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SOCIO-ECONOMIC SUSTAINABILITY OF THE TOURISM SECTOR ENTERPRISES IN THE CONTEXT OF THE COVID-19 PANDEMIC: GLOBAL AND UKRAINIAN DIMENSIONS

ABSTRACT

In 2020, one of the main negative factors affecting the development of the tourism sector was the COVID-19 pandemic. Complicating the economic situation due to the coronavirus crisis for developing countries and local communities that are disproportionately dependent on tourism threatens the growth of poverty in these countries, not to mention the possibility of developing the tourism industry on a sustainable basis. The article examines the situation in the tourism industry of Ukraine, which has arisen as a result of the spread of the COVID-19 pandemic, and analyzes the possibilities of recovery and development of the tourism industry based on sustainable tourism. Based on the analysis of statistical data and the study of the level and trends in the development of the tourism business at the global and national levels, the authors proposed practical directions for the recovery of the tourism industry in the context of COVID-19, which will be beneficial not only for Ukraine but for developing countries as well. It is shown that the crisis in the tourism industry, which arose as a result of quarantine restrictions to reduce the spread of the pandemic, has complicated the process of implementing the Sustainable Tourism Concept for countries with low economic performance. It has been proven that the further development of tourism in developing countries based on cooperation and consistency of measures is needed to regulate travel at the bilateral, regional and international levels, to ensure safety for travellers and workers. Bringing together the government, the public, and the business community to work on a practical and implementable plan to revive the tourism sector. Increasing investment in technology, green infrastructure and jobs.

Keywords: sustainable economic development, sustainable tourism, COVID-19 pandemic, tourist infrastructure, security, crisis, natural resources, cultural resources, competitive market, recreational load

JEL Classification: L83, O4, O5

INTRODUCTION

The ability of the tourism industry to ensure the development of key segments of social activity, in particular: sustainable economic development; social inclusion, employment and poverty alleviation; efficient use of resources, environmental protection; cultural values, historical heritage; mutual understanding, peace and security attracted close attention of specialists from various branches of knowledge to tourism (Podlepina, 2019).

At the same time, the tourism industry is one of the most dependent on external factors. At the mega-level, tourism is affected by "globalization processes"; "scientific and technological progress"; "informatization of society", at the meso level - "environmental and socio-economic development of countries"; "state support for tourism programs and grants"; "development of tourist image and brand of the country, regions and cities". At the macro level - "development of tourism infrastructure and general-purpose infrastructure"; "tourist safety"; "compliance of the tourist product with international standards, its competitiveness" (Which countries of the world have opened borders for Ukrainians? 2021).

At the same time, climatic cataclysms, military and political conflicts, changes in legislation, epidemics, and the financial crisis significantly affect the state and development of tourism and its investment attractiveness.

Thus, in 2020, one of the main negative factors that influenced the development of the tourism industry was the COVID-19 pandemic (Pogrebnyak et al. 2020).

Governments are trying to prevent the spread of the disease among their citizens by imposing significant restrictions on national and foreign mobility and introducing lockdowns and quarantines. Such measures, together with consumers' decisions to limit international travel, have led to a sharp decline in the tourism sector and serious economic consequences, especially for countries where the tourism sector is the mainstay of the national economy. In 2020, the number of international tourist arrivals decreased by 74% compared to the previous year (according to UNWTO). In most developing countries, the volume of arrivals decreased by 80-90%.

The beginning of 2021 was worse for most regions, with an 88% global average drop compared to pre-pandemic levels, although summer and autumn significantly improved the situation for some regions. The secondary effects of the tourism crisis are quite devastating, as workers and capital remain unused, and there is a lack of demand for intermediate goods and services, which negatively affects the development of many industries (Plaksiuk, O., et al., 2023).

Complicating the economic situation for developing countries and local communities that are disproportionately dependent on tourism threatens the growth of poverty in these countries, not to mention the possibility of developing the tourism industry on a sustainable basis.

Today, there is a considerable lag in the progress of measures to support the tourism sector in Ukraine, which poses a serious threat to the industry's competitiveness in the world market during the forecast recovery period (Tourist Barometer of Ukraine, 2020).

Therefore, the high importance of tourism and the need to develop the tourism industry on the basis of permanence, the exacerbation of the problems associated with the use of quarantine in order to curb the spread of COVID-19 set new challenges for researchers, not just to explore the problems of managing sustainable tourism, but to look for new opportunities and ways to restore tourism in the context of a pandemic, analyze new vectors of tourism development, given the basic provisions and principles of the sustainable tourism concept.

This is especially true for Ukraine, a country with enormous tourism and recreational potential, which is experiencing significant losses caused by quarantine measures in 2020-2021, but is optimistic for the tourism sector of the economy and its development on a sustainable basis because sustainable tourism is seen as a trend that leads to the management of all resources in a way that meets not only economic and social needs but also aesthetic ones while maintaining cultural identity, basic ecological processes, biodiversity and life support systems.

LITERATURE REVIEW

Domestic and foreign scholars have studied the factors that influence the development of the tourism sector and the problems of sustainable tourism development. In his scientific works, Daly (2021) explores global environmental issues in the context of sustainable development policy and points out the negative impact of transnational corporations on the interests of communities. Hulse (2007) emphasises the need to apply critical and analytical thinking when using the experience of decision-making on socio-economic development in order to avoid unproductive courses of action for the future.

In his conceptualisation, Cates (2012) argues that sustainable development is also a scientific and technological endeavour that can expand the contribution of knowledge to the environmental development of humanity worldwide. Based on the similarities and differences in interpretations, the scholar argues that one of the successes of sustainable development is its ability to serve as a great compromise between those who primarily care about the environment and nature, those who value economic development, and those who seek to improve human conditions.

Theobald (2010) analyses the problems and prospects of the tourism sector in order to anticipate the impact of tourism on modern society. The author provides an interdisciplinary international perspective on the important issues, challenges and opportunities facing the tourism industry.

James (2005) illustrates the major challenges and decisions faced by hospitality managers in balancing goals and resources with needs and opportunities in today's global marketplace, reflecting a rich combination of experience from international hospitality and travel consulting. The authors draw on their personal opinions to evaluate and critique contemporary tourism and predict the future of the industry.

Dwyer (2010) reviews the state of tourism economics, including demand, supply, forecasting, transport, taxation and infrastructure, provides a critical assessment of the existing literature and outlines issues for further conceptual and applied research.

Skare (2021) is one of the first to measure and assess the potential influence of the COVID-19 pandemic on the tourism sector globally. The author provides specific recommendations for tourism industry managers to assess the impact of epidemics on business and develop new risk management methods to combat the crisis.

Despite the available research, the topic remains relevant and requires a more thorough assessment of the impact of factors on the tourism business and the development of new management methods to tackle the crisis posed by the COVID-19 pandemic; identifying effective mechanisms that affect the degree of competitiveness of countries in the tourism industry.

AIMS AND OBJECTIVES

The article aims to explore the situation in the tourism industry in Ukraine and the world, which has developed as a result of the global spread of the COVID-19 pandemic, and to develop practical recommendations on the possibility of restoring and developing the tourism industry on the principles of sustainable tourism.

According to the defined goal, the main tasks are:

- assess the situation in the tourism sector during the emergency caused by the pandemic;
- on the basis of the conducted study of measures introduced in crisis situations to stabilize and restore the industry's potential, and to develop effective proposals for the further development of the tourism industry on the basis of sustainable tourism.

METHODS

The methods used to achieve the goal and solve the tasks were as follows: comparative analysis and graphic method - to reflect government measures to stimulate the recovery of the tourism sector, development trends and competitiveness of tourism activity; decision-making and a systematic approach - to carry out scientific research on the definition of modern approaches to strategic management in tourism, their features and methods of application are determined; methods of positive and normative analysis - to develop recommendations for the organization and improvement of measures aimed at supporting and restoring industry in crisis conditions.

RESULTS

On January 30, 2020, the World Health Organization (WHO) declared the COVID-19 outbreak a global emergency (World Travel & Tourism Council, 2021). In reaction to the coronavirus (COVID-19) pandemic, government authorities around the world have introduced measures and closed borders to limit the spread of infection and deaths. The restrictions on travel between countries have significantly slowed economic activity around the world.

Prior to the pandemic, the tourism industry (including its direct, indirect and induced impacts) provided 10.6% of all jobs (334 million people), with a contribution to world GDP of 10.4% (USD 9.2 trillion). Meanwhile, the cost of international visitors amounted to USD 1.7 trillion in 2019 (6.8% of total exports, 27.4% of world exports of services) (Economic Impact Reports, 2021).

According to the World Travel and Tourism Council's (WTTC) 2021 research, the tourism sector suffered losses of more than USD 4.5 trillion, and its contribution to GDP decreased to almost 49% compared to 2019; at the same time, the global economy fell by 3.7% of GDP in 2020.

In 2020, due to constant restrictions on mobility, the travel and tourism sector accounted for only 5.5% of world GDP. Expenditures of domestic visitors decreased by 45%, and international - by 69.4% (Daly, 2021, Yun Song et al., 2023). According to Zurab Pololikashvili - Secretary-General of the United Nations World Tourism Organization (UNWTO) on June 16, 2020, as a result of a decline in international tourism by 60% - 80% and a decrease in export revenues by 910 billion – USD 1.2 trillion, under threat there were more than 100 million jobs that are directly dependent on tourism (Pololikashvili, 2021). The most vulnerable were found to be women, young people, rural communities, indigenous peoples and informal

workers - the groups most often involved in micro and small tourism businesses. As for Ukraine, it is no exception. Tourists, resorts, recreational and healthcare facilities (camps, sanatoriums, boarding houses, health complexes) were among the most affected by the quarantine restrictions in the country, and have almost entirely ceased operations.

Ukraine's losses in the tourism sector are shown in Table 1 below, which compares data for 2019-2023.

Table 1. Characteristics of the Ukrainian tourism sector according to the WTTC. (Source: build by author Economic Impact Reports)

Indicator	2019	%	2022	%	Changes (%)
total contribution of the travel and tourism industry to GDP, USD million	10.0	10.4	7.7	7.6	-22.9
total jobs for travel and tourism, MN	334	10.3	295	9.0	-11.4
contribution of foreign tourists, USD million	3.2	3.7	0.71	0.9	-77,9
contribution of domestic tourists, USD million	7.3	...	2.3	...	-68.7

As can be seen from the table, the total contribution of the tourism industry to GDP decreased by 22.9%, primarily due to a decrease in the contribution of foreign tourists - 77.9%, and domestic tourists - 68.7%. The chart below shows the decline in tourist flows for 2019-2022.

According to the data for the first half of 2023, budget receipts from the travel industry have decreased compared to the previous year. However, for the six months from January to June 2023, the tourist tax in Ukraine amounted to UAH 85 million 471 thousand, while in 2021, budget revenues were only UAH 69 million 453 thousand. That is, despite all the negative factors, the country's budget in 2023 received almost 23% more money than in 2021. The tourist tax is paid according to the number of days guests stay at recreation centres, hotels and apartment buildings. The regional budget receives these amounts directly from taxpayers. The maximum amount for Ukrainian tourists was UAH 30, and for foreign tourists - UAH 300.

There are five regions with the largest amount of tourist tax payments and among them: UAH 20 million - Lviv region, which received UAH 100 thousand less (UAH 19.974 million) in the same period in 2022; Kyiv - UAH 14 million. However, this amount is significantly lower than in the first half of last year (UAH 20.5 million). Zakarpattia region - UAH 9.5 million, which indicates an increase in the western region's profit compared to the same period last year (UAH 8.728 thousand). In the Ivano-Frankivsk region, the tourist tax amounted to UAH 8.7 million, which is lower than in 2022 - UAH 9 million 470 thousand. In the Dnipro region, the hromada budget received more than UAH 5 million. This is a third more than in the first half of last year (about UAH 4 million). It is also worth noting three regions of Western Ukraine, where the tourist tax increased significantly in 2023: Chernivtsi region - UAH 419 thousand, Rivne region - UAH 111 thousand, Volyn region - UAH 253 thousand.

Data from the State Agency for Tourism Development indicate a significant decline in hotel prices in 15 regions of Ukraine. Due to the war in the country, the following regions recorded the largest decline in hotel prices: Mykolaiv region - 72%, Donetsk region - 91%, Kherson region - 98%, Luhansk region - 100%.

A significant decrease in budget revenues was recorded in the Zaporizhzhia, Cherkasy, Odesa, and Kyiv regions - about 30%, Kharkiv, Kyiv, and Ternopil regions - about 20%, Chernihiv region - 11.5%, Khmelnytskyi region - 6%, and Ivano-Frankivsk region - 3%.

The following chart shows the decline in tourist arrivals in 2019-2020.



Figure 1. The number of tourists served by tour operators and travel agents, by type of tourism in Ukraine in 2000-2020. Note: data for 2014-2010 do not include information on the temporarily occupied territories of the Autonomous Republic of Crimea, Sevastopol and the temporarily occupied territories in Donetsk and Luhansk regions. (Source: State Statistics Service of Ukraine)

Due to the impact of the pandemic, the economic and financial prospects of all countries are not optimistic. The uneven economic development of countries raises the question of how quickly and under what conditions the economies of countries and the tourism business will recover, taking into account the concept of sustainable tourism. The traditional principles of economic policy are sufficiency, fairness, efficiency, balance, dynamism and longevity as far as it's possible for developing countries, including Ukraine. The national economy of Ukraine, being part of the former USSR, has long developed on the principle of economic growth, which can be considered "consumer". The result of this development was numerous environmental, economic and social problems. At the present stage, Ukraine is guided by the concept of sustainable growth - the formation of sustainable tourism. However, the crisis caused by COVID-19 can greatly complicate this process. Implementation of the Concept of Sustainable Tourism is a rather difficult task in its practical implementation for countries with low economic indicators. This requires fruitful cooperation and a sequence of travel management measures at the bilateral, regional and international levels, ensuring security for travellers and workers. Combining the efforts of the government, the private sector and the public to work on a practical and feasible plan to revitalize the tourism sector. Accelerate the digital transformation and move to a low-carbon economy in the future. Increasing integration into technology, green infrastructure and jobs (Pololikashvili, 2021, Petraškevičius, 2022).

However, despite the seriousness of the situation, the crisis may become an opportunity for countries to rethink the development of tourism: tourism ecosystem, innovation and investment in sustainable tourism.

It should be understood that the sustainable development of tourism depends on the efforts that will be made by both government agencies and individuals. An important role will be played by the adoption, adaptation and application of relevant legislation, implementation of measures to protect the environment, support the financing of tourism projects, investment attractiveness of the tourism sector, skills of the industry, involvement of local communities, management efficiency (Osypchuk, 2014, Ruhana Zareen Gofran, Sotiroula Liasidou & Andros Gregoriou, 2023).

A significant role is given to the government, whose main task is to form a strategy and plan the development of the tourism industry based on the principles of sustainability, ensuring the study of recreational potential, initiating the development of certification systems, sustainable development indicators, monitoring the impact of tourism from social, environmental and economic points. The importance of making and implementing policy decisions to support the tourism industry is highlighted primarily through the need to tackle the crisis brought on by COVID-19 and the war. Much attention is paid to the specifics of ensuring business security in Ukraine in a state of crisis using artificial intelligence and cyber defence.

Efforts are currently being made at the global level to implement effective policy solutions aimed at preserving the tourism sector and fostering international coordination for the resumption of tourism. These decisions are constantly being discussed, including in the framework of the meeting of representatives of the G20 countries and the meeting of tourism ministers of the EU countries, which took place on April 24 and 27, 2020.

Table 2 below shows the measures taken by governments to stimulate the recovery of the tourism sector.

Table 2. Government measures taken by Ukraine, neighbouring countries and competing countries to minimize the effects of the COVID-19 pandemic. (Source: Tourist Barometer of Ukraine 2020. <http://www.ntoukraine.org/assets/files/ntou-statistics-barometer-2020.pdf>)

Country	Budget incentives as % of GDP	New loans and liquidity support	Deferment of payments on existing loans and collateral	Deferment of tax liabilities, their reduction or cancellation	Salary support
Germany	23	EUR 100 billion for direct recapitalization to ensure the solvency of companies. EUR 400 billion to guarantee that business protection will withstand liquidity problems. EUR 100 billion for refinancing.	Stabilisation of long-term interest rates through the European Central Bank, which are below market rates, depending on the rate and the business.	Deferment of tax payments and reductions in advance tax payments, corporate and trade taxes. Abolition of law enforcement measures/fines in case of late payment. Fully or partially abolish advance corporate income tax, value-added tax and personal income tax.	Extended access to short-term assistance in case of job loss. Extended benefits to help low-income parents. Expanding access to basic social assistance for unemployed people. Expansion and simplification of social assistance compensation programs.
Poland	12	25 billion zlotys (5.65 billion euros) were provided to support micro-enterprises in the form of interest-free loans. 50 billion zlotys (11.3 billion euros) - interest-free loans to support small and medium-sized enterprises; PLN 25 billion (5.65 billion) - loans for the purchase of securities to support large enterprises.	Payment of principal amount and interest on the loan. Extension of grace period from up to 6 or up to 12 months. Reduction interest rate on loans up to 0% for a period of no more than 1 year. Ability to discuss loan terms for every entrepreneur, regardless of business size.	Deferment of most taxes. Simplified forms and procedures for filing tax returns. The procedure of tax deductions has been accelerated.	Payment of wage subsidies for employees of institutions affected by the pandemic and non-employees: 50% of the minimum wage in case of falling volumes by 30%; 70% of the minimum wage in case of falling volumes by 50%; 90% of the minimum wage in the event of a fall in volumes by 80%.
Ukraine	No data available	For small and micro-enterprises, UAH 4 billion has been allocated to interest compensation on existing loans and the expanded program of affordable loans (5-7-9%). For providing loans under state investment guarantees - UAH 24 billion. UAH 1.6 billion to support the creativity of industry.	Introduction of a zero declaration and a tax on withdrawn capital. Abolition of total fiscalization with full implementation of RFT (Registrar of Financial Transactions) software.	The deadline for payment of land tax, land rent and real estate tax for April 2020 has been extended to 30 June 2020, and the same taxes for March 2020 have been cancelled.	Temporary unemployment benefits for people who lost their jobs as a result of the COVID-19 pandemic are paid in the amount of two-thirds of their salary for each reduced working hour, but not more than a fixed amount, namely the established minimum monthly wage; pensions and unemployment benefits have been increased.

Table 2 highlights the two main ways countries overcome the crisis: the first involves making credit lines available to businesses, and the second involves deferring payment of debt and tax liabilities.

It should be noted that countries with more developed economies and higher credit ratings rely mostly on affordable credit lines, realizing that this will restore the competitiveness of the national economy in the shortest possible time. These countries are paying more attention to the tourism industry; they can allow a guaranteed refund of the cost of booking tourist trips cancelled due to the COVID-19 pandemic.

Other countries with less developed economies offer deferred payment of tax and debt obligations, which may in the long run cause a negative chain reaction in the economy (long-term budget deficits, problems with overall solvency). In line with the forecasts from UNWTO (2024), international tourism is expected to fully recover to pre-pandemic levels in 2024, with initial estimates pointing to growth of 2 per cent over 2019 levels. This UNWTO flagship forecast remains dependent on the pace of recovery in Asia and the development of existing economic and geopolitical downside risks.

On 27 May 2020, the Government of Ukraine approved a program to support the economic recovery from the COVID-19 epidemic. The program covers the following areas: access to markets, modernization and development, access to finance, deregulation, and access to infrastructure. In general, Ukrainian tourism has not yet received from the government a consistent and systematic procedure for implementing measures by entities in the travel and tourism sector. Given the initiatives of the program (which are not operational measures, and their implementation will begin only after some time), it can be concluded that the pace of tourism recovery in Ukraine will lag far behind neighbouring countries and EU member states.

A significant backlog in the implementation of measures to support the tourism sector posed a significant threat to the industry's competitiveness in the world market during the forecast recovery in 2021 (Pogrebnyak, 2020, Frederick Dayour & Issahaku Adam, 2022). Some countries (Hungary, Croatia, Slovakia) are focusing on supporting domestic tourism, which will keep tourism contributions to the country's economy at the highest possible level. These countries are implementing programs of so-called "tourist cards" or certificates, through which citizens will be able to receive from the company partial compensation for recreation in the domestic tourism market. The HoReCa sector (hotels, restaurants, catering) received permission to resume work with restrictions in some European countries during May, however, subject to strict operating rules aimed at preventing the outbreak of a second wave of the pandemic.

Lithuania, a fan of the "soft response" method, for example, was one of the first to take a step in solving the problem and granted permission to restaurants and cafes to place their establishments on the territory of city squares and in public places. This simplifies the procedure for obtaining permits for the use of such sites and provides support for entrepreneurs in achieving a critical economy of scale. The resumption of the tourism industry will largely depend on vaccination and its quality, the lifting of travel restrictions between countries and the restoration of travellers' confidence.

According to the World Health Organization, the International Monetary Fund, the World Trade Organization and the World Bank, it is a rather difficult goal to vaccinate 40 per cent of the world's population by the end of 2020 and 60 per cent by mid-2022 (IMF, 2021). However, the expected benefits far outweigh the costs. Such an interesting model of tourism development related to the spread of vaccination was proposed during the United Nations Conference on Trade and Development, held in June 2021 (COVID-19 and tourism – an update United Nations Conference on Trade and Development, 2021). Table 3 shows the impact of vaccination on the industry's recovery.

Table 3. The impact of uneven vaccination from COVID-19 on the process of restoring tourism, (%). (Source: COVID-19 and tourism – an update United Nations Conference on Trade and Development, 2021)

Regions of the world	Reduction of inbound tourism	Decrease in GDP	Partial recovery	Uneven vaccination
South East Asia	-82	-8.4	-5.60	-7.10
Rest of South Asia	-77	-2.8	-2.00	-2.40
North European Union	-75	-2.7	-1.90	-1.90
East European Union	-70	-4.7	-3.30	-3.70

In some countries, vaccination is carried out more intensively than in others, so losses to the tourism industry are significantly reduced in most developed countries, but increase in developing countries, where the lack of mass vaccination deters tourists. Therefore, the most profitable settings are those countries with a high level of tourists and a high level of vaccination. The greatest burden is borne by developing countries.

Thus, on July 14, 2021, the Committee of Permanent Representatives of the European Union recommended adding Ukraine to the list of third countries whose citizens are allowed to enter the EU, regardless of whether they are vaccinated against coronavirus or not, or for what purpose they travel. The EU Council reviews such lists every two weeks for countries with low levels of coronavirus. However, each state of the European Union and the Schengen area has the right to decide for itself whether to implement this recommendation (Uvarova, 2021).

However, in the case of Ukraine, given the changes that are taking place under the influence of the military invasion, it is unlikely that we will see a significant influx of foreign tourists to the country. Nevertheless, tourism in Ukraine has great potential for development in products such as leisure and business tourism (MICE), as well as natural and cultural resources (e.g., gastronomy, rural tourism, medical facilities/wellness centres), but its development is significantly constrained by the lack of effective industry management, incorrect statistical coverage and high international competitiveness (Tourist Barometer of Ukraine 2020).

On the one hand, the lack of proper tourism infrastructure and the difficult situation resulting from the spread of the COVID-19 pandemic simultaneously create benefits for the development of the tourism industry on a sustainable basis.

According to research by Bondarenko (2016), Ukraine has enough competitive advantages over other countries, as it has a convenient geographical location, highly qualified medical personnel, and affordable cost of medical services, which is much lower than the cost of similar services in other countries.

On the other hand, as shown above, insufficient state attention to the tourism sector, insufficient efforts to overcome the tourism crisis caused by the COVID-19 pandemic, non-compliance with the regulatory framework for development as rural

green tourism, environmental infrastructure may lead to unattractive space for implementation tourist economic activity. The coronavirus crisis complicated, but did not eliminate the need to rebuild tourism on the principles of sustainability.

The sustainable development of tourism is a long-term direction in which it is possible to achieve a balance in achieving the goals of economic, social, cultural and environmental development, taking into account the interests of all interested parties based on the rational use of tourism potential and multilateral partnerships.

The economic function is to create a highly profitable sphere of activity, the reproduction of labour, which leads to increased productivity of social labour and includes, in addition, the accelerated development of social and industrial infrastructure in the affected areas. The social function of recreational and tourist nature management is to meet the specific needs of the population in recreation, health, and communication with nature, which contributes to strengthening the physical and moral health of society. The environmental function is to prevent the degradation of natural complexes under the influence of anthropogenic recreational tourism (Kondratyuk, 2013; Plaksiuk et al., 2023).

Consider the stages of regulation of the tourism industry for a clearer understanding of the mechanisms and objectives of implementing the principles of sustainable tourism, taking into account the conditions of the pandemic in Ukraine.

Stage I. Determining the tourist potential of the territory, which involves analyzing the availability of natural, historical and cultural tourism resources and the tourism material and technological base, as well as the level of their use.

Resort and recreational areas of our country occupy about 9.1 million hectares, which is 15% of the territory. The recreational resources of beaches, natural reserve funds, and speleology resources are of global importance in Ukraine. The state protects more than 70 thousand historical and cultural monuments. More than 12 thousand of them are definitely of interest to tourists around the world. Ukrainian castles, fortresses and monasteries are a unique historical and architectural phenomenon of Europe and the whole planet. There are hundreds of castles and fortresses in Ukraine that need restoration and repair. With the right investment policy, the entire Right Bank Ukraine can become the world's largest concentration of castles and fortresses. Ukrainian natural landscapes in general are characterized by a high level of aesthetic value that meets the needs of tourists. There are more than 63 thousand rivers in the country, including 9 large ones with a catchment area of more than 50 thousand km². Water tourist resources also include more than 8,000 lakes and estuaries with a total mirror area of 4,021.5 km². In addition, there are more than 28,000 ponds and 7 large canals with a total length of 1,021 km in Ukraine. All hydrological objects have a high degree of attractiveness and other valuable properties for the organization of recreation and tourism (Uvarova, 2021). Favourable climatic conditions and mineral waters, the operational reserves of which are 64,865.7 m³ per day, are also a powerful material basis for the organization of recreational activities in the country. For the needs of tourism in Ukraine, biosphere natural and ethnocultural centres, and various objects of the nature reserve fund are used, on the basis of which the national ecological and ethnocultural network is created as a fundamental structure of ecological tourism.

The Travel and Tourism Competitiveness Report published every two years by the World Economic Forum compares the competitiveness of 140 countries and measures a set of factors and policies to ensure the sustainable development of the travel and tourism sector (T&T); according to 2017, Ukraine took first place in the ranking of countries with the smallest share of the tourism industry in GDP, which amounted to only 1.5%. At a time when the tourism industry in world GDP is about 10% (Serednytska, Humenna, 2018). The key facts and scale of the Ukrainian tourism industry are shown in Table 4.

Table 4. Tourism in Ukraine - key facts. (Source: Tourist Barometer of Ukraine 2020)

Indicators	The value of the indicator
beds in accommodation facilities	300,000 (45% of which are hotels and similar objects)
tourists at border crossings	13 700 000 (2019 data)
tourists in accommodation facilities	7 000 000 (2018 data)
daily stay	17,700,000 (13% of revenues, data for 2018)
the share of foreign tourists	11% of daily stays (data for 2018)
international traveler's checks	1.5 billion USA dol. (2018 data)
total contribution of tourism to GDP	8.80% (2015 data)

There has been an improvement in the state of the tourism industry in Ukraine in the period before the COVID-19 crisis and after the significant decline following the events of 2014. Table 5 shows the dynamics of the global tourism competitiveness index in Ukraine over 10 years.

Table 5. Dynamics of the global index of competitiveness of tourism in Ukraine for 2009 – 2019. (Source: OECD Tourism Trends and Policies 2020; Dudchenko & Lyubitseva, 2020)

Indicator	Years, place in the rankings					Dynamics of changes for the period 2019/2009	Points (2019)
	2009	2011	2013	2017	2019		
business environment	100	76	114	124	103	-3	4,1
security	93	82	77	127	107	-14	4,8
health and hygiene	17	17	8	8	11	+6	6,5
human resources	80	68	65	41	48	+32	4,8
information and computer infrastructure	52	68	70	81	78	-26	4,5
tourism priority	96	101	84	90	92	+4	4,3
perception of tourism in the country	62	107	101	78	55	+7	3,7
price competitive ability	115	119	110	45	19	+96	5,9
environmental sustainability	83	88	92	97	114	-31	3,9
air transport infrastructure	98	93	78	79	71	+27	2,7
land transport infrastructure	84	74	73	81	77	+7	3,1
tourist infrastructure	62	53	50	71	65	-3	4,3
natural resources	104	119	102	115	116	-12	2,2
cultural resources	84	86	80	51	55	+29	1,9
general	77	85	76	88	78	-1	3,7

According to The Travel and Tourism Competitiveness Report, Ukraine is classified as a lower middle-income country (USD 996-3,895), which means lower and middle income. This classification corresponds to the World Bank's income classification based on gross national income per capita.

One of the key factors behind Europe's success as a tourist destination is its rich cultural resources, concentrated mainly in Southern and Western Europe. Before the pandemic, the large number of tourists who were attracted to these properties were provided with the most reliable tourist infrastructure in the world, with a particularly high level of hotel saturation. The high state of integration of the European market, and regulatory and tourism policies focused on the European Union and the Schengen area have led to the intensification of domestic and international travel.

Ukraine has a sufficient amount of available natural, historical and cultural tourist resources, but does not use all its potential. In 2019, Ukraine took 78th place in the ranking of countries. However, at the same time, Ukraine had the fastest growth rate of T&T scores in the subregion, rising by 10 positions. In particular, the stabilization and recovery of the economy contributed to the improvement of the business environment (from 124th to 103rd place), security indicators (127th to 107th), international openness (78th to 55th) and general infrastructure (79th to 73rd) (The Travel & Tourism Competitiveness Report 2019).

Stage II. Estimation of recreational capacity of the territory.

It should not be forgotten that tourism ranks fifth in terms of environmental impact (after industry, construction, transport and agriculture). The share of tourism in environmental degradation can be 5-7% (Kuchynska & Bomba). The main reasons for the negative impact of tourism on the environment are, first of all, excessive concentration of tourist traffic in time and space, uneven location of tourist infrastructure (often in places with the most valuable natural complexes), imperfect forms of recreation and lack of ecological culture of tourists.

Estimation of the recreational capacity of the territory is carried out to prevent the reduction of the effect of improvement and rest during the realization of tourist activity. In view of the recreational load, in order to prevent a decrease in the

quality of the environment in the tourist area, the recreational capacity of the area is determined, which is measured as the total number of people who can be there at the same time without harming the natural environment. Recreational capacity depends on the norm of recreational load, the area of the recreational area, the time of stay of tourists within it and the duration of the favourable period for rest (Muzychenko-Kozlovskaya, 2018). For example, according to the standards calculated in the IRR of the NAS of Ukraine, the average recreational capacity of tourist centres of coastal areas is 400 thousand people/year. According to the statistics of the Main Department of Statistics in the Odesa region, in 2016, 278,227 thousand people were served in tourist accommodation facilities. Thus, 69.56% of the potential was used. More than 30% of unused opportunities to attract tourists remain.

Regarding ecologically acceptable norms of recreational loads, in the world practice of recreational and tourist development of territories, the indicators of scientifically substantiated maximum possible number of people who can be in the given territory without causing degradation of natural ecosystems are widely used, although there are differences in load standards. Similar standards have been adopted in the United States, Poland, the Czech Republic, Slovakia, Hungary, Romania, Moldova and other countries. Scientists of the Institute of Regional Studies under the leadership of V. Kravtsiv and others have developed standards of recreational load on natural complexes, determined the maximum recreational load of natural complexes and objects within the nature reserve fund of Ukraine, etc. (Kondratyuk, 2013, Catherine Cheung et al., 2021).

Limiting the number of visitors is practised in the world tourism industry not only in natural areas but also in urban and historical sites. This approach is based on the definition of clear, scientifically sound limits based on the capacity of certain tourist facilities and the recreational capacity of natural complexes. In some countries, in addition to limiting the number of visitors, there is a high fee for staying in protected areas and the country as a whole. For example, in the Himalayas in the early 1990s, a decision was made to increase the fee for climbing Everest (Antonenko & Melnyk, 2018). Most national parks and reserves in Ukraine have a fixed fee for entry or entry into their territory, but usually, it is symbolic and does not cover the costs associated with eliminating the consequences of tourists. A striking example is the environmental tax on vehicles at the entrance to the Shatsk National Nature Park (on the route Lviv-Brest).

Quite common in the world is the method of "distracting" tourists from particularly valuable natural areas is the creation of various additional attractions. For example, in the estates, most environmental facilities create visit centres. Here comfortable conditions of rest are created, screenings of films about the nature of the park, thematic exhibitions and expositions are organized, and it is possible to get maps, guides and other literature. For many tourists, the availability of such facilities with appropriate comfort conditions eliminates the need to spend extra effort to visit remote natural areas. The new experience was gained by museums, galleries and information centres, which during the coronavirus crisis switched to virtual tours, video blogs on social networks and educational content.

Therefore, in order to prevent a decline in the quality of the environment in the tourist area, it is necessary to regulate the scale of tourist activity and limit them to the optimal value; payment for the use of tourist resources; differentiation of the amount of payment for resources depending on their value; effective partnership between state, central, regional, local, public and business organizations, as well as other stakeholders in the regulation of sustainable tourism development; joint but differentiated liability for violation of usage rules and conditions; integrated, programmatic, ecological, culturological approaches to planning and management of tourist activity (Podlepina, 2019).

Stage III. Marketing researches.

Marketing research is conducted in order to forecast the demand for services of tourism enterprises and reduce risk and uncertainty in their work. The market of tourist services functions, satisfying the effective demand of the population, which is created under the influence of objective conditions and subjective factors. For example, a set of environmentally friendly marketing which provides complete information about the features of the tourism sector increases attention to the natural, social and cultural environment of individual areas and customer satisfaction.

Objective conditions for the development of tourist demand are economic, socio-cultural, psychological, urban, political and environmental circumstances (Bochan, 2012). Subjective factors include the following: ethno-religious affiliation; age and sex; marital status, number of children; social category; place of residence; level and living conditions; profession and position; availability of free time; fashion and market conditions. Consequently, the demand for a tourist product is created under the conditions of a specific level and lifestyle of the population, it is subject to fluctuations, the rhythm of which can act as resource conditions of the territory.

The primary tasks of marketing research are the study of market conditions, research of competitors, and the study of consumers (Krykhovetsky, 2012, Ayham et al., 2023).

The development of a marketing strategy at the current stage should take into account the adjustments made by the coronavirus crisis. According to experts (OECD Tourism Trends and Policies, 2020; World Travel & Tourism Council), the main trends in the tourism sector during the coronavirus crisis will be:

- development and prevalence of local tourism and short trips;
- growing demand for independent (family) travel by private car and individual accommodation;
- sanitary and hygienic conditions and the ability to distance oneself during accommodation and recreation will become important competitive factors;
- consumers choosing shorter holiday periods and booking closer to the departure date;
- choice of health, marine and rural tourism (outdoor recreation, accommodation in recreational areas, replacement of ancillary facilities, rental of green spaces, individual houses in compliance with social distancing requirements and provision of necessary protective equipment);
- supporting the tourism industry development at the national and local levels. This will mitigate the negative effects of the COVID-19 pandemic and create a basis for improving the competitiveness of domestic tourism.

The practical realization of the demand for tourism infrastructure will depend on the ability to establish its operations under anti-epidemic restrictions. In order for tourism to start recovering, it needs to be revived by improving services and intensifying information campaigns, including:

- developing mechanisms to guarantee tourist losses from trip cancellations due to the spread of the epidemic by providing vouchers for cancelled bookings;
- depending on the degree of epidemic threat in the countries of outbound tourism, ensure the availability and reliability of information about possible travel restrictions and their cancellation;
- targeted spending of budget funds of the tourist tax for the development of local tourism, related infrastructure and improvement of the environment;
- conducting advertising and information campaigns to reorient consumer demand towards domestic tourism (World Travel & Tourism Council, 2021).

Stage IV. Formation of a list of possible measures for sustainable tourism development within the region.

Such measures may include regulatory and methodological support for tourism development, compliance with international law; allocation of tourism as a separate sector of the economy to improve not only statistical reporting on all types of tourism but also public administration and regulation (Muzychenko-Kozlovskaya, 2018, Гудков, 2021). After all, tourism, on the one hand, is affected by social and environmental problems and on the other - it can be their cause (Podlepina, 2019). This is especially noticeable at the local and regional levels. In this case, a certain area is considered unstable if the process of using its resources is ahead of the process of their recovery and if more waste is generated than processed or used for other purposes.

The action program may include:

- increasing the attractiveness of natural tourist resources and historical and cultural monuments through their rational and careful use, taking into account the recreational and psychological load;
- reconstruction and modernization of the material and technical base of tourism, including historical and cultural monuments;
- improving the quality of service by introducing mandatory certification of hotel and catering services according to international standards;
- creation of the necessary infrastructure and improvement of the existing condition;
- information support and advertising of tourism, especially outside the state, by forming a national system of information centres;
- development of tourism-related sectors of the economy, including in the field of entertainment;
- training of highly qualified new and advanced training of existing staff for tourism by expanding the system of specialized educational institutions and internships abroad;
- improving the quality of the environment (Yakushev, 2020);
- conducting educational activities on the careful treatment of nature and cultural monuments;

- education of a responsible attitude to nature by the population, especially within the territories with unique natural, historical and cultural resources;
- introduction of multilevel ecological and tourist education, promotion of a healthy lifestyle, prevention, treatment and maintenance of mental health and well-being, development of a system of tourist and recreational programs, holding ecotourism competitions (UNO: official website. Global Sustainable Development Goals);
- development of tourism education for members of the united territorial communities on sustainable development and sustainable lifestyle on the basis of tourism and environmental imperative (knowledge, education and beliefs) (Antonenko & Melnyk, 2018).

DISCUSSION

The study shows that most of the measures devoted to maintaining and restoring the industry in crisis conditions are based on providing available credit lines for business representatives and postponing the payment of debt and tax obligations (Tourist Barometer of Ukraine 2020). We agree with this approach to solving crisis problems and at the present stage, when building an action plan and measures to minimize the consequences of the crisis in the tourism sector of Ukraine, you should revise your priorities for the development of tourism and redirect them to maximize the preservation of the industry, as well as to redevelop and accelerate all internal activities (reorganization, legislative base, statistics). Moreover, the following considerations should be taken into account:

1. The complexity of forecasting the results of the development of international tourism.
2. The need to develop a flexible response plan through the existing possibility of new waves of the COVID-19 pandemic.
3. The recovery of the tourism industry will largely depend on vaccinations, the removal of travel restrictions between countries and the restoration of the trust of travellers.
4. The implementation of demand in the tourist infrastructure will depend on the ability to establish its activities in the context of anti-epidemic restrictions.
5. The need to preserve the national tourism industry due to the high percentage of domestic tourism in the overall tourism economy of Ukraine.
6. Ukraine's low budgetary potential, military operations in the country, the banking sector and the country's credit rating do not allow for substantial financing of the economy, and therefore the main tool to minimise the economic impact of the COVID-19 pandemic is to postpone tax and (to the extent possible) debt obligations.
7. The need for support of local air carriers by the state is not only a matter of preserving tourism but also a critical factor in ensuring overall mobility, especially given the state of other components of the national transport infrastructure.

Therefore, based on the analysis of statistical data and the study of the level and trends in the development of the tourism business at the global and national levels, the article offers practical directions for restoring the tourism industry in the context of the crisis, which will be useful not only for Ukraine but also for developing countries.

The priority direction of tourism development in Ukraine should not be to increase the number of facilities and their capacities, but to establish a competitive market of integrated tourist services.

CONCLUSIONS

The study shows that most measures aimed at supporting and restoring the industry in crisis conditions are based on providing affordable credit lines for business representatives and deferring payment of debt and tax obligations (Tourist Barometer of Ukraine 2020). We agree with this approach to solving crisis problems and, moreover, at the current stage, when building an action plan and measures to minimise the consequences of the crisis in the tourism sector in Ukraine caused not only by the pandemic but also by military actions, it is necessary to reconsider its priorities for tourism development and redirect them to maximise the preservation of the industry, as well as to re-plan and accelerate all internal activities (reorganisation, legal framework, statistics). Furthermore, to ensure that tourism contributes to the long-term economic and social well-being of the affected regions, sustainable tourism practices that prioritise environmental conservation, and cultural and community development should be applied. The following circumstances should be taken into account:

1. The difficulty of predicting the results of international tourism development.
2. The need to develop a flexible response plan due to the existing probability of new waves of the COVID-19 pandemic.
3. The recovery of the tourism industry will largely depend on vaccinations, the lifting of travel restrictions between countries, and the restoration of traveller confidence.
4. The fulfilment of demand in the tourism infrastructure will depend on the ability to establish its operations under anti-epidemic restrictions.
5. The need to preserve the national tourism industry due to the high percentage of domestic tourism in the tourism sector of Ukraine's economy.
6. Ukraine's low budgetary potential, the state of its banking sector and the country's credit rating do not permit it to count on significant financing of the economy, which means that the main instruments for minimising the economic consequences of the crisis are tax deferrals and (to the extent possible) debt repayments.
7. The need for state support for local air carriers is not only a matter of preserving tourism but also a critical factor in ensuring general mobility, especially given the state of other components of the national transport infrastructure.

While the war has devastated and continues to devastate local economies, tourism can provide a much-needed boost by creating jobs, generating income and fostering cultural understanding. However, the success of tourism in the post-war period depends on many factors, including the security situation, political stability, availability of infrastructure and the level of investment in the tourism sector, among others. Today, due to the unstable situation in Ukraine caused by the war, it is difficult to predict the further development of the industry, but it is no exaggeration to say that tourism will be one of the areas that will help the country survive the post-war crisis if the Ukrainian government applies the right marketing strategies in this area. The priority for the development of tourism in Ukraine should not be to increase the number of facilities and their capacity but to establish a competitive market for integrated tourism services on the basis of sustainability.

ADDITIONAL INFORMATION

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CONFLICT OF INTEREST

The Authors declare that there is no conflict of interest.

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СОЦІАЛЬНО-ЕКОНОМІЧНА СТАЛІСТЬ ПІДПРИЄМСТВ ТУРИСТИЧНОГО СЕКТОРА В КОНТЕКСТІ ПАНДЕМІЇ COVID-19: СВІТОВИЙ ТА УКРАЇНСЬКИЙ ВИМІРИ

2020 року одним із головних негативних факторів, що вплинули на розвиток туристичної галузі, стала пандемія COVID-19. Ускладнення економічної ситуації внаслідок коронакризи для країн, що розвиваються, та місцевих громад, які непропорційно залежать від туризму, загрожують зниженням доходів у цих країнах, не кажучи про внеможливлення розвитку туристичної індустрії на засадах сталості.

У статті розглянута ситуація в туристичній галузі України, яка склалася внаслідок поширення пандемії COVID-19, проаналізовані можливості відновлення та розвитку туристичної галузі на основі сталого туризму. На підставі аналізу статистичних даних, за результатами вивчення рівня й тенденцій розвитку туристичного сектора на глобальному та національному рівнях запропоновано практичні напрями відновлення туристичної індустрії в умовах COVID-19, що стануть у пригоді не лише Україні, але й країнам, які розвиваються.

Продемонстровано, що криза індустрії туризму, яка виникла внаслідок карантинних обмежень, запроваджених із метою недопущення поширення вірусу, ускладнила процес упровадження Концепції сталого туризму для країн із низьким рівнем економічних показників. Обґрунтовано, що для подальшого розвитку туризму в країнах, які розвиваються на засадах сталості, потрібні співпраця й послідовність заходів щодо регулювання на двосторонньому, регіональному та міжнародному рівнях, забезпечення безпеки для мандрівників і працівників; об'єднання зусиль уряду, приватного сектора та представників громадськості в роботі над створенням і реалізацією практично орієнтованого плану з поживлення туристичного сектора; збільшення інвестування в технології, зелену інфраструктуру та робочі місця.

Ключові слова: соціально-економічний розвиток, сталий туризм, криза, туристичний сектор, пандемія COVID-19, туристична інфраструктура, безпека, конкурентоспроможний ринок, рекреаційне навантаження

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