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RESTAURANT BUSINESS FORESIGHT

Introduction. *Development management of the restaurant business is problematically oriented because exogenous and endogenous factors influence the efficiency of restaurant business establishments.*

Problem. The influence of external and internal factors of different hierarchical levels on the restaurant business actualizes the expediency of developing innovative and adaptive mechanisms of interaction with the subjects of economic relations, which are formed based on the use of cognitive modeling in the identification and selection of scenario vectors for predicting their development.

The aim of the article is the scientific substantiation of scenario vectors for forecasting the development of restaurant business establishments.

Methods. General scientific and special methods of cognition such as abstract-logical, comparison, analysis and synthesis, system approach,

ФОРСАЙТ РЕСТОРАННОГО БІЗНЕСУ

Вступ. Управління розвитком ресторанного бізнесу є проблемно орієнтованим, оскільки на ефективність діяльності закладів ресторанного бізнесу впливають екзогенні та ендогенні фактори.

Проблема. Вплив зовнішніх та внутрішніх чинників різного ієрархічного рівня на ресторанний бізнес актуалізує доцільність розроблення інноваційних та адаптивних механізмів взаємодії з суб'єктами економічних відносин, які формуються на основі застосування когнітивного моделювання в ідентифікації та виборі сценарних векторів прогнозування їх розвитку.

Мета статті – наукове обґрунтування сценарних векторів прогнозування розвитку закладів ресторанного бізнесу.

Методи. Застосовано загальнонаукові та спеціальні методи пізнання: абстрактно-логічний та порівняння; аналізу і синтезу, системного підходу, логічного та когнітивного моде-

logical and cognitive modeling, theoretical gene-ralization and formulation of conclusions were applied in the article.

Results. The dynamics of restaurant business establishments are analyzed and substantiated, and comparative monitoring of the volume of services sold by service sector enterprises by type of economic activity is carried out. The advan-tages, disadvantages, and risks of combining restaurant business establishments into multi-format chains have been identified.

Conclusions. The content of scenario vectors for forecasting the development of restaurant business establishments has been developed and characterized; it includes a focus on consumer values and need, collaboration of restaurant busi-ness entities and related food service companies, unification of formats and concepts of subjects of the restaurant business, restructuring of business models of restaurant business entities, techno-logical innovations to improve consumer safety and omnicidal marketing communication. Based on the above, the authors' interpretation of the concept of "business scenario" is provided.

Keywords: scenario forecasting, restaurant business entity, restaurant services market, cor-porate chains, partner chains, franchise chains, business scenarios.

лювання; теоретичного узагальнення та фор-мулювання висновків.

Результати дослідження. Проаналізо-вано та обґрунтовано динаміку діяльності закладів ресторанного бізнесу, здійснено порів-няльний моніторинг обсягу реалізованих пос-луг підприємствами сфери послуг за видами економічної діяльності. Визначено переваги, недоліки та ризики об'єднання закладів ресто-ранного бізнесу в різноформатні мережі.

Висновки. Розроблено та охарактеризо-вано зміст сценарних векторів прогнозування розвитку закладів ресторанного бізнесу, до яких віднесено: орієнтацію на споживчі цін-ності та потреби; колаборацію суб'єктів рес-торанного бізнесу та супутніх компаній з фуд-сервісу; уніфікацію форматів та концепцій суб'єктів ресторанного бізнесу; реструкту-ризацію бізнес-моделей суб'єктів ресторан-ного бізнесу; технологічні інновації для під-вищення безпеки споживача; омнікальну марке-тингову комунікацію. На підставі зазначе-ного надано авторське тлумачення поняття "бізнес-сценарії".

Ключові слова: сценарне прогнозу-вання, суб'єкт ресторанного бізнесу, ринок ресторанних послуг, корпоративні мережі, партнерські мережі, франчайзингові мережі, бізнес-сценарії.

Introduction. Effective management of restaurant business entities determines their successful functioning due to the search for new and loyalty of customers, increasing the level of their service security, expanding part-nership business relations, introducing contactless service experience and digital technologies for the implementation of the product (service), the for-mation of loyalty programs in accordance with the individual needs of a particular segment of consumers (including disabled consumers). Manage-ment development of the restaurant business is problematically oriented; exo-genous and endogene factors influence the efficiency of restaurant business institutions. The COVID-19 pandemic had a negative impact on their functioning. The number of restaurant business establishments in Ukraine was reduced by 4,000 units, which is four times more than in 2019 [1].

The main constraining factor of the foresight of restaurant business establishments on the territory of Ukraine is the full-scale armed aggression of the russian federation, which provoked limited access to relevant official statistics and made it impossible to determine and analytically predict the current state of enterprises in the market.

Problem. The impact of external and internal factors of different hierarchical levels on the restaurant business requires innovative and adap-tive mechanisms of interaction with the subjects of economic relations, which are formed on the application of cognitive modeling in the identification and selection of scenario vectors for predicting their development.

Analysis of recent research and publications. There have been different publications in recent years examining management development of the restaurant business. Many studies have explored the theoretical aspects of the formation and development of the restaurant business (systematic analysis of all areas of theoretical, methodological and applied research, which include terminological apparatus; theoretical and methodological principles of management of the development of the restaurant business [2–4]; management of the business entity activity and the specifics of its functioning [5–12]; the use of the Internet and digital technologies in the management of enterprises in the market of restaurant services [14–16]), etc.

However, in the situation of russia's armed aggression, large-scale destruction of infrastructure and destabilization of the Ukrainian economy, the restaurant services market needs relevant scientific research and adaptive scenario forecasting of further directions of the functioning of restaurant business entities.

The aim of the article is the scientific substantiation of scenario vectors for forecasting the development of restaurant business establishments.

Methods. The theoretical basis of our work includes the scientific works of domestic and foreign authors related to various aspects of the formation, development, and management of enterprises (in the restaurant business); the ethological basis is a combination of statistical and graphic methods, which made it possible to analyze the dynamics of development and adaptability of the restaurant business establishments (including network) in the Ukrainian market. General scientific research methods such as analysis, synthesis, systematization and logical generalization, methods of logical and cognitive modeling were used to develop scenario vectors for forecasting the development of restaurant business establishments in conditions of doing business in Ukraine. The obtained results and conclusions are confirmed by static and marketing research.

Results. The closure of most establishments at the beginning of the coronavirus crisis, the unstable activities of the rest of the enterprises, caused a total restart of the restaurant business, including the management of marketing activities of enterprises. The reason for the closure of the establishments were disagreement with tenants (34 %), debts (19 %), change of the functioning format of the institution/network of establishments (19 %), reduced customer flow after the lockdown (17 %), a radical change of the field of activity (11 %) [17]. In addition to the above factors, it is advisable to single out other reasons for the impossibility of effective management of marketing activities of enterprises and the closure of a large number of restaurant business establishments. They include a limited work schedule during the lockdown, a dramatic decrease in consumer flow, unwillingness of existing establishments for new activity formats, unadapted to the current market conditions of marketing management of restaurant establishments, lack of appropriate response of public authorities and business support, high rental rates on the occupied area, inability to keep staff and pay for their work, etc.

The pandemic also had a negative impact on the size of restaurant revenues. *Poster,* the company for the automation of cafes, restaurants and shops, studied this aspect. It was found that after the resumption of work of restaurant business establishments, 54 % of the enterprises reduced the amount of revenue, 50 % of the establishments had a reduction in revenue by 30 % and more. In July, 2019, in comparison to the result of the same period in 2018, a decrease in the level of revenue recorded in 17 % of the establishments, in 6 % of the institutions was a decline by 30 % and more. In 2020, in comparison to the result of the same period in 2019, these figures were respectively 54 % and 28 %. On average, the revenue of restaurant business establishments in July 2019 compared to July 2018 increased by 46 % against an increase of 3 % from 2019 to 2020. That is, revenue growth slowed down more than 15 times [18]. In 2022 the driving factor in destabilizing the activities of domestic subjects of the restaurant business was the armed aggression of the russian federation on the territory of Ukraine, which provoked a temporary impossibility of their positive development due to the lack of adaptive scenarios for the further functioning of institutions in the conditions of active hostilities in the country.

To determine the scenario vectors of further development, it is advisable to analyze the *dynamics in the functioning* of restaurant business establishments in Ukraine for 10 years from 2010 to 2020 (*Figure 1*).
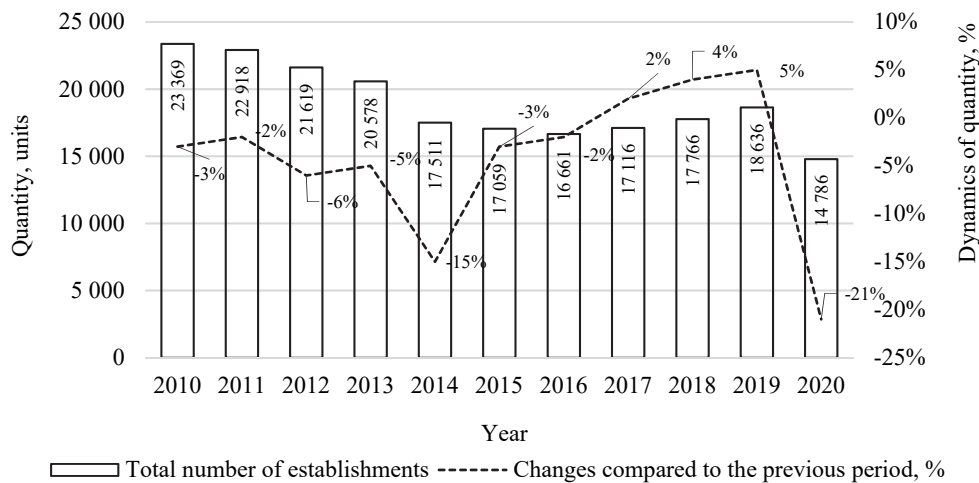

Figure 1. Dynamics of development of restaurants in Ukraine from 2010 to 2020

Source: developed by the authors on the basis of [19; 20].

Thus, from 2010 to 2020, the number of restaurant business entities decreased in the domestic market for the first time (in 2014) as a result of the beginning of russia's military and political aggression against Ukraine (annexation of the Autonomous Republic of Crimea, occupation of part of Luhansk and Donetsk regions). The restaurant business dynamically recovered due to the

growth in the number of establishments from 2017 to 2019. However, quarantine restrictions on the enterprises activities, as well as a significant reduction in foreign tourists in 2020 led to a sharp reduction in the establishments of this sphere. It was the largest decline in the number of establishments in the restaurant services market over ten years.

It is relevant to monitor the distribution of the number of restaurant business establishments (including chains) by region as of the beginning of 2021 (*Figure 2*).
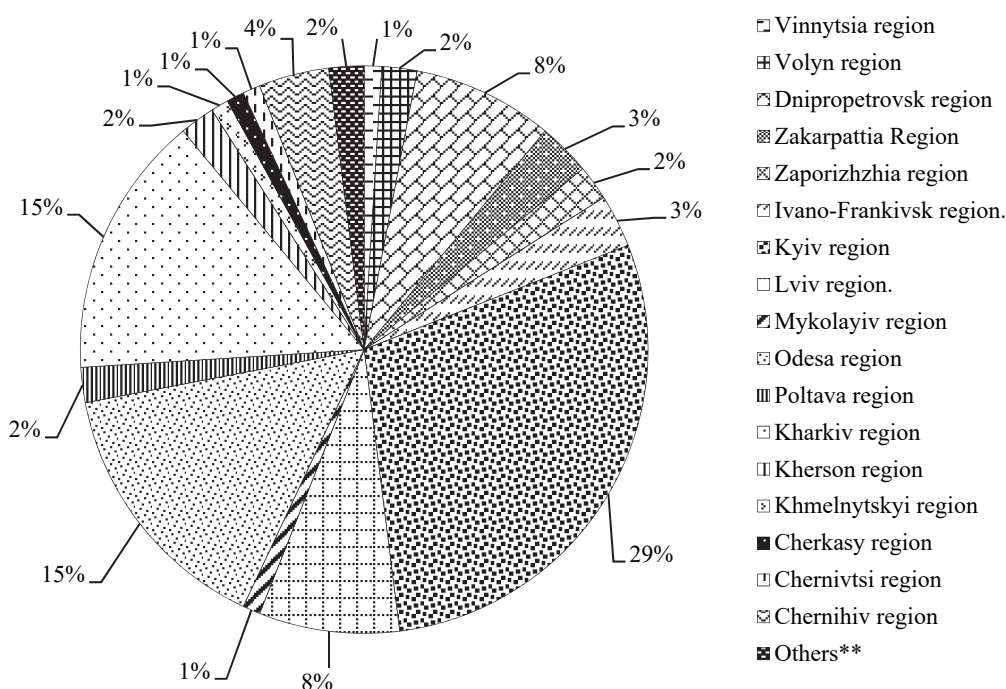

Figure 2. The structure of the regional distribution of the number of restaurant business establishments (including networks) in Ukraine as of the beginning of 2021*

*Data are given without taking into account the temporarily occupied territories of the Autonomous Republic of Crimea, the city of Sevastopol, Donetsk and Luhansk regions.
** Regions where the number of establishments is less than 1 %.

Source: developed by the authors on the basis of [19].

Based on the analysis of the data in *Figure 2,* the authors revealed the following trends in the *development* of the restaurant services market in Ukraine as of the beginning of 2021:

• 75 % of the entire restaurant market of Ukraine was concentrated in Kyiv, Odesa, Kharkiv, Dnipropetrovsk, and Lviv regions;

• the smallest number of enterprises was recorded in Volyn, Mykolaiv, Khmelnytskyi, Cherkasy, and Chernivtsi regions;

• Kyiv, Odesa and Kharkiv regions were the leaders in the concentration of a large number of restaurant business enterprises.

Based on the analysis of the data of the State Statistics Service of Ukraine, the authors analyzed the volume of services sold by service sector enterprises by type of economic activity in the first quarter of the first quarter in 2019–2021 (*Table*).

Table

The volume of services sold by service sector enterprises by type of economic activity in the first quarter from 2019 to 2021 *(in market prices)*

Type of economic activity	Realized services, UAH billion / % of the total volume					
	2019		2020		2021	
	total	including the population	total	including the population	total	including the population
Transport, warehousing, postal services and courier activity	96.45 / *44.8*	11.62 / *12.1*	92.83 / *41.0*	9.94 / *10.7*	93.39 / *39.3*	6.24 / *6.7*
Temporary accommodation and food organization, including:	6.98 / *3.2*	5.00 / *71.6*	5.36 / *2.4*	3.49 / *65.0*	5.51 / *2.3*	3.57 / *64.8*
Food and beverage activities:			3.65 / *1.6*	2.46 / *67.3*	4.04 / *1.7*	2.57 / *63.6*
- *activities of restaurants, provision of mobile catering services;*	–		2.64 / *1.2*	2.23 / *84.5*	2.66 / *1.1*	2.33 / *87.7*
- *delivery of ready meals;*			0.94 / *0.4*	0.18 / *18.8*	1.34 / *0.6*	0.20 / *14.9*
- *drinks service*			0.07 / *0.03*	0.05 / *73.7*	0.05 / *0*	0.04 / *85.5*
Information and telecommunications	38.72 / *18.0*	12.38 / *32.0*	41.41 / *18.2*	14.07 / *34.0*	47.28 / *20.0*	15.09 / *31.9*
Real estate transactions	21.42 / *9.9*	0.71 / *3.3*	23.27 / *10.3*	1.08 / *4.6*	24.73 / *10.4*	0.96 / *3.9*
Professional, scientific and technical activity	21.26 / *9.9*	0.80 / *3.7*	24.53 / *10.3*	0.97 / *3.9*	25.02 / *10.5*	0.92 / *3.7*
Activities in the field of administration and auxiliary service	16.59 / *7.7*	3.86 / *23.3*	17.26 / *7.6*	4.01 / *23.3*	18.86 / *7.9*	5.18 / *27.4*
Education	5.69 / *2.6*	5.33 / *93.8*	6.01 / *2.6*	5.63 / *93.7*	6.86 / *2.9*	6.40 / *93.3*
Health care and provision of social assistance	5.74 / *2.7*	4.45 / *77.5*	13.83 / *6.1*	12.15 / *87.8*	14.01 / *5.9*	10.71 / *76.5*
Arts, sports, entertainment and recreation	1.55 / *0.7*	1.00 / *64.6*	1.62 / *0.7*	0.81 / *50.1*	11.91 / *0.5*	0.61 / *51.5*
Provision of other types of services	0.80 / *0.4*	0.25 / *30.7*	0.86 / *0.4*	0.50 / *24.0*	0.90 / *0.4*	0.24 / *27.0*
Total	215.20	45.41 / *21.1*	226.97	52.35 / *23.1*	237.74	49.91 / *21.0*

Note: the data are provided without taking into account the temporarily occupied territories of the Autonomous Republic of Crimea, the city of Sevastopol, Donetsk and Luhansk regions.

Source: compiled by the authors based on [19].

According to the results of the analysis of the data in *Table*, the authors made the following conclusions (regarding the volume of services sold in the first quarter 2021):

• the total volume of services sold increased by 10.5 and 4.7 % compared to 2019 and 2020, due to their volume increase in the field of information and telecommunications, professional, scientific, administrative and technical activities, auxiliary services;

• the volume of services sold to the population is characterized by dynamic fluctuations in the analyzed period. In particular, in comparison to the result of the same period in 2019, there was an increase in the volume of services sold by 10 % due to a corresponding increase in their share in such types of economic activity as real estate transactions and activities in the field

of administrative and auxiliary services. At the same time, in 2021, there was a decline in the volume of services sold to the population in comparison to the result of the same period in 2019: (1) by 46.3 % (transport, warehousing, postal and courier activities); (2) by 28.6 % (temporary accommodation and catering (including activities to provide food and drinks); (3) health care and social assistance in 1.4 times; (4) by 38.6 % (arts, sports, entertainment, and recreation). Other economic activities had small changes.

Businesses provided services to the population over 4.7 % in 2020 than in comparison to the result of the same period in 2021. The decline in the final period is typical for almost all types of economic activity, including transport, warehousing, postal and courier activities (37.2 %); real estate transactions (11.3 %); professional, scientific and technical activities (4.8 %); health care and social assistance (11.8 %); arts, sports, entertainment and recreation (24. 6 %); other types of services (51.2 %);

• in comparison to the result of the same period in 2020, the volume of services for temporary accommodation and catering (including the population) increased due to a growth in their share in the following types of economic activity as restaurants, mobile food services by 3.2 % and beverage service by 11.8 %;

• popular consumers' services were education (93.3 %); health care and social assistance (76.5 %); 64.8 % accounted for temporary accommodation and catering (including restaurants, mobile food services, and beverage service); 51.5 % accounted for art, sports, entertainment, and recreation (the structure of the volume of services sold to the population by type of economic activity in the first quarter from 2019 to 2021 is presented in graphic form in *Figure 3*);

• the total volume of sold services to the population accounted for 21 % from the total volume of sold services, which was less than in 2019 by 0.1 % and by 2.1 % in comparison to the result of the same period in 2021.

Despite the negative impact of the pandemic, military and political instability in Ukraine on the development of the restaurant services market, there were also positive aspects: all these factors provoked a change in trends for the effective management of marketing activities of enterprises and establishments functioning in modern conditions in general, forced to look for innovative solutions in management and create new formats of activity, led to the emergence of an adaptive product (service) that meets the requirements of the consumer, identified market leaders who were ready to adapt to any realities of functioning and combined the efforts of stakeholders to restore and further develop the restaurant services market.

Association of networks of restaurant business establishments is a promising development direction which has a number of advantages compared to independent enterprises under unstable external conditions. At the same time, such development version has its drawbacks and risks of functioning (*Figure 3*).
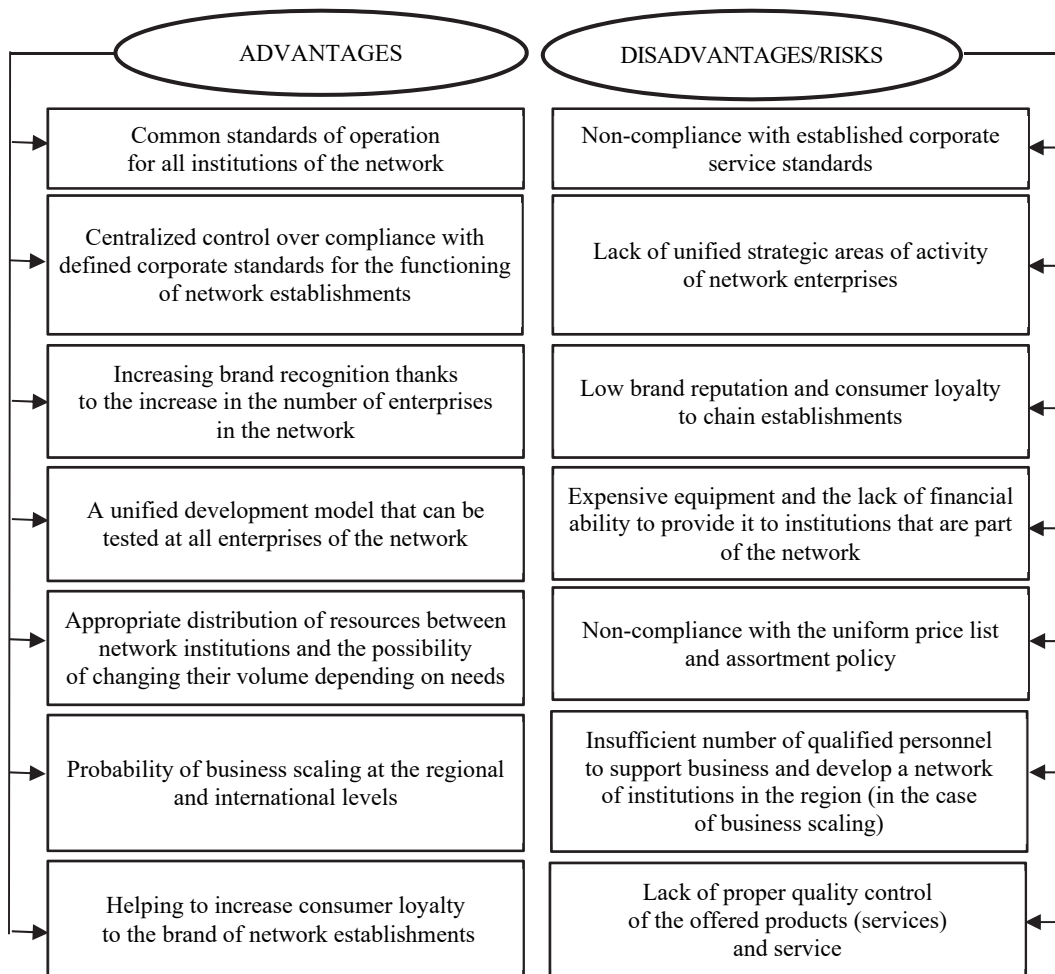
ADVANTAGES	DISADVANTAGES/RISKS
Common standards of operation for all institutions of the network	Non-compliance with established corporate service standards
Centralized control over compliance with defined corporate standards for the functioning of network establishments	Lack of unified strategic areas of activity of network enterprises
Increasing brand recognition thanks to the increase in the number of enterprises in the network	Low brand reputation and consumer loyalty to chain establishments
A unified development model that can be tested at all enterprises of the network	Expensive equipment and the lack of financial ability to provide it to institutions that are part of the network
Appropriate distribution of resources between network institutions and the possibility of changing their volume depending on needs	Non-compliance with the uniform price list and assortment policy
Probability of business scaling at the regional and international levels	Insufficient number of qualified personnel to support business and develop a network of institutions in the region (in the case of business scaling)
Helping to increase consumer loyalty to the brand of network establishments	Lack of proper quality control of the offered products (services) and service

Figure 3. Features of the restaurant chains functioning

Source: compiled by the authors.

The network of restaurant enterprises usually misses two or more objects and restaurants of the same format, which belong to the same owner or are under his control, provide the same type of services and dishes, have common centralized quality standards, a single business model, a common procurement service, architectural design and uniforms [21].

The modern network of restaurant business enterprises in the domestic market of services is characterized by a variety of formats of included establishments, and belonging to one or several owners. Thus, restaurants and chains, particularly in Ukraine, are developing in three main formats (*Figure 4*).

The most common direction of network development of enterprises in the market of restaurant services in Ukraine is their formation on the terms of *franchising*. Approximately half of all franchises of the world's online chains work in the field of trade and restaurant business, where the key place is given to fast food establishments, restaurants, industrial and food stores [22].
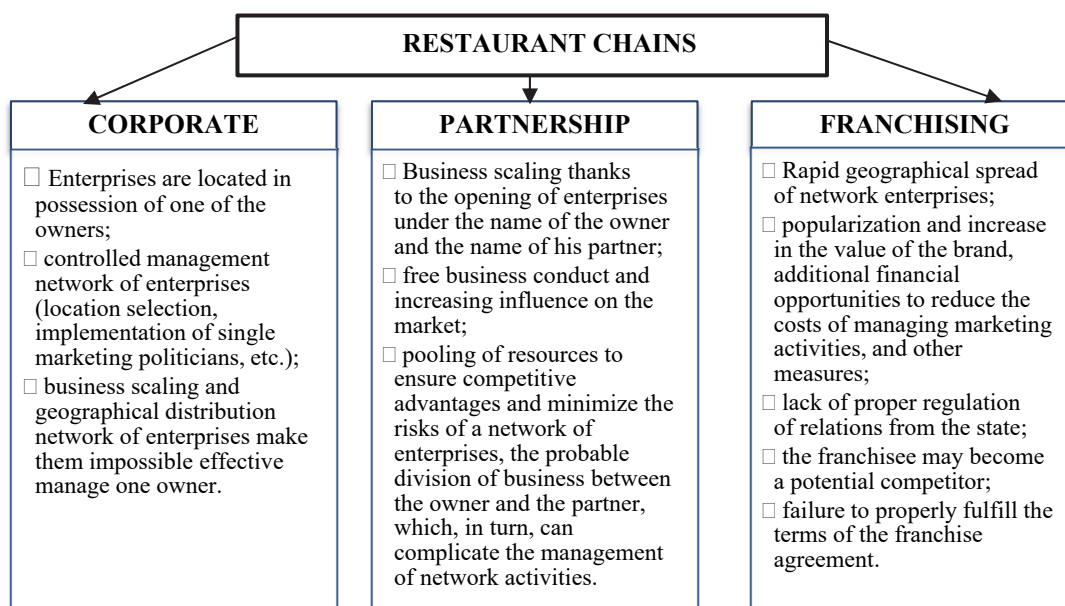
Figure 4. Formats for the development of restaurant chains

Source: compiled by the authors based on [23].

Based on a thorough analysis of the dynamics of the development of the number of restaurant establishments, we can calculate the share of own and franchised enterprises that form networks, in accordance with the total number of establishments from 2017 to 2020. The results of the calculations are presented in *Figure 5*.
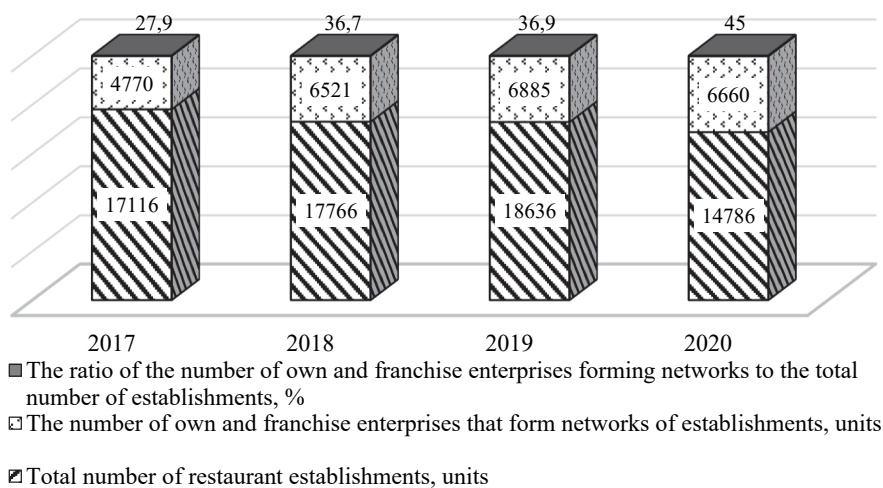

Figure 5. Development of national and franchise enterprises that form networks in their total number in the market of restaurant services of Ukraine from 2017 to 2020*

*Statistical data from 2021 to 2022 are not published to avoid misinformation of society in connection with military operations in Ukraine.

Source: calculated and compiled by the authors on the basis of [24].

Thus, from 2017 to 2019, a dynamic growth in the number of own and franchised enterprises that form networks in the domestic market of restaurant services and their share in the total number of establishments was recorded. Despite a sharp decrease in the total number of enterprises in 2020. Due to the consequences of the pandemic, the share of establishments ensuring the development of restaurant chains increased by 8.1 % in comparison to the result of the same period in the previous year. The obtained results indicate the popularization and dynamic development of a network of enterprises in the restaurant business.

It is advisable to consider in details the development of the restaurant services market in the international arena. According to the results of monitoring carried out by the German company *Statista*, which specializes in market and consumer data, it was determined that the global food services market reached a value of 2 334 billion USD in 2020, and from 2021 to 2026 its further growth is expected [25]. At the same time, it is necessary to take into account the factor of uncertainty and unpredictability of the impact of the COVID-19 pandemic and hostilities in the center of Europe on the general state of the market. In particular, withsocial distancing and general caution about staying in public places, most consumers have forced most consumers to visit restaurant establishments less. According to this source, the change in the number of visitors to restaurants around the world in 2021 accounted for 18 % in comparison to the result of the same period in 2019; however, in 2020 this figure decreased by 53.55 % in comparison to the result of the same period in 2019 [26]. With the increase in the number of visitors to restaurant business establishments, it was also observed in the post-pandemic period, in particular in 2022.

Based on the results of a detailed analysis in the restaurant services market, it was determined that chains with almost 30 % of restaurant services, showing a rapid growth rate compared to independent (own) establishments (*Figure 6*).
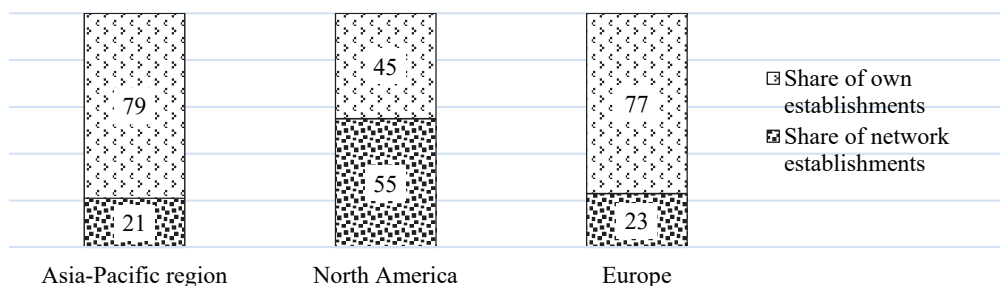

Figure 6. The ratio of the share of national and franchised enterprises in the world market of restaurant services from 2019 to 2020, %

Source: compiled by the authors based on [24].

According to the results of research conducted by the consalting and auditing company *Deloitte* for the period from 2014 to 2020, a dynamic growth in the number of network establishments in all represented regions was in Asia Pacific (+ 4.3 %), North America (+ 1.9 %), Europe (+ 3.1 %) [27]. This trend is relevant and maintains a dynamic growth rate.

Scenario forecasting of the development of restaurant business provides an opportunity to take into account both external and internal factors and justify business scenarios. Taking into account the results of the analytical report of the company *Deloitte* and the obtained research results on the development of the restaurant business, it is possible to determine the *scenario vectors (business scenarios) of forecasting the development of restaurant chains*, which determine the further effective management of enterprises in the market as a whole.

Business scenario 1: focus on consumer values and needs. Key aspects of this scenario are giving the consumer an advantage to the restaurant delivery service; updating and expanding the capabilities of digital platforms for making online orders; increasing the flexibility of customer relationships through service mobility. The consequences of the development of the proposed business scenario can be accelerating the exit of establishments into new markets, expanding knowledge about the needs of the end clients with the help of dynamic management systems; improving the quality of direct communication of enterprises through the media and innovative channels.

Business scenario 2: collaboration of restaurant business entities and related food companies. The key aspects include cooperation with potential business partners on contractual terms; acceleration of this exit of establishments into new markets; background short-term initiatives for long-term perspective. As a consequence for business, we determine the support of food service companies in the market; ensuring competitiveness; expansion of the range of restaurant products and services; opening of new forms of institutions; increasing consumer loyalty.

Business scenario 3: unification of formats and concepts of restaurant business entities. The key aspects of the proposed business scenario are combination of formats and concepts in one institution (restaurant shops, salon cafes, etc.); sales of restaurant business products through retail grocery stores to increase consumer traffic and increase their loyalty to the network. Predictable consequences for business due to the use of the proposed business scenario are diversification of business models of establishments functioning by placing products in places with high consumer traffic; development of innovative value proposals and formats that will meet the current behavior and requirements of consumers; expanding partnership.

Business scenario 4: restructuring business models of restaurant business entities that involves the introduction of alternative payment methods; investing funds for the organization of personnel trainings; confrontation of reducing businesses by increasing traffic and cross-sales and the average client's check. Consequences for business include improving the efficiency of staff functioning in laid; formation of innovative pricing models and payment conditions; development of current value proposals; formation of a new model of income from the activities of restaurant business establishments.

Business scenario 5: technological innovations for improving consumer safety involves introduction of new technological formats into the activities of enterprises under the influence of external factors for consumer

service (QR code for ordering restaurant products, contactless payments, etc.); successful functioning of *dark kitchen* format institutions to reduce staff and premises. Consequences for business include stimulating and active use of digital innovation in the activities of restaurant business entities; maximizing contactless service; reducing staff and premises.

Business scenario 6: omnichannel marketing communication involves a long-term transition from the consumption of restaurant products in the establishment to "home" consumption; search for new sources of income generation of restaurant business establishments. The consequences for business are determined by the differentiation of offers in the market of restaurant services, the formation of new channels of communication with consumers, the development of programs to attract consumers to target new segments, an increase in consumer flow through the formation and implementation of appropriate loyalty programs.

We define the concept of "*business scenarios*" as adaptive tools of practical significance, which determine the promising directions of activity of enterprises in various spheres of economic activity in accordance with the current conditions of market functioning, taking into account external and internal factors.

Conclusions. The results of the analysis of the dynamics of the development of the restaurant services market, the structure of the regional distribution of the number of restaurant business establishments (including networks), the volume of services sold by enterprises of various types of economic activity in Ukraine indicate the prospects for further development of the market as a whole, taking into account the implementation of the proposed scenario vectors for forecasting the development of restaurant business establishments. At the same time, this issue is debatable, because the main constraining factor to further assessment of the state of restaurant business enterprises is a full-scale armed aggression of the russian federation on the territory of the country, which provokes temporarily limited access to relevant official statistics, makes it impossible to foresight restaurant enterprises due to the uncertainty of their further condition.

Under the optimistic scenario, the economy and the social level of the population of Ukraine and the attractiveness of the main tourist regions will increase, which indicates the relevance, prospects, and expediency of using certain scenario forecasting vectors in the management of restaurant business establishments.

Based on the above-mentioned, the prospects for further research involve the definition of conceptual approaches to the management of restaurant business institutions, taking into account the implementation of the developed scenario vectors of forecasting in modern conditions of doing business in Ukraine.

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