

3. There will be growth in the secondary labor market and decline in the primary labor market.
4. There will be an increase in white-collar employment.
5. There will be a decline in physical labor.
6. There will be a decline in long-term and full-time jobs; employees will produce more than one job, including among professionals chasing the so-called "portfolio" career and growth "temporary" management.
7. There will be a decline in job security.
8. Technological changes and economic pressures are causing work to be reallocated and reorganized, as evidenced by outsourcing to other countries such as India to handle large amounts of routine information and call center work for many overseas hotels.

Based on the above, we can conclude that the system of change management and human resource development in the hotel and restaurant industry is in high demand, primarily so that the hotel can compete with competitors, as the service industry is very vulnerable to competition. Most guests are attracted to hotels with a good range of services.

For example, in the past, customers could rely on classification systems or brands for the "promise" of quality. Today, social media has become part of the business environment. Sites like TripAdvisor play a meaningful role in customer behavior. A report published on Ehotelier.com stated that 90% of guests use one or more social networks during their searches or purchases. While brands play a critical role, they are faced with providing their "promise" on social media. In addition, while hospitality operators have been working with basic forms of "revenue management" for years, the adoption and evolution of computer-based revenue management systems in the hospitality industry has led to the need for new skills and, in many cases, modified organizational structures.

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### **WAYS OF CONFRONTING CONTEMPORARY THREATS OF THE TOURISM INDUSTRY IN A PANDEMIC**

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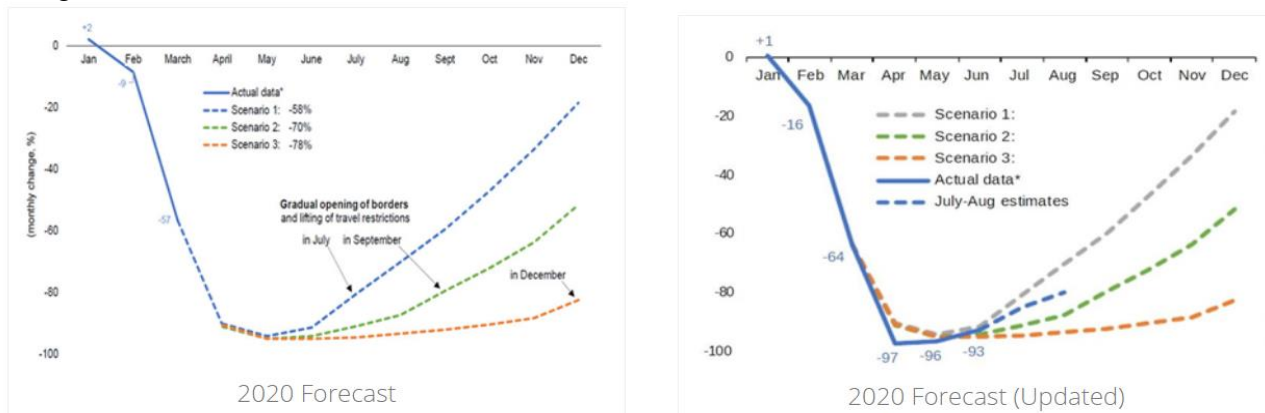
The tourism industry has grown rapidly and has become one of the fastest growing sectors of the economy worldwide. Over the past ten years, the number of international tourist arrivals, up from 880 million in 2009, has grown by 59% from 1.5 billion in 2019. This sector is a key driver of socio-economic progress as tourism destinations develop in an increasing number of national and international destinations.

Globally, the tourism industry contributed \$ 8.9 trillion to global GDP in 2019, or 10.3%. It should also be noted that one in ten jobs in the world is related to tourism, providing 330 million jobs.

However, strong historical growth was halted in 2020 amid the global Covid-19 pandemic. Since the discovery of the contagious virus, flights have been suspended, hotels closed and travel and trips restrictions imposed, making the tourism sector the worst hit.

After the pandemic spread in the first two quarters of 2020, at least 93 percent of the world's population lived in countries with coronavirus-related travel restrictions, with an estimated 3 billion people living in countries that forcibly closed borders to foreigners.

In March 2020, UNWTO proposed 3 scenarios for a possible reduction in the number of arrivals from 58% to 78% for 2020, depending on the starting point of the gradual opening of borders and lifting of travel restrictions.



<sup>1</sup>Illustration: scenarios for a possible reduction in the number of arrivals (Mohamed Aref)

According to UNWTO's March forecast and September update, the industry could recover in 2021 and domestic demand is expected to recover faster than international demand. In May 2020, most UNWTO tourism experts expect to see signs of recovery by the last quarter of 2020, but mostly in 2021.

Soon UN report "COVID-19 and Tourism Transformation" presented five priority areas for tourism transformation in the aftermath of the COVID-19 pandemic:

1. Mitigation of socio-economic impact – preserving jobs, building confidence and security;
2. Increasing competitiveness and sustainability – developing tourism infrastructure and improving the quality of services provided, diversifying products and markets, promoting domestic tourism;
3. Digitalization – digitalization of the tourism ecosystem, creation of innovative solutions, investment in digital skills;
4. Greening – promoting sustainable development, development of ecotourism;
5. Coordination and partnerships to transform the sector and achieve sustainable development goals.

As of July 2020, the EU has opened borders to tourists from 15 different countries. Health officials have developed a plan to classify adopted countries based on how the country is performing safety controls. If the number of new cases of coronavirus in the last 14 days per 100,000 inhabitants is close to or below the EU average, then tourists could travel.

On June 15, the European Commission launched the “Re-open EU” web platform, which provides basic information to safely restore free movement and tourism in Europe. The platform provides real-time data on borders, available transport, restrictions, public health and security measures.

The World Travel & Tourism Council (WTTC), representing the private travel and tourism sector, created the Safe Travel Seal to allow travelers to recognize governments and companies around the world that have adopted globally standardized health and hygiene protocols so that consumers can experience “safe travel”.

Eligible organizations such as hotels, restaurants, airlines, cruise lines, tour operators, attractions and other organizations will be able to use the stamp once they have implemented the health and hygiene protocols set out by the WTTC. As of September 2020, the Safe Travel List includes 100 destinations, with Saudi Arabia, Spain, Portugal and Mexico among the first to adopt the stamp and the Philippines to become 100 destinations.

The governments of the countries are trying to provide the industry with financial support directly and using soft loans and guarantees. Thailand has allocated \$ 700 million to develop domestic tourism, and Vanuatu has provided grants to small and medium-sized enterprises. Companies also receive support in adapting their business models and retraining staff. In Jamaica, the government has run free online training courses for 10,000 tourism workers.

Many countries dependent on tourism face limited financial resources. Perhaps new initiatives to revitalize the sector will help. In Costa Rica, national holidays have been temporarily moved to Monday to stimulate domestic tourism by extending the weekend. Barbados has introduced the "Welcome Stamp" visa, a one-year residence permit that allows remote employees to live and work out of the country. Likewise, Fiji has launched the Blue Lanes initiative, which allows yachts to dock in its marinas after complying with strict quarantine and testing requirements.

Growing in popularity, ecotourism, a fast-growing environmentally friendly and job-creating industry, has given further impetus. In countries with a more stable security situation, local travel agencies organize trips to new and once unpopular areas of nature, which have begun to be in demand among the population.

The current crisis has exposed long-standing structural weaknesses in the tourism economy: it is a fragmented sector, mainly represented by small and medium-sized businesses, overly dependent on seasonality, as well as gaps in the readiness of governments and businesses to respond quickly to new challenges and changes, experts say. If the decline in travel is prolonged due to changes in travel preferences or economic trauma, some tourism-dependent countries may have to take a long and arduous journey to diversify their economies. Investing in non-tourism sectors is a long-term goal, but can be facilitated by strengthening links between tourism and local agriculture, manufacturing and entertainment. Exports, including services, could also be expanded using regional agreements to remove the constraints imposed by limited economies of scale.

Industry leaders are using the crisis as an opportunity for further inclusive and sustainable sector growth. Most countries focused on the development of the tourism sector, and the industry players themselves, took advantage of the crisis lull to accelerate the reboot of the industry, digitalize, launch digital platforms, green solutions and change approaches to organizing tourism.

The Welcome City Lab platform, together with the French Tourism Agency Atout France, this year prepared a special document listing the main innovative development directions in the tourism sector. It identifies five trends in the development of the industry, taking into account the impact of the pandemic. These are care for the health of tourists and compliance with sanitary standards, digital transformation, focus on conscious consumption and Low Tech (production of goods and services with minimal harm to the environment), immersive technologies (combining reality and virtual effects), focus on cities as a center of innovation.

The COVID-19 pandemic has demonstrated that cities can adapt quickly and must better prepare for the future. Urban tourism is one of the main trends of the XXI century.

Cities have indeed responded quite quickly to global changes amid the pandemic. Since the beginning of the spread of the coronavirus, online projects have been launched both to support tourism business and to develop innovative offers and new travel formats. Educational and tourist projects for schoolchildren have moved online; guides in European cities arranged live broadcasts showing attractions for free, maintaining a positive mood among tourists, as well as attracting potentially new ones.

The pandemic-triggered travel restrictions are creating colossal pent-up demand. When the situation is completely normalized, the most attractive will be the one with the best deals and the best infrastructure, including digital. In recent months, people around the world have become accustomed to a new level of digital comfort. Their demands have increased. To be competitive, we need to adapt. It is important to develop and support technological projects in the tourism industry.

The digitalization of the tourism sector began long before the pandemic. Services such as Skyscanner, Booking.com, Airbnb made it easy for tourists to plan their trips on their own, more and more people preferred individual tours instead of package tours. In 2019, Research firm Market Research Future predicted an online tourism market growth of over 13% per year over the next four

years. However, in reality, during the period of post-like recovery, the numbers may be higher and digitalization in the hospitality industry will cover the development of 10-15 years in a short time.

The COVID-19 pandemic has forced the tourism sector to shift its focus to resilience, a relationship between the various stakeholders in the sector. The UNWTO Strategic Guide for Responsible Tourism Sector Recovery identifies six areas for action: public health, social inclusion, biodiversity conservation, climate action, circular economy, governance and finance. The diversity of these themes illustrates a major trend in the sector: the recognition of the necessary coherence and cooperation between representatives of different social and economic sectors related to tourism.

The cross-cutting nature of the tourism sector means that sustainability trends present in any relevant industry can and should be applied to tourism.

For example, global trends in clean energy, green buildings and sustainable waste management are also reflected in tourism. At the same time, consumer demand for sustainable tourism practices is inevitably growing, prompting the sector to respond. However, research shows that consumer behavior is still difficult to predict when it comes to tourism, and the industry should definitely work to improve this situation in the coming years.

As mentioned earlier, the demand will be from those who have adapted and developed. Tourism related transport is a particularly important area for the tourism sector. This is not an easy task, but it can provide an excellent opportunity for those developing low-carbon tourism and green infrastructure practices.

There is no doubt that this pandemic has had many negative impacts on the hospitality sector. Ensuring the safety of employees and tourists is undoubtedly the highest priority. Making some timely changes to existing business policies is also vital, such as flexible cancellation policies, flexible rates for all services, enforcing a strict hygiene policy should be some of the key areas of concern. Email marketing practices, the use of digital resource platforms with social media profiles provide any individual or business user with knowledge sharing and collaboration with relevant local and global stakeholders.

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### **THE IMPACT OF PANDEMIC ON THE TOURISM INDUSTRY IN KAZAKHSTAN**

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In the past decades, tourism has experienced continued growth and became one of the fastest growing economic sectors globally. The sector witnessed a 59% growth over the decade in international tourists' arrivals from 1.5 billion 2019 compared to 880 million in 2009. Tourism is also