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**ДОКЛАДЫ**

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## **ANALYSIS OF THE DEVELOPMENT OF THE SKI TOURISM**

**Abstract.** Tourism as an aggregated sector of economic development is a socially oriented innovation complex of directions that ensures the replenishment of the state budget, the growth of employment and self-employment of the population, the creation of conditions for the restoration of efficiency, maintenance and strengthening of people's health in the maximum environmental safety regime.

The tourism industry is one of the largest and fastest growing industries in the world. The global tourism industry forms 10% of world GDP and creates every 11th working position. Even in times of crisis, tourism gives an annual increase of about 4-5%.

According to forecasts of the World Tourism Organization, by 2030, international tourism will grow by 3.3% per year and will reach 1.8 billion tourists.

Ski tourism is a very important segment of today's highly profitable domestic and foreign tourism market. The corresponding data indicate that about 2,000 ski resorts operating in about 80 countries around the world have about 6 million housing bed spaces for those who are engaged in winter sports.

The article analyzed the distribution of ski resorts, ski visits at developed ski resorts, the number of international skiers who entered, also it contains the comparative analysis of the level of development of the ski industry in Central Asia, as well as an overview of the development of ski resorts.

**Keywords:** tourism, ski resort, ski resorts, analysis, distribution.

### **Introduction**

As a rule, cross-border winter tourism is practiced at major ski resorts located in tour destinations that have long-standing tradition in winter sports, and small ski resorts depend mainly on domestic demand. Quite a lot of mature ski tours are concentrated in Western Europe, the United States and Japan. Competitive development of the ski resort and its effective management is associated with high costs, both in terms of investment and maintenance.

Since the practice of ski tourism and the establishment of ski resorts began to develop around the world, quite a lot of time has passed. Soon this sport in such a developed form, which implies the presence of well-equipped bases for training, will turn into a whole century. So alpine skiing tourism is already a familiar, traditional form of recreation and sports, which for some regions of the world and Europe has become something of a national product. The national product, which contributes to the improvement of living standards in some areas, refreshes the situation, attracts investors and tourists, enhances local prestige, and makes a significant jet of additional financial flows into national economies. Of course, ski tourism itself and love for it are not capitals that could be seen with the naked eye against the background of the state budget of any country. However, this type of recreation and sports is indirectly capable of influencing state and local prestige, attracting investments and giving new impetus to the development of certain administrative and geographical areas. So, for example, it was the development of the field of ski tourism that led to the emergence and development of such industrial and commercial industry as a service of ski tourism in a number of countries. And this is really an industry in the full sense of the word, not just a few tourist bases or factories for the production of special equipment.

### General part

This article analyzed the distribution of ski resorts and ski-lifts around the world with an emphasis on the regions of Central Asia, including the following countries: Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, Pakistan, Iran, Georgia, Armenia and Azerbaijan[1].

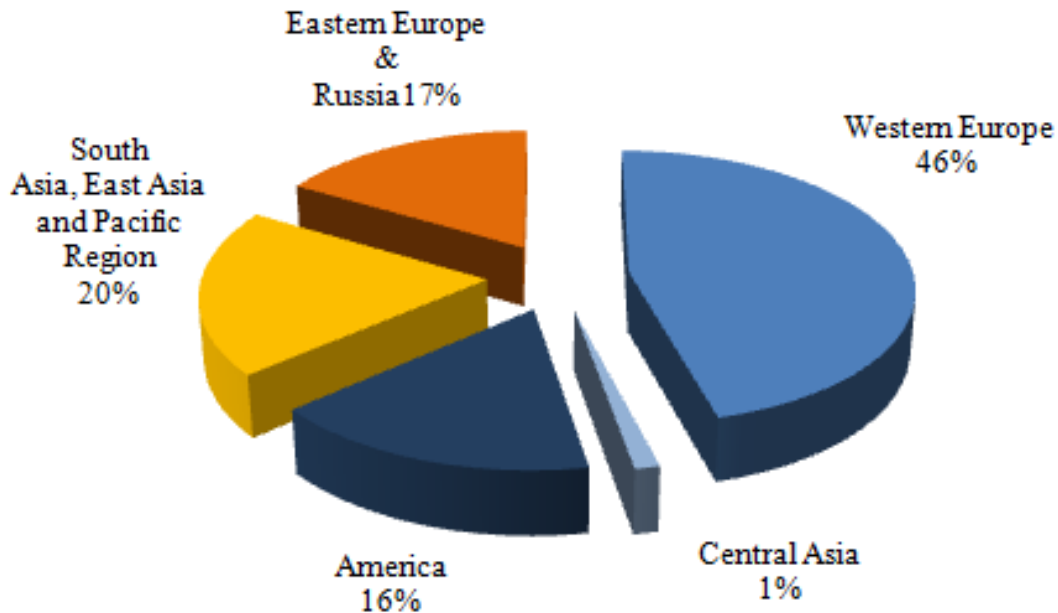


Figure 1 - Analysis of the distribution of ski resorts by region

Table 1 - Comparative analysis of the level of development of the ski industry in the world

Country	Number of zones for skiing	Number of zones with 4 ski-lifts	Number of large ski resorts (> 1 million skiers)	Number of ski-lifts	Number of skis visits	Skiers ski-lift	Local participation rate (% of population)	Share of foreigners	Foreign visitors
Austria	254	199	12	3,028	52,382,000	17,299	36.0%	66.0%	1.62
Canada	288	73	1	922	18,987,600	20,594	15.0%	14.3%	0.17
Finland	76	30	0	374	2,240,000	5,989	24.0%	17.0%	0.11
France	325	233	14	3,685	55,539,200	15,072	19.0%	28.0%	0.21
Germany	510	82	0	1,827	11,460,000	6,273	14.0%	10.0%	0.05
Italy	349	216	4	2,127	23,460,000	11,030	8.0%	15.0%	0.08
Japan	547	280	0	2,422	28,996,589	11,972	9.0%	3.0%	0.13
Sweden	228	69	1	820	6,430,800	7,842	20.0%	8.0%	0.10
Switzerland	240	102	7	1,774	27,276,371	15,376	37.0%	50.0%	1.64
USA	481	354	7	2,970	57,745,399	19,443	4.3%	5.6%	0.06

Analysis of the distribution of ski resorts around the world showed the following [2]:

- By the number of ski-lifts, the ski industry is concentrated in the region of Western Europe, followed by America, South Asia, East Asia and the Pacific Region, Eastern Europe and Russia. The largest number of ski-lifts is concentrated in the Alps (almost 40% of the total number of lifts around the world), while France and Austria have the largest numbers (25% of the total number of ski-lifts around the world);

- South Asia, East Asia and the Pacific Region have a significant share in the total number of ski resorts (20%), while Japan has the largest number of ski-lifts (65% of all ski lifts in the region), followed by China. China has a significant number of ski resorts, but most of them are small areas for skiing, on which there are only a couple of ski-lifts, and which cannot be considered as ski resorts;

- Central Asia has an inappropriate share in the total number of ski resorts / ski-lifts, with the largest number of ski-lifts concentrated in Iran, Kyrgyzstan and Kazakhstan;

The countries with the largest number of ski-lifts in the world are France, Austria, USA, Japan, Italy, Germany and Switzerland;

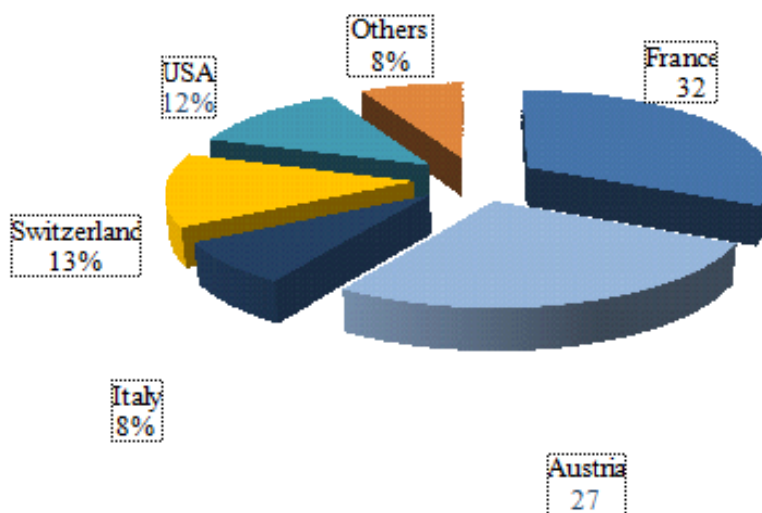


Figure 2 Distribution of major ski resorts (over 1 million skiers)

Large ski resorts (with more than 1 million ski visits) are located in France, Austria, USA, Switzerland and Italy;

- Major ski resorts (TOP 10 leading ski resorts by number of ski visits per day) are located in the Alpine region, mainly in France and Austria (La Plagne (France), SkiWelt Wilder Kaiser (Austria), Les Arcs (France), Courchevel-Meribel-Mottaret (France), Kitzbühel (Austria), Ischgl (Austria), Saalbach (Austria), Alped'Huez (France), Val Thorens (France)) and one ski resort in Canada (Whistler Blackcomb) [3];

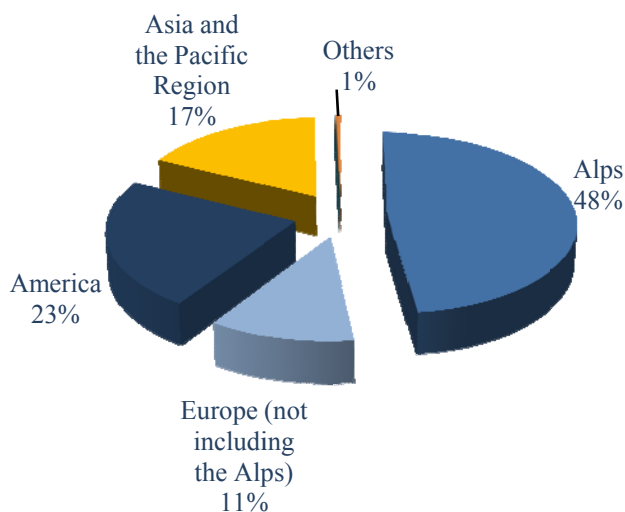


Figure 3 The structure of skiers visits (on average over the past 10 years)

- The leading region in the world, in terms of ski visits per day, is the Alpine region (Austria, France, Switzerland, Italy), which accounts for almost half of the total ski visits;
- An analysis of the number of international skiers who have entered shows that Austria, France, Switzerland and Italy (the Alpine region) attract the largest number of foreign skiers. However, the majority of foreign skiers are tourists coming from other European countries;
- There are data on the number of international skiers who arrived in the United States, but most of them came from Canada, and only a few percent are foreign visitors. Most of the foreign skiers arriving in North America are skiers whose visit is determined by the status of the ski resort - they visit famous ski resorts such as Aspen, Vale, Whistler, etc. Similarly, international skiers arriving in Canada mostly come from the United States, and only a small percentage are foreign visitors;
- Japanese ski resorts account for up to 5% of international skiers, with most of them coming from China, South Korea and Australia. South Korean ski resorts have a higher percentage of international skiers compared to Japanese ski resorts, with most of them coming from China;

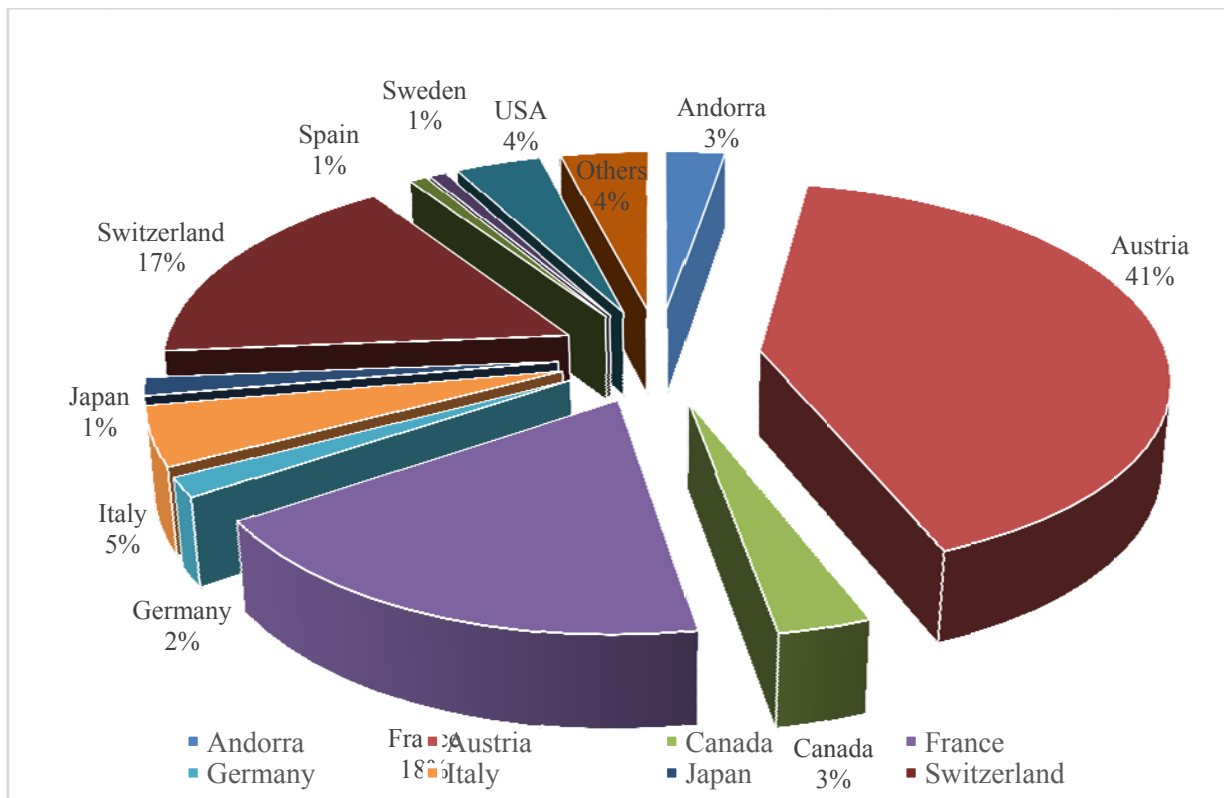


Figure 4- Estimated number of foreign skiers entered

The majority of international departing skiers are in European countries, with the largest number of departing skiers in the UK and Germany. Despite the fact that most of the international skiers choose places for skiing in other European countries, which are mainly concentrated in the Alps, there are also those who choose new developing ski resorts in Central and Eastern Europe [4].



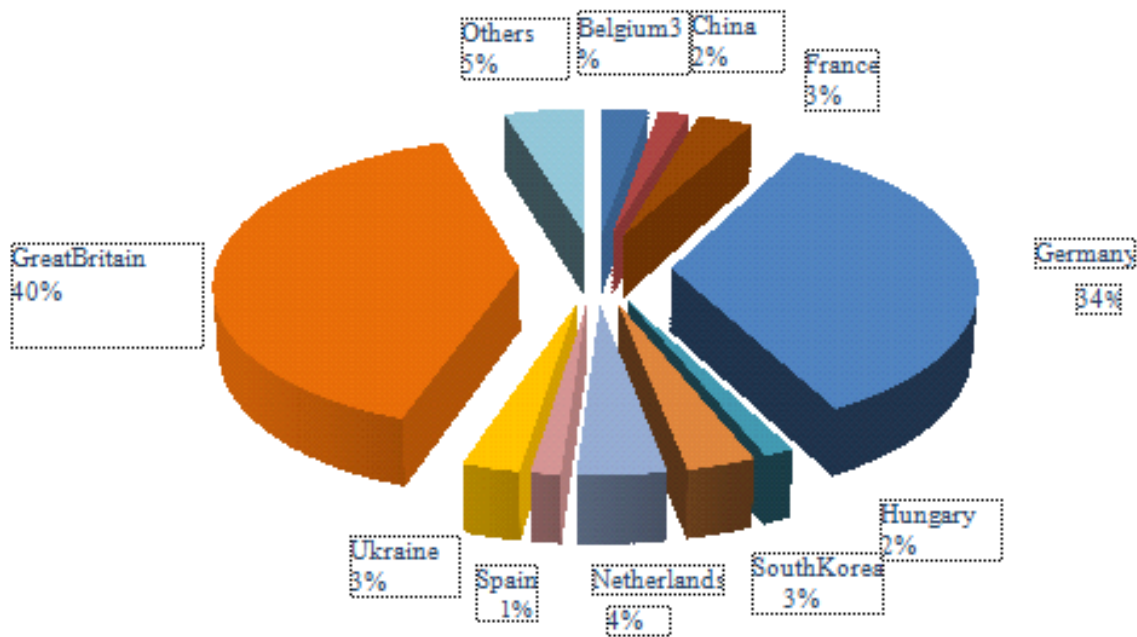


Figure 5- Estimate of the number of departed foreign skiers

Only a few percent of the total number of European international skiers choose the USA / Canada for skiing. Also, a small number of European international skiers choose ski resorts in Asia; In addition, international skiers from Asia (primarily from South Korea and China) choose other Asian countries for skiing (Japan, South Korea). At the same time, there are a small number of international high-income skiers from Asia who travel to famous ski resorts;

Table 2 - Comparative analysis of the level of development of the ski industry in Central Asia

Country	Number of zones for skiing	Number of zones with 4 ski-lifts	Number of large ski resorts (> 1 million skiers)	Number of ski-lifts	Number of skisits	Skiers / ski-lift	Local participation rate (% of population)	The proportion of foreign skiers
Armenia	3	1	0	7	50 000	7 143	2.0%	2.0%
Azerbaijan	2	1	0	7	50 000	7 143	0.5%	0.0%
Georgia	5	2	0	14	100 000	7 143	2.0%	10.0%
India	15	1	0	22	200 000	9 091	0.1%	1.0%
Iran	19	4	0	51	500 000	9 804	1.0%	1.0%
Kyrgyzstan	16	1	0	24	100 000	4 167	1.0%	20.0%
Pakistan	2	0	0	8	80 000	10 000	0.1%	5.0%
Tajikistan	3	0	0	2	20 000	10 000	0.2%	0.0%
Turkey	25	6	0	102	1 000 000	9 804	1.0%	15.0%
Ukraine	41	8	0	98	800 000	8 163	2.0%	5.0%
Uzbekistan	2	1	0	8	80 000	10 000	0.2%	15.0%

A comparative analysis of the level of development of the ski industry in Central Asia (including Turkey and India) shows that Ukraine has the most developed ski industry, including 8 ski resorts with more than 4 ski-lifts, followed by Turkey and Iran. The skiing zones in Kyrgyzstan (one of the ski resorts has more than 4 ski-lifts) have a relatively high proportion of foreign skiers, due to the large number of foreign skiers coming from Kazakhstan and Uzbekistan due to the competitive prices offered [5];

In Central Asia, there are no major ski resorts with more than 1 million ski visits. The largest number of ski visits is in Turkey, followed by Ukraine and Iran. However, due to lack of data and consistent methodology, the exact number of ski visits cannot be counted in quantitative terms;

It should be noted that the Central Asian region is a developing market for the development of the ski industry. Due to the limited supply and growth of the economies of the countries of Central Asia, developers and operators in the ski industry are increasingly considering commercial opportunities in the Central Asian region.

The following criteria were analyzed for the following criteria [6]:

- Sizeandscale
- Profitability
- Methodologyofdevelopment
- in order to identify the most successful ski resorts around the world.
- Sizeandscale

The size and scale of the ski resorts is determined according to the following criteria:

- Capacity of the ski arena (capacity of the ski-lifts uphill, skiers contemporary capacity - SCC, length of the slope, surface of the ski slope)
- Generating capacity of the base area (number of sleeping accommodations in public and private hotels)

The criteria considered are some of the success factors, but should be considered relative to other key factors. We found that both "large" and "small" ski resorts can be profitable and unprofitable. Thus, it is impossible to determine whether a ski resort is "successful", based on its size and scale. However, it should be noted that the balance of size and scale with other factors is important.

Profitabilityratio

Due to the wide range of commercial activities carried out by different ski resorts around the world and which are not consolidated at the ski resort level, unless they belong to the same legal entity, it is not possible to compare the financial results of different ski resorts. Comparative analysis should be carried out by analyzing companies operating in the same field of activity. The resort business includes a number of business / profit centers, the most important of which are [7]:

- Activities related to skiing (primarily the sale of tickets for ski-lifts)
- Provision of housing (ownership / management of hotels and other accommodation facilities)
- Real estate (ownership, rent, sale of real estate)
- Other resort businesses include riding schools, retail, rental, transportation, food and beverages, etc.

When analyzing the financial data of various ski resorts, special attention was paid to activities related to skiing, including the following indicators:

- Income from activities related to skiing, as a function of the number of ski visits
- EBITDA indicator related to skiing (operating income from skiing - operating expenses from skiing)
- Actual ticket price (skiing revenues divided by total number of ski visits)

Development methodology, time needed for development and business modelмодель

- These criteria are closely related, given their strong influence on each other.
- There is no single formula to indicate which development methodology and business model should be used. This formula should be developed specifically, because historically it happened that the most successful ski resorts have adapted their development strategy for a specific market, conditions and context. Even within the same national market, one can observe various methodologies and business models for the successful development of ski resorts.

With regard to development and business models, a general distinction can be made between the development model of the Alpine ski resorts and the North American development model [8].

The development model of the Alpine ski resorts is characterized as follows:

- Large Austrian and Swiss ski resorts are characterized by a gradual development - organic growth, where skiing started, and some of the most famous ski resorts developed from traditional ski resorts such as St. Moritz, Zermatt, Wengen, Verbier (Switzerland) and Kitzbuehel Lech, St. Anton (Austria);

- For the French model of development of ski resorts, expansionary and functional development was characteristic, which led to their rapid growth and becoming the largest ski resorts in the world. On the other hand, one of the controversial issues concerning the French model is the architecture of the ski resorts, which is considered functional but unattractive [9].

- Ski resorts in Austria have a long history of their development and have played an important role in the development of skiing. Skiing is one of the most popular sports in Austria, deeply rooted in the culture and lifestyle of society, which is one of the most distinctive characteristics of ski resorts in Austria. The share of skiers (as a percentage of the total population) is 36%, which is one of the highest participation rates in the world. This fact is reflected in the development model of the Austrian ski resorts, which are characterized by the organic growth of villages and cities in the mountainous areas and the further development of the ski infrastructure and additional housing / real estate for tourists. Thus, it can be said that whole villages and cities are considered ski resorts in Austria, and there are not so many examples of specially built ski resorts [10]. The ski business in Austria has been developing very slowly over more than 100 years. Ski runs and ski-lifts are in most cases located on private lands and communities or municipalities of small villages very often take part in the ownership structure of the ski infrastructure. The proposal for the placement of skiers is very fragmented by various types of accommodation facilities and belongs to a number of individuals, most of whom are represented by families that own and operate a business [11].

- A strong influence on the development of ski and other winter sports in the Alpine region was supported by the government in the form of large investments in the infrastructure of ski resorts - roads, water supply systems, sewage systems, and also provision of incentives for private investors. Most ski-lift operators belong to local communities, and reinvest profits into lift upgrades and snowmaking.

North America is the second largest ski area in the world, including the USA (primarily the states of Colorado, Utah, New York, Vermont, California, New Hampshire, Montana, etc.) and Canada (primarily Quebec Province, British Columbia and Alberta). There are many world-famous ski resorts in North America such as Sun Valley, Sundance, Lake Tahoe, Jackson Hole Hunter Mountain (where many movies were shot), Aspen, Vail and Beaver Creek (for the "rich and famous"), Whistler Blackcomb, Salt Lake City, Lake Placid (ski resorts that hosted the Olympic Games) [12].

The North American model of development of ski resorts is characterized as follows [13]:

- Improving the concept of building ski resorts, which involves the construction of specialized resort towns in order to create bright places for gathering guests and locals. The concept takes into account the principle of the optimal ratio of "warm beds" against "cold beds" and new management models (condo hotels / condominiums), designed to maintain interest in the ski resort, and at the same time optimize the financial model of the ski resort project;

- New real estate development models introduced due to the need for sustainable financial management and risk management;

- Unlike in Europe, most ski resorts are owned by private entrepreneurs / companies, which is the reason why bankruptcies of ski resorts in North America occur more often than in Europe;

- Improvement of standards for planning ski resorts and development to ensure a balance between the offer of accommodation and the capacity for skiing, optimal circulation of vehicles and visitors, diversification of the offer, optimization of the development of the resort center - with parking / without cars, maximizing the ski-in / ski out principle (easy access to the ski-lifts), small buildings, etc.

## **Conclusion**

Based on the above information, it can be concluded that, despite the fact that traditional ski resorts were developed for the first time in Europe, the planning and development of ski resorts continued to evolve in North America in connection with the development of integrated planning and design of ski resorts.

In conclusion, it should be noted that the Central Asian region is a developing market in terms of the development of the ski industry. Due to the limited supply and growth of the economies of the countries of Central Asia, developers and operators in the ski industry are increasingly considering commercial opportunities in the Central Asian region.

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### ТАУ ШАҢҒЫ ТУРИЗМІНІҢ ДАМУЫН ТАЛДАУ

**Аннотация.** Туризм, экономикалық дамудың біріктірілген саласы ретінде барынша жоғары экологиялық қауіпсіздік тәртібінде мемлекеттік бюджеттің толтырылуын, халықтың жұмыспен қамтылуының өсуін және жұмыспен қамтылуын, адамдардың жұмысқа қабілеттілігін қалпына келтіру, қолдау мен нығайту үшін жағдайдың жасалуын қамтамасыз ететін, бағыттардың әлеуметтік бағдарлы инновациялық кешенінен тұрады.

Туризм саласы әлемде ірі әрі серпінді түрде дамып келе жатқан салалардың бірі. Туризмнің әлемдік индустриясы әлемдік ЖІӨ-нің 10% қалыптастырып, әрбір 11 жұмыс орнын құрады. Тіпті дағдарыс кезінде де туризм жыл сайын қатарынан 4-5%-ға өсіп отырады.

Дүниежүзілік туризм ұйымының болжамы бойынша, 2030 жылға қарай, халықаралық туризм жылына 3,3%-ға өсіп, 1,8 млрд туристке жетеді. Тау шаңғы туризмі бүгінгі күні туризмнің кірісі жоғарышкі және сыртқы нарығының аса маңызды сегменін құрайды. Тиісті деректер бойынша, қысқы спорт түрімен айналысатындар үшін әлемнің 80-ге жуық елінде жұмыс жасайтын шамамен 2000 тау шаңғы курортында 6 миллион төсек-орын бар.

Мақалада тау шаңғы курортын үлестіру талданған болатын, дамыған тау шаңғы курорттарына шаңғымен барғандағы санына талдау, келуші халықаралық шаңғышылар санына талдау, Орта Азия елдеріндегі тау шаңғы индустриясының даму деңгейіне салыстырмалы талдау, сондай-ақ тау шаңғы курорттарының дамуына шолу жүргізілді.

**Түйін сөздер:** туризм, тау-шаңғы туризмі, тау-шаңғы шипажайы, талдау, бөлу

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### АНАЛИЗ РАЗВИТИЯ ГОРНОЛЫЖНОГО ТУРИЗМА

**Аннотация.** Туризм как агрегированная отрасль экономического развития представляет собой социально ориентированный инновационный комплекс направлений, обеспечивающий в режиме максимальной экологической безопасности пополнение государственного бюджета, рост занятости и само занятости населения, создание условий для восстановления работоспособности, поддержания и укрепления здоровья людей.

Туристская отрасль является одной из крупнейших и динамично развивающихся отраслей в мире. Мировая индустрия туризма формирует 10% мирового ВВП и создает каждое 11 рабочее место. Даже в период кризисов туризм дает ежегодный прирост порядка 4-5%.

По прогнозам Всемирной туристской организации, к 2030 году международный туризм вырастет на 3,3% в год и достигнет 1,8 млрд. туристов.

Горнолыжный туризм составляет весьма важный сегмент сегодняшнего высоко прибыльного внутреннего и внешнего рынка туризма. Соответствующие данные говорят о том, что около 2000 горнолыжных курортов, функционирующих в примерно 80 странах мира, располагают порядка 6 миллионами койко-мест для тех, кто занимается зимними видами спорта.

В статье были проанализированы распределение горнолыжных курортов, проведен анализ лыжных посещений на развитых горнолыжных курортах, анализ количества въехавших международных лыжников, сравнительный анализ уровня развития горнолыжной индустрии в странах Центральной Азии, а также обзор развития горнолыжных курортов.

**Ключевые слова:** туризм, горнолыжный туризм, горнолыжные курорты, анализ, распределение.

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