Digitalization of the tourism market in Kazakhstan: problems and prospects (transition from state management to private)

Beissembayeva Dilnaz

Mukatayeva Madina

Urazakova Malika

Submitted in partial fulfillment of the requirements for the degree of
Bachelor of Service Management
In Tourism

Maqsut Narikbayev KAZGUU University

School of Liberal Arts

10, June, 2023 year.

Word Count: [5956]

DECLARATION

We, the undersigned

Beissembayeva Dilnaz, Mukatayeva Madina, Urazakova Malika

grant to M. Narikbayev KAZGUU University the right to store and distribute my submission in print and electronic format.

We confirm that We are the sole authors of this senior project, and that it does not infringe any copyright. This senior project is the result of our own original work, except where due acknowledgement has been made.

M. Narikbayev KAZGUU University will clearly identify our names as the authors of the submission, and will make any alteration, other than as allowed by this agreement, to your submission.

We hereby accept the terms of the above Declaration.

Beissembayeva Dilnaz   *Beissembayeva D.*
  Authors' Surname, name   signature:

Mukatayeva Madina   *Mukatayeva M.*
  Authors' Surname, name   signature:
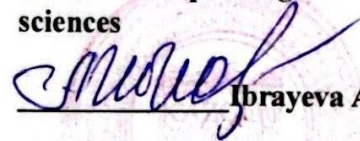
Urazakova Malika   *Urazakova M*
  Authors' Surname, name   signature:

June 10. 2023
  Date:

TECHNICAL
ASSIGNMENT
For Senior Project
Digitalization of the tourism market in Kazakhstan: problems and prospects
(Transition of state management to private).

I.   Justification of the relevance, originality, and novelty of the project.

In many countries tourism plays a significant role in the economy. According to official statistics from the website of the primeminister.kz according to the results of Q1 2022, the number of domestic tourists served by accommodation places increased by 121.5% compared to the same period in 2021, amounting to 1.13 million people (Q1 2021 - 931.1 thousand). However, unlike in other countries, the digitalization of the tourism market in Kazakhstan is mostly controlled by the state government, creating many constraints to the growth and development of the private digital tourism business products, which in the results is represented by limited amount of market share of private companies. This project will identify the issues in the current digital tourism market development opportunities, as well as provide solutions to the challenges addressed by the existing situation and motives of the government to centralize the monitoring and controlling functions over the digitalization of tourism sector in Kazakhstan.

II.   Project objective

1.   To determine current problems in the existing digital tourism development in Kazakhstan

2.   To analyze the effects of transition over the digital tourism management from state to private

3.   To provide recommendations on effective and safe approaches to the transition.

III.   Scope, order and terms of work performance.

Stage 1. Conducting an analysis of the existing literature on the selected topic.

A study of tourism digitalization in the regions of Europe, the United States of America, Asia and MENA and the current situation in Kazakhstan.

Stage 2. Description of the research methodology, justification for the choice of method.

Qualitative research methodology will be used to collect the data. As a part of our project, the use of a qualitative research method was chosen, since it can be used to obtain a deeper understanding of the problem and people's perspectives.

Stage 3. Description of the means of data collection.

An interview will be carried out with at least 15 respondents from different organizations, such as tour agency employees, representatives from the governmental sector (Tourism Committee) and quasi-governmental sector (Technopark of IT startups Astana Hub, National company Kazakh Tourism.

Stage 4. Description of the results of the study:

An analysis of the interview results, summary and statistical evidence to support/not support the Senior project's goal.

Stage 5. Description of the conclusion, recommendations:

The research and analysis of the collected data will be represented in the form of the development policy recommendations aimed to be introduced to the decision-making units responsible for the tourism development in Kazakhstan. The final Paper will represent recommendations on further actions to be taken in order to foster the tourism digitalization in Kazakhstan to achieve the best outcome.

IV. Project quality indicators.

a) The use of relevant regulatory documents and literature at the time of writing the senior project;

b) Writing a graduation project in accordance with the Guidelines for writing a senior project;

c) Compliance by members of the Scrum Team with the requirements of the Academic Integrity Policy regarding anti-plagiarism is implied.

V. Composition of the group.

Scientific adviser: Senior lecturer, Head of Tourism and Hospitality programmes, Lukpanova Madina

Students: Urazakova Malika, Beissembayeva Dilnaz, Mukatayeva Madina

Representative of the customer (employer): n/a

VI. The responsibility matrix of group members.

Stages	Supervisor's full name	1st student's full name	2nd student's full name	3rd student's fullname	Client's represent ative's full name
Stage 1. Conducting an analysis of the existing literature on the selected topic.	Lukpanova Madina	Madina Mukatayeva	Dilnaz Beissembayeva	Malika Urazakova	n/a
Description of the research methodology, justification for the choice of method (quantitative, qualitative).	Lukpanova Madina	Dilnaz Beissembayeva	Madina Mukatayeva	Malika Urazakova	n/a
Stage 3. Description of the means of data collection (interviewing, document analysis, survey).	Lukpanova Madina	Dilnaz Beissembayeva	Malika Urazakova	Madina Mukatayeva	n/a

Stage 4. Description of the results of the study.	Lukpanova Madina	Malika Urazakova	Madina Mukatayeva	Dilnaz Beissembayeva	n/a
Stage 5. Description of the conclusion, recommendations.	Lukpanova Madina	Malika Urazakova	Dilnaz Beissembayeva	Madina Mukatayeva	n/a

VII. Project Completion Form.

Project Completion Form:

1) development policy recommendations

We, the undersigned, agree to use these terms of reference as an agreement on the creation and use of a work of science, concluded between the members of the Scrum team and KAZGUU University, according to which the members of the Scrum team undertake to transfer to KAZGUU University the exclusive property right to the created work of science, as well as the exclusive right to use the work at its own discretion in any form and under any name in any country in the world, including the right to reproduce the work; distribution of the original or copies of the work through sale or other transfer of ownership; import of copies of the work; public display of the original or copy of the work; other communication of the work to the public; translation of the work into another language; processing and / or other alteration of the work and any other types of use not prohibited by the legislation of the Republic of Kazakhstan.

Supervisor:
Senior lecturer, Head of Tourism and Hospitality programmes,
Madina Lukpanova

Students:
Malika Urazakova

DilnazBeissembayeva

Madina Mukatayeva

Project summary

This research focuses on the tourism digitalization development in Kazakhstan. Currently, the key control over the development of digital tourism relies on the government, with limited support towards private entrepreneurs. This study analyzes current problems in the existing digital tourism development in Kazakhstan and highlights prospects and opportunities of the Kazakhstan market with regards to the transition of state management towards private. The study summarizes the effectiveness of a mixed-control strategy, where the government supports the initiatives of the private sector while focusing on the internal issues of the state such as underdeveloped infrastructure, corruption and the country's stability.

Table of contents

List of tables and figures

Introduction

Tourism is one of the largest growing industries in the world, generating 10.3% of the global GDP (Simpson, 2022) and constantly progressing. Kazakhstan, the ninth largest country in the world and the largest landlocked country, is among the list of developing countries aiming at becoming a popular tourist destination. As emphasized by Ramazanova et al. (2019), despite the rich and diverse natural, cultural and historical inheritance, Kazakhstan is still an unexplored tourism destination due to several challenges such as lack of marketing and limited exposure, insufficient professional skills and education in the specific sector, undeveloped infrastructure, technology and other aspects. Furthermore, political fluctuations in Kazakhstan have affected its position on the global international market, hindering its development as a tourism destination. Following the anti-government movements in Kazakhstan in 2022, the security of the country and the nation had been damaged with the responsive acts of violence from the side of the government: "authorities used lethal force in responding to protests and violence in January" (Human Rights Watch, 2023), which was not only targeting the protestants, yet the media workers, environmental defendants and civil society too. Considering the state's reputation and position on the international market, it is essential to implement diverse strategies to attract more tourists.

In terms of tourism development, Kazakhstan has a number of opportunities and possibilities to become one of the world's most popular tourist sites in different directions: ethno and cultural tourism, ecotourism, wildlife tourism and other. However, its development has stagnated for different reasons, including lack of freedom, violation of labor rights and control of the government over this sector. Tourism in Kazakhstan could be a major economic contributor

and could help the country flourish, increase the standards of living and the overall image of the state.

The purpose of this study is to identify the existing issues and opportunities in the digital tourism development in relation to the state control and to explore the possible effects of a transition from governmental to private management of digital tourism development. This research will evaluate the scope for development and opportunities if the private sector will control the digital tourism management, which may help to position Kazakhstan as an attractive tourism destination on the international market and benefit the economy.

Objectives:

1.   To determine current problems in the existing digital tourism development in Kazakhstan

2.   To analyze the effects of transition over the digital tourism management from state to private

3.   To provide recommendations on effective and safe approaches to the transition.

Literature Review

Middle East

Throughout many decades, the Middle East has been seen as closed countries with limited tourism development due to strict legislations and religious factors. However, in the past years, tourism levels in the Middle East has demonstrated a rapid elevation and now is considered to be one of the most developed tourism drivers in the world. The increase in tourism in countries such as the United Arab Emirates, Qatar, Saudi Arabia etc., has contributed to the flourishing economy and increased the GDP in the regions. Such development has triggered a large number of startups and companies related to the tourism industry, which are continuously profiting the countries in the Middle East and enhance tourists' perception of this region. As described by Villar (2021), the expansion of the tourism industry in Saudi Arabia has offered 1.5 million jobs in 2019, reducing the unemployment rate in the country. Moreover, "Saudi Arabia seeks to attract 100 million visitors by 2030 and pose itself as a remarkable competitor to other destinations" (Villar, 2021). This demonstrates the tourism development plans in Saudi Arabia, forecasting a further increase in tourism flow and advancement as a destination.

Nevertheless, digitalization of the tourism sector in the Middle East is still restrained by the government to an extent. After Covid-19, the government in United Arab Emirates, Saudi Arabia and Kuwait have implemented new regulations regarding tourism digitalization, with the means to ensure the countries' protection: restructuring the system of public authorities addressing the digital transformation, introducing a Digital Government Authority, to manage the digital development on an administrative level and introducing a compilation of the new regulations to ease the public's comprehension and awareness. As highlighted by Mourtada et al.

(2022), the government's supervision over the digitalization efforts accosts a number of challenges and confines such as "management hesitation, legacy technology architecture, a lack of digital talent, failure to adopt an agile mindset, and ineffective monitoring of progress" (Mourtada et al., 2022). These limitations to the digitalization efforts of the tourism industry are reflected in Kazakhstan's endeavors too, and emphasize the dangers of government's domination over the subject.

Asia

Similarly to the Middle East, tourism in Asia has also demonstrated significant developments over the past years. However, within the Asian region, digitalization of tourism and the tourism progression in general has a severely fluctuating trend. Countries such as Singapore, Korea and China are the leaders in the tourism sector and are seen as role model destinations for many regions, including Kazakhstan, while the countries in Central Asia, including Uzbekistan, Tajikistan, Mongolia and Kyrgyzstan are less advanced and are below Kazakhstan in the Digital Transformation ranking (Ure, 2021). Ure (2021) evaluates the efficiency of Digital Solutions Centre (DSC) to elevate and expand digital transformation in Asian countries by separating the digital technology strategies into three subsections: infrastructure, information and service application.

Singapore is one of the most developed tourism destinations around the world with a supreme technological advancement. As depicted by Leaño (2021), the tourism digitalization initiative in Singapore is guided by the Singapore Tourism Board: an agency aiming at expanding the economy through the tourism industry. Their digitalization strategy includes adopting diverse technologies such as "Visit Singapore Account", a digital tourist identifier, an

automation technology "Visit Singapore Pass", IoT monitoring, AR and VR experiences, "SG Clean" sanitation technologies and other initiatives, which all were developed through the Tourism Information and Services Hub - a digital platform with contributions and propositions from any business (STB, 2021). This is an example of a successful public's contribution to the development and digitalization of the tourism industry.

Europe

The tourism industry in Europe occupies a very important place, as it is one of the most important economic activities. The European Union occupies an advanced and leading position in terms of the number of tourists from all over the world, which, as a result, is a rapidly growing tourism Neistadt (2018). Digitalization has had a huge impact on the tourism industry in the European Union: if earlier tourists used travel agencies to plan and book their trip, now people prefer to do everything themselves through online booking systems, as it has become it is much more convenient to do without leaving home, to look for the most profitable vacation options, in addition, digital technologies have provided tourists with the opportunity to share their personal experiences through personal messages, travel blogs in Europe, which allows people to make their vacation as comfortable as possible.

Furthermore, as highlighted by Neistadt (2018), Europe is actively developing digital marketing in the field of tourism, the use of advanced digital technologies has also begun in the field of small and medium-sized businesses, digitalization is considered one of the most important tools over the past few years, which is the key to the future growth of the European Union, specifically in countries such as Germany, Spain, France and Italy, in addition to attracting even more international tourists (Hans, 2017).

France occupies a leading position in visiting international tourists from all over the world, it is in this country that the digital marketing of the tourism sector is fully developed, according to an article by Amlan (2021), at the moment France is undergoing a complete digitalization of the tourism sector: tourist accommodations, room reservations, restaurants, car rental for tourists and everything related to the provision of services. It should be noted that there is a full development of digitalization in all sectors of the tourism industry in France. COVID-19 dealt a huge blow to the tourism and hospitality industry around the world, due to the crisis, many travel agencies simply closed, some travel companies switched to an online format of work, working and making out tours for tourists remotely. According to VisitBritain by the year of 2025 the total share of GDP will be 10%, the impact of tourism in England plays a hugeт role in the economy, and the total tourism industry will be about 257 billion pounds.

The tourism market in the UK is very developed, with different types of travel agencies: online and offline (Promodo, 2022), the main leader among the "traditional" type of travel agencies in the UK is Hays Travel. Hays Travel is one of the most independent travel agencies in England. The founder is a private individual - John Hayes, this travel agency is successful as the total turnover for the period of 2019 amounted to more than 1 billion £ (Angliya, 2019). Startup online platform Booking - Application for online hotel booking and car rental was founded in Europe, Netherlands, yet in the early 2000s it was bought out by The Priceline Group in America, but everything is also focused on the European market. Until 2019, the startup was absolutely successful, with a total net profit of $4.865 billion, but after the COVID-19 pandemic, the company's turnover for 2020 was less than $59 million (Shemyakin, 2021). The startup has 198 Booking Offices present in more than 70 countries, including more than 28 million accommodation options for tourists and locals (Promodo, 2022).

Menu del Día app (Spain) - the app allows you to easily and easily find gastronomic promotions in a restaurant and local cafes, in addition, it includes daily route and transport options, has sufficient demand in Southern Europe, this startup is located in more than 800 establishments and is successful. "UNWTO Top 100 tourism startups and innovators". The Travello platform (Australia) is a successful startup belonging to the appearance of Mark Cantoni and Ryan Hanley, who in their environment found on the development of this application, at the moment the possibility of making a profit of 10-15% per month (Stephanie, 2018). In demand in more than 180 countries.

Kazakhstan

An article by Mussina & Mamrayeva (2020) describes the benefits of introducing digitalization into the tourism sector in Kazakhstan, in addition, the current state of the tourism industry in the country is assessed, and the results of the analysis of ICT readiness in the tourism industry in Kazakhstan are shown. According to statistics of World Travel Tourism Council (2021), the share of tourism in GDP is 5.2%, the tourism industry has been increasingly affecting the country's economy in recent years. The majority of tourists come from countries: Russia, Uzbekistan, Kyrgyzstan, Turkey, South Korea, China and so on.

Digitalization of marketing in the travel industry tends to provide guests with the best possible experience, and online platform owners have received high booking revenues. In 2017 Kazakhstan began to develop a system for digitalization of the tourism sector, this program is aimed at ensuring that every resident of the country has an improved quality of life due to the digitalization in Kazakhstan (Mussina & Mamrayeva, 2020). According to a Booking.com survey, approximately 30% of tourists arrange their trips through online platforms, that is, artificial intelligence, 50% of all respondents say that it does not matter to them who will plan

their tour, application or a live person, the main thing is that all their preferences are satisfied (Booking.com, 2019). Kazakhstani startups, which are very much in demand and are successful startups, are in the field of tourism and hospitality. Furthermore, explained by Ibrayeva (2022) Jet is a system that allows people to book an electric scooter using an online application, using this application is very convenient, as it does not cause any inconvenience, you can leave the jet in any of the parking spaces. The founders are entrepreneurs Meirambek Abelkasov and Serik Uspanov. For 2021, more than $ 3 million of investments were attracted, this startup was supported by private investors from Russia and Kazakhstan (Atayan, 2021). The application is very popular among the local population, as well as among tourists, as it is affordable in terms of price and quality. The citypass startup allows tourists to use an online map and qr code, which gives a free opportunity to visit all local attractions, museums that are included in this card. The application is in sufficient demand among visiting tourists (Astana City Pass, 2021). The "Eqonaq" system is an application for collecting and processing data on persons arriving from other countries, this system also keeps records of the number of tourists arriving, the system is maintained with the support of government agencies. It was created within the framework of the state program with the support of the Ministry of Culture and Sports of the Republic of Kazakhstan.

Aviata is a Kazakhstani IT company for booking and purchasing air tickets, organizing travel. It is a private company, the founders are Alexey Li and Evgeny Matveev, in 2018 the startup was completely bought out by the Chocofamily holding (Kapital.Kz, 2019).

According to Aviata.kz statistics (2019), the company's total turnover amounted to $111.3 million, which indicates that the company occupies a leading position in the field of tourism and has a huge demand not only in Kazakhstan, but also in other CIS countries (Astana City Pass,

2019). Chocolife.me is a leader in e-commerce, promoting and providing services with a high percentage. The founder is a private individual Ramil Mukhoryapov, developed with the help of six investors, explained by Sadyr (2020). Tourists also have the opportunity to visit attractions, local restaurants, museums in the city at a favorable and affordable price.

The United States

The US is recognized as one of the most progressive countries in the digital arena, due to major contributions which are influencing the global economy. According to the EIB (European Investment Bank), the progress in digital adoption during pandemic is slightly faster in the US compared to the EU in terms of manufacturing (greater for 12%), construction sectors(21%), services(13%) and infrastructure(11%) (Ambrosio et al., 2020).

When it comes to the tourism industry, as for any other developed country the contributions by tourism and hospitality sectors remain substantially small, comprising 2.7% of total GDP in 2016 (OECD, 2018 cited in Aratuo & Etienne.). According to Zheng & Zhang (2013), the economic performance of international and domestic tourism demand in the U.S. can be perceived as generally income-inelastic. The hindrance of general economic activity of the tourism sector can be explained by the requirement of a large upfront investment for the majority of tourism-related enterprises due to the difficulty to regulate supply in the short-run. Nevertheless, the scope of such a market allows the industry's profit maximization. Taking into account that domestic and international travelers compose $1.1 trillion of total spending in the US in 2019, which directly sustained 9 million jobs, while generating $277 billion in payroll income and tax revenues comprising $180 billion (US Travel Association, 2019).

By taking a closer look into successful startups such as Airbnb and Tripadvisor, it would be feasible to infer the development of digitalization in the tourism industry. In his book Zero to

One, the founder of PayPal Peter Thiel and Blake Masters mentioned the success story behind Airbnb. It has been described "Before Airbnb, travelers had little choice but to pay high prices for a hotel room, and property owners couldn't easily and reliably rent out their unoccupied space. Airbnb saw untapped supply and unaddressed demand where others saw nothing at all." In the case of Airbnb, which is recognised as one of the most successful digital marketplace, which had significantly transformed the accommodation landscape by the provision of short-term rentals, not only could they process over two million room rentals, but also were valued at about $2.5 billion in 2012 (Edelman & Luca, 2014). Guttentag et al. (2018) suggested that practical advantages are more prioritized by customers than the experiential appeals. This feature could be attributed to the exceptionally developed digital and operating systems.

TripAdvisor app, which is viewed as one of the most well-known social media marketplaces in the travel industry, along with 463 million average visitors per month as of 2019, was eligible to be recognised as one of the leading top 10 travel apps in 26 countries in 2021 (Wasiolek, 2021). Based on "TripAdvisor Inc. (2019) Form 10-K Annual Report", it sustains about 859 million reviews for presumably 8.6 million facilities. These results could indicate the scope of their success. According to Baer, & Wilm (2014), of Liberty Tripadvisor Holdings, who own the company, Tripadvisor receives its revenue largely due to its click-based advertising and display-based advertising. Tripadvisor's fundraising reached $303.3M, their latest funding was raised from a Post-IPO Equity round in 2021.

In regards to the liquidity and capital resources of Liberty Tripadvisor Holdings, substantially all of the enterprise's funds "are invested in the U.S. Treasury securities, other government securities or government guaranteed funds, AAA rated money market funds and other highly rated financial and corporate debt instruments in 2014"(Baer, & Wilm , 2014).

There are conceivable sources of liquidity such as "available cash balances, proceeds from asset sales, monetization of investments, outstanding or anticipated debt facilities, debt and equity issuances, and dividend and interest receipts". As TripAdvisor possesses about $319 million, out of which about $231 million of the TripAdvisor capital "is held by foreign subsidiaries of TripAdvisor which is generally accessible but certain tax consequences may reduce the net amount of cash TripAdvisor is able to utilize for domestic purposes". This could infer that Tripiadvisor is influenced by minor governmental interference.

Methodology

This research investigates the digital tourism development level in Kazakhstan and the effects and opportunities of a transition of digital tourism management from state to private. In order to gather the information from different perspectives, the research has been divided into three categories: the government, private sector, and startups. In order to be able to collect data from all three groups, a qualitative methodology approach has been selected and interviews were carried out. As highlighted by Venny et al. (2021), the qualitative approach allows the researcher to "capture in-depth information" (Venny et al., 2021), and therefore help to apprehend the relevant perspectives. Later on, three lists have been created for the three categories, with contact information of prospective interviewees. Each list contained over 25 contacts in order to achieve a sufficient number of interviews, considering that only less than a half contacted individuals replied to the interview request. The researchers have sent out emails with an invitation to conduct an interview with research purposes and have explained the reason and the topic of the research. The interviews were conducted in three ways in accordance to the interviewee's preference: a zoom call, a face-to-face meeting or a chat question and answer session. Offering different measures for an interview helped to receive more responses, as many respondents were unavailable for a meeting. With the invitation to the interview, the researchers have also explained the confidentiality guarantee and the interviewees' right to remain anonymous, as well as the fact that the information gathered from the interview will only be used for this research as a part of the senior project. In order to analyze the information collected in the interviews, all conversations have been recorded to ensure the accuracy of interpretation and evaluation.

For the three groups, the key criteria for the sampling was to be directly related to the tourism sector. The governmental representatives included all organizations managed by the state

such as Kazakh Tourism, the Committee of Tourism Industry of the Ministry of Culture and Sport, Astana Hub etc. The private business category addressed tour operators, informational companies such as Sxodim and other independent organizations. The startups were selected by the field of focus with a stress on the digital tourism field.

Findings

Governmental perspective

In this section, the results of the interviews conducted with the representatives of governmental organizations will be envisioned. The representatives of the organization who receive investments from the government under the city development program include "Astana Invest". We have contacted the department which dealt with the development of urban tourism and MICE events. The department carried out and implemented certain projects that relate specifically to the development of tourism, including participation in bidding programs for hosting international events, cross-marketing promotions, use of the latest targeted advertising marketing, preparation of specific content for placement abroad and for placement on marketing tools, and carrying out promotional tours for organizations that were interested in organizing mice events in Astana. According to the manager responsible for MICE tourism, in regards to the Butler's theory Astana is maintaining the development stage after having held numerous events including international exhibitions such as EXPO-2017, while MICE tourism is now at the stage of involvement, referring to its role as niche tourism. The respondent believes that domestic tourism can be considered as highly developed, due to the occupancy of the local aircrafts, the development of business tourism, and the abundance of programs such as "Kids Go Free" being implemented by the public sector namely Kazakh Tourism to stimulate domestic tourism. As someone who has worked in tourism for four years the respondent has never seen startups developing in MICE tourism. However, recently they were ready to implement a platform proposed by the students of Astana IT University, who were developing a start-up in this field by creating an application and integrating it into their own working calendar. The app is aimed to sync multiple apps into one and will also be adapted, for example, it includes personalized

routes, places that a tourist should visit or some events that take place in the city. The department also provided them with more information about the city in order to receive a quality product that they could use to develop urban tourism. The program for development of MICE tourism is included in both the State Tourism Development Program and the conceptual framework of tourism development, but as promising areas. The department is at the level of the local executive body, and has a program to support various events that can take the form of financial, administrative and promotional support through existing marketing tools such as websites visit Astana and astana cb, targeted advertising , thus executing as mediators. Nevertheless, the main condition to take part in such a program is that this event should expect international guests due to the approved regulatory documents for these programs and according to which they should only support international events that are stimulated by the tourist flow, namely the inbound tourist flow to Astana. There was an application called Smart Astana where there was a whole section called visit.Astana, a mobile version of tourist portal visit, which due to poor promotion could't work because tourists weren't aware of the existence of this application. The department uses digitalization precisely to promote the brand of the city, that is, digital tools within the framework of their marketing. In general, the respondent suggests that the prospects for the development of digitalization in the field of tourism are favorable due to the opportunities to integrate with Astana hub and Astana IT University. Nowadays, they collaborate with izi.TRAVEL which provide online audio guide services, and this app also enables each attraction to be scanned with qr-code. Thus, the marketing channels are intended to promote urban tourism via qr-codes that automatically transfers tourists to the visit astana platform, including promoting internationally by placing qr-codes in transport hubs such as London Heathrow Airport, and

cities as Amsterdam, Frankfurt, Istanbul and Dubai, which enables a foreigner get familiar with the city.

According to the representative of "Kazakh Tourism " Tourism in Kazakhstan is in its beginning phase, due to the notion that not all necessary services are fully functional throughout the tourist value chain. Meanwhile, domestic tourism is underdeveloped, and its point is not only in the service or infrastructure, as well as the high cost of air travel, but also in the low incomes of the population. The respondent suggests that the state of domestic tourism in the country is a reflection of the socio-economic level of the population and, according to certain studies, more than half of the income of the country's population goes to subsistence, which contributes to the inability of local residents to travel. When it comes to startups, in his opinion, they should be financially attractive to investors, so that the state could create conditions for start-ups to learn how to create such a product, but it cannot directly finance it. Kazakh tourism has plans to support its ecosystem of digital products (E konak, tourstat.kz, kazakhstan.travel, tourismonline.kz). For the development of digitalization in the private sector, it is necessary to bring together service owners (hotels, restaurants, attractions, transport companies, tour operators) and start-ups more often, hence, in the process of negotiations, they could understand each other's needs more.

Next, a representative in charge of digital projects in Kazakh Tourism elaborated on projects such as Kazakhstan Travel, Eqonaq, tourstat.kz, shagym.kz, tourismonline.kz. The national tourism platform called Kazakhstan Travel which is also available in 8 languages aimed at promoting destinations of Kazakhstan for anyone who is interested in traveling in order to increase the tourism potential. As a benchmark the project was taking the world's best practices from countries such as Australia, Canada, Singapore. The portal has been operating since 2018

and the number of visitors of the site as of 2022 was 470 000 and generated about 2000 people a day. Next project, Eqonaq, is designed to simplify the procedures for registering foreigners and improve the quality of presentation of tourist services which since last 3 years reached about 900,000 people getting registered. It provides notification of registration, that is, this system combines the services of the Ministry of the Interior Affairs and the committee of national security where the given registration from hotels, for instance, automatically goes to the migration police. Nowadays, about 90 thousand places of accommodation have been registered. Moreover, an online platform has been developed for representatives of the tourism market for domestic tourism online called tourismline.kz. This platform allows users to receive useful information about tourism and trends sharing experience via webinar, chat bot, forums. As of 2022, there were approximately 62 000 users of the platform. The data in the platform is presented with an interactive map with the ability to select the necessary information by region displaying objects and for example, toilets and information regarding the general condition of the toilets. Within the framework of tourism.online.kz, an online academy of domestic tourism was launched to support businesses by learning the basics of tour business and thus develop practical skills crucial to the tourism industry to develop an existing business. Up until now from the date it was launched, 4300 people were trained. In order to obtain more accurate statistical data in the field of tourism, they have developed the tourstat.kz information system, which allows data visualization in a user-friendly way with graphs, bar charts, pie charts etc. This system is integrated with stat gov kz and eqonaq. In order to provide analytical data of high quality, previous year there were integrations with WTTC, UNWTO, world bank, our world in data, which ensures the formation of dynamic data of domestic tourism as well as international. Next, Shagym.kz is a digital module designed to assess the quality of the work of tourism

objects, tour guides, roadside services, which enables a tourist who had encountered a negative experience to leave a review or complaint. This module is available in hotels with access via qr-codes. The joint-stock national company aims to promote Kazakhstan abroad, which operates effectively by implementing digital projects, where each fulfills its role. For example, Kazakhstan travel is a guiding service, eqonaq registers guests eligibility to stay, tourism online is for tour operators to improve their services, Shagym is to receive feedback from tourists. According to the statistics of hotel and restaurant association, Kazakhstan occupies about 3500 hotels, and 2000 of which are registered in eqonaq and about 90 000 are the ones who rent apartments. The foreigners are obliged to register in the system, the host party is responsible for his registration. The respondent highlighted that the main stakeholders are the state, business sector and tourists where the state requires regulation of the tourism sector by proposing policy and businesses test these policies on effectiveness and tourists are the key drivers of the value chain.

In order to implement digital projects it's important to ensure that the high speed internet connection is functioning in the destinations. The association of legal entities "Kazakhstan Association of Agro and Rural Tourism" (hereinafter referred to as the Association) is a non-governmental organization that implements projects in the field of development of agro-tourism in Kazakhstan since 2019. The Association has taken part and / or initiated the implementation of more than 10 projects to develop agro-tourism potential in rural areas of the Republic of Kazakhstan. Rural tourism training in these projects included the provision of introductory courses on agritourism for rural residents, as well as the distribution of educational handouts, including the author's Guide for rural residents on organizing agritourism and useful web links to

online courses. As part of these trips, a total of 68 training seminars were held, in which a total of 595 listeners took part.

In addition to researching the potential of the agritourism market in the villages of Kazakhstan, the Association also tries to help the rural residents of the districts to develop this potential through conducting introductory courses, identifying initiative groups and their coordinators in each district and village that wants to meet tourists. Their experts continue to keep in touch with the appointed coordinators, provide consultations, share online materials for familiarization and development of entrepreneurial skills, introduce to city tour operators who want to organize a tour route with visits to rural locations or send tourists to them on vacation.

However, unfortunately, not all settlements currently have coverage of mobile operators, not to mention the Internet. For example, the village of Poperechnoye in the East Kazakhstan region, recognized as one of the destinations with the most developed agro-tourism in Kazakhstan. In this village, more than 6 guest houses provide their services, differing both in positioning and in the services provided. However, it does not catch the connection of any mobile operator. In addition to the fact that this fact makes it difficult to keep in touch with the owners of farms, to help them develop, it also hinders the promotion of their agro-tourist services. Firstly, it is difficult for potential guests to contact and book a vacation in guest houses in such villages, to find out about the services, and secondly, the prospect of being cut off from communication with the outside world more often scares than attracts tourists.

The development projects implemented by the Association aim not only to tell the villagers about the possibilities of additional income on agro-tourism, but also to collect and convey information about the potential of villages and problematic issues hindering the effective development of agro-tourism in these villages. These projects are usually initiated jointly with

JSC NC Kazakh Tourism, which develops the tourism industry in Kazakhstan, or international organizations such as UNDP Kazakhstan, one of whose goals is to reduce rural poverty.

In addition to information, the Association also develops proposals for solving these problematic issues and sends them to the authorities responsible for the development of the tourism industry in Kazakhstan. State bodies and quasi state bodies (MKS RK, Kazakh Tourism, Atameken, local local authorities) interact through common projects, events for the development of agro-tourism, holding training seminars for rural residents and representatives of government agencies. Rural residents engaged in agritourism. Assistance in opening an agritourism business and its development. Tour operators and travel agencies. Promotion of agritourism services to tour operators. Distribution of catalogs of operating objects with their services. Promotion of facilities services through advertising and the Association's website. Also, at the moment, an interactive map is being developed on the site, which includes not only all agritourism facilities with their services, but also makes it possible to build the optimal route. It is expected that this map will help attract more tourists to the agritourism of Kazakhstan due to the maximum availability of information.

Table 1.

The interpretation formed by the governmental representatives on the subject of tourism development and its implications in digitalization

	Astana Invest	Kazakh Tourism
State of tourism development	Regarded as highly developed/MICE tourism is now at the stage of involvement	Beginning phase, due to the fact that not all necessary services are fully functional throughout the tourist value chain
Issues in regards to the hindrance in the development of domestic tourism	Regarded as highly developed, due to the occupancy of the local aircrafts, the development of business tourism, and the abundance of programs such as "Kids Go Free. No issues mentioned.	Considered as underdeveloped due to socio economic aspects such as the high costs of air travel and low incomes of the population

Criterias for IT startups to get support from government	Not mentioned	The state could create conditions for financially attractive start-ups to learn how to create such a product, but it cannot directly finance it.
Governmental programs to support entrepreneurs in travel industry	Astana Hub was mentioned as programme provider supported by the state	Not mentioned
Successful practices	The app which is aimed to sync multiple apps into one and will also be adapted, for example, it includes personalized routes, places that a tourist should visit or some events that take place in the city.	Aims to support its ecosystem of digital products (E konak, tourstat.kz, kazakhstan.travel, tourismonline.kz).
Perspectives for the further digital development in tourism industry	The prospects for the development of digitalization in the field of tourism are favorable due to the opportunities to integrate with Astana hub and Astana IT University	In order to develop digitalization in the private sector, it is necessary to bring together service owners (hotels, restaurants, attractions, transport companies, tour operators)

Table 2

Digital products developing under regulation of Kazakh Tourism

	Kazakhstan Travel	Eqonaq	Shagym.kz	Tourstat	tourismonline.kz
Objectives	Focuses at promoting destinations of Kazakhstan for travelers	To simplify the procedures for registering foreigners	A digital module designed to assess the quality of the work.	Represented as data visualization in a user-friendly way with graphs, bar charts, pie charts etc. This system is integrated with stat gov kz and eqonaq.	The platform allows users to receive useful information about tourism and trends sharing experience
Problem/Solution/Availability/Effectiveness	To increase the tourism potential	To improve the quality of presentation of tourist services	Shagym is to receive feedback from tourists.	In order to obtain more accurate statistical data in the field of	The data in the platform is presented with an interactive map with the ability

				tourism and provide analytical data of high quality.	to select the necessary information by region displaying objects.
Results	The number of visitors of the site as of 2022 was 470 000 and generated about 2000 people a day.	2000 out of 3500 are registered in eqonaq and about 90 000 are the ones who rent apartments. Since the last 3 years, about 900,000 people have registered.	This module is available in hotels with access via qr-codes	There were integrations with WTTC, UNWTO, world bank, our world in data.	As of 2022, there were approximately 62 000 users of the platform

Private sector and startup perspective

The interviews among travel agencies / tour operators / start-ups, managed to get the following results: When choosing a country for vacation, more tourists pay attention to: pricing policy, season (climate factor in the country), food, whether a visa is needed, as these are additional costs for tourists, type of holiday. Also, most often there are problems with passports, insufficient funds from tourists (value for money rest), in addition, there are travel bans. Most tourists still prefer to contact travel agencies to this day in order to purchase a ready-made tour with a complete package, as they launch special charter flights, and if you take it yourself, there will most likely be planes with transfers and hotels are more expensive if you book through booking, as the tour operators say. But due to the fact that last month they launched the sale of Tours to Kaspi.Kz, almost 80% of tour operators and travel agencies are afraid of a decrease in demand because of this.

Many travel agencies do not work for domestic tourism, but are aimed specifically at foreign holidays, which suggests that domestic tourism is not so well developed in the country. Also, recently a large number of people have begun to be interested in domestic recreation and are asked to pick up tours within Kazakhstan, but since most of all agencies are aimed specifically at outbound tourism, they are unable to provide tours in Kazakhstan, in connection with this, they began to focus on this and introduce tours in Kazakhstan. As the answers of the interviewed respondents show everyone unanimously believes that the development of domestic tourism in the country is certainly possible, but only with financial support from the state. The direct state should influence the development of domestic tourism, as tour operators say Kazakhstan has an appropriate ministry that monitors the environment, maintains reserves, territories, and people should preserve, multiply, present beautifully not only to our citizens but also to foreign ones, so that people have an interest in tours in Kazakhstan. According to Almost 90% of tourists from Kazakhstan choose Turkey, Egypt, the Emirates for their holidays, since it is in these directions that people can find any vacation they prefer. Moreover, these countries provide all the amenities for tourists, starting with a good climate and ending with All-Inclusive food, which attracts vacationers directly. Kazakhstan has great potential for the development of tourism in the country, but only with the support of the state.

When it comes to the start-ups, there are marketplaces such as treeple.kz and mtour.kz which are focused on becoming traveling services. As Treeple was launched in March, they have just started to carry out 3-4 pivots, focusing on promotion tours via partners. The only company which develops such service is one of the successful practices in the traveltech industry is the German company "Get your guide". Currently, the start-up is under an acceleration program organized by innovation cluster "NURIS" which navigates them throughout their journey. The

respondent has highlighted their cooperation with visit Aktobe which didn't end successfully due to the inability of the government to understand consumers' needs. The head of the start-up mentioned a case where one of the governmental projects as one which has established a platform where a marketplace for tour guiding is involved could have become a successful private enterprise. In addition, there were events organized by the state spending almost $100 000 which wasn't effective enough due to the minority of the international attendees whereas when similar events were organized by the business even with minimal expenses the company could attract more tourists even though the state's support could be considered as minimal. There were notions that the state needs to focus on tourist infrastructure, analysis marketing for example via visit centers and research. The government could help by providing more access and openness towards innovation in the tourism industry. Due to the active promotions and marketing strategy, the government is performing effective networking. As tourism is one of the biggest markets in the world with more than $700 billion, such a market is less likely to be controlled by the government. The respondent mentioned that the state could allocate scholarships and acceleration programs, which would be beneficial for businesses. Their platform enables tourists to register tours independently without the help of tour agencies and tour operators. In this platform the AI picks up tours and excursions, after the destination is selected. In the case of Mtour, they had started initially as an online B2B platform for medical tourists, however, they have expanded the specter of services since 2021. The platform has created MVP in which they propose suppliers such as sanatoriums, hotels, rest zones in order to automate their business processes to register clients and monitor reserves. This platform could be considered as the analogy of Booking.com, however the marketplace allows more functions which focus local features. The team has experienced technical and organizational obstacles

however, currently they are at the stage of attracting suppliers and to date we have attracted 20

tours, 15 sanatoriums, 5 recreation areas. Since they are officially members of the Kazakhstan

Tourism Association (KTA), and presented the project to the Vice Ministers and heads of

various states, and received their approval and are in the process of attracting venture capital.

Table 2.

Government's support of start-ups

|	Treeple.kz	Mtour.kz
Developed under acceleration programmes	NURIS	Astana Hub
Objectives	Selling tours (packages)	Integrated marketplace with all encompassing functions
Support from the state	Cooperation with the visit center in Aktobe which didn't end successfully due to the inability of the government to understand consumers' needs.	The government could help by providing more access and openness towards innovation in the tourism industry.
Involvement from the public sector	Inefficiently allocates its investments	Insufficient progress to establish effective tourism infrastructure

Discussion

After analyzing the answers of the respondents, it can be concluded that travel agencies and operators tend to believe that at the moment the development of the tourism sector using digital technology, and in general, domestic tourism is at an insufficient level in Kazakhstan, since initially all problems within the country need to be solved (from the root) price increase such as inflation, end LRT, but in general there is certainly potential in solving problems in sequence. In addition, according to travel agencies, the development of domestic tourism in the country could develop at an even higher level with sufficient financial support from the state, Kazakhstan has a huge potential for the development of the tourism sector in the country, and this, of course, can help the introduction of even more digital technologies, for example, the introduction of electronic systems at airports upon arrival (passport control) has begun, all this simplifies the task of visiting Kazakhstan from abroad as much as possible, it was also possible to issue SIM cards for foreign citizens at passport control, as this would make it easier for them to find transport / use online maps and so on.

When it comes to the government's involvement in developing digital projects in tourism, there are many misconceptions about their involvement and commitment which is often underestimated because the government has been developing programs independently having their goals achieved differently than those of the private sector. The digital projects that include the facilitation of statistical accuracy, quality management have been a vested interest of the governmental campaign since it affects the overall nation's image and its tourist potential. The inability of the government to support start-up projects and lead them has been noted by the private sector. However, projects that are intended to develop the quality of the services by establishing an integral chain which would put stakeholders into one holistic system. The state

has been providing financial, administrative and marketing support for the execution of MICE events. The government's role has been maintained to be able to control administrative affairs which creates new opportunities for strengthening networking and building trust with the private sector. The core values of the private sector differ from state's, which leads to corresponding interaction with their objectives being based on their execution and implementation methods. The private sector highlighted one of the main objectives of the state is to be in charge of the city infrastructure, which contributes to the independent development of the private entities. This is also confirmed through the telecommunication issues mentioned by the Association of legal entities "Kazakhstan Association of Agro and Rural Tourism", which could indicate that insufficient infrastructure can significantly impact the growth and sustainability of tourism in a region. It may be difficult for businesses to connect with potential customers or for tourists to access information and resources they need. Thus, this can also impact the development and implementation of technology-based solutions. Therefore, the underdeveloped infrastructure may be a significant barrier to tourism development in some areas. The businesses have been constrained in the executive and administrative responsibilities of the city planning programmes, which in correspondence do not restrain the operating processes. The potential issues include the reluctance of private enterprises to cooperate within their own networking institutions to create digital platforms, which would autimze their CRM system and effectively propose marketing strategies. Digital marketplaces and platforms have faced the reluctance of the private sector especially the tour agencies and operators to collaborate. One of the main issues is the reluctance of the private sector to cooperate within their own networking institutions to create digital platforms, which would automate their customer relationship management (CRM) system and propose effective marketing strategies. This reluctance may be due to a lack of trust or a lack of

understanding of the potential benefits of such platforms. Moreover, digital marketplaces and

platforms have faced resistance from tour agencies and operators who are hesitant to collaborate.

Figure 1. *The conceptual framework of digitalization in tourism industry in Kazakhstan*
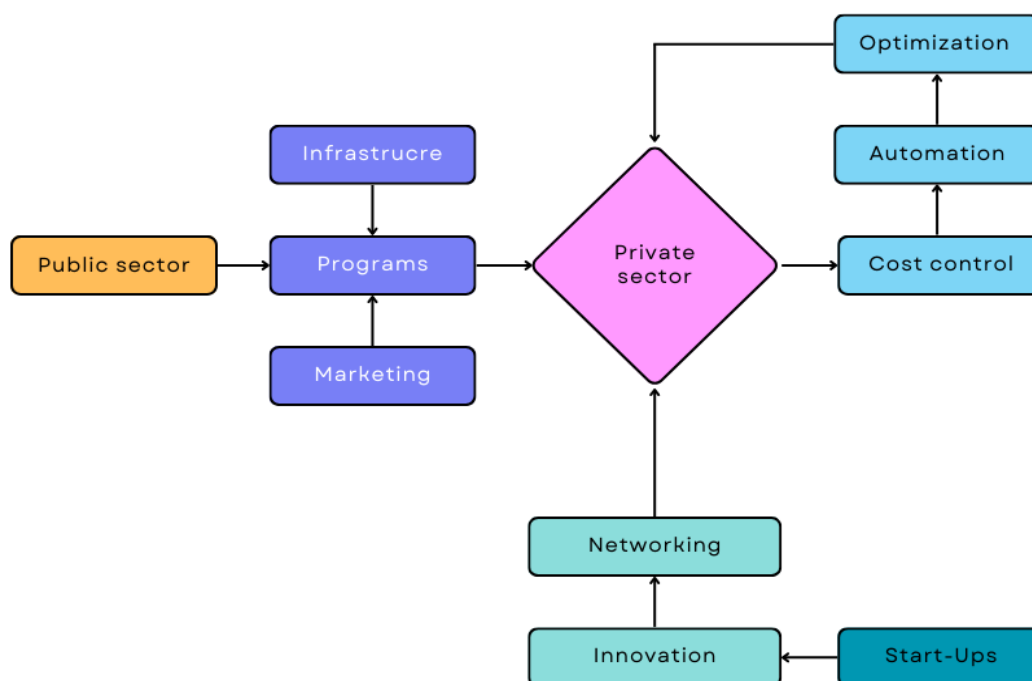
Conclusion

Kazakhstan is a developing country with extended opportunities to flourish as a tourism destination on the international market. In the age of technologies, digital tourism is the best tool to attract more tourists and position a state on the market. In order to expand digital tourism to a level it will contribute to the economy, the approach to the expansion has to be addressed. This research evaluates the existing issues in the current digital tourism development in Kazakhstan in relation to the governmental management of the segment, as well as discusses the outcomes of a transition from the state management to private management of the tourism digitalization.

The investigation of the issues and prospects of tourism digitalization in Kazakhstan has had different outcomes from the three categories. The private sector has stressed the importance of governmental financing tourism development and emphasized that the rate of development is directly reflected by the financial support. The key reasons for the stagnation in the development, as depicted by the private sector, are the internal state problems such as political issues, lack of support from the government and infrastructure. These obstacles hinder the state's image, consequently making it more difficult to attract tourists. Regarding the prospects and opportunities, Kazakhstan has enough possibilities in terms of tourist attraction sites, and there is scope for rapid digitalization development, however only if the internal issues will be addressed by the government. Furthermore, it has been mentioned that the best way to increase the digital tourism development is to start by adding more technological installations for people's convenience such as digital map stands on the streets, giving out SIM cards to tourists upon arrival and other actions that do not require colossal investments.

Similarly, startup representatives have noted the lack of governmental initiatives in the area of tourism digitalization, emphasizing the benefits of private management. Nevertheless, the

startup perspective on the topic has been divided: although some representatives believe that the development rate is directly related to the government and their aid, some others believe that it is not heavily reliant on the governmental initiatives and is equally in the hands of the private sector.

The transition from state management of the tourism digitalization from private will help to diversify the approach and henceforth extend the scope for tourist attraction. Governmental financing is essential to accelerate the development and increase the overall image of Kazakhstan. In order to guarantee a smooth and effective transition, as discussed above, it would be best to begin with smaller-scale projects and efficient collaboration of the government and private sector, where the government solves internal issues within the country and provides the private businesses with the necessary support, who in their turn implement diverse strategies and work on the image of the country using technological advancements.

References

Ambrosio, F., Rückert, D., & Weiss, C. (2020). Who is prepared for the new digital age.
Evidence from the EIB Investment Survey; European Investment Bank: Kirchberg,
Luxembourg. ://www.eib.org/en/publications-research/economics/surveys-data/eibis-
digitalisation-report.htm

Angliya. (2019). *"Travel company Hays Travel buys Thomas Cook business"*
https://angliya.com/publication/turisticheskaya-kompaniya-hays-travel-pokupaet-biznes-thomas-
cook/

Aratuo, D. N., & Etienne, X. L. (2019). Industry level analysis of tourism-economic growth in
the United States. *Tourism Management*, *70*, 333-340.

Astana City Pass. (2021). *"What is the Astana Pass"*. *https://astana.citypass.kz/ru/astana-
citypass-24-chasa/*

Atayan N. (2021). *" Attraction of 3 million dollars of investments".*
https://www.tadviser.ru/index.php/%D0%9A%D0%BE%D0%BC%D0%BF%D0%B0%D
0%BD%D0%B8%D1%8F:Jet

Baer, R. N., & Wilm, R. L. LIBERTY TRIPADVISOR HOLDINGS, INC.
https://www.libertytripadvisorholdings.com/investors/financial-information/sec-
filings/content/0001047469-14-006413/0001047469-14-006413.pdf

Edelman, B. G., & Luca, M. (2014). Digital discrimination: The case of Airbnb. com. *Harvard
Business School NOM Unit Working Paper*, (14-054).

Guttentag, D., Smith, S., Potwarka, L., & Havitz, M. (2018). Why tourists choose Airbnb: A
motivation-based segmentation study. *Journal of Travel Research*, *57*(3), 342-359.

Hans, G. (2017). *"An analysis of digital trends in tourism and customer digital mobile behavior for the Visit Arctic Europe project"*. http://www.lme.fi/media/vae-outcomes/rd-results/report-visit-arctic-europe-mission-3-summary-2.pdf

Human Rights Watch. (2023, January 20). *World Report 2022*. https://www.hrw.org/world-report/2023/country-chapters/kazakhstan

Ibrayeva A. (2022). *"Top 10 Kazakh startups by attracted investments in 2021"*. https://5qbe.kz/posts/top-10-kazakhstanskih-startapov-po-privlechennym-investicziyam-v-2021-godu

Kapital.Kz. (2019). *"Chocofamily became the sole owner of Aviata.kz"*. https://kapital.kz/amp/business/82802/tskhotsofamily-stal-yedinstvennym-vladel-tsem-aviata-kz.html

K.P. Mussina & D.G. Mamrayeva (2020). *«Digitalization in the tourism industry of Kazakhstan»*. *http://www.lme.fi/media/vae-outcomes/rd-results/report-visit-arctic-europe-mission-3-summary-2.pdf*

Leaño, M. (2021, August 24). *Singapore Tourism Board's digitalisation drive*. Frontier Enterprise. https://www.frontier-enterprise.com/singapore-tourism-boards-digitalisation-drive/

Mourtada, R., Felden, F., Bruehwiler, R., & Joykutty, T. (2022, October 20). *Digital Government Transformation in the Middle East*. BCG Global. https://www.bcg.com/publications/2022/government-digital-trasformation-in-the-middle-east

Neistadt, M. (2018). *"Digital Tourism in the European Union"*.

https://www.europarl.europa.eu/RegData/etudes/BRIE/2018/628236/EPRS_BRI(2018)62

8236_EN.pdf

Promodo. (2022). *"UK Tourism Market Research: Major Trends 2022"*.

https://www.promodo.com/blog/uk-tourism-market-research-major-trends-2023

Ramazanova, M. (2019). *Tourism development in Kazakhstan*. http://hdl.handle.net/11328/2902

Sadyr S. (2020). *"5 businessmen of Kazakhstan in the online sphere"*

https://esquire.kz/5-tsifrovh-biznesmenov-kazahstana/amp/

Shemyakin N. (2021). *"Booking's profit fell by 99% hotels"*.

 https://tourism.interfax.ru/ru/news/articles/76997/

Simpson, J. (2022, August). *Travel and Tourism Economic Impact of 2022*. World Travel &

Tourism Council.   https://wttc.org/Portals/0/Documents/Reports/2022/EIR2022-

Global%20Trends.pdf

Singapore Tourism Board. (2021, April). *Harnessing Technology to Emerge Stronger Post

COVID-19 | STB*. https://www.stb.gov.sg/content/stb/en/trade-events-and-

resources/harnessing-technology-to-emerge-stronger-post-covid-.html

"TripAdvisor Inc. 2019 Form 10-K Annual Report". U.S. Securities and Exchange Commission.

Thiel, P., & Masters, B. (2014). *Zero to one: Notes on startups, or how to build the future*.

Currency.

Ure, J. (2021, October). *Digital Solutions Centre in Central Asia*. INFORMATION AND

COMMUNICATIONS TECHNOLOGY AND DISASTER RISK REDUCTION

DIVISION. https://unece.org/sites/default/files/2021-

10/13E%20Final%20John%20Ure%20DSC%202021_10_18.pdf

US Travel Association (2019). Us travel and tourism overview 2019

    https://www.ustravel.org/system/files/media_root/document/Research_Fact-Sheet_US-

    Travel-and-Tourism-Overview.pdf

Venny, K., Alif, M., & Sudharni, S. (2021). The Advantages and Disadvantages of Quantitative

    and Qualitative Approach for Investigating Washback in English Language Testing.

    Edukatif, *3*(5), 2299–2310. https://doi.org/10.31004/edukatif.v3i5.530

Villar, D. F. (2021, April 7). *The expansion of travel and tourism in the Middle East*. WTM

    Global Hub. https://hub.wtm.com/blog/destinations/the-expansion-of-travel-and-tourism-

    in-the-middle-east/

Wasiolek, Dan (March 25, 2021). "Online Travel Agencies' Moats Supported by COVID-19,

    Key Markets". *Morningstar.com*. Retrieved 2021-03-26.

https://www.crunchbase.com/organization/tripadvisor/company_financials

Zheng, B., & Zhang, Y. (2013). Household expenditures for leisure tourism in the USA, 1996

    and 2006. *International Journal of Tourism Research*, *15*(2), 197-208.