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Ecotourism in Mangystau. A survey of the European consumer

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About

Irina Grigoryeva is a biologist (M.Sc.) from Kazakhstan. Her master's thesis dealt with the steppe marmot and its population in the Akmola and Karaganda areas in Kazakhstan. Her research was conducted using satellite images. Since her study, she works for the NGO Association of Conservation of Biodiversity of Kazakhstan (ACBK). During her Dönhoff Fellowship, she is focused on the development of ecotourism concepts in the Ustyurt Nature Reserve (IUCN Ia) and places around this reserve in Kazakhstan. Before coming to Greifswald, she already conducted investigations and discussions in the target area, on the basis of which she is now developing recommendations for tourist routes, other tourist infrastructure and information and communication materials. During her stay in Germany, she will incorporate experiences and recommendations from German experts and organizations in her work.

Abstract

Due to the rather tough competition that has developed in the modern CIS tourism market and complex differentiation of consumer requests for tourist products and services of particular relevance is the assessment of tourist demand for modeling the market and the activities of tourist enterprises in order to improve the economy efficiency of the tourism industry.

Mangystau region has a significant tourist potential, which includes a unique cultural heritage, the presence of picturesque wildlife, beach and cruise tourism on the Caspian Sea, sports, extreme, and eco-tourism. The territory, with its unique natural resources, cultural heritage, archaeological and historical monuments, can be harmoniously integrated into the international tourism market and achieve its intensive development this will ensure a steady increase in employment and the economy related sectors development, increasing income and investment in the national economy.

However, the analysis of this study shows that the region remains insufficiently attractive to foreign tourists. With its uniqueness, the tourist product is not competitive enough and loses to foreign analogues in terms of availability, service level, and price. Identifying opportunities for tourism development requires a deep understanding of tourists needs and values, and how to increase their satisfaction and loyalty.

The task of studying the needs of different target groups among tourists is highly relevant for creating popular products and identifying the optimal trajectory of ecotourism development.

The study purpose is to determine the personal preferences of European tourists and tourist organizations, important criteria for them when visiting the Mangystau region.

To achieve these goals was conducted a marketing study in the anonymous survey form of European tourists and tour operators interested in Central Asia and Kazakhstan. The main research method is a closed and open survey type using the online program Google Forms based on a specially developed

questionnaire. The survey involved 51 tourists aged 18 and over. 5 out of 60 travel organizations have expressed a desire to cooperate and create tours in the proposed region.

As a result, we found out the reasons why there are problems in attracting European tourists and tourist organizations to the Mangystau region, identified the most attractive tourism destinations, preferences in accommodation, transport, routes. It became clear that tourists are interested in the culture, nature, and place history, which gives an understanding of what type of tourism to organize. In the document in more detail conclusions are made regarding what is of interest to respondents and how to implement their needs. Recommendations were created based on the results and data analysis.

First of all, the recommendations are aimed at Kazakhstan's government bodies, akimats, and organizations that provide tourist services, for which it should be important to work together with the involvement of the local population. Adhering to the above-mentioned priority steps, the development of the region should reach a new level in the field of tourism.

Keywords: tourism; tourist market; consumer preferences; tourist potential; tourist products; Ustyurt reserve; Mangystau region.

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1.Introduction

1.1.Background

1.1.1.Kazakhstan

Kazakhstan is located in the center of the Eurasian continent, at the interface of Asia and Europe. About 15% of the territory is included in Europe and 85% in Asia. The geographical center of the European-Asian subcontinent is located in Kazakhstan (at the intersection of the 78th Meridian with the 50th parallel) [1]. (Fig. 1)



Figure 1. Map of Kazakhstan
Resource: worldmap.harvard.edu/maps/Kzstates

Kazakhstan occupies a Central connecting, transit position. Kazakhstan borders: in the East with the PRC-1782.8 km, in the South-West with Kyrgyzstan-1241.6 km, with Turkmenistan-426 km, with Uzbekistan-2351.4 km and in the West - North borders with the Russian Federation-7548.1 km. It has water borders with Azerbaijan and Iran - 1,730 km.

The climate in Kazakhstan is moderately continental, relatively dry. In summer, Kazakhstan has a dry heat, the temperature can reach + 35-40 degrees. Winter lasts from mid-November to April. The air in winter is dry and cold, the average temperature in January is -20.

Climate features on the Kazakhstan territory are determined by:

- Inland position and distance from the oceans as the main sources of atmospheric moisture;
- Location is relatively low latitudes, which determines a relatively large amount of radiation balance;
- The surface device, on which the features of circulation processes largely depend.

The landscape of Kazakhstan is diverse. About 58% of the territory is occupied by deserts and semi-deserts, 26% - steppes, 10% - mountains, only about 5.9% - forests. About 23% of the country's territory is used for agriculture, and 70% is suitable for free-range animal husbandry [2, 3]

1.1.2. Mangystau region

Mangystau region (Fig. 2) was formed on March 20, 1973. The region is located in the South-Western part of the Republic of Kazakhstan and is formed by historical and geographical areas-the Ustyurt plateau, the Mangystau Peninsula, and the southern part of the Caspian lowland – the Buzachi Peninsula. The total area of the Mangystau region is 165600 km² [4, 5].

The region is located to the East of the Caspian Sea on the Mangyshlak plateau (Mangystau), in the North-East it borders with Atyrau and Aktobe regions, in the South with Turkmenistan, in the East with Uzbekistan (Republic of Karakalpakstan).

In the North of the region, there are extensive salt-marshes of the Caspian lowland, the southern part is occupied by the Mangystau mountains, Ustyurt plateau, Mangyshlak and Kenderli-Kayasanskoe [6, 7].



Figure 2. Mangystau region

Source: (QGIS 2.16.2) Bing and [Kazakhstan location map.svg](#) (от [NordNordWest](#))

Mangyshlak Peninsula is washed in the West by the Caspian sea, which forms deep bays: Dead Kultuk, Mangyshlak, Kenderli, Kazakh. In the Caspian sea, there is a group of five Islands called Seals, with a total area of 130km².

Most of the Peninsula - shell plains, solonchaks, Aktau ranges (white mountains) and Karatau (black mountains) - low mountains and ridges with desert, semi-desert, and steppe vegetation [8].

The Peninsula is famous for its natural diversity: The desert landscape is replaced by mountain ranges, seascapes turn into plateaus with steep chinks, oases in stony gorges. It is on the Peninsula that the deepest depression in the CIS – Karagiye (132 meters below sea level) [6, 8].

The variety of soil causes the formation of a peculiar flora. There are about 263 species of plants on this territory. The reptile class includes 22 species. The Peninsula is home to 45 representatives of the class of mammals. The main symbol of the Peninsula is the Caspian seal, the smallest member of the seal family, endemic to the Caspian Sea. There are about 111 species of birds on the territory, including transient birds [9].

The Ustyurt plateau occupies a vast area between the Aral and Caspian seas and represents, rocky surface bounded by the cliff — a steep, inaccessible cliff up to 150 m high (the Eastern chink, facing the Aral sea, reaches 190 m). The absolute heights of Ustyurt in most of its area exceed 300 m, in some places up to 370 m, and the surrounding area-about 150 m. The plateau is composed of limestone from the surface, dolomites are also exposed in the cliffs, and gypsum crystals sparkle under the bright rays of the sun. The cliff stretches for hundreds of kilometers in a continuous meandering line, it is particularly pronounced on the Eastern edge of the plateau, and the Western chink; The Northern cliff is less clearly defined; in the South, the cliff is not visible everywhere. Under the influence of erosion and karst, the chinks gradually shift, taking away new areas from the plateau, but this process is very slow due to the dry climate [10]

Ustyurt limestone has a lot of shell inclusions, and some of their layers are a real and solid shell rock. Other witnesses of ancient geological processes are the so-called stone balls, iron-manganese spherical concretions that are usually formed on the seafloor, at great depths [11].

The flora and fauna of the Ustyurt plateau are typical for other similar regions of the Earth. Grasses are mainly different types of sagebrush, but most of all there are semi-shrubs, saxauls are quite common. However, in the spring, in a very short period (and not every year), you can see a blooming Ustyurt. Among the mammals are dominated by rodents, mainly small — gerbils, ground squirrels, jerboa. There are several types of snakes, lizards, and Central Asian tortoises. There are argali, wolves, foxes, corsacs, tolai hares, hedgehogs, and jackals that sometimes come from the South. The plateau is home to two rare and protected species of cats the leopard and the caracal. The main beauty of the Ustyurt fauna is saigas, whose population is now under threat. Large representatives of the world of birds — vultures and eagles, owls, other species of birds a little mostly different types of sparrows and pigeons [12, 13, 14, 15].

The most important discovery is that in ancient times these places were not deserted, in the middle ages part of the Great Silk Road passed here, from Khorezm-to the Emba, the Caspian Sea, and the lower reaches of the Volga. An impressive number of neglected cemeteries, which are identified by towering over them the mazars — the tombs and underground temples. The most famous are the relatively well-preserved remains of the

ancient Shahr-I-Wazir. Traces of other settlements have already been discovered, but not yet explored. Archaeologists have discovered more than 60 Neolithic sites and remains of settlements of Scythian-Sarmatians of the III-IV centuries [16, 17].

An amazing find on the Ustyurt plateau is its "arrows" (arans), which many compare with the famous images on the surface of the Earth in the Nazca desert. "Arrows" are laid out of crushed stones on the ground; giant signs in the form of triangles with sides of about 100 m really resemble arrowheads. They are completely visible only from the air, so they were discovered recently, during aerial photography in the late 1970s.

In 1983, 70 stone figures of warriors from one to almost four meters high and heads carved out of limestone were found near the Beite wells [16, 18].

1.1.3. Ustyurt nature reserve

Ustyurt state nature reserve (Fig. 3) was established on July 12, 1984. The reserve is a regional research institution and belongs to the state nature reserves that have the highest category of specially protected territories of national significance.



Figure 3. Ustyurt state nature reserve
Source: (QGIS 2.16.2) Bing and Google com/maps

Ustyurt state nature reserve is located in the Eastern part of the Karakiyansky district of the Mangystau region, with a total area of 223.342 ha. The Western part of the Ustyurt plateau is composed of cliffs and slopes, like the mountains of Karagan bosaga, Kokesem, kendirli and Elshibek, and from North to South it is surrounded by the Karynzhyryk Sands. Absolute height - from 50 to 3000 m. The protected area is 56.8 thousand hectares. [19,20].

Due to the variety of terrain and soil the plant world is also distinguished by its diversity. Currently, 336 species of higher vascular plants and 40 species of lower plants are registered on the territory of the reserve. The most common shrubs are various species of sagebrush,

biyurgun, sarzasan. Among the rare shrubs there is saltwort. Black saxaul grows among tree species [9].

There are also 29 species of mammals, 166 species of birds, 15 species of reptiles and 1 species of amphibians. Avifauna is represented by larks, wheatears, several species of birds are listed in the Red book, and among them, there are flamingos, peregrine falcons, vultures, steppe eagles, and owl.

Mammals include the Ustyurt moufflon, gazelle, caracal, manul, honey badger, leopard; amphibians include the green toad; herpetofauna includes lizards, snakes, and turtles [20].

Cliffs of Ustyurt are an interesting geological object. It is here on the surface that you can see layers of stones formed in the distant past. According to geologists, the system of depressions and cliffs rising above them is a continental rift, a crack in the earth's crust, with a length of 1000 km. The modern appearance of the plateau was formed about 10-20 thousand years ago, as a result of repeated offensive and retreats of the ancient sea.

Silts of the Permian period are represented in the Karamay mountains, which stretch parallel to the Ustyurt chink among the shores of the Karynzharyk depression. The folds of ancient rocks are colored from black and grayish-pink to maroon, among which you can find fossilized remains of plants [20, 21].

Ustyurt nature reserve has every chance to be included in the list of UNESCO world natural heritage sites. He has incredibly beautiful and majestic natural landscapes the cliffs, canyons and outcrops, inselbergs. Unique geological, paleontological, and archaeological sites are located on its territory. Ustyurt plateau is a key habitat for a number of species listed in the Red books of various levels. Since 2013, a group of experts from Kazakhstan, Russia and Germany has been working to nominate the reserve for the status of a world heritage site. An important project being implemented in this area is **Central Asian* Desert Initiative** (CADI) [22] (*Central Asia is a vast region of Asia that does not have access to the ocean, which includes Kazakhstan, Uzbekistan, Kyrgyzstan, Turkmenistan and Tajikistan). The success of this project will help preserve the biological and landscape diversity of the Ustyurt plateau, as well as contribute to the development of eco-tourism in Kazakhstan. The government of the Republic also plans to expand the territory of the reserve [11].

1.2. The state and development prospects of ecological tourism in Kazakhstan

In Kazakhstan ecotourism developed in fragments, within the framework of recreational and tourist activities and had a spontaneous character. The law "on tourism" adopted in 1992, which outlined the legal, economic, social, and organizational tourism foundations and tourism activities in Kazakhstan, did not define the role and significance of eco-tourism [23].

In 1993, based on the Decree of the Cabinet of Ministers of the Republic of Kazakhstan dated October 7, 1992 No. 829, the "National program for the tourism industry development in the Republic of Kazakhstan" was developed, aimed at attracting foreign partners, private

capital and foreign investment in the design and construction of tourist zones and facilities through one-time and long-term contracts [24]. Although today several provisions of the program have not lost their relevance, it is necessary to develop new program documents that take into account the current state, nature, and direction of development of all tourism types, including environmental tourism.

The main factors which reflect the formation of eco-tourism in Kazakhstan is only at the initial development stage are the following: lack of a state program (scheme) for the development of eco-tourism and therefore its state support; lack of long-term planning for the territorial ecotourism development in various natural areas of the Republic; lack of the legal framework development for eco-tourism; the significant discrepancy between the level and package of services offered to the consumer and international requirements and standards; departmental disunity in the organization of ecotourism and, consequently, in the management of ecotourism infrastructure. Small companies that offer nature tours are not able to conduct real marketing with market analysis and advertising organization; lack of conditions that encourage private investment in the industry, including from abroad [25]; lack of ecological tourism infrastructure, developed and functioning tourist routes, well-maintained ecological trails, as well as accompanying facilities for accommodation, service, trade, food, etc.; lack of scientific support for ecotourism aimed at identifying and evaluating natural and cultural resources, developing scientific approaches to organizing and managing ecotourism; lack of a well-developed state program and information and advertising support system and promotion of ecotourism products in the domestic and foreign markets, ensuring the creation of an attractive tourist image of Kazakhstan [26,27].

Although the Republic of Kazakhstan was admitted to the world tourism organization in 1994, information about the potential of eco - tourism in Kazakhstan - natural resources, culture and history of Kazakhstan-in developed countries is minimal.

Routes that are used spontaneously do not have the appropriate infrastructure, there is no established system of training for a reception, environmental education of visitors and the local population, which causes the depletion and degradation of natural resources, low transport accessibility of ecotourism facilities located mainly on a considerable distance from existing highways and roads; lack of established international relations in the field of ecotourism and international experience in its organization [28,29].

The Republic of Kazakhstan is undergoing the extractive industry and extensive agriculture intensive development. Many natural components of the environment are anthropogenic disturbed in Kazakhstan: air basin, watercourses, and reservoirs, land resources, flora, and fauna. Violation of the regional and local ecosystems balance, neglect of engineering and environmental requirements in the use of natural resources have led to the fact that on the Republic territory, technogenic factors have become decisive in the formation of environmental disaster zones. In this regard, the corners of nature that are almost untouched by human activity are of particular value. The Republic's entry into the world economic system also determines its inclusion in such a global, objective and economically priority phenomenon as eco-tourism, it allows combining the protection of natural values with the simultaneous development of the state's infrastructure.

Currently, in Kazakhstan, as well as throughout the world, the demand for eco-tourism is steadily growing. The reason for this is the uniqueness and relatively good preservation of natural landscapes located in the center of the Euro-Asian continent, at almost equal distance from all the oceans, in the place of convergence of floral areas, migration of animals, and flight of birds. These factors have led to the presence of a significant number of eco-tourism facilities here. Although the current state of ecotourism in Kazakhstan is characterized by extreme contrariety. On the one hand, a large and complex socio-economic order for the organization of eco-tourism in the Republic as a new branch of economic activity of the state has been clearly identified. On the other hand, the development of this direction faces serious difficulties [30].

1.3. Ecotourism in the Mangystau region. Potential of the territory

Ecotourism is travel to places with relatively untouched nature, where, without violating the integrity of ecosystems, you can get a representation of the natural and cultural and ethnographic features of this territory, that create such economic conditions that nature protection becomes profitable for the local population [6].

The Mangystau region territory is poorly studied in recreation terms and is mainly limited to reports on the tourist companies activities. In this regard, much attention is paid to the study of natural, cultural and historical recreational resources as well as socio-economic, material and technical conditions for the development of eco-tourism in the region [31, 32].

The Mangystau region recreational specialization is determined by the natural conditions peculiarity. The region's position in the desert zone makes it exotic, and the presence of the Caspian Sea increases its recreational attractiveness [33].

For the ecotourism purposes it is of considerable interest;

- As an object of acquaintance with the peculiar nature of the natural features of the region for educational tourism;
- As an object of study this region for groups of scientific tourism;
- As an object for the historical tourism development;
- As a fertile area for sports tourism.

Water objects in the tourist and recreational sphere perform many different functions:

- Water can be a strong healing and health-giving factor. The reserves of medicinal mineral waters available in the Mangystau region are used for drinking and balneological treatment;
- Also, the presence of water in the landscape significantly increases the emotional perception of nature. In this regard the Mangystau region is in a favorable position compared to other regions of Kazakhstan;

- Almost all tourist recreation centers of the Mangystau region are located close to the sea.

As a result, we can say that the region has wide opportunities for the many types of water recreation development, tourism, and water sports due to the presence of the sea with favorable hydrological and temperature conditions, the presence of sandy beaches and recreation centers.

On the Mangystau region territory, there are extensive protected natural territories, where all types of economic activities that entail changes in the natural course of natural processes, including the use for recreational purposes, are excluded or maximally restricted.

World experience shows that ecotourism in well-managed protected areas does not represent a serious threat to natural complexes; moreover, it contributes to a better public understanding of the challenges facing such territories [4, 33]. The lands of the Mangystau region environmental Fund include the Ustyurt state reserve, the Karaganda-Karakol, and Aktau-Buzachinsky state nature reserves.

The cultural and recreational potential of the Mangystau region indicates that this territory has wide opportunities for the scientific and educational directions development in environmental tourism, thanks to the preserved architectural monuments, cultural traditions, and customs of the local population.

The development of ecotourism in the Mangystau region is influenced not only by natural and unique cultural and historical recreational conditions but also the socio-economic state of the region, the material and technical base of tourism, and the demand for recreational resources.

In general, on the Mangystau region territory, the following areas of eco-tourism can be developed, which differ in the use type of natural, cultural and historical resources [4].

- **Educational tourism.** It is manifested in the tourist's visits to natural and cultural-historical sites of the territory, as well as photo and video shooting of exotic and rare animals. The potential of educational tourism can be interesting natural territories, representatives of flora and fauna, typical and unique landscapes, monuments of material culture, and history.
- **Scientific tourism.** It combines the types of archaeological, biological, paleontological, and ethnographic tourism, for the development of which there are natural and socio-cultural prerequisites in the Mangystau region.
- **Sports tourism.** There are opportunities for the development of mountain tourism, climbing, orienteering, cycling, paragliding, parachuting, sailing, and horse riding in the region.
- **Water tourism.** It includes excursions on sailboats, catamarans, water skiing, swimming, and recreation on sandy beaches.
- **Extreme tourism.** A type of ecotourism associated with certain physical activities, with the strengthening of physical health. On Mangyshlak can be represented by trips to remote and unsuitable areas for human habitation, deep-diving dives, etc.

- **Medical tourism** is represented by balneological, resort therapy, as well as climate treatment.
- **Religious tourism** is represented by a pilgrimage to holy places.

In addition, the Mangystau region, thanks to its location, plays an important role in the development of country international relations. In general, this has a positive impact on the tourism industry. Its development involves researching various areas, including such an important part as the study of consumer preferences and tourists expectations. At present, there are changes in consumer preferences and consumers' behavior [34, 35].

Identifying opportunities for tourism development involves understanding tourists' needs and values, how to increase their satisfaction and loyalty. Ensuring the tourism industry economic growth is achieved by identifying the consumer preferences of tourists and taking into account behavioral characteristics to the maximum possible extent [36].

The importance of tourists needs studying is actualized by the fact that currently consumers of tourist products and services are represented by different categories which should be studied to establish the optimal trajectory of development in the field of tourism [36, 37].

The purpose of the study is to determine the preferences of European tourists and tourist organizations, as well as related services that are important for them when traveling in the Mangystau region. Make recommendations based on the received data.

2. Methods

To achieve this goal was conducted a marketing study. The survey method is selected as a tool for collecting information [38].

A search was conducted for European tourists or travelers interested in Central Asia and Kazakhstan who were asked to fill in an anonymous questionnaire that combines a closed and open type of survey

To collect information from tourists, was used the online tool "Google forms". Some of the respondents were interviewed verbally, and most of the data was collected verbally with tourist organizations.

The survey for tourists' contains-23 questions of the test form and 14 questions for determining the importance of the services provided (Appendix 1). The respondents age started from 18 years old. The sample consisted of 51 respondents.

The survey for tourist organizations contains 11 questions of the test form and 10 questions for determining the importance of the services provided (Appendix 2). The number of tourist organizations that responded to the survey and agreed to cooperate was 5 out of 60.

The survey was divided:

- According to the circle of respondents, in our case
 - Private persons, i.e. tourists
 - Tourist organization
- By the number of simultaneously polled respondents
 - Sole
- By the number of topics included in the survey
 - Ecotourism in the Mangystau region of Kazakhstan, including Ustyurt
- The frequency of the survey
 - Single
- The level of standardization
 - Structured

3. Results

3.1. Tourist organization. The survey.

Out of 60 tourist organizations focused on Central Asia, 5 organizations from countries such as Germany, the Netherlands, Switzerland, and England were interested in cooperation, which took part in the survey. Based on the answers, we can draw certain conclusions.

A survey among these tourist organizations showed that the eco-tourism development in Kazakhstan is very important for each of them. And the most attractive for them are nature and landscapes, people and culture, history and archeology, all of which are rich in the Mangystau region, the category of cities and architecture was the least attractive for organizing tours. It should be noted that absolutely each of these organizations considers the Mangystau region an attractive territory for European tourists. All five organizations supported the development of active tourism. And considering the options for tours that should be organized in this territory, everyone was most interested in bird watching, watching to animals, as well as in botanical tours. The next attractive destination chosen was complex landscape tourism, then, the photo-tourism and in last place tourism organizations were interested in establishing scientific tours and volunteering.

It was important to find out who the respondents were willing to cooperate with, so this question was added to the survey. Three out of five would prefer to cooperate with environmental non-governmental organizations (NGOs), while the rest chose tourism organizations.

One of the questions asked to the respondents was about their readiness to increase the cost of tours with the condition that part of the funds will go to environmental protection, but the Kazakh organization that cooperates with them must submit a report on the funds spent. Four of them agree with this, and one expressed doubts about this possibility.

Respondents noted important factors when choosing a partner organization, for everyone the quality of service is important, then the organization reputation, then the environmental orientation and staff qualification.

Also, in this survey, it was important to identify the reasons why cooperation with Kazakhstani tour organizations is deteriorating. As it turned out, the main reason is the low services quality provided, further, low staff qualifications, poor sightseeing program/lack of advertising, and poor management.

In addition, it was necessary to indicate the importance degree of certain characteristics, what is important when choosing partners, and which is important when organizing routes on the proposed territory. The result is the following data (table 1):

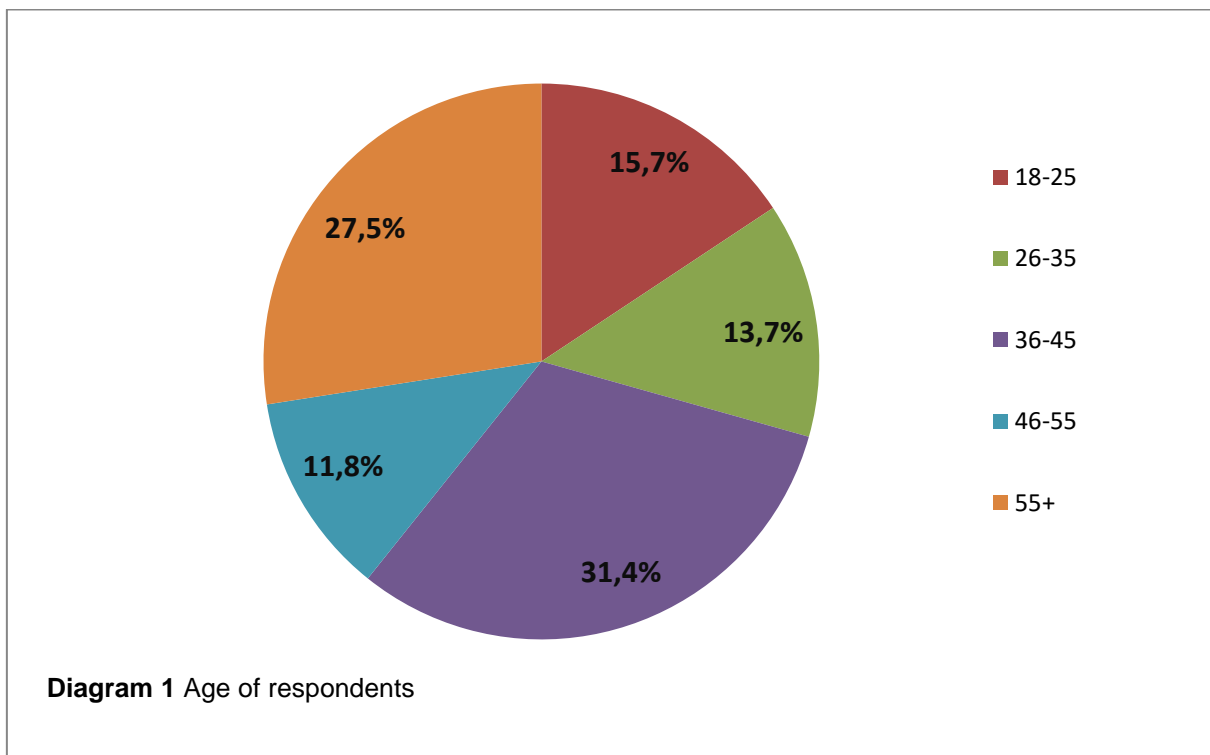
Environmental orientation of cooperating organizations	For organizations: 2 – very significant 2 – significant 1 – neutral
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Development of routes that reduce the ecological footprint	For organizations: 3 – significant 1 – very significant 1 – neutral
Tours for traveling with children	For organizations: 3 – significant 1 – very significant 1 – absolutely not important
Attracting local communities to tourism	For organizations: 3 – very significant 2 – significant
Provision of locally produced products	For organizations: 1 – very significant 4 – significant
Involving PAs in joint cooperation	For organizations: 1 – very significant 2 – significant 2 – neutral
Availability of cultural and historical places of Mangystau	For organizations: 1 – not important 4 – significant
Untouched natural sites	For organizations: 3 – very significant 2 – significant
Equipment for hiking trails and campsites	For organizations: 1 – absolutely not important 2 – significant 2 – very significant
Availability of routes with viewing deck	For organizations: 1 – very significant 1 – significant 1 – not important 2 – absolutely not important

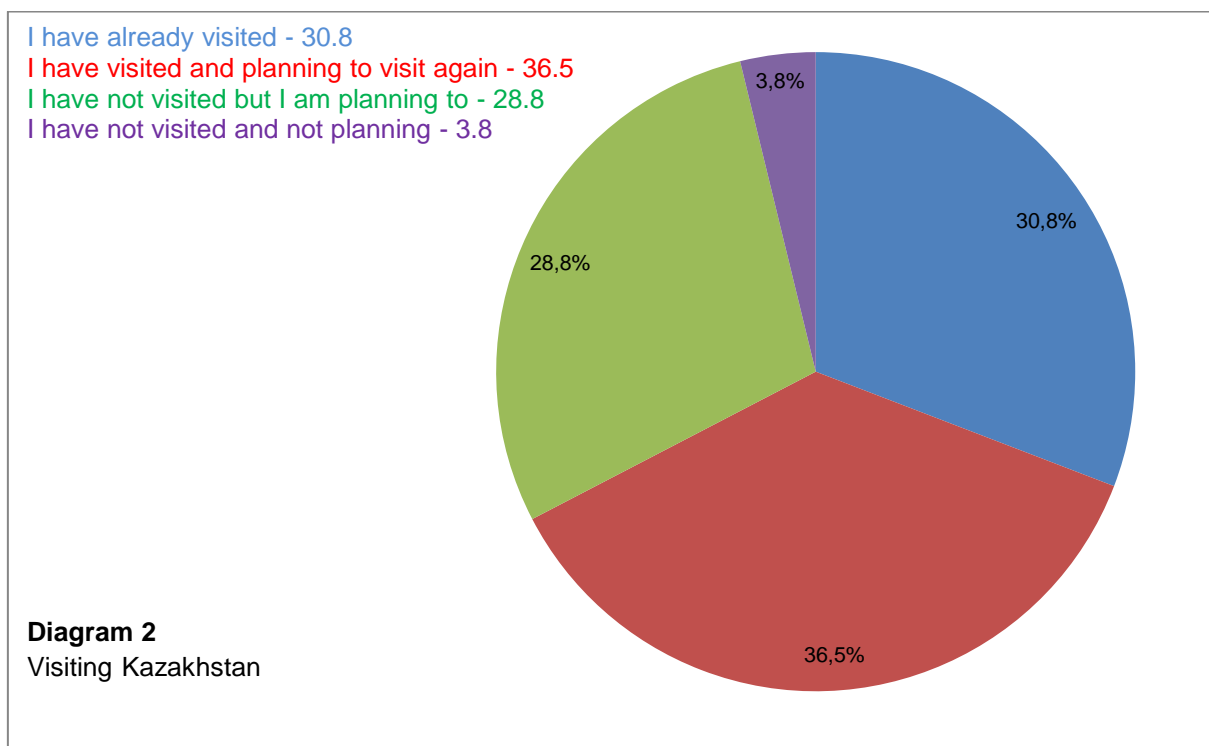
Table 1. The importance of the following characteristics

3.2. Tourists. The survey.

It is planned that the main consumers of this product will be foreign tourists; therefore, conducting a survey among these respondents was a very important work element. Out of a total sample of 51 people, 23 respondents were men and 28 women. Age of respondents from 18 years and older (diagram 1).



The majority of respondents were from Germany, and tourists from Austria, Finland, Italy, Spain, the Netherlands, Moldova, Norway, Romania, Switzerland, and the United Kingdom also took part. For the survey, we deliberately tried to choose tourists who are interested in Central Asia and Kazakhstan (diagram 2).



Tourists chose nature and landscapes, culture, history, and archeology as the main attraction factor. Based on the responses, we know that respondents would prefer to travel with friends, in pairs, or alone.

For 50 of the respondents, it was important to develop sustainable eco-tourism in the visited territory.

As the most attractive destinations in the Mangystau region, respondents chose: active tourism (trips, hiking, and adventure), educational tourism (museums, exhibitions, excursions), the least popular was passive tourism. A small part of the responses was in favor of mixed tours. And when choosing between the tours types that can be organized in this territory, the respondents indicated complex tourism, photo tourism, and tourism focused on the fauna and flora of the area. Also, 50 of tourists showed a desire to visit the territories of nature reserves and PAs, 37 of them are interested in visiting historical sites of the region. For most of the respondents, it is important to visit untouched natural areas, many people are willing to pay more for visiting such territories, but on condition that the finances really go to preserving the environment.

It is important to support the local population, and since the traditions and customs of the Kazakh people are perfectly preserved on the Mangystau region territory, our respondents were asked about their interest in learning more about Kazakhs' life, and 47 responses were positive.

According to the number of days to travel in the proposed area the most popular options are: 1) from 7 to 10 days, 2) up to 7 days, 3) from 11 to 14 days. For the period of their stay in the Mangystau region, respondents would prefer to live in: 1) guest houses, 2)

yurts, 3) hotels, 4) tents. The following types of transport were chosen: 1) off-road cars, 2) mini buses, 3) horses/camels, 4) bicycles.

When planning a trip to this region, respondents would prefer: 1) organize your own trip, 2) contact the tour operator, 3) contact an NGO.

When organizing tours an important aspect is the information material development for tourists. For respondents, the most useful ones seem to be: 1) one brochure that combines all the information in conjunction with a map of the area, 2) program for devices with all data about the area, 3) the booklet is separate from the route map; all of the above should be as informative as possible.

When choosing a place and route to visit, respondents answered that it is important for them: 1) recommendations from friends and reviews from tourists, 2) overall place popularity, 3) publicity and information content, 4) unique and untouched nature.

And the reasons for the decline of interest in Kazakhstan traveling are shown in chart 1.

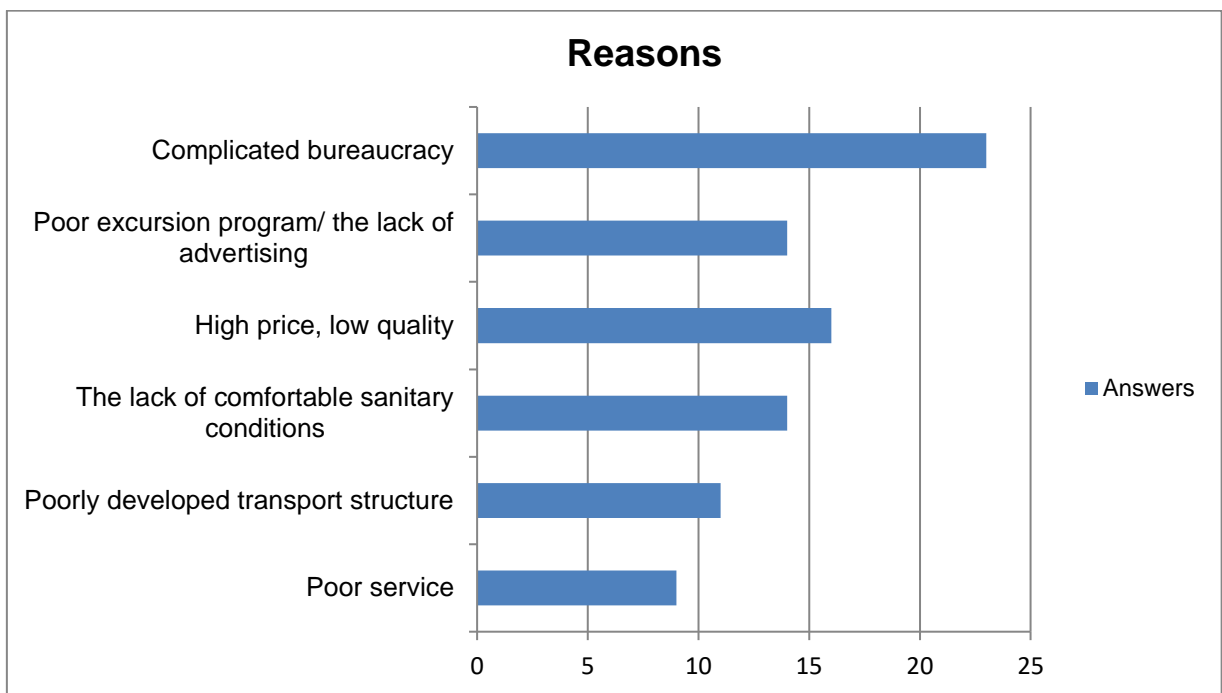


Chart 1. Reasons that prevent you from traveling to Kazakhstan

According to the importance characteristics degree of the services provided during a tourist trip to the Mangystau region, the answers of respondents are shown in chart 2.

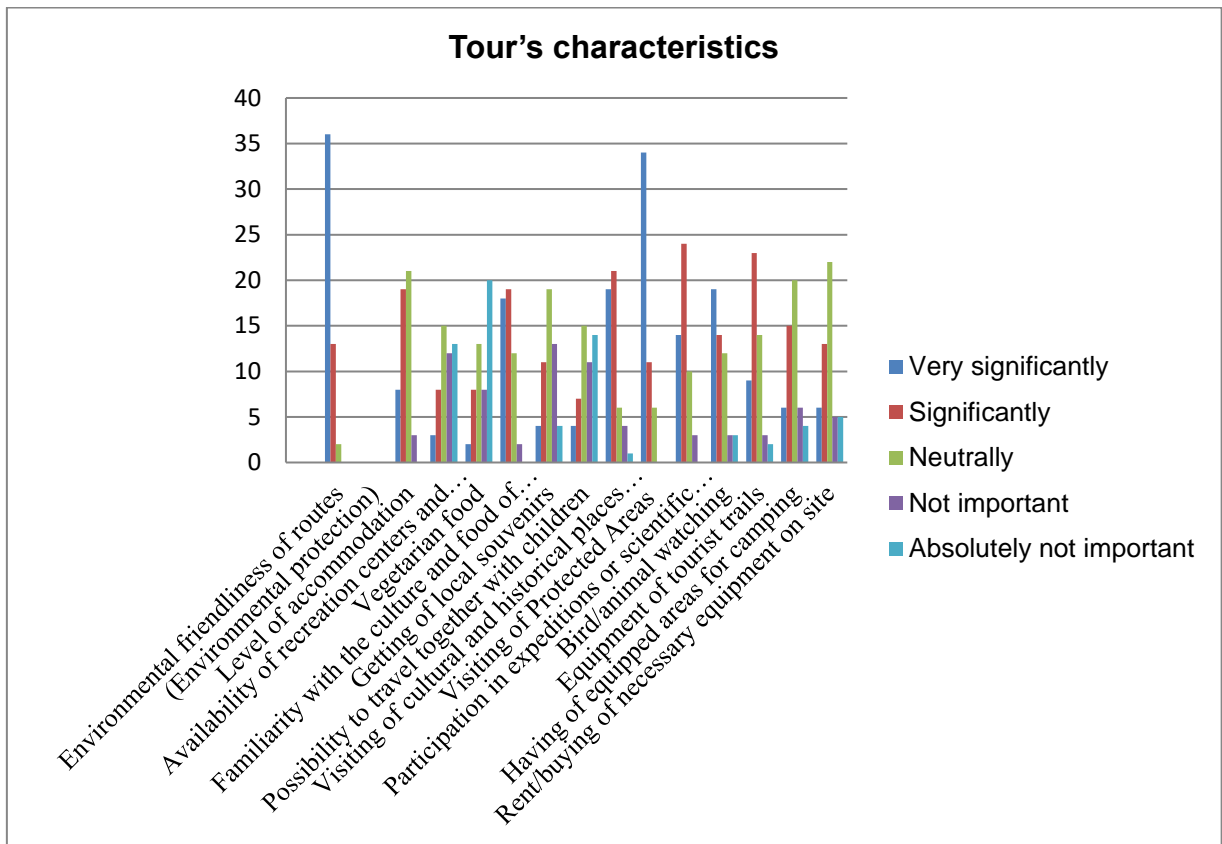


Chart 2: Environmental friendliness of routes (Environmental protection);
 Level of accommodation; Availability of recreation centers and sanatoriums;
 Vegetarian food; Familiarity with the culture and food of the Kazakhs;
 Getting of local souvenirs;
 Possibility to travel together with children;
 Visiting of cultural and historical places of Mangystau;
 Visiting of Protected Areas;
 Participation in expeditions or scientific works in the Ustyurt Nature Reserve and regional
 Protected Areas;
 Bird/animal watching; Equipment of tourist trails;
 Having of equipped areas for camping; Rent/buying of necessary equipment on site.

4. Discussion

The entry of tourist flows into the Mangystau region shows that it remains insufficiently attractive for foreign tourists [39]. With its uniqueness, the tourist product is not competitive enough and loses to foreign analogs in terms of availability, level of service, and price of tourist services. To create and implement a tourism development program in the region, we need to understand what is the most attractive and has perspectives for development.

4.1. Tourist organizations.

Based on the obtained results, we can draw conclusions about the travel companies interest to work in this direction and readiness to cooperate with Kazakh organizations that should be able to create and maintain a high-quality product.

As can be seen from the results presented above, the surveyed travel companies are more supportive of the eco-tourism development in the Mangystau region. Since this region is very attractive for its nature and landscapes, well-preserved traditions and Kazakhs' customs and, of course, historical monuments. In this sphere, Mangystau region is the richest Kazakhstan, there are more than 300 archaeological sites, thanks to which it is attractive for travelers. And this is well understood by many travel companies.

There is a high desire of the surveyed companies to work on the territory under consideration and to develop active tourism aimed at getting acquainted with the fauna and flora of the area, landscapes, to participate in research works, and photo tours are particularly popular. For local residents, organizations of the region and Ustyurt nature reserve, eco-tourism can become very important, since the region development and the population will be observed, economic condition improvement, the preservation and development of PAs as interesting natural areas. But at the same time, it is important to convey that the eco-tourism goal is to harmonize people with nature, to get acquainted with the environment without violating the ecosystems integrity. And only, in this case, will be possible the financial improvement.

The fact that European tour operators are ready to cooperate with Kazakhstan environmental NGOs gives such organizations a great opportunity to develop in this direction and really minimize the impact on the environment since this is their direct goal. In addition, many European organizations have a positive view of increasing the cost of tours, with the condition that part of the proceeds is spent on environmental projects. Local environmental NGOs are more likely to be involved in such projects; they are more interested in the local nature preservation, are familiar with the area features, and can guarantee the funds direction in the necessary route. A significant advantage for such organizations will be that their development in this area gives them the prospect of obtaining their own funds for functioning and conducting research, regardless of donors, to which they can also attract tourists. Interested in this cooperation are Association for the Conservation of Kazakhstan Biodiversity (ACBK) and environmental NGO "Tabigi Orta", both have

offices in the Aktau city Mangystau region, they know the terrain and ecosystem features, and are committed to preserving the environment. They will be given the accumulated contacts and survey data.

It was important to get information on the main characteristics of European tour organizations when choosing partners. In the future, those who want to cooperate with Europe will work to improve the quality of service and staff qualifications both on the part of eco-NGO and on the part of travel agencies, in order to enter the global market, Kazakh organizations will adapt to the agreements and will pay more and more attention to their reputation. Since at the moment, the lack of effective management, quality services, and professional guides leave not the best impressions about the country as a whole and lead to the destruction of only nascent tourism and cooperation.

4.2. European tourists.

From the survey of European tourists, it becomes clear that they are quite familiar with Kazakhstan and the territory offered to them. And since the Mangystau region has preserved many customs of the Kazakhs, as well as abounds in unusual landscapes, interesting nature and ancient historical monuments, including those that remained after the Great Silk Road, it is quite capable of providing a competitive product, using everything, what is attractive for European travelers.

The survey makes it clear what the tourist expects from the visited place and that this region has great potential and can implement the incoming requests. The interest development of all ecotourism areas and types is absolutely real since the territory initially has the necessary resources and can provide product coverage from young children to pensioners, serve a large people number at a time and be interesting for men and women.

The survey also once again confirms that nature reserves and other natural areas have a special attraction for visitors. It is an important task to convey this fact to local governing bodies and people.

It is not surprising that a foreign tourist seeks to plunge into the culture of the visited country as much as possible, as noted by each respondent. It was important for the majority to get acquainted with the Kazakhs' life, and almost every tourist expressed a desire to visit, or rather live in a yurt. The second most frequent response was a guest house, hotels were chosen only by very adults. This suggests that the ordinary Mangystau region population can organize this service and sell it to visitors. Even the creation of sites for the tents installation will be within the the local population power, and taking into account the fact that the majority of respondents would like, on average, to spend 5-10 days in this region, the demand should be for such services. In addition, given the long distances between attractions, local residents can provide transport services in the form of off-road cars and minibuses, and for a shorter distance – horses, and camels, some respondents were not against using bicycles. All this should be quite important for the local population since most tourists prefer to organize their own trip, guided by the reviews of other people.

As it turned out, European tourists, on average, are ready to spend about 800 Euros for their short stay in the Mangystau region, excluding transport tickets. But, of course, the purchased service must be of high quality: 'The main respondents' wishes are thoughtful routes, comfortable accommodation, highly qualified guides who speak at least English and delicious food. The survey also showed that at the moment, poor service in Kazakhstan, namely the low quality of provided services, unqualified staff, lack of transport system, unsanitary conditions and at the same time a significant increase in prices for foreigners, act as repulsive factors. But one of the main reasons respondents pointed out is bureaucracy, which reduces the desire to visit Kazakhstan and its regions. All this is an indicator that the state system is not well-functioning and is not able to keep tourists who rarely appear, as well as to attract new travelers.

4.3. Recommendations

It should be taken into account that Kazakhstan is currently in an active and growing competition for investment, information flows, and people as professionals and tourists. A convenient geographical location or an abundance of unique natural and cultural resources do not guarantee economic success and a continuous flow of tourists. Tourism, like any other business, has become globalized: customers compare and share reviews. It is necessary that the product is constantly progressed and improved.

Based on the obtained results and based on the state policy for the tourism industry development in Kazakhstan for the period 2019-2025, we can identify some recommendations that can contribute to development in this area.

1. It is necessary to work together with local authorities, tourism organizations, and the state to build an effective strategy and approaches for the tourism industry development and management of territories.
2. Creating a single tourism product, a general objects scheme in the visited area.
3. Development of tourist infrastructure. Tourists are dissatisfied with hotels, museums, and other Soviet-style objects that have long been outdated and are not worth the amounts they are asked for. Accordingly, the development of new hotels, recreation centers, establishing a transport system and leisure facilities should become one of the priorities of local authorities and travel agencies.
Trails and camps must be designed to meet environmental and cultural requirements. It is better to create visitor centers and campsites of the most natural type according to the local landscape, and route restrictions should be such that visitors feel that it was not created by human hands.
4. Develop the concept of all-season tourism. Mangystau region is one of those that can accept tourists in any season. Although taking into account the frequent winds and sometimes low temperatures in winter, it is quite possible to develop seasonal routes in this area, which will be popular, for example landscape tourism, sports, or research on the bases of PAs.
5. Change the direction of the tourist organizations work to a more ecological one. Develop routes that minimize the impact on the environment. The survey shows

that this criterion is very important for almost every European organization and tourist. At a time when society is becoming more conscious and an ecological lifestyle is becoming important, it is necessary to follow in this direction and support it.

6. Organizing programs to preserve or support natural areas as untouched as possible. Wild nature without anthropogenic impact is the most attractive for travelers; many people want to go to such places for a vacation from megacities or to get acquainted with the local flora and fauna. For example, Saiga population or an endemic Caspian seal can become symbols of the region and be desirable objects for observation or photo hunting, respectively, their preservation and multiplication should be a priority.
7. Cooperation with the Ustyurt state reserve and local PAs. This will attract tourists, as nature conservation areas have always been attractive sites. It will also provide financial support to the PAs; attract the attention of the simple people to the nature conservation problems, especially when they realize that it is possible to earn money without destroying the ecosystem. At the moment, the Ustyurt Reserve can already offer two developed tourist routes.
8. Provide a choice of tourism types. Based on the survey results, it is clear that, although the majority is interested in active tourism, but at the same time, the respondents were not against educational tourism, and the age group of respondents also noted passive. The potential of Mangystau is sufficient for this. Accordingly, it is worth giving a choice to both young travelers and families with children and pensioners.

For active tourism, the most profitable options will be:

- Bird watching;
- Animal watching tours;
- Botanical tours;
- Landscape tours;
- Photo tours;
- Sport tourism;
- Research volunteer tours;
- Diving;
- Aquatics;
- Riding.

For educational tourism:

- Museum and exhibitions;
- Historical or archaeological tourism;
- Fairs;
- National celebrations;
- City tour.

For passive tourism:

- Making national souvenirs masterclasses;
- Cooking national food masterclasses;
- Health resorts;
- Tours along the Caspian Sea coast.

9. Involvement of local population in tourism development processes. Conducting training courses will allow local people to learn more about tourism activities, the services' quality provided, attracting tourists, and getting benefits from travelers in their region. The organization of such works is extremely important, understanding the tourism sector structure and providing quality services will give the local population economic benefits, which will save the government from discontent in the future. Aside from creating additional work places, local people can be attracted to firms on the basis of one-time/seasonal contracts; the government should also train them to provide their own services.

For example, the local population is quite capable of:

- In addition to the off-road cars and buses, respondents would like to take some routes on horseback or camels; some are interested in the possibility of using bicycles.
 - To provide housing. Almost all respondents would prefer to live in guest houses or yurts; it is cheaper than hotels and gives an opportunity to get to know better the local people culture. The creation of such housing or even sites for tents of travelers can bring benefits to the population.
 - To be national dishes producers or other local products. Local residents can enter into contracts with firms and be service providers or engage in sales independently.
 - To make local souvenirs. This can be national jewelry, clothing, musical instruments, and products directly related to the reserve and local nature.
 - Lease of equipment. This can be both equipments for trips around the area, and equipment for vacationers by the sea.
10. Provide guides and translators. The lack of highly qualified personnel is a big problem for the country as a whole. Almost every respondent indicated this as one of the main reasons for not visiting Kazakhstan. Low staff qualification: lack of knowledge of the area, history, nature, inability to answer tourists' questions, and interest them on the route, poor English knowledge. All these factors reduce demand. Therefore, tourism organizations need to select high-class specialists and provide them with the opportunity to improve through additional training domestically and abroad.
 11. Informativity. Data about tours, routes, territory, and other trip components must be provided in full. Respondents said they had insufficient information, they cannot fully judge the provided product. All information should be contained on the tourist organization website, in a booklet with a good route map. Also respondents

expressed a desire to use the program for mobile phones, which will be convenient for everyone and reduce the paper products use.

It should be remembered that the tourism object is not a separate state within state. It is necessary to solve problems comprehensively with settlements, infrastructure, service points improvement, an effective organizational model, involving the local population, training hired personnel, etc. This is the responsibility of the authorized governing bodies and akimats, as well as the joint work of tourism organizations.

The tourism objects development as separate elements occurs only in those countries where all the above issues have already been resolved and the business has a clear picture and rules. Unfortunately, everything is much more complicated for us.

5. Conclusion

As a research result, it was revealed that, despite the uniqueness of the Mangystau region territory, there is still an undeveloped system of ecological and any other tourism. Theoretically, you can organize a large selection of different tourist destinations. But there are a number of reasons why this place still can't provide a quality product and attract tourists and travel companies. These reasons include the lack of an effective tourism development strategy, the lack of approach to the industry development and territory management, the lack of highly qualified staff/guides/translators.

Also, based on the study results, it was found that:

- European tourists show great interest in the Mangystau region. They are attracted by the landscape, nature, culture, and history of the region;
- Tourists from 18 years old are interested in the Mangystau region, men and women are almost equally interested, all respondents are working people, respondents would like to visit the region: 1) with friends, 2) in pairs, 3) alone;
- The eco-tourism development is important for tourists and tourism organizations. Untouched nature is an important criterion when choosing a tourist destination;
- Tourists and travel companies have expressed a desire, as part of tourism, to visit the territory of the Ustyurt State Nature Reserve and local PAs;
- Tourists are most interested in active tourism: more precisely, complex landscape tourism, tourism focused on flora and fauna, photo tourism;
- The preferred stay period in the region is from 5 to 10 days;
- The most attractive accommodation for tourists, in the first place guest houses, yurts on the second, hotels on the third;
- Preferred transport: 1) off-road cars; 2) mini buses; 3) horses/camels;
- From the accompanying material on the route, tourists prefer to use a booklet combined with a high-quality map or a program with maps and complete route information on your mobile phone;
- The average amount that tourists are willing to spend when visiting the Mangystau region is about 800 Euros, excluding flights;
- Tourists and tourist organizations are willing to pay more when visiting Mangystau, provided that funds are spent on nature conservation;
- Important factors when choosing a partner organization for Europeans are: 1) service quality, 2) organization reputation, 3) environmental orientation;
- The main reasons hindering the eco-tourism development in the region from the tourism organizations point of view are: 1) poor quality of provided services, 2) unskilled staff, 3) organized programs poor quality;
- The main reasons hindering the eco-tourism development in the region from the European tourists point of view are: 1) bureaucracy, 2) high prices for low-quality services, 3) lack of comfortable sanitary conditions/ poor quality of organized programs;

However, given the region high potential and the local organizations desire to create a competitive product, it was recommended that the government authorities, together with local organizations that provide tourist services, create a plan for tourist places development. Create a single integrated product from tourism objects instead of working in separate places.

Change the direction of tourism to environmental: it is necessary to carefully select the territory and calculate the load exerted on it, conduct environmental awareness-raising activities, create strict behavior rules on routes that allow you to reduce the anthropogenic footprint as much as possible.

Cooperation with the Ustyurt nature reserve and the PAs will be beneficial for both sides; this should lead to the conservation and multiplication of the animal and plant world, as well as to the local population's functions understanding of these enterprises.

Conducting explanatory work with the local population, involving them in the trade turnover of the tourism sector. Locals should understand how this system works, and what benefits untouched nature can bring for them, in search of which tourists come.

Thus, the study results and recommendations are good to help Kazakhstan tourism organizations. These data were transferred to two Kazakhstani organizations (Association for the Conservation of Biodiversity of Kazakhstan and Tabigi Orta), for personal use and further joint work with European organizations.

In the region, attempts have already been made to create an ecological route for bird watching at a short distance from the city. Also, the organization director "Tabigi Orta" together with the staff is trained in tourism and is in constant collaboration with the local akimat.

It should be noted that tourism is a resource-intensive business that requires both financial and personal investments. Although it is possible to carry out basic activities with limited resources, local governments should still provide full support and participate in the ongoing work. Moreover, support for tourism in the Mangystau region is considered in the document on the tourism development industry in Kazakhstan for the period 2019-2025.

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Appendix 1. The survey for tourists

Gender_____

Country_____

Age_____

Occupation_____

Marital status_____

1. Are you planning to visit Kazakhstan?
 - a) I have already visited
 - b) I have visited and planning to visit again
 - c) I haven't visited, but I'm planning to
 - d) I haven't visited and not planning
2. Who do you usually travel with, and who would you like to visit Kazakhstan with?
 - a) Alone
 - b) In a pair
 - c) With the family
 - d) With the company
3. Is ecotourism important to you and do countries need to develop it?
 - a) Yes, it is
 - b) No, it is not
4. What type of ecotourism would you prefer when visiting Mangystau?
 - a) Complex landscape tourism
 - b) Photo tourism
 - c) Fauna and flora oriented tourism
 - d) Event tourism
 - e) Scientific tourism/ volunteerism
5. Would you like to visit Protected Areas and historical sites in Mangystau?
 - a) Yes
 - b) No
 - c) It would be interesting
6. Are you interested in getting acquainted with the culture and life of Kazakh people with the opportunity to participate in it?
 - a) Yes, I am
 - b) No, I'm not
7. Which types of tourism are you more interested in?
 - a) Educational tourism (excursions, museums, exhibitions)
 - b) Active tourism (hiking, trips, adventures)
 - c) Passive tourism (resorts, walks, picnics)
8. How many days are you ready to spend on a trip to Mangystau?
 - a) Less than 7 days
 - b) From 7 to 10 days
 - c) From 11 to 14 days
 - d) From 15 to 21 days

- e) More than 21 days
9. Which types of housing is the most attractive to you?
- a) Hotel
 - b) Guest house
 - c) National housing-Yurt
 - d) Tents
10. Which types of transport is the most attractive to you?
- a) Off-road car
 - b) Minibus
 - c) Bicycle
 - d) Horses
 - e) Camels
11. If you are planning to visit the Mangystau region, who will you contact for organization of your trip:
- a) An environmental NGO
 - b) A tourist operator
 - c) Organize your own trip independently
12. Is the untouched nature and rich biodiversity important to you, do you agree to pay more if you know that this money is used for nature protection?
- a) It's important, I agree to pay more for it
 - b) It's important, but I don't agree to pay more for it
 - c) It's no matter
13. Preferably, the introductory material should be:
- a) The booklet with maps of the route
 - b) The booklet is separate from the route maps
 - c) A program for mobile phones that includes all these
14. What do you pay attention to when choosing travel places?
- a) Reviews and recommendations of friends
 - b) Popularity of the visited places
 - c) Advertisement
 - d) Other _____
15. Reasons that prevent you from traveling to Kazakhstan
- a) Poor service
 - b) Poorly developed transport structure
 - c) The lack of comfortable sanitary conditions
 - d) High price, low quality
 - e) Poor excursion program/ the lack of advertising
 - f) Complicated bureaucracy
16. How much are you willing to spend on traveling to the Mangystau region (Kazakhstan)?

17. What additional services do you need during your trip?

Please, note the importance of the following characteristics:

Tour's characteristics	Very significantly	Significantly	Neutrally	Not important	Absolutely not important
Environmental friendliness of routes (Environmental protection)	5	4	3	2	1
Level of accommodation	5	4	3	2	1
Availability of recreation centers and sanatoriums	5	4	3	2	1
Vegetarian food	5	4	3	2	1
Familiarity with the culture and food of the Kazakhs	5	4	3	2	1
Getting of local souvenirs	5	4	3	2	1
Possibility to travel together with children	5	4	3	2	1
Visiting of cultural and historical places of Mangystau	5	4	3	2	1
Visiting of Protected Areas	5	4	3	2	1
Participation in expeditions or	5	4	3	2	1

scientific works in the Ustyurt Nature Reserve and regional Protected Areas					
Bird/animal watching	5	4	3	2	1
Equipment of tourist trails	5	4	3	2	1
Having of equipped areas for camping	5	4	3	2	1
Rent/buying of necessary equipment on site	5	4	3	2	1

Appendix 2. The survey for touroperators.

Name of organization _____
Country and city _____

1. Is the development of eco-tourism in Kazakhstan important to you?
 - a) Yes, it is very important
 - b) No, it isn't very important
 - c) It isn't important at all
2. What can attract you in Kazakhstan?
 - a) Nature and landscape
 - b) People and culture
 - c) Cities and architecture
 - d) History and archaeology
3. Is Mangystau region (Ustyurt) an attractive destination for adventure ecotourism for Europeans?
 - a) Yes, it is
 - b) No, it isn't
 - c) Your answer _____
4. What tourism destinations in Mangystau are of the greatest interest?
 - d) Active tourism (hiking, trips, adventures)
 - e) Passive tourism (resorts, walks, picnics)
5. What kind of ecotourism would you like to have in the Mangystau area?
 - f) Complex landscape tourism
 - g) Photo tourism
 - h) Fauna and flora oriented tourism
 - i) Event tourism
 - j) Scientific tourism/ volunteerism
6. Which organization would you prefer to work with:
 - d) Environmental NGO
 - e) Tourism organization
7. If the untouched nature and rich biodiversity important for you, can the payment for tours be higher on condition that the money will be spent on nature protection (with reporting)?
 - a) Yes, it can
 - b) No, it cannot
8. What is the most important factor for you when choosing a cooperating organization?
 - a) Reputation of the organization
 - b) Service quality
 - c) Staff qualification
 - d) Range of routes offered
 - e) Environmental orientation

9. Reasons leading to the deterioration of cooperation with Kazakh tourist organizations

- g) Poor staff qualification
- h) Poorly developed transport structure
- i) The lack of comfortable sanitary conditions
- j) Poor quality of services provided
- k) Poor excursion program/ the lack of advertising

Please, note the importance of the following characteristics:

Characteristics	Very significant	Significant	Neutral	Not important	Absolutely not important
Environmental orientation of cooperating organizations	5	4	3	2	1
Development of routes that reduce the ecological footprint	5	4	3	2	1
Tours for traveling with children	5	4	3	2	1
Attracting local communities to tourism	5	4	3	2	1
Provision of locally produced products	5	4	3	2	1
Involving PAs in joint cooperation	5	4	3	2	1
Availability of cultural and historical places of Mangystau	5	4	3	2	1
Untouched natural sites	5	4	3	2	1
Equipment for hiking trails and campsites	5	4	3	2	1

Availability of routes with viewing deck	5	4	3	2	1
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*If you are interested in cooperation with Kazakhstan to promote ecological tourism in the Mangystau region (Caspian Sea, Ustyurt, Mangystau)
Please, enter your contact information. Thank you!
