



Curry Capital

The Restaurant Sector
in
London's Brick Lane

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PREFACE

Curry Capital is an exception to the Institute of Community Study's publication rules: normally, we publish only research done inside ICS by our own Fellows. But from time to time we break those rules for work of quite exceptional quality or interest, and *Curry Capital* qualifies under both those heads.

First, it is a unique study of the operation of a key sector of the contemporary London economy: ethnic-minority business. And it has been achieved by extraordinary in-depth observation on the ground. Second, because this sector – the so-called Indian Restaurant industry, operated by Bengali immigrants and their children - forms a local cluster in the Brick Lane area of London's East End, it falls fairly and squarely within the ambit of the Institute's traditional research interests. Indeed, our new book *Race, Community and Conflict in East London* (Dench, Gavron and Young 2005) deals specifically with the same community and its relations with the host white working-class community. So we regard Sean Carey's study as a most striking counterpart to it.

So, when Sean Carey presented a summary of his work to a seminar at ICS in autumn 2003, we were avid to read the original study. And when we had, we were certain that we should give him every opportunity to bring it to a wider audience. It will be essential reading for anyone who wants to understand small-business formation and growth in the contemporary British city. And, as a piece of economic and social observation, it ranks as an outstanding piece of research. We are proud to publish it under the ICS banner.

PROFESSOR SIR PETER HALL

Director, Institute of Community Studies

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I am also indebted to David Tan, the Chinese Liaison Officer of Westminster Council for providing valuable information on the workings of the restaurant sector in London's Chinatown.

The initial study of the restaurant sector in Banglatown on which this paper is based was funded by Cityside Regeneration and the Ethnic Minority Enterprise Project and I am grateful to Andrew Bramidge and Bodrul Islam for their enthusiasm and support for the project.

INTRODUCTION

The socio-economic significance of the Indian/Bangladeshi catering sector in the London E1 area centred on Brick Lane, Hanbury Street and Osborn Street has increased significantly in the last six years. In 1997, there were six restaurants and four cafés, but in 2003 there were 46 outlets which made the area home to the largest cluster of Indian/Bangladeshi restaurants anywhere in the UK – the Rusholme district of Manchester, for example, had 44 comparable outlets, while the Broadway and South Road area of Southall had 27.

In 1997, Cityside Regeneration inaugurated a 'Restaurant Support Programme' which provided funding for four interrelated elements for catering outlets in Brick Lane and surrounding streets: staff training and development; environmental health and guidance and advice; marketing and promotion; and shop front and premises improvement grants. The programme also evolved to take into account nationwide initiatives such as 'Curry Chef of the Year' which began in 1998 as well as the annual Banglatown 'International Curry Festival' which started in 2001.

In 1999, the London Borough of Tower Hamlets authorised the creation of a 'Restaurant Zone' in the Brick Lane/Osborn Street area. This policy positively favoured a change of use of premises to the Class A3 food and drink category, which includes restaurants, cafés, hot food takeaways, pubs and bars. Because of the massive increase in restaurant openings, this initiative was altered in January 2002 and the area between Hanbury Street and Hopetown Street was redesignated as a 'local shopping parade as the primary policy consideration in determining applications for change of use', although the remaining section of Brick Lane/Osborn Street continues to have the status of a restaurant zone subject to normal environmental health and planning rules.

The overall aim of this exploratory study was to document and analyse the pattern and segmentation within the catering sector in the Spitalfields and Banglatown area and answer some fundamental questions. What is the size and socio-economic significance of the catering sector? How do members of the restaurant and café sector define the Brick Lane and/or Banglatown brand? Who are the core customers who visit the area and what is the pattern of segmentation – age, gender, ethnicity and class – within this customer group? Are there significant differences between cafés and restaurants in terms of turnover and clientele? What is the pattern of food consumption at cafés and restaurants through the working week and at the weekend and how does this compare to outlets in other parts of London? Do restaurateurs consider that the area now has too many restaurants, or do they think that there is still space for new businesses? What are the training and staff development needs as defined by local restaurateurs, and is there a need for a local catering college? And, finally, what are the dynamics of the wider Indian restaurant scene in London, and what are the lessons for the restaurant sector in the Brick Lane area?

METHODOLOGY

Interviews were held with owners/main partners (and, in a very small number of cases, where this was not possible, with managers) of restaurants in the Osborne Street/Brick Lane and Hanbury Street areas.

It was not possible to interview the owners/partners (or managers) of two restaurants – Bengal Blues and Le Taj – because of their unavailability in the research period. Seven outlets – Ajwan, Banoful, Clipper, Curry Capital, Khushbu, Prithi, Taal and a second branch of Le Taj – opened after interviewing was completed. This meant that a total of 38 businesses were included in the survey of 35 respondents (with three respondents having responsibility for two restaurants each). The interview schedule was semi-structured in format and arrived at after holding a series of in-depth interviews with seven restaurant owners in December 2001. Interviews were also conducted with a wide range of informants including restaurant staff and managers, shopkeepers involved in supplying provisions to the restaurant trade, owners/managers from other retail and leisure sites in the area like the Vibe Bar and Coffee@Brick Lane, and a senior police officer, as well as representatives from the London Borough of Tower Hamlets' Environmental Health and Planning departments. Two Bangladeshi restaurateurs owning three businesses on the City fringe – Bengal Clipper, Bengal Trader and Kasturi – were interviewed, as well as seven restaurateurs owning businesses – the Cinnamon Club, Masala Zone, Mela, Ram's, the Red Fort/Soho Spice group and tiffinbites – elsewhere in the London area.

Respondents were encouraged to comment on a wide variety of issues and concerns relevant to their businesses and the restaurant sector in general. While this approach was necessarily time-consuming, it was more than offset by the richness of the data thus generated. A few interviews took 45–60 minutes but the vast majority took 1½–3 hours with a few of 4–6 hours duration. Informants were given a guarantee that anything they said or reported would be treated confidentially. Interviews in Banglatown took place in January, February and March, 2002. Interviews with some other respondents took place at later dates in 2002 and 2003. Additional monitoring of the catering sector in the Brick Lane area continued throughout 2003.

The restaurants and cafés (including one takeaway) included in this survey were:

Akash	Aladin
Alishaan	Bengal Cuisine
Bengal Village	Bombay Cuisine
Brick Lane Brasserie	Café Bangla
Café Naz	Café Raj
Café Shan	Chillies
City Spice	Dawaat
Dreamland	Eastern Eye
Eastend Kebabish*	Famous Curry Bazaar
Gram Bangla*	Jafflong
Meraz Café*	Monsoon
Moonlight	Muhib

Nazrul	Nazrul II
Preem Curry & Tandoori	Preem Restaurant
Rice & Spice*	Saffron
Salique's	Shalimar*
Shampan	Sheba
Sheraz	The Spice House
Sweet and Spicy*	

* Designates catering outlets classified as Café.

A considerable time was also spent walking around the Brick Lane, Banglatown area at different times of the day to monitor events and the everyday, routine behaviour of people using the area.

An interim report (drawn up in March 2002) provided the basis for a round of further discussion and consultation with restaurateurs and representatives from Cityside Regeneration, the Ethnic Minority Enterprise Project and other stakeholders. In addition, Westminster Council's Chinese Liaison Officer was interviewed in order to draw salient and relevant comparisons between Brick Lane, Banglatown and Chinatown. This was backed up by a small number of informal interviews with restaurateurs as well as observational research in the Chinatown area.

The final report delivered to Cityside Regeneration and the Ethnic Minority Enterprise Project in May 2002 provided the basis for this paper.

THE EMERGENCE OF THE BANGLADESHI RESTAURANT TRADE

Emigration is a long-established practice in the Sylhet district (and, to a lesser extent, in the Chittagong and Comilla districts), the area from which most Bangladeshis now settled in the UK originate. The political instability of Sylhet has always been an important 'push' factor, but migration was also seen as an escape route out of rural poverty, especially for the younger male members of small land-owning families who went to work in the docks at Calcutta and Bombay and were later recruited as seamen by British (and other) shipping companies.

Because of the nature of this employment, small settlements of Sylhetis have been established since the nineteenth century in ports in a number of countries (including Burma, Hong Kong, Singapore and the USA). But the vast majority of Sylhetis who sought an overseas base, both because of colonial ties and the greater opportunities in sea-going employment, settled in Britain, principally in the East End of London but also in Cardiff, South Shields and Sunderland, all of which had significant shipping connections with India and the Far East (see Carey and Shukur, 1985).

The bulk of first-generation migrants from Sylhet arrived in the late 1950s and early 1960s. They were mainly single men, typically sponsored by their seafaring predecessors who were often their kinsmen or fellow villagers. Many of these migrants settled in Tower Hamlets (which, today, is home to nearly a quarter of Britain's Bangladeshi community), but others ventured further afield to seek out employment opportunities in Birmingham, Bradford and Luton. Those who settled in London's East End often worked as labourers in small factories and, increasingly, as time went on, in the rag trade, employment in which many of the local population (often Jews and Irish from previous migration waves) had rejected because of the poor pay and working conditions. In the mid-1980s, the clothing industry accounted for some 10,000 jobs, which was roughly 20% of available employment in Tower Hamlets. Today, the socio-economic significance of the rag trade has been significantly reduced: perhaps fewer than 500 jobs remain. Some of this employment has been lost to other London boroughs like Newham but most jobs have disappeared as capital has been relocated overseas to countries like Bulgaria, Morocco and Romania.

The restaurant business in Tower Hamlets (and elsewhere), in contrast to the garment industry, has been very much a growth sector. Bangladeshis have traditionally dominated the Indian restaurant sector and this is still very much evident. Of the 9,500 Indian and Bangladeshi restaurants and takeaways in the UK, employing over 72,000 personnel (more than the coal, steel and shipbuilding industries combined) and with an annual turnover of some £2.3 billion, approximately 85% are exclusively owned by Bangladeshis.

Further, the Labour Force Survey conducted in 1997 discovered that over 60% of male Bangladeshi employees and self-employed worked in the restaurant trade compared to 40% of Chinese but only 2% of Indian and 1% of white males (Sly *et al*, 1998). The origins of this contemporary pattern of ownership and employment can be traced to the nineteenth century when the Sylheti seamen recruited by shipping companies

. . . gained something of a monopoly of work as cooks and galley hands aboard British ships and many of them continued in this speciality when they came ashore, establishing tea houses and cafés along the waterfront. These businesses slowly grew in size and popularity, and relatives of those already established came ashore to help them or to start new businesses (Ballard and Ballard, 1977:24).

The massive growth in the Indian/Bangladeshi catering sector (and, indeed, in other forms of cuisine, especially Chinese, Greek and Italian) can be directly linked to the inexorable rise in multiple and differentiated forms of consumption reflecting the globalisation of world cultures after the Second World War. As Goody notes, the old homogeneous 'canteen culture' in the UK

. . . had been a highly socialised form of feeding, carried out collectively whether in the army, in the factory or in communal restaurants (called British restaurants) which showed the restrictions of the limited restaurant culture, with its supplies being rationed and its prices being controlled. That system was highly egalitarian and began to disappear, under pressure of economic growth, expanded supplies, consumer choice and – it has to be said – boredom with uniformity, with egalitarianism (1998:165).

In Tower Hamlets, the number of cafés (mainly Sylheti- but a few Pakistani-owned) as well as an infrastructure of retail outlets expanded considerably in the 1960s, especially in the west of the borough, in Brick Lane and surrounding streets, to meet the demands of single Bengali men living and working in Spitalfields. In the 1970s, with the change in household structures and domestic routines triggered by the reunion of males with their wives, children and other dependants, some of these establishments were transformed into restaurants where the decor, cuisine, availability of alcohol and prices were specifically aimed at members of the white middle-class who worked and studied at the nearby London Hospital and university and polytechnic colleges.

The first licensed Indian restaurant to be established in Brick Lane was the Clifton, which opened in 1974. It had previously operated in the same name as a café under West Pakistani ownership serving Indian and Pakistani food to South Asians and local whites since 1959. (Equipped with an illegal gambling den in the basement, the Clifton was a favourite haunt of the Kray twins and their associates in the 1960s.) The next restaurant to be established in Brick Lane was the Nazrul, which opened under Sylheti ownership in 1977. It was unlicensed. By

1980, four restaurants (two of which were licensed) and four cafés (including the renowned Pakistani-owned Sweet and Spicy) had been established in the area. By 1990, the number of outlets had increased to ten: six restaurants (one of which, the Shampan, which specialised in Bangladeshi cuisine, had won the 'Best Newcomer of the Year' in the *Evening Standard* London restaurant awards in 1989) as well as four cafés. This number of outlets remained constant until 1997, with the main expansion taking place in the last six years, so that by the end of 2003 the area was host to 45 restaurants and cafés with 21 businesses opening since 2000 and three more due to open in the near future.

In part, this trend can be accounted for because of the lack of other business opportunities for Bangladeshi entrepreneurs – particularly the decline in traditional retail possibilities as many local Bangladeshi residents have increasingly chosen to shop in the Green Street area of Newham where the price, choice and range of goods and services dwarfs anything available in Tower Hamlets – as well as the relatively low barrier levels to entry in this sector but, more positively, it reflects economic and business opportunities derived from changes in work, domestic and leisure patterns – particularly the growth in affluent, single-person households living in new urban spaces where 'eating out' has become a pivotal leisure and entertainment activity (along with drinking, clubbing, cinema and theatre-going etc.) in the new night-time economy – for the relatively youthful, middle-class population of London in general and those working in the City in particular (c.f. Chatterton and Hollands, 2001).

Restaurant openings in the Brick Lane area have undoubtedly been influenced by developments in the Indian catering sector elsewhere in London. The success in the mid -1990s of upmarket destination restaurants such as Café Spice Namaste and Bengal Trader located on the City fringe, as well as innovative outlets like Soho Spice located on Wardour Street, W1 (then part of the Bangladeshi-owned Red Fort group), which was the first Indian restaurant in the UK to integrate elements of a significant attitudinal shift that had emerged amongst younger members of the metropolitan middle class in favour of a less formal style of dining (thereby anticipating the 'fast-casual' approach – effectively a dining space lying somewhere between a café and a restaurant – exploited in recent years by chains like Wagamama, Carluccio's, Nando's and Zizzi), created a new framework of possibilities for existing and new entrepreneurs wishing to enter the Indian/Bangladeshi catering sector.

Additionally, the size of the local Bangladeshi community in Tower Hamlets has meant that the catering industry has been able to draw on a large pool of available labour to work as chefs, kitchen staff and waiters (often far more cheaply than if they were employed and lived outside the area) and until relatively recently has not experienced the labour shortages that have increasingly affected many provincial

catering businesses. The presence of several large 'cash and carry' stores in the area around Brick Lane able to replenish stocks at a moment's notice has also been an important factor in facilitating recent expansion of the catering sector.

In summary form, the Banglatown catering sector is an important aspect of the local economy and community for the following reasons:

- It is a significant (and growing) local employer particularly for young male Bangladeshis in the 20–35 age group, who are often recent migrants to the UK having married Bangladeshi young women living in the Tower Hamlets area.
- It is an important component of the small business sector and the service economy (including the tourist sector).
- The restaurant sector has a crucial and immediate multiplier effect for many other local (Bangladeshi and non-Bangladeshi) businesses in Tower Hamlets and especially London and the South East. Local businesses in the Spitalfields and Banglatown area that exhibit a close relationship with the restaurant and café trade include:
 - groceries/cash and carry outlets (Bangla Town, Star Cash and Carry, Taj Stores)
 - off-licences (A & Y Wines, BT, Robbis)
 - music shops providing cassettes, CDs and videos (Brick Lane Music House, Sangeeta)
 - printing services/web design (ekota, i-media, languatec)
 - fabric shops providing table linen (Fabric Wholesale, Modern Saree Centre)
 - mortgage and finance (Apex, Barclays, NatWest)
 - building and refurbishment (H&B Building, Building Construction)
 - accountancy (Hannan & Co., Wahid & Co.)
 - legal services (Corbin Hassan, Gauda Solicitors)
 - cab offices (Parapar and Sonali).

Businesses located in other areas of Tower Hamlets, London and the South East include:

- catering services (Euro Catering, General Catering, UK Catering)
 - chocolates, matches and other promotional items (Kansara's)
 - catering and bar equipment (CMC Group, ND & Co.)
 - dessert manufacturers (Aroma Ice-Cream, Royal Sweets, Star)
 - kitchen design and installation (intigradesign, F&M, ND & Co.)
 - laundry services (Everest Laundry)
 - meat and poultry (WB Poultry)
 - restaurant furniture (Furnital, ILF, Primo, Style and Strength)
 - seafood (Iqbal Bros.)
 - tandoori ovens (Dowd Tandoori, Shaan Tandoori)
 - wines (Desh Wines, Parmar Wines).
- Reciprocal interaction with 'new wave' cultural and creative industries in the Brick Lane area including approximately 250 design, media and music businesses located within the Old Truman Brewery complex as well as coffee outlets, bars and clubs, such as

Coffee@Brick Lane, Café 1001, the Vibe Bar, 93 Feet East and O² Bar.

- Reciprocal interaction with several traditional pubs used by middle class locals (as well as tourists) including the Golden Heart, Jack the Ripper and the Pride of Spitalfields.

In addition, the Brick Lane catering sector:

- Has been a generative centre for the acquisition of entrepreneurial skills and training for Bangladeshis wishing to seek business opportunities in other parts of the UK and the Republic of Ireland (although it should be noted that mainland Europe has yet to be explored to any great extent);
- Has been an important training ground and/or has created a model of employment in the service economy, especially for young Bangladeshi males who increasingly are being recruited to work in the growing number of five-star hotels in Tower Hamlets (Britannia Hotel, Four Seasons etc.) and elsewhere in London;
- Maintains and nourishes important socio-economic networks and institutions both within the local Bangladeshi and wider community in Tower Hamlets as well as London as a whole;
- Projects a dynamic and positive (self- and other-defined) image of the Bangladeshi community as
 - Entrepreneurial
 - Hardworking
 - Economically active
 - Net contributors to an open and vibrant multi-cultural/polyethnic society.

SAMPLE PROFILE

Ethnicity of Owners/Partners

Respondents were asked to identify the ethnic group to which they considered themselves to belong. The dominant ethnic group was of Bangladeshi origin.

- 88% were Bangladeshi (with all but one restaurant owner coming from the Sylhet district. Interestingly, all but two current restaurateurs and café owners were second-generation migrants, the children of Bengalis who had settled in the UK in the 1950s and 1960s)
- 6% (2 respondents) were Pakistani (or, for one respondent, British Pakistani)
- 3% (1 respondent) were Indian
- 3% (1 respondent) were East African Asian

Business Interests

The majority of restaurants in the study were run as limited companies (58%) with a smaller number operating as sole traders (32%) and partnerships (10%). Restaurants trading as limited companies often involved informal partnerships based on 'trust' between friends or members of the extended family. A relatively small number of restaurateurs had multiple and overlapping interests in the catering trade in the Brick Lane area.

A small number of respondents (9%) owned other restaurants outside the Brick Lane area but within Tower Hamlets. Only one respondent (3%) had restaurant interests in the UK outside Tower Hamlets.

No respondents owned restaurants either in Europe or in Bangladesh, Pakistan or East Africa although several respondents expressed medium- or long-term interest in developing restaurant outlets in Europe and/or Bangladesh.

Just over a quarter of respondents (27%) had diversified into businesses (often property, and a variety of retail outlets such as newsagents, travel agencies and hairdressers) outside the restaurant trade, either within the Brick Lane area or elsewhere in the UK.

The ownership of catering outlets was almost exclusively male dominated. One café and one restaurant (6%) had female owners, although another restaurant had a female director.

Just over two-thirds of owners (70%) lived in Tower Hamlets.

The Workforce

The total number of full- and part-time workers reported to be involved in the restaurant trade in the Brick Lane area (which includes 13 working at Bengal Blues and Le Taj) was 292, although informed sources calculated that a more accurate figure was around 400. The vast majority of these jobs were full-time with a much smaller number of part-time workers employed in the evenings and at weekends. Restaurateurs also recruited extra staff, especially members of the extended family (not included in these figures), to work at busy periods like Christmas and festival times such as the International Curry Festival.

Nearly all staff reported to be working in the catering sector were of Bangladeshi origin (96%) with only a small number of Indians, Pakistanis and other nationalities (4%). Ninety-nine per cent of workers were male with only four female workers (and only one of these was full-time) in the entire Brick Lane area. A small number of restaurateurs (9%) had employed women workers as receptionists and waitresses for short periods of time in the past, but claimed that it was extremely difficult to either recruit or retain female staff. However, they all agreed that having female employees was beneficial to the business: respondents claimed that female workers were 'politer' (than males) and helped to create a 'softer' and more 'open' image both for male and female customers. These views were echoed by 66% of respondents who had never had female employees but stated that they would like to recruit them, especially to work on reception and as bar staff.

As one respondent commented:

It's a very good idea. It's something different. In English bars you get women working. But Bengali women won't work in our restaurants for religious reasons. It's our culture. Maybe Indian and Pakistani girls but not Bengali ones.

Positive views on female employment amongst respondents were often strongly influenced by what they had seen elsewhere, particularly in City fringe restaurants. As one respondent noted:

They had an Indian girl in a sari working at Bengal Trader in Artillery Lane. She welcomed people, took their coats and all that kind of thing. It was very nice.

Interestingly, one respondent observed that female employees had a great deal to contribute to the catering trade not least because of their knowledge and expertise in authentic Bangladeshi cooking styles. However, 22% of respondents did not think that female employees would add value to their businesses. Twelve per cent of respondents did not know whether having female employees would give their businesses any commercial advantage.

A comparison with employment patterns in Chinatown is interesting here: it was found that approximately 3,000 people worked in the 75

Chinese restaurants in the area and of this number some 1,200 employees (40%) were female, many of whom were on three-year work contracts recruited from Malaysia and, increasingly, mainland China. Only one restaurant in Chinatown did not employ female waiters, although it did have female kitchen staff. There were only a small number of women partners (ownership was dominated by Chinese males) but there were 10 female managers of catering outlets in the Chinatown area.

Ninety- two per cent of staff working in restaurants in the Brick Lane area lived in Tower Hamlets.

Fifteen per cent of respondents reported that they had recently laid off workers because of the fall in demand particularly after September 11th.

Opening Hours, Seating and Payment

Just over half of restaurants (51%) trading in the Brick Lane area opened at lunchtimes and in the evenings – typically from noon until 2.30 or 3pm and from 6pm until midnight. Three establishments, including one café, opened in only the evenings (the two restaurants had only recently decided to close at lunchtimes because of a fall in trade). Forty-one per cent of restaurants opened all day, typically from midday to midnight (or until 2am if the restaurant had a supper licence). Owners who kept their premises open all day considered that their restaurants gained a sense of liveliness and vitality by doing so and that as long as their businesses could cover basic costs (normally staff costs) it was worth while to stay open in the slower afternoon period. Additionally, a small number of recently opened restaurants had decided to open all day in an attempt to capture any passing trade, hoping this would create more regular customers for their businesses. All the cafés (representing 14% of catering establishments) in this survey stayed open all day, although two closed by 10.30pm.

Only one outlet in the Brick Lane area – Sweet and Spicy, a café – opened at 8am and provided breakfast facilities.

The two largest restaurants in the Brick Lane area each had seating for 160 customers, while the smallest outlet had seating for 24 customers. The total number of seats for all restaurants and cafés (including Bengal Blues and Le Taj) was 2,585. The average number of seats in a restaurant or café was 68.

Nearly all restaurants accepted payments by cash, cheque and credit/debit cards although two cafés accepted only cash and cheque and one café took only cash payments. Respondents were also asked whether they would accept payments in Euros. No one reported that they had yet been offered Euros as payment (although one restaurant manager reported that he had been given some as a tip by a grateful customer). In fact, there was a degree of confusion amongst respondents about the Euro – a few restaurateurs (13%) stated that they would definitely accept them – but the vast majority were ill-

prepared for such transactions: they did not know the exchange rate or the cost of converting Euro cash to sterling (and whether this would be added to the bill). Most restaurateurs stated that they would only get involved in Euro transactions 'when everyone else did'.

Licensing, Lunchtime, Pricing and Busy Days

The majority of businesses (68%) in the study were licensed and (apart from one café) served alcohol. The remaining establishments (32%) did not have a licence and in all except two cases this was because of the owners' and/or customers' religious and cultural preferences. But even where alcohol was not served on the premises, no restaurant (or café) prevented customers bringing their own alcoholic drinks to consume with meals. No restaurant or café levied a charge for this service.

It was revealing that licensed restaurants reported that the average percentage value of alcoholic drinks in meals was approximately 30–40% (and, in some restaurants, as high as 50%) of the total (with Cobra and Kingfisher beers the most popular lines). However, the vast majority of restaurants that were licensed still permitted customers to bring their own alcohol onto the premises. Some respondents reported that this practice had become more widespread in recent years, brought about not through choice but by the constraints imposed by the competitive pressures in the area. It was an effect keenly felt, according to some informants, if licensed premises bordered establishments that did not serve alcohol but did allow customers to bring their own drink. Overall, many respondents reported that they were not happy about this practice but felt they had little or no alternative given current market conditions. They noted that the 'bring your own bottle' trend had had a serious (and growing) impact on margins and the overall profitability of their businesses.

Cafés in the Brick Lane area often catering for local South Asian workers by offering authentic, 'home-style' or 'regional' cooking reported that roughly 80% of their trade was at lunchtime.

However, most restaurants (97%) reported that the percentage of business turnover derived from the lunchtime trade was low – on average worth between 5 and 15% of overall turnover. One restaurant, however, serving a buffet lunch, reported that 40% of overall turnover came from the lunchtime trade. Perhaps significantly, it was the newer (and newly refurbished) restaurants that reported a higher level of lunchtime takings (25%).

Respondents who had been restaurant owners for some years observed that the lunchtime trade in the area had once been healthy; indeed, a few respondents reported that in the early and mid '90s (and, especially, before the opening of Spitalfields Market and the proliferation of 'fast-casual' outlets such as Benugo, Eat, Pret à Manger and Subway as well as coffee bars such as Café Nerro, Coffee Republic and Starbucks on the City fringe) lunchtime business had been worth 40–50% of overall turnover but that it had declined significantly in recent years. It should be noted, however, that a number

of respondents representing City fringe 'Indian'/Bangladeshi restaurants like Bengal Trader and Kasturi reported that lunchtime business was the peak service period and accounted for approximately 60–70% of overall turnover. However, data obtained from interviews and observation suggests that, compared to those frequenting restaurants at lunchtime in the Brick Lane area, these businesses tended to be used by older (40+) male professionals who as senior managers did not experience the time-pressures of younger colleagues and were prepared to pay a premium in order to secure a quiet and relaxed lunchtime meeting-place to discuss business and other matters with their work-friends and colleagues.

A different pattern of lunchtime eating (possibly with major lessons and implications for businesses in Brick Lane, Banglatown) can be found in some West End outlets, which also cater primarily for local office workers like Mela, which opened on Shaftesbury Avenue, WC2 in 2000. For example, a respondent at Mela reported that approximately 35% of turnover came from the lunchtime trade, spread equally on days during the working week but with a small decline in trade on Saturdays and Sundays. The respondent stated that customers were mainly in the 25–35 age range and predominantly office workers (coming for office rather than business lunches) within a ten-minute walk of the premises (or a five minute taxi ride for more affluent types). Customers were more or less equally divided between male and female and roughly 30% were of South Asian origin.

The overall food concept at Mela is 'Indian Cuisine – Country Style' based on village and street foodlines found in India. But the lunchtime menu is clearly focused on the 'Paratha Pavilion' (inspired by old Delhi's lunchtime snack zone at the Parathey Wali Gali) with only a very small minority of customers ordering from the à la carte menu. The 'Paratha Pavilion' provides customers with an enormous range of gastronomic possibilities as well as offering value for money. A 'Simple Snack Lunch' (costing £1.95), for example, provides a spiced paratha made from a choice of white, whole-wheat, maize, millet, sorghum or chickpea flours served with a simple curry or dal. A 'Premium Snack Lunch' (costing £2.95), served with a raita and salad, provides a paratha made from the same range of base flours as the 'Simple Snack Lunch' but with a filling chosen from cauliflower/broccoli, cumin peas, mixed vegetables, and minced lamb or chicken. This interactive complexity carries on to the 'Super Snack Lunch' (£3.95) and through to the 'Gourmet Snack Lunch (£4.50) and 'Mini Meal Lunch' (£4.95). The last item consists of a choice of five breads – paratha, roti, naan, puri and roomali – combined with a choice of lamb rogan josh, chicken tikka masala, fish curry, mixed vegetable korma and Bombay aloo. The meal is accompanied with rice, salad and a variety of chutneys.

Not only are these food lines designed to clearly differentiate the 'Paratha Pavilion' from that offered by traditional 'Indian' restaurants based around the curry, popadom and lager axis, but, importantly, the pricing structure is set to target other lunchtime operations such as McDonald's and Burger King (which deliver food in the £1.95 to £4.95

range), Pret à Manger (£2.95–£3.95), as well as Pizza Hut (£4.50–£4.95).

The male and female staff at Mela – the vast majority of whom have been recruited from the Taj, Oberoi, Sheraton and JP hotel chains in India – aim to serve customers within ten minutes of taking their order, thus ensuring that they can leave within forty-five minutes of entering the restaurant. It is no accident that Mela enjoys a high degree of customer loyalty. Around 80% of the lunchtime trade during the working week was reported to be made up of regular customers with a majority visiting every two or three weeks and a minority two or three times a week.

A similar pattern of food consumption at lunchtime can be found at Masala Zone (part of the Masala World group which owns destination restaurants Chutney Mary and Veeraswamy), which opened on Marshall Street, W1 in 2001 (adding a second outlet on Upper Street, N1 in 2003), and which took elements of Mela and combined them with the canteen style of operations to be found at the pan-Asian Wagamama chain. The respondent at Masala Zone reported that approximately 35–40% of the restaurant's overall turnover was derived from the lunchtime trade (with equal numbers of male and female customers predominantly in the 25–40 age-group). And, as with Mela, it was interesting to note that most of this trade came not from the consumption of items from the 'heavier' end of the menu (for example, thalis, which were dominant in the evening period) but from the eclectic and concept-led 'Earthy Street Food' and 'Special Light Lunch Menu' which consisted of tasty but not highly spiced items like 'Gujarati tiffin boxes' (costing £3), 'non-vegetarian snack box' (£4), a selection of sandwiches – chicken burger, chicken tikka on ciabatta, chicken tikka club sandwich, Bombay layered vegetable sandwich – all priced around £3.50, as well as three different types of noodle bowls providing chicken (£4.25) and vegetarian (£3.75) options as well as six different types of one-plate curry and rice dishes (lamb, chicken and three different types of vegetable dishes priced between £3.75 and £5). Additionally, the lunchtime (and evening) menus change weekly and seasonally to provide variety, and special orders, for example, wheat-free breads and root vegetable-free meals, can be ordered to accommodate customers with food allergies/intolerances as well as particular cultural and religious preferences. (Incidentally, these 'healthy food' choices have been instrumental in generating enormous amounts of positive publicity for both Masala Zone and Mela.) With a fairly restricted menu and portions cooked in batches, service is extremely fast and friendly (management deliberately recruit those with outgoing personalities, 70% of whom are female), which fits extremely well with Masala Zone's 'Real Indian Food at Unreal Prices' and 'Food to Go' concept.

Other central London outlets pursuing a 'fast-casual' approach to the lunchtime Indian food sector include Chowki (part of the Mela group), which specialises in an ever-changing menu based on distinctive regional cuisines from the sub-continent, Rasa Express and Joshi's.

One of the most intriguing newcomers to the 'fast-casual' market is the fast expanding tiffinbites chain – 'real Indian food in an instant' – which started operating in 2003. It has branches in the Cannon Street, Liverpool Street and Moorgate station areas as well as Wardour Street, W1 (with plans for a nationwide network of fifty outlets in the next five years). Opening times are designed to fit the needs of local workers with some branches opening at 6.30am while others close at 10pm, offering customers a range of microwavable snacks and meals (breakfast, the Lunch Wallah Club and the Supper Club) that can either be eaten on the premises, taken away or delivered by staff to local offices. The split-level container meals on offer providing rice, vegetables and a choice of chicken, lamb, fish or prawn, vegetarian and even a high protein, low carbohydrate option for those following the Atkins and similar high-protein diets, cost between £4.64 and £7.05. Wraps filled with organic ingredients retail at £2.70 to £2.95, while 'street foods' such as samosas and onion bhajis cost between £1.50 and £3.25. Interestingly, some 20% of turnover is derived from the breakfast market where, in addition to the items listed above, lighter choices including muffins (£1.30) and freshly cooked naan breads, either with butter (£1.30) or cheese, spicy potatoes, savoury mince or almonds and sultanas (all at £1.50) accompanied by a choice of drinks including coffee (£1.30), spicy chai tea (£1.30), mango lassi, as well as a variety of juices and smoothies. The average amount spent by customers for all meals across the day was reported to be £4.50. It is clear that tiffinbites is a serious attempt to redefine the meaning of at least some aspects of the Indian food experience not only as a 'light' and 'healthy' food option – 'We don't want customers to have a bloated stomach and bad breath after eating one of our meals', explained the respondent – but also as a time-effective eating practice allowing eat-in customers to complete their meal within a fifteen-minute time-frame.

In contrast, it was found that only one of the restaurants (except for the cafés) in the Brick Lane area had broken out of the traditional and now largely out-of-date formulaic 'lunchtime special', which many customers perceive as too 'heavy' a meal at midday. Indeed, in the majority of restaurants in the Brick Lane area, it was found that customers were offered a fairly standard three-course meal priced between £5.95 and £7.95. Respondents reported that once the cost of drinks was added to the meal, the average cost rose to somewhere between £9 and £12. Only one restaurant – Café Naz – served food at lunchtime on an 'eat as much as you like' buffet basis, reporting that it accounted for some 40% of turnover. However, another respondent from a small restaurant reported that he had tried a lunchtime buffet when his restaurant first opened (in 2001) but that it had not been profitable: he maintained that it had been difficult to predict demand (and, therefore, supply) and pointed out that any food left over at the end of the day had to be thrown away. In short, offering customers a buffet had not been cost-effective in his experience. It seems likely that it would take around five or six restaurants to try new lunchtime menus (including buffets) for the area to gain a viable reputation as a lunchtime destination spot.

A few restaurants offered an 'evening special' (once again some variation on a three-course meal) but most restaurants simply offered

customers a fairly traditional and wide selection of dishes from the à la carte menu. The evening trade was estimated to be worth 85–95% of turnover by restaurateurs but only 20% by café owners. The average cost of an evening meal was estimated to be £2 or £3 more than a lunch, averaging £12 to £15 per head. The average cost of a meal (lunch or evening) at a café in the Brick Lane area was around £4 or £5 per head.

Respondents running restaurants (rather than cafés which had a much more even and regular customer flow) reported a definite split in demand for evening (and lunchtime) meals during the week. Quiet days were reported as Monday, Tuesday and Wednesday and busy days were Thursday, Friday and Saturday. This pattern of evening meal consumption skewed towards the end of the working week contrasts strongly with that found in some West End outlets. For example, Mela restaurant has a much more evenly balanced level of trade throughout the working week derived in large part from the publicity it has achieved from running annual food festivals. In 2001, Mela held a three-month 'Ayurvedic Food Festival', which highlighted the health-giving and medicinal properties of numerous elements and ingredients, used in Indian food (e.g. fenugreek, garlic and turmeric etc.) as well as the cuisine's suitability for those suffering from diabetes and allergies/intolerances to wheat, milk products and nuts. Using celebrity chefs from India, the festival received widespread media attention with positive feature articles in the *Evening Standard*, *Sunday Business*, *Metro*, *The Times* and *Sunday Times* for its innovative approach to and development of Indian food. In this way, Mela has been able to reposition its delivery of Indian food as an everyday food choice for middle-class Londoners, rather than a cuisine strongly or exclusively associated with a hedonistic and celebratory mealtime marking the end of the working week.

Sunday trade in the Brick Lane area was mixed; some restaurants noted a relatively heavy demand, particularly in the evening, whereas other restaurateurs noted that Sunday was normally a quiet day. Respondents observed that the Sunday market in the Brick Lane/Wentworth Street area had some but not a major impact on either the daytime or evening trade. What is perhaps more surprising is the lack of trade for restaurants in the Brick Lane area that might be expected to be derived from the Sunday Spitalfields Market which (as a sort of smaller scale but socially more prestigious and 'greener' version of Camden Market) draws large numbers of affluent, white, middle-class people (as well as foreign tourists) into the E1 area for shopping and leisure. The lack of demand at Sunday lunchtime and in the afternoon period for restaurants in the Brick Lane area may be explained, in part, by the number and availability of fast-food stalls in the Spitalfields Market area serving meals and snacks at affordable prices – £3, for example, will purchase a chicken curry and rice at the Tandoori Hut – but it also highlights the absence of suitable culinary, cultural and leisure activities that would attract members of this diffuse 'green' grouping to visit restaurants in the Brick Lane area. Further, not all businesses in the Brick Lane area fail to benefit from the influx of people into the area on a Sunday; the owner of Coffee@Brick Lane

reported that his takings on a Sunday were 'worth two normal days' and the manager at the Vibe Bar noted that Sundays were often one of the busiest days of the week, particularly if a musical event – a jazz or reggae band were playing, for example – was held on the premises.

Seasonal Variations

Respondents owning restaurants observed that there were significant variations in customer levels at different times of the year. The busiest times were clustered around two periods – April, May, June and July, and October, November and December. Quiet months were clustered around January, February and March, as well as the traditional holiday months of August and September, although this effect had been offset to some extent by the International Curry Festival which, since 2001, has run for a two-week period in the early part of September. Respondents estimated that the proportion of annual turnover in the five quiet months of the year amounted to around 10–15%, while the seven busiest months accounted for 85–90% of annual turnover.

Respondents owning cafés serving mainly South Asians living or working locally reported a much more even trade across the entire year with no significant seasonal variations.

The Effect of September 11th

All respondents reported that there had been a significant drop in trade in the aftermath of September 11th. Some restaurateurs claimed that business declined by as much as 70–80% in the four weeks following the attack in New York and that, although trade had picked up at the Christmas/New Year period, it was slow to recover. In fact, some respondents claimed that the January, February and March 2002 turnover was still down by 40–50%, although most put the figure at around 20–30% (and this decline was still being reported by some respondents at the end of 2003). Respondents attributed this fall in revenue partly to the absence of foreign tourists, especially American, Canadian and Japanese, visiting the area but also a presumed reluctance by white customers to enter what they perceived as a 'Muslim' area. Only two restaurateurs (5%) claimed that business had returned to normal levels.

Café owners reported a much less marked deterioration in trading conditions after September 11th and that business turnover was more or less back to normal.

Street Calling/Canvassing

Just over half of respondents (51%) reported that they employed a specific member of staff to stand on the street and invite prospective customers into their restaurant. Nearly all informants, however, claimed that they did not like this practice and many claimed that it was ruining the reputation of the area as well as being a waste of manpower – although one owner of a recently opened restaurant claimed that it was an effective practice and was, as he pointed out, much cheaper than

advertising in the *Evening Standard* – but it was something they felt obliged to do if nearly everyone was doing it. Street calling or canvassing – ‘pulling customers’ as it was termed – was, according to many respondents, leading to tensions and bad feeling between restaurateurs. As one respondent said:

Last night [Saturday] I got very angry because two restaurants on the other side of the road were offering big discounts. That was bad enough but then their people started to cross the road and take my customers. I’m getting fed up. I’ve had a meeting with one of them. But he just said, ‘This is business, I’ve got to do it.’ But that’s not business, that’s prostitution. We’re becoming like a red-light district.

A number of respondents were concerned that aggressive canvassing would eventually drive a large proportion of customers out of the area. One said:

The other day a lady customer told me that she’d been pulled by her dress to go into a restaurant up the road. She told them, ‘Don’t touch me like that!’ She was very upset and angry about it. She came here and told me about it. She said she didn’t know whether she’d ever come back to Brick Lane after this. This is very bad. It makes the place a bad area. What does it show people?

Respondents reported that street calling/canvassing had started a few years ago but that it was now more prevalent and pursued more aggressively, particularly after the recessionary pressures that had built up after September 11th, and which had had such a markedly negative impact on trade over Christmas and the New Year. Respondents observed that street calling was often coupled with the practice of offering customers discounts on meals, free bottles of wine, popadoms etc. In fact, under half of restaurants and cafés (41%) claimed that they never offered discounts to customers. Sometimes this was out of principle and the fear that it created the ‘wrong’ (i.e. low status) image for the restaurant (and, indeed, the area generally) but often this was because the price of meals was already low and there was no way to make further price cuts without seriously eroding profit margins or tinkering with the structure of the meal, for example, by providing customers with smaller portions. One respondent said:

All this street business and cutting prices is killing the area. And the customers won’t have any respect for us if we carry on like this. Not only that but we’ve already lost the respect of our people who’ve got businesses outside the area. They hate us. They laugh at us. They think we’re like the worst sort of beggars. If we don’t learn about price very quickly, in five years’ time there won’t be any restaurants. It’ll be like the rag trade. We’ll go the same way and disappear.

It is revealing that, although many of the restaurants in Chinatown pursue a competitive pricing policy, only two out of the 75 restaurants in

the area offer customers a discount. Moreover, active street canvassing like that found in Banglatown is unknown: only two restaurants employ people to stand outside and distribute leaflets to the passing public. This clearly reflects the fact that, although restaurants in Chinatown offer customers a largely undifferentiated cuisine based on Cantonese and Peking styles of cooking adapted to Western tastes, the market has used the pricing mechanism to segment into three categories – a mid-market category consisting of a relatively small number of around seven destination restaurants offering some novel food lines and good service (e.g. China City, Golden Harbour, Jade Garden and Luxuriance etc.); a populist, mass consumption category consisting of some sixty-three outlets largely dependent for trade on footfall (e.g. Aroma, China China, Fook Nam, Mr Kong and Wong Lee etc.); and a budget sector of around five restaurants providing food on an ‘eat as much as you like’ basis from as little as £4.95 (e.g. Hong Kong Diner, Yee Fung and Mr Wu etc.). It is this category segmentation based on price and service that maintains a large degree of equilibrium within an otherwise highly competitive marketplace in Chinatown.

Profitability and Turnover

Respondents with established restaurants (trading for more than two years) were asked whether their business was growing, decreasing or simply static measured on an annual basis (and to discount, if possible, the effects of September 11th). Only two respondents claimed that their businesses were growing, with the remainder stating that turnover was either static or in decline to a greater or lesser extent (estimates varied between 5% and 30%) Respondents stated that the increase in the number of restaurants in the area without a corresponding increase in customer flow inevitably meant that average revenue per restaurant had decreased in the last few years. It is, none the less, significant that restaurants that were ‘behind the times’, either in terms of decor and/or the style and quality of food, indicated a greater drop in custom than businesses that had adopted a more ‘progressive’ approach. Location was also a factor: restaurants on Brick Lane near the Hanbury Street junction reported less of a decline than restaurants elsewhere in the area, particularly businesses in relatively isolated positions along Brick Lane as well as many of those located on Hanbury Street, particularly on its eastern side. Significantly, restaurants and cafés that occupied corner sites reported more buoyant levels of trade than many of their neighbours. This is consistent with the high level of footfall in the area with, by and large, the area being the destination rather than the particular restaurants within it.

Observation and interview data revealed that another element in relatively successful trading amongst outlets related to staff levels and attitudes. It was noticeable that a small number of restaurants that had managers or staff who were able to successfully engage with customers – minimally greeting and saying goodbye and maximally entering conversations around anything from football and cricket to London property prices – enjoyed a significant level of return visits from customers who appreciated the interaction and dialogue with staff. This

pattern is consistent with research undertaken in other major cities. As Zukin, drawing on data collected in New York, perceptively observes:

Waiters are less important than chefs in creating restaurant food. They are no less significant, however, in creating the experience of dining out. For many people, oblivious of the restaurant workers' social background, waiters are actors in the daily drama of urban culture . . . A restaurant's style is both implicitly and explicitly negotiated by waiters and management. The accents and appearance of waiters affirm distinctions between restaurants as surely as menu price and location. (1995: 154–155)

Just over two-thirds of respondents reported that their restaurants (70%) were still profitable although a minority (14%) reported that their businesses were unprofitable and that they faced an uncertain future. About 1 in 7 respondents (14%) claimed that their restaurants were breaking even.

Respondents were also asked to provide an estimate (and, for new businesses, a projection) of their annual turnover of their businesses. Nearly 1 in 6 (16%) refused to give an answer to this question. Of those who did (84%), the most successful restaurant in the area reported an annual turnover of £800,000 and the least successful, £40,000. Most average-sized restaurants reported an annual turnover between £300,000 and £450,000 and smaller establishments £150,00 to £250,000. The annual turnover for all the restaurants and cafés in the Brick Lane area (including Bengal Blues and Le Taj) based on respondents' replies but also, critically, on the local knowledge of well-informed informants, was calculated to be worth some £18 million annually in 2002.

CUSTOMER PROFILES AND MARKET SEGMENTATION

Age and Social Class

Respondents were asked to comment on and identify the age and aspects of the social profile of their core customers. All informants owning mainstream restaurants reported that nearly all their customers were drawn from relatively youthful, well-educated middle-class social groups primarily composed of financial, knowledge and service personnel either working in the City, the Old Truman Brewery and the Hoxton/Shoreditch area and/or living relatively locally in the new urban spaces of Tower Hamlets, Hackney and Islington.

Observation and information from interviews suggested that a few restaurants in the Brick Lane area attracted a slightly more affluent, sophisticated and older clientele (including some drawn from London suburban locations and Essex, particularly at weekends). At the other extreme, one restaurateur estimated that 50–60% of his customers were students, after he had instigated a successful leafleting campaign targeting those who attended the nearby Guildhall and City universities with the promise of quality food at bargain-basement prices.

The average age profile of customers for all outlets was estimated by respondents to be:

18–25	5%
25–34	70%
35–44	20%
45+	5%

The dominance of the 25–34 age-group using restaurants, bars and other leisure activities is in line with data from other areas of London, for example, Westminster. It should be noted, however, that the demographic trend is for this age-set to decline in numbers in the near future with the 35–44 and 55–64 age-groups experiencing the largest growth and the 16–24 group set to exhibit the largest fall (see West End Entertainment Impact Study, 2001:44). It is likely, therefore, that there will be increasing competition between different areas of the capital to cater for the high-spending, middle-class 25–34 age group. Additionally, the demand for restaurant services is expected to rise less rapidly than has been the case over the last decade, although it is possible that this will be offset to a large extent by the strengthening of the under £20 a head food market segment.

Gender

Respondents were asked about the relative proportions of male and female customers visiting their restaurants. Some of the older, established restaurants reported a predominantly male-dominated

clientele – approximately a 70:30 male/female ratio (with a few reporting a higher 80:20 ratio) which may, in large part, reflect the traditional male bias/group bonding involved in ‘going out for a curry’ as part of an evening’s entertainment. But most respondents reported that their restaurants had something like a 50:50 male/female ratio and observation revealed a high proportion of mixed-gender groups. A small number of respondents, however, claimed (backed by observation) that the majority of their customers were female in an approximate 60:40 ratio. Significantly, respondents in this last category owned newer-style eateries, smartly furnished, offering a more differentiated and ‘lighter’ style of cuisine often emphasising fish and vegetarian choices. This pattern of consumption signifies both the economic strength of female consumers and their demand for quality venues and outlets.

Café-style establishments serving the local South Asian population reported a marked male bias in their customer base with one respondent stating that 90% of his customers were male.

Ethnicity

All mainstream restaurants reported that their clientele was overwhelmingly white, especially during the working week, with much smaller numbers of customers drawn from other groups. Averages reported were:

White	81%
Bangladeshi	5%
Other South Asian	6%
African-Caribbean	3%
Other (Chinese, Japanese, Korean)	5%

Cafés serving authentic Bangladeshi and other South Asian regional foods specifically targeting the local Bangladeshi community and other South Asians (Indians, Sri Lankans and Pakistanis) working in the area reported figures that were, in many respects, near mirror-images of the above numbers. The average values of the different ethnic groups using these establishments were as follows:

Bangladeshi	80%
Other South Asian	10%
White	8%
African-Caribbean	2%

Other Aspects of Customer Profiles

Individuals and groups: Observation and interviews with respondents indicated that the number of individuals dining alone was very small – perhaps as low as 2% in restaurants (mainly at lunchtimes) and a slightly higher 5–8% in cafés. It is clear, therefore, that eating out in the Brick Lane/Hanbury Street area is very

much an 'expressive' group or communal experience. Interviews with restaurateurs suggested the following figures:

Lone/single diners	2%
Couples	20%
Groups (3+)	78%

Most respondents estimated that the value of larger party-groups (8+) in the last figure of 78% was approximately 10% of this number, although a few restaurateurs who had a separate room/space for parties calculated that party-groups were probably worth 20% of their overall turnover.

City workers: Mainstream restaurants estimated that between 35% and 85% of their clients worked in the City (with an average of 68%). Café owners estimated that only 8% of their customers were City workers.

Tourists: Restaurateurs estimated that approximately 25% of their customers were foreign tourists – predominantly European (French, Dutch, German and Scandinavian), US, Canadian and Far Eastern (Chinese, Japanese, Taiwanese and Korean). Café owners estimated that only 5% or 6% of their customers were foreign tourists.

Students: Restaurateurs calculated that between 5% and 10% of turnover was derived from students. Café owners estimated that students only contributed to 2–5% of business turnover.

Regulars: Most restaurateurs estimated that less than a third (30%) of their customers were regulars (visiting more than once a month). A few respondents claimed that there was now very little regular trade as customers circulated from one restaurant to another, often responding to the enticement of special offers, discounts and other inducements offered by staff canvassing on the streets. But interviews and observation revealed that the relative absence of regular customers at many outlets seemed to have a greater effect on restaurants offering cheaper food than those at the top end of the market where a slightly higher price, together (although not always) with innovative food lines and (as noted earlier) better service practices clearly acts as a marker of quality differentiation in the minds of consumers. Indeed, a number of respondents expressed their concern that the area was progressively losing status and was in danger, as one informant wryly observed, of becoming the 'Costa del Curry' rather than the 'Curry Capital' of London (or, indeed, the UK). Another informant with a perspective derived from a restaurant located on the City fringe observed:

Good clientele are shying away from Brick Lane. More and more people are going for a cheap curry but not a good curry. It's good for the bargain hunter but not the food lover. If business practice doesn't change dramatically, Brick Lane will carry on going down-market.

In fact, both these informants have identified a dangerous but growing trend in the area: while choice tends to stimulate demand and competition often creates a 'buzz' atmosphere for consumers, the sort of explicit discounting (and other special offers) done on the doorstep at street level in the Brick Lane area has only succeeded in making some customers – both male and female – more sensitive to price. Observation revealed that they would – deliberately, systematically and, from their point of view, quite rationally – play one restaurant off against another in order to minimise their expenditure. The obvious problem is that if this change in customer behaviour continues and becomes even more widespread and deeply entrenched, it is probable that the area will attract ever larger numbers of marginal (i.e. price sensitive) customers while alienating the more affluent customers who, fed up with what they perceive to be unwarranted harassment, have already, to some extent, and, it is predicted, will increasingly, take refuge in establishments outside the Brick Lane area. While Brick Lane, Banglatown should undoubtedly encapsulate the virtues of a 'value for money curry', which is a multi-dimensional and differentiated concept, the area should not be perceived by consumers as a place to purchase a 'cheap curry', which is a one-dimensional and non-differentiated concept. Significantly, perhaps, respondents owning City fringe restaurants estimated that approximately 80% of turnover was derived from regular customers.

Café owners in the Brick Lane area reported a much higher level of regular trade (approximately 90% of turnover) than their restaurant counterparts.

Families: All establishments claimed that they were 'family friendly' with visits ordinarily taking place at the weekends and in the school holidays. The average value of overall turnover was 5% in restaurants and 8% for cafés. Observation and information derived from interviews indicated that restaurants tended to attract white, middle-class families, while the cafés were visited by Bangladeshi and other South Asian groups.

Menu selection and differentiation: Just over half of restaurant respondents (including three of the biggest outlets) stated that their customers preferred a range of 'traditional' dishes – chicken tikka masala, chicken balti, chicken korma and lamb pasanda – but other restaurants, particularly some of the newer, smaller outlets reported that they had broken out of this conventional territory to a greater or lesser extent and that new lines – chicken rezala, chicken shatkora, fish kofta masala and the variety of dishes listed under 'Chef's Special' (some of which had been highlighted in the 'International Curry Festival') – were actively sought after by young affluent professionals interested in pursuing both 'authentic' and 'novel' food lines as an expression of their (self-defined) cosmopolitan taste, sophistication and exclusivity.

All establishments served a wide variety of vegetable dishes and respondents were asked to estimate the numbers of customers who only consumed vegetarian food. The lowest estimate from restaurant

owners was 3% and the highest was 35% with an average of 18%. Cafés estimated that only a relatively small number of customers (5%) ate exclusively vegetarian food, preferring fish and meat dishes.

Significantly, no restaurant in the Brick Lane area had yet explored the differentiated and deliberately restricted and focused menus available at relatively new entrants to the 'Indian'/Bangladeshi restaurant sector in London like Café Lazeez, Ginger or Parsee which offer customers a choice of only eight or nine main courses (together with a small number of starters and desserts).

Home and office delivery: Nearly all restaurateurs reported that takeaway/home delivery was a small and marginal part of their business (amounting to some 2-3% of turnover). A number of respondents said that home delivery was only done on request and largely offered as a service to regular customers and not something they wanted to develop. 'It's just hassle,' explained one respondent. Just over a third of restaurants (34%) provided a (very occasional) home delivery service. Three restaurants in the Brick Lane area (8%) that were not doing particularly well had, however, targeted residents in white, middle-class districts around Bow, Poplar, Whitechapel and Hackney and claimed that the takeaway/home delivery trade was worth almost half their overall turnover (48%). In addition, two establishments specialised in the takeaway/home delivery niche. None of the cafés ran a home delivery although they did provide a takeaway service.

Just under a quarter of restaurants (22%) provided an office delivery service, which was estimated to be worth only 1% or 2% of overall turnover by respondents.

Only two restaurants (6%) had an on-line delivery service.

Drinking (and the influence of the Vibe Bar): Respondents were asked to estimate how many of their customers had gone to a pub or bar before visiting their businesses in the evenings. Café owners thought that only a very small proportion of customers (perhaps 2%) had visited a pub or bar but respondents owning restaurants stated that the majority of their customers (60–80%) went for a drink before coming to their premises. This effect was particularly noticeable towards the end of the working week and at weekends when customers were in celebratory, leisure-time mode. There was very little difference in terms of gender – respondents reported that equal numbers of males and females had been for a drink, which probably signals the gender-democratic aspect of alcohol consumption in contemporary urban lifestyles. In fact, the importance and significance of this trend is clearly reflected in the recent strategy of some West End restaurants like the Red Fort in Dean Street, W1 (and even those further afield like the Bengal Lancer in Kentish Town Road, NW1) to give up some of their dining space and establish theme bars separated (to a greater or lesser extent) from the main restaurant area and where alcohol/drinking is the dominant and food a subsidiary category available as a 'snack' rather than as a 'meal'. This pattern is also visible at some City fringe restaurants: for example, the Bengal Trader in

Artillery Lane, E1 has its restaurant area on the ground floor while drinks and snacks ('bar food') are available in the basement area.

Respondents in the Brick Lane area were keenly aware of the generative effects of the Vibe Bar (and its surrounding leisure sites) on the restaurant trade. It attracted young people into the area (in a way that many of the traditional pubs in the area did not) who often interspersed an evening out with a meal, particularly at weekends. All informants agreed that this effect was spatially restricted and localised: it was the restaurants on Brick Lane clustered around Hanbury Street that were the principal beneficiaries of the footfall or pedestrian flow emanating from the Vibe Bar area – an effect, according to informants, that disappeared completely at the northern and southern edges of the Brick Lane area. Respondents with restaurants that did benefit estimated that around a quarter of their turnover was derived from young people coming from the Vibe Bar area. Indeed, several respondents commented that the restaurant business in Banglatown would be considerably strengthened if a more pro-active planning policy was pursued which encouraged the development of a designated number of independent bars (comparable perhaps to those that have proliferated in the Hoxton/Shoreditch area). As one respondent said:

The Vibe Bar and 93 Feet East are a plus for Brick Lane. But there needs to be more pubs and clubs and play areas for young people. You cannot promote the area just by having restaurants. There has to be a level of co-ordination between food, drink and other things.

A few respondents perceptively observed that there was little in the area to attract the 35–44 and 45+ age-groups (which, as noted earlier, are set to grow in terms of economic importance and significance) and that new facilities ought to be developed, possibly in the Osborne Street area and the southern end of Brick Lane already populated by two popular restaurants, Café Naz and Bengal Cuisine, where there were few residents, and which would also have a beneficial effect in creating and maintaining a spatial separation of the different age-sets using the area. One respondent commented:

It would be great if there were a theatre, comedy club or even a multiplex cinema like you've got in the West End. People could come into the area, have a meal and then catch a show or film.

BUSINESS AND OTHER ISSUES

Opening Hours

Respondents were asked whether they wanted longer opening hours for their restaurants. Just over two-thirds were in favour of an extension and of this number (69%):

- 15% wanted an extra hour
- 30% wanted an extra 2 hours
- 9% wanted an extra 3–4 hours
- 15% wanted a 24-hour policy that would provide greater flexibility in opening times.

Respondents wanting an extra three or four hours and those wanting a flexible twenty-four-hour policy calculated that the higher level of demand/customer flow they anticipated following any change in opening times would lead to a 25–30% expansion in their restaurant's workforce. When questioned on the noise nuisance, informants pointed out that customers leaving restaurants were rarely noisy and that the main nuisance came from 'pirate' or illegal mini-cabs sounding their car-horns and shouting to attract prospective customers' attention at night time. Two respondents pointed out that the bagel shops at the northern end of Brick Lane were open twenty-four hours in an area of mixed (including residential) use and it seemed unfair to penalise the restaurant sector in comparison.

The respondents (31%) who were not in favour of longer hours cited the following reasons for not changing the existing policy:

- The existing (low) level of demand
- The increased risk of drunken and anti-social behaviour in the area
- Staff health problems if forced to work longer hours
- The additional costs of introducing a shift system for employees.

Leasehold/Freehold

It is significant that the overwhelming majority of the restaurants and cafés in the Brick Lane area (89%) operated under the leasehold system (i.e. only four properties, 11%, were freehold). Some respondents felt that leasehold was a system that, in the words of one informant, 'You've just got to live with', but others had deep misgivings – rents, as respondents correctly observed, increased but never decreased and, with the benefit of hindsight, it was a relatively inefficient method of investment compared to the capital appreciation enjoyed by freeholders particularly in recent years. Indeed, a significant number of respondents feared that rent increases would eventually kill most of the restaurant outlets in the area, leaving only the bigger

players at the top end of the market. As one partner in a budget restaurant explained:

At the moment I'm paying £15,000 in rent and £5,000 in rates. But now the landlord's asking for £30,000. We're in negotiations but I can't afford that kind of price. If it happened, I'd go bust. This area's getting complicated. It's all pressure, pressure, pressure. VAT people, tax people – you don't know which way you're going.

A number of respondents also highlighted the connection between ever-increasing cost pressures derived in large part from the leasehold system which necessitated long working hours and the decreasing attractiveness of the catering sector especially compared to other forms of employment for younger members of the Bangladeshi community. As one respondent observed:

If rents are going up all the time where are you going to make a profit? It's okay when you can work hard but our children don't want to work an 80- hour week. They want a 36-hour week. That's more than enough for them.

Respondents also highlighted the difficulty of acquiring suitable freehold properties in the Brick Lane area. As one respondent explained:

Nobody wants to sell a freehold around here. It's a diamond area; it's next to the City. It wasn't like that ten years ago but now everyone wants to hang on to what they've got.

More Restaurants?

Just over three-quarters of respondents (78%) thought that Brick Lane/Banglatown could not support any more restaurants: in fact, some respondents considered that there were already too many restaurants chasing too little custom in the area. Others within this group, however, were less pessimistic: they considered that, although the market was saturated at present, specific improvements, notably a better environmental infrastructure, improved transportation in and out of the area (including improved parking provision) and, critically, better marketing, could create opportunities for both new and existing restaurant outlets.

It was interesting, nevertheless, that nearly a quarter of respondents (22%) thought that the area could cope with more restaurants. When asked to specify what type of food outlets they thought would fit into the area, all informants agreed that the gap was at the higher end of the market and that any newcomers should be of a 'high standard' with 'good food', 'good management' and 'good service'.

Nearly all respondents were sceptical that the existing Brick Lane brand could be stretched to include other oriental food lines like Chinese or Vietnamese (which, in any case, have their own brand territories in

Soho or streets like Kingsland Road and Mare Street in Hackney) because, as one informant neatly put it: 'Everyone comes down Brick Lane for a curry.' However, two respondents considered that Thai and, particularly, Burmese (because of its fusion of Indian and Thai cuisine) outlets could operate successfully, if not alongside existing restaurants, then elsewhere within the neighbourhood on streets such as Bethnal Green Road, Whitechapel Road and especially the increasingly prestigious location of Commercial Street.

Pedestrianisation

Just over two-thirds of respondents (68%) reported that they were in favour of a pedestrianisation experiment. They thought that pedestrianisation would help in creating a new and dynamic image for the area. Some respondents stated that pedestrianisation could and should be used as a physical symbol in the transformation of the existing space to a viable and vibrant Banglatown. They pointed to the positive effects that pedestrianisation had had in Chinatown.

All respondents in the Hanbury Street area were in favour of pedestrianisation and stated clearly that they did not want their area to be omitted from any such experiment. Similarly, several respondents with businesses at the southern and northern ends of Brick Lane/Osborne Street were concerned that any pedestrianisation experiment should include the entire Osborne Street/Brick Lane roadway from Whitechapel to Bethnal Green Road.

Nearly a third of respondents (32%) were against pedestrianisation. They included owners of two outlets that specialised in takeaway/home delivery who felt that pedestrianisation would discourage customers coming into the area and thus have a major impact on their businesses. Two other reasons for opposition to pedestrianisation were, firstly, the effects on the cab trade (which respondents calculated employed 160–180 local people) and, secondly, that pedestrians moving in and out of the area could become easy targets for opportunistic street thieves/muggers from nearby estates. As one respondent said:

This area's got too many thieves, too many druggies. If you close the road, they'll be very happy. It'll make things very easy for them.

Banglatown vs. Brick Lane

The concept of Banglatown was developed as a conscious imitation of London's Chinatown by prominent members of the restaurant sector as a means of offsetting the recessionary pressures experienced by their businesses in the early 1990s. Since May 2002, Brick Lane, Hanbury Street and Osborne Street have been officially incorporated into a new Spitalfields and Banglatown ward.

Almost two-thirds of respondents (65%) thought that marketing the area as Banglatown was a good idea. However, only one respondent thought that the Banglatown brand was currently having much effect on

business in the area. The remaining positively-inclined respondents considered that Banglatown had enormous potential as a marketing tool/concept but that most customers were completely unaware of the Banglatown brand and its potential was, therefore, yet to be realised. In fact, some respondents were themselves confused about Banglatown's status. As one informant remarked:

Banglatown? Yeah, it's a very good idea. Most definitely. But I don't know much about it. To tell you the truth, I don't even know if it's official. It's not in the A-Z, is it?

Many informants had misgivings that marketing the area as Banglatown without the necessary infrastructure in place could have negative 'image' implications for the local Bangladeshi community. One respondent observed:

Banglatown is a good idea. But at the moment, it's a misuse of the name. You might as well call it 'Curry Town' because all you've got in this area are restaurants. That's not good for the community. It gives a distorted view.

Many respondents were very conscious of the comparisons that could be drawn between Banglatown and Chinatown. The latter was perceived as a concept and brand that should be emulated: it is a (largely) pedestrianised area with a wide variety of restaurants, shops and leisure sites bordered by Charing Cross Road, Leicester Square and Shaftesbury Avenue in the heart of the West End entertainment sector. In addition, respondents perceived that Chinatown:

- Attracts a large number of foreign and domestic tourists
- Is an international and prestigious brand
- Provides a rich social and cultural experience
- Has a perception of authenticity for visitors.

For many respondents, Banglatown was not comparable. As one informant noted:

Banglatown's nothing at all. It's just a name. Chinatown's been done properly. It's a thousand times better. You've got the telephone boxes, the pagoda and the gates. The street lighting's better too. All we've got is a gate that you can't see.

Respondents who positively perceived the Banglatown brand/concept wanted something more than the one-dimensionality currently evoked by the restaurant zone. When asked what they wanted for the area, respondents replied that there were three aspects:

Firstly, improvements in infrastructure:

- Pedestrianisation/widening the pavements (which would encourage the presence of women and children)
- Better street lighting

- Appropriate street furniture (comparable to Chinatown's)
- Creative cultural/artistic input (wall paintings, sculptures, etc.).

Secondly, improvements in shopping/leisure facilities:

- Art and craft shops
- Silk shops
- Furniture stores
- Jewellery shops/market
- Juice/snack bars
- Indian/Bangladeshi herbal medicine (comparable to outlets found in Chinatown).

Thirdly:

- Public cultural events highlighting Bangladeshi/South Asian dance, music, arts, fashion etc.
- Increased regularity of cultural and entertainment events (and not just festivals based on food/'curries').

It is worth noting, however, that only two respondents (6%) wanted Banglatown to jettison its links and associations with Brick Lane and focus exclusively on the Banglatown brand. Indeed, the vast majority of these respondents thought that the two concepts were complementary from a marketing point of view, adding rather than subtracting value (and not causing ambiguity and confusion) and comparable, in many ways, to the relationship between Gerrard Street and Chinatown in the West End. In short, these respondents favoured a 'Brick Lane, Banglatown' image rather than the singularity of a 'Banglatown' brand.

Only one respondent in the overall sample was indifferent to the choice of brand image. For him, the marketing problem was both more urgent and straightforward. 'I don't care what they do as long as the area's marketed properly,' he explained. 'We really need more people coming into the area.'

Nearly a third of respondents (30%) were against marketing the area as 'Banglatown', however, and expressed a clear preference for the area to focus exclusively on 'Brick Lane', which was perceived as a strong brand with deep and dynamic historical and contemporary associations. As one respondent said:

Changing the name won't work. Only people who don't know the history of the area want to change the name. You've got the Huguenots, the Jews, Jack the Ripper and the Krays. Why throw all that away?

Another explained:

I've worked in the North of England and everyone up there knows where Brick Lane is. You don't have to tell people where it is; they know where it is. Banglatown just confuses people.

Another commented:

Even the local Bangladeshis in this area don't say, 'We're going to Banglatown.' They say, 'We're going to Brick Lane.' Chinatown's been established for a long time. We're not another Chinatown.

Violence, Verbal and Racial Abuse and the Police

The majority of respondents (84%) reported that neither they nor their staff had experienced any form of violence, including verbal and/or racial abuse from customers in the last twelve months. Informants who had been in the catering trade for some years noted that, while racial abuse/violence had once been a problem in the area, it was no longer the case. 'Most of the people who come here are from the City,' explained one restaurateur. 'They're here to enjoy themselves, not to start fighting.'

However, 16% of respondents did report that they had experienced problems in the last twelve months, although only one informant claimed that there was a racial dimension to the incident. The most common problems reported were drunken customers becoming abusive to management and staff and/or those refusing to pay for their meals. One respondent stated that the windows of his restaurant had been broken after a dispute about non-payment escalated and spilled out on to the streets. Another often-mentioned problem involved the attempted use of stolen or fake credit cards by customers to pay for food and drink.

Significantly, a majority of respondents (60%) claimed that they had either witnessed or become involved in incidents on the street outside their premises in the last twelve months. No one claimed that these incidents were racially motivated. Typical problems noted included:

- Gang fights (between local Bangladeshi youths, particularly in the summer and at festival times)
- Youths shouting and throwing bottles (and other forms of anti-social behaviour)
- Muggings of customers (particularly mobile phone thefts)
- Drug-dealing (typically in side street locations)
- Prostitution (especially in side street locations such as Hanbury Street, Old Montague Street and Wentworth Street as well as Commercial Street).

The most serious problems according to many respondents were the gang fights and the general problem of youth disorder. As one respondent said:

Two months ago, a couple of white men got beaten up in front of the off-licence across the road. I don't know what started it, but the owner came out and told the boys to stop but they threatened to kill him. They said they'd do what they liked. I called the police. But then the youths threatened all the restaurants in this area. They said they'd break all of our windows if we opened the next day. We all opened as usual but they didn't come. There were a lot of police around for a few days after that.

Another commented:

There've been quite a lot of problems with gangs in the last twelve months. An Asian gang picked on one of our customers as he was leaving our restaurant. We had to go outside and push them away and calm them down. I was going to write to Oona King about it. It should be a priority for the police, the community and the council. But I don't think anyone takes it seriously.

Respondents were particularly worried about the effects that such street disturbances had on customer perceptions and that its monotonous regularity, particularly if it was reported in the media, would put people off coming into the area. (In fact, a street fight between two groups of Bangladeshi youths did occur in the period of study on the evening of February 28, 2002 at the northern end of Brick Lane, which then spilled into Shoreditch High Street. The event was widely reported the next day in the *Evening Standard* and radio stations *Capital FM*, *Heart* and *BBC London* to the consternation of several restaurateurs who were interviewed after the event.)

Respondents were also concerned about the effects of the Class 'A' drug trade carried out on nearby estates. Some respondents claimed that the rise in muggings and thefts from cars parked in the area (which often went unreported) was caused by youths requiring money to feed their heroin and crack cocaine habits. Respondents stated that such incidents rarely happened on Osborne Street and Brick Lane but did happen in side street locations like Hanbury Street, Quaker Street and Old Montague Street. (Concerns relating to opportunistic street robberies were also reported in interviews with respondents at the Vibe Bar and Coffee@Brick Lane.) Moreover, the drugs problem had been in part instrumental in the decision of some economically successful respondents to leave the area and move to more peaceful and crime-free suburban settings. One respondent stated:

I was brought up around here. It's my home. I know everyone and everyone knows me. But I don't want to live here anymore. The drugs situation pushed me out. I've got two kids and I don't

want them growing up here. I feel sorry for all those people living in council flats. It can't be good.

Over a quarter of respondents (27%) stated that they had phoned the police regarding incidents that had taken place inside or outside their premises in the last twelve months. Overall, respondents claimed that the police were often slow to react and that their response was inadequate. As one respondent said:

We had a group of teenagers and they had a meal but they tried to pay for it with a stolen credit card and it was refused. I called the police two or three times but they didn't turn up. They said they were very busy as it was a Friday night. So I had to let the boys go, there was nothing I could do. But I lost £200. The police said they would get someone to phone me the next day but no one did. It was four days later. I was very angry.

Another commented:

One day a customer had a meal and at the end said he'd left his wallet at home. I called the police. The man waited half an hour but then said he had to go. I couldn't stop him as I've got a business to run. An hour later the police rang me and asked if I still needed assistance. I just told them to get lost. It was terrible, disgusting. Now, I don't even bother to report these things.

These two informants stated that on average incidents of non-payment occurred in their restaurants five or six times a year. They claimed that the slow response/non-intervention by the police in these incidents betrayed 'racist' attitudes and behaviour. Respondents stated that they wanted:

- The Brick Lane police station to remain open in the evenings
- More visible policing, particularly regular foot patrols (and not just for a few days after a major incident had occurred in the area)
- Improved CCTV
- Faster response times.

A comparison with the practices and policies pursued in Chinatown is instructive here. The area has a dedicated 'Chinese Unit' (based at Charing Cross Police Station) comprised of six officers, which is the highest number of police officers for the population size of any community in the UK. Significantly, police patrols in Chinatown are more visible in the evening/night-time period – four restaurants are open 24 hours – and the Chinese Liaison Officer stated in his interview that because of the police presence, the area was one of the safest in London. Meetings between restaurateurs, the Chinese Liaison Officer and the police are held every three months when problems are discussed and innovative solutions are proposed. The Chinese Liaison Officer stated that he also had an important role training police officers (locally, but also nationally) on issues of racial and cultural awareness.

CITYSIDE, THE COUNCIL, STAFFING AND TRAINING

Cityside Regeneration

Respondents were asked whether and in which way they had benefited from Cityside Regeneration's restaurant support programme. Only two respondents (6%) stated that they had not benefited but added that this was because they owned new businesses and intended to take part in courses and events in the near future. Overall, there was a high level of awareness amongst respondents of the range of services involved in the restaurant support programme. Nearly all respondents were able to list the following services:

- Food hygiene courses
- Food safety courses
- Hazard analysis
- Grants for shop-front refurbishments
- Advertising/marketing (e.g. the Bangla Bites leaflet which provides a list and brief description of all the Indian/Bangladeshi restaurants and cafés in the area)
- Festivals (e.g. the International Curry Festival)
- Menu update subsidy.

Respondents were asked to assess the role and support given by Cityside Regeneration to their restaurant (and other restaurants in the area). The results were:

Very good	33%
Good	49%
Fair	15%
Poor	0%
Very poor	3%

Respondents were also questioned on how Cityside Regeneration and the restaurant support programme might be improved. Suggestions included:

- Better and more focused advertising/marketing
- General environmental improvements in the area
- Improved street lighting
- Help with modernising signs outside restaurant premises to complement shop front refurbishments.

Tower Hamlets Council

The vast majority of respondents (78%) expressed strong criticisms of the council; it was largely perceived as 'bureaucratic', 'remote' and 'ineffective'. Specific issues highlighted included:

- Poor business support (apart from Cityside Regeneration)
- Council staff not helpful/not interested in problem solving ('Don't return phone calls')
- Poor value for money given the amount paid in business rates
- Uneven and broken pavements in the area
- The number of road works and the time involved in finishing the job
- Poor street cleaning (compared to the City of London and Westminster)
- Poor rubbish/litter collection
- Lack of effective pest control
- Poor security for customers
- Inaction on prostitution
- Poor street lighting (including the Christmas/New Year festive lighting).

Some respondents claimed that the council had failed to adequately support the Banglatown initiative. They also complained about the general absence of effective consultation by the council with restaurateurs in the Brick Lane area, either when planning or implementing policy initiatives. These more qualitative (sometimes symbolic) assessments of the council can best be summarised thus:

- Lack of business experience (especially compared to Newham, Westminster, Birmingham, Bradford and Manchester)
- Absence of strategic thinking
- Lack of service provision
- No research/inability to identify and keep up with social and business change relevant to the catering sector.

Respondents were specifically asked to assess the role and support given by Tower Hamlets Council to their restaurant (and other restaurants in the area). The results were:

Very good	0%
Good	3%
Fair	18%
Poor	18%
Very poor	61%

It was evident that much of the dissatisfaction with Tower Hamlets Council indicated a widespread perception among restaurateurs that their problems and concerns were not being taken seriously. Sometimes these grievances were wide of the mark: for example, dissatisfaction about the amount paid in business rates was an inappropriate criticism as it is a tax collected by central and not local government. But other complaints relating to litter, rubbish collection, road works and out-of-order street lighting (including festive Christmas lighting) were relevant and indicate the absence of an effective mediating institution or agency linking the business community and the appropriate council departments.

A further comparison with arrangements followed in Chinatown is instructive here. The post of Chinese Liaison Officer is unique in the UK: it was established by Westminster Council's Education Director in 1990 in anticipation of the expected arrival of a large number of migrants around the time of the British handover of Hong Kong to China in 1997. Initially, the Chinese Liaison Officer was solely concerned with educational matters, but his role rapidly expanded so that today the officer is responsible for overseeing and co-ordinating the following policy/problem areas:

- Education
- Planning applications
- Lighting
- Street cleaning
- Refuse Collection
- Loading/unloading
- Parking
- Liaising with foreign embassies (Chinese, Taiwanese and Malaysian)
- Liaising with the Home Office (for work permits and student visas)
- Police liaison/training
- Public relations (with TV, radio and newspapers).

The Chinese Liaison Officer has rapid and immediate access to a wide variety of council officers including:

- The council leader
- Directors of council services
- Councillors
- Officers and members of the local restaurant organisation, the Chinatown Chinese Association.

The officer stated that ready access to relevant parties meant that problems (comparable to those found in Banglatown) could often be dealt with rapidly and efficiently. Furthermore, stakeholders knew

where to come to obtain relevant information and how and by whom issues were being dealt with. In effect, the officer has become an effective 'one-stop shop', bringing a high degree of transparency and accountability in dealings between the business community and local government services. The role of Chinese Liaison Officer provides an interesting model for the Brick Lane, Banglatown area.

Staffing

Just over a quarter of respondents (28%) reported that their businesses experienced staffing problems. Before being asked more specific questions, informants were asked to identify typical problems they experienced. The biggest difficulty, according to respondents, was a shortage of skilled professional staff, particularly chefs, managers and waiters. Respondents stated that the younger generations of Bangladeshis (both male and female) were not interested in working in the restaurant trade when there were other comparable employment opportunities (often with better pay and shorter working hours) available in the local area (Sainsbury, Tesco, Kwik Save and McDonald's) as well as in the retail sector in the City fringe and the West End. A number of respondents also reported that it was problematic to recruit young males from the local area because of the risk that they were heroin/crack cocaine users. According to respondents, employing drug users exposed their businesses to theft and fraud. For this reason, many preferred to employ older males in their late twenties and early thirties who were perceived to be more honest and trustworthy.

Two respondents owning smaller catering outlets said that they were finding it increasingly difficult to pay staff because of the low profitability of their enterprises.

Interestingly, businesses with a large number of workers drawn from the extended family reported few or no staffing difficulties.

Specific questions on staffing problems revealed that exactly a third of respondents (33%) claimed that there was a problem with staff retention especially amongst younger male Bangladeshis. A few respondents estimated that roughly half of staff was mobile with little loyalty to their existing employer, staying a few months before moving on.

Two respondents (6%) claimed that staff that they had trained and sent on courses had been poached by some of the City fringe restaurants that offered recruits higher pay and a shorter working week (as these restaurants typically closed at the weekend).

Nearly a quarter of respondents (24%) said that there was a significant problem with absenteeism that, it was claimed, had an especially drastic effect on smaller outlets, which found it difficult to organise cover at short notice.

A clear majority of respondents (62%) stated that their businesses would benefit if immigration laws were relaxed to enable staff to be brought over from Bangladesh (and elsewhere on the Indian sub-continent). A number of respondents reiterated that there was already an acute shortage of good chefs, especially those experienced in making 'authentic' Bangladeshi cuisine. Some respondents also noted that it was extremely difficult to convince the immigration authorities to let experienced catering personnel into the UK: in fact, one respondent observed that it was far easier to obtain work permits for Indian nationals because the size and nature of the tourist and hospitality industry in cities like Mumbai, Delhi and Jaipur meant that there was a pool of workers with professional 'paper' qualifications. This contrasted with many of their Bangladeshi counterparts who had, as he put it, 'a lot of experience but no bits of paper'.

A number of respondents in favour of a relaxation of immigration/work permit rules stated that any such system would be liable to abuse and would, therefore, need to be properly administered and scrutinised.

Just over a quarter of respondents (28%) were against any relaxation of immigration/work permit rules because they feared the consequences if foreign workers displaced existing employees.

Training

Nearly all respondents (94%) reported that they had sent staff on training courses (with the remaining two respondents (6%) maintaining that they intended to once their businesses were fully established). In fact, when asked whether they would like to send staff on further training courses, there was an enthusiastic response from a large majority with 90% of informants stating that they wanted more help and information. Overall, informants thought that previous courses held as part of the 'Restaurant Support Programme' had been very helpful but had not gone far enough and that a more systematic and continuous programme was needed in the area.

Respondents were then asked what type of service/course provision they would like provided. The following courses were suggested:

- Advanced food hygiene/food safety
- Food presentation
- Chef training/master classes (demonstrations by overseas chefs at festival times was not considered a sufficient input)
- Staff training on alcohol presentation/hygiene
- Restaurant management
- Computing
- Accounting
- Business seminars by leaders in the Indian/Bangladeshi restaurant trade

- Regular updates on new rules/policies affecting the catering sector
- Language/communication skills for managers/waiters (especially in dealing with foreign tourists)
- First Aid training.

Banglatown Restaurants Association

The vast majority of respondents (82%) were members of the Banglatown Restaurants Association with two informants (6%) intending to join in the near future. The remaining respondents (12%) considered that either the organisation was not relevant to their business interests or they did not have time to attend meetings.

Many respondents thought that the organisation was useful in keeping up to date – ‘It’s good, you know what’s going on’, explained one – providing information on customer flow, marketing and so on. But a significant minority complained that it was difficult for members to reach a consensus on policy and, in particular, that the association had conspicuously failed to stop street canvassing – ‘pulling customers’ – which many considered to be the most urgent problem confronting the restaurant sector in Banglatown. Some respondents maintained that the association had a lot of potential but this would only be realised if the organisation had a dedicated budget and office space that would encourage a more structured and professional approach towards effective marketing and promotion.

Respondents who were members were asked how often they attended meetings. The results were as follows:

Always	27%
Sometimes	61%
Hardly ever	6%
Never	6%

MARKETING, ADVERTISING, PROMOTION AND THE FUTURE

Marketing Categories

The majority of respondents reported that they marketed their restaurants and cafés as 'Bangladeshi' (62%), although sometimes this strategy was coupled with subsidiary brands and logos popular in the 1980s and 1990s like 'Tandoori' and 'Balti'.

A minority of respondents preferred to market their restaurants exclusively as 'Indian' (11%), which they considered to have a stronger brand image than any of the alternatives. A larger minority of respondents marketed their restaurants as both 'Bangladeshi' and 'Indian' (22%) in order to hedge their classificatory bets and, in their view, maximise their customer base. As one informant explained:

I mean we're the people who built up the restaurant trade in this country – not the Indians. I'd like to switch and just call my restaurant 'Bangladeshi' and not use 'Indian' but to be honest I'm frightened I'd lose trade if I did that.

Two outlets were being promoted outside the conventional categories relying on the over-arching 'Brick Lane' brand and trying to establish particular niches based on types of regionally distinctive South Asian food within it.

Advertising

Almost half of respondents (48%) said that they had used some form of advertising. Most of this number reported that advertising was carried out occasionally while a much smaller number (normally the bigger, more successful outlets) advertised on a weekly basis. Other respondents had tried advertising but either claimed that it did not work and had given up or thought that it was difficult to measure its effectiveness and were, therefore, reluctant to commit resources on a regular basis.

Restaurateurs targeting the white middle-class favoured advertising in the *Evening Standard*, *Time Out*, *What's On*, *City Guide*, and *Eastend Life*. Cafés (and some of the smaller, less successful restaurants trying to attract new customers) preferred to target the local (and nationally dispersed) Bangladeshi population through publications like *Joinomot*, *Surma*, *Sylket Dak* and *Euro Bangla*.

A number of respondents reported that they had entries in *Yellow Pages* (normally under 'Indian' restaurants) and one enterprising informant stated that he had taken advertising wall space in a number of health and fitness clubs in the area.

Market Research

Only two respondents (6%) claimed that they had ever conducted any form of market research in the area.

E-business

Less than a fifth of respondents (18%) said that they had access to a computer. Respondents who had this facility were enthusiastic about its potential and possibilities particularly if it was linked to the internet. They stressed that being technologically up to date was partly about projecting a modern and progressive image but it was also practically useful in terms of publicity, promotion and customer feedback.

Interviews also revealed that a significant number of respondents felt that they did not understand computers and internet technology.

Two respondents (6%) stated that, given their financial predicament, it was unrealistic to even think about acquiring expensive technology.

A minority of respondents (14%) did not consider that e-business was in any way relevant to their current business needs.

Just over a quarter of respondents (27%) reported that their businesses had an e-mail address and just over a third said that they had their own website (38%). Only a small minority of respondents (18%), however, claimed that customers could book on-line at their restaurants. Those who had this facility estimated that approximately 5–10% of their turnover was attributable to on-line bookings and that it was growing in popularity particularly with City clients. Respondents reported that it permitted customers to check menus and prices, order and even state their time of arrival, which was considered to be particularly relevant to the lunchtime trade when time was often at a premium.

No restaurant (or café) provided customers with internet facilities, which compares unfavourably to other businesses in the area like the Vibe Bar, Coffee@Brick Lane or, slightly further afield, the self-styled, pan-Asian 'gastrodome', Yummyums.net in Hoxton (which has 14 computers on site). This café-bar eclectically and successfully blends several key aspects of a (relatively) youthful, urban lifestyle – fast-food ('meals' and 'snacks'), alcohol, the internet, informality and a place to meet/make friends. Yummyums.net provides an interesting possible business model for new, innovative outlets in the Brick Lane/Banglatown area.

A large majority of respondents (81%) stated that they would like help in developing internet sites, e-mail and on-line booking facilities because, as one respondent put it: 'This is the future and if you don't join up, you will be left behind'. Two respondents (6%) – both graduates – claimed that they did not need help as they already had the necessary technological expertise.

Function Rooms

Nearly a third of businesses (30%) reported that their premises had a private function room or separate area for customers who wanted to hold private parties or business meetings. No one claimed that at the moment business derived from these spaces was a significant part of overall turnover although all agreed that they were very useful as overflow areas particularly when business was brisk, say, on Friday and Saturday nights. All informants stated that they wanted customers – particularly City clients – to use their private facilities but said that they did not know how practically to achieve their aims.

Only one respondent reported that members of the local Bangladeshi community used his premises for wedding receptions.

Smoking/No-Smoking

A small minority of respondents (12%) stated that they had a designated no-smoking area in their restaurants and cafés. No restaurant in the study operated as a smoke-free zone. Most respondents (88%) stated that either they had not considered a no-smoking policy or, if they had, their restaurants were too small to divide into smoking/non-smoking areas to make such a policy effective.

In-House Entertainment/Music

Only a small minority of businesses (11%) reported that they provided any form of in-house entertainment like live music or dancing. They stated that this was sometimes done as part of the festivals held in Banglatown but was not routine. Three restaurants (8%) had a large DVD screen or satellite projector providing access to the latest Bollywood blockbusters or *Zee TV* and *Bangla TV*.

All respondents reported that they played music in their restaurants and cafés. The categories of music routinely played were:

Indian Classical	73%
Bengali	49%
Indian Film	41%
Modern Western	19%
East/West Fusion	11%
Jazz	5%
Country and Western	3%

Disabled Access/Facilities

Just over a quarter of businesses (27%) had disabled access and toilet facilities. Some respondents who had invested significant amounts of capital in providing these facilities indicated that their restaurants and cafés ought to be highlighted in general promotional material about the area (e.g. *Bangla Bites*, internet sites).

Promotional Activity

When asked whether their businesses used any form of promotional activity (other than conventional advertising), nearly half of respondents (49%) reported that they did. The responses were:

Leaflet distribution	41%
Customer feedback forms	14%
Mailing	8%
PR	8%
Other (e.g. cuisine.net)	8%
TV/Radio	0%

All businesses that had received favourable reviews in food guides, newspapers and magazines used them in their window displays. Interviews revealed, however, that three respondents were unaware of either good or excellent reviews for their restaurants in *Time Out Eating and Drinking Guide 2002*, *Itchy London* and the *Rough Guide to London Restaurants 2002*. Observation also revealed that in a significant number of cases, promotional reviews displayed in windows were often poorly positioned and thus unlikely to catch the attention of prospective customers.

Business Research

Just over a quarter of respondents (27%) reported that they had visited restaurants outside the Brick Lane area for business research purposes in the last twelve months. Most of these visits were to Indian/Bangladeshi restaurants in London's West End, although sometimes trips were made further afield to restaurants in Birmingham and Essex.

The most popular destination was the Red Fort, visited by nearly a quarter of respondents (24%), followed by Soho Spice (18%), Mela (18%), Masala Zone (6%), Veeraswamy (6%), La Porte des Indes (6%), Chutney Mary (3%) and the Cinnamon Club (3%). Sometimes these visits seemed only to confirm that the Indian/Bangladeshi restaurant trade operated in qualitatively and quantitatively different segments – 'You pay £18 for a chicken tikka at the Red Fort whereas in Brick Lane you can get it for £3,' explained one bemused informant – but most thought that useful lessons in terms of customer service, food presentation, menu differentiation and so on could be learned from such visits. No respondents reported that they had visited either Tamarind or Zaika, two of London's Michelin-starred Indian restaurants.

Twelve per cent of respondents considered that visiting destination restaurants like those listed above was not worthwhile.

Refurbishment and Expansion

When asked whether they were planning to change or refurbish their restaurants and cafés in the next twelve months, just over a third of respondents (36%) stated that they intended to make improvements to their businesses. Fifteen per cent were waiting to begin improvements on their shop fronts, while the remainder (21%) intended to change the design and decor of the interior of their restaurants in order to catch up with the innovative styles (painted walls, wooden floors, new tables and chairs) pioneered and developed by some of the newer restaurants in the Brick Lane area. Respondents cautioned, however, that any refurbishment was dependent on an improvement in overall cash flow and would only be carried out if and when funds became available.

Twelve per cent of informants stated that they had plans to open other restaurants in the Brick Lane area in the near future. The vast majority of respondents (88%), however, did not consider such a move to be a wise or appropriate course of action given existing trading conditions. 'Opening another restaurant around here is an invitation to certain bankruptcy,' explained one informant. However, nearly a fifth of respondents (18%) reported that they had plans in the medium to long term to open restaurants outside the Brick Lane area – typically in white, middle-class areas in the South East (Surrey, Kent and Essex). Additionally, two respondents (6%) stated that they would like to open businesses in other areas of South Asian settlement like Southall and Newham.

Perspectives on the Future

Respondents were asked to assess their views on the prospects of the restaurant trade in Brick Lane/Banglatown. The results were:

Very optimistic	12%
Optimistic	48%
Pessimistic	15%
Very pessimistic	3%
Neither pessimistic nor optimistic	22%

Perhaps significantly, all the respondents who claimed to be very optimistic in outlook were the owners/partners of newly opened restaurants. Additionally, many of those who were optimistic stated that this was conditional on a number of factors changing in the near future:

- A quick end to the recession (business to return to pre-September 11th levels)
- An end to 'aggressive' street calling/canvassing
- An end to discounting
- Increased customer flow
- Improvements in the infrastructure of the area.

Problem Definition

Respondents were asked an open-ended question about the biggest problems that their businesses faced and to identify issues they had not previously mentioned. The results were:

- Street calling/canvassing 48%
- Too many restaurants/too much competition 42%
- Rubbish/litter on the streets 27%
- Absence of police patrols, especially in the evenings 24%
- Poor street lighting 24%
- Poor pavement repair 21%
- Lack of car parking 18%
- Prostitution 15%
- Drug dealing 15%
- Gang fights/youth disorder 15%
- Rent increases 15%
- Poor location 15%
- Bickering/lack of consensus between restaurant owners 15%
- Business rates 12%
- Continuous road repairs 9%
- Area has a 'poor' image 6%
- Homeless/vagrants on street outside premises 6%

Improvements

Finally, respondents were asked to suggest novel improvements that they considered might enhance business prospects in the area, and which they had not mentioned previously. The results were:

- Better marketing 45%
- Improved infrastructure/environment e.g. street furniture, Banglatown artefacts 24%
- Increase police foot patrols, especially in the evenings 24%
- Improved street cleaning 18%
- Provision of litter bins 15%
- Establishment of local Banglatown catering college to improve local (as well as national) standards 12%
- Improvements in night-life 12%
- Improved CCTV 9%

- Control of illegal/pirate mini-cabs 9%
- More festivals/events 9%
- Underground car park 6%
- Stop car parking in Brick Lane/Osborne Street as an alternative to pedestrianisation 6%
- Agreement on a price-floor for food i.e. restaurants can charge above but not below a minimum threshold 6%
- Installation of cash-point machines 6%
- Organise for the Euro/promote area as a Euro-friendly zone 3%
- Better youth facilities to cut down on gang fights/youth disorder 3%
- Common dumping area for rubbish rather than individual sites 3%
- On-street toilet facilities for visitors 3%
- End the practice of 'bring your own bottle' except for unlicensed restaurants 3%

CONCLUSIONS AND PROSPECTS

Conclusions

This research has examined the pattern of development and segmentation within the catering sector in the Brick Lane area. Some of the more significant findings of the study are summarised:

- In Tower Hamlets, changes in household structures and patterns of retail consumption amongst members of the Bangladeshi community, as well as the significant opportunities to be derived from the dramatic growth in London's new night-time economy since the late 1990s, has led to a major increase in the number of restaurants and cafés serving 'Indian' and Bangladeshi food in the Brick Lane area. In 2003 there were 46 catering outlets, which meant that Banglatown was home to the largest number of Indian/Bangladeshi restaurants anywhere in the UK.
- Bangladeshis owned the overwhelming majority (88%) of catering businesses in the Brick Lane area. Some 400 staff was in routine full- or part-time employment, although only four (1%) were female. This compared unfavourably with Chinatown where approximately 40% of the 2,500 employees were female.
- There has been a significant decline in the number of customers visiting the Brick Lane area at lunchtime during the working week. While some of this can be accounted for by an upsurge in coffee bars and sandwich outlets on the City fringe as well as the 'food court' at Spitalfields Market, it was also evident that restaurants in Banglatown have not kept pace with changes in fashion and style in the new daytime South Asian food market exploited by outlets such as Masala Zone, Mela and the fast expanding tiffinbites chain. These outlets were found to offer a wide and eclectic variety of competitively priced 'fast-casual' lunchtime options, often focused on 'healthy eating', to local office workers.
- The research also revealed a marked tendency for restaurants (but not cafés) in the Brick Lane area to experience long periods of inactivity followed by a surge in customer demand towards the end of the week (typically Thursdays, Fridays and Saturdays). This pattern was qualitatively different from that found in some outlets serving Indian food in the West End which reported a much more evenly balanced trade throughout the working week and at the weekend. These restaurants have achieved this primarily through subtle and intelligent marketing using creative and engaging concepts and narratives as well as promotional initiatives such as food festivals. This strategy has allowed these businesses to challenge the widely held perception amongst many consumers that 'going out for a curry' is a ritualistic and celebratory activity in which to indulge only at the end of the working week. Instead, these outlets have succeeded in making 'Indian' cuisine an everyday food choice for at least some middle-class Londoners.

- Only one outlet in the Brick Lane area – a café – offered breakfast facilities.
- The vast majority of businesses (94%) claimed that their turnover was either static or in decline to a greater or lesser extent, although a clear majority of respondents declared that their outlets were profitable. The turnover for all catering outlets taking part in the study (in 2002) was estimated to be £18 million annually.
- Consumers who used restaurants in the Brick Lane area were drawn from a well-educated middle-class group often living or working locally with a clear majority (70%) in the 25–34 age range. It should be noted that this age-set will decline in numbers in the near future with the 35–44 and 55–64 age-groups set to experience the largest growth. Increased competition between different areas of London to cater for the high-spending middle-class 25–34 age group is likely to become more pronounced. Additionally, the demand for restaurant services is expected to rise less quickly than has been the case in the last decade, although this will be offset, to some extent, by a strengthening of the under £20 per head food market which the catering sector in the Brick Lane area is well positioned to exploit.
- All mainstream restaurants reported that their clientele was predominantly white (81%) with smaller but growing numbers drawn from other ethnic groups. While some restaurants were observed to have a predominantly male clientele, many businesses had an equal number of male and female customers and a small number of outlets – particularly those newly refurbished offering novel food choices and good service – reported that the majority of customers were female signifying both the economic strength of female consumers and their demand for quality venues. Cafés serving authentic Bangladeshi/South Asian cuisine all reported a high proportion of male customers drawn from Bangladeshi and other South Asian groups.
- Eating out in Brick Lane, Banglatown was found to be very much an ‘expressive’ communal experience with a large number of customers coming from the City, often in mixed gender groups (and only a very small number of lone diners). There were also smaller numbers of tourists, local students and families using outlets.
- The relative decline in the number of regular customers using particular outlets can be explained, in part, by the increase in restaurants in Banglatown but may also reflect a perception amongst consumers (and, indeed, some restaurateurs) that the area was becoming more like the ‘Costa del Curry’ rather than achieving the status of the ‘Curry Capital’ of London or the UK. There is an increasing likelihood that discounting and street canvassing – more or less unknown, for example, in Chinatown – will attract ever more marginal (‘price sensitive’) customers while driving out the more affluent, regular clientele particularly to City fringe Indian/Bangladeshi restaurants or to other nearby ethnic food

spaces like the growing cluster of Vietnamese restaurants on Kingsland Road, Hackney.

- The majority of respondents reported that customers favoured 'traditional' dishes – chicken tikka masala, lamb pasanda etc. – but a significant number of restaurateurs reported that new dishes, particularly those based around chicken, fish and vegetarian options, were becoming more popular amongst young, affluent professionals keen to try 'authentic' and 'novel' food lines. Significantly, no restaurant in the Brick Lane area had explored the restricted menus (composed of eight or nine main courses) favoured by 'new wave' Indian/Bangladeshi outlets in London like Café Lazeez, Parsee and Ginger.
- The significance of the new night time economy was found to be clearly demonstrated by the positive impact of venues like the Vibe Bar and 93 Feet East and the large number of their customers who used nearby restaurants.
- Over two-thirds of restaurateurs (69%) were in favour of longer opening hours with some respondents noting that the bagel shops at the northern end of Brick Lane were open twenty-four hours and it was unfair to penalise the restaurant trade by comparison.
- The majority of restaurateurs (78%) considered that without a substantial increase in customer flow the existing catering market was saturated. However, a significant minority (22%) thought that Banglatown could still cope with more restaurants, although new outlets needed to be positioned at the higher end of the market.
- Almost two-thirds of respondents (65%) thought that the marketing of the area as 'Banglatown' was a good idea although other respondents thought 'Brick Lane' was a far stronger brand image for both locals and visitors because of its historical and contemporary associations.
- The vast majority of respondents (84%) stated that neither they nor their staff had experienced any form of violence, verbal or racial abuse from customers in the last year. A minority of restaurateurs (16%) did report a variety of problems, however, including abuse from drunken customers, refusal to pay for meals and the attempted use of fake or stolen credit cards. Additionally, a clear majority of respondents (60%) had either witnessed or become involved in incidents outside their premises (including gang fights, muggings etc.) in the last twelve months. There were also complaints from some respondents about the lack of policing in the area especially at night. It is evident that Brick Lane, Banglatown does not enjoy the level of policing resources available in the Chinatown area.
- Restaurateurs reported that their businesses were beginning to experience staff shortages (particularly chefs, managers and waiters). Respondents also reported problems with staff retention and absenteeism. A majority of respondents (62%) wanted

immigration rules relaxed to allow skilled foreign workers, especially those from Bangladesh (who, and unlike many of their Indian counterparts, often lack paper qualifications), easier entry to the UK.

- The majority of restaurateurs (62%) marketed their outlets as 'Bangladeshi'. Almost half (48%) used some form of advertising. However, only a small minority of respondents (6%) had ever conducted market research. Less than a fifth of respondents (18%) had access to a computer although just over a quarter (27%) had an e-mail address and just over a third (38%) had their own website. Only a small number of restaurants (18%) had on-line booking facilities. Nearly a half of respondents (48%) used some form of promotional activity but only a small minority of businesses (11%) provided any form of in-house entertainment other than playing music cassettes and CDs.
- No restaurant (or café) provided customers with internet facilities and only a small number of restaurants (12%) had designated no-smoking areas, while no outlet operated as a smoke-free zone.
- Exactly half of respondents (50%) were optimistic about the future prospects of the restaurant trade in Brick Lane, Banglatown (although 18% were pessimistic with 32% claiming to be neither optimistic nor pessimistic).

Prospects

- Miller (2001: 118–119), in an illuminating ethnographic study of working and middle class shoppers (and shops) in North London, observes that the urban economy in this part of the capital has probably become more cosmopolitan in terms of food styles and fashions than anywhere else in the UK. Additionally, he argues that food choices are typically saturated with class and status distinctions, and notes, in particular, that because ‘curry’ – once a decidedly exotic dish for Londoners (although it remains so for the vast majority of consumers in much of the rest of the country) – has now become an inclusive and mainstream item of consumption in the capital, significant numbers of the metropolitan middle-class have begun to explore regional Indian cuisines in an attempt to maintain their social distance from consumers in lower socio-economic groups. (Indeed, it is noteworthy, for example, that this process of regional segmentation within the ‘Indian’ food sector has already been incorporated in the high added value chilled food lines on offer at upmarket retailers like Marks & Spencer and Waitrose.) Further, the current research has discovered that the sector dynamics involved in social distinction and difference have already moved on since Miller made his analysis. For example, Ram’s restaurant, which opened in 2002 (located in Kenton Road, Harrow, and with plans to open a second branch in the Swiss Cottage area), has been the subject of much mainstream media attention and has been short listed for several food awards including the prestigious Tio Pepe Carlton London Restaurant Awards and the *Evening Standard* London Tonight Awards, and was winner of the *Time Out* Vegetarian Restaurant of the Year in 2002. It specialises in Surti-style vegetarian food from the Surat district of Gujarat. Another popular destination restaurant, Rasa Travancore, part of the Rasa group, which opened in 2001 (located in Stoke Newington Church Street, N16) focuses almost exclusively on the cuisine of the Syrian-Christian community of the Kerala region in South India. This kind of micro-segmentation within the Indian food market in London is likely to increase greatly over the next few years.

The overall lesson for restaurants in the Brick Lane area is that some level of internal market differentiation needs to occur in the near future otherwise the catering sector will be perceived by middle-class Londoners – its current core constituency – as decidedly old-fashioned and behind the times and will be in danger, therefore, of losing ever more ground either to existing (and new) City fringe outlets offering Indian food or to other nearby locations which provide novel forms of ethnic cuisine such as the fast-expanding cluster of Vietnamese restaurants on Kingsland Road, Hackney. Thus, while a majority of catering outlets in the Brick Lane area will probably continue to offer customers a ‘traditional’ menu, some restaurateurs might be wise to consider exploring the possibilities and opportunities for new types of businesses based around a consciously defined exclusivity that will appeal to the metropolitan middle class:

- Regional/sub-regional food (Gujarat, Pakistan/ Punjab, Nepal, Kerala, Kashmir, Goa, Andhra Pradesh, Mangalore, Sylhet/Chittagong/Comilla etc.)
- Indo-European fusion food (like Café Lazeez)
- Fish/vegetarian foods (combining the best of Bangladesh and Billingsgate)
- Smaller, restricted and ever-changing menus.

Additionally, restaurateurs should take note of the type of segmentation that has occurred in recent years in Chinatown, especially at the budget end of the market, and consider opening new and innovative outlets focused on:

- ‘Eat as much as you like’ all-day buffet
- Simple niche foods – biryani, thali and the ‘staff curry’ (i.e. the food eaten by restaurant workers)

Some restaurateurs might also wish to focus on the changing dynamics of the new (and overlapping) daytime and night-time economies and the emergence of the ‘fast-casual’ market, and offer breakfast, lunchtime and evening fast food options, providing snacks as well as meals.

- The overwhelming majority of successful ‘new wave’ creative industries (design, media and music etc.), retail outlets (clothes, shoes, art, furniture, jewellery, etc.) and leisure sites (Café 1001, Coffee@Brick lane, 93 Feet East, the Vibe Bar etc.) which now dominate the Brick Lane area display the following set of cultural values in their business activities:
 - Open
 - Vibrant/cutting edge
 - Egalitarian (especially as regards gender)
 - Fluid/emergent
 - Syncretistic/heterogeneous
 - Casual/informal
 - Multi-cultural/polyethnic.

The Indian/Bangladeshi restaurant sector in the Brick Lane area has largely developed independently of the style changes generated by these ‘new wave’ businesses (although not of the economic consequences of their success). But overall, this tends to work against the restaurant sector, forcing it to remain within a relatively low added value niche. Some restaurateurs, therefore, might wish to consciously absorb some of these key values in order to create an increased level of synergy between the catering sector and other businesses and leisure sites within the area. Others, however, might wish to explore the cultural values associated with less informal and casual marketing strategies, preferring instead to reposition themselves as mid-market, destination outlets comparable to Indian restaurants on the City fringe and in the West

End. This would minimally necessitate an examination of the architectural and design styles as well as the working practices employed in the restaurant sector, especially the lack of female workers. But by redefining the experience of eating out in Brick Lane in a variety of ways, the restaurant sector could become increasingly profitable, employ more people, and thus make a significant and valuable contribution to the development of London's advanced service sector.

- It is evident that the lack of market intelligence and analysis has been a major shortcoming in the development of the Indian/Bangladeshi restaurant sector in the Brick Lane area. It would seem sensible that the Banglatown Restaurants Association (and other interested parties like the London Development Agency) should establish ongoing monitoring of food and design changes in the South Asian (and other) food market(s) in the London area in order to keep restaurateurs informed of significant changes and shifts in the new daytime and night-time economies.
- It is very questionable whether the advertising strategies currently pursued by some individual restaurateurs in publications such as the *Evening Standard*, *Time Out* and *Cityguide* have any real impact on consumer behaviour. It would be far better to build the Brick Lane (Banglatown) brand around publicity and use advertising as a secondary option if and when appropriate (perhaps organised collectively by the Banglatown Restaurants Association or other agencies). Publicity could be sought and focused thematically around a number of possibilities:
 - Festivals (Eid, Divali, Halloween, Bonfire Night, the London Marathon, St George's Day etc.)
 - Entertainment, musical events, poetry readings, book launches, lectures etc.
 - New restaurant outlets/styles
 - Authentic and novel/innovative food lines
 - The use of Fair trade products (and other 'cause related marketing' initiatives)
 - Changes in opening hours, e.g. breakfast facilities and later openings
 - No-smoking outlets
 - The opening of a catering college (and the recruitment of female trainees)
 - Promoting the area as a Euro-friendly zone
 - The launch of a 'Brick Lane Cookbook' (using selected recipes from some/all of the restaurants in the area) which could capitalise on the outstanding success of 'Brick Lane', the novel by Monica Ali

- The research has identified a major concern amongst restaurateurs concerning shortages in the number of professionally trained chefs, managers and waiters available for work in the area. This problem is likely to grow as increasing numbers of young Bangladeshis choose to enter employment sectors other than the catering trade, and is compounded by the inability of the industry to attract female workers. In order to remedy this situation, it is recommended that a local catering college should be established. Training could involve both in-house and time-release short course elements, providing students with a broad-based catering experience (and professional qualification) focusing not only on South Asian but also other relevant forms of contemporary cuisine. It is envisaged that a pilot project, which could utilise existing restaurant facilities in the area as well as those available in local colleges, would be cost-effective. If successful, the project could lay the foundations for a centre of catering excellence-setting standards for local, regional and national training and development.

Chef training (for both existing and trainee chefs) should focus on:

- Authentic and novel food lines
- Methods of cooking (low fat, healthy eating etc.)
- Timing
- Food presentation
- Advanced hygiene/hazard analysis.

Waiters could be given information on:

- Customer service
- Silver service
- Food presentation
- Alcohol/bar presentation
- Language training (English, French and German)
- First-aid training.

The catering college could also provide lectures and seminars for restaurant owners and managers in areas of:

- Marketing/advertising
- Finance/accounting
- E-commerce
- Trend identification and brand differentiation.

Training could also be actively promoted to young Bangladeshi (and other South Asian) women (perhaps with a specific number of allocated places in liaison with local schools and sixth-form colleges in Tower Hamlets). In order to create a sense of plausibility about Bangladeshi females working in the catering sector, it is also recommended that, in the short term, the Banglatown Restaurants Association (and individual restaurateurs) take steps to recruit foreign female 'gap year' students through contacts with other businesses in the area (the Vibe Bar, Café 1001, Coffee@Brick Lane etc.) as well as advertising in the jobs sections of publications like *TNT*, *Ms London* successfully used for this purpose by several West End outlets.

- Finally, it is worth noting that London now plays host to a significant number of premium-level destination Indian restaurants. Some of these, such as the Bombay Brasserie and Red Fort, were started in the 1980s, but the vast majority, like Benares, Chor Bizarre, Chutney Mary, the Cinnamon Club, La Porte des Indes, Mint Leaf, Quilon, Tamarind and Zaika, have opened in the last few years. Some restaurants, like Benares, Tamarind and Zaika have already achieved Michelin stars for the standard of their food and service, while others like the Cinnamon Club housed in the Old Westminster Library in Great Smith Street, Westminster and a favourite haunt of parliamentarians, lobbyists and media folk, are expected to achieve that status in the near future. These premium-level restaurants are tracked by a steadily growing number of mid-market destination outlets – Bengal Trader, Bombay Palace, Café Lazeez, Café Spice Namaste, Haandi, Kasturi, Mela, the Painted Heron, Parsee, Ram's, Rasa, Rasa W1, Rasa Sumadra, Rasa Travancore, Sarkhel's, Soho Spice, Star of India, Vama and Veeraswamy – which offer a continually improving level of differentiated cuisine and service unimaginable only a decade ago. There is also a rapidly emerging sector focused on fast food (as well as takeaway and office delivery) exemplified by outlets like Chowki, Masala Zone, Rasa Express and tiffinbites. But it is significant that very few of these innovative premium, mid-level and fast food Indian restaurants in the London area – apart from Bengal Trader, the Cinnamon Club, Kasturi and the Red Fort – have any kind of Bangladeshi representation in terms of either staff, management or ownership. Indeed, many of these outlets are either owned by large hotel groups – for example, the Bombay Brasserie and Quilon are part of Taj Hotels, while La Porte des Indes is owned by the Blue Elephant chain – or by wealthy Indian businessmen and women (sometimes with the backing of European venture capitalists). Interestingly, the chefs, managers and service staff employed in these businesses are almost exclusively recruited from the big hotel chains in India – the Oberoi, Sheraton and Taj groups – because of their culinary, presentational and customer service skills. It is inconceivable, however, that this new wave of Indian restaurants in London either could or would have developed without the supporting cultural infrastructure – the sheer sweat and hard work – provided by several generations of Bangladeshi migrants and their children. And this is the case even for the capital's premium level

Indian restaurants. As Iqbal Wahhab (founder and co-owner of the Cinnamon Club) rightly observes:

. . . we should all be thankful to the endeavours of this community, who suffered the constant verbal abuse from drunken customers that came to be the caricature of the curry house experience and who rose above it to make their dishes the country's most sought after. Without the groundwork the Bangladeshi community put in to popularising the cuisine, restaurants like The Cinnamon Club would probably not exist. (2003: 21–22)

But the crucial question is whether restaurateurs within the Bangladeshi community in the Brick Lane area (and also elsewhere) can begin to compete with these new businesses because they are surely indicators of where the future direction of a significant segment of the Indian restaurant sector in London (and in the rest of the UK) lies. The alternative – to be caught in a relatively low added value niche from which there is little chance of escape, particularly as competitive and cost pressures relentlessly increase – is unlikely to remain a viable option in the medium or long term.

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BIOGRAPHY

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