DOI: https://doi.org/10.32782/2524-0072/2026-92-15

UDC 640.4:338.48-6](477)

DIGITAL MATURITY AS A DETERMINANT OF RESILIENCE AND SOCIO-ECONOMIC EFFICIENCY OF HOTEL-AND-RESTAURANT COMPLEXES IN WARTIME UKRAINE

ЦИФРОВА ЗРІЛІСТЬ ЯК ДЕТЕРМІНАНТА СТІЙКОСТІ ТА СОЦІАЛЬНО-ЕКОНОМІЧНОЇ ЕФЕКТИВНОСТІ ФУНКЦІОНУВАННЯ ГОТЕЛЬНО-РЕСТОРАННИХ КОМПЛЕКСІВ В УМОВАХ ВОЄННОГО СТАНУ В УКРАЇНІ

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The article examines digital maturity as a determinant of resilience and socio-economic efficiency of Ukraine's hotel-and-restaurant complex under martial law. Using public statistics for 2022-2026 rather than primary survey data, it shows that hotel revenue and tourist-tax receipts have grown considerably faster than occupancy and taxed hotel-nights, that direct and social-media booking channels have displaced online travel agencies, and that regions with more stable infrastructure show markedly better recovery trajectories than regions closer to active combat. These patterns support extending the author's previously proposed Digital Maturity Index / Socio-Economic Efficiency Index framework with an explicit infrastructure-resilience sub-domain, with direct practical implications for enterprise digitalisation strategy and for hospitality-recovery policy design.

Keywords: digital maturity; digital transformation; hotel-and-restaurant complex; socio-economic efficiency; infrastructure resilience; wartime economy; hospitality industry; Ukraine.

Стаття присвячена визначенню цифрової зрілості як детермінанти стійкості та соціально-економічної ефективності готельно-ресторанного комплексу України в умовах воєнного стану. Актуальність зумовлена тим, що галузь понад чотири роки функціонує під впливом безпекових загроз і пошкодження енергетичної інфраструктури, залишаючись сектором із високим потенціалом повоєнного відновлення, тоді як наявна література рідко поєднує цифрову зрілість з окремим виміром стійкості для воєнного стану. Метою статті є визначення того, як цифрова зрілість, доповнена компонентом інфраструктурної стійкості, пов'язана з операційною та соціально-економічною ефективністю українських готельно-ресторанних комплексів у 2022-2026 роках. Методи дослідження включають систематизацію літератури з цифрової зрілості, управління доходами та формалізації економічної діяльності, документальний і порівняльно-статистичний аналіз вторинних даних Державної служби статистики України, Державного агентства розвитку туризму та галузевої аналітики за регіонами і періодами, а також якісне картування спостережених патернів на домени рамки Індексу цифрової зрілості (DMI) / Індексу соціально-економічної ефективності (SEEI), без збору первинних даних опитувань. Результати показують, що доходи готельно-ресторанного бізнесу та надходження туристичного збору зростали значно швидше, ніж заповнюваність і кількість оподатковуваних ночівель, що прямі та соціальні канали бронювання витіснили онлайн-турагентства, а регіони зі стабільнішою інфраструктурою демонструють помітно кращі траєкторії відновлення; ці патерни узгоджуються з механізмами управління доходами та цифрової формалізації, описаними в літературі, і обґрунтовують розширення рамки DMI/SEEI підіндексом інфраструктурної стійкості. Практичне значення результатів полягає у формуванні статистично обґрунтованої основи для оцінки цифрової зрілості на рівні підприємства та рекомендацій щодо пріоритизації інвестицій у цифрову дистрибуцію, управління доходами, формалізацію розрахунків та інфраструктурну автономність під час війни і в повоєнний період.

Ключові слова: цифрова зрілість, цифрова трансформація, готельно-ресторанний комплекс, соціально-економічна ефективність, інфраструктурна стійкість, воєнна економіка, готельно-ресторанний бізнес, Україна.

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Statement of the problem. Ukraine's hotel-and-restaurant complex (HRC) has functioned under martial law since 24 February 2022, absorbing physical damage, mass population displacement, a near-total collapse of inbound leisure tourism, and, since the intensification of strikes on energy infrastructure in winter 2022/2023, recurring interruptions to electricity, heating, and connectivity. Despite these conditions, hospitality is repeatedly identified as one of the sectors best positioned to contribute to near-term economic recovery, owing to its labour intensity, its capacity to absorb internally displaced persons into employment, and its short reinvestment cycle relative to heavy industry. The sector also carries direct fiscal significance for local budgets through the municipal tourist tax, linking its recovery to the financial capacity of front-line-adjacent and rear-area communities alike.

At the same time, the sector's ability to function under wartime conditions has depended heavily on its capacity to adapt operationally and digitally: to redistribute demand across booking channels, to manage volatile occupancy through dynamic pricing, to maintain guest communication and payment acceptance during blackouts, and to substitute grid electricity and wired internet with autonomous alternatives such as generators, solar installations, and satellite connectivity. This adaptation occurs against constrained access to capital, reduced qualified staff owing to mobilisation and emigration, and heightened security risk, all of which limit the pace of digital investment even where its benefits are well understood.

International literature has extensively documented the relationship between digital transformation and hospitality performance, proposing formal digital-maturity models and models linking digital adoption to revenue-management outcomes and to the formalisation of previously informal economic activity. This literature, however, has been developed predominantly outside conflict settings, and the few studies addressing the Ukrainian hospitality sector under martial law either describe adaptation strategies in general terms or examine digitalisation's association with competitiveness using cross-country, EU-level data, without connecting a formal digital-maturity construct to the sector's own, Ukraine-specific socio-economic performance over the full-scale war.

This gap is not merely descriptive: if digital maturity functions as a determinant of resilience and socio-economic efficiency under wartime conditions, this has direct implications for how public statistics should be interpreted, which digital investments enterprises should prioritise under budget and security constraints, how recovery programmes should be designed, and how local authorities should plan tourist-tax revenue given its sensitivity to digital-formalisation effects rather than visitor volume alone. This study addresses the gap by extending the author's previously proposed Digital Maturity Index (DMI) / Socio-Economic Efficiency Index (SEEI) framework with an infrastructure-resilience dimension, applied to real sectoral data on the Ukrainian HRC for 2022-2026.

Analysis of recent research and publications. The relationship between digital transformation and hospitality performance has been studied extensively; a bibliometric review of 2,527 articles (2000-2023) identified digital technology adoption, stakeholder outcomes, online purchase determinants, and review analysis as dominant research themes [1]. Formal digital-maturity models have since emerged: Tang [2] identified four dimensions of hotel digital maturity, namely strategy and organisation, digital technology, digital capabilities, and integrated business, while Nikopoulou et al. [3], using a technology-organisation-environment framework validated by partial least squares structural equation modelling on 502 hoteliers, found that digital maturity, financial-resource availability, and government regulation predict technology adoption, with shock-affected firms adopting faster.

Bento [4] showed that crisis-period financial sustainability depends on shifting from static, demand-based pricing toward dynamic, digitally supported, value-based pricing, providing a direct theoretical basis for interpreting Ukraine's revenue-occupancy divergence discussed below. Hu et al. [5] found that digital transformation can either exacerbate or mitigate investment-financing maturity mismatch in hospitality and tourism firms depending on firm-specific conditions, while Franz and Cruz [6] extended the maturity-model logic from individual enterprises to destination-level governance. Aguilar et al. [7], analysing panel data for 101 economies (2014-2019), found that digital-payment adoption raises GDP-per-capita growth and reduces informal-sector employment, a mechanism directly relevant to the tourist-tax formalisation trend documented for Ukraine below.

Research on the Ukrainian hospitality sector has taken two directions. Zhuravka et al. [8], surveying 282 hospitality-business representatives across ten regions, found that 23% of enterprises had suspended and 54% functioned only partially in 2022, while 36% had already adapted their strategies. Koval and Katyukha [9] identified personalised service, digital-accessibility integration, rational resource use, energy independence, and social-support integration as the principal adaptation levers of Ukrainian hospitality enterprises, mapping closely onto the dimensions this study formalises, but without a quantitative index. Pereguda and Kryvoberets [10], publishing in the same journal series, linked the ICT sector's economic share to hotel occupancy across EU member states as a determinant of competitive advantage, treating Ukraine only briefly and without disaggregated national statistics or an explicit resilience construct.

Highlighting previously unresolved parts of the overall problem. Three specific gaps follow from the literature reviewed above. First, none of the reviewed studies combines a formal, multi-domain digital-maturity construct, such as that proposed by Tang [2] or Nikopoulou et al. [3], with an infrastructure-resilience dimension suited to a wartime environment characterised by deliberate attacks on energy and communications infrastructure; existing resilience-oriented Ukrainian studies [8; 9] describe relevant adaptation practices narratively but do not embed them in an index structure. Second, the revenue-management and digital-formalisation literature [4; 7] has not previously been applied to Ukrainian sectoral statistics to test whether the divergence between demand-side and revenue-side indicators, documented below, is consistent with these mechanisms. Third, the closest existing study within the same research environment, Pereguda and Kryvoberets [10], analyses digitalisation and competitiveness using cross-country, EU-aggregated data, leaving open how digital maturity relates to Ukraine's own, regionally disaggregated wartime performance. The present study closes these three gaps jointly, since they are conceptually interdependent: an infrastructure-resilience dimension is meaningful only if it relates to measurable revenue and formalisation outcomes, and those outcomes can be properly interpreted only using Ukraine's own statistics rather than cross-country proxies.

Formation of the objectives of the article (task statement). The aim of this study is to determine how digital maturity, extended with an infrastructure-resilience dimension, relates to the operational and socio-economic efficiency of Ukrainian hotel-and-restaurant complexes over 2022-2026, using publicly available sectoral statistics rather than primary enterprise-level survey data.

To achieve this aim, the following objectives are addressed: (1) to systematise the digital-maturity, revenue-management, and hospitality-resilience literature into a domain structure applicable to a wartime operating environment; (2) to characterise the performance of the Ukrainian HRC sector in 2022-2026 using public statistics on occupancy, booking-channel structure, tourist-tax receipts, and cross-border arrivals; (3) to map the observed statistical patterns onto the domains of the author's previously proposed DMI/SEEI framework, in order to identify which digital domains show the strongest association with wartime resilience; (4) to substantiate, on this empirical basis, an extension of the DMI framework with an infrastructure-resilience sub-domain; and (5) to formulate practical and policy recommendations for enterprise digitalisation strategy and for state- and donor-funded recovery programmes.

Summary of the main research material. This study uses a documentary and comparative-statistical research design, deliberately excluding primary survey or interview data collection; all quantitative evidence is drawn from secondary public sources, namely the State Statistics Service of Ukraine, the State Agency for Tourism Development [11], the Institute for Economic Research and Policy Consulting monthly enterprise survey, and industry analytics published by Opendatabot and by the hospitality-management group Ribas Hotels Group, cited via RBC-Ukraine [13], LIGA.net [12], Censor.net [15], and NV Business [14; 16]. Systematisation of the literature reviewed above is used to construct the domain structure of the extended DMI/SEEI framework, and a qualitative mapping procedure, consistent with the methodological approach used in the author's earlier study establishing this framework, is then applied to align each observed statistical pattern with the domain it most directly reflects, drawing on the mechanisms identified by Bento [4] for revenue management and by Aguilar et al. [7] for digital-payment-driven formalisation. The analysis covers the period from February 2022 through the 2025/2026 winter season, comparing regions with materially different security and infrastructure conditions: the capital

and major western and central cities (Kyiv, Lviv), Carpathian mountain-resort destinations (Bukovel and the wider Carpathian region), the southern coastal destination of Odesa, and the national aggregate. All statistics are aggregated at the regional or national level, so the study cannot isolate an individual enterprise's digital-maturity score or establish enterprise-level causality; several indicators are drawn from industry analytics rather than peer-reviewed sources and are treated as descriptive market evidence, cross-checked against official data where available.

In 2024, Ukraine recorded 2.55 million entries by foreign citizens, and the State Agency for Tourism Development registered 181,532 hotel arrivals by foreign citizens nationwide, more than 70% concentrated in Kyiv [11]. By 2025, the recovery of foreign arrivals was estimated at approximately 60% of the pre-war 2019 level [12]. Despite this only partial recovery in physical visitor volume, financial indicators moved considerably faster: hotel-industry revenue reached UAH 53.3 billion in 2025, with related tax receipts exceeding UAH 4.4 billion [13], and municipal tourist-tax receipts reached a record UAH 142.6 million in the first half of 2025 alone, 33% higher than the same period of 2024, and 52% higher for full-year 2025 than in 2021, the last pre-invasion year [14; 15]. Hotel-nights subject to the fee grew only from 9.4 million in 2021 to 10 million in 2025, roughly 6%, while nominal receipts over a comparable period grew by more than half [15]. This divergence between single-digit volume growth and double-digit-to-several-fold revenue and fiscal growth is directly consistent with the revenue-management mechanism identified by Bento [4]: enterprises shifting toward dynamic, digitally supported pricing capture more guest spending independently of visitor-volume recovery. The parallel fall in the share of accommodation-fee receipts paid by formally registered hotels, from 62% to 55%, with private micro-hosts' share rising correspondingly [14], is consistent with the formalisation mechanism documented by Aguilar et al. [7]: as digital payment and booking infrastructure expands, previously informal accommodation activity becomes newly visible to tax authorities even without underlying visitor growth.

For the 2025/2026 winter season, direct website bookings rose to 25-30% of total bookings, while the share taken by online travel agencies fell to 10-20%; social-media channels, particularly Instagram and Telegram, combined with administrator- and chatbot-driven sales, now account for up to 60% of bookings, and the average booking window lengthened from 7-14 days to 21-35 days [16]. This channel restructuring is a direct, measurable expression of the distribution-and-revenue-management domain of digital maturity, consistent with the mechanism described by Bento [4], and indicates the accumulation of first-party guest databases, direct-marketing capability, and conversational-commerce tooling across a large share of operating enterprises.

National average hotel occupancy for 2026 stood at approximately 25-26%, but this aggregate masks pronounced regional divergence: Carpathian mountain-resort destinations were projected to reach 85-95% winter occupancy for the 2025/2026 season, urban business-hotel segments 50-65%, and Odesa 45-65% depending on property concept

Table 1

National indicators of demand, revenue, and fiscal contribution of the Ukrainian hotel sector, 2024-2025

Indicator	Value	Comparison base
Foreign entries to Ukraine, 2024	2.55 million	≈60% of the 2019 pre-war level (2025 est.)
Foreign-citizen hotel arrivals, 2024	181,532	>70% concentrated in Kyiv
Hotel-industry revenue, 2025	UAH 53.3 billion	Related tax receipts > UAH 4.4 billion
Tourist-tax receipts, H1 2025	UAH 142.6 million	+33% vs H1 2024
Tourist-tax receipts, full-year 2025	+52%	vs 2021 (last pre-invasion year)
Hotel-nights subject to tourist tax	9.4m (2021) → 10m (2025)	+6% in nights vs +52% in receipts
Share of tax paid by formal hotels/large facilities	55% (was 62%)	Remainder: private micro-hosts, up from 38%

Source: compiled by the author based on [11-15]

Table 2

Change in the structure of hotel booking channels, 2025/2026 season

Channel / indicator	2025/2026 season	Prior pattern
Direct website bookings	25-30%	Lower, OTA-dominated distribution
Online travel agencies (Booking, Expedia, etc.)	10-20%	Historically the dominant channel
Social media, administrators, chat-bots	up to 60%	Marginal or non-existent before 2022
Average booking window	21-35 days	7-14 days

Source: compiled by the author based on Ribas Hotels Group research [16]

[16]. Kyiv, Lviv oblast, and Ivano-Frankivsk oblast together accounted for 58% of national tourist-tax receipts in the first half of 2025, while Odesa's receipts fell to roughly half of their 2021 level and the Bukovyna and Carpathian region grew three-to-fourfold over the same comparison [14]. This regional pattern cannot be attributed to digital maturity alone, since proximity to the frontline and the physical integrity of energy infrastructure are evidently first-order determinants of regional performance; however, the qualitative adaptation evidence discussed above [9], together with the observed demand shift toward properties offering privacy, autonomy, reliable connectivity for remote work, and wellness positioning [16], indicates that infrastructure-resilience investment functions as a necessary complement to, rather than a substitute for, distribution- and revenue-management digitalisation. A hotel with a fully digitalised booking funnel but no operational continuity during a blackout cannot convert demand into revenue, while energy-resilient properties are disproportionately able to capture remote-work-adjacent demand precisely because that segment requires uninterrupted connectivity, itself a digital-infrastructure outcome.

Table 3

Regional divergence in hotel occupancy, winter 2025/2026 season

Region / segment	Winter 2025/2026 occupancy
Carpathian mountain resorts (incl. Bukovel)	85-95%
Major cities, business-hotel segment	50-65%
Odesa (coastal/urban)	45-65%, by concept
National average (2026)	25-26%

Source: compiled by the author based on Ribas Hotels Group research [16]

Table 4 synthesises the statistical evidence above by mapping each observed wartime market pattern onto the domain of the DMI/SEEI framework it most directly reflects, together with the resulting resilience or efficiency implication. This mapping operationalises the proposed infrastructure-resilience sub-domain as a fifth element of the DMI, alongside the pre-existing distribution, revenue-management, formalisation, and personalisation domains.

Based on this analysis, recommendations follow for each domain of the framework. In distribution and revenue management, enterprises should invest in owned booking infrastructure and dynamic pricing rather than exclusive reliance on OTAs, while state and donor programmes could co-finance training in digital revenue management. In transaction formalisation, enterprises should adopt digital payment acceptance, while policy should simplify digital registration for micro-accommodation providers, accelerating the effect identified by Aguilar et al. [7]. In guest personalisation, enterprises should develop digital offerings for workation and wellness demand, while destination-management bodies could support digital-maturity assessment along the lines proposed by Franz and Cruz [6]. In infrastructure resilience, enterprises should treat energy autonomy and redundant connectivity as a precondition for digital investment rather than a separate budget line, while recovery financing should be conditioned on infrastructure-resilience criteria alongside conventional digitalisation-support measures. Aggregated secondary data cannot establish enterprise-level causality, and industry-analytics sources should be read as descriptive market evidence rather than peer-reviewed measurement; the mapping in Table 4 is a conceptual synthesis consistent with the available evidence, and testing the proposed infrastructure-resilience sub-index

Table 4

Mapping of observed wartime adaptation patterns onto the extended DMI/SEEI framework

DMI/SEEI domain	Observed wartime pattern	Indicator	Implication
Distribution / revenue management	OTA → direct and social/ chatbot channels; longer booking window	Direct 25-30%, OTA 10-20%, social up to 60%	Higher margin capture; less dependence on OTAs
Revenue / fiscal efficiency	Revenue and tax receipts grow faster than occupancy and nights	Tax +52% vs nights +6%	Efficiency partly decoupled from demand recovery
Formalisation of transactions	Falling share of formal players in tax receipts as micro-hosts register digitally	Formal-facility share: 62%→55%	Broader capture of informal activity in statistics
Guest personalisation	Demand shift to apart-hotels/cottages, wellness, workation	Qualitative industry evidence	Demand retention, premium positioning
Infrastructure resilience (new sub-domain)	Energy independence and connectivity redundancy as adaptation priority	Occupancy 25-26% (national) to 85-95% (Carpathians)	Precondition for converting demand into revenue

Source: developed by the author, synthesising the data in Tables 1-3 with [4; 7; 9]

against enterprise-level digital-maturity scores is identified as a priority direction for further, primary-data research.

Conclusions. This study examined how digital maturity, extended with an infrastructure-resilience dimension, relates to the operational and socio-economic efficiency of Ukraine's hotel-and-restaurant complex during 2022-2026, using public statistics rather than primary survey data. Three empirical patterns support the study's central claim. First, hotel-industry revenue and tourist-tax receipts have grown considerably faster than occupancy and taxed hotel-nights, consistent with digital revenue-management and formalisation effects operating alongside, and partly independently of, visitor-volume recovery. Second, the distribution-channel structure has shifted decisively away from online travel agencies toward direct and social-media channels, consistent with growing first-party digital-marketing capability across the sector. Third, regional performance diverges sharply along lines that track both security conditions and infrastructure resilience, indicating that energy and connectivity autonomy complement distribution-side digitalisation rather than being a secondary concern.

These findings support extending the author's previously proposed Digital Maturity Index / Socio-Economic Efficiency Index framework with an explicit infrastructure-resilience sub-domain, encompassing energy autonomy, connectivity redundancy, and operational continuity under blackout conditions, alongside the framework's existing distribution, revenue-management, formalisation, and guest-personalisation domains. This extension differentiates the present analysis from prior Ukraine-focused adaptation-strategy research, which describes similar practices without a formal index structure, and from cross-country digitalisation-competitiveness studies, which link ICT intensity to hotel performance without disaggregated Ukrainian sectoral data or a resilience construct.

The practical value of the study lies in its recommendations: hospitality enterprises operating under wartime conditions should treat infrastructure-resilience investment as inseparable from digital-distribution investment when allocating limited capital, while state- and donor-funded recovery programmes should consider infrastructure-resilience criteria alongside conventional digitalisation-support measures and simplified digital-registration procedures for micro-accommodation providers. Prospects for further research include testing the proposed framework extension against enterprise-level primary data and quantifying the relative contribution of each domain to sectoral revenue and fiscal efficiency using panel-data methods.

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Дата надходження статті: 27.07.2026
Дата прийняття статті до публікації: 29.10.2026
Дата публікації статті: 06.11.2026