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MARKETING RESEARCH OF THE PECULIARITIES OF CONSUMERS' BEHAVIOUR IN THE MARKET OF RESTAURANT SERVICES

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МАРКЕТИНГОВЕ ДОСЛІДЖЕННЯ ОСОБЛИВОСТЕЙ ПОВЕДІНКИ СПОЖИВАЧІВ НА РИНКУ РЕСТОРАННИХ ПОСЛУГ

Objective. *The objective of the article is to carry out the marketing research of the peculiarities of consumers' behaviour in the market of restaurant services.*

Methods. *The research is based on the dialectical method of scientific knowledge, methods of scientific abstraction, analysis and synthesis (while studying the reasons for Ukrainian consumer preferences for traditional home food; while summarizing the peculiarities of the Ukrainian and U. S. restaurant business functioning); systematic generalization (while substantiating the Ukrainian and global restaurant industry development trends); comparative analysis (while comparing the structure of restaurant venues and the peculiarities of consumer behaviour in Ukraine and in the USA); statistical analysis (while studying the dynamics of the restaurant industry development in Ukraine and globally).*

Results. *The dynamics of development of the Ukrainian and world restaurant industry is analyzed in the article; the structure of restaurants and features of consumer behaviour in Ukraine and in the United States are compared. the tendencies of development of the market of restaurant services are substantiated. Key areas for the development of restaurant enterprises in Ukraine are proposed: reducing and slowing the growth rate of the industry in the next three to five years due to the global pandemic 2020; growth of restaurant delivery services, development of intermediary companies, creation of restaurants own delivery services; reduction of the prime cost of the food-stuff made at the expense of economy of the salary of service personnel, aggravation of the price competition in the market of restaurant services. The obtained results are of practical importance for restaurant enterprises and can be used to develop a marketing positioning strategy.*

Key words: *restaurant business trends, marketing research, consumer behaviour, restaurant services, restaurant industry, marketing.*

Introduction. By 2020, the restaurant industry around the world had been growing rapidly as a result of the world tourism development and the improvement of the standard of living of the population of many countries. In the United States in particular, sales in the restau-

rant services sector have grown by 20.9 times in the last fifty years. In 2020, the US sales in the restaurant industry were projected to reach the record level amounting USD 899 billion (that is USD 309 billion more than in 2010) along with opening up more than 1 million new business-

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es in the industry. Of course, the new realities of life — the 2020 global viral pandemic and the consequential reboot of the economic system — will make adjustments to the restaurant industry and supporting industries development globally, but to date 15.6 million people are employed in the US restaurant industry (that is 3.4 million more than in 2010) with 1.6 million jobs are expected to be created by 2030 (Restaurant Industry Facts, 2019).

As for Ukraine, despite the complex processes in the economic, political and social life of the country, the restaurant industry was also developing rapidly during 2015–2020. For the Ukrainian economy, the restaurant industry is one of the potentially important areas that can provide consistently high revenues to the state and local budgets and support tourism business development. Therefore, the topical areas of research concern studying the global restaurant industry development trends and the consumer behavior peculiarities that determine the lines of each country market development, as well as the adaptation of the best foreign practices in Ukraine

Analysis of recent research and publications. Obozna A. O., Shabelnyk N. M., Fedotov I. A. have substantiated «the formation of the restaurant industry efficiency based on hierarchical levels. And behavioral processes form the first such level meeting the needs for livelihoods and well-being and developing subject to compliance with international trends and standards of the restaurant industry» (Obozna A. O., 2019). The authors have also suggested the key lines of restaurant venues marketing activity on the basis of behavioral analysis.

Danylenko O. V., Zotsenko L. M., Bratitsel M. L. encourage Ukrainian restaurateurs to join the global restaurant industry development trends, and indicate that it is necessary that the FoodTech digital food technologies take root much more broadly in all stages of business activities in Ukraine (Danylenko O. V., 2019).

Podolna V. V., Vartova M. B. focus on proposals for the use of various types of incentives in the restaurant industry, which significantly increase employee productivity and make workers more interested in the effectiveness of their

work and the functioning of the entire venue. Also, scientists have defined the concept of the «venue promotion in the field of restaurant industry.» (Podolna V. V., Vartova M. V., 2017)

Vovchanska O. M., Ivanova L. O. have analyzed the structural changes in supply and demand in the dominant regional segments of the global market of restaurant services, changes in the corporate structure, aspects of the restaurant services diversification (Vovchanska O. M., Ivanova L. O.).

However, there has been little research in the economic literature into issue of studying consumer behavior peculiarities in the market of restaurant services in countries that determine their development trends, so that it needs further study.

Purpose. The objective of the article is to carry out the marketing research of the peculiarities of consumer's behavior in the market of restaurant services.

Findings.

The development of the global market of restaurant services is conditioned by the peculiarities of consumer behavior in the countries, as well as by the numerous factors of the marketing environment that determine the development lines of the market of restaurant services.

The peculiarities of Ukrainian consumer behavior compared to European and American consumers, for whom eating out is a part of modern life, and that cause the public catering industry to experience the highest growth rate among the regions of the world, are the following: about 70 % of the country's population prefer to eat at home (Figure 1).

However, 48 % of Americans eat at a restaurant permanently (Gilbert, 2019), 63 % say they would prefer to visit a restaurant rather than buying in-store products, with 61 % choosing to order takeout or delivery (Restaurant Industry Facts at a Glance, 2019).

Also, according to statistics, today in the United States, 51 % of Americans use a delivery service, 26 % order delivery once a week (Restaurant takeout and delivery are taking a bite out of dine-in traffic, 2019). In Ukraine, only about 15–16 % (4 million people) order food online, the restaurant delivery market is esti-

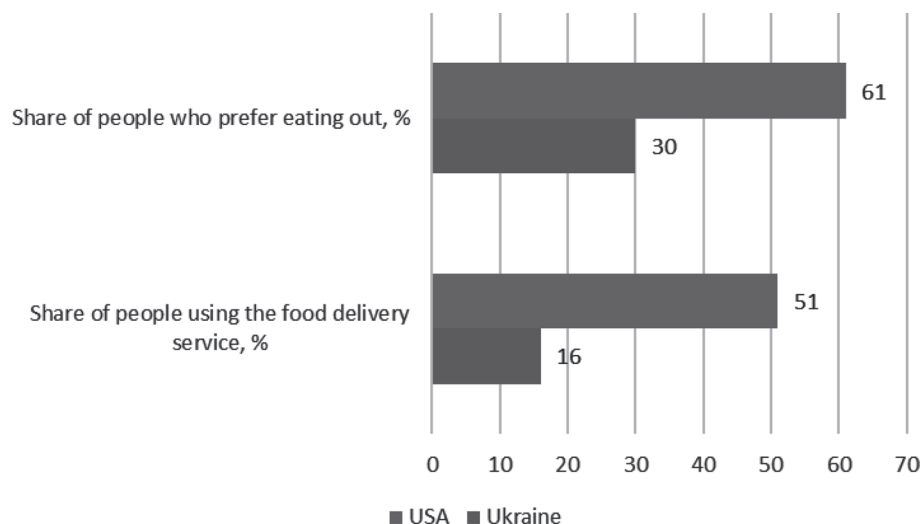


Fig. 1. Comparison of consumer behavior peculiarities in the USA and Ukraine (compiled by author)

mated at USD 230 million a year, and in 2018 about 10 % of Ukrainian restaurants operated online. In 2015–2017, demand for food delivery increased by 40 %, from 6.5 to 16 thousand per month (Danylenko O. V., Zotsenko L. M., Bratitsel M. L., 2019).

In Ukraine, consumers prefer traditional home food. This is explained, first of all, by the lack of culture of eating at restaurants among the residents aged over 45 years, since for a long time, while Ukraine was being a part of the USSR, visiting a restaurant was considered as an exceptional event in human life. Secondly, films and TV shows created an image of a person who frequently visits a restaurant associated with a socially negative phenomenon and demonstration of avoiding hard work and work in general. Thirdly, for many years the initial restaurant industry development in Ukraine was associated with poor quality products and services, along with a strong conviction that home-cooked food is healthier than one cooked at a restaurant. Fourth, most consumers receive low income (the average consumer wage in Ukraine in February 2020 amounted to UAH 10,847 (Minfin, 2020), i. e. USD 386, while the average consumer wage in the USA amounted to USD 3620 (Samechas, 2020) and they prefer to eat at home for cost savings.

A comparison of the U. S. and Ukrainian consumers cost structure is shown in Figure 2 (Slovo i dilo, 2019; “Consumer Expenditure Survey”, 2016).

Compared to Ukrainian consumers, who spend 44.5 % of their income on eating both at home and out, American consumers spend 31–33 % less on food (Figure 2), with the Restaurant Performance Index (RPI), that is a monthly summary index that tracks the status and outlook of the U. S. restaurant industry and was over 100 in 2019 (“Restaurant Performance Index”, 2019). It indicates the promotion of the restaurant industry development, which in turn forms 4 % of GDP (National Restaurant Association, 2019).

In 2010–2018 the sales volume in Ukraine was 2.58 times higher (Figure 3).

At the same time, the growth rate of the restaurant services and mobile catering services sales volume during this period amounted to 6 (State Statistics Committee of Ukraine, 2020). And despite the successful 2013, when holding the Euro-2012 football championship contributed to the increase of restaurant services and mobile catering services sales volume by 1.36 times, in 2014 the restaurant services sales volume decreased sharply by UAH 3154.1 million (by 16.5 %).

This was due to the comprehensive economic and political crisis in the country and the start of hostilities in Eastern Ukraine.

At the same time, the share of restaurant products sales volume in the total sales volume in Ukraine during 2015–2018 was steadily increasing (by 0.13 pp over four years), and during 2010–2018 it has increased by 2.13 times

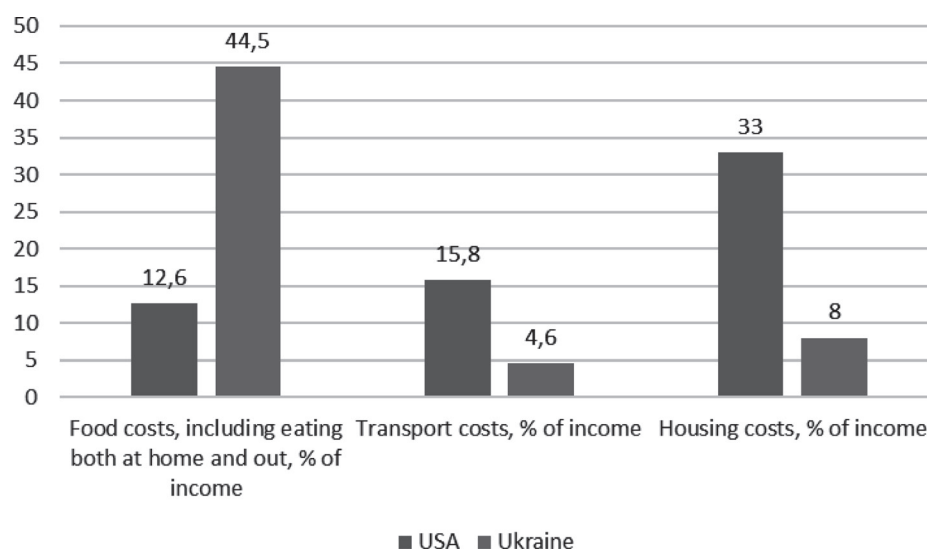


Fig. 2. Comparison of the structure of major consumer expense groups in the USA and Ukraine (compiled by author)

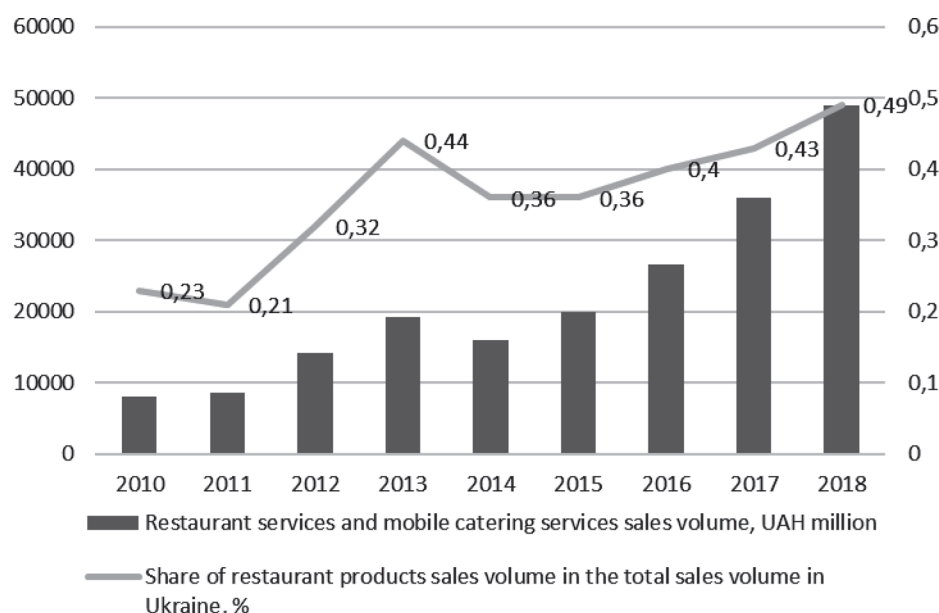


Fig. 3. Dynamics of the restaurant services sales volume and the share of restaurant products sales volume in the total sales volume in Ukraine during 2010–2018 (compiled by author)

in general. According to the report of the Kiev International Institute of Sociology in Ukraine, there is a following trend: the younger people are, the more often they go out to eat. There are 55 % of such people among those under 30, 45 % among those aged 30–39, 33 % among those aged 40–49, and further this share is falling rapidly. Also, traditionally, men under 40 are 1.4 times more likely to go out to eat than women of the corresponding age. The share of visitors to food and drink venues is approximately the same in the Western, Central and Southern regions (31–33 %), and it is signifi-

cantly lower (20 %) among residents of the East (Kharchenko N., 2018).

Another peculiarity of consumer behavior of the Ukrainian residents is the preference for budget-friendly food and drink venues: 40 % of all visits are for cafes or bistros, 18 % for pizzerias, 17 % for cafes, 17 % for buying ready meals at street stalls / food stalls (Kharchenko N., 2018).

As indicated by Obozna A. O., Shabelnyk N. M., Fedotov I. A., in Ukraine the restaurant business has not yet reached the international level and is only in its infancy stage.

The dynamic development of this type of economic activity causes the emergence of restaurant venues of different types and price categories, which gives consumers the opportunity to choose the restaurant venue that suits them the most by all criteria (Obozna A. O., 2019).

The structure of restaurant venues in Ukraine and the USA is shown in figure 4. In general, analyzing the structure of restaurant venues in Ukraine and the USA, it can be noted that both in Ukraine and in the USA a greater share of the market is held by cafes. The second place in both countries is occupied by restaurants, but in the USA the share of restaurants is less than the share of cafes by 4 %, i. e. their shares in the structure of the country restaurant industry are almost equal. This is due to the effective demand for better services, that means restaurant services. In Ukraine, the share of restaurant venues, though occupying the second position in the market, is less than the share of cafes by 34 %, which is explained by the low effective demand for the restaurant products, because the visits to restaurant imply a bigger average check size, since usually the one is expected to have a full meal at the restaurant but not just a cup of tea; low average wages; the absence of the middle class in society.

At the same time, the share of bars in Ukraine, which amounts to 16 %, is larger than the share of canteens by 6 %, while in the USA the share of canteens is significantly larger than the share of bars, the difference amounts to 18 %. This is due to the high popularity of the fast food, as 36.6 % of Americans eat fast food on a daily basis (Vojinovic I., 2019) and very often choose the fast food networks, the most common of which are Subway (24,798 venues as of 2018), Starbucks (14,825 venues as of 2018), McDonald's (13,914 venues as of 2018) (Statista, 2018). It should be noted that as of 2018, there were 4,976 restaurants in Ukraine, that is 0.75 % of the corresponding U. S. indicator.

Restaurants and seats availability for Ukrainian population is several times lower than the world level, but it is beginning to increase (Obozna A. O., 2019).

Despite the positive trends in the restaurant industry in the USA, Ukraine and most of Eu-

ropean and Asian countries, the first and foremost restaurant industry development trend will be its reduction and slowing down the industry growth rate in the next three to five years due to the global pandemic 2020. The rapid spread of the virus among the population of countries across all the continents has led to the closure and reduction of the work of restaurant venues. In the near future, restaurant service consumers may be avoiding the large crowds, that will mostly affect the bars, cafes and restaurants that are not focused on delivering products quickly to the consumer, the basic concept of which is "communicating with friends, colleagues and family over a cup of coffee".

The second major trend is the growth of restaurant delivery services. This contributes to the development of intermediary companies that do not manufacture the products themselves but transport them to the consumer, and encourages restaurants to establish their own delivery services.

In particular, according to Statista, worldwide revenue in the online food delivery segment in 2020 will amount to USD 122,739 million, it is expected to show a revenue annual growth rate of 7.5 %, bringing the market value to USD 164,002 million by 2024 (Statista, 2019).

Given that this assessment was made before the COVID-19 pandemic, it may be assumed that the revenue will be much higher due to the need for social distancing.

Global trends indicate a gradual replacement of off-line orders by the online ones. Thus, during the 2019–2020 there is the redistribution of the market of restaurant services ordering in favor of online facilities, in particular in 2019, for the first time the share of online orders got larger than one of the off-line orders, it amounted to 53 %. In 2020 the share of online food ordering is expected to increase by another 5 pp; online orders in 2019 have increased by 34 pp compared to 2015 (The changing market for food delivery, 2016).

Due to the complete change in health care approaches in the wake of the COVID-19 pandemic 2020, the society will immediately switch to online ordering and only venues with a well-

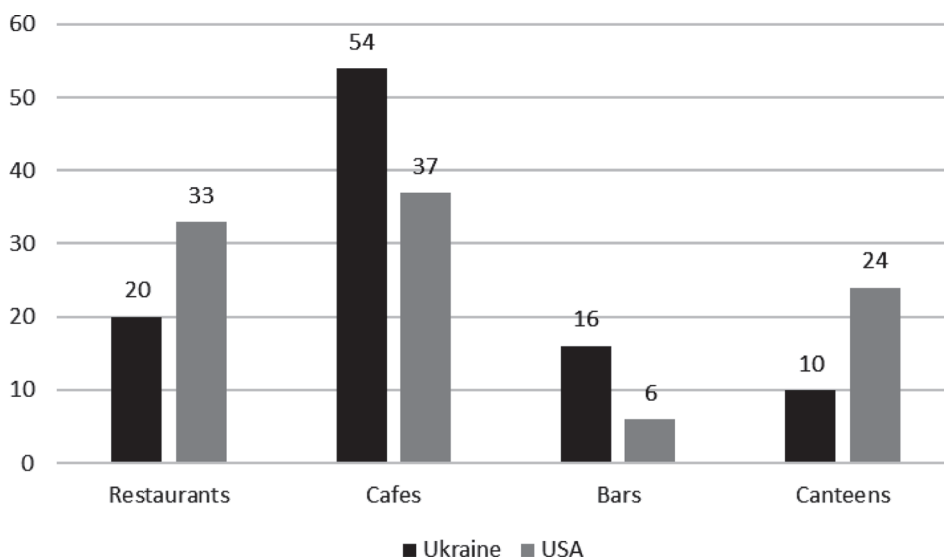


Fig. 4. Structure of restaurant venues in Ukraine and the USA, %
(compiled by author)

established ordering and delivery system will be able to survive the economic crisis.

Increasing of the share of delivery from virtual restaurants may, in turn, reduce the cost of food produced by saving on staff salaries, which will accelerate sales and sharpen price competition in the market of restaurant services. During seasonal or atypical viral epidemics, restaurants are an industry that is losing revenue faster than others, so establishment of their own delivery services may strengthen their business positions among competitors in the market.

Another benefit of the system of online delivery ordering for a restaurant service provider is that it gives you a deeper understanding of your target customer's needs by tracking his or her orders and, in the future, you will be able to incorporate the relationship marketing concept in your business in a more efficient way. It will allow to establish long-term relations with the consumer and to adjust the offer according to the client's needs.

Consumer are paying increasing attention to reading online restaurant reviews before visiting, so the restaurant business can no longer exist without online presence on Facebook or Instagram. Restaurant venue presence on Facebook or Instagram is important not only because it allows to get consumers feedback and provides a live exchange of experiences, but also because it is the basis for advertising their restaurant products among a specific target con-

sumer segment and a way to expand the consumer audience. Today, 68 % of restaurant operators use Facebook to promote their business, while 24 % use Instagram (Vojinovic I., 2020), although in the near future the experts expect the situation to change in favor of Instagram. For example, if in 2013 the number of active users per month in Ukraine amounted to 90 million people, in 2018 this number increased to 1 billion. 72 % of teens use Instagram, and the share of adult Instagram users has increased by 9 % over four years. During 2013–2018, the share of users aged 18–24 increased by 34 pp (Instagram by numbers: 2019 statistics, 2019). According to statistics, 74 % of millennials choose delivery rather than eating out when it comes to a regular lunch or dinner.

Instagram is a social network, gaining momentum among millennials, who form the largest consumer group ordering on-line. Additionally, statistically only every eighth publishes the review of his restaurant visit, whereas a photo of a nice place, a nice meal or a drink on Instagram is a more popular post. In 2018 the number of users in Ukraine increased by 50.7 % to 11 million, Instagram is mostly used by young audience aged 18–24 (91.04 % of all residents of the country in this age group are Instagram users) (Retailers, 2019).

One of the main trends in the Ukrainian restaurant industry development in recent years has been being its computerization, in particu-

lar, special applications that accelerate the food ordering and delivery, online booking services, payments via the mobile application system, automatic check distribution among customers, etc. get increasingly popular.

For the USA, the restaurant industry computerization is nothing new, but new franchises with self-service kiosks and mobile apps for ordering and payment have been planned. Another future fast food restaurants peculiarity in the United States is avoiding plastic waste. Innovations such as eco-friendly packaging will continue to evolve over the coming years.

The development of fast food franchises with the concept of the use of healthy ingredients and healthy food may also be considered a peculiarity of the U. S. restaurant industry development in the coming years. Meanwhile, the leaders of the U. S. fast food market, such as Subway, Starbucks, McDonald's, plan to move from frozen to fresh raw materials, containing less harmful impurities. Some specific networks offer vegetables as a main or first course, transforming the concept of fast food from fast and junk to fast and wholesome.

One of the peculiarities of the Ukrainian restaurant industry is that the low average income in the country and the slow growth of the purchasing power of the population will contribute to the development of fast food franchises rather than to the development of the restaurants serving signature dishes. In 2018 there were about 80 franchise offers in the field of public catering with the market turnover amounting to UAH 52 billion per year and experts predicted its gradual increase to the pre-crisis UAH 65–80 billion (Delo, 2019). However, given the new economic realities following the crisis, caused by pandemic 2020, it is safe to say that the franchise market turnover in the public catering sector will decline and will not reach 2013 levels in the next five years.

Conclusions. Thus, in the article:

— the reasons for Ukrainian consumer preferences for traditional home food rather than eating at restaurants have been identified. In particular, such reasons include the lack of culture of eating at restaurants and the traditionally created image of a restaurant as a socially

negative phenomenon wide-spread among residents over 45 years; a negative image of restaurants as enterprises with poor quality products and services created over the years of independence of the country; belief that home-cooked food is healthier than one cooked at a restaurant; low consumer income and need for cost savings;

— it has been identified that during 2010–2018 the restaurant services and mobile catering services sales volume has increased by 6 times, with the share of restaurant products sales volume in the total sales volume in Ukraine has increased by 2.13 times;

— the peculiarities of consumer behavior in the Ukrainian and U. S. market of restaurant services have been identified, in particular, the share of visitors to food and drink venues in Ukraine is in the range of 20–33 %, which is almost twice lower than in the USA; in the structure of restaurant venues in Ukraine and the USA a greater market share is held by cafes, the second place in both countries is occupied by restaurants, but in the USA the shares of cafes and restaurants in the structure of the country restaurant industry are almost equal, while in Ukraine the share of restaurant venues, though occupying the second position in the market, is less than the share of cafes by 34 %; the share of bars in Ukraine is larger than the share of canteens by 6 %, while in the USA the share of canteens is significantly larger than the share of bars, the difference amounts to 18 %; in Ukraine, only about 15–16 % of the population order food online, while in the USA the share of people ordering food online amounts to 51 %;

— the following global and Ukrainian restaurant industry development trends have been identified: reduction and slowing down the industry growth rate in the next three to five years due to the global pandemic 2020, that will mostly affect the bars, cafes and restaurants that are not focused on delivering products quickly to the consumer; growth of restaurant delivery services, development of intermediary companies, establishment by restaurants of their own delivery services; reduction of the cost of food produced by saving on the servicing staff salaries, which will accelerate sales and sharpen price

competition in the market of restaurant services; increasing the role of online restaurant reviews; development of restaurant industry computerization in Ukraine (special applications that accelerate the food ordering and delivery, online booking services, payments via the mobile application system, automatic check distribution among customers), for developed countries — distribution of new franchises with self-service kiosks and mobile applications for orders and payments, avoiding plastic waste, etc.

In the article, the peculiarities of the Ukrainian and U. S. restaurant business functioning have been identified; market of restaurant services development trends, which are connected with significant changes in technologies, peculiarities of consumer behavior in the Ukrainian and U. S. markets, market fluctuations, etc. have been substantiated. The results obtained are of practical importance for domestic and foreign enterprises, and may be used for management of restaurant business enterprises.

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Мета статті — проведення маркетингового дослідження особливостей поведінки споживачів на ринку ресторанних послуг.

Методи. В основі дослідження покладено діалектичний метод наукового пізнання, методи наукової абстракції, аналізу і синтезу (при вивченні причин споживачських уподобань щодо традиційного харчування українців вдома; при узагальненні особливості функціонування суб'єктів ресторанного бізнесу в Україні та у США); системного узагальнення (при обґрунтуванні тенденцій розвитку ресторанної сфери України та у світі); порівняльного аналізу (під час порівняння структури закладів ресторанного бізнесу, особливостей поведінки споживачів в Україні та США); статистичного аналізу (при вивченні динаміки розвитку ресторанного бізнесу в Україні та у світі).

Результати. У статті проаналізовано динаміку розвитку українського та світового ресторанного господарства; порівняно структуру закладів ресторанного господарства та особливості поведінки споживачів в Україні та США; обґрунтовано тенденції розвитку ринку ресторанних послуг; запропоновано ключові напрямки розвитку підприємств ресторанного господарства в Україні: зменшення та уповільнення темпів зростання галузі в найближчі три-п'ять років за рахунок глобальної пандемії 2020; зростання служб доставки ресторанів, розвиток посередницьких компаній, створення ресторанами власних служб доставки; зниження собівартості продуктів харчування, вироблених за рахунок економії заробітної плати персоналу обслуговування, загострення цінової конкуренції на ринку ресторанних послуг. Отримані результати мають практичне значення для підприємств ресторанного господарства і можуть бути використані для розробки стратегії позиціонування на ринку.

Ключові слова: тенденції ресторанного бізнесу, маркетингові дослідження, поведінка споживачів, ресторани, послуги, маркетинг.

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