



Brazilian Gastronomic Capital in the Context of the Covid-19 Pandemic: Perspectives for the Upscale Contemporary Restaurant Segment in the City of São Paulo (SP)

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ABSTRACT: The SARS-CoV-2 virus (coronavirus) is a pathogenic agent that affects the respiratory and gastrointestinal tract responsible for the pandemic that started in December 2019 in China. In the city of São Paulo, the Municipal Decree 59.285/2020 suspended face-to-face service to the public in different establishments, directly affecting the Food Service. The reopening of the commerce, announced on June 10, 2020 by Municipal Ordinance No. 625/2020, originated from Decree 59.473/2020, established challenges: requirement of security protocols and service limitations. The city is recognized as the gastronomic capital of Brazil for the volume of restaurants and gastronomic diversity. As an important part of the local economy, the restrictions generated severe impacts in the sector. This article aims to identify and analyze, through qualitative exploratory research, perceived changes and perspectives for the segment of upscale contemporary restaurants in the city of São Paulo. A literature review, documentary research, and consultations with chefs and Experts in the area were carried out using a semi-structured script. The sample was by convenience and counted on 8 respondents. The main results were: a drop in sales with layoffs and closing of businesses; adjustments in menus for new systems (delivery and take away); challenges in the process of recovery involving financial maintenance of the business and regaining customers.

Keywords: Food and beverage management;
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INTRODUCTION

A new virus called SARS-CoV-2 (coronavirus) is responsible for COVID-19 disease whose outbreak gained prominence in December 2019 in China. It is a pathogen that is still poorly known clinically with respect to transmission, incubation, reproduction cycle, survival rate, and response to antivirals (Fong et al., 2020).

Coronavirus is transmitted by touch and saliva particles from infected individuals, reaching the respiratory and gastrointestinal tracts, and can lead to death, although asymptomatic infected individuals exist (Fong et al., 2020). The disease has become a pandemic and Brazil had its first confirmed case in the municipality of São Paulo on February 26, 2020 (Ministério Da Saúde, 2020). As of August 28, the period when data collection for this article was completed, the country counted 3,761,391 confirmed cases and 118,649 deaths (Coronavirus Brazil, 2020).

The fast progression of the disease has led to several preventive measures. On March 18, 2020, Municipal Decree No. 59.285 determined the suspension of face-to-face service to the public in commercial wholesalers, retailers, peddlers and service providers. Such establishments could operate only by apps, internet and telephone, maintaining the delivery of goods by delivery (Cidade De São Paulo, 2020). The reopening of commerce was announced on June 10, 2020 by Municipal Ordinance No. 625/2020, arising from Decree 59.473/2020, by determining a set of restrictive measures.

These constraints directly impacted the Food Service segment, which comprises all types of establishments producing meals outside the home, such as: industrial kitchens, fast food chains, catering companies, bars, restaurants, ice cream parlors, bakeries and street vendors; also covering meals made at workplaces, leisure, hotels, schools and hospitals, in addition to meals purchased outside, but consumed at home (ABRASEL, 2020a). By bringing together ready-to-eat food production operations and meal service, the sector requires efforts also in the provision of services and direct service to final consumers (Johns & Pine, 2002).

Bearing the title of Gastronomic Capital since 1997, the city of São Paulo is recognized not only for the diversity of its gastronomy (resulting from the influence of different ethnicities), but also for the volume of gastronomic establishments, notably restaurants. These establishments serve approximately 12,252,023 residents (IBGE, 2019) and compose, with other attractions, a tourist offer based mainly on business and event tourism, helping to create the image of a dynamic, eclectic, and multicultural city that brings together tradition and innovation (Gimenes-Minasse, 2017).

It is observed that restaurants and similars are, prominently, places of sociability and leisure, being that the

dining experience is composed of objective (food, drink, lounge comfort) and subjective elements (status related to the establishment, ambiance, service) (Gimenes, Brea & Gândara, 2012). In this context, authors such as Warde and Martens (2000) and Akel et al. (2012) argue that the general reasons for eating out are multiple and include trying different foods than usual, taking a break from cooking, relaxing, socializing or celebrating. Given that interaction with other customers and the environment itself are relevant in these spaces, these establishments offer, in addition to food and drink, entertainment and opportunities for contact with different interfaces of São Paulo culture.

At the closing moment of the analysis of the data collected, there were still no data on the impacts of the pandemic on the sector, although institutions such as ABRESL (Brazilian Association of Entities and Gastronomy, Accommodation, and Tourism Companies) and ABRASEL (Brazilian Association of Bars and Restaurants) had already expressed great concern, in view of the losses that were being caused, not only with the operating restrictions, but also with the reduction of income for many customers, due to the economic instability that affected different sectors of the national and international economy.

In this pandemic context, the situation of the establishments belonging to the upscale niche is worrisome: they are small businesses, not belonging to chains, with a high number of employees (due to the personalized service in the kitchen and lounge) and with little working capital. This niche specializes in original and individualized services, dedicated to creating a dining experience, working not only with outstanding quality dishes (flavor, texture, ingredients and presentation) but also developing elements related to the creation of the ambiance (Muller & Woods, 1994), considering that, as Rodríguez-López et al. (2020) point out, for the construction of a memorable meal the quality of the ambiance and service of a restaurant are as relevant as the food and drink served. Even though they are not accessible to a large part of the population due to the costs involved, they are responsible for launching gastronomic trends. However, by suspending their activi-

1 In 1997, during the 10th edition of CIHAT - International Congress of Gastronomy, Hospitality and Tourism, an annual event promoted by ABRESL, gathering associated businessmen from all regions of Brazil, companies in the segment, and authorities in the area, the Honorable Committee of the Nations awarded the title "World Gastronomy Capital" to the city of São Paulo (ABRESL, 2021).

2 According to the Michelin Guide (2019), in pre-pandemic data, it was the second largest city in number of restaurants in the world, behind only New York. According to the official City of São Paulo website, the number of formal food service establishments in the year 2019 was 23,092 establishments, equivalent to 7.7% of local commercial activity and an average annual turnover of R\$31.9 billion (City of São Paulo, 2019).

ties, these enterprises were limited to the delivery and take away systems, service modalities that, despite having grown on average 70% in the period (ABRASEL, 2020i), impose a series of limitations in relation to the original proposals of these restaurants.

The effects of the pandemic in Tourism have already been the object of analysis of foreign researchers such as Gössling et al. (2020); Niewiandowski (2020); Wen et al. (2020); and Brazilians such as Beni (2020); Coelho and Mayer (2020); Amorim et al. (2020); and Mecca and Gedoz (2020), who developed approaches foreseeing environmental impacts on service management, tourist behavior and destination repositioning. However, literature surveys conducted between June and July 2020 in the Scopus, Spell, and Scielo databases showed that discussions of pandemic impacts on the gastronomy sector were still incipient.

A survey using the terms "Covid-19 and Food Tourism" and "Covid-19 and Gastronomy Tourism" in the Scopus, Spell and Scielo databases did not identify any related scholarly articles. In the Scopus database, the terms "Covid-19 and Gastronomy" resulted in one article on human consumption of wild animals (Volpato et al., 2020) and the terms "Covid-19 and Restaurants" in 30 articles, all dealing with social distancing policies and the main restrictions imposed on enterprises, mentioning restaurants among other establishments, but without addressing the specifics of the sector. The same terms, when applied to Scielo and Spell, did not generate results.

Given this brief overview, this article aims to identify and analyze, in an exploratory qualitative research, the perceived changes and prospects for the segment of upscale contemporary restaurants in the city of São Paulo (SP). This segment was chosen for having as a brand the offer of dining experience through creative dishes with careful presentation, accompanied by decoration, tableware, and personalized service, elements of ambiance that cannot be easily reproduced in delivery and take away.

CONTEMPORARY UPSCALE RESTAURANTS AND THE GASTRONOMIC MARKET IN SÃO PAULO

There is no precise data about the São Paulo food service sector, but according to ABRASEL (Brazilian Association of Bars and Restaurants) (2020), it is the second city in the world in number and diversity of restaurants and similar, having, before the beginning of the pandemic, about 20 thousand restaurants and 30 thousand bars, offering 70 types of cuisine (ABRASEL, 2020a).

The international recognition of local gastronomy is perceived by the presence in The World's 50 Best Restaurants award: in the 2019 edition (2020 was can-

celled), of the 5 Brazilian restaurants nominated, 3 are in the city of São Paulo; and also by the majority presence in the Michelin Brazil Guide: in the latest edition (2019), of the 18 restaurants that received stars, 11 are in the city (2 two stars, 9 one star). The popularity achieved by chefs such as Alex Atala (D.O.M.; Dalva e Dito; Bio), Érick Jacquin (Président), Emmanuel Bassoleil (Unique; Skye), Paola Carossella (Arturito; Las Chicas), Rodrigo Oliveira (Mocotó Balaio IMS) also highlights the city, which has held the title of Latin American Capital of Gastronomic Culture since 2018.

Contemporary restaurants are based on the creative process of the chefs, involving the reconstruction and presentation of food in novel versions (Benemann & Menasche, 2017), which seek to mobilize the senses of the diner by the harmony between colors, aromas, textures, temperatures, and flavors of food (Teixeira et al., 2013), also working with elements of ambiance, transforming the meal into a memorable experience. Many of these enterprises belong to the upscale category (high level or luxury), restaurants that offer original and individualized services, exclusive concept, authorial tasting menu, quality wine list and differentiated meal experience (Muller & Woods, 1994).

Upscale or gastronomic restaurants have a reduced structure and operations are planned to serve less than 100 people in elegant surroundings. The kitchen and lounge brigades are trained to execute an exquisite service, with a renowned chef, specialized sommelier, individualized service and luxurious ambiance, operating at high prices. They have low turnover (generally 1 diner per seat), due to the long meal time, especially when the menu is tasting, with a sequence of several dishes served in small portions, which depending on the complexity can demand from one to five hours of meal (Fonseca, 2018). They are usually located in capitals or large cities with international notoriety and are responsible for establishing a large part of the gastronomic trends, having as a brand the sale of exclusive experiences from authorial tasting menus (Oliveira & Cé, 2012).

Like every company, these ventures face challenges. Entrepreneurial management is defined by Hamel and Prahalad (1995) as the ability of a company to cultivate competencies, observe the emerging competitive reality, and anticipate market changes. For Maricato (2010), restaurant management consists in the ability to obtain efficiency in its various areas and ensure a good relationship between price and quality offered to customers. Therefore, it is fundamental the rational use of resources to achieve greater and better results with lower costs, emphasizing the importance of the correct administration of stock, input orders, and equipment purchases (Damiani et al., 2017). However, these structural tasks are restricted to the administrative backstage and are invisible to customers, who establish contact with the restaurant through the kitchen and lounge service.

For Salazar et al. (2016, 2017), upscale restaurants work with 'rare strategic resources', capable of distinguishing them from current or potential competitors, with emphasis on the figure of the chef. These resources constitute a dynamic capability that reduces possibilities of replication of their competencies by competitors (Pelaez et al., 2009). Upscale restaurants can be defined from three dimensions: functionalism (which represents the idea that luxury goods should fulfill the function of solving consumers' problems); experiential symbolism (which represents the idea that luxury goods provide sensory pleasure); and symbolic interaction (which represents the idea that luxury goods should satisfy consumers' needs). An upscale restaurant is therefore a set of personalized and unique elements (menu, ambiance, and service) (Lee & Hwang, 2011).

For Albuquerque Filho et al. (2020), competitiveness consists of how a company distinguishes itself from its competitors within the market, using mechanisms such as: product, price, perceived quality and degree of differentiation of its services, with cost efficiency. Still for these authors, competitiveness is measured by the company's ability to remain in more competitive and globalized markets, adopting strategies that provide greater development and satisfactory results from the adoption of practices accepted and valued in the environment in which they operate. In this process, Porter's five competitive forces can influence: threats from new entrants, threat of substitute products, bargaining power of suppliers, bargaining power of buyers, and level of rivalry between competitors (Almeida & Pinho, 2020).

'New entrants threat' corresponds to the degree of market competitiveness in the competition for customers; 'threat of substitute products' to the increase of competition in substitute formats of the same product; 'bargaining power of suppliers' to the imposition of prices by them; 'bargaining power of buyers' to the ability to reduce price and increase service offered and, 'level of rivalry between competitors', corresponds to the dispute for the dominant role in the market (Almeida & Pinho, 2020). Bouzada and Barbosa (2009) observe that Porter's five forces are generic and each area emphasizes one of them; for Vargas et al. (2013), among restaurants, the most expressive force is the 'level of rivalry between competitors' in the market.

Porter (1992) also describes three generic strategies in the search for competitive advantage: low cost, differentiation, and focus. Low cost' corresponds to the company's ability to keep costs lower than the competition; 'differentiation' to the customization of the dimensions evaluated by clients that allows it to offer a product or service at a higher price; 'focus' to the market segment - broad or specific - chosen to offer products or services. For Porter (1992), the adoption of one of these strategies implies in offering unique value not

easily imitated by competitors, providing dominant positioning in the market of operation. In the upscale segment, it is traditionally difficult to work the low cost strategy, being more used the differentiation (by creating dining experiences) and focus (on a specific segment) strategies. In this process, a restaurant develops unique resources and capabilities to generate competitive advantage (Tondolo & Bitencourt, 2014), placing itself ahead of the market and reducing possibilities of replication of its competencies by competitors (Pelaez et al., 2009).

Municipal Decree No. 59,285 forced the entire food service sector to adapt quickly. ABRASEL released several materials addressing the effects of the pandemic, such as the renegotiation of rents (ABRASEL, 2020b); the temporary revision of labor laws (ABRASEL SC, 2020); the government aid made possible by MP 936 (ABRASEL, 2020c; ABRASEL, 2020d) and precautions indicated by ANVISA for delivery and take away (ABRASEL, 2020e, ABRASEL 2020f, GALUNION, ABRASEL & SEBRAE, 2020). Table 1 summarizes recommendations for delivery and take-away operations:

Table 1 - Hygienic-sanitary recommendations for delivery

Packages	Use of cool boxes and refrigeration by gel bags.
Vehicles or Withdrawal Zones	Frequent hygiene and disinfection with sanitizing gel (70% alcohol): of backpacks or transport boxes, shift, handlebars or steering wheels, credit card machines (delivery); of counters, doorknobs, credit card machines and other surfaces (take-away).
Deliverers	Use of PPE (personal protective equipment): surgical masks or face shields, gloves, and closed shoes; frequent hygiene and disinfection of the hands with sanitizing gel (70% alcohol); physical distancing from the customer at the time of delivery; demarcation of the take away zones with a 1-meter distance between customers (take away).

Source: ABRASEL (2020d, 2020e); GALUNION, ABRASEL & SEBRAE (2020).

Municipal Ordinance No. 625/2020, arising from Decree 59.473/2020, established the resumption of commercial activities such as restaurants and the like. In this opportunity, the Sanitary Surveillance determined mandatory preventive measures for bars and restaurants, leaving the subprefectures in charge of inspecting compliance with the Decree and ensuring the suspension of illegal trade (Diário Oficial, 2020). Based on these determinations, ABRASEL published practical guides to avoid contagion (2020f, 2020g) and a general planning booklet for the resumption of activities (2020h). SEBRAE NACIONAL started to offer, through its regional offices, "Express Consultancy for the Re-

start", besides making available videos and courses on its website (SEBRAE, 2020a). This entity has also produced the booklet "Orientações para a resumada segura de atividades de bares, snack bars and restaurants" (SEBRAE, 2020b) with guidelines on disease, the performance of employees and the adaptation of the physical space; as well as a checklist for the safe resumption of activities (2020c). ABRASEL and SEBRAE (2020), together, also prepared the "Manual of safe conduct for services of bars and restaurants in the prevention of COVID 19". The main recommendations are summarized in table 2:

Table 2 - General Guidelines for the retaking of Bars and Restaurants

Area	Recommendations
Hygiene and Cleaning	Hygiene and Cleaning Alcohol gel available at the entrance, exit and inside the establishment; Hand wash basins with liquid soap, alcohol gel and paper towels; Sanitation signs; Disinfection of objects, surfaces and equipment every 3 hours at least; Use of masks.
Physical distancing	Scheduling of workstations; Limiting the number of employees per workstation; Workstation spacing.
Collaborators	Testing for Covid-19; Temperature Measurement; Use of the service entrance; Provision of individual space for storage of personal belongings; Use of masks, hair nets, disposable gloves, clean coveralls and non-slip shoes; Support for employees who do not have someone to take care of their incapacitated dependents during the period when daycare centers and schools are closed.
Lounge	Alternative hours of operation; Reduced work hours; Scheduling system (reservations); Temperature measurement of customers; 1.5m distance between chairs and 2m between tables; 1m distance markings in the entrance or payment queue; Natural or air-conditioned ventilation (as long as it does not fall directly on any table, individual or food); Protected dishes and napkins; Removal of condiments, decorations, and tablecloths; Digital menus.

Source: the authors (2020) based on literature review
Recommendations indicated in tables 1 and 2 required adaptations from different sectors of the establishments and, as far as upscale restaurants are concerned, the development of new differentiation and focus strategies in search of obtaining and maintaining competitive advantage.

METHODOLOGICAL PROCEDURES

This research was exploratory in nature, seeking to develop a theme that has not yet been explored (Raupp & Beuren, 2003). It was carried out based on: (1) literature review, (2) consultation of secondary sources (due to the absence of published academic studies) and (3) semi-structured interviews that allow the interviewee to choose the perspective under which their answers

would be oriented (GIL, 2008), carried out with chefs and experts. The chefs were consulted because, as Salazar et al. (2016, 2017) point out, this professional is the most important strategic resource in gastronomic restaurants; the experts for being people whose professional trajectory allows a consistent reading of the studied reality.

A semi-structured script was developed to conduct the interviews with the chefs and experts, with questions adapted according to the competencies of each of the groups, described in chart 3:

The sample of respondents (experts and chefs) was

qualitative, chosen by convenience (willingness to participate in the research) and composed of 8 respondents characterized in table 4:

Due to the social distance, the interviews were conducted and recorded by Skype and anonymity was guaranteed so that the interviewee was free to express opinions and perceptions. A content analysis was performed based on the principles of Bardin (2011), having as analytical categories defined a priori: impacts, changes, trends, competitiveness and challenges.

RESULTS E DISCUSSION

Impacts and Changes

For the interviewees, the consequences of the pandemic were drastic in the food sector, since it meant

Chart 3 - Interview Script

Questions	Experts	Chefs
1	In your opinion, what were the main impacts of the pandemic on the bars and restaurants sector in the city of São Paulo?	In your opinion, what were the main impacts of the pandemic on the bars and restaurants sector in the city of São Paulo?
2	What are the main changes that "came to stay"? Why?	What are the main changes that "came to stay"? Why?
3	What are the main challenges you foresee for the coming months? How can you overcome them?	What are the main challenges you foresee for the coming months? How can you overcome them?
4	Have you noticed changes in restaurant menus? What do you believe motivated them?	Have you promoted changes in the menus of your restaurants? For what reasons did you make these changes?
5	What strategies do you think should be adopted by the enterprises to attract new clients and "win back" the old ones during this pandemic period?	What strategies do you think should be adopted by the enterprises to attract new clients and "win back" the old ones during this pandemic period?
6	Bars and restaurants have always been spaces for socializing. How will the new rules for social distancing interfere in the saloon service and in the conviviality among customers?	Bars and restaurants have always been spaces for socializing. How will the new rules for social distancing interfere in the saloon service and in the conviviality among customers?
7	The upscale restaurants involve the creative food, the decoration, the dishes, the ambiance and the service. Do you see any specific challenge for this segment, considering that delivery and take out cannot supply these other elements and maintain the notion of dining experience with the limitation of physical space?	The upscale restaurants involve the creative food, the decoration, the dishes, the ambiance and the service. Do you see any specific challenge for this segment, considering that delivery and take out cannot supply these other elements and maintain the notion of dining experience with the limitation of physical space?
8	Do you believe that delivery services will continue with the same strength now that the restaurants are reopening? Justify.	Have you adopted delivery services during the closure of physical stores? If yes, will you keep them? Why or why not?
9	Faced with the immediate possibility of restaurants reopening, do you feel ready to frequent bars and restaurants?	Faced with the immediate possibility of reopening restaurants, do you feel ready to open your restaurant again?

Source: the authors(2020)

that "[...] all establishments had to close their doors without any preparation for it" (Chef 2). The sharp drop in sales and its impact on jobs was mentioned by all interviewees and summarized by Expert 5: "The biggest impact was the decrease in sales, which brought significant losses, made it unfeasible to maintain many establishments, and consequently generated mass layoffs. As a good part of those laid off are socially vulnerable people, this aggravated the socioeconomic crisis in the pandemic (Expert 4).

All the interviewees mentioned the definitive closure of

several establishments. The consequences of the suspension of operations were aggravated by the characteristics of the industry itself: "Few restaurants had the resources to maintain themselves without operating and paying their fixed bills, staff, and suppliers. Simply impossible. It is already difficult to keep a restaurant open receiving customers, who will say stopped" (Chef 2), an opinion shared by Expert 4: "because they are operations with relatively high fixed costs that involve expenses such as rent, water, electricity, payment of employees and suppliers, the bars and restaurants need to operate in full to cover the bills". For Chef 3 "it was

Table 4 – Characterization of the deponents

	Category	Credentials
1	Expert 1	Drinks business consultant, bar and restaurant implementation, service and hospitality management; professor of courses for entrepreneurs and lato sensu post-graduate courses; presenter of culinary reality shows; entrepreneur in the dessert business.
2	Expert 2	A journalist specialized in gastronomy with more than 10 years of experience in the area, having in her resume contributions to the main magazines and newspapers about gastronomy published in Brazil.
3	Expert 3	Digital influencer about bars, restaurants, and travel. Winner of a reality show about investments.
4	Expert 4	A food historian and researcher for 13 years.
5	Expert 5	Chef and producer of culinary educational videos. He has been working in the gastronomy area for 10 years, with experience in renowned national and international restaurants, and has recently participated in a culinary reality show.
6	<i>Chef 1</i>	Chef for 20 years, owner of a contemporary upscale restaurant recognized with 1 Michelin star with a focus on fish, seafood and vegetables.
7	<i>Chef 2</i>	Chef for 10 years, he has held every position in a professional kitchen. He is chef and owner of an upscale contemporary restaurant with a focus on simplified presentation of ingredients.
8	<i>Chef 3</i>	He has been in the field for 14 years, and is chef and owner of an upscale contemporary restaurant with a southern influence.

Source: the authors (2020)

clear that most of the establishments did not count on efficient management that could get through this crisis. Talking to colleagues who closed down, I understood that there was no management at all. For Expert 1, the crisis generated the need for "[...] revision of the types of operation and service. Delivery had never been so essential and required so much preparation."

The new scenario demanded a quick reaction: "many chefs that before refused to be present in the delivery, had to review their position. It was the only way out to stay in the market" (Expert 2). The interviewee adds: "As the absolute majority of the establishments did not have enough cash to keep their doors closed for months, they had to migrate from one minute to the next to delivery and take away, guaranteeing a minimum profit". This sudden adaptation did not seek differentiation, but survival: for Expert 4 who invested in delivery and take away during the suspension of the conventional service did so "[...] not to save [the business], because that doesn't save, but to reduce the damage". For Chef 1 and Expert 2 many entrepreneurs who started operating with delivery were not even able to cover their expenses.

Many businesses have revised their menus due to the characteristics of the delivery and take-away systems, the difficulty of access to ingredients, and solidarity actions. Foods that "travel better", were selected, the stock and preparation procedures were rationalized. "The great difficulty was to maintain the quality of the dishes. You can't deliver on delivery the same food prepared at the restaurant table" (Specialist 5). In face of the imposed limitations, other alternatives were created, such as the elaboration of specific dishes for delivery: "I completely changed my restaurant's menu and created different arms within the operation, such as PF

(set meal) PF for lunch, frozen food, dinner menu, and on Saturdays feijoada and roasted chicken. It was a mix of trial and error" (Chef 2). Believing that people in his region would not pay R\$50.00 or R\$70.00 for a dish, he did his best to find a balance between quality and value and guarantee customers every day: "[...] I had to create another face for my business, a simpler line of cuisine. I can say that I lost some of the original identity, which many people are not willing to do. But, in my case, I'm worried about surviving" (Chef 2). Chef 3, when adopting delivery, made few changes, motivated mainly by seasonality (something foreseen in the restaurant's proposal) and the difficulty in obtaining certain products. The difficulty in disposing of production even motivated the solidarity action of Arturito restaurant, which "[...] every day makes the farmers' plate" (Expert 2) as a way to support small producers whose production distribution was compromised in the period.

The new form of operation generated other consequences in the management of the restaurants: "The leaner menu allowed the decrease of purchase items and inventory, allowing better management" (Expert 1). For Expert 3, the menu restriction decreased the purchase inventory that was reorganized in many restaurants to avoid waste and losses. Structural adaptations in food production and delivery logistics were also necessary from ANVISA's recommendations (mentioned in chart 1 and 2), besides the creation of partnerships with apps and delivery systems. Only Chef

3 These are those whose texture, presentation and flavor are little altered during transportation. For example, fried foods lose their crispy texture and risottos and pasta with creamy sauces lose their velvety texture and good presentation.

4 Abbreviation for "prato feito", it designates a meal assembled by the restaurant and not by the customer.

1 stated that he had not adopted delivery or take away, for believing that these services do not work with the profile and focus of his restaurant, preferring to stop his operation altogether.

Trends, competitiveness and challenges in the return

For all interviewees, delivery, the protagonist during the closure period, should be incorporated permanently, but with immediate loss of sales volume when restaurants reopen. "I think that the deliveries will not continue with the same strength, but they will be indispensable in every operation, because everyone will be programmed for this delivery. But I think that if the delivery reopens, it will drop immediately" (Expert1). Expert3 observes that the businesses that have already adapted to perform this operation should keep it as another source of income, considering, as highlighted by Expert1, Expert3, and Expert4, that many have incorporated the delivery habit, even more so because they now have access to products that were not available before. Part of the demand for this system must also be kept by the fear of going out to public spaces: "[...] many are afraid of going out to eat. Not to mention that the clientele of certain restaurants is formed by an older public from the risk group and can't even risk it" (Expert2).

Chef 3 weighs in: "I adopted delivery at the beginning of the quarantine. I will keep it until it fully reopens. I want to support people staying home while we are not safe, but I had to reopen so as not to go out of business. When we have the vaccine, I will discontinue it." Chef 2, who bet on delivery because it is "[...] the only way to make revenue" intends to keep it only for lunch, if the sales volume remains", since he is managing to "[...] make more revenue than with the open house and save money in several aspects". However, he points out: "[...] it's a boring operation. One thing is to open a place for delivery, another is to turn your operation into that."

The experts believe that upscale restaurants should create new delivery operations, seeking, according to Porter (1992), to invest in differentiation as a competitive strategy. For Expert 3, "the places that knew how to adapt, make different deliveries, that managed to preserve quality, will come out ahead". For Expert 1, one of the great lessons of the pandemic is the understanding that it is necessary to think about different ways of serving: "We will always prepare ourselves to have delivery and deliver convenience: table service, drive-thru, take-away, self delivery, delivery by app. Among the bets are the offer of comfort food style meals and the creation of other experiences, such as meals that can be finished at home (as Lasai Restaurant (RJ) has been offering through vacuum packaging) and virtual din-

ners (with the tasting of the meal purchased at the restaurant with other customers via Zoom).

Another trend pointed out is the revision of the delivery system itself: "[...] the fees are very high, the services are very flawed" (Expert 3). For Expert 4, the delivery market is not consolidated, there is space to be conquered, practices to improve and also foresees the creation, by the restaurants, of delivery cooperatives to avoid the "[...] gigantic fees of the big companies". Expert 2 also believes that "[...] many [restaurants] will seek new tools to not be held hostage by the application fees". Also, a greater control of hygiene and cleanliness of restaurants, food safety in establishments and delivery (including by consumer pressure) (Expert 5; Chef 3) and the abandonment of physical menus (Expert 3) should also remain in the post-pandemic.

Chef 1 is incisive and believes that all changes are transitory. Expert 4, although pointing out the permanence of some adaptations, also believes that the vaccine will make "[...] everything go back as before". He justifies his opinion based on the social function of restaurants "[...] people go to restaurants to see people, to meet, for demonstration of status, for convenience, for pleasure. So, I don't think that will change so much once people feel safe to leave their homes. Expert 3 believes that when the vaccine arrives, the flow will be reestablished in restaurants and similar places: "[...] The boteco/bar institution here in Brazil is very strong and provides for this issue of being together, being close". However, the measures determined for the reopening of the restaurants (table 2) established changes in social interaction and service offered, mainly by reducing the capacity, the distance between tables and the need to wear masks (by customers and employees). All interviewees believe that sociability in restaurants and similar establishments will only be reestablished with the arrival of the vaccine.

For Expert 1, adaptation to these rules will be more difficult in bars than in restaurants: "The bar is a place for people to meet, so it is difficult to choose who you are going to sit with, it is difficult not to interact with the table next to you, not to be so close to the waiter. The interviewee believes that, in these spaces, alcohol consumption tends to make it even more difficult to control the distance. Expert 4 also believes that informal establishments will have more difficulty adapting to the new rules.

Expert 4 notes that the main adaptation in the salon service, besides the distance from the tables, will be the use of protective equipment by the staff (gloves, masks, face shields). Expert 2 believes that the flow of service will suffer interference, since "[...] at this point, the role of the salon staff is more in keeping an eye on protocols and keeping customers safe in that environment than aspects such as hospitality - essential for the room

service." She adds: "[...] the bond established between clients and those who work in the service is paramount to create a bond with the establishment. And this will be lost in that moment".

Expert 5 believes that "[...] greater care in service might make this relationship between staff and customers even more intimate. On the other hand, the smaller number of customers per establishment and the distance between them will block one of the best experiences in a restaurant which is meeting people". Chef 1 says: "[...] the social interaction is not so much between team and clients, it is more between clients and clients, and this was not prevented, at the table the clients can talk. So I don't think there will be any problem with that.

Expert 2 believes that restaurant tables, when shared, will be occupied by relatives or close friends, or even by people in a work situation (corporate meals). Chef 3 also believes that people will return to the establishments accompanied by their closest circle: "The moment does not yet make social interaction possible. The idea is to receive small groups that already live together, and not to receive people who are meeting again after so long".

When the interviews were conducted, the reopening of the restaurants was already allowed. Chef 3, who opened his place 4 days after the flexibilization, believes in a "[...] controlled reopening, very calm and safe". He says that his return was facilitated: "We didn't fire any employees during the quarantine, they were all at home receiving reduced hours. The stock was full because of the delivery. So we opted to reopen on weekends and improve our cash flow a little. I didn't have great expenses to reopen it right away. And he ponders: "Those who have laid off or suspended contracts will have more difficulties to reopen, because the costs will rise considerably. I think that at the moment, each entrepreneur should read and decide what is best for his or her business. There are no formulas or judgments, just act responsibly." Chef 1 indicated that he was ready and that his place would open the following week. Chef 2 stated: "[...] I don't believe it's the best time to reopen, so I won't reopen the doors and I don't have a prediction. I'm still on delivery. Again, I have 20 seats and the bill doesn't close."

Of the five experts consulted, two have already gone back to restaurants as customers. Expert 1 reported having frequented, until the interview date, six places, confessing that she did not feel unsafe in some, but in others, yes. She believes that because of the mental fatigue generated by isolation, people are happy to go out and this mitigates the feeling of insecurity. Expert 3 stated that he had been to "four or five restaurants" and believes that, within the scenario of social activities, going to a restaurant is one of the safest things

because of the protocols that need to be followed: "[...] customers sit at the table, they only take their mask off at the table, if they get up to go to the bathroom or walk around the room, they put their mask back on. The risk of infection is very low, much lower, for example, than in a supermarket, in a pharmacy.

Expert 4, in turn, stated that he does not intend to go back to restaurants in a short period of time because he does not believe that there is safety for social contact, even though he knows that many establishments are following all the requirements. Expert 2 also does not intend to go back to restaurants now: "And even if I wanted to, some of my favorite ones have not reopened even with the government authorization. Later in the year, when the pandemic is more under control, maybe I will eat out again. But for now, I'll stick to delivery. Expert 5 is emphatic: "I still don't see any reason to go to restaurants and bars. It's lost some of the magic and I'm still not interested". The creation of a vaccine is mentioned by all as essential for people to feel safe to return to socializing.

In this resumption, "[...] the big challenge is to continue operating in a scenario of uncertainty" (Chef 3) since the movement should only return when the vaccine allows people to take to the streets more calmly. Specialist 1 believes that the biggest challenges are not in the operationalization of the required adaptations, since these are technical and practical decisions, but in the management of the enterprise: it will be necessary "[...] to be able to analyze and make a decision to close or not. Of course everyone is putting money in, but you have to be rational and take some of the passion out of it when you have to decide if it's worth it to keep putting money in or to close down and accept that the dream will come back one day. This is due to the fact that, even reopening the restaurant, maybe the fixed cost will not compensate for the maintenance of the enterprise, since the public tends to decrease, either for reasons of fear of social proximity, or because many customers lost jobs or had their incomes reduced (Expert 2; Expert 4).

The main challenges identified by the interviewees are: transmitting safety to customers; investing in the dining experience; surviving. On the hygienic-sanitary issue, Expert 1 highlights the team's role in transmitting this safety to diners, while (Expert 4) is adamant: the most obvious strategy is to offer the safety and transmit the feeling of safety. Chef 1 adopted as a strategy "[...] to open and assure my customer that he is safe from any kind of negative exposure from Covid if he comes to eat at my restaurant. The strategy is to show that it is a safe place for him to come and spend time with friends and family." And in order to convey such safety, the employees must also be safe (Expert 1, Expert 4, Chef 1).

When it comes to the dining experience, the challenge is to make the decision to leave home worth it (Expert 1, Expert 2, Chef 1, Chef 2, Chef 3). Chef 3 notes that "with the growth of delivery, customers will need a good reason to leave home, not just "to eat". For Expert 5, it will be essential for restaurants "[...] to work on the customers' nostalgia, to show that there can be happiness in a pandemic". For Chef 2, it is necessary to ensure that the protocols followed will not influence the dining experience, and he bets on good food and drink to balance the more distanced service. Expert 1 also reinforces the role of good service in this process: in the saloon service it will be necessary to find other ways to show that the customer is being taken care of, to do some pampering, to go beyond what the team was already doing, but following all the protocols: "[...] we will have to have other tools, whether it is a note, the way of communicating, a toast, I don't know, we have to think of other ways to show welcome".

In this process, entrepreneurs should continue to "[...] reinvent themselves, make novelties, create consumption opportunities, create deliveries with different deliveries and at-home experiences" (Expert 3). Expert 2 believes that many establishments will have to review their concepts and invest in dining experiences more broadly, an opinion shared by Expert 3: upscale restaurants, which work "way beyond food," will have to find ways to create new experiences, since no delivery replaces the full experience of eating at a restaurant.

Regarding the strategies that will be adopted to attract new customers and "win back" old ones, Expert 1 bets on communication and transparency in the processes, in order to ensure trust in the establishment's brand. Expert 2 also stresses that communication will be fundamental, and that digital marketing actions and presence in social networks should be expanded to strengthen the relationship with customers. For Expert 3, it will be the moment to explore the house's differentials, such as, for example, the existence of outdoor spaces.

The issue of financial survival was mentioned by all interviewees. Expert 4 believes that "[...] there will be a big hangover in the coming months in relation to what happened", since the economic crisis is not exclusive to Food Service. Chef 3 believes "[...] that the main challenge will be the renegotiation of debts. With the recovery, suppliers and service providers want to receive what was left behind. Either we run out of product or we get credit to pay, and then the banks come in with their absurd rates. Analyzing the situation in a similar way, Expert 2 believes that "the only way out is in the government, which should release the promised credit lines for small businesses to get through the crisis". Chef 3 is emphatic: "I believe that with management and control it's possible to recover, it's time for

the chef to look more at the numbers than at his reputation". Chef 2 summarizes: "the great challenge is only one: to survive". He adds: "we went through the worst phase, now we need to keep ourselves active, try to renew ourselves and manage not only to get new clients, but also to make the current clientele continue interested in our product".

It can be verified, therefore, that in this pandemic context many upscale restaurants that already operated in a restricted and very competitive segment, entered without planning in a broader and equally competitive segment: the delivery and take away. The delivery segment, protagonist during the suspension of traditional public service activities, experienced, from the point of view of competitive forces (Porter, 1991), the entry of new competitors, the threat of substitute products and, consequently, the increase of rivalry between competitors. Thus, the insertion and maintenance in this segment demanded from the upscale restaurants the revision of their competitive advantage strategies (Porter, 1992) in terms of low cost, focus and differentiation.

In this process, rare strategic resources (Salazar et al., 2016) usually adopted by upscale restaurants had to be abandoned or adapted to ensure the survival of these establishments. This survival will depend on management skills associated with creativity and the ability to create new dining experiences in the face of current constraints.

Summary of respondents' contributions and practical implications

Regarding practical implications, to deal with the impacts caused by the restrictions imposed in face of the pandemic COVID-19, it was evident that, in the respondents' opinion, it is necessary that restaurants a) invest in management - of menu, of purchases and stock, of costs - and also rethink their production processes; b) understand that delivery and take away are operations with their own specificities, that require the creation of specific menus and that have specific costs (such as appropriate packaging and partnerships with delivery apps); c) exercise creativity to create new products and services, creating special menus, frozen food lines and other experiences (such as pre-prepared meals that must be finished at home); d) invest in the meal experience - so that customers realize (or remember) the benefits of having meals away from home; e) not only follow the hygiene and sanitary safety rules, but also show that customers are safe there. Regarding the main challenges, it is a consensus that restaurants need to be prepared to act in a context of a generalized economic crisis, since the negative effects of the pandemic extended to different sectors of the economy and are not expected to be recovered so quickly.

Table 5 summarizes the respondents' main contributions: (CONTINUA)

	Respondent	Impacts and changes	Trends and Competitiveness	Challenges
1	Expert 1	Sharp drop in revenues, loss of jobs, definitive closure of establishments, need for quick adaptation and adoption of other types of operations and services; review of management processes (menu, purchasing, inventory)	Maintenance of delivery, but with loss of importance for the establishment's revenues; create new ways to serve and deliver convenience; create new delivery options, escaping the conventional offer; invest in the dining experience	Maintaining the rules of social distancing in bars; transmitting safety to the diners; exercising creativity in terms of products and services; reviewing the management processes of the establishment and identifying if it continues to be financially viable; surviving in a generalized crisis scenario
2	Expert 2	Sharp drop in sales, loss of jobs, definitive closure of establishments, need for rapid adaptation and adoption of other types of operations and services	Maintenance of the delivery, but with loss of importance for the establishment's revenues; review the practices and agreements with delivery companies	Exercise creativity in terms of products and services; survive in a generalized crisis scenario
3	Expert 3	Sharp drop in sales, loss of jobs, definitive closure of establishments, need for rapid adaptation and adoption of other types of operations and services	Maintenance of the delivery as an important source of income for the establishment; creation of new delivery options avoiding the conventional offer; revision of delivery practices and agreements; permanent abandonment of physical menus; re-establishment of old habits once the population is	Exercise creativity in terms of products and services; survive in a generalized crisis scenario
4	Expert 4	Sharp drop in sales, loss of jobs affecting mainly socially vulnerable people, permanent closure of establishments	Maintenance of delivery as an important source of income for the establishment; review of delivery practices and agreements; re-establishment of old habits once the population is vaccinated	Exercising creativity in terms of products and services; surviving in a scenario of widespread crisis; maintaining the rules of distance in more informal establishments; maintaining the link between the customer and the establishment; transmitting security to diners
5	Expert 5	Sharp drop in sales, loss of jobs, definitive closure of establishments, need for rapid adaptation and adoption of other types of operations and services	Maintenance of the delivery, but with loss of importance for the establishment's revenues; adoption of the most rigorous measures in terms of hygiene, cleaning and food safety	Exercising creativity in terms of products and services; surviving in a scenario of widespread crisis; maintaining the link between the establishment and the customers; maintaining the quality of service with social distancing measures
6	<i>Chef 1</i>	Sharp drop in sales, loss of jobs, permanent closure of establishments	Immediate return to traditional operation and old customer habits when the population is vaccinated; investing in the dining experience	Investing in the dining experience; conveying safety to diners; financial survival in a generalized crisis scenario

Table 5 summarizes the respondents' main contributions: (CONTINUAÇÃO)

	Respondent	Impacts and changes	Trends and Competitiveness	Challenges
7	Chef 2	Sharp drop in sales, loss of jobs, definitive closure of establishments;	Maintenance of delivery as one of the operations of the house; invest in the dining experience; review of manage-	Exercising creativity in terms of products and services; financial survival in a scenario of generalized crisis; captu-
8	Chef 3	Sharp drop in sales, loss of jobs, definitive	Maintenance of delivery only until full vaccination of the	Exercise creativity in terms of products and services; conti-

CONCLUSION

The effects of the COVID-19 pandemic in the foodservice sector are still partially known. The specificities that differentiate the upscale restaurants in this market also imposed great challenges: the difficulty of converting an authorial menu to the delivery and take away services; the impossibility of continuing to work on their competitive differentials in terms of presentation of dishes, ambiance, and polished service; the difficulty of reopening with reduced service capacity in lounges that are already planned to receive few people.

It is noteworthy that in this critical period, in face of the sharp drop in revenues, many chefs and entrepreneurs of the upscale segment had to enter another market with its own characteristics and rules, that of home meal service through delivery and take away, which required the revision of their strategies to seek competitive advantage, both in terms of operation cost, differentiation and product/service focus.

If at a first moment the reactions and adaptations sought the survival of the enterprises, the reopening of the activities seems to have inaugurated a new phase, which will demand from the managers rationality and a review of several processes. Although two of the interviewees indicate that the changes and adaptations made are temporary and will be abandoned when an effective vaccine is approved, other interviewees foresee the definitive adoption of some of the emergency measures: from the effort to rationalize the menu and the management of purchases and stocks, to the use of creativity to create differentials (both in the lounge services and outside them) and the abandonment of the physical menu.

The interviewees' expectation is that now begins a period of great challenges, of attention to the financial health of the establishments, of strict adoption of safety protocols for employees and customers, and of a great effort to win back the "face-to-face customers". There is the understanding that the full resumption of activities will only happen with the circulation of an effective vaccine, but there is also the expectation that the social functions of restaurants - seen as places of entertainment and socializing - also play a key role in this process.

Considering that there is no immediate forecast of an

effective control of the pandemic COVID-19, we identify the need for a continued study of the food service sector - especially restaurants (not only those belonging to the upscale niche) - trying to identify not only the main negative effects of the pandemic process, but also the changes, trends, and solutions found by entrepreneurs facing the new consumption habits of their consumers.

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