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Recovery of the Tourism Sector of Ukraine from Russian Invasion

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Abstract

The purpose of this research paper is to examine how Russia's invasion of Ukraine has affected the travel and tourism sectors and how Ukraine can benefit from the POCTOS (post-conflict tourism opportunity spectrum) framework after it is applied to the tourism recovery. The invasion, which started on February 24th, 2022, left the country with significant losses, emotional distress, and economic uncertainty. One of the country's sources of revenue, the tourist industry, has been negatively affected. The study aims to respond to two key research questions: whether tourism recovery can serve as a pillar for Ukraine's post-war recovery, and what conditions are necessary for the tourist industry to revive after being exposed to the Russian invasion. The study is based on a thorough examination of the relevant literature as well as secondary information obtained through a survey that 33 stakeholders in the Ukrainian tourist sector filled out. The purpose of this study is to offer insights into how Ukraine might start to restore its tourist business after such a tragic occurrence by looking at these topics.

Keywords: Tourism recovery, War, Russian invasion of Ukraine, post-war recovery.

On February 24th, at 3:40 a.m. (GMT+2), Russia launched its full-scale invasion of Ukraine, which included air, land, and sea attacks. Since that day, Ukraine and its nation have been facing severe conditions, experiencing emotional distress, economic instability, and numerous losses. All industries that brought in revenues for the country were impacted by the current war, including the tourism sector.

Given its size and rate of expansion, the tourism sector is one of the largest in the modern world. By attracting foreign tourists, it can help developing countries gain economic stability. For many nations, the tourism industry is crucial. During economic downturns, it may help citizens find jobs and bring in revenues for tourism-related firms (Tomczewska-Popowycz & Quirini-Popławski, 2021). Throughout the decade, Ukraine's tourism industry was a significant source of revenue for the country. According to the Census and Economic Information Center, in December 2020, Ukraine's tourism industry generated 687 million dollars. Additionally, Ukraine has improved its Travel & Tourism Competitiveness Index (TTCI) score at the quickest rate in the Eurasia subregion since 2017, moving up 10 places to take the 78th position internationally. The number of tourists visiting the country has been expanding, resulting in it becoming more well-liked as a tourist destination. (Ukraine Invest Government Organization [UIGO], 2023).

This research paper will investigate how the war affected Ukraine as a travel destination. The paper will further analyze whether tourism can be seen as a pillar for Ukraine's post-war tourism recovery as well as indicate what prerequisites should be considered to attract tourists to the country. Additionally, the paper will introduce the framework that can be applied to Ukraine's tourism recovery from war.

This research paper poses to answer the following questions:

1. Would tourism be a pillar for Ukraine's recovery at the post-war stage?
2. What are the prerequisites that will help Ukraine recover its tourism industry after the invasion of Russia?

The research paper will be based on a thorough analysis of the current literature on the subject as well as secondary data gathered from a questionnaire distributed to the stakeholders associated with the Ukrainian tourism industry in order to examine and respond to these questions.

Pre-war Tourism in Ukraine

Pre-conflict tourism in Ukraine was a significant and expanding business that provided both domestic and foreign visitors with a multitude of opportunities. Ukraine has a wealth of cultural, historical, and natural resources, and seven of its sites are listed as UNESCO World Heritage Sites, creating substantial prospects for the travel and tourism industries (Ukraine Invest Government Organization [UIGO], 2023). The president of the National Tourism Organization of Ukraine, Ivan Liptuga (2022), stated that there were many diverse types of tourism available in Ukraine, including those focused on the arts, gastronomy, nature, skiing in the Carpathian Mountains, wine tourism, and health & wellness. Adding that the more advanced marketing strategies and tourism infrastructure in regional markets like Turkey made it difficult for Ukrainian tourism to compete on an international level (Harris, 2022). According to the State Statistics Service of Ukraine (2023), the number of international tourists visiting Ukraine climbed at an average yearly growth rate of 13%, increasing from 6.5 million visitors in 2000 to a peak of 25 million visitors in 2008. Following a period of stabilization, the number of tourists visiting Ukraine grew in 2012 as a result of the country hosting the Euro 2012 European Football Championships.

In Ukraine, inbound tourism has been significantly impacted by political unrest and conflict. The event that made the tourist volumes and the economy suffer the most was the annexation of Crimea and the further war in Donbass. An ongoing conflict with neighboring country started from 2014, when Ukraine experienced a revolution and political crisis (Tomczewska-Popowycz & Quirini-Popławski, 2021). Prior to Russia's annexation of Crimea in 2014 and the outbreak of fighting in Donbas, Russian and Belarusian tourists made up the majority of tourists; their numbers have since dropped by 95% (Harris, 2022). In terms of the economy, Ukraine had a reduction in domestic demand in 2014; low foreign demand resulted in a 6.8% decline in real GDP; and a speedy depreciation of the national currency made matters worse. Ukraine's GDP fell by 14.6% in 2015 compared to the first half of the same year as the crisis intensified (Saas, 2020).

During War Tourism

Russian bombers in Ukraine have destroyed thousands of km of roads and hundreds of buildings and utilities. The United Nations Educational, Scientific and Cultural Organization (UNESCO) has confirmed damage to 62 religious institutions, 12 museums, 43 historical or cultural structures, 15 monuments, and almost a dozen libraries since the invasion started on February 24 (Arroyo, 2023).

According to the State Border Service (2023), in January and February of 2022, 825,000 foreigners entered Ukraine. 280,000 individuals over March and April, and 710,000 from May to August. More than 100,000 visitors, primarily from Hungary, Romania, Poland, and Moldova. The majority of foreign travelers who are visiting Ukraine are journalists, diplomats, volunteers, neighborhood activists, and relatives of Ukrainians (Taranenko, 2023).

Tourism and hospitality companies have donated their resources to humanitarian efforts by helping to receive, house, and feed refugees from conflict zones in Ukraine and frequently by supporting their relocation to more tranquil areas of Ukraine or overseas (Harris, 2022). The head of sales at Maestro Hotel Management Group, Tatyana Prodan claims that most of the seaside accommodations, including the once-popular Hotel Nemo in Odessa city, are experiencing poor occupancy rates. Foreign journalists and a few Ukrainian tourists are staying at hotels near Odesa's historic core, where conditions are marginally better (Vlasenko, 2022). The head of the Board of Visit Ukraine, Taranenko Anton (2023) states that among the tourists arriving were Hasidim, members of a special Orthodox Judaism movement. Their nation did not change its traditions and arrived in Uman to celebrate Rosh Hashanah. While just 10 thousand were anticipated, 23 thousand pilgrims arrived in 2022. For instance, 30 thousand pilgrims attended the festival in 2021, whereas just 2,500 did so in 2020.

The Visit Ukraine company launched war tourism tours that are mainly targeted at the press and media travelers. War tourism is the experience of visiting locations associated with tragedy, also known as "dark tourism". War tourism's primary goal is to pique people's interest in the heroic and tragic past (Proshkina, 2016). The tour operator promises to take tourists through the steps of the defenders, show visitors how cities are recuperating from the horrific acts, and let them gaze into the eyes of those whose lives will never be the same again (Wilson, 2022). One of the most popular types of visitor attractions are locations with a connection to the war (Byod et al., 2021).

Post-War Tourism Recovery

The president of Ukraine's Agency for Tourism Development, Mariana Oleskiv (2022), mentioned that as soon as war is over, Ukraine will be ready to welcome international tourists to

revive the tourism industry, which, according to her, will be a pillar of the country's long-term economic recovery (as cited in Ukraine sees tourism as a pillar of post-war recovery, 2023). Understanding the risk of investing in Ukraine today, Oleksiv encourages potential investors to consider the large tourist potential of the nation. According to a recent Investment Monitor study, Oleskiv (2022) is also especially focused on reviving Ukraine's significant medical tourism sector (as cited in Shehadi & Fingar, 2022).

Shannon Stowell, CEO of the Adventure Travel Trade Association, asserts:

“Ukraine’s being on the world stage will increase interest in post-war travel there, and although clearly this tragedy will last for generations, I hope tourism can play a significant part in the country’s recovery.” (as cited in Harris, 2022, para. 40).

Ukrainian researchers Mykhailichenko and Dvorska (2022) mention Croatia as an excellent example of a country that went through a post-conflict tourism recovery. During the Balkan War in the 1990s, Croatian tourism all but ceased. After the war, the nation launched a big PR push to promote undiscovered tourism potential. The first articles on Croatia's beaches appeared in foreign magazines; afterwards, bloggers and social media became involved. Chain hotels, significant cruise lines, and foreign travel operators developed an interest in the nation. The Croatian economy has been significantly impacted by the abrupt rise in tourism activities. Each year, around 10 million visitors bring in significant sums of money and account for 15% of Croatia's GDP. Another country the researchers Mykhailichenko and Dvorska cite as an example of successful post-conflict recovery is Cyprus. Following the interethnic conflict seen between Greek and Turkish communities, Cyprus has emerged as one of the most desirable travel destinations. Cyprus has managed to rank among the most alluring travel destinations in the

Mediterranean thanks to marketing initiatives for the tourist industry and extensive promotion in other nations.

Sri Lanka is another destination that has recovered from war-affected areas through tourism. Promotion of war tourism in the context of stories of conflict, survival, and its aftermath was one of the strategies used in attracting visitors (Dissanayake & Samarathunga).

Based on the data studied from the literature review concerning countries such as Croatia, Cyprus, and Sri Lanka having a similar tragic past and becoming famous tourist destinations in the future, the next part of this research work will focus on the results of a questionnaire filled out by the stakeholders of the Ukrainian tourism sector. The aim of the questionnaire results is to explore and analyze the opinions of Ukraine's tourism stakeholders to restore tourism and bring the country to a new level of recognition as a famous tourist destination.

POCTOS Framework

According to Byod (2021), many nations depend heavily on the tourism industry as a source of income, employment, and opportunity for cross-cultural interaction. However, wars can seriously harm the tourism industry, causing a dramatic drop in visitor numbers as well as harming the infrastructure, economy, and social dimension of the devastated areas. Therefore, if the appropriate circumstances are met, post-conflict tourism might be a chance to revive, reposition, and rebuild the leisure and tourism sectors in the impacted areas.

This study will apply the post-conflict tourism opportunity spectrum (POCTOS) framework to the post-conflict tourism recovery in Ukraine (Byod et al., 2021). A conceptual model called POCTOS divides post-conflict tourism prospects into three stages: pre-conflict, during-conflict, and post-conflict periods. The POCTOS framework's objective is to provide destination

managers in post-conflict areas with a tool to aid in the development of their destinations through tourism. The theoretical framework is based on the idea that tourism may be applied to promote economic growth and assist communities in healing from the destruction of war. The framework considers the socioeconomic, political, and cultural environment of the region impacted by the war, as well as the extent to which tourism has been developed, the severity of the conflict, and how prospective tourists see the region.

If tourism is to rebound post-conflict, a variety of crucial opportunity factors need to be considered, according to the Post-Conflict Tourism Opportunity Spectrum (POCTOS). One of the most essential elements is the security & safety, and accessibility of the destination. Regarding tourist perceptions of the location, a favorable picture of the area is replaced with a negative and hazardous one in the post-conflict era. Key stakeholders must take significant steps to change this so that people once again feel protected. Additionally, the difficulties of market recovery, the need to maintain a favorable destination image, and new forms of tourism that emerge in a post-conflict setting are all significant factors that the authors consider in the development of the POCTOS framework.

There are three basic types of growth in the post-conflict phase. In its first phase, Phoenix development may be seen in the "recovery" it has undergone, which takes the form of novel experiences, products, and attractions that are related to the conflict itself, such as the introduction of dark tourism. In the second phase, Hybrid development introduces "regrowth," which is focused on reconstruction and rebuilding heritage and cultural bases and assets. In the last phase, normalized development — "multi-niched" — is frequently associated with mature destinations that have either been conflict-free or are no longer associated with conflict or dark

tourism. Instead, it has become a mainstream destination that can compete with other destinations in the region or even globally (Byod et al., 2021).

Method

Analysis of secondary data provides a basic overview of Ukraine's tourist history at various phases. As a part of the research's following phase, tourist stakeholders from several provincial cities answered a questionnaire. The findings of a questionnaire determined whether tourism is a pillar for Ukraine's recovery and demonstrated what factors are essential for tourism recovery at the post-war stage.

Participants

A total of 33 stakeholders in the Ukrainian tourism industry participated in the study. Participants in this study were hotel managers, hotel owners and employees of travel agencies who work in Ukraine's tourism industry (Table 1.). The majority of participants were female (n=22, 66.7%), and the age ranged from 18 to 64 years old. Participants in the research were from various regions of Ukraine. The methods of convenience and snow-ball sampling were utilized to reach participants.

Table 1. *Respondents of the questionnaire.*

Hotel Managers	10 participants
Hotel Owners	10 participants
Travel Agency Employees	17 participants

Note. Total N of respondents = 33.

Procedure

A questionnaire was used as the data collection instrument. The questionnaire was created on the Qualtrics platform to gather quantitative data and was made up of Likert-scale and

multiple-choice questions. Descriptive analysis and the correlation approach were the types of analyses performed for the responses. The mean and standard deviation were calculated for each Likert-scale question to support the reliability of the replies. The questionnaire was conducted in three different languages: English, Ukrainian, and Russian, and during the data gathering procedure, information confidentiality and anonymity were ensured. Potential participants were invited to fill out the anonymous questionnaire online through the invitations that were sent through social media platforms. Before completing the questionnaire, participants were informed of the study's confidentiality, objectives, and method.

Data Analysis

The information collected through the questionnaire was analyzed using quantitative research. Descriptive statistics including variance, mean, and standard deviation were used to examine the data. Tables and graphs were then used to illustrate the data for simple understanding.

In order to recover tourism and establish Ukraine as a top travel destination, this research was aimed at understanding the perspectives of key stakeholders in the country's tourism sector. The study used a quantitative research design, and an online questionnaire was used to gather the study's data. The study's findings will be analyzed and presented to provide insights on the role of local tourism stakeholders in Ukrainian post-war tourism recovery.

Results

The largest age group that participated in the study was 25-34 years old (n=10, 30.3%). The participants had a range of experience in the industry, with the majority having 5-10 years of experience (n=15, 45.5%). The occupations of the participants were travel agency employees (n=13, 39.4%), hotel owners (n=10, 30.3%), and hotel managers (n=10, 30.3%). The participants

worked in different regions of Ukraine, with Odessa having the highest number of participants (n=7, 21.2%).

Figure 1. represents whether tourism would be a pillar for Ukraine's recovery at the post-war stage, the question was explored through the 7-point Likert-scale type of question "To what extent do you agree that tourism is a pillar of Ukraine's recovery after the end of the Russian invasion?" The mean response to this question was 5.67, with a standard deviation of 1.17 and a variance of 1.37, indicating a relatively high level of agreement among the participants that tourism could play a significant role in Ukraine's recovery after the war.

The correlation between profession and responses to this question revealed that, in contrast to employees at travel agencies, hotel owners and managers were more likely to answer, "Somewhat agree" or "Agree."

According to the survey's findings, the vast majority of respondents are optimistic about the future of Ukraine's tourist sector. Figure 2. shows that 17 respondents (50%) expect that the sector will fully recover in the coming years, whereas 15 respondents (44%) think that tourism will partially return but may take longer. Only one responder (3%) chose "Other," and they commented that they believed tourism will fully rebound as soon as all the nation's airports reopen. The argument that tourism would never recover was not chosen by any participants.

In terms of the impact of Ukraine's tragic history on the tourism industry, the responses were mixed. The majority of participants (18 participants or 53%) believed that the impact would be significant but eventually the industry would recover. Six participants (18%) believed that the impact would be significant and long-lasting, while five participants (15%) thought that the

impact would be temporary. Two participants (6%) chose "Other" and one of them commented that Ukraine had survived different crises during the latest years (Figure 3).

The results of the questionnaire indicate that there are several prerequisites that could help Ukraine recover its tourism industry after the invasion of Russia. The survey respondents agreed to a great extent that safety and security measures for tourists are crucial for the post-war recovery of Ukraine's tourism industry (mean=6.17, SD=1.17), as well as improved infrastructure, including transportation and accommodations (mean=6.18, SD=1.14). In addition, respondents also agreed that the promotion of Ukraine's unique cultural and historical heritage, such as its UNESCO World Heritage sites, can help to attract more visitors to the country (mean=6.12, SD=1.04).

Figure 4. shows the agreement on war tourism being a good marketing tool to attract tourists to Ukraine, the mean score for this question was 5.61 (SD=1.25), indicating a positive attitude towards it. When it came to the concept of using war tourism as a marketing strategy, more female respondents disagreed with it slightly than male respondents did. Nevertheless, because this correlation was not statistically significant, it cannot be concluded that opinions about war tourism varied significantly between men and women.

Discussion

The tourism sector in Ukraine was significantly impacted by the conflict between Russia and Ukraine that broke out in 2014 and went to a bigger scale in 2022, which resulted in war and the collapse of the tourism industry. This study aimed to identify whether the tourism industry is a pillar for the country's recovery and what the necessary conditions are for Ukraine's tourist sector to recover after being under Russian invasion.

Mariana Oleksiv, the president of Ukraine's Agency for Tourism Development, stated that when the conflict is over, Ukraine will be prepared to receive international tourists to restore the tourism industry, which will be a pillar of the country's restoration (Ukraine sees tourism., 2023).

The study has shown that a vast number of stakeholders agree that tourism can be fundamental for Ukraine's recovery. Most participants, regardless of their line of work, agreed or strongly agreed that tourism can be seen as a pillar for Ukraine's economic revival. Regardless of years of experience and occupation, respondents expect tourism to be restored as soon as the war is over.

The responses to a questionnaire appeared to be favorable regardless of the region when the responses were broken down by location. The questions about safety and security measures for visitors, better infrastructure, and the promotion of cultural and historical heritage received equal mean scores from respondents from all areas of Ukraine. Hence, regardless of location, it can be concluded that these conditions must be met for Ukraine's tourist sector to recover.

Enhanced infrastructure, promotion of Ukraine's distinctive cultural and historical assets, and safety and security measures for tourists are necessary conditions that might aid Ukraine in regaining its tourism business after Russia's invasion. Although it necessitates great thinking and organization, the use of war tourism as a marketing technique may potentially have significance. The opinions regarding these requirements did not seem to be significantly influenced by gender or region.

According to the POCTOS framework, if all the factors, such as safety and security, war tourism, and enhanced infrastructure are taken under development, Ukraine can go through the phoenix development and hybrid development in a fleeting period of time. By focusing on the Phoenix-development scenario, Ukraine has a great potential to start restoring its tourism sector as it has already developed war tourism tours. As such, the Phoenix development focus can aid

Ukraine's move to Hybrid development by encouraging the renovation and rehabilitation of the nation's tourist assets. Requiring on making improvements to the city's facilities and infrastructure while also highlighting newly discovered cultural and historical assets. Additionally, by promoting the successes of the nation's post-conflict rehabilitation, such as the people's resilience and resolution, Ukraine might advance a narrative of optimism and regeneration that would be enticing to travelers. This may contribute to the recovery of the nation's standing as a secure and welcoming travel destination, which would benefit the local economy.

The Russian invasion has significantly harmed Ukraine's tourist sector. However, there is potential for the nation to restore its foundation in the tourism industry through various factors, including the adoption of improved infrastructure, promotion of cultural and historical assets, and safety and security measures for tourists.

The POCTOS framework is a helpful tool that may support the growth of tourism in Ukraine, and its successful implementation may encourage the sector's rapid expansion and renewal. To guarantee a successful future for the nation's tourist sector, it is advised that Ukrainian destination managers understand the framework and put its ideas into practice. Ukraine can get out of this crisis and resume becoming a popular tourism destination for people all over the world with the right strategies in place.

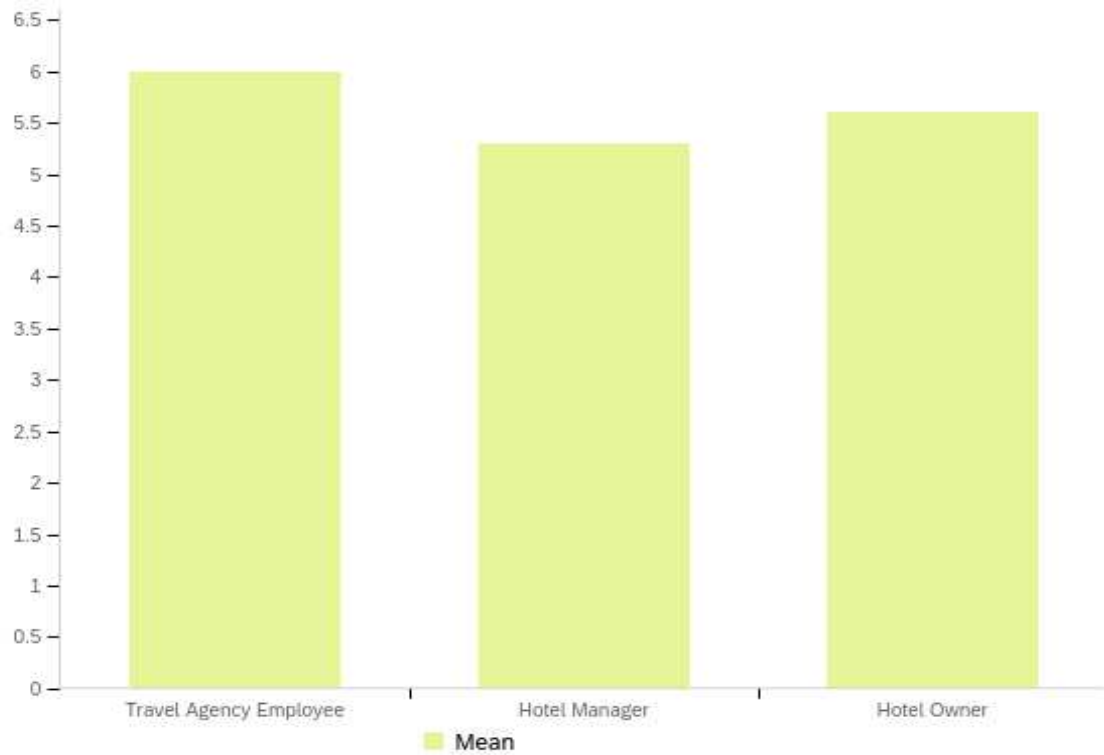
Limitations

One of the main limitations of this study is the small sample size of 33 participants, which was obtained through convenience and snowball sampling techniques. This may limit the generalizability of the findings to the broader population of tourism industry stakeholders in

Ukraine. Additionally, the use of a Likert scale and closed-ended questions may not have allowed for a more in-depth exploration of participants' views and experiences. Another limitation that could negatively impact the result is not enough literature review that could be studied on the topic of war in Ukraine, as the situation is current.

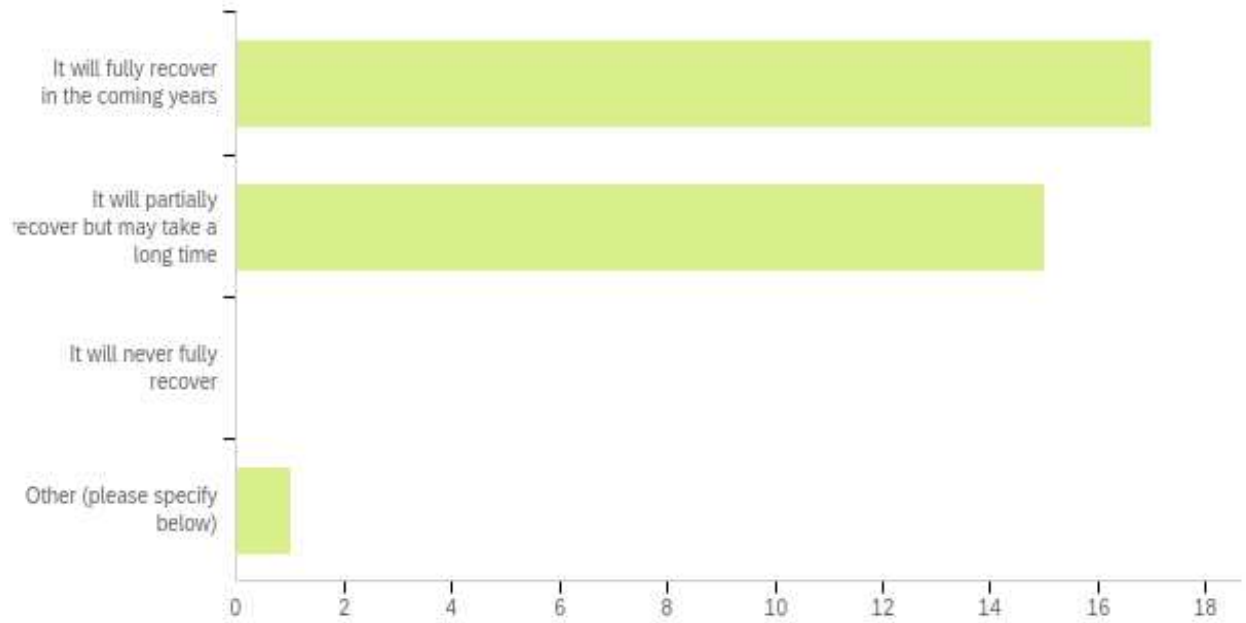
Appendix

Figure 1. *Tourism related stakeholders' level of agreement on the idea of tourism being a pillar for Ukraine's recovery.*



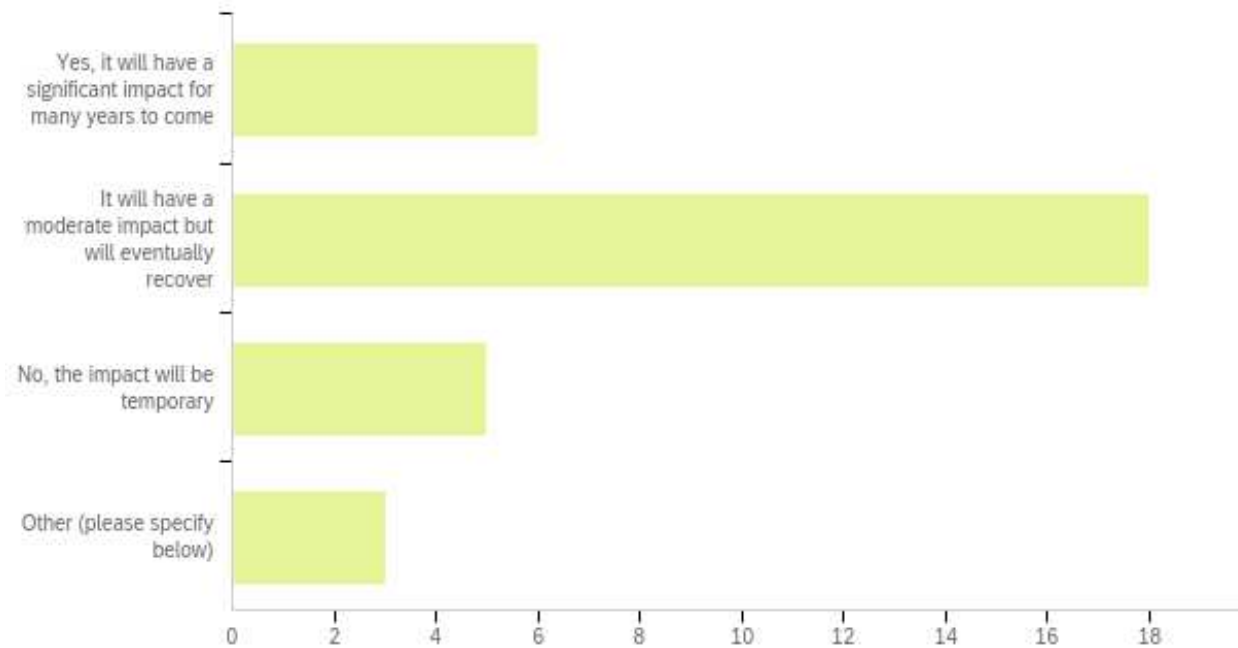
Note. Number of Travel Agency Employees = 13, number of Hotel Managers= 10, number of Hotel Owners = 10. total N = 33.

Figure 2. *Tourism related stakeholders' opinions on the long-term prospects of Ukraine's tourism industry.*



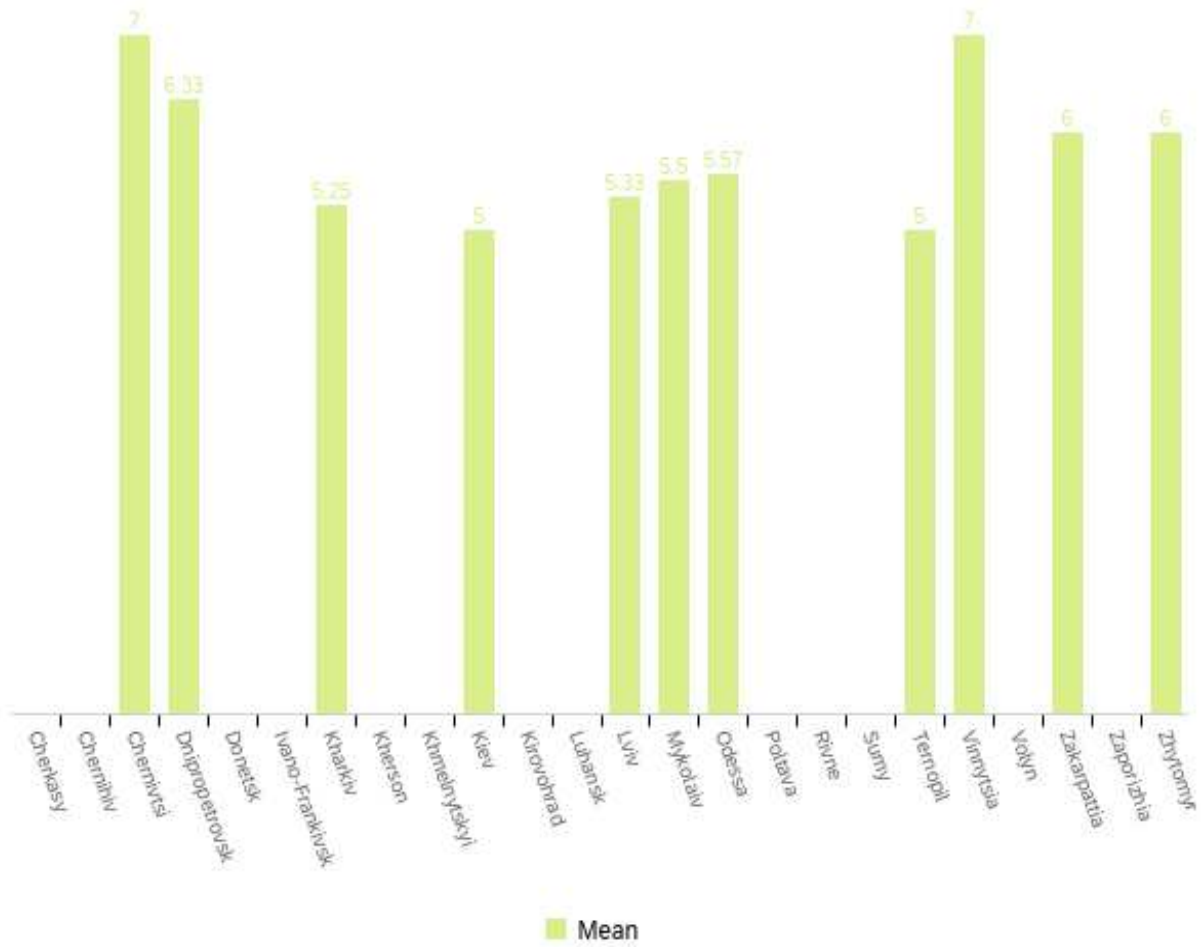
Note. It will fully recover in the coming years = 17, It will partially recover but may take long term= 15, It will never recover = 0, Other = 1.

Figure 3. Tourism related stakeholders' opinions on the impact of Ukraine's tragic history on the tourism industry.



Note. Yes, it will have a significant impact for many years to come = 6, It will have a moderate impact but will eventually recover= 18, No, the impact will be temporary= 5, Other = 3.

Figure 4. Correlation of Tourism related stakeholders' level of agreement on war tourism being a good marketing tool to attract tourists to Ukraine and their region of location.



Note. total N = 33.

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