

L.A. Litvinova-Kulikova¹
Zh.N. Aliyeva²
D.L. Dénes³

^{1,2}Al-Farabi Kazakh National University, Almaty, Kazakhstan
³Szent István University, Győr, Hungary
(E-mail: litvinova_kulikova_l@live.kaznu.kz)

Analysis of the current state of business tourism

Abstract. *Business tourism is one of the most dynamic and economically profitable forms of tourism. Since business tourism has been influenced by external and internal factors, the study aims to analyze business tourism in today's complex and constantly changing environment. The article explores the impact of the COVID-19 Pandemic on business tourism, what other problems exist in the industry, and the prospects for business tourism. The authors analyze the evolution of the concept of business tourism, investigate the structure of business tourism, and reveal modern trends and new forms of business travel, such as pleasure tourism. Statistical analysis of business travel data for 2000-2020 and analysis of the impact of the pandemic on business travel was used to identify modern business tourism issues. To assess the relationship between economic growth and business tourism development was used the correlation and regression method. The results of the study included an assessment of the state of business tourism, a SWOT analysis, the advantages of business tourism in comparison with other types of tourism, the problems of business tourism, and forecasts for the future development of business tourism.*

Keywords: *business tourism, MICE tourism, tourism development, travel market, purposes of visit, business activity, pleasure tourism.*

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Introduction

Business trips have been practiced by people from ancient times. The first travelers sought to find new markets, gain new experiences and skills. As a result of the increase in the number of travelers and revenues, business tourism has been studied more thoroughly. As a separate stream of the tourism industry, business tourism appeared only in the 1980s, when business trips, exhibitions, conferences, etc. were widely developed. And now business tourism is one of the most significant types of tourism. Intensive processes of globalization and integration, active development of business, and scientific ties demand effective interaction. International

conferences, congresses, and exhibitions today are an important part of almost any area of business. In an effort to expand economic ties, share scientific achievements and innovative technologies, expand markets, businessmen travel extensively and participate in various business events. Given the pace of economic growth and its direct impact on the tourism industry, the business tourism market is now a promising area for further development. According to International Tourism Highlights, published by the World Tourism Organization (UNWTO) edition 2020, business trips make up 11% of total travel [1].

The relevance of the topic depends on the ever-increasing economic importance

of business tourism. Business tourism, as a dynamic sector dependent on many external factors, requires continuous monitoring to better assess threats and to rapidly develop responses and development strategies. Ever-changing economic, epidemiological and social conditions require regular analysis of the business tourism market. Conducting a comprehensive study of threats and prospects is becoming relevant and strategically necessary.

The aim of our research is to provide a comprehensive analysis of the current state of business tourism, including the identification of the complexities and prospects of business tourism and the identification of problems hindering the development of business tourism.

In order to analyze the business tourism sphere, first of all, we need to understand what the definition of business tourism is. Different scientists give their own definitions of business tourism: in the early sources, the concept of business tourism is described very briefly and was understood as “a travel related to the performance of professional duties” [2, 3] or “travel for official purposes without income at the place of business trip” [4]. In later sources, we were able to find a more complete and precise definition of the “business tourism” term. In the “Encyclopedia of Tourism” by Igor Zorin and Valeriy Kvartalnov “business tourism” is described as “temporary trips with business purposes, including participation in conferences, congresses, etc. without receiving income at the place of business trip” [5].

With the development of business tourism, it became necessary to divide business tourism into components. Aleksandrova A. in her textbook “International tourism” suggested dividing business trips into corporate trips, which include departures of company employees on the affairs of their company, and non-corporate trips of employees of government structures and industry associations [6].

Today, however, the most common is the division of business tourism on the basis of the purpose of visit. According to the main purpose of travel, the business tourism market could be divided into segments: individual meetings,

participation in congresses and conferences, incentive trips, and visiting exhibitions. In accordance with this division, a special abbreviation “MICE” was formed. MICE is the acronym for Meetings, Incentives, Conferences and congresses, Exhibitions.

So there are many forms of business tourism activities and different definitions of business tourism. This difference makes it difficult to maintain statistics on business arrivals. This is especially important for incentive tours. Incentive tour is “vacation travel arranged by or through an employer and awarded as a motivational bonus to qualifying employees or salespeople” [7]. Despite the fact that the incentive tours are part of business tourism, participants perceive them as vacation and, accordingly, when filling in the arrival forms are marked themselves not as business tourists, but as leisure tourists.

Also, the complexity of statistical accounting represents a new type of tourism, so-called “bleisure tourism”. Bleisure - the industry buzzword for travelers combining business and leisure. This is a new type of tourism that combines business travel and leisure. The modern world dictates its conditions, and the accelerated pace of life forces people to plan their time more seriously. Modern tourists regulate not only the duration of tours but try to spend their time effectively. More than 40% of business trips are extended for leisure purposes [8]. In order to save time and money, people try to combine a business trip with the possibility to relax at the end or between business events. Bleisure tours complicate statistical accounting, as they relate to two types of tourism. In our opinion, bleisure tours are closer to business tourism as their main goal is business. And only secondly, a person is considering the opportunity to relax on a business trip. So bleisure tours should be included in types of business tourism.

Thus, after analyzing domestic and foreign scholars, we can conclude that business tourism is a branch of the tourism industry that includes travel for the purpose of attending congresses, conferences, exhibitions, trade fairs, and similar government and corporate events, individual business trips, incentive tours, and bleisure tours, for work-related purposes (Fig.1).

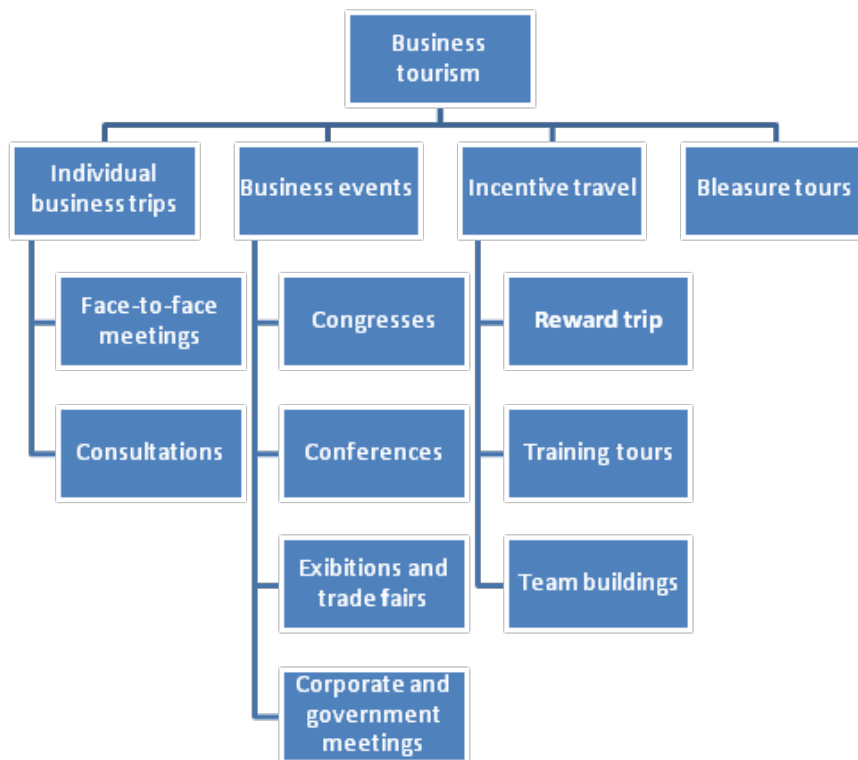


Figure 1 - Structure of the business tourism

Note – Authors’ own elaboration

Methodology

Business tourism requires careful study, identification of development patterns, development prospects, and constraints.

The article contains research on the concept of “business tourism” and its components, analyzing the work of specialists, such as Kwartalnov V.A., Kirilov A.T., Alexandrova A.Yu, Swarbrooke J. & Horner S.

An examination of the statistics for 2000-2020 provided by the World Tourism Organization, the International Congress and Convention Association, the International Association of Professional Organizers of Congress, Statista Research Department, and specialized journals and periodicals, we have carried out quantitative research, studied the recent changes in the tourism industry and analyzed their relationship with economic and epidemiological changes taking place in the world.

To assess the relationship between economic growth and business tourism development was used the correlation and regression methods.

Discussion

Until 2020, tourism, including business travel, grew rapidly, with an annual growth rate of 5-7%. According to UNWTO, tourism is the third-largest export category in the world. Total international tourism exports in 2019 amounted to \$1.7 trillion, up 4% over the previous year. The Asia-Pacific market (+7%) and the European market (+5%) both showed high growth rates. And business trips make up about 13% of total travel [1].

According to the research, business travelers spend three times more money in their host country than vacationers. Business tourism is less dependent on weather conditions, cultural and historical sites, and the availability of recreational resources than other types of tourism.

In countries with the developed tourism industry, domestic tourism contributes to the stable position of the national economy due to the redistribution of national income and the development of activities favorable to the country’s economy as a whole [9]. The creation

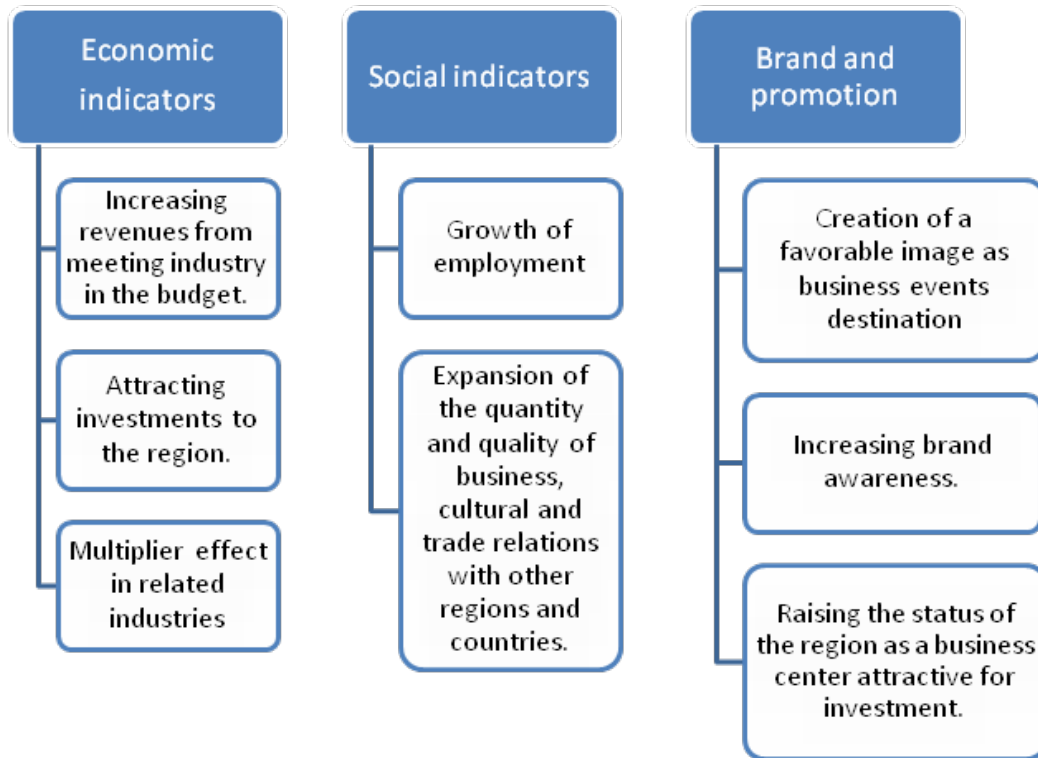


Figure 2 – Benefits from business tourism

Note: Authors' own elaboration based on data identified in the research.

of an effective system for the functioning of the tourism sector leads to positive socio-economic effects: improving the socio-economic situation of the country, forming a developed infrastructure, developing the economy, increasing competitiveness [10].

Thus, tourism stimulates economic growth and many countries try to develop tourism in their region. With a multiplier effect, tourism contributes to the intensive growth of services, transport, construction, agriculture, and handicrafts. Business tourism attracts foreign

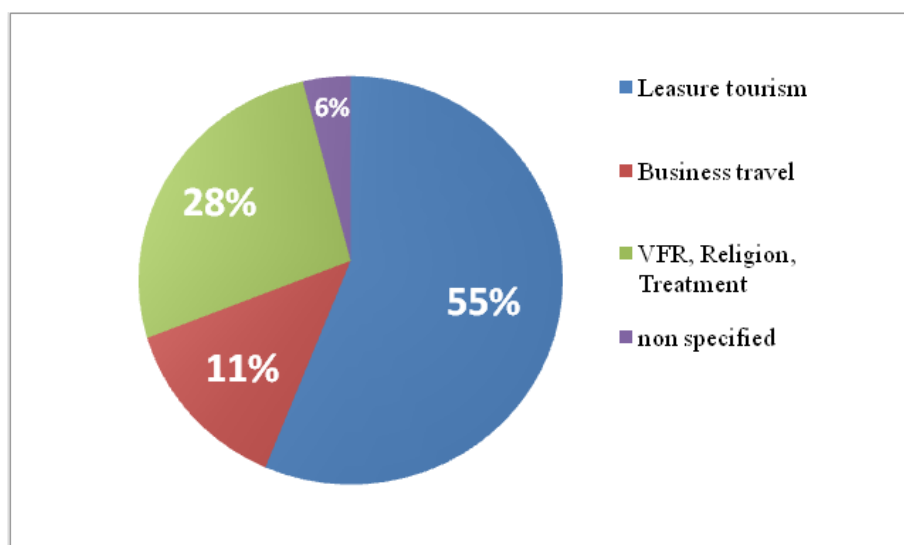


Figure 3 - Segmentation of the market by the purpose of the visit (share in %)

Note - Authors' own elaboration based on sources of the World Tourism Organization (UNWTO) [1]

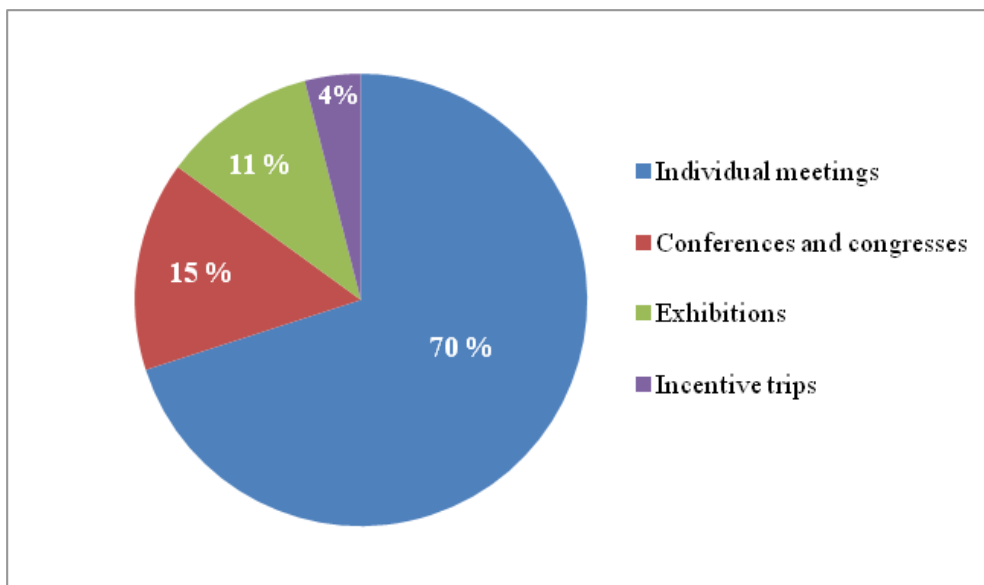


Figure 4 - Market share by type of business tourism (%)

Note - Author's own elaboration based on sources of the International Congress and Conference Association [12]

investment, influences employment growth, and leads to significant economic growth. Many countries, lacking natural resources but seeking to develop tourism, have identified business tourism as a priority.

Business tourism could become an important part of the economy, generating foreign exchange earnings and tax revenues for the country. By improving the investment climate, simplifying visa regulations, improving tax policy, and raising the level of education, the government can significantly improve the conditions for the development of business tourism. By summarizing all the benefits of business tourism identified in the research, it is possible to categorize them (Fig.2).

According to the UNWTO report, there were 1.460 million trips worldwide in 2019, an increase of 5 percent over the previous year. 11% of that number had business purposes. That's over 160 million business tourists (Fig.3).

If we look at tourist arrivals in general, the most popular regions are Europe (51% of all tourist arrivals) and Asia (25% of arrivals), followed by the Americas (15%), Africa (5%), and the Middle East (4%). If business tourism statistics are considered, the situation is different: 45% of the flow goes to Europe (leading destinations

are France, Spain, Germany, Italy), 23% to the Americas (leaders are the USA, Canada, and Mexico), to the Asia-Pacific region 15% (leaders are Singapore, Japan, Hong Kong), to the Middle East 10% (leading countries are the UAE, Saudi Arabia, Israel), to Africa 7% (South Africa, Egypt, Morocco) [1].

Thus, we see that in business tourism, countries with active economic activity are in the greatest demand. The main advantages of these countries are business activity, offices of large international companies, developed transport network, transport hubs, availability of infrastructure for holding of exhibitions, congresses and so on. They also have the potential to use innovative technologies and attract economic investment. All these advantages enable the region to achieve long-term economic and social growth and development [11].

By analyzing the data on business tourist arrivals, we can see that individual meeting prevail in business tourism in the world (Fig.4). It is important to take this into account since every type of business trip requires certain conditions and preferences.

According to a study conducted by the International Association of Congresses and Congresses, the most important factors in

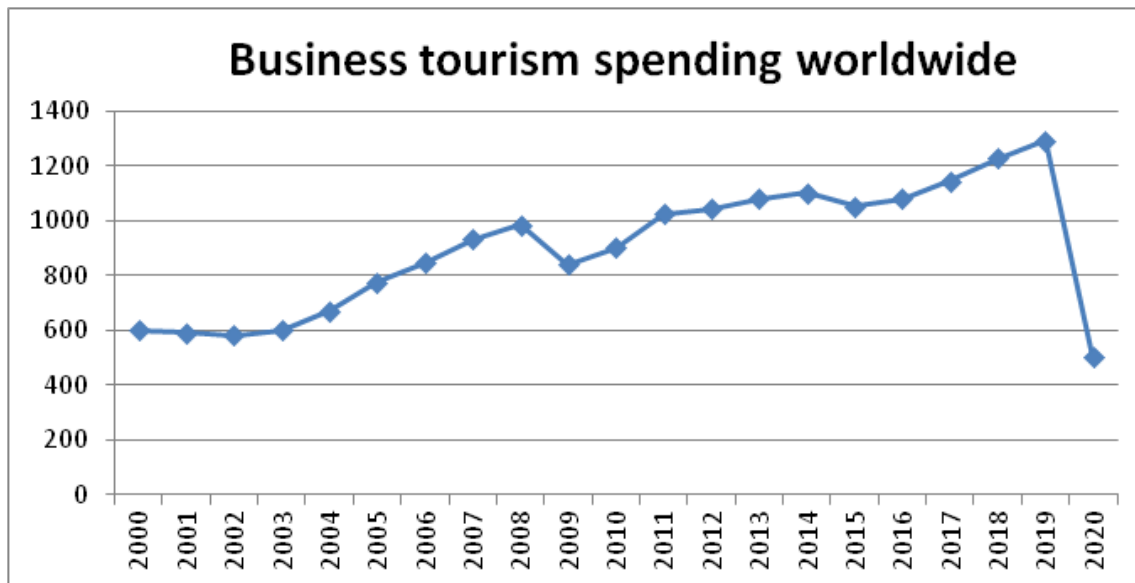


Figure 5 - Business tourism spending worldwide (billion U.S. dollars)

Note - Author's own elaboration based on sources of Statista Research Department [14]

selecting the venue of the conference/congress for companies are the availability of spacious conference rooms, transport accessibility, leisure opportunities, quality of service, and well-developed infrastructure. At exhibitions, an important component is also the developed infrastructure and transport accessibility, as well as diversity in the choice of accommodation and catering, high-quality service, Affordable prices, and social stability. The availability of tourist and recreational resources, climatic conditions, and safety are the most important criteria for incentive tours. [12].

Suitable event venue, destination accessibility, internal transport system, and sufficient attractions are important aspects for a competitive destination [13].

But it is not only infrastructure that affects tourism development. Tourism in general and business tourism, in particular, are very sensitive to the external environment. Any political, climatic, economic, social change has a major impact on tourist arrivals.

Analyzing business tourism spending worldwide from 2000 to 2020 (Fig.5), we can see constant growth, except for 2009, the peak of the economic crisis, and the period of the Covid-19 pandemic in 2020.

The global financial crisis of 2008-2009 was a prime example of a sharp downturn in business travel. Global business travel spending plunged by 15%. This recession has had a disastrous impact on the financial situation of the aviation and tourism sectors.

International tourist arrivals declined by 4.2 % in 2009 to 880 million [16], as a result of the global financial crisis and the economic downturn. The airlines recorded a 40% drop in air traffic. 40 small and medium-sized airlines closed down during that period. Banks refused to lend to the tourism sector as it was low-income and risky. This led to a decline in the numbers of investments in the tourism sector and the bankruptcy of tour operators. The approach to travel has also changed. For economic reasons, face-to-face meetings have been replaced by online negotiations. But business tourism has recovered as economic stability and income growth have returned. After the financial recession, new opportunities have emerged. Companies had to take on a new level and improve their market position, and in order to do so, they had begun to enter the international arena actively, looking for new markets and new partners.

By the end of 2010, there was an increase in business arrivals, and by the following year,

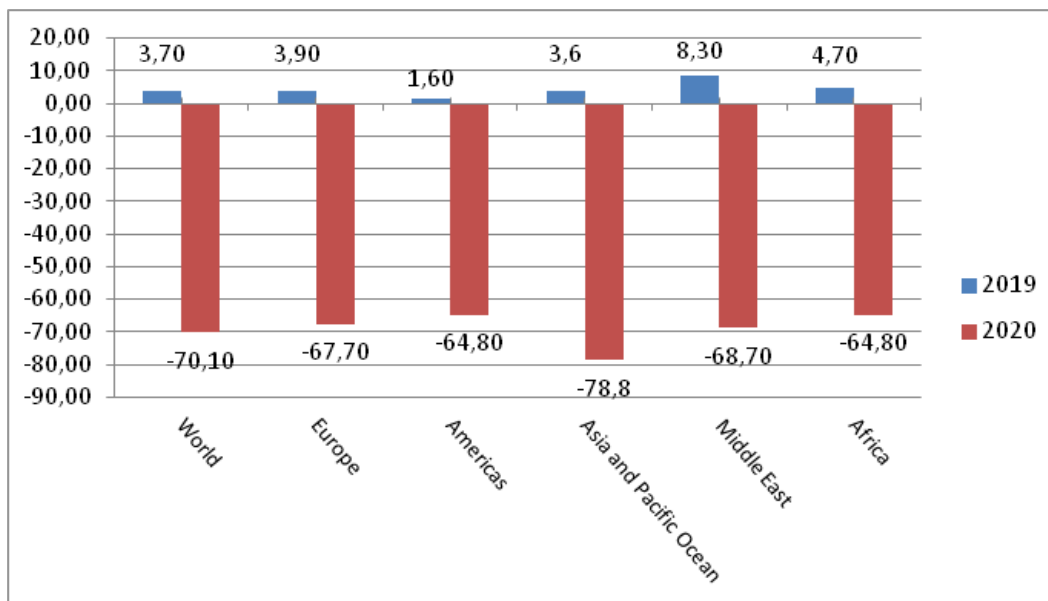


Figure 6 - Change in the number of tourist arrivals (%)

Note - Authors' own elaboration based on sources of the World Tourism Organization (UNWTO) [1]

travel volume had recovered. Business tourism spending increased by 7%, followed by a renewed increase in business arrivals [17].

The global Covid-2019 pandemic in 2020 had an even more serious impact on the business tourism industry, resulting in the cancellation of exhibitions, conferences, conventions and etc.

During the first half of 2020, the business tourism market decreased by 95% [18]. From March to June 2020, air traffic among the countries was almost completely stopped, borders were closed, and international traffic was limited. According to UNWTO, from January to August, export earnings from international tourism fell to \$730

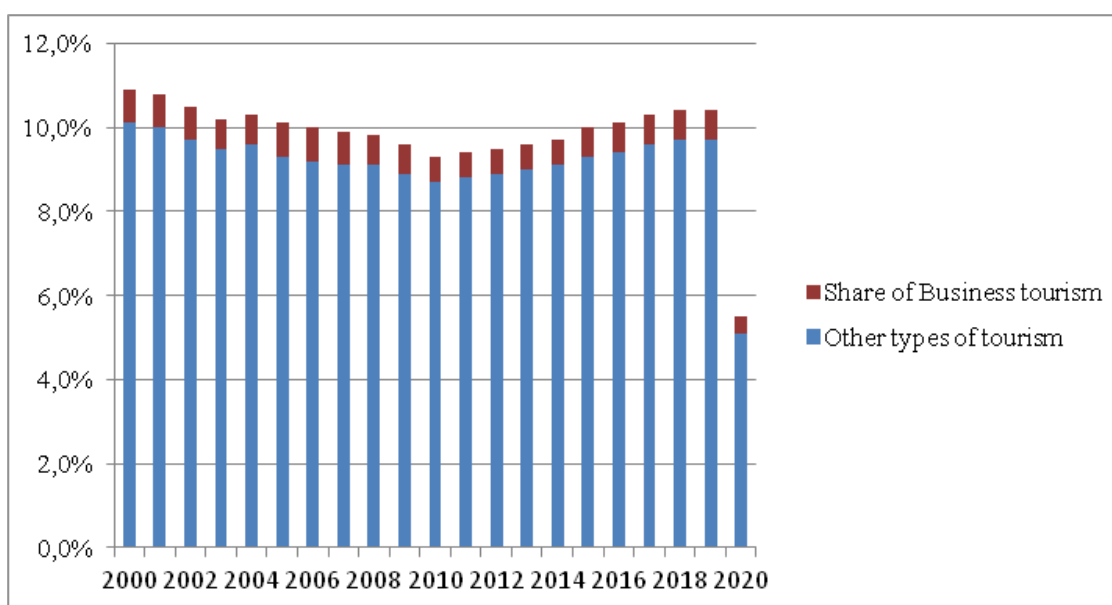


Figure 7 - Share of the total gross domestic product (GDP) generated by the travel and tourism industry and business tourism worldwide from 2000 to 2020

Note - Author's own elaboration based on sources of Statista Research Department [15]

Table 1

GDP and Business tourism spending 2000-2020

	GDP (current trillion US\$)	Business tourism spending worldwide (trillion US\$)
year	x	y
2000	33.704	0.6017
2001	33.49	0.5911
2002	34.763	0.582
2003	38.989	0.5996
2004	43.924	0.6723
2005	47.571	0.7775
2006	51.549	0.8487
2007	58.073	0.932
2008	63.723	0.986
2009	60.443	0.8398
2010	66.165	0.9025
2011	73.494	1.026
2012	75.179	1.045
2013	77.323	1.081
2014	79.448	1.103
2015	75.027	1.054
2016	76.232	1.082
2017	81.112	1.146
2018	86.139	1.228
2019	87.437	1.294
2020	84.578	0.504

Source: World Bank and Statista Research Department [20, 14]

billion compared to the same period in 2019 [1]. This is more than 8 times higher than the losses incurred as a result of the global financial crisis of 2008-2009. Figure 6 most accurately reflects the decline in the tourist market.

Due to the impact of the COVID-19 pandemic, the European Union recorded the total expenditure on business trips reached roughly 114.6 billion U.S. dollars, dropping from 258 billion U.S. dollars in 2019. The United States and Japan followed on the ranking, recording business travel spending of approximately 109.4 and 58.5 billion U.S. dollars, respectively, in 2020 [14].

By analyzing the share of total gross domestic product (GDP) generated by the travel and

tourism industry worldwide from 2000 to 2020, we can see a significant decline in the share of tourism in 2020. In 2020, the share of total GDP generated by the travel and tourism industry accounted for 5.5 percent of world GDP. In 2019, it was 10.4%. The share of business tourism in global GDP has always been in the range of 0.6 to 0.8 percent and also decreased in 2020 to 0.4% (Fig. 7) [15].

Business tourism also depends on the economic situation in the world. The correlation between business tourism spending and GDP worldwide was analyzed by the method of correlation and regression. Two methods for determining and measuring the correlations between the two indicators allow determining

the trend and direction of their addiction. The data used in the study are annual figures from 2000 to 2020, composed of variables in GDP and business travel spending. Data on variables were obtained from the World Bank Economic Survey and Statista Research Department. The descriptive statistics of the data series used in the study are presented in Tab. 1.

Using the correlation coefficient formula below, we determined that the correlation coefficient of missiles is 0.77 ($r = 0.773651$). The correlation analysis shows that business travel spending is very significantly correlated with GDP.

$$r = \frac{n(\sum xy) - (\sum x)(\sum y)}{\sqrt{[n\sum x^2 - (\sum x)^2][n\sum y^2 - (\sum y)^2]}}$$

Regression method requires estimate of regression function parameters, achieved through the method of least squares. On the basis of the years 2000-2020, results of which interpretation is presented in the figure 8 and table 2.

Influence on business travel spending is 59.8%, as confirmed by the coefficient of determination, the remaining 40.2% being other factors. And as can be seen from the correlation coefficient 0.77,

Table 2

Regression Statistic	
Multiple R	0.773650565
R Square	0.598535196
Adjusted R- Square	0.57740547
Standard Error	0.152813007
Observations	21

Note - Author's own elaboration using Excel MS program.

the natural logarithm of tourism growth and financial development is positively correlated. With the growth of GDP, there is a significant increase in business tourism spending, the trends established for the two indicators are almost proportional.

Results

The analysis revealed that business tourism is a dynamic and profitable sector of the world economy and it is constantly changing. Tourist preferences are changing, new forms of travel are emerging, and crises are taking place with

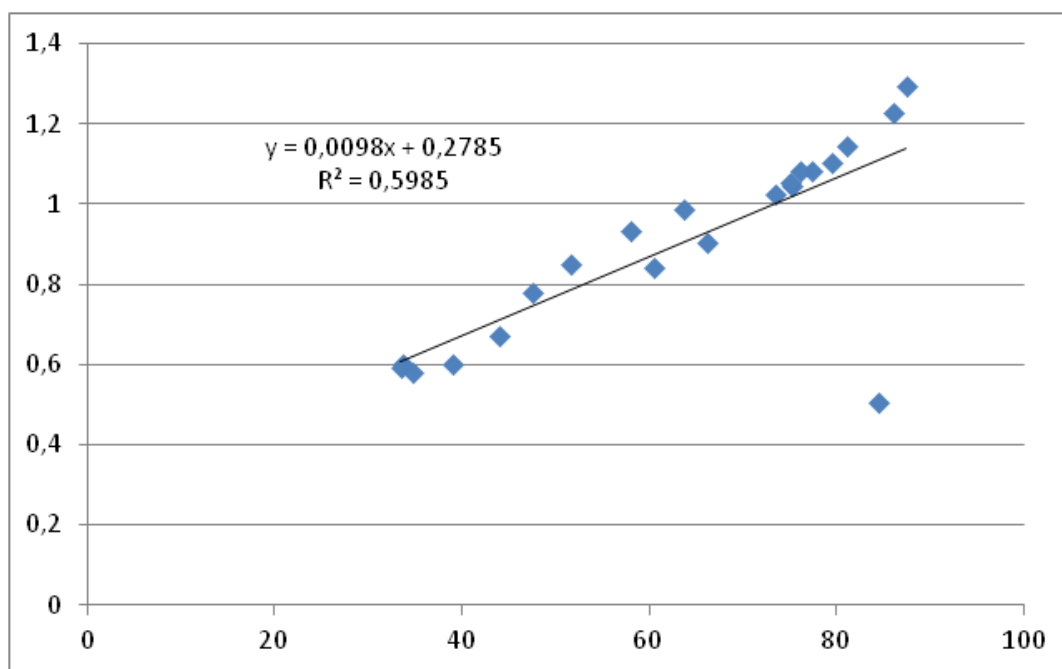


Figure 8 – Correlation and regression analysis

Note - Author's own elaboration using Excel MS program.

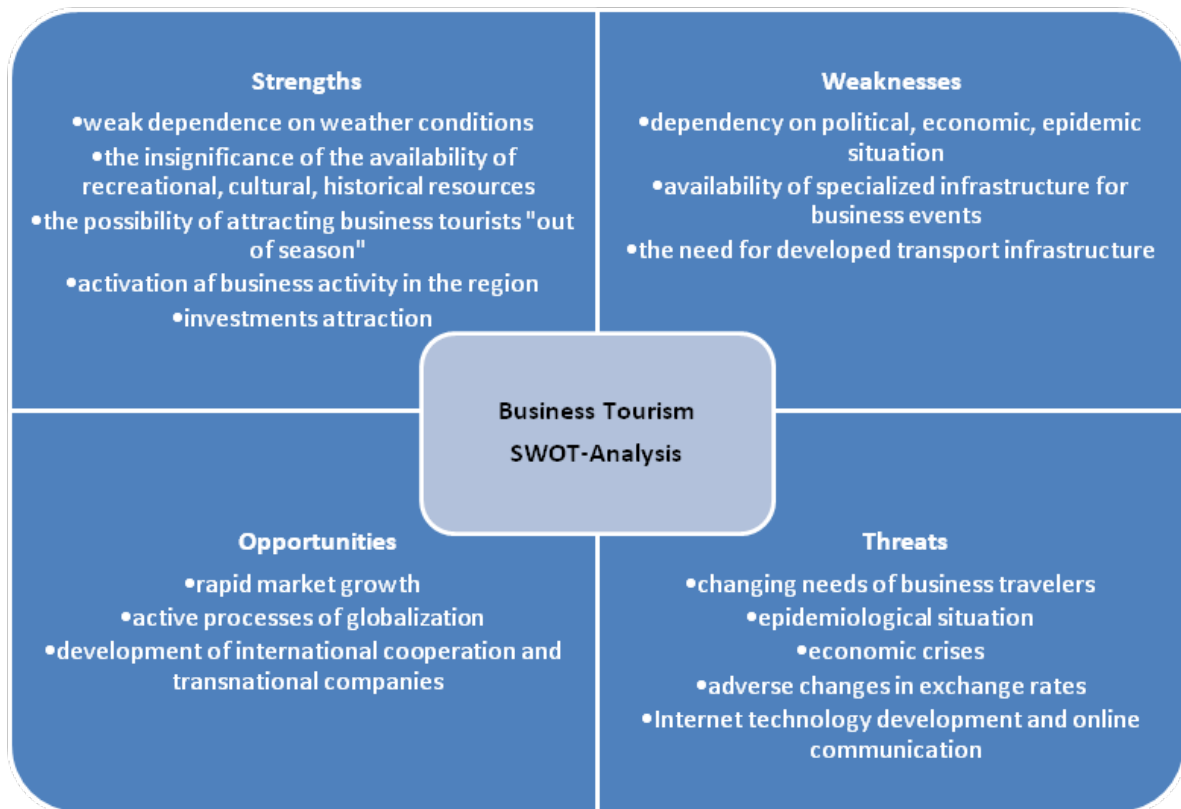


Figure 9 – SWOT-analysis of business travel

Note - Authors' own elaboration.

disastrous effects on the tourism industry. All these problems, together with the difficulties identified in the survey with tax policy, poor infrastructure, training of specialists, and visa requirements, are hampering the development of business tourism.

In modern conditions, the active development of online video communications poses another threat to business tourism. The possibility of high-quality online communication allows you to significantly save time, reduce travel costs and generally increase productivity. The pandemic and restrictions on the movement of people have given a sharp jump in the development of online communication. According to the data in 2020 Zoom had over 300 million meeting participants per day (this compares to 10 million in December 2019), Google Meet had over 100 million daily meeting participants, Microsoft Teams had 75 million active daily users in 2020 [19]. We cannot deny that the COVID-19 pandemic changes the way of working.

Analyzing the existing definitions, we could see how the definition of business tourism has changed over time. Now we offer to define business tourism as a branch of the tourism industry which includes travel for the purpose of attending congresses, conferences, exhibitions, trade fairs, and similar government and corporate events, individual business trips, incentive tours, and pleasure tours, for work-related purposes. In our opinion, such a new kind of travel as pleasure tours should be included in the business tourism sector, as their main purpose is business.

So after analysis of the current state of business tourism, we could reveal its strengths, weaknesses, advantages, and disadvantages, and design a SWOT analysis (Fig. 9). This method illustrates the competitive advantages of business tourism over other forms of tourism and the complexities of its development.

The SWOT analysis shows that business tourism has several advantages over other types of tourism. It is less dependent on natural and

recreational resources, cultural and historical objects. For business tourism, the business activity of the region, the developed transport system, and the openness of the economy to foreign capital are the most important factors. At the same time, business tourism has a number of important advantages. In addition to its direct contribution to the economy, the development of business tourism contributes to the growth of business activity in the region and to the interest from foreign investors. By attracting business tourists, the government stimulates business development, increases the investment attractiveness of the region, and improves the country's tourist brand. Effective management of the business tourism sector can contribute to addressing social issues, in particular, the quantity and quality of jobs created.

Conclusion

Analyzing the current state of business tourism in the world, we see that during recent decades the volume of business travel in the world has steadily increased. But today, since 2020, the market has experienced the largest decline in travel in business tourism history, even in the wake of the 2008-2009 economic crisis. As the area of least dependence on cultural, natural and historical sites, business tourism is directly dependent on economic stability and open borders. The correlation analysis shows that the business travel spending is very significantly correlated with GDP. Today business tourism is almost stagnating. The restrictions caused by the Covid-19 pandemic in 2020 led to a 70% fall in number of tourist arrivals. The gradual lifting of travel restrictions has led to an increase in business travel, but remains low. Most of the exhibitions have been canceled or are held in a manner consistent with the number of visitors. Conferences and congresses are held with limited participation.

According to the "Barometer of World Tourism" by UNWTO, in January 2021 the number of international tourist arrivals was 87% lower than in the same period in 2020. January figures were even worse than those for the first

year of the pandemic (-70 %) [21]. Mandatory testing, quarantine, and, in some cases, full border closures prevented the resumption of international travel in early 2021. In addition, the speed and distribution of vaccinations were lower than expected, which further delayed the resumption of tourism. The global Covid-2019 pandemic in 2020 had a serious impact on the business travel industry, resulting in the cancellation of exhibitions, conferences, conventions and etc. The COVID-19 pandemic recession has been quite different than downturns. Usually, recessions result in service sectors suffering greater declines than manufacturing. The pandemic has greatly affected the behavior of the population and significantly reduced personal communication. Hospitality, restaurants, entertainment, museums, and galleries have been hit hardest by the quarantine.

At the same time, while tourism is returning to some destinations, we could see that business tourism can adapt quickly to changing situations while remaining in demand. As the statistics show, the business tourism sector shows a more robust growth rate among all types of tourism. The number of business travelers recovers more actively than leisure tourists, especially the number of individual business travelers. Thus, despite the existence of weaknesses, the development of business tourism supported by the government and the interest of the business environment is promising and economically profitable. The research showed, after the economic crisis, that business tourism has recovered in two years. The collapse of business tourism due to the Covid-19 pandemic was more catastrophic. But according to UNWTO forecasts, the situation will develop either in an optimistic scenario with a 66 % increase in tours numbers by July (compared to 2020). Or a pessimistic scenario with a growth rate of only 22%. Tourism is expected to recover only if most countries remove travel restrictions and successfully implement vaccination.

Epidemiological and economic conditions are not always effectively controlled, and then the adaptability of business tourism to new conditions entirely depends on the coordinated

work of business and the government. Recovery is slow, as travel restrictions still exist and not all countries have opened borders. But despite all the difficulties, the business tourism market is recovering, albeit slowly. While we see a gradual increase in business tourist arrivals, as the virus remains unresolved and new strains emerge, there are still risks of new travel restrictions and borders shutdowns, lockdowns, or curfews. In addition, the increase in business travel is affected by the deteriorating economic situation and the lack of reliable forecasts.

The survey indicates that the development of business tourism effectively affects the growth of business activity in the region, contributes to the establishment of economic ties, and increases the inflow of investments. Support for business tourism greatly strengthens business linkages in the global economic environment, promotes business development, helps to overcome the negative effects of crisis periods, revives business and affects the economy as a whole. Thus, business tourism can become an effective tool for the economic development of the region.

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Л.А. Литвинова-Куликова¹, Ж.Н. Алиева², Д.Л. Денес³

^{1,2}Қазақстанның ұлттық университеті им. аль-Фараби, Алматы, Қазақстан

³Университет Святого Иштвана, Дьёр, Венгрия

Анализ текущего состояния делового туризма

Аннотация. Деловой туризм - один из самых динамичных и экономически выгодных видов туризма. Поскольку на развитие делового туризма влияют как внешние, так и внутренние факторы, то целью данного исследования являются анализ сферы делового туризма в современной сложной и постоянно меняющейся среде и определение перспектив его развития. В статье исследуется влияние пандемии Covid-19 на деловой туризм, выявляются проблемы, существующие в отрасли делового туризма на данный момент, определяются возможности его дальнейшего развития. Авторы анализируют эволюцию понятия делового туризма и исследуют его структуру, раскрывают современные тенденции и новые формы делового туризма, такие как «bleasure» туры. Для выявления проблем современного делового туризма использовался статистический анализ данных о деловых поездках за 2000-2020 годы, представленных ЮНВТО и отраслевыми ассоциациями, изучены изменения, происходящие в сфере туризма, проанализирована их связь с экономическими и эпидемиологическими изменениями последних лет. Результаты исследования включили оценку современного состояния делового туризма, SWOT-анализ, выявление преимуществ делового туризма по сравнению с другими видами туризма, анализ проблем делового туризма и прогнозы будущего развития делового туризма.

Ключевые слова: деловой туризм, МІСЕ-туризм, развитие туризма, конференции, пандемия и туризм, bleasure туризм (блэже-туризм).

Л.А. Литвинова-Куликова¹, Ж.Н. Алиева², Д.Л. Денес³

^{1,2}Әл-Фараби атындағы Қазақ Ұлттық университеті, Алматы, Қазақстан

³Св.Иштван университеті, Дьёр, Венгрия

Іскерлік туризмнің қазіргі жағдайының талдауы

Аннотация. Іскерлік туризм - бұл туризмнің динамикалық және экономикалық жағынан тиімді түрлерінің бірі. Іскерлік туризмнің дамуына сыртқы және ішкі факторлар әсер ететін болғандықтан, мақаланың мақсаты қазіргі заманғы күрделі және үнемі өзгеріп тұратын ортадағы іскерлік туризм саласын талдау және оның даму перспективаларын анықтау болып табылады. Мақалада Covid-19 пандемиясының іскерлік туризмге әсері зерттеліп, қазіргі кездегі іскерлік туризм индустриясында кездесетін мәселелер анықталып, оны одан әрі дамытудың мүмкіндіктері айқындалды. Авторлар іскерлік туризм ұғымының эволюциясын талдайды, іскерлік туризм құрылымын зерттейді, қазіргі заманғы тенденциялар мен іскерлік туризмнің «bleasure» турлар сияқты жаңа түрлерін ашады. Қазіргі іскерлік туризмнің мәселелерін анықтау үшін 2000-2020 жылдарға арналған іскерлік сапарлар туралы ЮНВТО мен салалық қауымдастықтар ұсынған статистикалық талдау қолданылды, туризм саласындағы өзгерістер зерттелді, олардың соңғы жылдардағы экономикалық және эпидемиологиялық өзгерістермен байланысы талданылды. Зерттеу нәтижелері іскерлік туризмнің қазіргі жағдайын бағалауды, SWOT-талдауды, басқа туризм түр-

лерімен салыстырғанда іскерлік туризмнің артықшылықтарын анықтауды, іскерлік туризм мәселелерін және іскерлік туризмнің болашақтағы даму болжамдарын талдауды қамтыды.

Түйін сөздер: іскерлік туризм, МІСЕ-туризмі, туризмнің дамуы, конференциялар, пандемия және туризм, bleasure туризм.

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Information about authors:

Литвинова-Куликова Л.А. – **корреспонденция үшін автор**, рекреациялық география және туризм кафедрасының докторанты, әл-Фараби атындағы Қазақ Ұлттық университеті, Алматы, Қазақстан.

Алиева Ж.Н. – география ғылымдарының кандидаты, доцент рекреациялық география және туризм кафедрасы, әл-Фараби атындағы Қазақ ұлттық университеті, Алматы, Қазақстан.

Денес Д.Л. – профессор, Сент Иштван университеті, Дьер, Венгрия.

Litvinova-Kulikova L.A. – **Corresponding author**, Ph.D. student of the Department of Recreational Geography and Tourism, Al-Farabi Kazakh National University, Almaty, Kazakhstan.

Aliyeva Z.N. – Candidate of Geographical Sciences, Associate Professor of the Department of Recreational Geography and Tourism, Al-Farabi Kazakh National University, Almaty, Kazakhstan.

Denes D.L. – Professor, Szent István University, Győr, Hungary.