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Tourism in wartime Ukraine – condition, restrictions and prospects

Abstract. The aim of the article is to present the current possibilities of travelling in Ukraine, shaped in the first year of the Russian-Ukrainian conflict, and the problems that the war caused in the Ukrainian tourism economy. The research method used was the analysis of selected secondary sources, including literature on the impact of crises on tourism, tourism industry reports and statistics on tourism in Ukraine. It was stated that, as a result of the war, international tourism in Ukraine decreased by as much as 90% and in the near future it will be very difficult to reach the pre-war number of visitors. There is still domestic tourist traffic, but it is subject to numerous and internally diversified restrictions. As a result, in 2022 there was a significant decrease in the size of the national tourist tax (by 24%) and budgetary revenues from the tourism economy (by 31%), despite the impressive increases in the above-mentioned categories in the western regions of Ukraine.

Keywords: tourism, crisis, war, Ukraine, Russia

Introduction

Before the beginning of the Russian aggression, tourism was one of the main branches of the Ukrainian economy. As it develops in the country, the transport infrastructure develops in parallel, and the ecological condition of the environment near tourist enterprises and recreational areas, as well as urban and communal infrastructure, improves. However, the tourism market is very vulnerable to crises of various origins, such as natural disasters, epidemics, socio-economic and political crises, military conflicts, which lead to destabilization of the situation inside the country (Kocak, Okumus and Altin, 2022, p. 2). So far most of the crises induced only short- or medium-term disruptions to global tourism (Cheer et al., 2021, p. 279), the COVID-19 pandemic was the first major challenge for tourism industry, widely described in scientific literature (e.g. Collins-Kreiner and Ram, 2021; Hu et. al, 2021).

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Nevertheless, modern world hasn't faced serious military conflict on a large scale, taking place in Europe and engaging more or less all countries crucial for international tourism. Such situation is extremely ominous for most tourism stakeholders, because global tourism is based on economic stability, unhindered mobility and open borders (Cheer et al., 2021, p. 279) – and all of those elements perished with the Russian invasion from February 24th. Tourism industry of Ukraine experienced a real collapse with the beginning of a full-scale war. In particular, a large number of tourist companies have closed or repurposed their activities, and hotels, sanatoriums and tourist bases are accepting refugees from the occupied territories. This situation is complicated by the fact that the sky over Ukraine is closed for domestic and international flights.

In AON 2019 Global Risk Management Survey, business interruption was ranked 4th among top 10 global threats for enterprises (AON, 2019, p. 15). This term covers all kinds of natural (mostly large scale) disasters and man-made situations, causing troubles in conducting businesses. The latter include wars, geopolitical conflicts, sanctions and political turmoil (AON, 2019, p. 5). It is also worth mentioning that the authors of the report indicated political risk (ranked 15th) as significantly underestimated, claiming that most respondents do not see it as an immediate threat, unless a major political event hits their region, causing direct damage to their businesses (AON, 2019, p. 8). This, in the context of war started in 2022, takes a special meaning. And so, in 2021 Global Risk Management Survey, business interruption was already ranked 2nd globally, and 1st in Europe and Asia Pacific regions (AON, 2021), what can be regarded as a result of the growing political tensions before the Russian invasion.

During the first month of the war, the losses of Ukrainian business exceeded the losses during the two years of the pandemic. According to Euromonitor International, it was estimated at the beginning of the conflict that global inbound tourism will lose USD 6.9 billion in 2022 due to the war in Ukraine (Bremner, 2022). Hotel experts in Turkey and Egypt expected a decrease in the volume of tourists from 60% to 70% for the 2022 season and note that the consequences will be felt for at least three to four years (Dvorska, 2022). The extent of the damage and the long-term consequences are difficult to assess, as the hostilities in Ukraine are still ongoing. For sure wars, even on regional scale, may negatively affect tourism and its development across large geographies, like, for example, Gulf War in 1991 and 2003 did (Türkay and Atasoy, 2021, pp. 15, 18). What is more, the outbreak of a conflict has strongly reduced the possibility of implementing the post-COVID-19 tourism recovery plans in countries involved (not only military) in the Russian-Ukraine struggle.

Research methods

The main purpose of this article is to present the current possibilities of travelling in Ukraine, shaped during the first year of the Russian-Ukrainian conflict (2022), as well as the problems caused by the war for the national tourism industry. The following research problems were adopted:

- 1) What restrictions for tourism are related to the current political situation in Ukraine and do they differ depending on the regions of the country?
- 2) What is the scale of the impact of the Russian-Ukrainian war on the Ukrainian tourism sector, measured by the size of budget revenues?

For that purpose the authors used secondary sources in the form of scientific literature (monographs and articles) on the impact of crises on the condition and development of tourism, reports prepared by various government agencies and organizations, as well as statistical databases on the volume of tourist traffic in Ukraine and Poland.

Research results

Since February 24, 2022, the inbound tourist flow of Ukraine has been lost by 85 to 90% (completely in the very first stage of war), business tourism has been frozen, and local tourism has turned into the movement of internally displaced persons, thus tourism in central, eastern and southern Ukraine has completely stopped (Westerman, 2022). Currently, there are no completely safe regions in Ukraine during the war, which has a direct negative impact on the country's tourist attraction, which is currently close to zero. Foreign tourists do not have the opportunity or desire to visit Ukraine due to regular massive artillery shelling and rocket-bomb attacks, significant destruction of infrastructure, given the increased danger in the light of military events and the suspension of air traffic. Considering the latter, it can be seen that the closure of Ukrainian airspace itself caused significant problems for carriers and airports. For example, in Poland, Ukraine was in the top ten in 2018-2021 (including even 4th place in 2021) in terms of the number of passengers served at airports by country in international regular traffic, and its share increased every year, reaching in 2021 7% of all travelers, doubling the value from 2018 (ULC, 2019; ULC, 2020; ULC, 2021; ULC, 2022a). In 2021, Kiev was the second city (after London) in terms of the number of passengers served at Polish airports in international regular traffic (almost 3.8% of total traffic), and the list of the 25 most popular connections also included Lviv (13th) and Odessa (25th) (ULC, 2022b).

The loss of international tourists is particularly severe, as it deprives the economy of around 2.5 billion USD annually (World Data, 2021). In 2021 there were almost 4.2 million of foreign tourists, which was as much as 130% of the value from pandemic 2020 (Westerman, 2022). This was still far from pre-pandemic time, with approx. 14 million visitors each year, but provided a glimmer of hope for the future. However, the war almost completely cut off Ukraine from international tourist traffic. It is worth remembering that before the pandemic, in 2018, as much as about 30% of foreign tourists in Ukraine were Belarusians and Russians (Lozynskyy and Kushniruk, 2020, p. 341) - currently, even with the normalization of the political situation, it is difficult to imagine that they will be interested in coming to this country and will be hospitably received by Ukrainians. For comparison, tourists from Poland accounted for less than 8% of foreign visitors to Ukraine in the same period (Lozynskyy and Kushniruk, 2020, p. 341), and comparing Ukrainian and Polish data, it can be assumed that 80% of

them were only one-day visitors (GUS, 2019, p. 107). The percentage of Polish tourists decreased even more (to approx. 4–6%) during the pandemic (GUS, 2021, p. 72; GUS, 2022, p. 74), which only proves how strong reorientation the tourist sector of Ukraine will have to make when the war will be finished.

However, despite the ongoing military operations in many regions of Ukraine and the established restrictions, the tourism sector continues to work in safe regions where there are no active hostilities. Tourism activity during the war has certain features that require additional consideration for analysis. Currently the sphere of tourism in Ukraine is defined by the following features:

- tourism business management is more focused on volunteering and turning tourist hubs into humanitarian or volunteer headquarters,
- bomb shelters or other protective structures must be provided on the tourist route,
- routes around important state and military facilities that may become targets of missile and bomb attacks by the Russian aggressor should be minimized,
- beach and walking tours are impossible due to the ongoing hostilities and the presence of minefields, the demining of which, according to forecasts, will continue for several years after the end of the war.

In addition, planning tourist trips has to be in accordance with the curfew. This is because in order to maintain law and order in the conditions of martial law, a curfew has been established in all regions of Ukraine. As a rule, it is valid from 23.00 to 05.00. That is why planning vacations or visits to certain locations should take this requirement into account. Crucial here seems to be observance of prohibitions, which include walks and excursions near critical or military infrastructure facilities, holding mass events, visiting forests, reservoirs and mountain routes in various regions of Ukraine, recreation in front-line zones and traveling through territories that are or were under occupation.

Note that each region has its own characteristics of recreation and tourist activities on its territory. For the most part, they are associated with certain restrictions that apply in certain regions (Table 1).

Interestingly, despite the losses suffered by the Ukrainian tourism sector due to the war, the amount of tourist tax for the first half of 2022 was UAH 89,420,000, which was almost 29% more than in the same period of 2021, when the budget received UAH 69,453,000 (Sira, Holubets and Bezruchenkov, 2022, p. 156). The city of Kyiv and four regions were among the top five in paying the tourist tax in that period. The capital increased the budget to more than UAH 20 million (increase of 5%). However, the largest increase compared to the same period in 2021 was recorded in the Lviv region (193%), from where UAH 19,774,000 came to the city budget. In the Ivano-Frankivsk region, the amount of the tourist tax increased by 76.4% (UAH 9,047,000). The income from tourism in Zakarpattia region amounted to UAH 8,872,000 (144% more than in 2021). The only decrease in that group was observed in Kyiv region, where UAH 4,694,000 have been allocated to the budget and it was 23% less compared to the first half of 2021 (DART, 2022). The largest increase in the first half of 2022 was recorded in seven regions, and – no surprise here – six of them are located in Western Ukraine. Excluding

Table 1. Features of rest and work of tourist sites in different regions of Ukraine

Region	Features
Kyiv city and regions: Kyiv, Cherkasy, Poltava, Volyn	It is forbidden to visit green areas and forests that are located outside the residential areas, rest is allowed near water bodies, the list of which is determined by the military administration.
Lviv	It is allowed to visit forests, but it is forbidden to move around them by transport. The exceptions are cases when a transit route runs through the forest or a person moves by bicycle. It is allowed to rest near water bodies, the list of which is provided by the military administration.
Zakarpattia	It is allowed to visit forests, except for part of the Carpathian Biosphere Reserve and the Uzhanian National Park, flights on single-engine aircraft are prohibited.
Ivano-Frankivsk	It is allowed to visit forests and mountains, it is forbidden to move around them in jeeps, ATVs, buggies and motorcycles. This ban also applies to the resort of Bukovel.
Ternopil	It is allowed to visit forests, but it is forbidden to light fires. All tourist attractions work as usual.
Vinnitsia	It is forbidden to visit forests, tourist activities near water bodies are allowed, except for those places that are located near infrastructure facilities.
Rivne	It is allowed to visit forests, pick mushrooms and berries, except for the territories that are located in the northern part.
Zhytomyr	It is allowed to visit forests, pick mushrooms and berries, except for the territories located 20 km from the border with Belarus. Those cultural institutions that have equipped shelters are allowed to work.
Khmelnitsky	It is allowed to visit forests with certain restrictions. Tourist attractions work as usual.
Chernivtsi	It is allowed to visit forests. Tourist attractions work as usual.
Mykolaiv	It is allowed to visit forest tracts determined by the military administration with some restrictions.

Source: own elaboration based on Mahdyk (2022).

the aforementioned Lviv, Ivano-Frankivsk, and Transcarpathian regions, the greatest growth compared to the corresponding period of 2021 was recorded in Ternopil (145%), Khmelnytskyi (116%), Kirovohrad (105%), and Chernivtsi (103%) regions (DART, 2022).

In the summer of 2022, an active phase of restoration of tourism in “safe” Ukrainian cities began, and on tourist sites of Ukraine you can see already available tours of historical cities. Travel agents of Ukraine have taken care of the safety of foreigners and provide recommendations for a safe stay in the country, transportation to a safe place and insurance that covers all the risks that are currently in Ukraine.

Unfortunately, the results of the tourism industry for the entire year 2022 were not as optimistic as those for the first half of the annum. It is hardly surprising, as the prolonged conflict not only excluded large parts of the country from tourist use, but also caused a significant reorientation of human priorities, including the people’s

consumption. In addition, it must be taken into account that the data for the first half of 2022 also included almost two complete months before the Russian invasion, i.e. a third of this period. The amount of the tourist tax in Ukraine for 2022 was 24% lower than in 2021 (almost UAH 179 million compared to UAH 235.5 million in 2021), which can still be considered a surprisingly good result, taking into account the political situation of the country. Drops were recorded in 14 of the 24 regions, mostly those with hostilities or under Russian occupation. Where the intensity of these activities was the highest, the size of the tax decreased the most drastically: in the regions of Kherson (by 95%), Mykolaiv (by 90%), Donetsk (by 83%), Luhansk and Odessa (by 80% each) (DART, 2023a). On the other hand, as a result of internal migrations of Ukrainians to the west of Ukraine, the regions of this part of the country (Lviv, Ivano-Frankivsk and Zakarpattia) recorded the largest increases in the amount of tourist tax paid, by 66-80% (the most spectacular was in Lviv region). Interestingly, the third largest increase (almost 68%) was observed in the Cherkasy region - probably because this is where the exodus of the population from war-torn Kiev and Trans-Dnieper Ukraine was directed (DART, 2023a).

Subsequently, the State Agency for Tourism Development (DART) has estimated the difference in budget revenues from the tourism industry between 2021 and 2022. It turned out that here the decrease was even more severe, amounting to 31%, and the number of taxpayers engaged in tourism activities decreased in total by 17% during the war year (DART, 2023b). Dividing budget revenues into entities responsible for them, it can be seen that the hotel industry was responsible for as much as 58% of the total amount from 2022. The largest decrease (57%) was recorded in the field of campsites and camps for children (DART, 2023b). Probably this is a result of fact, that in the face of warfare families did not want to make decisions about separation and leaving their offspring unattended. Taxes on travel agents and tour operators decreased by 27-35%, which is a reflection of the change in the consumption model in the times of war. The significant (by 46%) increase in tax revenues in the group of shelters and guesthouses may be surprising, but it results from the provision of temporary accommodation services to war migrants (DART, 2023b). It also did not have a major impact on the global size of budget revenues, as it was less than 9% of the total amount. Again, as in the case of the tourist tax, despite the general decrease, the western regions (Lviv, Ivano-Frankivsk) recorded an increase in budget revenues from tourism. However, it was not on such a scale and amounted to approx. 21–27% (DART, 2023b).

Today's reality is that full-scale hostilities on the territory of Ukraine lead to the restructuring of the entire tourism sector, and it is expected that after the end of the hostilities, new popular tourist destinations will appear. One of the directions of the restoration of the tourism sphere of Ukraine is the development of military tourism and dark tourism. Especially the latter offers vast range of opportunities, as – in Ukrainian reality – it may include variety of travels, linked with war or battlefield tourism, phoenix tourism, genocide tourism, death tourism, grief tourism and prison tourism (Tanaś, 2013, p. 156). In addition, tourists' attitudes towards death change generationally and

young tourists may find this type of offer much more acceptable and attractive (Tanaś, 2013, pp. 172–173) than classic military tourism, focused mainly on army, history and education.

Both, military and dark tourism, can be based on the same places, the decisive factor here will be the way of developing and leading the tourist narrative. From the perspective of the authorities and organizers of tourism, it is important to carefully lay out the accents and take into account the educational factor. The key element is to not deprive the visited places of emotional charge, but at the same time not allow its domination – primarily in the commemorative aspects (as the places of war are real, recent places of death and suffering), but also in the entertainment dimension (dark experiences combined with fun, without real death experience) (Tanaś, 2013, p. 191). Ukrainian tour operators already develop precisely these routes, inviting the cooperation of various tourism specialists: guides, travel agents, tour operators, as well as tourists themselves. All this was done so that foreign tourists would come to Ukraine and look at the destruction caused by the Russian army in Ukraine. A large number of people and world leaders have already visited Bucha, Irpin, Borodyanka, Gostomel, Chernihiv and Kharkiv, and a large number of journalists visit these cities almost every day. All this served as a great impetus for the development of such tours.

Conclusions

Undoubtedly, tourism in Ukraine is going through hard times right now. The isolation of large parts of the country, the constant threat of missile attacks or the suspension of air travels mean that foreign inbound tourism is almost non-existent, and it will be extremely difficult to rebuild it again, also for political reasons and the need to reorient in terms of the leading emitting countries (Belarus and Russia). Domestic tourism, on the other hand, is not helped by the severe destruction of infrastructure, migrations and awareness of the political and social situation of the country. Despite this, the tourism is functioning and the authorities encourage people to support – as far as possible – this sector of the economy. However, the effects of the existing restrictions are very visible, primarily in the size of tax and budget revenues related to the tourism industry.

Mariana Oleskiv, head of the DART, emphasizes that “after the war, tourism will change anyway. The approach to urban planning will change, it will be necessary to take into account moments with shelters at tourist sites, full-fledged plans for the evacuation of valuables should appear in museums” (Shvytkina, 2022). Oleskiv also notes that when Ukraine wins, it is worth inviting Ukrainians to go to those territories that have recently been liberated, where it is already safe. This will allow people to see the scale of the destruction and, perhaps, they will have a desire to join the reconstruction of these regions - this applies to foreign visitors as well, as their support will be of the greatest importance in providing money and international support for the rebuilding process. Moreover, according to Oleskiv, “it is important to understand that when traveling through Ukraine, Ukrainians will not only recharge and gain strength and inspiration for work, but also help [by paying the taxes and supporting national economy] the

Armed Forces” (DART, 2023b). In addition, such trips will allow to resume the work of accommodation facilities, restaurants, cafes in these areas as soon as possible (Visit Ukraine, 2022). The problem is not only in providing services and safety for tourists, but also in fact that many people in Ukraine do not consider going on vacation as something proper in current circumstances, while their neighbors suffer lack of water or electricity or sons sleep in trenches (Westerman, 2022).

Despite the difficult situation in the tourism industry in the post-war period, it should become a key in the strategy of economic recovery. However, Ukrainians need to work on this already today. In particular, it is necessary to include the development of tourism in post-war recovery programs, negotiate with world hotel chains on their entry into Ukraine, prepare a large-scale marketing campaign for foreign markets, develop tourism programs for places of military glory of the Armed Forces of Ukraine, work on the restoration of tourism infrastructure, promote non-standard tourism formats, and open national tourism offices in other countries.

There is no doubt that war conflict is one of the worst crisis experiences for tourism and its development. However, it can be treated as not only a threat, but also an opportunity, a kind of turning point and an impulse for change: in the creation and specialization of the offer, international cooperation or reorientation of the entire tourism policy, which, in the long run, may bring very beneficial and desirable changes for the sector and national economy. However, for this to happen, one condition must first be met: the armed conflict must come to an end.

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