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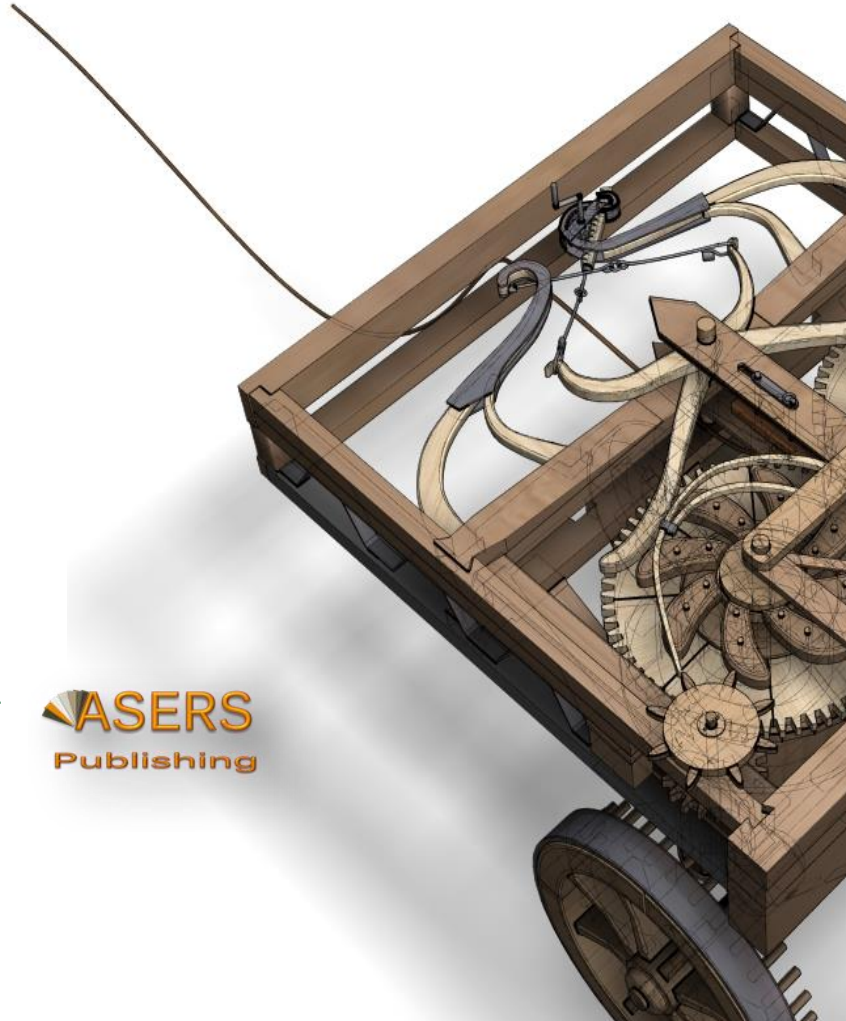
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Journal of Environmental Management and Tourism is an interdisciplinary research journal, aimed to publish articles and original research papers that should contribute to the development of both experimental and theoretical nature in the field of Environmental Management and Tourism Sciences.

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Financial and Administrative Measures for the Development of Tourism after COVID-19

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Abstract:

The recent decades demonstrate that tourism is one of the sectors that develop the most consistently and form the backbone of the economies of many developed and developing countries. In this context, one of the main problems hindering the promotion of tourism services is the relatively high probability of force majeure situations. Whereas forced flight cancellations, floods, or hurricanes are local events, the consequences of the COVID-19 pandemic have taken their toll on the entire tourism sector. Today, the tourism sector is one of the most affected by the COVID-19 pandemic. This may provoke further regression given the weak global economy, geopolitical, social, and trade tensions, and uneven performance among major outbound travel markets. At the same time, over many years, tourism has been consistently proving its resilience and ability not only to recover from economic crises but also to contribute to a broader economic and social recovery. The goal of the present study is to develop proposals for the introduction of financial and administrative measures for the development of the tourism industry in the post-pandemic period. Data for the study are collected by means of document analysis and an expert survey. The study concludes that in order to overcome the adverse economic effects of the COVID-19 pandemic in the sphere of tourism, a number of financial and administrative measures need to be developed and implemented at the level of state and local government institutions, particularly in Kazakhstan, to support the development of the tourism sector and stimulate the activities of tourism enterprise. For their part, the authors propose the key measures that should improve the financial sustainability and organization of the tourism sector in Kazakhstan.

Keywords: tourism; tourism industry; COVID-19 pandemic; domestic tourism; financial measures; administrative measures.

JEL Classification: L83; M10; M21.

Introduction

The tourism industry has suffered great losses because of the COVID-19 pandemic, which has become the most serious challenge of 2020-2021 (Zhilenko *et al.* 2021, 1236) and continues not only to impair tourism but also generally exacerbate the economic and social crisis around the world (Kozhamzharova *et al.* 2022, 427; Rogulenko *et al.* 2021, 171; Setyadi 2021). According to the United Nations World Tourism Organization, international tourism revenues are tentatively estimated to reach \$700 billion to \$800 billion in 2021, which is slightly above the 2020 figures, but less than half of the \$1.7 trillion reported in 2019. The economic contribution of tourism is estimated at \$1.9 trillion in 2021, well below the pre-pandemic value of \$3.5 trillion (Bayih and Singh 2020; UNWTO 2021).

As reported by D.A. Fennell (2020), in 2019, 330 million people were employed in tourism, the contribution of this sphere to GDP reached 8.9 trillion dollars, and its share in world exports of services was about 28%. Global estimates of job losses in tourism and travel for 2020 amount to about 197.5 million people, and the decline in the industry's contribution to global GDP is estimated to be as high as \$5.543 trillion (Ioannides and Gyimóthy 2020, 624). In general, tourism is the third-largest export industry in the world economy (Hall *et al.* 2020, 577).

M. Sigala (2020) suggests that such a factor as the COVID-19 pandemic can paralyze the world tourism market for an indefinite period of time. Furthermore, as indicated by M. Raza *et al.* (2021), the number of international tourists in 2020 decreased by 56%, resulting in a loss of \$730 billion in exports from international tourism. Most experts (Bakar and Rosbi 2020, 189; Baum and Hai 2020, 2397) expect the pre-pandemic levels of 2019 to be reached no sooner than in 2023. Researchers also note (Sun *et al.* 2022) that some areas of the world's tourism sector will fall into a crisis.

Anti-epidemic measures taken to counter the spread of the coronavirus have severely restricted the movement of people even within their countries of residence, let alone international travel. With the initiation of quarantine measures, travel restrictions due to COVID-19 were in effect in most countries of the world. By June 1, 2020, 156 governments completely closed their borders to international tourism. This caused a sharp downturn in income in the field of tourism, both inbound and domestic. As a consequence of the coronavirus pandemic, the flow of tourists worldwide dropped by 65%. In the first eight months of 2020, the number of international arrivals went down by 70%. These events resulted in a loss of \$730 billion, with more than 120 million jobs at risk (United Nations 2020). Moreover, in 2021, international tourist arrivals remained 70-75% below the level of 2019, which indicates a decline, same as in 2020 (Kozhamzharova *et al.* 2022, 427).

Specifically, in 2021, many destinations saw a sharp decrease in travelers compared to 2019: -95% for Asia-Pacific, -82% for the Middle East, -77% for Europe and Africa, and -68% for the Americas. Major tourist destinations are still trying to return to pre-crisis levels. For instance, Spain, which was the second-largest tourist destination in the world prior to the crisis with more than 83 million tourists in 2019, received only 15 million tourists in the first 8 months of 2021, which represents a 4.2% decrease. In 2021, the number of nights spent in EU tourist establishments was 1.8 billion, 27% more than in 2020, but 37% less than in 2019.

Overall, the share of the travel sector in world GDP dropped from 10.3% in 2019 to 5.3% in 2020 due to continued restrictions on mobility and climbed to 6.1% in 2021. After a decline in the expenditures of domestic (by 47.4%) and foreign (69.7%) tourists in 2020, in 2021, there is an increase of 31.4% and 3.8%, respectively (Kozhamzharova *et al.* 2022, 427).

COVID-19 and the introduction of anti-epidemic measures by the world's countries accelerated the transformation of world tourism associated with the increasing importance of travel safety issues, indicators of the sanitary and epidemiological situation in the regions, and the need for tourist enterprises and travelers to stay in the safe zone. The above, in turn, suggests that participants in the tourism market must have a high degree of awareness of current risks and ongoing preventive measures (Kiseleva *et al.* 2022, 44; Zainullina *et al.* 2022, 28). Nevertheless, the above-described situation has allowed creating a stable tourism economy, develop new tourism products, and direct significant efforts of state institutions to the development and support of domestic tourism, which calls for specific financial and administrative measures to address the current problems of the tourism industry (Kabanova *et al.* 2021, 2148; Sokolova *et al.* 2021, 2121).

1. Literature Review

The development of the tourism industry is the subject of numerous studies. In particular, C. Skanavis and M. Sakellari (2011) and C. Thrane and E. Farstad (2011) analyze the varieties of the world tourism market and the mechanisms of its regulation; H. Choo (2015) gives substantiation for the importance and influence of the

institutional environment on the tourism industry; G. Dubois (2005) identifies promising directions and challenges of our time in the field of tourism, and so on.

However, changes in the global economy caused by the pandemic have brought about the need for qualitatively new research into the tourism industry. In today's pandemic conditions, the view on the further development of the tourism industry requires in-depth analysis, and only on its basis can the future development strategy be established. In particular, of note are the researchers who have analyzed the impact of the pandemic on tourism and proposed their own hypotheses for further development of the tourism sector (Assaf and Scuderi 2020, 731; Chebli and Ben Said 2020, 196).

The recovery of the tourism industry in a post-pandemic society is tremendously important. A study by N. Khazami, Z. Lakner, and A. Nefzi (2020) reports the results of a survey of tourism businesses indicating small businesses appear particularly vulnerable to the pandemic and, accordingly, need targeted government assistance and support. F. Higgins-Desbiolles *et al.* (2019) investigate the issues of running a tourism business after COVID-19 and how the tourism industry has transformed after the pandemic, in particular outlining a marketing approach out of the crisis. S. Gössling, D. Scott, and C.M. Hall (2021) identify the factors that promote and diminish the negative impact of crisis events on tourism and those that contribute to the industry's recovery.

Y. Hong *et al.* (2020) suggest that the recovery of domestic tourism will contribute to the economic performance of countries, although domestic tourism is not powerful enough to promote recovery in areas that heavily rely on inbound tourism. For example, there is a great demand for rural tourism in Macau, but this does not compensate for the drop in demand from mainland China (Hoque *et al.* 2020, 52). In the US, where domestic spending accounts for 85% of travel spending, the COVID-19 pandemic has significantly impaired domestic travel demand, thereby affecting tax revenues (Bayih and Singh 2020; UNWTO 2021).

Meanwhile, the issues related to the implementation of financial and administrative measures aimed at raising the significance of the security of travel and the need of tourists and tourist enterprises for epidemiological safety in post-pandemic conditions currently remain little explored.

Thus, the analysis of the materials and concepts presented in the scientific literature has given the opportunity to comprehensively assess the problems of the development of the tourism business and to conclude on the need for a number of financial and administrative measures aimed at overcoming the crisis caused by COVID-19. The outlined issue, therefore, calls for a separate study involving a pool of experts.

The hypothesis put forward in the study states that in order to overcome the adverse economic consequences of the COVID-19 pandemic for the tourism industry, a number of financial and administrative measures need to be developed and implemented at the level of state and local institutions to improve the epidemiological safety of travel, support the development of the domestic tourism sector, and stimulate the activity of tourist enterprises in the field of recreation and sanatorium and resort services.

The primary goal of the paper is to analyze and summarize the necessary financial and administrative measures for the development of tourism in the post-pandemic period.

2. Methods

The research objectives are solved using general scientific research methods: a) theoretical – analysis of peer-reviewed scientific sources and industrial analytics on the problem of tourism development, especially in the COVID-19 pandemic and after the removal of the associated restrictions; b) empirical – an expert survey.

The study was conducted in three stages from January to March of 2022.

At the first stage, the available scientific works and analytical sources on the studied problem were examined. The second stage of the study involved conversations with experts held online. The survey of experts was administered via e-mail and conducted either in Russian or Kazakh at the request of the expert. As part of the survey, e-mails with the question "What financial and administrative measures, in your opinion, are necessary for the development of tourism after COVID-19?" were sent to 65 experts. Out of the total sample of experts, 35 respondents were employees of travel companies from the cities of Nur-Sultan and Almaty and 30 people were employees of regional departments responsible for the development of tourism in four regions of the Republic of Kazakhstan (Almaty, Akmola, Mangistau, Karaganda). In the letter, the experts were asked to justify their answers in free form. Responses were collected from 54 experts.

At the third stage of the study, the financial and administrative measures most frequently mentioned by the surveyed experts were selected. The same experts were then sent another e-mail asking them to select five of the most important measures in each category (financial and administrative measures) and rank them on a scale from 1 (the least important) to 5 (the most important).

All participants in the survey were informed about the purpose of the study and the researchers' intent to publish the results in a summarized form.

3. Results

The experts propose the following financial measures to mitigate the effects of recovery from COVID-19 and ensure the development of tourism after the pandemic (Table 1).

Table 1. Financial measures for the development of tourism after COVID-19

Financial measures	Total sample N = 54	Sphere of activity		Rank
		Tourism N = 29	Public administration N = 25	
financing the costs associated with the improvement of the sanitary and epidemiological safety of the tourist sector from special funds of Kazakhstan's state budget	4.27	4.13	4.38	1
increasing state budget expenditures for the development of sanatorium and resort services enterprises	4.21	4.88	3.94	2
provision of a tax incentive (compensation of personal income tax) for domestic tourists and the users of sanatorium and resort services	2.48	2.63	2.32	6
temporary introduction of tax vacations for tourism companies that kept their employees and paid wages on time under the pandemic restrictions	3.69	3.55	3.88	3
support of a temporary suspension of payments on loan agreements, under which the subjects of tourist activity are debtors, by the National Bank of Kazakhstan	3.43	3.98	3.12	4
restructuring of payments and the provision of preferential lending to enterprises of sanatorium and resort services by private banks	3.37	3.65	3.21	5

Important administrative measures pointed out by the experts include the following (Table 2).

Table 2. Administrative measures for the development of tourism after COVID-19

Administrative measures	Total sample N = 54	Sphere of activity		Rank
		Tourism N = 29	Public administration N = 25	
consultations with participants in the tourism services market on current risks and ongoing preventive measures	2.24	2.33	2.18	6
preparation of regional strategies for regions attractive for domestic tourism to stimulate the development of tourism and the provision of sanatorium and resort services in post-quarantine conditions	3.26	3.01	3.74	4
introduction of a mechanism for monitoring the implementation of support measures for small and medium-sized businesses and tourism industry workers	3.44	3.25	3.76	3
adoption of a transparent mechanism for the use of funds received in local budgets from the tourist tax exclusively for the development of domestic tourism and related infrastructure and improvement of the sanitary-epidemiological situation in the region	4.23	4.64	4.17	1
development and implementation of programs for the digitalization of tourism with respect to improving the epidemiological safety of travel	3.46	3.62	3.24	2
reinforcement of coordination and partnerships between public authorities and participants in the tourism sector with respect to improving the epidemiological safety of travel	3.15	2.88	3.48	5

4. Discussion

The results of the study demonstrate that COVID-19 has revealed the immense importance of the need of the tourism sector to be able to promptly adapt to changes. The key measures required for the development of tourism after COVID-19 involve financial and administrative support for the subjects of tourism and the representatives of small and medium businesses at all stages of recovery from the crisis. This support is to be aimed at raising the importance of the security of travel and satisfying the needs of tourists and tourism enterprises in epidemiological safety, preservation of jobs, and the development of domestic tourism and related infrastructure.

Thus, the development of the tourism industry after COVID-19 requires Kazakhstan to implement programs to support the tourism sector, increase the safety of travel, and meet the needs of tourist enterprises and tourists themselves in epidemiological safety and the preservation of jobs in the tourism sector.

N.A. Bakar and S.B. Rosbi (2020) add to the above quite clear and understandable tourism statistics that have to serve as a basis for strategic decisions made by both entrepreneurs and public authorities. The development and implementation of support programs have to rely on the principles of solidarity, competitiveness, the preservation of employment and income, and the involvement of social partners (Bayev *et al.* 2022, 338; Hall *et al.* 2020, 577).

In our view, drawing on the theoretical analysis of the research problem and the results of the expert survey, the strategy for the development of tourism in Kazakhstan in the post-COVID period should include the following financial and administrative measures:

1. State support has to consider past experience of recovery from crises to create a stronger, more resilient tourism industry in the future. The recent crisis has highlighted the importance of integrated tourism policy approaches to support recovery. Prompt and efficient provision of targeted and accessible support for tourism enterprises, employees of the tourism sector, and tourists themselves was and remains extremely important (Khazami *et al.* 2020, 89). In this regard, financing for costs associated with the use and maintenance of tourism businesses in the most affected tourist destinations can be provided from special funds in the state budget of Kazakhstan.

2. The speed of adaptation: all levels of the leadership of Kazakhstan, as well as the private sector involved in the tourism industry, need to be ready and able to quickly respond and adapt to potential crises. This necessitates more robust risk assessments and crisis response mechanisms, as well as better coordination at the local, national, and international levels (Sun *et al.* 2022). For this purpose, for those regions of Kazakhstan that are attractive for domestic tourism, options for regional strategies to promote tourism and recreation in times of crisis need to be developed in advance.

3. Cross-country cooperation. Kazakhstan's cooperation with other countries is vastly important for the recovery of tourism, as the actions of one government affect tourists from other countries, as well as the global tourism system. There is a need to develop trans-border cooperation systems, for example, with the bordering regions of the Russian Federation, to restore travel and tourist and business confidence, thereby stimulating demand and accelerating the recovery of the tourism industry. More effective international coordination systems are also needed to respond to future shocks, including political ones (Khazami *et al.* 2020, 89).

4. Limitation of uncertainty. Ensuring the clarity of policy and taking measures to limit uncertainty are essential to support the recovery and development of tourism after COVID-19. In other words, there is a need for a clear new norm that would involve the rules of tourists' behavior in terms of hygiene and safety, new norms of crossing borders, alleviation of tourists' psychological perception of risk, and new norms of tourist infrastructure. Clear communication, established information policy, and explicit epidemiological criteria will be particularly important in places that will face a new need for travel restrictions and containment measures in response to virus outbreaks and changing sanitary situations (Hoque *et al.* 2020, 52).

5. Introduction and development of more sustainable models of tourism – domestic tourism, rural tourism, eco-tourism, local tourism, event tourism, festival tourism, cultural tourism, digital (online) tours, and the like. In this vein, particular attention should be paid to the development of domestic and cross-border eco-tourism in Kazakhstan – activities to encourage tourists to visit the nature reserves, lakes, and alpine meadows of Kazakhstan. Thus, in view of the structural weaknesses in the sphere of tourism and the vulnerability to external upheavals revealed by the pandemic, there is an urgent need to improve the resilience of the tourism economy, better prepare for potential force majeure situations, address existing structural weaknesses, and encourage the transformation that will be needed for Kazakhstan to transition to more sustainable models of tourism development.

Conclusion

The results obtained in the study confirm the hypothesis that in order to overcome the adverse economic consequences of the COVID-19 pandemic for the tourism industry, a number of financial and administrative measures need to be developed and implemented at the level of state and local institutions to improve the epidemiological safety of travel, support the development of the domestic tourism sector, and stimulate the activity of tourist enterprises in the field of recreation and sanatorium and resort services.

The travel and tourism industry, together with the government of Kazakhstan, need to improve their coordination mechanisms to support enterprises in the tourism sector and their employees. Kazakhstan's government has to account for the long-term consequences of the crisis while promoting the structural transformations necessary to create a stronger, more sustainable and resilient tourist economy.

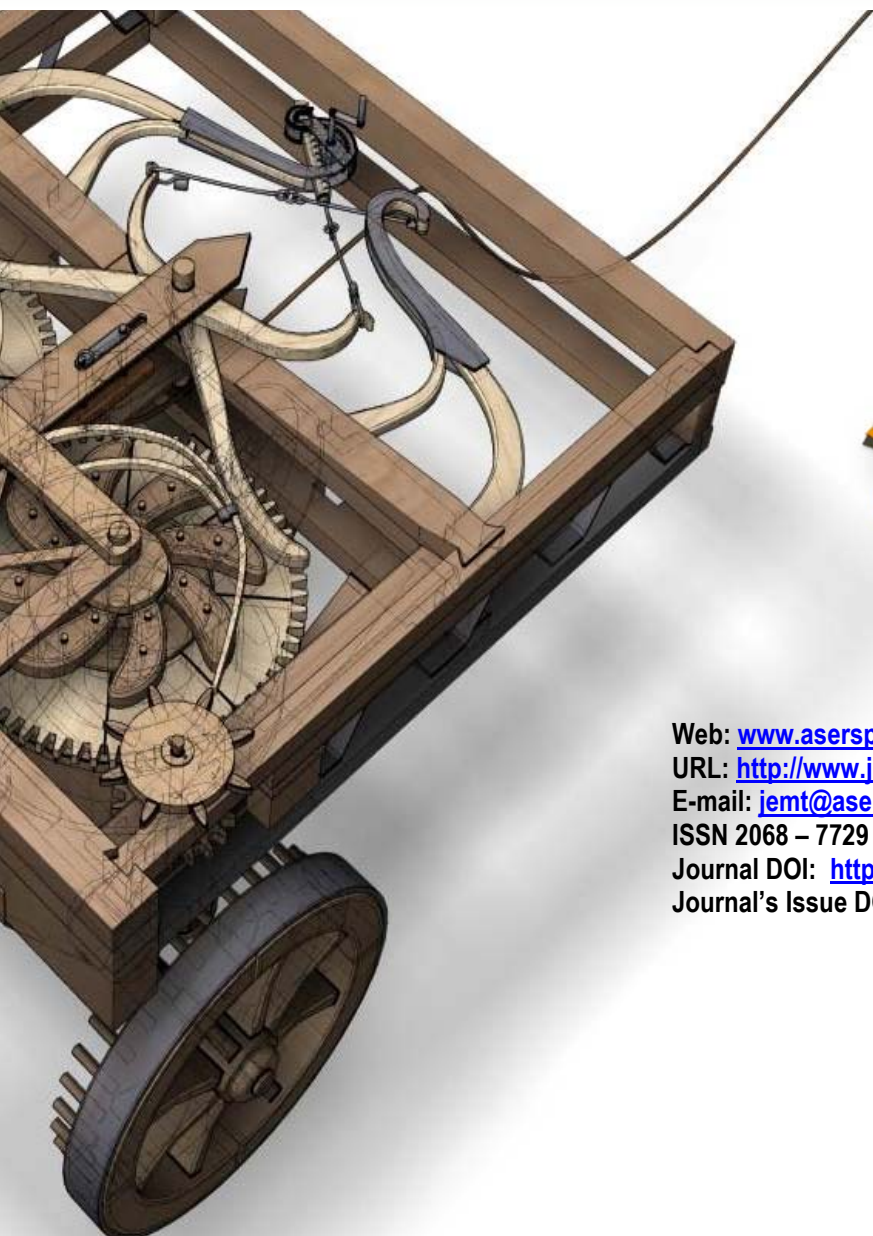
Among the limitations of the study, we can note the insufficient size and limited geographic scope of the expert pool. The prospect of further research could be the development of specific financial and administrative measures on the example of a particular tourist destination in the Republic of Kazakhstan.

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