements are fixed in legislation, labor code and are complied with by all actors of the tourism industry.

Criterion Bb5. Natural tourist sites are accessible, tourist routes, trails are posted at the information centers of the destinations. However, they are not designed for individuals with disabilities. The offices of some businesses are equipped with ramps.

Thus, we see that special protected areas tend to adopt an environmental stance, while businesses focus on economic benefits, although both sides agree that reducing the adverse impact on the environment can bring greater benefits. In general, the respondents' views on sustainable tourism are presented as environmentally friendly activities, without considering economic, social, cultural sustainability. The representatives of the tourism industry are not eager or motivated to explore and implement the principles of sustainable tourism in their activities, as this would entail additional costs, limited economic benefits due to climatic features, as well as the lack of governmental leverage and support.

Our data confirms many studies based on surveying the tourism sector players. The study by Miller et al., 2010 shows low levels of awareness of the impact of the tourism industry and the respective response options. Greater awareness is generally observed regarding tangible impacts (e.g., litter); awareness is lower in relation to intangible impacts (e.g., climate change). In addition, a sense of powerlessness and reluctance to make significant changes in current tourist behavior was noted Miller et al., 2010. A survey of tourism office executives and professionals in a study by Nicholls, 2021 revealed limited and controversial understanding of the key underlying characteristics of sustainability among these two critical stakeholder groups,

both of which are crucial to tourism planning, development, marketing and management. Other studies have also highlighted the lack of awareness of the principles of sustainable tourism (Timur and Getz, 2008; Gurung and Seeland, 2011).

Based on the data obtained, a SWOT analysis was conducted on the state of the tourism industry and its readiness to implement the principles of sustainable tourism in Pavlodar region.

Table 4. SWOT-analysis of the state of tourism in Pavlodar region for the purposes of implementation of the sustainable tourism framework in the destination

<p>Strengths: Tourism development in Pavlodar region is in its early stages, which implies less obstacles to the introduction of new practices and strategies. The government's strong investment policy, including that in tourism, can help attract resources and develop infrastructure for sustainable tourism. Special protected natural areas show environmental stance and commitment to conserve natural resources, which contributes to environmental sustainability.</p>	<p>Opportunities: Development of partnerships among destinations, businesses and local communities can contribute to the wider adoption of sustainable practices and better interaction in the tourism industry. Training and awareness-raising of the tourism industry actors on the principles of sustainable development can underpin a change in their approaches to more sustainable operations.</p>
<p>Weaknesses: Lack of due attention to the social and economic aspects of tourism development in special protected areas may lead to insufficient accounting basis for the implementation of sustainable practices. Lack of due consideration of the need to establish partnerships with local entrepreneurs and tourism employees may hinder the development of sustainable tourism. The ambiguous attitude of entrepreneurs to restricting the flow of tourists to protect pristine areas of the territory may cause challenges to the conservation of natural resources in the long term. Underdeveloped infrastructure and outdated means of accommodation and transportation prevent the introduction of resource- and energy-saving technologies without retrofitting.</p>	<p>Threats: Limited access to natural resources for some local environmental organizations and actors may pose challenges to achieving economic sustainability and implementing sustainable practices. Lack of information about the risks associated with climate change can reduce a destination's readiness to adapt to possible environmental changes. Limited understanding and motivation of the tourism industry actors to implement sustainable practices may become an obstacle to the development of sustainable tourism in the region. The lack of government leverage and support can reduce the motivation of entrepreneurs and administration to implement sustainable practices.</p>

CONCLUSIONS

The survey and interviews among the actors of the tourism industry of Pavlodar region revealed that, in general, the participants are aware of the need to undertake environmental protection activities and consider the interests of communities and tourists. However, there is no defined structure and strategy that could be applied by all actors, except for the state requirements and standards. There is no monitoring system for the implementation of activities, feedback from the public, tourists and local residents. Lack of transparency in the implementation of tourism development tasks, scarce communication to stakeholders about the work done by the destination and planned activities. This issue can be resolved by expanding the use of internet resources, social media, regular and frequent publication of reports on the activities of the destination. No mechanisms are in place to encourage the introduction of sustainable tourism principles, certification and popularization among the residents. Implementing monetary and non-monetary incentives for organizations complying with tourism development standards will help promote the sustainability of the industry.

In general, the tourism sector representatives are not willing or motivated to explore as well as implement the sustainable tourism framework in their activities. The following arrangements can encourage greater interest: educational programs and workshops for the development of the tourism industry based on the principles and benefits of tourism; development of a plan to encourage and support businesses in the implementation of sustainable practices in tourism; and building networks for experience sharing and knowledge transfer among tourism industry players regarding the practical aspects of tourism. The SWOT analysis of the tourism industry in Pavlodar region suggests the following key findings:

The tourism industry in the region is in its nascent stage, which provides excellent opportunities to introduce new practices and strategies without significant obstacles. Strong government investment policies, including those related to tourism, provide a framework for resource mobilization and infrastructure development that can contribute to the sustainable development of the industry. Lack of adequate attention to the social and economic aspects of tourism development in protected areas may disrupt the base for the implementation of sustainable practices. This points to the need to better analyze and consider these aspects when developing the tourism development strategy. Fostering partnerships among destinations, entrepreneurs and local communities, as well as educating tourism industry stakeholders on the principles of sustainable development, can drive successful implementation of sustainable practices and raise awareness in this area. Poor infrastructure and outdated accommodation and transportation facilities can hinder the adoption of resource- and energy-efficient technologies. Therefore, infrastructure needs to be upgraded to facilitate sustainable tourism development.

The findings suggest the need for continued efforts to translate the vast amount of research on sustainable tourism into terms and formats more comprehensible to industry professionals, as well as for unlocking opportunities for local organizations to take the lead in bringing together various stakeholders to place a greater emphasis on sustainability in their

communities. Thus, the next objective of our research will be to educate stakeholders and present scientific evidence in a more practical form, thereby enhancing consumers' motivation for sustainable tourism services and changing their behaviors towards more sustainable ones. The research on the development of an action plan to improve the sustainable management of tourism activities will offer tools for decision-makers, researchers and enterprises involved in tourism in a specific destination. Recommendations for the development of tourism in sustainable forms based on local contexts and the interests of local communities will be elaborated in the dimension of socio-economic sustainability. Within the framework of economic sustainability, a range of measures will be proposed to mitigate the demand seasonality, to extend the tourist season, to distribute tourist flows, and to attract graduated specialists to the industry. The contribution of the tourism sector of Pavlodar region to climate change through the assessment of carbon footprint will be used to develop measures for its reduction to mitigate the impact of the tourism sector on the environment, as well as to obtain additional benefits for entrepreneurs from the introduction of energy- and resource-saving approaches and technologies.

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