



MANGAL ANALYTICS AND  
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# MARC Insights Rise of Experiential Dining

## October 2025



# Table of Contents

1

Industry Overview

*Pg. 03 – 06*

2

Experiential Dining Segment

*Pg. 07 - 13*

3

Experiential Dining in Goa

*Pg. 14 - 20*

4

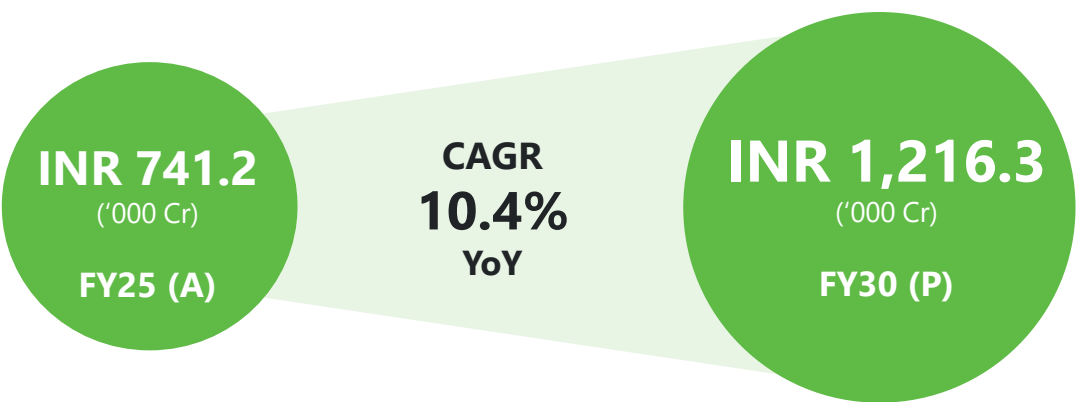
Our Expertise

*Pg. 21 - 26*

# Industry Overview

# Food Service Industry

## Market Size

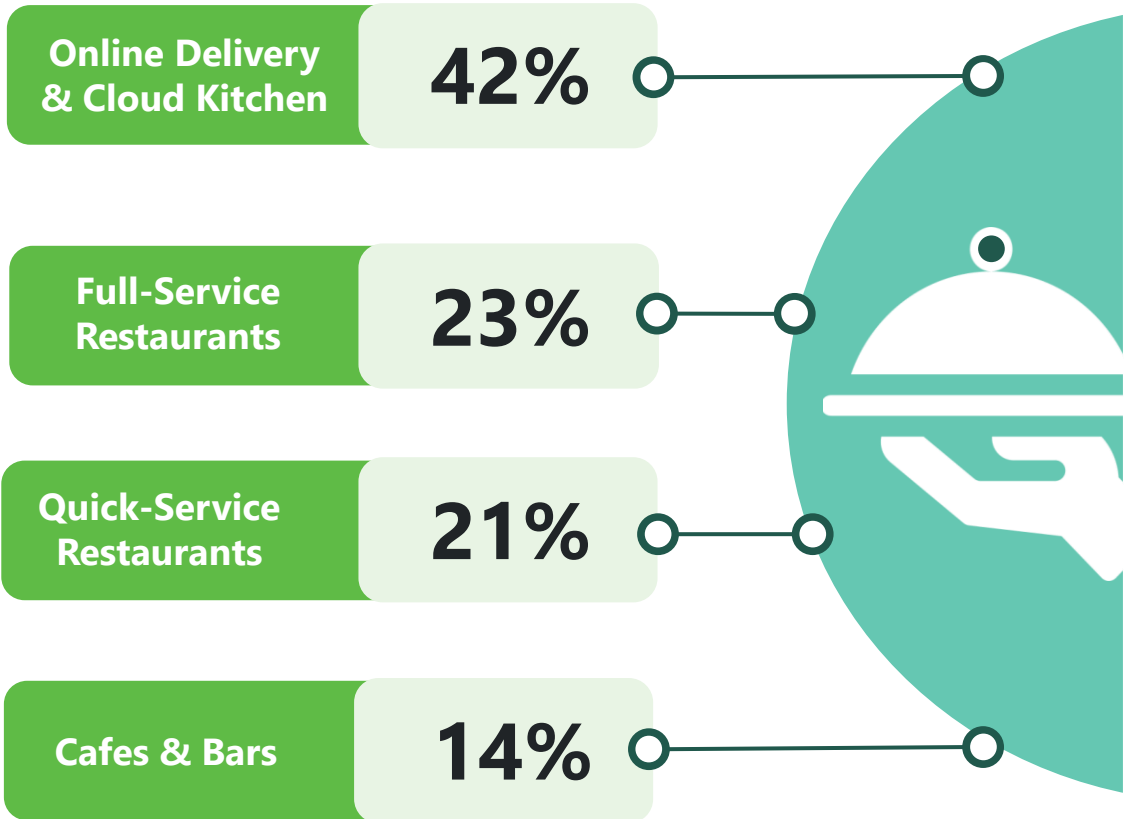


As per National Restaurant Association of India, India's food services market will surpass **Japan** by **FY28** to become the **world's third-largest**, after US and China.

In FY25, the food service sector contributed **2% to the country's GDP**.

## Food Service Industry Segments

*\* Contribution to Overall Foodservice Industry as per FY25 Market size*



Source: [Restroworks](#), [Tech Sci Research](#), [Economic Times](#), [Grand View Research](#)

# Restaurant Industry

## Growth Drivers



### Urbanization

Rising rural – urban migration , nuclear families, are boosting dining out and restaurant visits. with the top 50 cities, currently accounting for ~70% of food service demand.



### Digital Transformation

Adoption of delivery platforms and QR menus is enabling restaurants to serve more customers efficiently, fueling revenue growth and market expansion.



### Changing Consumer Preferences

As per Restaurant India, rising demand for hygiene, quality, and unique dining experiences is diversifying preferences, with 73% willing to pay more for sustainable food.



### Expanding Markets & Demographics

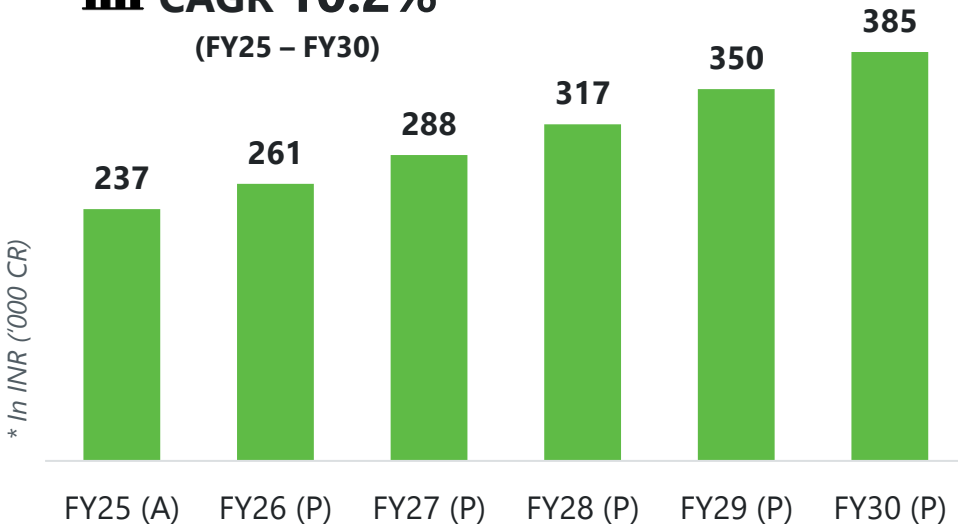
Tier-2 and Tier-3 cities account for over 48% of food delivery orders, showing that growth in eating out and delivery is increasingly driven by smaller cities and not just metros.

## Market Size of Restaurant Industry



**CAGR 10.2%**

(FY25 – FY30)



Urban Indians now dine out around **5 times a month**, and this is expected to increase to **7 to 8 times a month by 2030**.

Source: [Restaurant India](#), [Resto Works](#), [IBEF](#), [Prestair Systems](#), [Restaurant Industry Statistics – Restoworks](#), [Indus food](#), [Nexdigm](#)

# Worldwide Trends Reshaping the Industry

*From conventional hospitality to culinary innovation - The restaurant industry is evolving rapidly, driven by globalization, urbanization, and changing consumer preferences.*

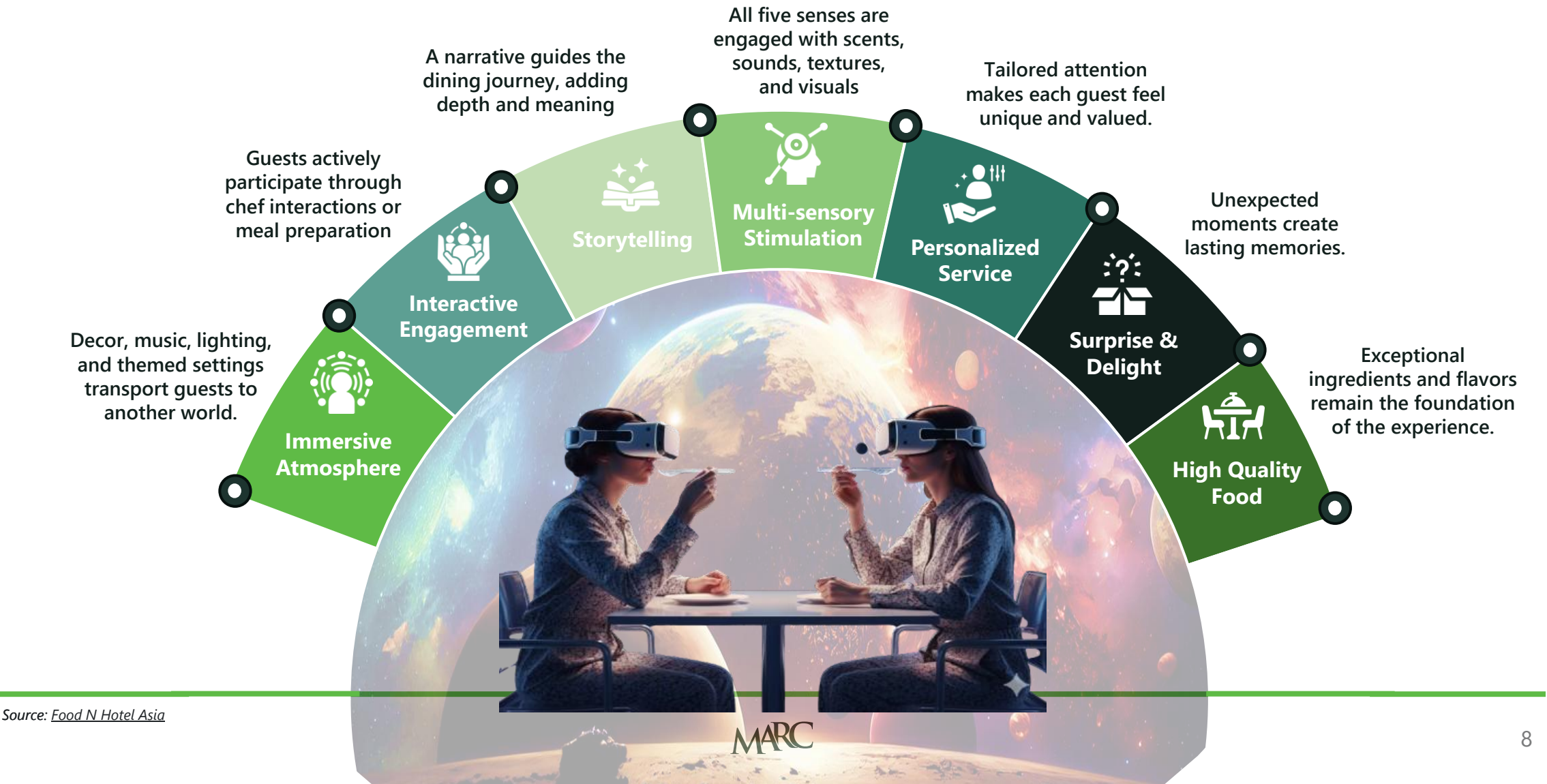


Source: [Kinara Capital](#), [Worldchefs](#), [Restaurant India](#), [CNN Traveller](#), [Its Goa](#)

# Experiential Dining Segment



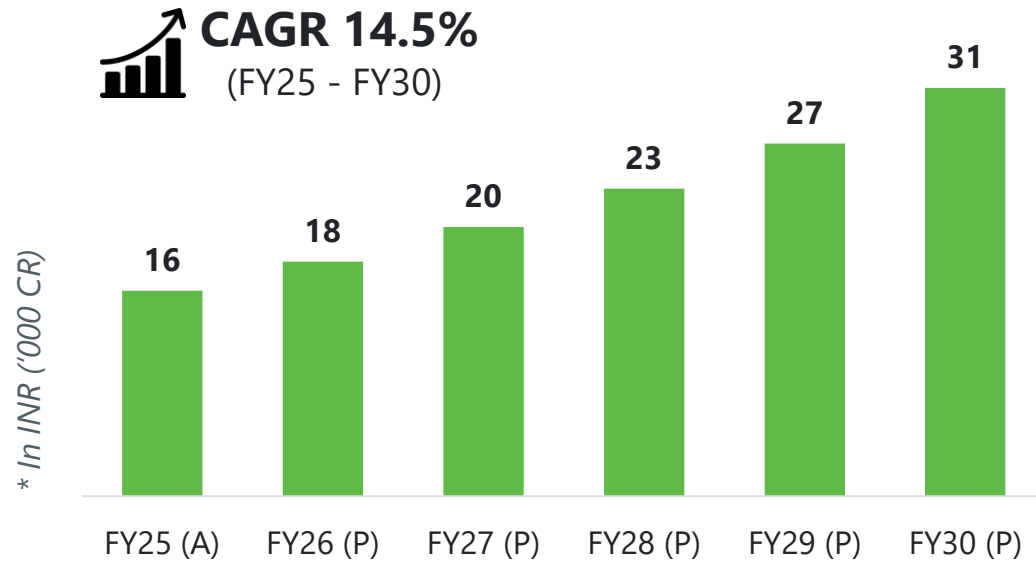
# The Key Elements of Experiential Dining





# Experiential Dining In India

## Market Size



## Key Highlights



Average Spend per Person for Experiential Dining

**INR 2K - 8K**



Major Experiential Dining Themes

Cinematic experience / Nature dining/ Novelty and surprise



Avg. Growth in Experiential Dining Bookings

**~27% YoY**



Major Customers

Urban Millennials & GenZ

**69%**

*of the millennials post food photos on the Social Media*

(Source: Cropink)

**74%**

*of people use social media to decide where to eat*

(Source: Cropink)

**72%**

*Diners increasingly seek experiential dining — chef's tables, themed events, and interactive experiences.*

(Source: Technomic Study)

**50%**

*As per Eventbrite report, respondents are willing to pay more for an immersive dining experience*

(Source: Eventbrite Report)

Source: [Indusfood](#), [ET Hospitality](#), [Restaurant Times](#), [Restaurant India](#), [Tableo](#), [BASE](#), [Cropink Survey](#), [Restaurant Times](#), [Eventbrite Survey](#)

# Dining Reimagined: The Power of Experience in Dining

## Growth Drivers



### Rise of Millennials and GenZ

Younger diners (10–40 years), forming 52% of India's population, drive the demand for novelty—dining out frequently and seeking new social and experiential options.



### Shift in Consumer Preferences

65% of Indian diners prefer restaurants offering unique experiences beyond food presentation. Consumers seek emotional connection, storytelling, and multisensory engagement.



### Willingness to pay more

According to KPMG study 63% of Indians would pay more money for a unique dining experience



### Reviving Traditions with Modern Twist

India's culinary tourism is booming, with experiences like Rajasthani thali feasts and coastal seafood trails reimagined in contemporary, immersive settings that connect diners to local culture.

## Key Trends



### Immersive & Themed Experiences

Restaurants use storytelling, themed décor, and interactive setups to transport diners into new worlds. Pop-ups, festivals, and collaborations add excitement and exclusivity.



### Technology-Driven Personalization

AI, analytics, and AR/VR personalize dining with tailored menus, customized ambience, and immersive multi-sensory experiences like virtual kitchen tours.



### Turning Dining into Sharable Experiences

Platforms like Instagram and TikTok are shaping dining trends—restaurants now design “Instagrammable” spaces and dishes with striking visuals, live chef acts, and AR/VR to attract diners.



### Implementing Immersive Concepts

Standalone hotels are turning dining into immersive experiences to boost revenue. For instance, in 2023, a heritage hotel in Delhi transformed formal fine dining restaurant into a Mughal-themed experiential space with live music and royal cuisine. This raised revenue by 25% within six months.

Source: [WorldChefs](#), [ET Hospitality](#), [Lightspeed Restaurant India](#), [Rolling Stone](#), [cropink](#), [Agriculture.basf](#), [MobiHQ](#), [Isretail](#), [NDTV Food](#), [KPMG](#)

# Experiential Dining Across the Globe

## Where Senses Lead the Way: The World's Most Unique Experiential Dining Concepts

### Where Sight Fades, Flavors Speak...



The core idea:  
"removing sight  
heightens the  
other senses!"



  
**blindekuh**

**Headquarters:** Zurich, Switzerland  
**Year of Establishment:** 1998

Blindekuh Foundation is a Swiss non-profit that created and runs the Blindekuh "dine-in-the-dark" restaurants to provide paid, sustainable work and raise awareness about life without sight.

Its revenues are reinvested to pay fair wages, fund staff training, cover operating costs and support welfare programs for visually impaired members.

**DANS LE NOIR?**  
DES SENS À L'ESSENTIEL

**Headquarters:** Paris, France  
**Year of Establishment:** 2004

Dans Le Noir? Was founded by Edouard de Broglie's. From its first Paris restaurant, the brand has expanded internationally through a franchise model, now operating in 10 countries and 17 cities

Beyond its restaurants, the brand hosts immersive workshops in total darkness like Spa sessions, wine appreciation sessions, and olfactory explorations around perfume.

### A Culinary Hallucination, Perfectly Designed.



 **ULTRAVIOLET**  
BY PAUL PAIRET

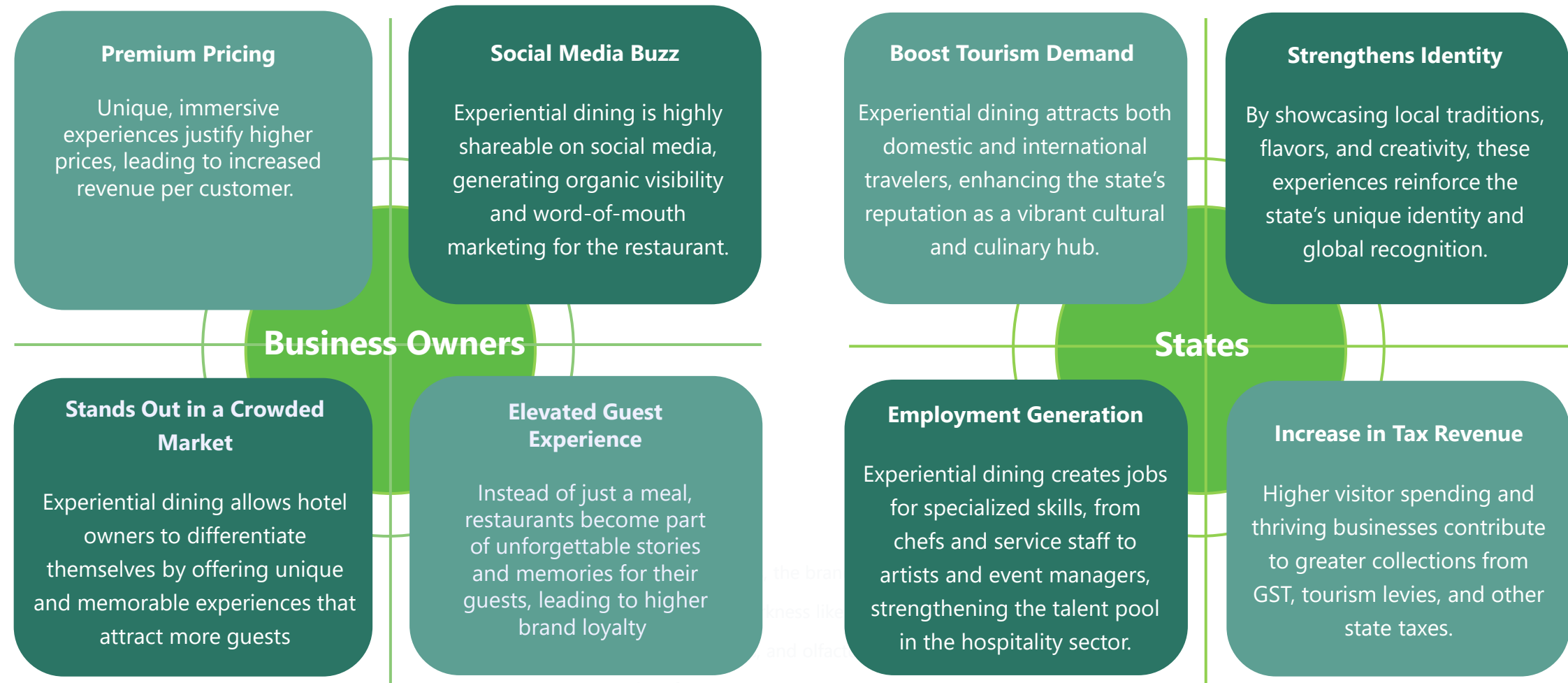
**Headquarters:** Shanghai, China  
**Year of Establishment:** 2012-2025

Ultraviolet, a unique single-table restaurant, fuses avant-garde cuisine with multi-sensory technology to deliver an immersive 20-course experience. Globally acclaimed and holding three Michelin stars, it has set new benchmarks in experiential dining.

After 13 years, it closed on March 29, 2025, due to construction disruptions and economic challenges. Its farewell, "UV's Final Act," was a grand celebration, bringing together 10 final guests and over 100 past and present team members to mark the end of a remarkable chapter.

Source: [blindekuh Zurich | blindekuh.ch](https://blindekuh.ch), [Dans le Noir, des restaurants insolites](https://dansle noir.com), [Ultraviolet by Paul Pairet](https://ultravioletby.com)

# Experiential Dining: A Win-Win for Stakeholders



Source: [Worldchefs](#), [Hotelecreport](#), [Entrepreneur.com](#), [Restaurant India](#)

# Challenges in Managing Experiential Dining Ventures



## Consistency in Experience

- Experiential dining depends on perfect alignment of food, ambience, and storytelling.
- Even small errors in lighting, music, or service timing can break the immersive illusion.
- As guests return, their expectations rise, making consistency more difficult to sustain.



## High Costs & Maintenance

- Creating immersive themes requires heavy upfront investments in décor, props, and technology.
- These elements wear out over time, leading to constant maintenance expenses.
- The need to refresh or rotate themes adds further recurring financial pressure.



## Complex Operations

- Unlike regular restaurants, experiential dining involves coordinating food service with performances, lighting, and special effects.
- Multiple vendors and suppliers add logistical complexity.
- A single operational breakdown can disrupt the entire customer journey.



## Staying Relevant

- Novelty is the main attraction, but it fades quickly in experiential formats.
- Guests constantly look for innovation, personalization, and fresh ideas.
- Rapidly changing trends in food, culture, and social media make staying relevant a challenge.



## Staffing Challenges

- Staff in experiential restaurants must deliver more than food service - they often play roles within the experience
- High turnover makes it difficult to maintain consistency in storytelling and service style.
- Long hours and performance pressure also increase the risk of staff burnout.

Source: [Wasserstrom Blog](#), [Restaurant India](#)

# Experiential Dining in Goa

# The Opportunity of Experiential Dining in Goa

## Industry Market Size & Growth Drivers

FY24 (A)

INR 1,940 Cr.

Market size of Organized food services industry in Goa

8.1%

FY28 (P)

INR 2,649 Cr.

Market size of Organized food services industry in Goa



### Top Food Destination of India

Goa has been named the top food destination of India in the Godrej Food Trends Report 2025, with 89% of experts voting in favor.



### Surge in Tourists

Goa welcomed 54.55 lakh tourists in the first half of 2025, an 8% rise from 2024, boosting demand for memorable and immersive experiential dining.



### Rising in Dining Out

As per NRAI, overall 24% increase in dining out has been observed in Goa post-COVID, with 39% of diners exploring adventurous cuisines and 33% opting for healthier meals.

Source: [Moneycontrol](#), [ET Hospitality World](#), [TOI](#), [NRAI Report](#)

## Top 5 Experiential Dining Restaurants in Goa





# Royal Enfield, Garage Café

## The Core Theme

"Celebrating motorcycling culture with food, community, and Goan spirit."



## Location: Arpora, Goa Since 2018

Created by Royal Enfield, Garage Café in Goa is a unique experiential space combining a café, bar, vintage motorcycle displays, and waterfront hangout zones.

It serves as a cultural hub for riders, travelers, and locals to connect over food, music, art, and biking heritage.

## The experience and ambience!



**Motorcycling Heritage:** Vintage Royal Enfield bikes and memorabilia create a living museum feel.



**Scenic Riverside Setting:** Open waterfront spaces with relaxed seating overlooking the Chapora River. Rustic interiors, outdoor patios, and art installations further reflect Goa's laid-back yet lively spirit.



**Vibrant Social Hub:** Blend of café, bar, gear store, and event space fostering community.



### Menu

Globally inspired menu with a Goan twist, blending local flavors with comfort foods and gourmet bites.

### Popularity



4.6 ★



31K  
followers

### Average Spend

INR 1,000  
(per person)

# Le Petite Chef

## The Core Theme

"Blending gourmet French cuisine with playful, food-themed adventures, all infused with Goan charm."



## Location: Grand Hyatt, Bambolim, Goa Since 2024

Le Petite Chef offers a globally inspired tasting menu that combines French culinary techniques with regional flavors.

Each course is introduced through an immersive storytelling experience, blending gastronomy with theatrical flair.

## The experience and ambience!



**Holographic Magic:** 6cm-tall Le Petite Chef comes alive via 3D projection, cooking and adventuring on your table



**Theatrical Feast:** Six-course gourmet menu including Goan-inspired global dishes unfolds with the chef's whimsical adventures.



**Interactive Dining:** Travel the Silk Road with themed visuals, music, and props. Shared tables at Grand Hyatt Goa offer joyful group experiences with live table-side touches.



## Menu

Six-course French-inspired menu

## Popularity



4.7 ★



628K  
followers

## Average Spend

INR 4,320  
(per person)

# Birch by Romeo

## The Core Theme

"Inspired by "Nomadic Jungle" – a fusion of untamed natural wilderness, exploratory spirit, and innovative hospitality."



## Location: Arpora, North Goa District Since 2024

Created by Romeo Lane, Birch in Goa is a unique experiential space combining an island bar.

It serves as a vibrant hub for explorers, foodies, and nightlife enthusiasts to connect over innovative cuisine, live music, tropical vibes, and nomadic jungle adventures.

## The experience and ambience!



**Immersive Escape:** Riverfront views, global fusion plates, craft cocktails, and live-acts blending daytime calm with night-time energy.



**Vibrant Nightlife:** Electric beats, laser lights, and disco vibes with gourmet bites and signature drinks for lively gatherings.



**Enchanting Oasis:** Bali-inspired design, friendly service, and tropical warmth creating a serene island charm.



## Menu

Rustic fusion menu blending Indian, Goan, and international flavors with artisanal touches and vibrant plating.

## Popularity



4.7 ★



21K  
followers

## Average Spend

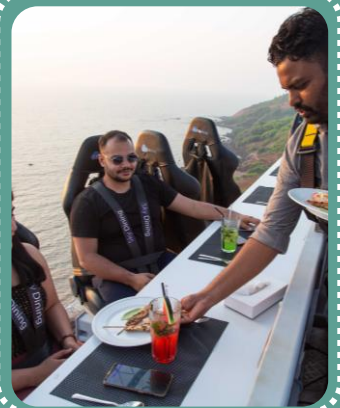
INR 1,800  
(per person)



# Fly Sky Dining

## The Core Theme

"Inspired by Sky Dining Adventure – a fusion of thrilling aerial suspension and gourmet hospitality."



## Location: Ribandar, Panaji - Goa Since 2021

**Fly Sky Dining** in Goa is a unique experiential space combining crane-suspended dining, gourmet multi-cuisine, panoramic views, and adventure hangout zones.

It serves as a thrilling hub for couples, families, and groups to connect over elevated meals and scenic excitement.

## The experience and ambience!



**Elevated Elegance:** Dine 160 feet above ground with panoramic river and city views.



**Magical Ambience:** Rotating tables, soft music, and twinkling lights create an adventurous, romantic escape that shifts from sunset calm to a dazzling night spectacle.



**Culinary Indulgence:** Enjoy gourmet courses, mocktails, and desserts in a refined yet thrilling setting.



### Menu

Curated gourmet menu blending international, Indian, and Goan flavors with multi-cuisine twists served high above ground.

### Popularity



4.8 ★



8.5K  
followers

### Average Spend

**INR 5,000**  
(per person)

# Jungle Café

## The Core Theme

"Blending nature, flavor, and Goan spirit in a serene escape."



## Location: Sangolda, Bardez, Goa Since 2021

**Jungle Café in Goa** is an immersive, nature-inspired dining destination, set amidst dense greenery and rustic wooden architecture, the café blends the charm of the outdoors with refined comfort.

More than just a café, it's an experience that captures Goa's easygoing rhythm — a place to unwind, connect, and celebrate life in harmony with nature.



**Dining Amidst Nature:** Nestled in Sangolda's forested surroundings, Jungle Café offers open-air seating under a transparent roof, with trees, sunlight, and birdsong all around.



**Serene "In-the-Wild" Vibe:** Rustic wooden décor and natural surroundings create a calm, immersive atmosphere unique to Goa. Earthy fragrances, and soft ambient lighting make each meal a retreat for the senses.



**Global Flavours, Local Soul:** Wood-fired pizzas, Buddha bowls, peri-peri chicken, Goan prawn curry, and tropical smoothies blend international comfort with Goan freshness.



## Menu

Menu that blends international, Indian, and Goan flavors with fresh, multi-cuisine twists.

## Popularity



4.8 ★



1.7K  
followers

## Average Spend

**INR 800**  
(per person)

# Our Expertise

# Financial Pitfalls in Managing Hospitality Businesses

## Inaccurate Asset Tracking

1

Struggling to maintain an up-to-date Fixed Asset Register, leading to inefficiencies, ghost assets, and audit issues?

## Lack of Structured Budgeting

2

Operating without a clear, data-driven budget resulting in overspending and poor financial planning?

## Low Visibility into Profitability

3

Difficulty in identifying which verticals, locations, or F&B outlets are truly profitable? Worried about whether your costs are within industry benchmarks?



4

## Operational Inefficiencies

Dealing with lack of standardized processes causing revenue leakages, overstocking, wastage, and staff inefficiency?

5

## Lack of Process Oversight

Are unstructured workflows making it difficult to track data, increasing the risk of compliance issues, errors, and potential financial or reputational losses?

6

## Forecast and Valuation

Need to raise bank or investor funding or looking for a strategic tie up or management partner?



# Where MARC Steps in (1/2)

## 1 Profitability Analysis

Profitability Analysis helps identify the most and least profitable segments of your operations—be it by revenue vertical, location, service line, or time period. We empower decision-making through granular cost and revenue tracking, margin analysis, and benchmarking.

## 2 Information Memorandum & Valuation

We prepare detailed information memorandums for potential investors or stakeholders, alongside industry standard valuations that reflect the business' true market potential and value or USP's.

## 3 Fixed Asset Register

Creation & updation of a comprehensive Fixed Asset Register to ensure accurate tracking, classification, and reconciliation of all fixed assets across locations. This enables a one-stop document to track all assets and calculate precise depreciation that aligns with your business needs. We assist in identifying and implementation of the appropriate software.

## 4 Process Audit

We conduct in-depth process audits to evaluate operational efficiency, identify control gaps, and ensure best practices. Our insights help streamline workflows, improve financial data tracking and accuracy, and drive cost-efficient performance across the organization.

## 5 SOPs Development

We develop and implement tailored Standard Operating Procedures to standardize processes across departments and locations. This ensures operational consistency, internal control compliance, and improved efficiency across the organization.

## 6 Budget

We develop detailed, location-wise and department-wise budgets. Our approach incorporates historical trends, industry benchmarks, and business inputs to ensure realistic, actionable planning that helps businesses stand out against competitors.

# Where MARC Steps in (2/2)

7



## Business Plan

We conduct feasibility studies, market research, and financial modeling to create a data driven and investor friendly business plan.

9



## Location & Infrastructure

We conduct location feasibility studies to assess local market trends, demand potential, infrastructure readiness, and competitive landscape for informed site selection.

8



## Legal Registration

We guide in selecting the right structure based on liability, taxation, and scalability, along with handling registration, GST, and other compliance requirements.

10



## Talent Acquisition

We assist with talent acquisition, role definitions, and performance management systems.

# Case Study – Feasibility Analysis



## Background:

MARC was approached by a client who aimed to create a café brand catering to both locals and tourists in upmarket areas in Hyderabad.

MARC proposed to conduct a detailed market research and feasibility study for this venture to provide critical insights on location viability, market potential, financial planning, and operational setup.



## Project Coverage:

- 1. Market and Location Feasibility:** Analysis of locations considering footfall, demographics, competition, accessibility, and tourist density. Assess leasing feasibility, including terms and rental costs.
- 2. Financial Model and Business Plan:** Estimate setup costs, project expenses, forecast revenue and analyze capital budgeting with payback period, ROI, IRR.
- 3. Legal and Regulatory Compliance:** Identify required licenses, GST registration, and statutory compliances for café operations.
- 4. Business Structure:** Advisory on selecting the optimal legal structure for operations.
- 5. Operational Setup and Execution:** Guidance on space selection, layout and interior design suggestions.
- 6. Technology and Equipment:** Recommendations for POS systems, coffee machines, and refrigeration.
- 7. Implementation Timeline and Roadmap:** Setup timeline from location finalization to launch.

# Case Study – Profitability Analysis

## Objective

A well-known fine-dining restaurant approached MARC to identify strategies to enhance profitability amid declining margins driven by rising costs and shifting diner preferences



## Methodology

1. Reviewed historical financial statements and performed variance and percentage-to-sales analysis to assess revenue, cost, and profitability trends against industry benchmarks.
2. Analyzed outlet-wise performance and segmented revenue by channels and service categories.
3. Evaluated contribution margins, capacity utilization, and seasonal patterns to identify key performance drivers.
4. Assessed F&B consumption, HR, administrative, and overhead costs to highlight inefficiencies and irregularities.
5. Conducted competitor mystery audits and evaluated the company's investment potential through debt or equity.

## Outcomes

The outcomes of the Profitability analysis were as mentioned below:

1. Based on the competitor analysis, an optimal pricing structure for signature dishes was designed to boost profitability and safeguard margins against aggregator commissions.
2. A curated music strategy was developed, aligning specific genres and tempos with the brand identity and customer segments to enhance overall guest engagement.
3. An optimized menu strategy emphasizing diversification and prominence of signature dishes was implemented to strengthen brand positioning and drive profitability.



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