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## Trends and Characteristics of the Ukrainian Touristic Industry Development in War Conditions and the Prospects for Emerging from the Crisis

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### ABSTRACT

The purpose of the research is to identify the plight of the touristic industry in Ukraine during the war, which had a severe impact on the sector. As a result of the research, the problems of the touristic industry in Ukraine during the war have been analyzed and it was shown that a large part of resources were lost, the impossibility of the internal and business tourism, which caused a threatening crisis for the entire industry. The quantitative analytic method, the system analysis and synthesis method were used in the research. The peculiarity of the touristic industry is that the entire Ukrainian economy has been shifted to military lines, the touristic infrastructure has begun to provide services to refugee, territorial defence, and volunteer organizations. The main regions that are attractive for tourists are Lviv, Ivano-Frankivsk, and Transcarpathia regions. It was concluded that domestic and foreign tourism in Ukraine demonstrates a desire to preserve itself as an important economic branch, a tendency to internal transformations in the wartime reality conditions and prospects for rapid recovery in the postwar period.

KEY WORDS: Ukrainian tourism, touristic industry, war, crisis, monitoring of the industry plight.

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## Tendencias y características del desarrollo de la industria turística ucraniana en condiciones de guerra y perspectivas de salida a la crisis

### RESUMEN

El objetivo del estudio es determinar la difícil situación de la industria turística de Ucrania durante la guerra, que afectó gravemente a este sector. Como resultado del estudio, se llevó a cabo un análisis de los problemas de la industria turística de Ucrania durante la guerra y se demostró que una parte importante de los recursos se perdió, la imposibilidad del turismo interno y de negocios, lo que provocó una crisis para toda la industria. En la investigación se utilizó el método analítico cuantitativo, el análisis de sistemas y el método de síntesis. La peculiaridad de la industria del turismo es que toda la economía de Ucrania se ha transferido al canal militar, la infraestructura turística ha comenzado a servir a organizaciones de refugiados, organizaciones de defensa territorial y organizaciones de voluntarios. Las principales regiones turísticas son Lviv, Ivano-Frankivsk y Zakarpattia. Se concluyó que el turismo nacional y extranjero en Ucrania demuestra el deseo de preservarse como una rama importante de la economía, una tendencia a las transformaciones internas en condiciones de guerra y perspectivas de una rápida recuperación en el período de posguerra.

**PALABRAS CLAVE:** Turismo ucraniano, industria turística, guerra, crisis, seguimiento de la situación del sector.

### Introduction

The relevance of the research touristic plight industry in Ukraine in the war conditions and the prospects for exiting the crisis is in great importance. Since February 24, 2022, a war has been going on in Ukraine, the superventions which are not only huge human losses, but also the infrastructure destruction, significant losses of the economy as a whole and its sectors. The war had the most acute effect on the touristic sector, which is particularly sensitive to crises and cataclysms. Instead of the domestic tourism development, there was a multi-million migration of the population within the state to safer ones, and the mass departure of Ukrainian citizens abroad was also determined not with the touristic goal, but by the desire to secure themselves and their families. With the beginning of the war, the touristic industry in Ukraine almost stopped functioning, and in eastern and southern Ukraine, tourism completely stopped. And only at the end of the spring 2022, touristic companies began to take careful steps in the directions restoring the offer.

## 1. Literature review

However, "even today, we should think about how to rebuild the country after the war, and a considerable role here must be given to tourism and hospitality, which, obviously, can recover much faster than the destroyed industry" (Bortnykov et al. 2023: 571). Therefore, for domestic touristic researchers, the tourism topic in war conditions and the industry restoration in the post-war period became cross-cutting. Particularly, attention was paid to these problems by N. Barvinok, E. Bortnikov, S. Zakharova, O. Marchenko, I. Verkhovod and G. Garbar, A. Zarubina, E. Syra and L. Demchuk, O. Kyrychenko, L. Korchevska, A. Motsa, S. Shevchuk and N. Sereda, O. Nosyrev, T. Dedilova and I. Tokar, R. Oleksenko, O. Roik and O. Nedzvetska, S. Tsymbalyukta, N. Rybalchenko and others.

Yes, today we are unable to clearly predict either the real starting positions of the Ukrainian economy in the post-war period, the level of touristic infrastructure preservation, or even the pace of secured territories in the post-war period. Therefore, it can only be about monitoring the plight of the industry, researching the world experience of post-conflict reconstruction, conceptualizing post-war tourism and drawing up the main directions of its development. Special attention should be paid to those directions that depend upon as little as possible on the infrastructural plight and require as modest funding as possible - thereby we can take care not only of the possibility for tourism to develop on its own, but also of the fastest possible ideas and projects incorporation into the destroyed Ukrainian economy.

Therefore, **the relevance** of the research lies in necessity to prepare for the rapid and productive post-war touristic development as one of the main economic branches, on the one hand, and on the other - as a proven physical and psychological recovery method of the population after significant losses and long-term stress.

**The purpose** of the article is to research the plight of the touristic industry in Ukraine during the war and outline the prospects for the touristic development in Ukraine in the post-war period.

## 2. Researching methods

To achieve the goal, the research used an interpretative-analytical method, which analyzed monitoring the industry plight, the research of the world post-conflict reconstruction experience, the post-war touristic conceptualization of and the drawing of

the main directions of its development through analysis, synthesis, generalization, systematization. Considering the importance of the philosophical component of identifying the plight of the touristic industry in Ukraine during the war, which had a sharp impact on the touristic sector, among general scientific methods, comparisons, analysis, synthesis, deduction, induction take the leading place. First of all, we are talking about analysis and synthesis, which made it possible to initially divide the main subject of the research into several smaller parts (problems): to analyze the of the touristic industrial problems in Ukraine during the war and show about the large resource part loss, the impossibility of entire and business tourism, which caused a threatening crisis for the entire industry. Then, on the basis of the above mentioned methods, separate parts were combined, which made it possible to determine not only the development peculiarities of the touristic industry in Ukraine, but also its further development trends. The peculiarity of the touristic industry is that the entire Ukrainian economy has shifted to military lines, the touristic infrastructure has begun to provide services to refugee, territorial defense, and volunteer organizations. Certain trends are already visible in the recovery of tourism in Ukraine: tourists are more often interested in health vacations in sanatoriums, where you can restore peace as far as possible from explosions and air alarms, the demand for trips for one person or for families has increased.

Decomposing the plight of the touristic industry in Ukraine in the war conditions and outline the prospects for the touristic development in Ukraine in the post-war period, a number of general scientific theoretical methods were used, such as system analysis and synthesis method, content analysis, system axiological, prognostic and comparative researching methods. qualities and values and their orientation to personality development during a tourist trip.

Based on the systematic method researching the plight of the touristic industry in Ukraine during the war and outlining the prospects for the touristic development in Ukraine in the post-war period, the touristic industry is considered as a complex system that includes many components, the research of which became an important task of this article. The systematic analysis and synthesis made it possible to analyze the empirical facts about the peculiarities of the touristic industry development in Ukraine in the war situation and to show that the war became a painful challenge not only for the touristic sector, but for the entire country as a whole. A number of systemic characteristics in the

touristic industry are analyzed - crises, political instability, militarization of the economy, increased tourist formalities, changes in the exchange rate - these are the policy results that negatively affect the image of the state, and therefore tourism. The touristic industry is considered as a complex system integrity, which consists of separate components that are interconnected and combined into a single, complete organism.

In some cases, the cross-cultural analysis method is used to determine differences in touristic industry development in certain regions in Ukraine. It has been shown that Lviv, Ivano-Frankivsk, and Transcarpathia regions remain the main regions attractive to Ukrainian tourists, trips in general to the Carpathians, and interest in excursions to Kyiv and Poltava regions. The conceptual researching foundations are provisions that characterize the meaningful and vector nature of the rest: the need for rest increases with every day of the war: fatigue accumulates and need to restore strength - physically and spiritually, Ukrainians increasingly prefer to take a rest in Ukraine. The research is based on methodological, theoretical and practical levels, which reflect the unity and fundamental scientific interdependent approaches to research the touristic industrial and their praxeological problem solutions and applications in practice. The humanistic approach assumes the focus on touristic individual management as the highest value and human needs realization during the war and in the post-war revival period.

### 3. Results

#### 3.1. The plight of the touristic and hospitality industry in Ukraine during the war

Not having time to recover from the crisis caused by the pandemic, the touristic industry received a new challenge brought by the Russian-Ukrainian war. The touristic industry in Ukraine faced a problem not with development, but of survival in the war conditions. The large part of the resource loss, the difficult economic situation, tense psychological plight of the country's population, the impossibility of internal and business tourism caused a threatening crisis for the entire industry (Tsymbalyuk, 2023: 100). It is known that tourism is one of the main economic branches in Ukraine, and as it develops in the country, the transport infrastructure develops in parallel, the ecological environmental conditions near tourist enterprises and recreational areas, urban and communal infrastructure improves. However, the touristic market, A. Zarubina, E. Sira and L. Demchuk emphasize, is very vulnerable to crises by various origins, such as natural

disasters, epidemical, socio-economic and political crisis, military conflicts, which lead to destabilization of the situation inside the country. The vulnerability of the touristic industry is confirmed by the situation in the touristic industry in Ukraine, which experienced a real catastrophe with the beginning of a full-scale war (Zarubina et al. 2022).

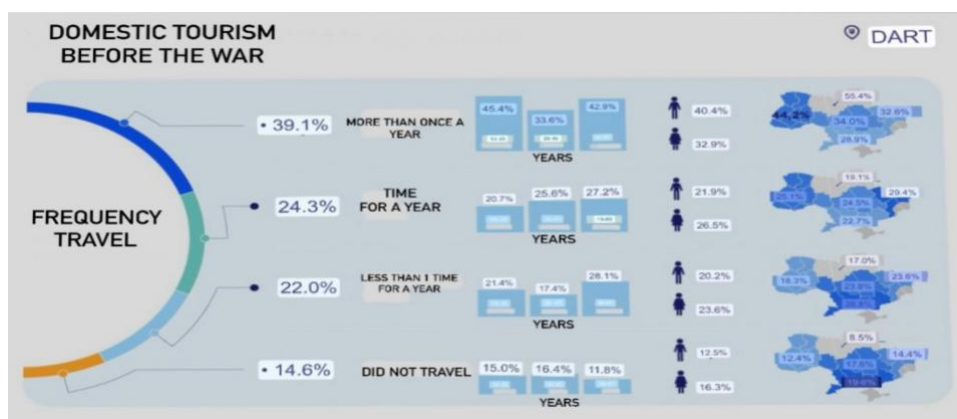
Ukrainian tourism has already lost and continues to lose significant funds, which is primarily due to the decrease in the total touristic number: since the first months of the war, Ukraine was practically devoid from foreign tourists, 13 of the 24 regions of Ukraine almost completely stopped the activities of touristic enterprises (Draft Recovery Plan of Ukraine). In fact, since February 24, the inbound tourist flow has been lost by 100%, business tourism has been frozen, and local tourism has turned into a movement of internally displaced persons (Chorny, 2022). The war became a painful challenge not only for the touristic sector, but for the entire country as a whole. The drastic decrease, and in some regions the disappearance of tourist flows, had a negative impact on the country's economy. In the war conditions, tourism in Ukraine suffers huge losses not only from the reduced tourist flows, but also from the loss of the tourist and recreational potential of the territories that came under occupation and suffered as a hostility results. (Barvinok, 2022: 207–208). So, in 2022, from the beginning of the war, the situation in the touristic industry in Ukraine became unprecedentedly difficult. For some time, the tourist industry almost stopped functioning, and only at the end of spring, touristic companies began to take careful steps in the direction of restoring the offer (Chorna, 2023: 72).

However, for an objective assessment of the situation, it is important to realize that Ukraine has experienced a significant decrease in inbound tourist flows since 2014, and this has had a negative impact on the socio-economic indicators of the country's development as a whole. A. Romanova connects this decline in the development of the Ukrainian touristic industry primarily with the deterioration of Ukraine's image in the world, in particular, the tourist image associated with a sense of danger due to the armed conflict in Donbas, mass protests in Kyiv (Romanova 2018: 94). According to the researcher, it is the political plight of the country that determines all other dynamic factors. Crises, political instability, militarization of the economy, increased tourist formalities, changes in the exchange rate - these are the results of politics that negatively affect the image of the state, and therefore tourism. The desire of tourists to visit a country where intensive military operations continue (even in the case of their localization in a certain region) either decreases or is

canceled. Not only the inability of the state to end or keep under control the military operations on its territory, but also the lack of a balanced strategy in the field of forming a positive tourist image of the country, do not contribute to the development of inbound tourism. Indeed, as early as 2016, according to the rating of the World Economic Forum, Ukraine was in the TOP-10 most dangerous countries for traveling in the world (World Economic Forum).

As for domestic tourism, according to the State Agency for Tourism Development of Ukraine (SATD) research, before the start of the full-scale war, more than 85% of respondents traveled to Ukraine (the survey was conducted online among Internet users; respondents were urban residents aged 18 to 60). The most active travelers (they traveled the country more than once a year) were residents of the capital and western regions - 39%. Residents of the East were less active and traveled through Ukraine once a year - 24%. 22% traveled within the country once every two years, mainly residents of the central regions. But 14% of our compatriots did not travel at all, and these were residents of the South. Among the main reasons Ukrainians refused to travel, the most common (70% of responses) was "lack of funds" (Fig. 1).

Fig 1. Domestic tourism before the war



Source: (81% of Ukrainians).

Currently, a significant number of touristic attractions have been destroyed, hotels and restaurants in many cities of Ukraine have been destroyed or damaged. Many cities were left without tourism at all, and the industry of international tourism is mostly frozen in Ukraine (Tsybalyuk, 2023:100). A large number of touristic companies have closed or repurposed their activities, and hotels, sanatoriums and tourist bases are accepting refugees



from the occupied territories. The situation is complicated by the fact that the sky over Ukraine is closed for flights (Zarubina et al. 2022). Restaurants, canteens, and cafes began to provide food services to refugees, territorial defense, and volunteer organizations. The hospitality industry, like the entire Ukrainian economy, has shifted to war mode (Shynkarenko et al. 2023: 136). According to experts' estimates, in 2023, Ukraine will use only a third of the available tourist potential. Even territories that are not occupied and relatively safe do not have a large influx of tourists, even in such successful resorts as Morshyn, Truskavets, Bukovel or Skhidnytsia. And although the total population in the western region has increased, refugees are not the factor that ensures the income of the touristic industry (Tsybalyuk, 2023: 100).

Since the beginning of the war, Ukrainian hotels in many cities act as hubs for the accommodation of refugees, prepare hot meals for Ukrainian defenders and volunteers, provide their premises for humanitarian aid warehouses (Nosyrev et al. 2022: 56). And here it is appropriate to note that the activity of hotels and other means of temporary accommodation is the most profitable and, at the same time, risky (profitability – 9.62%, riskiness – 20.78%). This branch of the hospitality industry, on average, accounts for 23.42% of the total volume of sales (goods, services) of temporary accommodation and catering enterprises. The industry "activities of means of accommodation for the period of vacation and other temporary residence" has a loss from management at the level of 4.79%, the riskiness of investments is 4.90%. Enterprises in the field of "activities of restaurants, provision of mobile food services" have a profitability level of 2.33%, a degree of risk of 1.07%, their share is the largest in the total volume of production (54.46%). The industry "Supply of ready meals" has a low level of profitability (1.15%), but the riskiness in this segment of activity is only 0.60%. The field of activity "beverage service" has the following investment indicators: profitability 1.23%, degree of risk - 2.55% (Shynkarenko, 2023: 139–140).

According to Interfax-Ukraine, as of January 2023, more than 12 hotels with a total number of 982 rooms have been destroyed or damaged in Ukraine since the beginning of the war (unfortunately, the number is not final). According to R. Khoma, head of EY's real estate advisory services in Ukraine, most of the hotels destroyed and damaged since the beginning of the full-scale Russian invasion were located either in the areas of hostilities or in areas close to them. These are Kharkiv, Chernihiv, Kherson, Mykolaiv, Kyiv region. etc.

Despite the fact that there is still no exact information on the total number of destroyed or damaged hotels in Ukraine, 12 hotels were publicly announced: ALFAVITO (Kyiv, 229 rooms), Grand Admiral Resort&SPA and Babushkin Sad (Kyiv region, 64 and 30 rooms ), "Ukraine (Chernihiv, 99 rooms), "Kharkiv" and SV Park (Kharkiv, 205 and 17 rooms), Grande Pettine (Odesa, 91 rooms), Play Hotel by Ribas (Kherson, 25 rooms), Sunrise Park (Zaporizhia , 24 rooms), Reikartz River, "Ingul" and "Mykolaiv" (Mykolaiv, 98, 40 and 60 rooms, respectively) (More than 12 hotels were affected, 2023).

There is also a shortage of personnel. Initially, due to the reduction in demand for tourist services, the profitability of the touristic industry decreased significantly, and some enterprises left the tourism market, some others temporarily stopped their activities. As a result, there was a lot of unemployment in the industry, which led to the fact that a large number of workers went abroad, others changed their qualifications and reoriented themselves to work in other industries. Therefore, even now, those enterprises that are beginning to resume their activities are facing the problem of "personnel hunger", and in the near future, in our opinion, the situation with personnel support is unlikely to be resolved (Chorna, 2023: 76).

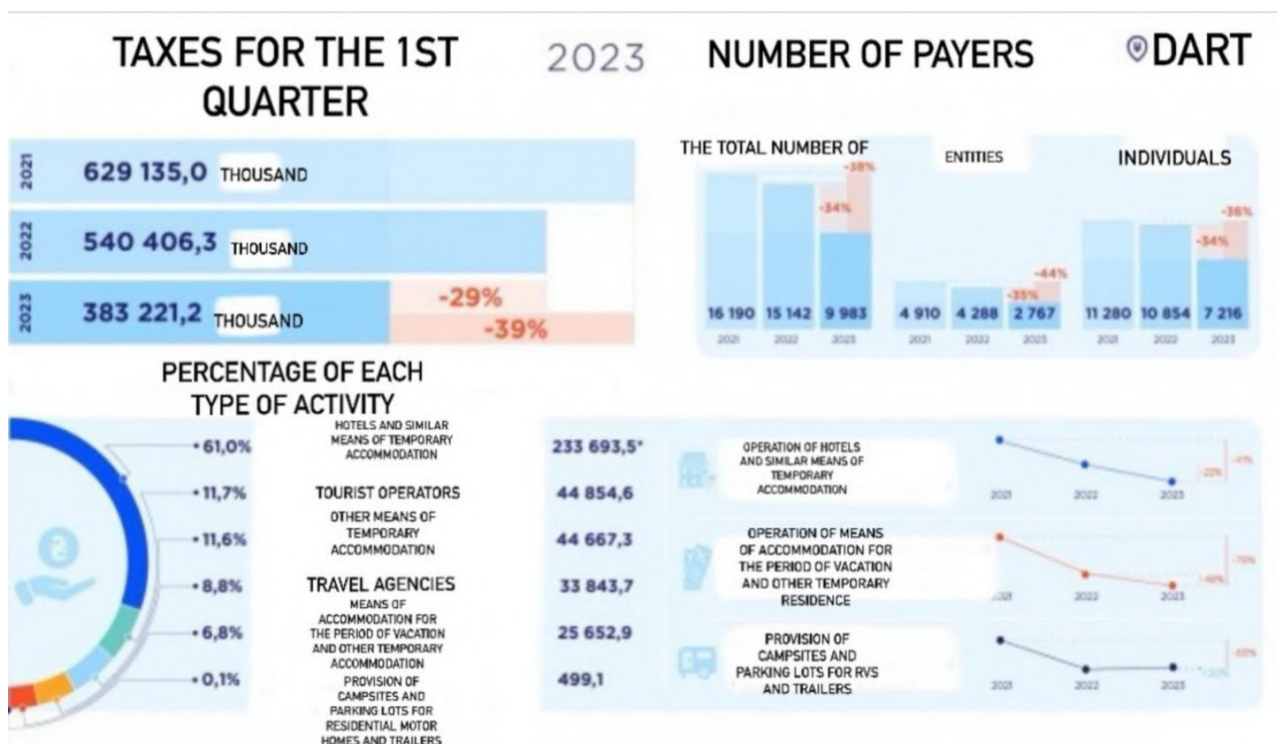
Revenues to the state budget show a natural decline. In particular, the amount of taxes paid by representatives of the tourism sector to the state budget for the first four months of 2022, compared to the corresponding period of 2021, decreased by 18%. The number of taxpayers involved in the touristic industry also decreased by 10%. The largest amount of funds to the budget for the analyzed period came from hotels and sanatoriums - UAH 340 million, but this is 24% less than in the last pre-war year. At the same time, compared to 2021, the recorded increase in income from the activities of travel agencies rose by 85% - this fact was repeatedly cited by researchers as an indicator of the resilience of the touristic industry to military challenges. However, as A. Zarubina, E. Syra and L. Demchuk rightly note, this is due to the fact that the reporting period included two pre-war months, when early bookings for New Year and Christmas holidays became more active (Pavlysh, 2022). Meanwhile, the touristic industry has not yet experienced significant economic losses, because it was just beginning to enter the recession period, - "The losses will begin to be felt at the end of the season, which, as a rule, begins in June-July, and reaches its peak at the end of summer - in the middle of autumn." (Zarubina et al. 2022).

As the experts predicted, the problems of the touristic industry only worsened in the future: in the first three months of 2023, the representatives of Ukraine paid 29% less taxes (383 million 221 thousand UAH) than in the same period of 2022, when 540 million were received in the budget 406 thousand UAH. And compared to the same period in 2021, the drop was 39% (then 629 million 135 thousand UAH were transferred to the state treasury from the touristic industry). The total number of taxpayers engaged in tourist activities decreased by 34%. The number of legal entities decreased by 35%, and the number of individuals decreased by 34%. If we compare this indicator with the first quarter of 2021, the total decrease was 38% - legal entities by 44%, individuals by 36%. The largest share of revenues to the state budget (61%) was paid by hotels - 233 million 693 thousand UAH. This is 22% less than the same period of 2022 (299 million 782 thousand UAH) and 41% less than the same period of 2021 (394 million 576 thousand UAH). In the first three months of this year, the share of tax paid from the activities of camping sites and children's recreation camps decreased by 48%. The budget received 25 million 652 thousand UAH of tax from these means of accommodation compared to 49 million 112 thousand UAH for the first three months of last year. If we compare the same period with the same period in 2021, tax revenues fell by 78%. A small increase in taxes paid (by 20%) from the activities of camping sites and RV parks was recorded. However, compared to 2021, taxes from the activities of these accommodation facilities decreased by 67%. According to the Chairman of SATD M. Oleskiv, the first quarter of the year is always characterized by the lowest tax revenues from the touristic industry, because the tourist season in Ukraine begins in May and ends in November (In 2023 to the state budget) (Fig. 2).

### 3.2. Anti-crisis trends in the touristic industry in Ukraine during the war

But, despite all the troubles, the touristic industry in Ukraine continues to function even during the war. As N. Chorna rightly observes, it is already very important for the economy and for society as a whole to preserve at least some part of the tourism sector in order to restore it completely after the war with greater success (Chorna, 2023: 73). Already with the beginning of the summer season 2022, requests from Ukrainians for recreation began to appear on the domestic tourism market - their interest was mainly related to domestic tourism. The main regions attractive to Ukrainian tourists are the conditionally safe regions: Lviv, Ivano-Frankivsk and Transcarpathia regions.

Fig. 2. Taxes to the state budget from the touristic industry for the 1st quarter.



Source: SATD (In 2023 to the state budget).

There is a great demand for trips to the Carpathians. Excursion tours to castles and museums, which had been inactive since the beginning of the war, began to resume. Interest in excursions to Kyiv and Poltava regions (Prysedska, 2022) is increasing. Gradually, children's camps began to open - mainly in the western Ukraine: in Lviv, Ivano-Frankivsk and Transcarpathia regions. (Zarubina et al. 2022). However, we are not talking about sea vacations. Similarly, Askania Nova, Oleshkivsky sands, Dzharylgach, Pink Lakes, Stanislavski mountains are only a small part of the favorite tourist spots that are inaccessible to Ukrainians due to the occupation (Prysedska, 2022).

Many of our fellow citizens are confused by the question of whether it is ethical to even think about rest when the country is at war. According to the head of SATD, the return of the touristic industry to work is extremely important. "Each job in tourism creates about 10 jobs in related industries (food, entertainment and others). Companies pay taxes, donate to the front," explained M. Oleskiv even last year (Prysedska, 2022). She returned to this problem on the eve of the summer season in 2023. According to it, "in order to support the economy of a large part of our country, it is important that this year Ukrainians travel

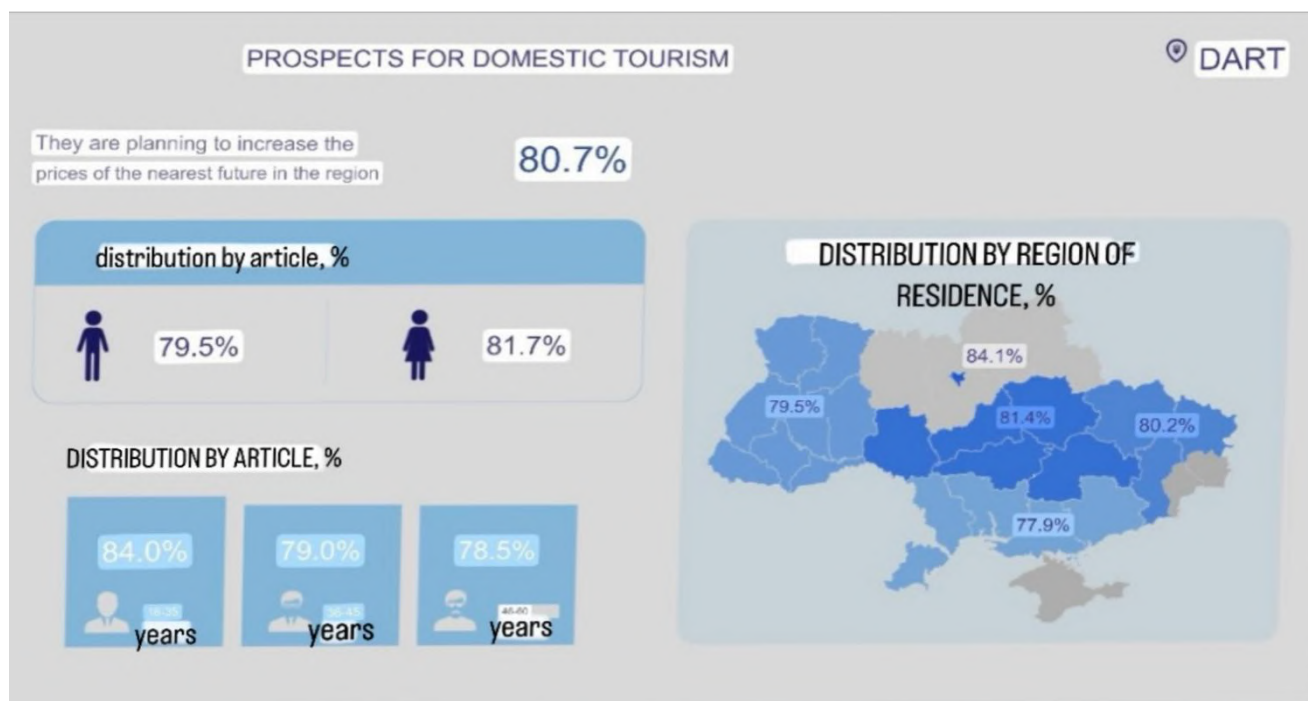
more to safe regions of the country, not only to recharge and spend time with relatives, but also to support our industry, that today, more than ever, needs tourists" (In 2023 to the state budget). And it is obvious that the ways out of the crisis should be sought not only at the level of travel agencies and tour operators, but also (and above all) at the national and supranational political institutional level, formulating political solutions capable from maintaining equilibrium, and producing adequate state and interstate regulation mechanisms (Oleksenko et al. 2021: 770). It is also obvious that increasing the effectiveness of the mechanism implementation of the state policy in the touristic sphere of Ukraine involves taking into account time requirements" (Oleksenko et al. 2022: 451).

About the importance of traveling in Ukraine even during the war, even a year ago, the manager of the EtnoSvit travel company, which specializes in domestic tourism, spoke: "The more you get to know Ukraine, its history and traditions, the more you love it and want to develop it," says Denys. Lenchenko. He testified to the emergence of interest in excursions in the Kyiv region: Dobropark, the canyon in Buky, "Alexandria" in Bila Tserkva, Rzhyshev. But demand has not recovered even by 10% compared to last year. Ihor Zakharenko, the founder of "Traveling Extravaganza", decided to resume tourist trips after talking with the military in the trenches: they asked where they could send their wives and children on vacation, because they needed to be distracted. In addition to the Carpathians, Transcarpathia and Volhynia, "Feriya Mandriv" organizes excursions to Kam'yan village in Zhytomyr region, to Baturyn in Chernihiv region, and plans to resume tours to Poltava region. "It is impossible to live under stress all the time. People need to switch gears, recharge with energy in order to work with new strength," says Zakharenko (Pryedska, 2022).

According to A. Taranenko, the head of the board as "Visit Ukraine Today", certain trends are already visible in the tourism recovery in Ukraine: tourists are more often interested in health vacations in sanatoriums and similar options, where you can restore peace as far as possible from explosions and air alarms; demand for solo or family travel has increased, and group tours have become less popular; availability of light, water, communication and shelter - a priority requirement for hotels, hostels, etc.; Ukrainians book tours mostly at the last moment - "for tomorrow", because it is impossible to plan in advance during a full-scale war (Tourism during the war. As an industry, 2023).

Therefore, the need for rest increases with each day of the war: fatigue accumulates and the need to restore strength - physical and spiritual. However, the nature of the benefits has certainly changed. In connection with the security risks and problems caused by the war, Ukrainians are increasingly preferring to rest in Ukraine. This enables our fellow citizens not to leave the house for a long time and not to spend a lot of money. For the same reason, most tourists choose short-term vacations, while long-term vacations have gained popularity among able-bodied Ukrainians who work remotely (Chorna, 2023: 77). In June 2023, the State Tourism Development Agency in Ukraine conducted a survey among Ukrainians about plans to travel the country in the nearest future, and also found out the regions where the most active travelers live. According to a research commissioned by SATD the Human Research in partnership with the survey panel Lemur, the most avid travelers (84%) live in the capital. The willingness of residents of other regions to travel to Ukraine is correlated at the level about 80%. At the same time, women aged 18 to 35 turned out to be more active tourists than men (81% of Ukrainians) (Fig. 3).

Fig. 3. Prospects for the domestic tourism.



Source: SATD (81% of Ukrainians).

Foreign tourism in wartime also has its own characteristics. First of all, it should be taken into account that the majority of Ukrainians go abroad not for recreation, but to

evacuate from dangerous territories where hostilities are ongoing. In addition, the sky over Ukraine is completely closed, which makes it difficult to travel to other countries. However, despite the extremely unfavorable conditions, with the beginning of the 2022 season, foreign tourism also began to wake up somewhat. From the beginning of the war, evacuation flights to Bulgaria have been the most popular among Ukrainians, which is caused by the free accommodation in hotels offered by this country to Ukrainians. Sea flights to Turkey, Egypt, Spain, and Tunisia also began to resume. However, for this Ukrainians had to go to the airport in neighboring Poland on their own. Vacation tours to Lithuania and Moldova were organized in the same way (Motsa, 2022). We will remind that the war affected foreign tourism even before February 24, when it was just starting to gain momentum after two years of anti-pandemic restrictions. The first impetus was the refusal of Western carriers from the flights to Ukraine, then there was concern, and later the ban and other carriers to fly in Ukrainian skies. At that time, it was possible to settle the issue at the state level, but not for long time, because a full-scale invasion began literally in a week (Kyrychenko, 2022).

It is also worth noting the transformations that the touristic industry underwent during the war. L. Korchevska draws attention to this, singling out the characteristic features of the tourism sphere during the war: the focus of tourism management on volunteerism and the transformation of tourist hubs into humanitarian or volunteer headquarters; request for bomb shelters or other protective structures on the tourist routines; minimization of the routes around important state and military facilities that may become targets of missile and bomb attacks; the impossibility of beach and hiking tours in the southern areas due to hostilities and the presence of minefields, which are expected to take several years to clear after the end of the war. At the same time, there are no completely safe regions in Ukraine during the war, which has a negative impact on the country's tourist attraction, which is currently close to zero. Foreign tourists are wary of visiting Ukraine due to regular artillery shelling and rocket-bombing, significant destruction of infrastructure and increased danger, and do not have such an opportunity due to the suspension of air traffic (Korchevska, 2022). And yet, as M. Madejsky writes in this year's analytical publication for "Business Insider Polska", there are many tourists from Poland who simply want to visit Ukrainian cities, and the war does not stop them. Most of them mainly choose the west of Ukraine. It is relatively calm here, and not far from Poland.

There are even organized tours. The Quand office from Tomaszów Lubelski offers a one-day tour of Lviv for PLN 150 or a two-day tour (with accommodation) for PLN 450. The trip includes a visit to Lviv, a stop at the local George Hotel, a tour of the monument to Adam Mickiewicz, and even a visit to a performance at the Lviv Opera (Madejski, 2023).

Another (and extremely important) direction of touristic activity in Ukraine during the war is work for the future: germinating the seeds of the future post-war recovery of the touristic industry. As A. Zarubina, E. Syra, and L. Demchuk rightly point out, it is necessary to take care of this today (Motsa et al. 2022). And such an opinion is not unique, it is supported by both researchers of the touristic industry and practitioners. And the State Tourism Development Agency of Ukraine is already making significant efforts, including in the international arena, laying the foundations for such a revival.

Until today, Ukraine was one of the few countries in Europe that did not have the privilege of membership in the European Tourist Commission. The main mission of the ETC is to represent the national touristic body interests in Europe, to promote European countries as a its destination worldwide, to provide unique expertise to its members and a stable base for strategic cooperation and exchange of experience. During the war, SATD made significant efforts to better integrate the Ukrainian tourist environment into the European community. Now the European Tourist Commission has officially invited SATD to join the organization (Royk-Nedzwiecka, 2022). During the General Meeting, the members of the ETC, the heads of the national tourism bodies (NTOs) of Europe, having expressed complete solidarity with Ukraine, decided to start the procedure of granting SATD membership for at least three years on a free basis. At the end of this term, a decision on standard membership will be made. The commission intends to create an aid fund, the funds from which will be directed to the restoration of the tourist and recreational infrastructure of Ukraine (SATD). The decision on complimentary membership in the ETC for Ukraine enabled SATD to use all the resources of this organization and to attract investments and funds for the development of tourist locations.

Meanwhile, the SATD, striving to lay the strongest possible foundation for the post-war development in the touristic industry, is making significant efforts to present Ukrainian tourism on the international stage.

Particularly, on November 27, 2022, Ukraine took part in one of the most prestigious events in the European touristic industry, the Warsaw International Travel Show 2022 (TT



Warsaw). The main purpose in participation on the exhibition was to highlight real events in Ukraine and to learn from the experience of the other countries regarding the touristic industry revival in the post-war period (SATD introduced Ukraine). On March 1, 2023, Ukraine took part in the European travel fair BTL-Lisbon Travel Market 2023 in Lisbon. Ukraine's stand appeared at the exhibition thanks to the fruitful SATD with the Embassy of Ukraine in the Republic of Portugal and the Portuguese Tour Operators Association and Tourism @APAVTO official cooperation, which granted our country the status as a chief association guest. Telling the world about the tourism potential in Ukraine and attracting as much international support as possible is the main SATD participation goal in the exhibition. Within a few hours of operation, the stand of Ukraine became incredibly popular among visitors (SATD presented). On June 13, 2023, Ukraine took part in the international tourism exhibition Tourexpo Galicia in the Spanish city of Silleda. Ukraine and Kyiv were represented by the Department of Tourism and Promotions of the Kyiv City State Administration and the municipal non-profit enterprise "Kyiv Tourism Development Center". Representatives of Ukraine presented video and printed materials about the tourism potential of the country and the capital at the stand, which attracted a lot of attention of visitors, mass media and exhibition exhibitors. It is significant that the management of Tourexpo Galicia gave the Ukrainian delegation the opportunity to participate in the exhibition free of charge, and the mayor of the city, Manuel Quiña Fernández, expressed his readiness for further cooperation and presentation of the tourism opportunities of our country (Ukraine participated).

And at the 68th meeting of the European UN World Tourism Organization Commission, which took place on June 1, 2023 in the city Sofia (Bulgaria), Ukraine was elected the chairman of this body (Ukraine has been a full member of the WTO since 1997). Chairmanship of the Commission in the European Region opens up new opportunities for Ukraine to cooperate with the European countries and the world at the professional international level. "It will be easier for Ukraine to restore the exhausted and war-ravaged touristic infrastructure. We actively cooperate with the UN WTO, especially in war times. Now is the time to integrate into the large European environment and occupy our unique niche," said the Head of the Ukrainian delegation, "I am sure that our experience will play a key role in the formation of the new European touristic architecture, since this industry, in

my opinion, is the main peace and prosperity indicator of any country in the world" (Ukraine for the first time in history).

The great interest in Ukraine, which is observed in the world, needs to be converted into future tourism projects - the head of the State Tourism Development Agency believes. "After the victory, we are preparing to quickly tell the world who we are and why you should visit us," says Maryana Oleskiv (Pryedska, 2022). So let's hope that such efforts will create proper prerequisites for the successful post-war touristic development.

## Conclusion

Having analyzed the plight of the touristic industry in Ukraine in the war conditions, we came to the following conclusions:

- The vulnerability of the touristic industry to crises by various origins, such as natural disasters, epidemics, socio-economic and political crises, military conflicts, which lead to destabilization of the situation inside the country, is confirmed by the situation in the Ukrainian touristic industry, which experienced a real collapse with the beginning of a full-scale war. With the beginning of the war, the touristic industry in Ukraine almost ceased to function. Ukrainian tourism has already lost and continues to lose significant funds, which is primarily due to a decrease in the total number of tourists: in the first months of the war, Ukraine was practically devoid of foreign tourists, 13 out of 24 regions of Ukraine almost completely stopped the activities of touristic enterprises. The internal tourist flow was completely lost, business tourism was frozen, and local one turned into a movement of internally displaced persons. In the war conditions, Ukrainian tourism suffers huge losses not only from the reduced touristic flows, but also from the tourists' loss and recreational potential of the territories that came under occupation and suffered as a result of hostilities. A significant number of touristic attractions were destroyed, hotels and restaurants in many cities of Ukraine were destroyed or damaged. A large number of touristic companies have closed or repurposed their activities, and hotels, sanatoriums and tourist bases are accepting refugees from the occupied territories.

- Only at the end of the spring 2022, touristic companies began to take careful steps to restore the offer. However, according to experts' estimates, in 2023, Ukraine will use only a third of the available touristic potential. Even territories that are not occupied and relatively safe do not have a large influx of tourists. As on January 2023, more than 12 hotels

with a total number 982 rooms have been destroyed or damaged in Ukraine since the beginning of the war. There is a personnel shortage: those enterprises that have begun to resume operations faced the "personnel hunger" problem, and in the nearest future the situation with personnel support is unlikely to be resolved.

- But, despite everything, the touristic industry in Ukraine continues to function. The main attractive regions for Ukrainian tourists are the conditionally safe Lviv, Ivano-Frankivsk, and Transcarpathia regiond. There is a great demand for trips to the Carpathians. Excursion tours to castles and museums, which had been inactive since the beginning of the war, began to resume. Interest in excursions to Kyiv region and Poltava region is increasing. In the touristic recovery in Ukraine, certain trends are already visible: tourists are most often interested in healthy sanatoriums vacations, etc., where you can restore peace as far as possible from explosions and air alarms; demand for solo or family travel has increased, and group tours have become less popular; light, water, communication and shelter availabilities - a priority requirement for hotels, hostels, etc.; Ukrainians book tours mostly at the last moment - "for tomorrow", because it is impossible to plan ahead during a full-scale war.

Considering the above, we can generalize that both domestic and foreign tourism in Ukraine demonstrates a desire to preserve itself as an important economic branch, a tendency towards internal transformations in the war conditions time reality and rapid recovery prospect in the post-war period. At the same time, it is very limited and dependent on the situation in the country, which is caused by the continuation of hostilities in many Ukrainian regions, the missile strikes threat throughout the country, the infrastructure destruction and low citizen incomes. The main Ukrainian touristic wartime condition feature is mainly related to the safety of Ukrainian and foreign citizens. And although during the war the general situation with the touristic industry of our country looks quite pessimistic, there is every reason to hope for a quick recovery after the end of the conflict.

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