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ASPECTS OF BUSINESS PLANNING OF ENTREPRENEURIAL ACTIVITIES OF ENTERPRISES IN THE TOURISM INDUSTRY AND HOTEL AND RESTAURANT BUSINESS

The article examines competition in the hotel and restaurant business market in Ukraine. Conceptual foundations for business planning are developed using the example of enterprises in the tourism and hotel and restaurant business, applying the principles of a systematic approach.

Business planning allows for growth in market share in certain segments. The activities of enterprises in the tourism and hotel and restaurant business are influenced by current trends: the impact of war, increased competition for consumers, established market shares, and limited resources. It is shown how the selection of market segments necessary to ensure the development of the range and assortment of services influences the formation of appropriate business planning tactics and strategies.

The trends in the restaurant business in Lviv are analyzed. The main trends in the functioning of catering establishments are identified. The characteristics of current changes in the market are formed. Approaches to consumer segmentation as a stage of business planning are shown. The main criteria for market segmentation are the demographic and economic characteristics of individual consumer groups. This study focuses on the most important personal characteristics: gender, age, marital status, occupation, and average monthly income per family member.

It has been determined that the age structure of visitors is very diverse. The middle and older generations prefer restaurants. The impact of the average monthly income of an average individual on their demand for restaurant products and services is assessed by the elasticity coefficient. It has been established that the mass visitation of catering establishments by entrepreneurs is influenced by their high purchasing power and the purpose of their visit – business meetings and corporate events. The need to foresee in business plans activities

not only in product policy, but also in creating favorable conditions for spending time has been identified.

Keywords: business planning; entrepreneurial activity; competition; consumer characteristics; market segmentation; trends in the development of the tourism industry and the hotel and restaurant business.

Relevance of the topic. A distinctive feature of business planning in the restaurant business is the special attention paid to the competitiveness of the establishment's products and services. The competitiveness of any restaurant establishment is determined by consumer response to its products and services. Therefore, it is essential to identify the end consumer in order to determine the factors that influence the demand for restaurant products and services, with priority given to demographic and economic characteristics and the identification of consumer needs and tastes.

People choose how to satisfy their nutritional needs based on their own preferences and the possibilities for fulfilling them. To encourage people to choose a restaurant, i.e., to actually influence demand, it is necessary to clearly understand which factors are decisive in this regard, as well as which changes within the establishment will yield the most positive results. Thus, it is important for any restaurant business to develop a business plan for operating in the market that is focused on the needs of its consumers.

Analysis of recent studies and publications. Theoretical, methodological, and applied issues of entrepreneurial development, which are already recognized as the basic tenets of market research, are discussed in the scientific works of foreign scholars A. Smith, D. Ricardo, F. Edgeworth, J. Robinson, S. Brew, J. Keynes, C. McConnell, J. Mill, F. Knight, M. Porter, and P. Hayne.

The conceptual foundations of a systematic approach to business planning, using the example of enterprises in the tourism and hotel and restaurant business, are formulated in the work of Chepurda L. et al. [1]. Some studies on the development of entrepreneurship have been conducted based on the characteristics of Ukraine's historical and cultural heritage [2]. Currently, studies that take into account the impact of war on the tourism and hotel and restaurant industries are relevant [3; 4; 5; 6].

The works of these scientists cover most of the problematic issues of business planning in enterprises, but at the same time, changes in the

economic environment require further relevant scientific developments. Of particular relevance is the need to develop approaches to ensuring a high level of competitiveness of individual enterprises in the hotel and restaurant business, to study the factors that shape it, and to determine strategies for further development.

Problem statement. The ability to maintain and develop the competitiveness of services is of significant importance for the effective operation of enterprises in the tourism industry and the hotel and restaurant business. This provides an opportunity to increase market shares in certain segments. Given the intensifying competition between companies in the hotel and restaurant services market for consumers, market share, and limited resources, it is important to select the necessary range and assortment of services, market segments, and to develop appropriate tactics and strategies for business planning.

The purpose of the article is to study existing segments in the restaurant services market, which is the basis for business planning of entrepreneurial activities of enterprises in the tourism industry and the hotel and restaurant business.

Presentation of the main material. After a decline in 2022, the restaurant business is now showing signs of recovery and growth. The segment's net income in 2023 amounted to UAH 31.6 billion, which is 1.82 times more than in 2022 (UAH 17.3 billion). In 2024, according to the OpenDataBot index, the total revenue of the top ten restaurants and hotels grew by 10% to UAH 28.22 billion. It is worth noting that the total net revenue in 2023 exceeded even the figures before the full-scale invasion: the increase from 2021 to 2023 was 26% (UAH 25 billion).

The restaurant market in Lviv has adapted to the conditions of operating during the war. In general, the restaurant market in Lviv has been affected by the difficult economic situation caused by increased rental costs and a decline in the number of foreign tourists, which has significantly reduced the income of local restaurants and the city budget. The market has become more flexible, with many players from other Ukrainian cities entering the market. Most of the new establishments are the result of relocation or geographical diversification of businesses by restaurateurs from other cities—Kharkiv, Kyiv, Odesa, Mariupol, Sumy, Kherson, and Mykolaiv. However, there is also a negative trend, as evidenced by the closure of a number of establishments that had been operating in Lviv for over 10 years.

Among the main trends in the functioning of catering establishments in Lviv, the following can be highlighted: – Use of local products; – Reduction of space; – Food halls; – Expansion of establishments in residential areas; – Reconception and revitalization of establishments.

The risks faced by catering establishments in Lviv, as well as throughout Ukraine (7), include the following: – Logistics problems; – No short-term prospects for the curfew to be lifted; – Decrease in average check size; – Security issues; – Increased competition; – Rising inflation and food costs; – Rising utility bills.

From a scientific and practical point of view, an in-depth study of the restaurant industry market requires that it be considered as a differentiated structure depending on the consumer group and consumer properties of the products (services) of restaurant establishments. The contingent of restaurant consumers can be divided into groups according to various characteristics: age, gender, place of residence, income level, frequency of visits, purpose of visits, taste preferences, etc.

The initial information base for analyzing the formation of demand for products and services was provided by research materials on the needs of restaurant consumers in Lviv. The information was collected in April-May 2025 by surveying visitors to 30 mid-range restaurants. The establishments in the selected segment operate in approximately the same economic, legal, climatic, and socio-economic conditions, which makes it possible to objectively assess the degree of influence of a particular factor.

The main criteria for market segmentation are the demographic and economic characteristics of individual consumer groups. In our research, we focused on the most important personal characteristics: gender, age, marital status, occupation, and average monthly income per family member. A questionnaire survey of 984 restaurant visitors in Lviv showed that women use restaurant services more often than men, although the difference is insignificant (Table 1).

Table 1

Grouping of restaurant visitors in Lviv, %

Socio-demographic characteristics of consumers		Structure, %	Socio-demographic characteristics		Structure, %	
Gender	Women	54,1	Occupation	Employee	13,2	
	Men	45,9		Civil servant	25,2	
Age, years	under 18	0,5		Entrepreneur	48,7	
	18–29	15,5		Military	9,7	
	30–40	31,8		Unemployed	0	
	41–50	16,7		Pensioner	0,7	
	50–60	18,3		Student	1,8	
	over 60	17,2		Pupil	0,7	
Marital status	Married	51,7		Average monthly family income per person, UAH	до 10000	1,2
	Unmarried	48,3			10000–20000	4,1
Number of persons in the family	1	14,2	20000–30000		21,5	
	2	25,4	30000–50000		34,6	
	3	32,1	50000–70000		20,5	
	4	18,8	more than 70000		18,1	
	5	7,9				
	more than 5	1,6				

The age structure of visitors is very diverse, but, as the study found, the middle and older generations (30-50 years old) prefer restaurants (80% of respondents). The latter can be explained not only by age-related changes in tastes and requirements for restaurant services, but also by the fact that with age, people acquire a more stable financial situation.

Marital status is not a factor that shapes demand in the restaurant business in the selected market segment.

An increase in family size to five or more people has a negative impact on the demand for restaurant services. In this regard, we can agree with some economists who believe that the increase in demand for products and services of publicly accessible catering establishments, especially in large cities, is associated with a decrease in family size.

As shown in the table, representatives of the «Entrepreneur» group are currently the most frequent visitors to restaurants. They account for almost half of restaurant consumers. The mass visits by entrepreneurs

to establishments such as restaurants are influenced by their high purchasing power and the purpose of their visits – business meetings and corporate events.

The analysis shows that the biggest limiting factor in shaping consumer demand for restaurant products and services among different social groups is the level of income, which was determined by the average monthly income per family member, UAH/month. People with an income of up to 30,000 UAH make up less than a third of visitors to restaurants in Lviv. The share of consumers with an income of over 70,000 UAH is quite significant, which makes business planning in premium class catering establishments relevant.

As we have already established, the sphere of activity determines to a certain extent the level of income of individuals, which in turn directly affects the formation of their demand for restaurant services. The study showed that the average Ukrainian, whose average monthly income does not exceed 20,000 UAH, practically does not visit restaurants.

The impact of the average monthly income of an average individual on their demand for restaurant products and services is assessed by the elasticity coefficient. According to our data, we can state that a 1% increase in the income of restaurant consumers causes a 1.53% increase in the cost of purchases.

Therefore, the volume and quality of the restaurant industry's offerings significantly depend on the size of their main source of profit – consumer income.

According to the survey data, the socio-demographic and economic characteristics of the consumer contingent have a direct impact on the purpose of the visit. Almost one in five visits a restaurant for a business meeting, with preference given to establishments located in the city center or on the main thoroughfare, where the concentration of business centers is highest (Table 2).

Table 2

Purpose of restaurant visits by consumers, %

Purpose of visit	restaurant location		
	in the center	on the highway	in a residential area
Nutritional needs	27.2	27.8	28.3
Recreation	44.2	45.2	44.6
Business meeting	20.4	19	7.5
Festive event	8.2	8	19.6

In modern conditions, we must acknowledge the creation of a new philosophy in consumer behavior – less and less often, the main reason for visiting restaurants is to satisfy one's own nutritional needs. In today's world, catering services are often associated with recreation, leisure, festive events, and business meetings. This trend indicates that restaurants will need to improve not only their product policy but also the conditions for spending time at their establishments. Increased competition brings the quality parameters of a restaurant's activities to the forefront.

Conclusions. Segmentation of the consumer contingent has shown that restaurants mainly focus on consumers with above-average and high incomes in their economic activities, which is reflected in the pricing policy of the establishment. Already during the creation and, subsequently, during the practical activities of a restaurant establishment, its management usually identifies one to three main target consumer segments, whose needs it tries to satisfy in the course of its production program. Therefore, the organization of the process of studying the needs of these consumer segments is relevant throughout the entire life cycle of a strategic business unit. Obviously, demographic and economic characteristics, location, and type of restaurant establishment are not the only limiting factors in shaping demand for food products and services. In conditions of wide supply and the dominant position of the consumer in the market for products and services, an important regulator of demand is the quality indicators of the restaurant's activities: the quality and range of products and services, conditions for recreation and leisure, the attitude of staff towards visitors, etc. In order to stimulate the choice in favor of a restaurant establishment, i.e., to actually influence demand, it is necessary to clearly understand which factors are decisive in this, as well as what changes

within the establishment will have a positive effect. This is what our further research will focus on.

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АСПЕКТИ БІЗНЕС-ПЛАНУВАННЯ ПІДПРИЄМНИЦЬКОЇ ДІЯЛЬНОСТІ ПІДПРИЄМСТВ ІНДУСТРІЇ ТУРИЗМУ ТА ГОТЕЛЬНО-РЕСТОРАННОГО БІЗНЕСУ

У статті розглядається конкуренція на ринку готельно-ресторанного бізнесу в Україні. Розвинуто концептуальні засади до бізнес-планування на прикладі підприємств галузі туризму та готельно-ресторанного бізнесу з використанням принципів системного підходу.

Бізнес-планування дозволяє здійснювати зростання ринкових часток в певних сегментах. На діяльність підприємств індустрії туризму та готельно-ресторанного бізнесу впливають сучасні тенденції: вплив війни, посилення конкурентної боротьби за споживачів, сформовані частки ринку та обмежені ресурси. Показано як відбір необхідних для забезпечення розвитку номенклатури та асортименту послуг, ринкових сегментів впливає на формування відповідних тактик і стратегій бізнес-планування.

Проаналізовано тенденції ресторанного бізнесу у м. Львів. Визначено основні тенденції функціонування закладів харчування. Сформовано характеристику сучасних змін на ринку. Показано підходи до сегментації споживачів як етапу бізнес-планування. Основними критеріями сегментації ринку є демографічні та економічні характеристики окремих груп споживачів. В дослідженні акцентовано увагу на ключових персональних характеристиках: статі, віці, сімейному стані, роді занять і середньомісячному доході на одну особу в сім'ї.

Визначено, що вікова структура відвідувачів є дуже різноманітна. Перевагу ресторанам віддає населення середнього та старшого покоління. Вплив розміру середньомісячного доходу пересічного індивіда на його попит щодо продукції та послуг ресторанів оцінено коефіцієнтом еластичності. Встановлено, що на масове відвідування підприємцями

закладів громадського харчування впливає фактор їх високої платоспроможності та мета відвідування – проведення ділових зустрічей, корпоративні заходи. Виявлено необхідність передбачення в бізнес-планах діяльність не тільки у товарній політиці, але й у створенні сприятливих умов для проведення часу.

Ключові слова: бізнес-планування; підприємницька діяльність; конкуренція; характеристика споживача; сегментація ринку; тенденції розвитку індустрії туризму та готельно-ресторанного бізнесу.

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