

PROSPECTS FOR THE DEVELOPMENT OF TOURIST ENTERPRISES IN THE CONDITIONS OF MODERN CHALLENGES

ПЕРСПЕКТИВИ РОЗВИТКУ ТУРИСТИЧНИХ ПІДПРИЄМСТВ В УМОВАХ СУЧАСНИХ ВИКЛИКІВ

The article highlights the development of the tourist services market in wartime conditions in Ukraine. It has been noted that the full-scale Russian invasion left a negative impression on the Ukrainian tourism industry: the closure of many tourist enterprises, the disability to work for airports, massive missile attacks, depressed emotional and moral state of people who want to travel safely. It has been analyzed that nowadays tourism in Ukraine does not stand still, many tourist enterprises have resumed their work since the summer of 2022. The study provides an explanation of the adaptation of tour operators to the new requests of tourists and the resumption of cooperation with travel agencies, insurance companies, and hotels for the well-being of our country. Possible strategies that will help tourism enterprises (tour operators, travel agents, carriers, etc.) adapt to modern conditions and successfully resume or continue their work have been considered, namely: cooperation with foreign consolidators, development of tours available to Ukrainians, formation of opportunities for experience's exchange, more active interaction with state authorities.

Key words: tourist service, tourism in the conditions of military operations, touroperating, strategies for the development of the tourist market, prospects for the recovery of Ukrainian tourism.

У статті розглянуто розвиток ринку туристичних послуг в умовах сучасних викликів. Визначено негативні ефекти повномасштабного вторгнення на українську індустрію туризму: призупинення роботи багатьох туристичних підприємств, закриття аеропортів та інфраструктурних об'єктів, пригнічений емоційний та моральний стан населення, що бажає подорожувати безпечно. Проаналізовано, що на сьогоднішній день туристичні підприємства в Україні адаптуються до умов невизначеності та переорієнтації потреб клієнтів туристичної сфери, тому багато суб'єктів туристичного бізнесу відновили свою роботу ще з літа 2022 року. Надані пояснення щодо того, яким чином туроператори (Elaine Tour, Join Up, Accordtour та інші) пристосувалися під нові запити туристів та продовжили працювати разом з турагенціями, страховими компаніями, готелями для забезпечення рекреаційних потреб туристів і відновлення економіки України. Розглянуто можливі стратегії, які допоможуть туристичним підприємствам (туроператорам, турагентам, перевізникам, закладам розміщення та харчування) у довгостроковій перспективі спланувати прибуткову діяльність в умовах сучасних викликів: співпраця з іноземними консолідаторами, розроблення турів, доступних для українців, формування можливостей обміну досвідом, активніша взаємодія з органами державної влади. Проведено SWOT аналіз ринку туристичних послуг України, на основі якого сформовано пропозиції щодо відновлення туризму в Україні в умовах війни для туроператорів, турагентів, органів державної влади, перевізників, закладів харчування та розміщення. З огляду на кінцеву мету всіх зазначених заходів, а саме – формування в'їзних потоків, просування якісного національного туристичного продукту, створення атрактивного туристичного бренду України – відновлення туристичної діяльності є важливим, оскільки туризм має комплекс властивостей, які дозволяють вирішити соціально-економічні проблеми, реалізувати культурно-освітньої функції туризму, створити підґрунтя для післявоєнного відновлення країни.

Ключові слова: туристичний сервіс, туризм в умовах військових дій, туроперейтинг, стратегії розвитку туристичного ринку, перспективи відновлення українського туризму.

UDC 338:242

DOI: <https://doi.org/10.32782/bses.86-37>

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Formulation of the problem. During 2022, Ukrainian tourism faced a number of threats and adverse factors that negatively affected the tourism industry in Ukraine. However, despite all this, the tourist market does not stand still, but gradually recovers, improves and develops. Today, the topic of the development of the tourism industry during military operations is relevant, because this industry is associated with large cash receipts to the state budget due to the inbound and outbound trips of tourists, which is why it is necessary to plan ways to restore the development of the tourist services market.

Analysis of recent research and publications. Many researchers are engaged in the study of the development of the sphere of services, including tourism, in Ukraine. For example, researchers Sak T., Bilyo I., Tkachuk Y., Taranenko G., Posokhov P. and Lupashko A. conduct research studying the

impact of the war on business in Ukraine, analyze the damage and how to work easily and productively in such a difficult time [1; 3; 4; 5]. Data from the official websites of tour operators, where details and all the news of their work are indicated, were also analyzed [6; 7; 12; 13; 14; 15; 17].

Aim of the study is to determine promising strategies for the development of the Ukrainian tourist market, to analyse national tourist services market of Ukraine, to make propositions for the restoration of the market of tourist services in the conditions of military operations.

1. Suspension of work, reorientation, use of available resources by tourism market operators for urgent needs

The full-scale Russian invasion had a negative impact on all spheres of Ukraine's economy, including tourism. Military operations have reduced the tourist attractiveness of our country, the safety of tourists and

their protection from risks. The entire tourism industry stopped its work at the time of the beginning of armed aggression from the Russian Federation.

Some tour operators reoriented themselves and began to use their available resources for volunteer activities. For example, the tourist operator "Accordtour" in Terminal-A (organization of departure of the tour operator's own buses), where tourists' journeys always started, housed people who were forced to leave their homes from all over Ukraine! [6]. TO "Join Up" (Figure 1), with the participation of airlines and competent state institutions: the Ministry of Foreign Affairs of Ukraine, the Ministry of Infrastructure of Ukraine, the State Agency of Tourism and Resorts of Ukraine – developed an action plan for the evacuation of those people who were on vacation abroad. Free special flights were made in cooperation with the Ministry of Health of Ukraine to transport tourists, epidemiologists were present on planes and buses and express tests were available to check passengers [7].

2. Partial restoration of work

Some tourist operators closed their companies and did not resume their activities, some started to work partially already in April-May of the same year. For example, the largest tour operator in Ukraine "Join Up" is one of the first to resume work [7]. Contracts with various travel agencies, carriers, airline and insurance companies, hosting parties for Ukrainian tourists were renewed. All the funds of the clients who did not go on the trip were frozen and an opportunity was created to use them for the next trip. In the summer of 2022, as a sign of gratitude for the protection of the Ukrainian land, the "Sea for

servicemen" project (Figure 2) was launched – this is the first recovery program for the military since the beginning of a full-scale war [7].

Some travel agencies gradually began to resume work for tour operators. Due to frequent mass rocket attacks and the departure of some travel agents abroad, many travel agencies currently work online, only a few have open offices. It was found that this has its pros and cons, because there is an opportunity to provide a tourist service from anywhere in the world, but on the other hand, not all people want to buy a tour online and there is a distrust of such travel agents.

3. Departures from other cities and transfers to places of departure

Until February 2022, the vacation of most Ukrainians began by calling a taxi or driving their own car to the airports of Ukraine (for example, the international airports "Boryspil", "Lviv" named after Danylo Halytskyi, "Odesa", etc.) registration, flight and arrival on the dream vacation . Currently, Ukrainians can travel in two options:

- by bus;
- travel to foreign airports and a flight to a tourist destination.

Citizens of Ukraine can get to the airport of another country by ordering a transfer from a tour operator, in their own car or by buying a bus ticket on the desired route. Tour operator "Join Up" [7], online services Busfor and Infobus [8, 9] are considered leaders in terms of price and quality in this direction.

The most popular among Ukrainians are flights from Chisinau International Airport in Moldova, Rzeszów – Jasionka International Airport (RZE)



Figure 1. Emblem of tour operators that cooperate with other tourist enterprises

Source: [6; 7]



Figure 2. Emblem of the project "Sea for servicemen"

Source: [7]

and Krakow International Airport (KRK), Poland. This is due to the fact that the airports of these cities are the closest to travel. Popular "low-cost" airlines in Europe are Wizz Air and Ryanair [10; 11]. On the wings of these airlines that our citizens often fly.

The data of the State Border Guard Service show that since the beginning of the full-scale war, the difference between those who left and entered Ukraine amounted to 2.7 million people. Most of them – 2.4 million – are citizens of Ukraine, the rest are foreigners. It is interesting that in March and April of 2023 the number of Ukrainians who returned to the Motherland exceeded the number of those who left (Figure 3). But already from May 2023, the situation changed in the opposite direction – just in time for the beginning of summer vacations [16]. The data take into account all categories of border crossings: those who sought refuge, went for vacation, treatment or earnings. According to Figure 3 researched that the number of people leaving from January to March 2022 was greater than the number of people entering Ukraine. This is due to the beginning of the war, so many people left for other countries for the purpose of shelter.

Already from April to July, there was a slight difference between outgoing and incoming persons, and already in August, there was a positive trend in the entry of both citizens of the country and foreigners into Ukraine. This can be explained by the fact that it was from May to August that people left for the purpose of recreation. In December 2022 and May 2023, the rate of incoming and outgoing persons was the most stable, which is explained by entry into and from Ukraine for the purposes of recreation (New Year's tours, winter skiing, children's vacations), treatment, or even earnings.

4. Bus tours

It is worth noting that today bus tours are very popular. Bus tours have been developed to any country in Europe, and this is the type of transportation used by Ukrainians in most cases. The tour operator "Join Up" reported that the most popular destinations in the summer of 2022 were Egypt, Turkey, Bulgaria, Greece, Montenegro, in the winter – UAE, Sri Lanka, Tanzania, Maldives, Andorra. In 2023, the same routes were preserved, but more bus tours appeared [7].

Regarding the trends of 2024, at the tour operator Eline-tour, a bus package tour to Bulgaria for 9 nights (including travel) in the beginning of June 2024 under the "all inclusive" system (Figure 4) is currently worth from UAH 10,011/person (235,5 € according to the exchange rate of the tour operator on January 30) [12].

A package tour with a flight to Turkey at the beginning of June 2024 for 7 nights under the "all inclusive" system with the Moldovan tour operator «Join Up» (Figure 5) costs from UAH 19,713/person (€480.8 according to the tour operator's exchange rate on January 30) [7].

At the moment, the prices are very attractive, because the early booking period continues and the price for the tours is the best. Analyzing all the data and information about the travels of Ukrainians, it is worth noting that airplane tours have always been popular, and even during the period of military operations, people are ready to go to another country in order to fly on vacation, because it is more convenient and faster. Below is the diagram, that shows what trips were booked by Ukrainians in 2022: air travel is a trip in which the main means of transport is an airplane, bus tours are trips on buses, ground handling is a set

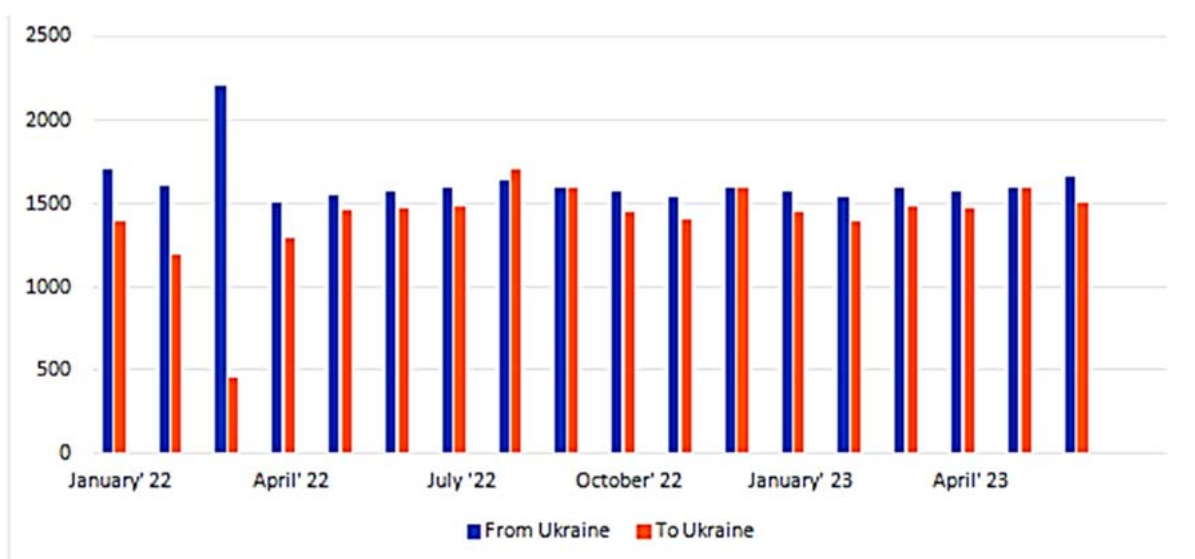


Figure 3. Number of border crossings by citizens of Ukraine, thousands of people

Source: on the basis [16]

Transport	Date of check in	Date of check out	Nights	Region Transport	Hotel	Food type	Type of number / Placement	Discounts	Price	AI CRM
01.06.24, Sat ✓ 09.06.24, Sun ✓	02.06.2024	09.06.2024	7	Бургас - Сонячний Берег Болгарія	AZURRO HOTEL (3*)	ALL INCLUSIVE	SINGLE ROOM STANDARD / 1adl	1	10011 ₺	+
01.06.24, Sat ✓ 09.06.24, Sun ✓	02.06.2024	09.06.2024	7	Бургас - Сонячний Берег Болгарія	AZURRO HOTEL (3*)	ALL INCLUSIVE	SINGLE ROOM STANDARD / 1adl	1	10011 ₺	+
01.06.24, Sat ✓ 09.06.24, Sun ✓	02.06.2024	09.06.2024	7	Бургас - Сонячний Берег Болгарія	AZURRO HOTEL (3*)	ALL INCLUSIVE	SINGLE ROOM STANDARD / 1adl	1	10011 ₺	+
01.06.24, Sat ✓ 09.06.24, Sun ✓	02.06.2024	09.06.2024	7	Бургас - Сонячний Берег Болгарія	AZURRO HOTEL (3*)	ALL INCLUSIVE	SINGLE ROOM STANDARD / 1adl	1	10011 ₺	+

Figure 4. Online search for a tour on the website of the tour operator "Elaine Tour"

Source: [12]

Race	Tour	Nights	📍	🏨	🍽️	🔍	👤	🛡️	Price	➔
06/01/2024, Sat ⏰ 00:05	TUR Antalya from Chisinau (for residents of Ukraine only) Fly One - night flights #3	6 +1	Beldibi	Ipsos Hotel 3*	All inclusive	Standard Room	SGL	🛡️	19523 UAH	Economy ✓✓✓
06/01/2024, Sat ⏰ 00:05	TUR Antalya from Chisinau (for residents of Moldova only) Fly One - night flights #3	6 +1	Beldibi	Ipsos Hotel 3*	All inclusive	Standard Room	SGL	🛡️	19651 UAH	Economy ✓✓✓
06/01/2024, Sat ⏰ 06:25, 12:00	TUR Antalya from Chisinau (for residents of Ukraine only) Fly One - day flights #3	7	Beldibi	Ipsos Hotel 3*	All inclusive	Standard Room	SGL	🛡️	19713 UAH	Economy ✓✓✓
06/01/2024, Sat ⏰ 06:25, 12:00	TUR Antalya from Chisinau (for residents of Moldova only) Fly One - day flights #3	7	Beldibi	Ipsos Hotel 3*	All inclusive	Standard Room	SGL	🛡️	19840 UAH	Economy ✓✓✓

Figure 5. Online search for a tour at the "Join Up" tour operator

Source: [7]

of services for accommodation, meals, insurance, in addition to travel.

Analyzing the data of this diagram (Figure 6), we can see that most Ukrainians traveled by air transport, this can be explained by the fact that before the full-scale invasion, planes flew from the airports of our cities and bus travel was not very relevant. After all airports in Ukraine were closed to tourists due to military operations, bus tours gained their greatest momentum.

5. Adjusting to new tourist requests

Carriers and tour operators effectively adapted to the new requests of tourists and modernized their buses, making trips comfortable and safe: spacious seats, sockets and USB connectors near each passenger, air conditioners, free Wi-Fi, coloring pages and warm blankets for children, sanitary stops every 3–4 hours with the possibility of ordering lunch at the stops, fastening for car seats, the possibility of transporting people in wheelchairs, the possibility of choosing a seat – "comfort", "economy", accompanying managers on each route, etc. [7]. An example of such transport can be called the

buses of tour operators "Join Up", "Alliance", "ALF", "Eline-tour", etc.

6. Cooperation with foreign consolidators

In order to provide their clients with a greater variety of tours, tourism enterprises began to cooperate with foreign tour operators (Figure 7):

- ITAKA (Poland);
- Rainbow (Poland);
- Foster (Poland);
- Panda (Moldova);
- TokoTour (Moldova).

The Polish tour operator "ITAKA" and the Moldovan tour operator "Toco Tour" are very popular, because among all European tour operators, they offer tours in all directions of the world, the best prices and loyal conditions.

7. SWOT analysis of the tourist services market of Ukraine

In order to characterize internal factors (weaknesses and strengths) and external factors (opportunities and threats), the SWOT analysis method (Table 1) was used, which will make it possible to develop an effective business plan that

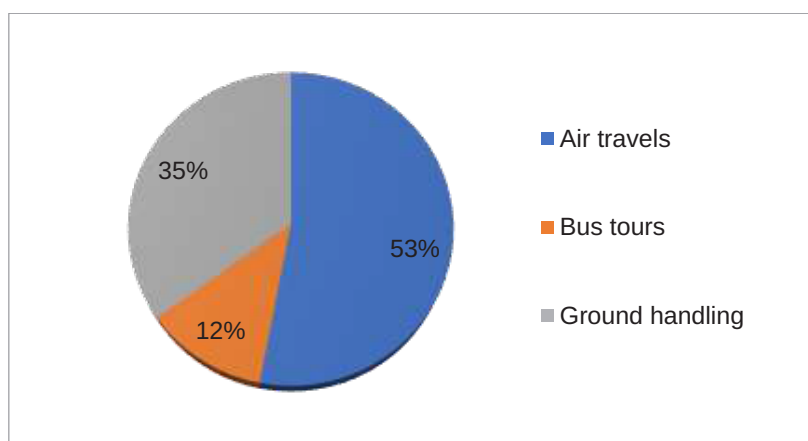


Figure 6. Booked trips in 2022 by Ukrainians

Source: on the basis [7]



Figure 7. Logos of tour operators ITAKA and Toco Tour

Source: [15; 17]

can be used in the formation of strategies for the development of the tourism industry in Ukraine.

Using the SWOT analysis method (Table 1), the external and internal factors of influence on Ukrainian tourism were formed, strengths and weaknesses, opportunities and threats were identified. Factors that should be taken into account for forming a strategy for the development of the tourism industry are also named.

8. Proposals for the restoration of the market of tourist services in the conditions of military operations

In today's conditions of local and global challenges, there is a need to form the entire spectrum of infrastructure for the development of the tourism industry, since this industry is connected with financial flows in the form of investments, development programs, the formation of the country's tourist image, which will provide opportunities to restore not only the tourist, but also related industry.

The development of tourism is the main factor of social and economic growth, which contributes to the better development of infrastructure, the introduction of innovations, the increase in the intensity of the

service market, and the investment of funds for the development of tourism in the country. The tourism industry plays a significant role in the formation of the country's budget, its investment attractiveness and image formation (Figure 8).

In Figure 8 proposals for the restoration of tourism in Ukraine in the conditions of war for tour operators, travel agents, state authorities, carriers, catering and accommodation establishments were formed, namely:

1. Tour operators:

- development of tours available for ukrainians (cheaper, but no less interesting and rich, request for hotel loyalty programs for ukrainian tourists);
- interaction with state authorities in matters of border crossing by ukrainians for the purpose of medical and psychological rehabilitation;
- improvement of the search system on the sites of tour operators (all offers in real time, exchange rates in a prominent place, etc.).

2. Travel agents:

- renewal of contracts with tour operators, hotels, carriers, insurance companies, excursion bureaus;
- signing agreements on cooperation with european maintenance companies;

SWOT analysis

	Strengths	Weakness
Internal aspect	<ol style="list-style-type: none"> 1. There is a stable demand for tourist inquiries. 2. Flows of Ukrainians temporarily traveling abroad for various purposes (rest, treatment, education). 3. Due to the impossibility of men traveling abroad, tourism has picked up in the western part of Ukraine. 4. The possibility of providing a tourist service from anywhere in the world. 5. The famous name of Ukraine in the international arena and the desire to establish relations with external partners 	<ol style="list-style-type: none"> 1. The unstable situation in the country, in particular the exchange rate (the exchange rates of most tour operators are much higher than those of the National Bank of Ukraine), which causes potential customers to be dissatisfied. 2. Incomes of the majority of the population are at a low level (income redistribution has taken place). 3. Reluctance to use savings for tourism purposes. 4. Increase in prices for air tickets, air tours and bus tours to some European countries. 5. Clients' mistrust of travel agencies that do not have an open office and work online
External aspect	<ol style="list-style-type: none"> 1. Willingness of tour operators to adapt to the requests of Ukrainian tourists. 2. Use of foreign consolidators to diversify the tourist product. 3. Formation of close relations with new tourist counterparties to create foreign tourist demand in the future. 4. Broad opportunities for new operators to occupy vacant places in the tourist market. 5. Increase in tourist demand by reducing uncertainty of potential tourists before going abroad. 	<ol style="list-style-type: none"> 1. Development of a military conflict. 2. Competition of foreign travel agencies. 3. Stagnation of the economy of Ukraine. 4. Increasing stress and depressing the morale of Ukrainians, which will lead to reluctance to travel. 5. Strengthening of customs formalities and issuance of tourist documents.

Source: generated by the authors

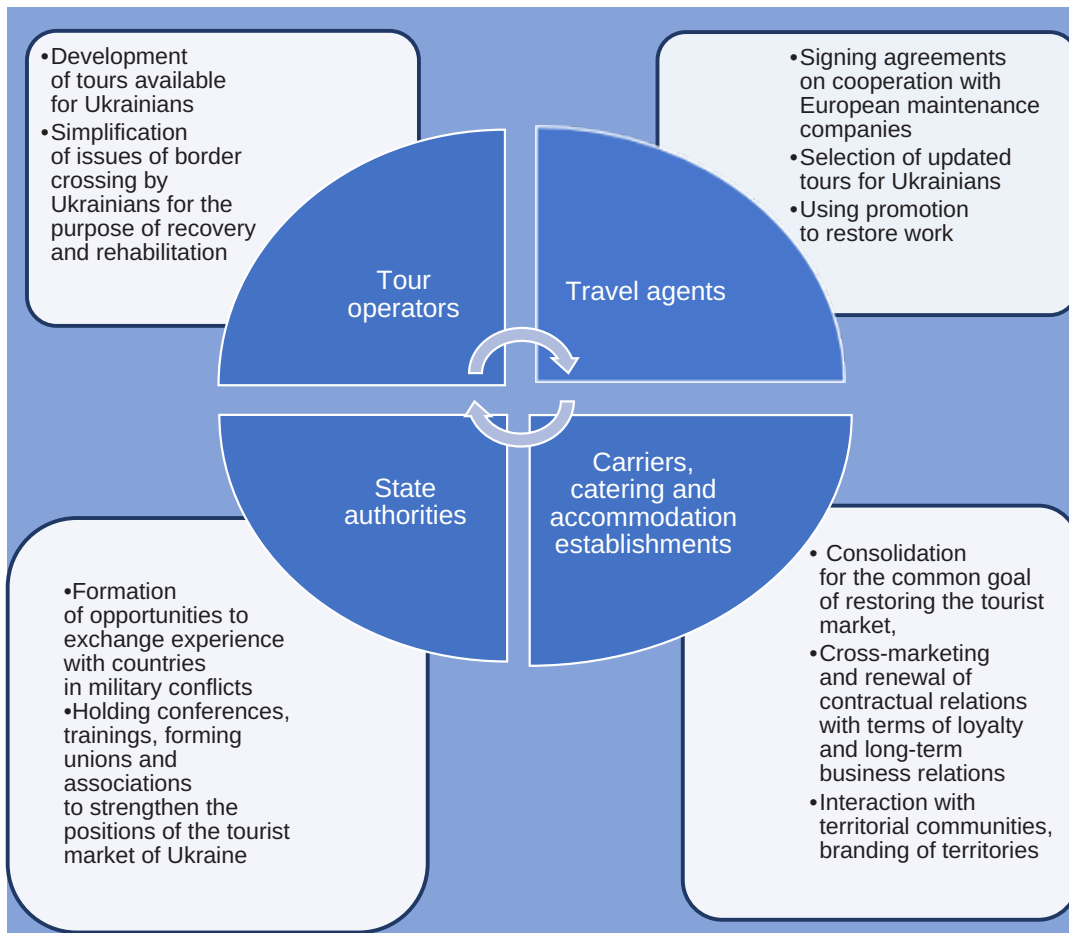


Figure 8. Proposals on the restoration of the market of tourist services in the conditions of military operations

Source: generated by the authors

- submission of advertising to stimulate demand (direct mail, social networks);

- selection of updated tours for ukrainians (bus excursions and bus package tours).

3. State authorities: formation of opportunities for exchange of experience, conferences, trainings, formation of unions and associations to strengthen the positions of the tourist market with the involvement of foreign travel agents.

4. Carriers, catering and accommodation establishments: consolidation for the common goal of restoring the tourist market and contractual relations with conditions of loyalty and long-term business relations.

The ultimate goal of all the above measures is the formation of inbound flows (popularization of foreign tourist destinations, trial exchanges of tourists), revitalization of tourism. The restoration of tourist activity is important, since tourism has a set of properties that will make it possible to solve certain social and economic problems, the main of which are conservation of the tourism industry and stagnation of other spheres of activity through military action on Ukrainian territory. In addition to forming the image of the territorial communities, promotion of quality national tourist product increased staffing tourism and related spheres will create an opportunity potential for the cultural and educational function of tourism, making leisure time meaningful, creation of prerequisites for post-war recovery economic spheres of activity.

Conclusions. The study highlights the topic of the state of tourism in the conditions of military operations and suggests directions for its effective development. The military actions on the territory of Ukraine had a detrimental effect on the tourism industry, because they left a negative impression on the attractiveness of our country from the point of view of tourism and security in general.

Moral and physical fatigue, a depressed emotional state, psychological injuries, the need for various types of rehabilitation – these are the main characteristics of a potential Ukrainian tourist. Tourist operators and travel agents do a lot of work to provide Ukrainians with quality rest. Now is the time to travel, as every Ukrainian needs rest, recovery of mental and physiological strength, medical and social rehabilitation.

Tour operators in Ukraine work productively to make travel easy, safe and comfortable:

- develop tours for Ukrainians that are affordable, appropriate in terms of quality and full of vivid emotions;

- adjust tourist products to the individual requests of the tourist;

- implement projects regarding free recreation of military personnel;

- cooperate with foreign consolidators;

- form tours taking into account the budget and preferences of the tourist;

- offer good conditions for travel agencies and loyalty to their clients.

We can be sincerely proud of the professionals who work in the tourism sector in such a difficult time. Tourism has the right to exist even during war. Tour operators and other tourism enterprises should provide tourists with opportunities for travel, but in the long term, strengthen the infrastructure for inbound tourism and popularize the "Ukrainian tourism" brand. In conclusion, it is worth noting that there is a need to create all conditions for the development of tourism in Ukraine, because this industry brings with it large flows of foreign investments, plays a significant role in shaping the image and tourist attractiveness of Ukrainian destinations.

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