

Методология. Эмпирическое исследование основано на количественном методе с использованием опроса в качестве инструмента сбора первичных данных. Анкеты, были распределены среди потенциальных потребителей при помощи метода «удобной выборки». Отношение потребителей касательно социально ответственных стратегий и практик предприятий туризма и гостеприимства было изучено с помощью корреляционного анализа Пирсона.

Оригинальность / ценность исследования. Исследование расширяет ограниченные теоретические знания об экологически и социально сознательном поведении казахстанских потребителей, изучая отношение потенциальных потребителей к устойчивым формам ведения бизнеса в сфере гостеприимства и туризма, и предлагает практические рекомендации для провайдеров услуг.

Результаты исследования показывают, что потребители с более высоким уровнем осведомленности об устойчивых моделях ведения бизнеса, как правило, готовы заплатить более высокие цены за экологически ответственные продукты и социально ориентированные предложения, соответствующие стандартам устойчивости, и такое поведение не зависит от уровня дохода или образования людей.

Ключевые слова – потребительское поведение, экологически и социально сознательное поведение, потребительское отношение, социально ответственный бизнес, туризм и гостеприимство.

ABOUT THE AUTHOR

Ainur Keneybayeva – PhD, Assistant professor, Director of the Research Institute for Social & Gender Studies, Kazakh National Women's Teacher Training University, Almaty, Republic of Kazakhstan, e-mail: ainur88ainur@gmail.com, ORCID: 0000-0002-9222-4364

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ANALYSIS OF KEY STEPS TO OVERCOME THE CRISIS IN TOURISM DURING A PANDEMIC: THE EXPERIENCE OF KAZAKHSTAN AND THE UNITED KINGDOM

A. Nurpeissova^{1*}, D. Md. Z. Islam¹

¹KIMEP University, Almaty, Republic of Kazakhstan

ABSTRACT

Purpose of research. The coronavirus (COVID-19) pandemic lockdown has created a significant threat to the global economy as well as the life of each of us. This paper examines the effect of coronavirus on tourism and proposes a framework of how Kazakhstan can adopt strategies from the international experience (e.g., the UK, Italy, Spain) in order to support tourism sector.

Methodology. To achieve the above-mentioned purpose, the study applies qualitative research method that includes in-depth literature reviews of secondary data including research publications (books, peer reviewed journal, reports, government portals, conference papers, online news/article sources etc.).

Originality / value. The study includes the analysis of the secondary data concerning the consequences of COVID-19 on economy through comparative analysis between the actions concerning the recovery process of two governments: Kazakhstan and the UK. Based on that the most appropriate recovery steps were presented that would be helpful for tourism support.

Findings. This study finds that in the short- term, it might be more appropriate for national economies to prioritize domestic rather than international tourism. Also, in terms of medium to long terms plans, it is important for Kazakhstan learning lessons from international experiences to take actions for the tourism recovery plan, e.g., the support scheme for heritage places and organizations.

The article recognizes the practical impact of this review that it can be consulted as an action plan (or hand-book) on which steps could be adopted to support tourism. The limitation is that this research is based on the secondary data which is scarce and that the COVID-19 is still happening and the recovery process is an ongoing event, there are not many reliable academic literatures published yet. The findings of the study are expected to aid the academics to conduct future in-depth research.

Keywords: national branding, investments, digitalization, tourism, strategic marketing.

INTRODUCTION

Nowadays the whole world faces challenging and uncertain times due to COVID-19 pandemic that has caused a global lockdown resulting in a major negative impact on global, national and regional economies as well as the life of each of global citizen whether for work, study or living. The first sign of COVID-19 appeared in late 2019 in Chinese city of Wuhan and slowly it spread all over the world. To prevent the spread of the disease, the World Health Organization and national governments took many steps such as scale down of international travel by air; social distancing requirements (maintenance of social distance i.e., 2 meters); sanitary rules (washing hands) and covering face with medical mask. Despite these preventative measures, the spread of the disease continued and many people lost their lives all over the world. At the beginning of 2020 the consequences of this pandemic resulted in first national and, subsequently, global lockdown. Different nations (e.g., Germany, Italy, the UK) tried to ease the lockdown process multiple times to lessen the difficulties of economic and social life. The direct impact of COVID-19 includes the closure of many companies and activities at global and national level. Many people lost employments. It is strongly believed that its impact would further have a major influence on world's economy and health. Under these circumstances, all nations are in the process of planning, reflection, re-thinking and re-planning their economic sectors such as tourism and development actions, and marketing strategies in order to maintain, attract foreign direct investment flow (hereafter FDI). It is now the fact of livelihood that countries, businesses, enterprises are striving to survive, and as one might argue how to adapt in this pandemic situation so that we can achieve rapid recovery. At the end of the day, the society need to understand and adapt to this situation by making further developments.

Due to coronavirus (COVID-19) crisis the global gross domestic product (hereafter GDP) decreased by 5,2 %, particularly Kazakhstan's GDP was forecasted around -3 % in 2020 [1]. According to OECD analysis as of April 2020 it was estimated that around 300,000 small-medium enterprises (hereafter SME) have stopped their businesses in Kazakhstan; to exemplify there is a decrease of factory-workers only in Almaty by 266 000 people and 80 % of entrepreneurs have suspended their activities in Almaty [2]. This leads to increase of unemployment rate, which reached the indicator of 5 % in 2020 [3].

After the ease of lockdown governments started the recovery process, which led to the fact that there is a trend of steady growth in Kazakhstan (please refer to figure 1 below). The region's economy is noted to be open to trade and financial flows but remain vulnerable (the same as all other nations) to the long-term negative effects of continuation of global shocks. In addition, it is expected that the growth rates of the economies in the region of the energy-exporting countries, including Kazakhstan will be affected by the continued low oil prices [4].

	2017	2018	2019e	2020f	2021f	2022f
GDP at market prices 2010 US\$						
Kazakhstan	4.1	4.1	4.0	3.7	3.9	3.7

Figure 1 – Kazakhstan's GDP Forecast

Note – compiled by the authors based on source [4]

In order to get an in-depth understanding of a country specific consequences of COVID-19 lockdown, it would be useful to observe on how developed country such as the UK was hit by this pandemic. We can learn lesson from tourism-based countries such as the UK, Italy, Spain that have applied steps and actions to lessen the impact COVID-19 on this sector. Based on these international experiences, it would be more convenient to decide which tourism recovery actions are more appropriate for Kazakhstan's case.

Experts fear that it would take the UK economy until 2024 to recover from coronavirus quarantine [5]. The global lockdown has resulted that unemployment rate in the UK “rose to 2.7 million in July, up by 117 % since March” [6]. More to the point the decline of GDP was by 22.1 % only covering the first half of 2020 but among European countries the UK was not hit the most by global lockdown, as can be seen from figure 2 below, Spain's indicators were higher and hits 22.7 % point with France being at the position of third-worst resulting in indicators of 18.9 % [7].

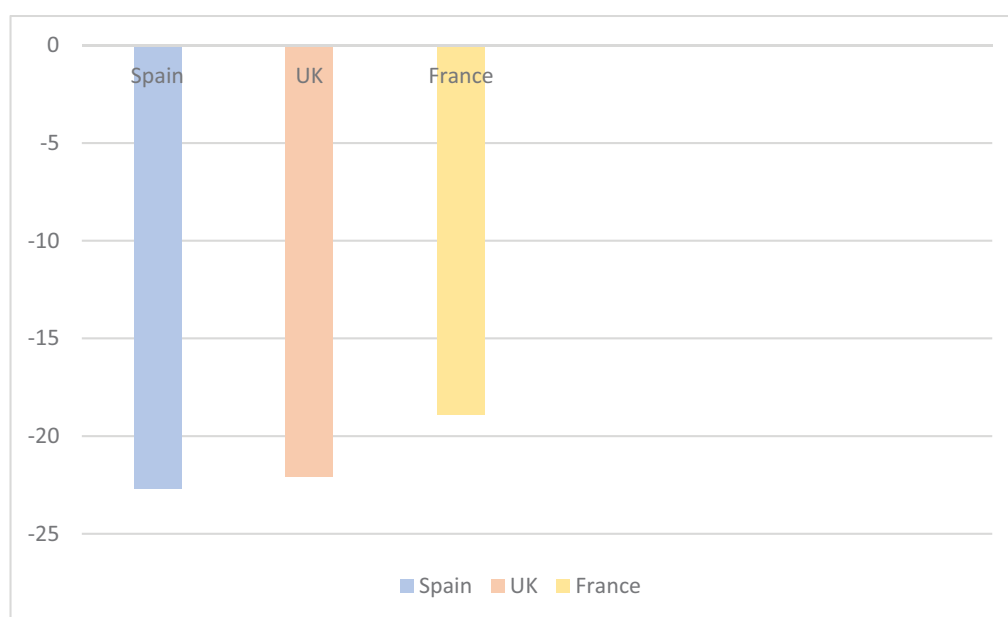


Figure 2 – GDP of Spain, UK, France in the first half of 2020

Note – compiled by the authors based on source [7]

At this stage the main question is what shall the national policy be and decision makers or industry leaders can do to minimize the negative consequences on the economies, particularly tourism and businesses after COVID-19 global quarantine?

Referring to the UK, most of 2019 the UK's economic growth was significantly affected by the uncertainty and complications that were caused by Brexit. On top of this, the effect of COVID-19 outbreak that put a serious pressure on the UK's economic growth. For example, the “government consumption fell in the first half of 2020” and “business investment fell by nearly a third in Q2” in 2020 [8]. Thus, the UK government intervention took steps to support businesses and entrepreneurs. In line with this need, the UK government cut taxes (particularly tourism sector to 5 %), support wages (Job Retention and Furlough Schemes) and offer incentives (Eat Out To Help Out scheme, stopped in August 2020) to keep the economy going and encourage consumers to spend [5]. Interestingly, there are some industries that were increasing their profit such as digital technology (e.g., Zoom), groceries, sanitary goods companies. However, the rest of the businesses were and is still struggling to survive and the office employees had to be relocated to a distance working mode.

As a part of intervention strategy, the UK government has announced the job retention scheme. The main idea of the scheme is that “a greater responsibility [was put] on the employer to fund employment costs” [9]. In this scheme, the employers need to pay 20 % of the salaries of their employees who cannot work because of COVID-19 [10]. The job retention bonus “allows businesses to claim a wage subsidy for each furloughed

worker that remains continuously employed until the end of January 2021” [8]. Also, the UK government offers the Coronavirus Business Interruption Loan (CBILS) to support businesses including SMEs that are losing their earnings and profits. The CBILS is based on the so-called ‘pay as you grow’ model, which is focused on the loan re-payments that would be prolonged from 6 -10 years and would also allow the users to spread the payments over FY2021/2022 [8].

Following such examples from the developed nations, in the short, medium and long-term scenarios, the intervention of the government such as subsidies, and support schemes would be vital for the economy in Kazakhstan as in other states. Majority of the businesses and enterprises are under major economic pressure; therefore, the government grants, incentives and subsidies would be important. Specifically, the crisis has engulfed all sectors including logistics, tourism, investments etc. So, the financial relief programs would, definitely, support businesses [11]. Also, the continuation of the social protection would be a must to slower the spread of the COVID-19 through the use of health requirements, sanitary norms and social distancing.

Therefore, as part of the short to medium-term planning scenarios, the government intervention, support and cooperation are essential. From the long-term scenario, the Kazakhstan government needs to focus on diversifying its economy and in fact, the government has been applying the diversification of its economy strategy for some time. To exemplify, introducing Astana International Center that is focused on the planning and setting up of the strategic development direction for the country. The further diversification strategies may include stages such as “increased regional integration, education and training programs in targeted economic sectors to boost resilience and mitigate the cost of shocks” [12]. The fact that Kazakhstan is the oil exporting country, but the current weakness in this sector resulting in the situation that the government does not have much influence on the global oil prices apart from adjusting the production volume to respond to the global oil pricing [13]. The crude oil prices declined to “levels not seen since 2002” due to the pandemic that has negatively influenced Kazakhstan’s economy [14]. Even before the pandemic, the oil price was on declining stage. It can be suggested that Kazakhstan’s economy is also vulnerable due to volatile oil price. To overcome such economic volatility and support the economy after the ease of lockdown, Kazakhstan’s government announced a support plan and state programs for individual enterprises, for example, put more attention and support to the agriculture business as it is one of the priorities of the country [13]. This is expected to create a positive impact on the national economy and, particularly, positively influence the national brand image and FDI flow into the country.

In regards to the support schemes for the employees Kazakhstan’s government offered a support of 42,500 tenge for those who lost their jobs due to COVID-19 crisis. Furthermore, as of April 2020, the government allocated around “237,5 billion tenge to state wholesale distribution centers to avoid overpricing” [13].

Despite all negative effects that coronavirus have caused, the Minister of National Economy of the Republic of Kazakhstan announced that there is a “positive dynamics in Kazakhstan’s GDP growth observed in the first nine months of 2020” and this, definitely, shows the “signs of revival of [Kazakhstan’s] economy” [15]. Furthermore, it was also announced that there is a growth in the following sectors:

- “The manufacturing industry provided growth by 3.3 %.
- Including the automotive industry – by 51.6 %.
- Paper products – by 15.1 %.
- Light industry – by 14.1 %.
- Construction volumes increased – by 10.5 %.
- Housing commissioning – by 9 %, or about 9.6 million square meters” [16].

Moreover, it is also stated by the Minister of National Economy of the Republic of Kazakhstan that there is an “increase in investment [particularly] in healthcare (85.7 %), communications (62.4 %), water supply (27.4 %), housing construction (25.2 %), agro-industrial complex (15.1 %), and transport (5.7 %)” [15].

There is a positive sign of renewal and increase of economy not only in Kazakhstan but globally. However, there is still a global fear that there would be a negative scenario of the recovery scheme, which may be provoked by the rise of more waves of coronavirus. This may lead to even harder consequences if countries would not be prepared. It is already detected as of October 1 2020 the rise of COVID-19 cases has been increasing in Europe, to exemplify “Germany, Italy, Portugal and the UK have all recently recorded their highest number of infections since the start of the pandemic” [17].

Due to the increase of COVID-19 cases some countries had to make stricter restrictions and even announce the second lockdown at the mostly affected regions. Nevertheless, experts forecast that “further outbreak scenarios” resulting in further quarantine would be less disruptive to the global economy in comparison with the first lockdown in spring 2020 [8]. In particular, it is less possible that there would be a total global or national quarantine as it may lead to even more complicated and long-lasting global crisis. Therefore, it is predicted that fewer economic sectors would be hit further. On a positive note, most businesses, enterprises, will learn from the past experience and continue operation, which would positively affect the recovery process. At this stage, majority of the businesses have already developed their own process of working (e.g., distance working mode with minimum disruptions). Due to the nature of operations, the only sectors that might get further restrictions are entertainment, hotels and restaurants.

The current research framework (figure 3 below) facilitates us to learn lessons from the past COVID-19 related national and international experiences, and understand what is the best option that can be implemented in Kazakhstan in order to maintain the national brand image, consequently the tourism sector at this stage. It is significant to minimize the adaption time for new reality. To be specific, if we cannot develop further, at least we have an action plan for maintaining the nation brand image, tourism and continue attracting FDI.

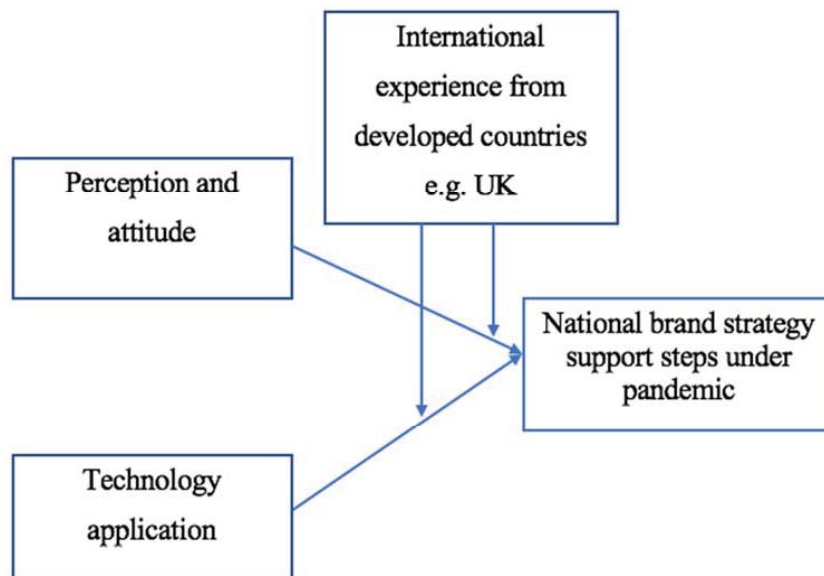


Figure 3 – Proposed conceptual framework of National brand strategy support steps under pandemic.

Note – developed for this article [18]

The authors believe that it is necessary to review and implement the experience of other countries in order to overcome the crisis in tourism sector. Therefore, this article would be based on the review of main steps that two governments Kazakhstan and the UK have implemented. Therefore, the main objective of this research is to review the set of actions that Kazakhstan and the UK have implemented to overcome crisis caused by pandemic and recommend Kazakhstan which appropriate actions can be used in regards to supporting tourism sector.

MAIN PART

Methodology. This is a conceptual paper and the writing is mainly based upon the qualitative research that includes in-depth literature reviews of secondary research publications (books, peer reviewed journal and conference papers etc.). The COVID- 19 pandemic is an unprecedented situation that has overwhelmed all countries. Different governments are trying to tackle the economic and social aspects in varying ways. It is an ongoing event and thus, there are not many academic literatures published in peer reviewed journals or books. Keeping this fact in mind, the government portals, news and online reports were consulted in order to

obtain reliable and up-to-date materials and data. This research used ongoing news or bulletins published daily, weekly, monthly for example, daily newspaper (e.g., Kaz.Inform, Financial times, The Guardian), government websites (e.g., the UK Government, Ministry of industry, trade and tourism in Spain), electronic news resources (e.g., BBC, OECD, United Nations, CNBC, Sky News websites), databases, articles and reports were consulted in order to get up to date and reliable materials.

Considering the objective of this research, the paper adopts the technique of analyzing international experiences and learning lesson from the tourism-based countries in order to get wider perspective on which steps would be appropriate to Kazakhstan adopt and implement to support tourism sector.

Perception and attitude. The global atmosphere of uncertainty that is happening all around the world pushes businesses and people to re-think the way they live, do business and travel. It is essential to realize that this pandemic is causing severe changes on tourists' and businesses' behaviour. The phenomenal transformations that are happening now allow people to have an opportunity to think and reflect and appreciate every possibility. Specifically, in regards to the business world to be able to continue their work under different circumstances to be resilient and use various possible channels to maintain business activity. People in general and each individual in particular would have to re-think, adapt or change their perceptions and attitude towards the lifestyle and travelling habits.

Referring to the travel habits, it can be argued that travel would not be cheap and affordable anymore. Many airlines have shut their routes and job cuts due to the pandemic. This situation suggests us to foresee that cheap airlines, affordable hotels would very much struggle under pandemic reality, as a result some of them would go bankrupt. During this extreme weak situation, an alternative can be that there could be a development of domestic tourism in Kazakhstan. The domestic tourists are expected to prioritize the domestic travel and visit the beauties of their home countries. However, as one might suggests this might create a struggle for national brand image promotion and increasing FDI flow into the country. This is due to the fact that less international visitors can travel to Kazakhstan, which may decrease the awareness of available opportunities offered by the country.

As can be noted that now the major issue for the travel sector besides the total lockdown is the self-isolation requirement, which is mandatory by the majority of countries. This is challenging for both: businesses and travelers. Considering the negative consequences, it can be seen that countries are changing the travel requirements and restrictions along the negative and positive progress due to COVID-19. Of course, some important rules remain the same all around the World i.e., following sanitation norms, maintaining social distance.

<p><i>"Scenario 1 (revised): International tourist arrivals start to recover in July, and strengthen progressively in the second half of the year, but at a slower rate than previously foreseen (-60%)."</i></p>	<p><i>Scenario 2 (revised): International tourist arrivals start to recover in September, and then strengthen progressively in the final quarter of the year, but at a slower rate than previously foreseen (-75%)."</i></p>	<p><i>Scenario 3 (new): International tourist arrivals start to recover in December, based on limited recovery in international tourism before the end of the year (-80%)".</i></p>
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Figure 4 – Three scenarios by OECD as the recovery forecast from COVID-19

Note – compiled by the authors based on source [19]

Three scenarios (please to refer figure 4 below) of recovery forecast of tourism sector were presented by Organization for Economic Cooperation and Development (hereafter OECD). The forecasts depict the decrease of international tourism economy in 2020 by 60-80 % [19]. Severe disruption of global economy, which led to the crisis have caused a long-term effect that may allow economies as well as tourism sector to extend the recovery process even into 2021 globally. It is predicted that there may be more waves of the pandemic, which creates even more vulnerable atmosphere and make the crisis more complicated to recover from. In this situation the domestic tourism would compensate international travelling and would help tourism sector and countries to rapidly recover from the crisis. Furthermore, this will also support the economy as people may find employment in domestic travelling. These all affect they perception and attitude of people. In other words, overall customers became very safety-conscious, nervous and uncertain.

The process of recovery for international tourism is expected to be very slow after the global quarantine. This suggests that different countries will slowly re-open their borders in accordance with the progress of epidemic and health situation in each particular country. Before opening the international borders, each country will consider their own condition how to re-open the border. Majority of the countries have announced mandatory self-isolation requirement when visitor arrives at the particular country. Specifically, each state announced the list of countries and the travelers who arrive from those areas are required to be either isolated for a certain period of time depending on their port of departure (it is mostly period of 14 days lockdown), or there are not direct flights to certain states, or there are no limitations. Also, there is a condition of providing the negative COVID-19 test results (valid for certain period of time) on their arrival for some travelers from certain countries. To exemplify, Kazakhstan announced three categories of countries, so the visitors who arrive from the first category list are required to check the body temperature on their arrival. The second category list states are required to be isolated for 14 days if they fail to provide the negative coronavirus (COVID-19) test results that is only valid for a certain period of time [20]. Countries that are in the third category cannot travel to Kazakhstan at this stage due to the fact that regular flights are not permitted yet.

In the case of European countries, the UK government provided the travel corridors with certain countries that do not need to self-isolate on arrival to the UK. Other countries that are not on the list of the travel corridor need to self-isolate on arrival for 14 days this applies to both general visitors and residents [20]. If a traveler is not from a country on the travel corridor list but arriving to the UK from a country on the travel corridor list in this case the visitor would need to stay 14 days in the country that is in the travel corridor list, after his arrival to the UK this certain visitor would need to spend 10 days on self-isolation [21].

Also, Italian government divided countries into the categories from A to F where A is the category that includes regions without any limitations for the visitors on their arrival. F is the category where banned countries to visit Italy are located [22]. Briefly, the countries which are in the category B need to provide the negative coronavirus (COVID-19) test results, the left categories of countries would need to self-isolate in accordance with the regulations for particular countries that these visitors are arrived from.

From the above-mentioned examples under pandemic reality, there are three options of new global traveling procedure on the arrival depending on the countries:

1. No limitation;
2. Availability of negative coronavirus (COVID-19) test results (valid for certain time period depending on the countries);
3. Self-isolation (vary by port of last departure and country that the traveler arrived to).

All of the above experiences depict the fact that it is a very challenging times for international travel industry and every single state is trying to support this sector by offering incentives and government recovery schemes. In particular, Kazakhstan implementing policies and government support schemes in order to stimulate the rapid recovery. The Minister of National Economy of the Republic of Kazakhstan noted that the tourism sector will be provided with tax preferences for the implementation of tourism investment projects in priority tourist zones as part of the plan for economic recovery by the end of 2020. Particularly, the benefits for corporate income tax (CIT), property tax and land tax are planned to be announced [23]. Specifically, it was stated that the recovery stimulation steps for the tourism industry and the related businesses are on the agenda of the state. The government incentives include following steps:

- “Reimburse [of] 25 % of the costs of business entities for the construction of roadside service facilities in accordance with national standards;
- Subsidizing the costs of maintaining sanitary facilities [at the certain amount];
- Reimbursement of 25 % of the cost of purchasing ski equipment;
- Reimbursement of 25 % of the costs of tour operators and travel agencies for the purchase of tourist class vehicles;
- Subsidizing the costs of tour operators for each foreign tourist;
- Reimbursement to airlines of 100 % of the carriage charge for children on domestic flights” [24].

Furthermore, Kazakh Tourism in cooperation with regional authorities (akimats) organized various educational events such online conferences, webinars concerning tourism industry in order to support businesses [23]. Also, the tourism sector representatives developed the marketing related action plan in order to maintain the Kazakhstan’s promotional strategy. In particular, the action plan consists of:

1. Organization of stands representing the Republic of Kazakhstan on the major tourism exhibitions scheduled for 2020-2021;
2. Road shows abroad (in Russian Federation, Europe (Frankfurt, Paris, London, Vienna), the Middle East (Dubai, Riyadh, Doha, Muscat, etc.) scheduled for 2020-2021;
3. Information for foreign tour operators, travel agencies, journalists, bloggers, media and for domestic travel companies;
4. Online exhibitions and B2B webinars in the Russian and Chinese markets” [25].

In addition, the domestic travel was prioritized in 2020. To exemplify, the auto-tourism is experiencing rapid growth [26]. Particularly, visitors re-discover domestic travel places such as lake Kobeytuz near Nur-Sultan; Burabay lake in Akmola region; Kolsai Lake in Almaty region.

The European countries that are mainly focused on tourism sector were hit very seriously by this pandemic. Particularly, European countries are expected to reach the “decline between 30-40 % in 2020, compared to 2019” [27]. To exemplify, it is estimated that the loss in spending in Italy from “overseas visitors [would reach] €24.6 billion and domestic traveler [would be around] €43.6 billion” [28]. In Barcelona, Spain, it is predicted that “at least 15 % of business and one in four restaurants will close permanently” as a consequence of the COVID- 19 crisis [29]. There is a severe effect of coronavirus on European tourism sector, it is noted that “70 % of hotels in cities like Rome and Florence and 20% in coastal areas never reopened after the lockdown” [28]. The largest decline in arrivals in 2020 was in France, it reached a decline by -38 %, the UK is at the decreasing stage as well it reached -14 % fall in the arrivals in 2020 (please refer to figure 5 below).

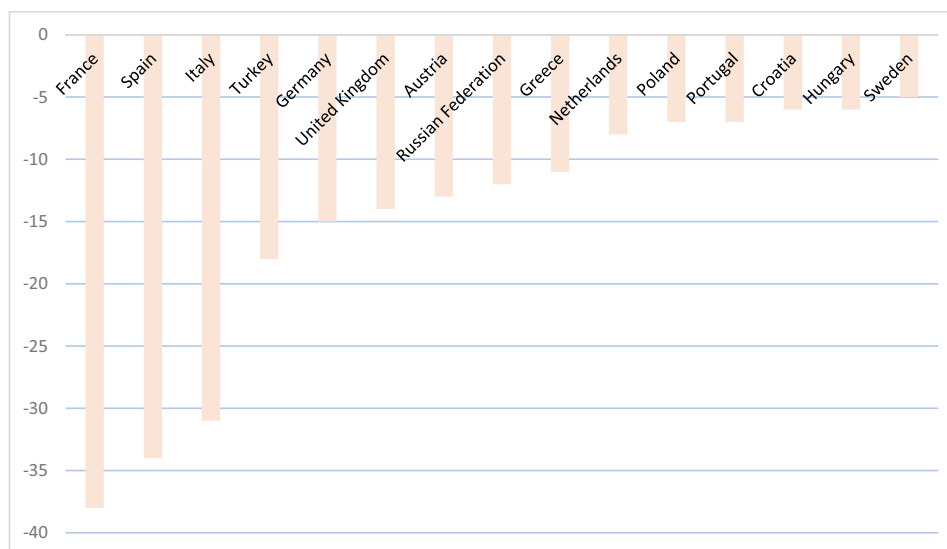


Figure 5 – Inbound arrivals: largest decline in arrivals, 2020
Note – compiled by the authors based on [30]

As a part of government intervention and support plan in tourism sector, the UK government have appointed the Tourism Industry Emergency Response Group that works as a bridge between the state and the tourism business representatives. The UK government as a part of the recovery scheme have announced the “Kick-start the tourism package” in July 2020 [31]. Specifically, according to this support scheme the state will provide about £10 million funding in order to help and recover the tourism sector in the UK. More to the point small business as a support and as a part of the COVID-19 recovery plan will get of up to £5,000; in addition, the “New Deal” was also announced that allows additional £5 billion to support economic recovery [31].

Following the support plan provided by the UK government it would be useful to add that in order to recover and renew the cultural objects the Culture Recovery Fund is aimed to support and maintain the heritage organizations in the UK, so the support of £1.57 billion within the Culture Recovery Fund is provided by the government [32].

As of 9 October 2020, the UK government have announced an update on the government support incentives. In particular, it was decided that the “Job Support scheme will be expanded” [33]. The Job Support scheme would be expanded in the following structure:

- *“Pay two thirds of employees’ salaries to protect [their] jobs [or] up to a maximum of £2,100 a month”*
- *Grants for businesses [that were] required to close in local lockdowns also increased to up to £3,000 per month*
- *Under the expansion, firms whose premises are legally required to shut for some period over winter as part of local or national restrictions will receive grants to pay the wages of staff who cannot work - protecting jobs and enabling businesses to reopen quickly once restrictions are lifted”* [34].

In addition, as an example, Italian government has introduced the economic stimulus measures that concern tourism, logistics and transportation [35]. Spanish government has offered the government grants for up to €485,000 for the support of tourism industry [36].

All of the above examples indicates that it is important to continually evaluate, re-consider and re-adjust the existing support schemes in order to maintain the rapid economic recovery and even reach before crisis steady growth. It shows that international experience is essential in terms of learning a new perspective of expanding the existing recovery plan. To exemplify, for the country such as Kazakhstan it can be suggested that the tourism sector support plan would be more beneficial if it would be planned and implemented in cooperation with the support scheme for state heritage places, and organizations. In other words, potential investors, travelers when visiting a certain place put most attention to the heritage of this particular area. In other words, in order to be unique and interesting for general visitors, tourists, and potential investors it is important to attract them by unique selling point that the country has to offer from natural beauties to available projects.

The World Tourism Organization (hereafter UNWTO) has launched a new Tourism Recovery Tracker to support global tourism [37]. The tracker facilitates up-to-date information on global tourism sector and the steps for further recovery, and renewal. The statistics on international tourism sector illustrates the major drop “by 60-80 % worldwide [of number of tourists] in 2020” this is due to the COVID-19 led crisis [38].

Despite all the above the experts’ forecasts are mainly positive, it is estimated that in 2021 the sum of visits to all destinations in the world is at a positive trend in compare with 2020. Particularly, indicators depict that the visits of all destination in the world reached -40,1 % in 2020 in compare with the experts’ forecasts for 2021 when the visits of all destinations in the World recover and estimated to reach 34,9 % [39].

The recovery and renewal actions for tourism sector are based on 5 priority tasks according to the experts:

- *“To mitigate the socio-economic impacts of the crisis;*
- *To build resilience across the entire tourism value chain;*
- *To maximize the use of technology in the tourism sector;*
- *To promote sustainability and green growth;*
- *To foster partnerships to enable tourism to further support the Sustainable Development Goals”* [38].

It is suggested that the main concern in tourism sector recovery plan should be the focus upon the availability of jobs, stable income and support of heritage places, and organizations in every single country all around the world.

RESEARCH RESULTS

Technology application. Referring to the conceptual framework of this paper (figure 3 above) the application of digital technology might be one of the appropriate steps to maintain and support tourists' attraction steps as well as the national brand image and, consequently, increase FDI flow into the country. The authors argue that the online integration into national branding strategy could be a very positive and cost-effective strategy. Particularly, integrating digital technology tools and social networks such as live videos and livestreaming. This would be very beneficial for national branding by allowing their target audience to view the videos of various tourist destinations with availability of 24/7/365 basis. More to the point the video clips regarding a particular tourist destination such as Shymbulak, Charyn Canyon would also be available. In regards to the businesses the videos or livestreaming by experts explaining the project itself and the advantages of each of special economic zones' projects (hereafter SEZ) (please refer to all SEZ projects that operate in Kazakhstan below). All of these might be presented to potential investors on request or demand. Furthermore, the explanatory videos about each of SEZ project, discussions, conference calls with experts would also positively affect the national brand strategy promotion. In addition, the digital events e.g., meetings with each of SEZ consultants would be very convenient and time conscious for potential investors. The cooperation between government and businesses is a priority for the integration of the digital technologies, and platforms into the further development of national branding.

SEZ projects that are established in Kazakhstan [40].

- *'Astana, the New City' in Nur-Sultan (the expiry date 2027).*
- *'Aktau Sea Port' in Aktau (the expiry date 1 January 2028).*
- *'Ontustik' in Sairam district of South-Kazakhstan region (the expiry date 1 July 2030).*
- *'National Industrial Petrochemical Park' in Atyrau region (the expiry date 31 December 2032).*
- *'Park of Innovative Technologies' (the expiry date 1 January 2028).*
- *'Saryarka' in Karaganda region (the expiry date 1 December 2036).*
- *'Horgos - the eastern gates' in Almaty region (the expiry date 2035).*
- *'Pavlodar' in Pavlodar (the expiry date 1 December 2036).*
- *'Chemical Park Taraz' in Taraz (the expiry date 1 January 2037).*
- *'International Center for Cross-Border Cooperation Horgos' in Almaty region (the expiry date 1 January 2041).*
- *'Turkestan' in Turkestan region (the expiry date 1 January 2043).*

The educational institutions, organizations, businesses as well as entertainment industry are trying to embrace the e-platforms (such as Zoom, Google meet) in order to follow the health regulations and avoid face-to-face meetings. The livestreaming sessions would be beneficial as a part of the national branding strategy. The livestreaming sessions could be divided into various sectors. For example, enterprises introducing the short videos of their business activities and SEZ projects are being introduced by a series of videos regarding each economic zone. The idea of virtual consultation with appropriate experts could be very useful for national brand image as well. So, the potential investors initially may get all needed support avoiding the travelling. These all would benefit the action plan for maintaining the tourism and national brand image, consequently, increasing FDI attraction under pandemic.

In addition, the digital application could also be in a video chat call or video conference calls format, especially adding the guide lectures that could be posted on a special designed website. These steps would further be supported by Instagram, YouTube and Telegram channels in order to receive up-to-date information in one place. These steps would allow representatives of national image promotional team, businesses to be connected with the target market and make sure potential investors as well as travellers still get all needed information even under pandemic restrictions.

Conclusion. A key to a rapid recovery and sustainable growth is the constant adjustment to the current economic, political and health related aspects all around the world. We learned the lesson that it is significant not only to rely on own experience but to consult other nations' experience and work in cooperation with industry in order to overcome challenges such as COVID-19. The government interventions and support are vital for businesses. There are some incentives or support steps that can be adopted and adjusted from international

experience concerning tourism and cultural sectors. To exemplify, the schemes such as the Kick-Start tourism package that focuses on supporting tourism sector and Cultural Recovery fund that focuses on helping to maintain the heritage places and organizations to overcome the crisis. The authors recommend these schemes for the tourism sector in Kazakhstan to analyse and develop their own strategy in this direction. Particularly, for the state that is not mainly dependent upon the tourism sector, the international experience such as above-mentioned ones would be vital. National brand image that is linked with attraction of FDIs is heavily rely upon the visitors both general visitors as well as potential investors. Thus, it is significant to make sure that the tourism sector would rapidly recover from COVID-19 led crisis. The encouragement and support for GDP growth and rapid economic recovery is crucial. In other words, the number of general visitors, potential investors arrival to Kazakhstan positively influences the growth of GDP of the certain state (making sure every single traveller follows all sanitary, health rules provided by government, health and border regulatory organizations).

Also, the digital and technological transformation is essential step especially under pandemic. The digital application allows the use of social networks and media in order to build and maintain a perfect foundation for the leading brand image. The social media platforms are the perfect tools (e.g. YouTube, Tiktok, Telegram, Zoom) that let us reach the target audience on a 24/7/365 basis all around the World. It is crucial to maintain the confident and strong national brand that would support Kazakhstan under any uncertainties and challenges.

The practical implications of this study are that it provides action plan for both state and businesses based on the analysis of international experience on the recovery process schemes in Kazakhstan. Particularly, the helping maintaining the heritage places as a part of the tourism support scheme would have a long-term positive impact. The main limitation of this paper is that it based on the secondary data collection method due to the fact that COVID-19 research is an ongoing event and thus, there are not many reliable academic literatures (peer reviewed journal papers or books) published yet. Therefore, the paper consulted other government portals and reports in order to get a reliable and updated information.

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ПАНДЕМИЯ ЖАҒДАЙЫНДАҒЫ ТУРИЗМДЕГІ ДАҒДАРЫСТАН ШЫҒУ ШАРАЛАРЫН ТАЛДАУ: ҚАЗАҚСТАН МЕН ҰЛЫБРИТАНИЯНЫҢ ТӘЖІРИБЕСІ

Ә. Нұрпейісова^{1*}, Д. Мд. З. Ислам¹

¹КИМЭП Университеті, Алматы, Қазақстан Республикасы

АНДАТПА

Зерттеу мақсаты – коронавирус (COVID-19) пандемиясы әлемдік экономикаға, сондай-ақ әрқайсымыздың өмірімізге айтарлықтай қатер туғызды. Бұл ғылыми мақалада коронавирустың туризмге әсері қарастырылған. Осы зерттеу арқылы Қазақстанның туристік секторын халықаралық тәжірибе (мысалы, Ұлыбритания, Италия, Испания) негізінде жасалған қолдау схемасы ұсынылады.

Әдіснамасы. Жоғарыда аталған мақсатқа жету үшін зерттеуде екінші деңгейлі деректерді, соның ішінде ғылыми жарияланымдарды (рецензияланған журналдар, есептер, үкіметтік порталдар, конференциялар, жаңалықтар / мақалалардың дереккөздері) терең талдауды қамтитын сапалы зерттеу әдісі қолданылады.

Зерттеудің бірегейлігі / құндылығы. Бұл зерттеудің практикалық маңызы зор, яғни оның нәтижелері Қазақстан жағдайында туристік секторды қолдау үшін және пандемия кезінде ұлттық бренд стратегиясын жасауға арналған іс-қимыл жоспарын құруға пайдалы болуы мүмкін. Зерттеуге екі ел: Қазақстан мен Ұлыбританияның қалпына келтіру үдерісіне қатысты әрекеттерді салыстырмалы талдау арқылы COVID-19 індетінің экономикаға әсері туралы қайталама деректерді талдау кіреді. Осы деректерді талдау негізінде туризмді қалпына келтірудің ең қолайлы қадамдары ұсынылды.

Зерттеу нәтижелері көрсеткендей, қысқа мерзімде ұлттық экономикалар үшін халықаралық туризмнен гөрі ішкі туризмге басымдық беру орынды болуы мүмкін. Сонымен қатар, орта мерзімді және ұзақ мерзімді жоспарлар тұрғысынан алғанда, Қазақстан үшін туризмді қалпына келтіру, мысалы мәдени мұра объектілері мен ұйымдарын қолдау схемасы сияқты жоспар бойынша іс-қимылдар жасау үшін халықаралық тәжірибеден сабақ алған маңызды.

Ғылыми жұмыстың туризм секторын қолдау жөніндегі іс-қимыл жоспары (немесе анықтамалығы) ретінде жазылуы оның практикалық маңызы болып табылады. Шектеу мәселесіне келсек, қазіргі кезде академиялық әдебиеттерде жарияланған сенімді мәліметтер жеткіліксіз болғандықтан, бұл мақала қосымша деректерге негізделген. Зерттеу нәтижелері ғалымдарға келешекте терең зерттеулер жүргізуге көмектеседі деп күтілуде.

Түйін сөздер: ұлттық брендинг, инвестициялар, цифрландыру, туризм, стратегиялық маркетинг.

АНАЛИЗ МЕРОПРИЯТИЙ ПО ПРЕОДОЛЕНИЮ КРИЗИСА В ТУРИЗМЕ В УСЛОВИЯХ ПАНДЕМИИ: ОПЫТ КАЗАХСТАНА И ВЕЛИКОБРИТАНИИ

А. Нурпейсова^{1*}, Д. Мд. З. Ислам¹

¹Университет КИМЭП, Алматы, Республика Казахстан

АННОТАЦИЯ

Цель исследования – пандемии коронавируса (COVID-19) создало значительную угрозу для мировой экономики, а также для жизни каждого из нас. В данной научной статье исследуется влияние коронавируса на туризм. На основе данного исследования предлагается схема поддержки туристического сектора Казахстана, разработанная на основе стратегий международного опыта (например, Великобритании, Италии, Испании).

Методология. Для достижения вышеупомянутой цели в исследовании применяется метод качественного исследования, который включает в себя углубленный анализ вторичных данных, включая

исследовательские публикации (таких как рецензируемые журналы, отчеты, правительственные порталы, документы конференций, источники новостей / статей) .

Оригинальность / ценность исследования Практическое значение этого исследования состоит в том, что его результаты могут быть полезны для Казахстана для поддержки туристического сектора и создания плана действий для создания стратегии национального бренда в условиях пандемии. Исследование включает в себя анализ вторичных данных о последствиях COVID-19 для экономики посредством сравнительного анализа действий, касающихся процесса восстановления, двух стран: Казахстана и Великобритании. На основании данного анализа данных были представлены наиболее подходящие шаги по восстановлению туризма.

Результаты исследования показывают, что в краткосрочной перспективе для национальных экономик может быть более целесообразным отдавать приоритет внутреннему, а не международному туризму. Кроме того, с точки зрения среднесрочных и долгосрочных планов, важно, чтобы Казахстан извлек уроки из международного опыта, для того чтобы предпринять действия по плану восстановления туризма, например, схему поддержки мест и организаций культурного наследия.

Практическое значение данной научной работы состоит в том, что она написана как план действий (или справочник) для поддержки туристического сектора. Ограничение заключается в том, что данная статья основана на вторичных данных, так как недостаточно надежных данных опубликовано в академической литературе на данный момент. Ожидается, что результаты исследования помогут ученым в проведении будущих углубленных исследований.

Ключевые слова: национальный брендинг, инвестиции, цифровизация, туризм, стратегический маркетинг.

ABOUT THE AUTHORS

Nurpeissova Assem – PhD student, Bang College of Business, KIMEP University, Almaty, Republic of Kazakhstan, e-mail: assem.nurpeissova@kimep.kz*

Dewan Md. Zahurul Islam – PhD, Associate Professor, Bang College of Business, KIMEP University, Almaty, Republic of Kazakhstan, e-mail: mzidewan@kimep.kz

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ҚАЗАҚСТАНДАҒЫ КОРПОРАТИВТІ ӘЛЕУМЕТТІК ЖАУАПкершіліктің дамуы

Ж. К. Алтайбаева¹, Ш. Ш. Хамзина^{2*}, А. К. Балтабаева³

¹Торайғыров университеті, Павлодар, Қазақстан Республикасы

²Инновациялық Еуразия университеті, Павлодар, Қазақстан Республикасы

³Тұран Университеті, Алматы, Қазақстан Республикасы

АҢДАТПА

Зерттеу мақсаты – Қазақстандағы корпоративтік әлеуметтік жауапкершілік моделін айқындау, сондай-ақ оның идеяларын ілгерілетуді талдау негізінде даму мәселелері мен болашағын анықтау.

Әдіснамасы – Қазақстанда корпоративтік әлеуметтік жауапкершіліктің даму үрдісін анықтау үшін: жүйелік, диалектикалық, салыстырмалы, аумақтық-бағалау тәсілдері қолданылды. Әдістердің