

STUDY OF THE CURRENT STATE AND PROSPECTS FOR THE DEVELOPMENT OF TOURIST FLOW IN THE CITY OF ALMATY, KAZAKHSTAN

Assan ZHELDIBAYEV 

Almaty Technological University, Faculty of Economics and Business, Department of Tourism and Service, Almaty, Kazakhstan, e-mail: zheldibaev.asan@mail.ru

Yernur KULAZHANOV 

Almaty Technological University, Faculty of Economics and Business, Department of Tourism and Service, Almaty, Kazakhstan, e-mail: kulazhanov.y@gmail.com

Aitolkyn MOLDAGALIYEVA 

Al-Farabi Kazakh National University, Faculty of Geography and Environmental Sciences, Almaty, Kazakhstan, e-mail: moldagaliyeva.aitolkyn2016@gmail.com

Nazym ABDILDAYEVA 

Almaty Technological University, Faculty of Economics and Business, Department of Tourism and Service, Almaty, Kazakhstan, e-mail: naz.milady@mail.ru

Kairat ZHOYA 

Kazakh National Women's Teacher Training University, Institute of Natural Science, Department of Geography, Almaty, Kazakhstan, e-mail: kairat.altai82@gmail.com

Kaster SARKITKAN 

Abai Kazakh National Pedagogical University, Faculty of Natural Sciences and Geography, Department of Geography and Ecology, Almaty, Kazakhstan, e-mail: kaster0102@mail.ru

Armanay SAVANCHIYEVA 

Abai Kazakh National Pedagogical University, Faculty of Natural Sciences and Geography, Department of Geography and Ecology, Almaty, Kazakhstan, e-mail: armanay75@mail.ru

Ardak ALDASHEVA 

Almaty Technological University, Faculty of Economics and Business, Department of Tourism and Service, Almaty, Kazakhstan, e-mail: aldashieva75@mail.ru

Maulken ASKAROVA 

Al-Farabi Kazakh National University, Faculty of Geography and Environmental Sciences, Almaty, Kazakhstan, e-mail: maulken@mail.ru

Liudmila PAVLICHENKO 

Al-Farabi Kazakh National University, Faculty of Geography and Environmental Sciences, Almaty, Kazakhstan, e-mail: lmp.170946@yandex.ru

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Abstract: Tourist flow has a positive impact on the economy, culture, environment and communities of countries and regions, making it a valuable asset and contributing to the development of historical sites, cultural heritage and traditions, attracting visitors interested in learning about local customs. Tourist flow stimulates investment in infrastructure such as transport, accommodation and tourist facilities, and improves the quality of life of local residents and visiting tourists. Therefore, the purpose of this study was to examine the current state and prospects for the development of tourist flow in the city of Almaty. The study was based on the statistical data of Almaty city for the last 10 years (2014-2023) and answers to the questions of the questionnaire for entrepreneurs. Statistical data were received from the National Statistical Bureau of the Republic of Kazakhstan and analyses were carried out from 19.01.2024 to 25.02.2024. Also in the study, we conducted a survey aimed at identifying the main problems of entrepreneurs in increasing tourist flow and selected the responses of 211 entrepreneurs (respondents). According to the results of the study, the number of foreign tourists arriving in Kazakhstan in 2014 was 679.0 thousand tourists, and in 2023 this figure increased to 1084.8 thousand tourists. Compared to 2022, the number of foreign tourists increased by 16.9%. The number of foreign tourists arriving in Almaty in 2023 was 261571 and domestic tourists were 710586. Thanks to inbound tourists, the share of tourism in the gross domestic product (GDP) of Almaty reached 11.3%. To increase the tourist flow to Almaty, it is first of all important to make the infrastructure more convenient and attractive for tourists. Thus, to attract more tourists from different regions and countries, it is necessary to invest in marketing and advertising campaigns and offer tours for active holidays such as

* Corresponding author

cultural events, culinary festivals, hiking and skiing. This study identifying the current status and prospects of tourist flow in Almaty city aims to improve the quality of tourism services, income, employment, and tourist flow and contribute to the literature.

Keywords: tourist flow, tourist demand, tourist supply, prospects of tourism development, Almaty, Kazakhstan

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INTRODUCTION

In a globalised world, the flow of tourism is not only a way for the population to enjoy sightseeing and historical sites, but also one of the most influential destinations involved in the competition and development process of a country. It is a ladder leading to the development of a nation and the emergence of many new enterprises (Kádár and Gede, 2021). Tourism as one of the most important sectors of the economy developed after Kazakhstan gained independence. And over the last ten years, the tourism industry has been rapidly developing. This is due to the fact that historical and cultural sights and unique architecture of Kazakhstan, attractive regions attract both domestic and foreign tourists (Tiberghien et al., 2018). Kazakhstan is currently integrating into the world community, i.e. neighbourhood with Russia, China, Kyrgyzstan and Uzbekistan will allow to develop cross-border tourism and implement joint mutually beneficial projects (Nezdoyminov, 2014). After all, Kazakhstan's geographical location, competitive advantages, uniqueness of tourist destinations, favourable tourist climate, hospitality, original culture, national cuisine, quality food products, support from the state allow Kazakhstan tourism to develop and arouse interest among potential visitors.

However, insufficient level of service, underdeveloped transport infrastructure, lack of qualified specialists, relatively high prices and the state of economic backwardness from developed countries restrain the development of tourism (Zhoya et al., 2024). It is also easy to see that COVID-19 has had a negative impact on the tourist flow to our country (Aktymbayeva et al., 2023). Kazakhstan lags behind other Central Asian countries in the tourism sector. Therefore, there is a need for promising projects and investments that will develop tourism in Kazakhstan and increase the inflow of tourists. In this regard, the President of our country Kassym-Jomart Tokayev in his address to the people said: 'It is necessary to comprehensively develop the country's tourism potential. Breakthrough projects should be realised in the sphere of tourism. Unfortunately, there have been no significant successes in this important sphere so far, and we are lagging behind other states' (Official website of the president of the Republic of Kazakhstan, 2023). On the way to solving these issues, the state concept 'Development of the tourism industry of the Republic of Kazakhstan for 2023-2029' was approved. The concept is based on the following: study of tourist flows in each region, identification of the main vulnerable places and their actualisation; development of tourist resources, formation of an effective system of promotion of the country's tourist potential in the domestic and international markets and creation of a favourable tourist climate (Concept for the development of the tourism industry of the Republic of Kazakhstan for 2023-2029, 2023).

Under the favourable geopolitical situation, Kazakhstan has all the prerequisites for the development of new tourist products, becoming a major player on the world tourist map, while possessing a unique natural diversity and preserving objects of historical heritage. Kazakhstan is a historical transport hub located along the Great Silk Road connecting the West and the East (Moldagaliyeva et al., 2024). Therefore, the main destinations of foreign tourists arriving in the country are historical places of Almaty, Taraz, Turkestan and Mangistau region (Issakov et al., 2023a). In addition, a large number of tourists come to East Kazakhstan region for the purpose of health improvement. It is necessary not only to come a lot in season, but also to increase the revenue part by creating programmes and unique forums for each season. The most convenient on the factor of location in the seasonal period is the city of Almaty (Yerdauletov et al., 2013). In this regard, taking into account the above issues, it is very important to scientifically study the tourist flows and important directions and prospects for the development of the city of Almaty. This is due to the fact that the development of new markets and segments, expanding the list of tourist services, improving the quality of tourist services and competitiveness, attracting domestic and foreign investors in the tourism business, increasing the level of income and employment of the population, ensuring the affordability of the tourist product for groups of residents and non-residents and properly developed marketing strategy give an impetus to the growth of tourist flow and contribute to its development, open the ways.

Therefore, the *purpose* of this study was to examine the current state and prospects of the development of tourist flow in the city of Almaty. As the tasks of the study were considered a review of the concept of tourist flow, the study of the state of development of tourist flow in Kazakhstan and promising directions for increasing tourist flow in the city of Almaty. This is because tourist flow is a statistical indicator describing the ratio of tourists to visitors in a certain area over a certain time, or a concept describing the movement of travellers between regions (Keum, 2010; Zieba, 2022). While the tourist flow index is an indicator that measures the number of visitors (arrivals/departures), managers are widely used for analytical purposes to assess the current state and performance of the tourism industry and to plan the development of this industry at the country, region or area level (Simonian et al., 2022). Quantitative and qualitative indicators of tourist flow undergo constant changes, contributing to the influence of a number of economic, political, social, geographical factors and natural conditions. That is, the tourist flow has a great impact on the economy, culture and social sphere of the passing countries (Peng et al., 2016). Therefore, in order to increase tourist flow in Kazakhstan, it is first of all necessary to organise comfortable air, rail and road transportation, develop a network of high category hotels at affordable prices, reduce prices for catering facilities and organise tourist excursions (Issakov et al., 2024). In particular, in the city of Almaty there is a high possibility to increase the flow of tourists due to the quality service of specially protected landscapes and objects of natural and cultural heritage and recreation parks.

Nevertheless, despite the fact that in recent years Kazakhstan has been interested as a new tourist destination in the European and Asian tourist markets, the number of foreign tourists visiting the country is not increasing. Thus, while in 2021 the number of foreign tourists arriving in the country after COVID-19 was only 329.8 thousand tourists, in 2022 the figure was 927.8 thousand, which is roughly the same as in 2019 (National Bureau of Statistics, 2022). The largest number of foreign visitors were tourists who came to see the nature of the Zailiyskiy Alatau and the city of Almaty. Consequently, as part of this study, we have analysed the statistical indicators of tourist visits to the city of Almaty, while considering the statistical indicators of tourist flow of Kazakhstan for the last 10 years (2014-2023).

As a result of the survey, the main problems and directions for further development of local entrepreneurs working in the tourism sector to increase tourist flow were identified. In particular, the importance of improving the city's transport infrastructure; attention to and improvement of the quality of services; co-operation with local travel agencies; formation of convenient and accessible routes for tourists; promotion of events and festivals reflecting the culture of the Kazakh people and establishment of partnerships at the international level were highlighted as priority areas for increasing tourist flow in Almaty. Thus, this study, by examining the current state and prospects of tourist flow in Almaty, aims to improve the quality of tourism services in Almaty, attract domestic and foreign investors in the tourism business, increase population income, employment, tourist flow and contribution to science.

LITERATURE REVIEW

The literature review shows that tourism flow-an essential basis for understanding the relevance of the barriers identified in the course of tourism supply and demand shaped through the supply and demand coming to the tourism centre within a country's territory. Tourist flow-determines the exact level of demand for what mission or facility people are interested with (Zeng and He, 2019). Specifically, to help researchers and experts in tourism industry activities to assess the impact of tourism flow on the region's infrastructure, forecast tourism trends, development situation and develop strategies to improve the tourism industry (Belgibayeva et al., 2020). *Tourism offer* - is a tangible good and service provided to the consumer in a tourism centre (Della Corte et al., 2015). These include: sightseeing tours of the country; organised cultural carnivals; scuba diving or liner cruises; active Extreme holidays: Mountaineering, wakeboarding, skydiving, kitesurfing, rafting, rock climbing and safaris; unique protected nature reserves; local culinary gastronomic tours and good high-end restaurants; shops that return to the city; health and medical clinical tourism; touring galleries and beach resorts dedicated to archived architectural interests (Nikitinsky, 2007; Issakov et al., 2023b).

In particular, water-based forms of tourism provide potential opportunities for regions and contribute to community economic growth, increased tourist trips, and local revenues (Rahmat et al., 2023). A *tourism demand* is the purchase or acquisition of a commodity that is economically secured by the consumer's money and attracts the consumer's attention (Sun et al., 2020). Tourist demand is formed under the influence of various objective and subjective aspects. Domestically, the following tasks are solved: pre-booking of air tickets, transfers, eco-hotels, search and booking of convenient modes of transport for the road; demand for well-known famous museums, natural monuments and other attractions, such as exhibitions; purchase of ready-made tour packages with a focus on city tours; shopping centres located in the recreation area increase demand for goods through shopping, which ultimately contributes to the development of trade and tourism industry in shops; participation in organised entertainment events (Ulucak et al., 2020; Alreahi et al., 2023).

The most important driver of tourist flow is the systematic operation of supply and demand (Zhang et al., 2021). In addition, due to the ratio of consumers and suppliers, the intensity of tourist flow will increase (Gidebo, 2021). The formation and increase in the number of tourist flow is influenced by a number of factors, which include: the economic intensity of the gross domestic product, the degree of income of the population, the process of inflation and deflation, the exchange rate, the required value of tourist services; political aspects-stability of the political climate, domestic and international relations, visa procedures and embassy exchange; technological factors-online booking in accordance with world standards, development of transport infrastructure, updating of logistics (Ivanova and Krastev, 2022).

Due to the specificity of tourist flow, world scientists have several theories. For example, according to the theory of seasonality, if more tourists come to the country in the summer months, the number of flows is less in the winter months. Therefore, holidays in winter time should attract tourists (Zvaigzne et al., 2022). Furthermore, the theory of cultural exchange, i.e. increasing interest in the cultural life of another population, helps to attract the attention of tourists to the country (Coulson et al., 2014). Certainly, the beginning of the journey starts with the first chosen place of rest, that is, having arrived in a certain centre, the tourist will switch his attention from there to other objects. It is worth noting that in most cases, tourists rush to countries with developed economies, good infrastructure and quality of service, and normal economies.

This has been stated in many scientific papers: Mertzanis and Papastathopoulos (2021), Aktymbayeva et al. (2020), and Kozbagarova et al. (2022). However, of particular note is Zhumabayev (2009) "Tourist flow in Kazakhstan: problems and prospects for development", Kenzhebekov et al. (2021) "Foresight of tourism in Kazakhstan: Experience economy", Niyazbayeva and Yessengeldina (2016) "Analysis of tourism cluster development: Kazakhstan experience", Koshim et al. (2023) "Sustainable development of ecotourism in 'Altynemel' National Park, Kazakhstan: Assessment through the perception of residents" and Iskakova et al. (2021) "The Natural and Recreational Potential of Kazakhstan for the Ecological Tourism Development" are very valuable studies on the changes in tourism flow and the tourism industry in Kazakhstan as a whole. Currently, tourism and tourist flows are diverse in countries around the world, including countries with well-developed tourism. Based on research and various ethical standards, tourist income and expenditure are categorised. Firstly, tourist flow is most directed to destination regions. An example of this is Türkiye, a country with a high tourist flow. Türkiye

considers tourist flows as a source of economic development, job growth and exports (Karagöz et al., 2022). Meanwhile, the destination attraction (attractions and attractions) takes centre stage as a major factor in attracting tourist flow (Tekin, 2015). Tourist attractions are key elements of tourism development in destinations, therefore they are considered one of the most important factors supporting the development of local tourism. Attractions as an important focus of tourism activities influence tourists' travel decisions. Second, the spatial distribution of tourism enterprises - examines the overall structure and composition of tourism and the presence of clusters in strategic economic zones and resource advantages (Askeyev and Baizholova, 2021). The researchers found an imbalance in tourism development by examining disturbances in the distribution of tourist visits. That is, it was observed that the spatial distribution of tourists has a negative impact on the development of the flow (Ayapbekova and Demeuov, 2019).

Thus, in recent years, the state of international tourism development has expanded significantly around the world and contributed to the rapid growth of tourist flows. Nowadays, international tourism has become a means of communication between the tourist flows of countries in realising methods of transforming a previously closed society into an open and accessible one. Tourism flow, according to the content of the results of various studies, provides insights on how to increase tourist flow and tourism profits in tourist destinations around the world. Systematic reviews provide objective, replicable, systematic and comprehensive coverage of the determinants of tourism flow, and provide the formulation of the concept of tourism flow, the identification of relevant works and the interpretation of actual statistical findings and results.

MATERIALS AND METHODS

Despite the fact that the city of Almaty is very rich in attractions, the transformation of attractions of this nature into tourist attractions has not yet been fully realised. The tourism sector as an important direction in the development of the economy, historical and cultural sights and wild nature of Almaty increase the tourism potential of the city (Issakov et al., 2023c). As already mentioned, the tourism potential of the country is very high. The city of Almaty and its districts are rich in recreational and tourist resources, especially the character of the Zailiyskiy Alatau, recreational and sanatorium resorts, the presence of green areas in the eastern zone of the city provide accelerated development of tourism. The city of Almaty is the largest educational, scientific, financial centre of Kazakhstan, the largest metropolis of Kazakhstan and one of the largest tourist centres of Kazakhstan (Abdirazakov et al., 2023). The city is attractive for tourists with its cultural and architectural centres, historical heritage, beautiful nature and infrastructure. Therefore, the development of tourist destination in Almaty will create new jobs in the city and contribute to economic growth, development of other public spheres and attraction of investment preferences. In addition, it contributes to the exchange of cultural experiences with other tourist countries, strengthening international relations and enhancing the international prestige of the city. The city is also known for its historical monuments, parks, entertainment complexes, museums and various cultural events (Koshim et al., 2023). The following can be named as prerequisites for increasing the tourist flow in the city of Almaty (Figure 1).

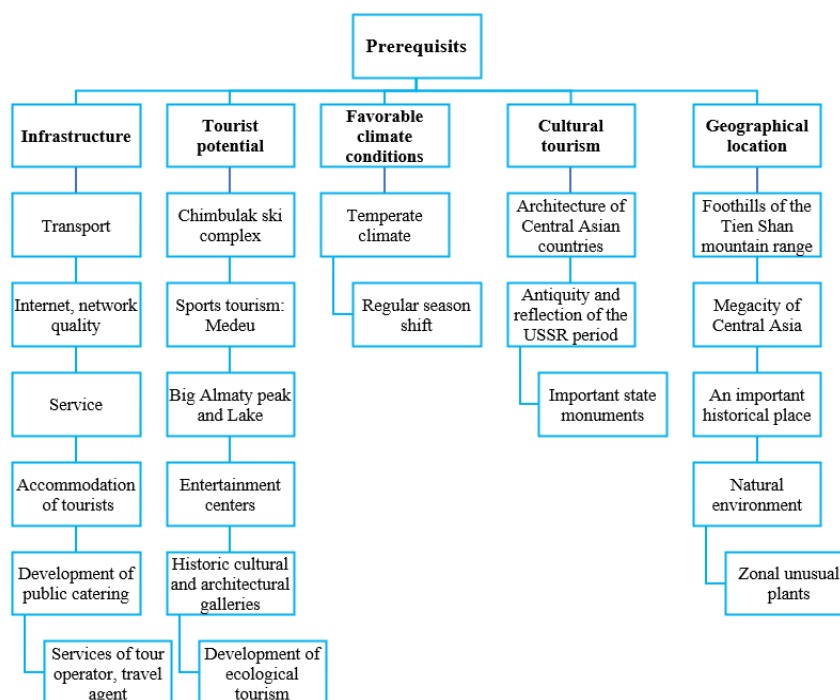


Figure 1. Prerequisites for increasing tourist flow in the city of Almaty (Source: Compiled by the authors)

Description of geographical prerequisites for the development of tourist flow in the city of Almaty: climatic conditions are favourable for the population, there is no strong heat or strong cold due to belonging to the temperate belt. That is, the presence of humid air masses throughout the year is better and more comfortable for the population in the summer period. This is most pronounced in the four seasons of the year, especially in spring and winter, when the city is particularly

beautiful. In addition, the mountain is a centre of tourism with extreme, natural, recreational and resort services. These include the Koktobe ice rink, the Medeu and Shymbulak ski resorts, recognised as holiday destinations for foreign tourists (Aldybayev et al., 2021). Also in the city of Almaty, there are many places of recreation, simultaneously attracting domestic and foreign tourists, both free and paid, located both in the centre and in remote parts of the city. For example: Park of the First President, Park named after 28 Panfilov Guardsmen, Botanical Garden, Family Park, etc.

However, being the most popular tourist region in Asia, the city of Almaty cannot increase the flow of tourists. Despite its favourable location in Central Asia, neighbouring Kyrgyzstan and Uzbekistan lag behind in tourism competition. Since it is important to find out the reasons for this, in this study we have analysed the statistical indicators of tourist flow for the last 10 years (2014-2023). Statistical data are obtained from the National Statistical Bureau of the Republic of Kazakhstan, and the analytical work was carried out from 19.01.2024 to 25.02.2024 by the teaching staff (research group) of Almaty Technological University. Moreover, in the study, we conducted a survey to identify the main challenges faced by local entrepreneurs to increase tourist flow. The survey questions were compiled as a result of literature review and <https://docs.google.com> with the help of. The survey questions were compiled from the literature review and responses were obtained from docs.google.com. The survey questions (Q) were as follows:

- Q 1. What is your gender?
- Q 2. How old are you?
- Q 3. Your education?
- Q 4. What travel industry do you work in?
- Q 5. How many years have you been a travel entrepreneur?
- Q 6. Who are the main customers who come to your establishment?
- Q 7. What percentage of tourists visiting your enterprise are foreign tourists?
- Q 8. How many services (products) on average does one tourist (consumer) receive from your enterprise?
- Q 9. What, in your opinion, are the most urgent problems for foreign and domestic tourists coming to Almaty?
- Q 10. What is the main purpose of tourists visiting Almaty?
- Q 11. What impact has the COVID-19 pandemic had on your company?
- Q 12. From which region do the most tourists come to your business?
- Q 13. Which destination do you think will have a high tourist flow in the future?

The survey was aimed at identifying the problems of entrepreneurs of Almaty city, working in the sphere of tourism, a total of 214 respondents took part in it. Responses to the questionnaire were received in the period from 01.03.2024 to 01.04.2024, and its selection in accordance with the requirements lasted a week.

The selection of the responses received as per the requirements of the research work resulted in 211 responses. 28.9 % of the respondents were males and 71.1 % were females. In the course of the research, the main problems of entrepreneurs were identified and relevant conclusions were drawn. Also priority directions for increasing tourist flow in Almaty city were proposed. The flowchart of this research in full is presented in Figure 2.



Figure 2. Research Flowchart (Source: Compiled by the authors)

RESULTS AND DISCUSSION

Analysis of statistical indicators of the tourist flow of Kazakhstan

As a result of the study, on the basis of statistical data, the indicators of tourist flow of Kazakhstan for the last 10 years were determined. Accurate data were obtained on the total number of tourists arriving in the country and from which countries. In particular, in 2014 the arrival of 679 thousand foreign tourists to our country was registered, and in 2023 this figure will increase to 1084.8 thousand tourists. For ten years, according to our observations, the number of flows described with the help of statistical expertise has changed by different (Table 1). Of these, 979.8 thousand tourists visited in 2019, and in 2020-2021 252.7 and 329.8. It follows that the impact of COVID-19 for Kazakhstan was negative.

Table 1. Dynamics of domestic and foreign tourist flow over the last 10 years (Source: Compiled by the authors based on the information of the National Statistical Bureau of the Republic of Kazakhstan, 2023)

№	Approved year	Number of domestic tourists (mln)	Number of foreign tourists (ths.)
1	2014	3.1	679.0
2	2015	3.1	692.2
3	2016	3.5	722.5
4	2017	4.4	891.9
5	2018	4.7	830.9
6	2019	5.3	979.8
7	2020	3.3	252.7
8	2021	5.1	329.8
9	2022	6.4	927.8
10	2023	9.7	1084.8

As shown in Table 1, the number of tourists visiting the country in 2022 was 927.8 and in 2023 this figure reached 1084.8 tourists. That is by 157 thousand tourists more than a year earlier, the growth was 16.9 % higher than in 2022. The countries with the highest number of tourists are Russia, Uzbekistan and Kyrgyzstan. The TOP 10 countries with arrivals in Kazakhstan by 6 months of 2023 include the following (Figure 3).

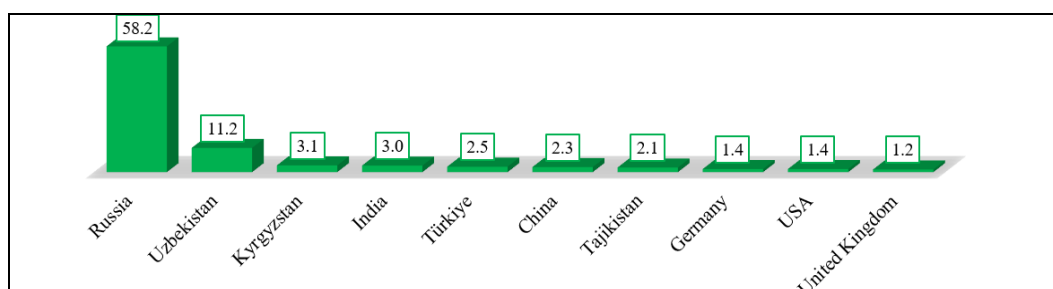


Figure 3. Number of tourists from TOP-10 countries, arrived in Kazakhstan for 6 months of 2023, thousand tourists (Source: Compiled by the authors based on the information of the National Statistical Bureau of the Republic of Kazakhstan, 2023)

The number of tourists arriving in Kazakhstan is 3/2 from Commonwealth of Independent States (CIS) countries, including Russia, Uzbekistan, Kyrgyzstan, followed by an influx of tourists from India, Türkiye, China, USA and several European countries. It can be observed that the number of foreign tourists has relatively fluctuated over the last 5 years, especially in 2023 when it was found that among the neighbouring countries, tourists from Kyrgyzstan and Uzbekistan are the most active. The quantitative indicators of the percentage of the statistical analysis of Almaty city for 2013-2023 are presented in Table 2. Thus, the results of the statistical analysis show that the flow of tourists visiting Almaty has increased over the last 10 years and the percentage contribution to GDP has increased. The high level of arrivals to Almaty is mainly from neighbouring countries, including Russia and Uzbekistan.

Table 2. Quantitative indicators of the tourist flow of Almaty city for 2013-2023 (Source: Compiled by the authors based on the information of the National Statistical Bureau of the Republic of Kazakhstan, 2023)

№	Quantitative indicators of tourist flow in Almaty city, (thousand tourists)	
	2013	2023
1	Tourists arriving in Almaty	
	583455	972157
2	Domestic tourists arriving in Almaty	
	456628	710586
3	Foreign tourists arriving in Almaty	
	126827	261571
4	Share of tourism in the GDP of the city of Almaty	
	0.3 %	11.3 %

Responses of tourism entrepreneurs to a questionnaire to identify the main issues for increasing tourist flows

At the second stage of the study, the results of the survey of entrepreneurs working in the tourism sector of Almaty were analysed. From the respondents, the answers of 211 entrepreneurs were selected as the results of the study. Among them the share of males was 29% and females-71%. In terms of age, young entrepreneurs aged 16-24 years accounted for 2 %, those aged 25-34 years accounted for 29 %, 68 % of respondents represented the ranks of entrepreneurs over 35 years of age, and 1 % of respondents belonged to entrepreneurs aged 45-63 years. In addition, 43% of respondents were citizens with secondary education, 41% with incomplete higher education and 16% of respondents with higher education. Currently, the city of Almaty has tourism diversity due to its natural, cultural, historical and socio-economic specifics. In particular, it was found that the majority of entrepreneurs work in the sphere of cafes (23%), hotels (20%) and restaurant business (18%) (Figure 4).

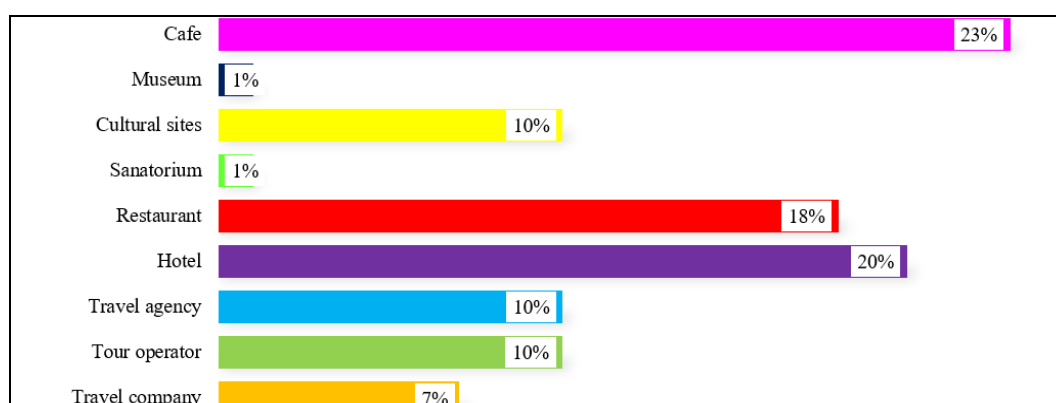


Figure 4. Main tourist destinations of respondents, %

It was also found that 57% of the respondents had been in the profession for 5 years since they started their profession, 30% of the respondents were 6-10 years and 10% of the respondents had been in the profession for 11-20 years since they started working as an entrepreneur. The remaining 3% of the respondents stated that they discovered and managed the profession 21-30 years ago. These results mean that despite the relatively small number of businesses operating for more than 20 years, a large number of new tourist destinations have opened in the last five years, which is one of the main reasons for the increasing competition. This competition has a direct impact on the development of tourist destinations, improving the quality of services and providing choice to tourists coming from abroad.

According to the answers of surveyed entrepreneurs, the main consumers are residents of the local city of Almaty (50%). Meanwhile, the flow of domestic (27%) and foreign (23%) tourists is at about the same level. Certainly, not all enterprises of Almaty city were able to analyse the answers of the main tourist destinations. Comparing with other cities of Kazakhstan, we can say that Almaty is the most visited place for domestic tourists. The purposes of visiting domestic and foreign tourists are different: for example, for business purposes, may be cognitive, cultural or educational. Nevertheless, the number of foreign tourists, who increase the inflow to the tourism industry and have a direct impact on the economy, was significantly lower than the number of local residents and domestic tourists. Specifically, unfortunately, the vast majority of enterprises (69 respondents) had only 10-20% of the total number of foreign tourists. While 38 (18%) enterprises participating in the survey responded that 30-40% of the total number of consumers are visited by foreign tourists (Figure 5). Thus, the main tourist flow in Almaty occurs at the expense of domestic tourists.

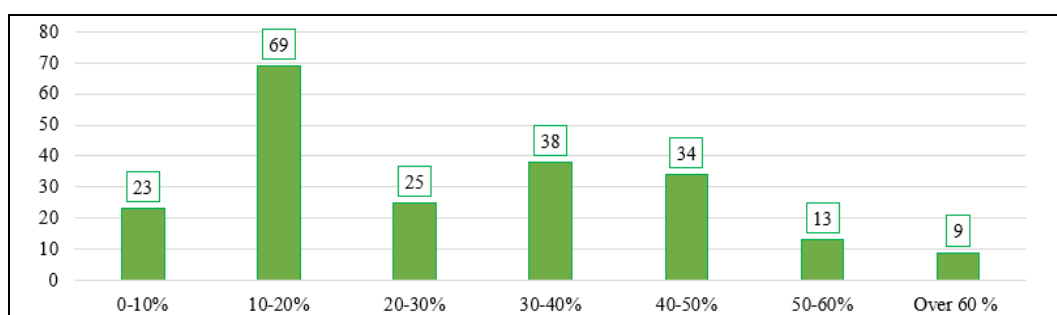


Figure 5. Respondent's answers to the question of what percentage of tourists visiting your enterprise are foreign tourists, N=211

As can be seen in Figure 5, the number of foreign tourists visiting respondents' businesses is not as high as the percentage. A total of 13 out of 211 respondents stated that 50-60% of the consumers would be foreign tourists, while 9 indicated that the percentage of foreign tourists visiting their enterprises is more than 60%. This indicates that these enterprises are popular with foreign tourists. The most important factor here may be not the price of the service, but the availability of exquisite dishes and services for tourists. At the same time, in the questionnaire we asked the question: 'How much on average one tourist (consumer) receives services (products) from your enterprise?'. As a result, in terms of the cost of services, 29% of respondents stated that one consumer spends between \$100-499, 22% stated that they receive services between \$500-999 and 19%-50-99 (Figure 6). Obviously, the amount consumers pay also varies depending on the type of tourism industry.

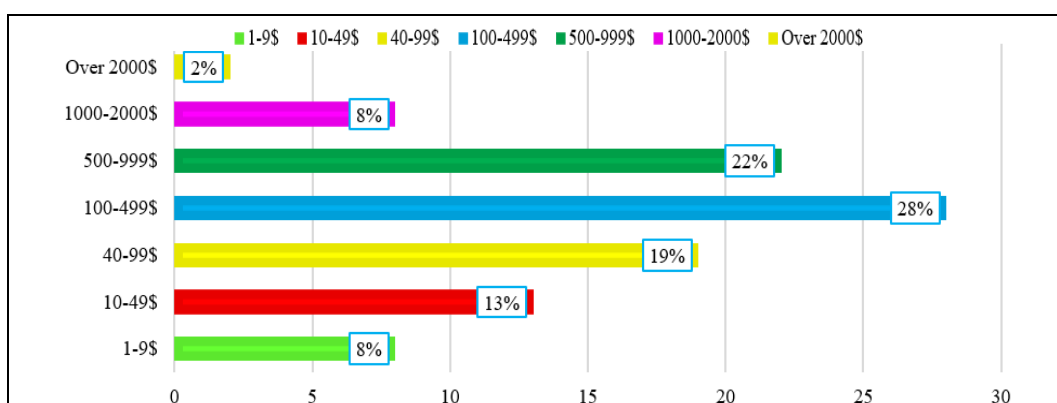


Figure 6. Cost of service received by one client on average, %

For foreign tourists travelling to Almaty, the main issues are the quality of service, the transport situation in the city and the remoteness of some tourist destinations from each other. In some cases involving international tourists, the language barrier was also seen as a major issue. The development of international tourism and the factors that increase or decrease transaction costs are directly influenced by the prevalence of common or informal language, the existing level of their (Sharma, 2018). Additionally, factors such as common borders, proximity of tourist areas, availability of convenient transport and landlockedness have a direct impact. Cultural and linguistic proximity plays a key role in international tourism (Seken et al., 2019). According to the data obtained during the survey, most tourists come to Almaty for business (31%), cultural and historical (27%) and cognitive purposes (22%). In addition, almost all young people who come to the

city come to study at universities (8%). The last place is occupied by tourists coming for medical and health-improving (8%) and religious (4%) purposes. The COVID-19 pandemic, which started in 2019, has led to a significant reduction in tourist flow across Kazakhstan and the world (Tankibayeva et al., 2023). Therefore, the respondents were asked: ‘How pandemic COVID-19 has affected your enterprise?’ the question was asked. According to its data, 38% of respondents answered that foreign tourists became few, and 17% of respondents said that the number of domestic tourists decreased significantly. In contrast, some destinations (18%) saw an increase in the number of consumers and an increase in the number of domestic travellers. Since the pandemic, 13% of respondents reported increased government requirements and 9% reported increased prices for services. Only 5% of businesses experienced food shortages. The impact of the COVID-19 pandemic affected almost all sectors of the tourism industry in Kazakhstan (Figure 7).

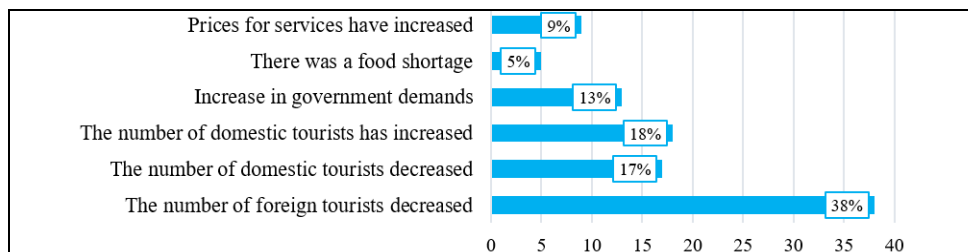


Figure 7. Impact of COVID-19 pandemic on tourist destinations, %

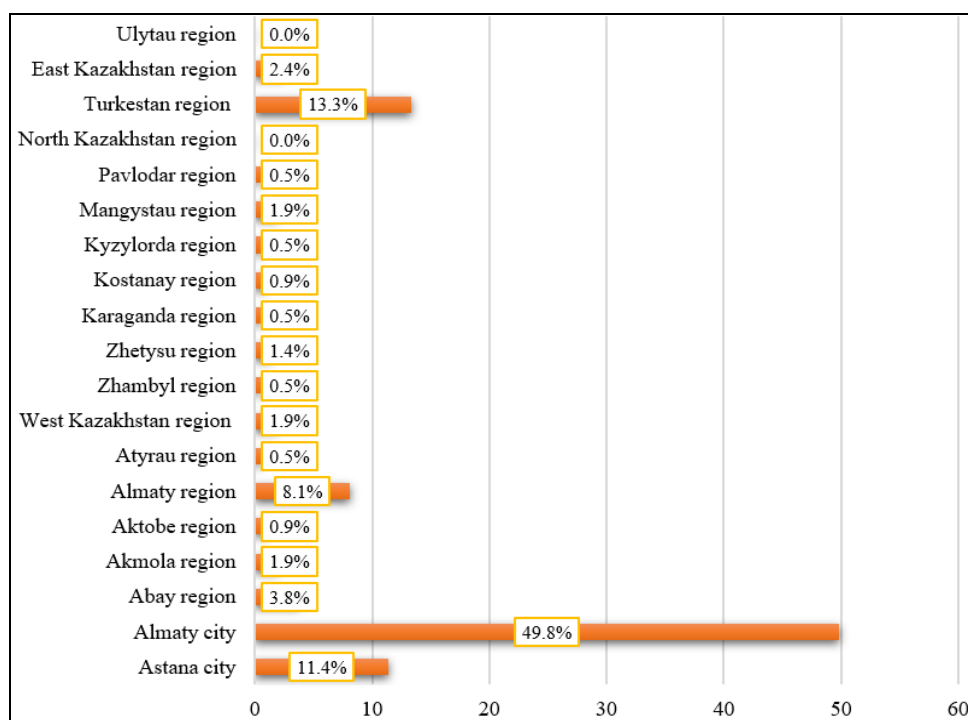


Figure 8. Main areas of consumers visiting respondents' enterprises, %

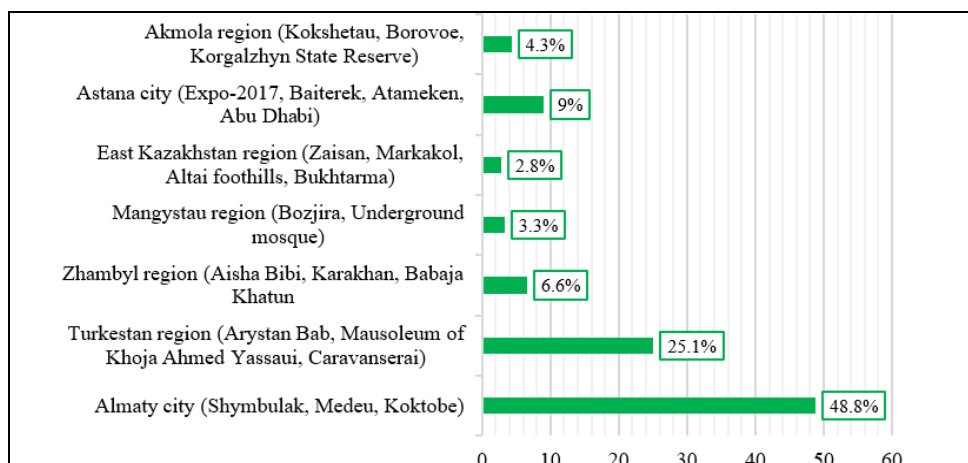


Figure 9. Regions in which, according to respondents, the increase in tourist flow will be observed in the near future, %

According to the results of analysis of entrepreneurs' answers to the survey, 49.8% of consumers visiting respondents' enterprises were residents of Almaty city, 13.3% - Turkestan region, 11.4% - Astana city and 8.1% - tourists from Almaty region. The following places were made up by tourists from West Kazakhstan region, Mangystau region and East Kazakhstan region (Figure 8). When asked which regions will see an increase in tourist flow in the future, 50% of respondents said that Shymbulak ski resort, Koktobe and Medeu skating rink in Almaty will be at the forefront. 25% of entrepreneurs believe that the tourist flow is currently growing rapidly Turkestan region (Figure 9).

One of the peculiarities of this region is a hotbed of tourism with historical orientation. This is due to the fact that the cultural heritage included in UNESCO: the mausoleum of Khoja Ahmed Yasawi, the mausoleum of Arystan Baba, the ancient cities of Otrar and Sauran, Akmeshit Cave and natural sites: Aksu-Zhabagaly, Karatau Reserve, Sairam-Ugam State National Park are unique places in the country, which are admired by tourists. In addition, the Keruen-saray complex, which is the visiting card of Turkestan City, is a centre of attraction for tourists, which has no analogues in Central Asia.

Priority areas for increasing tourist flow in the city of Almaty

Thus, as a result of analysing the results of statistical indicators of Almaty tourist flow over the last 10 years and questionnaires to identify the problems of entrepreneurs, several problems and priority areas requiring urgent solutions were identified. In order to positively address these problems, a number of the following activities should be carried out as soon as possible:

1. *Improvement of the city's transport infrastructure.* In order to improve the convenience of the airport and modernise public transport services in the city, to facilitate the movement of tourists around the city, it is necessary to pay attention to the condition of roads and increase the capacity of private transport. Through special investment in transport infrastructure by the government, the cost, accessibility and convenience of travelling tourists around the city can be improved (Khadaroo and Seetanah, 2007). Airfares to Kazakhstan are relatively overpriced compared to some tourist countries. Seasonal changes affect the high price (Myrzabekova et al., 2021). Firstly, the lack of competition between airlines in the country and fewer domestic airlines, which leads to a higher price. Secondly, the region in which our country is located also directly affects this price. One of the reasons for this is that the country is currently located quite far from the regions that receive the most tourist traffic and is landlocked. To solve this problem, it is necessary to increase competition between domestic airlines, increase their number if possible and establish effective partnerships with other airlines around the world.

2. *Improving the quality of services.* Improving the quality of services in tourist places in the city (hotels, rental houses), in eating places (cafes, restaurants) and in places of mass tourist visits. Providing tourists with the possibility of choice and thus increasing competition between tourist destinations. Continuous development and increasing the attractiveness of the city's cultural, historical and entertainment centres. Tourist places are becoming more and more popular, the contribution of social media in attracting tourists is high. Therefore, the beauty of a tourist destination directly affects how visitors create creative photos, videos and share them on social media. To properly demonstrate our hospitality to the staff working in this area, offer special training programmes that prepare friendly and experienced staff for tourists. Friendliness in social interaction with tourists directly affects the formation of the right attitude towards the country, nation.

3. *Co-operation with local travel companies.* It is known that the centre of mass visit of domestic tourists to the whole of Kazakhstan is the city of Almaty. Now the task is to create an effective partnership with local travel agencies and tour operators to increase the inflow of tourists to the city at the international level. It is necessary to create a database with information on the city, accurate information on tourist places, average prices in restaurants and shopping centres, efficient enough to be easily found on one website. Tracking the availability of data not only in English translation but also in other languages. Modern human ideology prioritises the convenience, ease and affordability of travelling (Cheyne et al., 2006). Therefore, based on demand, it is obvious that being able to make offers also increases the number of visitors. Creating special tour packages and providing detailed information is one of the measures to be considered along the way.

4. *Formation of a convenient and accessible marshmallow for tourists.* Despite the large number of significant cultural, historical and natural sights in Almaty and Almaty region, there are very few convenient routes connecting them (Batyrbekov et al., 2022). To solve this problem, in our opinion, the right solution is to create an integrated tourist package of tourist destinations. To develop inter-sectoral tourism Almaty needs to expand cooperation with nearby cities or natural tourist zones of Almaty region. Transport should be provided according to the developed itinerary.

5. *Promotion of events and festivals reflecting the culture of the Kazakh people.* Today, most tourists like to get acquainted with new, dissimilar cultures. For national holidays such as Nauryz meiramy, which are held annually in Almaty city, it is necessary to organise major festivals at the state level. To attract tourists interested in national culture, it is necessary to allocate public funds, encourage participation in local tourist events and often organise exhibitions in the national style reflecting the traditions of the Kazakh people. Accordingly, marketing strategies and promotional methods need to be developed to raise awareness among international tourists and reach the target audience (Rakhmetulina and Omurzakov, 2018).

6. *Establishing partnerships at the international level.* Obviously, one of the important steps will be to increase the inflow of tourists to Almaty internationally, as well as to establish partnerships with airlines and foreign travel agencies to increase efficiency. Currently, there is an exchange between CIS countries on the inflow of tourists to Kazakhstan (Mutaliev et al., 2020). In the context of globalisation, Kazakhstan is integrating into the world community. Neighbourhood with Russia, China, Kyrgyzstan and Uzbekistan, development of cross-border tourism and implementation of joint mutually beneficial projects. Kazakhstan's geographical location has a certain competitive priority.

In our conditions the uniqueness of tourist destinations, favourable climate, hospitable traditions, original culture, national cuisine, quality food products, support from the state are recognised as advantages and arouse the interest of potential visitors.

Recently, more and more foreign tourists have been coming to the beautiful city of Almaty, especially every year the number of holidaymakers admiring the nature of the Zailiyskiy Alatau is growing. Next, the Shchuchinsko-Borovsky resort district and the recreation area of Mangistau region were registered. In addition, Markakol, located in Eastern Kazakhstan, attracts attention with its amazingly beautiful nature, and Mangistau region surprises tourists with its picturesque gorges (Tokbergenova et al., 2023). In addition, the Turkestan region attracts tourists to several sacred-historical, ancient cities of Kazakhstan. Thus, tourism in Kazakhstan is developing more and more as it is one of the young industries. The cultural heritage of the Kazakh people, the richness of the natural landscape, unique territories are the most important features of a civilised society. Tourism has a great impact on social culture. Therefore, the development of the tourism industry leads to the formation of new jobs, an increase in the inflow of foreign currency into the state, the renewal of local transport infrastructure, including the development of communications and services. It also improves local, regional and international economic relations and contributes to the improvement of the environment. The development of the state's economy and the increase in inbound and outbound flow of tourists brings huge benefits in the phase of globalisation. Therefore, taking care of the future of tourism in Almaty, it is necessary to analyse and implement new programmes, new ideas and proposals. It is necessary to increase the tourist flow, remembering that growth in the non-resource market will help the country financially.

CONCLUSIONS

In conclusion, it was revealed that the current state of tourist flow in Almaty has increased in terms of indicators over the last 10 years. In particular, in 2014 the number of foreign tourists who visited the country was 679.0 thousand people, and in 2023 this indicator will be 1084.8 thousand tourists. The growth compared to 2022 was 16.9 %. The maximum number of tourists who visited Kazakhstan for 9 months was 58.2 thousand tourists from Russia, 11.2 thousand tourists from Uzbekistan and 3.1 thousand tourists from Kyrgyzstan. At the same time, the number of foreign tourists arriving in Almaty in 2023 totalled 261.571, while the number of domestic tourists reached 710.586.

Thus, the share of tourism in Almaty's GDP reached 11.3 %. In the course of this study, based on the respondents' answers, several key issues that need to be addressed to increase tourist flow to Almaty were identified. The importance of making the infrastructure convenient and attractive to tourists was identified as the main ones to increase tourist flow to Almaty. In addition, the need to invest in marketing and advertising campaigns to attract more tourists from different regions and countries was identified. Unique opportunities for outdoor activities and historical excursions such as cultural events, culinary festivals, hiking and skiing were also assessed to attract tourists to Almaty.

Quantitative and qualitative indicators of the tourist flow in the city showed the effectiveness of the use of tourist attractiveness, tourist potential based on the influence of a number of natural, economic, political, social, geographical factors. Comprehensive improvement of programmes and investment departments to be implemented by the state for the development of tourism industry will allow to develop tourism not only in Almaty, but also in Kazakhstan. In this regard, it is possible to co-operate with travel agencies by providing package tours and promotional offers to encourage tourists to come to Almaty. High-end hospitality services should also be provided so that tourists are left with a good impression.

However, it should be noted that tourism in Almaty mainly depends on seasonal factors, so the number of tourists and consumers fluctuates from time to time. In addition, the development of tourism in Almaty may contribute to environmental degradation, such as pollution and habitat destruction, and jeopardise the natural beauty and attractiveness of the city. Most dangerously, the rapid growth of tourism in Almaty may negatively affect the preservation of the city's cultural heritage and lead to the disruption of traditional customs. Thus, this study is aimed at improving the quality of tourism services, attracting entrepreneurs to the tourism business, increasing the income of the local population, employment rate, tourist flow, studying the current state and prospects of tourist flow in Almaty. This study has identified the following main issues that need to be addressed in Almaty: improving the infrastructure of Almaty; improving the quality of tourism services; co-operating with local tourism companies; creating convenient and accessible routes for tourists; promoting events and festivals that reflect the culture of the Kazakh people and establishing partnerships at the international level. Also, this study tries to contribute to Kazakhstani science by proposing the current state of development of tourist flow in Almaty, ways to solve the main problems of entrepreneurs.

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