

A Study on Emerging Trends in Food & Beverage Services Retailing in India

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ABSTRACT: The Indian Food and Beverage Services market is expanding rapidly. The compounded annual rate of growth is expected to be 25% and will continue to grow with similar pace in the next few years. The overall scenario of the F&B market has evolved over the few years. There was a time when handful of brands was available in the market to eat out. But today, the customers are spoilt for choices. We have witnessed immense activities in F&B Service's industry in the last 5 years, including exciting new concepts, food and beverage offerings and new and innovative service elements we have also seen increased interest in the investment circle for this segment with some big investments deals taking place in the recent times. Therefore, what are the emerging and current trends in the F&B Services industry how will people eat behave and be served in coming years in this document we look at some of these foreseeable trends that will become part of the everyday life soon.

KEYWORDS: Trends, Restaurant, food and beverage, cuisine,

I. INTRODUCTION

Transformation of cuisine

The way forward is likely to be an adoption of both lesser known Indian flavors from the Himalayan and tribal belts as well as other international cuisines. While South Indian, Punjabi and Mughlai cuisines tended to dominate the Indian offerings, there is now also demand for such dishes as Andhra Chicken Pepper Fry. Similarly, Bhutanese, African and Korean cuisines can also find acceptance among customers. Thus, there is opportunity for F&B players to mix the traditional and new Indian flavors while offering both individually. Further, while a niche segment may be created around specific international cuisines, customization may be needed to ensure that they suit the Indian palate.

Despite India's great tradition of food, eating out was not as common as in the West until recently. Now, eating out is a regular form of entertainment, especially in the metros, mini-metros and Tier I cities, driven by rise in income, greater number of nuclear families and working women, and urbanization. Focused marketing by brands, with more emphasis on the menu, is also attracting customers, as is the dissemination of culinary concepts and preferences through print and television media. Closely linked to these developments is the transformation of cuisine from simple and familiar offerings to a menu that offers diversity in taste, style and origins.

At the customer end, a greater willingness to experiment with novelties, exposure to international cuisines, and a fast-paced lifestyle have contributed to changing cuisine preferences. Ingredients like truffles, artichokes, asparagus, Australian lamb, Norwegian salmon, black bean sauce etc. have found their way to the Indian F&B space. Blending of cuisines, e.g. Italian with Thai is another customer choice. The trend is increasing for customers to choose cuisines that reflect their lifestyle, and in the process reject the traditional options. Consequently, industry-side trends are also changing, with international players also entering the arena. Even casual dining players are prepared to provide such flavors as quick Chinese, raw and rustic Italian, fine French, convenient American, etc. which were once specialty and fine-dining dishes. On the other hand, customers are also being wooed with "street food" options served in a hygienic setting and good ambience. Another industry innovation is the dual format, e.g., café + bar, café + grill, bar + lounge, etc. While these give more choice to customers and can also make more profits for the brands, they need to be clearly positioned to avoid any confusion in the

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customers' minds. Multi-cuisine restaurants, which offer a non-specialized feel, are however losing ground to specialist players with customers willing to pay more but unwilling to compromise on quality.

II.OBJECTIVES

Evaluation of beverages as a game changer

Most people in India are exposed to a variety of beverages from an early age: mothers serve homemade milkshakes, sharbats, chocolate drinks etc. However, beverages are themselves only a “sidekick” and at best served as fillers in-between meals. Given this backdrop, the recent surge in the Indian beverage segment is exciting and can open up many retail opportunities. This emergence began with the introduction of coffee chains more than a decade ago. This was also a first in terms of organized beverage retail, since the segment was earlier dominated by small local players like juice shops. Also, restaurants which focused solely on food have also added/expanded their beverage offerings. This has boosted development of both alcoholic and non-alcoholic beverages at both product and retail level.

III.NON-ALCOHOLIC BEVERAGES

This segment primarily comprises coffee, tea and aerated drinks. In the past few years, coffee has become a fashion statement among the young and upwardly mobile. With both Indian and international coffee chains mushrooming across the country, cafés are playing a key role in tuning customer preferences and also creating a retail space. This growth has also prompted bigger international brands like Starbucks and Dunkin' Donuts to foray into the Indian market. Interestingly, the development of the coffee segment is set against the backdrop of India primarily referred to as a ‘tea-drinking’ nation with the per capita tea consumption of 0.75 kilos per annum being almost 10 times the per capita coffee consumption. The tea segment, despite a surge in opportunities, is presently at a stage similar to that of the coffee segment a decade ago. However, consumers are keen on trying out new variants such as flavored and herbal teas, and further, understand the products' novelty and are willing to pay a premium price. Growing awareness of the health benefits attributed to tea is another factor driving the expansion of tea-based chains like Chaipatty, Passion – My Cup of Tea, Tapri, Infinita, Chai Point, Tea Junction, Tea Pot, Tea Center, Cha Bar, and Wagh Bakri Tea Lounge. A further push to the tea segment comes from introduction of tea options by leading coffee chains. Brands are also experimenting with other beveragebased formats, e.g. juice bars, especially in high footfall areas like airports and office complexes. Such brands as Booster Juice and My Orange cater to an increasingly health-conscious population through easy-to-access locations. This has also added to the overall development of the non-alcoholic segment.

IV.ALCOHOLIC BEVERAGES

The rising popularity of alcoholic beverages, especially among youth, can be attributed to dramatic lifestyle changes which, in turn, are fueled by rising income levels. The entry of international brands is also a factor for “social” drinking at get-togethers, which was once considering a taboo in India. The youth however prefer lighter spirits, due to which such white spirits as vodka, rum, gin and tequila are seeing growth. Given that the segment on the whole was undergoing innovations even prior to the development of F&B retail formats the emergence of new formats has given a further boost at both the product and retail level.

At Product Level, there is a shift in preference from classical cocktails and straight drinks to using signature spirits and personalized mixes. Infusion of flavor into spirits, e.g. tea in vodka, chili infused wine, is also becoming popular. Cafés and casual dining chains like Café Coffee Day, Barista and Pizza Hut are also trying to cash in by offering beer and wine, with wine in particular gathering momentum – wine drinking is consistently growing at 20% to 25% per annum. Many Indian and international winemakers have run promotions and programs to educate the Indian consumer in the past few years, resulting in increased sales not only in Metros and Tier I cities, but also in Tier II cities. Another innovation in products is the introduction of diet versions of beer, vodka and whiskey by United Spirits Ltd. to cater to health-conscious consumers.

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New lounge formats and microbreweries are among the Retail Level developments in the alcoholic beverages segment. While new formats provide an avenue for showcasing an eclectic mix of beverages, microbreweries reflect an attitudinal shift towards consuming freshly brewed beer. There are also places which combine beverages with sports, e.g. Howzatt which offers both beer and cricket. Increasing awareness has also resulted in launch of exclusive formats such as the Delhi Wine Club for wine connoisseurs. Going forward, brands are expected to focus on the beverage segment, which offers high margins and also a point of differentiation from competitors. However, such factors as complementary food, ambience and engagement activities will also be crucial in determining the vitality of the business model and will help in creating a niche for this segment.

Increasing Infusion of Entertainment in F&B

The development of the organized F&B market in India has taken time, due to which brands are still focusing on getting the fundamentals menu the service in order. Despite this, growth in the market has resulted in a shift towards customer engagement at the dining space through different means. As a result, F&B brands now operate in two main spaces Brands which were established as F&B players have introduced entertainment-driven elements Brands which were primarily entertainment oriented, with F&B elements as add-ons. E.g., Sports bars, bookstore cafés By adding entertainment options, F&B brands give customers another reason to spend more time at the dinner table, thus improving the average spend per visit. While some forms of entertainment are offered free of cost for instance, live music others games such as snooker require some additional payment. Further, with increasing competition and fast-growing markets, F&B brands need to create an opportunity to differentiate them from other brands. Traditionally, restaurants were rated in terms of theme and ambience now offering varied entertainment one benefit of such extras is the buzz it can create among customers, who then become an alternative marketing tool by spreading the word about the F&B brand. This 'talk value' is vital for brands as their customers are also passive advertisers. Brands which host musical events, for instance, may also capture indirect media attention

Through such customers. However, the onus is on the brands to ensure higher consumer interaction and engage younger consumers, who are more likely to seek such venues as "hang-outs" and visit frequently. Brands also have to make a studied choice in terms of these bonus offerings, which are limited in number and have different levels of appeal among customers. Music is generally the strongest crowd-puller, and positively impacts a restaurant's business, image and customer experience. It can be offered variously through live performances, as songs played on request and karaoke. Blue Frog, The V Spot Cafe Bar and Hard Rock Café are some examples of successful players offering music. Another entertainment choice is Comedy, which gives customers a much-needed 'laughter break' in a stressful

World. This has been successfully adopted in the West, but is still novel to India, with The Comedy Store, Bombay Elektrik Project and Kyra the pioneers here. Also attracting a good number of customers are Sport offerings, with themed outlets cashing in on the popular love for football (soccer), cricket, Formula 1 racing, etc. Players in this space include The Manchester United Café Bar, Delhi Daredevils Sports Bar and golfworx. One relatively new option which is still being explored is Art & Literature. It's connection with the F&B space is not well understood, and thus the existence of only a few players Such as Mocha art house and Indian Art Café, which encourage art and art appreciation, and places which provide books to read for customers, like Café Turtle. Going forward, the need of the hour is to find unique ways to engage the consumer in ways that ensure a long term relationship between the brand and the consumer. The primary goal in this space is creating excitement for the consumer and giving them more than they asked for in terms of beyond-the-palate, entertainment options in a bid to encourage repeat visits.

V. NEW EXPANSION OPPORTUNITY

India's growth is seen not merely in big cities but also in smaller towns. Further, there is tremendous growth across sectors, which has created deeper pockets. The F&B sector is also booming, thanks to the new middle class wishing to taste different cuisines and also due to the youth looking to emulate the Western lifestyle. Thus, F&B brands have an opportunity to

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consolidate in the metros and also foray into smaller cities and towns. The lack of uniform economic growth meant that quick service restaurants and cafés were largely located in northern, southern and western India. The National Capital Region, or NCR, of Delhi alone has 408 franchised brands, according to a study, while western India has 386 brands with the majority concentrated in Mumbai. In southern India too, the 250 brands are mostly split between Bangalore and Chennai. In comparison, eastern India has a mere 58 brands, largely located in Kolkata. On the brighter side, there has been a spurt in economic activities in this region in the recent years. For instance, automotive manufacturer Maruti registered a 40 percent year-over-year growth in West Bengal and Orissa in the nine-month period ended December 2010, and also posted an improvement of over 30 percent in Bihar, Chhattisgarh and Jharkhand. Such indicators reflect the rising demand for improved lifestyle options. With the services sector also recording exponential growth in the past five years, a number of banks, insurance providers, telecom and IT companies have come up, bringing fresh investment, projects and new employees to the eastern states. The interaction between the locals and the migrants help locals become aware about branded Indian and international food chains. Further thanks to the introduction of special tourist circuits, e.g. the Buddhist Circuit in Bihar, there is an influx of both domestic and foreign tourists. Thus there is an opportunity for a variety of F&B brands, in various formats. Players in this space have already begun to cash in on this – Café Coffee Day, for instance, has spread into Bihar, Jharkhand and West Bengal, while Barista operates in Kolkata. Smaller cities like Patna, Guwahati and Ranchi are also coming up on the radar of F&B brands. Evolving consumer needs have also contributed to the growth of niches within the F&B sector. Initially their sensitivity to price made the 25 to 40 age bracket the core target for F&B brands. With consumers now desiring customization and showing a willingness to experiment and indulge themselves, F&B brands need to reposition according to customer lifestyles and aspirations. Health conscious customers are one such segment for such F&B brands as Soya Express. Restaurants have also introduced themes and entertainment options to suit patrons who are looking to have a “good time”. Eating-out is also trending in smaller cities as a result of lifestyle changes, viz. increase in disposable income, greater number of Working women, etc. Again, consumers are switching loyalties from tea stalls and roadside eateries to more hygienic dining options which have better service options, despite the higher expense involved. Improved transport options have created new retail avenues at airports and metro stations and along Highways. In the West, it is common to see quick service restaurants and cafés along freeways, unlike India, where are only unorganized players like dhabas. This opportunity for F&B brands is accentuated by consumers focusing more on hygiene and quality. The high footfall and captive customer population at railway and metro stations and airports has resulted in a mushrooming of F&B brands in these locations. There is also more demand for “to go” food options at transit locations, offering another window for F&B players. Rising income levels and changing lifestyle has given the F&B sector a chance to expand and tap new markets. Going forward, higher retail presence is one way of exploiting this opportunity, while creating niche segments is another. The sector is also expected to expand its presence at transit locations.

Understanding the f&b consumer better role of analytic

The Indian F&B sector continues to invite huge amounts of investment and still sees high growth and opening of new chains at a rapid pace. Established players in this space also need to consolidate and expand in order to keep pace with competition and changing consumer behavior and choices. These brands will need to “understand” the consumer as not merely being a bill value or table number and further, manage the transition in a systematic way, with adequate oversight. Embedding analytics into a business process can help F&B brands in this process. Understanding the customer requires knowing what they buy, when they buy, how they buy by analyzing customer data at both an overall and segment level. This analysis can require devising elaborate mechanisms for data collection, or, minimally, can be based on Point of Sale, or POS, data. In the F&B sector, ‘Trip Segmentation’ is popular as it helps understand the kind of meals customers expect for example customers who only order single items dubbed Solo Trips may be willing to buy another item if it’s offered as a combo with their usual item, thus boosting sales. Another possible segmentation focuses on time of the day to see which offerings can be offered at specific times as per customer choices. This also helps in kitchen management with the restaurateur being aware of what orders to expect at what time. Continuing the solo trip example, it might be that such items are most in demand between 3 pm and 6 pm on weekdays, and so offering combo items during this duration offers

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maximum potential for the restaurant to maximize sales Analytics can also help in building a loyalty strategy, which is, surprisingly, rarely found in the Indian F&B

Sector despite a high probability of repeat visitors. Loyalty programs need not be cash-heavy, or involve Plastic cards and heavy discounts. They can also involve understanding the customers' buying habits through tracking their purchases by example asking for their personal question while making a seat reservation or while billing and rewarding the customers suitably in small ways. An open communication channel, with incentives to promote frequent trips, and a personal rapport with the customer can also be helpful. instance if the customer's favorite starter or wine is known, the waiter can serve ask to serve the same, thus creating an instant connect with the customer F&B brands also need to devise a pricing strategy in a well thought-out manner as price changes should be carried out strategically and only after analyzing the impact thereof Implementing such a strategy also needs care during both the pre-price change period when the brand decides which products prices need to be changed and post price change period when the impact of the price change is measured. For example, it is possible that certain menu items can be premium-priced without adversely impacting sales while others are highly price sensitive Also while reducing prices can be intuited to impact sales positively it may happen that decreasing the price of an item results in lower sales due to a perception that the lower price implies lesser quantity Broadlyspeaking brands should only marginally change pricesof price-sensitive items, but can increase prices of itemswhich are bought by up market customers Introducingprice trials to check price sensitivity can be helpful Developing a menu strategy is another area whereanalytics finds a role a famous example in the retailsector is the analysis that stocking beer adjacent to nappiesresulted in higher sales. The F&B sector's analogue ofsuch "product bundling" is menu mix, e.g., McDonald'soffering fries and a soft drink in combination with itsburgers. Such a "combo" reflects the restaurant's analysisof, and response to, customer preferences, and alsoimproves customer service efficiency. Also, customerspay less for such a combination as compared to the priceof each item individually and thus find "value" in buyingthe clubbed offering. On the flip side, too many comboofferings can end up confusing the customer Menus can also be analyzed from the perspective ofincentivizing customers for purchasing their favoriteproducts, which would encourage repeat visits and buildloyalty. Further, analytics can help in product trialsby mapping the acceptance of the new product andcompare it with the sales of similar products to gauge its success Thus investing in analytics can help F&B brands developa robust database which is useful for developing businessstrategies. Given the current inflationary scenario analytics can help eliminate errors in understandingcustomers which can be crucial when contemplating growth and expansion.

Social media relationship with consumer

The advent of social media as a marketing tool has seen companies from every consumer-driven segment rush to adapt to the new phenomenon. In a "reach out or lose out" world, it is no surprise that F&B brands have also entered into the social media space. Further, irrespective of their individual offerings, the brands all need to converse with the consumer the better this "conversation", the greater their share of the pie the reach of social media primarily covers the age bracket of 13 to 34 years, which overlaps the core target segment for F&B brands. The leading social media channel, Facebook, alone has a total audience of 45 million people in India with 90 percent in the 13 to 34 years range. Through Facebook, and other popular channels like Twitter, Foursquare and blogs, brands can gather reviews and dispense loyalty incentives. However, social media is not an ideal channel for fine dining brands which have affluent consumers in older age groups, as this might impact their exclusivity and brand image. Even brands that do have, say, a Facebook page (e.g., Bukhara, Olive and Lodi-The Garden Restaurant) do not leverage it currently Broadly speaking, F&B brands see social media as either a core marketing channel or as a support for traditional media. For brands which do not use traditional media to communicate with consumers – Café Coffee Day Hard Rock Café, Mocha etc. – social media helps gain visibility and generates "talk value". McDonald's, KFC, Pizza Hut and Dominos Pizza use social media in addition to traditional media to connect with consumers and continuing being the "top of the mind" options Social media is often seen as a Touch Point, allowing brands to inform consumers about existing and new products store openings, media coverage, and promotions and offers. However, such communication varies from brand to brand especially in terms of content and presentation. For example, while both Café Coffee Day and Pizza Hut advertise products through Facebook, Café Coffee Day changes product

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pictures, while Pizza Hut plays around with captions Also, with such channels as Twitter, the clarity and relevance of the communication is crucial to ensure better reception In this respect, while Hard Rock Café focuses on music, Dominos Pizza promotes offers and discounts Brands also use social media as a tool for Open Communicationare consumer-initiatedrather than brand controlled This Trend is being adopted by some of the brands, e.g. Dominos Pizza and Hard Rock Café, which use blogs as anotherplatform for reaching out to consumers The use of social media to promote Incentives is presently limited to a few brands and certain social media channels For instance, consumers receive incentives through Foursquare by means of “check-ins”. Café Coffee Day pioneered this initiative in 2011, by rewarding every 3rd customer who checked-in at Café Coffee Day through Foursquare with a 15 percent discount. Further, a consumer who was a “Mayor” on Foursquare received a free coffee, besides a 20 percentdiscount on every 3rd check-in. Incentivizing consumers is yet to take-off in a big way and is a future opportunity tobe grabbed through Face book and TwitterA Look at How F&B Brands Stack Up Across Popular Social Media ChannelsThe social media presence of F&B brands and their level of engagement on Facebook are discussed in Table 1 below The channels’ appeal among the youth is reflected in the statistics, and thus, if an F&B brand wants to be seen andheard through a social media channel.

F&B Brand	Number of Facebook Fans	Avg. no. of postper month	Avg. no .of interaction per month
Pizza hut	1,561,035	35	24,100
Dominos	1,090,198	75	45,000
KFC	7,73,248	NA	NA
Mc Donald’s	139,544	NA	NA
Barista	42,962	24	1150

Sustainability gaining critical importance in f&b

Sustainability, which encompasses health, environmentaland societal trends, is slowly getting incorporated intothe Indian psyche. Both consumers and businesses areincreasingly conscious about their carbon footprint with businesses charting the complete route of alltheir products and services as a controlling measure A desire to reduce operational costs, changing investorattitudes, emergence of corporate social responsibility or CSR, programs, and increased regulatory focus onfacility operations and development is also driving thesustainability trend While there is still need for more awareness regardingsustainability, certain initiatives like use of organicand locally sourced food and adoption of healthierfood options are gaining momentum there are alsoactivities such as Indian restaurant chain Nirula’s collecting squeezed lemons planting them in plasticcups and distributing the same to customers in a bidto promote recycling and planting trees However the lack of understanding and appreciation prevents“green” restaurants both from charging premium pricesto compensate for their environmental efforts andfrom reaping any benefits to their brand image wideradoption of sustainability practices requires that suchexercises should be financially viable and have a positive Impact on the restaurant’s operations focus Areas in Sustainability the use and conservation of energy is one area whererestaurants can contribute to sustainability and also saveon costs. Attempts to cut down on energy costs havehowever been limited to the front-end, whereas the foodpreparation area accounts for 60% – 80% of energy usagein the form of heating, lighting, refrigeration and air conditioning Also kitchen equipment is often neitherefficient nor environment-friendly, and there are limitedgovernmental regulations in this respect even existingnorms like the BEE guidelines are not mandatory for the restaurant business while such environment-friendly equipment as computer controlled fryers, ovens and refrigeratorsare available in the international markets their cost especially with the addition of import duties is too steep for smaller and unorganized players Construction of restaurant buildings can also contribute to energy savings “Green” residential and commercial In malls and shops plastic bags are being replaced by paper bags Some government policies helpfurther such practices, but there is need for stricterregulations relating to recycling practices to be observedby F&B businesses. Restaurants need to switch to usingrecyclable paper and packaging and cut down on usage

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Of plastic crockery and cutlery also rising in prevalence is the use of fresh organic food and ingredients with India among the top ten countries in terms of demand for such food. Though organic food is not a part of consumer's daily diet due to its higher cost restaurants are however focusing on developing backend teams to access organic ingredients. The bottleneck again is awareness, with customers not knowing the difference between organic and non-organic food but with more education, organic and locally-grown food could find emphasis with restaurants seeking to create a premium aura and differentiate themselves from rivals Corporate Social Responsibility, or CSR is another emerging trend among F&B brands as CSR initiatives help in enhancing brand image and have value in international markets. In India, restaurants have hired specially-abled and impoverished people, e.g., RJ Corp employs over 450 specially-abled people across India Café Coffee Day also employs about 90 people with hearing impairments. Encouraging government policies can give a further boost to such efforts going forward intensive and far-reaching educational programs can be useful in promoting sustainability initiatives governmental measures, including grading restaurants on their "green" efforts and providing tax benefits/ subsidies, can also be helpful Further F&B brands need to implement sustainable systems at both the front- and back-end, in pioneering ways if needed.

Growing importance of grading system

Grading restaurants highlights their distinctive features while giving customers greater clarity about the offerings. It also gives restaurants valuable feedback, helping them improve their standards This practice began in 1900 in France, with the manufacturer Michelin establishing a guide to evaluate restaurants. Over the years, this guide, based on the feedback of qualified inspectors, is an important aid in improving the overall quality of restaurant food. A similar system used in the UK was pioneered by its Automobile Association and awards Rosettes instead of Michelin's Stars another system based on actual reviews by customers rather than inspectors India presently lacks a standardized system by which restaurants can be rated. Growing consumer discernment and increasing F&B prices also necessitate a transparent and credible grading system this has resulted in the launch of review systems like Zomato.com and Times Food Guide However, these are nowhere near as well established or reputed as the Michelin Guide. An official grading system exists in Mumbai (vide the Mumbai Shops and Establishments Act of 1948) and rates restaurants on the basis of seating, general hygiene, air conditioning, location of restrooms etc. However these ratings are seen as being obsolete and largely ignored Food and restaurant-related awards such as the NDTV Good Times Award and Times Food Guide award, adjudged by critics employed by the sponsor media agencies, are also controversial since there is no official validation by government agencies. Certain restaurant review websites such as Zomato.com and Burrp.com post details about restaurants and provide a platform for customers to upload reviews and feedback. There is thus a lack for an independently audited grading system, preferably based on reviews by renowned food critics as well as consumer reviews in rating a restaurant, the most crucial factor is Quality of food which includes not just the final product but also the ingredients used and their sources further creativity and innovation also come into play given that customers are looking to experiment with cuisines the presentation of the food can win instant approval from customers and also accentuate the taste of the dish Additionally a restaurant's Quality of Service is also vital, with servers required to be polite knowledgeable pleasant and smartly-dressed Since customers often make a dining choice based on the overall ambience this is another criterion in ratings The décor, theme, lighting and seating in a restaurant not just set the mood for diners but can also help classify the restaurant as being premium or casual from the customers perspective pricing is a major consideration and therefore must be factored into reviews customers are always looking to get proper value for their money which makes their feedback decisive in any price-based rating thus a uniform grading system that incorporates these factors is very much the need of the hour apart from creating a transparent and unbiased rating system regular updates of the same are also needed to ensure validity and relevance

VI. FINDING AND CONCLUSION

India's leading hospitality service management firm with more than 20 years of experience in working with organizations across consumer food and beverage services founded on the principle of concept way to serving to the consumer

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opportunities provide the tourism sector and hospitality solutions to their key challenges and help them create a high growth of business models, we have the ability to be the strategic advisors with customized solution which are industrial and intuitional catering, hotels and motels Tourism sectors Our key services oriented with Business Strategy based on consumer Performance Enhancement industry & management operations of our business.

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