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# Research on the prospects for the future development of international tourism in the world and in Ukraine

## *Výskum perspektív budúceho rozvoja medzinárodného cestovného ruchu vo svete a na Ukrajine*

Volodymyr YERMACHENKO\*

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### Abstract

*The article is devoted to researching the results of the recovery of international tourism after the long-term impact of the COVID-19 pandemic in the world and the prospects for the development of inbound tourism to Ukraine in the post-war period. It is argued that it was the revitalization of inbound tourism that enabled the world's major economies to ensure employment, restore the sustainable development of tourist destination infrastructure, and regain the leading position of the tourism industry in shaping national budgets. The study analyzes the relationship between the development of inbound tourism and GDP growth in the world's leading countries by comparing macroeconomic indicators. Attention is paid to finding ways to revive Ukraine's tourism market, which, having failed to recover after the pandemic, found itself in a state of prolonged war on its territory, leading to the destruction of tourism infrastructure in the east and south of the country and bringing inbound tourism to a standstill.*

*The purpose of the study is to scientifically substantiate approaches to restoring international tourist flows to Ukraine by forming a modern concept for the development of inbound tourism and increasing its competitiveness.*

*It is substantiated that it is information and other intangible resources that can form the competitive advantages that will ensure the sustainable development of inbound tourism. To achieve this goal, the essence and key determinants of international tourism have been identified, current trends in its development in the world and in Ukraine have been analyzed, the specifics of the industry's functioning in the post-war conditions are characterized, and promising areas of specialization for Ukrainian tourism are outlined.*

*The methodological basis consists of methods of analysis and synthesis, comparative and statistical analysis, generalization, and a structural approach. The information support includes official UNWTO reports, analytical materials from the Ministry of Economy of Ukraine and the State Service for Tourism and Resorts, statistical data, and scientific research.*

*As a result of the study, the main directions of transformation of the activities of enterprises in the tourism sector were identified, approaches to the post-war revitalization of the industry were formulated, and it was substantiated that its modernization is an important factor in the country's economic recovery.*

### Keywords:

*tourism business, international tourism, tourist clusters, revitalization of territories, tourist destinations*

**JEL Classification:** O20, P47, Z32

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## Introduction

### 1 Analysis of the current state and development of international tourism

The current period is characterized by global economic and international relations changes. An important component of these processes is international tourism relations. The rapid growth of tourism in the post-pandemic recovery period, its complex nature, and its increasing impact on various aspects of modern society necessitate a theoretical study and generalization of the complex and diverse processes that characterize international tourism relations.

Tourism influences the development of international relations, cultural exchange, the development of democracy and tolerance in society, etc.

International tourism performs several important functions in a country's economy:

- it is a source of income and foreign exchange earnings for the host country;
- it contributes to the development of related industries and the diversification of the host country's economy;
- it contributes to employment growth, unemployment reduction, and improvement of the standard of living in the host country;
- it contributes to the balance of payments of countries participating in international tourism;
- on an international level, it serves to smooth out differences (leveling the level of economic development) between poor and rich countries and regions.

International tourist flows include tourists who stay in the country for a long time or cross its borders. They have a significant impact on the development of the host country's tourism industry and depend on a variety of global security factors, including natural disasters, geopolitical instability, political changes, acts of terrorism, and military conflicts. The consumer spending of non-residents of a particular country is both a factor and a source of tourism infrastructure development international tourist flows (2018)/[6]. However, it is necessary to acknowledge the existing problem of accurately calculating tourist spending abroad. When exporting goods, it is known exactly how many and what products are sold, but there is no complete picture of how much the country earns from foreign tourists. Unlike trade in goods, which is registered by customs authorities at the border, national statistics often provide only an incomplete account of income from inbound tourism, as it is impossible to reliably identify personal purchases in most cases in many countries around the world, especially where there is a large volume of cash circulation and it is impossible to accurately account for the incoming and outgoing volume of currency used by tourists.

The tourism sector has been and now, after summarizing the results of 2024, it can be said with confidence that it remains one of the key drivers of the global economy, accounting for a total of about 10% of global GDP and supporting hundreds of millions of jobs. The recovery of the industry after the COVID-19 pandemic has been the subject of intensive study by both international organizations and the academic community. Let's look at the behavior of the main factors characterizing inbound international tourism over the past 5 years for the 10 leading countries. We will select the following as the main factors. An international arrival is any visitor who travels to another country for tourism purposes and stays there overnight. Tourism receipts are expenditures made by foreign visitors in the host country on goods and services for their own consumption. These data are reflected in the "Services" item of the balance of payments of the host country. The share of inbound tourism revenue in GDP is calculated as the direct ratio of international tourism revenue (in billions of USD) to the total nominal GDP of the host country (in trillions of USD) for the corresponding year. This metric demonstrates the direct dependence of the economy on foreign tourists. Table 1 shows data on the number of arrivals and revenues from inbound tourism for 10 countries that were world leaders in international inbound tourism in 2019, the pre-pandemic year, and in 2024, the first year in which inbound tourism reached pre-pandemic levels.

**Tab 1** Top 10 countries by inbound tourism revenue, arrivals and their share in GDP in 2019

**10 countries by inbound tourism revenue, arrivals and their share in GDP in 2019**

Ranking (by Tourism Revenue)	Country	Tourism Revenue (USD billion)	Number of Arrivals (million)	GDP (USD trillion)
1	USA	214	78.7	21.3
2	Spain	71.4	83.8	1.40
3	France	63.8	90.3	2.83
4	Thailand	59.0	39.7	0.54
5	United Kingdom	53.1	39.4	2.86
6	Italy	49.3	64.6	2.0
7	Australia	45.3	9.5	1.39
8	Japan	42.8	31.9	5.10
9	Germany	41.6	39.6	3.89
10	China	40.1	67.5	14.30

**Source:** formed by the author on the databases [13]

In 2024, the first year in which inbound tourism reached pre-pandemic levels, the top ten leaders changed not only in terms of the number of arrivals to the country, but also in terms of revenue from inbound tourism. Therefore, the composition of the “top ten” itself has changed. This is reflected in Table 2.

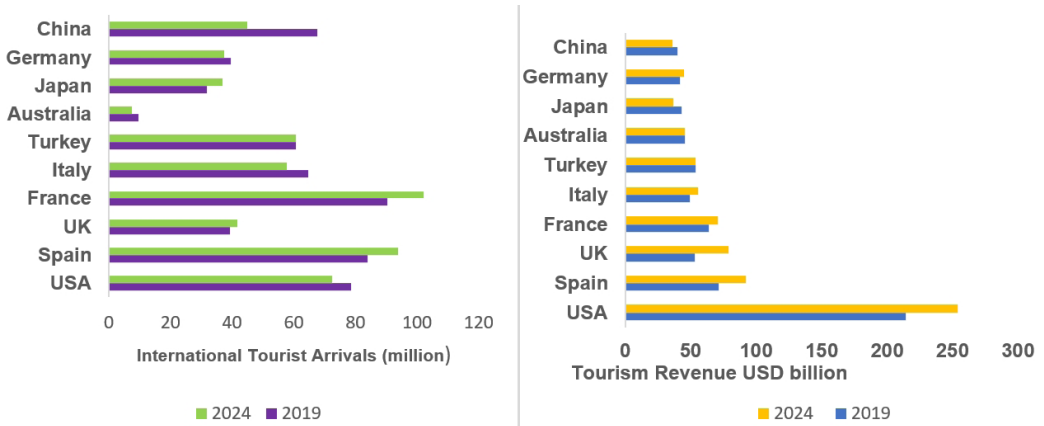
**Tab 2** Top 10 countries by inbound tourism revenue, arrivals, and their share in GDP in 2024

Ranking (by Tourism Revenue)	Country	Tourism Revenue (USD billion)	Number of Arrivals (million)	GDP (USD trillion)
1	USA	253.9	72	29.1
2	Spain	92.0	93.8	1.73
3	UK	78.9	41.8	3.64
4	France	71.0	102.0	3.16
5	Italy	55.9	57.8	2.30
6	Turkey	54	60.6	1.10
7	Australia	45.3	7.6	1.70
8	UAE	42.9	17	0.50
9	Japan	36.9	36.9	4.25
10	Mexico	35.9	45.0	1.5

**Source:** formed by the author on the databases [13]

A comparison of the two periods shows the industry’s recovery after a civilizational cataclysm that, according to preliminary estimates, claimed the lives of more than 6.8 million people. COVID Live (2023)/[4], suspended production in virtually all countries of the world and caused cumulative losses to the global economy of approximately \$12 trillion in 2020-2021, with a projected \$28 trillion over the five years from 2020. (Virtual Press Conference (2020)/[12], World Economic Outlook Update (2020)/[14]). As of January 2021, during the pandemic, total global GDP had shrunk by nearly \$22 trillion, Coronavirus: Global GDP(2021)/[3]. There has also been a significant impact on structural shifts in the global tourism market, which is sensitive to large-scale cataclysms, leading to two years of collapse and stagnation.

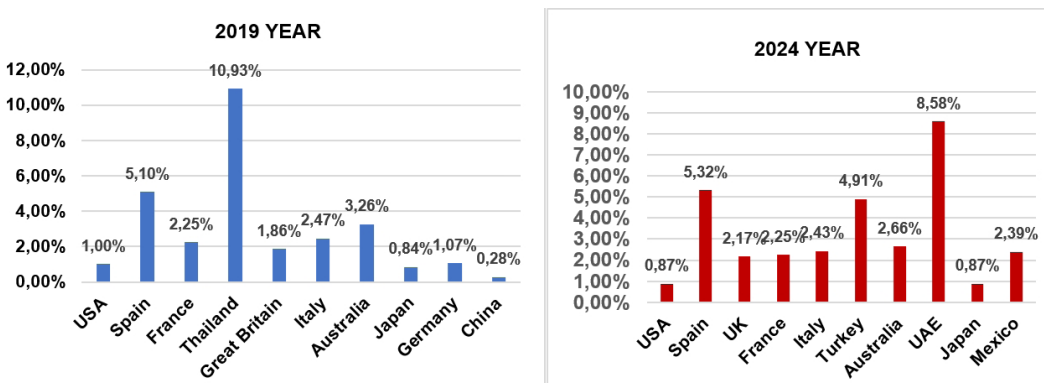
**Fig.1** Comparative indicators of inbound tourism and tourism revenues (Top 10 countries for 2019 and 2024)



**Source:** formed by the author on the databases [13]

Based on the results of a comparative analysis, we can conclude that virtually all the top ten countries in 2024 have restored their inbound tourism to pre-pandemic levels. To clarify the general trends in the growth of the tourism sector, let us consider the impact of total revenue in this sector on the GDP of countries. The share of tourism in GDP in most countries ranges from 1% in highly developed and diversified economies to 10% in countries with a relatively large tourism sector (USA – 0.87, UK – 2.17, Spain – 5.32, UAE – 8.58%). A comparative analysis of 2019 and 2024 showed that global tourism demonstrates high adaptability and growth potential even in the face of global shocks, Fig. 2. Leading countries are characterized not only by significant potential in natural and cultural resources, but also by strategically balanced approaches to their use. A high level of integration of modern information technologies and effective management of cultural heritage are key determinants of their competitiveness and long-term sustainable development trajectories.

**Fig. 2** Comparative characteristics of index indicators of countries by the share of income from inbound tourism in GDP

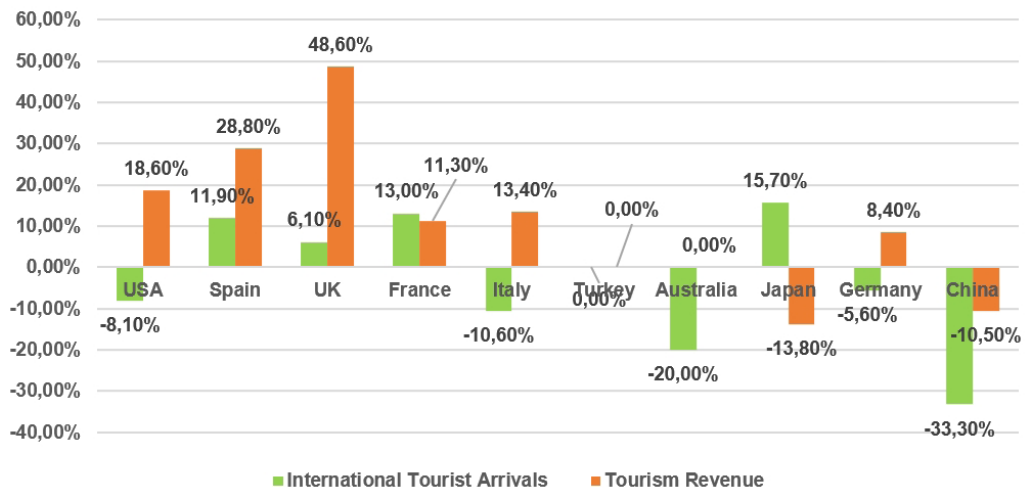


**Source:** formed by the author on the databases [13]

The modern tourism industry is rapidly recovering and once again occupies an important place in international economic relations and influences the development of the economies of individual countries and the global economy as a whole. According to statistics, international tourism accounts for 9-10% of global GDP and about 7% of total global exports, and the number of tourists who traveled to other countries in 2024 exceeded 1.4 billion people. Tourism as an export category ranks fifth in global exports of goods and services, second only to exports of fuel, chemicals, food products, and the automotive industry, and at the same time ranks first in many developing countries.

The economic development and tourism resources of the leading countries in the field of tourism are closely correlated with their unique tourism resources and ability to monetize these assets, as confirmed by UNWTO and WTTC data. A comparison of indicators shows that in 2024, most countries have restored or exceeded their 2019 tourism revenues, despite varying dynamics in the number of international arrivals. Spain and France are showing significant growth in tourist flows, which increases their global competitiveness. At the same time, the US has seen a decline in arrivals but maintains high tourism revenues, which may indicate higher tourist spending. A visualization of the data on this trend is presented in Fig. 3.

**Fig. 3** Comparative characteristics of the dynamics of index indicators of countries by the number of arrivals and revenues from inbound tourism



**Source:** formed by the author based on [13]

Based on the results of the analysis of global tourism resilience, we can draw some general conclusions. The US, Spain, and the UK showed significant growth in international tourism revenues in dollar terms compared to pre-pandemic levels. The US increased its revenues by almost 19%, despite the fact that the number of arrivals is still 8.1% below 2019 levels, indicating a significant increase in average spending per tourist. Spain and France have fully recovered and exceeded both revenues and arrivals. Thailand, Germany, and China dropped out of the top 10 in terms of revenue in 2024, giving way to other countries, reflecting changes in global flows and recovery rates. Japan achieved a record number of arrivals in 2024 (+15.7%), exceeding its previous peak in 2019. A key trend in 2024 was the increase *in average spending per tourist*. This confirms the findings of the World Economic Forum (WEF) that the sector is showing significant resilience and the ability to generate higher value added even with lower physical visitor flows. Although the direct contribution of inbound tourism revenues to GDP is relatively small for large economies (US ~0.87%, China ~0.28%), for countries with a strong dependence on tourism, this share is critical. For countries such as Spain and the UAE, international tourism is a fundamental

pillar of the economy, and restoring this indicator to or above 2019 levels is of crucial macroeconomic importance.

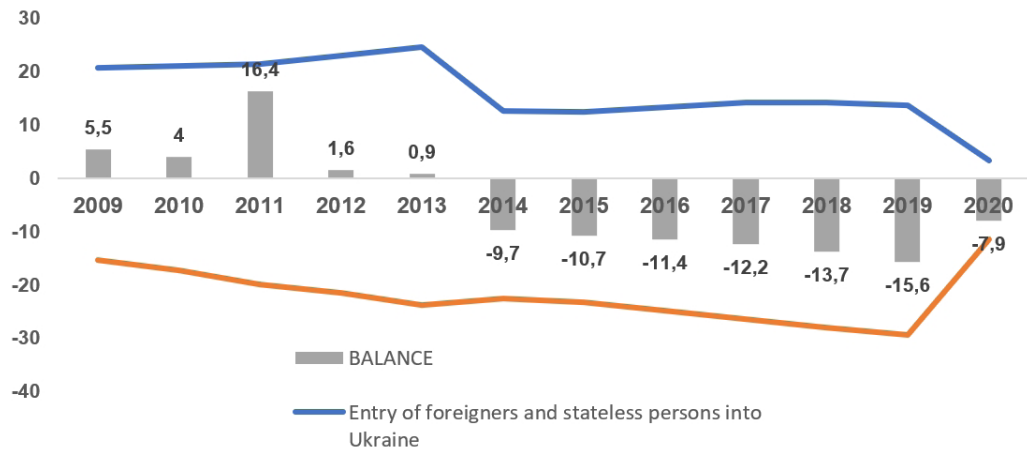
Academic research indicates continued growth in the industry, but with new challenges and emphases. The number of international arrivals in 2025 is projected to already significantly exceed pre-pandemic levels. The UNWTO expects growth of 5% in the first half of 2025. The main obstacles could be high inflation in tourism services (transport, accommodation) and persistent economic factors and geopolitical risks, which could dampen consumer confidence. Regional shifts are also possible. The Asia-Pacific region is expected to be a key driver of growth in the medium term, as its recovery began later.

Based on an analysis of inbound tourism dynamics for 2019 and 2024 using 10 leading countries as examples, and based on data from the United Nations World Tourism Organization (UNWTO) and the World Travel and Tourism Council (WTTC), as well as the World Bank (WB) and the International Monetary Fund (IMF), it is possible to make some predictions for an equivalent period of 5-6 years, but hopefully less turbulent. The global tourism market, estimated at \$10.5 trillion in 2022, is expected to grow at an average annual rate of 5% over the next five years. Analysts expect that by the end of the forecast period in 2032, the tourism market will be worth US\$17.1 trillion. According to UNWTO data, by 2030, the total number of tourist trips is expected to reach 37.4 billion, of which 17.4 billion will be international and domestic overnight trips (1.8 billion international/15.6 billion domestic).

## **2 International tourism in Ukraine in the pre-war period**

From 2009 to 2013, Ukrainian tourism, like global tourism in general, showed steady growth—more than 8 million hotel stays annually. Until 2014, Ukraine had seen strong growth in international tourism, including inbound tourism. According to Julia Simpson, President and CEO of the World Travel and Tourism Council (WTTC), tourism «contributed UAH 561 billion to the Ukrainian economy, which is actually about 6.5% of GDP. In Ukraine, before the COVID-19 pandemic and the war, 1.15 million people were employed in the travel and tourism sector.» Tourism is one of the most powerful weapons (2024)/ [11]. The number of so-called tourist magnets was growing. The preparation and successful hosting of the 2012 European Football Championship in Ukraine played an important role in this. Eight sites were added to the list of UNESCO World Heritage Sites in Ukraine. Existing sports, transport and logistics, cultural and entertainment facilities were renovated and new ones were built, as well as accommodation, catering and other facilities. From 2010 to 2013, the number of international tourists grew steadily, but in 2014 there was a sharp drop in the number of inbound tourists by 48.5%, while the number of outbound tourists decreased by only 5.6%. The entry of foreigners and stateless persons into Ukraine and the departure of Ukrainian citizens abroad from 2009 to 2020, according to data from the State Border Service of Ukraine, is shown in Fig. 4.

**Fig. 4** Entry of foreigners into Ukraine and departure of Ukrainian citizens abroad and balance of revenues/losses to the budget



**Source:** formed by the author based on [10,13]

The first Russian aggression halved the 2013 figures. Since 2014, due to the start of the Russian-Ukrainian conflict and its negative consequences, there have been significant changes in the structure and volume of international tourist flows to Ukraine. Since that year, international tourist visits to Ukraine have declined significantly due to the political crisis in the country, the annexation of Crimea, and negative changes in the regional structure of tourism provoked by events in eastern and southern Ukraine. In particular, the annexation of Crimea resulted in the loss of approximately 30% of the country's tourism and recreational potential for leisure, forcing some foreign tourists who preferred seaside holidays to look for alternatives or abandon this type of holiday in Ukraine. In 2015, the situation worsened, and the number of foreign tourists visiting Ukraine reached a historic low.

From 2016 to 2019, the situation with international tourist flows improved somewhat, with outbound tourism growing by 6.60% in 2016, 7.17% in 2017, 5.82% in 2018, and 4.89% in 2019. The number of outbound tourists exceeded pre-war levels, reaching almost 30 million. However, this growth led to a decrease in revenues to the country's budget, as the money spent by Ukrainian tourists did not go towards the development of Ukraine's tourism industry.

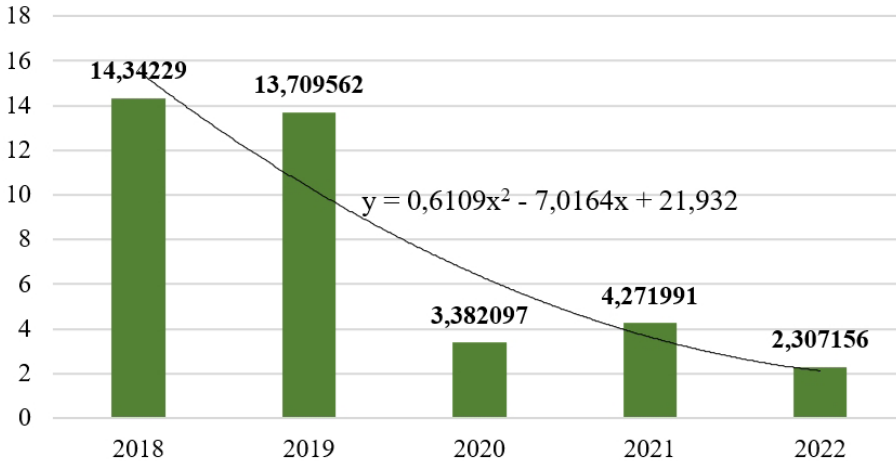
Arrivals also grew steadily until 2018: 7.28% in 2016, 6.72% in 2017, and 0.80% in 2018. However, in 2019, arrivals fell again by 4.41%. This happened before the pandemic, which further negatively affected the decline in tourist flows. Overall, the gap between the number of inbound and outbound tourists can be explained by the consequences of the significant decline that occurred in 2014, when the number of inbound tourists fell sharply. Thus, the start of the Russian attack on Ukraine in 2014 and the associated financial and geopolitical crises caused changes in international tourist flows.

The complex geopolitical situation in Ukraine has become a kind of negative factor in the global tourism market, playing a key role in the reduction of inbound tourist flows during this time. When choosing a place to vacation, many tourists prefer countries with guaranteed security and stability. It should be emphasized that Russia's full-scale invasion of Ukraine in February 2022 posed a threat not only to the Ukrainian tourism sector, but also to the global tourism industry, which was beginning to recover from the damage caused by the Covid-19 pandemic, especially in Europe. A study of tourist flow dynamics in recent years has revealed important trends. In 2018, 14.34 million arrivals were recorded, but in 2019, this figure fell by 4.41% to 13.71 million. The pandemic year of 2020 saw a catastrophic decline in arrivals of 75.33%, caused by Covid-19

and the introduction of quarantine, reducing the number to 3.38 million. However, in 2021, there has been an increase of 26.31% to 4.27 million arrivals. In contrast, 2022 shows a decline of 45.99%, with a total of 2.31 million arrivals.

The main trend is a dramatic drop in the number of arrivals in 2020 due to the pandemic, followed by a recovery in 2021 and another decline in 2022 due to Russia's military actions against Ukraine. Geopolitical uncertainty, economic challenges, and the pandemic situation have significantly affected the stability of tourist flows, which has significant consequences for Ukraine's economy and tourism industry. An analysis of the dynamics of the entry flow over 5 years from 2018 to 2022 is presented in Fig. 5.

**Fig. 5** Analysis of the dynamics of the entry flow, million people



**Source:** compiled by the author based on data from [8]

The trend line on the graph (Fig. 5) shows a stable downward trajectory, indicating a gradual decline in inbound tourist flows even before the start of the pandemic. The shock years of 2020 and 2022 stand out in particular, when the dynamics deviated sharply from the average trend due to pandemic restrictions and military events. Even despite a partial recovery in 2021, the growth rate was insufficient to return the industry to its pre-crisis level. This confirms the low resilience and slow adaptability of Ukraine's tourism sector to external challenges. As a result, the overall trend reflects a deepening systemic crisis in the field of inbound tourism.

### 3 The state of international tourism in Ukraine in 2022–2024

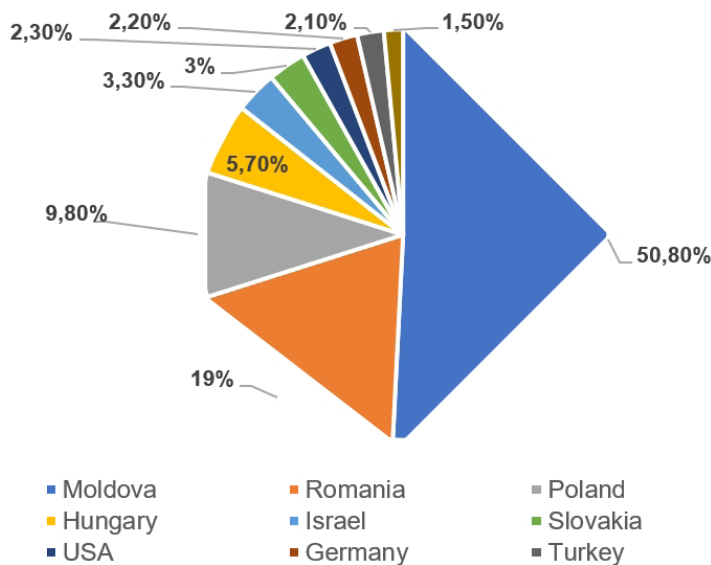
The catastrophic decline in Ukraine's international tourism industry is linked to Russia's military aggression. According to the Report (2023)/[2]. Instead, it triggered an unexpected transformation: tourism companies began to use their knowledge, connections, and experience to save lives and relocate the most vulnerable categories of Ukraine's population abroad.

In the summer of 2024, four leading industry associations – the Association of Inbound Tour Operators of Ukraine, the Ukrainian Hotel and Resort Association (UHRA), the All-Ukrainian Association of Guides, and the Ukrainian Restaurant Association—conducted a nationwide survey on the state of tourism during the war. The survey involved 268 respondents from 23 regions of Ukraine and Kyiv. Representatives of accommodation establishments (45%), tour operators and travel agencies (20%), catering establishments (15%), and others were surveyed. The results of the study are disappointing. Compared to pre-war times, only 13% of companies have increased the volume of services provided; three-quarters of companies have seen a decrease in

the volume of work, in many cases by more than half; almost half of those surveyed lack financial resources; 10% of enterprises are not operating at all. American experts analyzed the results of the study and calculated that if it weren't for the war, Ukrainian tourism could have earned \$1.75 billion in 2024. In reality, the industry earned \$700 million. These results also affected the labor market, which lost 700,000 potential jobs.

In 2024, Ukraine continued to be the subject of significant international attention, which is reflected in the dynamics of inbound tourist flows. According to the State Border Service, more than 20 million foreign tourists visited the country in 2019, but due to pandemic restrictions and the subsequent escalation of military aggression, this figure has fallen significantly: to 4.5 million in 2021 and to a minimum level in 2022 due to the start of a full-scale invasion. In 2023, the number of foreign visitors was about 2.5 million, while in the first half of 2024, it was 1.19 million.

**Fig. 6** Statistics of tourist arrivals to Ukraine by country of origin in 2024



**Source:** compiled by the author based on data from [13]

Unfortunately, with a total number of entries in 2024 amounting to 2,481,203, only 701 people entered for the purpose of “tourism”...The full-scale invasion of 2022 could have been the final blow to the industry (tourism statistics show that official employment fell by 40,000). Unfortunately, we can only report the most disappointing results for international tourism in Ukraine as of 2024. However, the figures for domestic tourism, which is currently the industry’s lifeline, are encouraging. The total amount for 2024 was approximately UAH 3 billion for the first time since 2020. DART (2025)/ [5]. Therefore, we can confidently state that the industry has survived and is showing a successful upturn in the development of at least domestic tourism and a slight decrease in outbound tourism. And for the first time since 2022, this corrects the trends in the overall balance of tourism revenues amid an absolute decline in inbound tourism.

## 4 Comparative analysis of the prospects for the development of inbound tourism in the context of post-conflict and post-pandemic recovery

An analysis of the resilience of the tourism sector requires differentiation between types of crises. The COVID-19 pandemic was a global, systemic shock, while military conflicts (e.g., Syria, Ukraine) and large-scale natural disasters (e.g., earthquakes in Turkey and Syria in 2023, tsunami in the Indian Ocean in 2004) are local, albeit devastating, in nature. A comparison of the trajectories of recovery after the impact of the pandemic and natural and political disasters reveals fundamental differences in dynamics and prospects.

Features of the impact of the COVID-19 pandemic on tourist destinations and features of their revitalization, were characterized by administrative restrictions (lockdowns, border closures), but not by physical destruction of infrastructure. Demand recovery was V-shaped and rapid as soon as restrictions were lifted. Examples from Spain, Saudi Arabia, the UK, and others show that pent-up demand led to a rapid recovery and even growth in revenues (see Table 3). The key factors in the recovery were consumer confidence in travel safety and the coordination of international protocols (vaccine passports). The physical infrastructure remained intact.

Military conflicts and natural disasters lead to local destruction and slow S-shaped recovery of supply. These crises result in direct destruction of tourism infrastructure (hotels, transport hubs, heritage sites) and, importantly, long-term loss of *perception of safety* in the destination.

Unlike a pandemic, recovery from conflicts/disasters requires not only the restoration of demand, but also the reconstruction of supply and, most importantly, the restoration of the image of safety. The result of the impact on tourist destinations: local destruction, slow S-shaped recovery of supply. Comparative factors of tourism recovery (potential and prospects) are presented in Table 3.

**Tab. 3** Comparative factors of tourism recovery

Factor	COVID-19 pandemic	Military conflicts / Cataclysms
Nature of the shock	Global (demand)	Local (supply and security)
Recovery pace	Fast (V-shaped)	Slow (S-shaped)
Key driver	Removal of administrative barriers	Infrastructure reconstruction, image without danger
Potential by 2019	Undamaged	Partially/completely destroyed

**Source:** Own processing

For countries and regions that have experienced conflict (e. g., Ukraine) in the upcoming recovery period, the prospects for tourism development will depend on:

- Investments in infrastructure. Public and private international investments are needed for physical reconstruction.
- Rebranding of the destination. A targeted marketing campaign is needed to change negative perceptions of safety.
- Prioritization of domestic tourism. In the first stage of recovery (3-5 years after stabilization), domestic tourism will be the main driver, as it was in other post-conflict areas (e. g., Croatia in the 1990s).

Studies conducted in post-crisis countries, especially those with military action, such as Montenegro, Croatia, Slovenia, Georgia, Vietnam, and others, show that tourism can play a key role in post-conflict recovery and peacebuilding, but revitalizing post-conflict tourist destinations requires the development of governmental and non-governmental development programs by third-country organizations. Overall, while global tourism has returned to growth, local crises require individual, long-term recovery strategies that differ significantly from the universal «opening of borders» after the pandemic.

## **5 Steps to restore international tourism in Ukraine in the post-war period**

The development of Ukraine's tourism sector under martial law and during the post-war recovery period requires increased attention from state authorities, local governments, and private sector commercial enterprises. Regions affected by military events need to rebuild their transport and service infrastructure. Tourism in these areas will only be able to develop actively after a set of revitalization measures has been implemented and new tourist destinations have been developed that meet current and future market demands.

Cluster associations of tourism and service enterprises and tourist information centers should become key elements in the development of small businesses in the tourism sector. Investments in health, medical, and rehabilitation centers are urgently needed to develop resort and health potential based on the effective and rational use of Ukraine's natural resources.

The restoration and reconstruction of tourist facilities in Ukraine damaged as a result of military events and their further involvement in the tourism industry is an important and necessary step towards restoring lost or destroyed natural, cultural, and mental tourist destinations, as well as restoring their practical value in public life. The total needs of the tourism and culture sector in terms of funds for the restoration and reconstruction of the industry over the next 10 years are estimated at US\$6.9 billion. This figure includes US\$2.3 billion for short-term needs (2023–2026) and US\$4.6 billion for medium- and long-term needs (2027–2033). (Kulivnuk V., (2023)/[8], A. Ivanov, (2023)/[1]). Therefore, efforts to reconstruct and further develop tourist facilities affected by military events should be aimed at reviving their intrinsic qualities and values, restoring their status in public life, and giving them new social significance in the tourism sector of Ukrainian society. DART presented the Concept of Memorialization of Memorial Sites (2024)/[5].

On July 10, 2025, within the framework of the Ukraine Recovery Conference (URC Rome 2025) in Rome, Ukraine and its partner countries signed a Declaration of Intent to establish a Tourism Alliance — an open international initiative to support the recovery of our country through tourism. Italy, the Czech Republic, and Poland were the first to officially join the initiative.

As part of the GovTech Lab Ukraine open innovation program for the public sector, implemented by the Global Government Technology Centre, Kyiv, three challenges were selected, the solution of which will improve the quality of public services. Among them is the project idea of the State Agency for Tourism Development of Ukraine — ETR 2.0 — updating the Unified Tourism Register GovTech Lab Ukraine (2023)/[7]. As of today, the state Unified Tourism Register nominally functions as an administrative database of categorized hotels and licensed tour operators, but it is not capable of fully collecting statistical data, while a significant part of the tourism sector remains in the «shadows.» Therefore, the ETR needs a global transformation into a modern analytical and management system. This will make it possible to see the real state of the tourism industry, reduce the administrative burden on businesses, and increase community revenues from tourism taxes several times over in the coming years. GovTech Lab UA is the first Ukrainian open innovation program that helps implement modern digital solutions in the public sector. It is implemented by the Global Government Technology Centre Kyiv with the support of the Ministry of Digital Transformation of Ukraine, the World Economic Forum, and the Swiss-Ukrainian EGAP program implemented by the Eastern Europe Foundation. The program brings together government agencies, startups, and technology companies to find and test effective solutions.

Ukraine has the opportunity to become a tourism-oriented country again Strategic Roadmap (2023)/[9]. There is significant demand for tourism services among both Ukrainian citizens and foreign tourists, who are willing to spend money on the development of this sector. Unfortunately, the tourism industry has been significantly affected by the COVID-19 pandemic and the ongoing military conflict, which has led to a decline in the industry with no signs of a rapid recovery. Therefore, research into Ukraine's competitiveness in the global tourism services market in the current conditions is very relevant in terms of understanding possible ways to overcome the negative consequences of external aggression, the post-war development of Ukraine's tourism industry,

and the country's gradual return to the top 20 global leaders in international tourism, UN Tourism (2025)[10].

The reconstruction of the country after a full-scale military conflict should include the development of tourism as an independent sector of the economy with the participation of as many active participants as possible, united in the form of a cluster managed by local self-government bodies. Attracting capital to Ukraine should be achieved through active cooperation with foreign partners, aimed at restoring infrastructure and economic growth in the tourism industry as an important sector of the national economy. Ukraine's marketing policy in the field of tourism should emphasize its reputation as a safe and attractive destination for leisure and recreation.

A very important step should be to conduct a large-scale marketing campaign for foreign markets, promote non-standard forms of tourism, and open national tourist offices in developed countries around the world to promote Ukraine as a country with a developed tourist infrastructure, high-quality service, and a long and successful history of inbound tourism.

## Conclusion

The article argues that despite the current stagnation in inbound tourism, it should become one of the drivers of sustainable development in the tourism industry for the post-war development of international tourism in Ukraine. The implementation of the developed proposals should increase the efficiency of the tourism business, which will undoubtedly lead to an increase in employment, growth in the volume of export services provided, a positive impact on the development of enterprises in the tourism industry and related industries, and on the relevant sector of the economy and regional development in general.

Based on a comparative analysis of business activity in the country's tourism sector and its impact on the country's economic indicators, it has been proven that the volume of national income in the post-war period should be linked to recovery and innovation in the tourism sector.

In order to develop a strategy for the effective management of the processes of restoration and development of international tourism in Ukraine in the post-war period, trends in the development of the industry in countries during the period of recovery from the COVID-19 pandemic and natural, political, and social conflicts were analyzed. The study formulates steps for changes in the activities of tourism enterprises focused on international tourism and develops and justifies a number of measures to activate proposals from state and local authorities for the development of clusters focused on creating a competitive tourism product in the context of the end of natural, political, and social conflicts.

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