

Czech University of Life Sciences Prague

Faculty of Economics and Management

Department of Languages



Bachelor Thesis

Tourism in the Almaty region in Kazakhstan

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BACHELOR THESIS ASSIGNMENT

Angelina Mishkoy

Business Administration

Thesis title

Tourism in the Almaty region in Kazakhstan

Objectives of thesis

The aim of this bachelor thesis is to analyze the development of tourism in the city of Almaty and its surroundings. Tourist places and attractions of this city will be characterised and analysed in the work. The main objective is to identify the strengths, weaknesses, opportunities and threats of tourism in the selected region. A sub-objective is to investigate the factors that influence tourists' decisions to visit Almaty and its surroundings.

Methodology

In the theoretical part, the method of secondary data collection, literature study, i.e. current literature related to the history of tourism in Kazakhstan, as well as types, services, goals and directions of tourism, will be used. The theoretical part will also cover this topic with encyclopedic data and social networks.

In the analytical part, an analysis will be carried out in order to evaluate tourism in Almaty. Further, an analysis of tourism statistics for the last ten years will be conducted, showing the development of the situation in the tourism industry. Physical and geographical characteristics of the region, tourism infrastructure, products offered to tourists in Almaty, hotel services, restaurants, and information centres will be analyzed. The method of document analysis, SWOT analysis, description and comparison will be used.

The proposed extent of the thesis

30-40 pages

Keywords

Almaty, Kazakhstan, regional development, tourism industry

Recommended information sources

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Declaration

I declare that I have worked on my bachelor thesis titled "Tourism in the Almaty region in Kazakhstan" by myself and I have used only the sources mentioned at the end of the thesis. As the author of the bachelor thesis, I declare that the thesis does not break any copyrights.

In Prague on 15.03.2024

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Tourism in the Almaty region in Kazakhstan

Abstract

This bachelor's thesis is devoted to analyzing the level of tourism in the Almaty region and the city of Almaty in Kazakhstan. The purpose of the thesis is to analyze the development of tourism in the city of Almaty and its surroundings, to identify the strengths and weaknesses, opportunities, and threats of tourism in the selected region.

The literature search carried out for this study focused on theoretical knowledge, the study of scientific sources and works of the tourism industry in general. In the practical part of the study, these sources are used to describe the tourism industry in Kazakhstan and the Almaty region. This information is then analyzed as part of a detailed SWOT analysis, which leads to proposals for improvement and future development of the tourism sector in the region.

Keywords: Almaty, Kazakhstan, regional development, tourism industry

Cestovní ruch v oblasti Almaty v Kazachstánu

Abstrakt

Tato bakalářská práce je věnována analýze úrovně cestovního ruchu v regionu Almaty a městě Almaty v Kazachstánu. Cílem bakalářská práce je analyzovat vývoj cestovního ruchu ve městě Almaty a jeho okolí, identifikovat silné a slabé stránky, příležitosti a hrozby cestovního ruchu ve vybraném regionu.

Literární rešerše provedená pro tuto studii byla zaměřena na teoretické poznatky, studium vědeckých pramenů a prací z cestovního ruchu obecně. V analytické části studie jsou tyto zdroje použity k popisu cestovního ruchu v Kazachstánu a regionu Almaty. Tyto informace jsou následně analyzovány v rámci podrobné SWOT analýzy, která vede k návrhům na zlepšení a budoucí rozvoj sektoru cestovního ruchu v regionu.

Klíčová slova: Almaty, cestovní ruch, Kazachstán, regionální rozvoj

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1 Introduction

The relevance of the chosen topic is that the city of Almaty is attractive from the point of view of business, professional, commercial and cultural, and educational tourism. Almaty, often referred to as the southern capital and the cultural center of Kazakhstan, boasts significant competitive advantages and untapped potential for tourism development. Despite the growth of other Kazakhstan cities, Almaty maintains its unique position. In July 1998, the Law on the special status of the city of Almaty was adopted, defining it as the scientific, cultural, historical, financial, and industrial center of Kazakhstan. Successful urban tourism requires a well-defined strategy and innovative approaches, aimed at knowledgeable and modern travelers. It is extremely important to find a balance between modernity and the preservation of local identity. The problem of the city of Almaty is the lack of development of its image as an international tourist center.

The purpose of this research is to analyze the development of tourism in the Almaty region. A detailed study of tourist attractions, cultural attractions, and the entire tourist infrastructure will be conducted. The main objective is to identify the strengths, weaknesses, opportunities, and threats that exist in the tourism sector of the Almaty Region. Additionally, this research aims to clarify the factors that influence the decision of tourists to visit Almaty and its surroundings.

2 Objectives and Methodology

2.1 Objectives

The aim of this bachelor thesis is to analyze the development of tourism in the city of Almaty and its surroundings. Tourist places and attractions of this city will be characterized and analyzed in the work. The main objective is to identify the strengths, weaknesses, opportunities, and threats of tourism in the selected region. A sub-objective is to investigate the factors that influence tourists' decisions to visit Almaty and its surroundings.

2.2 Methodology

The theoretical part uses the method of collecting secondary data, studying literature, i.e. modern literature related to the history of tourism in Kazakhstan, as well as types, services, goals and directions of tourism. The theoretical part also covers this topic with the help of encyclopedic data and social networks.

In the analytical part, an analysis is carried out to assess tourism in Almaty. Next, an analysis of tourism statistics over the past ten years will be carried out, showing the development of the situation in the tourism industry. The physical and geographical characteristics of the region, tourism infrastructure, products offered to tourists in Almaty, hotel services, restaurants, information centers are analyzed. The method of document analysis, SWOT analysis, description and comparison is used.

3 Theoretical Part

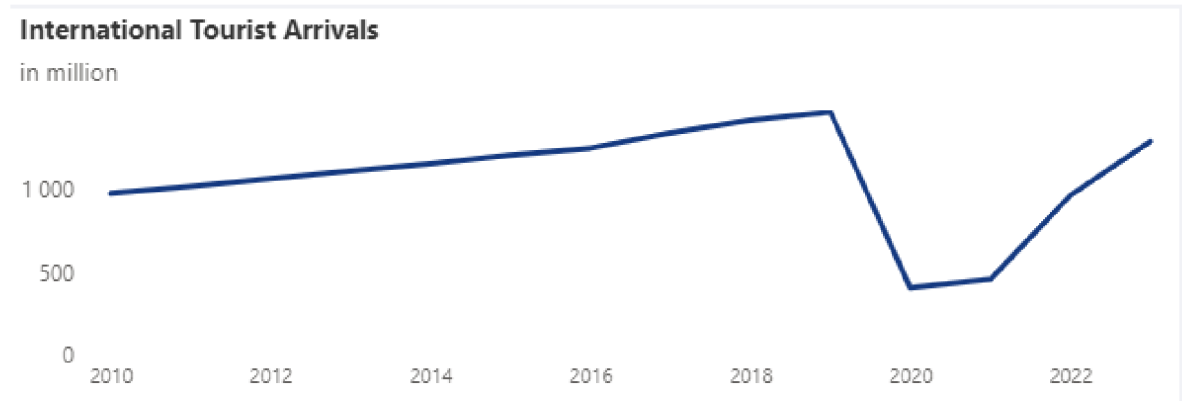
3.1 Characteristics of the tourism industry

Tourism is one of the world's largest industries and one of the fastest growing economic sectors over the past six decades. (ABALAKOV & PANKEEVA, 2011) The tourism industry plays a huge role in the development of the world, and it is positively and negatively correlated with the economic growth of the global economy, in addition, it is one of the most promising and dynamic types of business and is gaining increasing popularity. (STREIMIKIENE, et al., 2020)

Tourism directly depends on many factors that can both positively and negatively affect the industry as a whole. The development and demand for tourism have a great impact on the global economy in the long and short term. The global tourism industry is influenced by such factors as: culture, peace, security, developed infrastructure of the world, visa opportunities, improvement of nature, attitude of people, number of tourists, quarantine, world population, education, income level, price level for various goods in the world, different languages, cost of hotel accommodation, etc. (KHAN, et al., 2020)

Figure 1, presented by the World Tourism Organization, clearly shows that the number of international tourist arrivals to all countries in millions has been increasing rapidly every year for 9 years (from 2010 to 2019), However, it fell sharply in 2020, this is due to the global COVID-19 pandemic and global self-isolation. (UNWTO, 2023)

Figure 1 World International Tourist Arrivals



Source: (UNWTO, 2023)

The COVID-19 pandemic has hit the tourism industry hard. While some industries are able to adapt to digital platforms and continue to fight for survival, some industries, such as tourism, are facing unprecedented setbacks due to travel restrictions and social distancing. Tourism is an industry that cannot survive without the mobility of tourists. (DEEP SHARMA, et al., 2021) It is suffering the most due to travel bans (both external and internal) and border closures. (KARABULUT, et al., 2020)

The tourism industry has been seen as the main cause and vector of the novel coronavirus that sparked the COVID-19 outbreak. The industry's unsustainable practices have not helped the cause of sustainable living around the world. The pandemic has brought the global tourism industry to a near standstill. All industry stakeholders must work together to make the industry resilient enough to cope with the crisis. (DEEP SHARMA, et al., 2021) The pandemic had a strong impact on all sectors of the economy and areas of people's lives in general, but gradually things began to return to normal from 2021, including the reopening of the tourism industry. (UNWTO, 2023)

Modern tourism is influenced by many factors and has a strong influence on politics, economic expansion, cultural change, inspires new technologies, shapes ideas of good taste and is a central component of the modern world. (ZUELOW, 2016)

3.2 Definition of tourism

First of all, the word "tourist" first appeared in the early 19th century in English and was used to describe people who travel for their own pleasure or to expand their cultural horizons, later the term "tourism" was introduced. (BIRZHAKOV, 2007)

Tourism is a complex phenomenon, so there is no single definition of this term. John Tribe, in his book *Philosophical Issues in Tourism*, identifies several different meanings of tourism among different authors: Hermann von Schullern views it as “the sum of economic transactions which involve the entry, residence and movement of foreigners outside a country.”, city or region,” when Jafari understands it as “the study of a person away from his or her usual environment.” (TRIBE, 2009)

Moreover, Tourism is the process of people moving from one place to another for entertainment and time. This plays a huge role in the development of the country. Thanks to tourism, the demand for various goods increases, and different cultures of the world are homogenized into one culture. (KHAN, et al., 2020)

The United Nations World Tourism Organization (UNWTO) defines the word tourism as: “a social, cultural and economic phenomenon that entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.” (UNWTO, 2008)

Stanislav Erdavletov, a famous Kazakh geographer and the founder of the tourism scientific discipline in the country, believes that tourism is “a set of phenomena and relationships that arise in the process of travel and temporary stay of citizens outside their permanent place of residence, if this stay does not turn into a profession for the sake of earning money.”. (ERDAVLETOV, 2010)

3.3 History of tourism

3.3.1 Tourism in Antiquity

The history of tourism or the history of travel are complementary concepts and go back to ancient times. Throughout its long history, humanity has strived for global knowledge and discoveries in order to develop trade, conquer and develop new lands, search for resources and new transport routes. Discoverers and Great Travelers discovered new lands, peoples and civilizations; it was they who paved the way for the emergence and formation of tourism. (ERDAVLETOV, 2010)

In ancient history, wealthy aristocrats had the permission and opportunity to travel for recreational purposes or to diversify their leisure time, when ordinary travelers and

sailors set out to explore new cultures, languages and discover new lands and trade routes. The works of travelers were of great value and contained unique maps and descriptions of lands that contributed to knowledge and obtaining information previously unknown to anyone. (ERDAVLETOV, 2010)

The first evidence of actual organized travel dates back to the 8th century, when the king of France established friendly relations with the caliph of Palestine. French nobles began to go on excursions to Asia Minor more often; they were supplied with guidebooks with brief information about the route and distances between cities. Later, information about accommodations, prices, climate, attractions and monuments of regions and countries began to appear in guidebooks. (ERDAVLETOV, 2010)

Ancient tourism was most developed in Ancient Greece and Ancient Rome; these states were among the first to attach great importance to the economic side of tourist travel. In Ancient Greece, hotels already existed, and some provided food; it was also there that balneology and medical tourism began to emerge. In addition to these states, active researchers were Persians, Arabs, Chinese and many others. A completely different level of travel arose after the opening of sea routes. The conquest of the sea became a huge event in the history of mankind and the history of tourism in general, because people began to make expeditions more often and even began to bring trophies and souvenirs from their trips. (ERDAVLETOV, 2010)

3.3.2 Tourism in medieval times

In the Middle Ages, the main motivations for moving people were wars and pilgrimages. With the beginning of the development of cities and factories, the rich class of the population gradually began to afford leisure and travel, unlike the working class. Officials, landowners, clergy, students and university professors traveled frequently due to wars and pilgrimages. Trips were infrequent, targeted or specialized. (LICKORISH & JENKINS, 2007)

In the Middle Ages, an organized network of inns for travelers, located along the roads, began to form. However, the pace of tourism development decreased significantly; the active travelers in this era were pilgrims. Along with them, there were more and more trips of a political and diplomatic nature. (ERDAVLETOV, 2010)

Industrial growth began to significantly influence the way people lived, the expansion of the merchant and professional classes, reforms in education stimulated interest in other countries and the emergence of travel as a new educational force. Young men of good families began to be encouraged to go abroad, to study and become acquainted with the customs of other nations, and to enrich their country by the advantages of travel. (LICKORISH & JENKINS, 2007)

In the Middle Ages, sea travel and expeditions continued to gain popularity, especially during the era of great geographical discoveries. Travel on foot and travel by cart also continue to exist and develop; travelers are increasingly beginning to use road guides and hand-drawn maps with illustrations. (ERDAVLETOV, 2010)

3.3.3 Modern tourism

The era of railroads, namely steam trains and steamships, changed the possibility and accessibility of travel. The expansion of transport capacity and traffic flows has greatly influenced the development of hotel and resort infrastructure. (LICKORISH & JENKINS, 2007) The emergence of travel agencies has also become an important part of the tourism industry and has begun to gain popularity. (ERDAVLETOV, 2010)

An important event in the formation of modern tourism is the popularization of mass tourism in the mid-20th century, which occurred due to the technological and industrial revolutions. Revolutions led to an increase in the welfare and income of the population, people began to learn more and more about the variety of attractions of different countries through television and have the opportunity to travel. (LICKORISH & JENKINS, 2007)

Car ownership and the development of rail and air services have led to mobility of people and the ability to develop the tourism sector. Developments in transport routes and mass tourism have brought with them the development of resorts, the introduction of travel agencies, tour operators with new marketing techniques, organized tours, travel packages, posters, brochures and a trend towards cheap and safe travel. (LICKORISH & JENKINS, 2007)

Throughout the history of tourism, great preference has been given to medical tourism, but in the 20th century, a significant part of the medical resorts lost their homogeneous medical character and began to turn into multifunctional tourist areas. People

are beginning to become interested in beaches, sports and active tourism, resort towns and holiday towns are emerging. The rapid development of domestic and international tourism entails the involvement of government authorities to regulate this industry and introduce the first foreign documents. (ERDAVLETOV, 2010)

With the development of society, an increasing number of the world's population is involved in the field of tourism, and tourism is increasingly taking on a modern form. (ERDAVLETOV, 2010) By the beginning of the 21st century, tourism ends its formation and takes on a modern form, however, digitalization has significantly changed the travel and tourism industry, turning it into a “smart” sector, that is, an innovative and technologically advanced sector at the present time. (PENCARELLI, 2019)

3.4 Types of tourism

Tourism is a large industry that is divided into many different types along different lines and can be divided and influenced by the purpose and motivation of people. Some researchers distinguish 3 main types of tourism:

- *Domestic tourism* - involves residents of any country traveling only within the country. It is economically important, reduces the outflow of money from that country, affects the balance of payments and helps the economy of the country, so it is encouraged by the government.
- *Outbound tourism* - involves residents of any country traveling to another country.
- *Inbound tourism* - involves non-residents traveling within a country.

(HOLLOWAY & HUMPHREY, 2022)

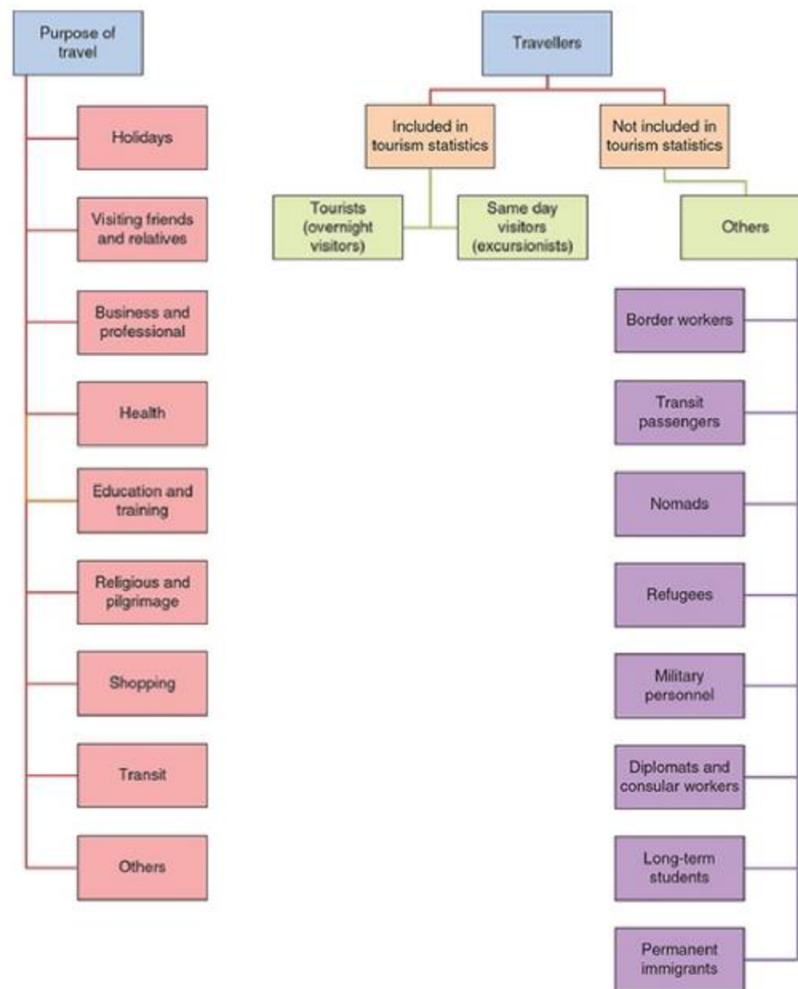
When other researchers distinguish the following categories:

- Types of tourism based on source area and destination: Domestic and International tourism.
- Types of tourism based on the number of participants: Individual and Group tourism.
- Types of tourism based on organizational criteria: Organized, Unorganized and Semi-organized tourism.

(TUREAC & ANCA, 2008)

In addition to the above-mentioned types of tourism, any trip has certain motives, so the purpose of tourism can often indicate a certain type of tourism chosen by a person or a group of people. (KURALBAYEV, et al., 2016) Figure 2 shows the classification of tourism presented by the United Nations World Tourism Organization:

Figure 2 Classifying travelers



Source: (HOLLOWAY & HUMPHREY, 2022)

It is important to recognize the main purpose of the trip or motivation of the tourist as each category will have its own unique set of characteristics. (HOLLOWAY & HUMPHREY, 2022) Different researchers identify a different number of types of tourism based on the purpose of the trip, the author of this paper has reviewed the main and most commonly encountered types of tourism which are as follows:

- *Vacation or leisure tourism*

Is the most common type of tourism in the modern world. A tourist vacation can consist of either a period of complete relaxation in a very quiet area, with few activities, or a period of active vacation in which daily activities are accompanied by relaxation and entertainment. This type of tourism has a strong vacation season, especially relevant during the vacation, and vacation periods. (TUREAC & ANCA, 2008)

- *Tourism and recreation for the purpose of health care and treatment (Medical and recreational tourism)*

It is one of the oldest types of tourism and is aimed at restoring and maintaining health. Economic and social conditions of modern life expose people to a large amount of stress, which is also popular to get rid of at resorts and sanatoriums. Air pollution in big cities, sedentary lifestyle and many other things contribute to the demand for this type of tourism. Tourists of this direction prefer vacation in spas, swimming pools, thermal and mineral springs, sea water, etc. (TUREAC & ANCA, 2008)

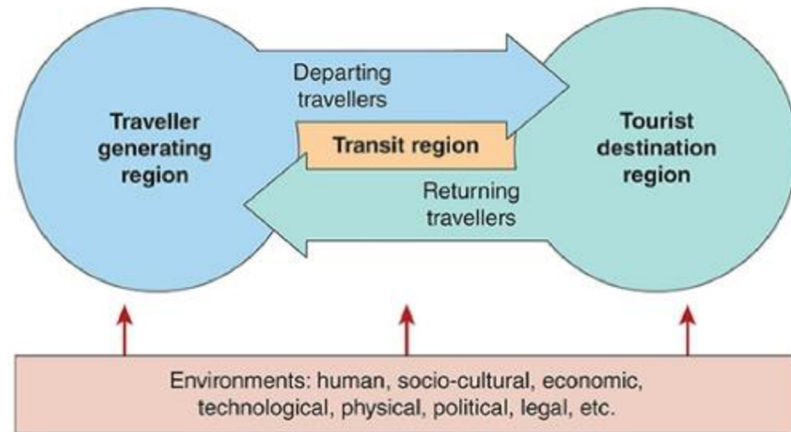
- *Excursion (informative) tourism or Cultural-historical tourism*

This type of tourism has similarities with entertainment tourism, but has a strong historical and cultural side, involves the inspection of natural, historical and cultural attractions, learning new cultures and enriching knowledge of history and traditions. (TUREAC & ANCA, 2008)

- *Transit tourism*

Transit tourism is not a standalone type of tourism but is also important in the industry. Figure 3 shows that transit tourism occurs when a tourist moves between points of origin and destination.

Figure 3 The Tourism System



Source: (HOLLOWAY & HUMPHREY, 2022)

Transit tourism is usually developed in countries with convenient locations and transport connections, because it helps tourists to get to their destination. This type of tourism usually lasts for a short period of time, sometimes even less than 24 hours. (TUREAC & ANCA, 2008)

- *Business tourism*

Business travelers tend to have less freedom in their actions, trips are organized on short notice and for a short period of time. Business travelers value most good facilities, convenient transportation and efficient service. They do not worry about the cost of travel or about expenses because most often all expenses are covered by the company, so the average price of travel does not affect the amount of business travel. (HOLLOWAY & HUMPHREY, 2022)

- *Science (Scientific) tourism*

This type of tourism also has a long history; however, modern science tourism has become similar to business or business tourism but involves familiarization with the achievements of science and technology, participation in congresses and conferences. Also, scientific tourism includes any educational purposes of the trip. (SLOCUM, et al., 2015)

- *Ethnic tourism*

It is divided into 2 main groups: visiting relatives and the place in which a person was born or raised, which is a long-existing type of tourism, and studying the ethnic homeland and

one's people, this type is younger, because for a long-time people were not interested in trips related with the study of their historical homeland. (KURALBAYEV, et al., 2016)

- *Ecotourism (Ecological tourism)*

The International Ecotourism Society defines ecotourism as responsible travel in natural areas that preserves the environment, minimizes negative impacts on it and improves the well-being of local people. Every year it becomes a more and more fashionable tourism destination. (DAS & CHATTERJEE, 2015)

- *Beach tourism*

It is a mixture of several types of tourism: entertainment and medicine, because on the one hand it can be attributed to relaxation, entertainment and leisure time on vacation, and on the other hand to getting rid of stress and healing with sea water. (KURALBAYEV, et al., 2016)

- *Active or extreme tourism*

Often refers to the location of this tourism, such as wild areas that may pose a risk to the tourist, or extreme places relative to the modern way of life of people due to the small amount of possible infrastructure or industrial support. In addition, this type of tourism includes tourism with the goals of active and extreme sports pastime: skiing, rock climbing, swimming with sharks, bungee jumping and other sports that cause an adrenaline rush. (PICKEN, 2017)

- *Shopping tourism*

On the one hand, shopping tourism is a new direction, but even in ancient times, many travelers made trips specifically to buy some exotic things. In modern times, shopping is also a motivation for travel; it has become one of the main types of tourism activities and constitutes a significant part of tourism expenditure. Tourists come to certain places and at the right time for a more effective and profitable pastime. (CHOI, et al., 2015)

- *Gastronomic tourism*

The concept of gastronomic tourism applies to tourists and visitors planning a trip, wholly or partly to taste local products or take part in activities related to gastronomy. (GHEORGE, et al., 2014)

- *Religious tourism*

This type of tourism is one of the oldest types and had a pilgrimage character, but now religious tourism includes tourism whose participants are partially or fully motivated solely by religious reasons: excursions to nearby pilgrimage centers or religious conferences, visits to national and international pilgrimage sites. (RINSCHÉDE, 1992)

3.5 Tourism sustainability

The main component of the development of tourism potential is the sustainability of tourism, which is developed on the basis of crisis situations that have affected the tourism industry. Most crisis management in tourism is viewed primarily in a national or regional context, without addressing natural disasters, epidemics or social unrest. (VARZARU, et al., 2021)

Lessons learned from the crisis can put tourism on a more sustainable footing, addressing sensitive issues such as overtourism, climate change and a systems approach to development models. To develop sustainable tourism, it is necessary to take care of both social and environmental issues, as well as economic issues. (VARZARU, et al., 2021)

Although there were views that tourism has superior resilience and the ability to adapt to catastrophic or unexpected events and recover quickly, the economic and health crisis caused by the COVID-19 pandemic has put the tourism industry under severe stress test, the COVID-19 pandemic has resulted in vulnerability jobs in tourism, especially in small low-income countries. (VARZARU, et al., 2021)

3.6 Tourism infrastructure

The tourism industry is a sector that is constantly evolving and is experiencing the fastest growth worldwide. Such a large and rapidly developing industry is characterized by the presence of infrastructure. Tourism infrastructure includes transport and roads, hotels and other buildings for tourists, technological progress of the industry, special organizations for the provision of tourism services, etc.

- Tourist areas

“Tourist zones” are areas with the maximum concentration of attractions and other objects of tourist interest. (PETROVA, et al., 2018) The larger and more diverse the tourist areas,

the more people will want to visit them, and the more people will be able to find interesting types of leisure and entertainment.

- **Transport and roads**

Transport, one of the key factors of tourism, due to technological changes, mankind has developed different modes of land and air transport for fast and inexpensive movement from one point to another, which has led to a sharp increase in global tourism. The development of air transport has made it possible to travel to different, previously inaccessible parts of the world; now everyone can afford to travel anywhere in the world. In addition to air transport, there are also trains and railways, cars and highways that allow people to move to the desired point by land. The development of transport and tourism has led to economic growth and a higher standard of living, but there are also negative consequences such as pollution, cultural differences, etc. (FIROIU & CROITORU, 2013)

Over time, the tourism industry has been influenced by various economic, political, social or technological factors. However, it is the technological factor that has particularly contributed to the development of this sector, fundamentally changing the perception of tourism products and services. (FIROIU & CROITORU, 2013)

3.7 Sociocultural and economic aspects

The tourism industry plays a huge role in the development of the world, and it is positively and negatively correlated with the economic growth of the global economy. It is essential to plan and develop tourism in a targeted and sustainable manner by seeking trade-offs between environmental, economic and social objectives of society. Management of sustainable tourism development must maintain a high degree of satisfaction of tourists, provide consumers with a significant experience, increase their awareness of sustainability issues and promote sustainable tourism practices among them. (KHAN, et al., 2020)

In a real sense, the tourism industry is connected to all sectors of the world's economy, which positively and negatively affects the GDP of a country. Thanks to the tourism industry, many jobs have been created which play a big role in reducing poverty and socio-economic improvement of the world. (KHAN, et al., 2020) Quality of life is one of the most important goals of sustainable development, also relevant for the tourism sector in terms of

providing services to tourists, as well as taking into account the quality of life of residents of tourist destinations. (STREIMIKIENE, et al., 2020)

Tourism improves a country's trade and also stimulates the industrial sector of the world. There are so many factors that attract visitors to their country, which stimulates the development of the tourism industry in the world. Among these factors, natural beauty and historical sites play a major role in the development of the tourism industry, in addition to this, security and peace also play an important role in the development of this sector. (KHAN, et al., 2020)

Currently, tourism is a major factor in regional development and stimulates new economic activity for many countries. Accordingly, the role of tourism in the economic development of countries is great, it influences social development and contributes to the preservation of cultural and historical heritage. (ABALAKOV & PANKEEVA, 2011)

Tourism, just like other areas, is undergoing globalization, especially in the process of developing mass forms of recreation. Globalization has both positive and negative impacts on the development of tourism, as national, cultural and territorial identity is lost. (ABALAKOV & PANKEEVA, 2011)

From an economic and social point of view, the tourism industry is a large employer and provides employment to a large number of people. However, the problem with this type of employment is the seasonality of tourism, due to which the income of the population and the country can vary greatly throughout the year. According to preliminary estimates for 2021 by researchers, the hotel industry employs about 212 million people around the world. In the European Union, almost 13.6 million people are employed in tourism, and in the United States - about 14 million. (VARZARU, et al., 2021)

3.8 Marketing and tourism promotion

Tourism is a promising and rapidly developing direction, therefore, due to growing competition in the tourism sector, the role of marketing communications is becoming increasingly important. Marketing is the main tool for informing others about what services tourism and hospitality providers are currently providing in the market. The use of modern marketing communication tools such as video advertising, poster advertising, internet

advertising, television advertising and street advertising helps in the management of tourism sites. (ŠVAJDOVA, 2019)

Tourism marketing promotes and facilitates communication between tourists, the destination region and various parts of the tourism industry. Social media is becoming increasingly important as an element of the marketing strategy of marketing organizations and is a tool for reaching global audiences with limited resources. (ŠVAJDOVA, 2019)

3.9 Environmental aspects of tourism

Tourism, like any other sector of the economy, not only brings certain economic benefits to states, but also creates serious problems, such as excessive energy consumption and increasing negative environmental consequences, including climate change. In addition, due to tourism and increased travel, nature is depleted, tourist destinations suffer from a high influx of tourists, and the quality of life of the local population also suffers. Therefore, the state needs to regulate the resources used by this industry, for example, the use of renewable energy sources has a direct impact on mitigating the effects of climate change. (STREIMIKIENE, et al., 2020) Excessive mass tourism causes environmental damage (including pollution and resource depletion) due to unsustainability of tourism. (VARZARU, et al., 2021)

Ecology is a trend that is currently marking the tourism industry. The needs of tourists are constantly changing, and the demand for tourism products and services that do not affect the environment is growing. Governments, investors and local communities are increasingly aware of the need to protect the natural environment, and measures are often taken to reduce emissions, water and energy consumption, mainly through the implementation of sustainable policies and by taking advantage of technological developments. (FIROIU & CROITORU, 2013)

3.10 Trends and prospects for tourism development

Tourism is a global, rapidly developing industry; the number of tourists, according to forecasts by the UN World Tourism Organization, will exceed 1.8 billion people by 2030. The industry is already the fastest growing in the world, even with 2020 being the “worst year in tourism history” due to the global coronavirus pandemic. (HOLLOWAY & HUMPHREY, 2022)

The development of the tourism sector has represented a high priority for policy makers and is considered the second main driving force (after the energy sector) in the future, contributing to increasing national GDP and stimulating the economy. (SECTORAL POLICIES DEPARTMENT, 2022)

4th among Eurasian countries. In the east, north and northwest, Kazakhstan borders with Russia, in the south with the countries of Central Asia - Uzbekistan, Kyrgyzstan and Turkmenistan, and in the southeast with China. The total length of the country's borders is 12.2 thousand km, of which 600 km pass through the Caspian Sea. The capital of the country is Astana (formerly Nur-Sultan), which is located in the northern part of the country in the Akmola region. (KAZAKHSTAN GOVERNMENT, 2024) The second most important city in the country is Almaty, the southern and cultural capital of the state, located in the south of the country in the Almaty region. Astana and Almaty are the largest and most populous, residents of Astana and Almaty are considered to be more advanced and have a high level of income. (KOSHERBAEVA, 2018)

4.1.1 History of tourism in Kazakhstan

The first organizational trips through the territory of modern Kazakhstan are associated with the formation and development of the Great Silk Road, the initial stage of the formation of which dates back to the third millennium BC and is the historical prerequisite for the development of tourism in Kazakhstan. (ERDAVLETOV, 2010)

The oldest information about the nature of Kazakhstan is mentioned in the manuscripts of Ptolemy of the 2nd century AD, the book of Herodotus “Father of History” of 459, the Chinese manuscripts of Chang-Chun and Xuan-Zang of 628 and the records of Arab and Italian travelers. Thanks to its unique location, Kazakhstan has always been interesting and convenient for travelers during their campaigns, therefore, diplomatic and trade relations between the countries of Europe and Asia have passed through the Kazakh steppes since ancient times. In this regard, the first written information about the peoples inhabiting the modern territories of Kazakhstan began to be found in the works of ancient Greek and Roman scientists. (EMEK, et al., 2017)

Throughout history, Kazakhstan has been a major transit hub for travelers traveling from Asia to Europe and from Europe to Asia. Due to its unique location, beautiful views and diverse nature, the state was often mentioned in the works of various scientists and travelers. In Soviet times, Kazakhstan, especially its mountainous areas and regions, were very popular among active tourists. (ERDAVLETOV, 2010)

4.1.2 Tourism industry in Kazakhstan

With the independence of Kazakhstan in 1991, new changes took shape in the tourism sector; the government decided to actively develop this sector, therefore, in the strategic program “Kazakhstan-2030”, the main direction for improving the economic and social condition of the country was the development of tourism until 2010. In this regard, the Law “On Tourism” was adopted in 1992, and in 1994 the Republic of Kazakhstan became a member of the World Tourism Organization. (EMEK, et al., 2017)

A major tourism study in 2017 found that Kazakhstan was visited by 5,990,691 people from foreign countries, of which 23,276 were visiting for business and professional purposes, 15 were on religious pilgrimage, 4,065 were visiting relatives, and 12,017 were on vacation, for the purpose of playing sports - 150, etc. In general, the tourism sector in the country is developing in educational, medical and sports areas. In 2017, the development of active and educational tourism played an important role in Kazakhstan. (EMEK, et al., 2017)

2017 became an important year in the development of tourism in Kazakhstan due to the holding of the international exhibition EXPO 2017 “Future Energy” in the capital of the country - Astana, which attracted many foreign tourists to the country and gave impetus to the development of domestic tourism in the country. The Kazakhstan Tourist Bureau saw that Kazakhstanis and foreign tourists could be interested in local attractions, which had a positive impact on the development of the country's tourism industry. The current theme of the exhibition, as well as an adequate ticket price, ensured that the plan was exceeded by 2 million guests and 5 million visits; 115 countries and 22 international organizations took part in the exhibition, and more than 3.5 thousand cultural events were organized. Thanks to the exhibition, people began to learn about Kazakhstan, come and study the country, which helped Kazakhstan reach a new level of tourism development. (DYUZHAKOVA, 2017)

In 2019, a new state program for the development of the tourism industry of the Republic of Kazakhstan for 2019–2025 was developed and adopted. The main objectives of which were: Development of tourism resources, Ensuring transport accessibility of tourist sites, Improving the quality and availability of tourism products and services, Creating a favorable tourism climate, Forming an effective system for promoting the country’s tourism potential in the domestic and international markets, Improving the management system and

monitoring the development of the tourism industry. (KAZAKHSTAN LEGISLATION, 2019)

In 2023 the Ministry of Tourism of the Republic of Kazakhstan is carrying out comprehensive work on the digitalization of the tourism industry. For example, to increase the comfort of foreign tourists, QR codes are installed at the border, by clicking on which tourists will be able to find information on guides, the cost of a taxi, purchasing an electronic SIM card, etc. Work continues on the digitalization of the activities of guides with the provision of badges to create a unified information base of qualified guides and tour guides, virtual assistant platforms are being developed and implemented in the tourism sector of Kazakhstan, which will help tourists with online search and booking. (KAZAKHSTAN GOVERNMENT, 2023)

All of the above programs and events in the country's tourism industry have had a strong impact on the number of tourists coming to the country and on the number of domestic tourists in the country. The World Tourism Organization has provided a report on these factors:

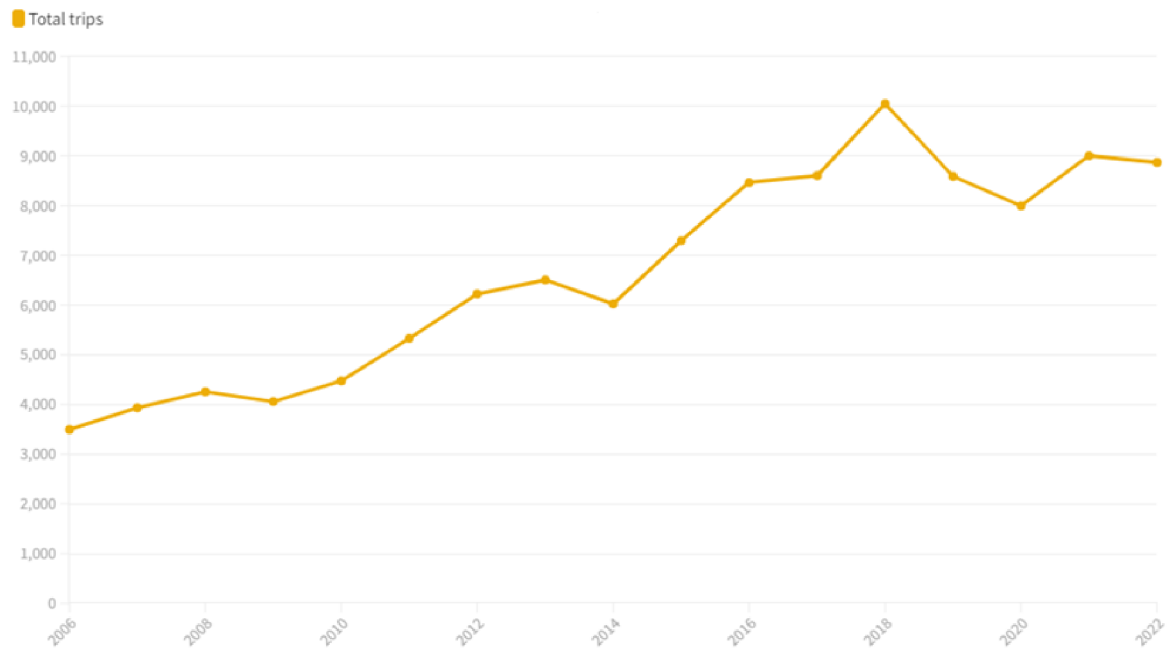
Figure 5 The total number of arrivals to a country from 1996 to 2022 in KZ



Source: (UNWTO, 2023)

Figure 5 shows that the number of tourists visiting Kazakhstan has fluctuated significantly over the years, but there is also a general increase in visitors to the country until 2019, the largest number of visitors was in 2018, which may be due to the positive consequences of EXPO 2017. In 2020, there were critically few tourists due to the global pandemic and self-isolation, but already in 2021, the number of visitors began to gradually increase again.

Figure 6 Domestic travel from 2006 to 2022 in KZ



Source: (UNWTO, 2023)

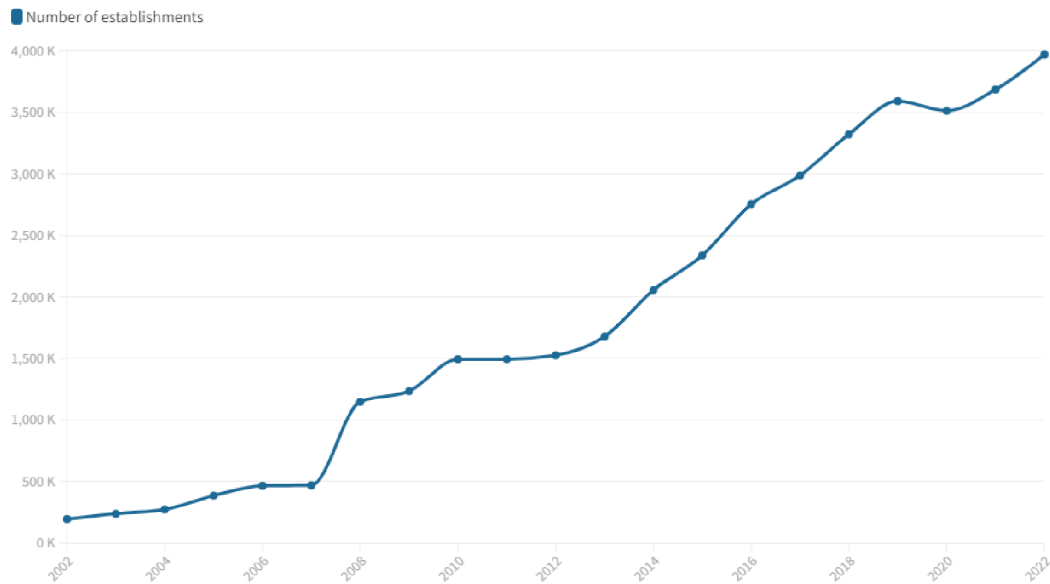
Figure 6 indicates data on the country's domestic tourism, which shows that domestic tourism, as well as external tourism, was at its peak in 2017–2018. However, in 2020, domestic tourism suffered significantly less, this is due to the fact that during the pandemic, state borders became closed, but domestic tourism, although limited, still continued to exist and function.

After the end of the global pandemic, the tourism sector of Kazakhstan began to gradually recover and, according to the results of a JUSAN Analytics study in August 2023, more than 85% of tourists entering Kazakhstan were citizens of three neighboring countries - Russia, Uzbekistan and Kyrgyzstan. Business tourism is popular among those entering the country - about 80% of tourists and only 1% of foreign citizens entering the country indicate the purpose of their trip - tourism. (DAURANOV, 2023)

Infrastructure, including hotels and tourist accommodation, play an important role in the formation and development of the tourism sector. Figure 7 represents the change in the number of hotels in Kazakhstan from 2002 to 2022, which clearly shows a gradual and steady increase in the construction and opening of new tourist accommodation. The strongest growth was observed in the period from 2013 to 2019; Forbes magazine calls this period the

“Hotel Boom” in the country, which occurred due to the increased interest of foreign tourists in the country and additional investments in this sector. (KAINAZAROVA, n.d.)

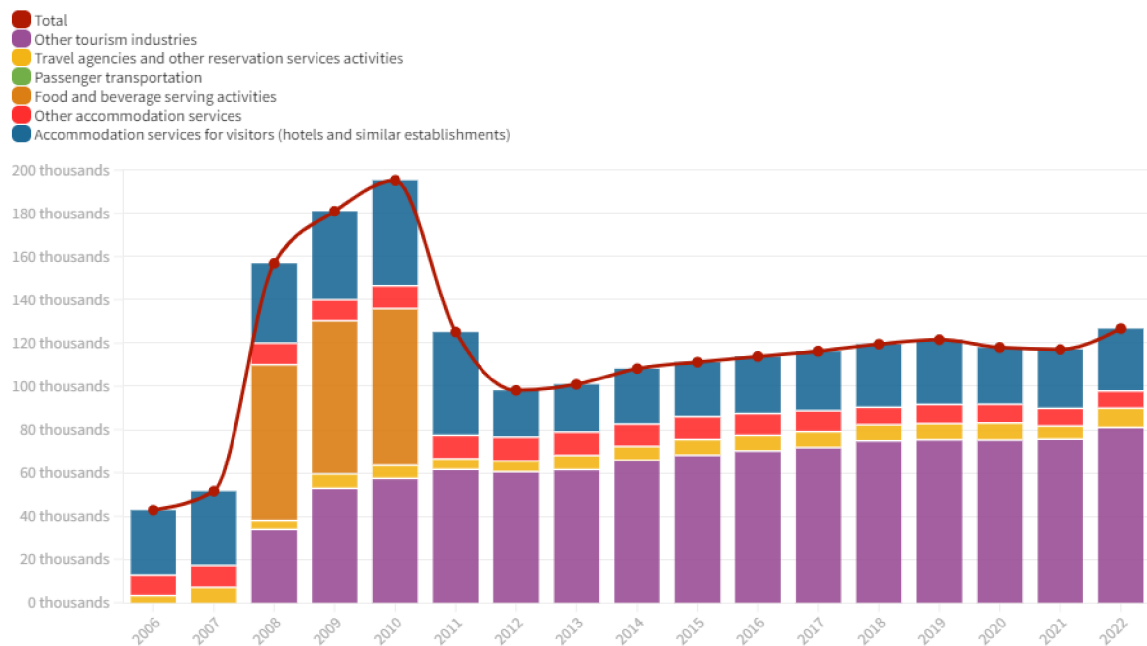
Figure 7 Total number of hotels and similar establishments from 2002 to 2022 in KZ



Source: (UNWTO, 2023)

As mentioned earlier, tourism has a great impact on the economy and on the lives of the country's population. The tourism sector provides a large number of jobs, however the percentage of people working in the tourism sector in Kazakhstan remains small compared to other countries. This is due to the fact that the industry is at its development stage and it is not a priority among the population. Figure 8 shows how the number of jobs in tourism has changed from 2006 to 2022 in Kazakhstan:

Figure 8 Total number of employees by tourism industry from 2006 to 2022 in KZ



Source: (UNWTO, 2023)

The Government of Kazakhstan adopted the National Project for Entrepreneurship Development in 2021 and planned to create 170 thousand jobs in the tourism industry by 2025. (KAZAKHSTAN GOVERNMENT, 2022)

Considering the importance of the tourism industry, the Government of the Republic of Kazakhstan supports its development and has developed a number of strategies and programs, such as the legislation “On tourism activities in the Republic of Kazakhstan, the Concept for the development of the tourism industry of the Republic of Kazakhstan from 2023.” The main goal of these strategies and programs is to promote the development of a competitive and modern tourism industry that is fully integrated into the global tourism market. Thanks to government involvement, the level of tourism in Kazakhstan has improved significantly over the past few years: tourist arrivals and income from the tourism sector have also increased. (KAZAKHSTAN GOVERNMENT, 2023)

4.2 Characteristics of the Almaty region

In this work, the author examines in more detail the Almaty region and the city of Almaty, which are located in the South/South-East of the country, because this region is rich in tourist attractions, both historical, cultural and natural. Almaty region is an administrative region located in the southeast of Kazakhstan. The area of the region is 223,911 square

kilometers, and the population is about 2 million people. The region is administratively divided into 17 districts and 3 cities. (TAMENOVA, et al., 2020)

Figure 9 shows the largest cities in the Almaty region: the city of Taldykorgan, Almaty, Talgar, Tekeli, Panfilov, Ushtobe and Sarkand. The largest city in the region is the former capital of the country and the current cultural capital - the city of Almaty, which is the largest socio-economic, cultural and political center of the country. (BRITANNICA, 2024)

Figure 9 Map of Almaty Province Today



Source: (DEOM, et al., n.d.)

The Almaty region does not have significant mineral reserves. There is the light and food industry, mechanical engineering, construction industry, etc., but in general it is characterized by an agricultural orientation due to the favorable climate, fertile soil and a large number of reservoirs in the region. (BARDAKHANOVA, et al., 2021)

4.2.1 Infrastructure analysis of the Almaty region

The region's infrastructure is well developed, especially in the city of Almaty. Transport is on a good level of development: in the city and region there are many routes

and roads that lead to different parts of the country; in addition, the city has an airport with domestic ones (Astana, Uralsk, Shymkent, Kyzylorda, Aktobe, Atyrau, Petropavlovsk, Semey, Ust -Kamenogorsk, Aktau, etc.) and international flights (Antalya, Baku, Moscow, Dubai, Istanbul, London, Tashkent, Doha, Sharm El-Sheikh, Beijing, etc.). Public transport in the city includes 11 metro stations, buses, trolleybuses and shuttle buses. (AKIMAT ALMATY, 2024)

Over 35% of all higher education institutions in the country are concentrated in Almaty: Al-Farabi Kazakh National University, pedagogical, economic, polytechnic, agricultural and medical institutes, the Academy of Sciences of Kazakhstan and numerous research institutes subordinate to it. The city is popular among students and young people. (TAZABEKOVA, 2016)

The city bears the title of the cultural capital of the country, which houses numerous museums, an opera house, theaters in Russian, Kazakh and Uyghur languages, the State Public Library, 30 libraries, a botanical garden, a zoo, circuses, cinemas and several stadiums and parks. In addition, the city has a large number of schools, kindergartens, entertainment centers and offices. (TAZABEKOVA, 2016)

The city is very popular among tourists. The number of accommodation places increased by 17% and amounted to 383 thousand in 2023. The one-time capacity in hotels in Almaty amounted to more than 24.3 thousand beds, which is 13.3% more than last year. (AKIMAT ALMATY, 2023)

In order to improve the tourism infrastructure in mountainous areas, the government has digitized more than 1,000 km of mountain hiking routes in 2023, of which more than 650 km have been improved, and 7 camping zones have been created. All digitized routes are available on the 2Gis and View Ranger platforms. Along these routes there are information stands, signs, information boards, information posts, benches and gazebos. All navigation stands have QR codes where tourists can get acquainted with the complexity of the route, its length and travel time. (AKIMAT ALMATY, 2023)

4.2.2 Economic development of the Almaty region

The annual Forbes.kz rating showed that in 2019 the Almaty region was in 13th place out of 17 regions in terms of economic development. This is due to the fact that after the

division of the South Kazakhstan region, the Almaty region became the most densely populated region with a population of 2 million people, or 11.1% of the country's population. (TSAURKUBULE, et al., 2020)

The city of Almaty is one of the largest financial, economic and social centers of the country. Distinctive characteristics are a high level of human resources, a stable level of well-being of citizens, a developed industrial sector and the presence of scientific and technical potential; regional policy provides for a comprehensive expansion of infrastructure, the formation of business centers and the development of tourist destinations. (TSAURKUBULE, et al., 2020)

Almaty is a major industrial center of the country: the food industry accounts for about one third of industrial production, and light industry accounts for about one quarter. The city is the country's largest center of business and entrepreneurial activity. The city of Almaty has the highest per capita income in the country along with Astana. (ABDULINA & ABELDANOVA, 2018)

Almaty has significant scientific and research potential: it accounts for more than 40% of the country's scientific organizations, about 50% of the total number of workers performing research work. Almaty is home to many scientific institutions, design institutes and higher education institutions. The main task facing development in the city is to ensure the integration of education, science and production to implement the results of scientific research into production. (TAZABEKOVA, 2016)

On the other hand, the city of Almaty is characterized by social problems such as high crime rates and high food prices. The reason for the first problem is the presence of a large number of migrants (a large city in the border zone). The second is the result of the excess of demand for goods and services over supply (caused by above-average incomes of residents). However, the city of Almaty has growing investment in education, high literacy rates and above average life expectancy. (TSAURKUBULE, et al., 2020)

4.2.3 Ecological aspect of the development of the Almaty region

The ecological situation of the Almaty region has a great influence on the development of the region as a whole, due to the large number of national parks, favorable climate and fertile soil, the Almaty region has a large number of forests and trees, which has

a beneficial effect on the environmental situation in the region. Since Soviet times, the city of Almaty has received large funding for the maintenance and expansion of its gardens and parks from the state, it was then that Almaty received the unofficial status of a “garden city”: much attention was paid to the development of green infrastructure, especially the Central Park of Culture and Recreation. (PAKINA & BATKALOVA, 2018)

Until the early 1990s, the city remained one of the greenest cities of the post-Soviet space, but after the collapse of the USSR, due to the lack of necessary funds from the state, the area of green spaces in the city began to shrink significantly, gardens were abandoned and unique plant species were lost, which contributed to the deterioration of the ecological situation in the city. (PAKINA & BATKALOVA, 2018)

In the conditions of the Almaty agglomeration and the city of Almaty, located in difficult geological and geomorphological conditions: in the foothills of the northern spur of the Tien Shan - Trans-Ili Alatau, pollution of the urban environment has become a big problem. (BITYUKOVA, 2022) The city is located at an altitude of 600–1650 meters above sea level, in a depression, with frequent calms and fog, which significantly complicates the dispersion of pollutants. This feature leads to the accumulation in the lower layers of the atmosphere of pollution produced by vehicle exhaust gases, emissions from power plants and industrial facilities. The phenomenon of smog has become familiar to the city of Almaty, regardless of the time of year. (PAKINA & BATKALOVA, 2018)

Currently, the city of Almaty is characterized by a difficult environmental situation, not only because of its location in the foothill basin, but also because of the problems typical of large cities. This situation is aggravated by a large number of high-rise buildings, which create additional obstacles to the movement of air flows. In this regard, the main problem of the city is the severe deterioration of the environment in conditions of poor natural ventilation, so a very relevant solution to the problem is monitoring the green spaces of the city, including an inventory and assessment of the current state of the flora. (SADYROVA, et al., 2023)

In addition to the problems of air pollution and restoration of green spaces in the region, there is another problem - the location in a seismically active zone. Almaty is located in an area of high geological risk, prone to both earthquakes and landslides. Despite a number

of steps taken by the government to improve the city's safety from earthquakes and landslides, the risk of suffering from a natural disaster remains. (BRITANNICA, 2024)

4.3 Tourism of the Almaty region

The Almaty region and the city of Almaty are the most popular destinations among Kazakhstani and foreign tourists, this may be due to the rich cultural and natural heritage of the region. According to a JUSAN Analytics study for 2020, tourists choose the southern capital of the country, Almaty, more often than the state capital, Astana. Having analyzed data on domestic tourist flow for 7 years (2014–2020), the researchers came to the conclusion that the most popular destinations among domestic tourists are the city of Almaty - 954 thousand tourists per year and Almaty region - 790 thousand tourists per year. (DAURANOV, 2023)

As mentioned above, the city of Almaty is an attractive destination among tourists and its popularity and demand is growing every year more and more; at the end of 2022, the total number of tourists in the city amounted to more than 1.2 million people, which is 1.5 times more compared to 2021. According to the results of the report of the Akimat of the Almaty region (the main state body of the region), the number of foreign tourists increased by 2.8 times, and domestic tourists by 1.4 times. (AKIMAT ALMATY, 2023)

The Almaty Tourism Department also presented a report for the first half of 2023 as part of a press conference on the topic “Tourism Development in Central Asian Countries,” which indicated that the total number of tourists in Almaty reached to 972,157 people. According to the department, the number of foreign tourists amounted to 261,571 people, of which the largest number were from Russia - 39.2%, China - 9.2%, India - 7%, Turkey - 6.6%, USA - 3.4%, South Korea - 3.2%, Uzbekistan - 2.9%, Kyrgyzstan - 2.8%, Germany - 2.5%. The number of domestic tourists visiting the city was 710,586 people. According to estimates by the Almaty City Tourism Department, the overall dynamics of the number of tourists shows an increase of 25.5%. (FORBES KAZAKHSTAN, 2023)

4.3.1 Analysis and evaluation of the tourism potential of Almaty

For any successful tourism region, it is necessary to have “tourist zones”, which will concentrate a large number of attractions and interesting places that will encourage tourists to visit them. Almaty region is a unique region of Kazakhstan, which is home to many natural

and historical attractions. The area itself is unique because it consists of a large number of “tourist areas”. Table 1 represents the main tourist areas, according to the National Tourism Portal - Kazakhstan Travel, of the Almaty region include:

Table 1 The main tourist areas in Almaty region

Name	Characteristics	Location	How to get there	Infrastructure	Source
<i>Lake Kaindy</i>	located at an altitude of 1667 m. Tourists are attracted by its surreal view: the trunks of giant fir trees rise from the turquoise surface of the lake, like the masts of sunken ships	288 km from the city of Almaty	car, organized excursions	in the summer it is possible to stay in yurts (Kazakh national dwellings) before going down to the lake	(CENTRAL-ASIA-TRAVEL, 2024)
<i>Charyn Canyon</i>	it is a whole complex made up of sedimentary rocks. Its length is over 150 km, and the height of the formidable rocks reaches 300 meters. Once upon a time, this territory was flooded by the huge Ili Lake, but	200 km from the city of Almaty	car, intercity buses, organized excursions	on the territory of the canyon there is an “Eco Park” with a summer cafe, gazebos on the riverbank, overnight accommodation in national yurts or small bungalows	(KAZAKHSTAN-TRAVEL, 2024)

	over time the water dried up, leaving behind an unusual and majestic landscape				
<i>Ayuly waterfall (Ayusai)</i>	three waterfalls are located in the Ayusai gorge at a short distance from each other in the Ile-Alatau National Park	20 km from the city of Almaty	hiking trails of the national park (1.9 km one way), to hiking trails by car, taxi, public transport - bus	cafe and tourist office at the beginning of the route	(ILE-ALATAU, 2024)
<i>Lake Issyk</i>	a picturesque, high-mountain lake surrounded by unusually beautiful nature, dense forests and wide flower fields. The lake is located at an altitude of 1760 meters above sea level	73 km from the city of Almaty	car, organized excursions	gazebos and camping areas	(ILE-ALATAU, 2024)
<i>Saki mounds</i>	a unique burial complex, the	11 km from the	car, taxi, public	yurts, museum administration	(KAZAKHSTAN-TRAVEL, 2024)

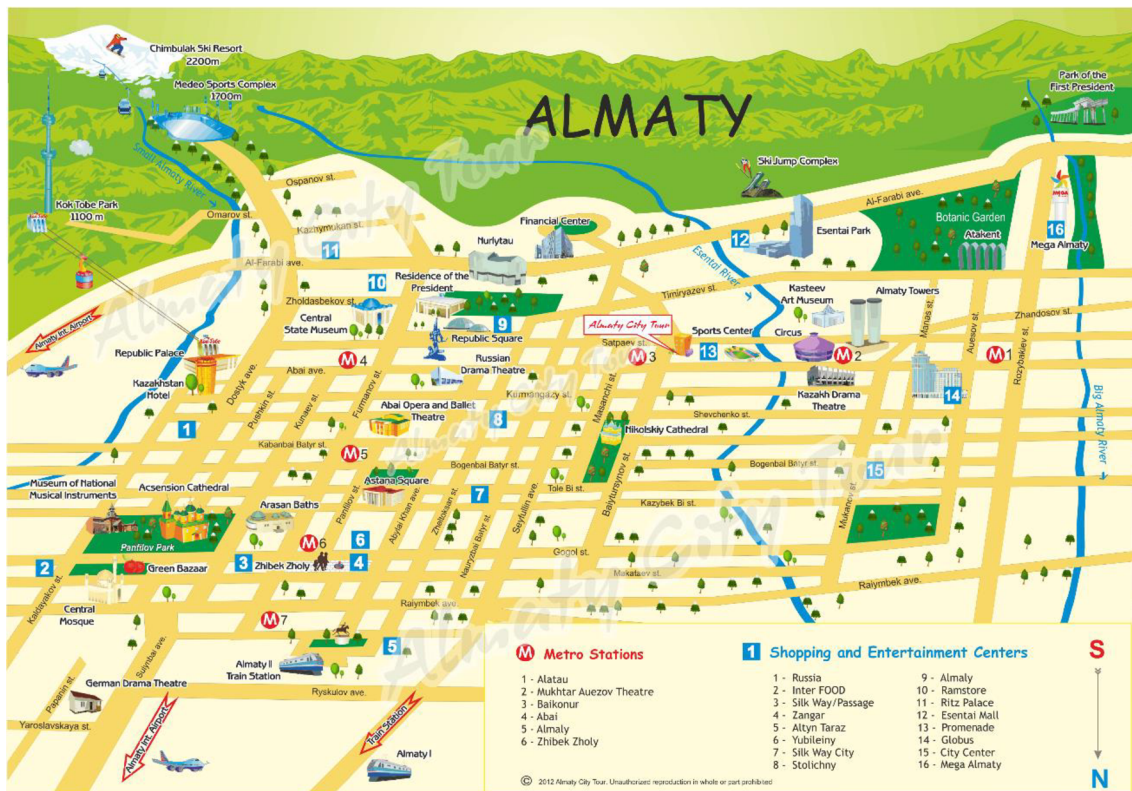
<i>(Boraldai mounds)</i>	complex contains 47 mounds dating back to the early Iron Age	city of Almaty	transport - bus from Almaty and then on foot 1.5 km, organized excursions		
<i>Big Almaty Lake</i>	located at an altitude of 2510 m above sea level. Tourists are attracted by its impressive size and amazingly beautiful color	15 km from the city of Almaty	car, taxi, public transport - bus from Almaty, organized excursions	there are many cafes and hotels along the road to the lake	(ILE-ALATAU, 2024)
<i>Ile-Alatau National Park</i>	the beautiful and wild territory of the national park is closely adjacent to the borders of the city; beautiful forests and groves of relict Sievers apple trees grow there, which are considered the ancestors of all modern fruit and	21 km from the city of Almaty	car, taxi, organized excursions	gazebos and tourist centers	(ILE-ALATAU, 2024)

	apple culture in the world				
<i>Altyn-Emel National Park (singing dunes)</i>	famous primarily for its unique natural sites, for which thousands of tourists from all over the world come there: first of all, the Singing Dune and the Aktau chalk mountains	250 km from the city of Almaty	car, organized excursions	there are several hotels and guest houses, there are places for camping and recreation	(ALTYN-EMEL, 2024)
<i>Tamgaly-Tas</i>	Petroglyphs of Tamgaly Tas is a major world center for the distribution of rock art, which stretches along the belt of mountains and foothills from the Sayan and Altai to the Tien Shan and Pamir	267 km from the city of Almaty	car, organized excursions	places for camping and recreation	(ALTYN-EMEL, 2024)

Source: author

In addition to the unique attractions throughout the region, the southern capital of the state, the city of Almaty, also belongs to a large “tourist zone”. Figure 10 shows the main attractions of the city, which are analyzed in more detail by the author below based on an article from the main information website of the country Nur.kz:

Figure 10 Almaty city Tourist Map



Source: (FORBES KAZAKHSTAN, 2024)

- *Kok-Tobe*

An ideal place to view the cityscape, beautiful views, art gallery, climbing wall, observation deck, restaurants, TV tower and zoo. You can climb Mount Kok-Tobe by car, by cable car or on foot.

- *Sports complex and Medeo skating rink*

A legendary sports complex with the world's highest skating rink and unique ice quality, which is open all year round. You can climb to the complex via a staircase consisting of 842 steps.

- *Republic Square*

The main square of the city, the “heart” of Almaty, where all the main holidays, events and demonstrations take place.

- *Park named after the First President*

One of the most popular places in Almaty, a large area with boulevards, squares, alleys and a large fountain.

- *Central State Museum*

One of the oldest and richest museums in Asia. The museum's collection includes more than 300 thousand exhibits.

- *Ascension Cathedral*

A unique wooden architectural structure with unusual construction technology without the use of nails, it has very beautiful and picturesque architecture.

- *Memorial of Glory*

The memorial complex is located in the park named after 28 Panfilov Guardsmen. The memorial was built for the 30th anniversary of the victory in the Second World War. Simultaneously with the opening of the memorial, the Eternal Flame was lit.

- *Museum of Folk Musical Instruments named after Ykylas*

A museum with a large collection of Kazakh folk instruments and thematic exhibits from many countries. The museum contains instruments that were played by famous cultural figures. The building itself is ancient - it is more than 100 years old.

- *Kazakh National Opera and Ballet Theater named after Abai*

A theater for lovers of opera and ballet with a large and rich program for spending time in a peaceful atmosphere and cultural enrichment.

- *"Almaty Arbat"*

The pedestrian street is always full of musicians and artists, there is the highest concentration of souvenir shops and cafes with international cuisine, urban sculptures and a small wall.

All of the above attractions are located within the city of Almaty and can be reached by car, bicycle, taxi, public transport and on foot. All attractions are located next to well-developed infrastructure. Guests of the city have the opportunity to visit all the attractions on their own or using the services of special travel companies. (NURKZ, 2022)

4.3.2 Questionnaire survey

To better understand the current situation in the tourism sector of the Almaty region and the city of Almaty, the author compiled a questionnaire that was distributed to a random sample of people. The survey was distributed among 200 people via social networks; a total of 115 people completed the survey. An important aspect is that the survey was taken

exclusively by people who were in the Almaty region or the city of Almaty. Table 2 shows the demographic data of respondents:

Table 2 Demographics of respondents

	18-24	25-34	35-44	45-54	55+	Grand Total
Man / Мужчина	15	8	11	7	1	42
Woman / Женщина	32	14	15	12		73
Grand Total	47	22	26	19	1	115

Source: Questionnaire survey.

Table 2 shows that the majority of respondents are women (73 people), and the largest age category that completed the survey are people from 18 to 24 years old (47 people). The second age category by the number of people participating are people from 35 to 44 years old (26 people).

Table 3 The origins of the respondents

Country	%
Belarus	1%
Czech Republic	3%
France	1%
Kazakhstan	85%
Kyrgyzstan	1%
Russia	7%
Spain	1%
Uzbekistan	1%
Vietnam	1%

Source: Questionnaire survey.

Table 3 shows where the survey respondents are from. 85% of respondents who visited Almaty, or the Almaty region are from Kazakhstan, 7% of respondents from Russia, 3% from the Czech Republic and only 1% of respondents each from Belarus, France, Kyrgyzstan, Spain, Uzbekistan and Vietnam. The largest group are people from Kazakhstan, but all these people are from different cities and regions of the country, namely: 52% from the city of Aktobe, 13% from Astana, 11% from Aktau, 5% from Karaganda, 4% each from Pavlodar and Shymkent, 2% each from Kostanay, Semey, Uralsk and Ust-Kamenogorsk, and 1% each from Atyrau and Borovoye.

In the second part of the survey, respondents were required to answer general questions related to their preferences in tourism. 93.9% of people like to travel, 4.3% find it difficult to answer this question and only 1.7% do not like it. The majority - 60.9% travel two times a year, 20.9% travel once a year and a small percentage of respondents travel less or more often than the rest.

Figure 11 Preferred holiday type



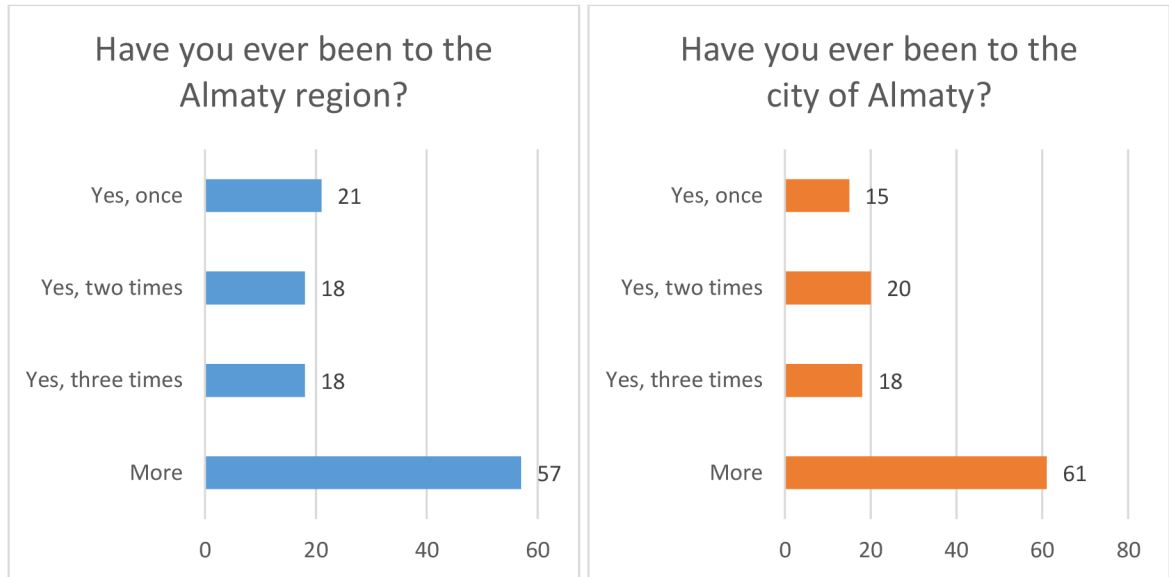
Source: Questionnaire survey.

Figure 11 shows which types of recreation are most common and in demand among respondents. The most popular type of vacation is Beach vacation - 60%, followed by Cultural and historical - 57.4%, Active extreme - 34.8%, Medical and recreational - 24.3%, Shopping tourism - 22.6%, Gastronomic tourism - 16.5%, Ecotourism and Business tourism – 13% and less in demand Religious tourism – 8.7%.

When asked about the preferred type of stay. 60% prefer to stay in a hotel with all the amenities, while 16.5% say it does not matter to them, the third largest group of respondents prefer to stay with relatives or friends – 9.6%. The largest group in organizing holidays are people who independently plan their holidays and book hotels - 47%, while 27% of respondents prefer to buy ready-made trips and tours from travel agencies, 20.9% prefer to plan their holidays based on the experience of relatives and friends.

In the third part of the survey, respondents were required to answer questions related directly to their experience of visiting Almaty and the Almaty region. Figure 12 shows that most of the respondents visited the city and region more than 3 times:

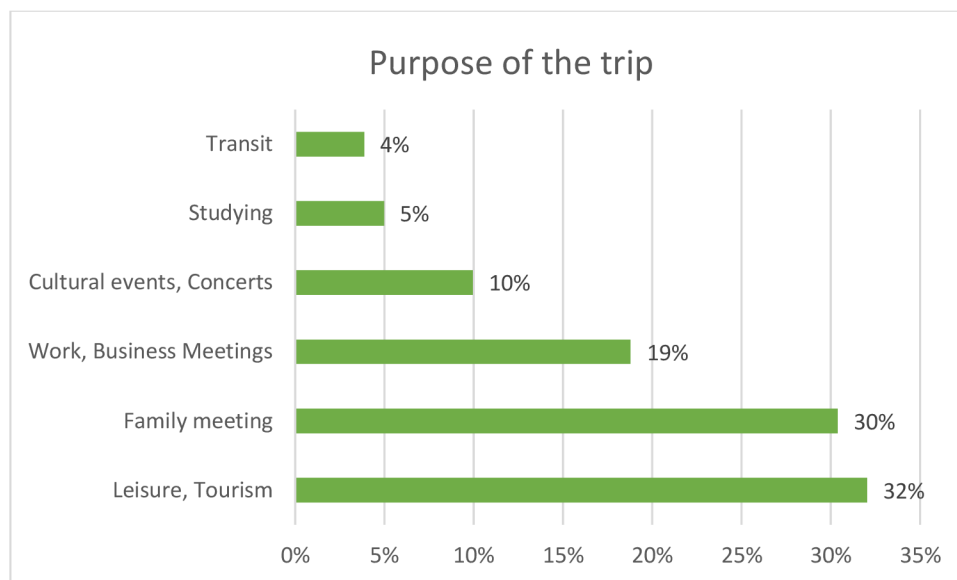
Figure 12 Almaty region and Almaty city visits



Source: Questionnaire survey.

Figure 13 shows for what purposes respondents most often came to the region: 32% came for recreation and tourism, 30% for family meetings, 19% for business and work, 10% for cultural events and concerts, 5% for study and 4% were in transit in the region.

Figure 13 Purpose of the respondents' trip



Source: Questionnaire survey.

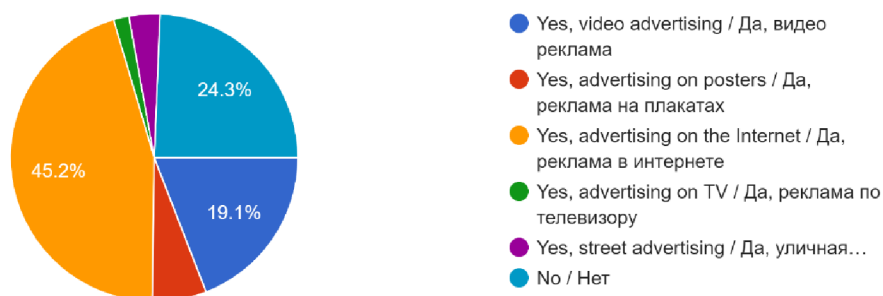
The majority of respondents - 44.3% were in the Almaty region for more than 2 weeks, in second place are people who stayed there for several days - 22.6%, followed by people who stayed there for a week - 19.1%, 11.3% - 2 weeks and the smallest percentage of people who were in the region for 1 day – 2.6%. Respondents highlight that the region has a large number of interesting places to visit, which is why they are attracted to this region. 73.9% of respondents are interested in the sights of the city and the region, 15.7% liked the region with a large number of different events in the city of Almaty.

An important part of promoting any direction and region is advertising; Figure 14 shows what kind of advertising in the Almaty region respondents have ever encountered:

Figure 14 Advertising of Almaty region

Have you ever seen tourism advertising about this region? / Встречалась ли Вам когда-либо реклама туризма о данном регионе?

115 responses



Source: Questionnaire survey.

45.2% of respondents saw advertising on the Internet, 24.3% did not see any advertising, 19.1% saw video advertising for the region. The results obtained show us that the advertising for this region is not well developed to attract more new tourists.

In the fourth part of the survey, the author checked respondents' awareness of the main attractions of the Almaty region and the city of Almaty and which of the attractions the respondents had already visited. The results of this part of the survey showed that respondents were well acquainted with the main attractions, especially Kok-Tobe, the Medeo skating rink and Almaty Arbat in the city and the Charyn Canyon, Issyk Lake and Big Almaty Lake in the region. However, the author noted that respondents' awareness mainly depends on visiting these places, which means that respondents who have not visited some attractions are poorly aware of their existence.

The last fifth part of the survey concerns respondents' satisfaction with visiting the region, namely: "Do you consider the city of Almaty and the Almaty region to be good options for visiting?" - 73.95 respondents answered yes, and identified a large number of interesting places in the region; "Would you recommend someone to visit this region for a visit?" - 81.7% of respondents believe that this region can be recommended to everyone without exception, since a trip can be organized for any budget;

"Are you satisfied with the current stage of tourism development in this region?" - 32.2% of respondents are satisfied with the current stage of tourism, but believe that it needs

to be developed further, 27.8% believe that the sector is already well developed, 14.8% are satisfied, but think that the industry is not at a good enough level and 13.9% are not satisfied and believe that it needs to be further developed.

To the question “What would you like to change or add for the successful development of tourism in the Almaty region?” the author received the following recommendations from respondents:

- Infrastructure improvement: construction and renovation of hotels; airport renovation; improvement of tourist sites and public places; accessibility of transport both around the city and to tourist sites in the region; improvements to transport roads and junctions to prevent traffic jams
- Development of tourism services: availability of ecotourism, ski holidays, organization of various events
- Marketing development
- Reduce prices for tourist services

4.3.3 Perspectives of tourism development in Almaty

Kazakhstan's tourism potential is rich and diverse, especially in the Almaty region and the city of Almaty. The region is located in a picturesque mountainous area with a large number of natural parks, reservoirs and cultural and historical attractions. The region has opportunities for the development of many types of tourism, such as ecotourism, nature tourism, lake tourism, medical tourism, cultural tourism, educational, entertainment and others. This is due to the fact that this region is rich in “tourist zones” of different types and directions.

In addition, the state is investing funds and efforts in the development of this region: since 2019, 91 tourism facilities have been put into operation, and 11 tourism facilities and 147 jobs were planned for 2022. The volume of investments in fixed capital in the tourism industry of the Almaty region for January-May 2021 amounted to 19.9 billion tenge (\$44

million), while for January-May 2022 it was 7.2 billion tenge (\$16 million). (KAZAKHSTAN GOVERNMENT, 2022)

The government continues to improve the infrastructure of the region and is taking a number of measures aimed at ensuring the safety of tourists in the mountains; in June 2022, an additional checkpoint and rescue point was installed in the Small Almaty Gorge. Also in 2022, it was planned to continue work on the improvement of the Ile-Alatau National Park: to improve 12 mountain routes with a total length of about 150 km, as well as to create additional camping areas in the most popular mountain locations. (KAZAKHSTAN GOVERNMENT, 2022)

Much attention is also paid to the marketing development of tourism, for example, in April 2022, the largest tourism exhibition in Central Asia, KITF-2022 “Tourism and Travel,” was held in Almaty. 2 thousand professionals, 200 companies from 22 countries took part in it. More than 1,200 contracts were signed during this exhibition. (KAZAKHSTAN GOVERNMENT, 2022)

The New York Times published on January 9 its annual list of 52 tourist destinations in 2024, in which Kazakhstan's Almaty took 25th place. The Vice Minister of Tourism and Sports of Kazakhstan said that in recent years Kazakhstan has increasingly been included in world rankings. “Inclusion in The New York Times list demonstrates the growing interest of tourists in our country.”. (SAKENOVA, 2024)

5 Results and Discussion

5.1 The main identified problems and recommendations

Kazakhstan is increasingly gaining popularity in the global information space, more and more people are beginning to know about Kazakhstan and are eager to visit the country, so the development of tourism is a promising direction for the state's economy, especially in such a picturesque place as Almaty with a huge number of attractions and picturesque places. At the moment, there is a visa-free regime for entry into Kazakhstan for citizens of 77 countries, including a visa-free regime of up to 14 days for citizens of China, India and Iran. International flights take place through Almaty and Astana with 28 countries on 111 routes. (KAZAKHSTAN GOVERNMENT, 2023)

Despite the positive dynamics of tourism development in the Almaty region, the author identified a number of problems in this sector and wrote recommendations that may help solve these problems:

- *Poor infrastructure development outside the city of Almaty*

Many tourists complain about the poor development of infrastructure outside the metropolis, perhaps due to the fact that more funds are allocated to finance the city. However, the author does not exclude the possibility of corruption in the region. The author recommends allocating more funds to develop the infrastructure of attractions in the region, attracting more investment, or identifying and solving the problem of corruption.

- *The deterioration and obsolescence of some tourist accommodations*

Many tourists note the deterioration and obsolescence of hotels and other places of residence; to solve the problem, the state needs to allocate money or find investors for the reconstruction or construction of new hotels. The author also believes that it may be necessary to reconsider the standards in the field of hotel services in the region and close places of residence that do not meet the standards.

- *High prices for tourist services*

Due to the high standard of living in the metropolis (2nd place in Kazakhstan), many tourists, usually domestic tourists from other regions, face problems with high prices for tourism

services. This problem is global for the country due to the lower standard of living of people in other regions compared to the cities of Almaty and Astana. Perhaps the state needs to stabilize economic differences in different regions of the country. The author also does not exclude the fact that high prices for tourist services arise due to the insufficient number of alternatives that need to be provided for tourists.

- *Heavy traffic jams within the city*

Many tourists complain about heavy traffic jams within the city while moving between city attractions. The author proposes to solve this problem by introducing special lanes for public transport and running tourist buses to the most common attractions of the city.

- *Lack of development of a year-round tourist season*

Almaty and the Almaty region have a unique location among high mountains with incredible scenery. However, the author noted that most of the attractions are open and functioning in the summer, so the author proposes to develop trips to national parks and reserves in the summer, and in the winter to focus on the development of skiing and health-improving types of tourism. Thanks to the snow-covered mountain slopes, ski resorts and spa resorts in the mountains, the Almaty region will be able to receive tourists both in summer and winter.

- *Weak marketing strategy*

The author noted that a large number of tourists have not encountered any type of advertising for this region, which is why it will be difficult for the Almaty region to attract new tourists and make them aware of the services and offers for tourists. The author suggests directing a marketing campaign to social networks, attracting popular influencers, and launching a number of competitions and programs that can show the beauty of the region.

The author believes that after solving all the above problems, the dynamics of development of the tourism sector of the Almaty region and the city of Almaty will increase significantly. The industry will generate large and stable income, the invested funds will pay off, and the city and region will be known outside of Kazakhstan.

5.2 SWOT analysis

Based on the author's analysis of the region and the questionnaire, 4 main strengths and weaknesses, threats and opportunities were identified, and the following SWOT analysis in Table 4 was compiled:

Table 4 SWOT analysis of tourism in Almaty region and Almaty city

Strengths	Opportunities
Great development prospects State support and funding A large number of "tourist areas" Variety of types of tourism that can be developed in the region	Improving the sustainability of tourism in the country Additional jobs Stable income from the tourism industry World fame among other countries
Weaknesses	Threats
Weak advertising strategy Worn and outdated hotels and other places to stay Lack of necessary infrastructure in natural tourist spots High prices for travel services	Deterioration of the environmental situation in the region Pollution of natural objects due to the large influx of tourists Depreciation of cultural values Failure to recoup the costs of improving the sector

Source: Author.

- *Strengths*

1. Today, the tourism sector of the Almaty region and the city of Almaty has great development prospects and high potential, because the region is interesting both for domestic tourism and for foreign tourists. The region has good infrastructure development, especially in the city of Almaty.

2. The tourism sector is an important component of the current policy of Kazakhstan, therefore it has support and funding from the state, which is implementing many programs for the development of the industry.

3. A large number of “tourist zones” in the region is a huge plus in the development of tourism. The region is rich in both natural and cultural-historical attractions, which are located at relatively small distances from each other for Kazakhstan.

4. The variety of types of tourism that can be developed in the region is great. Due to the high mountainous location of the region, it is possible to develop a year-round tourist season, when tourists can relax at ski resorts in winter and visit natural parks and reserves in summer.

- *Weaknesses*

1. The weak side of tourism is an ineffective or insufficiently developed advertising strategy, because a significant part of the survey respondents has never seen advertising of the region on any advertising platform.

2. The deterioration and obsolescence of hotels and other places to stay are also one of the negative experiences of tourists in this region. Respondents note that living in good conditions is quite expensive and does not always meet their standards.

3. The lack of necessary infrastructure in natural tourist places is also one of the problems of the region, although the government is taking a number of actions to improve it, respondents continue to complain about its poor development outside the city of Almaty.

4. Some people highlight the problem with high prices for tourism services in the region. Many natural attractions are located in places remote from the city of Almaty, where it is difficult to reach on your own, so travel agencies provide one-day or multi-day tours, which can be expensive for most tourists coming to the region.

- *Opportunities*

1. Due to the demand for the region among tourists coming or traveling around Kazakhstan, the Almaty region and the city of Almaty have an impact on the entire tourism industry of the country, so the development of this region will lead to an improvement in the sustainability of tourism in the country as a whole.

2. Additional Jobs - The city is a student city due to the presence of various universities and colleges, so the tourism sector can be a good start for many students to work in this field. Apart from students, any residents of the region can find well-paid jobs in this sector.

3. If the tourism sector of a given region is properly developed, the state and small and medium-sized businesses can receive a stable income from the tourism industry, especially if a year-round tourist season is developed.

4. In recent years, Kazakhstan has increasingly participate in various international events, which has a positive effect on the country's global fame among other countries. The tourism industry can help further promote the country's visibility, introduce tourists to the culture and traditions of Kazakhstan, and dispel stereotypes about the local population.

- *Threats*

1. The region has a number of environmental problems, especially the city of Almaty, which may worsen due to the construction and improvement of infrastructure and the large number of tourist cars in the region.

2. The development of tourism and the attraction of a large number of tourists can lead to the pollution of natural objects (for example, scattered garbage, lighting fires in the wrong places, etc.) and deterioration of their ecological condition.

3. Depreciation of the cultural values of the region - any popular tourist site risks losing its cultural or natural significance. For example, strong improvement of natural parks and infrastructure development can negatively affect flora and fauna, lose their natural values and become exclusively commercial in nature.

4. Any costs for the development of the industry have a risk of not being recouped, so the government should draw up an effective development strategy so that the funds raised for tourism development are profitable for visiting tourists.

6 Conclusion

Nowadays, tourism is a large and important industry from both an economic and social point of view. It has its own types, motivation, history, sustainability, infrastructure, marketing and potential. Tourism activities have a strong impact on economic and social development, as it affects GDP, so any promising state tries to develop and improve this sector.

This bachelor's thesis was aimed at studying the tourism industry of the Republic of Kazakhstan, in particular the current state of tourism development in the Almaty region and the city of Almaty, because according to the Ministry of Tourism of Kazakhstan, the Almaty region is the leader in the concentration of tourist territories and products of the country.

The purpose of this bachelor's thesis was to analyze the development of tourism in the city of Almaty and its surroundings. The author noted that the development of tourism infrastructure in the city of Almaty is much higher than in other parts of the region and even near the main attractions of the Almaty region. The work characterized and analyzed tourist places and attractions of the city and region. Based on the analysis, the author revealed that the Almaty region and the city of Almaty are rich in “tourist zones” that are suitable for the development of different types of tourism: ecotourism, cultural-historical, health-improving, business tourism, active and extreme tourism, entertainment, gastronomic tourism.

The author identified the strengths and weaknesses, opportunities and threats of tourism in the selected region. Strengths include great development prospects, support and funding from the state, a large number of “tourist zones”, and a variety of types of tourism that can be developed in the region. Opportunities include improving the sustainability of tourism in the country, additional jobs, stable income from the tourism industry, global fame among other countries. The following weaknesses were identified: a weak advertising strategy, deterioration and obsolescence of hotels and other places to stay, lack of necessary infrastructure in natural tourist places and high prices for tourism services. The main threats identified are deterioration of the environmental situation in the region, pollution of natural objects due to the large influx of tourists, depreciation of cultural values and failure to recoup the costs of improving the sector. Factors influencing the decision of tourists to visit Almaty

are the presence of a large number of interesting places, well-developed infrastructure and affordable prices for this destination.

In addition, the author identified the main problems in the development of the tourism industry in the region: poor development of infrastructure outside the city of Almaty, deterioration and obsolescence of some places of residence for tourists, high prices for tourist services, heavy traffic jams within the city, lack of development of a year-round tourist season, weak marketing strategy, low awareness of tourist destinations and tourism in the region and few cultural events in the city.

Tourists in 2024 are more experienced, have enough funds allocated for the trip, have more free time, more and more tourists in the world are seeking to gain new experiences. Therefore, with the correct and high level of tourism development in the Almaty region and the city of Almaty, the region can become one of the most popular destinations among local and foreign tourists.

In general, the author of the work believes that for a still developing area that has already experienced a number of crises such as a pandemic, the level of industry development is on a good level. The dynamics of the development of the sector are positive and the direction is actively financed and developed by the government of the country. The author proposes to conduct a similar study in 5 years and observe changes in the dynamics and level of tourism development in the region.

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9 Appendix

9.1 Questionnaire survey

1. Where are you from? (City, country) / Откуда Вы? (Город, Страна)*

Your answer

2. What is your gender? / Какой у Вас пол?

Man / Мужчина

Woman / Женщина

3. How old are you? / Сколько Вам лет?*

18-24

25-34

35-44

45-54

55+

4. Do you like to travel? / Любите ли Вы путешествовать?*

Yes / Да

No / Нет

Find difficult to answer / Затрудняюсь ответить

5. How often do you travel? / Как часто Вы путешествуете?*

Several times a month / Несколько раз в месяц

Once a month / Раз в месяц

Several times a year / Несколько раз в год

Once a year / Один раз в год

- *Less / Реже*
 - *I don't travel / Не путешествоваю*
6. What type of holiday do you prefer? / Какой вид отдыха вы предпочитаете?*
- *Medical and recreational / Лечебно-оздоровительный*
 - *Cultural-historical / Культурно-исторический*
 - *Active-extreme / Активно-экстремальный*
 - *Ecological / Экологический*
 - *Shopping tourism / Шопинг-туризм*
 - *Gastronomic / Гастрономический*
 - *Beach / пляжный*
 - *Religious / Религиозный*
 - *Business / Деловой*
7. What type of accommodation do you prefer most? / Какой вид пребывания с целью туризма Вы предпочитаете больше всего?*
- *Stay at a hotel with all amenities / Пребывание в отеле со всеми удобствами*
 - *Stay with relatives or friends / Остановка у родственников или друзей*
 - *Rented housing / Съёмное жильё*
 - *Hostel / Хостел*
 - *Outdoor activities: camping, tents / Пребывания на свежем воздухе: кемпинг, палатки*
 - *Does not matter / Не имеет значение*
8. How do you usually organize your vacation? / Как Вы обычно организуете свой отдых?*

- *I buy ready-made vouchers and tours from travel agencies / Покупаю готовые путёвки и туры в туристических агентствах*
 - *I plan my vacation on my own, book hotels and explore attractions / Самостоятельно планирую отдых, бронирую отели и изучаю достопримечательности*
 - *I find out from friends, relatives and acquaintances about interesting places / Узнаю у друзей, родственников и знакомых об интересных местах*
 - *I don't plan anything / Ничего не планирую*
9. Have you ever been to the Almaty region? / Были ли Вы когда-то в Алматинской области?*
- *Yes, once / Да, один раз*
 - *Yes, two times / Да, пару раз*
 - *Yes, three times / Да, три раза*
 - *Other*
10. Have you ever been to the city of Almaty? / Были ли Вы когда-то в городе Алматы?*
- *Yes, once / Да, один раз*
 - *Yes, two times / Да, пару раз*
 - *Yes, three times / Да, три раза*
 - *Other*
11. If yes, for what reason were you there? / Если да, то по какой причине Вы там находились?
- *Leisure, Tourism / Отдых, Туризм*
 - *Family meeting / Семейная встреча*

- *Work, Business Meetings / Работа, Деловые встречи*
- *Cultural events, Concerts / Культурные мероприятия, Концерты*
- *Other:*

12. If yes, how long were you there? / Если да, то как долго Вы там находились?

- *One day / Один день*
- *Few days / Несколько дней*
- *One week / Неделю*
- *Two weeks / Две недели*
- *More / Более*

13. If you were, did you like your stay in the Almaty region, the city of Almaty? / Если были, то понравилось ли Вам находиться в Алматинской области, городе Алматы?

- *Yes, there is good infrastructure there / Да, там хорошая инфраструктура*
- *Yes, there are many interesting places to visit / Да, там много интересных мест для посещения*
- *Yes, it is easy and simple to book accommodation there / Да, там легко и просто можно забронировать проживание*
- *No / Нет*
- *Find difficult to answer / Затрудняюсь ответить*
- *Other / Другое*

14. Have you ever seen tourism advertising about this region? / Встречалась ли Вам когда-либо реклама туризма о данном регионе?

- *Yes, video advertising / Да, видео реклама*
- *Yes, advertising on posters / Да, реклама на плакатах*

- *Yes, advertising on the Internet / Да, реклама в интернете*
- *Yes, advertising on TV / Да, реклама по телевизору*
- *Yes, street advertising / Да, уличная реклама*
- *No / Нет*

15. Which of the listed attractions of the city of Almaty have you know? / Какие из перечисленных достопримечательностей города Алматы Вы знаете?*

- *Kok-Tobe / Кок-Тобе*
- *Sports complex and Medeo skating rink / Спортивный комплекс и Каток Медео*
- *Republic Square / Площадь Республики*
- *Park named after the First President / Парк имени Первого Президента*
- *Central State Museum / Центральный Государственный музей*
- *Ascension Cathedral / Вознесенский собор*
- *Memorial of Glory / Мемориал Славы*
- *Museum of Folk Musical Instruments named after Ykylas / Музей народных музыкальных инструментов имени Ыкыласа*
- *Kazakh National Opera and Ballet Theater named after Abai / Казахский национальный театр оперы и балета имени Абая*
- *"Almaty Arbat" / «Алматинский Арбат»*

16. Which of the listed attractions of the city of Almaty have you visited? / Какие из перечисленных достопримечательностей города Алматы Вы посетили?*

- *Kok-Tobe / Кок-Тобе*
- *Sports complex and Medeo skating rink / Спортивный комплекс и Каток Медео*
- *Republic Square / Площадь Республики*

- *Park named after the First President / Парк имени Первого Президента*
- *Central State Museum / Центральный Государственный музей*
- *Ascension Cathedral / Вознесенский собор*
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- *"Almaty Arbat" / «Алматинский Арбат»*

17. Which of the listed attractions of the Almaty region have you know? / Какие из перечисленных достопримечательностей Алматинской области Вы знаете?*

- *Lake Kaindy / Озеро Каинды*
- *Charyn Canyon / Чарынский каньон*
- *Ayuly waterfall / Водопад Аюлы*
- *Lake Issyk / Озеро Иссык*
- *Saki mounds / Сакские курганы*
- *Big Almaty Lake / Большое Алматинское озеро*
- *Ile-Alatau National Park / Иле-Алатауский национальный парк*
- *Altyn-Emel National Park (singing dunes) / Национальный парк "Алтын-Эмель" (поющие барханы)*
- *Tamgaly-Tas / Тамгалы-Тас*

18. Which of the listed attractions of the Almaty region have you visited? / Какие из перечисленных достопримечательностей Алматинской области Вы посетили?

- *Lake Kaindy / Озеро Каинды*

- *Charyn Canyon / Чарынский каньон*
 - *Ayuly waterfall / Водопад Аюлы*
 - *Lake Issyk / Озеро Иссык*
 - *Saki mounds / Сакские курганы*
 - *Big Almaty Lake / Большое Алматинское озеро*
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 - *Tamgaly-Tas / Тамгалы-Тас*
19. Do you consider the city of Almaty and the Almaty region to be good options to visit? / Считаете ли Вы город Алматы и Алматинскую область хорошими вариантами для посещения?*
- *Yes, there are many interesting sights there / Да, там много интересных достопримечательностей*
 - *Yes, there are a lot of interesting events there / Да, там много интересных ивентов*
 - *Yes, there are comfortable and affordable types of accommodation / Да, там удобные и доступные виды проживания*
 - *Yes, there is good infrastructure there / Да, там хорошая инфраструктура*
 - *No / Нет*
 - *Other / Другое*
20. Would you recommend someone to visit this region? / Посоветуете ли Вы кому-то посетить данный регион?*
- *Yes, I will recommend it to all / Да, буду советовать всем*

- *Yes, I will advise people with a good income, because it's expensive there / Да, буду советовать людям с хорошим доходом, т.к. там дорого*
- *Yes, I will advise people with middle and low incomes, because it's inexpensive there/ Да, буду советовать людям со средним и низким доходом, т.к. там недорого*
- *No / Нет*
- *Find difficult to answer / Затрудняюсь ответить*
- *Other / Другое*

21. Are you satisfied with the current stage of tourism development in this region? / Устраивает ли Вас нынешняя стадия развития туризма в этом регионе?*

- *Yes, it is well developed / Да, она хорошо развита*
- *Yes, but it needs to be further developed / Да, но её необходимо развивать дальше*
- *Yes, but its level is not good enough / Да, но её уровень не достаточно хорош*
- *No, it needs to be developed / Нет, её необходимо развивать*
- *No, its level is bad / Нет, её уровень плохой*
- *Find difficult to answer / Затрудняюсь ответить*

22. Why did you answer yes, no, I find it difficult to answer? / Почему Вы ответили да, нет, затрудняюсь ответить?*

Your answer

23. What would you like to change or add for the successful development of tourism in the Almaty region? / Чтобы Вы хотели изменить ли добавить для успешного развития туризма в Алматинской области?

Your answer