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Tourist Potential of Ukraine: Challenges and Prospects of the Post-War Time

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Abstract:

The tourism industry is one of the sectors of the global economy most affected by the pandemic. At the same time, in 2022, having not yet fully recovered from the impact of quarantine restrictions, it was forced to face a completely new challenge for itself - large-scale military operations on a large part of the European territories. It was Ukraine and its tourism sector that suffered the most from the war, and since the prospects for the end of the war are very uncertain, the issue of preserving the country's tourism potential, finding ways to speed up its recovery and post-war development of the tourism sector of Ukraine are gaining particular relevance.

To substantiate the prospects and challenges for the tourism potential of Ukraine in the post-war period and to determine the key directions of actions of the state and business for its preservation, effective use and expansion during the war period.

The methodological basis of the study was made up of general scientific and special methods of economic theory, in particular, methods of theoretical generalization and comparative analysis and synthesis for the purpose of researching all processes and phenomena of the tourism sector of Ukraine in interdependence and interconnection. In the course of the study, statistical materials of the European Union and Ukraine were applied on the functioning of the tourism sector of the economy and processed using the methods of statistical analysis: comparison, grouping, calculation of average values and proportions, as well as analytical data and assessments of specialized state agencies of Ukraine were used.

A comparison of the impact of the COVID-19 pandemic on the development of the tourism sector of Ukraine and individual EU countries and the shares of tourism trade turnover in their GDP is made, which has revealed to note the low level of use of Ukraine's own tourism potential in the pre-war period. The key strengths and weaknesses of the tourism sector of Ukraine according to the version of the World Economic Forum have been studied and the prospects and consequences for them as a result of the war have been substantiated. A number of strategic courses of action for the state and business are proposed, based on the main possible prospects for the duration of active hostilities.

Keywords: tourism sphere; tourism potential; Ukraine; war; post-war recovery, prospects; challenges; development.

JEL Classification: M54; Z32.

Introduction

The tourism industry is one of the sectors of the global economy that has been most affected by the pandemic. At the same time, in 2022, having not yet fully recovered from the impact of quarantine restrictions, it was forced to face a completely new challenge for itself - large-scale military operations on a large part of the European territories. Thus, the active growth of indicators of global turnover in the field of tourism at the beginning of this year came to a sudden halt at the end of February, and not even so much because of the actual hostilities on the territory of our country, but because of the uncertainty of the nearest prospects for economic development and sanctions restrictions on the aggressor country and its satellite. It is clear that the key purpose of the imposed international sanctions is to weaken the Russian economy as much as possible, but at the same time, they also have a significant impact on the economies of the countries that impose them. According to analysts' forecasts (Guenette, Kenworthy and Wheeler 2022; Ukraine war to cause biggest price shock in 50 years 2022. World Bank), it is the economy of the developed countries, and in particular, the countries of the European Union, that will suffer the most from the war in Ukraine, of course with the exception of Ukraine itself.

The main consequences of the sanctions, primarily for the European countries, have been the increase in the price of fuel and energy resources and, as a result, the increase in prices for almost all types of products and services, which could not but bypass services in the field of tourism business, affecting both incoming and outgoing tourist flows. This, in turn, has forced international organizations to even revise their previous forecasts regarding the recovery of the industry - so, according to the Organization for Economic Cooperation and Development, the full recovery of international tourism at the pre-pandemic level should be expected no earlier than 2025 (OECD Tourism Trends and Policies 2022).

1. Research Background

International and regional organizations, national structures and associations, as well as a number of researchers whose works are relevant for certain countries, regions, etc., have been paying considerable attention to the study of the problems and prospects of the tourism business, especially since the global manifestation of the consequences of the COVID -19 pandemic.

Domestic scientists also do not ignore the problem of the functioning of the tourist business during the war and the ways and possibilities of its post-war recovery. In particular, A. Motsa, S. Shevchuk and N. Sereda (2022) propose to refer to the experience of the post-conflict restoration of tourism in Croatia and Cyprus, but do not take into account the fact that in both studied countries there were precisely civil conflicts without the use of that excess of extremely destructive artillery and missile projectiles that is currently taking place in Ukraine, without large-scale destruction of civilian infrastructure and extreme damage to the environment.

Another team of scientists (Zarubina, Sira and Demchuk 2022), having analyzed the tourism sector of Ukraine under martial law, comes to a conclusion regarding the need to form a strategy for the post-war recovery of Ukraine and the development of tourism in places of military glory. The opinion regarding the need to develop military tourism is supported by M. and N. Barvinok (2022), who, in their research, focus on attempts to assess the lost tourist and recreational potential of the country as a result of the occupation of territories and full-scale hostilities, destruction and theft of the national cultural and artistic heritage, etc., and on the study of the possibilities for restoring the country's tourism industry at the expense of military tourism in the post-war years. Some authors (Bozhko and Kholodok 2022) conducted a study of views on the relationship between war and tourism, especially in the context of evaluating and analyzing the possibilities of the development of the tourism sector in the conditions of terrorist or military threats.

Highlighting previously unsolved parts of the general problem, to which the article is devoted. The question of the post-war development of the tourism sphere of Ukraine and the search for ways of its accelerated recovery are currently in the field of view of a significant number of scientists. However, at the same time, the available studies are somewhat narrowly focused and do not offer a comprehensive examination of the challenges and prospects for the domestic tourism business in the post-war period.

Formulation of the goals of the article. The purpose of the study is to substantiate the prospects and challenges for the tourism potential of Ukraine in the post-war period and to determine the key directions of state and business actions for its preservation, effective use and expansion during the war.

2. Methodology

The methodological basis of the research is made up of general scientific and special methods of economic theory, in particular, methods of theoretical generalization and comparative analysis and synthesis with the aim of researching all processes and phenomena of the tourism sector of Ukraine in interdependence and

interconnection. In the course of the study, statistical materials of the European Union and Ukraine on the functioning of the tourism sector of the economy are applied and processed using the methods of statistical analysis: comparison, grouping, calculation of average values and proportions, as well as analytical data and assessments of specialized state agencies of Ukraine are used.

Presentation of the main material of the study with a full justification of the obtained scientific findings. The tourism sector of Ukraine during the period of total quarantine restrictions was characterized by similar trends to the group of countries of the European Union, connected by decades of common economic space in the past (Table 1).

Table 1. Quarterly indicators of relative changes in turnover in the field of tourism in Ukraine and individual EU countries in 2020–2021 (to the same period of the previous year)

Country	2020				2021			
	Q I	Q II	Q III	Q IV	Q I	Q II	Q III	Q IV
Ukraine	-2.95	-58.4	-40.9	-40.7	49.8	138.3	84.6	57.6
Bulgaria	-23.2	-94.5	-69.3	-72.3	-54.2	576.9	155.6	128.9
Czechia	-20.2	-93.9	-82.6	-83.1	-66.9	381.3	172	261.2
Estonia	-21.4	-82.8	-83.8	-84	-74.2	106.7	231.2	306.8
Latvia	-15.1	-81.6	-69.1	-70.9	-60.2	140.9	92.4	136.6
Lithuania	-24.1	-94.8	-87.7	-83.5	-63.4	537	353.1	305.7
Hungary	-38.8	-85.3	-81.4	-88.7	-67.8	42.2	112.2	358.2
Romania	-12.7	-79.4	-50.6	-58.9	-41.8	197.5	49.3	123.9

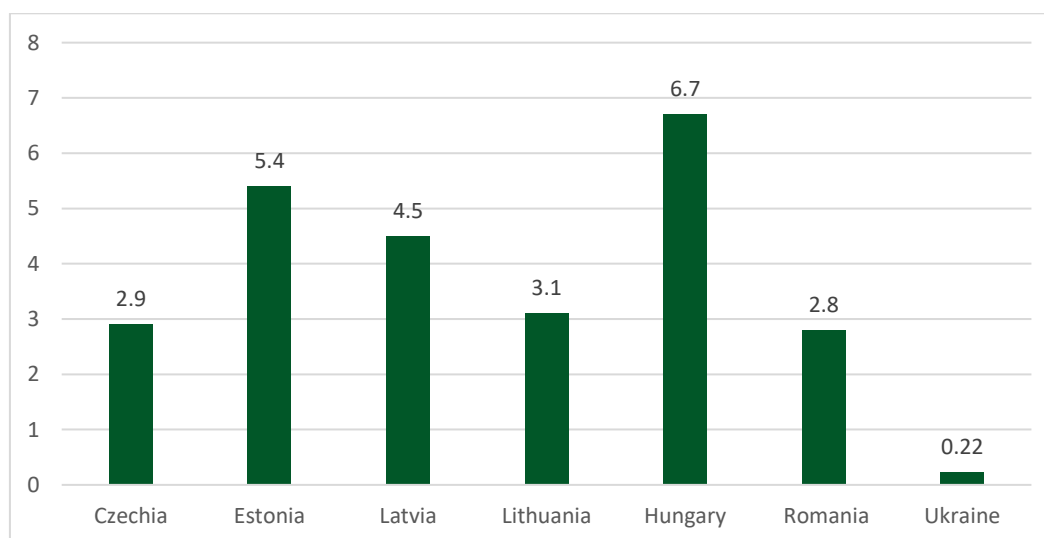
Source: built and calculated by the author according to data (State Statistics Service of Ukraine; Turnover in services – quarterly data. Eurostat)

However, despite the similarity of trends, the calculated indicators allow us to note clear differences. Thus, the domestic tourism sector lost significantly less as a result of COVID-19, recording a loss of a maximum of 60% of turnover in Quarter II of 2020 compared to the same period of the previous year. In contrast, other countries of the post-socialist camp in the same period recorded a drop from 80% in Romania to 95% in Lithuania and Bulgaria.

The recovery of tourist activity in Ukraine also began earlier than in other studied countries - according to the results of the first quarter of 2021, the domestic tourism business recorded an almost 50 percent increase in turnover. On the other hand, in the studied countries of the European Union, business continued to reduce indicators of tourism turnover. It should be noted that although the recovery of the tourism sector in the studied EU countries began later than in Ukraine, it was characterized by significantly higher rates of growth.

It should be pointed out that, compared to the studied countries, the share of the contribution of the domestic tourism business to the gross domestic product is extremely low (Fig. 1).

Figure 1. The share of the country's tourism turnover in its GDP (average value for 2019–2021), %*



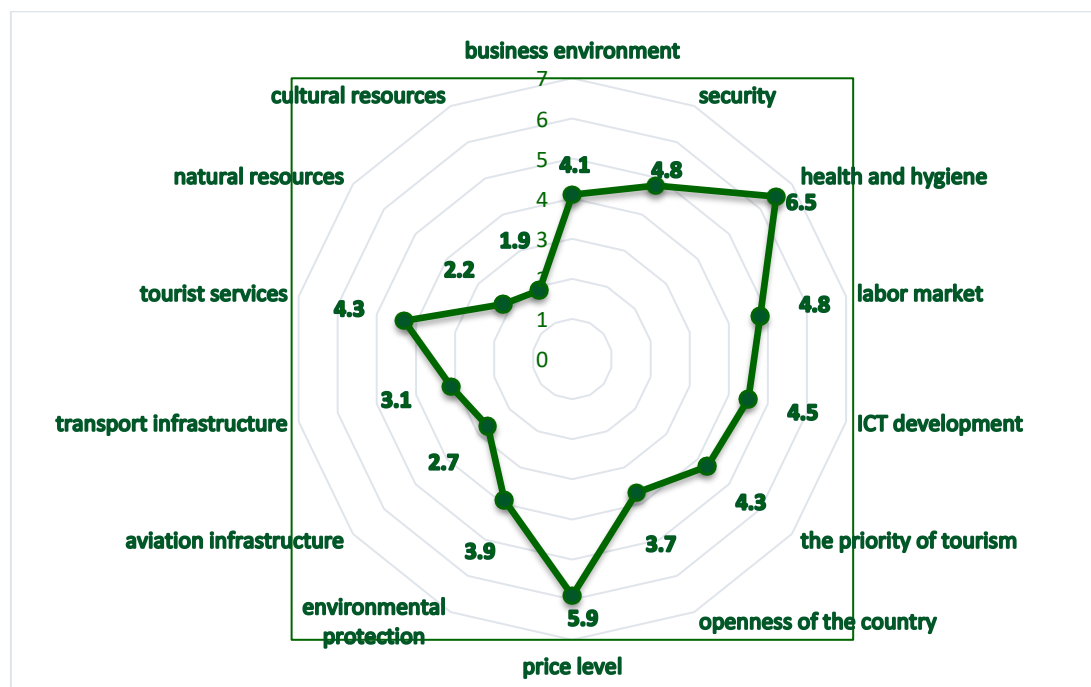
Source: calculated by the author according to data (State Statistics Service of Ukraine; Global and regional tourism performance: compare indicators. UNWTO)

In fact, with the extraordinary beauty and tourist value of the territory, the majestic culture and a significant number of historical and artistic monuments, Ukraine almost does not use the existing tourist potential, especially in comparison with the studied countries of the post-socialist space. Thus, the tourism business forms only 0.22% of the domestic gross domestic product product, while in neighboring Romania and Hungary – 2.8 and 6.7%, respectively.

It is worth noting that at the beginning of 2022, the tourism sector of Ukraine became noticeably more active, showing a significant increase in the volume of activity, however, a full-scale military invasion completely destroyed all the hopes of business representatives in the field of tourism. At the same time, in just a few months of full-scale war - as of June 13, 2022 - the damage caused to the sphere of culture and tourism was estimated at 0.7 billion dollars (https://kse.ua/wp-content/uploads/2022/07/NRC_CLEAN_Final_Jul1_Losses-and-Needs-Report.pdf). Therefore, from our point of view, the evaluation of the possibilities of using and increasing the tourism potential of Ukraine in the context of the prospects and challenges of the post-war period should be carried out taking into account both the state and trends of pre-war development and post-war consequences.

In order to understand the existing strengths and weaknesses of the pre-war tourism potential of our state in comparison with the nearest neighbors - the countries of Western Europe, we used the indicators of the World Economic Forum as part of the assessment of the Tourism and Travel Index (Fig. 2).

Figure 2. The consequences of the COVID-19 pandemic for the Ukrainian tourism*



Source: built on the basis of (The Travel & Tourism Competitiveness Report 2019: Travel and Tourism at a Tipping Point 2020).

Therefore, the biggest weaknesses of the tourism sector of Ukraine are air infrastructure, as well as natural and cultural resources. As for the aviation infrastructure, this is one of the most problematic aspects of the post-war recovery of the domestic tourism sector. Firstly, at the moment, the total amount of damage to the aviation industry of Ukraine is already estimated at 57.3 billion hryvnias (airports and aviation equipment) (https://kse.ua/wp-content/uploads/2022/07/NRC_CLEAN_Final_Jul1_Losses-and-Needs-Report.pdf), and secondly, the forced stoppage of air transport activities leads to personnel losses in the industry, which will also be impossible to quickly fill in the post-war period. This situation is particularly negative in the context of the fact that 63% of inbound tourists arrived in Ukraine by airliners (Report on the results of the survey "Conducting quantitative studies of inbound tourism at checkpoints across the state border" 2022).

With regard to natural and cultural resources, in this aspect, it is worth noting the peculiarities of the applied assessment methodology, according to which the number of objects included in the world natural and cultural heritage of UNESCO and the share of protected natural territories (national parks, nature reserves, etc.) are taken into account. Taking into account the fact that as of the end of 2021, there were only 7 such objects in Ukraine (0.6% of the global number), of which only 4 are located entirely on the territory of the state (Malenkov

2021). According to such an assessment approach, our country has little chance of getting higher scores according to the indicated indicators. Even taking into account the possibility of including 17 more objects on the UNESCO list, which are currently on the preliminary list, Ukraine will not be able to significantly increase the score on the parameter of natural resources.

In addition, according to the parameter of cultural resources, the authors of the index evaluate the share of international business meetings (summits, forums, meetings of international organizations, etc.) in each country, which, taking into account the rather ill-conceived international communications of the Ukrainian authorities for several years before the large-scale invasion and transformation of Ukraine from subject into an object of international policy, did not give chances for obtaining higher points according to the specified parameter.

On the other hand, the strengths of the domestic tourism sector include the level of development of tourist services and tourist infrastructure, the level of prices, as well as indicators of the development of hygiene and the health care sector - the ability to provide qualified medical assistance to tourists in case of need. Since the possibility of infection with infectious diseases is taken into account in the parameter of health care, the significant spread of COVID-19 affected their importance around the world, and Ukraine was no exception.

Thus, before the start of a full-scale war on the territory of Ukraine, its tourism sector was characterized by a fairly high level of competitiveness in terms of price level parameters, development of tourist infrastructure and health and hygiene among Western European countries, although in other parameters it was significantly behind in development. Nevertheless, according to a survey conducted by the State Agency for Tourism Development (SATD) at the end of 2021 ((Report on the results of the survey "Conducting quantitative studies of inbound tourism at checkpoints across the state border" 2022), 29% of incoming tourists chose Ukraine for vacation, recreation and leisure.

Another important point in matters of the post-war restoration of the tourism potential of Ukraine is the fact that since the beginning of the full-scale military aggression, objects of the cultural and tourist sphere from 14 oblasts have been damaged (Report on the results of the survey "Conducting quantitative studies of inbound tourism at checkpoints across the state border" 2022), among which Dniprovsk, Donetsk, Zhytomyr, Zaporizhia, Kyiv, Luhansk, Mykolaiv, Odesa, Sumy, Kharkiv, Kherson and Chernihiv should be included as the most affected regions. At the same time, about 30% of the territory of Ukraine - precisely within the limits of the specified regions - is mined, according to the notification of the State Emergency Service (<https://dsns.gov.ua/>), which automatically makes them dangerous for many years of the post-war period, and this is, in fact, the entire sea coast of the country, which, at least, excludes the possibility of a full restoration of beach tourism in the coming post-war season.

On the other hand, the regions whose tourism facilities were practically or not at all damaged have been able to maintain the vital activity of the tourism sphere and even quite successfully: taking into account the situation that developed in the country in 2022, tourism enterprises made only 18% less of tax payments to the budget compared to the previous year (Tourism statistics of Ukraine. State Agency for Tourism Development). It is clear that such a situation has occurred mainly due to the forced relocation of a significant number of Ukrainians from the regions of hostilities, however, domestic tourism has not stopped functioning.

Consequently, currently Ukraine has quite high prospects for the post-war restoration of inbound tourism, at least to tourist regions bordering the European countries, and at most to the north-western and central regions. However, it is possible provided that further active hostilities and destruction of tourist facilities will not spread to the specified territories. At the same time, it should be stated that prolonging the war for years will only deepen the crisis in the tourism sector and will delay the prospects of restoring Ukraine's former tourism potential, not to mention its expansion.

Thus, today it is necessary to develop at least two possible strategic options for the further functioning of the business both at the level of the state and at the level of operating enterprises of the tourism sector, based on the following considerations:

- the active phase of the war will last until the end of 2023 at most;
- the war will develop into a long, multi-year conflict with periodic reductions in hostilities.

In the first case, when developing strategic development plans, one should focus on the advantages that Ukraine currently has - extremely wide representation in the world mass media, support of key public figures and celebrities, growing interest in Ukraine and admiration of the Ukrainian people, etc. in order to use all available information sources and platforms for reporting on places of interest, cultural and artistic objects and achievements, to popularize tourist Ukraine.

An important aspect of the work in this direction should be the improvement of the infrastructure of the border regions bordering the EU countries. And we are not only talking about the quality of roads and the

availability of related infrastructure - gas stations, food and accommodation facilities that are sufficient in the western regions, but primarily about ensuring the uninterrupted supply of electricity to checkpoints to avoid the formation of queues when crossing the border. The speed of crossing the border is a key condition for the development of automobile inbound tourism from the European countries.

Based on the assumption that the war in Ukraine will not end during the next year and will develop into a protracted conflict, the main task of the state in the context of, if not development, then at least supporting the vitality of the tourism sector will consist in the formation of clear criteria for safe tourism, the formation of interactive multilingual maps with interesting routes through conditionally safe regions and locations, marked areas of shelters, points of uninterrupted power supply and facilities and institutions capable of functioning in blackout conditions. The higher quality and more functional their content, the higher the chances of attracting the interest of a foreign tourist.

As for the business entities of the tourism sphere of Ukraine, the most critical protracted war will be precisely for travel agencies. A further decline in the level of the population's ability to pay and significant restrictions on the departure of men abroad will further reduce the demand for outbound tourism. Under these conditions, those economic entities that can arrange appropriate shelters, create conditions for autonomous power supply of the institution (object) in blackout conditions, provide interesting, extraordinary experiences and routes, etc. - will be able to attract and serve both foreign tourists and internal organized tours.

However, business operating in the field of rural tourism will receive significant prospects for development. The high level of stress and tension actualized the desire of Ukrainians to rest away from big cities and systematic air alarms. Therefore, the intensification of efforts in the direction of improving rural tour products, aimed at combining differentiated offers aimed at satisfying the most important needs for consumers, can become a key driver of the active development of rural tourism in Ukraine during the war, and in the future, that is, in the post-war period, even take a significant share of the country's tourism market

Conclusion

Ukraine's tourism potential is extremely significant, although it has been far from fully utilized before the full-scale invasion due to various reasons. Fighting on the territory of the country and large-scale destruction, including objects of cultural and artistic heritage and tourism, have caused significant damage to the tourism sector of only certain regions, while in the vast majority of regions of the country, primarily critical and transport infrastructure have been affected.

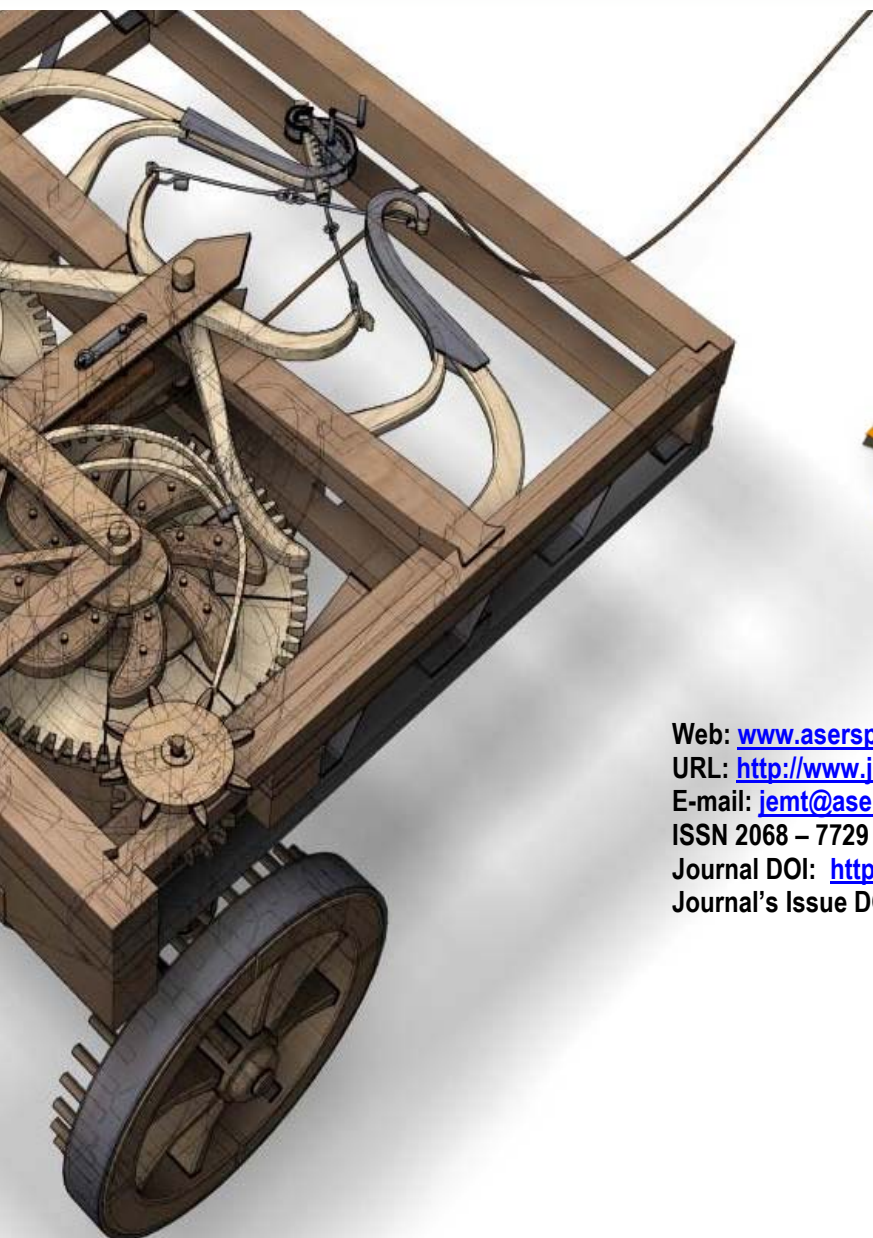
The greatest challenge to the tourism sector at the moment is the uncertainty regarding the duration of the war and its final consequences. This requires the search for possible options for strategic decisions both for the state and for individual subjects of the country's tourism sphere, aimed at ensuring the preservation and maximum effective use of the tourist potential for each variant of the development of the situation. In any case, only complex interaction and joint efforts of the state, local self-government bodies and representatives of the tourism business will help to overcome the challenges, preserve the country's tourism sector during the war and ensure its rapid recovery after its end.

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