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THE DEVELOPMENT OF AN AUTHENTIC INDIAN RESTAURANT CONCEPT IN PORTUGAL: IDEA VALIDATION

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Abstract

Recent trends demonstrate a crescent demand for ethnic restaurants in Portugal, that Indian cuisine is not as well-entrenched as other international gastronomies and that current offers are mostly characterised by commercialised food and lack of differentiation. Hence, to capitalise on the market gap, the authors developed a unique detailed concept that aims to deliver a novel experience of Indian culture and cuisine, rooted in authentic and sustainable values, to adventurous food seekers. For *the development of an authentic Indian restaurant concept in Portugal*, focus is given to the most critical aspects for a successful business implementation.

Key Words: Premium-Casual Dining, Authenticity, Indian Cuisine, Sustainability, Adventurous Food Seekers.

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Disclaimer

The present project was fully developed through a collaboration between the two authors, Maria Braz and Priya Balkrisna. However, the work has been split into two complementary parts with an initial common segment. The first, by Maria Braz, includes the common introductory part and the concept development of the project. And the second, by Priya Balkrisna, includes the same introductory part and the concept implementation of the project. To fully comprehend the project, both parts should be read together.

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1. Project Overview

The present project aims to introduce and contextualise a unique, authentic concept of Indian cuisine in Portugal, more specifically in Lisbon – *Ode às Naus*. The business opportunity arose from inferring a potential gap in the Portuguese market. Recent trends demonstrate that there is a global *crescent demand for ethnic restaurants*, particularly Indian, and in Portugal, this becomes distinctly evident in Lisbon (IMR, 2019; Pearson, 2020). In Europe, Asian food is entering a phase of maturity and concept development, and the likelihood of more *premium offers emerging is increasing* (Euromonitor International, 2020a; Joshi, 2018). However, in Portugal, it is not as well-entrenched as other international gastronomies and is still associated with *clear misconceptions*, such as lack of hygiene and overly spicy food (Ferdman, 2015). Moreover, current offers are mostly characterised by commercialised food and *lack of differentiation*, failing to meet Portuguese customers' needs and expectations. All the aforementioned factors result in a potential gap in the market for a new approach to Indian food.

Ode às Naus is a full-service restaurant start-up project. The intent is to build a restaurant brand by placing Indian culture and authenticity centre-stage – to welcome the customer into *a unique experience of Indian culture and cuisine*. An all-encompassing concept that taps into honest and *sustainable* practices not wedded by usual conventions, providing a *customer service* reflected on true Indian hospitality, as well as on modern settings that remain connected to *authentic* Indian roots. The idea was developed through a collaboration between the two authors and is based on an inductive research approach that allowed to define the concept that would best suit the market.

The project is organised according to the following structure. Firstly, a comprehensive study of the Portuguese restaurant industry, including current and future trends, is provided in order to understand the strategic relevance of this market and the scope of opportunity to successfully implement this project. Followingly, an extensive analysis of the current competitive landscape regarding other Indian restaurants, in Porto and Lisbon, was conducted to identify the market potential and where competitive advantages can be gained.

Subsequently, to support and validate the potential of this opportunity, define the target market, verify previously made assumptions, and grasp customer behaviours and preferences, a survey with 392 respondents as well as four expert interviews were conducted. The results of this research are discriminated at different stages of the document, with a particular incidence at this stage. Further on, based on the inferences made from the primary and secondary data collected, a description is provided of what the business intends to offer, as well as key concepts related to the most crucial aspects of the project and the critical factors for its success. To conclude, the financial estimates necessary to implement it are detailed, since the authors intend to carry it through to reality.

2. Covid-19 Contextualisation

It is of overwhelming consensus that the restaurant industry, due to its social nature and the necessary restrictions imposed, was one of the worst impacted by the COVID-19 pandemic worldwide (Haas, et al., 2020). It led to disruption in consumer habits and a substantial pullback in consumer demand which, in turn, created a sudden and sharp shortfall in revenue and even prompted some restaurants to consider filing for insolvency (40% of bars and restaurants in Portugal) (Caetano, 2020; Euromonitor International, 2020a).

Nevertheless, several studies have shown that the customers have a continuing and strong desire to dine out, demand new cuisines and new methods of ordering, and that the foodservice industry will recover significantly once restrictions are lifted and touristic activities are re-established (Haas & Mohran, 2020; Lee & Jungkeum, 2020). The pandemic has also forced the industry to transform leading to significant future opportunities: a forced market contraction of the oversaturated restaurant industry created less future competition; a need for innovation in the business model and channel strategy; and increased ease in the procurement of qualified personnel (Khan, et al., 2020; QSR, 2020). Additionally, the restaurants that are more genuine, showcase robust concepts and create stronger connections to the consumers are the most likely to strive post-pandemic (Agência Lusa, 2020; FSR, 2020).

It is relevant to stress that the data and inferences made throughout the document do not include analysis relating to COVID-19, and its potential influence is not factored into forecasted data. The effects of the pandemic are too recent to indicate any clear future trends, and there is insufficient data to currently base any future decisions on. There will be clear long-term socio-economic impacts arising from the pandemic; however, as of yet, one is unable to assess the full magnitude of the effects in the industry. It is also in the authors' understanding that the concept developed holds *relevance and applicability* across the existence of the pandemic and can therefore be enacted once conditions are more favourable.

3. Industry Overview

According to PwC, the global foodservice industry represents €1.1 trillion in opportunity and is expected to grow consistently through the next decade (2019). The largest markets, namely USA, Europe, and Asia have all shown steady positive growth in past years and have revealed to be less phased by shifts in the economic climate (Riehle, et al., 2019). Hence, there has been a significant *increase in restaurant spending*, mainly due to *shifts in consumer behaviour* and perceptions (Rogers, 2019). This analysis will focus on full-service restaurants, that can be divided into four restaurant typologies: casual, fast-casual, fast-food and premium casual (Canziani, et al., 2016).

The Portuguese Restaurant Market

In 2019, the foodservice industry was the 11th largest sector in Portugal, generating €11 billion in revenues, with an average yearly growth of 3% since 2014 (refer to *Appendix 1*) (MarketLine, 2020). As of 2019, the accommodation and restaurant industry was responsible for creating 300,000 jobs in Portugal, equivalent to 7% of the total workforce (Euromonitor International, 2020b; INE, 2020a). Within the foodservice industry, *full-service restaurants* has continued to be the dominant segment, reaching €4 billion in revenues in 2019, 41% of the industry's total (refer to *Appendix 2*

& 3) (MarketLine, 2020). Currently, independent family-owned restaurants represent the great majority of the full-service offer in the country, a trend unlikely to change over the forecasted period (JN, 2020). Despite such promising data, the sector still suffers from three main shortfalls: a *shortage of qualified labour*, *straining job demands* and a *lack of fair professional validation* (Chaves, 2019).

The restaurant industry in Portugal is currently defined by two main factors: the *influence of tourism* on the sector and the *shifts in customer behaviour*.

Portugal's geographic setting allows tourism and hospitality to be one of its most developed sectors, currently accounting for 8.7% of the country's GDP, and is expected to continue to grow considerably above European averages (INE, 2020b; WTTC, 2019). The size and growth in this sector not only boost the foodservice sector's performance but also challenges players to innovate and adapt their offers, turning Portugal into one of the most specialised countries in restaurant activities in Europe (Euromonitor International, 2020b).

The country has also recorded the highest number of foreigners living in country, 580,000, a figure that has been steadily growing through the years due to the safety, quality of life and low cost of living it offers compared to the rest of Europe (Paulo, 2020; RIFA, 2020). Most foreigners that choose to move either temporarily (6 months to 2 years) or more permanently tend to focus on regions along the coastline, particularly Porto, Lisbon and Algarve, further potentiating the restaurant industry and the *presence of different cuisines* (Capela, 2019).

As of 2016, Portugal ranked fifth in Europe as the country with the most restaurant-goers. Portuguese households' expenditure on restaurants has increased by 22% since 2014, as customers are increasingly searching for food options outside their homes (Vicente, 2016). A study by IMR revealed that out of 2,000 participants, 23% claimed to have at least a meal per day out and that 78% conceded to regularly dining out. They identified several leading causes for such behaviour: lifestyle restraints, to avoid wasting time, lack of cooking skills and the wish to try new things (IMR, 2019). This trend has made customers more selective, demanding increased quality, added value experiences and innovative concepts and flavours (Euromonitor International, 2020a). As a result, to remain competitive, restaurants are challenged to provide *differentiated offers* and adapt to a new and *highly informed consumer* (Riehle, et al., 2019).

4. Industry Trends

Changing consumer eating habits and lifestyles

Widespread busier lifestyles led customers to prioritise *convenience*, spend *less time* preparing meals at home and choose to spend their free time *socialising over a good restaurant experience* (Rogers, 2019). The increased choice of dining out or ordering food has also generated a need for *differentiation* and *innovation* (IMR, 2020).

Customer preferences are not only shifting towards *healthier* and *higher quality cuisines* but also towards *diversity*. Regarding the latter, *changing demographics* and an ever more globalised world increased customers' demand for different cuisines and culinary experiences (Riehle, et al., 2019). There is a clear change in people's attitude towards ethnic restaurants and a greater clamour for more authentic ethnic food – an emergent trend that is expected to grow in the years ahead (Euromonitor International, 2020b). Moreover, customers are increasingly aware of the quality of the food and service, making hospitality both a growing concern for owners and, when done right, a great source of brand loyalty (Reichheld, et al., 2017).

The rise of millennial values

Millennial consumers, aged 22 to 37 years-old, have a new set of values, they seek "committed brands with authentic products (…) more local and natural" (Faber, 2018). These consumers are generally *tech-savvy*, *values-driven*, *collaborative*, *hyper-connected* and *social* (Feinberg, et al., 2017). They are increasingly *health-conscious* and *environmentally aware,* demanding curbs on plastic and waste, with 61% stating they believe that they can make a difference in the world through their choices (Daneshkhu, 2018). There is also a palpable concern for more *transparency* from the companies, a greater interest regarding food sourcing and a mindful decision to reduce consumption of processed foods. Moreover, these growing concerns are also partially responsible for the rise of plant-based diets as a trend, with vegetarian and vegan options becoming paramount to any restaurant menu (Olayanju, 2019).

This new generation of disruptors seek *conscious dining experiences*: *authenticity* and *sustainability* (Daneshkhu, 2018). In an oversaturated restaurant market, they value greater specialisation of the product and service to their needs, leading restaurants to offer an increased personalised offer. Hence, smaller brands are becoming industry challengers by offering more singular and exciting alternatives (Khan, et al., 2020). These millennial trends and habits are not merely characteristic of this generation but rather percolate throughout the whole industry. In fact, with Gen Z gaining more market power, constructs of authenticity are going to be critical for future endeavours and "[restaurant values] have to be a genuine outgrowth of who you are as a company" (Francis & Hoefel, 2018).

The power of technology as a tool

The role of technology in the foodservice industry has been one of the most disruptive trends in the past decade, and one that is forecasted to keep growing. *Digitalisation* has revolutionised customer experience and food delivery services (Martin, 2019).

The use of *home delivery services* is a trend demonstrating exponential growth and is becoming a highly competitive business, globally and in Portugal (Khan, et al., 2020). Mobile apps are revolutionising the market, allowing restaurants to increase their revenues, become closer to customers and possibly attract new ones (Euromonitor International, 2020a).

Technology has also become an essential part of the customer experience and a key communication tool, as it allows restaurants to better understand their consumers and to communicate their offer more efficiently (Feinberg, et al., 2017). Customer engagement during an experience is described in six stages: the decision to choose the restaurant, the waiting period to be seated, the moment they place an order, the moment they are served, when they pay and exit, and the aftermath (Yoo, et al., 2020). Each stage is now influenced by technology, creating benefits not only for the company, by increasing profits, but also for the customer, by enhancing their convenience and control over the process (Bolden, et al., 2017). The customers now use review-based and booking apps, such as TripAdvisor and TheFork, and at times the restaurants' social media, to make a more informed decision regarding the choice of restaurant. This carves an opportunity for the restaurant to strategically curate and share more of their offers and overall atmosphere (Sage, 2016). The use of *queue management* systems, with apps like QLess or small devices, has also become a trend (Klein, 2020).

Moreover, when the customers receive their food, they are more likely to take a picture and share it on *social media or review app*, increasing the restaurant's visibility (Reichheld, et al., 2017). *Cashless payments* are an upward trend, with mobile wallets or apps, like Apple Pay and MB Way, and the use of devices that allow the customer to split the bill while securely paying are increasingly demanded as *pay-at-the-table options* (Riehle, et al., 2019; Silva, 2020). Lastly, digitalisation allows businesses to understand the level of satisfaction of the consumer through shared media and reviews, or via feedback requests, allowing the restaurant to best adapt their offer and to neutralise weaknesses in its current processes (Littman & Beckett, 2020).

5. Market Analysis

5.1. Assessment of Competition

To better understand the viability and practicality of the concept, one decided to assess existing competition in the Portuguese market, particularly in Porto and Lisbon. Focus was given to the two cities due to their size and *multiculturalism* compared to the rest of the country. Indian restaurant offers in Portugal are a highly fragmented segment, in an already oversaturated restaurant industry. Moreover, there are a total of 81 full-service Indian restaurants in both regions, 71 in Lisbon and the remaining 11 in Porto, as of 2019. From the 81, each was individually analysed using eight metrics: type of service, type of cuisine, pricing strategy, location, online customer reviews, atmosphere, existence of website and Instagram account and presence on the two platforms (refer to *Appendix 4)*. Zomato and TheFork were the main databases used to collect the referred data, given their user affluence, recognition and popularity amongst consumers.

Regarding the *type of service* offered, 64 out of the 81 restaurants are placed in the casual dining segment. Indian restaurant offers in the fast-casual, premium casual or quick-service segments are still very scarce.

Although there is a wide variety of *Indian cuisines*, the analysis revealed that 65 out of 81 restaurants belong to one of the four major *types* being offered in Portugal: Indian Commercial (entirely vegetarian and mix), Indian Nepalese, Goanese and Indian Italian fusion. Most, 38 out of 65, have chosen to focus on a more *commercialised, adapted cuisine*. Broadly, such consists of adapted versions of the most popular Indian dishes, from the state of Punjab (northern Indian region) as it is more suited for western taste. Therefore, all businesses offer a variation of the popular dishes: Chicken Tikka Masala, Butter Chicken, Paneer Tikka Masala, Naan bread, Mango lassi and Kulfi.

Both the Nepalese (12) and Goanese (8) cuisines are the second most common offers. They tend to be particularly appreciated by the Portuguese due to recurrent use of coconut milk in most curry dishes, which helps to soften the spiciness. Likewise, the analysis also revealed a significant number of restaurants offering simultaneously Indian and Italian cuisines (7). The main reason behind the combination of both cuisines is the attempt to offer a larger variety of options to suit different consumers' tastes. However, the absence of focus in one cuisine might hinder consumers' *perception of Indian food*, as there is no relationship between both cuisines.

Concerning the *prices practised*, the average price per meal per person in most of the casual dining restaurants is set between 12 and 15€, with more upscale Indian restaurants being the outliers. Comparatively, the average price paid per meal per person in Portugal is 20€, indicating that Indian restaurants are currently practising far more competitive prices (Krauss, 2019).

Lisbon has a *higher concentration* of Indian restaurants compared to Porto. This can be justified by a larger presence of the Indian community in Lisbon compared to Porto (Pacheco, 2020). Moreover, there is a higher concentration in affluent and touristic areas of Lisbon, such as Baixa-Chiado, Avenida da Liberdade and Cascais. However, the vast majority are barely visible as they are located in secondary or narrower streets. In Porto, one could not identify a pattern due to the limited number of restaurants.

When examining the photos and comments left by customers on the platforms with respect to the *space and atmosphere* of the restaurants, most revealed not only *lack of cohesion* but overall lack of adequate interior decoration and attractiveness: unclean look, lack of cosiness due to the overuse of bright colours (red, orange, green and yellow), very outdated and old furniture, and several oddly placed Indian statues and frames (refer to *Appendix 5)*.

The *online communication strategy* employed by most restaurants is very rudimentary and lacks dedication. The majority of restaurants resort to some sort of online presence, even if only in Zomato or TheFork, however, they fail to promote their offers in an appealing and professional manner: the menu is usually a picture uploaded by a customer instead of a clean PDF, there is lack of menu description; unappealing photos of the dishes; non-existence of a restaurant concept or lack of mention to it (refer to *Appendix 5)*. Furthermore, regarding the *brand's online visibility*, only 49 have an Instagram account and only 39 have an official website. Those who have, tend to display an unpleasant and uninviting feed design, lack of customer engagement (limited number of likes, comments and followers) and very low social media activity (low frequency of *posts* and *stories*). These observations conclude that there is a lack of investment in promoting the business, leaving it mainly to external communication agents, namely blogs and digital media press.

Based on the analysis of the current market, one can conclude that there is *homogeneity in product offers and atmosphere*, and that restaurants are failing to adapt to the trends set by a more informed, modern consumer. Furthermore, very few potential competitors prioritised authenticity and personalised service. Finally, the communication strategies employed lack actuality and customer understanding, hence, failing to appropriately reach potential customers.

Direct and Indirect competitors

Where most restaurants are failing, as mentioned above, others are proliferating. A small few are taking advantage of the opportunities missed by most Indian restaurants and are *directly competing* in the market space *Ode às Naus* would most likely enter. All offer different variants of Indian food in different settings, but each have at least one aspect in which the start-up would aim to compete in: authenticity, value for customer service and perception, atmosphere, and communication strategy. Considering this, there are four relevant competitors that deserve to be analysed independently: Casa Nepalesa, Chutnify, Darjeeling Express and Veganapati. Refer to *Appendix 6* for detailed analysis.

The main *indirect competitors* for *Ode às Naus* are Asian fusion restaurants, which benefit from a more entrenched and developed presence in the market compared to Indian ones and are gaining increasing relevance in the Portuguese market. Moreover, the customer might be tempted to choose this type of restaurants due to more diversified menu offers (including Indian options), becoming potential product substitutes of what the authors intend to offer. The experience in these restaurants, if done correctly, can be more enriching as it taps into different cultures and cuisines. Successful examples of that are Boa Bao, Soi, Soão João.

5.2. Market Research Overview

The market research was conducted with three main goals: to gain a deep and *meaningful insight into the market* one anticipates to enter, to understand and *determine the target market segments* and to *validate previously established assumptions and hypothesis regarding the concept* based on the authors' experiences and research.

A *qualitative methodology* was employed to enable more-in-depth contextualisation of the meanings and perceptions of the market. A survey and *semi-structured interviews* were chosen as primary data sources complemented with secondary data on the different companies' operations collected from various articles and web pages.

The comprehensive survey encompassed 33 multiple choice and open-ended questions that allowed to establish the respondent's profile and gather information in three main areas of consumer behaviour and decision-making processes: *restaurants*, *home delivery* or *takeaway services*, and *ethnic and Indian restaurants*.

The interviews focused on current Indian restaurant owners and managers. A semi-structured interviewing style was adopted to allow conversation-like interactions, to get a greater understanding of the individual and their perceptions and to capture more complex ideas and nuances. Although the structure of the interviews was slightly modified through participant feedback, they can ultimately be grouped into five main areas of understanding: evaluation of *the business structure and operations* of each restaurant, *characterisation of consumer potential*, the *techniques used to retain and attract new customers*, the *critical success factors to reach differentiation and competitiveness* and the *role of authenticity* in ethnic restaurants.

Given the breadth of both the survey and the interviews, only the key insights are detailed in this section. For more detailed analysis, graphs and data refer to *Appendix 7 & 8*. Lastly, data retrieved from both sources will be used in the following sections to support relevant claims.

5.3. Survey Data Analysis

Focus was given to four demographic indicators: gender, age, nationality, and income. The 392 participants, comprised between the ages of 18 and 56, were divided into six clusters in order to better identify key differences and present relevant inferences regarding consumer mindset and behaviour per age group: 18-23 (42%); 24-29 (28%); 30-35(9%); 36-41 (6%) ;42 –47 (9%); 48-53(4%); 54-59 (2%). The reduced number of participants in older demographics, and the fact that 27% have Indian roots may skew the results. Moreover, 69% of the participants are female, 89% Portuguese, 2% Indian and 9% other nationalities. The biggest group of respondents is in the 23 to

28 bracket, female and with a monthly income inferior to 1000€.

Consumer behaviour and the decision-making process at restaurants

All age groups regarded *spending quality time with friends and family*, *celebrating special occasions* and *exploring new restaurants and flavours* as the main reasons to dine out. Some also mentioned *laziness to cook* as a motivator (47%), mainly the 45 to 47 age group. Moreover, 310 (79%) participants stated they dine out *once* or *two to three times a week*, a tendency that increases as income level also rises.

When asked to rank the factors that influence their restaurant selection, the four most selected aspects across all demographics were *friends and family recommendations, food review websites, Instagram posts* and *proximity to residence or work*. Older age groups and segments with higher income have greater regard for *friends and family recommendations* and *closeness to the place of residence and work*. In contrast, younger groups value more Instagram posts or stories of people they follow and influencers.

Regarding customer experience, participants prioritise the *menu*, the *atmosphere* and *customer service*. The 18 to 23 age bracket takes into higher account *menu, price range* and *atmosphere*. The price sensitivity decreases, and the importance of atmosphere and the menu increases as the demographic ages. Customer service expectations increase with income level, as well as the regard for menu quality and atmosphere.

Consumer behaviour regarding home delivery or takeaway services

Ordering food is not as common as initially thought, with *never or very rarely* (30%) and *one to two* times a month (40%) being the most selected options regarding ordering habits. Younger segments (24 to 35 years old) order more regularly (*1 to 2 times a month/ once a week*) than older ones. Participants identified the primary motivators to order food as *food cravings* and being *too tired to cook*. Hence, it is not surprising that their most common time to order food, both during weekdays and weekends, is dinner time.

During weekdays, the average spending per order is *less than 10€*, whereas during weekends lies between *10 and 15€*. Regardless, 50% of participants either spend *less than 10* or between *10 and 15€* in any food order. Individuals with higher income do not seem to be spending more money on their orders; this outcome is expected since higher-income tends to be directly correlated to age and older people tend to order food less.

Consumer behaviour regarding ethnic and Indian restaurants

When asked what types of restaurants they visited most, *Italian, traditional Portuguese and ethnic restaurants* ranked the highest followed by *healthy restaurants*, with choices not varying greatly between demographics. Also, only 11% stated they *never tried Indian food*, 82% either *liked or loved it* and only 7% stated they *disliked it,* or *it is indifferent*. Some referred *spiciness of the food* as the main deterrent from having tried the food in the past. From the 82% that either *liked or love Indian food*, most revealed (80%) they visit said restaurants *rarely or once in a while*. Most also agreed that they have not had a negative experience at an Indian restaurant. Nevertheless, those who did, identified *food being too spicy, poor customer service,* and *unclear complex menu* as the main reasons. From the 12% that have not tried yet, most said (88%) that they would like to have the chance to do so. They showed curiosity and interest in having new cuisine experiences.

Additionally, 80% revealed that they *had visited Indian restaurants in Portugal* (for the most referenced ones refer to *Appendix 7*). It is relevant to emphasise that, even though participants mentioned they enjoyed the experience, most could not recall specific restaurant names (26).

General perceptions of Indian food varied slightly, with most comments noting good price/quality ratio. Some pain points found amongst respondents were bad customer service experiences, lack of recommendations from waiters and those who had tried authentic Indian food mentioned westernised adaptation and similar offers amongst restaurants. International respondents also mentioned that they had not tried Indian restaurants in Portugal as they do not look appealing.

The analysis verifies that survey data is in line with the aforementioned data regarding industry trends and consumer behaviours. It also verifies previously made assumptions and grants more information regarding specific Portuguese market trends.

5.4. Expert Interviews Analysis

The main proposed goals were to gain a deeper understanding of how the businesses operate and understand if the information regarding the industry applied to them. This information was divided into five main sections. A *thematic coding approach* was used when analysing the interviews. The process encompassed the recording and transcription of the interviews, followed by the identification of common ideas between the different interviews (coding) which allowed for a *framework of thematic ideas* to be established (Gibbs, 2007). The interviewees are: Purvi and Deep Radia, manager and owner of Massala Kraft (E1&2); Jigna Sunil, manager of Kaprixu and Kasa Mia (E3) and Avni Shah, manager of Calcutá (E4).

Evaluation of the business structure and operations

All four interviewees considered that their *previous experience* in the restaurant industry and their *relatives' logistical experience* gave vital insights and were crucial for the success of the business. Three of them also had strong connections with *Indian cuisine chefs from the UK* – one of the most developed and specialised countries in this area (E1, 2 & 3). Moreover, all interviewees are *Portuguese with Indian roots*, which, in their opinion, was paramount to providing quality Indian food. The *role of the family* in all businesses was imperative, with the ownership structure of each restaurant consisting mainly of close family members. The lack of *non-Indian members* in either management or ownership may have led to a skewed opinion and lack of full understanding of what Portuguese customers want.

Furthermore, the primary source of revenue is sit-down meals. However, due to the Covid-19 pandemic, most incorporated online food delivery services, such as UberEats and Glovo, in their strategy. Regardless, the focus is *mainly on sit-down meals* due to high commissions practised by online food delivery services (approximately 30%).

Characterisation of consumer potential

Regular customer profiles vary according to the location of the restaurant. Overall, 99% of customers are *Portuguese residents*, *full-time workers* and *with middle to high level of income*. However, in highly touristic areas such as Bairro Alto, the customer base also includes *tourists*. The standard customer profile of restaurants located in residential areas is mainly residents or people working in the neighbourhood; however, *young customers are a growing target segment*. Customers usually order similar dishes and drinks in every Indian restaurant: naan, chicken tikka masala, prawn curry, mango lassi and samosas. All interviewees considered that *spiciness of the food is the most common concern* amongst Portuguese people.

Techniques used to retain and attract new customers

All regarded *WOM marketing* as their most important communication tool. Hence, maintaining strong relationships with customers and creating good experiences is critical to fuel and sustain it. According to Calcutá's owner, having a *website* was essential to attract new B2B (catering services) and B2C customers (E4). In addition, *influencer marketing* strategy, applied by Masala Kraft, was a successful tactic to attract younger customer segments. To increase affluence during lunchtime, all restaurants created a *pre-defined lunch menu* at a fixed price.

Critical success factors in reaching differentiation and competitivity

Both the managers of Calcutá and Kaprixu understand the role that wine plays in the Portuguese culture (E3&4). Hence, they focused on learning how to *pair the wine with the specific flavours of Indian food* and offer a wide variety of wines to satisfy different tastes. Regarding the most crucial factors in achieving long term success, they all shared the opinion that the *manager's constant presence at the restaurant*, *strong customer relationship* and *quality of food were the most crucial ones*. These last two aspects are also the most appreciated by the customers in all three restaurants. The critical factor common to all restaurants is a *good chef* capable of building strong relationships with the rest of the team.

The role of authenticity in ethnic restaurants

As a means to strongly adapt Indian food to the Portuguese culture, most of the restaurants have *similar menus*, and are mainly North-Indian or Goanese cuisines. They all believe to be offering something different and *do not consider the lack of authenticity a problem*. Their focus lies on trying to offer Indian food to Portuguese customers; thus, they create their menu based on what they believe Portuguese are looking for (E1&E2).

5.5. Validation of Market Opportunity

The analysis conducted, based on the survey, interviews and secondary data, validates the opportunity in the market initially expected. The survey showcased an increasing demand *for ethnic restaurants* and curiosity in having *different culinary experiences*. Indian cuisine is not as ingrained as other ethnic cuisines due to, in part, failure of Indian restaurants to build a brand and to create a thought-through communication strategy – *lack of concern about image and the use of outdated forms of marketing*. The interviews were crucial to understand where the restaurants are failing and to gather essential information for the formulation of the concept.

Moreover, the *commercialisation of Indian food* to try to suit the Portuguese customer is a strategy followed by most restaurants, *reducing the quality* of the experience for the customer and sentencing all restaurants to *similar offers*. There is a clear gap here regarding customer needs. Adaptation is not a synonym of customer needs being met. In fact, as showcased in the competition assessment, the small number of Indian restaurants competing in the premium sector achieved success by focusing on factors the majority of the Indian restaurants disregarded, such as *image, atmosphere* and *communication*, allowing them to practice higher prices. Even though the restaurant market is saturated, there is eagerness for novel concepts and well-delivered experiences, ones that tap into customer needs before the customer himself is aware. Consumers are increasingly looking for authentic and, if marketed accordingly, there is a *gap in the market for a potential new concept* of Indian restaurant in Portugal.

6. Restaurant Concept

The authors want to put culture and authenticity centre-stage by building a cohesive brand rooted in the following concept:

A restaurant is not only the food it offers but rather a wholly immersive experience. An experience that is, in itself, a combination of ambience, textures and flavours that can all be summed up in a way as a story - and that is what we are selling. We are selling a story of how once, 500 years ago, Portuguese fell in love with India. They searched for spices that transformed the Portuguese food as we know it today, and now, we go back to bring the sensory joys of Indian food. We want our customers to have a storytelling experience, the kind they want to share with their friends and family, while we tell them the story of Ode às Naus ourselves.

We are aiming for authenticity. That is the goal surrounding our project. "In an era where consumer trust has plummeted across all industries, honesty and authenticity have emerged as the most coveted attributes. Consumers, more than ever before, are holding brands to a higher standard." (Fertik, 2019) *They are looking for more than price, quality and convenience. Value for money - yes. But, above all, values: looking for innovation and different experiences whilst selecting authenticity and sustainability. And this is what we want to bring to the market.*

The story associated with *Ode às Naus*, as the name suggests, is an homage to the tumultuous discovery of the beautiful country of India by the Portuguese. The beginning of this story will be presented in the wall at the entrance of the restaurant, where people wait to be seated, and the rest of the plot will be portrayed in the walls around the restaurant through a few statement pieces, small poems and allegories. Mood boards of the branding, space, atmosphere food and tableware were created to offer a glimpse of what authors envision to offer (refer to *Appendix 9*).

The atmosphere, space and décor

Once the customer enters the restaurant, they are consumed by a singular *feeling of detachment* from the outside world. The *ambience* and *space* will welcome customers into comfort and luxury through the use of colour, light and sound.

The *space* will be inspired by warm and earthy colours. Colours like terracotta, brown-orange, saffron and emerald, coupled with neutral tones; the furniture and walls will combine seamlessly with the dark and olive greens brought by the selected plants. Dark woods, the greenery, the white marble countertops, and a mix between small, large tables and booths, will bring a sense of sequestered spaces. The goal would be to add statement pieces to the *décor* (a tiled table, armchair, wallpaper) to bring a higher sense of exclusivity. The tableware and service ware will complement Indian food in an appealing way and will be chosen to contrast with the countertops, creating a great setting for taking pictures. The *ambience* will be characterised by dim golden lights with lo-fi Indian music on the background. It will bring a sense of privacy and intimacy to each group of customers.

Moreover, there will be a small bar where customers can wait for their tables and a hall at the entrance that separates those waiting to be seated and the delivery and takeaway services from the remainder of the customers. Also, Indian restaurants are often associated with lack of hygiene and overall kitchen disorderliness; hence, a semi-open kitchen will be installed for greater transparency.

Customer service

The service will not only be refined but welcoming with true *Indian princely hospitality*. The service style emphasises hospitality and warmth with knowledgeable, technically proficient staff who are present yet unobtrusive. The uniforms will speak to the theme of the restaurant and will be inspired on the colour palette, thus contributing to the overall ambience while remaining utilitarian.

Menu ideas and design

Each dish is inspired by a different part of India, celebrating diverse regional methods of cooking. The designed menu caters to *several dietary needs* and fits the increasingly growing trend of vegetarianism and is available in both Portuguese and English.

Indian restaurants usually have long complicated menus, that not only make their kitchen flow more convoluted, but can also overwhelm the customer and amount to longer decision periods. By *streamlining the menu*, one can improve the quality of the product and the order time for the customers (Littman & Liem, 2020). The dishes chosen in the sample menu (refer to *Appendix 10*) follow this approach, by focusing on a limited number of quality dishes (seven to eight in each section, 1/5 of the average Indian restaurant offers), less usual in Portugal, traditional but chosen individually to portray different flavours. Each has a carefully worded description to feed the customers' imagination and entice them to try. Focus is also given to the way food is presented, considering that Indian cuisine is not one of the most innately appealing, innovative ways to serve were also in mind when choosing this versatile menu.

Moreover, due to the importance of wine in the Portuguese culture, and as mentioned in the experts' interviews (E3), a carefully curated wine list is presented to complement the unique flavours of Indian food, beyond the traditional Indian alcoholic and non-alcoholic beverages chosen. Wine pairing is taken seriously, as it is in the authors belief that wine is an excellent complement to the complexity and traditions of Indian cuisine.

In sum, there is a *common and purposeful vision* that connects the whole image of the brand and its merchandise; this goes from what the staff wears to service ware and even delivery boxes.

7. *Ode às Naus*: Foundational Elements

7.1. Mission & Vision

Mission – Ode às Naus aims to deliver a unique experience of Indian culture and cuisine, rooted in authentic values, to adventurous food seekers.

Vision – Ode às Naus will establish itself as the must-go-to place for an authentic Indian food experience.

7.2. Values

The experience offered is the ultimate product. The goal is to build a strong brand experience with due patience and care, embedded in three core values: *authenticity*, *sustainability* and *customer experience*. These values will guide the entire strategy for the brand.

Authenticity

"Restaurant authenticity refers to the degree to which the customer perceives the restaurant's food and overall environment to be congruent with the culture in question" (Jang, et al., 2011; Liu & Jang, 2009). A study conducted by Lu et al., particularly focused on *ethnic restaurants*, deemed that the restaurant's sensed authenticity positively affected the degree of customer brand awareness and image, as well as perceived brand quality (2015). The research conducted, including the survey, strongly indicated that *authenticity is an increasingly important attribute* sought by consumers.

The lack of authenticity in existing Indian restaurants in Portugal was one of the motivators behind creating this concept – weary of how India is being portrayed and a desire to escape commercial food offers. The food, space, ambience, the whole idea was based on wanting to provide an authentic experience to the customer – authentic, not *clichéd*. With authenticity as a core value, one intends to showcase diversity through *innovative*, *creative* and *more diverse* food offers.

Sustainability

Research has shown that there is an increasing concern over, and demand for, conscious dining experiences. With the emergence of three interrelated trends – a decline of the planet's natural resources, a greater need for transparency and growing consumer expectations. Thus, implementing sustainable practices is vital for the *long-term health and success of the brand* (Haanaes, 2016).

By putting sustainability at the core of the brand, one can reduce its social and environmental impacts while also appealing to a new demographic of customers (Prigge, 2017). Focus was given to two key aspects: *sourcing* and *daily practices*.

Sustainable procurement policies are key when sourcing food, materials and equipment. When choosing equipment, priority will be given to *eco-friendly* options, even though it may present higher initial costs, it has far-reaching long-term benefits, especially in terms of energy consumption. Regarding ingredients, focus is set on fomenting partnerships with *local suppliers* for fresh local ingredients. All the materials used for packaging and merchandising will be made from *recycled materials* and come with minimal or sustainable packaging, for instance, the use of *seed paper* to replace traditional receipt paper.

Regarding daily practices, the focus will lie in reducing and appropriately dealing with waste. The management of stocks will be carried out digitally to *avoid waste*. Several initiatives have been preliminarily planned to be implemented and are detailed in *Appendix 11*.

By putting sustainability centre, one can benefit from positive brand perception, a larger customer base, greater employee engagement, a quality-driven menu and an overall more *efficient supply chain* (Aaron Allen , 2015). Research also indicates that customers are willing to pay more for sustainable dining (Namkung & Jang, 2014). The sustainable practices selected are cost-effective, particularly in the long run.

Customer Experience

To deliver exceptional, consistent, engaging, memorable experiences that drive a connection to the brand is at the core of *Ode às Naus*. Quality food and friendly staff is a basic expectation from most customers. In order to successfully compete, one must be able to truly *engage and listen to the customers* – to be able to gather insights routinely and act on them rapidly, at a local level, in the hands of the frontline staff (Khan, et al., 2020). In this competitive, fast-moving space, differentiation will come from creating a restaurant's *digital DNA* that focuses on *engaging, empowering, hearing, delighting,* and *knowing* the guests (Reichheld, et al., 2020). These five aspects drove the whole brand strategy and allowed for the development of a target customer experience strategy. In practice, this will be divided into three key areas: *insights, digital* and *employee engagement*. The first two areas will be detailed in the communication strategy and product offers sections, whereas the latter will be in the human resource section.

8. Product and Service Offers

The restaurant is inserted in the *premium casual dining* segment and will operate in the accommodation and restaurant sector as a full-service restaurant (CAE 56, 561).

There will be three main services being offered that constitute the business's three revenue streams: *sit-down, takeaway* and *online food delivery services*. Sit-down meals will represent the biggest revenue source. Regarding takeaway, the customer will have the option to either order at the time of pick-up or to *click and collect* through the restaurant's website where they can pre-order the meal, choose a specific time and pre-pay, increasing convenience and optimising the restaurant's fulfilment capacity. And lastly, food delivery service through either UberEats or Glovo. These two companies are two most popular food delivery apps in the country as it was confirmed by the survey that indicated UberEats as the most used delivery app/ method (35%) followed by Glovo (21%) and direct restaurant takeaway (18%). The platforms will have available a limited menu, including only the dishes that one can ensure will withstand the delivery process without risking quality and will be slightly higher priced than at the restaurant to minimise the cost of using the services.

Overall *product offers* have been detailed in the menu design section and were selected to fit several growing customer needs and expectations (for instance gluten-free, vegan and vegetarian dishes). Several interviewees mentioned the *heaviness of the food* to be a factor for decreased summer sales and that the creation of an executive menu generated growth during an expectedly lower sales' period. Thus, *Ode às Naus* will have an adapted *Summer menu*, by replacing some hot dishes with more refreshing ones, without compromising its authenticity, to minimise the seasonality effect. An *executive lunch menu* will also be created to be available during weekdays.

The *pricing strategy* takes into account, as benchmarks, the prices practised by other premium ethnic restaurants and other premium casual restaurants, as well as the predicted purchasing power of the target market. The average price per meal at lunchtime will be set between 15 and 20€ given the existence of the executive menu, and dinner will be set between 20 and 30€ (including VAT). Price points are higher than the average Indian restaurants but match the few premium casual restaurants currently open in Portugal. The differentiation of both the product and service offered, in terms of quality and authenticity, justifies this pricing strategy. Takeaway and online food orders are expected to average between 12 and 17€.

Several added services have been chosen to address crescent trends and customer needs, especially regarding convenience and technology advancements. Customers will be able to *book a table online*, on the website or TheFork, and to minimise queueing times they will also be able to *queue online*. *Cashless payments* will include MBway, and for ease in splitting the bill, the receipt will appear on a tablet and allow the customers to split the bill before the waiter comes to collect. To encourage diversity, inclusion, awareness and interest about Indian culture, the business will also *host celebrations and special events* for all major cultural and religious festivals.

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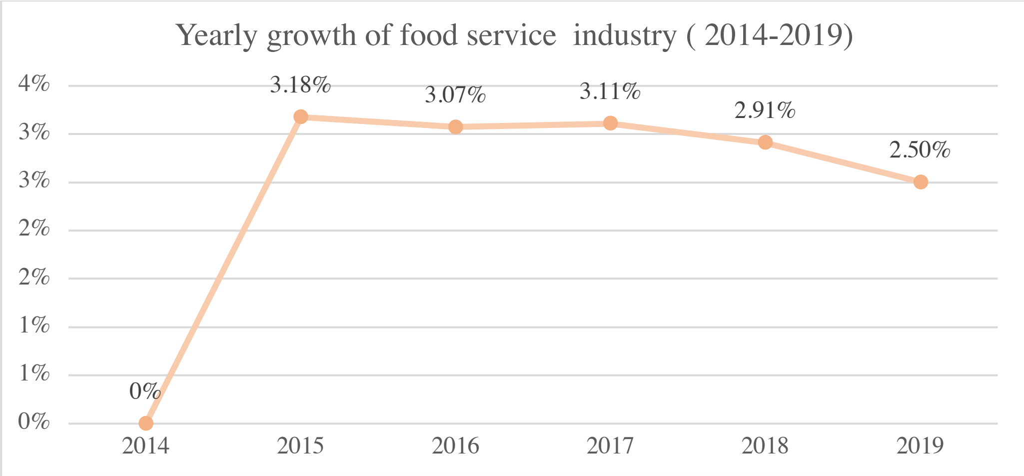
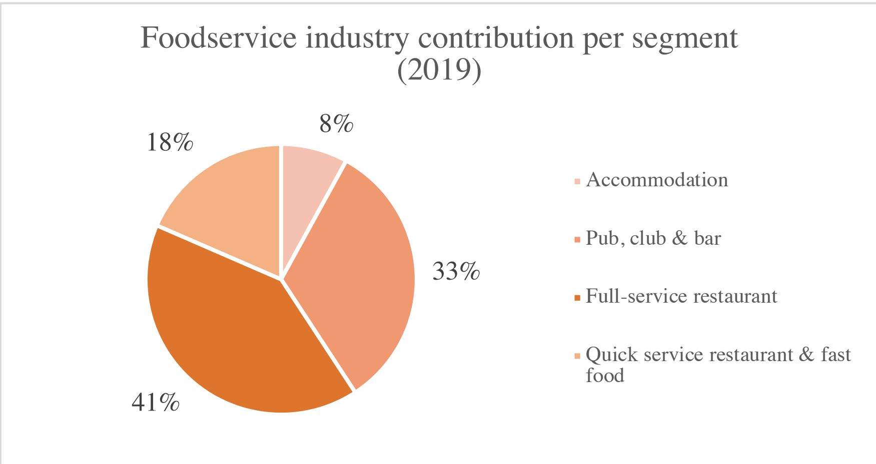
10. Appendices

***Appendix 1:** Yearly growth of food service industry in Portugal, 2014 to 2019*



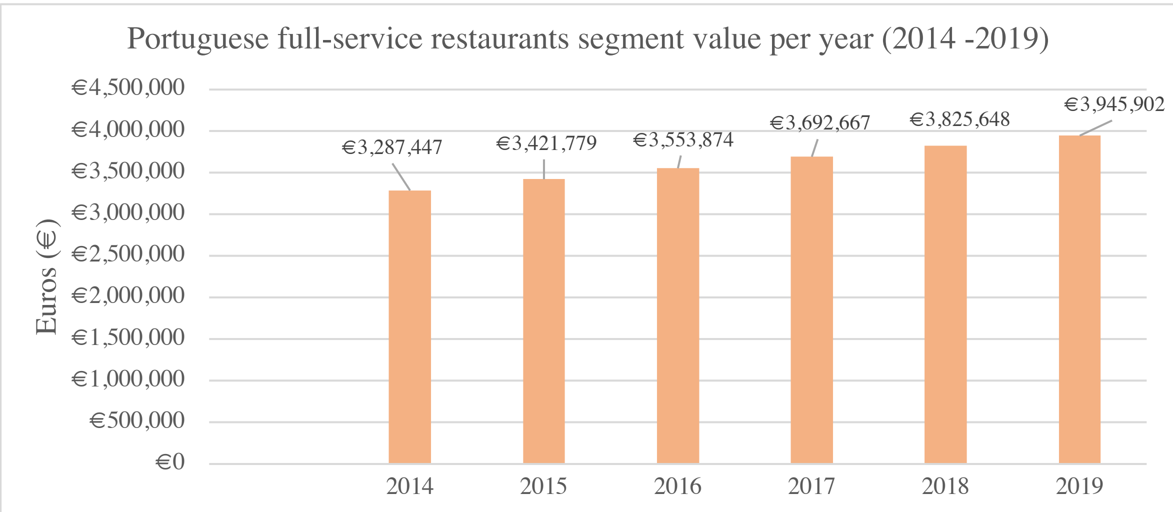
(MarketLine, 2020)

***Appendix 2:** Foodservice industry contribution per segment in 2019*



(MarketLine, 2020)

Appendix 3: Portuguese full-service restaurants revenues per year, 2014 to 2019



(MarketLine, 2020)

Appendix 4: *Analysis of current Indian restaurant offers in Lisbon and Porto*

Lisbon								
Restaurant Name	**Type of service**	**Type of cuisine**	**Average price for 2 people**	**Pricing Range**	**Location**	**Website presence**	**Instagram presence**	**Nº of followers**
A chamuçaria	Fast Food	Indian	25 €	Low	Tellheiras	https://achamucaria.pt/	https://www.instagram.com/achamucaria	2508
Aashiana	Casual	Indian Commercial	25 €	Low	Carcavelos	http://ashianarestaurante.com	N/A	N/A
Annapurna	Casual	Nepalese	30 €	Medium	Anjos ; Arroios	https://annapurna.com.pt	https://www.instagram.com/annapurna_restaurantes/	8543
Aradhana	Casual	Nepalese	20 €	Low	Alvalade	N/A	N/A	N/A
Aroma	Casual	Indian & Thai	20 €	Low	Cascais	N/A	N/A	N/A
Atitihi	Casual	Indian Vegetarian	25 €	Low	Parque das Nações	N/A	https://www.instagram.com/atithilisboa/	958
Bengal Tandoori	Casual	Bengali	30 €	Medium	Avenida da Liberdade	https://bengaltandoori.pt	N/A	N/A
Bollywood Lounge	Casual	Indian Commercial	30 €	Medium	Marquês Pombal	N/A	https://www.instagram.com/bollywood.lounge	1908
Bollywood Tadka	Casual	Indian Commercial	25 €	Low	Algés	N/A	N/A	N/A
Calcutá	Casual	Indian Commercial	30 €	Medium	Bairro Alto	http://restaurantcalcuta.com	N/A	N/A
Cantina Indiana	Fast Casual	Gujarati	20 €	Low	Telheiras	N/A	N/A	N/A
Cantinho da Paz	Casual	Goanese	38 €	Medium	São Bento	N/A	N/A	N/A
Casa Indiana	Casual	Indian Commercial	25 €	Medium	Alcantara	N/A	N/A	N/A
Casa Nepalesa	Casual	Nepalese	50 €	High	Praça de Espanha	https://www.casanepalesa.pt	https://www.instagram.com/casanepalesalisboa	2375
Caxemira	Casual	Indian Commercial	30 €	Medium	Baixa; Parque das Nações	N/A	https://www.instagram.com/caxemiraexpo/	86
Chutnify	Casual	Indian Commercial	45 €	Medium	Principe Real; Bairro Alto	https://www.chutnify.com/	https://www.instagram.com/chutnifyportugal	3749
Cinnamon	Casual	Goanese	20 €	Low	São Joao; Parede	N/A	https://www.instagram.com/cinnamon_restaurante/	140
Comida Goesa by Tessa	Casual	Goanese	25 €	Low	Paço de Arcos	N/A	N/A	N/A
Costa do Malabar	Casual	South Indian	20 €	Low	Arroios	https://www.costadomalabar.com	https://www.instagram.com/costadomalabar/	439
Delhi Darbar	Casual	Indian Commercial	30 €	Medium	Alvalade	N/A	https://www.instagram.com/restaurantes_delhidarbar	114
Desi Thali	Fast Casual	Indian Vegetarian	20 €	Low	Anjos	N/A	https://www.instagram.com/desi.thali.lisbon/?hl=em	126
Everest Montanha Chain	Casual	Indian & Italian	25 €	Low	Rossio; Alvalade; Rato	https://everestmontanha.pt	https://www.instagram.com/everestmontanhapt	32
FishTail Restaurante	Casual	Nepalese Vegetarian	20 €	Low	Campo Pequeno	https://fishtail.pt	N/A	N/A
Gandhi Palace	Casual	Indian & Italian	30 €	Medium	Bairro Alto; Baixa; Restelo; Cascais	http://www.gandhipalace.pt	https://www.instagram.com/gandhi_palace_cascais/	55
Ganesh Palace	Casual	Indian & Italian	25 €	Medium	Rato	https://ganesha-palace-indian-restaurante.business.site	N/A	N/A
Ghoroa Restaurante	Casual	Indian Commercial	25 €	Low	Moraria	N/A	https://www.instagram.com/ghoroa.restaurant	2066

Gurkha	Casual	Nepalese	25 €	Low	São Bento; Saldanha	https://gurkha-restaurant-bar.eatbu.com	https://www.instagram.com/gurkha_restaurant_and_bar/	1311
Haweli Tandoori	Casual	Goanese	30 €	Medium	Graça	https://haweli-tandoori.business.site	https://www.instagram.com/hawelitandoori	15
Indi go Indian Flavours by Real Indiana	Fast Food	Indian Commercial	14 €	Low	Amoreiras Shopping Center	N/A	https://www.instagram.com/indi_go_rest	744
India Gate	Casual	Indian Commercial	30 €	Medium	Cais	N/A	https://www.instagram.com/restauranteindiagate	159
Indian Dreams	Casual	Indian & Italian	20 €	Low	Benfica	https://indian-restaurante-benfica-lisboa.business.site	N/A	N/A
Indian Flavour	Casual	Indian Commercial	25 €	Low	Cascais	https://indianflavour.eatbu.com	N/A	N/A
Indian Grace	Casual	Indian Commercial	30 €	Medium	Carnaxide	https://www.indiangrace.pt	https://www.instagram.com/restaurante_indiangrace	61
Indian Palace	Casual	Indian Commercial	20 €	Low	Sintra	N/A	N/A	N/A
Indian Spice Square	Casual	Indian Commercial	30 €	Medium	Telheiras	https://indian-spicesquare.business.site	N/A	N/A
Jesus é Goes	Casual	Goanese	40 €	Medium	Avenida da Liberdade	N/A	https://www.instagram.com/jesusegoesoficial/	1443
Kaprixu	Casual	Indian Commercial	30 €	Medium	Telheiras	N/A	https://www.instagram.com/restaurant_kaprixu/	489
Kerala	Casual	South Indian	25 €	Low	São João	https://www.keralarestaurante.com	https://www.instagram.com/keralarestaurantlisbon/	604
Little Nepal	Casual	Nepalese	20 €	Low	Sacavem	N/A	N/A	N/A
Maharaja	Fast Casual	Indian Commercial	40 €	High	Pena	N/A	N/A	N/A
Masala	Casual	Indian Commercial	30 €	Medium	Cascais	http://www.restaurantemasala.pt	https://www.instagram.com/masalacascais/	46
Masala kraft	Casual	Indian Commercial	25 €	Low	Alvalade	N/A	https://www.instagram.com/masala_kraft/	338
Mayura	Casual	Indian Commercial	35 €	Medium	Alges; Cascais	N/A	N/A	N/A
Mister India	Casual	Indian Commercial	20 €	Low	Campolide	N/A	https://www.instagram.com/misterindiarestaurant/	380
Namastay India	Casual	Indian Commercial	25 €	Low	Massama	N/A	N/A	N/A
Natraj	Casual	Indian Commercial	30 €	Medium	Campo de Ourique; Birre; Odivelas	http://www.restaurantenatraj.com	https://www.instagram.com/natraj_tandoori/	74
Nepal Maya	Casual	Nepalese	30 €	Medium	Alcantara	N/A	N/A	N/A
Nepon Indian	Fast Casual	Indian & Portuguese & Chinese	20 €	Low	Arroios	N/A	N/A	N/A
New Himalaia	Casual	Nepalese	21 €	Low	Avenida da Liberdade	https://newhimalaia.eatbu.com	https://www.instagram.com/newhimalaia/	100
Nur by Chef Khan	Casual	Indian Vegetarian	40 €	Medium	São Domingos de Benfica	N/A	https://www.instagram.com/nurbychefkhan/	N/A
Olá Nepal	Fast Casual	Nepalese	20 €	Low	Marques Pombal	N/A	https://www.instagram.com/olanepal/	2
Palácio de Buda	Casual	Nepalese	20 €	Low	Campo Pequeno	N/A	N/A	N/A
Passage to India	Casual	Indian Commercial	30 €	Medium	Saldanha	https://www.passagetoindia.pt	https://www.instagram.com/passagetoindia_lisbon_portugal/	584
Pic Nic I & Pic Nic II	Casual	Indian & Italian	28 €	Medium	Sintra; Mem Martins	http://www.sintra.picnic.pt	N/A	N/A
Real Indiana Expo	Casual	Indian Commercial	45 €	High	Parque das Nações	https://www.realindiana.pt	https://www.instagram.com/real_indiana/	470
Refeitório Associativo Hare Krishna	Fast Casual	Indian Vegetarian	16 €	Low	Saldanha	http://www.iskcon.pt/atividades-lisboa/refeitorio-associativo	N/A	N/A

Royal Spice	Fast Casual	Nepalese	25 €	Low	Marquês de Pombal	N/A	https://www.instagram.com/royalspice127/	62
Ruchi	Casual	Indian Commercial	25 €	Low	Telheiras	N/A	N/A	N/A
Sabores de Goa	Fast Casual	Goanese	25 €	Low	Anjos	https://www.saboresdegoa.com	https://www.instagram.com/saboresdegoa/	67
Segredos de Goa	Casual	Goanese	25 €	Low	Campo de Ourique	N/A	https://www.instagram.com/restaurante_segredos_de_goa/	2744
Shangrilla	Casual	Nepalese	26 €	Low	Carcavelos	N/A	N/A	N/A
Shree Ram Restaurante Indiano	Casual	Indian Vegetarian	25 €	Low	Saldanha	http://www.shreeramrestaurant.com	https://www.instagram.com/shree_ram_restaurant	270
Spice Hut	Fast Casual	Indian Commercial	25 €	Low	Intendente	N/A	https://www.instagram.com/spicehut_tandoori/	9
Swaagat The Taste of India	Casual	Indian Vegetarian	25 €	Low	Baixa	N/A	N/A	N/A
Taj Mahal	Casual	Indian & Italian	30 €	Medium	Cascais	http://www.restaurantetajmahal.pt	https://www.instagram.com/tajmahal__cascais/	65
Tamarind	Fast Casual	Indian & Italian	40 €	Medium	Avenida da Liberdade	http://tamarindrestaurantes.com	https://www.instagram.com/tamarind_lisbon/	1683
Taste of India	Fast Casual	Indian Commercial	30 €	Medium	Benfica	N/A	https://www.instagram.com/tasteofindiapt/	421
Tentações de Goa	Casual	Goesa	30 €	Low	Mouraria	N/A	N/A	N/A
The Darjeeling Express	Fast Casual	Contemporary Indian Mozambican	32 €	Medium	Benfica	https://www.thedarjeelingexpress.com/	https://www.instagram.com/thedarjeeljngexpress/	2608
Veganapati	Casual	Indian Vegetarian	25 €	Low	Baixa	www.veganapati.pt	https://www.instagram.com/veganapati/	7764
Zaafran by Chef Khan	Casual	Indian & Portuguese Fusion	40 €	Medium	Saldanha	https://restaurante-zaafran.negocio.site/	https://www.instagram.com/zaafran_pt/	1092

Porto								
Restaurant Name	**Type of service**	**Type of cuisine**	**Average price for 2 people**	**Pricing Range**	**Location**	**Website**	**Instagram**	**Nº of Followers**
Bollywood Urban Taste	Casual	Indian Commercial	25 €	Low	Cedofeita	N/A	N/A	N/A
Swaad	Casual	Indian Commercial	25 €	Low	Matosinhos Centro	N/A	https://www.instagram.com/restaurante_swaad/	287
Indian Punjabi	Casual	Indian Commercial	25 €	Low	Povoa de Varzim	bit.ly/IndianPunjabiBio	https://www.instagram.com/indian_punjabi_pt/	53
Thali	Casual	Indian Commercial	30 €	Medium	Baixa	http://thali.com.pt	https://www.instagram.com/thali_aromasesaboresdaindia/	133
Indian Tandoori	Casual	Indian Commercial	30 €	Medium	Campanhã	N/A	N/A	N/A
Indian Palace	Casuall	Indian Commercial	25 €	Low	Aldoar	N/A	N/A	N/A
Chutnify Canteen	Fast Casual	Indian Commercial	30 €	Medium	NorteShopping	https://www.chutnify.com	https://www.instagram.com/chutnify.canteen/	469
Indi Go Indian Flavours	Fast Casual	Indian Commercial	20 €	Low	Arrabida Shopping	N/A	https://www.instagram.com/indi_go_rest	744
Mendi	Premium Casual	Indian Commercial	60 €	High	Boavista	https://www.mendi.pt	https://www.instagram.com/mendi.restauranteindiano/	111
Real Indiana	Premium Casual	Indian Commercial	45 €	Medium	Foz & Vila Nova de Gaia	https://www.realindiana.pt	https://www.instagram.com/real_indiana/	470
Sabores & Açores	Casual	Indian & Portuguese Fusion	15 €	Low	Centro Comercial Bombarda	https://saboreseacores.eatbu.com	N/A	N/A

Appendix 5: Examples of current Indian restaurant offers in Portugal

Olá Nepal

Annapurna

Everent Montanha

Shangrilla

Aashiana

restaurante
GHOROA
fresco · rápido · saboroso
fresh · fast · tasty

PRATOS PRINCIPAIS
MAIN DISHES

CARIL | CURRY
Prato tradicional indiano resultado da combinação entre várias especiarias
Tradicional Indian dish result of the combination of various spices

Vindaloo
Caril cujo nome resulta da concentração da expressão vinha d'alhos, tempero levado pelos marinheiros portugueses na época dos descobrimentos e posteriormente adaptado ao gosto local, complementando com malaguetas e especiarias (muito picante)
Curry whose name derives from the concentration of the expression vinha d'alhos, seasoned by the Portuguese sailors at the time of the discoveries, and later adapted to the local taste, complemented with chorizo and spices (very spices)
Frango | Chicken .... 7,90€ Borrego | Mutton .... 8,90€
Vaca| Beef .... 8,50€

Tikka Massala
Caril de frango a base de mistura de especiarias tradicional .
Curry based on traditional spice blend .
Frango | Chicken .... 7,90€ Borrego | Mutton .... 8,80€
Camarão | Prawn .... 9,90€

Dopiaza
Caril de frango e cebola, cujo nome significa "duas cebolas" pois estas são adicionadas no início e na finalização do prato .
Curry and onion, whose name means "two onions" as these are added at the beginning and at the end of the dish .
Frango | Chicken .... 7,80€ Borrego | Mutton .... 8,70€
Camarão | Prawn .... 9,50€ Vaca | Beef .... 8,50€

Ghoroa

4. Saag Pat Pakora .... € 2,75
Pedaços de batata, beringela e couve flor envoltos em massa de farinha de grão e frito
Deep-fried chooped potato, aubergine and cauliflower dipped in chickpea flour batter

5. Chicken Pakora .... € 3,65
Pedaços de frango envoltos em massa de farinha de grão e fritos
Deep-fried pieces of chicken dipped in chickpea flour batter

6. Chicken Momo .... € 4,00
Carne Picada de frango em massa de farinha cozida em vapor de água
Dumplings

7. Fish Pakora .... € 4,00
Pedaços de peixe envoltos em massa de farinha de grão e fritos
Deep-fried fish dipped in chickpea flour batter

8. Prawn Pakora .... € 4,25
Gambas envoltas em massa de farinha de grão e fritas
Deep-fried prawns dipped in chickpea flour batter

9. Dal Soup .... € 2,60
Sopa tradicional de lentilhas
Traditional lentil soup

10. Vegetable Soup .... € 2,60
Sopa de Legumes

11. Chicken Soup .... € 2,85
Sopa de Galinha

12. Mixed Salad .... € 4,00
Salada de tomate, alface, cenoura, pepino e pimentos
Tomato, lettuce, carrot, cucumber and bell peppers salad

Bengal Tandoori

Source: Zomato and TheFork

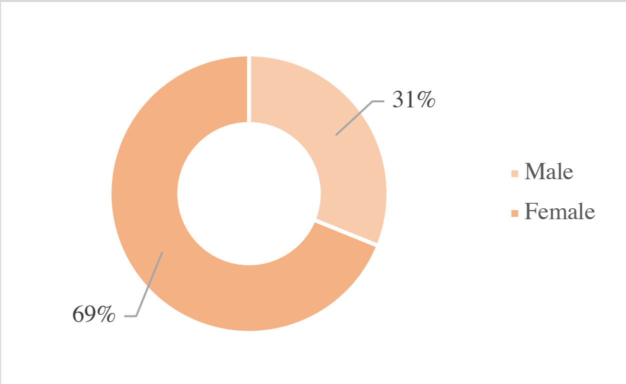
Appendix 6: Direct Competitors Detailed Analysis

Casa Nepalesa	**Casa Nepalesa** is an Indian Nepalese restaurant located in Praça de Espanha, Lisbon. The dishes are very rich in taste and very well presented. In addition, the restaurant has a very clean design whilst remaining authentic to its roots of a typical Nepalese house. There is a great focus on customer service: the staff wears a specific uniform and are highly knowledgeable about the menu and are very helpful towards the customers. The average price paid per person is 25€, clearly higher than the average price paid in the Indian restaurants of 15€.
Chutnify	**Chutnify** is a German Indian food chain with three locations in Portugal: two in Lisbon and one in Porto. Contrary to the above-mentioned restaurants, they have a very modern decoration with old Bollywood movies as a theme, offer a very appealing dish presentation and attractive and straightforward menu. The chain presents two different concepts in terms of service provided: casual and quick service (Chutnify Canteen in Porto). Chutnify has a robust marketing strategy and online presence, as their Instagram account has more than 3,000 followers. The average price per meal per person is 22,5€. So far, Chutnify is gaining strong brand positioning in Portugal as a reference in the Indian restaurants' segment.
Darjeeling Express	**Darjeeling Express** is an Ismaili family-owned restaurant which offers Indian food with a Mozambican twist, a vibrant and flavour combination according to Zomato and TheFork reviews. The fast-casual restaurant is located in Benfica (Lisbon) and has very modern and cosy decoration, given the use of warm colours and Old Indian Railway as the theme of the decor. The average price paid per person is 16€. One of its most significant competitive advantages is its approach to sustainable practices, for instance, the use of environmentally friendly food packaging and other meal utensils such as their edible ginger straw. However, their online marketing strategy, for example, on Instagram they lack quality posts and regular activity.
Veganapati	**Veganapati** is a vegan restaurant that offers adapted Indian Street food, and it is located in Baixa-Chiado, Lisbon. The decoration follows a clean design, with a strong nature component in their atmosphere, tapping into modern consumers' preferences. Furthermore, they pursue a strong marketing strategy, with professional photographs of both the establishment and the dishes, available in every online platform, in addition to an attractive and engaging menu. Currently, their Instagram account has more than 7000 followers, and it is probably one of the few restaurants in this segment that employs the influencer marketing strategy.

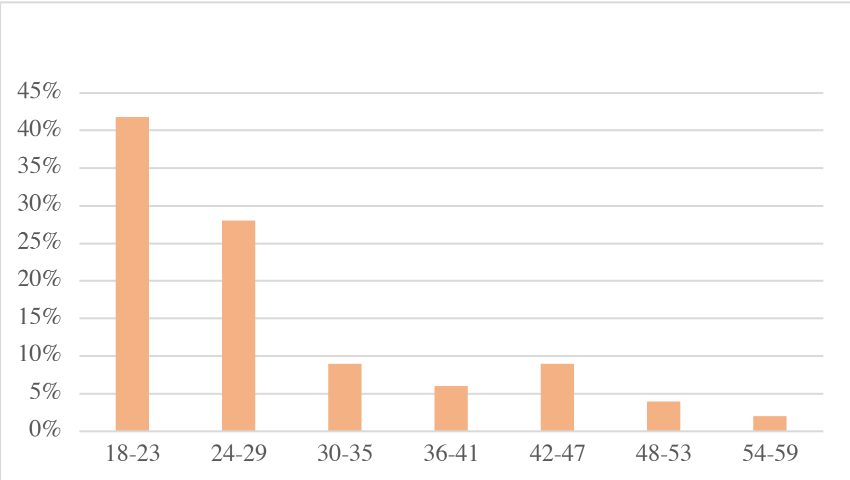
Appendix 7: Survey results and analysis

Some of the questions have additional considerations or inferences about the data.

Question 1: Gender



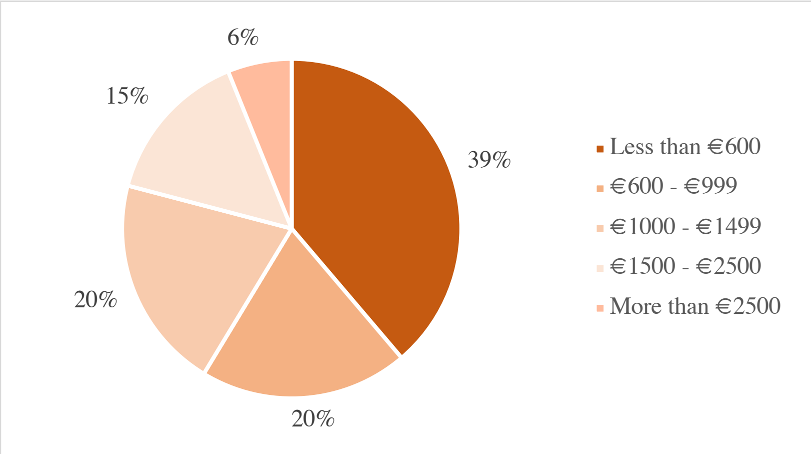
Question 2: Age



Question 3: Nationality

Nationality	Count	Percentage
Austria	2	0.5%
Croatian	2	0.5%
French	2	0.5%
Guinean	2	0.5%
Maltese	2	0.5%
Mozambican	2	0.5%
Polish	2	0.5%
Brazilian	4	1.0%
Italian	6	1.5%
Indian	8	2.0%
German	10	2.7%
Portuguese	350	89.3%
Total	392	100%

Question 4: Monthly Income/Allowance (€)

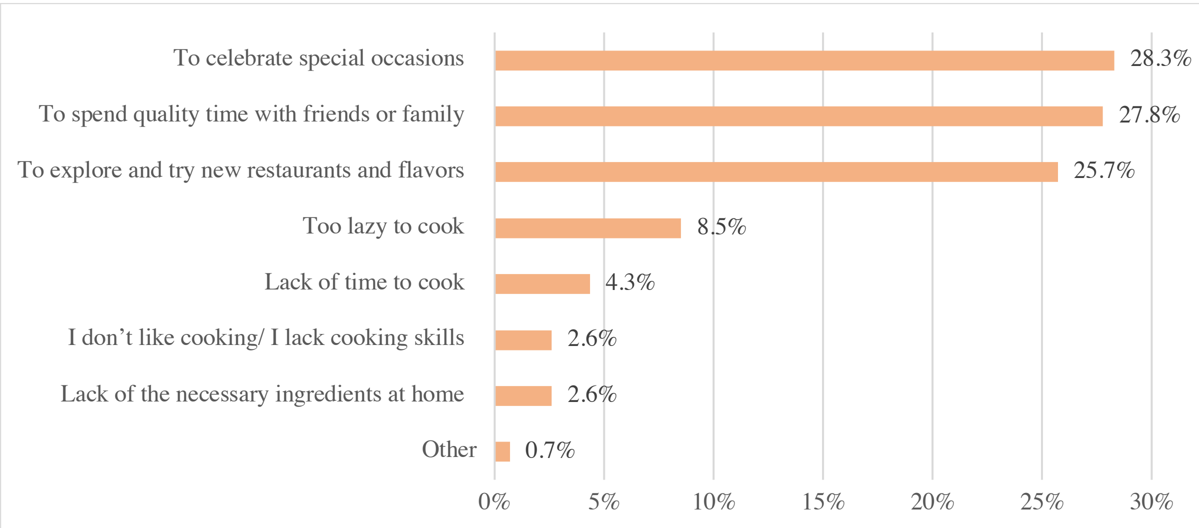


Question 5: Do you enjoy eating out?

Metric	Count	Percentage
Yes	384	98%
No	8	2%
Total	392	100%

**If answer was "Yes": move to Question 6. If answer was "No": move to Question 7.*

Question 6: Why do you usually decide to eat out? Please, choose 3 options.



Total Count: 1152 responses (More than 1 option was selected by participant)

Considerations: All age groups regarded *spending quality time with friends and family*, *celebrating special occasions* and *exploring new restaurants and flavours* as the main reasons to eat out. Some also mentioned laziness to cook as a motivator, mainly the 45 to 47 age group (47% of said group).

Question 7: Why do you usually decide not to dine out? Please, choose up to 3 options.

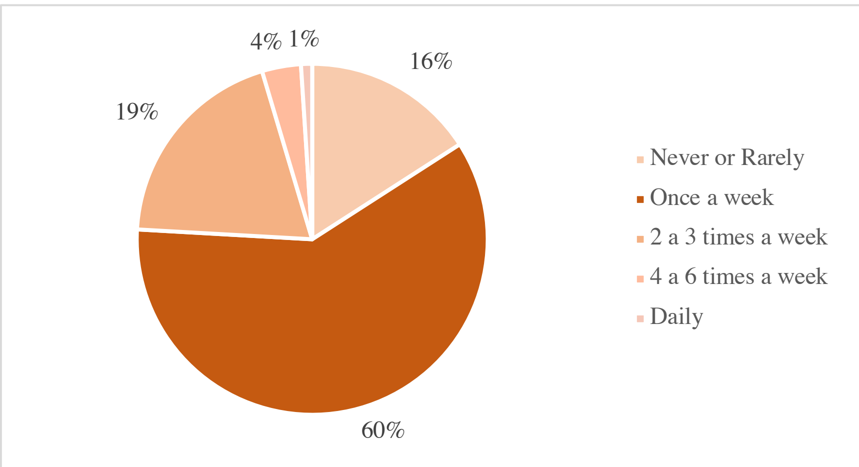
Metrics	Count	Percentage
Cooking at home is usually much cheaper	8	40%
I don’t like spending money eating out	6	30%
Cooking at home is usually healthier	4	20%
Currently, I can't afford to eat out frequently	2	10%
Restaurants are not usually transparent about ingredients and cooking processes	0	0%
I don’t like the current market offers	0	0%
Most of the food offers involve processed food or lack of fresh ingredients	0	0%
I am vegan or vegetarian and the offers are usually limited	0	0%
Other	0	0%
Total	20	100%

Question 8: When you travel, you...

Metrics	Count	Percentage
Prefer to eat out, because you want to explore the country’s gastronomy and culinary offers	212	54.1%
Prefer to find a balance: eating out sometimes and cooking others, to save money	130	33.2%
Prefer to eat out, because you don’t want to waste time cooking	24	6%
Prefer to book the all-inclusive option at the hotel, to save time and stress	10	2.6%
I don’t travel	10	2.6%
Prefer to always eat in, in order to save money	4	1%
Other	2	0.5%
Total	392	100%

Considerations: All demographic groups showed a preference for eating out to explore the country’s gastronomy and culinary offers when travelling, except the 48 to 53 age group, and those with an income level below 600€, who *prefer to find a balance between eating out and cooking in order to save money* while travelling.

Question 9: How frequently do you eat out at restaurants?



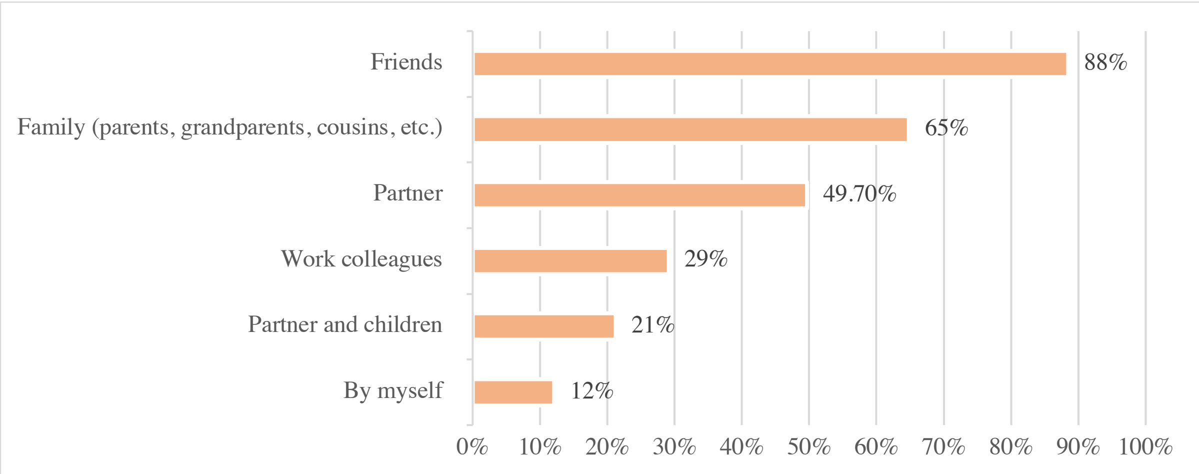
Total Count: 392 responses

		How frequently do you eat out at restaurants?						
		Never or very rarely	Once a week	2 to 3 times a week	4 to 6 times a week	More than 6 times a week	Daily	Total
Monthly Income/ Allowance (€)	< €600	64.5%	38.5%	23.7%	28,6%	0%	0%	38.8%
	€600 - €999	16.1%	20.5%	21.1%	28,6%	0%	0%	19.9%
	€1000 - €1499	12.9%	19.7%	31.6%	0,0%	100%	0%	20.4%
	€1500 - €2500	6.5%	16.2%	13.2%	14,3%	0%	100%	14.8%
	> €2500	0%	5.1%	10.5%	28,6%	0%	0%	6.1%

Considerations: 79% of participants stated they ate out *once* or *two to three times a week*. One can see that the frequency of dining out increases as the level of income increases.

If answer was "Never or very rarely": move to Question 16.

Question 10: With whom do you usually go out to eat? Please select up to 3 options.

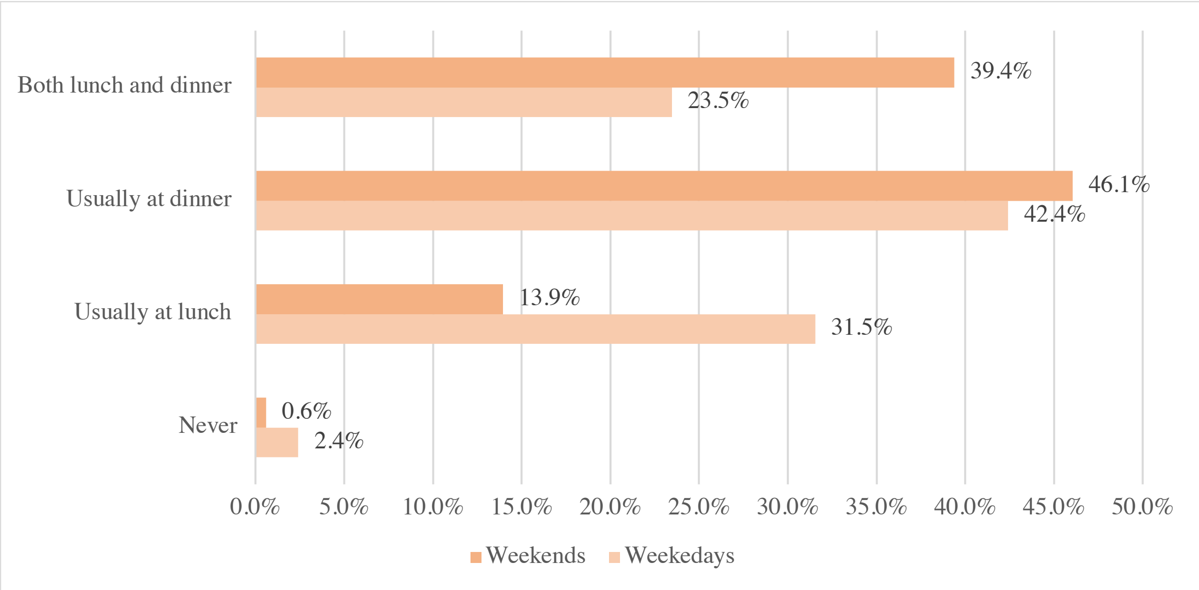


Total Count: 876 responses (More than 1 option was selected by participant)

		With whom do you usually go out to eat?						
		Partner	Partner and children	Family	Friends	Work colleagues	By myself	Total
Age	18 - 23	43.9%	8.6%	47.7%	39.7%	16.7%	40%	37.4%
	24 - 29	35.4%	5.7%	29%	28.8%	25.0%	30%	27.9%
	30 - 35	7.3%	8.6%	7.5%	9.6%	12.5%	15%	9.1%
	36 - 41	4.9%	11.4%	2.8%	5.5%	14.6%	5%	6.2%
	42 - 47	6.1%	37.1%	6.5%	11.0%	22.9%	10%	12.3%
	48 - 53	1.2%	14.3%	4.7%	3.4%	2.1%	0%	3.9%
	54 - 59	1.2%	14.3%	0.9%	1.4%	4.2%	0%	2.5%

Considerations: The 18 to 35 age group prefers to dine out with *friends*, *family* and *partner*. There is a tendency for *work colleagues* to grow as an option in older segments. The group comprised between 36 to 59 years shifts to *friends, work colleagues and partner and children*. Both genders have similar tendencies, except that women are less likely to go with *work colleagues* or *by themselves* compared to men. Higher-income participants have a higher tendency to dine out with *partner and children* compared to other levels of income.

Question 11: When are you more likely to go to restaurants?



Total Count: 330 responses

Considerations: *Dinner* is the most likely time people choose to dine out regardless of it being a weekday or weekend. During weekdays, younger people prefer to have *dinner,* and as the demographic gets older, they move towards *lunch*. During weekends, all age groups prefer to have *dinner* out, or *both*. Lower income participants prefer to have *lunch* out during weekdays, whereas higher-income ones tend towards *dinner* out or *both lunch and dinner*.

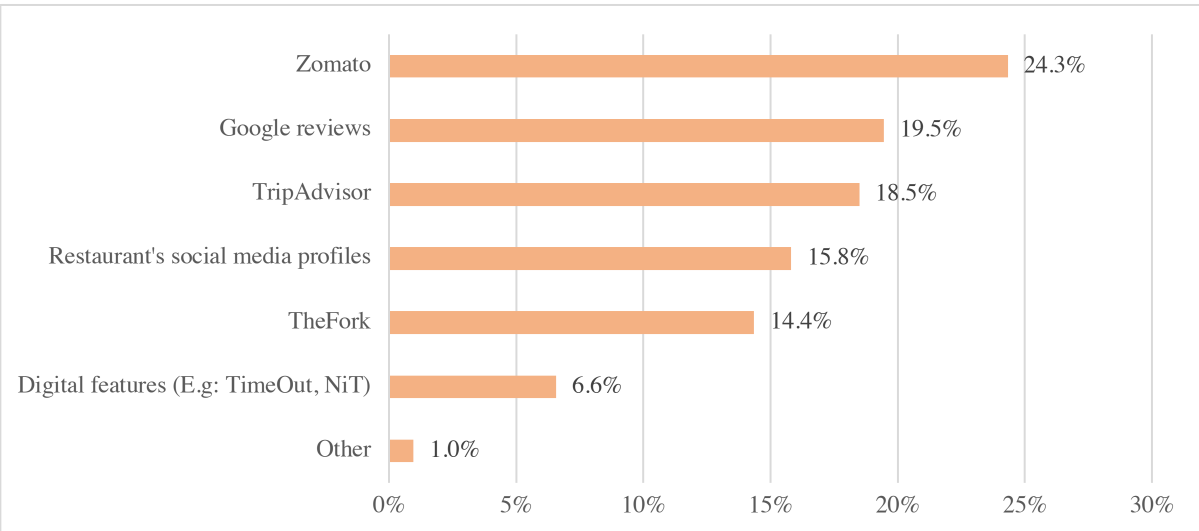
Question 12: What helps you choose the restaurant? Please rank from most likely (1) to least likely (8).

	First		Second		Third		Fourth		Fifth		Sixth		Seventh		Eighth		Total
Friends and family recommendations	67%	220	20%	66	6%	20	5%	16	1%	2	2%	6	0%	0	0%	0	**330**
Food review websites (E.g: Zomato, TripAdvisor)	16%	52	30%	98	21%	70	15%	48	8%	28	6%	20	3%	10	1%	4	**330**
Closeness to your place of residence/work	8%	28	24%	80	23%	76	13%	44	8%	28	11%	36	5%	16	7%	22	**330**

Posts or Instagram stories (the people you follow or Influencers)	3%	10	12%	40	17%	56	16%	52	19%	64	15%	50	10%	32	8%	26	**330**
Restaurants' social media profiles & their Online Ads	1%	2	4%	12	7%	24	19%	64	30%	100	15%	50	18%	58	6%	20	**330**
Search engines (E.g. Google, Bing, Yahoo)	3%	10	5%	16	15%	50	9%	30	13%	42	21%	70	16%	54	18%	58	**330**
Digital features (E.g. TimeOut, NiT)	1%	2	2%	8	8%	28	13%	42	12%	40	16%	52	28%	94	19%	64	**330**
Instagram Profiles (E.g. LisbonFoodies)	2%	6	3%	10	2%	6	10%	34	8%	26	14%	46	20%	66	41%	136	**330**

Considerations: When asked to rank what helps the participants choose the restaurant, the four most ranked aspects across all demographics were *friends and family recommendations*, *food review websites*, *Instagram posts* and *closeness to residence or work*. Older age groups regard *friends and family recommendations* and *closeness to place of residence and work* higher than the younger groups. Younger segments value *posts or Instagram stories of people they follow and influencers* more than older people. While men regard *closeness to place of work or residence* higher than women; women have higher regard *posts or Instagram stories* than men. Higher-income people take *family and friends recommendations* and *closeness to place of work and residence* in higher regard than lower-income participants.

Question 13: From the following, which ones are you more likely to check before visiting a restaurant? Please, choose up to 3 options.

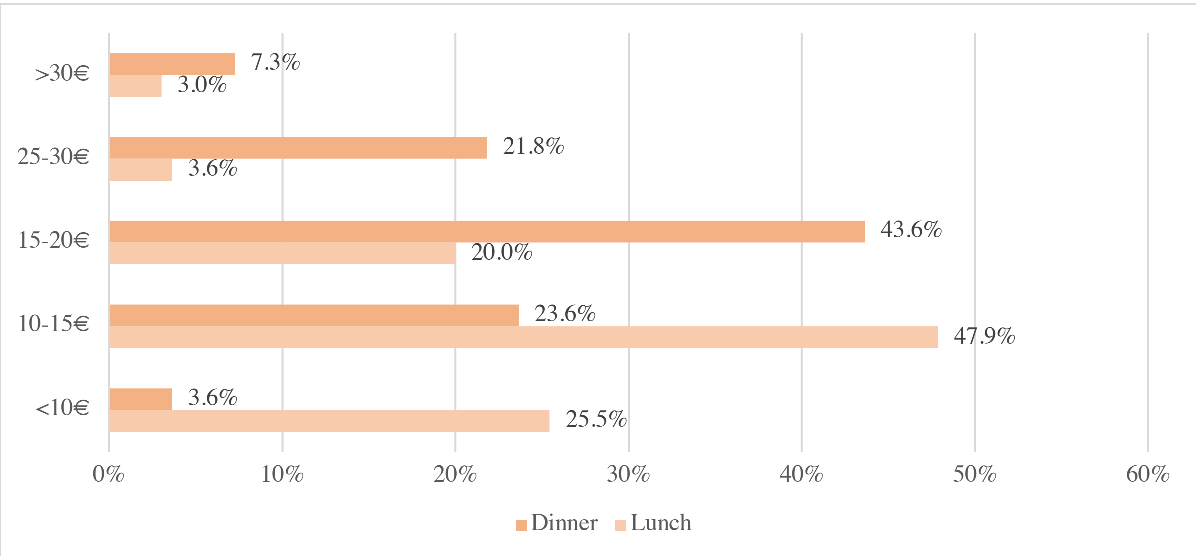


Total Count: 411 responses (More than 1 option was selected by each participant)

		Which ones are you more likely to check before visiting a restaurant?					
		Zomato	TheFork	TripAdvisor	Restaurant's social media profiles	Digital features	Google reviews
Age	18 - 23	47.0%	33.9%	32.9%	36.9%	37.0%	35.0%
	24 - 29	28.0%	32.2%	25.0%	21.5%	25.9%	28.8%
	30 - 35	11.0%	8.5%	10.5%	7.7%	3.7%	8.8%
	36 - 41	3.0%	11.9%	7.9%	9.2%	7.4%	6.3%
	42 - 47	8.0%	6.8%	15.8%	13.8%	11.1%	10.0%
	48 - 53	2.0%	5.1%	6.6%	4.6%	3.7%	6.3%
	54 - 59	0.0%	0.0%	1.3%	6.2%	11.1%	5.0%

Considerations: Before visiting a restaurant, *Zomato* (51%), *Google Reviews* (41%) and *TripAdvisor* (39%) are the most visited platforms. Older demographics are more avid *Google Reviews* and *Trip Advisor* users; whereas the age gap between 18 and 35 regard *Zomato* and *Trip Advisor* as the go-to. Both genders respond similarly to the platforms; except women take into higher account *restaurant's social media profiles* and men prefer *TheFork*.

Question 14: What is your average spending for a meal at a restaurant?



Total Count: 330 responses

Considerations: The average spending per meal for lunch is set between 10 to 15€, and at dinner between 15 to 20€. The 30 to 47 age group tend to spend 25 to 30€ at dinner. Higher-income participants are more willing to pay 15 to 20€ at lunch and 20 to 25€ at dinner.

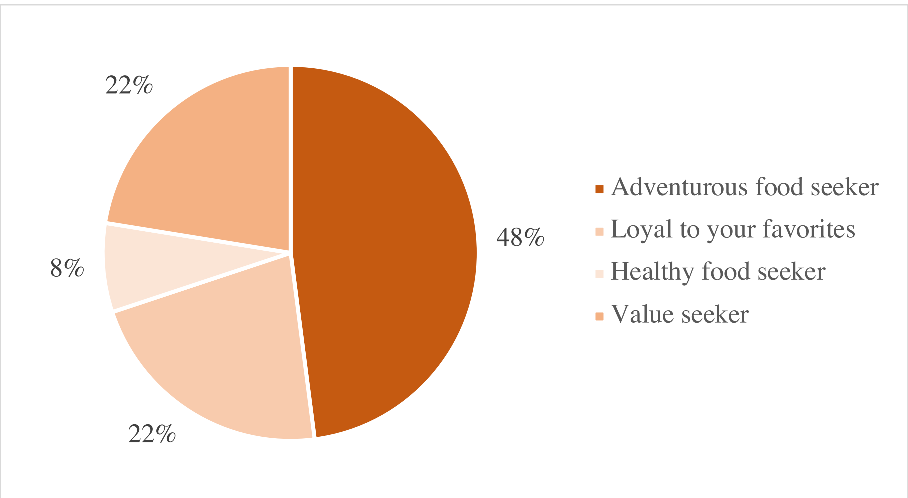
Question 15: When choosing a restaurant, what are the most relevant aspects? Please, choose 3 options.

Metrics	Count	Percentage
Menu (E.g: quality of the food, diversity of options…)	138	27.9%
The atmosphere (E.g: cosy, casual, loud…)	95	19.2%
Customer service (E.g: nice staff, personalized service...)	78	15.8%
Price range	75	15.2%
The space (E.g.: *instagrammable*, modern décor, chic…)	39	7.9%
Client reviews	27	5.5%
Easy to reach (E.g: nearby parking or public transportation)	26	5.3%
Trending	11	2.2%
Waiting time	3	0.6%
Online Presence (E.g: present in social media, regular content...)	2	0.4%
Other	1	0.2%
Total	495*	100.0%

*More than 1 option was selected by each participant

Considerations: Participants give greater value to *menu*, *atmosphere* and *customer service*. The 18 to 23 age bracket take into higher account *menu, price range* and *atmosphere*. The price sensitivity decreases, and the importance of *atmosphere* and the *menu* increases as the demographic ages. *Customer service* expectations increase as income level increases, as well as the regard for *menu quality* and *atmosphere*.

Question 16: Which of the following describes you the most.



Total Count: 392 responses

Considerations: Most participants (more than 40% in all age groups and 48% overall) regarded themselves as *adventurous food seekers*. Some consumers also identified as *loyal to their* *favourites,* but they were mostly older segments (42 to 56). Choices did not vary greatly between gender or income levels. A greater number identified as *adventurous food seekers* as income grew.

Question 17: What types of restaurants are you more likely to visit? Please rank from the highest (1) to the lowest (7).

	First		Second		Third		Fourth		Fifth		Sixth		Seventh	
Traditional Portuguese	34%	134	15%	60	15%	58	11%	42	7%	28	11%	42	7%	28
Vegetarian/ vegan/ plant-based	11%	42	5%	20	11%	42	12%	46	13%	52	26%	102	23%	88
Healthy	5%	18	12%	46	14%	56	17%	66	28%	108	22%	84	4%	14
Burger	3%	12	11%	40	19%	76	26%	100	18%	72	13%	52	10%	40
Italian	22%	86	33%	130	18%	70	14%	54	7%	26	5%	18	2%	8
Ethnic	24%	94	21%	82	18%	70	16%	60	11%	44	7%	28	4%	14
Fine Dining	2%	6	4%	14	5%	20	6%	24	16%	62	17%	66	51%	200

Considerations: When asked what types of restaurants they visited most, *Italian, traditional Portuguese* and *ethnic restaurants* ranked the highest followed by *healthy restaurants*.

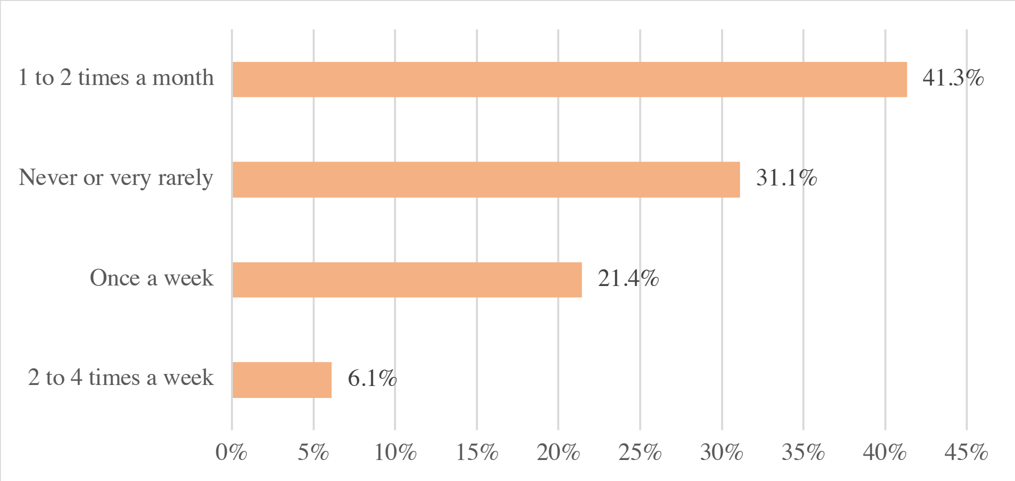
Question 18: Please, choose one of the options for each of the following ethnic cuisines:

	Never tried	Dislike it	It's indifferent	I like it	I love it
European	1.5%	0.0%	7.1%	51.0%	40.3%
Brazilian	17.4%	3.1%	12.2%	37.8%	29.6%
Mexican	12.2%	3.1%	8.2%	39.3%	37.2%
Japanese (E.g: Sushi)	8.2%	9.2%	6.1%	28.6%	48.0%
Chinese	2.6%	8.2%	8.2%	48.0%	33.2%
Asian Fusion (E.g: Wok to Walk, Boa Bao)	7.7%	3.1%	13.8%	44.4%	31.1%
Indian	10.7%	3.1%	4.1%	31.1%	51.0%
Middle Eastern (E.g: Lebanese, Syrian, Moroccan)	35.7%	3.6%	12.8%	30.6%	17.4%

Total Count: 392 responses

Considerations: When asked how they viewed certain types of cuisine, only 11% stated they *never tried Indian food*, 7% said they *disliked it, or it is indifferent* and 82% either *liked or loved it*. The majority of participants had tried different types of ethnic cuisine and had liked or loved it with a very limited number disliking it. It is important to mention that results may be skewed since 27% of the participants have Indian roots.

Question 19: How frequently do you order food or get takeaway?

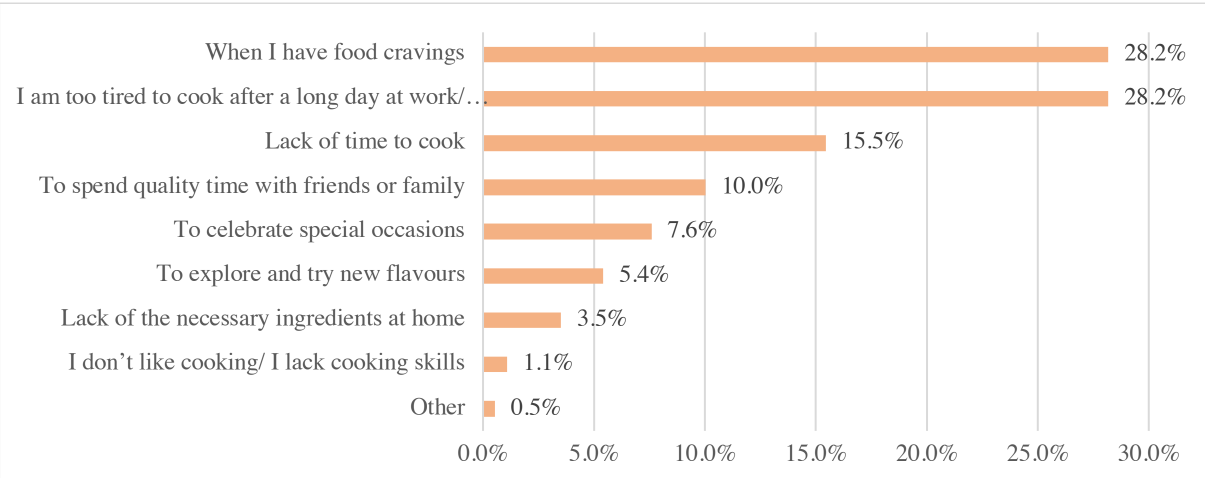


Total Count: 392 responses

Considerations: Ordering food is not as common as initially thought, with *never or very rarely* (30%) and *1 to 2 times a month* (40%) being the options most chosen regarding ordering habits. Younger segments (24 to 35 years old) order more regularly than older ones. Participants identified the main motivators to order food as *food cravings* and *when they are too tired to cook*. Hence, it comes as no surprise that the most common time they order food, both during weekdays and weekends, is *dinner time*.

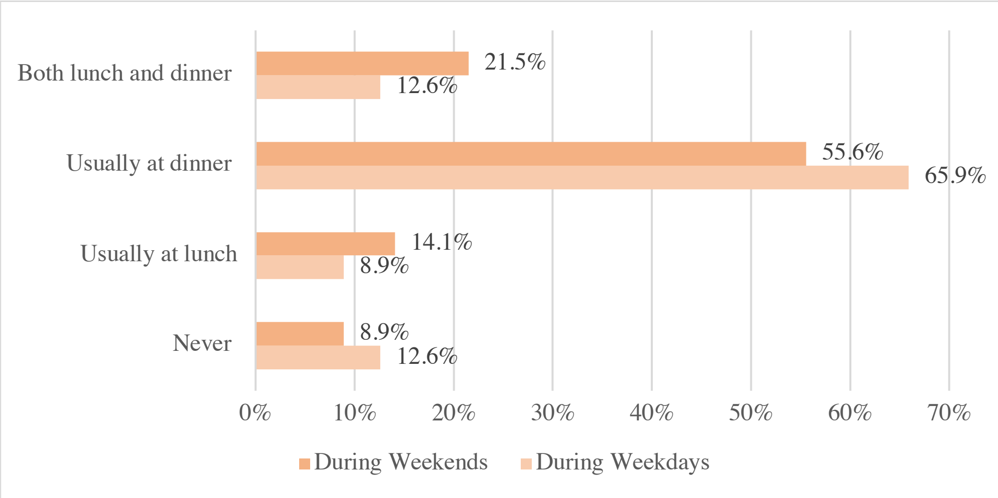
If answer was "Never or very rarely": move to Question 24.

Question 20: Why do you usually decide to order food or get takeaway? Please, choose up to 3 options.



Total Count: 738 responses (More than 1 option was selected by each participant)

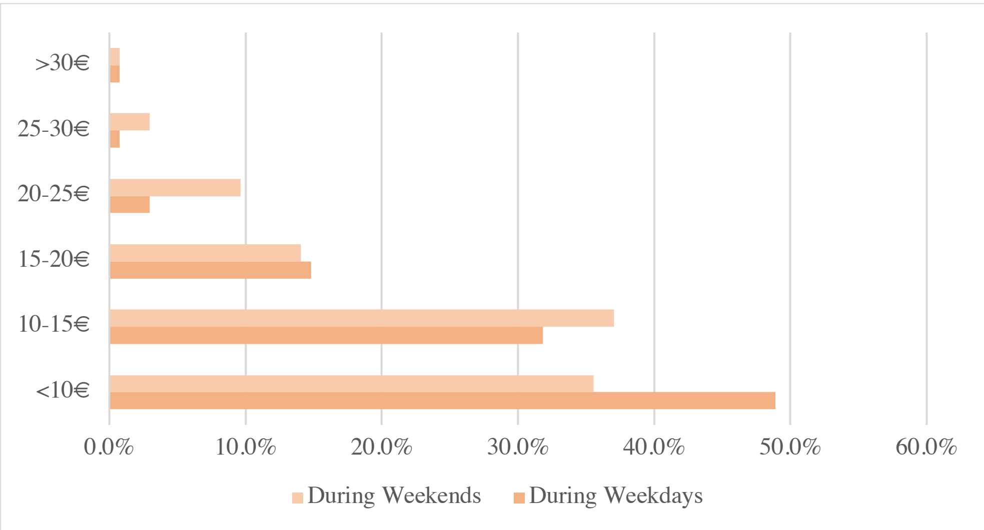
Question 21: When are you more likely to order food?



Total Count: 270 responses

Considerations: Similarly, to dining out habits, the most common participants choose to order food, both during weekdays and weekends, is dinner time.

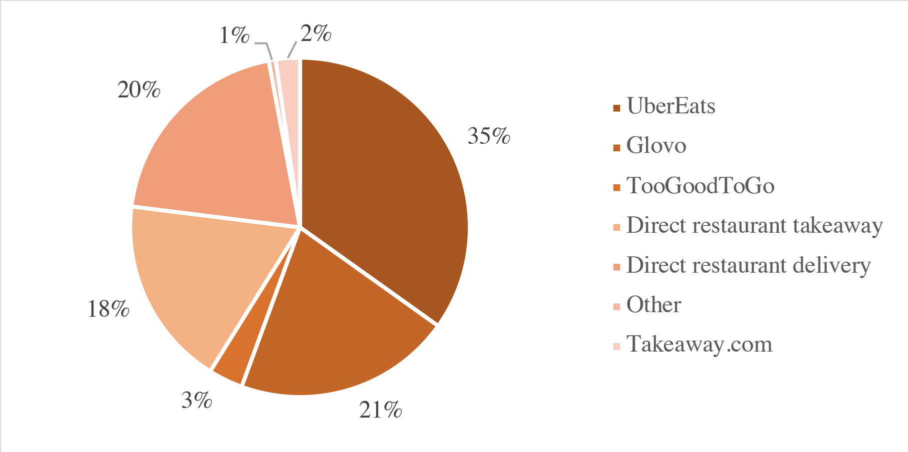
Question 22: What is your average spending per order (per person)?



Total Count: 270 responses

Considerations: During weekdays the average spending per order is less than 10€, whereas during weekends lies between 10 to 15€. Regardless, 50% of the participants either spend less than 10 or between 10 to 15€ in any food order. Individuals with higher income do not seem to be spending more money on their orders; this outcome is expected since higher income is usually directly correlated to age, and older people do not usually order food.

Question 23: Which delivery app/ method do you prefer when ordering food? Please, choose up to 3 options.



Total Count: 608 responses

Considerations: UberEats is by far the most used delivery app/ method (35%) followed by Glovo (21%), direct restaurant takeaway (18%) and direct restaurant delivery (20%).

Question 24: Do you have Indian roots?

Metric	Count	Percentage
Yes	106	27.0%
No	286	73.0%
Total	392	100%

Considerations: 27% of the participants have Indian roots which may skew the results.

Question 25: Do you appreciate Indian food?

Metric	Count	Percentage
Yes	326	83.2%
I don't know, I have never tried	48	12.3%
No	18	4.6%
Total	392	100%

If answer was "Yes": move to Question 26. If answer was "No": move to Question 27.

If answer was "I don't know, I have never tried": move to Question 31.

Question 26: Have you ever been to Indian restaurants in Portugal?

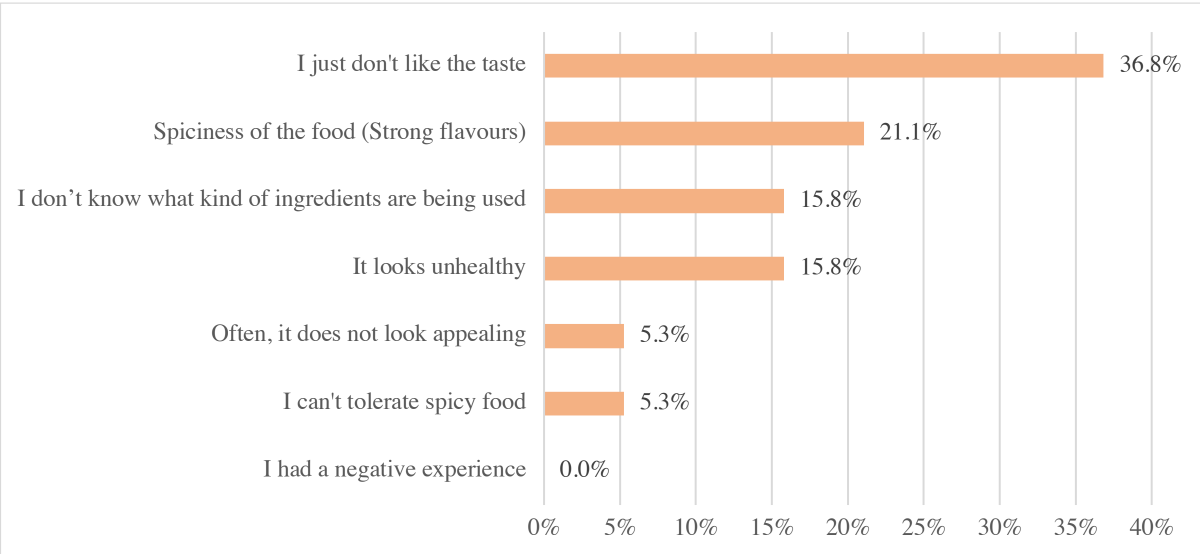
Metrics	Count	Percentage
Yes	254	81.94%
No	56	18.06%
Total	310	100%

In Lisbon, by number of mentions: Ghandi Palace (44), Kaprixu (34), Natraj tandoori (28), Cantina Indiana (28), Passage to india (26) and Ganesha palace (24), Everest Montanha (18), Chutnify (18), Zaafran (16), Cashemira (14), Casa Nepalesa (12), Masala Kraft (12), Real indiana (10), Shree Ram (10), Calcuta (10), Tentacoes de goa (8), Tentacoes de goa (8), Taste of india (6), Dehli Darbar (6), Costa do Malabar (6), Jesus é goes (4), Swaagat (4), Sabores de goa (4), Kerala (4), Haweli (4), Farah's tandoori (4), Aashiana (2), Annapurna (2), Bangal Tandoori (2), Bollywood lounge (2), Cantinho de goa (2), Cinammon (2), Himalaya (2), India gate (2), Indigo (2), Kathmandu (2), Namaste (2).

In Porto, by number of mentions: Real Indiana (8), PortuGandhi (6), Thali (4), Indigo (2), Mendi (2).

Considerations: It is important to emphasize that even though some participants mentioned they really enjoyed the experience most could not recall specific restaurant names (13).

Question 27: Why don't you appreciate Indian food? Please, choose up to 3 options.

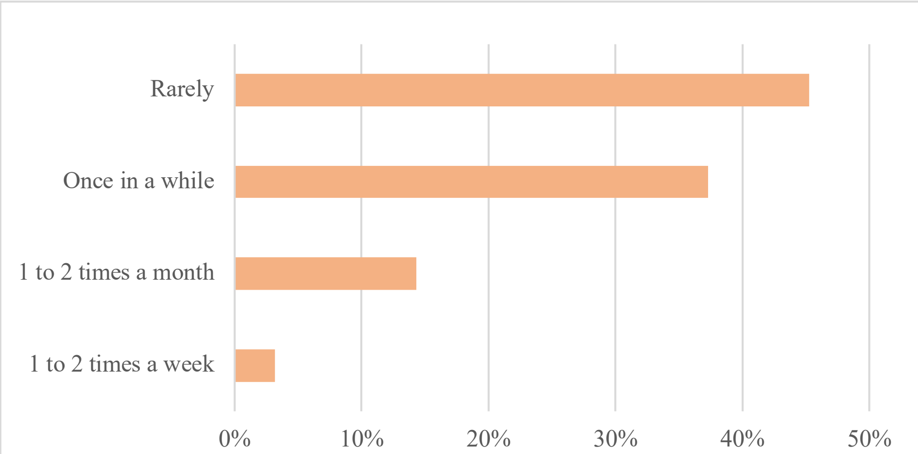


Total Count: 38 responses

Considerations: Out of the 7% of people that stated that they do not appreciate Indian food, the main reasons identified were: do not like the taste and the strongness of flavours (spiciness).

If the answer to Do you appreciate Indian food? was "Yes":

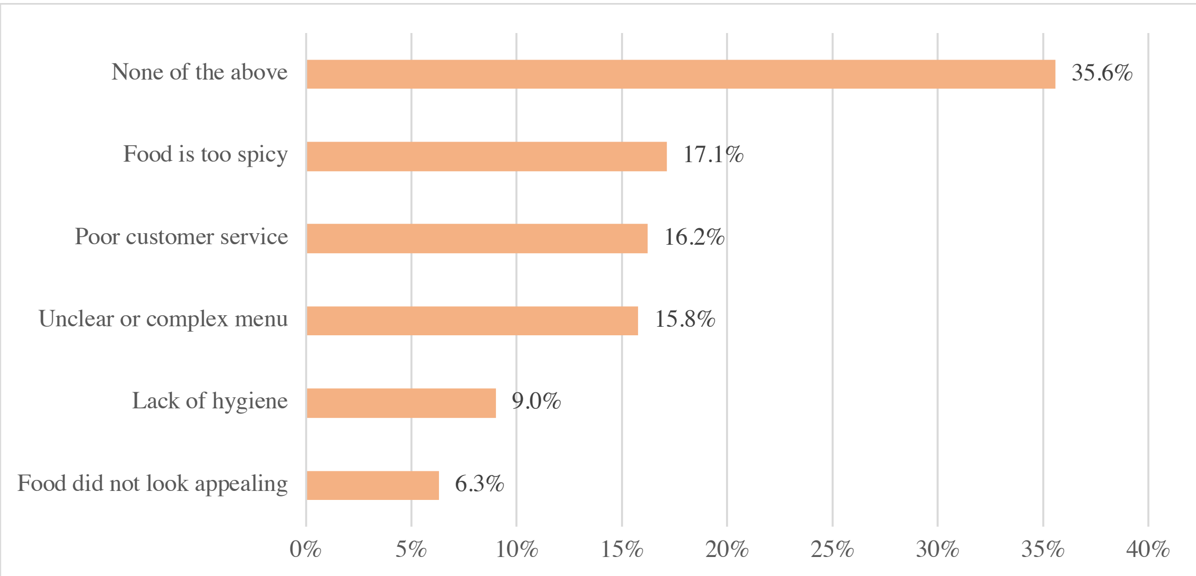
Question 28: How frequently do you go Indian restaurants?



Total Count: 252 responses

Considerations: From the 82% that *either liked or love* Indian food, most revealed (80%) they visit said restaurants *rarely or once in a while*.

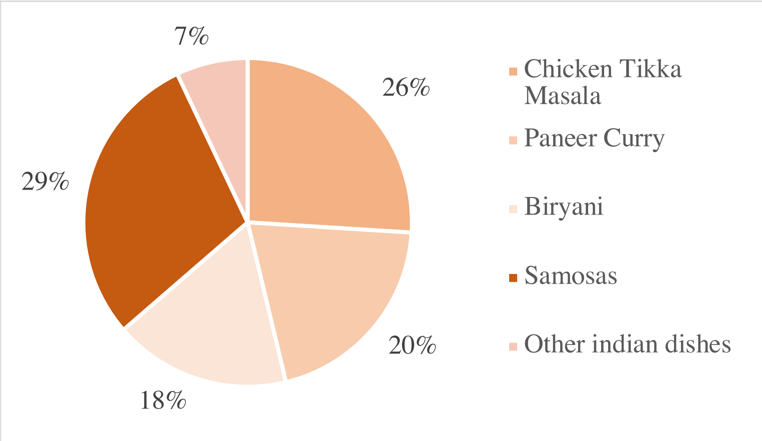
Question 29: Have you experienced any of the following at an Indian restaurant?



Total Count: 444 responses (More than 1 option was selected by each participant)

Considerations: Most also agreed that they hadn't had a negative experience at an Indian restaurant. But those who did, identified food being too spicy, poor customer service, and unclear, elaborate menu as the main reasons.

Question 30: Which of the following Indian dishes you know or have tried?



Total Count: 908 responses (More than 1 option was selected by each participant)

If the answer to Do you appreciate Indian food? was "I don't know I have never tried":

Question 31: Would like to have the opportunity to try some day?

Metrics	Count	Percentage
Definitely yes, because/ but...	42	87.5%
Definitely not, because/ but...	6	12.5%
Total	48	100%

Considerations: From the 12% that haven't yet tried, most said (88%) that they would like to have the chance to do so. They showed curiosity and interest in experiencing new foods and cultures or simply to have new cuisine experiences. Some referred spiciness of the food as the main deterrent from having tried the food.

If the answer to Have you ever been to Indian restaurants in Portugal? was "Yes":

Question 32: What is your general perception of Indian food in Portugal and/or compared to your home country (if applicable)?

Grouped Answers: In general, good food, nicely spiced, different, good price/quality ratio. There is lack of advertising, bad customer service and lack of knowledge on where to go. Lack of presence of Indian restaurants. Some have bad space, but food is good. Lack of quality. There's lack of Indian fine dining in Portugal. Never know what to order. Lack of authenticity and understanding of Indian cuisine: westernized adaptation. Lack of diverse dishes. Lack of concept: "a restaurant should not just be made of a menu". Some have not tried the food in Portugal because the places don't look appealing.

Appendix 8: Interview results and analysis

Evaluation of the business structure and operations

- All the business ideas, except for Masala kraft, arose in a period where the restaurant industry was growing at a very high pace, and the main objective was to introduce the Indian gastronomy to the Portuguese restaurant culture.
- All four interviewees had previous experience in the restaurant industry and/ or relatives that also worked in the industry. Relatives expertise was extremely beneficial as they provided them with vital insights into the Indian restaurant industry and logistical experience. Three of them also had strong connections with Indian cuisine chefs from the UK – one of the most developed and specialized countries in terms of Indian cuisine (E1, 2 & 3).
- All interviewees are Portuguese with Indian roots, which, in their opinion, was a crucial factor in order to provide quality Indian food. When hiring, greater preference is given to people from a Portuguese Indian background, preferably of their knowledge beforehand, or to south Asian people (Bangladeshi, Indian). At times this preference hinders their service due to their inability to communicate appropriately with the customers' given the lack of Portuguese language skills.
- The ownership structure of each restaurant was also similar amongst the three companies, as they mainly consisted of close family members. The lack of non-Indian members in either management or ownership has led to a skewed opinion and lack of full understanding of what Portuguese customers want.
- None of three businesses import directly from India nor offers Indian beverages except for spices. The leading Indian-specific goods suppliers consist of Indian shops located in Martim Moniz, Anjos and surroundings. The rest of the ingredients are supplied by local Portuguese companies.
- The primary source of revenue is sit-down meals. However, due to Covid-19 pandemic, most incorporated the online food delivery services, such as UberEats, Glovo or Takeaway.com, in their strategy. Regardless, the focus is mainly on sit-down meals revenues as the online food delivery companies charge high commissions on orders (approximately 30%).

Characterisation of consumer potential

- Regular customer profiles vary according to the location of the restaurants.
- Overall, 99% of customers are Portuguese residents, full-time workers and with middle to high-income level. However, in highly touristic areas such as Bairro Alto, the customer base also includes tourists.
- The standard customer profile of restaurants located in residential areas is mainly residents or people working in the neighbourhood.
- Young customers are a growing target segment.
- Customers usually order similar dishes and drinks in every Indian restaurant: naan, chicken tikka masala, prawn curry, mango lassi and samosas.
- They all considered that spiciness of the food is the most common concern amongst Portuguese people.

Techniques used to retain and attract new customers

- All regarded WOM marketing as their most important tool. Hence, maintain strong relationships with customers and creating good customer experiences is critical to fuel it.
- According to Calcutá's owner, having a website and online was essential to attract new B2B (catering services) and B2C customers.
- Influencer Marketing Strategy, applied by Masala Kraft, was a successful strategy to attract younger customer segments.
- Having a pre-defined lunch menu at a fixed price allowed them to attract more customers and reduce waste at lunchtimes, that are usually less busy than dinner.

Critical success factors to reach differentiation and competitivity

- Both Calcutá and Kaprixu managers understand the role that wine plays in the Portuguese culture. Hence, they focused on learning how to pair the wine with the specific flavours of Indian food and offer a wide variety of wines to satisfy different tastes.
- All shared the opinion that the manager's constant presence at the restaurant, strong customer relationship and quality of food were the most crucial factors in achieving long term success. The last two are also the most appreciated aspects by the customers in all three restaurants.
- All restaurants identify as critical factors a good chef that is capable of building a strong relationship with the rest of the team.

The role of authenticity in ethnic restaurants

- As a means to strongly adapt the Indian food to the Portuguese culture, most of the restaurants have similar menus (offering mainly North-Indian food, Punjabi food, or Goanese Food). Hence, the lack of differentiation in their menu offerings, even though they state differently. All focus on trying to offer Indian food to Portuguese; thus, they create their menu based on what the Portuguese are looking for (E1&E2).

India Restaurant Specificities

- The busiest days are Friday nights, Saturday lunch and dinner and Sunday lunchtime.
- All name November and December as the busiest months of the year due to Christmas. The fact that Indian food mainly consists of very hot/warm dishes leads to greater demand in the coldest months of the year, namely January, February and March.
- Grocery Inventory/stock should be supplied/ordered at least two times a week to keep the freshness of ingredients.
- Indian cuisine is more complex than the traditional Portuguese cuisine. Hence, requiring more preparation and specialized personnel.
- In Indian restaurants, it is vital to divide tasks in order to increase the efficiency of the service and to have at least two chefs (curry and tandoori) and one assistant to prepare naan.
- Instead of defining of what profit margins that wanted to have in each meal, all restaurants established a pricing strategy based on competition analysis.

Appendix 9: *Mood boards of the branding, space, atmosphere, food and tableware*


Decor &
Atmosphere
Open Kitchen
Marble Tables


Tableware
&
Utensils

Appendix 10: Menu Sample

It is simply to showcase the type of dishes and drinks to be served and the design of the menu.

ODE ÀS NAUS

AUTHENTIC INDIAN RESTAURANT

In every community, eating is a means to celebrate and to bring people together. We are particularly good at this in India. Every celebration has food in the middle of it, invariably leaving us all thoroughly sated, happy and burping (considered a courteous gesture).

SMALL PLATES

CHICKEN LOLLIPOP / 6.5 (S)
Spiced batter coated chicken wings deep fried till crisp golden.

PRAWN KOLIWADA / 7.5 (G)
A bowl of delicate, crispy morsels – perfect for chutney-dipping.

BHEL PURI / 5 (VG)
Puffed rice, peanuts, Bombay Mix and nylon sev tossed with fresh pomegranate, tomato, onion, lime, tamarind & mint.

KURKURI BHINDI /5 (VG)(G)
Fine crispy lady's fingers for fingers.

BOMBAY SANDWICH / 7 (V)
Potato and turmeric mash, "smoked cheese", tomato, cucumber and beetroot sandwich.

ALOO ONION PAKODA / 6 (VG)
Slided potato dipped in gram-flour batter and deep fried. Warm and crisp – the most perfect antidote to grey skies there is.

DELI GOL GAPPA / 6 (VG)
A graceful combination of hollow puri stuffed with mashed vegetables and filled with a mixture of flavoured water.

MASALA BHUTTA / 6 (VG)
Corn-on-the-cob, grilled over a charcoal fire, then finished with butter, chilli, salt and lime, Chowpatty beach style.

MAINS

LAMB ROGAN ROSH / 14 (S)
The heavenly blend of spices in a rich aromatic curry combined with meltingly tender lamb pieces.

SHRIMP KORMA / 14 (M)
Prawns meet coconut, garlic, chilli and ginger in a delightful rich flavoured sauce.

CHICKEN TANDOORI SALAD / 12 (S)
Fresh salad mix served with specially seasoned chicken grilled in the tandoor oven.

SHAHI PANEER / 11 (V)
A right royal affair. Butter-soft paneer involved in delicious creamy cashew gravy.

CHANA MASALA / 12 (V)(G)
Hearty, saucy chickpea and tomato curry dish with warming spices is an abidding favourite of Indian families everywhere.

PHAANU / 11 (VG)(G)
Lip-smaking delicious soupy dish with a blend of various lentils from Uttarakhand.

TADKA DAAL / 12(VG)
Creamy lentils seasoned with spices and ghee and prepared over a charcoal fire, to acquire a special smoky flavour.

PAU BHAJI / 10 (V)
A bowl of mashed vegetables with hot, buttered, home-made bun, Chowpatty Beach style. No food is more Bombay.

ODE ÀS NAUS

AUTHENTIC INDIAN RESTAURANT

DRINKS

NON ALCOHOLIC

MANGO LASSI / 3
First-class yoghurt with fresh mango pulp and fennel seeds.

NIMBO PAANI / 3
Light lemon drink to quench the thirst. Made to order with fresh juice, salt, sugar and soda.

BHAANG LASSI / 3
Traditional Holi drink, but with fresh shredded mint.

SUGAR CANE JUICE / 4
Raw liquid extracted from pressed sugarcane served with a dash of lime and ginger jouice.

WATER / 2.5
Pure water that bubbles naturally to the surface from artesian springs in Caramulo.

ALCOHOLIC

KINGFISHER /4
Beer came to India in the 18th century. This mild and malty easy drink lager is India's choicest favourite.

COCONUT/CASHEW FENI / 4
Goan Feni, the award-winning country liquor, is a Portuguese recipe developed during their colonial times in India.

LIBERTY PUNCH / 15
A magnificent sharing concoction of jaggery, lime, green tea and Ceylon Arrack.

CABRIZ RED WINE **/ 16/4**
There is no mistaking the full-bodied, rich and powerful character. And yet there is velvet.

CARM WHITE WINE **/ 16/4**
The coolness of the Douro is sure to marry well with your spicy food.

PEGOS CLAROS ROSÉ **/ 14/3.5**
Cool altitudes and herbal fields are at play in this unendingly drinkable delight.

FEEZY BEVERAGES

THUMBS UP / 3
The cola of Bombay, in botals nicely worn from recycling.

LIMCA / 3
Fizzy Bombay lemon drink. "Contains no fruit" —guaranteed.

COCKTAILS

OLD FASHIONED / 8
Smoked demerara, orange bitters, cayenne and orange peel. Fire in the throat, warmth in the belly.

EAST INDIA GIMLET / 8
The old-established drink devised for sailors to evade scurvy. Dry gin with Rose's lime and a touch of celery bitters.

WHISKY MAC / 8
A combination of blended scotch and ginger-flavoured currant wine invented during British Raj in India.

TEAS & COFFEE

MASALA CHAI / 2.5
This powerful concoction of milk, sugar, tea and spices is what keeps India running.

GUR GUR CHAI / 2.5
Pinkish salted tea made with brew tea leafs, banking soda and yak milk and butter.

DARJEELING CHAI / 1.5
Sophisticated chai latte recipe made with fresh ginger root and crisp Darjeeling black tea.

ASSAM CHAI / 1.5
Assam is the most well-liked tea-leaf in India. Malty, brisk and bright.

MONSOON KATWAI COFFEE / 2
A rich, aromatic coffee with soft acidity and pleasant spicy notes brought from the state of Karnataka.

ODE ÀS NAUS

Authentic Indian Restaurant

SIDE DISHES

JEERA BASMATI RICE / 2.5
Steamed rice gently spiced with cumin.

SAFFRON RICE / 3
Saffron'd steamed rice that perfectly goes along with creamy curry dishes.

PLAIN NAAN / 3.5 (VG)
Freshly baked in the tandoor.

SPINACH & CHEESE NAAN / 4
Cheddar cheese and fresh spinach are melted inside.

SWEET CHAPATI / 4
Soft handkerchief-thin bread stuffed with sweet dough.

KUMAONI RAITA / 3.5
Delicate mint yogurt, fresh as the cucumber, to soften the spiceness of the food.

SPICED INDIAN SLAW / 3 (VG)
A kachumber with shredded carrot, peppers, and raisins dressed up with mint and honey.

DESSERTS

MALAI GHEWAR / 4.5
Round shaped rich and exotic Rajasthani dessert made with refined wheat flour and soaked in ghee syrup.

KULFI / 5.5
Pieces of ice cream of creamy, proper pistachio and satin-smooth, sweet mango.

SHRIKHAND & AAM / 5.5
Sweet hung curd flavoured with cardamom and saffron and sprinkled with pistachios.

SIZZLING BROWNIE / 6
Mouth-watering chocolate brownie served with a scoop of ice cream and topped with a generous pouring of hot melted chocolate.

ADDITIONAL INFORMATION

Food will be served to your table as it is prepared.

(S) Spicy

(M) Mild

(V) Vegetarian

(VG) Vegan

(G) Gluten-Free

We make every effort to avoid cross-contamination but sadly can’t guarantee dishes and drinks are allergen-free. If you have any food allergies or dietary requirements please let us know. Vegan, gluten and dairy-allergy menus are available.

THANK YOU FOR VISITING US!

If you would like to know more about us and our story, you may visit our website and social media accounts by scanning the following QR Code:

Appendix 11: Sustainable practices and initiatives

Straws	Instead of standard straws, use *edible ginger straws*. They are more expensive but offer a differentiated customer experience and pair greatly with all the Indian drinks offered.
Takeaway packaging	There are several options available in the market that allow for the food to be transported in *recycled plastic-free containers* without losing its quality.
Semi-Open kitchen	To promote *transparency*.
Suppliers	Use of *fair-trade suppliers*, and whenever possible *local suppliers*. To promote better practices and local businesses and greater quality of ingredients.
Labelling and storage system	*Strictly manage stock* and expiration dates. It can be done using digitalized systems.
Waste	Special recycling and compost station at the kitchen in order to properly *separate leftovers and recycle*.
	Use *biodegradable bin bags* for unavoidable waste.
	Sell and donate leftover food by partnering with *re-food apps* like *Toogoodtogo*. One can reduce food waste whilst recovering some of the cost.
Water	Filtered water in *refillable glass bottles* reduces water consumption and reduces plastic waste.
Cleaning products	The use of *chemical-free cleaning* products.
Staff	*Train and educate staff* in all the sustainable practices to be employed and encourage them to suggest possible improvements.
Receipts	Give the customer the option to receive a *digital receipt*. If they still prefer paper, use seed sustainable paper.
Napkins	Replace paper napkins with *linen* ones. It is not only more sustainable, but it also gives a more refined appearance.
Eco-friendly equipment	It is environmentally friendly, and it is more *energy and water efficient*.
Menu	Approximately 50% of the menu is either *vegan or vegetarian*.