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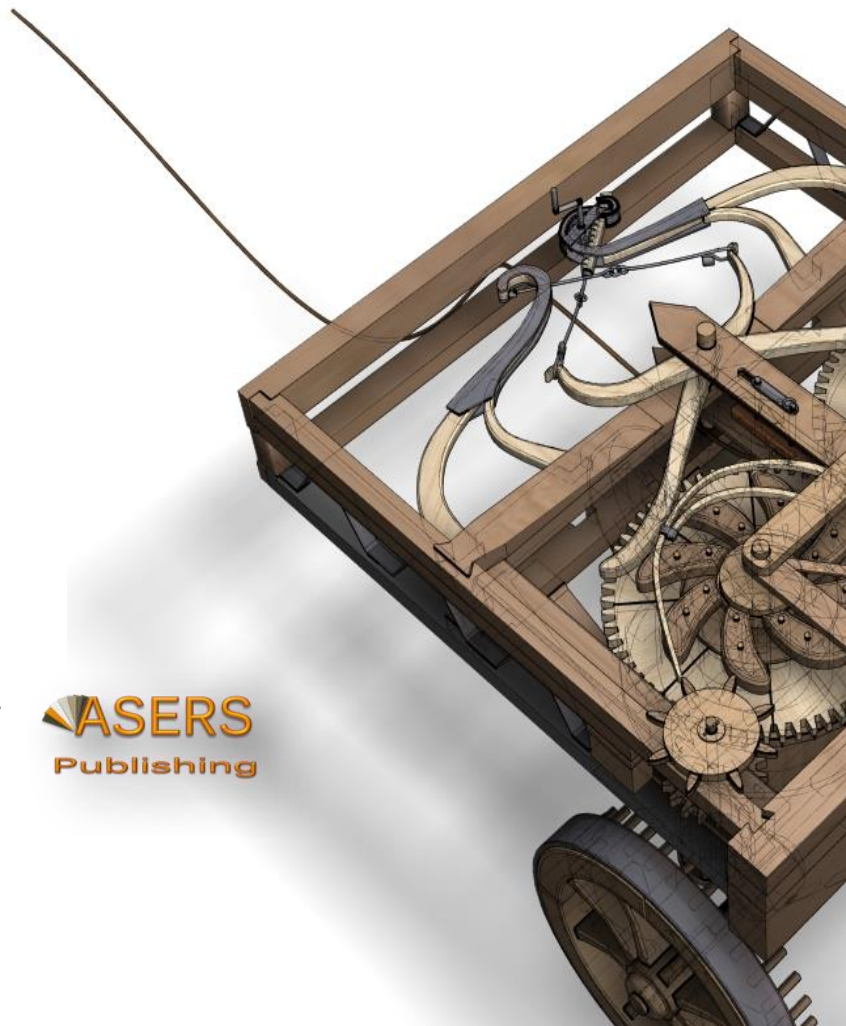
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Table of Contents:

| | | |
|----|---|------|
| 1 | Strategic Analysis of Mediterranean Island Destinations: The Case of Corfu Georgios KONTOGEORGIS, Christos LIVAS, Nansy KARALI | 1525 |
| 2 | The Untapped Potential of Ethno-Tourism in Ulytau Region Rabiga MUKATOVA, Kamshat MUSSINA, Maribel RODRÍGUEZ | 1534 |
| 3 | Observing the Dunning – Kruger Effect in the Results of Tourism Studies Tibor GONDA | 1551 |
| 4 | Strengthening Natural Tourism Empowerment Construction through Brand Strategy – Based Online Marketplace Anak Agung Sagung Alit WIDYASTUTY, Muslichah Erma WIDIANA | 1557 |
| 5 | Management of Recreational Areas. The Impact of Management of the Development of Shchuchinsko-Borovsky Resort Area on the Improvement of the Level of Financial and Economic Sustainability in the Region Kazbek Kuandykovich BOKENCHIN, Marat ALTAY, Aigul SHAIMERDENOVA, Laura Kurymbaevna BOKENCHINA, Bibigul DABYLOVA | 1565 |
| 6 | Corporate Social Responsibility, Knowledge of COVID-19, and Risk Perception in International Tourism Enterprises Mohammad KHASAWNEH, Bashar M. AL NAJDAWI, Hakam M. SHATNAWI, Samer Fandi ABABNEH | 1574 |
| 7 | Historical Relations between Kazakhstan and Hungary and Their Impact on Economic Cooperation and Development. New Experiences and Perspectives upon Tourism Nurlan DULATBEKOV | 1584 |
| 8 | Promoting Tourism Marketing and Service Quality in Thailand's Secondary Tourism Cities Chayapoj LEE-ANANT, Therdchai CHOIBAMROONG, Boonnawat SRIKHWAN | 1595 |
| 9 | Analysis of the Youth Policies and Its Impact on the Economic Policy of the State for the Tourism Development Dinara JAKUPOVA, Gaukhar KOSHEBAYEVA, Nazym ALPYSBAYEVA, Valeriy BIRYUKOV | 1603 |
| 10 | The Potential of Halal Tourism System on Growth for the Province Lampung's Tourism Industry Tulus SURYANTO, Mardhiyah HAYATI, Yeni SUSANTI | 1616 |
| 11 | A Research on Econometric Analysis of Tourism Sector, Economic Growth and Unemployment Indicators in Turkey Bahman HUSEYNLI | 1629 |
| 12 | Interpersonal Communication Between Sign Language Interpreters as Tour Guides and Deaf Tourists in Indonesia Farid Hamid UMARELLA, Endri LISTIANI, Ahmad MULYANA, Endri ENDRI | 1637 |
| 13 | Academic Tourism as an Emerging Tourism Industry in Kazakhstan Bakhyt ALTYNBASSOV, Aigerim BAYANBAYEVA, Baurzhan ISSABEKOV, Yerbolat BARLYKOV, Bekmukhan AKHMETOV, Bakhytbek ZHANKUBAYEV, Indira SHOKHANOVA | 1646 |

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| | | |
|----|---|------|
| 14 | Corporate Governance in Organizations of Higher and Postgraduate Education as Leverage Point for Pathways to the Tourism Development Daniyar ISMURATOV, Gulnar KUSHEBINA, Saltanat VALIYEVA, Dina MANGIBAYEVA | 1658 |
| 15 | Coping Competence and Social Support on Job Performance in the Nigerian Tourism Industry Olusoji Damaro ARUBAYI, Dafe Marcus EJETA | 1672 |
| 16 | Service Employees' Expressions of Emotions in Restaurants: A Transcendental Phenomenology Study Mohammad Shahidul ISLAM, Fariba AZIZZADEH, Sebastian ZUPOK, Hassan BABAPOUR, Janusz SOBOŃ, Joanna ROGOZIŃSKA-MITRUT, Aziz HOSSEINI, Lawrence JONES-ESAN | 1681 |
| 17 | A Critical Review of COVID-19 Pandemic Outbreak in the Restaurant Industry Perumal RAJA, Ankathi RAGHU, R. KANNAN, K. SURESH, V. SIVAKAMI, I. Hiller ARMSTRONG | 1697 |
| 18 | Cloud Gaming: An Antipandemic Case for Restaurants Liudmyla BOVSH, Inna LEVYTSKA, Larysa HOPKALO, Alla RASULOVA, Kateryna KOMPANETS | 1705 |
| 19 | The Influence of Tourist Experience on Local Product Purchase Behavior Dac Hung NGUYEN, Hoang Nguyen KHAI, Quang Van NGO | 1712 |
| 20 | Improving the Innovative Activity of the Region with Impact upon Tourism Adil TOLEPOV, Aigul TLESOVA, Anar MOLDASHEVA, Kuat MUSABAEV, Yerkenazym ORYNBASSAROVA, Botagoz SAPAROVA | 1728 |
| 21 | Nautical Tourism Development Model Based on Coastal Community Empowerment and Financial Literacy in Indonesia Sumani SUMANI, Intan Nurul AWWALIYAH, Ika Barokah SURYANINGSIH, Kristian Suhartadi Widi NUGRAHA | 1740 |
| 22 | Medical Tourism in Mexico: An Economic Activity with Great Potential Laura FISCHER | 1752 |
| 23 | Factors Affecting Performance: Jordanian Hospitality Employees as a Case Study Ahmad A. AL-MKHADMEH, Hakam S. SHATNAWI, Omar ALANANZEH, Ra'ed MASA'DEH | 1759 |
| 24 | Management and Impact of Electronic Commerce in Hotels in Tabasco Rosa del Carmen SÁNCHEZ TRINIDAD, Rocío del Carmen CASTILLO MÉNDEZ, Raymundo MARQUEZ AMARO, Antonio AGUIRRE ANDRADE, Samantha SÁNCHEZ CRUZ, Adriana del Carmen SÁNCHEZ TRINIDAD, Wilber DE DIOS DOMINGUEZ | 1770 |
| 25 | Integration of Electronic Business on Tourism: A Bibliometric Network Analysis Yogi Sugiarto MAULANA, Erna MAULINA, Nenden KOSTINI, Tetty HERAWATI | 1779 |
| 26 | Distance Elasticity of Tourism Demand Robert BĘBEN, Zuzanna KRAUS, Izabela PÓŁBRAT | 1798 |

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The Untapped Potential of Ethno-Tourism in Ulytau Region

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Abstract:

Kazakhstan is a unique country, with beautiful nature, original culture, and traditions. Ulytau region is the historical and geographical center of the Republic of Kazakhstan, the cradle of the Kazakh people. It is one of the epicenters of steppe civilization and nomadic culture. Ulytau is a unique region with over 700 registered monuments of history and culture and has a great potential to develop ethno-tourism. According to conducted survey over a 10-month period from January to October 2021, it was revealed that a huge part of tourists doesn't know about this destination and features of this region and would like to visit this region with ethno-cultural purposes. This article shows the results of the study, the main constraining factors, and mechanisms for the implementation of ethno-tourism. These findings contribute to a better understanding of the involvement of tourists in visiting a tourist destination for the purpose of ethno-tourism, and a number of recommendations are proposed for key stakeholders.

Keywords: ethno-tourism; cultural tourism; tourist potential; Ulytau; cultural heritage; Kazakhstan.

JEL Classification: Z31; Z32; L83.

Introduction

Tourism in modern society is becoming one of the most important sectors of the economy, and its development in places where ethnic groups live can contribute to improve the life of indigenous people and preserve their traditions. The tourism industry also has an impact on other sectors of the economy, including trade, transport, construction, agriculture etc.

Nowadays development of ethno-tourism in Kazakhstan is relevant because it is one of the perspective ways of tourism, especially in the context of tourist potential of our republic. It is clear, that Kazakhstan occupies the ninth place in the world according to its territory, and it is the world's largest landlocked country which is located in the center of Eurasia. The climate of Kazakhstan is sharply continental, and the seasons of the year are clearly defined, in that Siberian frosts prevail in winter, and tropical air masses in summer. Despite this the presence of a rich historical and cultural heritage provides great opportunity for ethno-tourism development in Kazakhstan.

The main goal of this article is to discover the ethno-tourism potential of Ulytau region. The object of study is Ulytau region, and the subject of research is its ethno-tourism potential.

Ethnic type of tourism can satisfy the spiritual and cognitive needs of tourists. During the ethnic tours, tourists get acquainted with the culture and traditions of a particular ethnic groups. Groups of people from generation to generation passed on the survival information to their descendants through their traditions. In this case ethnic culture and local traditions attract tourists to visit special regions.

Traditional language and writing are other ways of transmitting and preserving the ethnic customs and culture of the people. If the local language of the people is lost, then its cultural traditions are eradicated along with it. Because of this on 12 April 2017 a special program named "Rukhani Zhangyru" was developed in Kazakhstan and aimed to preserve and increase spiritual and cultural values, to contribute to the entry for our republic into the 30 developed countries of the world (The official website of Rukhani Zhangyru. <https://ruh.kz/>). Consequently, development of ethno-tourism helps to cultural preservation and to keep ethnic authenticity.

The main goals of the sustainable development of ethno-tourism include following: the rational use of natural resources, the preservation of cultural heritage and the development of ethnic territories, as well as the restoration of natural resources.

Another task of ethno-tourism is the awareness of the Kazakh society as a multinational people and respect for the cultures and traditions of all ethnic groups living in the Republic of Kazakhstan.

This article consists of three parts. Firstly, the literature review of the ethno-tourism concept and tourist potential of region is provided. Secondly, the information about tourist potential of Kazakhstan is analyzed with the focus on ethno-tourism potential of Ulytau region, in this part the main indicators of survey conducted – tourist awareness of this region, motivation of tourists to visit Ulytau etc. Last but not least, the results of the survey are discussed and ways of ethno-tourism development in analyzed region are suggested.

1. Literature Review

1.1 Ethno-Tourism Concept

The term «ethno-tourism» was firstly used by V. Smith, who defined it as unique type of tourism, which pursuing the quaint customs of indigenous and other people (Smith 1977). Some authors added and listed some activities that are connected to ethno-tourism. McIntosh and Goeldner considered travel to observe the cultural expression and lifestyle of exotic people, when tourist visits to ethnic minorities or majorities homes, attending dances, festivals, and some rituals as ethno-tourism (McIntosh and Goeldner 1995). Ethnic tourists looking for new lifestyle and try to compare the contrasts of their lives. Thereby, local souvenirs, handicrafts, ethnic food, tradition, history, folk, literature, dance, ethnic art and music as elements of local culture can be the main attractions of ethnic tourists.

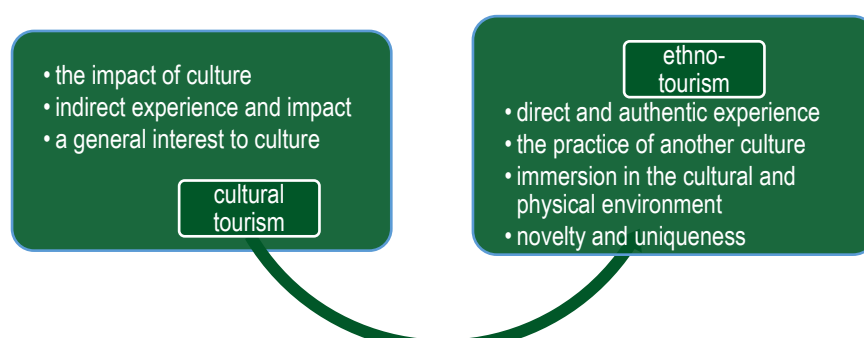
In this case, cultural heritage plays important role in the development of ethno-tourism. Cultural heritage is considered as one of a main tourist resource that should be developed (Timothy and Nyaupane 2009).

The presence of a rich historical and cultural heritage is seen as a driving force for tourism development (Gravari-Barbas 2018).

In addition, development of ethno-tourism conducts to the commercialization of indigenous cultures, including their practices and cultural interactions (Medina 2003). Furthermore, non-human agency of handicrafts and other non-human actors related to ethno-tourism (Ara E. *et al.* 2022).

Cultural tourism and ethno-tourism are closely related to each other and differ by some authors in tourism literature (Wood 1984, Greenwood 1982, Klieger 1990). The main differences between cultural tourism and ethno-tourism given in a figure below (figure) 1.

Figure 1. The main differences between cultural tourism and ethno-tourism



Source: compiled by authors based on the reference (Wood 1984, Greenwood 1982, Klieger 1990)

As can be seen, cultural tourists are motivated by a common interest in learning about culture and have an indirect experience, while ethnic tourists, in their attempts to find novelty and uniqueness, deeply immerse themselves and directly participate in the life of ethnic group, moreover, adopt an authentic experience.

The history of ethno-tourism started from 1977 when V. Smith in her work considered this concept. The development of ethno-tourism concept is determined by some authors in different ways (figure 2).

Figure 2. The development of «ethno-tourism» concept

| | |
|--|--|
| Smith V. (1977) | • is presented from a perspective of the 'quaint' customs of exotic people |
| Graburn N. (1978) | • visiting "exotic" places and destinations, a conjunction of nature and culture |
| Wood R.E. (1980) | • cultural identity uniqueness is advertised for tourists, they can participate in "live culture tours" or observe staged performances |
| McIntosh R.W. and Goeldner C.R. (1990) | • travel to explore the life styles of exotic people and cultural expressions |
| Van den Berghe (1994) | • the aspiration to get to know other ethnic groups |
| Polukhina A.N. (2016) | • promotes communication and exchange between people with a view to involve their culture in the world heritage |
| Wang Y., Shen H., Yea Sh., Lingqiang zhou (2020) | • different culture is considering as a the main tourist attraction, unusual cultural experience |
| Tomczewska-Popowycz N., Taras V. (2022) | • refers to visiting places of one's own origin (roots tourism) as well as visiting places inhabited by exotic ethnic groups or tribes |

Source: compiled by authors based on the reference McIntosh and Goeldner 1995; Graburn 1978; Wood 1980; McIntosh and Goeldner 1990; Van den Berghe 1994; Polukhina 2016; Wang *et al.* 2020; Tomczewska-Popowycz and Taras 2022

The figure 2 shows that in the academic field there is still no single definition of ethno-tourism concept. In addition, some authors considered it as a type of cultural or cognitive tourism. But, according to analyzed definitions the key elements of ethno-tourism are exotic people, places and culture.

In fact, local communities play important role in the development of ethno-tourism. Being local service providers, they often strategically react to tourism possibilities, constantly discussing the preservation of culture and the benefits of tourism, often facing different choices and making hard decisions (Salazar, Graburn 2014).

In addition, some authors underlined, that tourists tend to travel to regions where the locals share some cultural attributes and named it cultural affinity. In this case, familiar language, architectural style, cuisine, music or ethnicity can be a common cultural attribute (Fourie and Santana-Gallego 2013).

1.2 Tourist Potential of Region

Tourism supports infrastructure, employment, and other investments expressly or implicitly associated to the facilitation of tourist interests (Lee 1988). Tourism turned to a strategic economic development sector, with fast urbanization and an enhancement in disposable income stimulated tourist needs to travel (Huang and Chen 2016).

Ethno-tourism is one of the most promising areas of regional development due to its uniqueness, and also offers tourists the opportunity to become an active participant in the ethno-cultural life of any nation. As tourists travel for the purpose of ethno-tourism to a particular region, ethno-tourism is directly related to regional tourism.

Regional tourism is vital factor for supporting economic development of region in terms of creation new working areas, entrepreneurship, and infrastructure development (Jin C., Xu J., Huang Z., 2019).

Furthermore, tourism can indirectly reinforce the internal identity of one ethnic group through the advancement of its cultural performances and arts, meanwhile tourists searching for ethnic exoticism in undisturbed and unspoiled shape (Van den Berghe 1994).

Development of ethno-tourism gives a great opportunity to region and local citizens, in his work Pitchford (1995) claimed that ethno-tourism can recover the arts, revive skills and accelerate creativity. Harron and Weiler (1992) argued that ethnic tourists want to experience novelty and immersion in a cultural and physical environment.

It is noticeable that regional districts need new ways to involve business and create workplaces because of some challenges, such as the declining in employment in the traditional industries of the region, decreasing of services quality and amenities, as well as migration of youth seeking big opportunities in big cities (Tsui *et al.* 2019).

Governments and the tourism industry considering the positive impact of ethno-tourism on the development of regional economy and local communities, positioned traditional ethnic culture as a resource to attract tourists and investment (Yang 2007).

The existing literature focuses on the development of regional tourism, which depends on some factors, including tourists' travel motivation (Hsu *et al.* 2010), tourism infrastructure, international trade, economic growth, and globalization process (Yang and Fik 2014), limited airline access, coach and rail services, comparatively less attractive tourist sights (Wu and Pearce 2017).

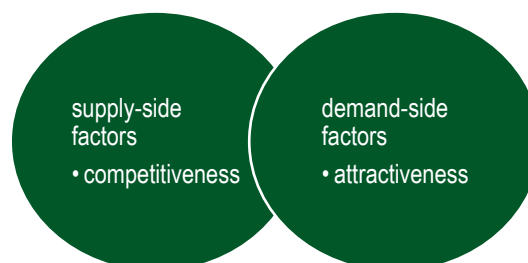
Concerning benefits from local tourism, governments use some regional attributes such as beauty, gastronomy, tranquility and adventure to attract tourists and new businesses to the region (Calero and Turner 2020).

Kuskov A.S. & Dzhaladyan Yu.A. considered tourism potential as a set of cultural, historical, natural, and socio-economic background for the organization of tourist activity in a certain area" (Kuskov & Dzhaladyan 2021).

Bassey (2015) explored tourism potential as a collection of community or place resources, which could be turn into tourist attractions or finished products.

Additionally, Bassey (2015) noted the importance of tourism infrastructure to be ready for visitors. Buhalis (2001) considering supply and demand of tourist regional potential, differentiated two perspectives such as competitiveness and attractiveness (figure 3).

Figure 3. Two perspectives of tourist region potential



Source: compiled by authors based on the reference Buhalis (2001)

Tourist potential of the region is the ability of the regional tourist resources to attract the attention of tourists and satisfy their needs during travel. There is a classification of tourist resources based on the motivation of tourists: cultural resources, natural resources, recreational resources, infrastructure resources.

Cultural resources consist of several elements (Table 1).

Natural resources include components of the natural environment, natural objects and natural-anthropogenic objects that have consumer value and can be used in the implementation of economic and other activities as sources of energy, products and consumer goods.

The main factors affecting the attractiveness of the territory:

- aesthetic appeal of the territory (appearance);
- biodiversity – flora and fauna, as well as the possibility of its direct observation;
- the level of pollution – soil, atmospheric, water, noise, electromagnetic, etc. (the lower it is, the more favorable for development);
- distance from industrial centers;
- availability of infrastructure (accommodation and food facilities, equipped routes, staff of guides, instructors);
- restrictions on the stay of tourists in the territory related to environmental activities;

- the level of prices on related services (Hsu, Cai and Li 2010; Yang and Fik 2014; Wu and Pearce 2017; Calero and Turner 2020).

Table 1. The main elements of cultural resources

| Sphere | Objects | Processes |
|--|--|---|
| <ul style="list-style-type: none"> - Economy - Ecology - History - Architecture - Literature - Music - Fine arts - Ethnography - Religion - Education - Science - Sports | <ul style="list-style-type: none"> - Historical areas and monuments - tourist attractions - small and large historical cities - rural settlements - museum, archive and various collections - anthropogenic landscape monuments - modern technical systems and structures - monuments of architecture - product crafts and handicrafts, other objects of ethnography - other attractions | <ul style="list-style-type: none"> - religious and ceremonial events - guided tours - holidays - cultural festivals - concerts - performances, shows - animation programs - educational programs - conferences and seminars - exhibitions, fairs - sports competitions |

Source: compiled by authors based on the reference (Hsu, Cai and Li 2010; Yang and Fik 2014; Wu and Pearce 2017; Calero and Turner 2020; Kuskov and Dzhaladyan 2021; Bassey 2015; Buhalis 2001).

The recreational resources are at the intersection of two other areas - natural resources and infrastructure resources.

The infrastructure resources are used for satisfying tourists needs and include accommodation, catering, transport, entertainment facilities, tourism organizations, opportunities to provide related services, etc.

It is noticeable that, the main elements of cultural resources in Table 1 are vital in ethno-tourism development with a lot of cultural objects and some cultural processes. In this case, a complex of natural, cultural, recreational and infrastructure resources give the great opportunity to develop ethno-tourism potential in the region. The classification of tourist potential of the region resources includes natural, historical, cultural, and economic resources (figure 4).

Figure 4. Resources of the tourist potential of the region

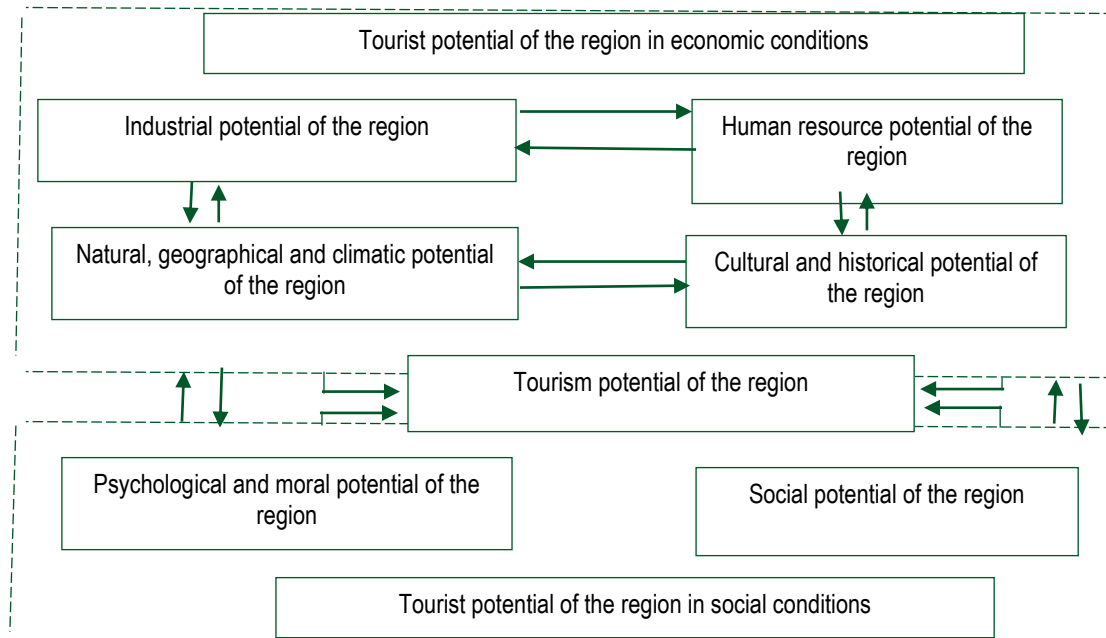


Source: compiled by authors based on the reference (Hsu, Cai and Li 2010; Yang and Fik 2014; Wu and Pearce 2017; Calero and Turner 2020; Kuskov and Dzhaladyan 2021; Bassey 2015; Buhalis 2001).

The resource potential of the tourism industry is the combination of all regional tourist resources and the possibility of their effective use to fully meet the needs of the tourist.

Structurally, the tourism potential of the region is a set of interrelated and interacting potentials: economic and tourist and socio-tourist (figure 5).

Figure 5. Structure of the tourist potential of the regional system



Source: compiled by authors based on sources (Yang and Fik 2014; Wu and Pearce 2017; Calero and Turner 2020; Kuskov and Dzhaladyan 2021; Bassey 2015).

As can be seen, tourist potential plays a great role in the development of tourism destination. In this way, considering the parts of tourist potential complexly, gives a big opportunity to determine the regional tourist potential.

It should be noted that the tourist potential of the region includes the economic-tourist potential, which is the main in relation to the tourism potential of the region as well as the social, moral, and psychological potential of the region, which are considered as additional.

2. Methodology

This study used a quantitative study design using a questionnaire survey. All the variables of the measuring instruments were developed based on a review of the relevant literature and were modified to apply to the study goals and to determine the target population. The questionnaire used for data collection consisted of three sections.

Data for the study was collected using a survey through the Google form program, over a 10-month period from January to October 2021.

201 respondents were interviewed. The informants were selected from key stakeholder groups, including key decision makers in tourism development, government officials, tourism developers and planners, tourism academics, students, and tourists.

The first part consisted of 6 general questions for creating a portrait of a potential tourist based on the works (B.Taheri, A. Jafari, K. O'Gorman, 2014, Jong-Hyeong Kim, J. R. Brent Ritchie, and B. McCormick 2012) and 6 questions on tourists' preferences and travel goals (Kruger & Saayman, 2010; C.N.Mutanga *et al.* 2017). In addition, the general questions about Ulytau region and tourists' interest in travel analyzed region were included in survey and measured on a seven-point Likert scale ranging from 1= strongly disagree and 7 = strongly agree. Other variables included in the questionnaire were socio-demographic variables, such as age, gender, level of formal education and household income, field of activity, as well as residence variables, which included the preferred type of accommodation and transport, spending, media exposure and motivation.

Respondents who are familiar with the history and peculiarities of Ulytau region, were held in section 2, which included 9 questions on the tourism potential of the region, the attractiveness of a destination and dimension of the experience of tourists from visiting and influence the development of tourism on the cultural

enrichment, environmental protection, being able to learn about the history and cultural enrichment (J. Gnoth, A.H. Zins, 2013; Tsung-Chiung Wu, Yu-En Lin, G. Wall, Ph.F.Xie, 2020; N.Maruyama, K. M. Woosnam, 2015) that were evaluated using each item on a seven-point Likert scale ranging from 1 = strongly disagree and 7 = strongly agree.

Section 3 analyzed the problems of ethno-tourism development of in the region and the mechanisms of improvement. All of them were measured by one point on a seven-point Likert scale in the range from 1 = strongly disagree and 7 = strongly agree.

The survey used a set of semi-structured questions about the problems of the development of ethno-tourism based on hindering factors such as transport, infrastructure, material and technical base, the readiness of local residents and the level of service (Li Yang, G. Wall, 2009; Chiu-Hui Hung, 2017; H.J.Yun, X. Zhang, 2017).

There were used quantitative and qualitative analytical methods to analyze and interpret data. Qualitative data has been interpreted and classified in the accordance of topics mentioned earlier. The quantitative data has been encoded and analyzed by using statistical software-SPSS and Excel program.

3 Case Studies

3.1 Ulytau Region

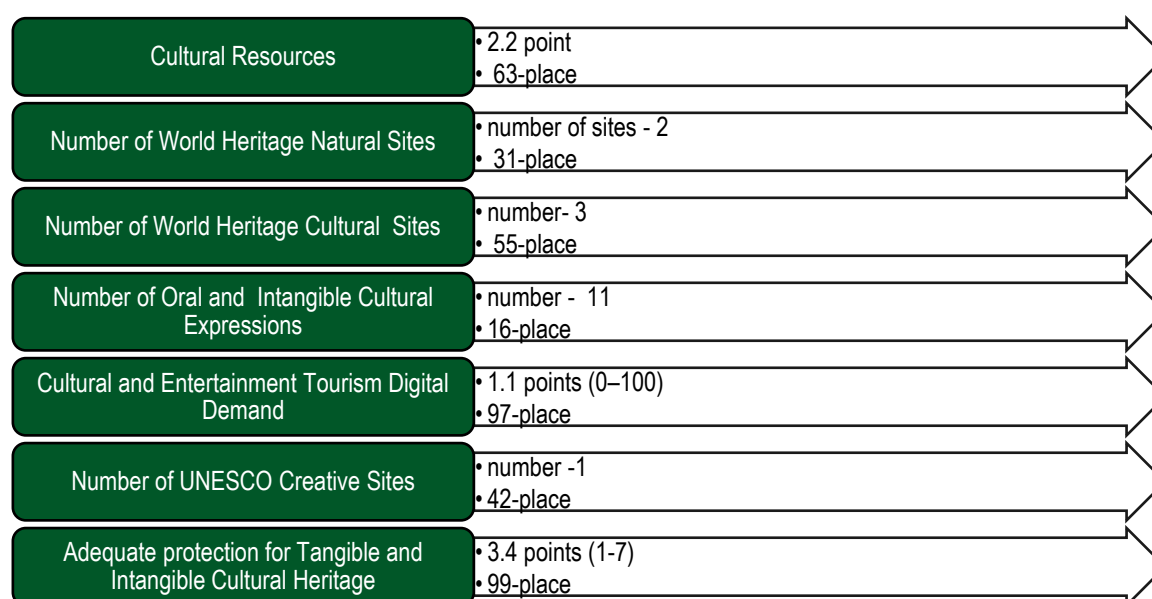
Although many approaches to the sustainable development of ethno-tourism have been proposed and researched around the world, there is a theoretical gap in the case of Kazakhstan. However, the Republic of Kazakhstan has good opportunities for the development of ethno-tourism, having rich cultural resources of its indigenous people.

According to Travel and Tourism Development Index of the World Economic Forum the Republic of Kazakhstan is ranked 66th out of 117 countries with overall score – 3.9, while the leader was Japan with 5.2 points (<https://www.weforum.org/reports/travel-and-tourism-development-index-2021>). It is noticeable that, Kazakhstan made a big jump by moving 23 places up, compared to the 80th place (among 140 countries) in 2019.

This index consists of several pillars. There are some indicators connected to cultural heritage and ethno-tourism in Kazakhstan according to this report (figure 6).

International tourist arrivals in 2021 amounted to 4,560 thousands, with international tourism inbound receipts - US \$458.8 million, in this time T&T industry GDP reached - US \$1,246.3 million (Share of GDP 0.8%), and with 102 thousand jobs in T&T industry.

Figure 6. Indicators connected to cultural heritage and ethno-tourism in Kazakhstan according to Travel and Tourism Development Index 2021



Source: <https://www.weforum.org/reports/travel-and-tourism-development-index-2021>

Considering this Index as a whole, it can be concluded that the results are reliable, and the Index should be used for an overall assessment of the situation in the tourism industry.

Kazakhstan is a multinational country where representatives from more than 130 ethnic groups live (Official site of Agency for Strategic planning and reforms of the Republic of Kazakhstan Bureau of National statistics. <https://stat.gov.kz>). The culture of Kazakhstan attracts both international and domestic tourists to travel to various regions of our country. This is confirmed by the state program "Madeni Mura"(English- "Cultural Heritage"), which was launched in 2003 (Official site of Madeni Mura program of Ministry of Culture and Sports of the Republic of Kazakhstan. <https://madeni-m.kz/>)

The main goal of this program is to promote the spiritual revival and preservation of the historical memory of the nation, as well as to strengthen the self-consciousness of people, and to introduce the world community to the spiritual treasures of the country.

In the list of the UNESCO World Heritage in the Republic of Kazakhstan there are 5 objects, this is 0.4% of the total (1154 for 2021) (The list of the UNESCO World Heritage. <https://whc.unesco.org/>). 3 sites are included in the list according to cultural criteria (Mausoleum of Khoja Ahmed Yasawi, Petroglyphs within the Archaeological Landscape of Tamgaly, Silk Roads: the Routes Network of Chang'an-Tianshan Corridor), and 2 sites are included according to natural criteria (Saryarka – Steppe and Lakes of Northern Kazakhstan, Western Tien-Shan).

The Government of Kazakhstan proposed Cultural landscape of Ulytau to be included as a candidate in the World Heritage List in 1998.

In addition, according to the State Program for the Development of the Tourism Industry of the Republic of Kazakhstan for 2019-2025 ethnographic tourism considered as one of the main priority areas of tourism along with agritourism, hunting, ecological, youth, medical and MICE tourism. In accordance with this program ethnographic tourism will contribute to strengthening family relations, spiritual and moral education of young people, preservation of cultural and development of family values.

Furthermore, this program offers the touristic map - 50 projects of regional significance which includes Historical and cultural complex "Ulytau". This project provides a range of tourist services, including information about sights, excursions along tourist routes and a museum. Within the framework of the project the construction of Ulytau visit center with a hotel complex for 10 rooms was planned.

Kazakhstan is a unique country, with beautiful nature, original culture, and traditions. Regarding this, it is planned to develop 4 E concept (eco, ethno-tourism, events, entertainment). Based on these elements the NC Kazakh Tourism JSC is working to develop the country's tourism brand.

3.2 Tourism in Ulytau

Ulytau has a very attractive natural, historical resources and cultural heritage. Ulytau district was established in November 1939. This district located in Central Kazakhstan; it was a huge part of Karaganda region till June 2022 (figure 7).

According to the Article 9 of the Law of the Republic of Kazakhstan "On the administrative-territorial structure of the Republic of Kazakhstan" Ulytau region was officially established as administrative-territorial unit on June 8, 2022. The administrative center is - Zhezkazgan city. In the north it borders on the Kostanay region, in the east - on the Karaganda region, in the southeast - on the Zhambyl region, in the south - on the Turkestan and Kyzylorda regions, in the west - on the Aktobe region.

It is noticeable that Ulytau is the historical and geographical center of the Republic of Kazakhstan, the cradle of the Kazakh people. It is one of the epicenters of steppe civilization and nomadic culture. Furthermore, it is Mecca of Turkic people. According to historical data, the great events of national history related to the formation of the Kazakh Khanate and statehood took place here.

The territory of Ulytau region is 188,936.61 sq. km. and the population is 227.2 thousand people (2022) with the lowest population density (1.2 people/km²) in Kazakhstan (<https://stat.gov.kz/>).

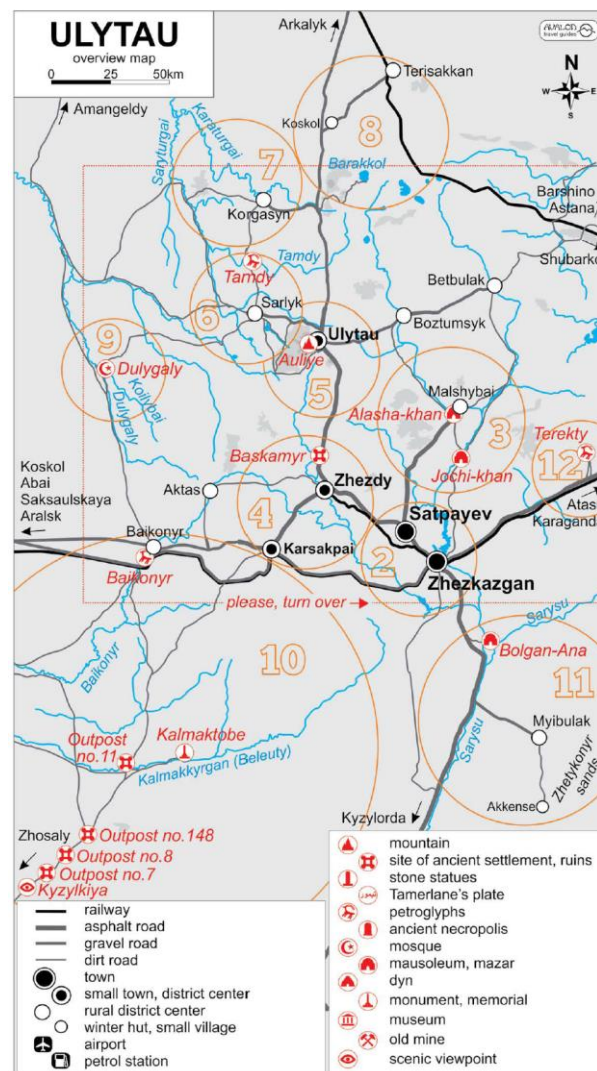
The district consists of 3 cities of regional subordination (Zhezkazgan, Karazhal, Satpayev), 2 districts (Ulytau and Zhanaarka), 25 rural districts, 71 rural settlements.

The territory of Ulytau district is 122.9 thousand sq. km. and the population is 12,5 thousand people (2021) (<https://stat.gov.kz/>).

The district consists of 12 villages and 3 settlement districts and 44 settlements. In addition, there are 1 college and 17 schools. 7.6 thousand hectares are covered with forest. The height of the Ulytau Mountains reaches 1181m.

There are over 700 registered monuments of history and culture, of which 12 are of republican significance: mounds, shrines, and ancient settlements. And more than 10 thousand are not registered with the state.

Figure 7. Tourist Map of Ulytau region



Source: Shuptar V.V. Avalon Travel Guides Ulytau (Shuptar 2016)

Many significant events in the national history of Kazakhstan took place in this area. Ulytau was a favorite place for khans of nomadic tribes. It was a place of association of all three Kazakh zhuzes (tribes) (Abdramanova *et al.* 2017).

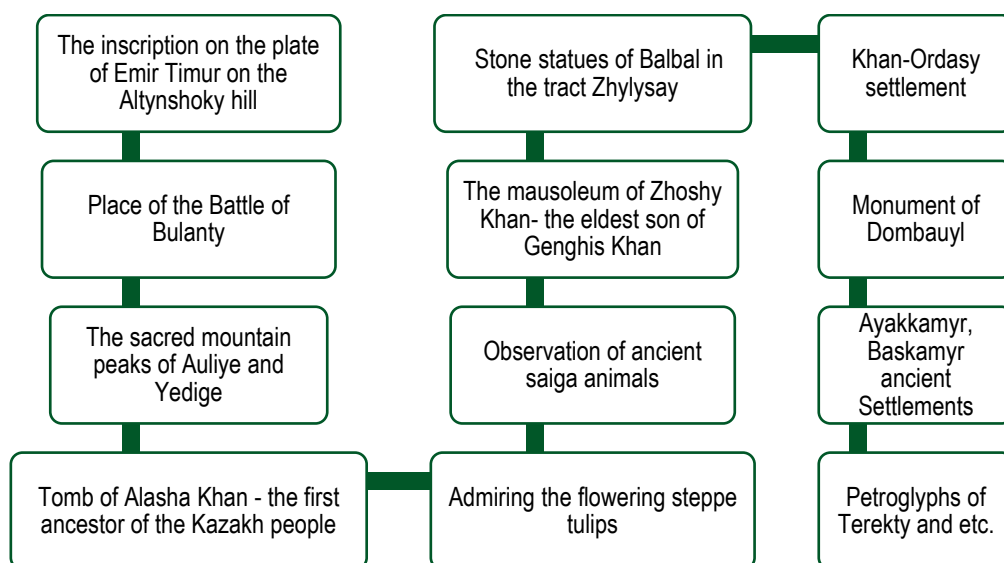
Ulytau has a great potential to be an ethno-tourism center for not only Kazakh people, but for all Turkic world, because a lot of historical and sacred places located here, such as mausoleums of Alasha Khan, Zhoshy Khan, the eldest son of Genghis Khan.

The historical and cultural complex "Zhoshy Khan" was opened in 2021 near the mausoleum of Zhoshy Khan. The complex consists of mausoleum, exposition hall, hotel, and restaurant.

Ulytau is a unique region, which has a great potential to develop ethno-tourism (figure 8).

Nowadays the vast majority of the region's economy is related to agriculture. Despite the rich cultural heritage, the region has a low number of museums. The number of museum remains stable from 2016-2021, 22 in Karaganda region and 3 in Ulytau district (2 historical and 1 reserve-museum).

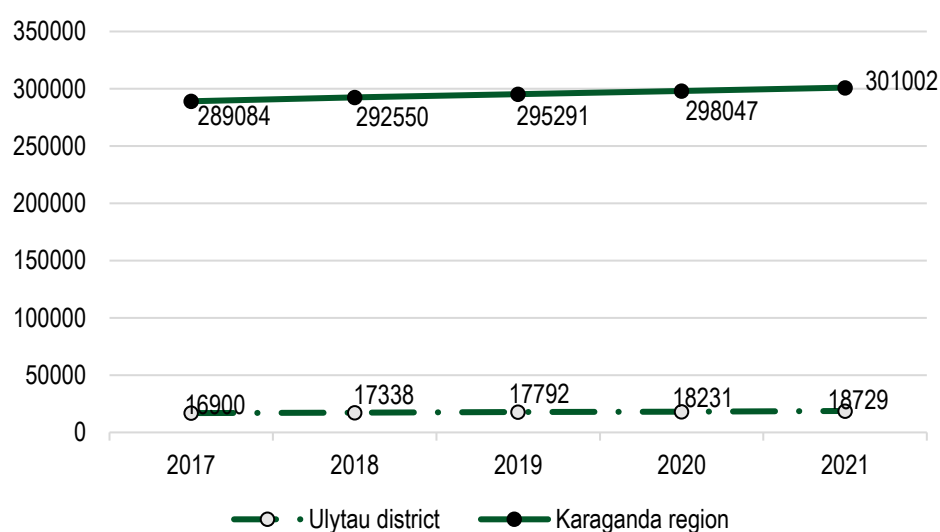
Figure 8. Potential of ethno-tourism development in Ulytau region



Source: compiled by authors

National Historical, Cultural and Natural Reserve-Museum "Ulytau» consists of 25 complexes with a total area of 147,246 thousand hectares and is considered as one of the largest museums in the region. On the territory of the reserve-museum tourists can visit some famous monuments as Alasha Khan, Zhoshy Khan mausoleums, Terekty-aulie, rock paintings of Baikonur, Baskamyr and etc. The Natural Reserve-Museum "Ulytau» is known for its unique flora and fauna, as there are 617 plant species, of which 90. There is a moderate increase in the number of the main fund exhibits (figure 9).

Figure 9. The number of the main fund exhibits

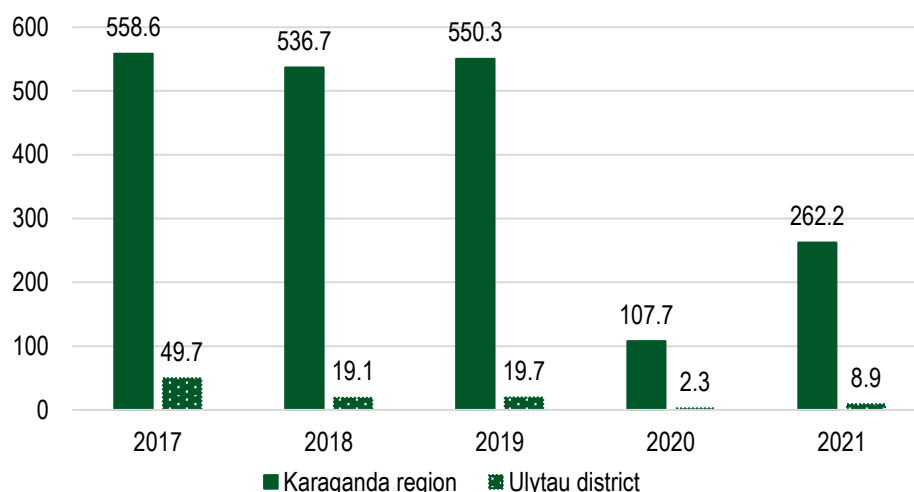


Source: compiled by authors based on <https://stat.gov.kz/>

It can be noted that there was a steady growth in the number of the main fund exhibits from 2017 to 2021 by 10.8 % and 4.1 % in Ulytau district and Karaganda region respectively. The preservation of the exposition, the creation of conditions that ensure safety against destruction, damage, theft, and establishment a rational storage system play important role in the increasing number of exhibits.

However, the statistics given by Bureau of National statistics of Agency for Strategic planning and reforms of the Republic of Kazakhstan shows a negative dynamic of the quantity of museum visits in Ulytau region from 2018 (figure 10).

Figure 10. The number of museum visits, thousand people

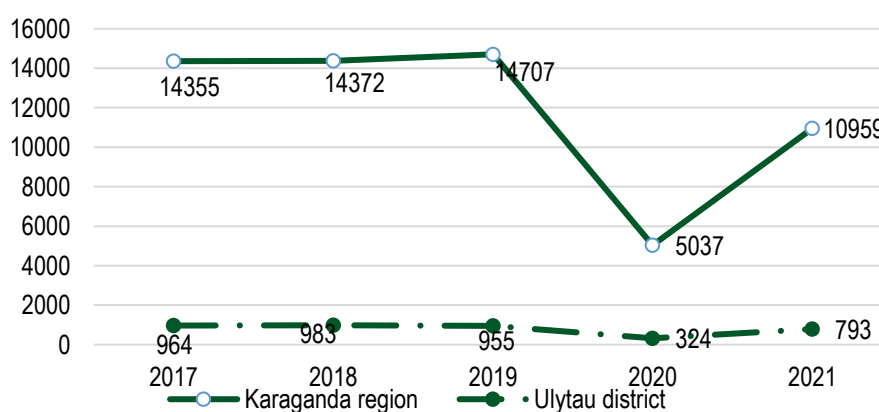


Source: compiled by authors based on <https://stat.gov.kz/>

It is noticeable that in 2021 the number of museum visits decreased by 82.09 % compared to 2017 in Ulytau district, and by 53.06 % in Karaganda region. The number of visits fell to its lowest point in 2020 because of the COVID-19 pandemic. In 2021 there were 2 912 857 and 200 online visits to museum events in Karaganda region and Ulytau district respectively.

In addition, the main reason for the sharp decline in this indicator was the holding of the annual spring ethnic festival «Kokmaysa» in Ulytau region since 2018. During this ethnic festival, a holiday for youth "Altybakan auenderi" is held, where participants, swinging on a traditional swing named «altybakan», perform Kazakh folk songs. In addition, this festival hosts master classes in applied arts, national competitions and games and organized special events for visitors, like excursion trip to the Ulytau mountains, riding horses. Furthermore, national Kazakh dishes are prepared for tourists in the frame of this festival, and tourists preferred to participate in this event instead of visiting museums, it can be considered as one of the factor of reducing the number of museum visits. These factors affected on the number of excursions (figure 11).

Figure 11. The number of excursions



Source: compiled by authors based on <https://stat.gov.kz/>

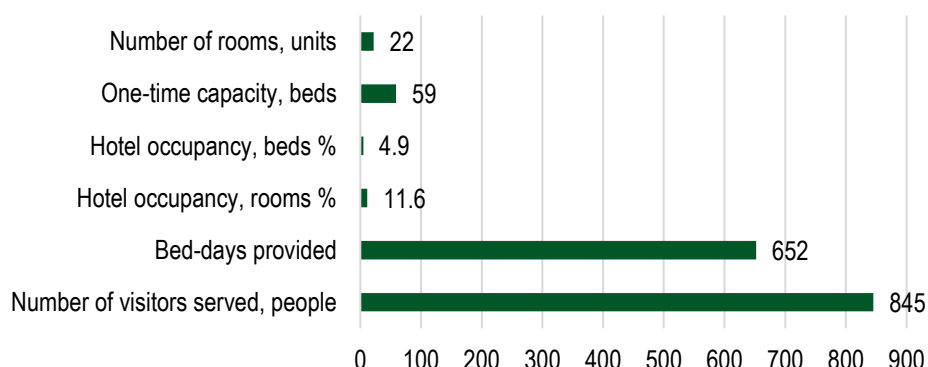
Because of the COVID-19 pandemic the number of excursions dropped sharply by 65.7 % in Karaganda region and by 66.07 % in Ulytau district in 2020 compared to 2019. In 2021 the analyzed indicator increased by 117.5 % in Karaganda region and 144.7 % in Ulytau district but did not reach the level before pandemic.

Nowadays development of tourism in Kazakhstan requires a professional and qualified personnel, especially tourist guides, because tourists prefer to participate in organized excursions.

There is observed an underdevelopment of tourism infrastructure according to the statistical data from Bureau of National statistics of Agency for Strategic planning and reforms of the Republic of Kazakhstan. In 2021

the number of accommodations in Ulytau was only 5, with 14 employees (6-male, 8- female). The main indicators of Ulytau hospitality industry given in following figure (figure 12).

Figure 12. The main indicators of Ulytau hospitality industry (2021)



Source: compiled by authors based on <https://stat.gov.kz/>

According to figure it is noticeable that the conditions of tourism infrastructure in Ulytau did not develop properly to receive and serve a large number of ethno-tourists. In analyzed period 845 visitors were served in placements and the volume of services rendered composed 5,686 thousand tenge (about 12 635\$), while the average cost of a bed-day in the region was 2400 tenge (about 5.3\$). It is very low indicators for this region, and they show that tourism is underdeveloped in Ulytau.

Despite on the fact, that Ulytau region has a unique nature, a marvelous historical, archeological objects and rich cultural heritage, the ethno-tourism and tourism at all are not developed nowadays. Furthermore, the analyzed region has a great opportunity and a huge potential to develop ethno-tourism and become a tourist destination in perspective.

According to the above literature, the following, seven hypotheses (H) are proposed in this study:

- H1. Transport accessibility problems hinder the development of ethno-tourism in the region
- H2. The inaccessibility of information about Ulytau as a tourist destination prevents the development of ethno-tourism in the region
- H3. The lack of accommodation, outdated material and technical base for tourists hinder the development of ethno-tourism
- H4. The low level of service prevents the development of ethno-tourism
- H5. The lack of tourist infrastructure impedes the development of ethno-tourism
- H6. The unavailability of local residents to receive tourists inhibits the development of ethno-tourism
- H7. The lack of amusement and entertainment programs for tourists hinder the development of ethno-tourism.

4. Results

4.1 Resident's Profile

A descriptive summary (*i.e.*, socio-demographic, and residential characteristics) of the respondents are shown in the Table 2.

The predominance (82%) of residents was less than 45 years, in terms of education, about every second the respondents had a higher or postgraduate education, with an average monthly income of 57.2% less than 500 USD.

Regarding the travel preferences of the subjects, most of respondents travel for recreation (83.1%) and for educational (77.6%), cultural purposes (60.2%), they also go to visit friends and relatives (24.9%), for business (13.9%) and other reasons (1.0%). Volunteer work (2.5%) was relatively minor travel motivation.

The most commonly type of accommodation used hotels below four stars (65.7%), followed by luxury hotels above four stars (55.7%) and friends' houses and family (34.3%). Regarding travel budgets, the majority of respondents prefer to spend on \$ 201-500 (38.3%), followed by \$ 501-1000 (33.3%) and \$ 1001-2000 (8%).

Regarding the data on how the respondents search for information about the place of travel, they had the opportunity to choose several answer options, and the most popular way was through social networks (74.1%),

then the Internet, websites, forums (71.1%), friends, acquaintances (57.2%), mass media (31.3%), less popular textbooks and books (6%), telephone calls (3%) and mailing (3%).

Table 2. Profile of subjects (N=201).

| Variables | % | Variables | % |
|------------------------|------|--|------|
| Gender | | Preference to travel (several answers were possible) | |
| Male | 28.9 | Alone | 12.4 |
| Female | 71.1 | With family | 79.1 |
| | | With friends | 53.7 |
| | | With an organized tour | 23.4 |
| Age | | Travel goals (several answers were possible) | |
| 18-25 | 43.7 | Cognitive | 77.6 |
| 26-35 | 16.4 | Visiting family and friends | 24.9 |
| 36-45 | 21.9 | Recreation | 83.1 |
| 46-55 | 9 | Volunteering | 2.5 |
| 56 and above | 9 | Business | 13.9 |
| | | Cultural | 60.2 |
| | | Other | 1 |
| Marital status | | Preferred placement type (several answers were possible) | |
| Married | 39.8 | Luxury hotels (4* and above) | 55.7 |
| Single | 60.2 | Mid-range hotels | 65.7 |
| | | Motels | 16.4 |
| | | Camping | 24.9 |
| | | Accommodation in the homes of acquaintances, friends | 34.3 |
| | | The Hostel | 19.4 |
| | | Other | 7 |
| Education level | | Preferred transport for travel (several answers were possible) | |
| School diploma | 9 | Air | 84.6 |
| College certificates | 1 | Railway | 44.3 |
| Bachelor's degree | 47.7 | Own car | 50.7 |
| Postgraduate education | 42.3 | Rental car | 23.4 |
| | | Public transport | 13.9 |
| | | Other | 0.5 |
| Employment | | Monthly Income (\$*) | |
| Office worker | 21.9 | Less than 200 \$ | 9 |
| Civil servant | 13.9 | 201-500 \$ | 38.3 |
| Self-employed | 6.5 | 501-1000 \$ | 33.3 |
| Worker | 1.5 | 1001-2000 \$ | 8 |
| Service sector | 20.4 | 2000 \$ and above | 2 |
| Housewife | 1 | Not decided | 9.4 |
| Student | 31.8 | | |
| Retired | 3 | | |

Source: created by authors based on the survey results

Only 9% of respondents have visited the Ulytau region, while the majority (46.8% strongly agree, 26.9% agree) would like to travel to this region and take part in cultural events in Ulytau (37.8% strongly agree, 31.3% agree). According to the survey, the vast majority of respondents are motivated to visit Ulytau by ethno-cultural goals, to learn more about cultural heritage (76.1%), to get acquainted with historical monuments (58.2%), to visit holy places (41.3%), to be closer to nature (37.3%), while only 38.8% of respondents are familiar with the history and peculiarities of the Ulytau region.

4.2 Ulytau Tourist Potential

78 respondents who completed the second part of the survey, 48.7% learned about the region from textbooks and books, 42.3% through the Internet, websites, forums, 38.5% from friends and acquaintances and 33.3%

through social networks. While the respondents are most attracted to Ulytau by historical events (74.4%), landscape and mountains (62.8%), mausoleums (44.9%), culture (38.5%), flora and fauna (17.9%), indigenous people (11.5%) and opportunity to relax (15.4%)

According to a survey of respondents who are familiar with this region, 65.4% absolutely agree and 24.4% agree that a visit to Ulytau provides an opportunity to learn more about the history of Kazakhstan, cultural enrichment (56.4% absolutely agree, 38, 5% agree), makes it possible to get acquainted with the peculiarities of the national color (53.8% absolutely agree, 42.3% agree), the opportunity to be closer to nature, preserving the environment (48.7% absolutely agree, 34.6% agree), provides an opportunity to get acquainted with the biodiversity and geography of Kazakhstan (50% absolutely agree, 35.9% agree).

In addition, most of the respondents are attracted by the Ulytau region as a unique direction of ethno-tourism (48.7% absolutely agree, 46.2% agree) and believe that this region has great potential for attracting tourists (57.7% absolutely agree, 26.9 % agree).

According to survey respondents highlighted the main problems that hinder the development of ethno-tourism: transport accessibility problem (48.3% of respondents absolutely agree and 28.9% agree), the inaccessibility of information about Ulytau as a tourist destination (42.8% absolutely agree and 29.4% agree), the lack of accommodation, outdated material and technical base for tourists (38.8% absolutely agree and 32.3% agree), the low level of service (42.3% absolutely agree and 35.8% agree), the lack of tourist infrastructure impedes the development of ethno-tourism (45.8% absolutely agree and 29.9% agree), the unavailability of local residents to receive tourists (26.9 % absolutely agree and 33.8 % agree), and the lack of amusement and entertainment programs for tourists (31.3 % absolutely agree and 30.3% agree).

Analyzing the survey data by measuring the internal reliability of individual items of the questionnaire, an estimate of the Cronbach's Alpha coefficient exceeding the value of 0.7 was obtained, which indicates the reliability of the survey questions. The survey reliability scale is presented in Table 3.

Table 3. The survey reliability scale

| The reliability scale | Number of questions | The Cronbach's Alpha coefficient |
|---|---------------------|----------------------------------|
| The potential of ethno-tourism development in Ulytau region | 16 | 0,864 |
| The problems of ethno-tourism development in the region and the mechanisms of improvement | 9 | 0,858 |

Source: created by authors based on the survey results

In the case of analyzing the potential and problems of ethno-tourism development in Ulytau region, Cronbach's Alpha indicates more than 0.8 for both scales and suggests internal reliability.

It is noticeable that, Ulytau region has a great potential to development of ethno-tourism, but a huge part of tourists doesn't know about this destination. As can be seen, the lack of information about this region as a tourist destination hinders the development of ethno-tourism, which can be solved by marketing tools, and according to survey results, by most popular ways for searching information through using social networks, the Internet, websites, forums, and mass media.

As the results of survey showed, it is necessary to create a special ethno-tourist product in analyzed region by considering the interests of tourists who travel with family and friends, for cultural, cognitive, and recreational purposes, providing accommodation with high quality services in mid-range hotels and improving the air, auto and railway transport accessibility to destination. It is necessary to support the solution of these problems in a complex manner with the involvement of key stakeholders, including the government, local communities, and investors. Only by the development of infrastructure, creating accommodation, improving transport system, readiness of local residents to receive tourists the potential of ethno-tourism of Ulytau region can be developed.

In this case special governmental programs and tourism projects aimed at developing tourism infrastructure, opening new workplaces, providing professional trainings for local citizens the basics of hospitality standards, preservation historical and archeological, cultural objects, promotion of this region on the domestic and international tourism market, encouraging small and medium-sized entrepreneurship and attracting investments are vital.

Conclusion

This case study achieved its goal by demonstrating that Ulytau region has great potential and attractiveness among tourists for the development of ethno-tourism. The region has excellent geographic, historical, cultural, natural features to turn into a popular tourist destination.

Tourists may be interested in this region for travel with ethno-cultural purposes, to get acquainted with the history of the country, to visit the holy places of the region.

The transport accessibility problems, low service, the lack of infrastructure, and available information about this region as a tourist destination restraining the development of ethno-tourism in the analyzed region.

Thus, in this study, the first attempt was made to compare the accompanying literature to deepen knowledge about ethno-tourism through an analysis of the tourism development potential in Ulytau. In addition, the study has contributed to the identification and assessment of the main problems associated with the development of ethno-tourism in the region. This is important because it provides the basis for several recommendations for the development of ethno-tourism in the region and the future direction and practice of ethno-tourism in general.

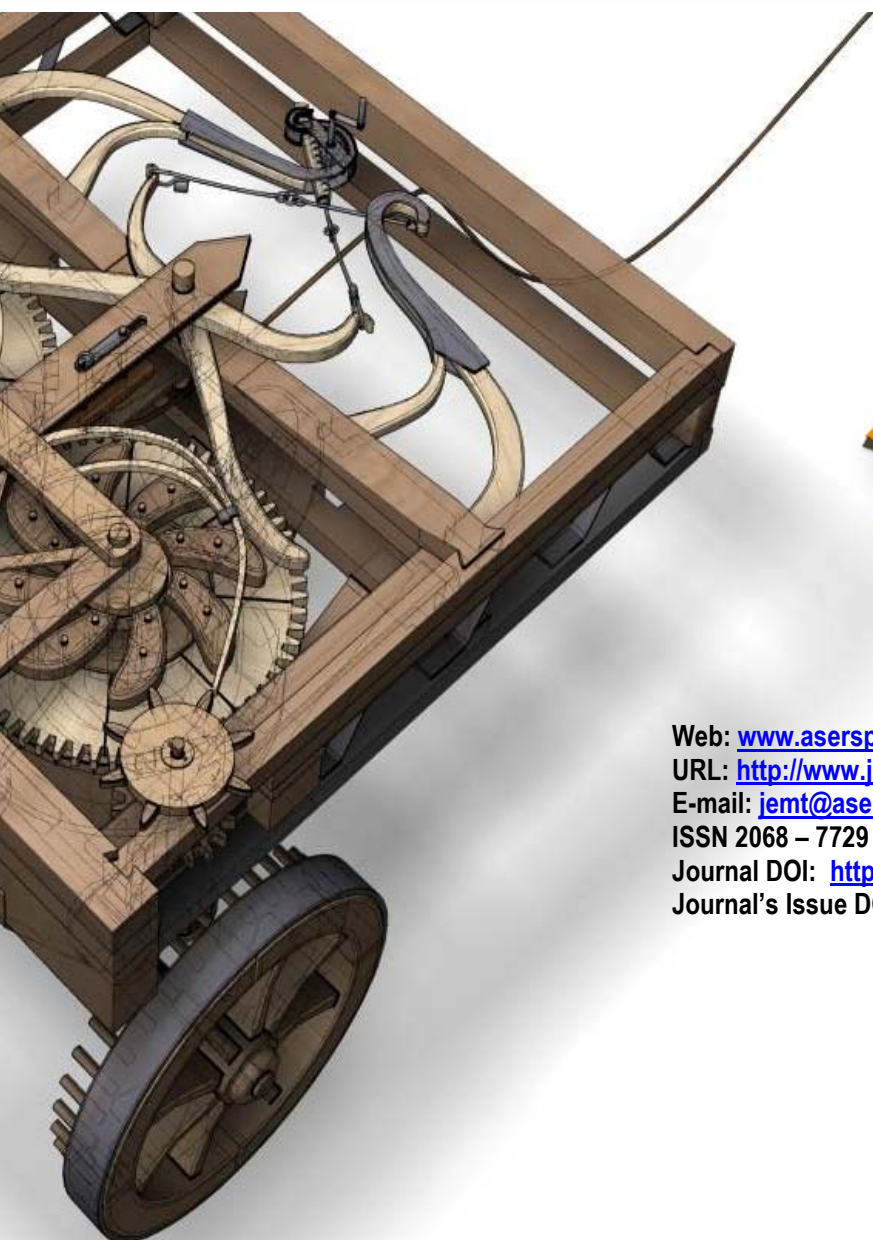
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