



AZUL<sup>★</sup>

Research **Advisory** and Support Services



## Research Possibilities in Restaurants...

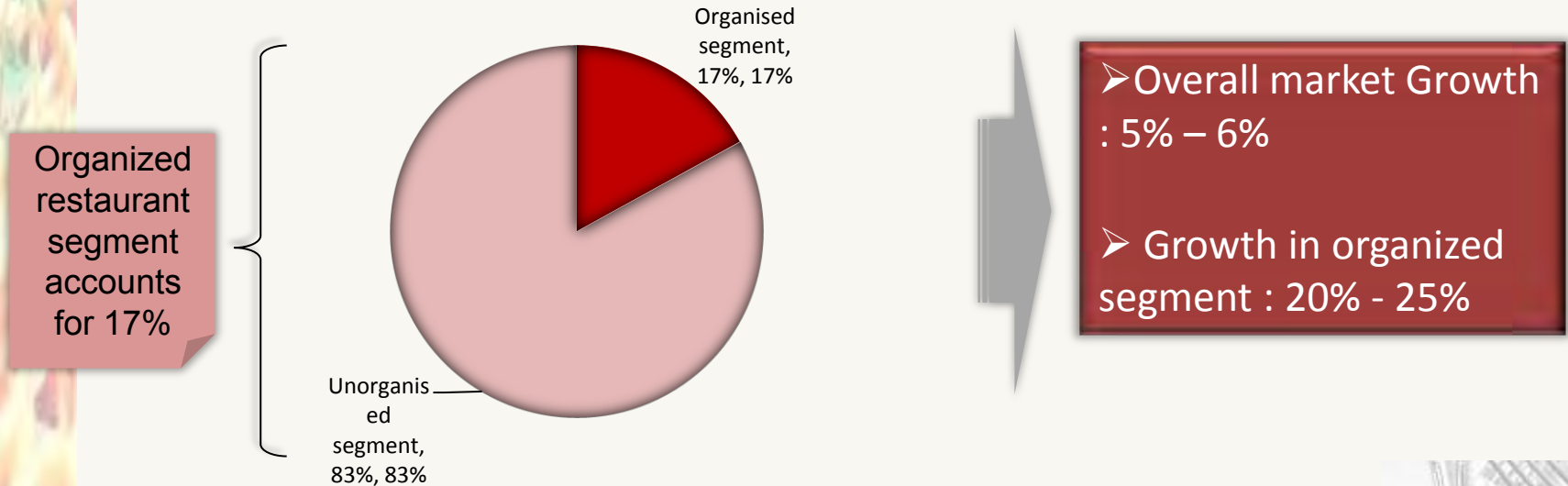
*Eating out is one of the most enjoyable entertainment activities for 50 per cent of Urban Indians*



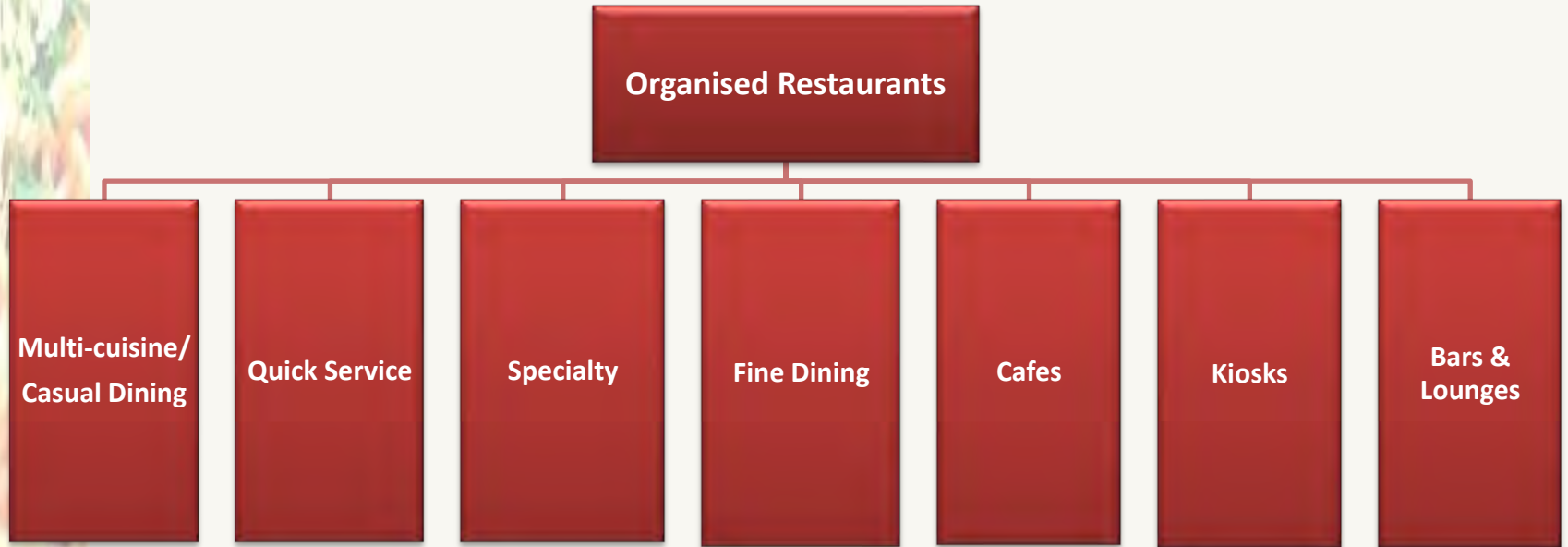
# Restaurant Market in India : Size and Growth



- The restaurant market in India is valued at **US \$ 10 billion**
  - The organized segment is valued at US \$ 1.7 to US \$ 1.8 billion



# Organized Restaurants in India : Classification



# Growth Drivers for the Restaurant Industry



The number of people employed by the restaurant industry is 5 times that employed by the IT industry and 10 times that employed by the Hotel sector

## Socio-Economic

- Growing income levels
- Increased levels of urbanization
- Changing preferences and lifestyles
- Increased proportion of working women
- A higher proportion of Indians visiting abroad and picking up exotic tastes
- Impact on society (Provides direct employment to 5 million people)

## Regulatory

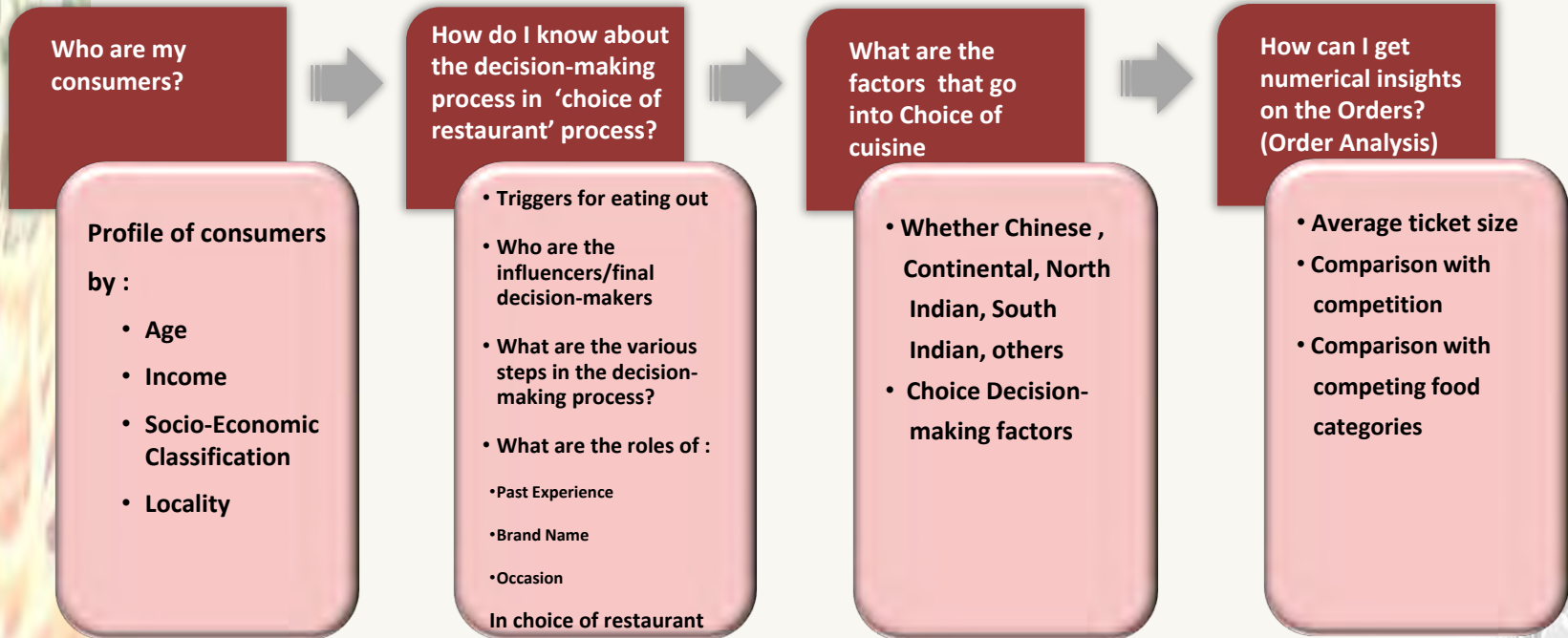
- Single window licensing (a number of other initiatives on the regulatory front are needed)



# Business Questions...



*Azul helps Restaurateurs answer questions like...*



*...And more*



# ..Addressed by Research Solutions...



## Using Research Instruments



...And more



→ **RESTAURANT PANEL**



→ **DEPTH INTERVIEWS**



→ **STRUCTURED INTERVIEWS:**  
A) F2F  
B) ONLINE  
C) TELEPHONIC



# An Illustration : Restaurant Health Check

*...through mystery audits*



- To assess the performance of individual restaurants (and benchmark) on parameters like:
  - Infrastructure & Upkeep
  - Service levels
  - Taste
  - Hygiene
  - Overall Experience
- Standard Azul audit form and reporting format
  - A total of 75 parameters on which a restaurant could be assessed
- Performance can be assessed and compared across:
  - Weekday and Weekend
  - Day and Evening

**Typical Output Of An Audit...**

| Attributes *              | Weekday | Weekend | Overall |
|---------------------------|---------|---------|---------|
| Infrastructure and Upkeep | 9.1     | 8.8     | 9.1     |
| Service Levels            | 6.1     | 2.6     | 4.6     |
| Taste                     | 8.8     | 8.8     | 8.8     |
| Hygiene                   | 8.0     | 6.0     | 7.0     |
| Overall Experience        | 8.9     | 7       | 8       |

\* Restaurant performance indexed on a score of '10'

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