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FEATURES OF THE DEVELOPMENT OF INTERNATIONAL TRADE IN TOURIST SERVICES

Tetiana Obolenska

Kyiv National Economic University
named after Vadym Hetman,
Kyiv, Ukraine
ORCID iD: 0000-0002-8448-3622

Olha Yatsenko*

Kyiv National Economic University
named after Vadym Hetman,
Kyiv, Ukraine
ORCID iD: 0000-0003-4399-2217

Lesia Lyskova

Kyiv National Economic University
named after Vadym Hetman,
Kyiv, Ukraine
ORCID iD: 0000-0001-6304-7445

Ostian Zdenek

Kyiv National Economic University
named after Vadym Hetman,
Kyiv, Ukraine
ORCID iD: 0009-0007-6305-2368

*Corresponding author:
E-mail: yacenkoolgakneu@gmail.com

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Introduction. The relevance of studying the peculiarities of the development of international trade in tourist services is determined by the significant role of world tourism in the structure of the global economy. In the conditions of a complex international political situation, which is dynamically changing, it is crucial to identify the vectors of the development of the tourism industry to determine the future structure of the macro-regional distribution of tourist flows.

Aim and tasks. The purpose of this study is to identify the dominant factors and prospects for the development of international tourism business in the conditions of modern global economic and political instability to determine the most favourable marketing strategies for interaction in the international market of tourist services by extrapolating the results to the possibilities of post-war recovery of the tourism industry in Ukraine.

Results. An analysis of international tourism arrivals showed that the average annual growth rate of the industry from 1995 to 2020 average annual growth of international tourist arrivals was more than 4 per cent. Over the estimated period from 1995 to 2023, the average arrival rate decreased to 2.46 per cent. Macro-regions are considered the most promising for the scaling of international tourism, as well as the factors that will contribute to this and can inhibit economic processes. Special attention is paid to the positioning of Ukraine during the post-war recovery of the tourism industry. Forecast indicators indicate that international tourist arrivals to Ukraine could reach 61 million people in the tenth year of the post-war period. An alternative strategy for promoting national tourist products and brands in the target markets of Central and Eastern Europe, Asia, and the Middle East was proposed, and the feasibility of continuing the promotion of Ukraine as a tourist brand was substantiated.

Conclusions. This study confirms the vector of the shift in global tourist flows under the influence of a number of factors that deepen the contradictions between the Global South and the North, revealing key trends in the growth and displacement of international tourist flows among countries belonging to two opposite camps. The directions of institutional and structural changes required to restore international tourism in Ukraine in the post-war period to strengthen Ukraine's position in the global tourism market are proposed.

Keywords: tourism, marketing, strategy, post-war recovery, tourist infrastructure, international trade.

1. Introduction.

The performance of the global tourism industry is mainly dependent on geoeconomic transformations, and a rapid recovery from the COVID-19 pandemic to achieve sustainability is the primary goal of modern tourism. The growth in international trade in tourism services improves performance in related industries. It leads to a multiplier effect by introducing modern digital technologies, which positively impacts the regional and national investment climate. The sustained growth of international tourist arrivals and revenues in recent decades has shaped a positive attitude towards tourism as one of the sustainable sectors of the world economy.

The constant positive dynamics of tourism development formed a priority relationship with the industry as one of the most steadily growing types of international economic activity. Research and analysis of the influence of periods of different favourable conditions on changes in the statistical data of the global tourism industry is important for economic forecasting, as modern international tourism is one of the most important factors of socio-economic development for most countries.

2. Theoretic framework.

A preliminary analysis of international tourism business research indicates that the issue of the influence of factors of global instability on the development of international tourism has been studied somewhat eccentrically without considering the multifactorial nature of possible factors (Gozgor, 2024).

Khalid and Okafor (2024) examined the impact of sanctions on the exchange of tourist flows regarding geographic proximity and deterrent factors. This study's results prove that sanctions negatively impact bilateral tourist flows, but geographical proximity and common religion can moderate the effects to some extent.

Studies on international tourism flows are often conducted using statistical data on tourist arrivals and tourism revenues. Therefore, international tourist arrival data are important for destination management and marketing because they allow for target audience analysis, seasonal fluctuations, and the positioning of specific regions, which helps to adapt marketing strategies.

According to network analysis using international tourist arrival data, the density of international tourist flows in countries and regions of Europe, East Asia, and North America offers implications for destination management and marketing (Shao et al., 2020).

The socioeconomic development of underdeveloped regions is closely related to the policy of social exchange. The interaction of public institutions with tourism businesses improves the experience of promoting regional tourism resources (Bazaluk et al., 2022; Robina-Ramírez et al., 2024).

The travel and tourism industry has undergone significant changes due to the COVID-19 epidemic and the rapid development of digital technologies, which are caused by the states' restrictive (protective) measures (Yepez & Leimgruber, 2024). Climatic shocks and droughts negatively affect international trade in tourism services; however, sustainable tourism and effective management by travel companies can mitigate the effects by reducing the impact and economic consequences (McCarroll, 2024).

Sustainable tourism development policies that rely on renewable energy consumption enhance economic benefits and catalyse economic growth in developing countries (Aboagye & Kwakwa, 2023). The study by Pidgirna & Filipchuk (2020) proves a close relationship between the well-being of the population and the profits of the tourism business, emphasising the significant contribution to the formation of the country's gross domestic product.

3. Methodology.

The research involves the application of general scientific and specific methods, which include collecting and processing statistical data from various sources to determine qualitative and quantitative retrospective variables based on which graphic materials were built. Forecasts of possible indicators (growth of benchmark indicators of international arrivals to Ukraine) were made using the model proposed in the strategy for the development of tourism and resorts for the period until 2026 (Cabinet of Ministers of Ukraine, 2017) and used as benchmark data for 2013 when the territorial integrity of the country was not violated.

The method of systemic analysis was applied (identification of key trends and asymmetries of development in the international tourism industry), structural analysis (to study the position of Ukraine in the market of international trade in tourist), analysis and synthesis, comparison, and systemic generalisation (to determine the most optimal ways of development). Analysing indicators of international tourist arrivals and incomes in terms of global distribution into the Global South and North allows for identifying the main trends and asymmetries in the international tourism industry. A detailed study of geopolitical factors and statistical data obtained from open sources helps to determine those influencing regional tourism prospects.

4. Results.

From 1995 to the start of the COVID-19 pandemic in 2020, the average annual growth in international tourist arrivals was more than 4 per cent, with the highest figure of 1.46 billion people recorded in 2019. Over the estimated period from 1995 to 2023, the average arrival rate decreased to 2.46 per cent owing to the pandemic and outbreaks of military conflicts (Fig. 1). According to the UNWTO (2024), the full recovery of the arrival of international tourists to the level of 2019 is expected as early as 2024 and if the dynamics of growth are maintained before the pandemic. It is possible to reach the arrival level of 1.8 billion people by 2030 (World Tourism Organisation 2021).

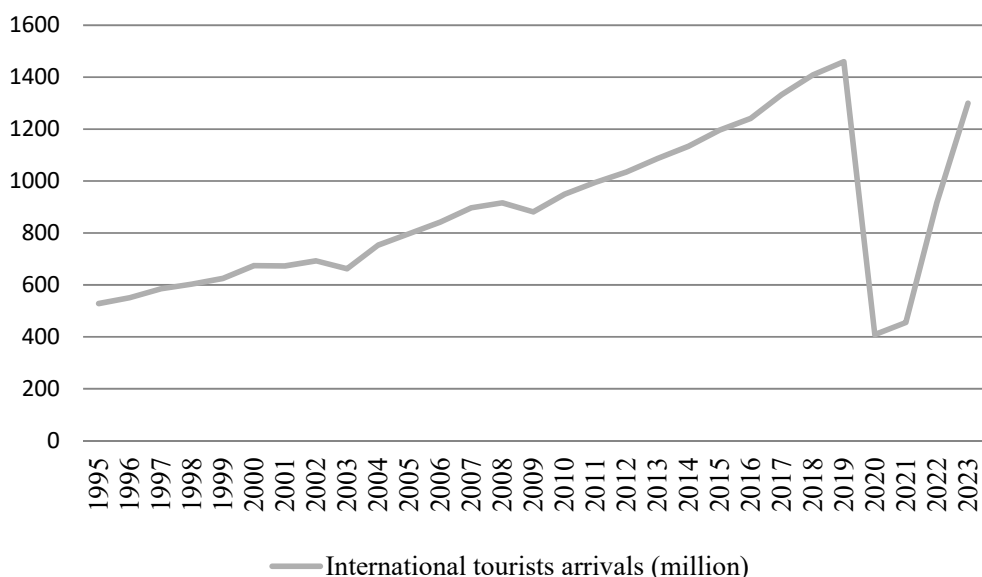


Figure 1. Statistics of arrivals of international tourists, 1995-2023.

Source: based on the World Tourism Organization (2024).

The rapid dynamics of the recovery of the industry after the COVID-19 pandemic indicates the stability of the industry and the high potential for continued growth under favourable conditions, which are reflected in UN General Assembly Resolution 70/1 (United Nations, 2015), which outlined 17 goals and objectives for achieving sustainable development (SDG) by 2030.

According to the UNWTO (2024) report, sustainable tourism meets or appears in most SDGs. Some aspects of the current activities of the private sector in the field of tourism contribute to addressing the issues related to the SDGs of “Reducing Inequality” and “Sustainable Cities and Communities” (Fig. 2) (United Nations World Tourism Organization, 2018)..



Figure 2. The relationship between sustainable tourism and the SDGs.

Source: based on the United Nations World Tourism Organization (2018).

In the deepening of fundamental factors, such as the technological gap of developed countries, the division of regions in the international tourism system is deepening. The current climate crisis, the devastating consequences of which have already been felt by the Middle East and South African countries, strengthens global migration processes. Accusations that the economic activities of the leading countries of the Global North have led to catastrophic climate change while the poorest countries of the Global South suffer the consequences may become another cornerstone in the relationship between the two global world camps (Arab Center Washington DC, 2022). It is worth noting the characteristic tendency to increase international tourist arrivals in Southeast Asia and the Pacific region, which are the primary makers of international tourist flows among the countries of the Global South (World Tourism Organization, 2011). From 1999 to 2019, the share of international tourist arrivals in these countries increased from 30 to 40%. North America and Europe lost approximately 10% of their total volume of international tourist arrivals (Fig. 3).

It should be noted that this trend is heterogeneous because the characteristic growth dynamics for different regions are significantly different over the specified twenty-year period. For example, the United States and Canada increased by 215 per cent, Europe by 196 per cent, and Southeast Asia and the Pacific region achieved an impressive growth of 296 per cent. It is also necessary to point out the significant potential for the development of outbound tourism in countries such as China, India, and other countries in the Global South, which is associated with an increase in the population's well-being level. In the near term, the realisation of this potential is restrained by the implementation of severe restrictions during the COVID-19 pandemic, which has significantly reduced travel opportunities and slowed the recovery dynamics in 2023 and 2024. During the pandemic, the number of valid foreign passports decreased, and issuing new documents may require more administrative resources or more extended deadlines. In addition, the number of Chinese citizens who can obtain a foreign passport for the first time still exceeds one billion.

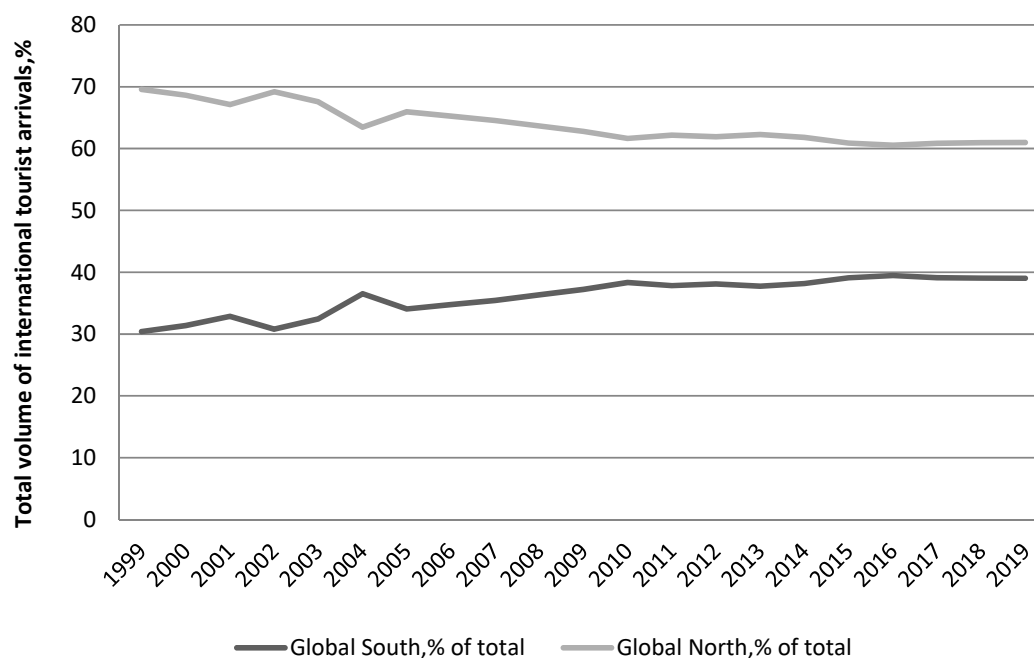


Figure 3. Changes in the volume of arrivals of international tourists in 1999-2019.

Source: based on UNWTO data (2024).

Further growth of international tourist activity in the countries of the Global South will be ensured by the gradual easing of visas and cross-border restrictions between China and the countries of the Middle East, the UAE, Qatar, the Seychelles, and some African countries, which have become possible thanks to the initiative of "One Belt, One Road" (The Straits Times, 2023). Another reason for the redistribution of international tourist flows towards the Global South is the restrictions associated with the ongoing trade disputes between the USA, Europe, and China, which can potentially lead to the emergence of visa and administrative barriers, as was already the case in 2018 and 2019 when the number of visits to the United States by Chinese tourists decreased by 11 per cent compared to that in 2017.

According to the UNWTO, the full recovery of the pre-pandemic volumes of world trade in tourist services is expected only in 2024, so the distribution of real income from world tourism is best viewed using the example of 2019—the last year of steady growth in the industry. The Middle East and Africa, which, before the pandemic, collectively generated only 8% of income from world tourism, fully recovered in 2024 and showed an increase in

tourist flows by 36% and 5%, respectively (Fig. 4) (World Tourism Organization, 2024). The pressure on the development of international tourism in the region continues to be exerted by a combination of negative factors, including the low level of tourism infrastructure development, the insufficient level of security for tourists, climatic changes, namely, periods of abnormal heat or the danger of storms, and the threat of flooding. Traditionally, for the American tourism market, the lion's share of income from international tourism, namely 72% of all income, has accumulated in North America. Of the remaining 28% of revenue, the majority came from the Caribbean and South America. The realisation of the tourist potential of most Central American countries remains low because of insufficient infrastructural development and low economic indicators. The European continent generated 39% of global revenue from international tourism in 2019 and continues to hold a leading position in the formation of global tourism products. The interim results of 2024, according to which the number of international arrivals to Europe exceeds 2019 by 2%, make it possible to forecast the final annual level of recovery for the entire international tourism industry (World Tourism Organization, 2024).

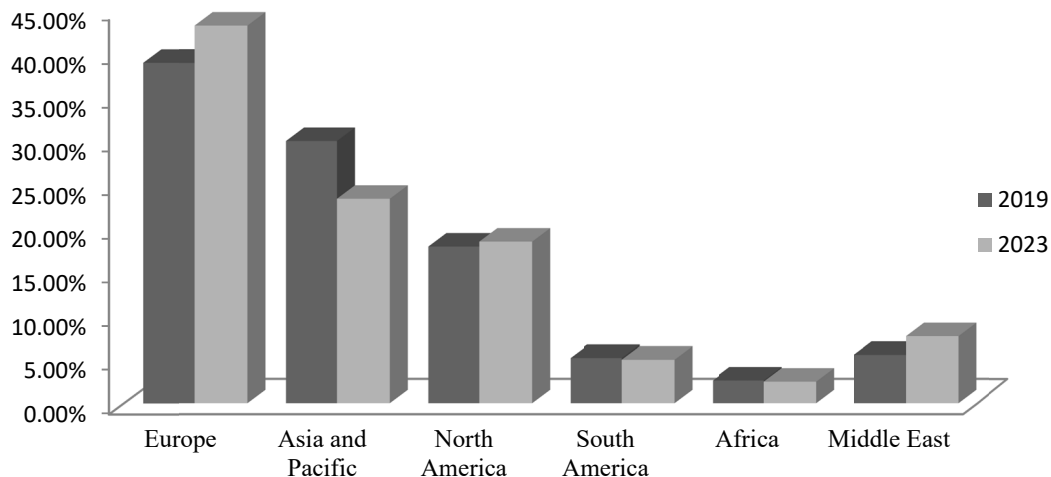


Figure 4. Comparison of revenues from international tourism in 2019 and 2023, in percentage.

Source: based on the World Tourism Organization (2021, 2024).

The general trend towards an increase in the share of world tourism for developing countries corresponds to the growth in tourism indicators in the Middle East, Asia, North Africa, and the Pacific Basin. The corresponding infrastructure investments in many countries have confirmed this general trend. In this context, Saudi Arabia's "Vision 2030" development program, this includes the innovative project of the resort region NEOM and total investments of more than 1 trillion US dollars (Neom, 2019).

By 2030, it is planned to develop several areas on the shores of the Red Sea and in the north-western part of the country, including airport and port infrastructure.

The peculiarity of the NEOM project is the desire to create autonomous energy-independent ecological zones for residences and businesses for nine million inhabitants while preserving 95 per cent of the natural landscape. The basis of the project—LINE City, a linear skyscraper 500 meters high and 170 kilometres long—caused a lively discussion about the impact on the environment and climate in expert circles. Implementing the project will attract up to 500 billion US dollars in public and private investments. Currently, the project implementation raises many questions due to significant climatic shifts and rising temperatures in the region, which are especially noticeable in the summer.

The greatest potential for developing international tourism in the European subregion is possessed by Eastern European countries, mainly those that were part of the former Soviet bloc. The dominant factors determining the potential for growth include improving transport infrastructure, European integration processes, legislative regulation of aspects of international tourism cooperation, diversity, and a high level of historical, architectural, and cultural heritage preservation.

Growing demand may lead to problems such as a shortage of skilled workers, imbalances in energy prices, excessive competition, and dumping. Tension caused by the artificial migration crisis on the eastern borders of the EU is evident. Baltic countries and Poland are forced to implement restrictive measures in border areas. Further, additional inspections of compliance with migration legislation and passport control at the internal borders of the EU are increasingly being carried out, which may pose obstacles to cross-border cooperation and have long-term consequences for tourist traffic. In the context of prospects for the development of international tourism in Eastern Europe, it is necessary to mention the ongoing geopolitical tensions due to ethnic and religious contradictions in the Western Balkans region.

An analysis of income from international tourism in some countries of the region indicates positive dynamics and a significant difference in the level of income among countries that have chosen the European integration path of development (Fig. 5).

It should be noted that Slovenia is ahead of Serbia and Albania in terms of income from international tourism. However, the latter's historical, cultural and natural potential allows for much higher incomes. This is especially relevant now when many developed tourism economies in Europe are intensifying measures to overcome the consequences of excessive tourism.

In particular, neighbouring states are pressuring the authorities to limit mass tourism. Croatia is an example of the development of international tourism in the region despite the seasonal nature of travel for beach recreation. The further reduction of Russian influence in the Western Balkans will activate the processes of European integration for most of the countries of the region, which will have a positive impact on economic processes, international trade, investment climate, and border cooperation, opening new perspectives for the development of international tourism throughout Eastern Europe.

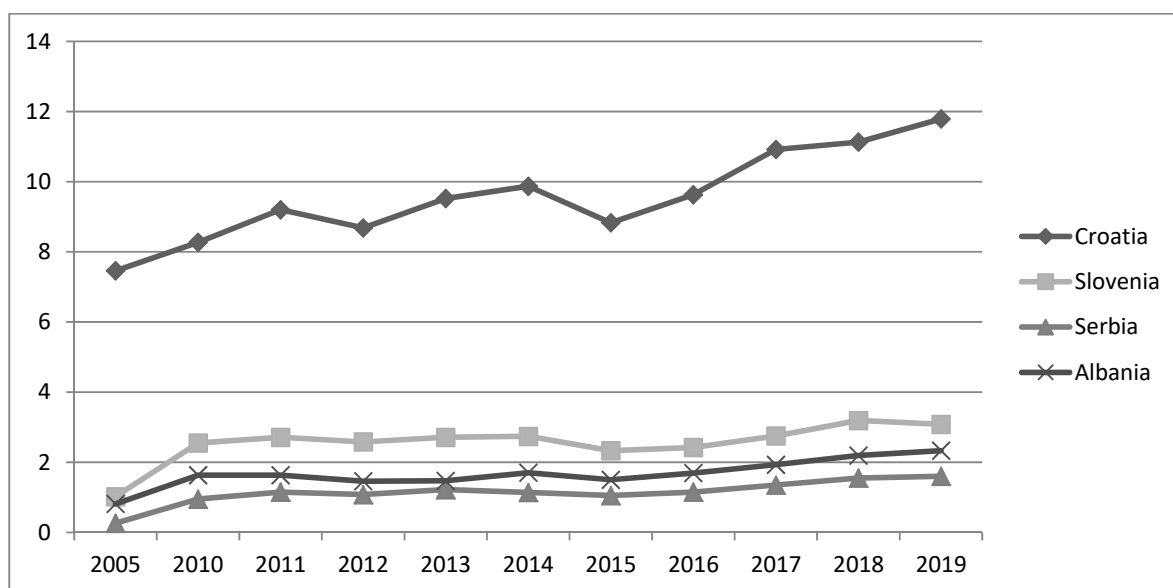


Figure 5. Income from international tourism in the Western Balkans in 2005-2019, billion dollars USA.

Source: based on the UNWTO source (2024).

According to the geographical classification proposed in the report on the competitiveness of travel and tourism in 2019, Ukraine belongs to the European macro-region and is considered a Eurasian country next to East Eurasian states. According to the rating of competitiveness of travel and tourism in 2019, Ukraine took 78th place with a score of 3.7 points, although in 2013, the country was in 60th place (World Economic Forum, 2019) (Figure 6).

According to the “Environment favourability” sub-index, Ukraine took 65th place, ahead of such countries as Moldova and Argentina. According to this sub-index, the closest Ukrainian neighbours, Poland, Hungary, and Romania, are ranked 45th, 42nd, and 51st.

According to the sub-index “Promotion of travel and tourism policy”, Ukraine scored 4.5 and was ahead of Italy, Montenegro and Great Britain while conceding to Slovakia.

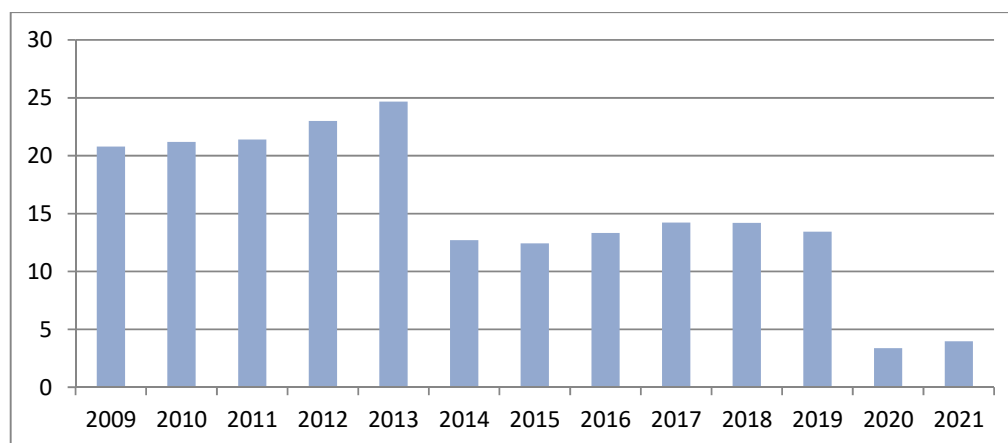


Figure 6. International arrivals to Ukraine, million people in 2009-2021.

Source: based on the UNWTO source (2024).

Ukraine received relatively high marks, which brings it closer to the pool of European states with consistently high indicators of the development of international tourism. Such indicators as “Air transport infrastructure”, “Land and port infrastructure”, “Natural infrastructure”, and “Cultural resources and business travel”, with corresponding scores of 2.7, 3.1, 2.2 and 1.9, affected the overall rating and moved Ukraine to lower positions.

State infrastructure modernization projects have been launched to improve its position and increase the country's competitiveness.

However, insufficient attention has been paid to improving natural infrastructure, developing cultural resources, and business tourism.

Ukraine is a subject of the international tourism industry with significant potential, which provides natural and landscape diversity, rich historical, architectural and cultural heritage, multinational ethnic identity and social capital. Despite such impressive development opportunities, the state's share in the world tourism market has always remained insignificant (Table 1).

Table 1. The share of Ukraine in the world tourism market, in 2001 – 2019.

Year	The number of arrivals of foreign citizens to Ukraine, million people	Corresponding deviation to the previous year, %	Share in the world tourism market, %	Revenues from tourism (million US dollars)
2001	9,174	-	1,32	2699
2002	10,516	14,63	1,5	2992
2003	12,513	18,99	1,81	2930
2004	15,629	24,90	2,05	2560
2005	17,63	12,8	2,17	3125
2006	18,935	7,4	2,23	3485
2007	23,122	22,11	2,56	4597
2008	25,449	10,06	2,73	5768
2009	20,798	-18,27	2,33	3576
2010	21,203	1,95	2,22	3788
2011	21,415	1	2,12	4294
2012	23,012	7,46	2,2	4842
2013	24,671	7,21	2,25	5083
2014	12,711	-48,48	1,11	1612
2015	12,428	-2,22	1,03	1082
2016	13,333	7,28	1,07	1078
2017	14,229	6,72	1,06	1261
2018	14,342	0,79	1,02	1445
2019	13,709	-4,41	0,94	1620

Source: based on The State Agency for Tourism Development of Ukraine (2021); State Statistic Service of Ukraine (2016).

In 2008, its share of Ukraine in the world tourism market reached the highest figure of 2.73 per cent, after which the global economic crisis caused a decline. Regional armed confrontations and accompanying crisis phenomena do not contribute to tourism development and the growth of international travel. The state's global market indicators remained stably low until the COVID-19 pandemic. Thus, according to the data of the State Agency for Tourism Development (2024), tourist tax fees in the first half of 2024 increased by 50 per cent compared to similar indicators in 2022 and 2023. According to UNWTO reports, in 2023, Ukrainians' spending on international tourism increased by 108 per cent compared to 2019 (World Tourism Organization, 2024).

The reduction in tourism due to military action is consistent with similar losses in other trade sectors, mainly e-commerce, which recorded a 12-fold decline in 2022 compared to previous years (Shlapak et al., 2023).

The current provisions of the strategy for developing tourism and resorts until 2026 foresee an increase in the number of foreign tourists entering Ukraine (Cabinet of Ministers of Ukraine (2017)). The development of this growth strategy took place to the existing economic and political realities and did not foresee the possibility of recovery indicators of the number of foreign tourist arrivals, taking into account the indicators of 2013. The tourism development strategy cannot exclude the possibility of planning recovery volumes, taking into account the latest indicators, according to which the number of foreign tourists entering Ukraine in 2026 could be 61.67 million people (Fig. 7).

The average value between the indicators of 2013 and 2015 takes into account several potential factors for the reduction of international tourism development, namely, insufficient level of security and protection, negative perception of the destination among foreign tourists, infrastructural limitations in several regions, failure to achieve the goals of complete de-occupation of the captured territories.

The model depicted in Figure 7 can be used in future planning of international tourist arrivals to Ukraine after hostilities, using the number of years to reach the indicator in parentheses. Issues of security and perception of the destination are indicated as the main ones in

several modern studies devoted to the recovery of tourism activities immediately after armed conflicts and in the coming years after them.

Thus, stabilising the security situation in the shortest possible time while achieving the pre-conflict level is one of the most critical tasks for many interested parties in the public administration system. The negative perception of the destination in the minds of consumers is closely related to issues of security and protection of peaceful life in the country. Therefore, rethinking perceptions will not be quick, and their activation requires significant informational work at all levels (Tananaiko et al., 2023). Issues of security and perception of the destination are indicated as the main ones in several modern studies devoted to the recovery of tourism activities immediately after armed conflicts and in the coming years after them.

Thus, stabilising the security situation in the shortest possible time while achieving the pre-conflict level is one of the most critical tasks for many interested parties in the public administration system. The negative perception of the destination in the minds of consumers is closely related to issues of security and protection of peaceful life in the country. Therefore, rethinking the perception process will take time, and their activation requires significant information work at all levels. The existing provisions of the strategy for developing tourism and resorts from 2017 have partially lost their relevance due to several negative factors that have continued since 2020.

Its revision, taking into account new circumstances and challenges, is a relevant and necessary step for the functioning of the tourism industry of Ukraine in conditions of future peace. In particular, one of the priority tasks in the direction of "Development of tourist infrastructure" is the legislative definition of the concept of "tourist region", based on which it is advisable to create zones with special economic conditions taking into account the specifics of each of them, to develop a system of interconnected tourist clusters of local, regional and national level. It will scale the manufacture of tourist products, specialised and related goods by market needs, and ensure the preservation of healthy competition in the industry and high-quality cultural exchange between the country's regions.

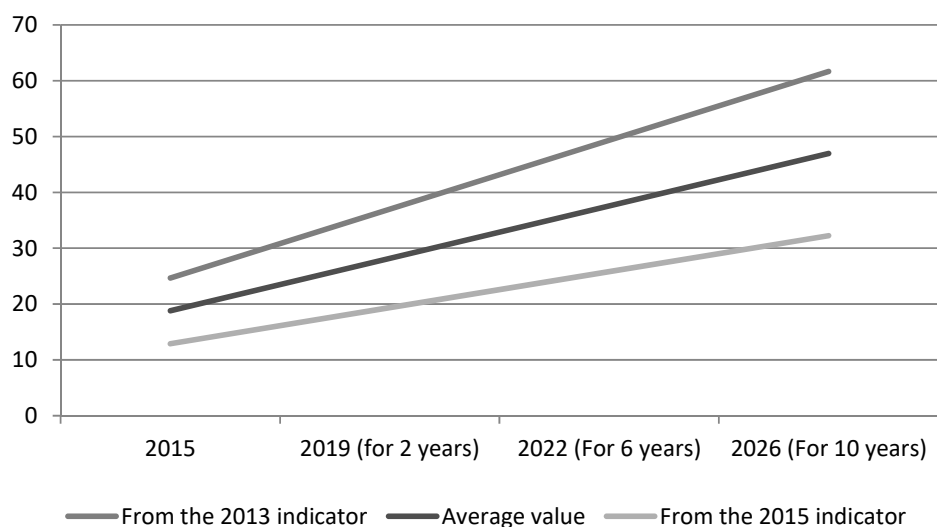


Figure 7. Growth of reference indicators of international arrivals to Ukraine, million people.

Source: based on the Cabinet of Ministers of Ukraine (2017).

A balanced approach to constructing domestic tourism infrastructure will increase the efficiency of the distribution of state funding, allow focus on the most necessary projects for the tourism industry, and create an attractive investment climate.

An equally important step is an integrated approach in developing state programs for the development of transport infrastructure, taking into account the development of tourist regions and their anthropogenic specifics, as well as the necessary changes in the strategy of exporting Ukrainian tourist services to the international market. Taking into account the Euro-Atlantic vector of the development of Ukraine's foreign policy, this strategy involves shifting efforts to promote tourist services and deepening cooperation in the tourism industry with European countries with an emphasis on the closest neighbours in Eastern Europe, expanding cross-border and border cooperation, building new overpasses, increasing the number and capacity checkpoints with the simultaneous liberalisation of customs formalities and passport checks.

The strategy for developing tourism and resorts pays special attention to the marketing policy, particularly the development and implementation of the marketing strategy to promote the national tourist product and the official tourism brand of Ukraine.

Among the latest updates in 2021, a new communication strategy for the promotion of the tourist brand of Ukraine was presented, in which the formats, ways of interaction and practical stages for creating a sustainable tourist image of Ukraine and systematic work on the activation of inbound tourism through means of communication and diplomatic channels are updated (Ministry of Foreign Affairs of Ukraine, 2021). Unfortunately, 2021 was the first and last year of the start of real estate investments in developing and promoting the industry on world markets. It is critically necessary to continue forming a positive image of Ukraine, during which it is crucial to strengthen internal security and restore international tourist activity in protected territories.

Alternative channels of information distribution, which include marketing in social media, cooperation with bloggers, content makers, and placing videos on video hosting sites, allow building an alternative promotion strategy with limited budget opportunities or with the involvement of indirect financial support, partner assistance, personal contacts in circles of influential persons, volunteer community (Fig. 8). Domestic studies emphasise the relevance of traditional marketing models in the global digital environment and demonstrate significant potential in combination with digital technologies (Tsyhankova, 2023).

Considering the further development of tourism in Ukraine, there is a need for regulatory improvement regarding the control of the activities of professional guides, especially the implementation of activities in Ukraine by foreign entities of tourism activity (Verkhovna Rada of Ukraine, 1995). The integration of Ukraine into the EU will require legislative

changes since economic entities of the single European economic zone have the right to carry out activities throughout the territory of the EU. In EU countries, travel agents who carry out intermediary activities, representing the interests of operators from foreign jurisdictions, provide increased financial support of civil liability to consumers of services (Semenova, 2019).

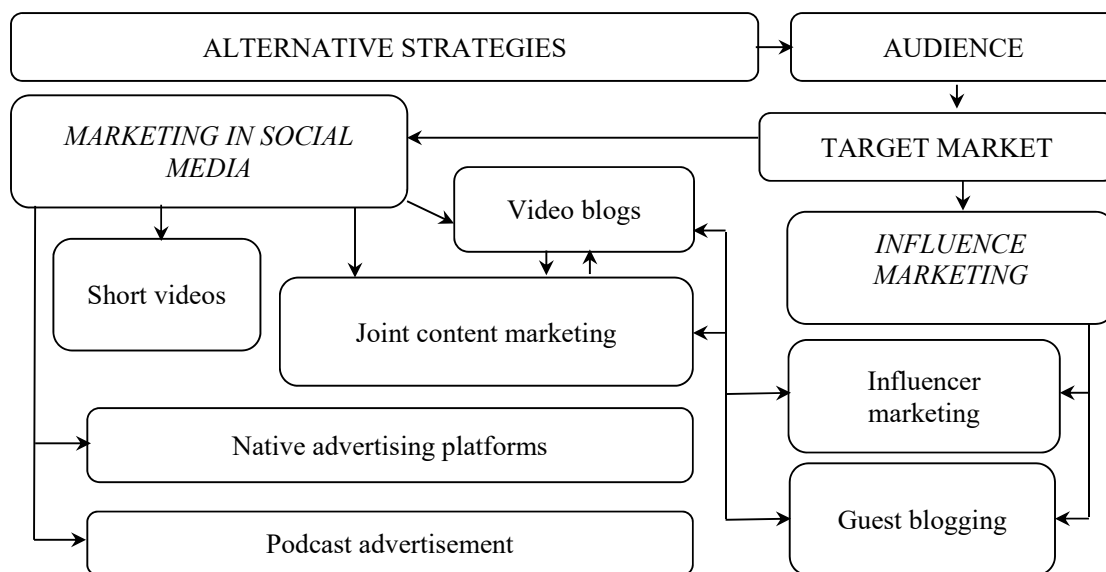


Figure 8. An alternative strategy for promoting the tourism brand of Ukraine on the international market.

6. Conclusions.

The tourism industry of Ukraine has a large and is yet to realize its growth potential fully. The study results indicate a global shift in international target markets where Ukraine can represent its interests towards the countries of Central and Eastern Europe, Southeast Asia and the Pacific region. Directing the development strategy towards the specified regions will increase tourist flows to and from Ukraine.

In the next ten years of the post-war period in Ukraine, an increase in foreign tourist arrivals is expected to reach 61 million people annually. Accordingly, to ensure this growth, it is necessary to fulfil several conditions related to restoring security and protecting the population, which will contribute to changing the negative perception of the destination for foreign tourists.

Transport infrastructure, which is deteriorating due to insufficient funding during hostilities, will also require significant attention. The post-war restructuring of transport arteries and facilities should take into account the need for its integration into the tourist infrastructure.

For a successful post-war recovery of the tourism industry, it is necessary to incessantly continue strategic projects to promote the national tourism product and brand in the target markets, especially in the countries of Central and Eastern Europe. To optimize costs due to limited budget opportunities, the study proposed an alternative promotion strategy based on the use of management tools in social media and the creation of thematic content for video hosting with the involvement of influential content makers.

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