

A.Zh. Saduov, B.O. Mukanov, M.K. Asanova, D.T. Nursultan

*Ye.A. Buketov Karaganda State University
(E-mail: mukanovbo@mail.ru)*

Analysis of hotel services development in Republic of Kazakhstan

The analysis of development of hotel services in the Republic of Kazakhstan is carried out. Features their development — tendencies, their shortcomings and prospects. Highlighted regional disparities in the volume of hotel services. Questions of occupancy of hotels and quality of hotel services are considered, the factors influencing their quality. Hotel services are shown also from the point of view of preparation to an exhibition of the EXPO-2017. The structure of visitors of the hotel entities of Kazakhstan on the purposes of trips is considered. The forecast of a dynamics of increase in number of hotels and served visitors is constituted, the conclusion is drawn on the prospects of competitive struggle in the hotel market of Kazakhstan. Questions of the international hotel brands in Kazakhstan and applications of a franchizing are considered. The class of hotels based on prospects of a construction in the republic is set. Analyzed the availability of the number of rooms in terms of preparedness of regions for making tourist flows during the exhibition EXPO-2017.

Key words: tourism, hotels, quality, analysis, factors, the exhibition EXPO-2017, hotel services, the travel purposes.

Hotel services play an important role in tourism development of every country. The world sector of hotel services is developing with brisk temp [1]. The significant part of tour cost is occurred for accommodation services. Tourists at least spend a third of tour time in hotels and inns. Because of it, competitive ability of touristic product of the country is depended to the quality and cost of accommodation services.

The considerable attention is paid for hotel services on the threshold of EXPO-2017 international exhibition in Astana city. By the tentative forecasts, during the exhibition 5 million tourists will visit our country. The main force will be intended to accommodation places.

Let us consider the condition of hotel services in Republic of Kazakhstan.

In Kazakhstan the cost of hotel services are very high. The cost of hotel accommodation in Kazakhstan is equal to costs of hotel accommodation in New York and Paris. Because of those high costs, the hotel occupancy is equal to 23 % on the average. That is why, the most strategic pathways for hotel business in Kazakhstan are the construction of comparatively cheap three-star hotels. There has been observed a vibrant seasonal inequality of hotel occupancy. In the summer hotel occupancy is very high, having the lack of rooms. In the winter the hotel occupancy is very low. Sometimes in some hotels the hotel occupancy is equal to only 2–3 % with the same high costs.

The low hotel occupancy in winter times is mainly depended to policy, carried out by the government in tourism sphere.

It is required to create immediate measures by government for the help of winter tourism. Otherwise, the main measures, carried out by the government with the aim of attracting tourists in winter times, will be ineffective.

By this way, the hotel occupancy is strongly depended to tourism development, mostly to business tourism. The conference and business tourism is prevalent among the entry tourism in Kazakhstan. For the business and educational tourism the four-star and five-star hotels are more suitable, because those hotels offer accommodation services of high quality.

For the development of hotel sector we should know the conjuncture and tendencies of this development, in other words the marketing research is needed [2].

Let us consider the tendencies of hotel services development in Republic of Kazakhstan. The development of hotel industry is characterized by intensive progress.

If on 1st January 2004 there worked 279 hotels, then on 1st 2014 number of hotels increased to 1678. The six times increase in number of hotels and four times increase in number of served visitors from 2003 to 2014 is depended to growing rate of tourism development, increase of investments in tourism sphere, renewal and reconstruction of material and technical facilities (Fig. 1).

27 hotels among those 1678 hotels belong to the government, another 32 hotels belong to other countries, 1619 hotels are in private ownership, and 41 hotels of it are joint venture with foreign participation.

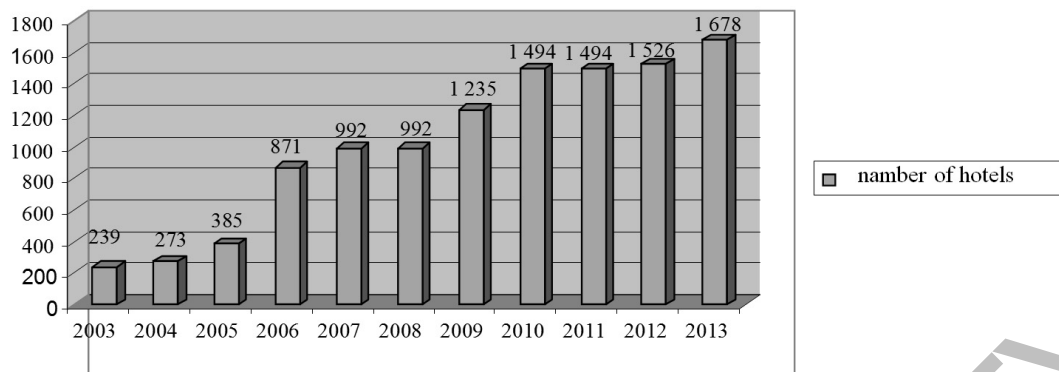


Figure 1. Dynamic pattern of hotel facility number in Republic of Kazakhstan from 2003 to 2013 [3]

Among the travel purposes the most request to hotel services belong to tourists with conference and business purpose, having 79,3 %, 15 % belongs to visiting the relatives, 5,7 % to other purposes (Fig. 2).

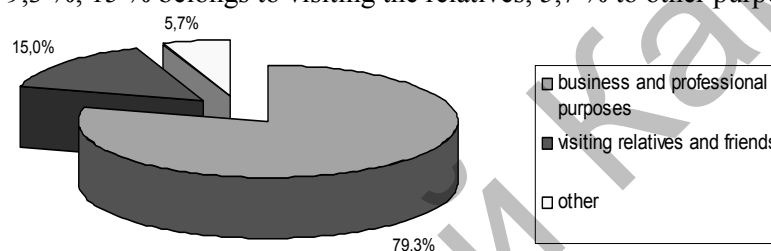


Figure 2. Structure of visitors of hotel facilities in Kazakhstan by the travel purposes in 2013

In hotel services market there is price imbalance, which slows down the development of hotel sector and domestic tourism. Exactly this factor affects to hotel occupancy.

As you can see in the Table 1, national average coefficient of hotel occupancy in 2013 is equal to 21,4 %, which is 1,4 % more than in 2009.

The increase in number of renting apartment with acceptable price led to insignificant growth of coefficient of hotel occupancy. Visitors actively use this kind of service (those services aren't considered in statistic data).

Atyrau (52,8 %), Kyzylorda (35,1 %), Astana city (33,9 %) are the leaders in regional division of hotel occupancy in 2013. The considerable coefficient of hotel occupancy of Atyrau is related to investment attraction and development of touristic cluster.

Table 1

Dynamics of hotel facility occupancy by the regions of Republic of Kazakhstan in 2009–2013 (in %)

Region	Years				
	2009	2010	2011	2012	2013
1	2	3	4	5	6
Republic of Kazakhstan	20,1	20,3	24,0	24,9	21,4
Akmola	24,6	14,5	23,3	21,7	21,8
Aktobe	38,9	22,3	27,3	17,3	20,3
Almaty	22,4	11,9	8,4	13,4	13,6
Atyrau	80,5	47,1	47,8	41,3	52,8
East Kazakhstan	105,2	19,4	29,1	18,0	23,3
Zhambyl	27,2	24,6	22,9	36,6	28,6
West Kazakhstan	41,8	15,1	16,8	16,5	12,2
Karaganda	123,2	23,2	34,3	29,0	23,8
Kostanai	20,0	17,9	19,4	18,4	21,9
Kyzylorda	158,9	61,6	88,4	50,3	35,1
Mangystau	18,6	15,1	16,8	13,6	17,2

1	2	3	4	5	6
Pavlodar	24,5	13,1	21,3	20,1	14,5
North Kazakhstan	32,6	11,8	11,6	17,7	14,6
South Kazakhstan	18,2	13,5	15,7	15,4	14,6
Astana city	26,3	28,4	31,1	34,5	33,9
Almaty city	32,4	23,9	26,8	42,4	27,4

Note. This table was composed by [3].

In 2013 the range of services, carried out by hotel facility, was equal to 66540899,7 thousand tenge, which is 1,32 times more than in 2008 (50 559 382,5 thousand tenge).

In the Figure 3 shows number of served visitors in accommodation places. In Table 2 shows correlation between growth temp of number of served visitors in accommodation places and the number of hotels.

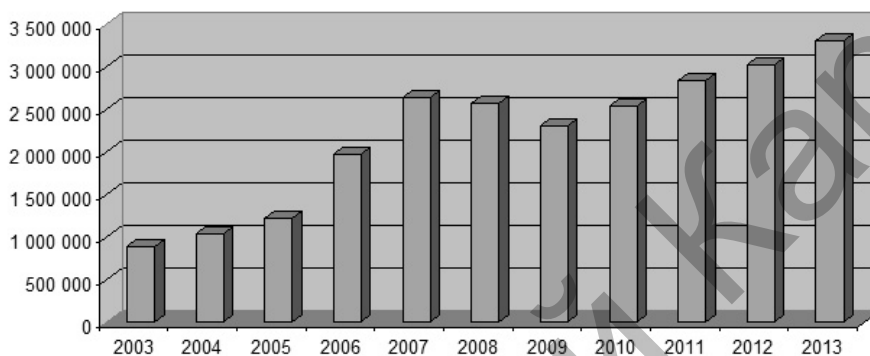


Figure 3. Number of served visitors in accommodation places

Table 2

Correlation between growth temp of number of served visitors in accommodation places and the number of hotels

Name of index	2010 y.	2011 y.	2012 y.	2013 y.
Growth temp of number of served visitors in accommodation places, %	111	112	106	109
Growth temp of number of hotels, %	121	100	102	110

In the Figure 4 shows Dynamic pattern forecast of increase in number of hotels and served visitors.

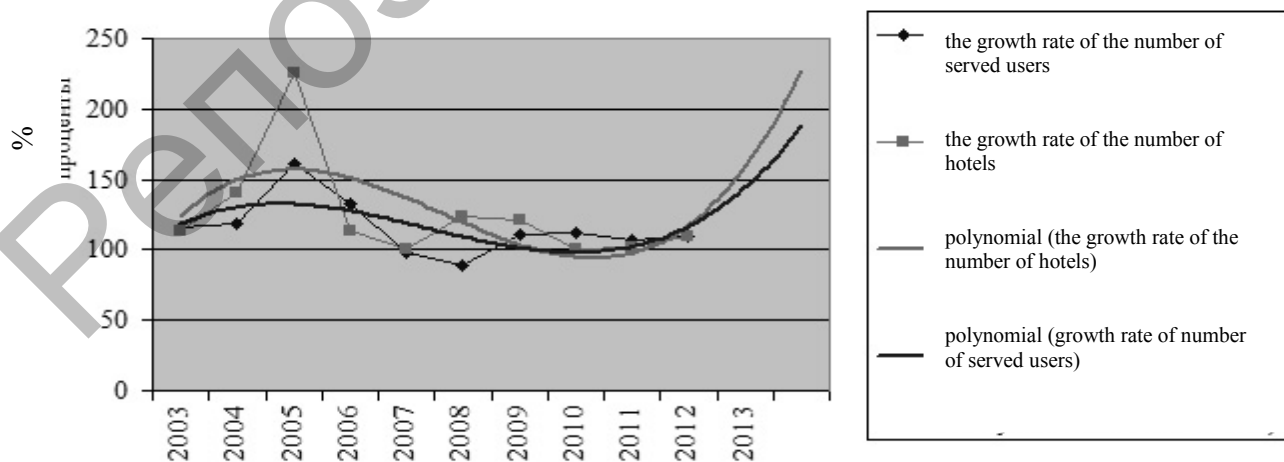


Figure 4. Dynamic pattern forecast of increase in number of hotels and served visitors

From the Figure 4 we can see that, in 2013 the growth temp in number of hotels and served visitors are equal. And by this forecast, the growth temp in number of hotels will exceed the growth temp of served visitors. This will lead to strengthening of competitive struggle in hotel market of Kazakhstan.

In hotel facilities there is used a five-speed form of service quality, which is governed from the point of satisfaction of client's expectation, their incongruity is called «disconnection in quality». The next factors affect to hotel services quality: safety, protection, reliability, service quality, availability, reputation, behavior of servicing person, understanding the needs, competence of person and correspondence of offered services.

Conception control of hotel services quality is oriented to technical and functional characters, including hotel interior, range of basic and additional services, analysis of claims, comments, suggestions of clients. In Kazakhstan ISO 9000 quality management system and general quality control are accepted. They are referred to better attachment of hotel services. Quality management on Kazakh hotel facilities is not realized in right way, restricting with control and account aspects. In the current context many hotel facilities produce and receive corporative, professional standards, realizing the importance of service quality.

Experts think that, Kazakhstan is good in development of franchising hotel companies and in production of own hotel nets. Construction of hotels need large financial investments, for example, for Marriott hotel in Aktau city. By the information of Kazakh Association of hotels and restaurants, there was invested 20 million \$, and the minimal deadline of payback is 7–10 years [4]. In last three years interests to hotel business were demonstrated in Almaty, Astana, Aktau and Atyrau. In these cities the lack of guest rooms is experienced. Operative, statistic data confirms this situation (Table 3).

Table 3

International hotel brands in Kazakhstan

City	International brand	The name of hotel	Investor
Realized projects of international brands			
Astana	Radisson SAS	Radisson SAS Hotel	LLP «Imcomeastana»
Aktau	Marriot	Renessans Aktau	Capital Partners company and «Kazcommercbank» JSC
Atyrau	Marriot	Renessans Atyrau	Capital Partners company
Astana	Rixos	Rixos President Hotel Astana	Fame Hotel company group Tourism Isletmecilik (there are more than 20 companies in the group)
Almaty	Hayatt	Hayatt Regency Almaty	Kazakh-Austrian enterprise «Rahat» JV
Almaty	Inter Continental	Intercontinental Almaty	Kazakh-Turkish cooperative enterprise «Ait honel» JSC
Planned places for international brands			
Almaty	Kempinski	—	Okan Holding Turkish company
Astana	Kempinski	—	Okan Holding Turkish company
Astana	Hilton Hotels	—	LLP «Expo- Astana center»

The hotels of Republic of Kazakhstan are characterized by the low coefficient of occupancy (24,3 %). It defines by high cost of hotel services and usage of private sector (renting rooms) for visitors' accommodation.

For the satisfaction to the requests of accommodation service in Republic of Kazakhstan the construction of two-star and three-star hotels is needed, which should contain the wide range of services and be satisfied be world standards. It is important to note that, costs for hotel services are not just high, but it continues to rise.

On the Figure 5 we can see distribution of hotel installation by regions of republic. In 2012 most of the hotel installation in Republic of Kazakhstan were placed in Almaty — 8 % (155), Astana — 8,4 % (120), in regions: East Kazakhstan — 15,2 % (127), Akmola — 14,8 % (212), Almaty — 13,7 % (196), Karaganda — 8,3 % (119), the lowest index was in North Kazakhstan region — 2,5 % (36).

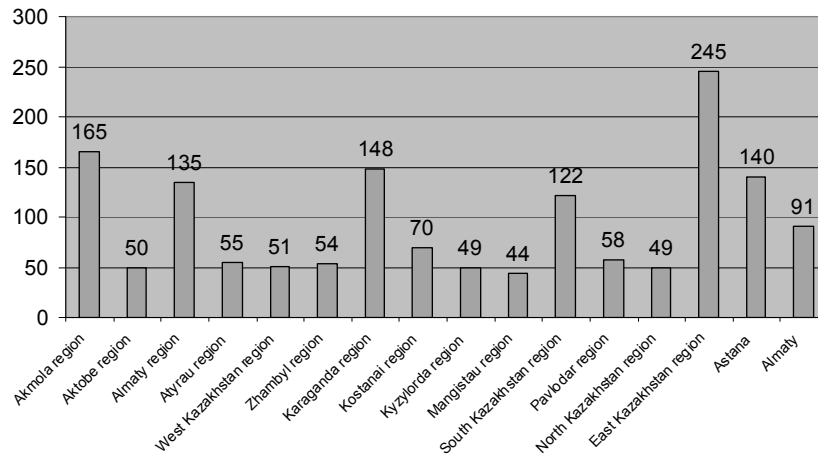


Figure 5. Number of accommodation places and individual entrepreneurs, working with visitors' accommodation, by the regions in 2012

Dynamic pattern of visitors served by hotel facilities is characterized by constant growth. So that, general number of visitors in 2012 increased to 49,6 % than the number in 2005. On 1st September 2012 1916297 people were served by hotel facilities, when in 2004 this index showed only 887493 people.

Basically, the growth in number of served visitors is related to increase stream of arriving foreign citizens with business purpose.

The Figure 6 shows the dynamic pattern of visitors served by hotel facilities in Republic of Kazakhstan from 2008 to 2012.

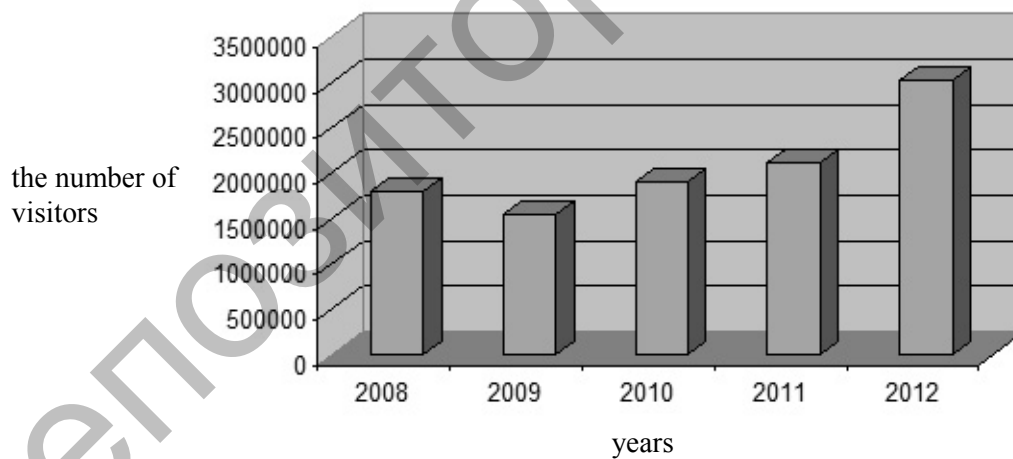


Figure 6. Dynamics of number of visitors served by hotel facilities in 2008–2012, people

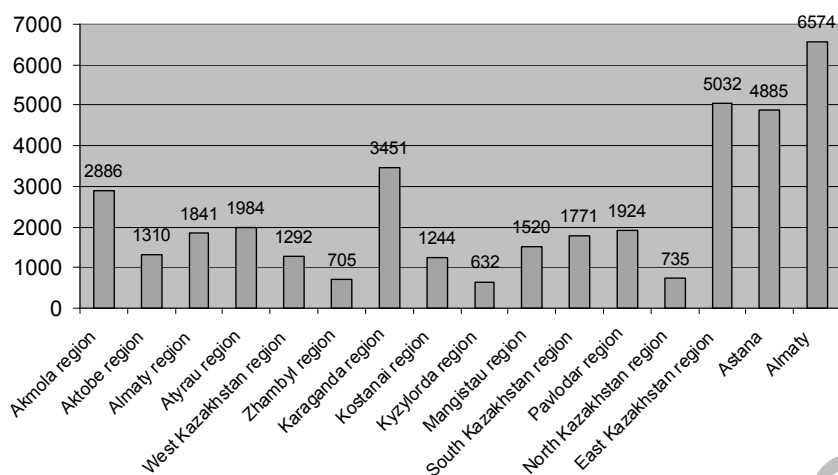


Figure 7. The number of rooms by the regions in 2012, units

Table 4

Number of accommodation places in Kazakhstan

Year	2006	2007	2008	2009	2010	2011	2012	2013
Republic of Kazakhstan	871	992	1149	1235	1414	1494	1526	1678

As we can see from Table 4 and picture 7, the number of accommodation places is increasing by the time, and if there will not be any problems with financial investment, then this tendency would continue.

If we analyze the condition of hotel industry of last years, we can consider a predominance of three-star hotels. More about this tendency we can see on the Figure 8.

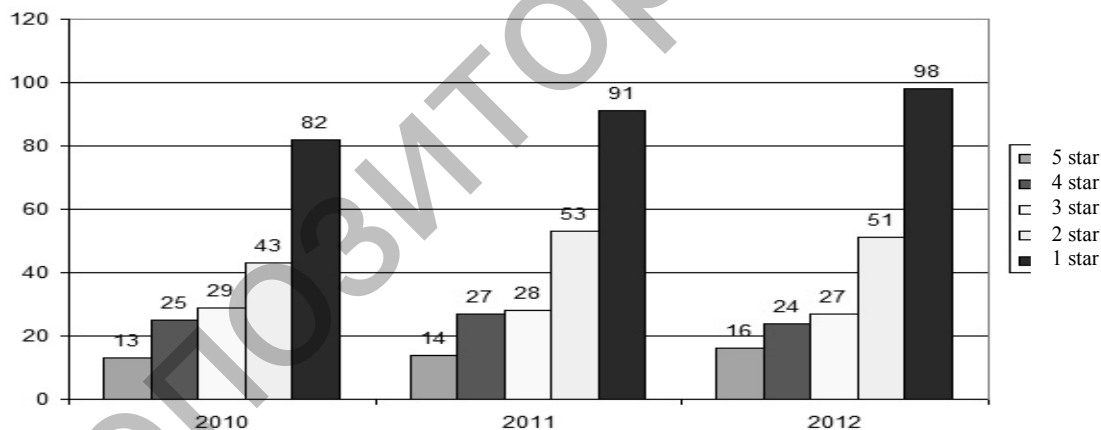


Figure 8. Division of accommodation places by categories

The predominance of three-star hotels is directly related with accommodation purposes of guests, especially with conference and business travel. On the picture we can see a clear predominance of people with business and leaving purposes. For these people it is enough the comfort of three-star accommodation places. On the Figure 9 it is illustrated number of visitors served by accommodation places by the travel purposes in thousand people in 2012.

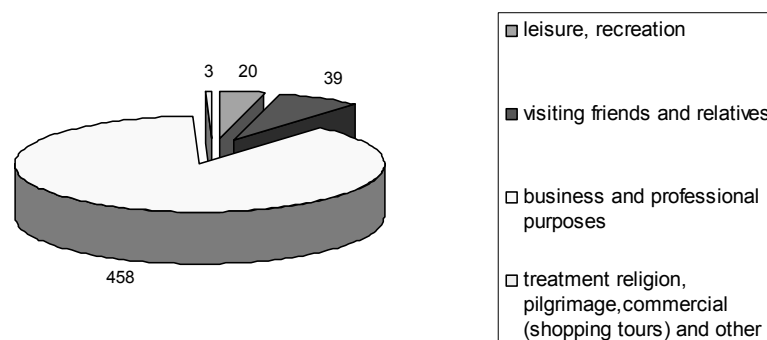


Figure 9. Number of visitors served by accommodation places by the travel purposes in thousand people in 2012

Now it can be seen that for Republic of Kazakhstan it is important to construct three-star hotels. From the point of current hospitality bed availability, the most prepared places for accepting tourists during the EXPO exhibition are Akmola, Atyrau, Almaty, Karaganda, Pavlodar, East Kazakhstan regions and Astana, Almaty cities.

The main work will be accepted to Astana. The Astana city has become an economic and political center of Kazakhstan. Over the last years the main economic and political arrangements are held in Astana city [5].

Analysis of hotel services development, considered in this article, showed that present hotel accommodation resources are weakly used. The average hotel occupancy in Kazakhstan is equal to 21 %. In addition, the number of hotels is increasing. The reason for low hotel occupancy is the high costs of hotel services and draft quality. In order to rise the quality of hotel services, it is needed to use franchise and other famous hotel nets.

References

- 1 *Tleuberdinova A.T., Ussenova D.M.* Theoretical foundation of formation and developmen of hospitality industry / Вестн. Караганд. ун-та. Сер. Экономика. — 2015. — № 3 (79). — С. 24–30.
- 2 *Mutaliyeva L.M.* Peculiarities of hotel and restaurant services marketing / Вестн. Караганд. ун-та. Сер. Экономика. — 2013. — № 4 (72). — С. 27–33.
- 3 Комитет по статистике Республики Казахстан: режим доступа. — [ЭР]. Режим доступа: <http://www.stat.gov.kz/>
- 4 Казахстанская ассоциация гостиниц и ресторанов. — [ЭР]. Режим доступа: <http://kagir.kz/>
- 5 *Tleuberdinova A.T., Usenov M.M., Ussenova D.M.* Analysis of the competitiveness of hotels in the Republic of Kazakhstan / Вестн. Караганд. ун-та. Сер. Экономика. — 2013. — № 2 (70). — С. 28–38.

А.Ж. Садуов, Б.О. Муқанов, М.К. Асанова, Д.Т. Нурсултан

Қазақстан Республикасында қонақ үй қызметінің дамуын талдау

Қазақстан Республикасында қонақ үй қызметінің дамуына талдау жүргізілді. Қазақстан Республикасында қонақ үй қызметінің дамуының ерекшеліктері — заңдылықтары, кемшіліктері және болашағы — анықталды. Қонақ үй қызметінің көлемінің аймақтық үйлесімсіздігі, сапасы мен қонақ үйлердің толтырымдылығы қарастырылған. Қонақ үй қызметінің сапасына ықпал ететін факторлары зерделенген. Қонақ үй қызметі ЭКСПО-2017 көрмесіне дайындық шарасы ретінде зерттелді. Сапарлардың мақсаты бойынша Қазақстанның қонақ үй кәсіпорындарына келушілердің құрылымы сарапталды. Қонақ үйлердің саны өсуіне және қызмет көрсетілген келушілердің серпініне болжам жасалды, Қазақстанның қонақ үй нарығындағы бәсекелестік күрестің келешегі туралы қорытынды шығарылды. Қазақстандағы халықаралық қонақ үй бренді және франчайзингі қолдану бойынша мәселелер талқыланды. Қазақстан Республикасында келешекте салынатын қонақ үйлердің сыныбы анықталды. ЭКСПО-2017 көрмесі кезінде туристік ағымдарды қабылдау үшін нөмірлер қорының саны аймақтардың дайындық дәрежесіне сәйкестігі талданды.

А.Ж. Садуов, Б.О. Муқанов, М.К. Асанова, Д.Т. Нурсултан

Анализ развития гостиничных услуг в Республике Казахстан

Проведен анализ развития гостиничных услуг в Республике Казахстан. Определены особенности их развития — тенденции, недостатки и перспективы. Выделены региональные диспропорции объёма гостиничных услуг. Рассмотрены вопросы заполняемости гостиниц и качества гостиничных услуг, факторы, влияющие на их качество. Гостиничные услуги показаны и с точки зрения подготовки к выставке ЭКСПО-2017. Рассмотрена структура посетителей гостиничных предприятий Казахстана по целям поездок. Составлен прогноз динамики увеличения количества гостиниц и обслуженных посетителей, сделан вывод о перспективах конкурентной борьбы на гостиничном рынке Казахстана. Освещены вопросы международных гостиничных брендов в Казахстане и применения франчайзинга. Указан класс гостиниц на основе перспектив строительства в республике. Проанализировано наличие номерного фонда с точки зрения подготовленности регионов для принятия туристских потоков во время выставки ЭКСПО-2017.

References

- 1 Tleuberdinova A.T., Ussenova D.M. *Bulletin of Karaganda State University. Series of Economy*, 2015, 3 (79), p. 24–30.
- 2 Mutaliyeva L.M. *Bulletin of Karaganda State University. Series of Economy*, 2013, 4 (72), p. 27–33.
- 3 Committee on statistics of the Republic of Kazakhstan, [ER]. Access mode: <http://www.stat.gov.kz/>
- 4 Kazakhstan association of hotels and restaurants, [ER]. Access mode: <http://kagir.kz/>
- 5 Tleuberdinova A.T., Usenov M.M., Ussenova D.M. *Bulletin of Karaganda State University. Series of Economy*, 2013, (70), p. 28–38.