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Socio-Cultural Contradictions in the Development of the Regional Restaurant Services Consumer Market in Ukraine

Abstract. *Introduction.* The article explores the sociocultural contradictions accompanying the development of the consumer market of regional restaurant services in Ukraine. *The purpose of the research* is to identify the specific features shaping the consumption market of restaurant services across Ukrainian regions and to outline the key social and cultural contradictions that influence the formation of the typical consumer. The study employed general scientific *methods* of cognition: analysis, synthesis, generalisation, comparison, observation and a systems approach. *The results* demonstrate that conflicting interactions between rising consumer expectations, limited economic capabilities of businesses, and the realities of the cultural environment mark the development of the regional restaurant market. Emphasis is placed on the fact that the modern consumer seeks high-quality gastronomy and emotionally engaging cultural leisure that includes service, atmosphere, and personalised communication. In response to these shifts, there is an increasing demand for highly skilled staff capable of delivering the expected level of interaction. However, there is a noted shortage of trained professionals who can effectively operate under the communicative and psychological pressures of the restaurant industry. One of the critical sociocultural contradictions is the conflict between the drive to fully satisfy the customer and the need to maintain decent working conditions for staff. Excessive customer orientation, which often borders on indulging toxic behaviour, leads to a deterioration of the moral and psychological climate in teams, increased employee burnout, and disruptions in internal communication ethics. The study also examines the impact of the commercialisation of consumer relations on the expectations for individualised services, particularly in

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the context of dietary restrictions, ethical stances, and healthy lifestyles, which are not always compatible with the capabilities of a typical restaurant operation. *Conclusions.* Restaurateurs are forced to strike a balance between economic feasibility, cultural relevance, and the expectations of a new type of consumer – one who is informed, emotionally engaged, but often financially constrained. The practical value of the study lies in identifying problematic areas of sociocultural interaction within the restaurant industry, which may serve as a foundation for developing more effective management strategies in the hospitality sector.

Keywords: restaurant services, consumer, contradictions, culture, region

1. Introduction

The problem formulation. In the third year of a full-scale war, the Ukrainian regional restaurant services market is unstable. The initial sharp decline in activity in 2022, caused by security risks, disruption of supply chains, evacuation of the population and reduced purchasing power, was gradually replaced by a phase of partial recovery in 2023-2024. Despite these positive developments, the overall level of household income remains insufficient for the restaurant segment to grow actively, leading to cautious consumption and the prevalence of frugal behaviour. At the same time, the market is witnessing new qualitative trends, including the intensification of national restaurateurs focused on local products, creative formats, cultural authenticity and highly specialised gastronomic offer. The nature of demand is also changing: modern consumers are increasingly seeking not only to satisfy their basic nutritional needs, but also to gain aesthetic, social and symbolic experience. This indicates the formation of a new model of gastronomic interaction that combines economic adaptability with cultural enrichment.

Analysis of the state of the art of the problem. The issue of socio-cultural contradictions in developing the consumer market for regional restaurant services in Ukraine is not sufficiently covered in the scientific literature, as the vast majority of sources are online analytical or journalistic publications. There is a lack of academic research on this topic in the Ukrainian scientific discourse. At the same time, the topic is partially covered in a foreign scientific article by L.C. Ueltschy, M. Laroche, A. Eggert and U. Bindl (Ueltschy et al., 2007), which analyses the relationship between service quality, customer satisfaction and price in the field of professional services. At the same time, some authors provide important empirical information on changes in consumer behaviour in their publications. In particular, Pro-Consulting (2024a) highlights the dynamics of the average cheque

growth in the context of changed purchasing power. T. Antoniuk (2025) records a decrease in attendance against the background of revenue growth, which indicates an adaptive market strategy. O. Zviahintseva (2025) emphasises the crisis points of the restaurant industry in Ukraine in 2025, suggesting areas of adaptation. V. Polishchuk raises the issue of the price balance between cost and consumer perception (Centre for Economic Strategy, 2025). In a non-academic, but practically oriented format, blog materials (Tkachenko, 2017) help to understand customers' motivational aspects in the food field.

The study also used expert literature – publications in modern online media, particularly pro-consulting.ua, forbes.ua, hub.kyivstar.ua, joinposter.com, feedbackhunter.net, etc. These sources made it possible to recreate the current state of the restaurant business in Ukraine, including regional peculiarities and consumer sentiment.

Unresolved issues. Despite the availability of an information base, there is a lack of a systematic scientific approach to analysing socio-cultural contradictions in regional restaurant services. That is why, using various methods of scientific knowledge, the information was analysed, aggregated, systematised and presented in the light of the research topic.

2. Purpose and methods

The purpose and research tasks. The purpose of the article is to highlight the peculiarities of the formation of the consumer market for regional restaurant services and to identify key social and cultural contradictions in the formation of a typical consumer. To achieve this goal, the following tasks are envisaged:

- to characterise the current state of the regional restaurant services market in the context of a full-scale war in Ukraine;
- to identify changes in the structure of demand, consumer typology and motivational behaviour patterns;
- to analyse the socio-cultural expectations of consumers and identify tension points between consumer demand and market opportunities;
- to systematise the main contradictions in the interaction between the consumer, staff and restaurateur in the context of changes in gastronomic culture.

Methodology and methods. The theoretical and methodological basis of the study is an interdisciplinary approach that combines sociological, cultural, economic and analytical approaches to the study of gastronomic consumption as a social phenomenon. The methodology is based on the concepts of social

constructionism, the theory of everyday practices and cultural identity, which allows us to consider a restaurant as a service sector and a space of social interaction and symbolic capital.

A number of complementary methods have been used to achieve the set objectives. In particular, the method of system analysis was used to describe market dynamics comprehensively; content analysis was used to interpret media and social messages about gastronomic behaviour; comparative historical method was used to analyse changes in consumer typology in the pre-war and war periods; and elements of socio-cultural modelling were used to reconstruct the image of a typical consumer in a regional urban environment.

Information base. The research was informed by official analytical reports of the Centre for Economic Strategy (2025), statistics on the dynamics of revenue, attendance and consumer traffic in the Ukrainian catering industry in 2021-2024 (Pro-Consulting, 2024a; Antoniuk, 2025), the results of marketing research by FeedbackHunter (*Chomu kliienty*, n.d.), as well as relevant publications in professional industry media and analytical platforms.

3. Results and discussion

Summary of the main material. Visiting restaurant business establishments plays a multifunctional socio-cultural role beyond basic nutritional needs. Among the leading consumer motivations are: the desire for physiological satiety, socialisation, establishing interpersonal relationships (in particular in the context of romantic encounters), recreation and entertainment, aesthetic and cultural pleasure, as well as self-presentation and raising social status (Tkachenko, 2017).

In 2024, the food service market in Ukraine showed a general trend towards a moderate decline, which is reflected, in particular, in the decline in attendance rates for most types of establishments.

The most significant drop in traffic was recorded in pizzerias, fast food, and restaurants, at 8% and 7% respectively, which may indicate both an increase in consumer price sensitivity and a change in their priorities for leisure formats. Traffic in coffee-to-go outlets remained unchanged, which may indicate that this format is highly adaptable to the current conditions of a mobile urban lifestyle. The decline in visits to food outlets in 2024 was primarily driven by a decline in the population's purchasing power, which resulted from inflationary pressures and the general economic slowdown. With limited resources, consumers increasingly prioritise basic needs and reduce out-of-home meal spending (Antoniuk, 2025).

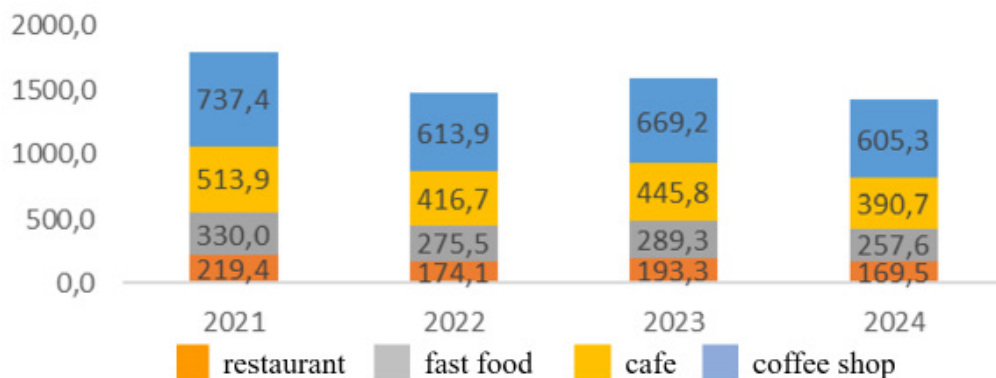


Figure 1. The number of visitors to restaurant establishments is expected to be a million people in 2021–2024. Source: systematised based on (Pro-Consulting, 2024a)

The structure of the Ukrainian restaurant business in 2023 showed uneven revenue growth depending on the type of establishment. The highest growth rates were demonstrated by sushi restaurants, with revenue up 16%, indicating a steady increase in demand for Asian cuisine and the compliance of this format with modern consumer expectations. Coffee shops took the second position in terms of revenue dynamics: the average revenue growth in this segment was 14%. In comparison, the average check increased by 15%, which may indicate an increase in the value of coffee shops as a space for socialising and leisure. Moderate revenue growth of 10% was also seen in bakeries, general restaurants, pizzerias and bars. The smallest increase was recorded in the fast-food segment: revenue grew by only 4%, although the average check increased by 13%, which is likely to be a result of the inflationary factor rather than a real increase in consumer demand (*HoReCaMaster Hub 2025, 2025*).

According to the Centre for Economic Strategy (2025), the volume of the restaurant services market in Ukraine was UAH 31.6 billion in 2023. It is important to emphasise that this is the officially declared part of the market, the so-called ‘white’ segment, as it is the one that is taken into account in the GDP calculation.

An analysis of the revenue structure shows a high concentration of the market: almost half (49%) of the total net revenue of the industry is generated by only two transnational chains – McDonald's and KFC (represented through several franchises). McDonald's stands out, with net revenues of around UAH 13 billion, which is significantly higher than those of other market players. The most widespread other fast-food chains are Lviv Croissants, Fest!, Gastrofamily, etc. (Fig. 2)

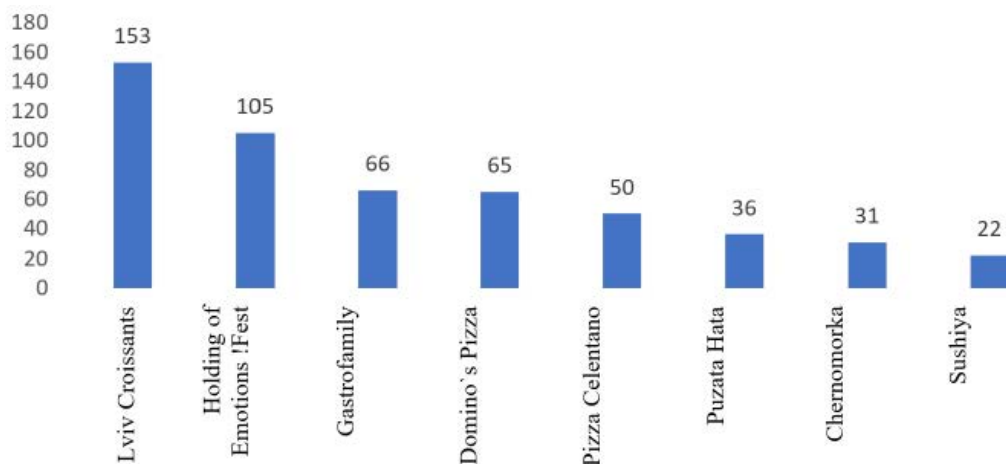


Figure 2. The largest restaurant chains by number of restaurants in 2023
 Source: systematised based on the source (Tkachenko, 2017)

Despite being positioned as a restaurant, McDonald's essentially operates as a 'food factory', where the main task is to mass-produce a high-calorie product with minimal time spent by the consumer. The economic structure, financial model, and types of services provided in such establishments differ from the classical hospitality paradigm, where the primary focus is on an individual approach, service, and cultural component of food consumption.

These dynamics shape a specific image of the domestic consumer of restaurant services: the demand for fast, affordable and energy-dense food combined with a positive emotional experience dominates. Thus, despite the variety of offers on the market, most consumers are focused on the fast-food format, significantly affecting the industry's further development and its participants' strategies (Centre for Economic Strategy, 2025).

It should be noted that in recent years, the Ukrainian regional restaurant market has seen a distinct trend towards forming a new segmentation, particularly the emergence and active development of so-called 'city cafes'. This format of establishments is characterised by higher price positioning, focus on young, creative and quality-conscious audiences, and the provision of services that combine gastronomic innovations and modern cultural consumption codes. This segment includes the so-called 'hipster' coffee shops, the author's restaurants, and establishments with conceptual menus that tend to be experimental. Typical characteristics of such establishments are creativity in serving dishes, reference to exotic culinary traditions (in particular, Asian, Latin American,

etc.), as well as the reconceptualisation of Ukrainian cuisine – a departure from its traditional presentation in favour of new approaches, interpretations and fusion solutions (Centre for Economic Strategy, 2025).

The development of this segment was particularly intense in 2019, particularly in Lviv, which became an epicentre of the experimental restaurant movement. During this period, most of the city's restaurant establishments actively reoriented their services to an audience interested in intellectual, aesthetic, and culturally oriented gastronomic experiences (Centre for Economic Strategy, 2025).

In 2023-2025, a qualitative change in the demand structure was observed. In large cities, including Lviv and Kyiv, and several regional centres, such as Khmelnytskyi, Ivano-Frankivsk, and others, there was a massive opening of new food outlets with medium and above-average price positioning. According to preliminary estimates, hundreds of new facilities are in this segment. These trends indicate a gradual recovery of the solvent middle class, ready to invest in a higher quality and more sophisticated gastronomic offer.

A new image of the consumer is emerging: people with relatively stable incomes who cannot only satisfy their basic need for food, but also consider a restaurant as an element of their everyday or festive leisure. Within this model, restaurant spending often takes on a priority status in the consumer hierarchy, outstripping other entertainment or cultural activities (Centre for Economic Strategy, 2025).

One of the key trends in recent years is the spatial decentralisation of the restaurant business. Given the changing patterns of consumer mobility and the growing demand for accessibility, more and more restaurateurs are locating their establishments in the residential areas of large cities, i.e. in close proximity to the places where potential customers live. This process contributes not only to the diversification of supply but also to the increase in the gastronomic density of the urban environment, enhancing its internal cultural mobility (Centre for Economic Strategy, 2025).

Statistics also confirm the importance of this sector of the restaurant business. Analysing the current economic trends in the restaurant business in Ukraine, it should be noted that in 2024, the average bill increased by 18%. This figure indicates a significant shift in the consumer behaviour of Ukrainians in relation to catering services. On the one hand, this growth directly results from systemic inflationary processes under martial law, disrupted supply chains, and rising energy and raw material costs. However, on the other hand, the increase in the average check cannot be interpreted solely as an inflationary phenomenon. The market pattern of cost growth is also important, reflecting the growing

demand for traditional restaurant services. The modern consumer demonstrates a higher willingness to spend money on out-of-home dining, which is associated with lifestyle changes and a reorientation of the leisure structure (Pro-Consulting, 2024a).

Expert research based on surveys of restaurateurs allows us to identify key consumer market features and define typical restaurant industry consumers.

Table 1 – Socio-cultural aspects of the formation of the consumer market of regional restaurant services in Ukraine

Type of customer	Characteristics	Behavioural attributes
Interesting	Focused on trends, novelty, ‘Instagram effect’	Visit fashionable establishments, ordering special menus, and not being loyal.
Gourmets	Highly gastronomically educated, appreciate authenticity and quality	Ask questions, are interested in details, and can write a review
Bored	Visits are not for food, but for convenience or habit	Passive, indifferent to the concept, need entertainment
Those who ‘just want to eat’	Oriented to simple, clear, fast food	Choose soup, cutlet, ‘offer of the day’, and do not accept innovations

Note: systematised based on the source (Tkachenko, 2017)

According to the study of Loshakova N., the current features of consumer development in the regional restaurant business are increased emotional sensitivity, expectations of a high level of service regardless of the format of the establishment, as well as a shift in emphasis from the gastronomic function to the function of social experience. Visitors come to establishments not only to eat, but also for the atmosphere, comfort, communication, and positive impressions (Loshakova, 2023). Against this backdrop, key socio-cultural contradictions in developing the consumer market are revealed.

– First, there is an imbalance between the growing expectations of guests and the professional training of staff, especially in the context of emotional or aggressive consumption.

– Secondly, the expanding perception of the customer as ‘always right’ conflicts with the need for staff protection and decent working conditions.

– Thirdly, the commercialisation of customer focus creates the risk of tolerating toxic behaviour to maintain loyalty, undermining the internal integrity of communications in the institution. This requires professional skills and clearly structured behavioural algorithms that reduce tension and promote stability in the service sector (Loshakova, 2023).

Based on a study by FeedbackHunter (*Chomu kliienty*, n.d.), it was found that the main reasons why customers do not return to restaurant establishments are poor service, mismatch of expectations regarding food, overpriced food, inconvenient location or uncomfortable atmosphere, as well as lack of menu updates, feedback and personalised communication. According to research (Pro-Consulting, 2024b), the largest share of dissatisfied customers is in Kyiv and Dnipro (Fig. 3).

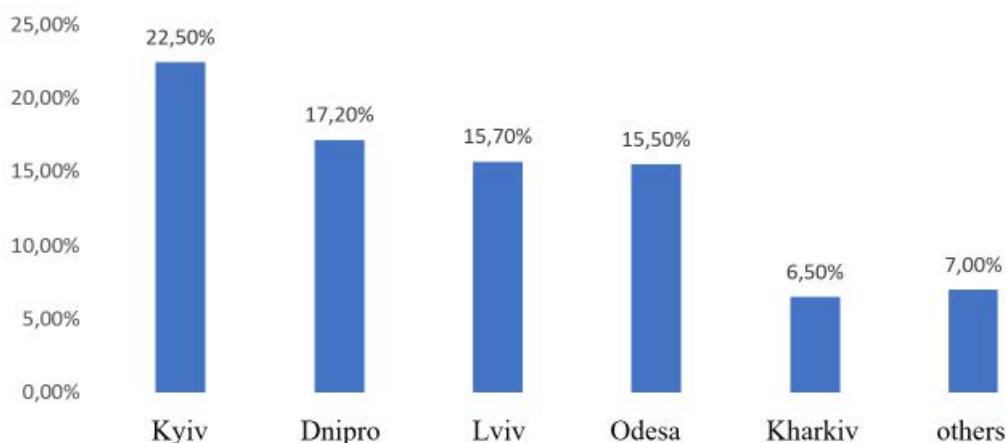


Figure 3. Share of customers dissatisfied with the quality of service in Ukrainian restaurants as of 2023

Source: systematised based on the source (Pro-Consulting, 2024b)

The socio-cultural characteristics of the modern consumer include a demand for transparency, authenticity and healthy eating. Customers are increasingly expecting open interaction with the kitchen, honest information about the origin of products, and menus that take into account dietary restrictions. Thus, the restaurant business is increasingly functioning as an element of the city's cultural infrastructure, combining gastronomic experience, digital services and the values of a new urban consumer ethic (Zviahintseva, 2025).

In terms of future trends in the consumer market, in 2025, this market will undergo qualitative changes under the influence of digitalisation, personalisation of services and growing cultural expectations of customers. Key trends include the

active use of artificial intelligence technologies, cloud services, Big Data analytics and geo-analytics, which allow for efficient management of operational processes, creation of targeted offers and selection of optimal locations for business development. Delivery formats, cloud kitchens, and conceptually narrow establishments with local or mono-product menus are growing in popularity (Zviahintseva, 2025).

4. Conclusions

Conclusions. The development of the consumer market of regional restaurant services in Ukraine is accompanied by several socio-cultural contradictions that reflect the complex dynamics of interaction between consumer expectations, economic reality and business opportunities. One of the key contradictions is the imbalance between the growing demand for emotionally rich gastronomic experiences and limited resources on the part of both consumers and establishments. Consumers are increasingly treating restaurant visits as an element of cultural leisure, expecting not only quality food but also service, atmosphere, communication and a personalised approach. In response, a growing need for highly qualified staff capable of working with emotionally sensitive and demanding guests. However, the human resources are often insufficiently prepared to work under increasing pressure and complex communication challenges.

Another contradiction lies in the opposition between the perception of the customer as 'always right' and the need to protect the labour rights of staff. Excessive customer focus, which has become the norm in the service sector, sometimes transforms into tolerance of destructive consumer behaviour, leading to the erosion of the internal communication culture of the institution and employee burnout. In addition, commercialising consumer relations creates expectations of flexible individualisation, particularly in the context of dietary restrictions, ethical preferences and healthy lifestyles, which often contradict the capabilities of mass restaurant production. This creates a complex field of socio-cultural interactions, within which restaurateurs must balance economic expediency, cultural relevance, and the expectations of a new type of consumer – one who is informed, emotionally engaged, and economically constrained.

The scientific novelty. The scientific novelty of the study lies in the systematic analysis of socio-cultural contradictions formed at the intersection of new models of gastronomic consumption and the structural constraints of the wartime period in Ukraine.

The significance of the study. The study's practical significance lies in the possibility of using the findings in developing strategies for adapting and de-

veloping the local restaurant business in the context of economic instability and changing demand structure.

Prospects for further research. In future research, it is advisable to deepen the analysis of the impact of military experience on the transformation of gastronomic culture, including the mechanisms of psychological adaptation of consumers through food practices. A promising area is the study of regional differentiation of consumer patterns in different regions of Ukraine, particularly in the frontline areas, as well as the analysis of the role of digital services and personalised communication algorithms in building brand loyalty.

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