

<https://doi.org/10.36818/1562-0905-2024-2-5>

UDC 332.146:338.45

JEL O13, Q26, R58

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## **Competitiveness of the tourism and recreation sector in the Carpathian region of Ukraine: the impact of the COVID-19 pandemic and martial law**

*The article presents the assessing of the competitiveness of the tourism and recreation sector of the Carpathian region of Ukraine at the national level. It addresses the consequences of the impact of the COVID-19 pandemic and Russian military aggression on the change in the competitive position of the tourism and recreation sector in the Carpathian region. The article emphasizes a significant decrease in tourist and recreational flows and the number of functioning tourist and recreational facilities due to the pandemic and quarantine restrictions. During the pandemic, tendencies to replace the flow of foreign tourism with domestic tourism were evident, contributing to the rapid recovery of tourism and recreational activity in the Carpathian region over the next year due to the high capacity of interregional competitiveness of its tourism and recreation sector. The recovery process was interrupted by the Russian military aggression. The study shows the high competitiveness of the tourism and recreation sector of the Carpathian region in the postwar period and the possibility of further consideration of this sector among the priority goals in the development strategies of its oblasts.*

*Keywords: tourism and recreation sector, competitiveness, Carpathian region, tourism and recreation activities, COVID-19, martial law.*

**Problem statement.** The development of tourism and recreation has always been and will remain one of the strategic directions for the Carpathian region of Ukraine. This is emphasized in a number of international and national documents, including The Framework Convention on the Protection and Sustainable Development of the Carpathians [1], 2026 Tourism and Resorts Development Strategy [2], and The Mountainous Areas of the Ukrainian Carpathians Development Concept [3], etc. The prospects for the development of the tourism and recreation sector are determined by the natural, historical, and cultural capacity of tourism and recreation in the region, as well as other factors favorable to their development, which together ensure the high competitiveness of the tourism and recreation sector in the region. However, it has been severely tested in recent years by the COVID-19 pandemic and Russia's military aggression in Ukraine. This raises the need for a scientific study of the competitiveness of the region's tourism and recreation sector and its response to the key security challenges of the current period.

**Analysis of recent research.** The issue of competitiveness of the tourism and recreation sector (TRS) of Ukrainian regions and, in particular, the Carpathian region, and the impact of such factors as the pandemic, hostilities, and martial law on the territory of Ukraine are not sufficiently covered in scientific publications. To a greater extent, the issues of assessing the competitiveness of the TRS have been scientifically substantiated in the global aspect in relation to the countries of the world. In particular, the World Economic Forum has developed and applies a methodology for determining the countries' Travel & Tourism Competitiveness Index (TTCI). It is calculated every two years on the basis of data from publicly available sources and information from international organizations and experts in the field of travel and tourism.

In the most recently published Index, which included Ukraine (2019), our country was ranked 78th out of 140 countries, up ten positions from the 2017 ranking. In the 2021 report, Ukraine was already absent due to the military aggression on its territory by the Russian Federation [4].

It is possible to apply the methodological approaches used to assess the global competitiveness of travel and tourism in terms of evaluating the competitiveness of regional TRSs. However, selecting appropriate indicators that reflect the

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**Competitiveness of the tourism and recreation sector in the Carpathian region of Ukraine: the impact of the COVID-19 pandemic and martial law**

internal characteristics of the country and the specifics of the regional level in the organization of management and statistics is crucial.

Domestic researchers have made attempts to study the competitiveness of tourism and recreation in the regions. The works of V. Maltsev and H. Kuzminska [5], S. Hrabovenska [6], and O. Royik and M. Kopychynska [7] are worth mentioning. However, no comprehensive methodology has been proposed that would allow assessing the competitiveness of the tourism and recreation sector of the regions of Ukraine and making informed management decisions. It prompted the authors of the article to develop appropriate methodological tools [8]. Meanwhile, crisis phenomena (pandemics, wars) have a significant impact on the competitive position of regions and the development of tourism and recreation. These phenomena are studied in the publications of V. Danylenko-Kulchytska [9], N. Shcherbakova [10], and S. Filyuk [11], etc. However, these issues regarding the Carpathian region of Ukraine deserve a more detailed consideration.

**The paper purpose** is to identify the competitive positions of the tourism and recreation sector of the Carpathian region and reveal how they have changed under

Table 1  
Indices of competitiveness of the tourism and recreation sector in the regions of Ukraine (period up to 2022)

No	Regions	Indices				
		Group A	Group B	Group C	Group D	Integral index
...	AR of Crimea	...	...	...	...	...
1.	Kyiv	5.00 (1)**	6.97 (1)	3.31 (8)	4.93 (2)	5.1
2.	Lvivska oblast***	4.12 (4)	4.63 (4)	5.46 (1)	4.55 (3)	4.7
3.	Odeska oblast	3.83 (13)	4.79 (3)	3.37 (5)	5.38 (1)	4.3
4.	Dnipropetrovska oblast	3.99 (6-7)	4.15 (5-6)	2.64 (14)	4.30 (4)	3.8
5-6.	Zaporizka oblast	3.80 (14)	3.87 (7)	3.01 (12)	4.20 (5)	3.7
5-6.	Harkivska oblast	4.19 (3)	4.86 (2)	2.89 (17)	2.99 (8)	3.7
7.	Kyivska oblast	4.58 (2)	4.15 (5-6)	2.82 (13)	2.90 (9)	3.5
8-9.	Zakarpatska oblast	3.63 (17)	3.49 (9)	4.67 (2)	1.92 (13)	3.4
8-9.	Ivano-Frankivska oblast	3.91 (11)	3.28 (13)	3.82 (3)	2.34 (11)	3.4
10.	Poltavska oblast	4.02 (5)	3.34 (12)	3.03 (11)	2.05 (12)	3.1
11-13.	Vinnytska oblast	3.99 (6-7)	3.14 (16)	3.34 (7)	1.56 (15)	3.0
11-13.	Donetska oblast	3.84 (12)	2.75 (22)	2.12 (22)	3.34 (6)	3.0
11-13.	Chernivetska oblast	3.57 (18)	3.48 (10)	3.62 (4)	1.13 (24)	3.0
14-16.	Volynska oblast	3.97 (8)	2.86 (20)	3.09 (10)	1.55 (16)	2.9
14-16.	Mykolayivska oblast	3.40 (21)	3.20 (15)	1.83 (23)	2.99 (7)	2.9
14-16.	Hersonska oblast	3.28 (24)	2.95 (18)	2.60 (16)	2.76 (11)	2.9
17-19.	Ternopil'ska oblast	3.92 (10)	3.40 (11)	2.45 (19)	1.23 (21)	2.8
17-19.	Hmelnytska oblast	3.94 (9)	2.48 (23)	3.37 (5-6)	1.43 (17)	2.8
17-19.	Cherkaska oblast	3.69 (15)	3.27 (14)	2.55 (18)	1.80 (13)	2.8
20-22.	Rivnenska oblast	3.56 (19)	3.13 (17)	2.61 (15)	1.34 (19)	2.7
20-22.	Sumska oblast	3.44 (20)	3.70 (8)	2.17 (21)	1.31 (20)	2.7
20-22.	Chernihivska oblast	3.37 (22)	2.79 (21)	3.22 (9)	1.36 (18)	2.7
23.	Zhytomyrska oblast	3.65 (16)	2.90 (19)	2.28 (20)	1.25 (21)	2.5
24.	Kirovohradska oblast	3.17 (25)	2.45 (24)	1.70 (25)	1.22 (22)	2.1
25.	Luhanska oblast	3.32 (23)	1.68 (25)	1.75 (24)	1.01 (25)	1.9
...	Sevastopol	...	...	...	...	...

Notes: \* Here and in other tables without the temporarily occupied territories of the AR of Crimea and Donetska and Luhanska oblasts. \*\* In parentheses – the ranking place for the relevant group of indicators. \*\*\* The colored background indicates the oblasts of the Carpathian region.

Source: calculated and compiled by the authors.

the influence of the COVID-19 pandemic and the Russian military aggression in Ukraine.

**Major research findings.** The assessment of the competitiveness of the Carpathian region's TRS conducted as of 2022 demonstrates its high competitive positions in Ukraine. According to the integral competitiveness index, which reflects the average value of partial indices for four groups of assessment indicators (Group A – environmental favorability, Group B – infrastructure development, Group C – natural, historical, and cultural resources, and Group D – the level of development of the tourism and recreation sector), three Carpathian oblasts were among the top ten regions of Ukraine (Lvivska oblast – 2nd place, Zakarpatska and Ivano-Frankivska oblasts – 8-9th places), and Chernivetska oblast was right behind them (Table 1).

The leading competitive positions of the Carpathian region oblasts are primarily determined by the strong indicators of Group B – natural, historical, and cultural resources, which provide high competitiveness indices: Lvivska oblast – 5.46 (1st place among the regions of Ukraine), Zakarpatska oblast – 4.67 (2nd place), Ivano-Frankivska oblast – 3.82 (3rd place), and Chernivetska oblast – 3.62 (4th place). Infrastructure development indicators in the oblasts of the Carpathian region were also relatively high (Table 1, Fig. 1).

Competitiveness was assessed during the period of recovery from the pandemic. It is worth mentioning that the tourism and recreation sector is particularly sensitive to security factors at the global, national, and regional levels, as confirmed, in particular, by the COVID-19 pandemic. The tourism industry has suffered more than other economic sectors from the pandemic because of the strict quarantine restrictions imposed by countries in 2020, which often made it impossible for people to move freely between countries and regions. As a result, in 2020, the loss of overnight stays in European tourist accommodation facilities amounted to more than 51%, decreasing from 2445.1 to 1193.9 million compared to the previous year.

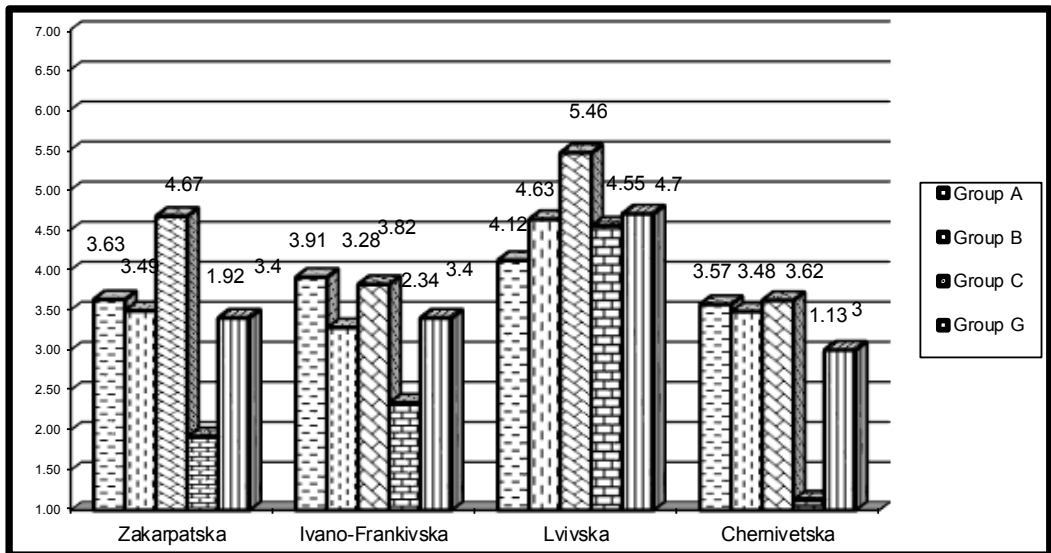


Fig. 1. Indices of competitiveness of the tourism and recreation sector in the oblasts of the Carpathian region of Ukraine by groups of indicators

*Conventional notation: indicators of Group A – favorable environment; Group B – infrastructure development; Group C – natural, historical, and cultural resources; Group D – level of development of the tourism and recreation sector.*

*Source: compiled by the authors.*

The number of overnight stays did not recover in 2022 (2338.8 million) [12]. In Ukraine, the number of actual bed-days spent in collective accommodation facilities decreased from 12446.8 million in 2019 to 6227.4 million in 2020 (by 50.0%) [13, p. 61].

The economic performance of tourism has fallen significantly. According to the State Statistics Service of Ukraine, the cost of vouchers sold by tour operators and travel agencies decreased by 53.0% in 2020 compared to the previous year, from UAH 69.761 million to UAH 32.757 million [14].

The negative effects of the pandemic have also affected the tourism and recreation sector in the Carpathian region of Ukraine. Thus, the number of people staying in collective accommodation facilities in the region decreased by more than half – from 85,169 people in 2019 to 41,129 in 2020. The largest losses of tourists and recreationalists in 2020 were in Chernivetska (77.4%), Lvivska (56.9%), and Zakarpatska (53.8%) oblasts (Table 2). With the exception of Ivano-Frankivska

Table 2

Number of people staying in collective accommodation facilities

Region	2010, persons	2015, persons	2019, persons	2020, persons	2020 to 2019 %
Zakarpatska oblast	101,480	230,000	102,410	47,266	46.2
Ivano-Frankivska oblast	80,680	282,585	166,808	123,876	74.3
Lvivska oblast	353,167	715,333	533,878	229,963	43.1
Chernivetska oblast	50,755	107,236	48,873	11,024	22.6
<i>Total, Carpathian region</i>	<i>586,082</i>	<i>1335,154</i>	<i>851,969</i>	<i>412,129</i>	<i>48.4</i>
Carpathian region to Ukraine, %	14.5	23.1	18.5	18.6	-

*Source: compiled based on [13, p. 52].*

oblast, where the powerful Bukovel ski resort did not cease operations, the oblasts of the region decreased their share in Ukraine in 2020 in terms of the number of people staying in collective accommodation facilities: Lvivska oblast – from 11.59% to 10.37%, Zakarpatska oblast – from 2.22% to 2.13%, and Chernivetska oblast – from 1.06% to 0.50% [13, p. 53].

The number of actual bed-days in collective accommodation facilities in the Carpathian region of Ukraine in 2020 amounted to 1032,283 (47.9% compared to 2019). The figure for 2020 was the highest in Zakarpatska oblast – 71.9%, in Ivano-Frankivska oblast – 68.2%, in Chernivetska oblast – 55.2%, and in Lvivska oblast – only 36.7% [13, p. 61]. Moreover, with regard to foreigners, this figure decreased by more than 5 times in 2020. Meanwhile, the decline in the figure for residents of Ukraine was less than 2 times, which confirms that domestic tourism has replaced the loss of foreign tourists and recreationists during the pandemic.

The infrastructure of the tourism and recreation market in the region has changed. During one year of the pandemic, the number of tour operators in the Carpathian region decreased from 88 to 60 (by 31.8%), and travel agents – from 549 to 436 (by 20.6%) [13, p. 106-107]. The number of collective accommodation facilities (legal entities) also decreased – from 266 in 2019 to 220 in 2020 (by 17.3%) [13, p. 108].

There was also a significant decline in the economic performance of the region's tourism and recreation sector as evidenced by the data in the 2019-2022 Tourism Barometer of Ukraine [13, p. 176-178; 15, p. 126, 216-218]. In particular, the volume of sales of products (goods, services) in the field of activity of hotels and similar temporary accommodation facilities in the region decreased from UAH 2074.3 million to UAH 1200.7 million (by 42.2%). The tourist fee decreased. In Zakarpatska oblast (Uzhorod, Mukachevo, Berehove), it decreased by 46.3%, in Lvivska oblast (Lviv, Truskavets, Morshyn, Slavska Territorial Community) by

49.4%, in Chernivtsi by 52.1%, in Ivano-Frankivsk by 32.7%, and in Vorozhtsa by 38.6%.

Tourism and recreation activities began to revive in 2021. In 2022, international tourism rose close to the pre-pandemic period. According to Eurostat, the number of international tourists in 2022 was only 5% lower than in 2018 [12]. In 2021, the entry flow to Ukraine of people with tourism as their purpose of visit increased 4.3 times compared to the previous year, which is 31.5% less than in 2018. The volume of products (goods, services) sold by hotels and similar temporary accommodation facilities, including vacation and other temporary accommodation facilities, amounted to UAH 19671.5 million in 2021, which is 1.8 times more than in the previous year and 15.1% more than in 2019 [15, p. 112]. In the Carpathian region, the volume of accommodation services provided by hotels in 2021 almost doubled (193.7%) compared to the previous year and exceeded the level achieved in 2019. In particular, in Lvivska oblast, the volume of hotel services in 2021 increased by 221.0%, in Ivano-Frankivska oblast – by 84.5%, and in Zakarpatska oblast – by 11.7% (Table 3).

Table 3  
Volume of products (goods, services) sold by hotels and similar temporary accommodation facilities,  
UAH million

Region	2015	2016	2017	2018	2019	2020	2021
Zakarpatska oblast	71.6	87.3	136.8	166.9	205.5	201.1	224.6
Ivano-Frankivska oblast	78.9	77.1	296.7	327.1	353.3	291.5	537.9
Lvivska oblast	818.3	968.0	1188.0	1348.1	1485.9	700.7	1548.7
Chernivetska oblast	26.1	27.0*	27.9*	28.8*	29.7	7.4	15.5*
Carpathian region	994.9	1159.4	1649.4	1870.9	2074.4	1200.7	2326.7
Ukraine	4501.25	6352.043	7895.318	9479.438	9884.154	5091.009	9601.201

Notes: \* calculation data.

Source: compiled based on [15, p. 126].

Since the beginning of the large-scale invasion of Ukraine by the Russian army on February 24, 2022, the tourism and recreation sectors of the country and the Carpathian region have been further affected. Traditional tourism and recreation flows – especially in the first months of the war – were replaced by flows of internally displaced persons from the frontline eastern and southern regions. Most of them were concentrated in the Carpathian region, including in tourism and recreation facilities. Restrictions on access to statistical data during martial law make it difficult to assess the dynamics and structural changes in the flows of users of their services. A survey was conducted to identify trends in the functioning of tourism and recreation facilities in the region during the war. It shows a drop in the number of guests in all 18 surveyed sanatorium and resort facilities, 19 out of 23 recreation facilities, 66 out of 83 hotels and hotel-type facilities, and 29 out of 35 tourism and recreation facilities in the first half of 2022, despite the fact that all of them accepted internally displaced persons. Their share in the period from February to April in the region's hotel and recreation facilities reached 100%. However, in general, the occupancy rate in the region in the first half of 2022 was about 50% compared to the same period of the previous year [16].

Meanwhile, the region's remoteness from the areas of active hostilities has led to an increase in the performance of the tourism and recreation sector compared to most other regions of Ukraine. In particular, this is demonstrated by the analysis of the dynamics of tax revenues from the tourism industry. The regional indices in terms of tax revenues calculated according to the methodology used to assess the

**Competitiveness of the tourism and recreation sector in the Carpathian region of Ukraine: the impact of the COVID-19 pandemic and martial law**

competitiveness of the regions' TRSs [8] indicate an increase in the competitive position of the oblasts of the Carpathian region in 2023 compared to 2021 (Table 4).

Table 4

Carpathian region oblasts ranked by tax revenues from tourism

Region	Tax revenues from tourism								
	2021, 9 months				Region	2023, 9 months			
	mln UAH	thous. UAH / per 1,000 population	index	ranking		mln UAH	thous. UAH / per 1,000 population *	index	ranking
Kyiv	559.2	188.8	7.00	1	Kyiv	354.1	119.5	7.00	1
Odeska oblast	315.4	133.2	5.19	2	Lvivska oblast↑	248.4	99.4	5.99	2
Ivano-Frankivska oblast	103.9	76.3	3.34	3	Kyivska oblast↑	172.8	96.6	5.85	3
Lvivska oblast	151.0	60.5	2.82	4	Ivano-Frankivska oblast↓	99.1	72.8	4.65	4
Kyivska oblast	88.9	49.7	2.47	5	Zakarpatska oblast↑	62.8	50.2	3.52	5
Zaporizka oblast	76.0	45.6	2.34	6	Odeska oblast↓	76.1	32.1	2.61	6
Hersonska oblast	46.0	45.2	2.32	7	Chernivetska oblast↑	21.4	23.9	2.20	7
Zakarpatska oblast	42.2	33.8	1.95	8	Poltavska oblast↓	30.9	22.5	2.13	8
Mykolayivska oblast	33.4	30.1	1.83	9	Dnipropetrovska oblast↓	69.6	22.2	2.11	9
Harkivska oblast	73.4	27.9	1.76	10	Hmelnytskya oblast↑	22.0	17.7	1.88	10
Poltavska oblast	31.8	23.2	1.61	11	Ternopilska oblast↑	13.6	13.2	1.66	11
Dnipropetrovska oblast	70.7	22.5	1.58	12	Vinnyska oblast↑	19.9	13.0	1.65	12
Chernivetska oblast	12.6	14.1	1.31	13	Rivnenska oblast↑	14.2	12.4	1.62	13
Cherkaska oblast	15.9	13.5	1.29	14-15	Mykolayivska oblast↓	13.3	12.0	1.60	14
Chernihivska oblast	13.2	13.5	1.29	14-15	Kirovohradska oblast↑	10.9	11.8	1.59	15-16
Vinnyska oblast	19.1	12.5	1.26	16	Cherkaska oblast↓	13.9	11.8	1.59	15-16
Kirovohradska oblast	11.1	12.1	1.24	17-18	Volynska oblast↑	11.1	10.8	1.54	17
Hmelnytskya oblast	15.1	12.1	1.24	17-18	Harkivska oblast↓	25.9	9.8	1.49	18
Ternopilska oblast	12.3	11.7	1.23	19	Zhytomyrska oblast↑	9.8	8.2	1.41	19
Donetska oblast	42.4	10.3	1.19	20	Chernihivska oblast↓	7.1	7.3	1.36	20
Rivnenska oblast	11.3	9.8	1.17	21	Zaporizka oblast↓	10.6	6.4	1.32	21-22
Volynska oblast	9.4	9.1	1.14	22	Sumska oblast↑	6.9	6.4	1.32	21-22
Zhytomyrska oblast	9.9	8.3	1.12	23	Donetska oblast↓	5.6	1.4	1.07	23
Sumska oblast	8.1	7.7	1.10	24	Hersonska oblast↓	1.3	1.3	1.06	24
Luhanska oblast	6.7	4.6	1.00	25	Luhanska oblast	0.3	0.1	1.00	25

Notes: ↑↓ – rating growth/decline.

Source: calculated by authors based on [17].

The TRS indices of all oblasts of the region increased in 9 months of 2023 compared to the same period of 2021. Lvivska oblast moved to second place from fourth, Zakarpatska oblast – to fifth from eighth, and Chernivetska oblast – to seventh from thirteenth. Ivano-Frankivska oblast slightly dropped in the ranking of Ukrainian regions in terms of tax revenues from tourism, moving from third to fourth place.

**Conclusions.** The tourism and recreation sector of the Carpathian region of Ukraine is highly competitive at the national level due to the capacity of natural, historical, and cultural resources of the region, as well as the developed tourism and recreation infrastructure. The COVID-19 pandemic has shown the vulnerability of the tourism and recreation sector to social security factors. This resulted in a decline in tourism and recreation activity during the pandemic by almost half at the global, national, and regional levels. Meanwhile, the competitive capacity of the Carpathian

region of Ukraine led to a relatively higher flow of domestic tourism to the region, which partially offset the decline in foreign tourism during the pandemic, as well as a rapid recovery of the region's tourism and recreation sector in 2021. The large-scale military aggression of the Russian Federation interrupted this process and posed new challenges to the region's tourism and recreation sector. As a result, the demand for tourism and recreation services decreased. Temporary accommodation facilities in the region in the first half of 2022 mostly hosted internally displaced persons without focusing on commercial results. The number of operating travel agencies, tour operators, and temporary accommodation facilities has decreased. Meanwhile, the region's remoteness from the areas of active hostilities has led to an increase in the performance of the tourism and recreation sector compared to most other regions of Ukraine. In particular, all oblasts of the Carpathian region showed growth in the first and third quarters of 2023 in terms of the competitiveness index with respect to tax revenues from the tourism industry and were ranked second (Lvivska oblast), fourth (Ivano-Frankivska oblast), fifth (Zakarpatska oblast), and seventh (Chernivetska oblast) among the regions of Ukraine. Thus, one can conclude that the tourism and recreation sector of the Carpathian region of Ukraine has demonstrated its high competitiveness and resilience in crisis conditions and the ability to quickly restore its scope of activities.

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**Кравців В. С., Жук П. В., Кіпчач Ф. Я. Конкуренстоспроможність туристично-рекреаційної сфери Карпатського регіону України: вплив пандемії COVID-19 та воєнного стану.**

*Карпатський регіон України володіє високим потенціалом конкурентоспроможності сфери туризму та рекреації, базою якого є природні та історико-культурні атракції регіону, розвинута інфраструктура. За природно-ресурсними та історико-культурними компонентами конкурентоспроможності туристично-рекреаційна сфера областей регіону отримує найвищі оцінки та рейтингові місця серед регіонів України: Львівська – 1, Закарпатська – 2, Івано-Франківська – 3, Чернівецька – 4. До повномасштабного вторгнення РФ на територію України Карпатський регіон за рівнем розвитку туристично-рекреаційної сфери конкурував з найбільш економічно й демографічно потужними регіонами та привабливими для особливо популярного літнього відпочинку приморськими регіонами України. Пандемія COVID-19 і війна спричинили зміни у функціонуванні туристично-рекреаційної сфери Карпатського регіону. У статті наведено результати оцінювання конкурентоспроможності туристично-рекреаційної сфери Карпатського регіону України на національному рівні. Розглянуто питання щодо наслідків впливу пандемії COVID-19 і російської військової агресії на зміну конкурентних позицій сфери туризму та рекреації Карпатського регіону. Установлено значне зменшення туристично-рекреаційних потоків і зниження внаслідок пандемії та запроваджених у 2020 р. карантинних обмежень кількості туристичних і рекреаційних закладів, які продовжують функціонувати. Водночас у період пандемії проявилися тенденції до заміщення потоку зовнішнього туризму внутрішнім, що сприяло швидкому відновленню протягом наступного року туристично-рекреаційної активності в Карпатському регіоні завдяки високому потенціалу міжрегіональної конкурентоспроможності його туристично-рекреаційної сфери. Процес відновлення перевала російська військова агресія, наслідки якої відобразилися на характері та показниках діяльності туристично-рекреаційних об'єктів регіону. Потік користувачів послуг засобів тимчасового розміщення регіону в першому півріччі 2022 р. зменшився наполовину, причому формувався переважно завдяки вимушено переміщеним особам. Водночас конкурентні позиції туристично-рекреаційної сфери порівняно віддаленого від районів активних бойових дій Карпатського регіону України під час війни зросли, що демонструють показники податкових надходжень від туризму. Результати дослідження засвідчили високу конкурентоспроможність туристично-рекреаційної сфери Карпатського регіону України в повоєнний період і можливості подальшого розгляду цієї сфери серед пріоритетних цілей у стратегіях розвитку його областей.*

*Ключові слова:* туристично-рекреаційна сфера, конкурентоспроможність, Карпатський регіон, туристично-рекреаційна діяльність, COVID-19, воєнний стан.

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Надійшло 12.05.2024 р.