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Development tendencies of the sanatorium and resort economy of Ukraine

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Abstract. *The article analyzes the current state of Ukraine's health resort industry under martial law conditions. Key development trends have been identified, including a significant reduction in the number of health resort facilities due to the annexation*



of the Autonomous Republic of Crimea and the impact of active hostilities and missile attacks in the Donetsk, Luhansk, Zaporizhzhia, Sumy, Kharkiv, Kherson, and Mykolaiv regions. These factors severely restrict the use of natural and climatic resources and health resort infrastructure, negatively affecting the industry's development prospects.

The study employs a systemic approach to comprehensively assess the influence of external and internal factors on the functioning of the health resort sector. Methods of statistical analysis, comparative research, and expert evaluation were used to examine the current challenges.

The research identifies key issues affecting the development of the health resort industry, including reduced state funding due to the unstable military-political and economic situation, physical and moral deterioration of most facilities built in the 1980s and 1990s, and insufficient regulatory oversight, which has led to the illegal use of health resort infrastructure and resources.

Possible solutions to these problems have been outlined, including the integration of Ukraine's health resort industry into the international medical tourism market, modernization of resort infrastructure with advanced rehabilitation technologies, the creation of a global information space for promoting Ukrainian health resorts, development of communication technologies aimed at improving interaction with foreign customers, and strengthening regulatory policies in the health resort sector. A crucial factor in improving the situation is raising the standard of living, which will help expand the domestic market for health resort services.

It is concluded that the restoration and development of Ukraine's health resort industry require government support, investment in modernization, adaptation to European medical tourism standards, and active engagement with international partners. The implementation of comprehensive reforms will enhance the competitiveness of Ukraine's health resort sector in the global market.

Keywords: *health infrastructure, modernization of resort facilities, medical tourism, economic stability, regulatory policy.*



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***Анотація.** У статті проведено аналіз сучасного стану санаторно-курортного господарства України в умовах воєнного стану. Виявлено основні тенденції розвитку галузі, зокрема значне скорочення кількості санаторно-курортних закладів унаслідок анексії Автономної Республіки Крим, а також активних бойових дій та ракетних атак на територіях Донецької, Луганської, Запорізької, Сумської, Харківської, Херсонської та Миколаївської областей. Визначено, що ці фактори суттєво обмежують можливості використання*



природно-кліматичних ресурсів і санаторно-курортної інфраструктури, що негативно впливає на перспективи розвитку галузі.

Методологічною основою дослідження є системний підхід, що дозволяє комплексно оцінити вплив зовнішніх і внутрішніх чинників на функціонування санаторно-курортного господарства. Використано методи статистичного аналізу, порівняльного дослідження та експертного оцінювання.

У результаті дослідження окреслено ключові проблеми розвитку санаторно-курортного господарства, серед яких: зниження державного фінансування через нестабільну військово-політичну та економічну ситуацію, моральне та фізичне зношення більшості санаторіїв, збудованих у 1980–1990-х роках, недостатнє нормативно-правове регулювання діяльності санаторно-курортних закладів, що спричиняє незаконне використання їхньої матеріально-технічної бази.

Окреслено шляхи вирішення зазначених проблем, серед яких: інтеграція санаторно-курортного господарства України у міжнародний ринок медичного туризму, модернізація інфраструктури закладів з урахуванням сучасних технологій реабілітації, створення глобального інформаційного простору для популяризації українських санаторіїв, розвиток комунікаційних технологій, спрямованих на покращення взаємодії з іноземними споживачами послуг, а також посилення регуляторної політики у сфері санаторно-курортної діяльності. Важливим фактором покращення ситуації є підвищення рівня життя населення, що дозволить розширити внутрішній ринок санаторно-курортних послуг.

Зроблено висновок, що відновлення та розвиток санаторно-курортного господарства України потребують державної підтримки, інвестицій у модернізацію закладів, адаптації до європейських стандартів медичного туризму та активного залучення міжнародних партнерів. Упровадження комплексних реформ сприятиме підвищенню конкурентоспроможності українського санаторно-курортного сектора на світовому ринку.



Ключові слова: *оздоровча інфраструктура, модернізація санаторно-курортних закладів, медичний туризм, економічна стабільність, регуляторна політика.*

Problem Statement and Its Connection with Important Scientific and Practical Tasks. The health resort industry in Ukraine plays a crucial role in the socio-economic development of regions, as its condition is closely linked to military-political and economic processes at local, regional, and national levels. The creation of a socially oriented recreational space requires further development of state policies in the field of sanatorium and resort management to enhance public access to high-quality therapeutic, health-improving, and preventive services. These services are integrated into the healthcare and leisure system under the national health protection program, considering the impact of demographic decline in the country.

Despite its potential, the industry faces numerous challenges, including reduced state funding, outdated infrastructure, and regulatory gaps that hinder its effective functioning. The impact of war has further exacerbated these challenges, with many facilities located in conflict zones becoming inaccessible or non-operational. Understanding the dynamics of the health resort industry and its adaptation to modern realities is essential for developing strategic solutions aimed at ensuring its resilience and growth.

Analysis of Research and Publications. Numerous studies have been conducted on the development of the health resort industry, highlighting its significance for national and regional economies. Among the fundamental works in this field are those by Boyko Z. et al. [1], Borulko N. [2], Vlashchenko N. [3], Volkova I. [4], Halasiuk S. [5], Halkiv L. [6], Herasymenko T. [7], Kovalenko N. [8], Lozova O. [9], and others.

Recent research focuses on various aspects of sanatorium and resort development, including modernization strategies, economic impact, and integration into international wellness tourism markets. For example, Boyko Z. et al. [1] analyze medical and health tourism trends in leading Western European resort regions, providing valuable insights



for Ukraine's sector. Borulko N. [2] examines the current state and future prospects of the country's sanatorium and resort complexes, emphasizing the need for increased investment. Similarly, Kovalenko N. [8] explores forecasting models for the development of sanatorium and resort activities, stressing the importance of long-term planning.

Studies by Herasymenko T. et al. [7] and Pomaza-Ponomarenko A. [10] focus on the strategic priorities for the recovery of Ukraine's resort industry in the post-war period. They highlight the role of state policies in revitalizing the sector and attracting international medical tourists. Additionally, statistical data from the State Statistics Service of Ukraine [11] provide a quantitative assessment of the industry's contraction over recent years.

Despite these valuable contributions, gaps remain in understanding how to effectively manage and modernize the sector amid crisis conditions. Many studies analyze general development trends but lack specific recommendations on adapting the industry to wartime and post-war realities. Additionally, insufficient attention has been paid to the potential of integrating Ukraine's health resorts into the global medical tourism market.

Identification of Previously Unresolved Aspects of the General Problem.

Several critical aspects of the health resort industry's development remain unresolved in existing research:

Adaptation to Crisis Conditions – There is limited research on strategies for maintaining the functionality of sanatorium and resort facilities during wartime, including the impact of military conflicts on their operations and sustainability.

Regulatory and Policy Frameworks – Previous studies acknowledge regulatory weaknesses but do not offer concrete mechanisms for improving state oversight and policy formulation. Addressing these gaps is crucial for ensuring the legal protection and strategic management of the sector.

Infrastructure Modernization – While many studies emphasize the outdated nature of sanatorium facilities, there is insufficient discussion on financing models for



modernization, including potential public-private partnerships and international investments.

Integration into International Markets – The potential of Ukraine’s sanatorium and resort industry to enter the global medical tourism sector has not been fully explored. Developing a roadmap for international cooperation and branding strategies is essential.

Digital Transformation – The role of digital technologies in promoting health resort services, optimizing operations, and enhancing customer experience requires further investigation.

Addressing these aspects will contribute to the formation of a sustainable and competitive health resort industry in Ukraine, capable of withstanding external shocks and adapting to evolving market conditions.

Formulation of the Article’s Objectives (Research Tasks). The primary objective of this study is to analyze the current trends in the development of Ukraine’s health resort industry and propose strategic solutions for its modernization and integration into global medical tourism markets.

To achieve this goal, the following research tasks are outlined:

Assess the current state of Ukraine’s health resort industry, identifying key trends, challenges, and opportunities for development.

Examine the impact of the war on the sector, including the decline in operational facilities and the loss of key resort areas.

Analyze international best practices in sanatorium and wellness tourism, drawing insights from successful models in Western Europe and beyond.

Identify effective regulatory and policy mechanisms to support the sustainable growth of the industry and enhance state oversight.

Propose strategies for infrastructure modernization, including investment opportunities, public-private partnerships, and funding models.



Develop recommendations for integrating Ukraine's health resorts into the international medical tourism market, including branding, digital marketing, and international cooperation.

This study aims to bridge existing research gaps by providing practical and policy-oriented solutions for revitalizing the health resort sector in Ukraine. Its findings will be valuable for policymakers, industry stakeholders, and international partners interested in supporting the country's recovery and economic development..

The results. In the contemporary Ukrainian context, characterized by Russian aggression against Ukraine, the post-pandemic recovery period following COVID-19, and an economic crisis, highly effective treatment and rehabilitation at Ukrainian resorts present a viable alternative to outbound health and medical tourism. As a result, the demand for national resorts and recreational services located in relatively remote areas from active combat zones is increasing. Modern lifestyles are characterized by an accelerated pace, increased informational overload, and persistent psychological stress. These complicating factors generate a heightened need for health-oriented leisure during vacation. The key trends shaping the health resort sector include: the main motivation is fatigue relief, advancements in digital transformation and online service integration, and a growing demand among young people for both recreation and treatment. Due to wartime conditions, the State Statistics Service does not publish official data on the state of the health resort industry. This can be attributed to sanatorium and resort facilities located in temporarily occupied territories, those affected by Russian military aggression against Ukraine, and those that are currently unfit for operation and require reconstruction. Therefore, for the analysis of the state of the health resort industry, the period from 2018 to 2020 has been selected (table 1).

The trend of decline in all types of sanatorium and resort facilities is evident due to the annexation of the Autonomous Republic of Crimea, where numerous sanatorium and resort facilities operated, and companies sent their employees for health improvement and treatment under union-funded health trips. A similar situation has



developed in the Donetsk, Luhansk, Zaporizhzhia, Sumy, Kharkiv, Kherson, and Mykolaiv regions of Ukraine, which have suffered from missile attacks by Russia and are border areas, preventing citizens from safely utilizing the full therapeutic and health-improving potential of these territories.

Table 1

Sanatorium and Resort Facilities in Ukraine for the Period 2018–2020

Type of facilities	2018	2019	2020	Change	
				+/-	%
Sanatoriums	295	279	272	- 23	- 7,7
Children's Sanatoriums	111	107	103	-8	- 7,2
Preventive Health Resorts	79	63	55	- 24	- 30,3
Medical Boarding Houses	14	12	12	-2	- 14,2
Recreational Homes and Pensions	76	73	67	-9	- 11,8
Recreation Bases and Other Facilities	1388	1285	1229	- 159	- 11,4
Facilities for 1-2 Day Stays	11	10	6	-5	- 45,4

Source: [11]

All healthcare institutions in Ukraine can be classified into three groups:

1. Budgetary health resorts, which have specialized medical departments and offer a limited range of additional services. These institutions are non-commercial, and budgetary funding is primarily allocated for children, low-income individuals,



pensioners, people with specific medical conditions, Chernobyl disaster victims, disabled war veterans, and participants of the Russia-Ukraine war.

2. Medical centers, wellness centers, and resort complexes, which are either subdivisions of or financed by industrial and financial groups. Typically structured as hotel-based institutions with strong diagnostic and therapeutic facilities, these centers are intended for employee rehabilitation within the social insurance system.

3. Privately owned health resorts, which primarily offer accommodation based on hotel-type models and include commercial medical centers specializing in medical, diagnostic, and additional services. These facilities cater to short-term stays (3–5 days), thereby mitigating sharp fluctuations in seasonal demand. They often function as resort and wellness centers in large hotels and tourism complexes.

In 2022, a study was conducted to classify six regions of Ukraine based on the level of development of the health resort industry [10]. The first group includes the most developed regions of the country, while the sixth comprises the least developed ones, reflecting a direct correlation between the availability of natural therapeutic resources, their quantity, and the existing sanatorium and resort infrastructure (table 2).

Table 2

**Classification of Ukrainian Regions by the Level of Development of
Sanatorium and Resort Services**

Group	Regions
1.	Lviv, Odesa
2.	Kyiv (city)
3.	Vinnytsia, Zakarpattia, Poltava
4.	Zaporizhzhia, Ivano-Frankivsk, Kyiv, Kharkiv
5.	Volyn, Donetsk, Mykolaiv, Rivne, Sumy, Khmelnytskyi, Chernivtsi
6.	Dnipropetrovsk, Zhytomyr, Kirovohrad, Luhansk, Ternopil, Kherson, Cherkasy, Chernihiv

Source: [10]



Thus, as of early 2022, the leading regions for sanatorium and resort treatment, wellness, and rehabilitation were the resort areas of Odesa and Lviv regions. Kyiv ranked second, while Vinnytsia, Zakarpattia, and Poltava regions occupied the third position.

The Dnipropetrovsk region, along with Zhytomyr, Kirovohrad, Luhansk, Ternopil, Kherson, Cherkasy, and Chernihiv regions, ranked last in the classification, placing them in the sixth group.

Due to the war with Russia, Ukraine has lost 90% of its revenue from the sanatorium and resort sector. This impact has been particularly severe in the southern and coastal areas, where the presence of the enemy fleet in the sea and the risk of artillery shelling creates significant threats.

Meanwhile, the situation in the tourist regions of the Carpathians is improving. Being far from combat zones, tourism development in the Carpathians has accelerated since early 2023. As of early 2024, the situation remains stable, and most establishments are operating normally.

During the war, many sanatoriums in the Carpathian region provided shelter to over 100,000 internally displaced Ukrainians, offering accommodation, food, essential medical treatment, and rehabilitation services. This led to increased activity in regional enterprises and the private sector, as well as a rise in rental prices. Additionally, special therapeutic and preventive programs have been developed for Ukrainian military personnel injured in combat.

The development of the health resort industry is closely linked to addressing social, economic, political, and military challenges that arise during Ukraine's socio-economic transformation. A rational approach is necessary to establish a highly developed national healthcare and wellness industry and integrate it into the global tourism and recreation sector, ensuring the sustainable use of natural resources, historical landmarks, and architectural heritage.



The health resort industry is an important sector of Ukraine's economy with high development potential. However, its active functioning is hindered by numerous problems:

- 1) reduction of state funding for sanatorium and resort facilities due to the unstable military-political and economic situation in the country;
- 2) most sanatorium and resort facilities in Ukraine were built in the 1980s-1990s and require modernization;
- 3) illegal use of the material and technical base of sanatorium and resort facilities, resulting from the lack of clear regulatory oversight in the industry;
- 4) weak marketing strategies of Ukrainian sanatorium and resort facilities lead to a lack of promotion among Ukrainian citizens and foreign guests, limiting the sector's development and the growth of sanatorium and resort products;
- 5) outdated infrastructure in most sanatorium and resort establishments, causing stagnation in the innovative development of the industry.

Key factors that will contribute to improving the functioning of Ukraine's health resort industry include:

- 1) creation of a global information space (Internet) and fundamentally new means of communication;
- 2) integration of Ukraine's sanatorium and resort product into the international medical tourism market;
- 3) promotion of the English language as the language of international communication;
- 4) improvement of living standards and employment;
- 5) investments in the development of the tourism sector and medical systems;
- 6) international accreditation and certification of sanatorium and resort services;
- 7) international accessibility for consumers;
- 8) lower cost or better quality of procedures compared to foreign equivalents;
- 9) strong reputation for providing sanatorium and resort products;
- 10) successful implementation of advanced practices and modern technologies;



11) highly qualified personnel;

12) stability in the country: political, military, economic, and social.

Ukrainian sanatorium and resort facilities have significant potential for economic development, and their active functioning is closely linked to increased tourist flow and demand for services. Possible solutions for addressing the challenges in the sector include:

1. Development of a stable national strategy for the growth of the health resort industry and attracting foreign investments.

2. Elimination of corruption schemes in the use of state funds and expenditure management.

3. Development and implementation of national programs for the improvement of sanatorium and resort infrastructure.

4. Identification and prioritization of key directions for development and funding.

5. Creation of a favorable investment climate for the sector.

6. Establishment of a monitoring and management system for sanatorium and resort facilities.

7. Strengthening legal accountability for violations in the industry.

8. Development and implementation of marketing strategies for Ukrainian resorts and sanatoriums at the international level.

9. Use of social media and other online platforms for advertising and attracting foreign tourists.

10. Modernization of the material and technical base of sanatorium and resort facilities.

11. Restructuring and commissioning of existing accommodation facilities that can be used for health improvement and medical treatment.

It should also be noted that countries experiencing military conflicts, such as Israel, which has been engaged in a long-term conflict with Palestine and has faced similar challenges related to the imposition of martial law, continue to prioritize the health of their population and utilize the potential of the health resort industry.



Conclusions. There is a clear trend of decline in all types of sanatorium and resort facilities in Ukraine. This is primarily due to the annexation of the Autonomous Republic of Crimea, which previously housed a significant number of sanatorium and resort establishments. A similar situation has arisen in Donetsk, Luhansk, Zaporizhzhia, Sumy, Kharkiv, Kherson, and Mykolaiv regions, which have suffered from Russian missile attacks and are border areas, making it unsafe for citizens to fully utilize the region's health and wellness potential.

The current international stance toward Ukraine can be leveraged to stimulate the development of sanatorium and resort tourism. The country has numerous valuable resorts and sanatoriums with significant natural and recreational potential, offering not only leisure services but also medical, wellness, preventive, and rehabilitation treatments.

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