

Main Opportunities for Ecological Tourism Development in South-Eastern Part of the Kazakhstan

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ABSTRACT

Ecotourism expansion is specified an important element of state policy according to the Tourism Industry Development Concept of the Republic of Kazakhstan till 2020 and simultaneously can support the environment constancy in Specially Protected Nature Areas. In addition the ecotourism successes are closely linked to sustainable development of the country. Possibilities for ecotourism development by example of the Almaty region on basis of the official data and information of own and foreign researches are analyzed. Current states of socio-economic, institutional and environmental components of sustainable development for the Almaty region (south-eastern part of Kazakhstan) which have relations to most important issues of the ecotourism development are presented. Study of the ecotourism development problems allows determine the main combat directions and mechanisms in Kazakhstan in general and in separately taken territory as Almaty region.

Keyword: Ecotourism, Environmental Attitudes, Market Research, Almaty Region, Kazakhstan.

1. Introduction

Ecotourism according to The International Ecotourism Society (Bricker, 2013) is defined as “responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education”. Education is meant to be inclusive of both staff and guests (Ecotourism and Sustainable Development, 2002; Basic orientations for the sustainability, 2003). Being an increasingly important economic and social activity, tourism amplifies and, at the same time, increases the negative impact on the environment (Western, 1993; Anisimov et al., 2011; Bochkareva, 2015). Since the beginning of the eightieth years of the last century around the world becomes one of popular types of travel – ecological tourism which purpose is nature conservation: at ecotourism travelers use only environmentally friendly transport, will organize halts only in specially taken away places, pick berries, herbs in the resolved zones, means of placement are under construction only of harmless materials (Ceballos-Lascrain, 1996; Kuskov et al., 2015).

Despite of efforts of world scientific community, the term `ecotourism`, as well as ecotourism types classification, still doesn't have unique concept, solely correct and recognized treatments. (Fennell, 2014; Honey, 2008). Ecotourism is oriented for people, travelling with different purposes: from short time rest on the nature to scientific researches of natural and ecological character. For planning, rational organization and management of all ecotourism types diversity, it can be systematized according to var-

ious criteria: purpose of trip, main visited objects, travelers' group, duration of travel, recreational occupation etc. Main objects of ecotourism in a classical (natural-oriented) model are relatively untouched natural complexes and their components.. During last two decades natural-anthropogenic and anthropogenic landscapes in connection with cognition of nature management and ecology are becoming objects of ecotourism. This direction includes wide range of ecotourism, starting with history of nature tours to ecological-educational, finishing with tours to industrial enterprises. (Hrabovchenko, 2003; Kolbovsky, 2006).

In Kazakhstan, ecotourism began to develop since 1995, and after adoption of the Law `About tourist activities in the Republic of Kazakhstan` from 13.06.2001 №211, it officially got the status of one of the most foreground sectors of tourism. (Guidelines for the ecological tourism development, 2009). Unfortunately, in the Republic of Kazakhstan the development and scientific studying the one of most perspective direction of tourism became manifests itself only with approach of the new millennium. Kazakhstan has an abundance of natural and cultural resources and offer many opportunities to develop and promote tourism, especially niche-based segments such as ecological, cultural and adventure tourism. Today there are separate scientific works and practices that comprise a problem of development ecological tourism in country, however there are no researches which would reveal definition, the basic principles and mechanisms of ecotourism, and also, various models of ecotourism like in foreign experiences.

2. Research territory

Almaty region is located in southeast part of the Republic of Kazakhstan (Fig. 1). There is disputed theory holds that the geographical name is derived from the Kazakh words "Apple" (Alma) and "Father" (Ata), and can translated as "Father of Apples". There is great genetic diversity among the wild apple trees in territory. Almaty region is thought to be the ancestral home of the apple. The wild *Malus sieversii* is considered the progenitor for all modern apples. Its age is about 165 million years. In the past the northern part of territory has been called Zhetysu (Kazakh "Land of Seven Rivers") (Lukhtanov, 2014).

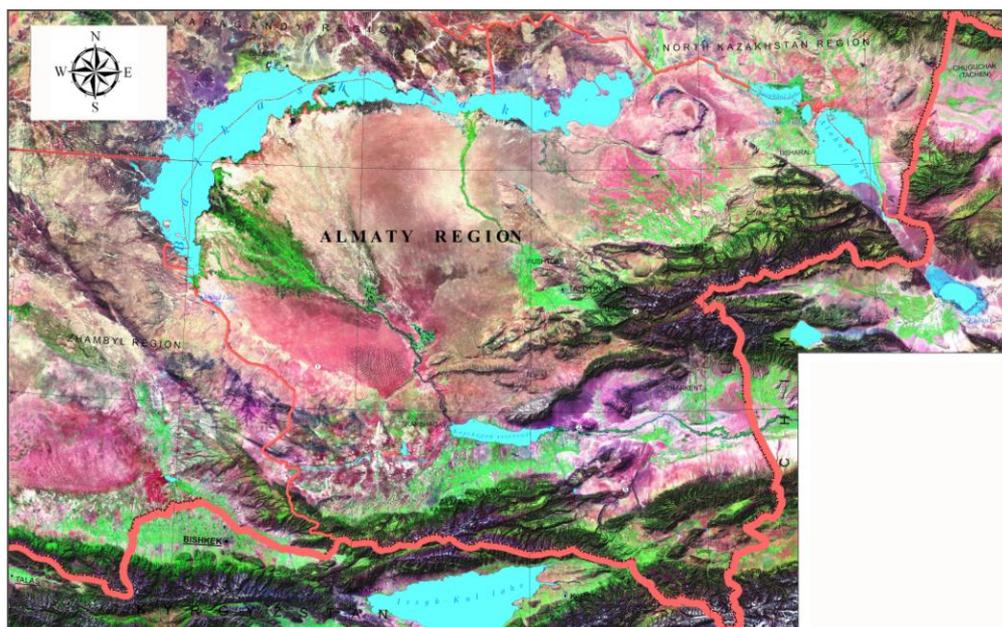


Fig. 1: Territory of the Almaty region

The region's natural characteristics have zonal spatial distribution. The northern part is a semi desert plain, lopsided to Balkash lake and split by the ancient channels of the Ile river, the most considerable of which is Bakanas. There are two separate massifs – in the south and the east – along which stretch mountain ranges: Ile Alatau and Zhetysu Alatau (Tien Shan Mountain). Steppe vegetation is usual characteristic for foothill areas, softwood forest – for middle parts of mountains, Alpine meadows and glaciers – for upper parts of mountains. There are 24 types of mammals, 35 birds, 4 types of reptiles and many fishes that are subject to special protection and are included in the Kazakhstan's Red Book. Almaty region from the position of climatic environment 5 zones are included: from desert to permanently frozen (glacial). climate of continental conditions are characterized; average temperature in January in the flat regions is $-15\text{ }^{\circ}\text{C}$, in foothills $-6\text{...}-8\text{ }^{\circ}\text{C}$, in July $+16\text{ }^{\circ}\text{C}$ and $+24\text{...}+25\text{ }^{\circ}\text{C}$, correspondingly. The annual amount of precipitation in the plains is 300 mm, and ranges from 500–700 to 1 000 mm per year in the foothills and mountains (Lukhtanov, 2014).

Almaty region have borders with Kyrgyzstan and the Xinjiang state of the People's Republic of China, and with the Kazakhstan's regions: Zhambyl region in the west, Karagandy region in the northwest (water boundary crossing the Balkash lake), and east Kazakhstan region in the northeast. The area of Almaty region are about 224 000 km². The population in region was 1.7 million people on 01.12.2014. The population is represented by 103 nationalities and ethnic groups (Brochure “Regions of Kazakhstan”, 2015; Population of the Republic of Kazakhstan, 2015). Region's pearl is the Almaty city. Almaty is the largest city in the Kazakhstan. It served as capital from 1929 to 1997. Current government, established with independence in 1991, relocated the capital to Astana in north part of the country. Almaty are the largest, most developed, ethnically and culturally diverse city in Kazakhstan, as well as the biggest agglomeration.

Some historical sources say that in ancient times in this region of the Great Silk Road, there were several trade settlements. In the year 1854, not far away from ruins of one oldest town, the city of Vernyi has been founded. In Soviet times the city was renamed to Alma-Ata. It served as capital from 1929 to 1997. The current government, established with independence in 1991, relocated the capital to Astana in north part of the country. Modern Almaty are the largest, most developed, ethnically and culturally diverse in Kazakhstan, as well as the biggest agglomeration. “South Capital” is the unofficial name of the city. There are a lot of opportunities for cultural as well as for active rest.

3. Materials and methods

In researches the comprehensive approach are applied. We used following scientific methods: description, scientific abstraction and ascent from the particular to the general, comparison, analogy, analysis and synthesis, extrapolation to the entire territory of the regularities which identified in the model plots. From the particular methods, we used statistical analysis, computer information processing technology and produce indicators for the subjects of the ecotourism.

4. Results and discussions

4.1 Ecotourism Market Summaries. Starting from beginning of the birth of tourism in the Almaty region, the main motivation of travel was the natural attractions. Currently, rural areas are among the most attractive places for ecotourists, so the work is an attempt to evaluate the potential for development of tourism in rural areas, through the study of data analysis. Nowadays, the total number of tourist facilities in Almaty

region – 456 units, there located over 200 hotels, 72 guest houses and 19 haunting lodges, 21 recreation centers, 15 health centers and dispensaries, 13 health camps and centers, 190 zones and recreation and 6 other objects. In the area under license is valid 80 travel companies, 53 of them tour operators, others – travel agencies. For tourism development in the Almaty region was developed 109 tourist routes, which includes such types of tourism as cognitive, ecological, ornithological, health and fitness, ethnographic and others ([Almaty Region Development Program, 2011](#); [Tourism of the Kazakhstan, 2015](#); [Tourism of the Almaty region, 2015](#)).

In region are located the State National Natural Parks as “Altyn-Emel”, “Kolsay lakes”, “Ile Alatau”, “Zhetysu Alatau” and “Sharyn”, as well as the Almaty and Alakol State National Nature Reserves and others (Table 1).

Table 1: List of Specially Protected Nature Areas in the Almaty region and Almaty city

Name	Area (ha)*	Location	Management Body
Almaty Nature Reserve	71 700	Talgar and Enbekshikazakh districts	Committee on Forestry and Hunting of the Ministry of Agriculture of the Republic of Kazakhstan (CFH MA RK)
Alakol Nature Reserve	65 217,9	Alakol district of Almaty region, Urjar district of East Kazakhstan region	CFH MA RK
Ile-Alatau State National park	199 703	Karasay, Talgar and Enbekshikazakh districts	CFH MA RK
Sharyn State National park	127 050	Enbekshikazakh, Raiymbek and Uygur districts	CFH MA RK
State National Natural Park "Altyn Emel"	520 000 (compliance with the broader)	Kerbulak and Panfilov districts	CFH MA RK
State National Natural Park "Zhongar Alatau"	356 022	Aksu, Alakol and Sarkand districts	CFH MA RK
State National Natural Park "Kolsay lakes"	161 045	Raiymbek and Talgar districts	CFH MA RK
Lepsy State Nature wildlife reserve (zoological)	258 000	Alakol and Sarkand districts	CFH MA RK
Tokty State Nature wildlife reserve (zoological)	187 000	Alakol district	CFH MA RK
Cucan State Nature wildlife reserve (zoological)	49 100	Sarkand district	CFH MA RK
Verhnyi Koxsu State Nature wildlife reserve (zoological)	240 000	Kerbulak district	CFH MA RK
Pribalkash State Nature	503 000	Balkhash district	CFH MA RK

wildlife reserve (complex)			
Karoi State Nature wildlife reserve (complex)	509 000	Balkhash district	CFH MA RK
Almaty State Nature wildlife reserve (complex)	542 400	Raiymbek, Talgar and Enbekshikazakh districts	CFH MA RK
State natural monument "Charyn ashen forest grove"	5 014	Uygur district	CFH MA RK
State natural monument "Chinturgen spruce"	900	Enbekshikazakh district	CFH MA RK
State natural monument "Singing Dunes"	240	Kerbulak district	CFH MA RK
Ile Botanical Garden	65	Balkhash district	CFH MA RK
State Regional Natural Park "Medeo"	708,12	Almaty city	The administration of the city of Almaty
State natural monument "Baum Grove"	130	Almaty city	CFH MA RK
Main Botanical Garden	104	Almaty city	CFH MA RK
* Information from the Committee on Forestry and Hunting of the Ministry of Agriculture of the Republic of Kazakhstan.			

Statistics of the ecotourism market of the Almaty region shows reduction indicators such as the distribution of visitors by purpose of travel, including leisure and recreation in 2015 as compared to 2014 by 27.4 % or 71 923 people. At the same time, reduced the number of realized tourist firm's vouchers to 15 479 units, or 81.4 %. In period, 43 travel agencies, 1 individual entrepreneur and 37 accommodation facilities and 96 individual entrepreneurs engaged in the placement of visitors have served up to 224 000 tourists. Visitors that due to the general economic situation in the world were at 29 % less than in 2014. In general, income from tourism activity subjects of the tourist industry in 2014 amounted to 9.017 million USD. 133 hotel enterprises were served 145 800 people and were rendered services to 2.2 million USD. By the end of the period the all disposal facilities has 891 rooms and one-time capacity in volume more than 2 000 beds ([Almaty Region Development Program, 2011](#); [Tourism of the Kazakhstan, 2015](#); [Tourism of the Almaty region, 2015](#)).

4.2 Ecotourism Market Problems. In addition, today there are a number of problematic issues that would achieve the intended purpose – formation of the Almaty region as an international tourist center with a developed system of services and infrastructure:

1. *Insufficient development of tourism and transport infrastructure.* The material base of accommodation facilities, including hotels, boarding houses and resorts, as well as spa facilities, a high degree of moral and physical deterioration. Nowadays, the scale of tourism, types, quality and supply of places to stay for tourists do not meet international standards.

2. *Low level of service and inaccessibility of significant historical places in Almaty segment of the Great Silk Road does not appeal to both Kazakh and foreign tourists.* Quality requires revision and international advocacy and promotion of tourist routes of our historical heritage. Given that tourism development is directly related to the state of the transport infrastructure, a significant problem becomes limited geography

of passenger aircraft and rail transportation, lack of flexible benefits and discounts on tickets for all modes of transport group trips for tourists both domestic and incoming tourists.

3. *Low level of training, retraining and advanced training and the lack of scientific basis of tourism.* One of the main obstacles of the development of tourism is the lack of specialized tourism personnel serving in the field. This applies not only to the problem of lack of qualified staff at the facilities of the tourism industry, but also to the quality of training for the tourism industry.

4. *Low quality of services in tourism industry.* The problem linked with the previous one, because the poor quality of the service in the area leading to poor quality of services at the facilities of the tourism industry. In addition, it refers to the period of issuance of tourist visas in the Kazakhstan, registration procedures, customs and passport control foreign tourists.

While maintaining the existing level of the ecotourism competitiveness in the Almaty region in the global tourism market opportunities for the development of the ecological tourism market will be insufficient to improve living standards and increase employment, to meet the growing demand for quality tourism services and creating conditions for sustainable tourism development in the country.

On the development of ecotourism industry mainly influenced by external factors, including the state of the world economy, legal regulation, economic and political situation within the country and abroad, and others (Table 2).

Table 2: SWOT of Ecotourism Development Problems in the Almaty region

Strength	Weakness
Existence of infrastructure of tourism industry.	Almost the entire infrastructure is located in the towns and large settlements.
Legislative and regulatory framework for the development of tourism industry.	Mismatch of infrastructure from positions of the international standards.
High interest to ecotourism in the international market (8.9 million people or 63 % of total capacity).	No conditions for a multi-day stay of tourists at the sites of interest.
Operates an information resource center of eco-tourism in Almaty city.	No mechanism for subsidies, preferential duty, and tax benefits to investors.
Working a guest houses.	Not decorated approaches and policies for ecotourism development.
Unique culture and history of Almaty region.	Low quality of access roads to tourist sites.
Rich human resources.	Preparing the personnel is not matched real needs of the market.
Stable growth of the regional economy (1th place in Republic).	Insufficient information support of ecotourism in mass media.
Political stability in the country.	Ineffective use of natural resources (particularly water, forest, fauna resources).
Opportunities	Treatments
Creation of new workplaces including the rural areas.	Increasing the number of one-day routes.
High level of recognition of Kazakhstan in the international tourist market that provide investment and income to the budget.	Decline of tourist flows.
Establishment of a national tourist product.	Low level of investment activity.

Increase tourist traffic of inbound and domestic tourism.	Formation for the Kazakhstan of image as a unfavorable country for tourism, as well as lower investment attractiveness.
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Strategic vision for the development of ecotourism in the Republic of Kazakhstan is formation of the image and statement as a globally recognizable tourist destination by 2020 (in order of development tourism national program). The main long-term environmental trends in ecotourism the following:

a) Increase public awareness for the conservation and protection of the environment, giving the opportunity to develop and implement tourism products “close to nature” that are environmentally sustainable: hiking, biking, horseback riding and bird watching;

b) Changes in the economy caused by climate changes, causing the need for local service providers, tour operators and transport companies to adapt to new conditions.

Ensuring good governance and coordination of tourism policy and development, public organizations in order to implement the state policy in the sphere of ecotourism in the Almaty region (**SMART Program**).

S. Planned development of ecotourism in the Almaty region (date of execution 2017).

M. Increase the flow of visitors to the Almaty region with the aim of ecotourism by 10–30 % (compared with the present day). A positive customer testimonial about realized works in the field of ecotourism. Increase the share of local employment in the 30–40 % in the provision of environmental trails in the region. Minimize costs involving investors in these territories.

A. For advertising media and their placement is necessary to determine the budget, select media, meets the need of the target audience segment, schedule placement and reserve a place in the materials posted on the selected media.

R. Characterized by qualitative indicators (number of tourist arrivals to the region, economic activity and its tangibility in the budget multiplier effect, reducing unemployment among the local population, etc.), the growth of the attractiveness of visitors, identify new mechanisms further planning ecotourism development in the region, as well as a comparison of the market before and after the work done on the basis of the analysis and segmentation of tourists (both internal and external).

T. Period of commitment and implementation of the project after the marketing planning – 2017 year.

4.3 Ecotourism Market Financial Objectives. In January – September 2014 the number of visitors of domestic tourism increased by 8 % compared with the same period of 2013 and amounted to 2.7 million people. During the same period, the number of visitors outbound tourism increased by 21 % and amounted to 5.1 million people. Each foreign tourist provides, according to statistics, three jobs because tourism – this accommodation, and meals, and the world of entertainment, transport, etc. In January – September 2014 the number of visitors’ outbound tourism has increased in comparison with the same period of 2013 by 14 % and amounted to 7.6 million people. Outbound tourism dominates the inbound. This leads to the fact that each year more than 400 million USD out of the country in the economies of other countries.

If Government realize national concept of development of tourism industry, and effective use investment to develop ecotourism in Almaty region, revenues from the tourism industry is expected to increase from 4 % to 10–12 %, of which at least 7–8 % of the ecotourism with the indicators in the area of 10–11 million USD from foreign tourists.

The development of the Almaty region and Almaty city as the part of region will be

based on existing and potentially realized by competitive advantages inherent in specific city and region that would provide additional impetus for accelerated joint interconnected and integrated development.

At the national and world markets Almaty region should be positioned as – international operator in the field of transport, logistics, international trade and modern service center in the financial services, trade, tourism, small and medium enterprises, high-tech, education, and medicine.

High level of competition necessitates a clear positioning in selected niches of expertise – along with the enlarged scope of development (tourism or innovation) should also be chosen more narrow niche specialization in which, firstly, in the Almaty region are available or can be created competitive advantage. Secondly, there is a lower level of competition in international markets. Meanwhile, the competitive advantage of Almaty and Almaty region is the implementation of cluster initiatives in the field of tourism development. This is where the greatest concentration of hotels, resorts, entertainment sites, nature reserves and parks, there is a real willingness of the private sector to cooperate to improve the overall attractiveness of the region for tourists.

City together with the Almaty region can be the center of attraction for tourists in the region in the following areas unique to the region: sporting events (Winter Asian Games 2011, World Cup of Winter Sports) and sport services facilities of the city (Shymbulak, Medeo); recreational services (spa complexes located in the mountains of Ile Alatau); hiking trails in nature (Charyn, Turgen, Issyk Shymbulak, Big Almaty Lake), important cultural events of international scale (jazz festival, the Biennale of Contemporary Art); specialized travel services (center of gambling in the satellite town of Zhana Ile, mountaineering, climbing, rafting, horseback riding, etc.).

Competitive advantages: favorable climatic conditions, the presence on the territory of Almaty region of unique landscape features and several climatic zones. Passage through the region of the route of the Great Silk Road – the historic trade route. The proximity to Issyk-Kul, which gives the opportunity to visit this recreation area during their stay in the city of Almaty. Highly developed infrastructure recreation and leisure activities in the city.

Lower cost of staying in the Almaty region in comparison with the European centers of tourism. Favorable location at the intersection of Almaty traffic flows from Europe to Asia, creating conditions for transit stops in foreign tourists next to these major trunk routes.

The presence in the Almaty region's richest sources of thermal waters, mud lakes, nature reserves, national parks, Lake Balkhash and Alakol, Kapshagay and other recreational resources ensure the development of the tourism cluster to the location within the value chain of companies, both in the field and in the city Almaty.

Definition of tourism services marketing user profile allows you to select specific psychological, behavioral and motivational aspects of choosing the tour. This makes it possible to clearly define the marketing strategy of travel agencies in five components: product, price, place, promotion and public relations.

Researches of marketing profile of international ecotourists by the American consulting company “HLA & ARA” commissioned by the International Society for ecotourism (TIES). As a result, obtained the following data characterizing the ecotourists: For ecotourists who are interested in local culture, added the possibility to visit the ancient ruins, museums, meet the locals. More than 10 % of experienced ecotourists called professional guides important component of selection. This is due to the fact that a large number of clients of travel agencies complain about the lack of information about the nature, culture and history of the places they visit.

Curiously, the recreational needs of ecotourists are changing most rapidly: only 45 % spend the next trip, as well as the previous one. The rest tend to search for a new, including adventure. Therefore, tour operators have to be responsive to customer experience, developing new tours and offering a well-established program for beginners. Experienced ecotourists usually combine several outdoor activities in one round (trekking, horse transitions, rafting and canoeing, crayoning, etc.), paying great attention to travel on water. As for the choice of accommodation, 40 % of ecotourists prefer to stay in the villages; 27 % – in the camps; 21 % – in comfortable hotels; 33 % – in other hotels. According to the Tourism Service of Canada, in the adventure tourism 41 % of the tourists prefer to stay in the cottages and huts, and more than 40 % – in camps and bivouacs.

5. Conclusions

The Almaty region has all the prerequisites to make themselves at international and national levels as: a) tourism and sports center with accommodation of tourist and sports infrastructure throughout the Almaty region; b) the center of transportation and logistics services to the development of a common regional system of transport and service and logistics infrastructure; c) large industrial and service center; d) center for Fundamental and Applied Science (Innovation Complex). These priorities will serve as a breakthrough area “locomotives” of the Almaty region as a whole, and the high dynamics of their growth will be supported by such areas as construction, the development of life-supporting infrastructure and businesses in the service sector. At the global level, the region now has a weak position, as in each direction positioning the Almaty agglomeration (finance, innovation, trade, tourism) in the world are from several tens to several hundreds of competing regions.

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