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O impacto da guerra no sector do turismo da Ucrânia: Desafios e implicações globais

Resumo. O artigo examina o desenvolvimento do sector do turismo no contexto da guerra na Ucrânia. Considera os desafios globais para a atividade turística no contexto de um desequilíbrio de segurança e analisa a sustentabilidade e a adaptabilidade do turismo na Ucrânia no contexto do início das hostilidades. Também descreve as perspectivas e orientações para a revitalização e o desenvolvimento da indústria do turismo no período pós-guerra. O artigo tem por objetivo estudar o impacto da guerra na Ucrânia na formação de desafios globais no domínio do turismo, analisar a extensão dos danos causados, os problemas e as peculiaridades do desenvolvimento da indústria do turismo no contexto da guerra e avaliar a sustentabilidade socioeconómica da atividade turística e as perspectivas da sua recuperação no pós-guerra. Para a elaboração do artigo, foram utilizados os seguintes métodos de investigação: métodos abstractos e lógicos para sintetizar as abordagens científicas sobre o impacto da guerra no estado e no desenvolvimento do turismo mundial, métodos de sistematização para identificar os obstáculos e as ameaças à atividade turística em tempo de guerra e métodos de análise estatística para avaliar os indicadores de desenvolvimento do turismo a nível mundial e nacional. Para avaliar a sustentabilidade económica e social do turismo, o autor propõe uma abordagem própria que combina o método do índice e o método das séries cronológicas para comparar as taxas de crescimento dos indicadores económicos e sociais da indústria do turismo com indicadores semelhantes da economia no seu conjunto durante um determinado período. Os indicadores utilizados foram: indicadores sociais do desenvolvimento do turismo (número de empregados, salário médio) e indicadores económicos (vendas de serviços turísticos, investimentos de capital e rentabilidade). Os resultados da análise revelaram uma resiliência económica relativamente elevada do turismo na Ucrânia nos últimos seis anos, apesar da turbulência significativa associada à pandemia de COVID-19 e à guerra, devido à elevada mobilidade e adaptabilidade da atividade turística. A sustentabilidade social é comparativamente menor, uma vez que este sector recorre a numerosas adaptações do pessoal. Foi realizada uma análise SWOT da indústria do turismo na Ucrânia durante a guerra, o que nos permitiu identificar as principais barreiras e perspectivas estratégicas e direcções para o renascimento da indústria no período pós-guerra. O método de análise comparativa foi utilizado para avaliar o impacto de outros conflitos no turismo e as possibilidades de utilizar a experiência da recuperação pós-guerra (exemplos da Síria, Croácia, Israel e Geórgia). Conclui-se que o desenvolvimento do turismo no período pós-guerra dependerá da garantia de segurança no país e da atração de investimentos e de oportunidades de diversificação dos produtos turísticos em função das novas condições.

Palavras-chave: indústria do turismo. Gestão de crises. Impacto económico da guerra. Apoio internacional. Reabilitação das forças armadas da Ucrânia. Restabelecimento do turismo após a guerra.

The Impact of War on Ukraine's Tourism Sector: Global Challenges and Implications

Abstract. The article examines the development of the tourism industry in the context of the war in Ukraine. It considers global challenges for the tourism business in the context of a security imbalance and analyses the sustainability and adaptability of tourism in Ukraine against the background of the outbreak of hostilities.

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It also outlines the prospects and directions for the revival and development of the tourism industry in the post-war period. The article aims to study the impact of the war in Ukraine on the formation of global challenges in the field of tourism, to analyse the extent of the damage caused, the problems and peculiarities of the development of the tourism industry in the context of war, and to assess the socio-economic sustainability of the tourism business and the prospects for its post-war recovery. The following research methods were used in writing the article: abstract and logical methods to summarise scientific approaches to the impact of war on the state and development of global tourism, systematisation methods to identify barriers and threats to the tourism business in times of war, and statistical analysis methods to assess tourism development indicators at the global and national levels. To assess the economic and social sustainability of tourism, the author proposes an own approach that combines the index method and the time series method to compare the growth rates of economic and social indicators of the tourism industry with similar indicators of the economy as a whole for a given period. The indicators used were: social indicators of tourism development (number of employees, average salary) and economic indicators (sales of tourism services, capital investments and profitability). The analysis results showed a relatively high economic resilience of tourism in Ukraine over the past six years, despite significant turbulence associated with the COVID-19 pandemic and the war, due to the high mobility and adaptability of the tourism business. Social sustainability is comparatively lower, as this sector uses numerous staff adaptations. A SWOT analysis of the tourism industry in Ukraine during the war was conducted, which allowed us to identify the main barriers and strategic prospects and directions for the revival of the industry in the post-war period. The comparative analysis method was used to assess the impact of other conflicts on tourism and the possibilities of using the experience of post-war recovery (examples from Syria, Croatia, Israel, and Georgia). It is determined that the development of tourism in the post-war period will depend on ensuring security in the country and attracting investment and opportunities to diversify tourism products by the new conditions.

Keywords: tourism industry. Crisis management. Economic impact of the war. International support. Rehabilitation of the Armed Forces of Ukraine. Restoration of tourism after the war.

El impacto de la guerra en el sector turístico ucraniano: Retos globales e implicaciones

Resumen. El artículo examina el desarrollo de la industria turística en el contexto de la guerra en Ucrania. Considera los retos globales para el negocio turístico en el contexto de un desequilibrio de seguridad y analiza la sostenibilidad y adaptabilidad del turismo en Ucrania en el contexto del estallido de las hostilidades. También esboza las perspectivas y orientaciones para la reactivación y el desarrollo de la industria turística en el periodo de posguerra. El artículo pretende estudiar el impacto de la guerra en Ucrania en la formación de retos globales en el ámbito del turismo, analizar el alcance de los daños causados, los problemas y peculiaridades del desarrollo de la industria turística en el contexto de la guerra, y evaluar la sostenibilidad socioeconómica del negocio turístico y las perspectivas de su recuperación en la posguerra. Para redactar el artículo se utilizaron los siguientes métodos de investigación: métodos abstractos y lógicos para resumir los planteamientos científicos sobre el impacto de la guerra en la situación y el desarrollo del turismo mundial, métodos de sistematización para identificar las barreras y amenazas que se ciernen sobre el negocio turístico en tiempos de guerra, y métodos de análisis estadístico para evaluar los indicadores de desarrollo turístico a escala mundial y nacional. Para evaluar la sostenibilidad económica y social del turismo, el autor propone un enfoque propio que combina el método de índices y el de series temporales para comparar las tasas de crecimiento de los indicadores económicos y sociales de la industria turística con indicadores similares de la economía en su conjunto durante un periodo determinado. Los indicadores utilizados fueron: indicadores sociales del desarrollo turístico (número de empleados, salario medio) e indicadores económicos (ventas de servicios turísticos, inversiones de capital y rentabilidad). Los resultados del análisis mostraron una resistencia económica relativamente alta del turismo en Ucrania durante los últimos seis años, a pesar de las importantes turbulencias asociadas a la pandemia COVID-19 y a la guerra, debido a la gran movilidad y adaptabilidad del negocio turístico. La sostenibilidad social es comparativamente menor, ya que este sector recurre a numerosas adaptaciones del personal.

Se realizó un análisis DAFO de la industria turística en Ucrania durante la guerra, que permitió identificar las principales barreras y, perspectivas estratégicas y direcciones para la reactivación de la industria en el período de posguerra. Se utilizó el método de análisis comparativo para evaluar el impacto de otros conflictos en el turismo y las posibilidades de utilizar la experiencia de la recuperación posbélica (ejemplos de Siria, Croacia, Israel y Georgia). Se determina que el desarrollo del turismo en el periodo de posguerra dependerá de que se garantice la seguridad en el país y se atraigan inversiones y oportunidades para diversificar los productos turísticos por las nuevas condiciones.

Palabras clave: industria turística. Gestión de crisis. Impacto económico de la guerra. Apoyo internacional. Rehabilitación de las Fuerzas Armadas de Ucrania. Restauración del turismo tras la guerra.

Como citar: Domyshe-Medyanyk, A.; Brenzovych, K.; Ronai, L; Domyshe, A. A. (2025). O impacto da guerra no setor do turismo da Ucrânia: Desafios e implicações globais. *Cenário: Revista Interdisciplinar em Turismo e Território*, Brasília, 13(1), e-56711, 2025. <https://.org/10.26512/rev.cenario.v13i1.56711>

INTRODUCTION

Wars that have been going on in the world for years disrupt global economic, social and security balances, leading to global energy, economic and humanitarian crises and accelerating climate change (Bartelson, 2021). War, especially a large-scale war, has many negative consequences that extend far beyond the war zones. In addition to the apparent destruction of infrastructure and humanitarian crises, conflicts create chain effects that affect the economy, society, and politics, even in remote regions. The ongoing war in Ukraine affects all aspects of tourism activity, from physical security to economic stability, which puts inevitable pressure on the development of the tourism industry (Barvinok & Barvinok, 2022). Tourism is an activity whose development is elastic to the manifestation of various crises (Atasoy et al., 2023).

The large-scale war unleashed by Russia against Ukraine has changed the global picture, created numerous risks and threats, and caused turbulent processes in the political, economic, and security spheres. Predicting the long-term consequences of these events is currently a difficult task (Hryhorchuk, 2023).

In these circumstances, the issues of the war's impact on the development of the global tourism sector, the assessment of the sustainability and adaptability of tourism in Ukraine in the context of recent events, and the identification of mechanisms to overcome crises that will contribute to the recovery of the industry after the conflict and Ukraine's integration into the global tourism space are becoming more relevant.

The article aims to study the impact of the war in Ukraine on the formation of global challenges in the field of tourism, analyse the extent of the damage caused, the problems and peculiarities of the tourism industry's development in the context of war, and assess the socio-economic sustainability of the tourism business and the prospects for its post-war recovery.

The consequences of war inevitably affect the development of the tourism sector. Often, wars cause political instability, weaken security systems, and trigger economic crises, destroying popular tourist destinations (Tan & Cheng, 2024). In some cases, battlefields and military heritage often become new tourist destinations for post-conflict regions. This can provide additional opportunities and competitive advantages for the affected areas and create preconditions for economic revival (Henderson, 2000; Williams et al., 2023). An example of alternative tourism is the development of military tourism, which forms a unique tourist product for people from different parts of the world and, at the same time, creates competitive advantages for the territories both during and after the war (Piekarz, 2007).

The impact of the military invasion of the Russian Federation into the territory of sovereign Ukraine on the development of the global tourism business and the new security challenges associated with it are being studied by many international organisations (World Bank, 2023), the EU expert community (European Commission, 2022), specialised tourism organisations (Statista, 2024; State Agency for Tourism Development, 2024; UNWTO, 2023; Roadgenius, 2024) and the scientific community (Williams et al., 2023; Tan & Cheng, 2024; Pandey & Kumar, 2022).

The war that Russia started against Ukraine in 2022 caused not only direct losses for tourism enterprises but also losses in related sectors of the European and global economy, including sports competitions, the hotel and restaurant business, the food industry, transport services, and entertainment (Atasoy et al., 2023; Bondarenko & Medvedeva, 2023). The military conflict in Ukraine at the initial stages of its unfolding led to a drop in the shares of European, Turkish and Egyptian travel companies (Pandey & Kumar, 2022).

Despite the war, tourism in Ukraine demonstrates high resilience and adaptability. Ukrainian scholars have considered ways and methods of adapting domestic tourism enterprises during wartime (Shevchuk et al., 2022). There are high chances for tourism recovery after the war using the experience of other countries (Myronov, 2023; Zarubina et al., 2022). There are forecasts that after the war, Ukraine will be among the five most popular tourist destinations in the world (Yermachenko et al., 2024; Boiko et al., 2024).

Domestic and foreign scholars propose various ways of adapting and solving the problems of tourism development in the wartime and post-war periods. Domyshche-Medyanyk et al. (2022) considered the development of alliances in Europe as one option for the organisation and development of tourism companies.

The problems of effective state regulation of tourism development in Ukraine during the war are highly acute and limit the adaptability of the tourism business. Improving the state regulation of the tourism business in the context of its revival after the war requires the development of effective strategies to support, stimulate investment and integrate sustainable development to ensure the industry's sustainable growth (Sira et al., 2022). The organisation of tourism activities in the territories should be based on the concept of strategic management with a synergistic approach, which involves the integration of various aspects of the industry to achieve common goals, which allows for creating competitive advantages and supporting the sustainable development of the industry (Domyshche-Medyanyk et al., 2024).

It is too early to set a date for the war's end, especially in eliminating all security threats to the region. However, a large flow of investment is expected in rebuilding Ukraine. The state and form in which Ukraine will emerge from the war may determine the region's tourism investment direction (Kozlowski, 2023). These investments should be accompanied by measures to ensure the security of the Ukrainian state, as well as individual industries and regions.

METHODOLOGY

The methodological basis was the use of the abstract and logical method to summarise scientific approaches to the impact of war on the state and development of global tourism, systematisation methods to identify barriers and threats to the tourism business in times of war, and statistical analysis methods to assess tourism development indicators at the global and national levels. To assess the economic and social sustainability of tourism, the author uses the author's approach, which combines the index method and the time series method to compare the growth rates of economic and social indicators of the tourism industry with similar indicators of the economy as a whole for a certain period. The indicators used are social indicators of tourism development (number of employees, average salary) and economic indicators (sales of tourism services, capital investments and profitability). A SWOT analysis of Ukraine's tourism industry during the war's conditions was carried out, which allowed us to identify the main strategic prospects and directions of the industry's revival in the post-war period. A comparative analysis method was used to assess the impact of other conflicts on tourism and the possibilities of using the experience of post-war recovery (examples from Syria, Croatia, Israel, and Georgia).

RESULTS

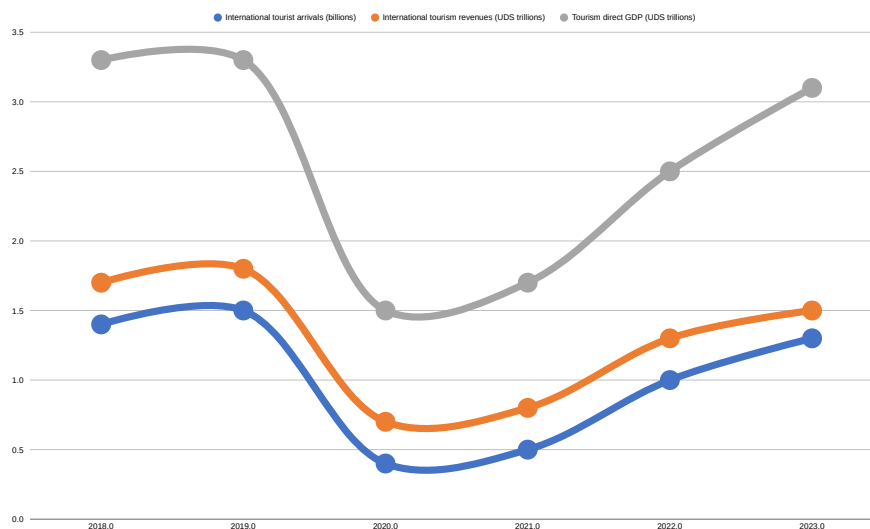
GLOBAL CHALLENGES TO TOURISM DEVELOPMENT IN THE CONTEXT OF THE WAR IN UKRAINE

Armed conflicts, wars, aggression, and terrorist acts are the most destructive trends of our time and cause severe damage to the development of global tourism (World Bank, 2023). Wars have political consequences: sanctions, termination of international agreements, reduction of international cooperation, and restrictions on consular services.

One of the most significant examples of recent years is the military aggression of the Russian Federation against Ukraine. This war has caused not only the destruction of infrastructure and human losses but also undermined the global security system. Russia's military actions against Ukraine, among other catastrophic consequences for the global economy and security, have caused severe destabilisation of the international tourism market, especially in Europe.

According to the World Bank, the war in Ukraine, which began in 2022, has significantly impacted the global tourism industry, which has only just begun to recover from the COVID-19 pandemic. At the initial stage of the war (first half of 2022), there was a significant decrease in international flight bookings (by 8%), an increase in tour cancellations (26%) and trip cancellations (12%) (World Bank, 2023). The war has also had a severe impact on outbound tourism from Russia and Ukraine, which make up a significant part of global tourism. In 2019, Russians made approximately 45 million trips abroad (4th in the world), generating USD 36 billion in tourism revenues. USD in tourism revenues with an average expenditure of USD 798 per trip. USD per trip. In 2019, Ukrainians made 29 million trips (7th in the world), generating USD 8.9 billion in tourism revenue. USD in tourism revenues with an average expenditure of USD 295 per trip. USD per trip. Outbound tourism and expenditures from Russia and Ukraine have been growing in the last decade in both absolute and relative terms (UNWTO, 2023).

In general, compared to 2019, in 2022, the overall decline in tourist arrivals was 34%, and compared to the previous year, 2021 saw a gradual recovery amid the lifting of anti-pandemic restrictions by 35%. Starting in the second half of 2022, after the initial shock of Russia's invasion of Ukraine, the global travel industry recovered and almost reached pre-pandemic levels by the end of 2023. Despite some recovery, the direct and indirect losses of the global tourism industry from the war in Ukraine are estimated at \$14 billion (UNWTO, 2023). The main trends in global tourism development in 2018-2023 are illustrated in Figure 1.



Fonte: Levantamento feito pelo autor (2024)

Figure 1. Critical indicators of global tourism development in 2018-2023

Source: compiled according to (Statista, 2024; UNWTO, 2023)

The data in Figure 1 show that the largest decline in the global tourism industry was observed in 2020 amid the spread of the COVID-19 pandemic and the introduction of administrative restrictions. Thus, in 2020, the overall decline in tourist arrivals decreased by more than 72% (1.8 billion), global tourism revenue by 61% (USD 1.1 trillion), and direct tourism GDP by 73% (USD 1.1 trillion).

The war in Ukraine has not significantly affected the volume of global tourism. However, it has created certain obstacles to its development and recovery (reorientation of specific tourist flows, revision of security policies, and change of air routes). At the end of 2023, there was only a slight lag in overall performance compared to 2023, and in 2024, it is even forecasted to exceed pre-pandemic indicators by an average of 2–3% due to the fulfilment of deferred needs (Roadgenius, 2024)

Analysing the dynamics of stock returns in the tourism sector in different parts of the world, Pandey and Kumar (2022) found that in the first thirteen days after the beginning of the Russian-Ukrainian war, there was a rapid decline in the shares of travel companies, primarily in Europe, Turkey and Egypt. There was a slight decline and fluctuation in other countries (USA, Canada). There were almost no significant changes in other parts of the world.

It is worth noting that the outbreak of war in Ukraine has given a significant impetus to developing such types of tourism as volunteer and military tourism. As emphasised by Bezuhla et al. (2022) the spring of 2022 demonstrated extraordinary activity in supporting the Ukrainian army, government, internally displaced persons and socially vulnerable groups. The war in Ukraine has united volunteers from all over the world, especially from European countries, the United States and Canada, in helping to fight the occupiers and reduce the manifestations of the humanitarian catastrophe.

Due to the flow of refugees from Ukraine to the EU, the need for humanitarian services has increased, which has often made it challenging to organise tourism. This led to a shift in government priorities and resulted in a reorientation of resources towards supporting refugees rather than developing the tourism industry. The tourism sector in many countries has assisted in accommodating, escorting and feeding Ukrainian refugees (European Commission, 2024).

Thus, although the war in Ukraine had significant negative consequences for many countries, it did not fundamentally affect the growth of global tourism, which began to recover after lifting restrictive anti-pandemic measures at the end of 2021. At the same time, the war has caused certain inconveniences and adjustments to the dynamics of inbound and outbound tourist flows to different countries, tourist logistics, and security. The countries whose tourism sector is closely connected with Russia and depends on Russian tourists have suffered the most due to restrictions for all Russians to travel to Europe and many other countries, economic sanctions that make it impossible to pay international bills and use Visa, Mastercard and other payment systems (Kozłowski, 2023). In addition, air carriers suffered significant losses due to restrictions on airspace over Ukraine and Russia, leading to longer air travel times, particularly in the Middle and Far East, higher fuel prices, and deteriorating air safety (UNWTO, 2023). Despite the difficulties faced by the global tourism industry in the context of the war in Ukraine, this sector has shown flexibility and high adaptability in the face of current turbulence.

THE IMPACT OF THE WAR ON THE TOURISM INDUSTRY IN UKRAINE

The full-scale war in Ukraine has dramatically changed society over the past almost three years, affecting all aspects of life, including the tourism sector. The tourism industry, which accounted for almost 6% of GDP and had already begun to recover from the COVID-19 pandemic, has been hit by a new devastating blow from the war (State Agency for Tourism Development, 2024).

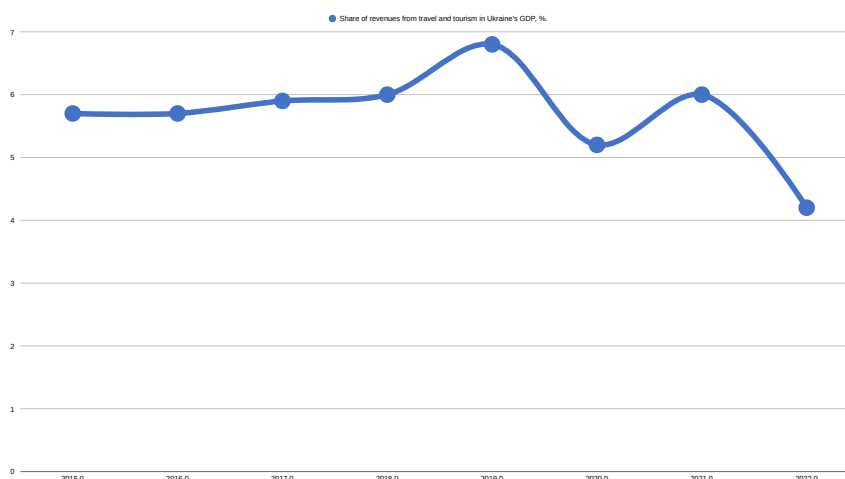


Figure 2. Share of the tourism sector in Ukraine's GDP

Source: compiled by the author according to the State Statistics Service of Ukraine (n.d.)

As shown in Figure 2, the tourism industry's contribution to the country's economy has been growing steadily over the period 2015-2019. Despite the Russian Federation's occupation of the Autonomous Republic of Crimea and the city of Sevastopol, which were prominent tourist destinations in Ukraine, and the ongoing military threat, tourism in Ukraine developed at a pace that was in line with global trends. In 2020, due to the pandemic and accompanying restrictions, the share of tourism in the country's GDP decreased from 6.8% to 5.2%. In 2021, there was a gradual revival of the industry (+0.8%), but in early 2022, in the context of the military invasion, the industry's share in the economy decreased by 1.8%.

According to the State Agency for Tourism Development, in 2022, revenues from the tourism industry to the state budget of Ukraine decreased by more than 30% due to the full-scale war. A significant reduction in tax revenues was observed in the following areas: tourist bases, campsites and children's holiday camps (-57%); tour operators (-35%); and travel agencies (-27%). In 2022, an increase in revenues of 46% was recorded only from the activities of boarding houses and hostels. This is because they were used as a temporary shelter for internally displaced persons who were forced to leave their homes due to the hostilities. In 2023, the situation did not improve. The tourism industry shrank by a third compared to the beginning of 2022. In particular, in the first three months of 2023, tax payments decreased by 29%, and the number of tourism companies decreased by 34% (State Agency for Tourism Development, 2024).

In the context of war and martial law, there are significant barriers to the development of tourism in Ukraine, in particular:

1. The security situation, namely the threat of shelling and the outbreak of hostilities, has significantly affected the volume of external and internal tourist flows (Barvinok & Barvinok, 2022). Thus, in 2022, compared to 2019, the number of entries of foreign citizens into the territory of Ukraine decreased by 83.2%, and the number of tourists departing from Ukraine decreased by 47%. Comparing the data for 2022 and the previous year, 2021, it should be noted that inbound flows decreased by 46%, while outbound flows increased by 5.5% (Figure 3).

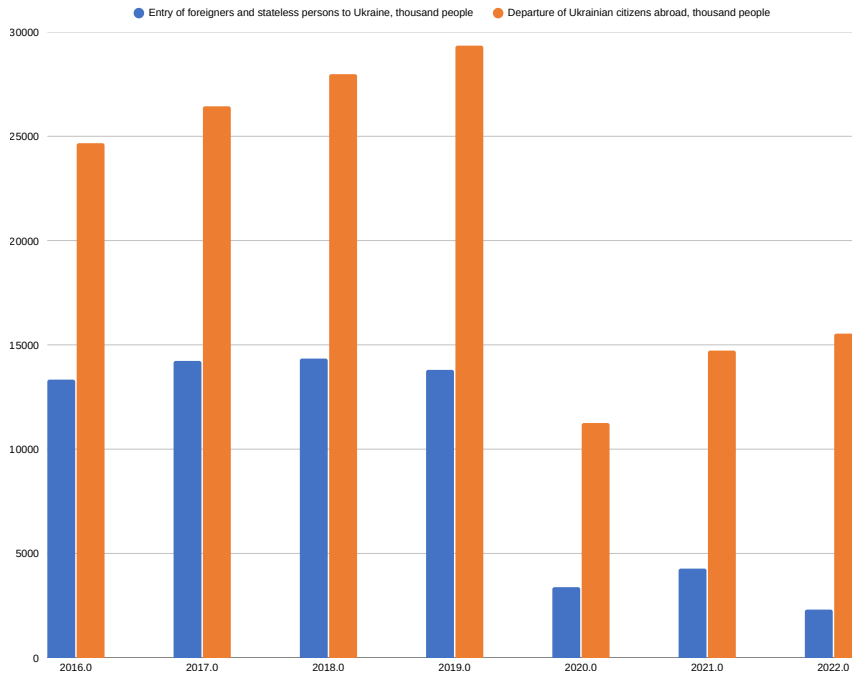


Figure 3. Dynamics of external tourist flows in Ukraine

Source: compiled by the author based on data Source: compiled by the author based on data from the State Statistics Service of Ukraine (n.d.)

The growth in outbound tourism in 2022 can be called conditional, as some people travelled abroad not for tourism purposes but to hide from the war temporarily. As of the end of January 2024, 4.9 million Ukrainians were living abroad because of the war. The overwhelming majority of refugees are women (the most significant share is women aged 35–44 – 13%) and children. As of January 2024, the largest share of Ukrainian refugees in Europe is in Germany (30%) and Poland (22%). Outside of Europe, the largest countries in terms of the number of Ukrainians accepted since the beginning of the full-scale invasion are the United States (280,000), the United Kingdom (253,200) and Canada (210,200) (Centre for Economic Strategy, 2024).

The structure of tourist flows by gender has changed significantly, as well as the goals of both inbound and outbound tourism. In 2022, due to the ban on men of military age crossing the state border, most outbound tourists were women and children. In terms of inbound tourism, in 2022, many inbound tourists were primarily volunteers, volunteers from other countries, representatives of international organisations, members of international delegations, and media representatives. Also, tourist flows within the country have changed significantly. Against hostilities and restrictions on access to eastern and southern, particularly the Black Sea, attractions, a significant part of tourist flows has moved towards the western and central regions of Ukraine (Shevchuk et. al., 2022).

2. Destruction of the infrastructure of tourist facilities, transport, hotels and cultural monuments, which formed a competitive advantage for developing tourism in the country and were of great interest to visitors. Before the war, Ukraine had over 500 museums, 65 historical and cultural reserves, and about 170,000 monuments, including seven UNESCO World Heritage sites (one located on the temporarily occupied territory). It is difficult to predict how much cultural heritage we will lose because of the war. According to the Ministry of Culture and Strategic Communications of Ukraine (Government Portal), as of 25 October 2024, 2109 cultural infrastructure sites have been damaged, of which 368 (17%) have been destroyed. According to the documented losses, 348 religious sites, 771 houses of culture/palaces of culture, 83 museums, 157 hotels/restaurants, and 8 sports stadiums were damaged in Ukraine (Centre for Economic Strategy, 2024).

According to UNESCO, the total damage in these areas is estimated at almost \$3.5 billion, and about \$9 billion is needed to restore them over the next ten years. As of 14 February 2024, the physical damage to Ukraine’s cultural and tourism sectors reached almost \$3.5 billion, up 40% from \$2.6 billion a year earlier. Among them:

- objects and buildings of historical value (losses are estimated at USD 2.41 billion);
- artworks, collections and cultural repositories (USD 161 million);
- buildings and workshops for the cultural and creative industries (USD 262 million);
- tourist facilities (USD 650 million).

Kharkiv region suffered the greatest losses, accounting for almost 25% of the total reported damage, followed by Donetsk region (14.7%) and Odesa region (7.6%) (UNESCO, 2024).

3. The economic crisis resulting from the hostilities has reduced household incomes and increased prices, making travel less affordable for the population. In addition, changing priorities of the population (the need to help the army, support internally displaced persons, and restore vital facilities) pushed tourism into the background (Barvinok & Barvinok, 2022). This has affected domestic demand for tourist travel.

4. Migration, namely the departure of the population abroad to evacuate from dangerous regions, has reduced the demand for tourism services in the country. The departure of a significant part of citizens, especially the economically active population, significantly reduces not only the domestic market for tourism services but also leads to a deterioration in the labour market (Centre for Economic Strategy, 2024). An additional burden is imposed by martial law in the country, which provides for the mobilisation of men of military age for military service, which also impacts travel planning and the labour market.

Today, under martial law, the tourism sector in Ukraine is characterised by the following features:

- travel company executives are primarily focused on volunteering, turning travel hubs into humanitarian or volunteer headquarters;
- bomb shelters or other protective structures must be provided on tourist routes and tourist sites;
- tourist routes avoid essential government and military facilities that could be targeted by Russian missile and bomb attacks;
- beach and walking tours are not possible due to active hostilities and minefields, which may take several years to clear after the war ends (Bazhenova et al., 2022).

In the context of the war, Ukraine has no safe regions, which significantly reduces the country's tourist attractiveness. Foreign tourists do not visit Ukraine because of regular artillery and rocket attacks, large-scale destruction of infrastructure, increased insecurity and the suspension of air travel. The hostilities have caused irreparable damage to the environmental safety of the territories, destroyed or occupied large areas of national parks and reserves, and a significant part of the territories is mined, which is unsafe for movement and will have long-term consequences for both the population and tourism development (Yermachenko et al., 2024).

Domestic tourism is also in a deep crisis, as people are forced to migrate from dangerous regions to relatively safer ones instead of travelling. In these circumstances, it is important to study the foreign experience of countries that have recovered from wars and civil conflicts, develop state strategies for adaptive support of tourism enterprises, and develop a comprehensive strategy for its revival after victory.

Analysis of resilience and adaptation strategies of the tourism industry in the context of modern security challenges and wartime turbulence

The economic sustainability of tourism enterprises can be defined as their long-term functioning with insignificant deviations of crucial economic indicators from the average values arising from external and internal factors. The critical characteristics of economic stability are ensuring sustainable growth of key economic indicators that determine the development of the industry, such as the volume of services provided, profit, profitability, and capital investment.

To evaluate the economic and social sustainability of tourism, the author proposes an author's approach, according to which the level of sustainability is defined as a comparative indicator of the growth rate of the economy (sales volumes, capital investments in the industry, the share of profitable enterprises in the industry) and social (number of employees, average wages in the industry) indicators with similar indicators of the economy as a whole for a certain period. This approach combines the index method with the time series analysis method, which allows for determining the level and direction of fluctuations in the industry according to a particular set of indicators compared to other types of activity over a certain period. The level of sustainability of the tourism industry by individual indicators is determined using appropriate formulas:

1. Assessment of single sustainability indicators:

(1)

- Comparative assessment of the sustainability of the tourism industry according to indicator for the period .

– is the index of growth of the industry indicator in period t, compared to the previous period

– is the indicator of growth on average in the economy in period t compared to the previous period.

Single indicators of sustainability demonstrate the level of fluctuations in the industry by a certain indicator under the same conditions as in other industries over the same period of time, as well as the vector of such fluctuations, which characterises the industry's adaptive capabilities.

2. Assessment of aggregate indicators of industry sustainability:

2.1. A function of type can represent economic sustainability:

(2)

economic sustainability of the industry;

comparative sustainability of the industry's production (operations);

the comparative stability of the industry's investment support;

comparative stability of the industry's profitability.

2.2. A species function can represent social sustainability:

(3)

social sustainability of the industry;

– comparative stability of employment in the industry;

comparative stability of the average salary in the industry.

According to this approach, the industry can be partially sustainable (based on single indicators demonstrating a positive value) and generally sustainable if the conditions set out in formulas 2 and 3 are met.

To assess the social and economic sustainability of tourism in the context of relative stability (2017–2019), the COVID-19 pandemic (2020–2021), and war (2022–2023), we selected statistical data and calculated growth indices of the main social and economic indicators, which are presented in Table 1.

Table 1. Indices of stability of economic and tourism development in Ukraine for the period 2017–2023

Source: calculated by the author according to the State Statistics Service of Ukraine (n.d.)

Indicators	Clarification	2017	2018	2019	2020	2021	2022	2023
Number of employees, people	on average in the economy	1,00	1,05	1,06	0,99	1,00	0,84	0,99
	in the tourism industry	1,04	0,95	1,22	0,79	1,01	0,69	0,98
Average salary, UAH	on average in the economy	1,37	1,25	1,18	1,10	1,21	1,06	1,17
	in the tourism industry	1,42	1,18	1,15	0,90	1,42	1,10	1,31
Production volumes, thousand UAH	on average in the economy	1,23	1,20	1,06	1,05	1,35	0,75	1,22
	in the tourism industry	1,20	1,41	1,34	0,52	2,14	0,20	1,48
Capital investments, thousand UAH	on average in the economy	1,27	1,31	1,11	0,77	1,33	0,63	1,51
	in the tourism industry	2,48	2,12	0,34	0,53	1,24	1,02	0,62
Profit, thousand UAH	on average in the economy	1,34	1,13	1,30	0,78	1,88	0,57	1,45
	in the tourism industry	0,83	1,50	1,17	0,44	4,47	0,29	2,01

Source: calculated by the author according to the State Statistics Service of Ukraine (n.d.)

Analysing the data in Table 1, it can be concluded that, in general, since the outbreak of hostilities, the tourism sector has outperformed the overall economy in terms of specific indicators of social stability. In particular, despite a 31% reduction in staff in 2022 compared to 2021 (the overall reduction in the economy in the first year of the war was 16%), there was an increase in wages (+10%) in 2022 and +31% in 2023. These rates are 4% and 14% higher than the average for this period, respectively. Economic indicators of the industry show mixed trends that differ significantly by year. For example, in the first year of the war, sales of services in the industry decreased by 80% compared to 2021, and in 2023, they showed an increase of 48%. Similar trends are also observed in business profitability. In terms of capital investment, the volume of capital investment in the industry grew by 2% before the outbreak of war and decreased by 48% in 2023. This process is the opposite of the average situation in the economy. In general, the indices indicate the high economic adaptability of the tourism sector, as over the two years of war, most indicators (except for investment) have shown a tendency to recover and grow.

To determine the industry’s social and economic sustainability, we used formulas (1, 2, and 3) and the data in Table 1. The results of calculating single indicators of the industry’s economic and social sustainability are shown in Figure 4.

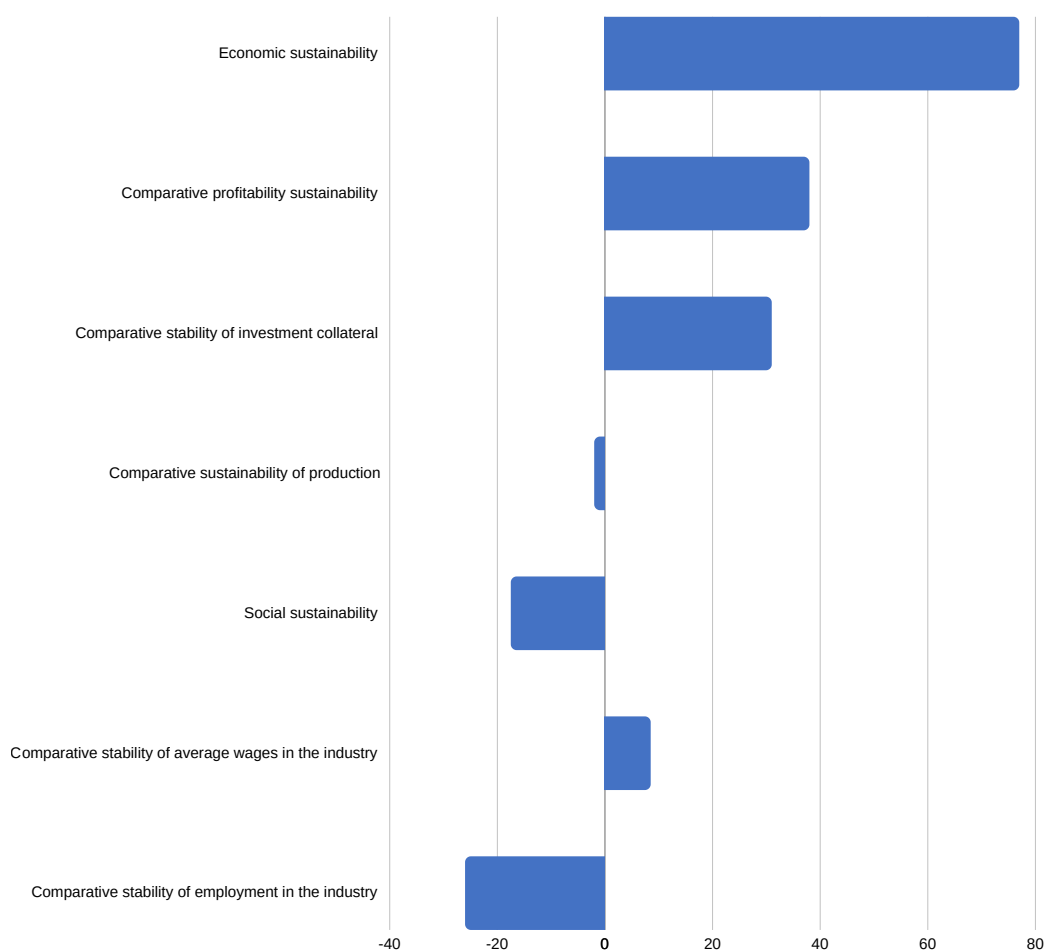


Figure 4. Indicators of comparative economic and social sustainability of the tourism business in Ukraine for the period 2017–2023

Source: calculated by the author based on Table 1

The indicators presented in Figure 4 illustrate the cumulative effect of the dynamics of the tourism sector’s advance and/or lagging development during the period under study compared to the average fluctuations of these indicators in all industries. The calculations have confirmed the relatively high economic resilience of the tourism industry in Ukraine in the face of the turbulence of recent years. This is primarily due to the industry’s resources’ relatively higher adaptability and mobility. The social component proved less resilient, primarily due to the numerical adaptation of personnel in the face of change.

The Ukrainian tourism business is concentrated mainly in Lviv, Ivano-Frankivsk and Zakarpattia regions. Travel companies offer excursion routes, including museum visits, castles, and short-term holidays in the mountains. The tourism industry in Lviv, Ivano-Frankivsk and Zakarpattia regions adapted to the martial law by reorienting tour routes to the western regions of the country and the newly created communities. This helped to include new tourist attractions such as eco-farms, family estates of famous people, and little-known natural attractions. This led to the creation of specialised tourist destinations, which provided additional sources of revenue for local budgets and supported the existing structure of the tourism sector (Shevchuk et al., 2022)

War tourism is also one of the newest areas of tourism that have emerged in the context of war. The Visit Ukraine website offers a selection of tours called “Brave Cities”, which includes nine routes through the cities most affected by the full-scale war. They include “Unbreakable Kharkiv”, “Strong and Invincible Bucha and Irpin”, and “Unconquered Mykolaiv”. These trips provide an opportunity to feel the resilience of the local population. The tours are led by professional guides who are familiar with emergency procedures (Visit Ukraine. Today, 2024) Thus, despite the war, Ukraine’s tourism industry continues to operate, but it needs support from the population, the state, and international partners more than ever. Developing recovery strategies for the affected regions is essential, particularly by creating special economic zones and research and production parks.

Ukraine’s international partners, neighbouring countries, through cross-border cooperation mechanisms, and international organisations, play a significant role in supporting the development and restoration of tourism in times of war. An example of successful implementation of cross-border projects despite the war in Ukraine is the Carpathian Euroregion, which brings together 15 regions of Ukraine, Poland, Slovakia and Romania. The project involves cooperation in economy, culture, education and tourism. The project implements measures to develop sustainable tourism, attract investments and grants in this area, hold seminars and information support, provide charitable assistance, and restore infrastructure (Euroregion “Carpathians Ukraine”, n. d.).

Based on the research, a SWOT analysis matrix was developed to compare external and internal opportunities and threats to the development of the tourism industry in Ukraine during the war and the post-war period (Table 2).

Table 2. SWOT analysis of tourism development in Ukraine during the war and post-war

Strengths	Weaknesses
<ol style="list-style-type: none"> 1. Ukraine's uniqueness in historical, cultural, geopolitical and environmental aspects. 2. Availability of various recreational, cultural and historical resources that allow for the development of a tourist and recreational complex. 3. High level of adaptability of the tourism business in turbulent conditions 4. Active implementation of digital technologies in the tourism sector and related areas 5. High opportunities for diversification and differentiation of the tourism product 6. Integrating business, the public, and other stakeholders in the context of war in the implementation of humanitarian and volunteer projects. 	<ol style="list-style-type: none"> 1. There has been a global decline in inbound tourism due to the ban on air travel to Ukraine and heightened security risks in various regions of the country. 2. Significant damage to tourist infrastructure, including hotels, museums, theatres, and historic buildings. 3. Insufficient availability of tourist information. 4. Outflow of investments from the Ukrainian tourism market. 5. The system of classification of hotels and other tourist accommodation facilities is outdated.
Features	Threats
<ol style="list-style-type: none"> 1. Creating a new image of Ukraine as part of the European community. 2. Use of the global information space saturated with news about Ukraine to promote the country's post-war tourism potential. 3. Developing an information and communication strategy focused on the international tourism market. 4. Creating conditions and mechanisms to attract investment in the tourism sector. 5. Diversification and personalisation of the tourism product, development of alternative tourism (event, military, volunteer, rehabilitation); 6. Developing a strategy to support the post-war recovery of Ukraine's tourism industry. 7. Increased demand for tourism and recreation services after the war 	<ol style="list-style-type: none"> 1. Continuation of the war, which could lead to even greater destruction and population loss; 2. The economic crisis, which creates obstacles to attracting domestic financial resources for the recovery and development of the industry; 3. Strengthening the image of Ukraine as a dangerous zone; 4. Destruction of transport and logistics infrastructure, which will make travelling and living much more difficult 5. Certain recreational areas and resources in Ukraine are long-term unsuitable for tourism development due to their mining, poisoning of soils and water bodies by chemical decay products, and environmental degradation.

Source: compiled by the author

The results of a SWOT analysis of development confirm that the recovery and advancement of Ukraine's tourism sector require a comprehensive strategic approach involving all stakeholders, including the state, businesses, international organisations, local authorities, and the public. Several promising directions can be identified for the post-war recovery of the tourism industry in Ukraine: development of inbound and domestic tourism; modernisation of tourism infrastructure; establishment of adequate institutional support for tourism activities; increasing foreign tourists' interest in memorial routes and landmarks associated with the wartime period; active promotion of Ukraine's tourism brand in international markets through marketing initiatives; development of modern educational programmes in the field of tourism and the improvement of existing ones; rehabilitation tourism for military personnel and inclusive tourism.

When planning the recovery of the tourism industry in Ukraine, it is essential to consider the experience of other countries that have successfully restored tourism after armed conflicts (Myronov, 2023). The experience of countries that survived the war and developed tourism to a new level confirms its essential role in economic recovery. These examples include Croatia, Israel, Georgia, and Syria.

During the war, tourism in Croatia almost reached a standstill, but after the conflict ended, a large-scale PR campaign promoting previously unknown regions helped revive it. The country's unique natural resources, including thousands of ecologically clean islands, have made it known as an attractive beach destination. Today, tourism accounts for about 15% of Croatia's GDP, significantly impacting the economy. Israel has demonstrated the ability to maintain its tourism status even in the face of ongoing conflicts. The industry is adapted to military risks and accounts for about 6% of jobs. The country compensates for losing tourism revenues from other sectors thanks to economic diversification. After the war with Russia, Georgia attracted the world's attention, and thanks to tourism investments, it increased its international status significantly (Zarubina et al., 2022).

An example of using the tragic experience of armed conflicts to create tourism products that draw attention to the region is the development of military tourism in Syria. After a long civil conflict and destruction, the country's authorities and entrepreneurs gradually integrated elements of the war's history into the tourism sector. The main aspects of military tourism in Syria include organising excursions to the sites of military operations and visiting destroyed cities, memorials, fortifications and historical sites that have been restored or left as living history. Tourists are offered routes that demonstrate the impact of war on the population and infrastructure and the history of the struggle to restore peace. In some cases, these tours include interactions with residents who share their personal stories and experiences of the war. With the restoration of the hospitality infrastructure and the gradual simplification of entry for foreigners, this approach has yielded results. For example, at the end of 2019, the tourism industry in Syria accounted for 11.4 per cent of GDP.

We cannot but agree with the scholars Kostynets et al. (2023) that in the future, in the context of Russia's continuing large-scale war against Ukraine, the efficiency of the tourism sector will largely depend on restoring the integrity of the tourism logistics system. This includes the organisation of passenger transportation routes, taking into account the demand for transport services and security requirements, the development of multimodal interregional and international cooperation, improving the logistical connectivity of domestic and international transportation, as well as restoring unimpeded movement of road transport in the regions affected by hostilities.

In formulating a strategy for the post-war recovery of tourism in Ukraine, we believe that the main trends in the global tourism environment that will determine the success of tourism business development in the long term should be considered. These principles include security, personalised differentiation of tourism products, digital content, sustainability, balance, integration, digital transformation and inclusiveness (Tso & Taqa, 2017).

Inclusive tourism and rehabilitation of people with disabilities have become extremely important both during and after the war, opening up new perspectives for Ukraine. The war has significantly increased the number of people with disabilities due to injuries, trauma and psychological consequences, which creates an essential need for accessible infrastructure, rehabilitation centres and specialised tourism services (Motsa et al, 2024).

In our opinion, in the period of post-war recovery, it is essential to have a differentiated approach to the formation of strategic areas of tourism specialisation in the regions by the tourism potential of destinations and the goals of their territorial development based on an assessment of the state of resource, infrastructure and natural potential of the regions, as well as the security situation after the war. The strategy should consider the existing tourist and other potential of the territories, the list of main tourist products by the territory's specific competitive advantages and history, transport and tourist infrastructure, and opportunities for developing related industries.

CONCLUSION

The war in Ukraine, although it had a significant negative impact on individual countries and the overall security situation on the continent, did not prevent the recovery of global tourism, which began after the lifting of pandemic restrictions in late 2021. At the same time, the conflict has created several challenges that have directly affected the tourism industry in Europe. In particular, tourist flows, logistics, security, and the economy as a whole have been affected by restrictions and changes. Countries dependent on Russian tourists and air carriers were most affected by the restrictions on airspace over Ukraine and Russia, which led to longer routes, higher fuel costs and deteriorating flight safety. Other sectors of the global economy suffered additional losses.

The war has significantly reduced Ukraine's tourist attractiveness due to constant shelling, destruction of infrastructure, suspension of air traffic and increased insecurity, which has significantly limited external tourist flows and investments. Significant areas of national parks and reserves are occupied or mined, posing long-term risks to tourism and the population; most of the most prominent tourist routes and cultural and historical heritage sites in the eastern and southern regions of Ukraine have been destroyed or severely damaged, and the country's transport and energy infrastructure has been destroyed. Domestic tourism is also in crisis, as people are forced to migrate to safer regions instead of travelling and surviving.

Despite all the difficulties and obstacles in the war, Ukraine's tourism industry demonstrates a high adaptive capacity, and its business representatives have the will to fight and survive. This is confirmed by the results of the analysis of the economic and social sustainability of enterprises and by the ability of businesses to diversify their activities and find new opportunities for development in the context of the war. Most of the tourism businesses have moved to the central and western regions, where the development of alternative tourism has intensified: ecotourism, green tourism, rehabilitation and medical tourism, and event tourism. The SWOT analysis revealed strategic opportunities for the development of the tourism industry in the post-war period, the implementation of which requires a comprehensive state approach and reform of the industry, creating conditions for attracting investment and ensuring the security of the territories. Adaptive areas of tourism development in Ukraine include using tourism industry infrastructure to accommodate temporarily displaced persons and converting certain sanatorium-type facilities into rehabilitation centres for combat veterans and inclusion centres.

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