

Problems and prospects of the territorial development of the tourism system in the Almaty region

Los problemas y las perspectivas del desarrollo territorial del sistema turístico en la región de Almaty

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ABSTRACT

Introduction: The tourism sector is recognized as an important sector of the economy of the Republic of Kazakhstan. As a member state of the UN, Kazakhstan integrates the Sustainable Development Goals (SDGs) into the State program for the development of the tourism industry. The incomplete implementation of the SDGs in Kazakhstan has causes of global and regional level. **Materials and Methods:** Statistical indicators for tourism in the Republic of Kazakhstan indicate a stable positive dynamics of the tourist flow in the country. The Almaty region has the highest rates of tourism activity, which has favorable historical, cultural and unique natural prerequisites. **Results and Discussion:** In the general tourist flow of the region, local tourism prevails. The indicator of inbound tourism in the Almaty region as a whole with the largest city of the Republic of Kazakhstan Almaty is the highest in the country. The target state setting for the prospective development of tourism assumes an increase in the share of tourism in the total GDP of the Republic of Kazakhstan by 2025 by 33%. **Conclusions:** In the study, in accordance with the concept of territorial and functional development of tourism and recreation in the Republic of Kazakhstan and the terminology of the urban planning direction, three key hierarchical levels of organization of tourist and recreational entities were formulated: regional, district, local – “tourist and recreational region”, “recreational agglomeration”, “tourist and recreational area”. The regional level corresponds to the Almaty tourist and recreational region, the recreational agglomeration - Taldykorgan and Almaty tourist and recreational agglomerations. Within the boundaries of the region, five tourist and recreational areas have been identified.



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1. INTRODUCTION

Identifying problems and determining the prospects for the development of any industry is a rather difficult task. In addition, the tourism industry is no exception. This requires an understanding of the main signals of the attractiveness of the environment: natural and artificial, as well as the motivation of the population in line with tourist and recreational activities. The scientific direction that studies the issues of the tourism sector is extremely important in the research field of the territorial development of any country ⁽¹⁾ ⁽²⁾. The tourism industry itself is one of the priority sectors of national economies and has a significant impact on the development of transport, construction, communications, agriculture, and the consumer sector ⁽³⁾.

In 2015, tourism ranked third in the world in terms of export earnings, accounting for 30% of service exports and one in every 10 jobs in the world ⁽⁴⁾. According to statistics in 2019, the share of the global travel and tourism sector was 10.3% of global GDP and ahead of the global economy in terms of growth: + 4.7% - travel and tourism versus + 2.5% – GDP ⁽⁵⁾. In 2021, the number of international tourists worldwide decreased by 1 billion, and financial losses by 1.0 trillion US dollars ⁽⁶⁾. However, in 2022, the rhythm of tourism activity in the world is gradually recovering.

For the entire global process of development of the tourism industry, the reference point for governments, design and management bodies in the field of tourism and culture of the member states of the World Tourism Organization (UNWTO) - 156 countries, is the concept of sustainable tourism. UNWTO is a specialized agency of the UN and is responsible for monitoring and promoting responsible, sustainable and inclusive tourism, aimed at achieving the UN Sustainable Development Goals (SDGs).

Tourism has been included as a target in Goal 8 - inclusive and sustainable economic growth, 12 - sustainable consumption and production, and 14 - sustainable use of the oceans and marine resources ⁽⁴⁾. In the report “The Sustainable Development Goals Report 2022” presents an analysis of the implementation of the SDGs ⁽⁷⁾. This report again noted the commitment to the fundamental principles aligned with the SDGs and the problems of implementation in the regions of the targets. Kazakhstan reached 17th place in the Global Peace Index and submitted a voluntary report, which notes that more than 50% of the SDG indicators are reflected in government plans and strategies ⁽⁸⁾.

Incomplete implementation of the goals in different countries has its own regional reasons. But there are also complex problems on a planetary scale. These include, first, the problems of global warming, the decrease in tourist activity due to COVID -19, which is visibly evidenced by the official statistics of key tourism indicators. The problems of global warming do not appear so quickly, but their consequences can be extremely destructive and will affect not only the development of tourism activities around the world, but also the life process of all mankind and nature in general.

Despite the global problems hindering the practical development of the tourism industry, the research field is replenished with prognostic publications. For example, an international team of researchers from the European Union, within the framework of the research project “European Tourism - Recent Developments and Future Challenges” for the TRAN Committee of the European Parliament, identified promising trends in tourism in Europe ⁽⁹⁾. First, attention is drawn to the increasing demand of visitors and the consequent shift towards sustainable and responsible tourism. Relatively new terms are used: “turistophobia”, “overtourism”. The same modern problem of mass character and excessive tourism, which is turning into a trend in the TOP-countries of the EU, experiencing excessive pressure from the international tourist flow during peak seasons, is also indicated in another publication that presents this particular aspect in more depth ⁽³⁾. This article notes that 2019 was the starting point in a number of European cities to introduce practical regulatory measures - limiting the daily/monthly or annual limit on the number of tourists. Whereas the discussion of this issue in the scientific literature began at the end of the twentieth century ⁽³⁾. Similar situations in urban, out-of-town tourism in unique natural places, undergoing a massive influx of visitors, create inconvenience for the local population, in case of a poorly regulated situation, create transport problems, and sometimes lead to landscape degradation. Similar problems are observed in many countries on a larger or smaller scale.

The second trend is associated with the active introduction of digital technologies in the tourism industry: the use of artificial intelligence and robotics, virtual and augmented reality, intelligent technologies – intelligent mobility, intelligent tourism branding ⁽⁹⁾ ⁽¹⁰⁾. The introduction of new technologies in the field of tourism is faced with the issue of studying predictive behavioral models of tourists, the history of which began in the second half of the 20th century. The conclusions of this kind of research are extremely important for territorial-functional forecasting and design. The subject of research was mainly the identification of motivational factors. In a publication highlighting the evolution of predictive behavioral models of tourists, it is noted that they are: perceived usefulness and ease of use, attitudes towards use. A review of sources on a similar topic allowed N. Gharibi to summarize the negative aspects of technology adoption patterns: motion sickness, physical rejection, cognitive overload and diffuse exhaustion that can create stressful situations ⁽¹¹⁾. The author emphasizes that the situation with COVID -19 has provoked a real revolution in

terms of technology. This, in turn, in the current situation of using a large number of technologies, complicates the task of predicting the behavior of tourist users and directly affects the correctness of decisions made by marketers, urban planners, and architects ⁽¹¹⁾.

As a third study for the TRAN Committee of the European Parliament, the trend of the last decade is to expand the industry as more specialized with the emergence of new niche markets: wellness or wellness tourism, eco-responsible, community-led tourism, vacation at home, travel for the elderly, multifunctional specialization - sacred + wellness, and in the longer term, the democratization of space tourism ^{(2) (9) (12)}.

2. MATERIALS AND METHODS

This study was based on an integrated approach and relied on the results of a functional and structural analysis of the placement of natural tourist and recreational resources, the existing tourist infrastructure, as well as field surveys of places and objects of tourism in the Almaty region. Empirical, graph-analytical methods were used to analyze the current situation regarding the location of tourist sites.

The search for review sources was based on the research questions, from which the following key phrases were formulated: “sustainable tourism”, “tourist resources”, “tourist preferences”, “tourist flow”, “promising tourism trends”. At the first stage, the following were included for consideration: global and regional databases of statistical data on the tourism industry, UNWTO reports and articles, publications in foreign and domestic rating scientific journals. The first key phrase “sustainable tourism” “outlined” the time range of publications in which the basic position was directly or indirectly adopted on compliance with the sustainable development targets adopted by the UN in 2015, supported by the entire world community. Further in the scope of this review, the key phrase “sustainable tourism” was used as the main criterion 1.

After performing an initial broad search of the word "sustainable tourism" in the most relevant research articles, the databases were searched for journal articles and Scopus journals were found to be relevant. This database was searched for articles in the “Journal of Tourism Futures”, “SPATIUM” and “Land use Policy”. On regional issues related to tourism, the search for policy documents, relevant research articles was carried out through the sites of legislative documents and the scientific database of regional universities RK ⁽¹³⁾. Articles in the state language of the Republic of Kazakhstan, Russian and English were considered acceptable for review. The search period was limited to 2017-2022. Only published articles were included in the review.

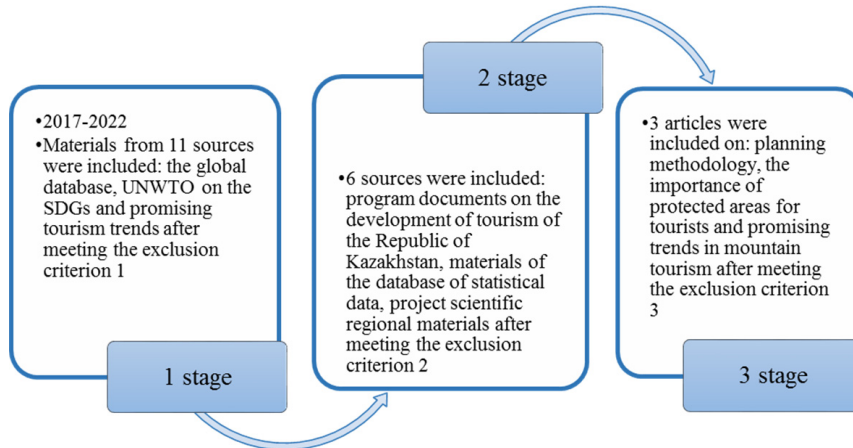
The criteria were analyzed in three stages. At the first stage, for consideration were only articles related to the following key areas are included: sustainable tourism, sustainable development targets, dynamics of tourist flows, future trends. Of the articles that were selected at the first stage, at the second stage those were included that related to the program priority areas for the development of tourism in Kazakhstan. The Information System was used - a database on tourism of the Republic of Kazakhstan in identifying the prevailing trends in the country in the development of tourist flows over the past decade. The third final stage of the study included articles specifying the main Targets of sustainable tourism, which addressed the issues of the methodological basis for strategic planning in the field of protection and development of territories with natural resources, cross-border cooperation in tourism activities and the sustainability of the branding of urban, out-of-town tourism in various periods of the negative impact of external factors. Articles that did not meet the inclusion criteria were excluded.

3. RESULTS AND DISCUSSION

3.1. Prerequisites and regional features of tourism industry formation in Almaty region

During the search, a database was created by excluding irrelevant articles over a 5-year period. After the selection of articles in three stages according to the inclusion and exclusion criteria, the total number of sources was 20. Articles that did not meet the selection criteria for publication dates and research questions were excluded Figure1.

Figure 1. Systematic review process



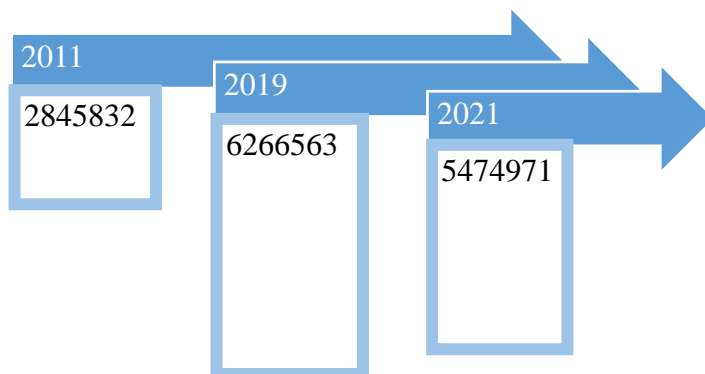
Source: compiled by authors.

UN SDG initiatives are integrated into the state programs of the Republic of Kazakhstan in various areas of development, into the “State Program for the Development of the Tourism Industry of the Republic of Kazakhstan for 2019-2025”, which put forward the main priority areas of tourism: agritourism, hunting and trophy, ecological, ethnographic, children and youth, medical, MICE tourism. As a target setting, the program includes the share of tourism in the total volume of GDP of the Republic of Kazakhstan, which is planned to be increased to 8%. This indicator for the current situation (for 2017) in the program is presented in the amount of 6%: direct contribution (1.9%), indirect (2.9%) and derivative (1.2%)⁽¹⁴⁾.

The purpose of the study, the main provisions and conclusions of which are presented in this article, was to develop proposals for the development of the tourism industry as an urgent economic and territorial planning problem of the Almaty region. Scientific research was carried out at the stage of pre-project analysis within the framework of the design development “Scheme of the territorial-spatial organization of the recreational and tourist industry of the Almaty region”⁽¹⁵⁾.

One of the objectives of achieving the goal was to conduct statistical analysis to identify prevailing trends. As part of the implementation of the program for the development of the tourism industry for 2019-2025, an official Information system was created – a database on tourism in the Republic of Kazakhstan. According to the database, from 2003-2021, there has been a stable positive dynamics of the tourist flow in the Republic of Kazakhstan in the country⁽¹⁶⁾. Over the past 10 years from 2011-2021, the growth of this flow amounted to 93% Figure 2-3.

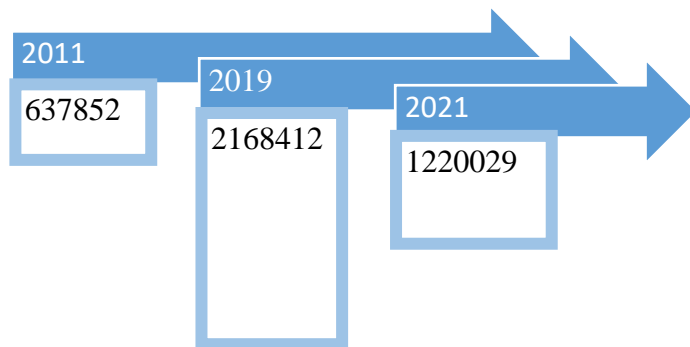
Figure 2. Number of visitors served at places of accommodation in the Republic of Kazakhstan, persons



Source: compiled by authors according to data⁽¹⁶⁾.

Whereas in the Almaty region as a whole with the city of Almaty, the growth of this indicator amounted to 187%. Representatives of inbound and local tourism form the general tourist flow. Some countries, having a high level of historical, cultural and natural potential, purposefully plan in the field of tourism, this sector of the economy, priority for international, inbound tourism.

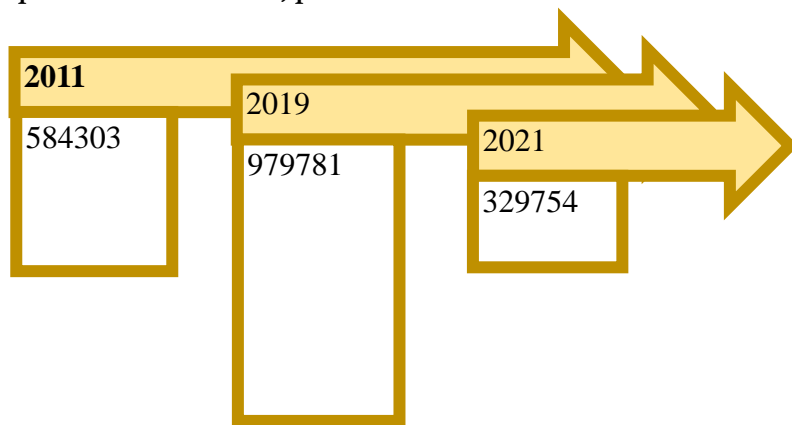
Figure 3. The number of visitors served in places of accommodation in the Almaty region as a whole with the city of Almaty, persons



Source: compiled by authors according to data ⁽¹⁶⁾.

There are world statistics that each foreign tourist spends an average of 20 US dollars per hour and thus “forms” one job ⁽¹⁴⁾. But as noted above, for some countries, these priorities in the structure of the tourism industry have led to the problem of “overtourism”. In Kazakhstan, the share of the flow of foreign tourists in 2019 was only 18%, while in 2021, after the period of the COVID 19 pandemic, this figure dropped sharply to 6%. In the Almaty region as a whole, with the city of Almaty, it is higher than in Kazakhstan: 2019 – 25%, 2021 – 10% Figure 4-5.

Figure 4. Number of visitors served by accommodation places for inbound tourism (non-residents) in the Republic of Kazakhstan, persons



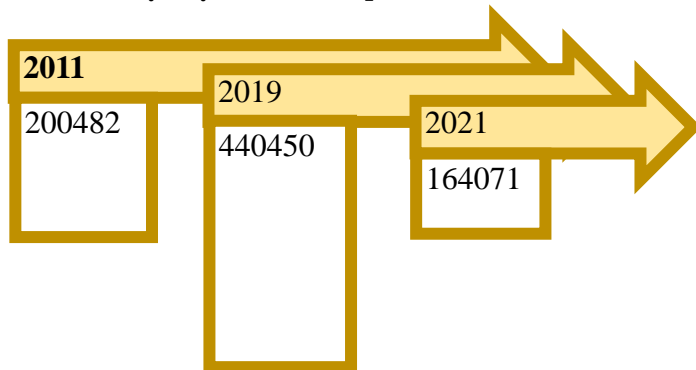
Source: compiled by authors according to data ⁽¹⁴⁾.

Almaty region is located in the southeastern part of the Republic of Kazakhstan and occupies an area of 223.9 thousand square meters ⁽¹⁵⁾.

The top ten areas of tourist activity in the Republic of Kazakhstan include four territories of the Almaty region:

- 1) Lake Alakol – with a potential of 2,500,000 tourists per year (current flow - 1,019,575 tourists per year);
- 2) Mountain cluster of the Almaty region - with a potential of 2,500,000 tourists per year (current flow - 500,000);
- 3) Lake Balkhash - with a potential of 400,000 tourists per year (current flow - 130,000);
- 4) Entertainment tourist hub ICBC “Khorgos” - with a potential of 22,600,000 tourists per year.

Figure 5. Number of visitors served by accommodation places for inbound tourism (non-residents) in Almaty region and Almaty city as a whole, persons



Source: compiled by authors according to data ⁽¹⁴⁾.

The presence of 4 points from the TOP-10 tourist sites of the Republic of Kazakhstan indicates the importance of the Almaty region in the development of the tourism map. These destinations are identified as key areas for tourism development, each of which has its own identity, characteristic products/market development potential. In addition to those presented in the TOP-10, the region also presents other interesting products: wine and trout farms, sanatorium and health-improving cluster Chundzha, etc.

The most developed infrastructure with unique sports, historical and cultural facilities of world importance and attractive in terms of scenic beauty and biodiversity of natural resources is the Almaty cluster with the country's largest tourism center city of Almaty (2 million 60 thousand inhabitants). Along with historical and archaeological monuments, the territory of the Almaty region has unique sports and recreational and resort and recreational resources in terms of tourism potential; there are cultural agrolandscapes for the successful development of agrotourism.

The structural basis of this latitudinal cluster is the mountain system of the Zailiysky Alatau. Along it is a network of historical settlement, along which the route of the Great Silk Road passed. But even with such favorable natural and historical prerequisites, the territorial and functional development of tourism is hampered by a number of problems:

- the situation of “excessive” tourism during peak days and seasons occurs at the highest mountain complex in the world – the Medeo skating rink, located at an altitude of 1691.2 meters above sea level. The uniqueness and attractiveness of the modern sports complex for residents of the city of Almaty and tourists lies in the eight-month duration of the operation of an open skating rink against the backdrop of dynamically changing landscapes of three mountain ranges;
- overload of transport infrastructure on peak weekends: the distance from the city of Almaty to the Medeo sports complex is 25 km, the flow of public and private transport overcomes only in 2-3 hours;
- low degree of equipping of hiking trails and places of short-term rest;
- undeveloped transport inter-settlement corridors with roadside recreational complexes, the transcontinental corridor Western Europe - Western China;
- the spatial arrangement of countryside places for affordable tourism has not been resolved;
- insufficient promotion of Kazakhstan in the world tourism market.

The formation of the concept of a promising territorial-spatial organization of the recreational and tourist industry of the Almaty region was accompanied by the adoption of a position on the allocation of three levels of territorial organization of tourist and recreational entities in accordance with the terminology of the urban planning direction: regional, district, local.

The regional level corresponds to the Almaty tourist and recreational region; the district level includes two tourist and recreational agglomerations - Almaty and Taldykorgan; local level - 4 large tourist and recreational areas: North-Tyanshan, Zharkent-Taldykorgan, North-Zhungar, Ili. All these tourist and recreational areas have a variety of informative historical and cultural monuments, natural attractions and are “strung” on the section of the historical route of the Silk Road (Almaty segment) and the modern transcontinental corridor Western Europe-Western China.

The distribution of resources is reflected in the nature of the development, planning and functional organization of territorial and recreational areas. The predominant directions and types of recreational activities are sports and recreation, mountain-specific, balneological with the potential of cognitive resources. The mountain landscape was rated as the highest indicator of attractiveness, in connection with this, ecotourism was adopted as the leading form of tourism for the North Tien Shan, Zharkent-Taldykorgan and North Zhungar regions, contributing to the maintenance

of sustainable tourism in accordance with the SDGs. In the study, much attention is paid to identifying regional features of the formation of agro-ecotourism, the formation of which in Kazakhstan is at the initial stage of development. Agro-ecotourism, as well as all types of tourism in the Almaty region, can be greatly influenced by such a negative external factor as possible global warming. At the regional level, scientists of Kazakhstan are conducting research to identify natural and climatic trends: changes in temperature, runoff of Mountain Rivers in the south of Kazakhstan. For example, according to changes in the temperature regime, it was concluded that since 1850, over 166 years, the temperature has increased in South Kazakhstan by an average of 0.27 °C per decade, while over the past 30 years it has increased by 0.44 °C ⁽¹⁷⁾. In connection with this research topic, regional scientific journals present the results on the dynamics of the glacial runoff of the rivers of the Northern slope of the Ile-Alatau and identify trends in the further evolution of glaciation in this area ⁽¹⁸⁾.

For the prospective development of the tourism industry in the Almaty region, Goal 17 - Partnerships for the Goals is quite relevant. The relevance of this issue for the region in principle positions is also indicated in regional scientific publications (Sansyzbayeva, 2021). In the east, the region borders on the PRC (XUAR), in the south on the Republic of Kyrgyzstan. In this regard, cross-border partnership through the joint use of mountain tourist destinations is embedded in the concept of tourism development. In addition, already in the summer of 2022, a hiking mountain route from the territory of the region to Kyrgyzstan was opened with a final destination on the picturesque Issyk-Kul Lake.

All the main provisions presented on the regional features of the Almaty region were developed as part of the project documentation "Scheme of the spatial organization of the recreational and tourist industry of the Almaty region" ⁽¹⁵⁾. In May 2022, by decree of the President of the Republic of Kazakhstan, the administrative-territorial division of a number of regions of the country was adjusted. The Zhetysay region was alienated from the Almaty region, and the center of the region was transferred to the city of Konaev (former Kapshagay). Accordingly, the area of the Almaty region was reduced by 47% to 105,263 sq. km. These administrative changes will entail in the coming years the adjustment of project documentation for the new composition of the Almaty region, but the main principles of the territorial and spatial organization of tourism for adjacent administrative units presented will be relevant in the coming years.

At the pre-project stage, a review of scientific articles was also carried out, highlighting the regional features of the methodological basis for the strategic planning of the territorial development of tourism in similar natural and climatic conditions. The leading natural tourist resource in the Almaty region is the Zailiysky Alatau mountain range, unique in its attractiveness. In this regard, articles that explore the prospects for the development of tourism in mountainous areas, in particular Serbia, were selected for analysis.

Just like in the Almaty region, most of the mountainous regions of Serbia are represented by specially protected natural areas, therefore, a significant part is allocated to nature protection in the issues of the long-term development of the tourism system. In an article by a group of scientists from the Institute of Architecture and Urban and Spatial Planning of Serbia, the problems of the past decades at the beginning of the 20th century are noted, which consist in the discrepancy between the normative and real protection of specially protected natural areas (SPNA). The problems of protecting such territories in this period were also characteristic of Kazakhstan. For example, on the territory of the most picturesque Ile-Alatau State National Natural Park, located in the zone of influence of the city of Almaty, it was planned to implement a mega-project of a world-class mountain-skiing complex within the boundaries of the Kok-Zhailau tract (absolute altitude - 1450-1740 m above sea level). In this case, the unjustifiably overestimated design indicator of visits to the complex and the recreational capacity of the landscape came into conflict. And only public hearings made it possible to stop the implementation of this project.

The result of the study by Serbian scientists of the territorial plans of the country's protected areas of the last decade was an assessment of the applied methodological framework, according to which, first, the implementation model for the protection of the territory and the planning model for the implementation of a technical nature (with a level of detail - accommodation of tourists, tourist infrastructure, etc.) are considered separately. It is emphasized that the reduction of conflicts between local needs and the protection of natural resources will contribute to the realization of benefits for the local community through its participation in the protection of nature, the promotion of local products, the development of skills and the formation of a balance between tourism and other economic activities. With regard to the methodological foundations for the protection and development of protected areas, it was concluded that the integrated planning methodology analyzed in the spatial plans of iconic protected areas in Serbia can be further improved in terms of monitoring its implementation ⁽¹⁹⁾. Another article by a researcher of this region provides an analysis of the main trends in mountain tourism in the Alpine countries. It is emphasized that since the beginning of the twentieth century, a gradual decline in interest in high-altitude resorts (over 1500 m) began, due to high costs and

a "transition" to lower altitudes. Possible climate change will lead to an adjustment in the balance between summer and winter mountain tourism ⁽¹³⁾. In line with the study of protected areas in Serbia, the authors of the following article, as a result of a questionnaire survey of potential tourists to protected areas, received the results of the attitude of tourists to the importance of protected areas for tourism. Respondents noted those forms of tourism that support the protection and improvement of natural areas, that is, there is an emerging ecological consciousness of visitors, which will indirectly promote sustainable tourism ⁽²⁰⁾.

4. CONCLUSION

1. Today, according to experts, one of the main constraints to the development of tourism is the lack of necessary infrastructure in Kazakhstan.
2. Agricultural tourism at present, as a representative of an innovative diversified type of tourism, is able to solve many issues of the country's sustainable development in terms of its environmental friendliness and sociality.
3. In line with the predicted economic crisis, taking into account the current global trends in mountain tourism in the Alpine countries and the manifested "overtourism" at the TOP mountain tourist sites of the Almaty region at sites over 1500 m above sea level, the formation of tourist and recreational complexes in the foothill areas is being updated.
4. In connection with the completion of the State Program for the Development of Tourism in Kazakhstan in three years, it is necessary that SDGs UN - UNWTO initiatives be integrated into the next document.

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