

Almaty–Bishkek Economic Corridor Almaty-Issyk-Kul Alternative Road EIA

Supplementary Document: Travel Demand Estimations

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1 Travel Demand Estimations

This Chapter documents the development of quantitative travel demand estimations for the alternative road. First, using information from various sources, a base case with the existing travel is presented (see Chapter 4.4.1 of the main report and Chapter 1.1 of this Appendix). Induced travel due to shorter travel times and lower travel cost with the alternative road between Almaty and Issyk-Kul is described in Chapter 4.4.2 of the main report and Chapter 1.2 of this Appendix. Total travel demand, including newly generated travel as a result of economic development (see Chapter 4.4.3 of main report), is the subject of Chapter 4.4.4 of the main report and supported by Chapter 1.3 of this Appendix. Finally, the distribution of travel demand across seasons and over different trip durations (vacations, short stays) is included in Chapter 4.4.4 of the main report as well, with additional material in Chapter 1.4 of this Appendix.

1.1 Existing Travel

Traffic Growth Factors

Table 1: Sources for Compound Annual Growth Rate (CAGR) of traffic volumes

Assumption	Value	Source
CAGR – Korday Route	3%	EBRD, 2007
CAGR – Karkyra Route	3%	IFC, 2019
CAGR – Existing Traffic Almaty – Issyk-Kul	1.6%	ABEC Tourism Master Plan

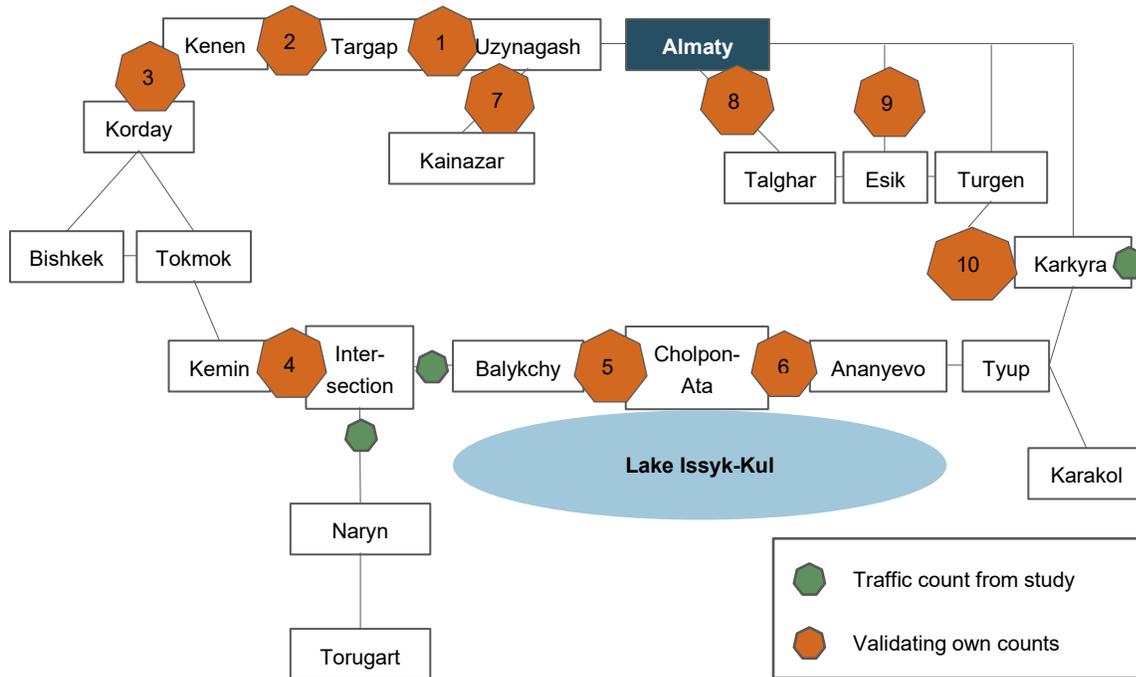
Traffic Volumes from Studies

Table 2: Traffic volumes extrapolated using CAGR

Year	Traffic – to/from	Average Annual Daily Traffic (AADT)	Source
2007	Balykchy	4,049	EBRD, 2007
	Naryn	849	EBRD, 2007
2019	Balykchy	5,773	Consultant Team
	Naryn	1,210	Consultant Team
	Karkyra (open 6 months)	750	IFC, 2019
2030	Balykchy	7,556	Consultant Team
	Naryn	1,676	Consultant Team
	Karkyra (open 12 months)	1,473	Consultant Team

Validating Traffic Counts by Consultant Team

Figure 1: Segments with Traffic Volume Counts



Source: Consultant Team

Table 3: Validating Traffic Volume Counts (Raw Data November 2019)

Segment #	Direction	Time Period	Passenger Cars	Vans, buses	Trucks	Others	Total Vehicles
1	Almaty	1:50 - 2:50 pm	113	17	23	8	161
	Korday		153	18	31	10	212
2	Korday	5:30 - 6:30 pm	240	12	46	22	320
	Almaty		319	23	33	8	383
3	Almaty	10:10 - 11:10 am	58	5	4	2	69
	Korday		54	11	7	4	76
4	Balykchi	3:35 - 4:35 pm	129	36	9	14	188
	Kemin		125	16	14	18	173
5	Cholpon Ata	10:35 - 11:35 am	35	5	3	9	52
	Balykchi		35	6	1	6	48
6	Ananyevo	3:20 - 4:20 pm	64	18	2	8	92
	Cholpon Ata		73	17	1	10	101
7	Kaynazar	4:20 - 5:20 pm	261	3	3	18	285
	Uzynagash		186	6	3	4	199
8	Esik	01:00 - 02:00 pm	328	11	11	35	385
	Almaty		402	28	9	24	463
9	Turgen	04:00 - 05:00 pm	171	8	1	15	195
	Almaty		196	8	4	12	220
10	Turgen canyon	02:20 - 03:20 pm	12	0	0	0	12
	Turgen		7	0	0	0	7

Source: Consultant Team

**Table 4: AADT Estimations Based on Traffic Volume Counts, 2019
(Adjusted for Time of the Day and Month of the Year)**

Segment #	TOTAL				
	Passenger Cars	Vans, buses	Trucks	Others	Total Vehicles
1	5,365	706	1,089	363	7,523
2	10,640	666	1,504	571	13,380
3	2,402	343	236	129	3,110
4	4,291	878	389	541	6,098
5	1,502	236	86	322	2,145
6	2,645	676	58	347	3,726
7	7,551	152	101	372	8,176
8	14,724	787	403	1,190	17,104
9	6,199	270	84	456	7,010
10	383	-	-	-	383

Source: Consultant Team

Diverted Traffic

Table 5: Share of Diverted Traffic

Assumption	Value	Source
Diversion via Balykchy	9.57% of traffic volume	EBRD 2007
Diversion via Karkyra	500 (2025)	CARs-3 Project, 2019 ¹

Table 6: Diverted traffic based on Table 2 and Table 5

Year	Traffic – to/from	Value AADT
2030	Korday Route	723
	Karkyra Route	519

¹ World Bank. 2018. *Project Appraisal Document on a Proposed Credit in the Amount of ... to the Kyrgyz Republic for the Third Phase of the Central Asia Regional Links Program (CARs-3)*. Weblink [accessed 31 October 2020]

1.2 Travel Induced by Alternative Road

Table 7: Cost factors, occupancy and elasticity

		Value	Source
Value of time		5 \$/h*pers.	ADB, 2016 ²
Out of pocket cost	Asphalt	0.1 \$/vehicle-km	EBP, local inquiries
	Gravel	0.11 \$/vehicle-km	NCAT, 2015 ³
Occupancy		3 pers. / passenger car	Ak-Jol BCP statistical data 2018
		30 pers. / bus	
Demand elasticity		-1.0	Assumption based on literature

Table 8: Calculations of induced demand between Almaty and Cholpon-Ata

			Travel time [h]	Border crossing time [h]	Total travel time [h]	Travel distance [km]	Total cost per trip [\$]	Induced demand	AADT
Existing Road (Korday)			6.4	1.0	7.4	460	157.3		723
West	New Kastek	gravel	4.1	0.17	4.3	291	96.6	39%	279
		asphalt	3.8	0.17	4.0	291	88.9	43%	314
	Masanchi	gravel	5.2	0.25	5.4	351	119.6	24%	173
		asphalt	4.5	0.25	4.8	351	106.9	32%	232
Direct East	Tunnel		3.5	0.17	3.6	260	80.6	49%	353
			1.7	0.17	1.9	86	36.4	77%	556
			3.2	0.17	3.4	216	71.9	54%	392

Source: Consultant Team

Table 9: Calculations of induced demand between Almaty and Karakol

			Travel time [h]	Border crossing time [h]	Total travel time [h]	Travel distance [km]	Total cost per trip [\$]	Induced demand	AADT
Existing Road (Karkyra)			5.8	0.17	6.0	350	125.0		519
West	New Kastek	gravel	6.2	0.17	6.4	432	142.8	0%	0
		asphalt	5.9	0.17	6.0	432	133.7	0%	0
	Masanchi	gravel	7.2	0.25	7.5	492	165.9	0%	0
		asphalt	6.6	0.25	6.8	492	151.7	0%	0
Direct East	Tunnel		5.5	0.17	5.7	401	125.4	0%	0
			3.4	0.17	3.6	213	74.8	52%	272
			3.6	0.17	3.8	263	83.3	47%	244

Source: Consultant Team

² ADB. 2016. Prefeasibility study for the implementation of ABC Almaty-Bishkek Corridor and possible extension with new transport means including high speed train connection. Manila

³ National Center for Asphalt Technology at Auburn University (NCAT). 2015. Report 15--02 Literature Review: The Impact of Pavement Roughness on Vehicle Operation Costs. Auburn, AL (USA). Weblink [accessed 31 October 2020]

1.3 Total Travel Demand, Economic Development

In addition to existing travel diverted to the alternative road (Chapter 1.1 of this appendix) and travel induced by shorter travel times and lower travel costs (Chapter 0 of this appendix), more travelers are attracted by an enhanced tourism product and additional potential destinations at both ends of the road. Induced demand from the road leads to more spending by tourists and other travelers, enabling investments that overall improve quality and increase capacity of the tourism product. This again makes destinations on both sides of the border more attractive, leading to additional travel demand and more spending (see Figure 2).

Figure 2: Schematic Depiction of Growing Demand as a Result of Economic



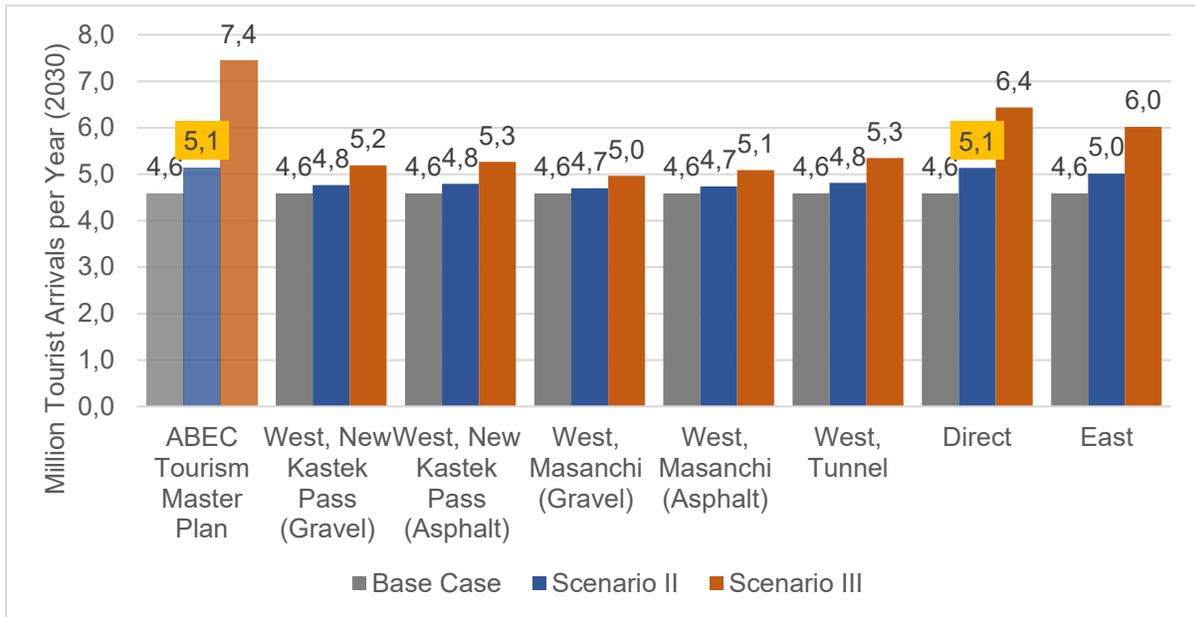
Source: Consultant Team

The forecasts developed in the ABEC Tourism Master Plan are used to scale the magnitude of the resulting total demand. The foundational assumption is that *the most attractive alternative, the Direct alignment, achieves to increase tourism demand to the level of forecasts in scenario II* (see yellow marks in Figure 3). All other alignments lead to a smaller travel demand increase, in proportion to their travel demand induction. An alignment leading to travel time and travel cost savings that are half as big as the ones enabled by the Direct alignment will have a travel increase, which is half as significant.

Scenario III includes more important infrastructure improvements and policy changes and therefore is forecast to lead to a considerably higher travel demand. Even the most attractive alignment cannot achieve a travel demand increase of that magnitude, as the alternative road between Almaty and Issyk-Kul is only one, albeit a significant, component of what constitutes scenario III. All alignments will, by themselves, achieve a travel demand increase inferior to the full tourism demand forecast for scenario III (see Figure 3).



Figure 3: Scaling of Travel Demand to the ABEC Tourism Master Plan Forecasts



Sources: ABEC Tourism Master Plan, Consultant Team

The following

Table 10 includes the necessary calculation steps leading to the resulting total travel and tourism demand by scenario and by alignment.

Table 10: Calculation of Total Travel Demand derived from ABEC Tourism Master Plan

			Scenario II				Scenario III				
			2019	Ref 2030	AIK 2030	2040	2019	Ref 2030	AIK 2030	2040	
ABEC	Total tourists		8,853,000				8,853,000				p.a.
Kazakhstan	Tourists domestic		2,189,000				2,189,000				p.a.
	Foreign inbound		1,605,000	2,094,627	2,305,236	2,605,000	1,605,000	2,094,627	3,109,635	3,514,000	p.a.
Kyrgyz Republic	Tourists domestic		1,179,000				1,179,000				p.a.
	Foreign inbound		3,880,000	5,539,528	6,298,999	7,419,000	3,880,000	5,539,528	9,377,604	11,045,000	p.a.
Tourists by origin											
Kazakhstan	Foreign inbound	Kyrgyz Rep.	1,334,511			2,165,982	1,334,511			2,921,789	<i>ABEC Tourism MP, Supplementary Document I</i> <i>(all non-Central Asian countries)</i>
Kyrgyz Republic	Foreign inbound	Kazakhstan	2,111,653			4,037,720	2,111,653			6,011,136	
		international	1,259,885			2,409,043	1,259,885			3,586,451	
Thereof to affected geographic units											
Almaty City / Oblast	Tourists domestic		1,927,186				1,927,186				p.a. 88% of total ROK ABEC
	Foreign inbound		1,174,898	1,533,316	1,687,487	1,906,921	1,174,898	1,533,316	2,276,325	2,572,330	p.a. 88% of total ROK ABEC
Issyk-Kul Oblast	Tourists domestic		748,441				748,441				p.a. 63% of total KGR ABEC
	Foreign inbound		2,140,286	3,055,716	3,474,655	4,092,470	2,140,286	3,055,716	5,172,876	6,092,645	p.a. 63% of total KGR ABEC
Additional trips 2030 p.a.											
Almaty City / Oblast	Foreign inbound				154,171				743,010		p.a.
Issyk-Kul Oblast	Foreign inbound				418,939				2,117,160		p.a.
Additional one-way trips											
Total person trips											p.a.
Thereof road											p.a.
Passenger car											p.a.
Bus trips											p.a.
Vehicle trips											
Passenger cars											p.a.
Buses											p.a.
Passenger cars											per day in 6-month season
Buses											per day in 6-month season

Source: Consultant Team

1.4 Distribution of Travel Demand

Seasonal Distribution

(See paragraphs 119-120 in the Almaty-Issyk-Kul Economic Impact Assessment)

Table 11: Monthly Factors for Travel Demand on Tourism Routes, Applied to CIS Tourists

January	0.78
February	0.84
March	1
April	0.88
May	1.02
June	0.99
July	1.31
August	1.42
September	1.17
October	1.06
November	0.74
December	0.79

Source: Swiss Norms SN640 005a

Table 12: Monthly Factors for Travel Demand, International Tourists

	KGR	ROK	Total
January	1%	3%	0.19
February	1%	2%	0.15
March	1%	3%	0.19
April	6%	9%	0.82
May	8%	10%	1.03
June	12%	13%	1.47
July	17%	13%	1.90
August	27%	17%	2.90
September	19%	13%	2.07
October	6%	9%	0.82
November	2%	4%	0.31
December	1%	4%	0.22
Weight	2.5	1	

Sources: Indy Guide (7,000 international travelers)⁴

⁴ Indy Guide. Tourism Platform. www.indy-guide.com (accessed 2 March 2020).

Table 13: Monthly Factors for Travel Demand, All Travelers

	CIS	Non-CIS	Total 12 m
January	78%	19%	69%
February	84%	15%	73%
March	100%	19%	87%
April	88%	82%	87%
May	102%	103%	102%
June	99%	147%	107%
July	131%	190%	140%
August	142%	290%	166%
September	117%	207%	131%
October	106%	82%	102%
November	74%	31%	67%
December	79%	22%	70%
Weight	84%	16%	

Sources: ABEC Tourism Master Plan (for weights)

Distribution of Trip Duration

(See paragraph 106 in the Almaty-Issyk-Kul Economic Impact Assessment)

**Table 14: "Weekend Trips" in Percent of All Trips
(Assumption: 0% of Existing and 80% of Additional Trips)**

			Scenario II	Scenario III
West	New Kastek Pass	gravel	38%	61%
	New Kastek Pass	asphalt	41%	63%
	Masanchi	gravel	29%	53%
	Masanchi	asphalt	35%	58%
	Tunnel		43%	64%
Direct		49%	68%	
East		44%	65%	

Source: EBP analysis

2 Interviews About Travel Behavior

While Chapter 1 of this Appendix documents the development of quantitative travel demand estimations (see Chapter 4.4 of main report), this Chapter 2 adds documentation for one of the foundational sources of assumptions made: Interviews were conducted to learn about people's travel behavior and its potential change motivated by an alternative road. Among the interviewees were residents of Almaty who could be potential travelers to Issyk-Kul (Chapter 0), tour agents in Almaty (Chapter 2.2), tourism stakeholders in Issyk-Kul like hotel managers (Chapter 2.3) and residents of Bishkek, for whom Issyk-Kul is already today within reach for short stays like weekend trips (Chapter 0). The results from the interviews are used in Chapter 4.3 of the main report.

2.1 Statmentes by Residents of Almaty

Statement by A.A.

I would like to see more ski resorts as well as more trail roads in the mountains. I also think that it is necessary to develop the infrastructure from Almaty to lake Kapchagay as well as to lake Issyk-Kul.

If the time travel from Almaty to Cholpon-Ata is reduced and the work of border control station is improved, I will definitely travel to Issyk-Kul more often, around 2-3 times during summer. I really like the nature around Issyk-Kul, so I would really like to travel to this region during the weekends not only to enjoy the lake, but also for hiking in the mountains.

I would also expect more and better transportation services, especially more affordable taxi instead of buses. I would expect that with alternative road and possibly new border control station it will be a lot easier to cross the border, as there will be less transport heading towards Bishkek for commercial purposes. I will also be willing to pay if there's going to be a development of the toll road towards Issyk-Kul.

Statement by A.S.

I know that there are a lot of places for tourism around Almaty, but I don't go out of Almaty very often. I really like walking around the city.

However, in terms of tourism development in the region, I would expect improvement of infrastructure from Almaty to the lake Alakol – “pearl of our region”. I think there should be better road and railway infrastructure. Currently, it is very inconvenient to get to Alakol – among other things, the stop at the railway station is very short.

I usually go to Issyk-Kul for 10-12 days once a year using the services of tour operators. I prefer taking my summer vacation in Issyk-Kul rather than in Turkey, most importantly because of its climate - I enjoy Alpine climate of the lake.

Currently, the road is very long, and it takes a lot of effort to cross the border control station, especially on the way back to Kazakhstan because of stricter inspection. It is also very inconvenient to cross the border due to the fact that you have to get off from one bus in Kazakhstan and then continue the journey in Kyrgyzstan on another bus, and vice versa. I also would like to note that the condition of the part of the road in Kazakhstan is poor, it is very narrow in certain places, while in Kyrgyzstan the roads are much better.

If there is an alternative road with shorter travel time from Almaty to Issyk-Kul, I will be willing to go there almost every week by my own car. And I am more than certain that if it takes much less time to get there (say, around 3-4 hours), a lot of Almaty residents will travel to Issyk-Kul with alternative road for a weekend.

Statement by V.K.

I believe that there is a huge potential for the development of domestic tourism in Kazakhstan. I know that there is also a big interest in tourism in Almaty region from foreign tourists. And we need to improve the infrastructure to a high level to meet such demand.

Personally, I really like hiking in the mountains in the vicinity of Almaty city. I used to travel to Issyk-Kul for a week or two during summer, once a year. The road is too long and there is too much difficulty with crossing the border.

If there is an alternative road to Issyk-Kul with much shorter travel time, I will be willing to travel there more often by my own car, for weekend, once or twice a month during summer. Honestly, I wonder why such road has not been built yet. I am pretty sure that there's going to be a large flow of tourists from Kazakhstan. Compared to weekend tourism around Almaty, Issyk-Kul has a great advantage due to the fact that it can provide a combination of mountain hiking and beach recreation. Maybe, with this road weekend tourism in Karakol will also be more accessible.

Statement by S.C.

I would like to see more recreation facilities in the most popular places for tourism around Almaty. Obviously, construction and repair of the roads to make these places more accessible for visitors.

For weekends, during different seasons I like to go to ski resorts around Almaty city, Chundzha hot springs and lake Kapchagay.

I used to travel to Issyk-Kul with my family once a year during summertime, minimum for a week. It takes around 8 hours for us to get there, and the current quality of the road is poor, especially in Kazakhstan, and on the northern coast of the lake from Balykchi. If an alternative road from Almaty to Issyk-Kul is constructed which will allow for much shorter travel time, I believe we will travel more often. 3-4 hours of travel won't take much effort to go to Issyk-Kul for a three-day vacation. In terms services in Issyk-Kul, I would say that it is quite expensive – it might be even in the range of prices as in Turkey and Egypt.

2.2 Statements by Tour Agents of Almaty

Premier Service Travel Company (<https://issykkul.kz/>)

If we consider internal tourism, there are a few popular places around Almaty city, such as Kolsay lakes, Charyn Canyon, Chuldzha hot springs and others. City tours inside Almaty are not very popular. We notice that there is a significant reduction in interest in internal tourism since 2012.

We expect that there should be significant improvement in infrastructure in the direction to Issyk-Kul and Alakol. The road to Alakol is of very poor quality, and until there is a good road from Almaty to Alakol, tourism in Alakol will suffer greatly. The prices are quite high too. We would also suggest that more hotels should be built in Alakol, as there is a big demand for recreation in Alakol, especially in peak season during summer.

Regarding the route to Issyk-Kul, our road until Korday is of very poor quality, too narrow. We would suggest widening of the road to provide 4 lanes. In Kyrgyzstan, the road is very good.

We believe that if an alternative road will cross the mountains, touristic buses will not be able to use the road, so the tourist flow will not have mass character. We think that there should be developments in the eastern route through Kegen because now it is very hard to use the road because of gravel pavement and the work of border control station is with very limited hours.

Algri Travel (<https://algritravel.kz/>)

I expect developments in infrastructure for the road to Alakol, additional flights to Usharal, and the road to Issyk-Kul through Kegen.

Alternative road with shorter travel time from Almaty to Issyk-Kul will allow for more frequent trips. The transportation prices will drop. Currently, people usually book tours to Issyk-Kul for a minimum of five days. Weekend trip tours of three days have much lower demand.

With the alternative road to Issyk-Kul, it can be expected that during summer people would travel less to Kapchagay, but I believe, interest in mountain tourism around Almaty, trips to Turgen and Issyk, would remain the same.

Tau-Komek (<https://taukomek.kz/>)

We expect better infrastructure from Almaty towards the lake Alakol. Currently, there are a lot of problems with getting there, especially in peak season. There is a huge demand, but there are not enough available tickets on train, and it is very difficult to get there by bus due to very poor quality of the road.

In terms of tourism from Almaty to Issyk-Kul, the demand is much lower compared to Alakol (approximately 90%-10%). We believe that it's not so much the long road to Issyk-Kul which makes it less popular than Alakol. People choose Alakol due to warmer water and some healing qualities of the lake compared to a colder climate in Issyk-Kul. So we wouldn't expect a significant change in the travel behavior of our customers due to shorter alternative road.

Complete Service (<http://complete.kz/>)

There is a strong interest among our customers in tourism in Alakol, so we would expect development of infrastructure in this direction: better road, more foodservices and toilets along the road. Same thing with touristic landmarks in the vicinity of Almaty city, such as Big Almaty Lake – there should be more foodservices, maybe more camping.

In terms of infrastructure from Almaty to Issyk-Kul, we think that an alternative road would only make sense if it considerably reduces the time travel, say, to 4 hours. Because people are mostly lazy and obviously, they will be readier to travel somewhere if it takes 2-3 hours rather than 8-9 hours. Shorter road would have a positive effect, making the way much less expensive and comfortable. Otherwise, we would suggest improvement of the current way – reconstruction of the road to a higher standard.

In terms of transport, we think that buses would remain the main transportation for tourists, unless there will be railway services available.

Shorter alternative road to Issyk-Kul would most likely make this touristic destination more attractive, but we don't think that the interest for other destinations in Almaty region would reduce by much. Everything is always dependent on the individual preferences.

2.3 Interviews of Tourism Stakeholders in Issyk-Kul

M.T. (Resident of Issyk-Kul)

<p>What development do you expect in tourism in your region for the next years?</p>	<p><i>Completion of the new road between South North which starts from Jalal-Abad and ends in Issyk-Kul.</i></p>
<p>What do you expect in terms of weekend tourism between Almaty and Issyk-Kul with a new road?</p>	<p><i>With the shorter road weekend tourism would have been grown and that would lead to sustainable development of tourism. Currently people get prepared only for seasonal tourism (2-3 months). If people are prepared for constant work, this would have impacted on the organized tourism in terms of the tourists and people who work for tourists in Issyk-Kul. Weekend tourism would change and solve existing problems (lack of wastewater treatment system, dealing with lake and beaches pollution just before the season, weak organized transport infrastructure that is focused only for season, lack of information centers, medical centers, vehicle maintenance). With stable tourism occupation service quality of service would grow too and motivating visitor for other type of resting in Issyk-Kul (not only lake and bathing), e.g., hiking, getting acquaintance with the local culture or shopping local products, and enhance the health resorts.</i></p>
<p>If weekend tourism will become feasible with a new road, what do you think is it that people would do less instead?</p>	<p><i>People in Issyk-Kul would work more and constantly due to more visitors that are induced by the new road. This would have an impact on having competitive prices, services among hotels and restaurants. But tourist would spend less time for traveling to Issyk-Kul.</i></p>

Z.T. (Owner and manager of hotel in Issyk-Kul)

<p>What development do you expect in tourism in your region for the next years?</p>	<p><i>They say that Arabic countries plan to construct a new circle road that would connect south and north part of Issyk-Kul which would enhance development of south part of the lake too.</i></p>
<p>What development do you expect for (a) Visitors in Issyk-Kul from Almaty (b) Visitors in Issyk-Kul having flown into Almaty airport</p>	<p><i>For now, our service is not oriented for differentiating tourists by their origin.</i></p>
<p>How would an alternative road between Almaty and Issyk-Kul change the groups' travel behavior?</p>	<p><i>This would impact on the tourists that initially arrive to Issyk-Kul spontaneously may decide to visit Almaty as well, for instance, guests from Uzbekistan, that lately start to come to region more and more, if the road becomes shorter. This opportunity would provide additional income for the local transport owners.</i></p>
<p>What do you expect in terms of weekend tourism between Almaty and Issyk-Kul with a new road?</p>	<p><i>If the road is going to be shorter, and the quality decent and the service at the border crossing point better the flow would definitely grow. As the travel times becomes shorter tourist would decide to choose the south part of the lake and not only the north, which is currently much more loaded rather than south side. Furthermore, their resting activities would become more diverse by visiting the farther places in the region.</i></p>
<p>If weekend tourism will become feasible with a new road, what do you think is it that people would do less instead?</p>	<p><i>The number of visitors would increase obviously, as my hotel is occupied by Kazakh people more than Kyrgyz. And for people living in Issyk-Kul this would have been a new opportunity to visit Almaty.</i></p>

M.J. (owner of cottage in Issyk-Kul)

What development do you expect in tourism in your region for the next years?	<i>Start of construction of the new ring road around the lake.</i>
What development do you expect for (a) Visitors in Issyk-Kul from Almaty (b) Visitors in Issyk-Kul having flown into Almaty airport	<i>There are tourists from Kazakhstan that wish to be met at the border with Kyrgyzstan and driven to the destination (Issyk-Kul), so we try to meet their needs.</i>
How would an alternative road between Almaty and Issyk-Kul change the groups' travel behavior?	<i>For those tourists that prefer to be met and brought by the tour guides might be easier and they may become more independent if the road is shorter and direct.</i>
What do you expect in terms of weekend tourism between Almaty and Issyk-Kul with a new road?	<i>Lately the number of visitors from Kazakhstan and Russia has been decreased and increase of tourists within the KG and from UZ can be observed. So, the direct road would serve for renewal of the flow from this direction.</i>
If weekend tourism will become feasible with a new road, what do you think is it that people would do less instead?	<i>Issyk-Kul might become for people from Almaty region as a first option for their vacations.</i>

N.S. (Association of Tour Operators based in Bishkek)

<p>What development do you expect in tourism in your region for the next years?</p>	<p><i>Government is actively working on attracting more visitors to Issyk-Kul by opening the new flights/train directions to Issyk-Kul from different regions, by filming commercials, spreading information, etc. So, it is expected that number of visitors in the region would grow. According to some predicative estimations number of visitors from Bishkek will grow too. That is because of development tendency of ski resorts and Bishkek people's interest in skiing is only growing and due to start of occupation little by little of the south side of the lake.</i></p>
<p>What development do you expect for (a) Visitors in Issyk-Kul from Almaty (b) Visitors in Issyk-Kul having flown into Almaty airport</p>	<p><i>There are no plans that focus on specific Almaty segment. Nowadays people just work according to market mechanisms.</i></p>
<p>How would an alternative road between Almaty and Issyk-Kul change the groups' travel behavior?</p>	<p><i>The Almaty Airport is larger in terms of coverage and capacities that Manas Airport. There are tourists from other countries that arrive to Kyrgyzstan through Almaty. Accordingly, for the visitors aimed to Issyk-Kul, this would be convenient to arrive directly rather than via Bishkek.</i></p>
<p>What do you expect in terms of weekend tourism between Almaty and Issyk-Kul with a new road?</p>	<p><i>This would impact on prolongation of seasonal tourism and possibly change the "seasonal" tourism in Issyk-Kul to «all time» period.</i></p>
<p>If weekend tourism will become feasible with a new road, what do you think is it that people would do less instead?</p>	<p><i>People would choose Issyk-Kul more frequent and this destination for them might become as an easy reachable option. Since the expenses for traveling become less, the savings might be spent at the destination as the tourist has allocated the money for the road more.</i></p>

2.4 Statements by Residents of Bishkek

1. U.Z., 36 years old, married, has one kid.

Last year I was in Issyk-Kul 3-4 times in summer. Every visit lasts from 3-5 days. If I am on vacation it lasts up to 5 days. So, for weekend, Issyk-Kul by family and myself is chosen in summer only. And we usually stay at our relative's private house when we are there. We prefer this place when it gets very hot in Bishkek.

Last autumn one of the weekends we have visited Almaty for 2 days and last spring Tashkent also for 2 days.

In summer for weekends my family also prefers places around Bishkek, like Ala-Archa gorge (40 km from Bishkek), Issyk-Ata, Chunkurchak, which also happens few times. Actually, our family does not have a habit of having rest for the weekends in other seasons other than summer. Generally, on weekends we just go out for dinner, amusement parks or places for children on those days within Bishkek.

2. C.U., 35 years old, married, has two kids

I am not an often visitor of Issyk-Kul. My family and I spend vacation in Issyk-Kul once a year in summer when it is hot and do not consider it for weekends, as I find it quite far from Bishkek and for 1-2 days of rest, I prefer shorter distances, as well prices in Issyk-Kul are quite high. In addition, if I had my own house I could go there for sure more often. We stay at various guest houses when we are in Issyk-Kul. For weekends for summer as well as for winter for skiing we usually visit places like, Ala-Archa, Chunkurchak and Supara, Skiing Resorts ZIL, Kashka-Suu. Counting roughly, we go outside Bishkek two times per season and not regularly.

3. E.Z., 39 years old, divorced, has one kid

I like Issyk-Kul and would like to visit the place more often, however, for weekends this place would be too far. It is not desirable to spend one day for driving and one day only to relax, when you have only two days off. Usually, I visit Issyk-Kul 3-4 times in summer and once in winter for skiing which usually happens with colleagues and friends. Last time it was Kara-Kol. I try to stay there at least for 3 days every time I visit.

For weekends couple times in summer and few times in winter we happen to go to Ala-Archa, Chunkurchak and Supara, Skiing Resorts ZIL (villages around Bishkek), however driving outside Bishkek for weekends does not happen regularly.

As we do not own a private house in Issyk-Kul, depending on availability we chose to stay at guest houses, private cottages. And when we are with colleagues we stay at hotels. It happens that every time we are at the new place. I want and have plans to have my own house there.

4. S.K., 68 years old, divorced, has four children

I rarely choose Issyk-Kul for having rest, as I do not like sunbathing much. And Issyk-Kul for now is oriented mainly for swimming and does not offer very much other recreation options. I spend

my vacations last 8-10 years in Dubai, Turkey, Korea, Moscow, China etc. not depending on seasons. However, my children do go to Issyk-Kul mainly in summer. And if I somehow decide to go there, I would approach my friends who have guest houses and whose business is hospitality in that area. For the weekends sometimes together with my friends and sometimes with relatives we prefer to visit places for having dinner outside the city. For ex. Supara few times a year. And generally, do not have rest on the weekends. I just take vacations several times a year.

5. A.S., 38 years old, married, three children

As our family owns a guest house in Issyk-Kul, namely in Chok-Tal (Balykchy), my family goes and have rest several times mainly in summer for swimming and bathing in the sun. My mother manages a guest house with my remote assistance. We have guests mainly in summer. We go to Issyk-Kul rarely in cold times, sometimes for skiing.

However, for not regular weekends we consider other places other than Issyk-Kul. When my children have school holidays, we prefer to have fun actively I would say children camps (several times a year) and for shorter weekends we prefer time passing in the city. Few times a year we also visit places with nice nature around Bishkek, like Ala-Archa, Chuk-Kurchak, where we can leave the city in the morning and be back in the evening.