

ANALYSIS OF THE IMPACT OF COVID-19 AND THE RUSSIAN-UKRAINIAN WAR ON THE DEVELOPMENT OF INTERNATIONAL TOURISM IN GERMANY

АНАЛІЗ ВПЛИВУ COVID-19 ТА РОСІЙСЬКО-УКРАЇНСЬКОЇ ВІЙНИ НА РОЗВИТОК МІЖНАРОДНОГО ТУРИЗМУ В НІМЕЧЧИНІ

Germany is one of the leading tourism countries in the EU, where international tourism contributes significantly to economic development, job creation and infrastructure. Germany is a popular destination for tourists, attracting millions of visitors annually. Major cities such as Berlin, Munich and Frankfurt are significant hubs for cultural and business tourism. This article examines the influence of the COVID-19 pandemic and the Russian-Ukrainian conflict on the German tourism industry between 2000 and 2023. The global pandemic resulted in a precipitous decline in international tourist arrivals due to the imposition of travel restrictions. However, following the lifting of these restrictions, the tourism industry began to demonstrate signs of recovery. The impact of the war also resulted in a reduction in the number of tourists and a shift in the structure of demand, with a greater focus on domestic tourism and neighbouring countries. Concurrently, Germany remains a significant tourist destination for a considerable number of European and international tourists. The article presents recommendations for enhancing the sustainability of the industry, particularly through market diversification, the integration of digital technologies and the development of novel tourism forms. Furthermore, the paper addresses the necessity for the tourism industry to evolve in order to meet the demands of a changing global landscape.

Keywords: international tourism, tourism, tourism industry, Germany, Covid-19, EU, Ukraine, Russian-Ukrainian war.

Німеччина є однією з провідних туристичних країн Європейського Союзу (ЄС). Міжнародний туризм відіграє важливу роль у формуванні економічної стабільності держави, забезпечуючи значний внесок у ВВП, сприяючи створенню робочих місць та стимулюючи розвиток інфраструктури. Туризм у Німеччині щорічно приваблює мільйони відвідувачів, а такі великі міста, як Берлін, Мюнхен і Франкфурт, є ключовими центрами культурного та ділового туризму. Крім того, багата історія Німеччини, пам'ятки світового рівня та яскраві фестивалі продовжують приваблювати іноземних туристів, зміцнюючи її позиції як найкращого напрямку в Європі. Стаття присвячена аналізу впливу двох значущих подій на розвиток міжнародного туризму в Німеччині: пандемії Covid-19 та російсько-української війни. Дослідження охоплює період з 2000 по 2023 роки та ґрунтується на кількісному аналізі таких показників, як кількість міжнародних прибуттів, середня тривалість перебування туристів у країні, а також витрати, що здійснюються іноземними туристами. У статті розглянуто, як суворі карантинні заходи, обмеження на подорожі та зміни в поведінці споживачів під час пандемії призвели до значного скорочення туристичних потоків. Особлива увага приділяється поступовому відновленню галузі після зняття обмежень і впливу на туристичну сферу політичних та безпекових ризиків, викликаних російсько-українською війною. Визначаються основні тенденції в структурі попиту та пропозиції, включаючи зміни у тривалості перебування туристів і їхніх витрат, що спричинили зміщення фокусу на внутрішній туризм та туристів із сусідніх країн. В статті аналізуються економічні наслідки для індустрії туризму Німеччини, зокрема зменшення доходів від міжнародного туризму та зменшення кількості міжнародних туристів в Німеччині, а також зміни у середній тривалості перебування міжнародних туристів в країні. У статті також надано рекомендації для підвищення стійкості галузі до подібних криз у майбутньому, акцентуючи увагу на необхідності диверсифікації туристичних ринків, впровадження цифрових технологій і розвитку нових форм туризму.

Ключові слова: міжнародний туризм, туризм, індустрія туризму, Німеччина, Covid-19, ЄС, Україна, російсько-українська війна.

UDC 338.486.3(430):614.4+327

DOI: <https://doi.org/10.32782/dees.14-31>

Kurychenko Olha¹

Senior Lecturer
at the Department of World Economy
and International Economic Relations,
Odesa I.I. Mechnikov National University

Кириченко О.В.

Одеський національний університет
імені І.І. Мечникова

Statement of the problem. International tourism is an essential component of Germany's economy, contributing significantly to the country's GDP, job creation, and infrastructure development. However, in recent years, the sector has faced unprecedented challenges, notably the Covid-19 pandemic and the geopolitical conflict triggered by the Russian-Ukrainian war. The pandemic led to widespread restrictions on international travel, the imposition of quarantine measures, and a sharp decline in tourist flows. This dealt a severe blow to Germany's tourism industry, particularly to small and medium-sized enterprises, which were forced to adapt to new conditions or cease operations altogether.

An additional destabilizing factor has been the Russian-Ukrainian war, which has impacted Germany's tourism sector through increased economic uncertainty in Europe, rising energy prices, and heightened concerns among tourists regarding safety. Furthermore, the conflict has altered the dynamics of tourist flows, particularly due to a decrease in visitors from Russia and Ukraine – two important markets for Germany. This has led to a reduction in revenue in certain regions that rely on these tourist markets and has triggered changes in the structure of international tourism within the country.

Given the above, there is a pressing need for an in-depth analysis of the impact of both of these

¹ ORCID: <https://orcid.org/0000-0003-3785-9532>

crises on the development of international tourism in Germany, as well as an examination of adaptive strategies that can support the recovery and sustainable growth of the sector amid new global challenges.

Analysis of recent studies and publications.

O. Tabenska explored the effective development of one of the main forms of international economic relations – international trade in goods and services – tourism. Special attention was given to the development of both domestic and international tourism, as well as the set of factors contributing to the growth of domestic tourism in Germany, including economic, social, and cultural aspects [1].

P. Kuchynskyi, in his research on tourism in Germany and the analysis of tourist flows, concluded that the contribution of tourism to Germany's economy is significant. Germany is listed among the most well-known countries on the global tourism market [2]. At the current stage, tourism plays an important role in the country's economy, contributing 4.5% to Germany's GDP. Analyzing Germany's successful experience in developing the tourism industry shows that this experience could be applied to address similar development challenges in Ukraine.

A. Meister et al. examined the dynamics of international tourism development in Germany, noting that Germany has a well-developed tourist infrastructure. Tourism is an important sector of Germany's economy. The total contribution of the tourism industry to the country's GDP in 2021 was 6.4%, while in 2019 this figure was 9.8% [3]. S. Fokin et al. explored event tourism and concluded that it has not only cultural but also socio-economic significance for the development of tourism in Germany [4].

Many foreign researchers have conducted studies on the development of international tourism in Germany and its individual regions. For example, Bauder focused on the potential of urban tourism in Germany and its internal differences. The issue of interaction between tourists and locals, as well as the development of tourism in German communities, became the subject of research by Schmücker and Reif. Additionally, Mose et al. focused on the interrelationship between regional development and tourism, as well as their impact on the sustainable development of regions in Germany [5-7].

The purpose of this article is to examine how the Covid-19 pandemic and the Russian-Ukrainian war have influenced the international tourism industry in Germany, with a focus on identifying key challenges and opportunities that have shaped the sector's recovery and adaptation strategies.

Presentation of the main research material.

International tourist flows play a key role in the economic development of many countries, including Germany, which consistently ranks among the leading

tourist destinations in the EU. The tourism industry in Germany not only makes a significant contribution to the country's gross domestic product but also serves as an important source of job creation, foreign investment attraction, infrastructure development, and revenue generation for the state through tax contributions.

In particular, the development of tourist infrastructure stimulates the active growth of regions, creating new opportunities for local businesses and supporting the sectoral development of other industries such as transportation, hospitality, gastronomy, and culture. In the face of global challenges, such as the Covid-19 pandemic, which led to a significant reduction in tourist flows, and geopolitical instability due to the war in Ukraine and other conflicts, the tourism industry has demonstrated both vulnerability and the ability to rapidly adapt. Germany is gradually regaining its position in the global tourism market [8]. This article analyzes the dynamics of international tourist flows to Germany in recent years, tourist spendings in Germany and average length of stay in Germany, it highlights their impact on the national economy, and outlines the new trends shaping the development of the tourism industry in the context of contemporary challenges.

Analyzing the dynamics of international tourist flows to Germany from 2000 to 2023, several key trends and changes can be highlighted.

From 2000 to 2019, the number of international tourists to Germany steadily increased. In 2000, the country was visited by 18.983 million tourists, and in 2019, by 39.563 million. This represents more than a two-fold increase over this period. The main reasons for this growth include: enhanced marketing efforts to promote Germany as a tourist destination, improvements in tourism infrastructure, high-quality services in the hotel industry and entertainment sector, hosting of major international events such as the 2006 FIFA World Cup and others.

The most rapid growth was observed from 2009 to 2019, when the number of tourists increased from 24.220 million to 39.563 million. This can be partially attributed to the economic recovery after the 2008 global financial crisis and the growing popularity of Germany among tourists from both EU countries and beyond.

The Covid-19 pandemic became the biggest challenge for the global tourism industry, and Germany was no exception. In 2020, the number of tourists sharply declined to 12.449 million, a 68.5% decrease compared to 2019. In 2021, the situation worsened further, with the number of tourists dropping to 11.688 million.

This decline can be explained by the implementation of strict quarantine measures, restrictions on international travel, closure of hotels, museums, restaurants, and other tourist attractions,

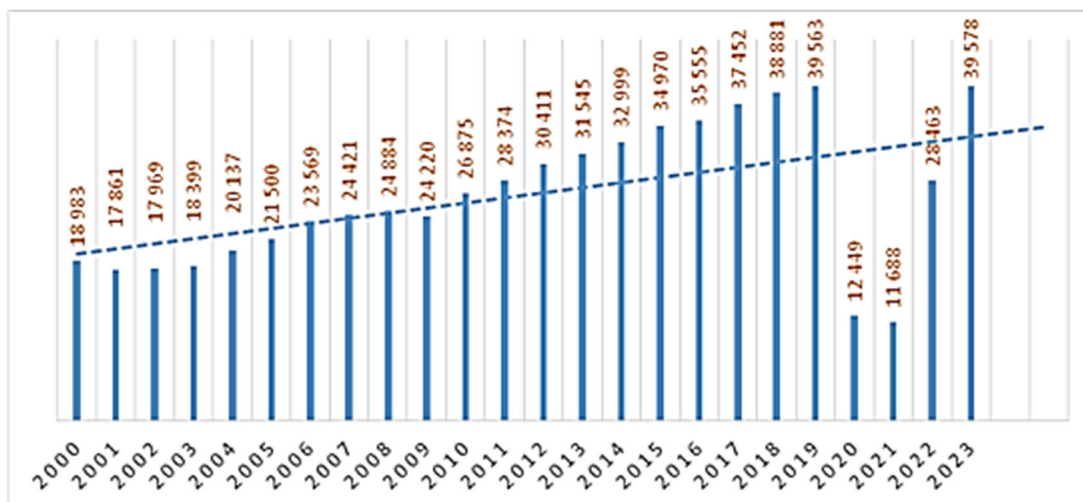


Figure 1. Number of International Tourists in Germany from 2000 to 2023 (thousands)

Source: compiled by the author based on [9]

a general decrease in mobility, and fear of travel due to the threat of illness.

In 2022, Germany began to recover its tourism industry. The number of tourists increased to 28.463 million, which marked a significant improvement after the crisis years of 2020–2021. However, even this level was significantly lower than pre-Covid figures.

In 2023, the number of tourists reached pre-crisis levels again – 39.578 million, exceeding the 2019 figures. This indicates the strong adaptability of Germany's tourism industry and the effectiveness of recovery measures. The main factors contributing to the recovery of international tourism include:

1. The lifting of quarantine restrictions. It is worth noting that, due to the onset of the Russian-Ukrainian war and the influx of refugees from Ukraine to Europe, all quarantine restrictions were lifted almost immediately.

2. The growing interest in cultural and ecological tourism.

3. Active use of digital technologies to attract new tourists and make booking existing trips more comfortable.

The long-term growth of tourist flows to Germany indicates the country's attractiveness as a tourist destination. Covid-19 posed a serious challenge to the international tourism sector, but thanks to successful recovery measures, the number of tourists returned to pre-crisis levels.

The stable recovery in 2023 points to further growth potential, especially in the context of new tourism trends and technologies. The trend line shows long-term growth in tourist flows to Germany, with short-term declines during the 2008 financial crisis and the Covid-19 pandemic. In 2022–2023, Germany demonstrated a rapid recovery in tourism, indicating the sector's high resilience.

Although the overall numbers of tourist flows have increased, the Russian-Ukrainian war may have affected the structure of tourists. For example, the number of tourists from Eastern European countries, particularly Ukraine and Russia, likely decreased. Instead, there may have been an increase in tourist flows from other regions, particularly from the EU or countries less affected by the conflict.

The war led to rising energy prices, inflation, and economic uncertainty in Europe, which could have constrained some tourist flows from countries facing economic difficulties [10]. However, considering the increase in the overall number of tourists in 2023, the impact on tourist flows to Germany turned out to be less significant.

There is no direct and strong negative impact of the war in Ukraine on international tourism, particularly on the total number of international tourists to Germany, as the tourism sector has been steadily recovering to pre-crisis levels since 2021. However, the Russian-Ukrainian war may have influenced the structure of tourist flows and, to some extent, tourism patterns within Europe.

Next, we will analyze how the average length of stay of tourists in Germany changed between 2000 and 2023.

Analyzing the data on the average length of stay of international tourists in Germany from 2000 to 2023, several trends can be identified, and conclusions can be drawn regarding the overall trend.

From 2000 to 2019, there was a gradual decrease in the average length of stay. In 2000, tourists stayed in Germany for an average of 2.32 days, whereas by 2019, this figure had decreased to 2.10 days. The main factors behind this decline may include:

1. Changes in tourist priorities, particularly the rise of short trips (so-called "city breaks") that became popular among European tourists.

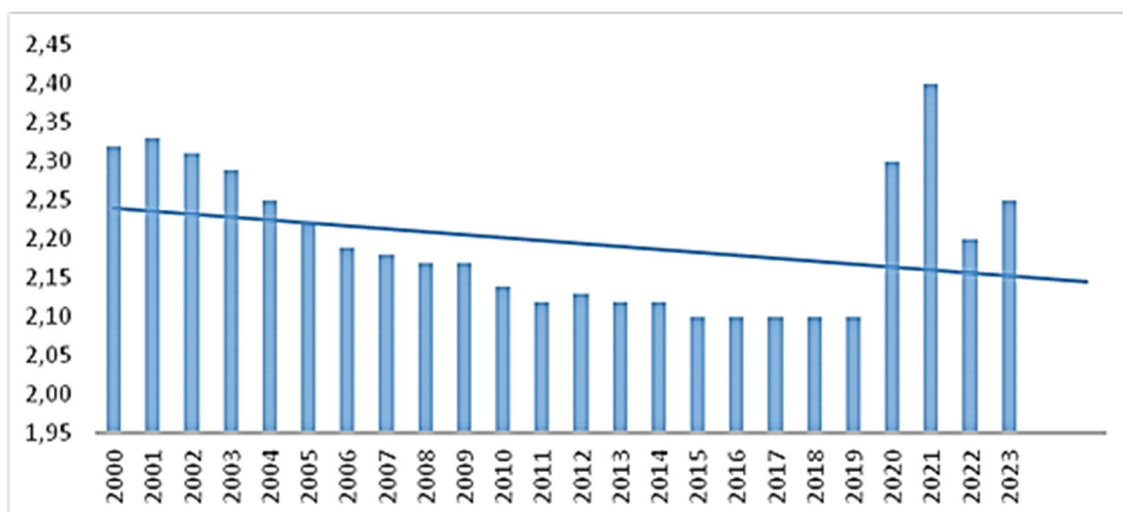


Figure 2. Average Length of Stay of Tourists in Germany from 2000 to 2023 (in days)

Source: compiled by the author based on [9]

2. Increased availability of air travel and the simplification of travel through low-cost carriers, which allowed tourists to take short weekend trips.

3. Competition with other European destinations, influencing tourists to choose shorter trips to different countries.

The average length of stay sharply increased during the Covid-19 pandemic. In 2020, this figure rose to 2.30 days, and in 2021, it increased further to 2.40 days. This increase can be explained by:

1. Limited opportunities for frequent travel, which meant that tourists who were able to travel stayed longer.

2. Unstable air travel conditions, leading tourists to choose longer trips to reduce risks and restrictions.

3. A shift in tourism focus to relaxation and recovery after the stressful period of the pandemic, rather than short business trips.

In 2022, the average length of stay decreased again to 2.20 days, and in 2023, it slightly increased to 2.25 days. This indicates a gradual return to pre-crisis tourism models, although the level has not yet reached pre-pandemic figures. The persistence of some travel restrictions or new trends in international tourism may have caused tourists to stay slightly longer than in 2019.

Looking at the entire period from 2000 to 2023, the overall trend line is downward. There is a gradual reduction in the average length of stay, despite several anomalies related to the pandemic. This suggests that, in the long term, tourists are shortening the duration of their trips to Germany. The main reasons for this could be changing consumer preferences and structural changes in tourism, with shorter trips becoming more popular.

The impact of the Russian-Ukrainian war on the average length of stay of tourists in Germany since

2022 is not clearly visible in the data. However, there are several potential ways in which the war could have indirectly influenced the length of stay:

1. The war led to a large flow of refugees from Ukraine to Germany. However, refugees cannot be considered tourists, so their impact on the average length of stay in tourist statistics is minimal or nonexistent.

2. Due to the war, the flow of tourists from Ukraine and Russia significantly decreased. This could have affected the overall structure of tourists but not necessarily the average length of stay. For example, tourists from other countries who compensated for the reduced flow from Ukraine and Russia may have had similar or slightly different behaviors regarding the length of stay.

3. The war caused economic difficulties in Europe, including rising energy prices and inflation, which may have influenced tourists' decisions regarding the length of their trips. However, based on the presented data, in 2022 and 2023, the length of stay fluctuated within normal levels, and it cannot be clearly stated that the Russian-Ukrainian war significantly changed this indicator.

4. The sharp increase in the length of stay in 2020 and 2021 was primarily related to the Covid-19 pandemic. After that, in 2022, the average length of stay returned to levels closer to pre-crisis levels. Therefore, the impact of the pandemic on the average length of stay was much greater than that of the war.

The war in Ukraine likely did not have a direct significant impact on the average length of stay of tourists in Germany. The main factor determining changes in the length of stay between 2020 and 2023 remained the Covid-19 pandemic and the associated restrictions.

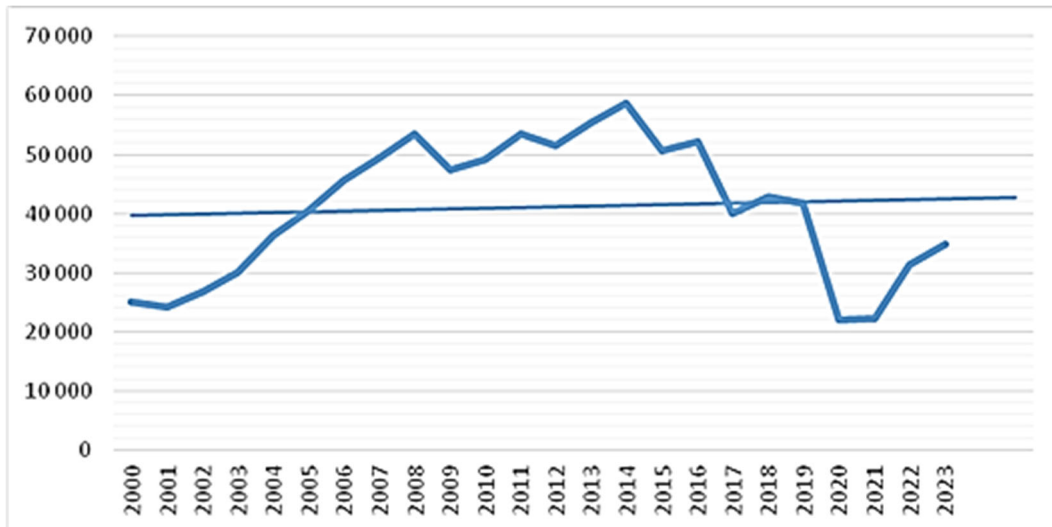


Figure. 3 Expenditure of international tourists within Germany from 2000 to 2023 (million USD)

Source: compiled by the author based on [9]

Next, we will analyze how the spending of international tourists in Germany changed.

Analyzing the expenditures of tourists in Germany in millions of US dollars from 2000 to 2023, several key trends can be identified, leading to conclusions about the overall trend line. From 2000 to 2008, there was a steady increase in tourist expenditures. In 2000, expenditures were 24,943 million USD, and by 2008, they reached 53,402 million USD. In 2009, tourist expenditures dropped to 47,499 million USD, a response to the global financial crisis of 2008. This decline could be attributed to economic instability, reduced purchasing power, and a general decrease in global travel. After 2009, tourist expenditures began to rise again, reaching 58,721 million USD in 2014. This indicates a gradual recovery of the global economy and increased tourism activity in Germany. Expenditures decreased in 2015 to 50,669 million USD and reached a minimum of 40,011 million USD in 2017. Reasons for this may include fluctuations in financial markets and changes in tourist demand. There might have been a shift in the structure of tourist flows or the emergence of competing destinations. In 2018 and 2019, tourist expenditures remained stable at 42,895 million USD and 41,779 million USD, respectively, reflecting the stabilization of the market after previous fluctuations.

During the COVID-19 pandemic in 2020-2021, expenditures sharply dropped to 22,068 million USD in 2020 and 22,137 million USD in 2021. In 2022, tourist expenditures began to recover, reaching 31,257 million USD, and in 2023, they rose to 34,789 million USD. This indicates the gradual recovery of the tourism sector after the pandemic. Considering the overall trend from 2000 to 2023, the trend line shows an upward trajectory leading up to the pandemic, despite short-term declines. From 2020,

there was a sharp drop in expenditures due to the pandemic, but since then, expenditures have started to recover. Based on the data on tourist expenditures in Germany from 2022, there is no clear direct impact of the Russian-Ukrainian war on tourist spending.

The Russian-Ukrainian war likely had an indirect impact on tourist expenditures through economic factors, but the main driver of changes in expenditures was the post-pandemic recovery. The data show a gradual increase in expenditures in 2022-2023, indicating that the war's impact was not decisive for the overall tourism flow and expenditures.

Conclusions. Germany demonstrated steady growth in international tourist flows from 2000 to 2019. This reflects the country's popularity as a major tourist and business hub within the EU and Europe as a whole, as well as the continuous development of international tourism in the country.

Key factors behind this growth include: a stable economy and infrastructure development, the appeal of large cities, cultural heritage, and business travel, ongoing government support for the tourism industry and the growing popularity of Germany as a destination.

The global financial crisis had a short-term impact on tourism in Germany, with the number of tourists decreasing to 24,220 thousand in 2009. However, economic recovery in the following years led to a rapid increase in tourist flows.

The pandemic became the most significant factor leading to a sharp decline in the number of international tourists to Germany, with a more than 70% drop compared to 2019. The average duration of tourists' stays increased during this period (to 2.30 days in 2020 and 2.40 days in 2021), likely due to a limited number of trips and people staying in the country longer.

Since 2022, there has been a rapid recovery in tourism, signaling the high resilience of Germany's tourism industry and its active recovery after pandemic restrictions. Tourist spending grew steadily from 2000 to 2008, with a decline during the financial crisis and the Covid-19 pandemic. In 2020 and 2021, tourist spending was halved, but active recovery began in 2022.

There has been no direct impact of the Russian-Ukrainian war on tourist flows and expenditures in Germany. The recovery post-pandemic was the main driver of changes in 2022–2023. The indirect impact of the war might have affected price increases and some shifts in the geography of tourists, but these factors did not lead to noticeable declines in indicators.

International tourism in Germany has proven resilient to economic crises and pandemics, demonstrating its ability to recover quickly.

REFERENCES:

1. Tabenska O. (2020) Development of tourism in Germany. *Economics. Finances. Law*, no. 2, pp. 28–32. DOI: <https://doi.org/10.37634/efp.2020.2.6>.
2. Kuchynskiy, P. (2015). Turyzm yak faktor rozvytku ekonomiky Nimechchyny [Tourism as a factor in the development of the German economy.]. *Upravlinnia sotsialno-ekonomichnym rozvytkom v umovakh hlobalizatsii* : zbirnyk tez i dopovidei studentiv naukovopraktychnoi konferentsii (Ivano-Frankivsk, March 31, 2015). Ivano-Frankivsk, pp. 272–278.
3. Maister A., Lazhnik V., Puhach S. (2023). Prostori osoblyvosti rozvytku turyzmu v Nimechchyni [Spatial features of tourism development in Germany.]. *Naukovyi visnyk Chernivetskoho universytetu: Heohrafiia*, vol. 842, pp. 66–77. DOI: <https://doi.org/10.31861/geo.2023.842.66-77>
4. Fokin S., Berkova O., Borysiuk O., But M. (2023) Podiievi turizm Nimechchyny: dosvid dlia Ukrainy [Event tourism of Germany: experience for Ukraine]. *Naukovi zapysky Ternopilskoho natsionalnoho pedahohichnoho universytetu imeni Volodymyra Hnatiuka. Serii: heohrafiia*, vol. 54, no. 1. DOI: <https://doi.org/10.25128/2519-4577.23.1.16>
5. Bauder M. (2018). Dynamiken des Städtetourismus in Deutschland. *Standort*, no. 42, pp. 105–110.
6. Schmücker D., Reif Ju. (2023). Geht Tourismus alle an? Teilnahme der deutschen Gemeinden am Übernachtungstourismus. *Zeitschrift für Tourismuswissenschaft*, vol. 15(1), pp. 4–26.
7. Mose I., Hammer T., Siegrist D. (2023) Regionalentwicklung und Tourismus: Von der sektoralen Perspektive zur integrativen Nachhaltigkeitsperspektive. In Kühne, O., Sedelmeier, T., Jenal, C., Freytag, T. (Eds.), *Landschaft und Tourismus. RaumFragen: Stadt – Region – Landschaft. Wiesbaden : Springer VS*, pp. 157–171.
8. Sadova N.V. (2019). Vplyv tsyfrovizatsii na rozvytok turystychnoi industrii [The impact of digitalization

on the development of the tourism industry]. *Efektivna ekonomika*, no. 9. DOI: <https://doi.org/10.32702/2307-2105-2019.9.43>

9. UNWTO Tourism Data Dashboards. Available at: <https://www.unwto.org/tourismdata/unwto-tourism-dashboard>

10. Yakubovskiy S., Kyrychenko O. (2024). Stan i perspektyvy rozvytku industrii turizmu v ukraini v umovakh hlobalnykh vyklykiv [The state and prospects of the development of the tourism industry in ukraine in the conditions of global challenges]. *Ekonomika ta suspilstvo*, no. 67. DOI: <https://doi.org/10.32782/2524-0072/2024-67-55>

БІБЛІОГРАФІЧНИЙ СПИСОК:

1. Tabenska O. Development of tourism in Germany. *Economics. Finances. Law*. 2020. № 2. P. 28–32. DOI: <https://doi.org/10.37634/efp.2020.2.6>.
2. Кучинський П. (2015). Туризм як фактор розвитку економіки Німеччини. Управління соціально-економічним розвитком в умовах глобалізації : збірник тез і доповідей студентів науково-практичної конференції, м. Івано-Франківськ, 31 березня 2015 р. Івано-Франківськ, 2015. С. 272–278.
3. Майстер А., Лажник В., Пугач С. (2023). Просторові особливості розвитку туризму в Німеччині. *Науковий вісник Чернівецького університету: Географія*, 2023. Вип. 842. С. 66–77. DOI: <https://doi.org/10.31861/geo.2023.842.66-77>
4. Фокін С., Беркова О., Борисюк О., Бут М. Подієвий туризм Німеччини: досвід для України. *Наукові записки Тернопільського національного педагогічного університету імені Володимира Гнатюка. Серія: географія*. 2023. Том 54. № 1. DOI: <https://doi.org/10.25128/2519-4577.23.1.16>
5. Bauder M. Dynamiken des Städtetourismus in Deutschland. *Standort*, 2018. № 42. P. 105–110.
6. Schmücker D., Reif Ju. (2023). Geht Tourismus alle an? Teilnahme der deutschen Gemeinden am Übernachtungstourismus. *Zeitschrift für Tourismuswissenschaft*, 2023. Vol. 15(1). P. 4–26.
7. Mose I., Hammer T., Siegrist D. Regionalentwicklung und Tourismus: Von der sektoralen Perspektive zur integrativen Nachhaltigkeitsperspektive. In Kühne, O., Sedelmeier, T., Jenal, C., Freytag, T. (Eds.), *Landschaft und Tourismus. RaumFragen: Stadt – Region – Landschaft. Wiesbaden : Springer VS*. 2023. P. 157–171.
8. Садова Н.В. (2019). Вплив цифровізації на розвиток туристичної індустрії. *Ефективна економіка*. 2019. № 9. DOI: <https://doi.org/10.32702/2307-2105-2019.9.43>
9. UNWTO Tourism Data Dashboards. URL: <https://www.unwto.org/tourismdata/unwto-tourismdashboard>
10. Якубовський С., Кириченко О. (2024). Стан і перспективи розвитку індустрії туризму в Україні в умовах глобальних викликів. *Економіка та суспільство*, 2024. № 67. DOI: <https://doi.org/10.32782/2524-0072/2024-67-55>