

Disrupted dining: decline of the premium food services segment in India due to the COVID-19 pandemic

Kishore Thomas John^{1*}  & Rejikumar Gopalakrishnan² 

¹Department of Management Studies, Indian Institute of Technology, Chennai, India

²Amrita School of Business, Amrita Vishwa Vidyapeetham, Kochi campus, Kerala, India

*Correspondence: f13kishoret@iima.ac.in

ABSTRACT: This review article analyses the premium "fine dining" segment of the Indian food services sector, examining trends during the COVID-19 pandemic. Specifically, we discuss the challenges encountered and initiatives taken in response to the global coronavirus outbreak. Using secondary data from market research agencies and government reports, the future of fine dining is conceptualised, supported by academic literature. Our analysis found that the fine dining segment has been shrinking since 2015, with slower overall growth rates than all other segments of the hospitality industry. The augmentation of fine dining restaurants with food delivery services, apps and aggregators is transforming the essence of the sector and foreshadows an ambiguous future. This study of contracting food services in India will aid practitioners studying the challenges and opportunities of this evolving market and how to adapt to a "new normal". The article contributes to the literature because there are few studies of fine dining in India and research on the impact of COVID-19 on food services is still under development.

KEYWORDS: fine dining, food services sector, dining behaviour, sectoral transformation, COVID-19 impact

Introduction

Until March 2020, the tourism and hospitality sector in India enjoyed uninterrupted growth that underscored its economic importance both in terms of employment and financial returns (Federation of Indian Chambers of Commerce and Industry & PwC, 2018; India Brand Equity Foundation, 2020; Jones Lang LaSalle, 2020). As the third largest earner of foreign exchange, it was called the "sunshine sector" (Tiwari, 2019). India's tourism and hospitality sectors were collectively valued at USD 117.7 billion in 2014 and projected to become USD 418.9 billion by 2022 (Prasad & Singh, 2017). Despite the hotel and restaurant industry's overall share in India's GDP being only 1.5% in 2016, its contribution to employment was 8.7% (projected to become 9% by 2026), with valuations forecast to grow to USD 39.8 billion in 2020 from USD 28.1 billion in 2016 (Deloitte & Confederation of Indian Industry, 2017). The COVID-19 pandemic has, however, disrupted these upward trends.

India's tourism and hospitality sector had previously proven its robustness, resilience and adaptability to change (in contrast to core sectors such as infrastructure and manufacturing) despite disruptions such as the demonetisation drive of 2016, a ban on liquor sales along state highways, and the introduction of a goods and services tax regime (Kansara, 2019a). The food services sector was particularly robust until the coronavirus outbreak, posting year-on-year growth of 10% and a compound annual growth rate (CAGR) of 8.4% from 2013 to 2018 (Kansara,

2019a). Rating agencies projected the value of the industry to be 5.5 trillion Indian rupees (INR) by 2022, with an expected 10.4% CAGR for 2018 to 2022 (*Moneylife* Digital Team, 2019). The fine dining segment was the only exception, with slower growth and a reduced market share projected.

This article examines the impact of COVID-19 on food services in India, specifically fine dining, aiming to understand how this segment might change in the post-COVID era. Our perspective incorporates concepts in service marketing and consumer behaviour by amalgamating industry data with the theory of progression of economic value (Pine & Gilmore, 1998). Customer experience as the value offering becomes the pivot of differentiation. Secondary data are employed to suggest a significant decline of this segment in its existing form in post-pandemic India.

Restaurants and COVID-19: literature from academia

COVID-19 ushered in an era of the "new normal" (Ginty, 2020; Papageorghiou, 2020). With hospitality in crisis globally (Dube et al. 2020), Sedov's (2022) study found that restaurants with lower ratings or closer to city centres were more likely to permanently shut down. Brizek et al. (2021) suggest that this era will fundamentally redefine and redesign dining spaces, transforming social interactions, focussing on safety and convenience, designs that emphasise restraint and simplicity, and materials for utensils and cutlery with anti-microbial

properties. Kim and Liu's (2022) study on social-distancing measures and purchase intention at restaurants discovered that promotion strategies no longer influenced purchase intention as they did pre-COVID. In the American context, Byrd et al. (2021) studied consumers' risk perceptions, revealing that consumers felt that food served in restaurants posed a high risk, while not being too bothered about contracting infections from the food itself. Dining in was also perceived to be riskier than takeaway or delivery. Neise et al.'s (2021) study of crisis resilience in Germany found that deliveries and takeaways were coping strategies that only partially recovered losses from reduced in-house dining. Kim and Lee's (2022) research on dining spaces found that customers preferred private tables and rooms due to the prevalence of the virus. Brewer and Sebby (2021) showed how online ordering became essential in the post-pandemic period, advising restaurants to focus on online service alongside dine-in services to remain competitive. Tuzovic et al. (2021) showed that consumer dining experiences as well as comfort levels in the company of other diners were impacted by public health regulations alongside social distancing measures. Choice of restaurant, overall dining experience and revisit intentions were all influenced by domains of personal well-being at the macro, meso and micro levels (ibid.).

More specifically, in the context of fine-dining, there have been several novel findings globally. Some of these studies related to health risks. For example, Chang et al.'s (2021) study found an increased risk of contracting the coronavirus and respiratory infections from airborne particulate matter in open-plan kitchens and full-service restaurants offering grills and frying (as in most fine dining setups). The findings underscored the need for major design alterations and the implementation of safety mechanisms. Zhang et al. (2021) studied infection spread and found that enclosed restaurants or poorly ventilated dining spaces significantly increased the risk of airborne viral transmissions. This risk would be amplified in fine dining with typically longer dining periods.

Numerous studies also examined consumer behaviour in the context of fine dining and COVID-19. Lim et al.'s (2022) study showed that diners gave more importance to food quality, hygiene and price. Sun et al. (2022) identified hygiene practices to be of utmost importance to customers, with altruistic activities (donations, social relief) benefitting marketing and branding. Kim et al.'s (2021) study on restaurant financial viability in the Chinese context suggested that fine dining would be transformed due to pandemic restrictions, with these establishments resorting to delivery to sustain sales in a period of diminishing consumer sentiment. The study also identified adaptations in areas such as packaging, portion size, recipes and delivery technology. Dedeoğlu and Boğan's (2021) study of upscale Turkish restaurants suggested that emotional adversities from the prolonged effects of the pandemic would motivate visits to these establishments for socialisation, emotional recovery and psychological revival. The strongest intentions to visit were seen among consumers who had low risk perceptions. Consumers' desire to maintain a social image by visiting upscale restaurants was influenced by risk perception. Furthermore, it was found that trust in the government significantly impacted dining-out behaviour. Concurrently, Vo-Thanh et al.'s (2022) study on the digitalisation of French fine dining restaurants listed services that ought and ought not to be digitalised, given the experiential nature of the sector. Digitalisation was

recommended for booking services, live video kitchen feeds, mobile apps, payments, recommendation and user-feedback systems, and live tracking technology for diners. Yang et al.'s (2021) study — specifically involving restaurants in luxury star hotels, typically fine dining — showed how delivery services could become a long-term strategic pivot for weathering the pandemic. Online ordering would still be needed to provide luxury dining experiences for customers. The lack of a dining environment to fulfil the experience might result in online sensory substitutes such as elaborating on food culture and ingredients, demonstrations of preparation and methods, advice for home replication experiences and optimum consumption tips for enhanced satisfaction. The same study also specifically highlighted that customers' experiences of deliveries was influenced by packaging and the courier, with both presentation and hygiene of food being important. Further, the study asserted that for the best possible experience, it was imperative that hotels exert tighter control of the delivery process and, therefore, the delivery partner. Customer service would be paramount in the delivery scenario to maximise the influence of hotel staff on stay-at-home diners, for complaint handling and other challenges (Yang, 2021).

How did COVID-19 impact the Indian restaurant industry?

India imposed one of the world's most stringent lockdowns from March 2020 following the outbreak of COVID-19 (Gettleman & Schultz, 2020), which was also extended considerably (Singh, S. G., 2020), simultaneously catapulting the restaurant industry into severe crisis (Mondal, 2020). The National Restaurant Association of India (NRAI), a consortium of over 500 000 restaurants, projected a national loss to the industry of two million jobs and USD 10.5 billion (Lal, 2020). William Drew, content head of *Asia's 50 Best Restaurants* list (<https://www.theworlds50best.com/asia/en/>), underscored the unique and exigent nature of the crisis facing the hospitality sector, particularly in the fine dining segment (Servando, 2020).

The hospitality sector's crisis was severe (Mishra & Vishwanath, 2020; Press Trust of India, 2020a). The extended lockdown prompted the NRAI to appeal to the Finance Minister for relief measures such as a moratorium on rents for six months, input-tax credit, low-interest finance and other handouts, stressing the industry's serious liquidity crisis. The NRAI also requested financial support through the Employees State Insurance Corporation (ESIC) scheme, as about five million of the total 32 million beneficiaries nationwide were from the restaurant industry alone (Lall, 2020). Restaurants generally had only 16 cash buffer days when they could manage expenses without any income, with typically 10–15 per cent of earnings before interest, taxes, depreciation and writing assets off (ETCIO, 2020). The Federation of Hotel and Restaurant Associations of India (FHRAI) also appealed to the government for soft loans, highlighting that the restaurant industry had been the first to be closed in the pandemic crisis, and would possibly be the last to reopen (Chaturvedi, 2020a). The travel and tourism sector was estimated to have suffered losses exceeding USD 65.57 billion, with USD 25 billion in losses in the organised formal sector alone (Press Trust of India, 2020b). Scientific studies also showed that dining out raised the risk of contracting COVID-19 infection (Perappadan, 2020); therefore, consumer footfall in restaurants decreased with increased COVID-19 infections (Abrar, 2020).

The first six weeks of the lockdown until May 2020 did the worst financial damage to restaurants (*Economic Times Online*, 2020). Forecasts showed that more than 80% of restaurants might not function properly until the virus threat had receded. Furthermore, social distancing, public health protocols, reduced footfall and caps on diner counts (Government of India, 2020; Buch, 2020) impacted employment practices, working hours, HR policy, dining practices, menu and food preparation and the supply-chain. Many predicted that the pandemic signalled the end of an era of dining habits, with new technologies and forms of consumption replacing them (Goyal, S., 2020; Indo-Asian News Service, 2020a; Kuijpers et al., 2020; Lifestyle Desk, 2020; Nangia, 2020; Velkar, 2020; Vishal, 2020a; 2020b). The President of the NRAI, Anurag Katriar, declared that the food services sector had suffered the second highest loss among all Indian industries (Sathyavathi, 2020). The government was also criticised for not doing enough to protect the restaurant sector (Alawadhi & Phadnis, 2020; Indo-Asian News Service, 2020b). A lack of government bailouts and insurance support, compounded by stringent regulatory overview of reduced operating hours, alcohol sale prohibitions and a refusal to waive steep licence fees, affected restaurants economically (Chaturvedi & Haider, 2020; Soni, 2020).

Standalone restaurants in upmarket neighbourhoods such as Connaught Place and Khan Market in India's capital city Delhi were closing down, or moving out due to steep rentals and costs (Divya, 2020; Joshi, 2020; Nigam, 2020). The President of the NRAI spoke about the coronavirus's impact on dining in malls, ideal locations for eateries due to consistent foot traffic (Borah, 2020). Reports also suggested that restaurants located in upscale malls were now moving out due to lower footfall, limits on numbers of diners, and steep rentals (Bhushan, 2020a; Press Trust of India, 2020c). Even top-end restaurants were struggling with the crisis (Tandon & Borah, 2020). A noted food columnist and Michelin-rated chef, Suvir Saran, stated that restaurants had to survive by thinking "out of the box" (Nigam, 2020). A prominent restaurateur in the fine dining segment, AD Singh, said that dining out would plummet during and after the pandemic, diminishing events such as celebrations, parties and special occasions (Vishal, 2020b).

Restaurants were one of the worst impacted sector due to COVID-19 (Jacob, 2020; Lamba & Mohan, 2020). Food aggregator *Zomato* reported that 10% of the restaurants in India had already closed down by August 2020, with 30% more heading for closure. By August 2020, only 17% of dining-out restaurants were functional (Goyal, D., 2020). Campaigns such as "#SafeToEatOut" attempted to revive patronage by highlighting safety precautions and hygiene and sanitation, but the pandemic had already fundamentally changed consumers' dining habits, choices and preferences (Sanand, 2020; *Times of India*, 2020). Recurring waves of COVID-19 infections also made consumers nervous about patronising dine-in restaurants after an initial easing of restrictions in September 2020 (*Financial Express Online*, 2020). Depression caused by extended confinement had also changed people's behaviour. Industry experts remarked on diners craving comfort food more (Ghosh, 2020). An industry expert, Madhur Singhal, emphasised changes in consumers' preferences due to the pandemic (Indo-Asian News Service, 2020c). Industry researcher SEMrush reported that food consumption by Indians had fundamentally and drastically changed due to the pandemic (Mehrotra, 2020). Restaurants also realised that social media

and online presence were indispensable for continued survival (Sharma, 2020).

By December 2020, restaurant revenues were recovering, driven primarily by foodtech apps for home delivery (Bhushan, 2020b). Dine-in revenues recovered by February 2021 (Arora, 2021) towards the end of the first wave when the Indian government claimed that COVID-19 was in its "end game" (Press Trust of India, 2021a). However, the destructive second wave's impact in May 2021 resulted in India reporting the world's highest infection rates and with the reimposition of widespread lockdowns (Reuters, 2021; *Business Standard Web Team*, 2021).

From Figure 1, it can be seen that India's per capita urban consumer spending on food services was the lowest among those listed. Spending was even more seriously affected due to COVID-19. While the 5% CAGR was appreciable for 2014–2019, the pandemic and associated lockdowns caused a massive contraction of 54% in 2020. Coupled with predominantly low spending patterns in India due to its rural populace and preference for homemade meals, the pandemic's impact on food services was particularly adverse.

The fine dining segment: a decline predicted before COVID-19

The President of the NRAI, himself a keen restaurateur, stated in an interview that "fine dining was dead", especially among the Millennial segment who preferred casual and quick services rather than elaborate meals (Agarwal, 2017). Another renowned restaurateur, AD Singh, echoed this view, remarking on the trend towards casual forms of dining and Millennials' general preference for cheaper and quicker foods (Agarwal, 2016). Personnel shortages were major problems for this segment, as India's hotel management institutes were not providing sufficient training in language, etiquette and segment-specific skills (Kansara, 2019a). The segment faced a major shortage of fluent English-speaking staff. High attrition levels of 40%–50% were another major problem (Kansara, 2019a).

Nevertheless, it is anticipated that fine dining will make a comeback towards 2030 as Millennials age and mature, developing more sophisticated and refined tastes. This group is seen to be more concerned about nutrition, transparency and pricing (Singh, A. D., 2020a). Fine dining is expected to survive despite slower growth rates and smaller contribution in the food services sector. Table 1 shows consumer spending on fine dining as a share of total food service sector spending. For the periods of 2010 and 2020, it is only around 1% while projections for 2025 see it shrink to 0.97%. The CAGR for 2010–2020 and 2020–2025 also suggest slower growth than the overall food sector, indicating a shrinking market share.

Understanding the fine dining experience

Traditional fine dining is highly formal, pricey, upscale and ritualised, focused on culinary excellence and service specialty. It is a dedicated gourmet offering involving flamboyance and *élan*. Service levels and professionalism are high, with a selection of wines and spirits and an expansive menu. Dishes are typically described in detail and food prepared from scratch — often in full view of guests. Service is slow and deliberate, with a leisurely pace of dining; a typical fine dining experience often exceeds two hours (Barrows et al., 2011). Spending on fine dining is always discretionary. Consumer motivations to dine

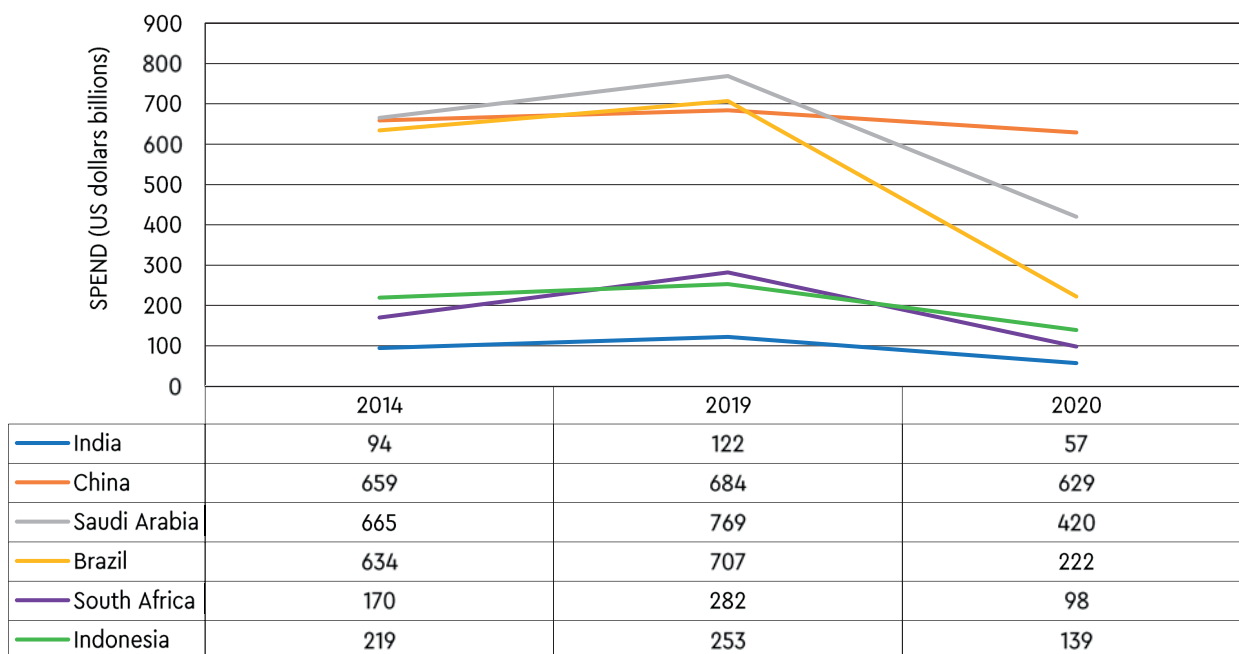


FIGURE 1. Per capita urban consumer spending in food services across six countries (Source: Technopak Advisors Private Limited, 2022)

TABLE 1. Indian monthly household spend on fine dining/other segments with growth rates (Source: Technopak Advisors Private Limited, 2022)

Format	Average monthly spend per household (USD)*				Compound annual growth rate (%)		
	2010	2016	2020	2025 (projected)	2010–2020	2016–2020	2020–2025 (projected)
Quick service restaurants	16.96	20.97	23.72	28.04	3.40	4.20	3.40
Casual dining restaurants	14.25	17.01	19.36	22.77	3.10	4.40	3.30
Café	7.92	8.51	8.75	9.05	1.00	0.90	0.70
Frozen dessert/ice cream	5.31	5.11	5.00	4.87	-0.60	-0.70	-0.50
Pubs, bars, clubs and lounges	3.96	4.53	5.00	5.65	2.40	3.30	2.50
Fine dining restaurants	0.49	0.57	0.63	0.69	2.40	3.30	2.00
Total (value/growth rate)	48.89	56.71	62.45	71.08	2.50	3.30	2.60

*Spend per household per month is calculated in constant 2021 dollars; A household comprises four members; USD 1 = INR 75

finely are specific and focused. Campbell-Smith (1970) describes that fine dining factors strongly on variety, status, culture and tradition. The consumer is knowledgeable, possibly curious and venturesome, or driven by projecting status, respect and prestige, or creating a favourable impression on others. Special occasions like birthdays, anniversaries, important dates, or festivals may also be a motivation. Fine dining is not driven by convenience, shirking the labour associated with preparing an elaborate meal or impulse. Hence, the segment is intended exclusively for the rich and upper social classes.

Fine dining serves *haute cuisine* with ethnic inclinations like French, northern Italian or Chinese, and décor is consistent with the theme and concept. The food itself is only a small part of the experience; several other factors are critical: décor, lighting, furnishings, cleanliness and hygiene, air-conditioning, acoustics, room size, clientele, price and, most importantly, service. A sommelier recommends wines, a *chef de rang* (or chief waiter) bones and carves meats, flambéing foods such as shrimp, or preparing sauces and a *commis de rang* (assistant waiter) carries the plates. In *gueridon* or *flambé* service, food is

wheeled to the table in semi-prepared form, and then cooked in front of the guests (Payne-Palacio & Theis, 2016). The waiter is an artist rather than a server. The process is entertaining and a sensory experience. The experience is hedonistic and epicurean, highly engaging and gives insights into the culture of the cuisine being served. Fine dining is at the apex of the dining spectrum (Figure 2). However, the diner's role is passive and co-creation opportunities are limited due to rigidity and formalisation (Table 2).

The dining-out and fine dining segments: emerging trends during the pandemic

The dining-out segment (once considered recession-proof) suffered more than the takeaway and delivery segments. Dining-out operated at only 8% to 10% of pre-pandemic levels, enduring sustainability and feasibility challenges (Goyal, D., 2020). New formats such as DIY kits, partially cooked meals, live kitchens, health foods, immunity-boosting foods and contactless dining experiences were also growing in popularity. Coupled

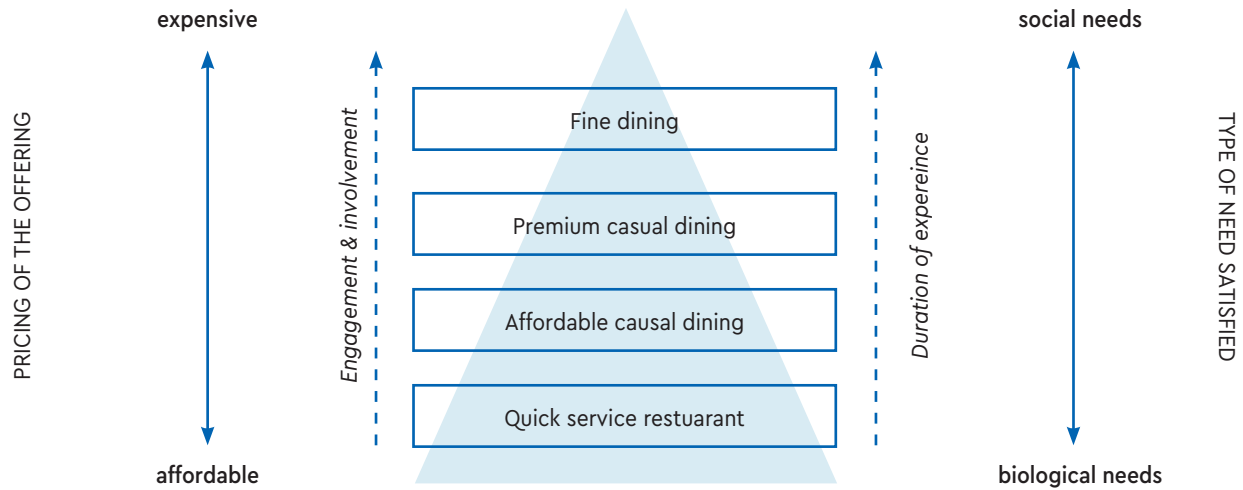


FIGURE 2. The dining spectrum

TABLE 2. Parameter-wise comparison between fine dining and casual dining

Attribute	Fine dining	Casual dining
Type of food	Unique and ethnic	Popular foods
Dining cost	High (>INR 3 000)	Medium (<INR 3 000)
Restaurant environment	Thematic and elegant	Comfortable
Dining ambience	Highly formal	Casual & informal
Dress code	Formal	Casual & informal
Pace of dining	Slow (>two hours)	Fast to medium
Cutlery and aesthetics	Separate cutlery for each dish and food type. Highest quality	Usually a fork, spoon and knife, with a soup spoon.
Food dressing and presentation	Highly aesthetic and decorated. Artistic presentation and appeal.	Pleasant, but not decorated to an art form.
Staff training levels	Very high. Formalised to a level of rigidity	High. However, service is relatively informal.
Number of servers	Two waiters	One waiter per table
Light intensity (lux)	161-215 lux	323-431 lux
Space available per seat (m ²)	2.23 m ²	1.5-1.9 m ²

with consumers' behavioural transformations, these novel markets affected the segment. Low demand was also attributed to losses of discretionary income due to the pandemic's economic effects (Shyam, 2020).

Major newspapers reported that fine dining restaurants were now offering home deliveries and takeaway meals for diners (Khosla & Saluja, 2020; Paitandy, 2020; Pathak & Majumdar, 2020) (Table 3). Branded five-star hotel chains such as the The Leela, Ritz-Carlton and JW Marriott were considering home delivery of their fine cuisine (Dewan, 2020). Food delivery aggregators like Swiggy and Zomato were partnering with these hotel chains (Khetarpal, 2020). The world famous Taj Hotels also announced a range of measures following the pandemic, ranging from closing its buffet meals, reducing restaurant seating capacities by half, removing menu items and launching the mobile app Qmin, designed for contactless delivery of fine dining to customers' homes (Gandhi, 2020a). *Vogue* magazine compiled a list of all five-star hotels in India that were offering delivery and takeaway services (Goyal, R., 2020). Table 2 makes it evident that not even a single major brand in India was spared the effects of the pandemic, opting for delivery to ensure a stream of revenue

from their restaurants. ITC Hotels put its Peshawari-themed restaurants online with Swiggy (Tandon, 2020). The Ritz-Carlton offered do-it-yourself recipes, delivering key ingredients supported by the chef's special step-by-step instructions for preparing signature gourmet meals at home (Gandhi, 2020b). Ultra-luxury brands like the St. Regis in Mumbai offered butler services in diners' homes (Siddiqi, 2020).

Food delivery by star hotels is expected to grow (Gandhi, 2020b). Many top restaurants in the country entered into the home delivery business. The chief operating officer of Indian Tobacco Company (ITC) said: "If the customer cannot come to the restaurant, the restaurant must go to the customer" (Vishal, 2020c). ITC's boutique fine-dining brands (Bukhara, Dumpukht and Ottimo, among others) were offering home delivery (Chaturvedi, 2020b). The CEO of tech start-up Dineout said that "...we are seeing more and more high-end hotels opting for takeaways and deliveries" (Khatri, 2020). By 2021, luxury hotel brands were curating special delivery menus focused on evolving consumer preferences (Mohile, 2021).

TABLE 3. Major five-star hotels in India offering home delivery

Hotel brand name	Delivery offering	Restaurants	Partner	Remarks
ITC Hotel	Gourmet couch, flavours, responsible dining, flying brunch	Peshawari, Bukhara, Dumpukht, Ottimo Themed restaurants across 8 major properties All signature dishes from restaurants	Swiggy, Zomato	All major metros and Tier-2 cities*
Welcomgroup Hotels	Qmin mobile app	All fine dining restaurants, except buffet meals	Internal logistics	No change in price
IHCL				
Taj & The Gateway Hotels				
Marriott Group	Marriott on Wheels (55 hotels across brands)	All major Marriott 5-star properties	Swiggy, Zomato, Internal logistics	63+ Marriott group hotels offering food across 20 cities; discounts offered
Luxury: Ritz-Carlton, JW Marriott, St. Regis	DIY meal kits (Ritz-Carlton)	Signature gourmet dishes. Ingredients delivered with chef's recipe	Internal logistics (Ritz-Carlton)	
Premium: Sheraton, Marriott, Westin, Le Meridien				
Select: Courtyard, Four Points, IHG Group: Holiday Inn	Yes (unbranded)	All cafés, resto-bars, à la carte menus from all restaurants (Chennai, Mayur Vihar, Amritsar)	Swiggy, Zomato, Internal logistics	Up to 50% discount for existing customers and attractive offers for new customers
Luxury: Intercontinental Hotels	Food on Wheels	Mahabalipuram in Chennai	Internal logistics	Serving large expatriot community of the city; reduced prices
Premium: Crowne Plaza	Food on Wheels	Signature restaurant in Noida, Kochi	Swiggy, Zomato, Internal Logistics	
EIH Hotel Group	Yes (unbranded) - launch of exclusive app	All Oberoi Hotels located in major cities.	Internal Logistics	Menu available online
Luxury: Oberoi Hotels	mooted			
Premium: Trident	Happiness delivered	Only in Mumbai and Chennai	Internal Logistics	Menu shared on Facebook
Hyatt Hotel	Yes (unbranded) - signature dishes, gourmet, à la carte	All gourmet services	Food Cloud, Swiggy, Zomato & Internal Logistics	Up to 25% cheaper than dining in
13 of 32 properties across India's Tier-1 and Tier-2 cities*	Cook like a pro (DIY)	All signature dishes		
Leela Hotels	"Gourmet delights from your palace" under the ambit of #LeelaSuraksha	Citrus and Zen in Mumbai; similar exclusive restaurants in other major cities; special menu exclusively for home delivery	Swiggy, Dunzo, Internal logistics	Starting from special price of INR 475; 10% discount for takeaway orders
All properties in major cities and metros				
Hilton Group	Curated home deliveries: offered across all Hilton properties; Double Tree offers a "lockdown menu"	Signature dishes only limited to 20 dishes during lockdown period.	Zomato, Swiggy	All Hilton hotels at major locations; customisation options available
Premium: Hilton & Double Tree	Happiness in a box	Caraway Kitchen, Indian Durbar and Signature Restaurants of Pune	Zomato, Swiggy	Conrad is only present in two locations in India
Luxury: Conrad Bengaluru & Pune	Yes (unbranded)	Signature dishes, gourmet and menu items	Swiggy, Zomato	Takeaway at all locations; delivery at select locations
Accor Hotels	Meals On Wheels@Sarovar #Happydiningathome	Regular, popular dishes (shortened menu); Most Indian dishes with localised flavours.	Internal logistics	Delivery services available at only 9 of the 81 properties distributed across India
Novotel, The Square by Novotel, Sofitel & KooX	Home delivery, Grand-and-go	Chef on Call, Bartender on Call	Swiggy, Zomato, Internal logistics	All city locations
Sarovar Hotels	Chef and bartender at home under the food reimaged brand pillar	Popular and comfort food; Indian dishes predominant; limited menu of 35 dishes of various cuisines	Swiggy, Zomato	Items priced from INR 250
The Lalit	(Unbranded) gourmet home delivery	Kheer fine dining restaurants (all locations)	Swiggy, Zomato	First hotel in the world to live stream kitchen feed to customers for delivery
The Park		Roasted by Roseate in-house barista (8 locations)	Internal logistics	
Roseate Hotels and Resorts	(Unbranded) delivery	Signature restaurants in Jaipur, Varanasi and Lucknow	Swiggy, Zomato, Internal logistics	Takeaways offered at all hotels
Clarks Group				
Locations in 5 cities				

*There are eight metropolitan Tier-1 cities in India: Delhi, Mumbai, Bangalore, Chennai, Hyderabad, Kolkata, Ahmedabad and Pune. Another 104 cities are categorised as Tier 2 cities, and the remaining cities fall under Tier-3.

The trajectory of fine dining in India

The unorganised informal segment dominates India’s food service market (Figure 3, Table 4). Fine dining exists both in standalone establishments and chains (Figure 4), but holds the smallest share of the market and is expected to grow the slowest. Otherwise, fine dining is present only in star-hotels. However, this share is very small as observable from Table 4. COVID-19 saw fine dining shrink by 78% (Table 5). Its expected market-share by 2025 will only be around 1% overall, with shrinkage both in standalone and chain formats (Tables 6 & 7).

The concentration of fine dining restaurants in major Indian cities is key to their decline. Reports show that 92% of India’s fine dining restaurants are located in high streets (Figure 5). In India, these are in congested cities with high rentals and limited parking space. Such restaurants cannot survive by subsisting predominantly on home deliveries. The other space where fine dining operates is in star hotels. This is a small segment in India and is projected to invite minimal investments from 2020 onwards (CBRE, 2019). Furthermore, star hotels showed alarmingly low rates of occupancy through the crisis ridden months in a report published by the Confederation of Indian

Industry (Confederation of Indian Industry-Hotelivate, 2020) (Table 8). Such hotels are also concentrated only in major cities, resulting in fine dining catering to a niche segment in urban locations (Figure 6).

The projections were based on the premise that COVID-19 is a singular, disruptive and exigent event, without considering multiple variants, repeated infection waves and long-term persistence (Chengappa, 2021). Yet, by May 2021, localised lockdowns were re-imposed across the country due to the second wave, virtually causing another shutdown (Pakrasi, 2021). The data suggested that in future, fine dining in India would be strongly linked with the 5-star hotel segment. Government data showed only a very small number (Figure 7).

COVID-19 in perpetuity: the purported impact of multiple persistent waves

Multiple new variants were discovered alongside a second wave of infections in India (Biswas, 2021; Sharma, 2022) in 2021. Figure 8 showed that by April 2021, the entire food service sector had closed down again. The second wave was as severe as the first in terms of its economic effect on food services. COVID-19’s

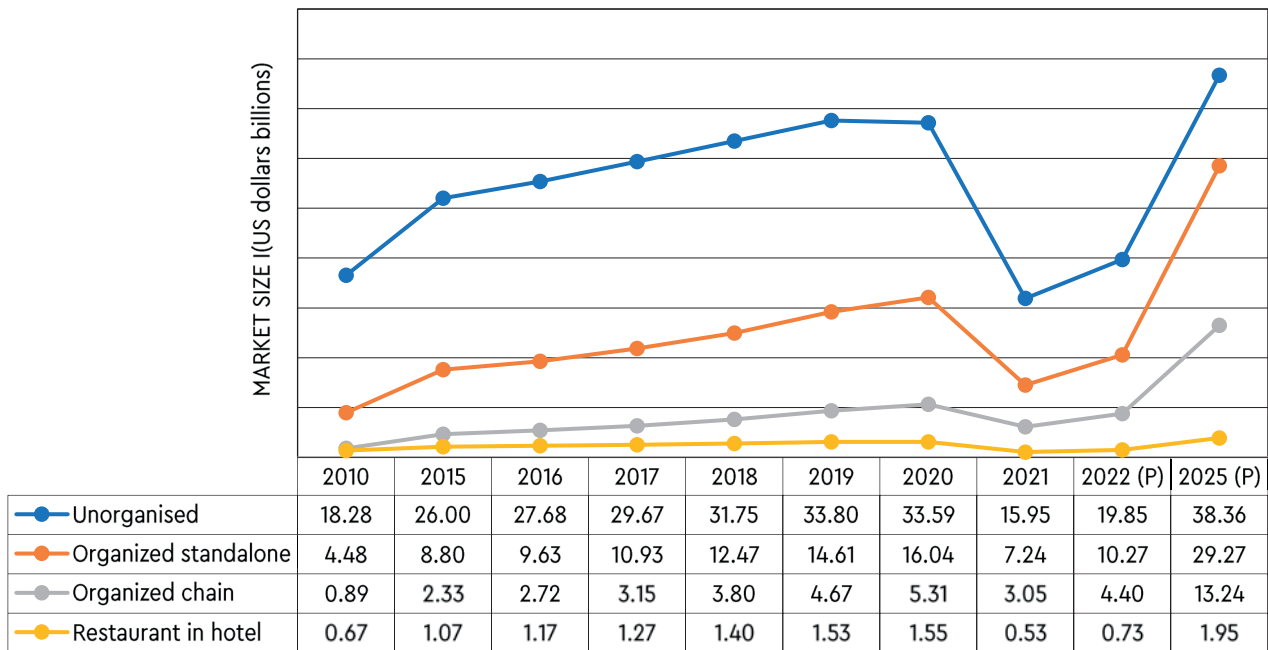


FIGURE 3. India’s food services industry market size in USD billions (Source: Data from Technopak Advisors Private Limited, 2022)

TABLE 4. Market share and growth rate of various segments in India (Source: Technopak Advisors Private Limited, 2022)

Format	Market share (%)					Compound annual growth rate (%)		
	2010	2015	2020	2021	2025 (projected)	2010–2015	2015–2020	2020–2025 (projected)
Unorganised sector	74.4	68.1	59.5	59.6	46.3	7	5	3
Organised standalone	19.3	23.0	28.4	27.0	35.3	13	13	13
Organised chain	3.6	6.1	9.4	11.4	16.0	18	18	20
Restaurant in hotels	2.7	2.8	2.7	2.0	2.4	8	8	5

reputation as the “forever virus”, owing to its ability to mutate and persist, creating more potent and deadlier variants (Potter & Guterl, 2022), suggested that its impact would be perpetual, or for a foreseeable future period. The third wave of COVID-19 was unleashed in India by March 2022 (Editorial Desk, 2022;

Sinha, 2022), with a fourth wave predicted to hit by June 2022 (Balaji, 2022). Experts expressed difficulty in predicting the onset of coming waves (Koshy, 2022). However, each wave would adversely impact the food service industry with long-term implications.

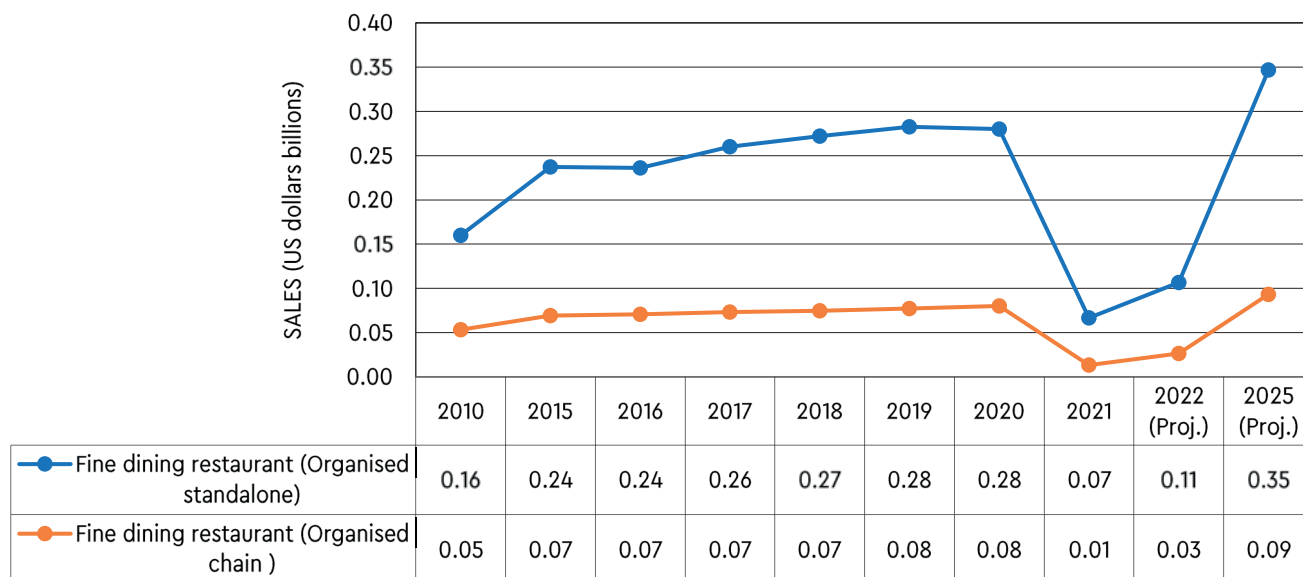


FIGURE 4. Sale estimates for organised standalone market in USD billions (Source: Data from Technopak Advisors Private Limited, 2022)

TABLE 5. Market share, capitalisation and growth rate of fine dining (overall) in the Indian organised food services market (Source: Data from Technopak Advisors Private Limited, 2022)

Compound annual growth rate (%)				
2010–2015	2015–2020	2020–2021	2020–2025 (projected)	2021–2025 (projected)
7.53	3.26	-77.78	4.1	53.14
Market share and sales*				
2010	2015	2020	2021	2025 (projected)
3.78% (USD 0.213 billion)	2.78% (USD 0.306 billion)	1.69% (USD 0.36 billion)	0.78% (USD 0.08 billion)	1.04% (USD 0.44 billion)

*Calculated in constant 2021 dollars; USD 1 = INR 75

TABLE 6: Market share, capitalisation and growth rate of fine dining (organised standalone) in Indian market (Source: Data from Technopak Advisors Private Limited, 2022)

Compound annual growth rate (%)				
2010–2015	2015–2020	2020–2021	2020–2025 (projected)	2021–2025 (projected)
8.21	3.36	-76.19	4.36	51.01
Market share and sales*				
2010	2015	2020	2021	2025 (projected)
3.37% (USD 0.1600 billion)	2.70% (USD 0.2373 billion)	1.75% (USD 0.28 billion)	0.92% (USD 0.0667 billion)	1.19% (USD 0.3467 billion)

*Calculated in constant 2021 dollars; USD 1 = INR 75

TABLE 7: Market share, capitalisation and growth rate of fine dining (organised chain) in Indian market (Source: Data from Technopak Advisors Private Limited, 2022)

Compound annual growth rate (%)				
2010–2015	2015–2020	2020–2021	2020–2025 (projected)	2021–2025 (projected)
5.39	2.90	-83.33	3.13	62.66
Market share and sales*				
2010	2015	2020	2021	2025 (P)
5.97% (USD 0.0533 billion)	2.97% (USD 0.0693 billion)	1.51% (USD 0.08 billion)	0.44% (USD 0.0133 billion)	0.7% (USD 0.0933 billion)

*Calculated in constant 2021 dollars; USD 1 = INR 75

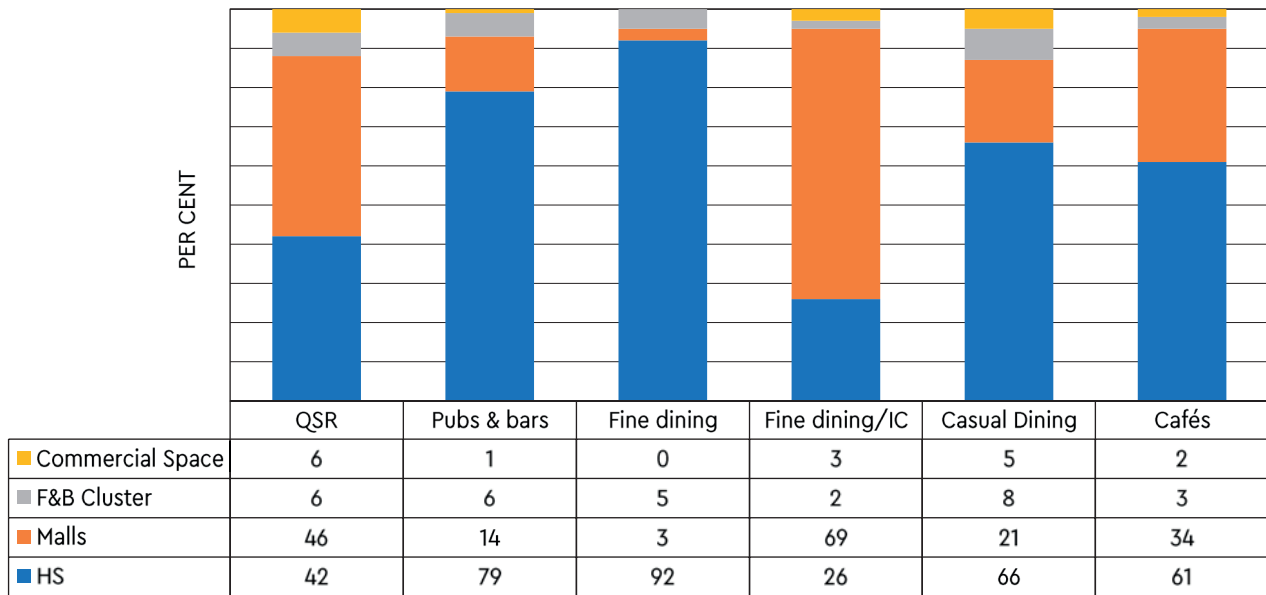


FIGURE 5. Location preference of various food service formats in sampling frame (Source: CBRE, 2018)

TABLE 8. Hotel occupancy trend comparison in 2020 showing impact of COVID-19 (Source: Data from Confederation of Indian Industry-Hotelivate, 2020)

Month	Typical (%)	During COVID-19 pandemic
January	80	80
February	75	70
March	75	45
April	75	7
May	70	10
June	60	12
July	55	15
August	55	22
September	60	25
October	70	28
November	70	30
December	75	35
Average	68	32

Comparing the old and new formats of fine dining

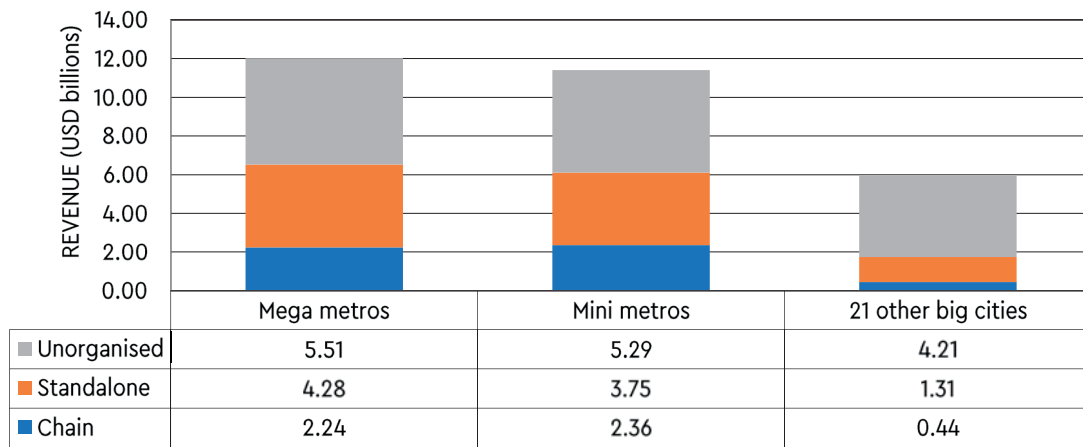
In fine dining, several actors come together in a staged experience which cannot be replicated in home delivery. Competitive differentiation is difficult in the case of home delivery, which is at best a service (Figure 9). In-house fine dining is dissimilar to a staged experience where the service is revealed over a duration of time (Table 9). The excitement or suspense associated with the progression of an experience would be notably absent at home. The ringing of a doorbell, or unpacking of food cannot recreate the visual treat of watching an exquisite dish being served on fine China, or the fresh sizzle of a steak as it is brought from the kitchen. The fine dining service is the stage, the food and other auxiliaries are the props and the dining atmosphere would be highly immersive to give customers a memorable engagement.

Experiences have two distinct characteristics in terms of customer participation and connection. Customer participation ranges from passive to active. Passive participation does not affect the performance as in the case in fine dining. In home delivery, it is active as the unpacking and setting of tables is done by the customer themselves (Table 10). For customer connection, the relationship is mediated by the setting environment. In a dine-in setting, there can be suspense and excitement elements which are absent in the home environment.

Experiences in fine dining could be entertaining or aesthetic. This effect cannot be replicated in home delivery. Home delivery would also make it difficult to recreate "instagrammable" food experiences. There is a gravitation towards experience-driven dining among Millennials who are motivated by social media posts and likes rather than the taste of the food itself (Chevalwala, 2017).

Fine dining in the "new normal"

The core value proposition of fine dining has been radically altered in the delivery format (Osario et al., 2022), causing a difficult transition (Norris et al., 2021). The business model has shifted its focus from the dining area to the kitchen, changing value creation, capture and delivery, with the new "solution orientation" diluting intimacy of dining, menu complexity and sophistication, theme, ambience and service uniqueness. The menu is downgraded and presentation is less extravagant (Zapata-Cuervo et al., 2021). This is a compromised existence in the crowded delivery pace. Fine dining has inadvertently shifted from its former sensory-rich hedonism to spartan utilitarianism in home delivery, resulting in a "reinvention" (Zapata-Cuervo et al., 2021). In its present state, it is unsustainable and unstable. It is also unsuitable for satisfying the needs of the diners (Figure 10). The social rewards of the dining experience would not be obtainable in the home delivery format. To justify the service experience and the price, fine dining in the home delivery format must evolve and provide added services to sustain its



Data excludes restaurants in hotels category. Revenue calculated in constant 2021 US dollars (USD 1 = INR 75)

Mini metros: Ahmedabad, Bangalore, Chennai, Hyderabad, Kolkata and Pune

Mega metros: Delhi and Mumbai.

21 other big cities: Jaipur, Lucknow, Surat, Nagpur, Kanpur, Indore, Patna, Chandigarh, Kochi, Coimbatore, Vadodra, Ludhiana, Nashik, Varanasi, Madurai, Visakhapatnam, Bhopal, Amritsar, Rajkot, Trivandrum, Goa

FIGURE 6. Concentration of food services by value in major Indian cities (Source: Data from Technopak Advisors Private Limited, 2022)

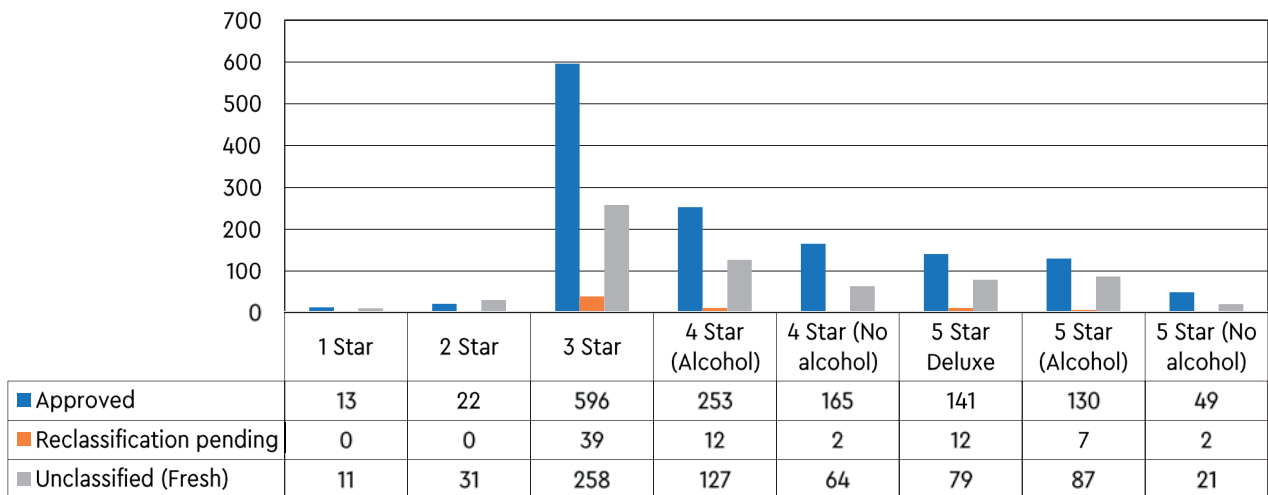


FIGURE 7. Star hotel count classification in India (July 2022) (Source: Ministry of Tourism, 2022)

value proposition and engage the diner. Many of these augments would be in the digital realm, facilitated by apps. Some of the proposed evolutions and increments in this format for the future period are depicted in Figure 11. The advent of 5G internet technologies would further amplify the deliverables in the online/digital sphere.

Concluding thoughts: fine dining in the post-COVID era

Globally, fine dining was the worst affected (Nhamo et al., 2020), and the last that is expected to recover in the food services sector (Osario et al., 2022). Many restaurants resorted to "side-branding" in the delivery format to build their main brands. Technology became a key facilitator here (Lau, 2020). In India, fine dining restaurants depended on cloud/ghost kitchens

to address cost or margin issues (Bhushan, 2021), building on the newfound trend of delivery, changing from only a year earlier (Shrivastava, 2020). The effects were widespread (Pinto, 2021). The hotel industry, which reported losses of US\$17.3 billion by March 2021 (Press Trust of India, 2021b), with luxury hotels being the worst affected (Krishnan, 2021), were strengthening their delivery offerings (Asian News International, 2021; Press Trust of India, 2021c; 2021d), suggesting that this would become a mainstay into the future (Matta & Thaker, 2021; Shinde & Mohile, 2021). This was indeed the case by March 2022, as these diversifications had become a crucial lifeline for major international brands in India (Chaturvedi, 2022).

Studies show that that the post-COVID consumer prefers to avoid dining out (Gutgutia, 2020). Discretionary spending is affected due to larger economic problems. Top-end dining is

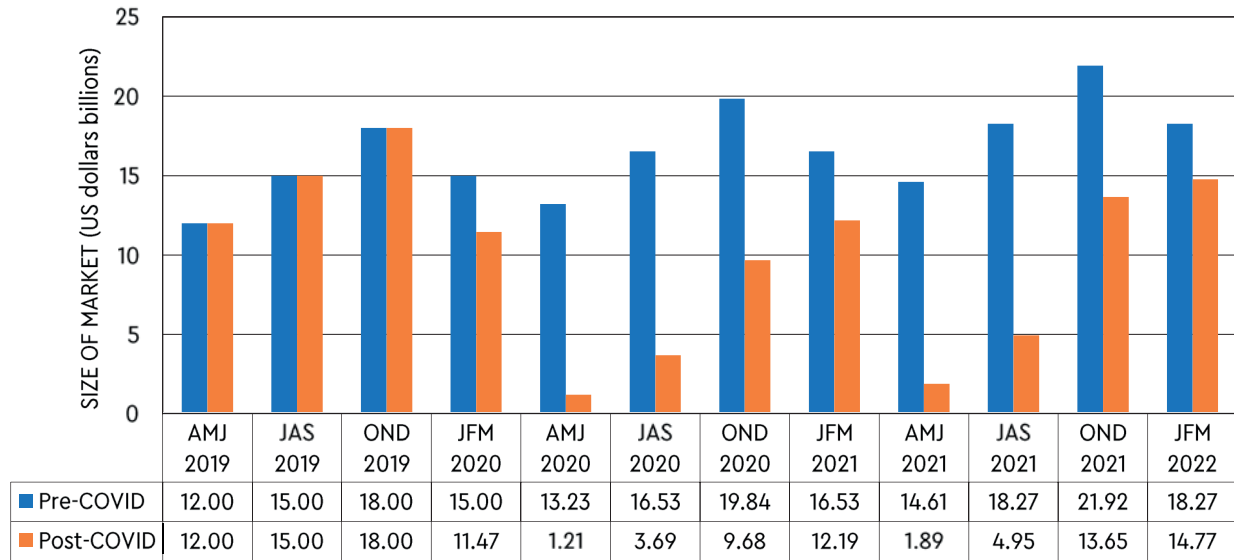


FIGURE 8. Food service sector income in India across two COVID-19 waves (Source: Technopak Advisors Private Limited, 2022)

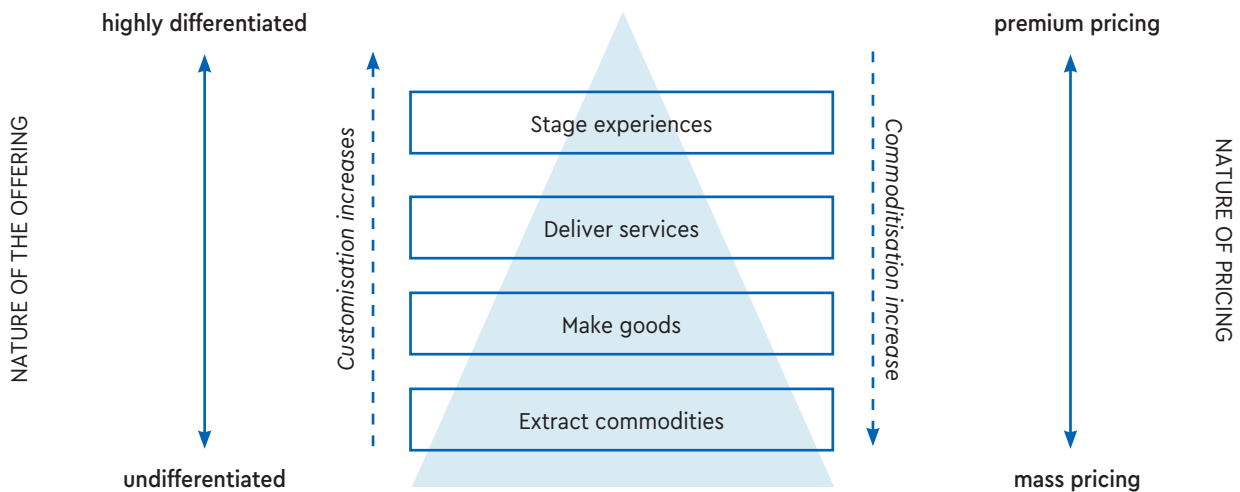


FIGURE 9. Progression of value in food services

TABLE 9. Economic distinction between service and experience

Economic offering	Quick service and casual dining	Fine dining
Customer classification	Consumer	Audience
Role of seller	Dispensation	Orchestration
Execution characteristic	Delivery	Creation
Offering characteristic	Intangible/perishable/mentally impalpable	Sensory/gustative/olfactory/tactile/visual/aural
Consumption characteristic	Simultaneous consumption with delivery	Unfolding of events over a time period.
Interpretive characteristic	Customisation	Individualisation/personalisation
Customer role	Passive recipient	Active participant
Marketed characteristic/purchase trigger	Benefits and features	Sensations, memories, experiences

almost entirely discretionary (Chaturvedi & Bhushan, 2019a). the fine dining segment globally has been vulnerable to recessions and economic downturns (McLaughlin, 2009). Fear among diners is another genuine problem (Dey, 2020). Standalone fine dining restaurants are expected to be the worst hit, due to costs coupled with restrictions. For star hotels, where food and beverages constitute the second biggest source of revenue (Kansara,

2019b), coping has manifested through delivery methods. In its new format, the experiential aspect of fine dining is radically downgraded. Most star hotels and fine dining establishments have already cut their menus to a few signature dishes or comfort foods (Das & Tembhekar, 2020; Gafoor, 2020; Khetarpal, 2020).

The online space will inspire new forms of competition in marketing and pricing. Here, fine dining is competing in a space

TABLE 10. The four realms of experience

Quadrant	Effect	Description
Active participation-absorption	Educational	Example: unpacking a fine dining home delivery meal. Customers are involved, but not immersed.
Active participation-immersion	Escapist	Acting in a show, or live cooking alongside a celebrity chef. Customer is actively participating, and is highly involved.
Passive participation-absorption	Entertainment	Watching television or a concert, eating fast food. The customer is a passive participant who is not highly involved.
Passive participation-immersion	Aesthetic	A visitor in an art gallery, or a diner in a fine dining establishment. Customer is a voyeur, but deeply involved.

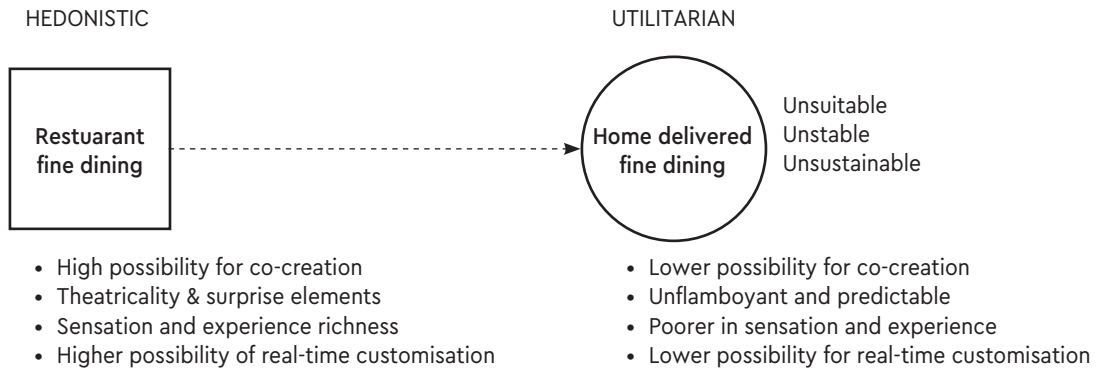


FIGURE 10. The effects of the transition from traditional fine dining to home delivery

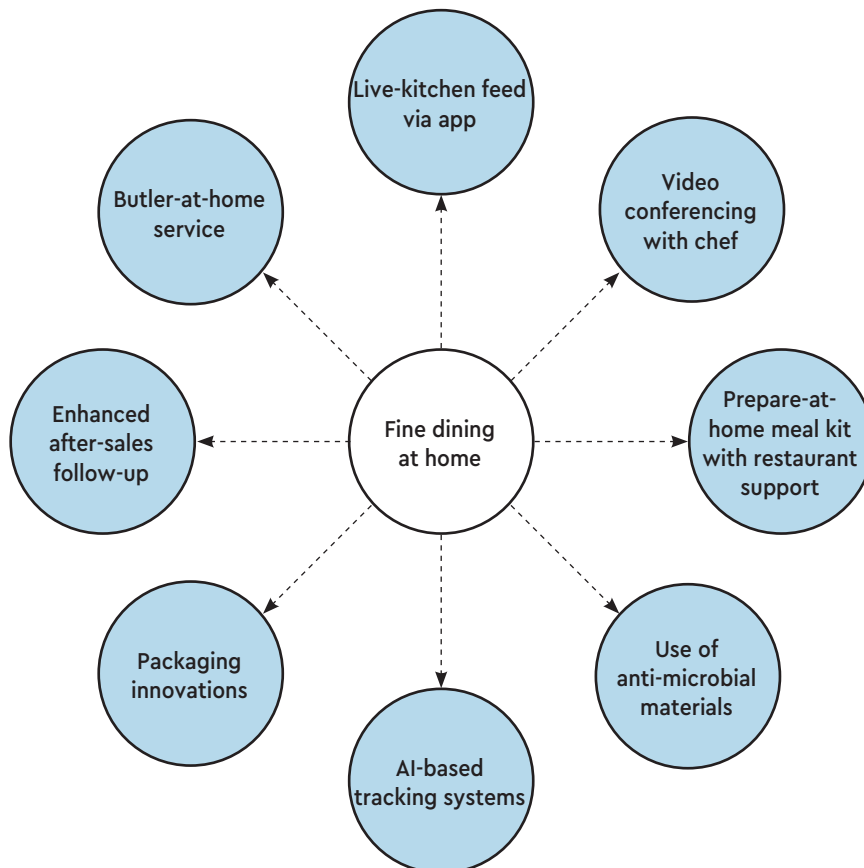


FIGURE 11. Future possibilities for the evolution of fine dining in the delivery format

not designed or intended for its concept. Aggregators who dominate this space drive sales via discounts (Mohile, 2020). Also, aggregators charge significant commissions, creating deep discounting to push sales (Mishra, 2020). The value of fine dining would erode as the price would become a crucial determinant. There is already a sense of resentment among restaurants towards food aggregators like Swiggy and Zomato, calling them "digital landlords" for their dominance and punishing terms (Kaushik, 2020). The pandemic has only made these aggregators stronger, allowing them to dominate the relationship and exert more stringent terms, while reporting record revenues (Dash, 2020; Economic Times Bureau, 2020). Reports prior to the pandemic by a government agency suggested that food aggregators were cannibalising the dine-out segment (Indo-Asian News Service, 2019).

Fine dining's "solution orientation" with delivery has long-term repercussions, as off-premises dining brings different challenges. Service touchpoints are different, as is the core value proposition. The targeting strategy to reach a new breed of customers would need to be studied in the online space. How the old breed of "fine diners" accept the current format is another area of study. Improving experiential aspects for the diners demands an exploration of consumer needs. Improvement of performance and control over operations is another key challenge. The digital mode of service delivery requires a study of the altered customer relationships and channels of promotion and distribution. A study on costing is another critical factor as online space is price competitive. The service delivery partner also shifts from the experienced servers/waiters/sommeliers to the third-party gig worker.

Dine-at-home can never complement or substitute an actual fine dining experience (Singh, S., 2020). Food cannot be as fresh as that carried directly from the kitchen, and there is the complete elimination of artistic expression. Aesthetic cues in the presentation of food as well as the surroundings are needed for a rich sensory encounter. The star hotels' intention to drive sales and generate revenues through deliveries may cannibalise or kill off the market for fine dining in the long term. This is critical as the delivery segment is growing for such hotels (Mohile, 2020). While fine dining was already slowing before the pandemic (Chaturvedi & Bhushan, 2019b), it may face a complete demise or decline in the post-COVID era. Fine dining as a segment might still survive, but most fine dining restaurants will not.

ORCID iDs

Kishore Thomas John – <https://orcid.org/0000-0001-8614-0896>

Rejikumar Gopalakrishnan – <https://orcid.org/0000-0001-9549-352X>

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