RESTAURANTS AS A CONTRIBUTOR TO TOURIST DESTINATION ATTRACTIVENESS

PHASE TWO: CONSUMER INTERVIEWS

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EXECUTIVE SUMMARY

Although food and wine is an important dimension of the tourism industry, little research has been conducted into the nature or the role of restaurant experiences in adding to the tourism product. This preliminary study forms part of a three-phase project, which aims to enhance our knowledge through developing a greater understanding of the contribution of the restaurant sector to a tourist destination's image. Phase one detailed the opinions and attitudes of leading Australian experts in the food, wine and tourism industries. The current report delves into the beliefs, values and attitudes of consumers in order to ascertain what they value (in a restaurant and at a holiday destination) and why. Phase three will culminate in the construction of a questionnaire which will be analysed using samples of consumers along the eastern seaboard of Australia and the inbound United States market.

A convenience sample of eleven consumers was obtained for the purposes of this study. These consumers differed with respect to demographic factors such as age and income, as well as psychographic factors, such as life stage. Semi-structured telephone interviews were conducted covering a range of areas relevant to the topic. A laddering technique, which involves the use of in-depth questioning to work towards identifying consumers' underlying goals, beliefs and values, was used in order to gain a better insight as well as more detailed and valuable information. Interview transcripts were analysed, revealing six major categories with a range of sub-themes emerging:

Holidays

The first category of interviewee comments yielded information on aspects of a destination which consumers found attractive and appealing. A range of factors were mentioned, including the culture, the number and nature of facilities available and being able to engage in "*lots of activities all of the time*". In order to obtain more realistic information, consumers were questioned on the kinds of experiences they actually had while on holiday. The impact of restaurants was highlighted here with 45% of consumers mentioning cuisine and dining out as part of their most recent holiday experience.

Restaurants

The second category used for grouping consumer responses concentrated on restaurants and was further divided into four subcategories. Consumers were asked what was important about restaurants when they were on holiday and why; hence increasing our understanding of consumer desires, values and end-states (inner beliefs and attitudes). Most participants desired friendly service and good quality food; they valued their health and having their expectations met because this made them feel a range of positive emotions. A different set of underlying beliefs and attitudes were obtained from those consumers who mentioned that restaurants featured strongly in their destination choices. These details are particularly noteworthy since an added insight is gained into the psyche of these 'culinary tourists'.

Accommodation

Details were sought from consumers on their choice of accommodation in relation to location of restaurants. The vast majority of consumers said they chose their accommodation based on the availability of restaurants in the area. The general response was that most consumers valued being able to walk to and from the restaurant.

Ratings of Australian Destinations

Consumers were asked to rate key Australian destinations based on their association with good dining out possibilities. Melbourne received the highest rating, with a score of 4.6 out of 5. This was followed closely by Sydney, with an average rating of 4.5. Canberra received the lowest rating, with an average score of 2.5 out of 5.

Information Sources

Details were sought on the kind of information sources consumers tend to rely upon when choosing a restaurant (when on holiday). Most consumers favoured print media, i.e. travel brochures and guides, newspaper articles and magazines. Word of mouth recommendations were also highly favoured.

Food Destinations

Lastly, an interesting range of aspects were mentioned when participants were asked what makes a place a good 'food' destination. Variety – in the cuisine and in the eating establishments – was seen as a key aspect by most consumers. This was followed by the prospect of regional food produce and receiving value for money.

In summary, this preliminary study has helped develop an understanding of the importance of the restaurant industry in relation to a tourist destination's image. It revealed the importance of service, food quality and health and safety to consumers; the underlying desires, values, attitudes and beliefs of 'culinary tourists'; and the sheer diversity of consumers' wants and needs. Furthermore, this report paves the way for a large-scale quantitative analysis into the significance of restaurants and culinary tourism for differing consumer segments.

1. INTRODUCTION

This report forms Phase two of a three-phase project that aims to develop a greater understanding of the contribution of the restaurant sector to a tourist destination's image. Phase one of the project detailed the opinions and attitudes of leading Australian experts in the food, wine and tourism industries (see Sparks, Wildman & Bowen, 2000). The current report delves into the beliefs, values and attitudes of consumers in order to ascertain what they value (in a restaurant and at a holiday destination) and why. It specifically investigates consumers' information sources in relation to eating out; which features of restaurants contribute to a destination's image; when and how restaurants feature in consumers' travel destination choices; and the feelings and values which underlie their destination and restaurant choices. Phase three will culminate in the construction of a questionnaire which will be analysed using samples of consumers along the eastern seaboard of Australia and the inbound United States market.

What follows is a brief introduction of the topic, namely a review of the literature and the current status of food and wine in the tourism product. For more specific and detailed background information, see Sparks *et al.* (2000).

1.1 Background

The restaurant industry has evidenced strong growth in the past 10 years, with tourist destinations such as the Gold Coast reflecting a particularly strong growth pattern from 386 restaurants in 1994 to 596 restaurants in 1997 (ABS, 1998). The restaurant sector not only mirrors Australia's multi-cultural history but evidences an exciting development of interest by consumers in visiting a destination for culinary experiences. Australian destinations are becoming well-known on the world market as food destinations, and other products, such as wine and cheese, are earning global respect in addition to restaurants (Apple, 1998). Reasons for the current restaurant demand involve changes in leisure patterns (longer working hours), increased female participation in the workforce, smaller families, higher disposable income and the fact that "the market is increasingly experienced, well-travelled, discerning, and in search of new experiences" (Hing, McCabe, Lewis, & Leiper, 1998: p. 269).

However, consumers are not the only ones becoming increasingly interested in cuisine; the media and various tourism and industry bodies are also displaying rising attention and coverage. The number of restaurant guides, food/travel magazines and restaurant-related newspaper articles is testimony to the media industry's growing focus on food and wine. National and State tourism bodies are busy developing their respective wine and food products and most States already have strategic food and wine plans in place. Meanwhile, anything and everything to do with restaurants, food and wine is available on the Internet. Increased attention in all three areas seems to indicate a general interest in all things culinary. It is also a reflection of the industry's need to keep up with the current demand.

Although food and wine are an important dimension of the tourism industry, little research has been conducted into the nature or the role of restaurant experiences in adding to the tourism product (Westering, 1999). It is proposed that the restaurant industry also plays an important role in the development and maintenance of a tourist destination's image. Some examples where the destination's image has been linked to restaurant culture include Noosa, Melbourne, and Adelaide, and each of these destinations use restaurant culture to promote the tourism product. This trend is also evident in the marketing of many international destinations, with New York's Convention and Visitor Bureau mounting a campaign to promote New York as a destination where tourists will find some of the best restaurants in the world (Prewitt, 1998).

As tourists engage in the destination choice process it is proposed that restaurant culture plays a significant role in the development of perceptions and cognitions about a destination, especially for domestic tourism and short stays. As Symons (1999) reports, restaurant meals can contribute to a tourist's experience through connection to the host culture. Similarly, for many tourists, the experiences and subsequent memories associated with restaurants can be an important component of satisfaction assessments of a destination. However, the relative importance of a restaurant culture is likely to vary by tourist segments. Phase three of the project seeks to determine which segments are likely to be influenced by restaurant culture in making their destination choice.

2. METHOD

2.1 Participants

A convenience sample of 11 consumers agreed to participate in the study. In relation to participants' life stage, the sample was made up of two young singles, one midlife single, two young couples, two young families (one with children under pre-school age, the other with children under school-age), two midlife households with school-age children and two retired households. Specifically, six females and five males took part in the study. Participants' ages ranged between 24 and 60, with a mean age of 40. Six participants were married, and incomes – both single and household – ranged between $20 000 and $100 000+ p.a. The majority of participants (82%) lived in Queensland while the remaining resided in New South Wales. All participants had taken some sort of holiday in the last year. Participation in the interviews was entirely voluntary, although participants did receive a small gift as a token of appreciation for their support.

2.2 Materials and Procedure

Semi-structured telephone interviews were the means in which information was gathered. These interviews took between 20-30 minutes to complete. All interviews were tape-recorded, yet it was agreed to keep participants' identities anonymous. Participants were asked a series of questions with the aim of seeking out their ideas and beliefs on the relative contribution restaurants make to a tourist destination's attractiveness. The same set of key questions were asked of each participant. Supplement questions were asked of consumers who believed that restaurants featured heavily in their destination choices.

In addition, this study sought to determine consumers' underlying goals, beliefs, attitudes and values. A laddering technique (also called a means-end chain) was used in order to achieve this purpose. The laddering technique involves the use of in-depth questioning which begins with eliciting a person's desires (*the means*) and works towards identifying their inner goals, beliefs and values (*the end*) (Woodruff & Gardial, 1996). Hence:

Desires → *Values* → *End-states*

To provide more detail about consumers' end-states, participants were asked what was important about restaurants when they were on holiday. After stating their desires, consumers were asked "Why is that important?" thus obtaining information relating to their values. The question was repeated until the consumer arrived at their end-state – their inner wants and needs. This method was based on recent developments in means-end chain theory (Pieters, Bottschen & Thelen, 1998) and formed the basis of the interviews.

3. RESULTS

Interviews were transcribed and then analysed using NUD*IST, a computer package designed to assist the process of qualitative data analysis. With the aid of NUD*IST, six major categories or themes emerged. Within these major categories, smaller, more discrete groupings were revealed. These categories will be discussed separately below.

3.1 Holidays

This first category centred around two sets of questions. The first set sought to identify the main factors that make a tourist destination attractive to consumers. Of those main factors, consumers were then asked to identify the single most important factor. These questions were focused on obtaining information regarding consumers' perceptions of their 'ideal' holiday. The main factors that made a destination attractive to participants were (in order of most-to-least mentions): the culture, the opportunity to have interesting or different experiences, that a range of activities could be had, the number/nature of facilities available, the cost of the holiday, food/restaurants, health and safety, warm climate, family and/or friends live there, beaches, activities for children, and solitude. Of those main factors, two participants felt that activities – "*lots of activities all of the time*" – were the most important. Another two felt it was contingent upon the destination, as the following quote illustrates:

> "*Well, it would depend on where we go. I mean, if we go to Europe, we go and see relatives, which would be the first consideration. But if we're going to Asia, it might be the culture. It depends on where we're going. I mean, one of the things we're planning on is going to Africa so I mean we want to see the scenery and the wildlife, you know. It's a bit difficult to narrow it down.*"

The remaining participants each listed different destinational aspects as being most important for them. These were: accommodation ("*and what it has to offer*"), health and safety, history, culture, getting good value for money, having a kids' club (activity club for children) and quietness.

The second set of questions were reality-focused and sought to elicit the various kinds of experiences participants actually had while on holidays. Participants were asked to talk about their most recent travel experiences and what it was that made the destination appealing. As shown in table 1, 45% of consumers mentioned cuisine and dining out as being part of their most recent holiday experience. In general, these consumers' comments centred around the attraction of trying new or different cuisine and being able to indulge by dining out more frequently than they usually would.

Table 1 Recent Travel Experiences and Appeal

TRAVEL EXPERIENCES	#PARTICIPANTS MENTIONING EXPERIENCE	APPEAL OF DESTINATION – WHY CONSUMERS CHOSE THAT PARTICULAR DESTINATION	#PARTICIPANTS MENTIONING APPEAL
Outdoor activities: walking, swimming, diving, sight-seeing	6	A range of factors appealed	3
Having an experience: new, different, unique or interesting	5	Getting good value for money	3
Food: trying different cuisine or indulging by going to restaurants more often than usual	5	Activities: having lots to do	3
Cultural	4	Visiting friends or relatives	3
Getting good value for money	3	Work-related	2
Being familiar with the destination	2	Opportunity for something new	2
Shopping	2	No problems: politically or culturally	2
Climate (warm)	1	Cuisine	1

TRAVEL EXPERIENCES	#PARTICIPANTS MENTIONING EXPERIENCE	APPEAL OF DESTINATION – WHY CONSUMERS CHOSE THAT PARTICULAR DESTINATION	#PARTICIPANTS MENTIONING APPEAL
Accommodation	1	Having an authentic experience (as opposed to a tourist experience)	1
Arts: museums, theatre	1		
Visiting family and friends	1	Outdoor activities	1
Work-related	1	Activities for the children	1
Seclusion, peace and quiet	1		

3.2 Restaurants

The second category used for grouping consumer responses concentrated on restaurants and was further divided into four subcategories to correspond with the interview questions. These subcategories are discussed separately.

3.2.1 Sorts of restaurants

When consumers were asked to describe the sorts of restaurants they tend to eat at while travelling, 82% said they prefer authentic or ethnic cuisine. Italian, Thai and Chinese restaurants were mentioned among the kinds of restaurants consumers usually visit while holidaying. Eating where the locals eat was seen by some as an ideal way to find cheap, authentic cuisine. Others viewed it as a way of getting in touch with the culture, as this quote shows: "*We don't just go in and want a pseudo-tourist thing. Again we like to get into the culture of things, so we sort of try to eat where the locals eat.*"

Other sorts of restaurants mentioned by participants were comfortable or casual restaurants (mentioned by 5 participants). This was followed by healthy restaurants (4 participants), restaurants that offer BYO, are good value for money (3 participants each), are interesting or different (2), convenient (1), family-oriented (1) and offer a wide selection of dishes (1). Four participants mentioned some type of restaurants they would not patronise. These restaurants were described as "*big hotel*", "*up-market*", "*5-star*" "*expensive*" ones. Some respondents also mentioned they would not eat at a fast food restaurant. Finally, a category was made up of three participants who felt their choice of restaurants were contingent on outside factors; namely, their choice was contingent upon how they felt, what country they were in and whose company they were in (i.e. their children's). For example, one consumer said: "*It just depends. I mean it really depends on where I am and how I feel*", while another said:

> "*You don't want to go to a restaurant, like a romantic restaurant where it's quiet, and you've got kids that are throwing food beside you, so we sort of keep away from those ones. Cafes are ones we'll go to, anything that's a bit friendly. In the case if we went by ourselves, if we got a baby-sitter in to look after the kids, then we'd go somewhere different, you know, we'd go somewhere nice.*"

3.2.2 Underlying values and attitudes

Consumers were asked what was important about restaurants when they were on holiday. As Table 2 shows, food quality and good friendly service were two desires mentioned by the majority of consumers. Participants were then asked why their desires were important to them. Staying healthy and meeting expectations were values mentioned most. Participants were also asked why their values were important to them in order to gain an understanding of their innermost wants/needs and attitudes. Positive emotions – happiness, contentedness, relaxation – were the end-states consumers desired most. The following quotes illustrate the means-end process of drawing out consumers' inner values and attitudes (see Appendix A for diagrams which also illustrate this process):

> "*(Why is quality of food important?) I expect to get what I pay for. (And why is it important to have your expectations met?) Well if I don't have my expectations met, I won't go back and I certainly would make people aware that that restaurant was not providing the quality of food that they should be. (So it's important because…) I get upset if people are supposed to be doing a certain thing and they're not.*"

> "*(Why is friendly service important?) It makes your night more relaxing …and it makes the whole experience easier. (Why is that important?) When you go into a restaurant and you get friendly*

service, there's no dramas in there. (And why is that important?) When you're eating, and relaxing and enjoying the atmosphere, you don't have to worry about a waiter hassling you or how dirty the restaurant is – you know, those sorts of things – you're peaceful and relaxed and you can enjoy your meal and not have to worry about other things …"

Table 2 What's Important About Restaurants: Consumers' Desires, Values and End-States

DESIRES	#PARTICIPANTS WHO VOICED	VALUES	#PARTICIPANTS WHO VOICED	END-STATES	#PARTICIPANTS WHO VOICED
Food quality	8	Healthy	4	Positive emotions	9
Service	6	Expect certain standards	4	Excitement	2
Cleanliness, health & safety	5	Respect	2	Enjoy holiday	2
Value for money	5	Relaxation	2	Good morals	2
Reputation	4	New or interesting experience	2	Education	1
Location	3	Negative emotions	2	Responsibility	1
Variety	2	Learning experience	1	Personal	1
Atmosphere	2	Fussy	1	Righteousness	1
Precinct	1	Modernism	1	Competition	1
BYO	1	Cheaper	1	Different experience	1
		Fairer	1		

3.2.3 How Restaurants feature in destination choices

Two consumers (18%) said restaurants were a key part of their destination choices; two (18%) said restaurants were part of their choice; five (45%) felt that restaurants did not feature in their choice, and 2 (18%) felt it was contingent upon the destination. While many consumers felt restaurants did not feature in their <u>choice</u> of a destination, the significance of restaurants on consumers' satisfaction was impacted <u>upon arrival</u> at their chosen destination. The following quote from one consumer demonstrates this line of thinking:

> "*I don't plan a destination based on restaurants. So in that sense, they're not a significant enough issue that I would go or not go somewhere based on restaurants. However, once I'm there, I do find that my sense of how I've enjoyed a place does revolve around very much around the quality of the food and the quality of restaurants that I've stumbled across in that situation.*"

3.2.4 When Restaurants feature strongly in destination choices: consumers' underlying values and attitudes

This set of questions was originally meant for those consumers who felt restaurants were a key part of their destination choices (defined here as being over 40% of their holiday destination choices). This was true for the two consumers mentioned above. However, another consumer was also asked these questions, since restaurants featured heavily in this consumers' most recent holiday experience. The destinations where restaurants featured strongly, were Montville, Brisbane, Melbourne and Singapore.

Consumers were asked which aspect of the eating experience attracted them to the destination and why. Since all three consumers listed divergent desires, values and end-states, each consumers' means-end chain is displayed below:

Desire		*Value*		*End-state*
Variety	→	Choice	→	Gives me freedom
Local produce	→	Freshness	→	Is healthy and safe
Chef's reputation	→	Confidence, security	→	Relaxed, happy

All three consumers said they told others about their dining experiences and that they would return to their chosen destinations because of their dining experience. One consumer mentioned she would not return to one of her chosen food destinations because "*we didn't enjoy the wine.*"

3.3 Accommodation

When consumers were asked whether they chose their accommodation based on the availability of restaurants in the area, 91% said they did. One consumer mentioned this was because it was less restrictive price-wise (i.e. more choice, less expense), while all others talked about the benefits of proximity, particularly being able to walk to and from the restaurant:

> "*We definitely choose something where we can stay right where the restaurant is and we don't have to catch cabs anywhere. It's easier and more enjoyable, you don't have to worry about anything, you can just walk down to the restaurant …It's really convenient.*"

One consumer felt his or her choice of accommodation in relation to restaurants was not applicable, since:

> "*I normally don't stay in places that are out of the way so I always presume that if I'm staying somewhere in a down-town area, that there's restaurant facilities there.*"

3.4 Ratings of Australian Destinations

Participants were asked to name those Australian destinations that they associate with good dining out possibilities. Melbourne and Sydney were mentioned by the majority of participants, while the Gold Coast was mentioned by five participants. Other destinations that received a mention were Brisbane, Noosa, Hobart, Adelaide, Perth, Byron Bay, Hamilton Island, Hayman Island and "major cities". One consumer stated that she could not identify good food or restaurants with any particular destination, since she felt:

"It doesn't really matter where I go because I'm sure I can find good food, it doesn't really matter where, it would just be a matter of searching and really finding a place that's good or eating in a couple of bad places until I find something that's good."

Participants were then asked to rate a number of destinations within Australia, based on their association with having good restaurants. Ratings were on a five-point scale, with one meaning the consumer did not associate the destination with having good restaurants and five meaning they strongly associated the destination with having good restaurants. As can be seen from Table 3, Canberra was given the lowest average rating, with an average score of 2.5. This was followed closely by far North Queensland and the Northern Territory. Melbourne received the highest rating, with a near-perfect score of 4.6, closely followed by Sydney. Noosa, Brisbane, New South Wales and Victoria were all destinations above the group average of 3.4.

Table 3 Consumers' Ratings of Key Australian Destinations

DESTINATION	AVERAGE RATING (OUT OF 5)
Gold Coast	3.4
Noosa	3.5
Brisbane	3.6
Far North Queensland	2.6
Sydney	4.5
Melbourne	**4.6**
Canberra	**2.5**
New South Wales	3.5
Victoria	3.5
South Australia	3.2
Tasmania	3.3
Western Australia	3.1
Northern Territory	2.9
(Overall) Group Average	3.4

3.5 Information Sources

Details were sought from consumers on the sort of information sources they tended to rely upon when selecting a restaurant (when on holiday). The information source most consumers used to find out about a destination's eating out options was the media, with nine participants mentioning this source. Included under this category were travel guides (e.g. the Lonely Planet), brochures from travel agencies, newspaper articles, magazines and TV programs. Word of mouth recommendations were the next most favoured information source, followed by the internet, the consumer's own knowledge and wandering around until a restaurant is found which looks appealing.

3.6 Food Destinations

Consumers were asked to list aspects that make a place a good 'food' destination. The characteristics and selected comments are shown in the Table 4.

Table 4 Aspects of a Good 'Food' Destination

ASPECTS	# PARTICIPANTS MENTIONING	SAMPLE QUOTES
Variety	8	"I guess variety, in the food and in the eating out options." "But if the number and the variety's there, then you're bound to find some good restaurants."
Regional food	4	"Ah, well what produce the region has – if it specialises in something. For example, the Hunter Valley, you've got the Hunter Valley wineries, around the wineries you always get a conglomeration of fine food areas or little cottage industries – cheeses or whatever – that makes the region. So the regional aspects or the culinary side of it." "If a destination is coastal, if the place specialises in seafood, that can make it an interesting destination to go."
Value for money	3	"Well, for us, we resent having to pay a lot of money for food, but we still like to eat out, so we like to have a moderately priced meal. Good value, good quality at a good price."
Reputation	2	"Well it is reputation or hearing about them, isn't it, it's advertising."

ASPECTS	# PARTICIPANTS MENTIONING	SAMPLE QUOTES
Partnerships	2	"Sometimes in conjunction with other things, like if it's a wine district, if it has a good reputation for quality wine, that can be another factor that reflects on how good are restaurants or how diverse the restaurants are."
Number – access	2	"I think the number of restaurants, like if there's a lot of restaurants. If you go to Noosa, the whole of Hastings Street is all restaurants. But if you don't have to go very far, you just cruise along and find one."
'Trendy' community	1	"So you've got trendy places. Probably the type of community ah, yuppies and probably the gay community start a bit more trends, they start some type of trend."
Tradition	1	"And of course if you go through Europe, you've got tradition there too. You've got all kinds of cottage industries over there that have been established for hundreds of years …"
Ambience	1	"I suppose it'd just have to be the outlets, the restaurants themselves – their ambience"

4. DISCUSSION AND RECOMMENDATIONS

A key focus of this study was to determine consumers' underlying beliefs, attitudes and values. Thus, interview questions centred around what specifically was important about restaurants when consumers were on holiday and why. It was the *why* that we were most interested in – the wants, needs and values. Some interesting outcomes came to light that will be discussed below.

- The sheer diversity of consumers' tastes and values was clearly apparent throughout the bulk of the interviews. For example, when asked what sort of restaurants participants tend to eat at while travelling, many different restaurants were described, and many different factors were mentioned that make a restaurant attractive. Likewise, consumers listed several characteristics that make a destination attractive. It appears then, that consumers vary extensively in their experiences, choices, values, preferences and attitudes. This finding may seem surprising given the relatively small number of consumers interviewed, yet it is testimony perhaps to the growing divergence in the consumer market.

- Although many differences were noted in the consumer interviews, some similarities were also apparent. One characteristic which was mentioned frequently by consumers was "value for money". Value for money was mentioned in many different subcategories. For example, it was mentioned as being an attractive feature of a holiday destination; as being the most important feature of a destination; as being an appealing aspect of a destination; as a part of consumers most recent holiday experiences; as a feature of the restaurants consumers visit on holidays; as something consumers desired; and as something which made up a good 'food' destination. It seems obvious then that a destination and its restaurants can only benefit through their marketing and promotion of "good value for money". By focussing on this important characteristic, the destination could potentially attract consumer markets from various life stages.

- Another similarity was evident in consumers' end-states (their inner wants and needs). Not surprisingly, positive emotions – such as happiness, relaxation and contentedness – were mentioned by the majority of consumers as something they inherently strove for. It was how consumers reached this end-state that differed. Food quality and friendly service were two desires mentioned most often by consumers, while the most mentioned values were health and having one's expectations met. Restaurants that concentrate on the areas of service, food quality and health and safety will perhaps meet their customers' expectations and accomplish a higher level of customer satisfaction.

- A small number of consumers declared that restaurants featured strongly in their choice of a destination. Since these consumers represent that segment of the market interested in a destination because of the possible culinary experience, their desires, values and end-states were explored. A multitude of desires, values and end-states were revealed which once again reflects the diversity of the consumers' tastes.

- Variety – in price and cuisine experiences – was revealed as the major characteristic of a good 'food' destination. Partnerships – e.g. between restaurants and wineries – were also an attraction for some consumers. These and other characteristics will be further investigated in Phase three of this project.

- The concept of regionality – using locally-grown produce specialities – was also mentioned by consumers as a key feature of a good 'food' destination. The fact that this concept was also revealed in Phase one of this report (Sparks, Wildman & Bowen, 2000) underlies its importance. This report evidences the potential benefits for destinations and regions which embrace this concept and actively market and promote their specialities. It is recommended that all destinations develop their local specialities and aim to measure and achieve some degree of success in order to remain competitive.

- Close to half (45%) of consumers interviewed stated that cuisine and dining out formed part of their most recent holiday experience. These consumers felt the attraction was related to the appeal of trying new or different cuisine and being able to indulge by dining out more frequently than usual. Relaxing, indulgent experiences form part of lifestyle tourism, which is a new dimension of the tourism product. The apparent consumer interest in these kinds of experiences is reflected in the interest shown by State tourism authorities in their marketing campaigns (e.g. South Australian Tourism Commission, 1996).

5. CONCLUSION

This preliminary study investigated the beliefs, attitudes, values and inner wants and needs of 11 consumers in Queensland and New South Wales. These consumers helped shed some light on the nature and extent of restaurants as contributors to a tourist destination's attractiveness through answering a range of questions. In particular, consumers voiced the characteristics of restaurants which are important to them and why. Consumers also discussed how restaurants feature in their travel destination choices. Thus, some favourable and interesting insights into their core motivations were obtained.

While the first two phases of the project have been qualitative (i.e. of an exploratory, information-seeking nature), the final phase will be of a quantitative nature, which means the nature and strength of various relationships can be investigated more extensively. The third phase of the project will build upon the former two phases by incorporating interviewees' comments which appear interesting and progressive. This final phase uses a larger sample of consumers and is therefore intended to provide firmer, more conclusive results.

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APPENDIX A: EXAMPLES OF CONSUMERS' MEANS-ENDS CHAINS

Desire →	*Value* →	*End-state*
• Quality of service	Relaxation	Positive emotions ("makes me feel good")
• Quality of food	Having expectations met	Contentedness
• Cleanliness	Staying safe and healthy	Personal benefit, looking after self
• Quality, value for money	Equality; feeling that people care	Feel comfortable; valued; worthwhile
• Good, friendly service	Respect	Feel comfortable, ("I can enjoy my night")

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The Cooperative Research Centre for Sustainable Tourism was established under the Australian Government's Cooperative Research Centres Program to underpin the development of a dynamic, internationally competitive, and sustainable tourism industry.

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