Evolution of dining experience & eateries in Indian urban landscape

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Abstract: Food & dining has been the centremost driving force, shaping our settlement, behaviour & relations in the course of civilization. With the emergence of towns & cities, we saw the beginning of community eateries & dining establishments where people ate, drank & enjoyed meals together. A new dawn came with the industrial age & colonization era, resulting in an increase in production & concentration of labour in cities & towns. As a result, different changes took place in the urban landscape & in the eateries around the cities, such as Mumbai.

This study has conducted thorough research with methodology based on the primary data collection through surveys, observations& personal interviews along with the analysis of a wide range of documents as secondary data. The aim of this paper is to analyse the cultural, political &human behavioural impact, and also understand the timeline & forthcoming shift in the restaurant & dining business. Although eateries & restaurants have existed for millennia, the rise of outdoor dining business post industrial revolution especially the tremendous growth after the second World War & the subsequent economic progress in Mumbai, is where this study is focused.

With the implementation of the methods of research and data collection, the findings are extremely informative and give us an indication of the future developments in the sector in Mumbai. It is concluded that the dining trends & on-going business is majorly influenced by human factors such as consideration of socio-economic status, lifestyle & food habits, dining patterns & formats, cuisine & cultural influence and human behaviour.

Keywords: Cuisine & Culture, Dining history& future trends, Food & beverage trends, Mumbai Eateries, Restaurants evolution

Introduction

Food is an essential part of people's lives, and not just a means of survival. Right from the days of the Stone Age, early humans hunted, roasted, feasted game & sat around the fire, which can be referred to as the community feast at its primitive stage. With the advancement of the Iron Age & subsequent changes in society, we see innovation in cuisine, dining rituals & dining practices.

Today, restaurants which have become the most common places of eating in public, have their origins from the taverns, inns, traiteurs (cookshops or cook/caterers), and boarding houses of

earlier times. Also, food stalls and street vendors have provided food for the urban population for centuries. At those times, those establishments served for people who did not have cooking facilities, who were less well off, and for travellers who were in search for food. The meals at those places were served at a fixed time with little or no choice of alternatives. It was not possible to order special food or eat at a specific time of one's own choosing. People ate what they could get from the communal dish served at a certain time. The meal, which is called 'table d'hote', was eaten at a common table. Generally, the diners were a regular crowd of people (workers, local artists, old friends) and they knew where to sit at the table. The price of the meal was for a head at the table. (DefneAkdeniz ,2019).

In Europe through the Middle Ages and into the Renaissance, taverns and inns continued to be the main place to buy a prepared meal. In Spain, these establishments were called bodegas, which served small savoury Spanish dishes called "tapas." In England, food such as sausage and shepherd's pie were popular (LorriMealey ,2018).

DefneAkdeniz (2019), states that, in addition to taverns, coffee houses were another early form of today's restaurants. Coffee houses and cafés existed in Arabia and Persia in the fifteenth century, and also in the Ottoman Empire in the sixteenth century, earlier than restaurants. After coffee came to Europe from the Middle East and the Ottoman Empire (i.e., the Levant), the cafés came into being in Europe. Paris is often regarded as the birthplace of the modern restaurants that we know today. But Parisian restaurants with innovative chefs, lavish meals, and luxurious interior design did not emerge suddenly. Their formation took almost two decades (18th and 19th centuries) and was subject to many political, economic, social and cultural factors taking place in French history. The standard literature about the origin of the modern restaurants says that the restaurants were invented in Paris in the 1760s and began to serve "restaurants", a broth or bouillon made from boiled meat.

The emergence of modern restaurants has been an evolutionary process which came into being mainly in Paris, France, spread all over the world & continuously evolved throughout the world in the last three centuries with the imperialistic advent & the subsequent colonisation. Dining experience has been a subject of numerous changes & advancement to become what we see around today in the 21st century.

From board menu to paper menu & digital menu, from the classic Indian Thali system to A 'la' carte, Buffet spread to tasting menu, sit down service to casual dining; menu offerings & food presentation the have also continuously evolved with time. Menu engineering, portion size & pricing are the most competitive in today's world considering the competition in free markets. With the rapid boom in travel & tourism in the past few decades, we also see different cuisines making their way to Mumbai & other metro cities. Also, it continues to adapt & innovate as per the market needs & changing trends globally. Cities such as Mumbai, which are buzzing with a young demographic and rising per capita income, have witnessed a surge in demand for diversified dining options, global concepts & more experiential culinary engagement in recent times.

Indian Dining traditions, Colonisation & birth of industry

Food is a big part of the Indian culture, every community that lives in India has a distinct food ethos. Most of these however, have been influenced by Aryan beliefs & practices. Food in Aryan belief was not simply a means of bodily sustenance; it was part of a cosmic moral cycle – *The taittriya Upanishad.* (K.T Achaya ,1994).

Anthropologists have long recognized that rules and practices concerning food and caste in India are closely intertwined. Caste identity is also reflected in what people eat: castes within the Brahmin and Vaisya *varna*s are usually vegetarian; castes from the other two *varna*s might eat meat; and Dalits might also eat beef. Variations in preparation and tastes are also frequently attributed to caste as well as to strong regional affiliations. For example, some Brahmins, older women in particular, avoid garlic, onions and other 'heating' ingredients deemed inappropriate for their bodily substance, while others claim to adopt a more complex or refined meal structure than their regional peers from other castes (James staples, 2014). In Indian caste system, it is observed that maintaining caste integrity is correlated not only in terms of its essence with the intake of food and water, but also in terms of who cooked or handled the food.

In India, the earliest reference to restaurants dates back to the early 250 BC, when taverns or inns provided food to hungry travellers. Street vendors and small stall owners also sell food in local markets and most Indian towns and villages. Om Prakash (1961), mentions, religious rules disallowed the use of wine for brahmanas but it remained popular enough with kshatriyas& other sections of society. Variety of food habits also resulted from geographical factors; royal orders & religious prohibition could not prevent the use of rice & fish in eastern & southern India.

India sought to define itself gastronomically in the face of colonization beginning in the twelfth century. First, Central Asian invaders formed several dynasties known as the Sultanates from the twelfth to the sixteenth centuries. The Portuguese established a colony in India at the beginning of the 16th century. During this time, the Portuguese left their mark on certain Indian cuisines in two ways: by introducing new ingredients to India – including spices that are seen as an essential part of Indian food today. The British came to trade as the East India Company, The British and other Western powers came to India in search of spices to preserve meats, but the age of empire dictated culinary exchanges. India received potatoes, tomatoes, and chilies from the New World, and all became an integral part of the cuisine (TulsiSrinivas, 2011).

The modern-day restaurants probably started mushrooming with the expansion, especially with the growth of the Military initially, later with Indian Railways and Civil Services. As people started to travel far and wide across the country, there was a spurt in eateries that could serve them freshly cooked food. Urban dining has its roots with the origin of café & eating joints in clusters such as Kolkata & Mumbai in the colonial era and proliferated in the mid-19th century as industrialization and urbanization transformed the landscape and let to the birth of mills & factories in the cities.

Tulasi Sriniwas (2011), mentions, Indian food historian Madhur Jaffrey states that as the

British Raj set roots in the subcontinent, the English-trained Indian cooks (Hindi—khansama) to make a fusion food of breads, mulligatawny soup mince pies and roasts, puddings, and trifles. These dishes were later adapted to the metropolitan Indian table for the officers of the Indian army and British-Indian club menus. "Military hotels"— restaurants where meat and poultry were served primarily to troop members and often run by Parsis or Muslims—became popular as the new concept of public dining gained popularity in urban India between 1860 and 1900. The oldest known cafe from this era is Leopold's Cafe in south Bombay (now Mumbai), where military hotel culture first took root. Other "hotels" or eateries primarily served, as they still do, vegetarian domestic cuisine in a public setting.

The most notable effect of the British on Indian cuisine is found in the field of brewing. Taverns opened by the British served wine, beer, rum, and other British spirits. Punch was a popular drink served at such places. It was made by mixing five ingredients – arrack, rosewater, citron juice, sugar, and spices, resulting in the name paanch (means five in Hindi). Beer, especially ale, was a popular beverage among the British in India. Later, the antimalarial properties of quinine were discovered and it was added to soda water, giving birth to tonic. It was paired with gin and served as gin and tonic at clubs, (VishuAntani&SantoshMahapatra, 2022).

Dining overview post-independence in Mumbai

The restaurant industry in India & particularly in Mumbai grew rapidly post-Independence. It comprises two major segments; Organised & Unorganised Category. The organized segment is a well-developed and well-structured restaurant industry in India. The organized segment focuses on the structured supply chain with quality control. The restaurants have multiple outlets with proper and efficient management. In addition, the operational workflow is seamless with having standardized interior and exterior designs. These are Dining (Fine Dining, Casual Dining), Bars and Lounges (Cafes, Food Courts, Kiosks, Clubs) & Quick Service Restaurants (Take Away or Home Delivery).

The unorganized segment, on the other hand, was the biggest portion of the restaurant industry in India is occupied by unorganized foodservice businesses. The lack of a proper chain of supply, organizational structure, maintenance, technical standardization, and business practices are common scenery of an unorganized segment, such as Food Trucks, Dhaba's, Street Stalls, Roadside Eateries Hawkers & Food Carts.

Mumbai (Old Name – Bombay) being the financial capital of the country & the major destination for jobs in the country, has been one of the largest contributors to the economy and shaped the corporate culture post-independence.Subsequently, with the inflow of more & more people from all over the country to the city, the land of opportunities. This, however, also let to the geographical expansion of a city which is surrounded by the ocean & mountain range on the other side. As a result, the city expanded vertically & became the most densely populated city in the country. The exploitation of the offshore oilfields such as Bombay High and the city's key role in naval defence has enhanced its supremacy as a megacity of India.

Mumbai is the most cosmopolitan city in India. In comparison with the rest of the country, the

city is quite liberal. With a regular influx of immigrants from rest of India, the citizens, popularly known as 'Mumbaikars', have shown remarkable tolerance towards other cultures, making it a true cultural melting pot. KunalVijaykar (2011) discussed Mumbai; food is a bit tricky.

The communities that inhabited this city were the Kolis, Parsis, Iranis, Anglo-Indians, East-Indians, Borahs and Khojas, Maharashtrians, PatharePrabhus, South-Indian Hindus and a few others. Most lived in their ghettos that were scattered around the island. The food that was native to these communities, especially during festivals, spilled out onto the streets here. The by lanes of Muhammad Ali Road, where the Borahs lived, would turn into a gastronomic paradise as stalls selling samosas, cream tikkas and kheema rolls worked through the night. The Maharashtrian mill worker and the South Indian Hindu had left their villages and come to the metropolis in search of work. Many lived as bachelors with no kitchen to speak for. They found comfort in home-cooked meals in low-priced, fixed-menu eateries.

Image 1. Mumbai political map

AatishNath (2022), writes, Mumbai is forever expanding upwards and outwards. A frenetic commercial hub with a growing population, the city is always on the move — a quality that's reflected in its cuisine. Its renowned street food developed in response to the needs of the

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working class — commuters travelling long distances and looking for quick, nourishing bites. Snacks such as vadapav (a moist potato-patty sandwiched in a soft bun), pavbhaji (a buttered roll with spiced gravy) and kathi rolls. Mumbai, however also had a share of restaurant which are running from British era & iconic. On that historic note, the city is brimming with incredible eateries, restaurants and bakeries that have cultural and lifestyle influence on people such as Café mondegar, Yazdani Bakery, Gaylord restaurant, Leopold café, etc.

Economic Reforms, Global trends & cultural impact on food habits

The economic reforms of 1991 brought a new dawn to the dining & restaurant industry. However, eating out for leisure remained a fairly rare phenomenon for the majority of Indian families until the rise of the great Indian middle class post liberalization. As Western influences percolated down, the lifestyles and food habits of Indians began to change. More and more young people began to leave home to work in other cities and towns and, for them, takeaways and dining out became necessary. This was accompanied by an increase in disposable income and a general willingness to spend on the experience of dining out.

The real game changer was the entry of American fast food chain McDonald's into India in the year 1996. The model of franchise management began in the 1990s in India, with the start of the era of liberalisation. This gave rise to a huge upsurge in the quick service restaurant (QSR) industry. The following years saw the establishment of many international fast-food chains, such as Dominos, Pizza Hut, KFC, etc. And while the QSR industry was thriving, Indians discovered fine dining, too. The joy of experiential eating was new to the Indian consumer, who was hitherto reluctant to spend copious amounts of money on dining out.

Although it has never had a standardized diet, India has traditionally "imagined" its cuisine with respect to the incorporation and domestication of "foreign" influences.
In the past two decades, with India becoming an economic powerhouse, a variety of multinational fast-food companies have entered the previously protected Indian culinary landscape. They include Pizza Hut, Mc- Donald's, KFC, PepsiCo, and, most recently, Taco Bell. But these companies have had to "Indianize" and self-domesticate to conquer the notoriously difficult-to-please Indian palate. Today, urban fast-food chains in India have become common and are transforming the middle-class diet, TulasiSriniwas (2011).

The growth of the restaurant industry coincided with the growth of the great Indian middle class, which was the by-product of liberalization. Over 45 million Indians satiated their food cravings by dining out at their favourite restaurants in 2021, *according to tech platform Dine out*. In a year marred by the second wave of the pandemic, this number is significant. And given growing aspirations, higher disposable incomes and increased tech-savviness of consumers, the restaurant industry could touch new heights in terms of eating out in 2022.

"Cloud kitchen is the future of the restaurant industry in India with robust technology and a lucrative business model" The Times of India, Sep,2022

While previously there were various obstacles to ordering-such as minimum order value, small delivery radius, and misunderstood and misplaced orders, many entrepreneurs gave rise to food ordering start-ups and led to the expansion of food delivery aggregators like Food Panda, Swiggy and Zomato. Ordering good food was now possible with the press of a button and the Indian consumer couldn't be happier.

Up until a few years ago, the only international cuisine that worked for the Indian palate was perhaps Chinese and Italian. Since then, the Indian palate has grown to accommodate global cuisines. There has also been a great surge in Lebanese, Mexican, and Asian cuisines lately. Especially in metro cities, restaurateurs are coming up with new concepts introducing new cuisines. This is attributable to the fact that Indians are travelling all over the world and returning with their palates pleased and tempted by the exciting flavours and delicious foods on offer throughout their international travels. It's not just Indian, but also international chefs who recognise the huge untapped market and have set up high-end restaurants in the country. Ian Kittichai, the famous New York chef, opened a Thai restaurant in Mumbai called Koh. Since he imports all his ingredients, he is able to serve his diners authentic Thai fare with a modern twist. An interesting trend has begun and, due to an increased interest in India as an investment destination, many international fine-dining chains are waiting in the wings to set up shop in India. The Indian consumer has a lot to look forward to in terms of experiential cuisine in the coming years (SakshiSingh ,2021).

Another notable trend evidently visible is the increase in drinking culture, with the influx of younger generation drinking is no more perceived how it was looked at in past, but rather a product of lifestyle. Mumbai offers all kind of avenues ranging from Pub, lounge, high energy bar, nightclub & cocktail bars. An increasing trend of young men & women drive maximum consumption of wines, cocktails & beer. Women saliency in consumption of alcohol is on rise since past two decades. Bartenders & bar community also has led this change by helping consumers to refine the tase& upgrade from conventional alcohol options to new options.

Methodology

Primary Data: Primary Data was collected by designing an interview with various restaurant, café & outlet owners &team, various F&B establishments were studied. Present Study was conducted in Mumbai City. Observation method was used to validate the primary data. The researcher has made use of multiple tools & techniques which are interview schedule & observation method. Interviews were conducted in a diverse sample of food joints, cafes, restaurants, lounges, bars & star-hotels such as listed below –

Restaurants	Food Joints	Pub & Lounges	Star Hotels & Clubs
Yauatcha, BKC	Café Madras, Matunga	Café Leopold	St Regis
Olive, Bandra	Britannia & Co, fort	Social Café, Versova	Taj Lands in
Bombay Canteen	Jai hind, Bandra	Bar Stock exchange, Juhu	JW Marriott Juhu
The Table, Colaba	Shiv Sagar, Juhu	Toit Brewery, Lower Parel	The Oberoi
Estella, Juhu	Vrindavan, Khar	Janta Bar, Bandra	SOHO Club
Sassy Spoon, Powai	McDonalds, Andheri	Foo lounge, Andheri	Otters Club

Secondly, to understand the consumer perspective, 200 consumers of the right target audience were surveyed through a questionnaire. The target population of the study was the millennials, corporates, woman consumers,GenZ& HNI's working or living in Mumbai. Consumers were also interviewed through a survey conducted by online survey to gain the perspective of their preferences, tastes, aspirations & trends –

- Choice of dining format – Restaurant/lounge/pub/hotel
- Average spends per event / per weekend
- Age group / Gender ratio
- Choice of cuisine / Food & beverage split
- Choice of fine dine over casual dine
- Choice of non-alcoholic beverage over Wine/Beer/Spirits/cocktails
- Choice of open-air venue vs inside premise
- Option of Home delivery over Dine In.
- Operation hours & footfall

Secondary Data: Secondary data was collected from various articles published in journals, newspapers, websites, magazines, etc. The researcher also referred with various members of industry including influencers, veterans & Food & beverage bloggers. Various data was also studied for quantitative analysis from recognised source regarding the dining industry in Mumbai.

Data analysis & outcome

Using above methods and techniques different factors are identified & studied -

- Socio-economic factors
- Lifestyle & food habits
- Dining patterns & Formats available
- Human behavioural factors
- Cuisine & cultural influence

By understanding these factors with respect to the restaurant & dining industry in Mumbai, the ongoing changes & trends are being interpreted which will impact the market & consumers –

1. Location of the dining establishment & consumer mix.

Mumbai city is broadly categorised in three segments as per the geographical developments post-independence, in which suburbs & greater Mumbai got developed & populated in last few decades. These three areas are –

- Business Complex such as Nariman Point, BandraKurla complex, Lower Parel, etc.
- Residential locations such as Andheri, Ville-parle, Chembur, Worli, etc.
- Tourist hubs such as Colaba, Fort, Marine drive, Bandra west, Juhu etc.

Fig 1. Mumbai's Geographical Consumer mix layout
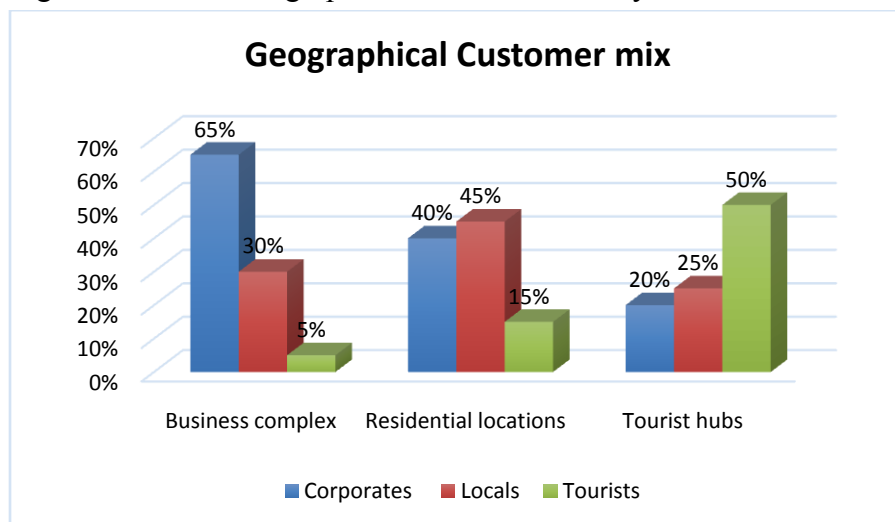
As per the finding & extensive discussion with people in the industry, there are three main categories in which we can classify consumers. Corporates (Working professionals), local residents of Mumbai & tourists (domestic & international).

As shown in fig 1. Corporates have the highest saliency of 65% in the business hubs as compared to the other parts of the city. Most of these are lunch & evening operations. Many of these venues located at the business hubs create special menus & offers to attract the locals

& tourists, especially on the weekends. Outlets within the residential districts of Mumbai offer a better mix of the variety of outlets too, such as tea/ coffee café, fine dine, casual dine, pub etc. The residential location has shown a mix of traffic from locals & corporates.

However, here there is a strong all-day dining base & outlets that cater to a better mix of customers representing the true cosmopolitan culture of Mumbai. Dining venues around tourist hubs have shown close to 50% footfall from tourist & weekend local tourists from far-off districts of Mumbai. Business is restricted to a timeline of 1.30 am all night & no dining venues are available post that except a few five-star hotels.

As per the data obtained, **more than 85% of the total dining establishment are on rented premises in Mumbai**. High real estate impacts the overall profitability of outlets, with rent being the biggest overhead to the operational budget. Since most of the venues are rented to management for operation, the ownership & brand name keeps on changing but the premises/property remain the same as the landlord/owner.

More than 80% of the customers at the venue use public transport, such as local train, bus, auto-rickshaw & taxi. Many individuals expressed in the interview that the parking & space constraints of the premises remain a continuous challenge. Apart from the five-star hotel & venues inside premises, as, mall & shopping centre, outlets generally struggle to provide parking around the outlet.

2. Dining formats & Average per cover

Food & dining Industry is classified in two segments: organized and unorganized based on the following three key parameters: (i) accounting transparency, (ii) organized operations with quality control and sourcing norms, and (iii) outlet penetration.

Unorganized Segment – It includes roadside eateries, hawkers, stalls which have been the most common eating out option.

Organized Segment – Consists of: a) Standalone Restaurants/Outlet across all formats. b) Chain restaurants/Outlet. c) Hotel & clubs. Below data highlights the APC of the organised segment & changes in past two years-

Table 1- Average Consumer Spend across Formats & rate of change

Organised Dining Segment	Description& Examples	Average Spend Per person	Increase in past three years
Café / Tea house	Coffee & Tea avenues, bakeries & confectionery More focus on beverages sales e.g.: Starbucks, Chaayos, Café Coffee Day etc	100-250	7-8%
Quick Service Restaurants (QSR)	Focused on speed of service, affordability and convenience. Strong focus on takeaway & delivery e.g.: Pizza hut, McDonald's	75-250	4-5%
Dessert Parlour/ Ice-Cream corner	Ice-cream brands and has now extended the dine-in/parlour eg: Naturals, Baskin-Robbins etc.	50-150	7-8%
Affordable Casual Dining Restaurants	A restaurant serving moderately priced food in an ambience oriented towards providing an affordable dining experience, with table service. restaurants. e.g.: Shiv Sagar, Vrindavan, etc	300- 450	10-12%
Premium Casual Dining Restaurants	Full-service restaurants with eclectic high-quality interiors and high standards of service e.g.: Bombay canteen, Sassy spoon, Foo, etc	500-750	12-15%
Fine Dining Restaurants	A full-service restaurant with premium interiors, specific cuisine specialty and high standard of service, unique ambience and an upscale service & highly trained staff. e.g.: Yauatcha, Table, Olive, etc	1200-1500	4-5%
Pubs, Bar & Lounges	Focus on alcohol and related beverages and includes lounges, night clubs and sports bars. e.g.: Social, Bar Stock exchange, Leopold, etc.	750-1000	15-20%
Star Hotel & Premium Clubs	These are the top end luxury venues located inside a Five-star hotel or similar premises, High end venues e.g.: St Regis, Taj Lands in, The Oberoi, etc.	>2000	0-2%

There is a positive growth of 20-25% in the case of pubs, lounges & bar and 15-20% in the

case of premium fine dining. Data suggests that experiential dining & experimental dining did increase in the past 2 years (FY 2021 & 2022)

As per the NRAI India Food service report 2016, the Quick service restaurants & the Casual dining restaurant standalone/chain have had the highest CAGR in, past 5 years, FY 2017-2012 of 14% & 16% respectively. The majority of the growth is coming from Metro cities such as Mumbai. As per interaction with restaurant owners & management, Mumbai has seen a steep rise in the pub, lounge & bar segment in the past decade, alcohol consumption has increased in-premise venue, and reason stated for this consumption is the increasing young working population with disposable income.

3. Eating out Patterns of Mumbaikars

As per the interviews taken in different outlets across the city, we found that Mumbai offers a good mix of gender participation in eating out across different age groups as shown below in fig 2.

Fig 2. Gender & Age Pattern of Mumbaikars
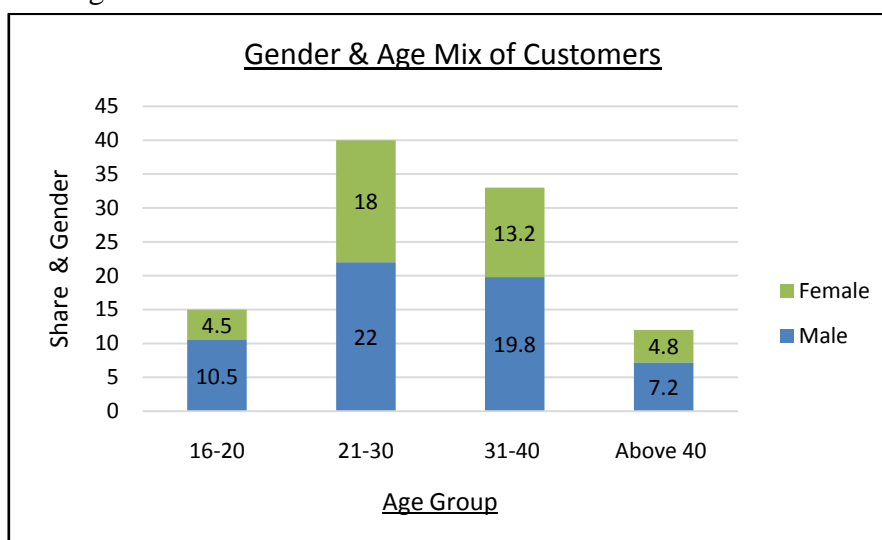
As per the observation, the participation of the age group (16-20, also addressed as GenZ) in dining is 15% of the total pie, out of which girls' participation is approximately 30%. The age group (21-30) makes the highest share of 40% of the dining out population, in which the gender gap in far less, with 45% of female participation. The third group is of the Age (31-40, also addressed as Millennials), which also contributes to the highest APC for any restaurant. It is 33% of the total number here, so the female share is a good 40% and, at last the above 40 age group which again is a good contributor to the APC of the restaurant is 12% of the total mix.

The male to female eating out ratio improves with the age group of 21-30 and continues at a good 40% & above in the demography. In some kinds of venues, such as restaurants/ pubs/ lounges, the outlet even runs women-friendly offers such as ladies' night, women-only happy hours etc. to entice the consumers. The age group (16-21) is observed spending most of the time in cafés & casual dining restaurants due to limited funds at their disposal.

4. Consumption Patterns – Food vs Beverage sale

As per the research, the general ratio of food sale vs beverage sales is 90:10, but this ratio is limited to the venues where there are no alcohol serving permits. Non-alcoholic beverages such as Tea, coffee, juices, mocktails etc. account for a small percentage of sale except in the cafés and tea shops. With alcohol permit this ratio changes in substantial proportion depending upon the format to format of the dining venue as shown below in fig 3.

Fig 3 Food & alcohol sale ratio
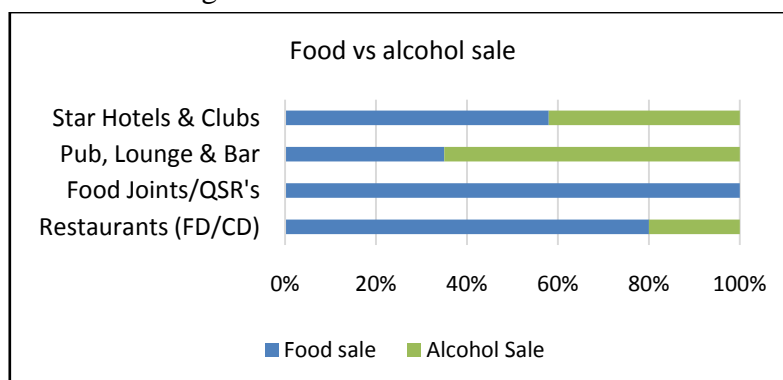
Pubs, lounges & bars have the maximum saliency of alcoholic beverage sales & consumption, accounting for approx. 65% of total sale in a month. These venues were mostly found serving finger food or comfort food, which is rather perceived as an accompaniment along with the beverage. Fine dine & Casual dine restaurants still hold a good share of food sale as they are primarily popular for the food they offer of the respective cuisine or style they market.

In the case of food joints & quick service restaurants, as we know, they only offer food & fast food & there is no alcohol sale out there. It is the five-star hotel which offer a healthy mix of both food & beverage in the supreme luxurious avatar of each, from gourmet food to imported wines & spirits, Banquet events, etc. which maximize the consumption of everything. As per the study, 58% is the share of food sale & 42% is the alcoholic beverage share.

5. Factors affecting the food sale of outlets

- As per the result, more than 75% of the people pick food from their preconceived choices & do not always seek the recommendation of the waitstaff. This results in low suggestive selling & lesser experimentation.

- In the last 5–6 years, there has been a new sector that has developed across major cities & has the highest penetration on metros, i.e. The Cloud kitchens, with an aggressive food delivery service, many people often opt out for these options rather than dining outside.

- Many aggregators such as Zomato, Swiggy, etc. have established themselves as the most preferred food delivery service providers with a fee up to 20-25% per order. Since the home delivery option is only for food & non-alcoholic beverages in Mumbai, this directly impacts the food sale revenue.

- Mumbai has one of the highest Weekend-Weekday revenue gaps. More than 50% of the dining business is weekend dependent, since the city is a hub of working professional &

industries, this shrinks business on weekends, resulting in underutilization of resources & workforce on weekdays.

6. Gender mix of alcohol consumption

Fig4: Gender mix of alcohol consumption in Mumbai
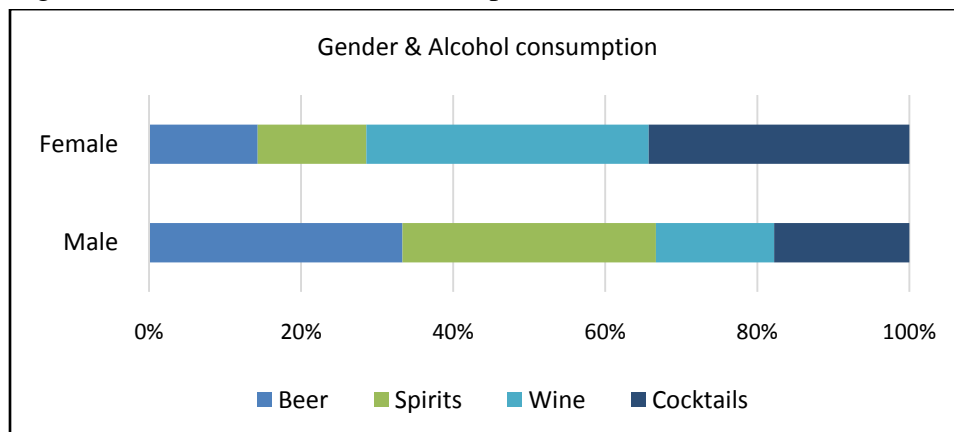
As shown above in Fig 4, with the male group we see a high saliency of beer & spirits, whereas in the female consumption pattern we see wines & cocktails as the first & second preference. The female beer consumption is only 25% against the male consumption of 75%. Moreover, the beer category is on the rise with a CAGR of 18%. The reasons cited for this were rising summer & humidity in Mumbai & beer as a drink is considered refreshing by consumers. The Wine category has also been enjoying a healthy CAGR of 15% in the past 5 years, making it the second-fastest growing category in dining avenues. Female contribution is the driver of growth here, a 65% share compared to 35% of male consumption. A similar pattern is observed in the cocktails' category, where the female share is higher than the males. There has been a steep rise in the male to female consumption ratio in the past two decades, as per studies. The following are the factors affecting this trend –

• The rise in western influence with the increasing per capita & disposable income for both. However, female consumption has increased substantially.

• More Indians have had global exposure in the past two decades, resulting is the social acceptance of wine &dine culture in cities like Mumbai.

• The influence of popular culture, such as music, movies, the fashion world, Mumbai being the home of the Hindi film industry & fashion industry creates a global lifestyle influence.

• Many bars, pubs & lounges were noticed offering happy hours offer & other promotions to entice the consumer for maximum consumption.

• The young demography of Mumbai & the increasing urban population is also a reason behind the rise of alcohol consumption.

• Rising affluence, liberal society, aspirations and exposure to a different lifestyle are also driving individuals to experiment with alcohol.

5. Cuisine Popularity in Mumbai City

Mumbai is a city with a global impression, which can be seen in the food preference of the residents. However, close to 48% of the people still prefer the North Indian style of food, followed by Chinese food which is at 20% popularity. Italian food too has a strong footprint with Quick service restaurants such as pizza huts to fine dine restaurants. South-Indian cuisine is the fourth most popular & but has a share mainly in the breakfast diet of Mumbaikars. Most of the venues serving South Indian food are either casual dine restaurants or food joints.

Fig 5. Cuisine chart of Mumbai dining venues
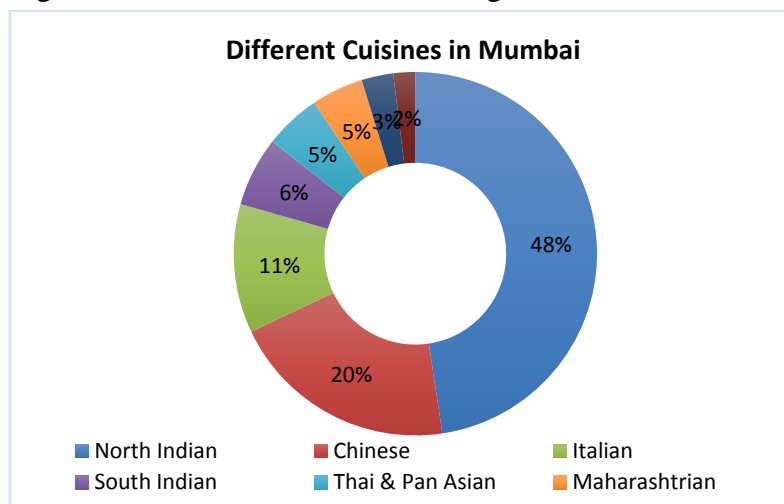
Apart from these, some other international cuisines have also gained popularity in Mumbai in recent years, such as Thai & pan Asian food, Mediterranean, American tax-mex cuisine etc. With the increasing travel influx of Indians & international tourists to India, a lot of international food & trends have made their way to our cities. People were also observed with the tendency to try international cuisine or different food more on weekends than weekdays.

6. Venue Style Preference & challenges

Mumbai city is quite known for its space constraints & hence, real estate & space is congested, this has impacted the eateries & dining establishments as well –

Fig 6 Venue Style preference
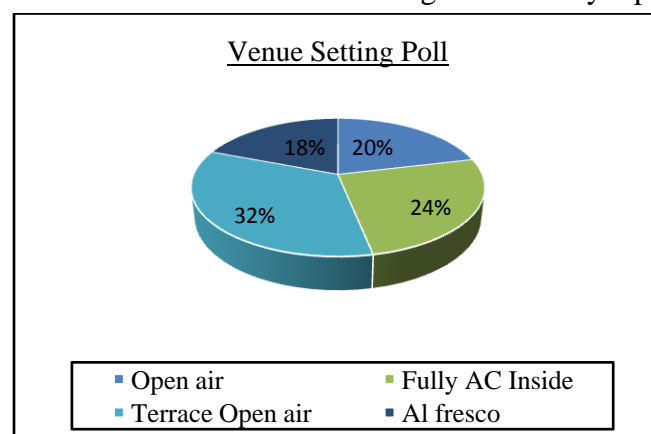
As shown in fig.6, nearly 32% of the interviewers prefer open terraces, another 20% mentioned that they like open air venue, 18% of the people said they prefer alfresco & 24% are those who prefer to dine inside the premises. In comparison, the indoor category is second most preferred with 24% of most people answered hot weather & humidity, a reason for that. In the open-air segment, people specified the garden restaurant as the preferred choice. The licence, rentals, logistics & business all depend hugely on the style of the venue in Mumbai. Processing & obtaining these licenses is a lengthy, extensive exercise.

7. Willingness to pay by different Age group

As per the table below, the age group of Millennials (31-40) & 40 above show the highest spending capacity & willingness, whereas the Gen Z & newly employed of the age group 21-30 are little reluctant on spending. We also notice that individuals of the same group are willing to shell out more, as per the format & venue irrespective of the age group.

Table 2. Willingness to Pay as per Age group

Dining Venue	16-20	21-30	31-40	Above 40
Café / Tea house	50	100	150	150
Quick Service Restaurants (QSR)	75	150	200	200
Dessert Parlour/ Ice-Cream corner	50	100	100	150
Affordable Casual Dining Restaurants	300	300	400	400
Premium Casual Dining Restaurants	500	1000	1000	750
Fine Dining Restaurants	1000	1500	1500	1800
Pubs, Bar & Lounges		1000	1200	1000
Star Hotel & Premium Clubs	1500	2000	2500	2500

8. Eating Out frequency

As per the table below, individuals of each age groups were interviewed to understand the average eating out frequency prevailing amongst the Mumbaikars -

Table 3. Eating out frequency M/F

Age Group	Male	Female
16-20	More than 6 times a month	More than 4 times a month
21-30	More than 8 times a month	More than 6 times a month
31-40	More than 4 times a month	More than twice a month
Above 40	More than twice a month	More than once a month

We observed that the age group between 18-31 contributes to the highest footfall, in which very young adults are the ones paying most visits. These are the individuals who are in college or newly employed. The frequency over all is dominated by male than female but a healthy 60:40 ratio is there in totality. The matured age groups of 31-40 & above 40 in the city have reduced visits but a better spending capacity per visit.

Conclusion

With the implementation of all the three methods of research and data collection, it is concluded that the dining industry & business is majorly influenced by human factors. Consideration of socio-economic factors, lifestyle & food habits, dining patterns & formats, cuisine & cultural influence & human behaviour help us understand the present dining industry landscape of Mumbai

1. Geographical layout, Demography & Urbanisation

It is logical to infer that geographic variables influence the clientele of dining establishments in Mumbai. Outlets which are located in or around business complexes & popular locations enjoy an effortless flow of consumers, whereas inadequate infrastructure, lack of space, parking, expensive real estate remain a concern for restaurants & eateries, impacting the revenue & overall business. Mumbai is densely populated & long traffic hours leads to high footfall in the venues which are in the vicinity of the consumer's work location or residential location.

The dining industry has evolved over the years in the reception of its guest & developed a very organized & systematic way of receiving the consumer dining request, called Reservation, traditionally made with a phone call. However, in the past few years, it is also increasingly happening through digital mediums and aggregators. As per our interaction, close to 60% of the dining happens through reservations in the premium dining venues & hotel channels. The rapid urbanization, on the one hand, gave a boom to the industry, but also made the conditions competitive & difficult in a city which is densely populated. The advantage is Mumbai being of financial & cultural importance in the country. It will forever attract young & aspiring talent from all walks of life to the city. The demographic indicators such as age group participation, gender mix, young workforce, etc. are indeed a promising sign for the industry.

2. Global trends & cultural influence in lifestyle

Right from the beginning, the design, layout & method of food service had western imprints on meals, mainly because this style of dining came along with the colonisation; the table set up for meals, crockery style, dining etiquettes with cutlery[1], À la carte menu & food presentation all have a western origin. Moreover, we see staff uniform, the preferred language

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[1]Indians have used spoons sometimes, but a knife & fork was brought to the table by Europeans. Moreover, even the chopstick trend of oriental restaurants has come to India through the west.

of operations being English, interiors, music played in the venues all carry a great deal of western influence. Global cuisine penetration, a liberal drinking culture & even social get-togethers in bars & pubs, are trends which have come from outside. Some of these observations are also true for Indian restaurants where, at the outset, it doesn't feel any influence, but as we go higher up in the price index &preimmunises these trends are loud & visible. The growing global interaction within the industry is also shaping up a lot of these trends as the market demands the venues to compete & maintain international standards in terms of offerings, facility & service. After studying different formats of dining, F&B consumption & pattern, cuisine's popularity & consumer behaviour, it can be assessed that a lot of changes in the lifestyle & food habits have happened due to the cultural influence on the society through the influx of travel, media & popular culture.

The rise in consumption of coffee, bakery products & confectionary is an indicator of a growing taste for refreshments & desserts of western origin. Also, the rising footfall in coffeehouses suggests that such venues are slowly becoming the comfort outlet & preferred meeting points in a busy town. It can be inferred that with increased global exposure, eased travel & the influence of popular culture, there is a spike in alcohol consumption. What's noteworthy here is the wine & dine trend & increase in per capita female consumption. Similarly, the number of global cuisines available in the market is also an indicator of the same.

Today, Mumbai has a demand & supply of Lebanese, Japanese, Korean & even Latin American food options available for dining. Celebrations such as New Year's Eve, Christmas, Halloween festival are commonly seen in the premium segment of restaurants & outlets. Dining venues have also become the most preferred places for birthdays, anniversaries & other social convivial moments which were not popular earlier.

3. Consumer behaviour

A shift in the eating, drinking, recreation & partying habits of people across all age groups is being observed. Consumers are more and more moving towards experiential & leisure dining with multiple course meals to begin with appetizers, starter, main course & dessert. The average time & money spent by consumer in a restaurant has also increased from the past, and quality of service in the outlet is as important as the quality of food. We also notice that consumers are giving more feedback & interacting more with waitstaff than they have interacted with traditionally.

The music, Décor & interiors of the venue also play a vital role in the overall image of the dining. There are venues which are artistically & diligently designed where individuals just prefer to spend some more time than usual. Venues that provide experiential quotient – décor, experimental food & beverages, better music, etc. are gaining popularity & attracting a lot of young crowds.

Image.2 - Rise of experiential quotient in dining industry
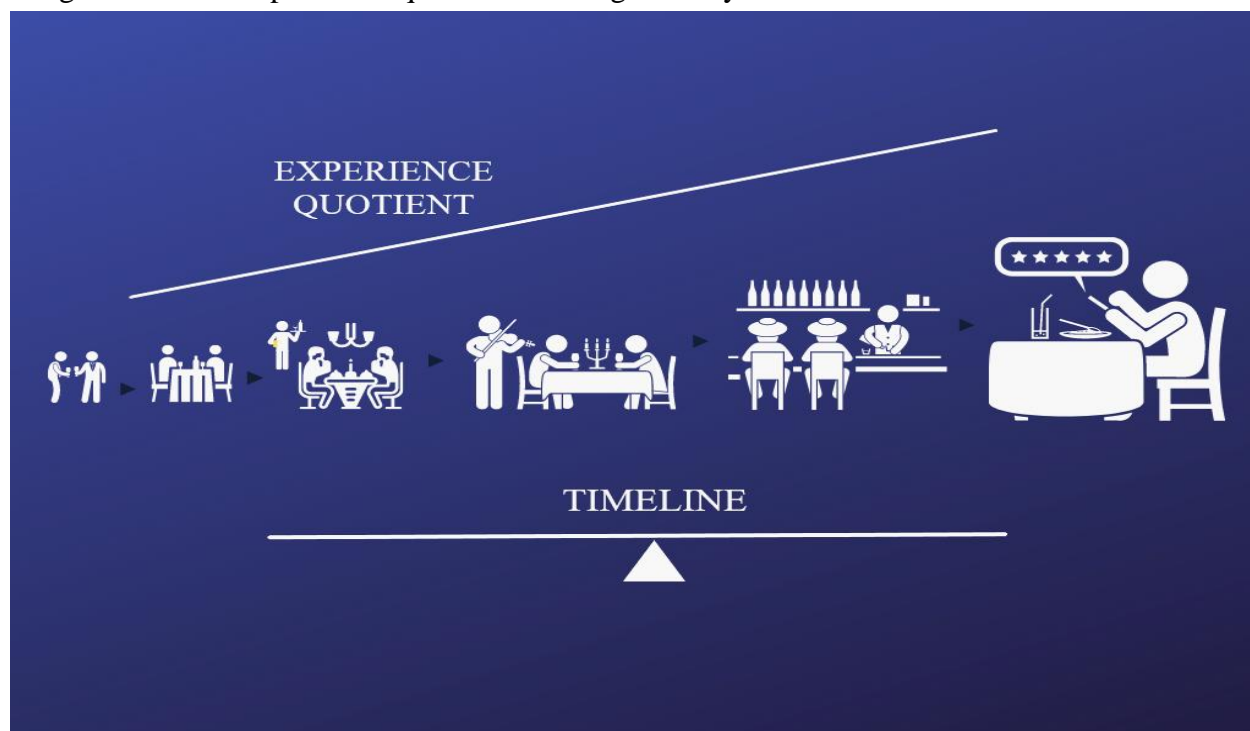
Many venues such as Cafés, fast food joints, quick service restaurants offer a quickly made food & have set consumer expectations a bit high. For a fine dine restaurant, premium dining outlet or star hotels, this remains a challenge as food is mostly freshly made & guest expectations are quick service upon ordering, an average order wait at a fine dine or similar venue is 20-25 mins& consumers often fall short of patience. Apart from the food preparation time, restaurants are also evaluated on the overall quality of service, hygiene of staff members & venue setting. A shift in mindset for clinical hygiene has also emerged post-the covid& consumer is all the more alert.

4.   Technology & age of disruption

Restaurants, on one hand, are moving from manual reservation to digital bookings, digital menus & registering consumer databases. On the other hand, technology is slowly seeping into the operations as well as overall restaurant management. From vendor management software to contactless payment, QR codes, mobile menu cards, online ordering of food, chatbots, restaurant marketing, use of social media in advertisements & promotions etc. Most of these things are in use today in a regular dining venue. Cafés & quick service restaurants such as McDonald's and Starbucks have further automated systems, touch screen point of sale systems in place to ease out the service with minimum chance of error. Technological intervention has helped the outlets not only to minimize manual errors, but also to maximize productivity.

In the last 6–7 years, something revolutionary has happened which has caused major disruption to the dining business - Cloud Kitchen & home delivery. The concept directly impacts the food sale of restaurants as people have an option of getting food delivered at any place, anytime & at a reasonable price. This trend is here to stay & most likely to grow and become a separate vertical in the food & beverage industry. Aggregators are now the indirect food delivery arm of the restaurants. This is directly impacting the food sale of the restaurants & eateries.

Mumbai as a city is witnessing some new trends which are futuristic for dining industry. There has been an increase in the health-conscious consumption of food lately & many such new Cafés & restaurants have sprung up which serve low calories, organically grown & Vegan food. With the growing awareness for sustainability, many existing restaurants are carrying a separate vegan/ Jain menu for consumers which want only a plant-based diet. Open-air terrace restaurants are growing in demand. The social media & tech-savvy audience is the new consumer for maximum eateries & dining outlets, which is assertive, non-conformist & a demanding consumer.

Suggestions
Through this research, we can confidently say that Mumbai's Dining Industry is on a path of growth. However, there are some concerns which need to be addressed. The following are some suggestions to highlight them & push them towards a solution.

• The government & BMC (Brihanmumbai Municipal corporation) need to work towards making the tourist infrastructure better for people to commute with ease & a better environment for businesses. The city is far behind its contemporary cities in Asia such as Dubai and Singapore.

• Authorities need to ease out the licensing procedures for the restaurant industry. The licenses required to start a restaurant are the same throughout India, except in some states like Maharashtra. An outlet needs approximately 12–15 licenses just to open a restaurant each from a government department, e.g., health license, food safety license, police license, No objection certificate (NOC), from the fire department, etc.

• The restaurant industry is highly labour-intensive, but the availability of trained chefs, managerial staff and other support staff is low. Given this shortfall of quality manpower and the industry's high attrition rate of 20-25%, the cost of labour is high. To bridge the demand and supply gap, players are currently hiring in huge numbers and increasingly investing in in-house training programs. People in industry need to address this issue of human resource & skill development.

• As we know, more than 85% of the total dining establishment are on rented premises in Mumbai. For food outlets, real estate (rentals) is the major cost component after raw materials and accounts for 12-15% and sometimes even 20% of total revenues. Authorities & restaurant associations need to address this issue collectively.

• Mumbai and the diverse ethnic backgrounds of the people, comprises consumers with varied needs. The ever-changing needs of the consumer make it difficult for players to classify consumers into segments and create offerings accordingly. It is thus mandatory for players to constantly adopt newer tools like consumer analytics, conduct research, to understand consumer behaviour and innovate constantly for effective business operations.

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