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Totska Olesia

*Doctor of Economic Sciences, Full Professor,
Professor at the Department of Management
Lesya Ukrainka Volyn National University,
Vynnychenko str., 28, Lutsk, 43021, Ukraine,
e-mail: totska.olesia@vnu.edu.ua
ORCID ID: [0000-0003-4748-2134](https://orcid.org/0000-0003-4748-2134)*

Cooperation of Ukraine with EU countries in the sphere of tourism in the conditions of pandemic and martial state: analytical mix

Abstract. Ukraine's foreign trade in travel-related services with the EU has undergone a number of negative changes over the past five years. Its performance was affected by both the COVID-19 pandemic and the full-scale invasion of the Russian Federation in February 2022.

Problem statement. Since Ukraine is a candidate country for EU accession, and foreign trade in services affects the country's trade balance, the study of its export-import operations in the field of tourism with the EU is relevant and appropriate.

Unresolved aspects. The analysis method was used to study the dynamics of export-import operations in 2019–2024; cluster analysis was used to group EU countries by indicators of export of tourism services from Ukraine and import of similar services to Ukraine in 2019–2021. EU countries were grouped into five clusters.

Purpose of the article. The purpose of this article is to study the foreign economic cooperation of Ukraine and the EU countries in terms of trade in travel-related services.

Main material. During 2019–2024, the balance of foreign trade in tourism services between Ukraine and the EU was negative. In 2019–2021, Ukraine received the largest income from tourists from such EU countries as Cyprus, Germany, Italy, Poland. At the same time, Ukrainians spent the most money on trips to Cyprus and Malta.

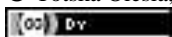
Conclusions. To improve the tourist attractiveness of Ukraine after the end of martial law, it is worth working in the following areas: 1) improving the regulatory framework in the field of hospitality; 2) developing tourism infrastructure – accommodation facilities, catering establishments, transport, communications; 3) training highly qualified personnel for the hospitality sector; 4) promoting domestic tourist attractions and Ukraine as a whole; 5) expanding the range of tourist services.

Keywords: *foreign trade, tourist services, Ukraine, EU countries, cluster analysis.*

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Introduction. Ukraine's foreign trade in travel-related services with the EU has undergone a number of negative changes over the past five years. Its performance was affected by both the COVID-19 pandemic and the full-scale invasion of the Russian Federation in February 2022. Since Ukraine is a candidate country for EU accession, and foreign trade in services affects the country's trade balance, the study of its export-import operations in the field of tourism with the EU is relevant and appropriate, particularly in the context of new challenges facing the state.

Literature review. Over the past five years, scientists have studied various aspects of the tourism sector in European countries, including: R. Anisiewicz (2021) – conditions for the development of the entrepreneurial ecosystem of regional tourism on the external border of the European Union, in Poland and at points of contact with two countries that are not members of the Union (Belarus, Ukraine) [1]; V. Boiko *et al.* (2021) – the actual state of gastronomic tourism in the EU and Ukraine [2]; L. Dima *et al.* (2024) – the impact of the global COVID-19 pandemic on the tourism industry [3]; U. Martyniuk *et al.* (2025) – key factors of the competitiveness of gastronomic tourism in the context of crisis phenomena based on the results of a survey of respondents in Ukraine and the EU countries of Eastern and Central Europe [4]; A. Parfinenko *et al.* (2022) – connections between the processes of European integration and the development of national tourism services markets, as well as promising directions for the development of international tourism in Eastern European countries – the Republic of Moldova and Ukraine [5]; P. Partlova *et al.* (2024) – the impact of political and security risks on tourism based on a case study of the Russian-Ukrainian conflict [6]; T. Pimonenko *et al.* (2021) – the interrelationships between economic, environmental and tourism development in Ukraine and the Visegrad Group countries [7]; A. Popescu (2021) – the impact of the COVID-19 pandemic on tourist flows in Romania [8]; M. Privarova *et al.* (2022) – the impact of migration, including labor migration, on tourist flows and the impact of tourist flows and migration on the labor market in both donor and recipient countries [9]; E. R. Rosca – main tourist regions in the EU Member States and their past and future contribution to the formation of national tourism demand based on the indicator of total tourist arrivals (domestic and foreign tourists) [10]; P. G. de Santos (2022) – relevance of the travel and tourism sector for the EU and the different impact of the pandemic compared to the impact on other world markets [11]; O. Totska (2023) – dynamics of financial indicators of export-import of travel-related services between Ukraine and the EU for 2014–2021, their favorable trends in the short term [14]; M. Trinajstić *et al.* (2022) – relationship between tourist overnight stays and energy consumption in the services sector in the 10 EU countries that achieved the highest number of overnight stays [16].

Purpose, objectives and research methods. The purpose of this article is to conduct an analytical study of the financial indicators of foreign economic cooperation between Ukraine and EU countries in the field of tourism during the COVID-19 pandemic and martial law using various methods.

Research objectives:

- 1) analysis of the dynamics of foreign trade in tourist services between Ukraine and the EU;
- 2) cluster analysis of EU countries by indicators of export of tourist services from Ukraine;
- 3) cluster analysis of EU countries by indicators of import of tourist services to Ukraine.

It should be noted that due to the military aggression of the Russian Federation against Ukraine, individuals, individual entrepreneurs, legal entities, starting from 2022, had the right to submit “accounting, financial, settlement, audit reports and any other documents, the submission of which is required in accordance with the legislation, in paper and/or electronic form, within three months after the termination or cancellation of martial law or a state of war for the entire period of failure to submit reports or the obligation to submit documents” (Law of Ukraine “On Protection of the Interests of Subjects of Reporting and Other Documents during the Period of Martial Law or a State of War”, 2022) [17]. Some respondents exercised this right and did not submit statistical and financial reporting in 2022–2025. Therefore, state statistics bodies could not form objective statistical information in full, in particular on foreign trade in services by country. However,

according to the amendments to the Law made in June 2025 [17], persons subject to statistical observation were obliged to submit to state statistics bodies and other producers of official statistics the unsubmitted statistical and financial reporting for the entire period of non-submission within three months (until October 2025). Thus, the State Statistics Service of Ukraine will be able to generate updated information already in 2026.

In this regard, the basis of our analysis will be data from the State Statistics Service of Ukraine on the annual volumes of foreign trade in services of Ukraine with countries of the world (by types of services) in 2019–2021 [12], the structure of foreign trade in services (by types) with EU countries in 2022–2024 [13].

The following methods will be used in the article: analysis – to study the dynamics of foreign trade in tourist services between Ukraine and the EU in 2019–2024; cluster analysis (K-means method) – to group EU countries by indicators of export of tourist services from Ukraine and import of similar services to Ukraine in 2019–2021 (since newer information on the website of the State Statistics Service of Ukraine will be available in 2026). Note that when applying the K-means method, K random clusters are selected, located at the greatest possible distance from each other, and then the belonging of objects to them changes so as to:

- 1) minimize variability within clusters;
- 2) maximize variability between clusters.

That is, in this case, it is necessary to specify in advance the number of clusters that we want to obtain [15, 29].

In our case, we will group EU countries into five clusters with the following level of export and import indicators:

- 1) cluster 1 – high;
- 2) cluster 2 – above average;
- 3) cluster 3 – average;
- 4) cluster 4 – below average;
- 5) cluster 5 – low.

Research results. 1. *Analysis of the dynamics of foreign trade in tourist services between Ukraine and the EU*

To analyze the dynamics of financial indicators of export-import of tourist services between Ukraine and the EU, Table 1 was constructed.

Table 1. Volumes of foreign trade of Ukraine with EU countries in travel-related services, thousand US dollars

Year	Export	Import	Balance (+, -)
2019	52,611.1	506,644.8	-454,033.8
2020	29,620.6	246,291.0	-216,670.4
2021	48,269.0	521,026.0	-472,757.0
2022	18,550.1	88,634.5	-70,084.3
2023	22,382.9	193,209.4	-170,826.5
2024	42,510.9	303,686.7	-261,175.9

Source: compiled by the author based on data from the State Statistics Service of Ukraine (2025a, 2025b) [12; 13].

According to Table 1, the volume of exports and imports of travel-related services fell sharply in 2020, which is associated with the COVID-19 pandemic. In 2021, the figures increased significantly, with imports even exceeding the level of 2019. But already in 2022, after the full-scale invasion of the Russian Federation into the territory of Ukraine, export and import figures became lower even than the figures of the pandemic period in 2020. Although in the following 2023–2024, the volume of export-import tourism operations between Ukraine and the EU increased annually, it has not yet been possible to reach the level of 2019.

Analyzing the dynamics of the balance of foreign trade in tourism services between Ukraine and the EU, we see that in the analyzed period it was negative annually. This indicates a lower competitiveness of domestic tourism services compared to services provided by EU countries, as well as an outflow of foreign currency from Ukraine.

2. *Cluster analysis of EU countries by indicators of export of tourist services from Ukraine*

To conduct a cluster analysis of EU countries by indicators of export of tourist services from Ukraine, Table 2 was constructed.

Table 2. *Ukraine's foreign trade with EU countries in travel-related services (exports), thousand US dollars*

EU Country	2019	2020	2021	Average
Austria	1,757.9	214.2	474.7	815.6
Belgium	1,184.8	254.9	412.3	617.3
Bulgaria	1,469.6	1,536.3	2,336.1	1,780.7
Croatia	200.0	75.2	108.4	127.8
Cyprus	5,763.8	6,602.5	6,743.2	6,369.8
Czechia	801.1	318.0	5,945.7	2,354.9
Denmark	660.9	168.2	410.9	413.3
Estonia	664.5	205.7	766.7	545.7
Finland	678.1	287.1	383.5	449.6
France	4,549.2	2,048.9	2,904.8	3,167.6
Germany	6,147.3	3,655.5	5,716.7	5,173.2
Greece	1,659.8	482.1	799.6	980.5
Hungary	805.9	359.1	655.5	606.8
Ireland	436.0	562.6	1,166.3	721.6
Italy	5,515.4	3,604.9	4,502.3	4,540.8
Latvia	1,122.3	592.5	618.7	777.8
Lithuania	1,737.8	529.7	863.4	1,043.6
Luxembourg	174.0	35.1	168.7	125.9
Malta	402.0	116.7	1,349.8	622.9
Netherlands	1,941.0	947.7	1,825.2	1,571.3
Poland	10,295.6	3,473.3	4,390.1	6,053.0
Portugal	287.4	144.3	256.9	229.5
Romania	990.1	718.9	1,645.0	1,118.0
Slovakia	474.4	234.9	499.2	402.8
Slovenia	208.7	175.0	239.5	207.8
Spain	1,525.7	1,747.8	2,265.6	1,846.4
Sweden	1,157.9	529.8	820.4	836.0

Source: compiled by the author based on data from the State Statistics Service of Ukraine (2025a) [12].

According to Table 2, cluster 1 with a high level of Ukrainian export indicators includes four EU countries: Cyprus, Germany, Italy, Poland. In 2019–2021, citizens of these countries received Ukrainian travel-related services for an average of more than 4.5 million USD annually.

Cluster 2 with an above-average level of Ukrainian export indicators also includes four EU countries: Bulgaria, Czechia, France, and Spain. On average, during the analyzed period, Ukraine exported tourism services there annually in the range of 1.8–3.2 million USD.

Cluster 3 with an average level of Ukrainian export indicators includes seven EU countries: Austria, Belgium, Greece, Latvia, Lithuania, the Netherlands, and Sweden. Representatives of these countries spent an average of 0.6 to 1.6 million USD on tourism services in Ukraine annually.

Cluster 4 with a level of Ukrainian export indicators below the average united five EU countries: Estonia, Hungary, Ireland, Malta, Romania. In the analyzed period, Ukraine annually exported tourist services there on average from 0.5 to 1.1 million USD.

Cluster 5 with a low level of Ukrainian export indicators included seven EU countries: Croatia, Denmark, Finland, Luxembourg, Portugal, Slovakia, Slovenia. Citizens of these countries received Ukrainian tourist services on average annually within the range of 0.1–0.4 million USD.

The dynamics of the average values of these clusters in 2019–2021 is presented in Figure 1. As we can see, it is identical for each group of countries: a decrease in Ukrainian export indicators in 2020 and an increase in 2021. Note that the average indicators of clusters 2 and 4 in 2021 even exceeded the level of 2019.

3. Cluster analysis of EU countries by indicators of import of tourist services to Ukraine

To conduct a cluster analysis of EU countries by indicators of import of tourist services to Ukraine, Table 3 was constructed.

According to Table 3, only two EU countries were included in cluster 1 with a high level of import indicators to Ukraine by a huge margin: Cyprus and Malta. Ukrainians spent an average of more than 121 million USD annually on trips to these countries in 2019–2021.

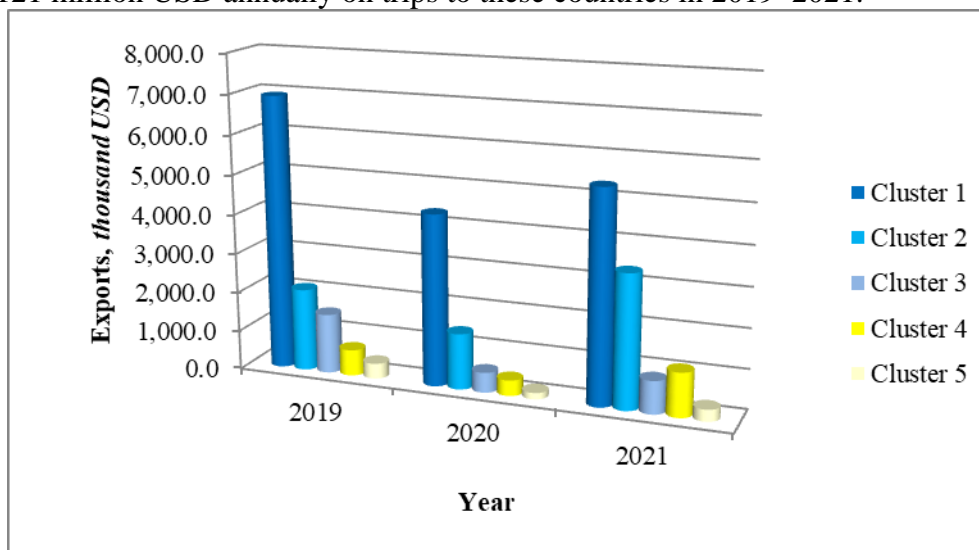


Figure 1. Dynamics of average values of clusters by indicators of export of tourist services from Ukraine to the EU
Source: Author's development based on data from Table 2.

Table 3. Ukraine's foreign trade with EU countries in travel-related services (imports), thousand USD

EU Country	2019	2020	2021	Average
Austria	4,568.4	2,694.3	3,316.7	3,526.5
Belgium	2,246.2	1,747.7	2,238.8	2,077.6
Bulgaria	10,882.9	4,014.4	37,666.9	17,521.4
Croatia	3,965.7	2,983.2	7,828.3	4,925.7
Cyprus	161,122.0	64,457.3	137,440.1	121,006.5
Czechia	9,296.3	4,701.8	4,651.8	6,216.6
Denmark	1,944.8	695.3	912.6	1,184.2
Estonia	4,123.6	1,931.6	2,405.8	2,820.3
Finland	2,087.8	944.1	1,078.2	1,370.0
France	10,291.7	4,173.2	6,827.3	7,097.4
Germany	17,679.5	12,528.9	12,732.6	14,313.6
Greece	27,673.9	2,888.5	30,516.6	20,359.7
Hungary	4,286.4	2,120.4	3,805.5	3,404.1
Ireland	394.1	119.8	179.0	231.0
Italy	20,904.3	7,494.4	8,061.8	12,153.5
Latvia	10,175.3	1,928.8	1,432.5	4,512.2
Lithuania	3,965.3	1,558.6	1,656.0	2,393.3
Luxembourg	139.3	32.7	50.1	74.0
Malta	154,797.4	100,285.4	211,153.1	155,412.0
Netherlands	4,049.0	2,273.9	2,983.7	3,102.2
Poland	23,367.2	18,529.4	26,441.6	22,779.4
Portugal	1,609.6	556.3	853.6	1,006.5

Table 1. (continued)

EU Country	2019	2020	2021	Average
Romania	2,099.0	1,089.1	1,470.8	1,553.0
Slovakia	1,458.5	695.5	1,051.0	1,068.3
Slovenia	1,249.8	466.2	614.4	776.8
Spain	21,497.1	4,534.7	12,636.7	12,889.5
Sweden	770.0	845.3	1,021.0	878.8

Source: Compiled by the author based on data from the State Statistics Service of Ukraine (2025a) [12].

Cluster 2 with above-average import indicators to Ukraine united three EU countries: Bulgaria, Greece, Poland. Their import of tourist services to Ukraine was within 17.5–22.8 million USD.

Cluster 3 with average import indicators to Ukraine included three EU countries: Germany, Italy, Spain. Here, Ukrainians spent an average of 12.2–14.3 million USD on travel annually.

Cluster 4 with below-average import indicators to Ukraine united six EU countries: Austria, Croatia, Czechia, France, Hungary, Latvia. Their import of tourist services to Ukraine was within 3.4–7.1 million USD.

Cluster 5 with low import indicators to Ukraine includes as many as 13 EU countries: Belgium, Denmark, Estonia, Finland, Ireland, Lithuania, Luxembourg, the Netherlands, Portugal, Romania, Slovakia, Slovenia, Sweden. Here, Ukrainians spent an average of 0.07–3.1 million USD on travel annually.

The dynamics of the average values of these clusters in 2019–2021 are presented in Figure 2. As we can see, each of the five groups also experienced a decrease in import indicators in 2020 and an increase in 2021. In clusters 1 and 2, the average indicators in 2021 exceeded the level of 2019. That is, after the COVID-19 pandemic, tourism in both directions increased significantly: from Ukraine to the EU and from the EU to Ukraine.

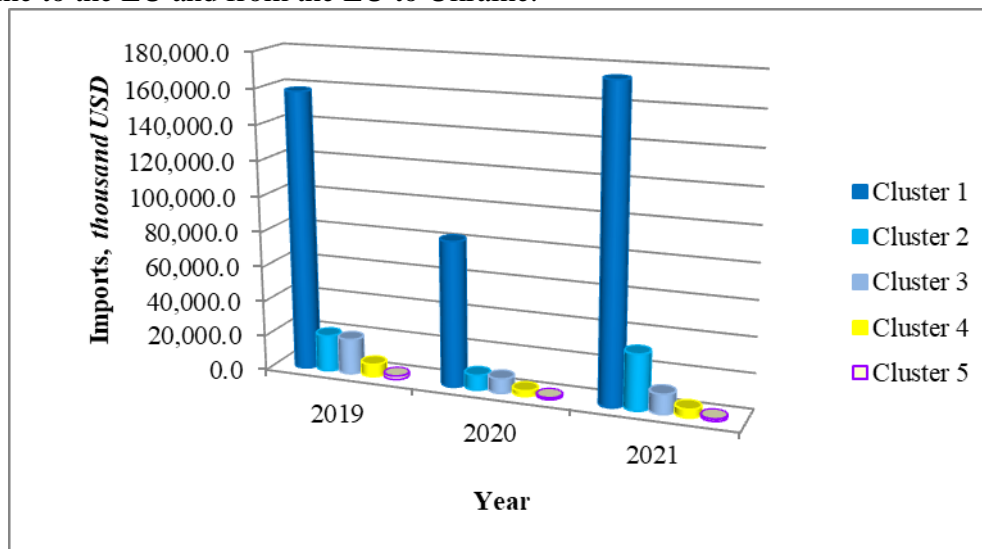


Figure 2. Dynamics of average values of clusters by indicators of import of tourist services from the EU to Ukraine
Source: Author's development based on data from Table 3.

Discussion. The combination of analysis and cluster analysis methods made it possible to study both the dynamics and the structure of foreign trade in tourist services between Ukraine and the EU countries. At the same time, the use of a probabilistic forecasting method, which is based on the use of the Poisson distribution law, in [14] made it possible to identify favorable trends in similar indicators based on data for 2014–2021. That is, having a set of certain data, in particular on trade in services between Ukraine and the EU countries, it is possible, by applying one or more methods, to obtain results for the implementation of the research objectives. We see further research

into the tourism sector of Ukraine in the analysis of updated data on tourist flows with individual EU countries.

Conclusions. After 2019, Ukraine's foreign trade in travel-related services with the EU was negatively affected by both the COVID-19 pandemic and the full-scale invasion of Ukraine by the Russian Federation. During 2019–2024, the balance of foreign trade in tourism services between Ukraine and the EU was negative.

In 2019–2021, Ukraine received the largest income from tourists from such EU countries as Cyprus, Germany, Italy, and Poland (from each an average of over 4.5 million USD annually). At the same time, Ukrainians spent the most money on trips to Cyprus and Malta (from each an average of over 121 million USD annually).

The smallest financial flow from tourism to Ukraine was observed from such EU countries as Croatia, Denmark, Finland, Luxembourg, Portugal, Slovakia, Slovenia (each within the range of 0.1–0.4 million USD annually). In turn, Ukrainians in the analyzed period spent the least money on trips to Belgium, Denmark, Estonia, Finland, Ireland, Lithuania, Luxembourg, the Netherlands, Portugal, Romania, Slovakia, Slovenia, Sweden (each on average 0.07–3.1 million USD annually).

To improve the tourist attractiveness of Ukraine after the end of martial law, it is worth working in the following areas:

- 1) improving the regulatory framework in the field of hospitality;
- 2) developing tourism infrastructure – accommodation facilities, catering establishments, transport, communications;
- 3) training highly qualified personnel for the hospitality sector;
- 4) promoting domestic tourist attractions and Ukraine as a whole;
- 5) expanding the range of tourist services.

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Тоцька Олеся

доктор економічних наук, професор,
професор кафедри менеджменту
Волинський національний університет імені Лесі Українки,
вул. Винниченка, 28, м. Луцьк, 43021, Україна,
e-mail: totska.olesia@vnu.edu.ua
ORCID ID: [0000-0003-4748-2134](https://orcid.org/0000-0003-4748-2134)

Співпраця України з країнами ЄС у сфері туризму в умовах пандемії та військового стану: аналітичний мікс

Анотація. Зовнішня торгівля України з країнами ЄС послугами, пов'язаними з подорожами, упродовж останніх п'яти років зазнала низки негативних змін. На її показники вплинули як пандемія COVID-19, так і повномасштабне вторгнення російської федерації у лютому 2022 р.

Постановка проблеми. Оскільки Україна є країною-кандидатом на вступ до ЄС, а зовнішня торгівля послугами впливає на торговельний баланс країни, то дослідження її експортно-імпорتنих операцій у сфері туризму з країнами ЄС є актуальним і доречним.

Нерозв'язані аспекти. Використано метод аналізу для дослідження динаміки експортно-імпорتنих операцій в 2019–2024 рр.; кластерний аналіз – для групування країн ЄС за показниками експорту туристичних послуг з України й імпорту аналогічних послуг в Україну в 2019–2021 рр. Країни ЄС було згруповано у п'ять кластерів.

Мета статті. Метою цієї статті є вивчення зовнішньоекономічної співпраці України та країн ЄС в частині торгівлі послугами, пов'язаними із подорожами.

Основний матеріал. Упродовж 2019–2024 рр. сальдо зовнішньої торгівлі туристичними послугами між Україною та ЄС було від'ємним. В 2019–2021 рр. Україна отримала найбільший дохід від туристів із таких країн ЄС як Кіпр, Німеччина, Італія, Польща. Водночас українці найбільше коштів витратили на подорожі до Кіпру та Мальти.

Висновки. Для покращення туристичної привабливості України після завершення воєнного стану варто працювати в таких напрямках: 1) удосконалення нормативно-правової бази у сфері гостинності; 2) розвиток туристичної інфраструктури – об'єктів розміщення, закладів харчування, транспорту, зв'язку; 3) підготовка висококваліфікованих кадрів для сфери гостинності; 4) промоція вітчизняних туристичних об'єктів і України в цілому; 5) розширення спектру туристичних послуг.

Ключові слова: зовнішня торгівля, туристичні послуги, Україна, країни ЄС, кластерний аналіз.

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