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## CURRENT PROBLEMS OF LEISURE INDUSTRY DEVELOPMENT IN UKRAINE UNDER MARTIAL LAW



*Problemas actuales del desarrollo de la industria  
del ocio en Ucrania bajo la ley marcial*

*Problemas atuais no desenvolvimento da indústria  
do ócio em Ucrânia sob a lei marcial*

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## ABSTRACT

The purpose of the research work is to find the main crisis processes of the development of the Ukrainian leisure industry in the context of the current geopolitical and economic situation of Ukraine, affected by the introduction of martial law due to the full-scale Russian military aggression in 2022. The authors selected the following theoretical research methods analysis, classification, abstraction and analogy serving the methodological basis of the study to be fully consistent with the requirements and objectives of this scientific article. The results have a goal to find and highlight the main crisis processes in the development of the leisure industry and all areas involved (the industry of aesthetic and intellectual leisure, entertainment industry and recreational leisure). The significance of the received data involves the identification of the main crisis processes in the development of the leisure industry of Ukraine during the war, which can serve as a qualitative basis for finding and implementing effective mechanisms for the restoration of the Ukrainian leisure industry and the Ukrainian economy in the future.

## KEYWORDS

Cultural recreation institutions, crisis processes, directions of development, Ukrainian culture, war.

## RESUMEN

El propósito del trabajo de investigación es encontrar los principales procesos de crisis del desarrollo de la industria del ocio ucraniana en el contexto de la actual situación geopolítica y económica de Ucrania, afectada por la introducción de la ley marcial debido a la agresión militar rusa a gran escala en 2022. Para ello, seleccionamos los siguientes métodos teóricos de investigación: análisis, clasificación, abstracción y analogía, que sirvieron de base metodológica del estudio por ser plenamente coherentes con los requisitos y objetivos de este artículo científico. Los resultados del trabajo científico tienen como objetivo encontrar y destacar los principales procesos de crisis en el desarrollo de la industria del ocio y todas las áreas implicadas (la industria del ocio estético e intelectual, la industria del entretenimiento y el ocio recreativo). La importancia de los datos recibidos implica la identificación de los principales procesos de crisis en el desarrollo de la industria del ocio de Ucrania durante la guerra, que puede servir como base cualitativa para encontrar y aplicar mecanismos eficaces para la restauración de la industria del ocio de Ucrania y la economía ucraniana en el futuro.

## PALABRAS CLAVE

Instituciones recreativas culturales, procesos de crisis, direcciones de desarrollo, cultura ucraniana, guerra.

## RESUMO

O propósito do trabalho de investigação é encontrar os principais processos de crise do desenvolvimento da indústria do ócio ucraniana no contexto da atual situação geopolítica e econômica da Ucrânia, afetada pela introdução da lei marcial devido à agressão militar russa em grande escala em 2022. Para isso, selecionamos os seguintes métodos teóricos de investigação: análise, classificação, abstração e analogia, que serviram de base metodológica do estudo por ser plenamente coerentes com os requisitos e objetivos deste artigo científico. Os resultados do trabalho tem como objetivo encontrar e destacar os principais processos de crise no desenvolvimento da indústria do ócio e todas as áreas implicadas (a indústria do ócio estético e intelectual, a indústria do entretenimento e o ócio recreativo). A importância dos dados recebidos implica a identificação dos principais processos de crise no desenvolvimento da indústria do ócio de Ucrânia durante a guerra, que pode servir como base qualitativa para encontrar e aplicar mecanismos eficazes para a restauração da indústria do ócio de Ucrânia e a economia ucraniana no futuro.

## PALAVRAS-CHAVE

Instituições recreativas culturais, processos de crise, direções de desenvolvimento, cultura ucraniana, guerra.

## Introduction

The leisure industry covers a large number of areas, including various entertainment facilities (fairs, nightclubs), gambling industry (various gambling facilities, including casinos), active recreation facilities (water parks, sports clubs, hippodromes), family recreation facilities, hotel industry (recreation centres, hotels, hostels), cultural institutions (museums, theatres, exhibitions, cinemas), historical and cultural heritage towns, parks of culture and recreation (including resorts, sanatoriums), libraries, etc. The author N. Guseva (2016) notes that the main criteria of success in the modern world are not the financial status of people but their quality and exclusivity of life. The author also emphasizes that the leisure industry is one of the most profitable economic activities in the country. The researchers M. Baranowski and D. Mroczkowska (2021) note that the leisure industry should influence the health and well-being of people, maintaining a balance between work and personal life. As leisure becomes increasingly essential value in terms of quality of life, there is a growing need to combine this phenomenon with the widely developed condition of social well-being.

One of the main links in the leisure industry is the tourism sector, which has suffered a critical impact with the emergence and spread of the global coronavirus infection. The authors Lagodiienko et al. (2022) determine that the Covid-19 pandemic has led to the most global challenges that humanity has faced in recent years. The pandemic has led to economic and health crises as well as side effects on global industries, including tourism. The tourism and leisure industry has been the hardest hit by the effects of Covid-19 and is one of the world's most affected industries. The Chinese scholars Lee and Chen (2021) share a similar view. The scientists agree that tourism is the most vulnerable branch of the leisure industry. Over the years, the tourism industry has faced massive adverse impacts from major crisis events, including the global financial crisis in 1997 and 2008, the severe acute respiratory syndrome (SARS) epidemic in 2003, various social unrest and earthquakes and the Covid-19 epidemic.

In addition to these challenges, Ukraine's leisure industry also faced the war. Due to the Russian aggression that started in the spring of 2014, Ukraine lost temporary access to significant territories that are occupied (partial occupation of Donetsk and Lugansk regions and, in particular, their regional centres or occupation of regional centres of Donetsk and Lugansk regions and adjacent settlements). There is a large number of hotels, sanatoriums, resort towns and tourist centres on the territory of Crimea alone. As of 2022, the development of the leisure industry in Ukraine has stopped. Ukraine is now going through the most difficult period, which significantly affects the development of the country and the functioning of the leisure industry. The full-scale Russian invasion of Ukraine has damaged all sectors of the country. More than 150 thousand people left Ukraine during the first three days of the war, this figure reached more than 13.8 million people at the end of September 2022. Most scholars have studied changes in the leisure industry due to a large number of crises, but almost none of them have explored this issue in the context of war.

The purpose of this research work is to identify the main crisis points in the development of the leisure industry during the war and martial law. The new approach of the research work lies in the coverage of crisis processes in the leisure industry of Ukraine during the war.

## Materials and methods

The methodological aspects of the study assess the regularity and degree of influence of the crises on the development of the leisure industry. The theoretical research tools used in the current scientific work include well-known research methods of analysis that helped to obtain evidence to support the current research and to achieve the required level of reliability and effectiveness. It also serves as the main tool for the formation of new ideas on the subject of the study. The authors formulated the classification, which helped to divide this information for better understanding (for example, the leisure industry is divided into 3 main groups: recreational leisure, aesthetic and intellectual leisure and entertainment industry). The authors used the analogy in studies with insufficient information and limited resources for a more accurate determination of the crisis's impact on individual areas that are part of the leisure industry. The abstraction helped to separate the problems caused by military actions on the territory of Ukraine and compare them with existing studies of crisis moments in the development of the leisure industry that occurred earlier.

An additional tool in the process of conducting the study was the collection and processing of expert opinion and expert assessment on the condition of certain branches of the leisure industry business in the context of their activities during martial law under the influence of current factors. Among industry experts were A. Kaplan, Oscar cinema chain marketing director and A. Stehura, the president of GalExpo Exhibition Company. The materials from scientific and data sources provided information on approaches to the study of the leisure industry, the current state of the Ukrainian and world holiday industry and statistical information that is publicly available. The authors selected organizations operating in the leisure industry of Ukraine to determine the degree of impact of the war and martial law. Among such organizations are cinema chains "Multiplex" and "Oscar" and exhibition organizations: GalExpo Exhibition Company and Lviv Palace of Arts. The authors used information on the state of the leisure industry in South Korea and cited the phenomenon of the musical group BTS as an example of a good level of development of the entertainment industry in the world market.

The researchers used statistical information on the expected rate of development of Ukrainian culture as a basis for determining the level of patriotism among the population of Ukraine and the desired direction of the industry in the future, provided in the survey *Ukrainian Culture on the Brink of Russian Armed Aggression*, conducted by the Ukrainian Cultural Foundation (2022). The general methodological approach of this scientific research emphasizes the determination of the main crisis processes in the field of leisure caused by the war and the introduction of martial law to find effective mechanisms for the restoration and development of the leisure industry.

## Results

There are three main types of leisure industry in the modern world. The first group includes the entertainment industry. This consists of mass art culture, exhibitions, sports, clubs and entertainment venues. The second group includes the industry of aesthetic and intellectual leisure. This group covers culture, collecting, creative societies, scientific and educational institutions, etcetera. The third group of the leisure industry is the recreational activity. This group includes tourism (involving sports), resort recreation, sanatorium activities, etcetera.

(Didenko, 2022). The leisure industry consists of a large number of areas of activity. Each of these areas faced major problems caused by the war and the introduction of martial law. It should be noted that the leisure industry was already in crisis and was just recovering from the challenges of 2020-2021 that accompanied the Covid-19 pandemic long before Russia's full-scale invasion of Ukraine. The restrictions on travel between and within countries and the closure of borders have sharply affected an important part of the leisure industry such as tourism. The introduction of quarantine and isolation has led to a rapid decline in the restaurant business and a reduction in the work of cinemas, theatres, etcetera. (Sinaj et al., 2022). The Covid-19 pandemic has affected the work of many recreational facilities (bars, leisure and sports centres, theatres and cinemas), introducing new rules for their activity regarding the number of visitors, rules for the location of people on the premises and hygiene rules (Kopencova et al., 2022).

On the one hand, leisure should be considered as an integral part of human existence and on the other hand as a social mediator in solving numerous social problems (for example, unemployment). The entertainment industry contains significant market potential. A striking example of this is the following and popularization of Korean culture (cinema, K-pop music). The promotion of culture has a qualitative impact on the economic situation of the country. The group BTS and their song "Dynamite" secured almost eight thousand Korean citizens with jobs during the pandemic and worldwide lockdown. In general, thanks to the worldwide Internet and the availability of digital content, K-pop has become a subculture that has gained popularity around the world among the widest audience (Sinaj et al., 2023).

In Ukraine, the influence of artists is also important for society. Firstly, many Ukrainian artists are defending the country at the frontline, such as Boombox frontman Andriy Khlyvnyuk, who left his band to join the territorial defence forces. Artists such as poet Lyuba Yakymchuk and painter Maria Prymachenko have volunteered to join the territorial defence units, raising morale through their art. Second, artists organise charity concerts to help the military and people affected by the full-scale Russian invasion. For example, Antytila and Go\_A have held charity concerts, raising millions of hryvnias for the army. The international community also supports Ukraine. For example, at the 2022 Grammy Awards in Las Vegas, American singer John Legend performed the song "Free". The musician wrote the song after seeing "footage of the savage, brutal invasion of Ukraine by a regime that has no moral justification". John Legend was joined on stage by Ukrainian singer Mika Newton. And also, a bandura player from Odesa Suzanna Ihlydan (Mope, 2022). Through service at the front, charity concerts and fundraising, Ukraine's artistic community is actively contributing to the country's defence and social welfare in these difficult times. Their efforts demonstrate the power of art to inspire, unite and lift spirits in the darkest hours.

With the beginning of the full-scale war on February 24, 2022, Ukrainian artists began touring Europe and America with charity concerts (Figure 1). In addition to moral support for Ukrainian citizens who had to leave the country, these events helped to raise funds to support the civilian population of Ukraine and the Ukrainian military. They draw the attention of the world community to Ukraine and the war started by Russia, engaging foreigners to be interested in Ukrainian culture. In the future, a highly developed music and film industry can have a positive impact on the economy of Ukraine and even help in the process of economic rebuilding. The increase in patriotic mood in the society and the growing interest in Ukrainian culture in the world can contribute to international investment in Ukraine. According



to the survey Ukrainian Culture on the Brink of Russian Armed Aggression, conducted by the Ukrainian Cultural Foundation, 72% of Ukrainian cultural figures hope for the strengthening of patriotism and 77% of respondents believe that the demand for Ukrainian culture will unconditionally rise. More than 50% of respondents hope to increase funding for Ukrainian culture, including international investments (Ukrainian Cultural Foundation, 2022).

**Figure 1.** How military control of Ukraine has changed  
*Figura 1. Cómo ha cambiado el control militar de Ucrania*



Source/fuente: BBC (2024).

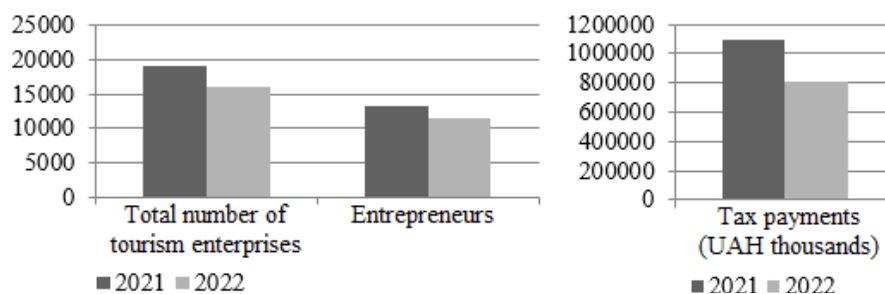
The Ukrainian Cultural Foundation has launched a fundraising campaign aimed at supporting Ukrainian culture and encouraging partners to join this initiative. More than 500 million UAH from the fund intended for the development of culture in Ukraine in 2022 helped to meet the needs of the Armed Forces of Ukraine to fight Russia (Shopina et al., 2022). Some experts identify the need for state support of the cultural sector in the leisure industry. However, they emphasize that the current Ukrainian government refuses to support the cultural sector (Koropatnik et al., 2020). Anyway, it is very difficult to assess the activities of the authorities in supporting the culture of Ukraine under martial law. First, the country is facing the primary goal to defeat the aggressor and end the war.

The entertainment sector is also experiencing a crisis. The film distribution field had to close its branches in the occupied cities and suspend its activities throughout the country in the first days of the war. The Multiplex, the most popular cinema chain in Ukraine, currently operates 17 cinemas in Ukraine (including three franchised cinemas). This figure is 42% less than before the full-scale invasion. A certain number of cinemas were destroyed or damaged (the Mariupol cinema of the Multiplex chain sustained total damage and the Kherson movie theatre was partially destroyed). The Oscar cinema chain resumed its work only 3 months after the start of the full-scale war. The marketing director of the network A. Kaplan emphasizes that the field of cinema distribution is on the verge of existence. Most of the network points temporarily stopped working due to enemy attacks on the territory of Ukraine. Currently, the cinemas are no longer functioning as part of the leisure industry, which used to provide people with quality recreation, but serve as a mechanism to support the country's economy by preserving jobs and paying taxes. Earlier, during the war, some cinema chains supported anti-terrorist operation (ATO) participants by providing them with the opportunity to watch movies at no cost. Economists argue that it is inefficient for businesses to continue their operations and that closing cinemas is much more profitable than trying to keep them open. Therefore, even with closed halls, the owners of cinemas located within shopping centres will suffer losses because they will pay the full cost of rent (Symonenko, 2022).

The situation with the theatres is somewhat easier. The theatres are more mobile institutions and the theatre company can tour all over the country and the world, while cinemas are immobile and almost unable to change locations. The exhibitions and the museums have almost stopped their activities. The total number of visitors has decreased rapidly, foreign visitors have almost disappeared and school excursions have decreased as education has moved to a distance format. Another challenge and one of the strongest impacts on the museum heritage were the robbery of museum exhibits in the Kherson region by Russian invading troops. Currently, almost the entire leisure industry focuses on supporting the country's economy and the spirit of Ukrainians. Most exhibitions have changed the direction of their activities. The president of GalExpo Exhibition Company, A. Stehura, says that almost all exhibitions in Ukraine cancelled their venues during the full-scale invasion. Most of the exhibition halls have become places for humanitarian headquarters and shelters for internally displaced persons from the occupied territories of the country and from the territories where active hostilities are taking place. A. Stehura notes that, for example, the Lviv Palace of Arts underwent conversion into a humanitarian headquarters and the equipment of the Palace contributed to the needs of the Armed Forces of Ukraine and territorial defence.

Another critical aspect in the leisure industry is that a significant number of citizens under the age of 40, the main customers of most leisure facilities, have left Ukraine or are at the front line (Charkina et al., 2022). The audience of cinemas, theatres, museums and other cultural and entertainment institutions of the country has significantly decreased. The tourist sector of the leisure industry is the most affected, however, it does not stop its activities. Referring to the statistical data, the total number of tourism companies decreased by almost 25% compared to the same period last year. The number of entrepreneurs involved in tourism activities decreased by 13.5% and payments for the first half of this year decreased by 25.7%. Comparative statistics are shown in Figure 2.

**Figure 2.** Statistical data on changes in the tourism sector for 2021-2022  
*Figura 2. Datos estadísticos sobre los cambios en el sector turístico para 2021-2022*



Source: own elaboration. Fuente: elaboración propia.

Compared to the first half of 2021, other tourist leisure centres including children’s camps, tourist bases and campsites were able to pay only 73 million UAH to the budget in 2022. This amount is only 41% of the last year’s figure (173 million UAH). The activity of tour operators also decreased significantly, they paid 21% less than in 2021, 83 million UAH against 106 million UAH. The largest tourist influx is present in the western regions of Ukraine, for example Ivano-Frankivsk region paid 63% more taxes in monetary terms than in the previous year and the Lviv region showed an increase of more than 50%. The increase in tourist flows results from the absence of active hostilities in the western part of Ukraine, where life is more peaceful and comfortable. The Ukrainians are increasingly deciding to make short trips to the west of Ukraine to maintain peace and physical and moral rest. The central regions of Ukraine host mostly people who had to leave their cities and flee from war and occupation. It should be noted that the overall picture is very pessimistic despite the increase in tourist flow in some regions of Ukraine. 2022 was one of the most difficult years in the history of the country, caused by many factors such as the destruction of Ukraine’s infrastructure by the aggressor, active hostilities in the east and south of the country and occupation of resort areas (such as Kherson region) and large cities. The implementation of tourism activities is becoming very difficult and impossible in some regions.

It should be noted the crisis in the restaurant sector as well. At the beginning of the military invasion, most of the country’s catering establishments either closed or worked exclusively voluntarily, preparing food for the military at the front (Prokopenko et al., 2023). Kharkiv region is one of the most affected regions of Ukraine (excluding the occupied regions of the country) so only 10% of the total number of catering establishments operate in Kharkiv as of November 2022. The restaurant business feels the safest and most stable in the western regions of Ukraine. However, there are difficulties with the functioning of the facilities in these areas due to missile attacks on the country’s infrastructure. According to experts, the most affected are catering establishments located in shopping centres. They suffered both due to the general decline in the number of visitors and difficulties with the delivery of products and blackouts. The experts think that the rate of decline may reach 80% (Aliyev et al., 2023). People do not want to visit places where there is no electricity and there is a threat to life.

The situation with small catering establishments is somewhat better. According to the analytical centre Restaurants of Ukraine, small coffee shops and cafes with fast food recover and resume their work faster than large restaurant chains. Thus, it can be concluded that



the entire leisure industry and all its areas are experiencing the biggest crisis in the history of Ukraine. The war and martial law, blackouts and massive strikes, the outflow of citizens and the halting of tourism, the occupation of cities and regions as well as the destruction of infrastructure and roads have a great impact on the activities of the leisure industry.

## Discussion

The leisure industry is the area where the intellectual and spiritual needs of different groups of the population are most harmoniously satisfied. The crisis processes in the development of the industry led to cultural decline and economic difficulties in the country. However, it should be noted that most scientists investigate the crisis of the leisure industry in the context of crisis processes not related to the war, mainly describing the impact on the world leisure industry in terms of the global coronavirus infection and all the restrictions caused by its emergence and spread. Almost none of the scientists explored the crisis processes of the industry caused by the war. The insufficiency of the scientific base in the context of the development of the leisure industry during the war is because currently there is no full-scale war in the developed countries of the world. The Russian military aggression against Ukraine is an exceptional precedent and a catastrophe of global proportions, which has an acute negative impact on all global processes. Those of the experts who study the state of development of the leisure industry assess the issue rather locally and one-sidedly, covering only specific areas of activity (tourism, restaurants, etc.) and none of them explores the general state of the industry during the war and martial law.

The scientists Franchuk et al. (2020) identify the crisis in the leisure industry caused by the coronavirus infection. The scholars emphasize that this period has caused the most significant disruption in the global economy since World War II. Unprecedented global travel restrictions and isolation, social distancing, all this has had a major impact on the functioning of the leisure industry around the world. The most vulnerable area of the leisure industry is the tourism sector leading to a rapid decline in the economy of countries. It is impossible to disagree with the opinion of scientists that the decline in economic indicators also took place in Ukraine. A large number of enterprises operating in the leisure industry closed or suspended their activities. However, the government supported the industry by introducing an initiative to encourage citizens to vaccinate in 2021. The initiative has improved the economic performance of enterprises and slightly increased their efficiency. Each citizen who was vaccinated against Covid-19 was given 1.000 UAH, which could be spent on buying tickets to theatres and cinemas as well as on purchasing subscriptions to gyms. Now the state cannot offer even similar support mechanisms facing new crisis processes.

Briz (2021) emphasizes that the development of the industry contributes to the overall development of the country including employment and unemployment rate, quality of services and national income. Unfortunately, it is currently difficult for the majority of the leisure facilities to demonstrate a high level of income, which leads to a decrease in taxes paid by enterprises to the budget as well as to business closures and job cuts. In the current war realities, the leisure industry is moving to volunteering. A large number of Ukrainian cultural figures are volunteering or fighting in the ranks of the Armed Forces of Ukraine when catering establishments are working to produce food for people in need as well as for the frontline and defenders of Ukraine. In general, it should be noted that apart from the immediate humanitarian consequences, the war would significantly delay the recovery of the

global economy, slow growth and increase inflation. Moreover, it is very difficult to make forecasts in the current conditions regarding the further recovery of the country's economy and the leisure industry in particular. Strong national policies and multilateral efforts play an increasingly important role in shaping economic outcomes in this complex and uncertain environment. The researcher Sikimić, (2022) emphasizes the need to revise the state policy aimed at supporting the cultural sector and the leisure industry, stressing that the current policy is not effective and may lead to even greater problems in the future.

Didenko (2022) sees the Ukrainian culture and leisure industry as part of the global entertainment industry. However, Ukrainian culture does not currently have the promotion that it deserves and strives to grow. The researcher notes that consumers satisfy the vast majority of leisure needs in the modern world through the consumption of information and entertainment content, which is also a certain problem on a global scale. Individuals should fulfil their needs not only in a passive mode or remotely via the Internet but also in real-time in leisure facilities. The main crisis aspects of the development of the leisure industry in Ukraine during the war are the general downfall in the country's economy and the critically high level of migration abroad. The authors note active hostilities in the eastern and southern regions and the temporary loss of the occupied territories of Ukraine (including the partial occupation of Donetsk and Lugansk regions and, in particular, their regional centres or occupation of regional centres of Donetsk and Lugansk regions and adjacent settlements). Among the next is the looting of the cultural heritage of Ukraine in the temporarily occupied territories (theft of the full volume of museum heritage that was located in the museums of Kherson) and military attacks on the critical infrastructure of the country. There is a disconnection of communications (water, electricity, fuel) in a large number of regions of the country and the uncertainty of the situation, which makes it impossible to create even approximate and short-term forecasts on the state and mechanisms for restoring the efficiency of all areas of the leisure industry.

## Conclusions

The leisure industry in Ukraine has faced an unprecedented crisis, exacerbated by Russia's full-scale invasion, which has compounded the challenges already posed by the ongoing Covid-19 pandemic. This dual crisis has had profound effects on various sectors, including entertainment, culture, tourism and leisure. The tourism and hospitality industry has been hit hard, with a sharp decline in business due to border closures, infrastructure damage and population displacement. The closure and curtailment of entertainment venues were driven by security concerns, a lack of spectators and limited resources.

Regional differences have emerged in Ukraine, with western regions experiencing more stable conditions and attracting domestic tourists, while central and eastern regions have faced more closures and restrictions due to their proximity to the war zones. Amidst these challenges, some segments of the cultural sector have demonstrated resilience and social responsibility by redirecting their efforts to support Ukraine's defence through charity concerts, art sales and direct aid to the frontline. Thus, as the country seeks to recover and rebuild, it is crucial to prioritise the recovery of this sector as an integral part of the broader socio-economic recovery effort. The depth and severity of the crisis in Ukraine's leisure sector provide a benchmark for assessing and promoting its recovery in the post-war period.

Future research opportunities lie in comparative analyses, long-term effects, policy evaluations, consumer behaviour studies, and investigations into sustainability and innovation within the industry. These avenues will contribute to a more comprehensive understanding of the sector's challenges and opportunities.

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