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Development Of The Infrastructure Of Turkısh Restaurants In The Tourıst Center Of Eastern Europe: The Case Of Kyıv

Halyna KUSHNIRUK
PhD in Economics, Associate Professor, Ivan Franko National University of Lviv, Faculty of Geography, Department of Hotel and Restaurant Business and Food Technologies, Lviv, Ukraine
halyna.kushniruk@lnu.edu.ua *(Corresponding Author)*

Mykhailo RUTYNSKYI
PhD in Geography, Associate Professor, Ivan Franko National University of Lviv, Faculty of Geography, Department of Hotel and Restaurant Business and Food Technologies, Lviv, Ukraine
mykhailo.rutynskyi@lnu.edu.ua

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ABSTRACT

Turkish restaurants are actively gaining popularity among consumers in different regions of the world. In recent decades, this trend has been most dynamic in the capitals and major tourist cities of Europe. The Eastern European region is a promising market for investment in the development of the infrastructure of Turkish restaurants. The purpose of the article is to analyze the potential and trends in the market of Turkish cuisine restaurants in Kyiv, one of the representative cities of Eastern Europe, and outline the Post-Covid-19 trends in the transformation of the city's restaurant business. The capital of Ukraine has been developing as a powerful air hub and center of international tourism, including gastronomic tourism. Since 2014, the share of Turkish cuisine in the structure of the city's HoReCa sector has been steadily growing. The Covid-19 crisis has become a powerful challenge for the restaurant business. The authors' research highlights the trend: since the summer of 2021, Turkish restaurants in Kyiv have been showing the highest rates of recovery of Pre-Covid-19 potential both in terms of the number of operating enterprises and the volume of customer turnover. The article acquaints with the modern infrastructure, features and prospects of development of Turkish restaurants in Kyiv.

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INTRODUCTION AND BACKGROUND

Turkish cuisine is without exaggeration the richest in variety of dishes among the ethnic cuisines of the Mediterranean region (Batu & Batu, 2018). Firstly, it is based on authentic dishes of nomadic life of the peoples of Central Asia (the closest ties are with the cuisine of Turkmenistan). Secondly, modern Turkish cuisine is based on a number of archaic elements, which are mentioned on the Hittite clay tablets, and were also characteristic of the ancient Phrygians, Lydians, Cilicians and other ethnic groups of the former Byzantine Empire. Thirdly, the basis of ethnic Turkish cuisine has been enriched by Arab and Berber traditions of cooking halal cuisine (Şanlier, 2005; Cömert & Özkaya, 2014; Gheorghe & Bulin, 2014; Kızıldemir, Öztürk & Sarıışık, 2014; Sormaz, Akmese, Gunes & Aras, 2016; Sormaz, 2016).

Since the 80s of the 20th century, with the development of mass tourism, Turkish cuisine has gained international recognition. And in the 21st century, gastronomic tourism, along with beach and cultural tourism, is a key motive for hundreds of thousands of foreign tourists to visit Turkey every year.

Over the last decade, the dynamic development of two trends of global consumer recognition of the merits of Turkish cuisine has been observed:

1) qualitative transformation of food service from a component of local hospitality into a powerful tourist and gastronomic industry – one of the top brands (tourist business cards) of Turkey in the world tourist market;

2) dynamic globalization of the development of Turkish restaurant infrastructure on all continents of the world.

The aim of the paper is to analyze the phenomenon of gaining commercial recognition and the great popularity of Turkish cuisine restaurants in Eastern Europe. Drivers of Turkish restaurant infrastructure development in this region are large polyethnic cities-capitals, as well as centers of accumulation of mass tourist flows from around the world. The object of the study is one of the most representative cities of Eastern Europe – Kyiv, the capital of Ukraine.

In recent years, the restaurant business in Ukraine has demonstrated a trend of sustainable infrastructure development of establishments of all formats: from fast food to classic restaurants. However, due to the Covid-19 pandemic, the Ukraine's hospitality industry completely ceased operations from March to summer 2020 for a period of total quarantine. Due to this and subsequent downtime (September 2020, January-February 2021), tourist centers in Ukraine have suffered huge destructive losses. In particular, in 2020 the restaurant industry of Ukraine lost almost 4 thousand restaurants (20.7% of the total). As of January 1, 2021, there were 14,786 restaurants, cafes and bars (vs 18,636 establishments in 2020). The capacity of the restaurant market decreased in 2020 by almost 30% and amounted to $ 0.5 billion (State Statistics Service of Ukraine, 2021).

Kyiv's tourism industry lost more than $ 1.1 billion during the total lockdown in March – May 2020. However, since April 2021, major cities in Ukraine, in particular Kyiv, have been demonstrating a gradual recovery of the restaurant business. Moreover, the statistics show a fundamentally new cultural and gastronomic trend for Ukraine: against the background of narrowing the market niche of traditional restaurants and cafes with Ukrainian and European cuisines, the segment of fast food and Turkish cuisine demonstrates the most dynamic recovery and expansion of the market niche. The analysis of this cultural and gastronomic trend is presented below.

LITERATURE REVIEW

Every year special scientific works of leading scientists, business analysts and experts-practitioners are devoted to the study of the processes of development of a network of Turkish cuisine restaurants at the level of states, regions, cities, international and local business. The positive dynamics of these publications is reflected in the specialized Internet platforms Scopus, Web of Science, etc. (Rodríguez-López et al., 2020).

Today, the success of the tourist center, along with the architectural heritage, is determined by the colorfulness of its gastronomic heritage, the ability of restaurants to reveal the ethnographic specifics of the cuisine of the local population. Some scholars directly consider the potential of the restaurant business of a tourist destination as a source of knowledge "Ethnographies of Where we Eat" (Beriss & Sutton, 2007; Aslimoski & Gerasimoski, 2012; Bertan, 2020; Etcheverria, 2020; Navarro-Dols & González-Pernía, 2020; Seyitoğlu & Ivanov, 2020).

Researchers recognize Turkish cuisine as one of the richest and most ancient cuisines in the world. Its most exquisite dishes originate from the court kitchen of the sultans of the Seljuk Empire (Bittman, Oseland & Bush, 2012; Batu, 2018). In addition, traditional Turkish food and drinks are more in line with current healthy eating trends (Kilic, 2009; Ozturk & Akoglu, 2020; Sanlier, Sormaz & Güneş, 2020; Bulut-Solak, 2021; Keskin & Güneş, 2021; Üctug, Günaydin, Hünkar & Öngelen, 2021), compared to daily meals rich in chemical ingredients consumed by Europeans or North Americans.

On the other hand, the innovation and creativity of Turkish cuisine make it the flagship of gastronomic fashion among the ethnic cuisines of the Mediterranean region and thus wins the loyalty of the young generation of consumers and the segment of gourmets (Tüzünkan & Albayrak, 2015; Viljoen & Kruger, 2020; Sivrikaya & Pekerşen, 2020; Yurdakok-Dikmen & Filazi, 2021).

One of the most notable global tourist and gastronomic trends is the growing popularity of Turkish cuisine and the development of Turkish restaurants outside Turkey (Sormaz, Akmese, Gunes & Aras, 2016). It is both a recognition of the consumer values of Turkish fast food (Akbay, Tiryaki & Gul, 2007; Sivrikaya & Pekerşen, 2020), and expensive conceptual Turkish restaurants – standards of oriental hospitality and luxury (Si (Clara) & Couto, 2020). The work of chefs of Turkish restaurants becomes well-paid and in demand in the post-Covid-19 period of recovery of the gastronomic and restaurant industry (Bucak & Yiğit, 2021).

Ukraine is an integral part of European tourist and gastronomic diversity (Kiptenko & Doan, 2015; Nistoreanu, 2020). In the cities-centers of mass tourism of Ukraine the restaurant industry is closely connected with tourist business, and its economic indicators directly correlate with incomes from tourism.

The Covid-19 crisis has become another challenge for the restaurant industry (Madeira, Palrão & Mendes, 2021). At the same time, in major cities of Ukraine, and first of all in Kyiv and Lviv, the restaurant business plays a significant role in overcoming the negative economic and socio-psychological consequences of the Covid-19 crisis and demonstrates the statistical trend of active recovery (Rutynskyi & Kushniruk, 2020a; State Statistics Service of Ukraine, 2021).

PRESENTATION OF DATA AND RESULTS

Kyiv is one of the oldest cities in Central and Eastern Europe. It is a recognized cultural and tourist capital in the world, a powerful air hub of international tourist flows between the states of the western and eastern, northern and southern macro-regions of the planet. The city originated in the late 5th century. It was named after its founder Kyi, the first documented ruler of Rus-Ukraine. However, the archeological complexes of the proto-city settlements on the Castle Hill were dated to the 2nd century BC. In the 5th – 9th centuries Kyiv was the capital of the state of Kuyaba (Arabic: كويابة Kūyāba). It was one of the three centers of the Rus or Saqaliba (early East Slavs) described in a book (dating from ca. 920) and mentioned in works by some of his followers (Ibn Hawqal, Al-Istakhri, Hudud ul-'alam).

In the 9th – 14th centuries, Kyiv was the capital of the powerful European state of Kyivan Rus. In the 1700s, the first self-proclaimed emperor Peter I transferred this name to his own state to justify the "historical" claims to the annexation of the territories of the Ukrainian Cossack state and the Tatar state of the Crimean Khanate. In 1917–

1921, Kyiv regained the status of the capital of the revived Ukrainian People's Republic. However, it was once again captured by Russian troops. Since 1991, after the collapse of the USSR, Kyiv has been the capital of Ukraine.

In the 21st century, Kyiv is the largest city in Ukraine and the seventh most populous city in Europe (3 million people are officially registered). However, the electronic census shows that this figure is 3.7 million people. Over the last decade, the city's population has been growing steadily by an average of 20,000 people a year. The city's population is multicultural. More than 130 nationalities and ethnic groups reside in Kyiv.

Kyiv covers an area of 827 km^2, of which only 350 km^2 or 42.3% were used for construction. The rest of the territory is occupied by reservoirs, as well as forests and parks. Kyiv is surrounded by an almost continuous ring of coniferous and deciduous forests. The green zone within the capital is 70 parks, more than 300 squares, boulevards, with a total area of 43.6 thousand hectares. Due to this, along with Oslo and Vienna, Kyiv is one of the greenest capitals in Europe.

There are more than 3,800 historical and cultural monuments on the territory of Kyiv, including UNESCO World Heritage Sites (in particular, St. Sophia Cathedral and Kyiv Pechersk Lavra with a thousand-year history). There are more than 100 museums, infrastructure for international congresses, symposia, exhibitions, festivals, competitions, etc.

In the Pre-Covid-19 Era, before the pandemic crisis, Kyiv annually attracted more than 3 million domestic tourists and about 2 million foreign tourists (in the 2000s – about 1 million and up to 0.7 million, respectively).

In late 2019 – early 2020, Kyiv was recognized as the most profitable city in Europe for cheapest city trips. The Ukrainian capital took first place in the ranking of European tourist cities for budget travel: according to the City Travel Index for 2019, for two nights in a 3* hotel, a guest paid an average of 36 EUR, and a weekend for two in Kyiv cost up to 250 EUR (Riviere, 2019).

During 2004–2014, the annual growth rate of 3-5* hotels in Kyiv was 35%. In 2018, there were 106 accommodation facilities in the hotel market of Kyiv with a total number of 9,800 hotel rooms. 3* hotels significantly dominate and make up almost 50% of the market (4,800 rooms in 45 hotels). 4* hotels make up 22% of the supply in the hotel market, of which about 31% are managed by three international hotel operators: Carlson Rezidor Hotel Group (Radisson Blu Hotels), IHG (Holiday Inn) and Design Hotels in a strategic partnership with Marriott International, formerly known as Starwood. At the end of 2018, the total number of hotel rooms in 4* hotels was 2,200. The number of hotel rooms in the 5* hotel segment is 18% (1,500 rooms). The 5* hotel segment of Kyiv is dominated by such hotel chains as Hilton, Hyatt, IHG and FRHI, which manage 71% of the hotel rooms of this segment.

The largest crisis in the restaurant business of Ukraine, including Kyiv, occurred in 2014-2016. It was caused by the most acute phase of the continental Ukrainian-Russian war. In the conditions of severe military-geopolitical and macroeconomic crisis in the state, in 2014, an unprecedented number of restaurants were closed in Kyiv (154 institutions were closed and 35 were established), in 2015 – 143 restaurants were closed and 58 new establishments were opened. However, since the end of 2015, the restaurant business has begun to recover from the geopolitical shock. At the beginning of 2020 (before the Covid-19 crisis) there were 2,387 restaurants, coffee houses, cafes, pubs and bars in Kyiv (Figure 1).

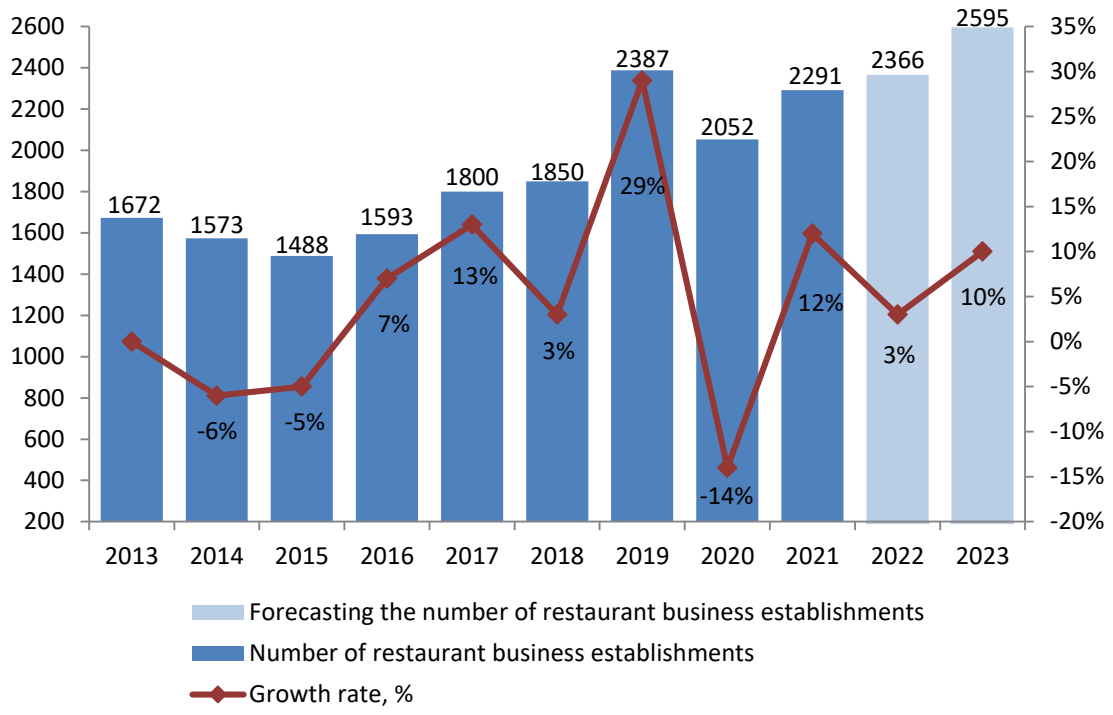

Figure 1. Number of restaurant business establishments in Kyiv, 2013-2023

Source: calculation and forecasting of authors according to the Main Department of Statistics in Kyiv (2021)

Kyiv's restaurant business market is characterized by relatively low barriers to entry for new players. Most newly established institutions close within a year or several years. The main problems of the restaurant business market in Kyiv are high rental rates for restaurants and insufficiently high level of solvency of the majority of the population.

However, despite this, in the pre-Covid-19 period the Kyiv's restaurant potential showed a trend of accelerated growth. In 2018, 215 new restaurants opened in Kyiv (vs 150 in 2017, 135 in 2016) (Pro-Consulting, 2019). In general, restaurants of the budget segment are opened, which are the most popular, as well as coffee houses and bars. As a rule, the loudest opening of restaurants chronologically occurs in the first half of the year. In the first half of 2019, 154 new restaurant business establishments were opened in Kyiv (vs 113 in the first half of 2018). The dynamics of Kyiv's restaurant business market development at the peak of the Covid-19 crisis is illustrated in Figure 2.

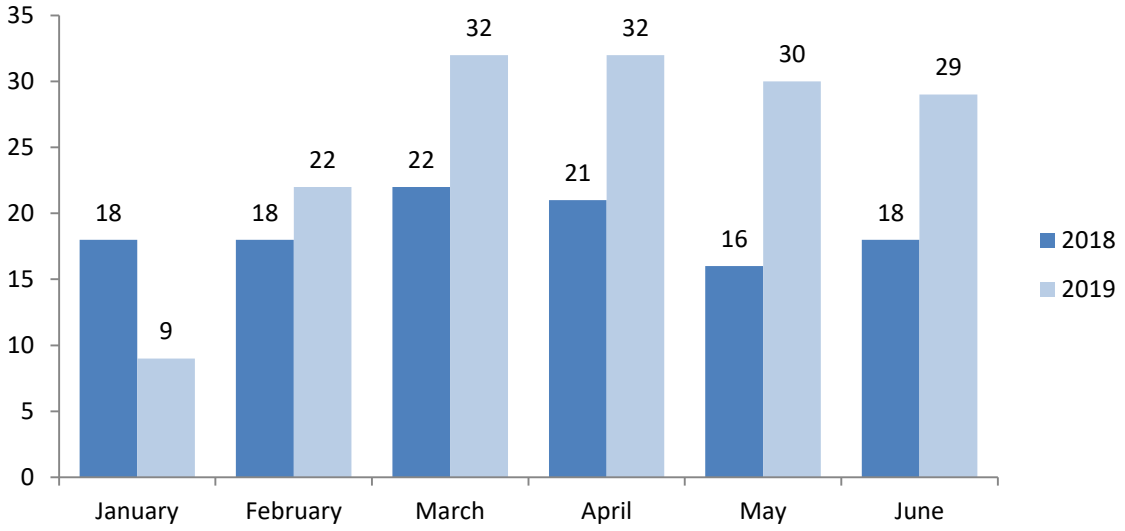

Figure 2. Dynamics of opening new restaurant business establishments in Kyiv in the first half of 2018 and 2019

Source: calculated by the authors according to the Main Department of Statistics in Kyiv (2021)

Based on Figure 2, the status of the gastronomic capital in the pre-Covid-19 period contributed to the opening of new restaurant business establishments every month, the development of HoReCa infrastructure. Thus, in January 2019, Kyiv hosted presentations of 5 new restaurants of Italian, Turkish, Georgian and author's cuisine; in February – 14 restaurants of Ukrainian, Georgian, Italian and Japanese cuisine; in March – 11 restaurants, including Turkish cuisine; in April – 12 restaurants of Ukrainian, Turkish, East Asian and American cuisine; in May – 14 restaurants of European, Turkish, Tatar and Ukrainian cuisines, etc. Both individual enterprises and restaurant chains are opening on the Ukrainian market. For example, in 2019, a network of five Turkish restaurants "Skalielde" with kitchen staff invited to work from Turkey opened in Kyiv, Kharkiv, Odessa and Mykolayiv. Along with restaurants, the number of traditional Turkish coffee houses in Kyiv and Lviv is growing dynamically (Rutynskyi & Kushniruk, 2020b).

In major cities of Central and Eastern Europe (CEE), including Kyiv, the positive dynamics of the development of the infrastructure of Turkish restaurants is determined by the following factors:

✓ Stable annual growth among the inhabitants of CEE cities of Turkey's popularity as a top destination for foreign travel in order to combine high-quality recreation with acquaintance with the rich cultural and gastronomic heritage of this country. As can be seen from the posts on social networks, almost every visit of foreign tourists to Turkey contributes to the global recognition and increase in the number of connoisseurs of Turkish cuisine around the world.

✓ Stable annual growth of Turkish tourist flows to CEE cities, including due to the expansion of the geography of budget flights of Turkish Airlines, Pegasus and European low-cost carriers Ryanair and Wizz Air between the cities of Turkey and CEE. For the most part, guests from Turkey, along with tastings of local cuisines, maintain a traditional loyalty to Turkish cuisine.

✓ The emergence of a small Turkish diaspora in CEE cities (including through graduates of local universities, increasing the number of mixed families, migration of family members, etc.), which form the primary link of potential consumers of Turkish cuisine.

✓ Increasing labor migration to European cities and involvement of a significant segment of these migrants in the implementation of entrepreneurial initiatives to open small businesses in the field of fast food and grill bars

with Turkish cuisine, mini-bakeries and other food production, outlets in markets and tourist streets for the sale of traditional Turkish spices, sweets, souvenirs and other gastronomic products.

✓ The growth of fashion trends in healthy eating, in particular the consumption of ethnic cuisine in the budget price segment as an alternative to food in global fast food chains.

✓ Rich recipe base and natural ingredients of Turkish cuisine (one of its dominant advantages for the mass consumer compared to the standard set of dishes and their composition (GMOs, preservatives, flavor enhancers, etc.) in a number of alternative food establishments of the affordable price segment).

Over the last decade, qualitative changes in the structure of gastronomic preferences of restaurant customers have taken place in Ukraine. When choosing restaurants, the population of Ukraine usually focuses on the price conjuncture and prefers traditional establishments with their favorite types of cuisines. The popularity rating, of course, is dominated by Ukrainian cuisine establishments. Historically, Ukrainians have also become fond of Italian, Russian (until 2014) and Caucasian cuisines.

In 2000-2008, the peak of consumer popularity of McDonald's and KFC networks occurred in Ukraine. Since 2009, the popularity of alternative Ukrainian fast food chains has been growing: Fast Food Systems, Wings, Puzata Hata, FreshLine, Salateira, FM Group, Pechena Kartoplya, Dva Gusya, etc. According to Pro-Consulting, the volume of the Ukrainian fast food market in 2019 was estimated at about $ 540 million, of which about $ 170 million was in Kyiv. On the other hand, after the financial crisis of 2008, the trend of infrastructure development of Japanese (sushi), Thai (noodle) and Turkish cuisine has grown in the cities of Ukraine.

The financial (2008) and pandemic (2020-2021) crises have had a more destructive effect on the restaurant business with traditional cuisine (Ukrainian & European cuisine). However, an interesting trend has been observing in the post-crisis periods: higher potential for adaptation to the crisis, recovery of turnover potential and post-crisis growth were demonstrated by Ukrainian restaurant establishments with Turkish and Far Eastern cuisine.

The growing popularity of Turkish cuisine in Ukraine is a natural process, which cannot be hindered even by the global Covid-19 crisis. The main motivator of this process, according to the author's assumptions, is the revival of the dynamics of tourist flows between Ukraine and Turkey (Table 1). For more than twenty years, Turkey and Egypt have been the favorite destinations for Ukrainians to go abroad during vacations to relax and immerse themselves in the colorful atmosphere of traditional oriental hospitality. In recent years, a growing segment of Ukrainian tourists are visiting Turkey to explore the diversity of tastes in different regions of the country (Rutynskyi, 2019; Yayla & Günay Aktaş, 2021).

Table 1. Dynamics of international tourist flows between Turkey and Ukraine in 2011-2020

International tourist flows	Number of Ukrainian tourists who visited Turkey*	Number of Turkish tourists who visited Ukraine**
2011	602404	76363
2012	634663	117152
2013	756187	151706
2014	657051	116302
2015	706551	172 931
2016	1045043	233 064
2017	1284735	313 112
2018	1386934	313558
2019	1547996	306428
2020	997 652	149183
2021 (January-October)	1971461	171955

Source: *Ministry of Culture and Tourism of Turkey (2021); **State Border Guard Service of Ukraine (2021)

In the pre-crisis years, the annual growth rate of Ukrainian tourists to Turkey averaged 10%. In the anomalous crisis of 2020, due to quarantine restrictions, more than 11 million 250 thousand citizens of Ukraine were able to go abroad, 67% of them were small border traffic to neighboring countries (Poland, Hungary, Russian Federation, Moldova). At the same time, in 2020, a large number of Ukrainians visited Turkey (998 thousand) and Egypt (730 thousand) for recreation.

From each such trip Ukrainian tourists return with positive emotions from tasting of exquisite dishes of Turkish (Middle Eastern) cuisine. In this way, the number of gourmets of Turkish cuisine in Ukraine increases from year to year.

The authors' study covered the period 2011-2021. Using a statistical package to calculate the Pearson's correlation coefficient, a direct correlation was found (except for the abnormal 2020) between the following indicators: ***y*** – the number of Turkish cuisine establishments in Kyiv; ***x*** – the number of Ukrainian tourists who visited Turkey.

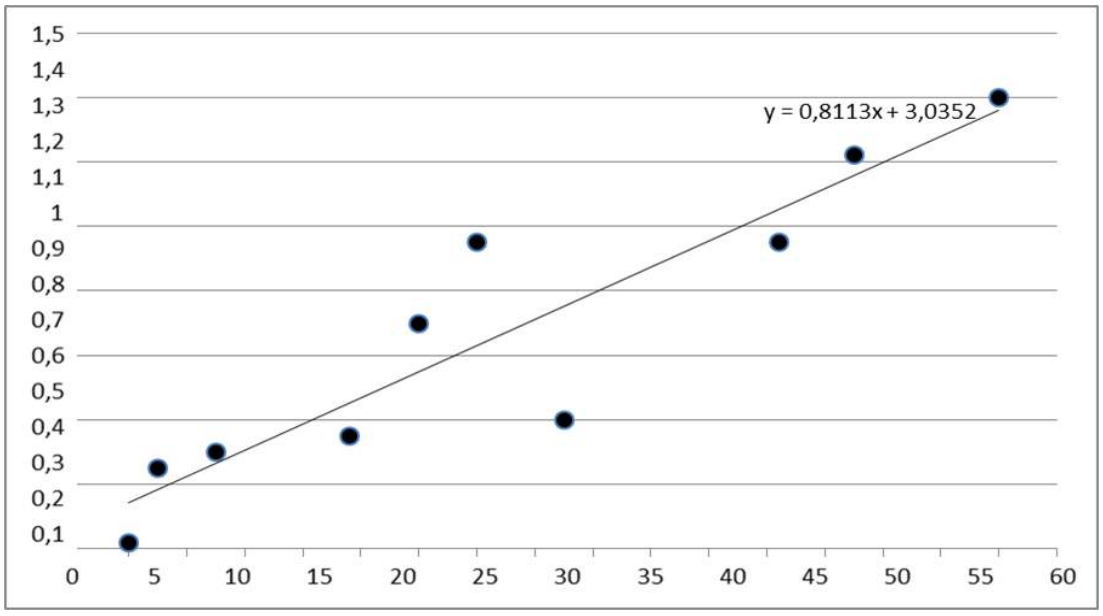

Figure 3. Correlation field between the trend of growth of the infrastructure of Turkish cuisine restaurants in the capital of Ukraine (Kyiv) and the trend of growth of the Ukrainian tourist flow to Turkey

y-axis – the number of Turkish cuisine establishments in Kyiv;

x-axis – the number of Ukrainian tourists who visited Turkey

Source: own elaboration

Based on the results of correlation analysis (Figure 3), the authors state the following: over the last ten years, the infrastructure of Turkish cuisine restaurants in the capital of Ukraine has been growing. The trend of Turkish restaurants network development in Kyiv demonstrates a direct correlation with such trends in the economy of services and socio-cultural dynamics as:

a) intensification of tourist exchange between Ukraine and Turkey, namely: arrivals of Ukrainian tourists to Turkey (r = 0.89), arrivals of Turkish tourists to Ukraine (r = 0.76);

b) increase in the total number of direct scheduled and charter flights between Ukraine and Turkey (r = 0.83);

c) the average cost of a standard double room in 3* hotels in Kyiv (r = 0.61);

d) the average price of a portion of doner kebab in budgetary Turkish cuisine establishments in Kyiv (r = 0.86).

It should be noted that the center of Kyiv turns into a kind of "Turkish quarter" due to the gradual displacement of European cuisine by Turkish cuisine. Among gourmets of Turkish cuisine are both Ukrainians (over 58%) and tourists from Europe and the Middle East and the Persian Gulf (42%). Loyalty to the native cuisine is primarily demonstrated by Turkish tourists. This is due to the fact that Turkish businessmen have been actively doing business in Ukraine for the last five years. A large number of Turkish businessmen constantly come and work in Kyiv.

Based on the analysis of feedback in social networks, it can be argued that Ukrainians are attracted to oriental interiors, delicious food and large portions of food in Turkish restaurants. Turkish cuisine is traditionally close to Ukrainians both in terms of products and methods of cooking. The adequacy of the price-quality ratio is the key to the success of Turkish restaurants. Although the restaurants are located in the center of Kyiv, but the prices are still reasonable, so guests return to them repeatedly. The motive of loyalty is also the nostalgia of Ukrainians for Turkish cuisine, which they previously tasted for the first time during a vacation trip to Turkey. (Some restaurants in Kyiv promote the advertising slogan "to taste Turkish dishes, don't necessarily fly to Turkey").

The Turkish House chain became a pioneer among expensive Turkish restaurants in Kyiv in the early 2010s (in 2020, due to the Covid-19 crisis, it left the Ukrainian market). However, in its place on Khreshchatyk (the main tourist street in Kyiv) new restaurants with Turkish cuisine began to appear: first – the restaurant "Meydan", later – "Turkish Restaurant Kyiv".

In the medium and high price segments, Turkish restaurants in Kyiv implement an active strategy for advertising on the Internet. Today, the author's menus of these restaurants compete for the attention of potential consumers on the pages of their official websites and columns on social networks, which impress with both promotions and design of information (see, for example, official website Tike (2021)).

Restaurants of Turkish cuisine in Kyiv are actively promoting to the consumer gastronomic rating and search services of the Internet. Along with TripAdvisor, other relevant popular Internet platforms compete for the attention of Ukrainians in the domestic market. Today, Ukrainians increasingly use such popular national rating and search services as tomato.ua (2021), restorania.com (2021), zoon.com.ua (2021), topclub.ua (2021), relax.ua (2021) and others, when choosing a Turkish restaurant for food and recreation on weekends. Based on the analysis of information from these thematic services, the authors of the article classified the best Turkish restaurants in Kyiv by price criterion (Table 2).

Table 2. Classification of the best Turkish restaurants in Kyiv by price criterion (summer-autumn 2021)

Low price category	Medium price category	High price category
Döner House	Döner ua	Mangal Grill & Lounge
Lokanta	Kebab&Burger by Dash	Tike Turkish Restaurant
Berliner Döner	SezamFood	Istanbul Meyhane Kyiv
Cay Breakfast House	The Turkish Grill	Ottoman House Cafe
Chaykhona BAZAR (5, Besarabska Sq.)	Istanbul Cafe & Restaurant	Pasha
Chaykhona BAZAR (2, Petro Bolbochan St.)	Turkish Restaurant Kyiv	Skalielde
Chaykhona BAZAR (44a, Anna Akhmatova St.)	Massimo Turkish & Italian Restaurant	Chef Dash Restaurant
Chaykhona BAZAR	Shashlikyan	Kardash Halal Restaurant

(16, Heroyiv Stalinhrada Pr.)		

Source: own elaboration

Turkish cuisine establishments of the economy segment naturally have the largest customer turnover. But it should be noted that they have already overcome the stereotypical attitude of the local population as one of the options for fast food. So today they are actively promoting their own market niche “natural delicious hearty food for everyone”.

Döner House (5, Besarabska Sq.) represents the culture of consumption of high-quality Turkish doner kebab, as well as dishes such as hummus and falafel and natural drink ayran. The cafe is open 24 hours a day and is a favorite among Kyiv residents.

Döner ua (30/10, Bohdan Khmelnytsky St.) is more stylish and expensive, with a focus on middle-class gourmets. Döner ua works in format of casual restaurant. It offers a great assortment of traditional Turkish cuisine. The restaurant’s menu is original, compiled by Chef Ahmet Oztyurk. Prices for typical dishes: Turkish breakfast – $ 6.1, classic Turkish doner – $ 5, Iskender pilaf – $8.8, lamb with cheese – $ 8.5, doner roll – $ 4.5, Turkish tea kettle – $ 6.5. Competitive advantages: kebab shop, kids friendly, takeaway service. The feature of the place is that pita is baked in a real tandoor.

Lokanta (13, Khreshchatyk St.) is located in the epicenter of sightseeing routes in Kyiv and represents all the diversity of Turkish cuisine. At the same time, the restaurant adheres to a moderate pricing policy, so it is a favorite place of office workers in the city center. Check for breakfast or lunch starts at $ 3.

Cay Breakfast House (31, Chokolovsky Boulevard), a cafe of hearty Turkish breakfasts and lunches, focused on the loyalty of its regular customers. This place is very popular among the Turkish population of the capital. There is a great assortment of pide, fresh vegetables and cheese, as well as oriental sweets for tea.

SezamFood (11, Sribnokilska St.; 58a, Zodchykh St.; 16a, Akhmatova St.), a network of stylish Turkish youth cafes, recently gained a high consumer rating among young people (Figure 4). There are quality and inexpensive coffee and oriental sweets, moderate prices for main dishes of Turkish, Uzbek, Armenian and Greek cuisines (lamb pide – $ 5.8, vegan pide with spinach – $ 3.5, doner – $ 5). Other competitive advantages: dishes according to traditional recipes are prepared on an open fire and in a wood-burning oven, takeaway service, delivery.

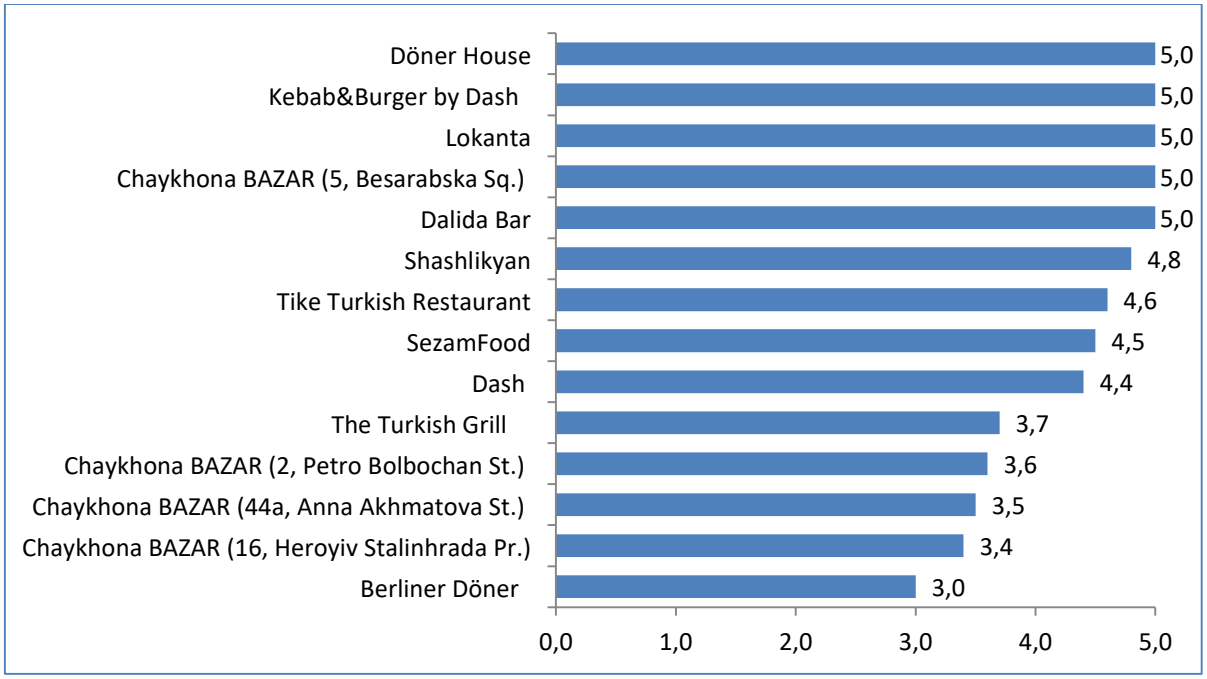

Figure 4. Consumer rating of the best restaurants by search criteria «Turkish cuisine places in Kyiv», compiled by the audience of the popular Ukrainian service tomato.ua (evaluation criteria – from 0 to 5 points)

Source: own elaboration

Istanbul Cafe & Restaurant (3, Peremohy Square) is one of the most fashionable youth establishments in Kyiv of medium price category (breakfast – $ 2,0-2,8, lahmajun – $ 2.1, kasarli pide – $ 3,8, rack of lamb – $ 5, Turkish coffee – $ 1.3, Turkish tea – $ 0.5, etc.). Competitive advantages of the restaurant, which opened at the end of 2018, are: cooking according to authentic recipes by chefs from Turkey, own pastry, halal dishes, breakfasts and business lunches, Turkish food and souvenir shop, delivery of lunches around the city, banquet menu, takeaway service.

One of the gastronomic and tourist business cards of modern Kyiv is Turkish Restaurant Kyiv (24, Khreshchatyk St.). It positions itself as the central Turkish restaurant in the capital of Ukraine, as it is located in the heart of Kyiv on the main tourist street near administrative government and municipal buildings and expensive 5* hotels (Figure 5). There is a great assortment of meat dishes, breakfasts, soups, salads, hot and cold snacks, dishes cooked in the oven or barbecue. The restaurant's activities are aimed at serving business lunches and corporate dinners with Turkish or completely halal menu. At the same time, prices for foreign guests are moderate: Turkish breakfast for two – $ 12, lamb salads – $ 7.7, Turkish coffee – $ 2.2, etc.

Figure 5. Turkish restaurants of medium price category in the center of Kyiv (Turkish Restaurant Kyiv – on the left, Istanbul Cafe & Restaurant – on the right)

Source: photo by the authors (2021)

The Turkish Grill (19, Baseyna St.) is located in the prestigious Pechersk district. The menu offers popular Mediterranean and traditional Turkish food like döner kebabs of various meats marinated according to special recipes. There is a separate grill menu. Guests can enjoy popular varieties of white and red Italian wines. A business lunch costs $ 4.

The best combination of traditions of Crimean Tatar and Turkish cuisine is offered by restaurants in the historic center of Kyiv, where Crimean Tatars, expelled from Crimea after its occupation in 2014, work. For example, Qirim is located in the heart of Kyiv on Maydan Nezalezhnosti (1, Taras Shevchenko St.). Its menu is focused on family visits with children and service of tourist groups. Sofra (10, Klovsky Uzviz) attracts with its family rural atmosphere. Its interior is decorated with ancient household items from the Crimea and the Ottoman Empire.

In recent years, the quality standard of the typical Turkish relaxation restaurant in the minds of Kyiv residents is associated with restaurants Chaykhona BAZAR of network “L'KAFA GROUP” (5, Besarabska Sq.; 2, Petro Bolbochan St.; 44a, Anna Akhmatova St.; 16, Heroyiv Stalinhrada Pr.). The largest Chayhona BAZAR is located in the heart of Kyiv on Besarabska Square. It occupies two floors and can host up to 350 guests. Colourful interior combines luxurious oriental style with European restraint. Mosaic ornaments and patterned textiles, colourful handmade cushions and carpets with oriental ornaments, dishes, lamps and souvenirs, brought from the markets of Turkey, Uzbekistan and Georgia decorate the place. There is an open kitchen with authentic tandoor and a brazier on the ground floor. Menu includes traditional dishes of Turkish, Uzbek, Georgian, Armenian, Lebanese and Moroccan cuisine. Unique condiments and spices are delivered from the markets of Turkey and Lebanon. Specialties of the restaurant are meataballs with sesame pasta and baked eggplant, mutton roll with pistachios, lentil soup cream, samsa, homemade noodles with veal, oriental fate, as well as dishes from chef: pilaf Chayhona Bazaar, hummus with various additives, kebabs from tandoor, sweets from dates and figs, rahat-lukum, nuts and dried apricots, ice-cream of its own production. Special tarhun and ayran, cucumber lemonade, sangritu of its own production are served. The bar serves author’s cocktails and fragrant hookah.

Massimo Turkish & Italian Restaurant (15, Saksagansky St.) is a successful symbiosis of Turkish and Italian cuisines. Famous Turkish sweets or relaxing hookah are also available. They serve Italian cuisine, classic salads, pastas and pizzas. The prices are moderate here. Restaurant is adjacent to the Apart-hotel Staryi Kyiv and Modern Center Kyiv Apartment.

In the segment of business and VIP-classes, Kyiv is able to impress a respectable foreign gourmet. Conceptual Turkish restaurants are popular among the bureaucratic, financial and creative Ukrainian elite.

Mangal Grill & Lounge (33/35, Saksagansky St.), a business class restaurant for “Beau Monde Events”. It was opened by the “star” of Russian pop music of Ukrainian origin Ani Lorak with her husband Murat Nalcacioglu. Competitive advantages of the restaurant are: an exclusive tasting set “Discover Turkey”, a large wine list, live music, open kitchen, craft Turkish spices for dishes. Of course, the main thing is brazier. Guests of the restaurant have the opportunity to watch the work of Turkish chefs who cook fish, seafood, meat and vegetables on the brazier. The interior of the hall is decorated with elements of luxurious oriental style. There are wide sofas and light lounge music.

Tike Turkish Restaurant (31A, Petro Sahaidachny St.) in the business segment is one of the most fashionable places of evening leisure in the capital of Ukraine not far from Kontraktova Ploshcha. This place is unique due to the four meter barbeque installed in one of the three dining halls. Cooking on the brazier in front of guests is a real show of Turkish cuisine. The menu lists traditional dishes of Turkish and Mediterranean cuisine. Specialties of the house are dishes of barbequed lamb and chicken. Restaurant has contemporary styled interior with ethnic elements of decor. The restaurant also offers a takeaway service. The author’s menu was created by the titled chef Shakir Demirer, who has experience in restaurants in Istanbul and Athens. The menu is based on traditional meat dishes. Among the desserts, Ukrainians liked Turkish Şekerpare and Künefe.

Istanbul Meyhane Kyiv (15/2, Yevhen Konovalets St.) is a top luxury restaurant in the business segment. There is an atmosphere of luxury and comfort in the style of folk tales “One Thousand and One Nights”. Here, every Friday, guests can listen to live music and enjoy oriental dances. Meanwhile, the chefs are organizing a full-fledged cooking show. Some dishes are cooked tableside while guests enjoy the hookah. The restaurant is very popular among corporate clients. Often the restaurant is booked on weekends for 2-3 months in advance (for holidays, weddings and corporate events).

Pasha (16a, Shota Rustaveli St.) is an expensive restaurant of author’s Turkish cuisine, based on recipes of dishes cooked for the Ottoman nobility. The restaurant belongs to the Tarantino Family network. It offers a great assortment of grilled meat dishes (from doners to marble steaks), cold and hot meze, Turkish bread, fresh pide, gozleme, pastries and sweets. There is a wine list of Turkish wines and aromatic hookahs. The animation is provided by performances of oriental dancers and DJs.

Kebab & Burger by Dash (30/10, Bohdan Khmelnytsky St.) and “Kebab Dash” (111/17, Antonovych St.) offer a wide range of traditional Turkish dishes. The main emphasis is made on meat dishes, which are cooked on an open fire. There are over thirty different varieties of shish kebab and Turkish snacks in menu. Dessert list includes an assortment of oriental sweets. Original interior of the restaurants harmoniously combines modern style and colourful elements of oriental ethnic decor.

Ottoman House Café (122, Velyka Vasylkivska St.) is a restaurant of the business segment in the tourist center of the city. The main competitive advantage of the restaurant is professional Turkish chefs, led by chef Ibrahim Kaya from Izmir, who has practiced in the best restaurants in Turkey and Italy. The author’s menu combines traditional Turkish and Mediterranean cuisine. Dishes are cooked in front of customers in a wood-burning oven, tandoor or on the brazier.

During the period 2010-2019 in Kyiv, the number of small tourist-oriented gastronomic establishments increased 6.4 times. The growth of the tourist flow guarantees a quick payback and high profitability of the gastronomic industry (Erkuş-Öztürk & Terhorst, 2016).

Prolonged COVID-19 crisis did not nullify the tourist flow to the city of Kyiv. The status of a fashionable destination on the map of gastronomic tourism in Eastern Europe, as well as the image of the cultural and tourist capital of Ukraine “worked” as motivators for thousands of Ukrainians: not to be locked in their homes for a whole year and dare to travel positively and emotionally inside their country.

The most dynamic trend of post-COVID-19 recovery was demonstrated in the first half of 2021 by fast food outlets. Their share in the structure of the city's restaurant business has grown to 36% for a year and a half (vs 28% in pre-COVID-19 crisis).

The opening of halal restaurants in the capital of Ukraine due to the massive tourist flow of tourists from Saudi Arabia, Qatar, Oman and Turkey to Kyiv has become an innovative trend of summer 2021 (Kardash Halal Restaurant, Sultan Food, Kuzu, etc.).

On June 1, 2021, Ukraine joined HOTREC (the umbrella Association of Hotels, Restaurants, Pubs and Cafes and similar establishments in Europe) and HSU (European hotel certification system Hotel Stars Union) headquartered in Brussels. Strategic goal of cooperation until 2030: improvement of domestic service product in accordance with EU standards, as well as strong promotion of the country's tourism potential in both domestic and target foreign markets.

Kyiv Tourism and Promotion Department, Kyiv Chamber of Commerce and Industry, Association of Incoming Tour Operators of Ukraine, Ukrainian Hotel & Resort Association, Ukrainian Restaurant Association, Association of Chefs of Ukraine, All-Ukrainian Association of Food, Ukrainian Association of Gastronomic Tourism and others actively implement the strategy of global information promotion of the city as a fashionable and safe destination of international gastronomic tourism, place where gourmets have the opportunity to taste original dishes of ethnic cuisines: Ukrainian, Italian, Turkish, Caucasian, European, Asian. Promotion of Kyiv's tourist potential in Scandinavia, the Persian Gulf, and the Middle East is scheduled for 2021. For example, on June 10, 2021, Kyiv presented its tourism potential in Istanbul during a meeting of the official delegation of the capital's city authorities with representatives of the Turkish tourism business. Representatives of the authorities and business of both countries discussed opportunities for the development of cultural, event, business, medical and gastronomic tourism between the capitals of Ukraine and Turkey. The event also included B2B meetings of representatives of Ukrainian associations and the Association of Turkish Travel Agencies (TÜRSAB). As a result, the All-Ukrainian Association of Gastronomic Tourism agreed to sign a memorandum of cooperation with the Turkish side.

CONCLUSION

Since May 2021, the restaurant business of Ukraine has been actively restoring lost positions. Rebranding and re-equipment of existing restaurants is underway. The premises of most closed restaurants in large cities are being bought out by investors and reorganized into fundamentally new food and recreation facilities.

The status of the national and cultural-tourist capital saved Kyiv's restaurant industry from complete collapse. Thanks to the acquired image and promotional campaigns in 2020-2021, tourists from other countries and cities of Ukraine actively visited Kyiv during periods of easing quarantine restrictions. In the first half of 2021, Kyiv was visited by 0.5 million domestic tourists and 308,000 foreigners (State Statistics Service of Ukraine, 2021). The intensity of scheduled direct flights between Ukraine and Turkey in the summer of 2021 resumed almost to pre-Covid-19 level. Until the end of September 2021, Kyiv International Air Hub actively served international flights from Asia and some European cities. Due to quarantine restrictions, the closure of the borders of the European Union for mass tourism, for almost 172 thousand tourists from Turkey in 10 months 2021 the capital of Ukraine has become a popular tourist destination with a range of original local entertainment and gastronomic products, drinks and dishes of ethnic cuisines, locations of slow gastronomic tourism for gourmets.

In Kyiv in the post-Covid-19 period, the authors predict the growing popularity of concept restaurants, as well as restaurants with Turkish and East Asian cuisine (Vietnamese, Korean) and restaurants with inexpensive seafood. Fashion for innovative Moleculer Cuisine dishes will grow both in Istanbul (Tüzünkan & Albayrak, 2015) and in Kyiv. Also, the development of Kyiv's restaurant business in 2022-2030 will be largely related to the activity in the market of foreign and Ukrainian producers and suppliers of halal food (Jia & Chaozhi, 2021), as well as with

the high growth rate of franchising. In the period of post-Covid-19 recovery of consumer potential, these factors have reason to become powerful catalysts for the development of the restaurant industry in the capital of Ukraine.

Thus, despite the Covid-19 pandemic, the outlook for the future development of Turkish restaurants in Kyiv, a representative tourist city in Eastern Europe, is optimistic. The market of Turkish cuisine in Kyiv has favorable conditions for full recovery by the end of 2022 and further successful expansion of the market niche in the capital of Ukraine. In the post-Covid-19 period, the authors predict the annual growth rate of the infrastructure of Turkish cuisine establishments in Kyiv from 1.2% (expensive concept restaurants) to 5.6% (mini-establishments of budget price category).

According to the authors' research, the main stimulating factors of post-crisis recovery and further sustainable development of infrastructure and customer turnover of Turkish restaurants in Kyiv in 2022-2032 will be: 1) popularization and promotion of delicious Turkish cuisine among the population of Kyiv; 2) the significant growth of the city's tourist popularity in the world; 3) resumption of intensive passenger low-cost air transportation in the post-Covid-19 period; 4) global fashion for gastronomic tourism; 5) digitization of gastronomic tourism and original polyethnic gastronomic culture in Kyiv.

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