**Cooperative Research Centre for Sustainable Tourism**
**Work-in-progress report series**

*Delivering strategic knowledge to
enhance the environmental, economic
and social sustainability of tourism*

CRC TOURISM WORK-IN-PROGRESS REPORT SERIES

Restaurants as a Contributor to Tourist Destination Attractiveness

# PHASE ONE: EXPERT INTERVIEWS

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# CRC for Sustainable Tourism

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# *e*xecutive summary

This report forms Phase one of a three-phase project which aims to develop a greater understanding of the contribution of the restaurant sector to a tourist destination's attractiveness. Specifically, this report details the beliefs, opinions and attitudes of leading Australian experts in the food, wine and tourism industries. Phase two and three of the project will extend this first phase by investigating and comparing consumers' perceptions. The outcomes of this project will benefit overall tourism in Australia, as well as the restaurant industry.

The restaurant sector reflects strong growth; mirrors Australia's multi-cultural history; and evidences an exciting development of interest by consumers in visiting a destination for culinary experiences. However, consumers are not the only ones becoming increasingly interested in cuisine; various tourism bodies and the media are also displaying increasing coverage and attention. A review of the State tourism authorities reveal that most states have strategic food and wine plans in place, which indicates the growing interest in the development and marketing of culinary and wine tourism.

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. This research investigates when and how restaurants form an important dimension of the tourism product; which segments of the tourist market are attracted by restaurant culture; and the overall contribution restaurant culture makes to a tourist destination.

Twenty-two experts from the food, wine, tourism and journalism fields were contacted across Australia for the purposes of this study. Semi-structured telephone interviews were undertaken in order to gather timely and in-depth information on the topic. The interview transcripts were analysed, revealing seven major categories with a range of sub-themes emerging.

# 1. Destinational aspects

The first category of interviewee comments revolved around what aspects are important in tourists' selection of a destination. The most common destinational aspect voiced by the participants was 'experiences'. That is, the appeal of new, varied, unique or different experiences was seen as a prominent feature in tourists' selection processes of a destination. The general sentiment was that food and wine contributed to a larger overall experience for tourists.

# 2. Restaurants

The second category of interviewees' comments focused more specifically on restaurants and was further divided into five subcategories. An interesting finding was that while most interviewees believed restaurants were merely secondary in attracting tourists to a destination, their opinions seemed to change through the course of the interviews to re-consider that restaurants have quite an important part to play. Restaurants were also perceived as important to tourists' overall satisfaction with a destination and as a significant dimension of the tourism product. The effect of restaurants on tourist behaviour was examined and differing opinions were uncovered. Similarly, a range of descriptions were given to explain the different types of restaurant cultures in Australia. These explanations were linked to lifestyle, life stages and demographics.

# 3. Trends

An interesting variety of trends were revealed when participants' opinions were sought on the growth of tourist interest in restaurants. The experts identified several consumer trends, ranging from a global increase in consumers' education, awareness and sophistication, to a general capacity to eat out more. They also spoke of a corresponding industry growth, which included the rising media exposure of cuisine and the increased focus on local, regional produce. Recent tourism trends included wine tourism and culinary tourism, and an emerging interest in Australia as a food destination was also argued to be a rising development.

# 4. Image

Participants appeared quite adamant that restaurants had a part to play in the image of a destination. For example, one expert believed "We've been given the image now of being a food-lover's paradise." This report also sought to specifically identify how restaurants add to a destination's image. Answers to this question included the perception that restaurants boost the tourism product, and add to the image through culture, lifestyle and by being unique.

# 5. Market

Six major markets were identified. The most important market segments were the higher socio-economic (AB) market, the young market and the local market. The factors involved in marketing restaurant attractiveness were wide-ranging, as were the challenges and issues. Most interviewees believed in marketing a combination of factors to offer the visitor a total experience, while the main challenge was maintaining consistency in an ever-changing industry.

# 6. Festivals/events

Additional questions were asked of the Destination Marketers and Festival Co-ordinators in order to gain some understanding of the nature and growth of food and wine festivals and events. Interviewees expressed their perceptions of the growing popularity of these events, as well as some concerns relating to the ongoing success of some festivals. Participants also discussed the close link to restaurants and the ability of various food and wine events to alter and enhance the image of a destination.

# 7. Food destinations

The final category of comments included the identification of several destinations which were mentioned by the interviewees as being known for their cuisine or restaurants. Melbourne was mentioned the most along with certain overseas destinations (e.g. Hong Kong, Italy, Paris). Sydney, Adelaide and some regional areas were also mentioned. Some healthy competition seemed to emerge between the city dwellers of Melbourne and Sydney, with both competitors selling the virtue of their favoured city.

In summary, this report shows how important the restaurant industry is in the development and maintenance of a tourist destination's image. It illustrates the growing popularity of regional produce in restaurants; the increased emphasis by tourism authorities on restaurants and food as an attractive element of the tourism product; and the world-wide recognition of Australia as a gastronomic destination. It demonstrates the need for more research into consumer segments and the need for successful collaboration between the related food and wine industries.

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# chapter one

## Introduction

The destination mix of the tourism product is made up of a variety of sub-products, including natural attractions, built attractions, accommodation, entertainment, retailing and restaurants. Each one of these components may contribute to a destination's attractiveness and influence consumer choice when selecting a holiday. This research seeks to develop a greater understanding of the potential contribution of the restaurant sector to a tourist destination's attractiveness. It specifically investigates when and how restaurants actually form an important dimension of the tourism product; how the quality, style and variety of the restaurants contribute to the destination's image; which segments of the tourist market are attracted by restaurant culture; and the overall contribution restaurant culture makes to a tourist destination.

The investigation will take part in three stages. Stage one reports on the beliefs, opinions and attitudes of leading Australian experts in the food, wine and tourism industries. Stage two will obtain similar information, but from the consumer's perspective. Stage three uses the information acquired from the consumer interviews to construct a questionnaire which will be analysed using samples of consumers along the eastern seaboard of Australia. The report that follows is the culmination of Stage one; it describes in detail the results of the expert interviews.

### Background

*"During the 1990's food and wine tourism has emerged as a growth market in the portfolio of Australian lifestyle tourism products. A growing consumer interest in food and wine generally, and particularly in unique regional cuisine, has given rise to a number of opportunities for industry operators in the food, wine and tourism sectors to join forces to consider becoming involved in this specialist tourism market"* (Fontane, 2000: p. 4).

The restaurant industry in Australia had just over 19 500 establishments as at September 1997 (ABS, 1998). The industry has continued to grow in the 1990s, with tourist destinations such as the Gold Coast reflecting a strong growth pattern from 386 restaurants in 1994 to 596 restaurants in 1997 (ABS, 1998). Australia's restaurant industry has developed

into an eclectic combination of Asian, French, Greek, Italian and 'fusion' restaurants (see Sparks, Tomlijenovic, Collie & Morey, 1998), with an increase in 'precinct' dining and a sense of restaurant culture. The restaurant sector not only mirrors Australia's history but evidences an exciting development of interest by consumers in visiting a destination for culinary experiences.

Certain Australian destinations are making a name for themselves on the world market as culinary destinations. For example, Sydney has been voted most favourite city to visit by Conde Nast Traveller magazine subscribers, for the past five years running (Wallace, 1999). In 1999, subscribers gave Sydney's restaurants a rating of 80.5 out of 100. A leading newspaper in the United States also featured Sydney as being one of the world's leading gastronomic food destinations, alongside London, Paris and New York (Apple, 1999). Similarly, Melbourne and Adelaide have long-standing reputations of high-style dining experiences, and these cities are being featured in overseas press as well (see e.g. Santich, 1996). However, restaurants are not the only attraction for consumers interested in a culinary experience. Australian wines have earned global respect, and Apple (1998) believes Australian cheeses are beginning to do the same.

It is not only consumers who are becoming increasingly interested in cuisine. The tourism industry appears to be displaying a more concerted effort in marketing, developing and promoting a region's restaurants, food and wine as part of the tourism product. Both State and National tourism bodies are establishing strategies specific to food and wine, and leading industries are joining together to further promote and enhance the tourist experience. As Mossop (2000) notes, this was not always the case:

> "Dining as a tourism feature seems to have been largely ignored over the years, the premise seemingly that as every visitor has to eat anyway, tourists will find whatever it is they want. It's an attitude which, happily, is changing." (p. 24).

Although food and wine are now acknowledged as an important dimension of the tourism industry, very 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. Similarly, popular magazines such as Australian Gourmet Traveller often review tourist destinations on the quality of restaurants (see, for example, January 1999).

This trend is evident in the marketing of many international destinations. For instance, New York's Convention and Visitor Bureau recently mounted a campaign to promote New York as a destination where tourists will find some of the best restaurants in the world (Prewitt, 1998). The Bureau has elevated the restaurant community as a main driver behind the city's tourism growth. Other cities and associations have also seen the value of restaurants in tourism marketing. In the US, the National Restaurant Association has teamed with the Department of Commerce to make 1999 the Year of the Restaurant, thus marketing the importance of restaurants to tourists (Van Houten, 1999).

Other recent trends in the restaurant sector include: a) an increase in the use of celebrity chefs; b) everyday dining - restaurants are no longer reserved for special occasions; c) a change in atmosphere, which reflects cleanliness and speed, and d) the emphasis of design over food (Hing, McCabe, Lewis & Leiper, 1998; Rogers, 2000). 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 et. al, 1998: p. 269).

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. According to Roy Morgan Research (2000), two value segments which make up a large part of the dining experience are the "visible achievers" and the "socially aware". Visible achievers are successful and satisfied with their life and in their career; they value individualism and quality of experiences. Socially awares are those people who are community minded and socially active; they are attracted to innovation and the seeking of information. A contribution of this report is to determine which segments experts think are likely to be influenced by restaurant culture in making their destination choice. In subsequent research, both the Australian domestic market and the inbound United States market will be investigated as part of this overall project. Within these broad populations, specific segments will be identified and evaluated.

# chapter two

## *Information sources regarding food, wine and restaurants*

Information surrounding the food, wine and restaurant industries (as they relate to the tourism industry) has been gleaned from three major areas: the media, national and state tourism authorities, and websites. The volume of information available indicates a growth of interest in food and wine, and this has lead to several new developments and marketing opportunities.

## The media

The increased attention on food, wine and restaurants is apparent in all areas of the media. Newspapers, magazines, books and television programs all play a role in cultivating and manifesting this interest. Most Australian newspapers have supplement food and wine sections, featuring restaurant reviews, upcoming events, recipes, interviews with well-known chefs and evaluations of holiday destinations according to cuisine. Newspapers such as The Age and Sydney Morning Herald have even released their own cuisine and restaurant guides, as have certain television stations, like the SBS.

A content analysis of leading Australian newspapers on ABIX (an electronic research tool) revealed most articles report on: a) restaurant developments (i.e. openings, expansions, awards, design); b) restaurants in the context of certain tourist destinations (e.g. Las Vegas, New York, Tuscany, Sydney); c) profiles of well-known restaurateurs; d) restaurant reviews; and e) the cost and quality of food in restaurants.

The sheer number of cook-books, restaurant guides and published magazines is testimony to the fact that people are keenly interested in cuisine. Australia has ten food magazines in total, a number which Ripe (1999) considers market saturation. Magazines such as Australian Table, Vogue and Gourmet Traveller list food and wine festivals and give

information on cooking schools and food and wine websites. Local (Australian) restaurants are reviewed, as are national and international food destinations. Overseas markets have seen a growth as well, with magazines such as Conde Nast Traveller (U.S.A.) and American Gourmet Traveller (U.S.A.) and newspapers like The Sunday Times (U.K.) all meeting the current demand.

Evidence of interest in food and wine tourism is reflected in the establishment of the 'Jaguar Awards for Excellence' in the food and travel industries. These awards were started in 1998 by the Australian Gourmet Traveller and Jaguar Cars, and include a prestigious judging panel including Cherry Ripe (Food Writer and Critic), Neil Perry (Chef and Restaurateur) and Simon Johnson (Purveyor of Quality Foods). These awards recognise three food-related categories: innovation in produce; primary produce; and gastronomic tourism. Examples of winners in the tourism category include Peter Clemenger, mastermind of the Melbourne Food and Wine Festival, and George Biron and Diane Garret, owners of the Sunnybrae Country Restaurant and Cooking School.

Lonely Planet Publications also highlight the increasing interest in food and restaurants by recently releasing two new series centered around food and the dining out experience. The World Food series comprises nine pocket-sized books in total, and is a culinary guide to major destinations around the world. These guides cover everything to do with the experience of eating and drinking in a different culture, including the history and evolution of a country's cuisine. The Out to Eat series is a range of restaurant guides for major cities. Two of Australia's major cities - Sydney and Melbourne - feature in this series. These guides review restaurants, bars and cafes, as well as providing information on dining precincts and various ethnic cuisines. Marketed for "people who live to eat, drink & travel", these series represent a new development in the tourism industry - the growing prominence of the food and wine product.

# National and state tourism authorities

Both state and national tourism authorities have realised the potential growth benefits of highlighting the food and wine product for tourism purposes. Hence, all in some way are involved in the development, marketing and promotion of wine and food, but with varying degrees of interest, planning and co-ordination. Wine regions, strategic documents, industry bodies, regional brochures, festivals, events and wine tours have all been variously developed, as have numerous marketing, promotional, industry and research activities and initiatives.

## New South Wales

New South Wales developed their first strategic food and wine plan in 1996, with the assistance of the Culinary Tourism Advisory Committee (now named the Food and Wine Tourism Advisory Committee) (Tourism NSW, 1999). This plan was designed to bring food and wine into the mainstream of tourism marketing. It also aimed to develop culinary tourism as part of the lifestyle experience. The current Food and Wine plan 2000 (Tourism NSW, 1999) builds on the former, by maintaining a strong regional focus and continuing to foster greater networking between the food, wine, agricultural and tourism industries. The development and promotion of "The Wine and Food trails of NSW" details the wine and food experience in each region, with information on fresh produce, restaurants, dining precincts, wineries, events and scenic routes. The event "Feast of Sydney" similarly showcases the State's best food, wine and dining experiences through a multitude of events for two weeks.

## Victoria

Tourism Victoria's Strategic Business Plan 1997-2001 (Tourism Victoria, 1996) identifies food and wine as one of Victoria's major product strengths; an artifact, perhaps, of the State's advertising campaign where food and wine featured prominently for the past five years. A comprehensive Food and Wine Tourism Development Plan 1998-2001 was then developed which set out key objectives, strategies and performance indicators (Tourism Victoria, 1997). The focus of the food and wine plan is on festivals and events, in particular the Melbourne Food and Wine Festival, as well as developing regional tours and trails. Also planned is the expansion of the role of the Victorian Wineries Tourism Council (VWTC; established in 1993 to develop successful winery tourism in Victoria) to include the development and marketing of culinary tourism in addition to wine tourism.

The publication also labels Melbourne, Victoria's capital city, as "the restaurant capital of Australia". These claims are backed up through the reporting of various statistics and marketing surveys. For instance, the Victorian Regional Travel and Tourism Survey (VRTTS; cited in Tourism Victoria, 1997) shows dining out to be the second most popular activity by domestic travellers to and within Victoria. Visits to Victorian wineries have increased (VRTTS), as have the number of international visitors to wineries (International Visitor Summary; cited in Tourism Victoria, 1997). Certain market segments are also shown to be more attracted to the food and wine experience; namely, the "Visible Achievers", "Socially Aware" and "Look at Me" (Holiday Tracking Survey, Roy Morgan Research Centre). In accordance with the food and wine plan, a number of brochures have been

published, with information on wine regions, food and wine festivals, and restaurants in and around Melbourne. In "Victoria's Wine and Foodlovers Short Breaks 1998-99" (Tourism Victoria), packaged products are promoted to tap into the rising short-break market.

## Queensland

A new brochure by Tourism Queensland (TQ), "A Taste of Queensland", highlights fresh food and menu specialities for various Queensland regions, as well as wineries, favourite eating precincts, events and popular scenic destinations. This brochure forms part of the Queensland Food and Wine Marketing Strategy 1999/2000 (Tourism Queensland, 1999). This strategy was developed in conjunction with Restaurant and Catering Queensland, the Departments of State Development and Primary Industries, restaurants, the media and the wine industry. It reviews the history of the food and wine industries in Queensland and lists the intention to market the Queensland food experience as 'fabulous, fresh, fun and friendly'.

The lack of use of fresh produce and local wines in Queensland restaurants is acknowledged in the strategy and objectives have been established to include more local produce features on restaurant menus. Other objectives include the positioning of the States' food as part of the experience, and the creation and enhancement of partnerships between food-related and tourism industries. It will be interesting to see the gains that TQ make with their newly developed strategy.

## South Australia

South Australia (SA) is known as the "wine state". The South Australian Tourism Commission (SATC) has achieved this position through marketing and promoting the State's numerous wineries, wine regions, restaurants and events. The South Australian Tourism Plan 1996-2001 encompasses twenty major tourism sectors or activities - food, wine and festivals are three of the sectors - and lists objectives and strategies to further develop and promote these areas. The plan also outlines a positioning strategy of SA being 'surprisingly different' and a branding strategy based on the five human senses and a sensory experience.

The South Australian Wine Tourism Council was set up in 1996 and is the State's main wine tourism developer. Other developments include the hosting of an international wine expo, the building of national wine centres and the implementation of a Winery Tourism category in the State Tourism Awards structure (Macionis, 1998). The SATC have published a variety of brochures, including "Wine and Food Touring Guide", which tends to accentuate wine more than cuisine, yet which boasts of multicultural restaurants, talented chefs and the use of quality local produce. Other brochures include a "Calendar of Events" and a "Dining Adelaide" guide.

## Tasmania

Tourism Tasmania has recently released a comprehensive draft discussion paper titled "Food and Wine Tourism in Tasmania" which will ultimately be developed into the State's food and wine tourism strategy (Fontane, 2000). The paper brings together information from key industry sectors to identify the current food and wine situation and market trends, and to explore issues and opportunities in the food and wine industries. Key areas are also identified in the paper, such as the need for more research, the significance of training and education, and the encouraging of co-operative partnerships in regional areas. Tasmania's long-standing reputation of a clean, green environment with quality, disease-free produce is focused upon as a competitive advantage. Unique experiences are another focal point, with 'pick your own' produce and farm gate opportunities listed as potential growth areas. As part of their move towards embracing culinary tourism, Tourism Tasmania have released a brochure "Taste Tasmania - Cellar Door & Farm Gate Guide". This brochure highlights seasonal produce, wine regions and trails, and gives information on wineries, farms and other produce businesses.

## Western Australia

Western Australia seems to place more importance on other well-developed, reputable tourism products in favour of the newer culinary tourism product. Natural attractions, adventure tours, safaris and rodeos are given a stronger market focus than wine and food. However, the Western Australian Tourism Commission has recently released the final draft of the Wine Tourism Strategy Western Australia, which notes that Western Australia produces between 10-20 per cent of the country's premium wine. No specific brochures on restaurants, food or wine were able to be located.

## Northern Territory

It appears the potential for food and wine tourism remains underdeveloped in the Northern Territory as well. Little is available in the way of food and wine publications, events and culinary brand imaging, which is surprising given the NT's distinctive cultural feel and local, unique bush delights. Three food and wine festivals were listed in the Australian Tourism Commissions' website, www.aussie.net.au, yet at least two have closed down or been postponed. There appears to be little co-ordination or development of the food and wine product in this territory.

## Canberra

The nation's capital, Canberra, proffers some interest in food and wine tourism. Again, the food and wine product is not seen as a major growth aspect of the tourism

industry, as other products are deemed more important. However, the wine tourism industry is growing, and restaurant, food and wine images are used extensively in Canberra's branding strategies. Brochures, such as "Eating Out in Canberra" and "Celebrate Canberra" are promoted and distributed accordingly.

*Summary*

To summarise, the findings from the review of the State tourism bodies reveal:

· a growing interest in the development, marketing and promotion of food and wine tourism;
· differing levels of development, planning and co-ordination by the States;
· increased interest in regionality, with a focus on local produce; and
· a need for further research.

## Websites

Food, wine and travel websites are as many and varied as the topics they represent. Each State tourism body in Australia as well as the National tourism body, has a website with links to food and wine tourism. Apart from that, a wide assortment of information is available on countries worldwide, including general information, airfares, various deals, tours and specialist travel. Of course, information on restaurants, festivals and local produce exist as well.

General websites give information on a range of travel topics, while specialised websites exist purely to cover restaurants. General sites, such as www.travel.com.au, meld travelling with the culinary experience. The site allows you, among other things, to search a country according to its restaurants and festivals. Sally's Place (www.sallys-place.com) has interesting travel stories which bring together the experiences and enjoyments of travel, food and wine. Recipes are on display as is a dining directory. The Australian Restaurant Guide (www.restaurant.org.au) is a more specialised, online guide to over 4000 Australian restaurants. Best Restaurants of Australia (www.bestrestaurants.com.au) is

another specialised restaurant site; it is a cuisine, wine and entertainment guide which markets itself as "a gourmet's paradise". Restaurant row (www.restaurantrow.com) is a world-wide guide covering 35,000 restaurants in 22 countries. This site provides information on cuisine, ambience and special features.

Even more specialised sites exist, such as the Sushi World Guide (www.sushi.infogate.de) and a world vegetarian guide (www.veg.org/veg/Guide/index.hmtl). A monthly e-zine (electronic magazine) exists in South Australia. Called the FFW - The best of South Australia's Food-Fun-Wine! (www.food-fun-wine.com.au), the on-line magazine gives information on cooking tours, market tours and special education tours. Recipes, restaurants and general food and wine resources exist as well.

## Summary

In conclusion, three major sources were used to collect information on the food, wine and restaurant industries: the media, national and state tourism authorities and websites. As detailed above, 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; products which form part of the lifestyle tourism product. This newer concept of lifestyle tourism accentuates relaxation, indulgence and the combining of experiences. The growing short-break market offers an explanation, in part, of the interest in food and wine. Meanwhile, anything and everything to do with restaurants, wine and food can be found on the information superhighway which is the internet.

The information collected from the three major sources reflect several commonalities. The increased media attention on restaurants and food is in turn reflected in the developments and promotions of the various State tourism bodies as well as in the wealth of information available on the internet. Increased attention in all three areas seems to indicate a general consumer interest in all things culinary. It is also a reflection of the industry's need to keep up with the current demand.

# 3 chapter three

## *What the experts think about food and wine tourism*

### *i* Introduction

Because of this growing interest in food and wine, we sought to interview experts to obtain their opinions and ideas on how they consider restaurants contribute to a tourist destination's image and attractiveness. The expert interviews are Stage one of this research project.

### *m* Method

*Participants*

A purposive sample of 22 leading experts from various tourism, hospitality and journalistic backgrounds agreed to participate in the study. Specifically, nine tourism industry experts, seven food writers/editors, two festival and event experts, one regional council professional, one marketing manager of food guides, one chef and one restaurateur agreed to participate (see Appendix 1). Participants were contacted across Australia, with representatives from every State and Territory. Representatives from each State and Territory tourism authority agreed to participate, except for those from Victoria and the Northern Territory. Every effort was made to obtain an interview with these two tourism authorities, but without success. Participation in the interviews was entirely voluntary, although participants did receive a small gift as a token of appreciation for their support.

*Materials and Procedure*

Semi-structured telephone interviews were conducted with the majority of participants. These interviews took between 30-50 minutes to complete. One face-to-face group interview was also conducted; this interview was completed in 1 hour 40 minutes. All interviews were tape-recorded. It was agreed that interviewees' could be identified in relation to this

report, yet their comments be kept anonymous.

Participants were asked a series of questions with the aim of seeking out their ideas and beliefs of the relative contribution restaurants make to a tourist destination's attractiveness. A set of key questions were asked of each participant, while more specific questions were asked relative to the experts' industry. Interview questions centred around the kinds of roles restaurants play in a tourist destination's image; whether restaurants are important dimensions of the tourism product; recent trends in the restaurant and tourism industries; and the overall contribution restaurant culture makes to a tourist destination.

# Results

Interviews were transcribed then analysed using NUD*IST, a software product designed to assist the process of qualitative data analysis. NUD*IST allows the creation, management and exploration of ideas and categories. Through coding text in various categories, one can clarify ideas, create more distinct categories and discover themes. Thus, with the aid of NUD*IST, eight major categories or themes were discovered within the interviews. Within these major categories, smaller, more discrete groupings were revealed (see Appendix 2). These categories will be discussed separately below.

## 1. Destination Aspects
The first category centered around the question, "What aspects do you think are important in a tourists'

*Table 1*

| DESTINATION ASPECTS: SELECTED QUOTES | | |
|---|---|---|
| **Destination Aspects** | **# Participants Mentioning this Aspect** | **Sample Quotes** |
| Experiences: | 12 | "Um, I think the most important thing is the um, the depth of experiences available, the different types of experiences available in that destination as well as maybe the particular key ones that they may have a special interest in. But it's the whole mix together that actually I think makes one destination particularly attractive over another." <br><br> "I think these days when so many things are homogenised and very much the same experiences can be had everywhere, people are looking to see what is different about this place." <br><br> "There seems to be more and more proof that they're driven by looking for an experience, looking to capture an experience and it's very much more including food than wine." |
| Depends: | 9 | "I think that's a very difficult question actually because it varies depending on the motive for travel. Obviously what the destination has to offer that matches the travellers' need at that time is probably the best way to answer it, and you'd get a difference depending on whether the, it was a short break … compared to a longer break." <br><br> "It totally depends on what the person wants at the time and on the person themselves." |
| Restaurants/food and wine: | 9 | "the food is an integral part of an enjoyable holiday." <br><br> "people are attracted to an area if there's a good restaurant there." <br><br> "they're the link between tourists and locals. They're a showcase for our produce." |
| Cost: | 6 | "the cost, that is the cost of getting there and the I guess the value for money." |
| Safety: | 3 | "well I think they want to know it's safe in all sorts of ways, like a safe destination meaning healthwise …they want to know that um the food is going to be again, safe" |
| Access to information: | 2 | "well, accessibility to information … that's classically not been easy to find. I think, there'll be a tourist link but they're often, touristy, for want of a better word." |
| Geography: | 2 | "it's the geography of the area that decides where I would holiday" |
| Relatives/friends: | 1 | "the other important attributes were to visit with their friends and relatives who live there. That's an important consideration …" |

selection of a destination?" The experts interviewed identified a range of aspects which they perceived as important. These included experiences, restaurants/food and wine, cost, safety, access to information, geography and relatives/friends. Many interviewees said it depends on the tourist. The subcategory 'experiences' is the viewpoint that most participants had; namely, that the appeal of new, varied, unique or different experiences would feature prominently in tourists' selection processes. The subcategory 'depends' refers to experts who believed the attractiveness of certain destinational aspects would change, depending on the tourists' motivation for travel, the length of their holiday, the person themselves and their family situation. Comments regarding restaurants also featured prominently. Table 1 provides sample interview quotes to illustrate each of the perceived important destinational aspects.

## 2. Restaurants

The second category focussed more specifically on restaurants and was divided into five subcategories to correspond with the interview questions. As themes emerged within the subcategories, more groupings were revealed. Each subcategory and grouping will be discussed separately, below.

### 2a. Roles of Restaurants

All participants interviewed believed restaurants have a part to play in a tourist destination's image, yet their beliefs differed according to the magnitude of the role. Some participants - destination marketers, in particular - believed restaurants have only a small part to play, for example:

> "I fear that most people go on a holiday and it's secondary - if they consider the cuisine at all, it's very much a minor, plays a minor part in the selection of the place as a holiday destination."

and

> "If they do, it's a small part at this stage. I don't think people choose to go somewhere based on a restaurant or restaurants, to be honest. But it is one of those um, nice things that add to the holiday."

These comments illustrate that restaurants were perceived as playing a secondary role in a destination's attractiveness. However, while interviewees placed little emphasis on restaurants to begin with, upon reflection restaurants emerged as being quite important. As the following comments show, restaurants may be an under-developed area in relation to the tourism product:

> " ... if that side [restaurants] of the holiday is let down, then it can ruin a holiday."

> "But if the food is excellent and the service is good too, and it just sort of adds to the whole holiday feel. So it's an important role, and it's one that shouldn't be overlooked."

> "... I constantly hear it, that, 'Oh, the food was this, or the food was that' and that marks their holiday enormously. So they might have perfect weather, they might've ... had all those facilities and everything else went wonderfully, but they were really badly fed all week. And while no-one in the family would've said well, that's the main priority - maybe sometimes it's taken for granted - that the food's going to be good. It's a post-mortem reaction, if you like, in some cases, instead of primary."

Six other restaurant roles were also mentioned in the interviews. For instance, some participants viewed restaurants as being part of the overall holiday package, while others viewed restaurants as being a window to the community. Restaurants were also seen as playing a sophisticated role, and health, diversity and showcasing the produce were also mentioned as being roles that restaurants play. Appendix 3 summaries the kinds of roles that restaurants play in a tourist destination's image.

In summary, most interviewees were of the opinion that restaurants were merely secondary in attracting tourists to a destination; other aspects were deemed more important. However, after some deliberation, these interviewees re-considered that restaurants have quite an important part to play. A variety of other restaurant roles were mentioned by participants, and these reflect the diversity of the beliefs and backgrounds of the interviewees.

### 2b. Importance

When asked how important these restaurant roles were, participants overwhelmingly perceived them to be of great importance, as these quotes show:

> "Well it's crucial. If the assumption is - and it seems to be backed up by statistics - that food plays a very important role in people's choice of a destination, the general increased awareness of country food as being more important and being better, will encourage people to go out into the country generally and to specific regions that latch onto regionality. And those that work hard and prove themselves as having good quality food across the board - not just in certain brackets - will have a distinct edge in the tourism market."

> "Well I think that they are very important particularly when it comes down to the quality and service standards that restaurants provide because they fit in with the overall image of the destination. So that plays a pretty big part."

The majority of participants also agreed that restaurants are important to a tourists' overall satisfaction with a destination. As an editor put it: "I think it's extremely important … we aren't going to suggest to people to go somewhere if they have awful food. Um I think it's very important, I would say it's 50% of the package." Similarly, a tourism industry official said: " … food and wine would be right up the top. You can salvage all sorts of horrible experiences with great food, great company and a great experience in a restaurant. It's very difficult to do the reverse." And a restaurateur was quoted as saying: "Well if you ask me, I think it's the ultimate, because I mean I simply don't go anywhere unless I can get really good food and wine."

Restaurants were perceived as being an important part of the tourism product. One tourism expert noted: "They can make or break a holiday in some cases." A food editor noted the unique significance of food in the tourism product by saying:

*"When people are travelling they're going to be eating regardless and if they're going to be eating, they're definitely going to come away with a picture of where they've stayed that is independent of whatever that place might have to offer from a tourist point of view; they will come away with a picture of that place simply from the food alone, because they will have to have three meals a day and um, you know, makes a major impact."*

But what, specifically, is important? Experts believed a range of characteristics were important. Fourteen participants mentioned food and the quality of the food as being critical. As one expert said: "You've certainly got to provide good quality food to be considered seriously as a tourist destination." More specifically, the importance of regional produce was discussed. A food editor and critic was quoted as saying:

*"So it's high quality, local produce. When people go to a region these days, they want to eat what that region's known for. They don't want to drink French wine in the Mornington Peninsula where the wines are beautiful … So they do want it to be regional, um, and they obviously want to feel and immerse themselves in the culture, the local culture, and that's why restaurants are terribly important because they're obvious destinations for that."*

The next most common characteristic was the idea that the whole package is important - " … when you go into a restaurant you go there for an experience, you don't just go there for the food. You go for the whole experience of enjoying the food, enjoying the company, the atmosphere, the service, and it's so important." Eight participants mentioned the value of good staff, while another eight listed special features, such as the location, décor and intangible aspects. With regards to the staff, one food writer felt that "the window to the whole place is the staff who are serving. And if the chef is brilliant and the restaurateur himself or herself is terrific, and they've got sloppy staff … then that presents a dreadful image of a restaurant." Other interviewees mentioned the significance of the chef. One editor believes "The chefs have now become, sort of superstars; some people used to follow a hairdresser around will now follow a chef around." A tourism industry official also noted:

*"We have an enormous record of sales of cookbooks and people are very interested in food and cooking and therefore you can see very easily how the concept of the chef is starting to gain in standing and reputation and being a significant personality to people. It seems to flow quite logically from that interest."*

With regards to the special features of a restaurant, décor was mentioned quite frequently, as was dining precincts. One tourism expert notes: "The evidence is just staring people in the face - to get a good cluster of restaurants together in particular parts of big cities or even smaller cities, rather than ah, possibly costing each other business, it actually helps build the number of visitors that go to the area." Intangibles - such as the ambience, atmosphere or the general excitement a place generates - were also given voice:

*"And I think the other element in it is those intangibles, you know like the special atmosphere of a place, the ah, the energy and buzz that some restaurants have over another. Ambience and location and design of the place and how that works for people."*

Service, or the lack of, was discussed by seven interviewees. For example, one interviewee said: "I just keep coming back to the fact that service in restaurants is so important … it's more a matter of having pride in what you're doing and doing it well." Another interviewee linked the service component to a recovery situation: "It's not hard to provide good service, but it's crucial to a person's experience. And even service can overcome a bad meal in how you handle someone who's not happy." Delivering or meeting customer's expectations was also mentioned, as was the significance of the tourist versus the local. The general consensus was that both are as important as each other.

To summarise:
· the roles restaurants play in a tourist destination's attractiveness were seen to be of great importance;
· restaurants were overwhelmingly perceived as important to a tourists' overall satisfaction with a destination;

*Table 2*

| THE EFFECT OF RESTAURANTS ON TOURIST BEHAVIOUR - SELECTED QUOTES | | |
| --- | --- | --- |
| **Effect of Restaurants** | **# Participants Mentioning this Effect** | **Sample Quotes** |
| Choosing one destination over another: | 11 | "Well, yes, particularly since magazines are now counting restaurants, or including restaurants, in a city's visitability."<br><br>"I think basically people, when they're looking for a holiday destination, they tend to look at the sort of place they want to go to without having a lot of<br><br>regard for the types of restaurants they might find there. The types of cuisine, certainly." |
| Whether tourist would stay longer: | 6 | "Yeah, look, if they had a bad experience, then one could argue that they cut short their stay, or - whether they would stay any longer just because of the restaurants, is questionable at the moment. I'm really not sure about that one. But my gut feeling is, possibly not. Um, it would have to be an absolutely outstanding experience I think for someone to decide 'Oh look, I'll stay another day just because the restaurants are nice.'" |
| Positive word of mouth: | 12 | " … and of course no destination as a destination generally can survive without good word of mouth promotion. It doesn't really matter how much money we spend on destination promotion, the majority of people who are coming here are coming here because somebody else told them of the experience."<br><br>"The best way of ever learning about a place is word of mouth. The more visitors to Australia who have had a good time and go back, well there's another 50 for each one who will hear about it." |
| Depends: | 7 | "I guess it depends on the type of people and why they're travelling … If they are people who are highly involved in the food industry, then yes, I think it'd be a big deciding factor for them. But for the general traveller, say if they're going to visit a destination to explore or discover, then no, I don't think it plays a very big part." |

· restaurants were also perceived as significant dimensions of the tourism product, and
· several specific characteristics were mentioned - such as service and regional produce - in answer to what exactly makes a restaurant appealing.

## 2c. Effect of Restaurants on Tourist Behaviour

Participants were asked what effect restaurants had on a tourist's behaviour. Specifically, the research sought to find whether tourists would: a) choose one destination over another; b) stay longer in a destination; and/or c) spread positive word of mouth, because of restaurants. As table 2 shows, the experts interviewed had differing opinions as to whether tourists would choose one

destination over another and whether they would stay longer in a destination because of the restaurants. Most interviewees however, firmly believed in the spreading of word-of-mouth. Still other interviewees were undecided.

## 2d. Growth in Interest in Restaurants, Food and Wine

When participants were asked whether they see a trend in the growth of tourist interest in restaurants, the answer was a resounding 'yes'. As the following comment shows, this participant felt the growth in interest was a world-wide phenomenon:

*"Yes, I'm sure there is globally. I mean, you just have to look at the amount of gastronomic tours that go around the world now, um, by comparison to 10 years ago. You know, cooking tours in Tuscany and there are you know, there are lots of them in Victoria and other parts of Australia and they're certainly happening in Queensland as well."*

Other participants felt the growth in tourist interest was more in food generally, rather than restaurants specifically:

*"I see a growth of tourist interest in food of which restaurants are a part. I think there is a real issue in pulling restaurants out by themselves in this sort of area, because I think probably the area that's changed most …is probably food, and restaurants associated with wineries around the country particularly in regional Australia, that's probably the area of biggest growth."*

Interviewees were then asked how this growth in interest had changed or evolved over the past five-ten years. Consumer, industry, tourism and Australian-cuisine trends are discussed in section three - "Trends".

### 2e. Restaurant Culture

When asked to define restaurant culture, participants seemed to encounter some difficulty. One participant defined restaurant culture in terms of high critical mass of dining establishments, while another made an analogy to theatre: "We know that sitting in a restaurant is like theatre, that we look around and learn so much from how the people there eat and how they run their social group." Most participants commented that the difficulty in defining such a culture was because there were so many different restaurant cultures within Australia. The following comment seems to capture this perception:

*"I think the restaurant culture here in Australia today is very very diverse um, very, it's almost impossible to define, because you have got, you know, people eating out on every level on every day of the week. And I think it's just become part of our way of life in Australia."*

A range of descriptions were then given to explain these different types of restaurant cultures. These explanations were inextricably linked to lifestyle, life stage and demographics. The following comment from a State tourism marketer exemplifies this interpretation:

*"I think there's different cultural groups that are attracted to different restaurants and it's all a function of your lifestyle and your disposable income. And the stage of life you're in - whether you've got a couple of kids with you at the time, or you've got a double-income, no kids ... you know, it all relates to that."*

The types of restaurant cultures that were mentioned most frequently, include: a) the younger market; b) the midlife household market (those whose children have grown up and/or left home); c) the affluent market, with high disposable income, and d) two Roy Morgan value segments, namely the 'socially aware' and 'visible achievers' (see Appendix 4 for sample quotes and explanations). Some participants also identified certain regions with different cultural types. For example, a tourism industry representative differentiated between café culture and restaurant culture. This participant perceived Sydney to have a more relaxed, casual culture (i.e. a café culture), while Melbourne's culture was perceived to lean more towards the refined dining experience (i.e. restaurant culture). Also:

*"Sydney people like what's new. They'll stay with a place for a while, while it's the newest and the one that's the hip place that's in. They might move on to the next one that tries to take that reputation."*

and

*"...people sort of feel that Sydney's got this free-spirited sort of big-city, cosmopolitan type*

*atmosphere you know, and I think a lot of the eating experiences in the inner-city area at least are sort of, they've got a bit of a street buzz to them and people are able to pick and choose where will we go tonight, depending on what type of atmosphere they're seeking, and what type of food they want to have."*

While participants perceived there to be many diverse types of restaurant cultures within Australia, some generalisations were made regarding the cultures' demographics. Interviewees noted those people who are older, have a fairly high disposable income and are middle to upper-class, are more likely to form a larger part of this restaurant 'culture' than other age, income and class groupings.

Although age was regularly mentioned as a determining factor of restaurant culture, one tourism marketer noted the significance of lifestyle factors, saying: "Age isn't the major factor - it's interest. That you can get a good spread of the same interest across a whole range of age groups." Other interviewees also focused on lifestyle as a decisive factor. The following comments illustrate the perception that lifestyle - how a person lives, what their responsibilities are, what motivates them - is a strong determinant of restaurant culture:

*"I really think it's the same thing that drives people in their place of residence, that drives them in a destination. Because you know, you've got a couple with a family - they're going to choose self-contained and they're going to go out and do the Woolies thing. They may choose to go out and have a couple of meals out just because they're on holidays. And then the high income, professional couple who eat out five times a week - well, they're probably going to eat out seven times while they're on holiday because it follows their lifestyle."*

*"Lifestyle's usually fairly affluent, fairly upwardly mobile, that's why there's a keen interest in food, just like there's a keen interest in homewares and fashion. So it's keeping up with trends, it's also being in the know ..."*

To gain an understanding of the overall contribution restaurant culture makes to a destination, participants were asked to give a rating between 0 and 100. For the general tourist, participants' ratings ranged from 20% to 80%. The mean percentage was roughly 50% (48.93); this was also the most common rating given. For "foodie-type" people, the estimates were as high as 98%. Some participants noted that the rating they give would vary depending on the destination. Another participant said that while restaurants don't feature in a tourists' choice of a destination, they do play a part once a person is in that destination:

*"... having said they don't play any part probably in the decision, I think once people are there, I think it's, having arrived at a destination, I think it plays a big part. I think it probably plays, certainly on the high side of 50, maybe 60%."*

In summary, a range of descriptions were given to define restaurant culture within Australia. Participants generally agreed that different market groups make up different cultures. Descriptions were based on a person's lifestyle, their age, income, class stature, and their life stage. While age was a defining characteristic of restaurant culture, even more significant was the cultures' psychographic underpinnings - their lifestyle, attitudes and motivations. Two Roy Morgan value segments - the visible achievers and socially aware - were mentioned as major contributors of this culture (see Appendix 4). With an average rating of 50%, participants felt restaurant culture substantially contributed to a tourists' overall satisfaction with a destination.

### 3. Trends

Participants' opinions were sought on the growth of tourist interest in restaurants, and how this growth had changed or evolved over the past five-ten years. An interesting variety of trends were revealed. Not only did participants see a growth in interest by tourists, they also spoke of industry growth, recent tourism trends and an emerging interest in Australia as a food destination. These sub-categories are examined below.

### Consumer Trends

Seven consumer trends were identified through-out the expert interviews. Mentioned by the majority of experts was an increase in tourists' expectations, awareness and interest in cuisine and dining experiences. As one tourism expert said: "People are becoming much more savvy about food in general … they're interested in having a food and wine experience." This interest was seen as a world-wide phenomenon. When asked how long this trend had been around for, responses varied. Participants believed the interest in food had been around for as long as 15 years, while interest in food and wine festivals was estimated at 10 years. The trend itself was seen to be fairly recent - approximately two to three years old.

Participants' responses also varied when asked why this trend had emerged. Some participants believed it was consumer-driven, others believed it was industry-driven, and still others believed it was both consumer and industry-driven. The following quote sums up these perceptions:

*"I think that generally speaking, the Australian population is really and truly in love with food and wine and that has evolved over a few years. That is because of where we are today - we are now producing some of the finest food in the world,*

*some of the finest wine in the world, at wonderfully cheap good prices; we now have some of the finest young chefs in the world, we have a great multi-cultural society that adds great depth and flavour to our food."*

Other explanations included: a) an increase in people's travelling experiences, which in turn increased their willingness to try different foods; b) multiculturalism: migrants brought with them new and different types of cuisines, and c) the concept of regionality. For example, one expert said:

*"...the number of tourists attending restaurants is growing as well, as long as that restaurant is talking regional food and wine. The restaurants promote in their restaurant the quality of a destination's image and also the character and the strength of that region; they therefore add to it."*

Another trend mentioned regularly was that of increased sophistication. More specifically, interviewees believed consumers' tastes were becoming more sophisticated. For example, a State tourism expert believes:

*"...we've got an increasing sophistication of visitors coming to these destinations - they've seen it all before. Club Med is the McDonaldisation of a holiday experience. People are no longer looking for McDonaldisation of a holiday experience. They want something which delivers out of the box. We're experiencing an increasing sophistication. People want more choices. They know what is available in other places, they're aware of other opportunities, I think."*

Other consumer trends included:
· Consumers eat out more;
· Consumers are more educated;
· Eating as a meaningful part of a consumers' lifestyle, as opposed to mere sustenance;
· Consumers are beginning to tip more, and are more intolerant of bad service, and
· The consumer population is aging.

Selected quotes of these trends can be viewed in Appendix 5.

### Industry Trends

Seven industry trends were distinguished in the interviews. These were:
· Industry growth - restaurants, food and wine festivals and events, wineries and increased interest from industry bodies;
· Increased media exposure and interest in food, wine, restaurants and gastronomic destinations;

· It's not just the food, the trend is to concentrate on other aspects of the dining experience, such as design elements and the restaurant's ambience;
· Restaurants and the food and wine experience is becoming a global experience;
· Increased focus on local produce and regional cuisine;
· Increase in short-break holidays, which are related to the food and wine experience, as well as relaxation and indulgent experiences, and
· A move towards better training and management of staff and their needs.

Three of these trends were mentioned with regularity, which is an indication, perhaps, of their importance. One such trend was for industry growth. This growth was seen in all aspects of the food industry, from restaurants to food and wine festivals and events to wineries. In conjunction with the trend for industry growth was an increased interest from leading industry bodies. For example, one expert believes "there's more government interest in cuisine and I think a realisation that cuisine is important in the destination."

Matching the industry's increasing interest was the concentration of food, wine and restaurants in Australia's media. "Our media is now swamped with good food and fine dining type experiences" was a sentiment echoed by many of the experts interviewed. Participants noted the overseas media - particularly England's and America's - as displaying an interest in Australia's culinary exhibits also. The following quote shows just how important food writers can be to the success of a destination:

*"...people are very much influenced by a destination by what sort of food they know they're going to get there. I mean, we know if we write something about a destination and someone goes there and they don't like the food, we get letters by the landslide, saying ... how can we recommend a destination if it doesn't have quality food. So I mean, we see it immediately in that if we recommend a place, it's given almost, that the food is going to be good as well. It's very powerful."*

The third leading industry trend which deserves a mention was the idea that 'it's not just the food'. Participants noted a tendency for both consumers and restaurateurs to focus on other aspects of the dining experience instead or, or in addition to, the cuisine. These aspects included design elements, ambience and location, and were thought to enhance the restaurant experience. Eating out was seen as more than the food - the trend was seen by these participants as a total experience. This tourism expert sums up this attitude:

*"...there's this sort of a thing of the theatre of going out to restaurants where it's not just about the*

*eating, it's about having a whole experience. And the amount of money that's being spent on design and creating a mood and an atmosphere is actually taking it beyond the food alone."*

*The following food writer takes it a step further, by saying:*
*"...restaurants have become big business, they're not eating houses anymore. They're owned by conglomerates, and they make huge money ... They're real scenes, they're where people go to relax and do business, to impress each other. They're status symbols just like handbags or shoes or fashion items. You know, 'I eat in so-and-so', 'I go to so-and-so three times a week', so they're very much a status symbol as well. Restaurants have almost become a new possession. It's not just the little local down the road, but you know the chef - chefs are very fashionable - what you know about it. It's almost not considered sort-of, you're almost considered a bit odd if you don't know a bit about the local restaurant scene these days. It's gotten away from it being a very closed little food society to being everybody reads food pages and everybody is a little bit up on food and recipes. Recipe books have stopped being uncolourful, dull, sort-of recantments of fact - you know, of just recipes - and become coffee-table books. They've replaced travel books, big glossy pictures and impossible recipes. But people still buy - nobody cooks out of them - they all go to the restaurants. But they like to have them on their coffee tables, and they love flipping through them."*

Quotes illustrative of the other industry trends can be viewed in Appendix 6.

### Tourism Trends

Two themes emerged within this category - wine tourism and culinary tourism. Some interviewees were of the opinion that restaurants were key aspects of wine tourism, while others believed restaurants were complementary. Interviewees tended to describe culinary tourism in terms of regionality and of highlighting or showcasing a region's local produce, in order to attract tourists to a particular destination. A restaurateur described culinary tourism as "using anything that you have in your region that relates to food and wine, to bring tourists into that particular region or add to the tourists' complete experience."

Restaurants, farm gate tourism, regional produce and cuisine itself was seen by interviewees as an exciting new development within the tourism industry. As one tourism industry official said:

*"Everyone's talking about it ... how the food and wine of Australia is becoming an increasingly important part of our positioning and marketing and the expectations of visitors and the excitement they have about visiting the country."*

### Australia as a Food Destination

Another exciting new development is the growing recognition that Australia is becoming known as a major food destination. In the words of one food writer, "It started happening in the early 90s and it's galloping now. Australia's widely acknowledged as one of the most exciting food destinations in the world." Interviewees say this acknowledgement is due to increasing recognition in the media - "I certainly have noticed in the British press a much greater concentration on food as being a reason to visit Australia"; better standards of service and quality - "… new restaurants open up all the time, standards are increasing, so the bar is being raised all the time"; and the introduction of local produce features on the menu - "regionality is actually leading the pack" - "a good restaurant that is showcasing the produce of the town  can only add to the success of that town."

There is also a rising acknowledgement of what constitutes modern Australian cuisine and what a modern Australian restaurant is. The fact that Australia is coming into its' own in terms of its' style of cuisine is also seen by some interviewees as part of the reason why Australia is seen as a leading gastronomic destination. So what exactly is modern Australian cuisine, and what is a modern Australian restaurant?

*"And I try to explain to them, that we've all grown up using chopsticks, so there's likely to be an Asian component to it. The climate here is so pleasant that there's likely to be a lot of life and open-air dining experience and a casual dining experience. Australians are pretty democratic, friendly people, so it won't be very formal, it will be a very good friendly service, not rigid, and we're all - because of our Italian and Greek and Turkish migrants and what we've got up with, post second World War - we also have a real Mediterranean feeling to our food and that's also influenced by the climate and so, it's that mix - casual, Asian, Mediterranean ..."*

In summary, the expert interviews revealed an interesting and diverse array of trends. Participants identified seven consumer trends, ranging from a global increase in consumers' awareness and sophistication, to a general capacity for consumers to eat out more. Analogous to this growth in interest by tourists, was the subsequent growth in food-related industries. A number of industry trends were made known, including the rising media exposure of all things culinary and the increased focus on local, regional produce.  Recent tourism trends

included wine tourism and its' offshoot, culinary tourism. Interest in Australia - gastronomically and as a food destination - was also shown by those interviewed to be a rising trend.

### 4. Image

This report first sought to identify whether participants believed restaurants had a part to play in the image of a destination. On every level, participants appeared quite adamant that this was the case. For example, one expert believes: "We've been given the image now of being a food-lover's paradise." As an adjunct to that, we wanted to specifically identify how restaurants add to a destination's image. Answers to this question centred mainly around the notion that restaurants boost the tourism product, or add to it through branding, thus giving the destination a positive image. Tourists' perceptions about a destination were also considered important, as this was seen as a degree of the success of destination marketers and developers. Restaurants were also seen as adding to a destination's image through their own large reputations, through that destination's culture, by adding variety, being unique and through the associated relaxing and indulgent lifestyle. Table 3 gives some examples of how participants thought restaurants add to a destination's image.

### 5. Market

Participants were asked a range of questions relating to: 1) which segment of the market they thought restaurants were being marketed to; 2) the factors involved in marketing restaurant attractiveness to tourists, and 3) whether there were any issues or challenges in marketing restaurants to tourists. Destination marketers were additionally asked whether their respective tourism authorities marketed restaurants to tourists, and whether they perceived their marketing strategies had been effective. The answers to these questions are reported below.

### Segments Attracted to Restaurants

The interviews revealed six market segments were attracted to restaurants: the higher socio-economic stratum (AB); mass; local; young; international and gay markets. The market which came up most frequently (mentioned by 10 interviewees) was the AB market - the higher socio-economic group. This market was seen as more likely to enjoy  regular dining experiences because they were affluent and had higher disposable incomes. Participants related their perceptions of the AB market to the Roy Morgan value segments, the 'visible achievers' and 'socially awares'. However, nearly just as many interviewees thought there were such a diversity of restaurants within Australia that restaurants were being marketed to the masses. In the words of one expert: "There's different markets and different restaurants for different people."  Another major market was the locals.

*Table 3*

| HOW RESTAURANTS ADD TO A DESTINATION'S IMAGE - SELECTED QUOTES | | |
|---|---|---|
| **Restaurants - Image** | **# Participants Mentioning** | **Sample Quotes** |
| Boost or brand | 10 | "Yeah, I think definitely that restaurants and food generally has a part to play in the image of a place. I mean, if a destination's able to market strong [food and wine] experiences being available in that area, well I think that adds to the value of the destination in people's minds." |
| Perception | 4 | "But the perception - and that's a key thing in all of this - perception - is that Melbourne is the place for restaurants." |
| Big reputation | 3 | "There are a few restaurants that I'm aware of, that have a real name internationally, and I guess that's another area we're moving into" |
| | | "Some places where you've got an incredibly high profile restaurant, will do a lot to add to a destination's image." |
| Through culture Variety | 3 2 | "It contributes to our image of being a sophisticated, cultural, artistic type of environment." "It's called variety, it's all about the variety of different eating experiences, and eating levels as well, by that I mean different economic levels." |
| Being unique | 2 | "They (different regions) have a very distinct kind of feel. You can actually - it's tangible, their uniqueness …" |
| Lifestyle | 1 | "One of the interesting aspects of the development of the Noosa restaurants and the restaurants on the Sunshine Coast is that those destinations themselves have been taken to using the associated lifestyle image as one of the care limits of their marketing and as such it's become one of the factors that that destination has looked at trying to differentiate itself from its' competitors" |

valuable, though, because they were perceived as having good jobs, high disposable incomes and no children.

One participant highlighted the fact that restaurant use would be minimised in certain life stages. This was true particularly for young families, as "the last thing they're interested in is a quality restaurant." Another participant voiced the opinion that, while restaurants may feature in tourism campaigns, they aren't organised enough to market themselves: "the reality is that most restaurants don't advertise outside of the region. Even within their region, then it's quite limited." The final market which was mentioned in the interviews was the older market. Upon noting the trend towards an aging population, this expert believed the older generation would emerge as a leading market in the near future:

Interviewees stressed the importance of marketing to the locals and maintaining local numbers. One participant claimed "a local following will promote a restaurant", while a food writer was adamant that:

*"...its got to be the locals. No restaurant will ever be good if it's targeted purely at overseas visitors. It just won't work. To be good, a restaurant has to please the locals first, and work with the locals. Because if the visitors don't turn up, they go bust."*

Three other markets which were mentioned were the young market, the international market and the gay market. The international market was mentioned by some participants as one attracted to restaurants, while both the young and gay markets were seen more as emerging markets with potential. Young people were noted as having a certain level of expenditure due to their lack of responsibilities. The gay market was believed to be quite

*"The other area that is emerging as a very very strong socio-economic grouping is the Grey power. In other words, the older people, the retirees. And this is going to have an extraordinary impact on the restaurant industry and the restaurant culture per se, because what will have to happen, is we'll have to start looking at the food that we're serving to these people, their dietary needs and a whole range of things like that."*

### Factors Involved in Marketing Restaurant Attractiveness to Tourists

As table 4 shows, several factors were involved in marketing the attractiveness of restaurants to tourists. First, because participants viewed restaurants as part of the tourist package, the total package was seen as an important marketing factor. Marketing the whole experience was seen as more important than marketing

the restaurants by themselves. As one tourism expert put it: "It's the total experience. You can't cut restaurants out of the destination." Interviewees were also aware of the need to be specific in their marketing strategies. Knowing their target group and being specific in their campaign was a factor used by both magazine editors and destination marketers. In some cases, the produce itself was singled out as a major marketing factor. In other cases, collaboration - partnershipping, different industries working together - was seen as a key strategy. Creating or maintaining an image of restaurants as part of the destination was another marketing factor, as was keeping up with trends and marketing the convenience and accessibility of restaurants. Two participants contended that little is involved in marketing restaurants food and wine to tourists; little work is put into it, or little is done (see Table 4).

*Table 4*

| FACTORS INVOLVED IN MARKETING RESTAURANTS TO TOURISTS - SAMPLE QUOTES | | |
|---|---|---|
| **Factors** | **# Participants Mentioning this Factor** | **Sample Quotes** |
| Total experience | 10 | "Because it's a combination of some of the factors that we're looking at, it's a combination of relaxation, indulgence and discovery and enjoyment. So we want to offer the visitor much more than just one experience when they come here." |
| Be specific | 6 | "By being very focused and targeted. By knowing who we are targeting, not trying to be all things to all people because we can't possibly be." "We have a certain market and the way we go about that is by looking for restaurants that we think our readers would be interested in and then either reviewing them or writing profiles on the Chefs or writing profiles on the actual restaurant itself" |
| Market produce | 5 | "It's quite interesting - the regional food thing - because it's not just about being in the destination, it's about being made aware of the destination, and it's also about a sort of a space in one's mind about where that experience actually is as well" |
| Collaborate | 4 | "There are really passionate energetic people working really hard to bring their food and wine (if they have wine with their food) communities together to work towards producing better produce, having more stuff available in restaurant menus, better range available in shops and to promote what they've got within and outside of their region." |
| Create image | 3 | "It's part of your imaging. A lot of what we put into our brochures has a strong restaurant focus so while you wouldn't necessarily run a magazine campaign focused totally on restaurants you would make sure that all of your promotional material has a fairly strong focus on the quality of the restaurants at the destination." |
| Little is done | 2 | "Well, they don't do very much. There was even a year of food and they didn't get started on it ... they didn't get to starting on the food campaign till June. I think the Tourism Commission pays too little attention to food as a marketing tool." "The great majority of restaurants actually don't live up to tourism at all. They're in malls, they're the local neighbourhood restaurants, they're your diners, that's where they make the money from, the locals." |
| Keep up with trends | 1 | "I think it's important, while there's a trend for regional cuisine, to be on the forefront of that trend. You've got to start serving regional, and have a relationship to that regional cuisine." |
| Convenience | 1 | "Some of it is also convenience because they don't have to go anywhere for good food, they've got it right at their doorstep." |

## Challenges or Issues

The research also sought to identify the issues or challenges in marketing restaurants to tourists. The main challenge marketers believed was delivering on their promise and remaining consistent throughout the ever-changing industry. Some problems were mentioned which were specific to food and wine festivals; namely, that "festivals are notoriously fickle in their success" and that:

> *"Sometimes a festival can run for a while and then because of an element or a change, it finds that perhaps it's becoming no more than a feeding frenzy. So then the Committee has got to go back and reassess that problem."*

Other challenges included competition and maintaining levels of service and quality. General comments from participants included issues such as the GST, restaurateurs remaining passionate about their restaurant and cuisine, and "developing quality eating places,

making businesses viable, helping appropriate businesses and um, particularly rural producers, and establishing more of those links" between industries. See Table 5 for additional examples of these key issues and challenges.

## Have These Marketing Strategies been Effective?

Discussion was entered into with the Destination Marketers as to whether their marketing strategies (those which involved the marketing of restaurants to tourists) had been effective in attracting the tourists. Some participants were sure their strategies had been effective, while others were indifferent. In general, the indifference was related to the belief that restaurants were integrated into the tourism product, and as such, it wasn't possible to delineate the effectiveness of those marketing strategies related to the restaurants as opposed to other tourism aspects. This relative impassiveness suggests the need for more detailed research on the behalf of tourism bodies to more accurately assess the effectiveness of their

*Table 5*

| MARKETING CHALLENGES OR ISSUES - SAMPLE QUOTES | | |
|---|---|---|
| **Challenges / Issues** | **# Participants Mentioning this Response** | **Sample Quotes** |
| Consistency | 7 | "So the challenge is really maintaining consistency - consistent experience is what people are looking for. Value for money doesn't necessarily have to be expensive or quality doesn't necessarily mean sort of silver service, but for what experience a particular restaurant claims to offer, then it ought to be offering a quality experience and a consistent experience in its market niche." |
| General comments | 4 | "There's probably four elements. As I said, understanding what visitors want; providing the product to match their expectations; letting people know about the product, which often we don't do very well - we market the destination without letting them know exactly what they can do there - then providing the quality experience and the quality of service. And then perhaps after that would be word of mouth." <br><br> "And also, at the moment, the total insecurities which the GST has bought and also the Olympics are wreaking havoc on everybody all around Australia." |
| Food and wine festivals | 3 | "Festivals can be a notoriously difficult event to sustain, you know, popularity of a particular festival in one year does not necessarily mean that it is going to be ongoing popular throughout the next 5-10 years." |
| Competition | 2 | "Yes, it's called competition … there's enormous competition from emerging areas." |
| Maintaining service | 2 | "The restaurant industry is a member of the tourism industry, and if we're going out there to give more promotion to restaurants, there has to be a greater emphasis on the service delivery. If you shine more light on the product, then the product has to stand up really well." <br><br> "And people trying constantly to maintain the service and quality standards of the markets are expecting, if they want to remain competitive." |

marketing and promotional strategies as they relate to the restaurant industry.

In summary, participants were questioned on which market segments were attracted to restaurants; the factors involved in marketing restaurants to tourists, and the issues or challenges in marketing restaurants to tourists. Destination marketers were additionally quizzed on the perceived effectiveness of those marketing strategies which were specifically directed at attracting tourists to restaurants. These set of questions revealed that:

- · the major markets attracted to restaurants were the affluent (AB) market, the local market and the mass market (all market segments);
- · emerging markets were the young, gay, and older markets;
- · the main factors involved in marketing restaurants to tourists were an overall approach, and paradoxically, targeting specific markets and being specific in advertising campaigns;
- · making local produce a key factor was also identified;
- · maintaining consistency throughout the changing restaurant industry was the major challenge for destination marketers and for other key players, and
- · an equal number of participants were both sure and unsure as to the effectiveness of their marketing strategies.

## 6. Festivals/Events

Additional questions were asked of the Destination Marketers and Festival Co-ordinators in order to gain some understanding of the nature and growth of food and wine festivals and events in the various regions around Australia. Interviewees felt that the festivals were popular and were growing in popularity. This was reflected in the growth in the number of festivals and in the number of people attending the festivals. While participants generally believed in the popularity of the festivals, some were wary of the hastiness of those towns and regions who held festivals without carrying out the appropriate research to ensure their success. The following comment illustrates this reasoning:

*"There are some figures to suggest that some food and wine festivals in Victoria are not as profitable or successful as what people hope. This is coming specifically from Shires and Councils who need to appease their community, so they try and say 'What can we do' and 'What can we stage to make our community happy and feel good'; that we're using ratepayers money and putting on festivals and events and therefore, but not doing the market research that really shows that their area may not be a food and wine area, it may not be the strength of that town ..."*

Other questions sought to find who goes to the festivals, what's on offer, how long most festivals had been around for, and their relationship to restaurants. Interviewees said most food and wine festivals were between three and 15 years old and predominantly attended by locals. This wasn't seen as a problem though, since "tourists don't want to do what tourists do, they want to do what the locals do." Dominant tourist markets mentioned in the interviews were New Zealand, North America, Europe and some Asian countries. With regards to what was offered at festivals, ethnic culture, music or dance was seen as mixing with the food and wine aspects. Two kinds of festivals were mentioned: 1) the weekend, "plastic-plate" festivals which house a variety of food stalls and drink stands and which are very weather oriented; and 2) "then there's what you'd call the Olympics of food and wine festivals - the real major ones", which run for at least a week and offer a more sophisticated and integrated program, including events such as master classes, scenic tours and special banquets.

Participants felt there was quite a close link between restaurants and food festivals. In most cases, restaurants were seen as showcasing their dishes at the festivals alongside wineries and local producers. The festivals were actually seen by some as beneficial to the restaurant industry, because:

*"They've actually influenced the restaurants into thinking again about [the] relationship to tourism and to visitors ... they've actually helped people meet one another and they've fostered networking and links between producers and restaurants."*

Festivals which were given voice were the Melbourne Food and Wine Festival, Feast of Sydney, the Sydney Morning Herald Good Food Month, Taste of Tasmania, Tasting Australia (a South Australian festival) and Taste of Canberra. The Melbourne Food and Wine Festival was noted for being the most successful and for attracting a higher percentage of tourists than other festivals.

Other events, such as master classes, cooking schools and winery visits, were also noted for their growth both in number and in people attending. The following quote shows how food tours and food markets were used to alter and enhance the image of a destination:

*"Cabramatta is a shining example of where it's an area that had an image problem because there was a lot of media attention focused on the drug issue out there ...[now] Cabramatta is an unbelievably vibrant market place for food and all sorts of Asian experiences that people - it's like, the way they promoted, they got a little brochure out saying 'Sydney's day-trip to Asia' and it's got a fantastic map and gives you a run-*

*down of all the places to visit and how you get there and all the rest of it. So there's an example of where the food side of things - from food produce and dining experiences - has been used to really, I think, in many ways counter and actually alter in a significant way, people's perceptions of a place they might have otherwise been a bit wary of."*

### 7. Food Destinations

Several destinations were mentioned by the interviewees as being known for their cuisine or restaurants. Melbourne was mentioned the most, as were certain overseas destinations, such Hong Kong, Paris and Italy. These were followed by Sydney, Noosa, regional areas (e.g. Barossa Valley, Margaret River, the Riverina), Tasmania and the Southern Downs. Friendly rivalry seemed to emerge between Sydney-siders and Melbournians over which city had the best cuisine and reputation. Both competitors extolled the virtues of their favoured city while proceeding to find fault with the other. For example, Melbournians described the long-standing reputation of Melbourne restaurants as an asset which Sydney can only aspire to. Interviewees from other states also referred to this reputation and were in general agreement with the Melbournians. Sydney-siders on the other hand argued that the recent media exposure showered on Sydney restaurants is more than enough evidence of the city's superiority. A Queenslander pointed out that Melbourne may have to work on retaining its well-earned reputation instead of relying on past successes:

> *"Melbourne tends to live some of its life in the past, in terms of 'we've always had good food, so therefore we must still have it'. Whereas Sydney, I think, in dining terms, Sydney's certainly caught up - if not, passed - Melbourne."*

So there appears to be at least a little competition between the two neighbouring cities, and maybe even a little jealousy from other states. However, the restaurant industry thrives on competition. For most businesses the only way to survive is by lifting their standards and maintaining a consistently high level of quality and service; competition is the crutch which sustains the industry and keeps consumers satisfied.

## Discussion and recommendations

This report investigated the extent of the contribution of restaurant culture to a tourist destination's image. It described the effect of restaurants on tourist behaviour and the growing emphasis on restaurants and cuisine in tourism campaigns. In general, it was found that leading industry experts believed restaurants were significant contributors to both the tourism product and to tourists'

overall satisfaction with a destination. Furthermore, the qualitative analysis of the interviews revealed several interesting and inter-related findings. Below are some key discussion points and recommendations.

- Consumers are becoming increasingly interested in the culinary experiences that can be had in certain destinations. Restaurants, food and wine festivals, wineries, and farm-gate experiences are all examples of the types of experiences that are becoming popular as a result of this consumer interest. Experts see the culinary tourist as one who is affluent, has a high disposable income, and is attracted to the relaxing, indulgent lifestyle.

- This new breed of consumers has cultivated a more intensive and competitive market focus by state, national and international tourism bodies. Nearly all state tourism authorities within Australia have developed integrated plans to highlight food and restaurants in their destination.

- Offshoots of the tourism product in which restaurants feature prominently, are culinary tourism, wine tourism and lifestyle tourism. All three domains are relatively new and reflect an emphasis towards the combining of experiences - namely, relaxation, discovery, indulgence and enjoyment. Those states which choose not to feature food and wine as part of their tourism product are missing out on the opportunity to attract these growing market segments.

- More concerted efforts are starting to emerge by food-related industries to promote Australia's culinary delights and experiences to tourists. Closer relationships may need to be formed between restaurant associations and tourism authorities; restaurants and wineries; restaurants and local producers; and small communities interested in developing their local produce. Thus highlighting the increasing importance of food and wine to the tourism product.

- The promotion of regional produce and the use of regional produce on menus has the ability to create an awareness within the tourism industry of the value of local, distinct foodstuffs. Hence, there needs to be an increasing emphasis by regional tourism authorities on restaurants and food as an attractive element of the tourism product. An integration of local area produce and restaurant menus appears warranted.

- Country areas are beginning to be appreciated by consumers and industries alike, since the revered regional produce is being grown and developed in

the country. This opens up a range of opportunities for areas outside of capital cities to showcase their produce and attract tourists. Those regions that are banding together, developing distinct local produce and building a sense of community are attracting a range of culinary/lifestyle tourists.

*Recommendations*

· There is a need for more research into consumer segments that are attracted by food tourism and how to access these segments. This report obtained information from leading experts regarding their opinions on which market segments were attracted to the restaurant sector. However, the use of a consumer sample would confirm and add to the results of the present study by shedding more light on these valuable segments.

· This report revealed an opinion that there is a need to encourage restaurants to invest in the service training of staff. Results from the present study identified a belief that friendly and consistent service can benefit a destination. This was evidenced in the way local staff (e.g. waiters) can provide information to tourists and the subsequent impact this has on a tourists' satisfaction. More importantly though, was the frequency with which was mentioned situations of service failure and how these incidents can potentially ruin a holiday. These factors highlight the need for restaurants to invest in all aspects of service training of staff.

· Finally, it is recommended that more detailed research on behalf of tourism bodies be undertaken in an effort to accurately assess the effectiveness of their marketing and promotional strategies as they relate to the restaurant industry. When Destination Marketers were questioned on the effectiveness of their marketing strategies, some marketers were unsure whether their strategies were actually effective or not. Specific research in this area might help to assess and possibly fine-tune their various marketing strategies.

# 4 chapter four

## *Conclusion*

This report has described the results of interviews with 22 leading experts in the restaurant, food and tourism industries. It has detailed their beliefs and perceptions and has helped to increase our understanding of the contribution of the restaurant sector to a tourist destination's attractiveness. It has highlighted trends, major market segments, food destinations and the significant relationships between restaurants, consumers and the tourism industry.

In addition, the second and third phases of the project seeks to determine consumers' perceptions of the magnitude of restaurant culture as it relates to the attractiveness of a destination. Subsequent reports will also focus on how the market segment that values restaurants as a component of their destination choice, obtains information about the destination and the restaurants. The outcomes of this study will benefit overall tourism in Australia, as well as the restaurant industry.

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# *a*appendix 1

*Expert Interviews*

*For the purposes of this report, interviews were conducted with the following industry experts:*

1. Bruce Dickson, Product Development Co-ordinator, Tourism New South Wales

2. Marilyn Verheyen, Hallmark Events, Tourism New South Wales

3. Kim Currie, Regional Food and Wine Development Officer, Mudgee Council

4. Mark Olsen, Destination Developer - North Queensland, Tourism Queensland

5. Steve Holle, Destination Developer - Sunshine Coast, Tourism Queensland

6. Margie Brown, Destination Developer - the Outback, Tourism Queensland

7. Kim Payne, Destination Developer - Brisbane, Tourism Queensland

8. Sylvia Johnson, Director, Melbourne Food and Wine Festival

9. Ian Johnson, Interstate Marketing Manager, Western Australian Tourism Commission

10. Fiona Cartwright, Product Co-ordinator for Wine Tourism, South Australia Tourism Commission

11. Graham Chambers, Director of Events, Festivals and Visitors' Services, Canberra Visitor Centre

12. Malcolm Wells, Director of Strategic Projects, Tourism Tasmania

13. Lizzy Loel, Food Critic, Courier Mail

14. Jill Dupleix, Food Editor, Sydney Morning Herald and The Age; Correspondent for Gourmet Traveler U.S.A.

15. Carly Hammond, Marketing Manager, Lonely Planet Publications

16. Judy Sarris, Editor, Australian Table magazine

17. Mietta O'Donnell, Author, Food and Wine Journalist

18. Brian Mossop, Food Writer, Gold Coast Bulletin

19. Kathy Snowball, Food Editor, Australian Gourmet Traveller

20. Cherry Ripe, Author, Food and Wine Columnist, the Australian

21. Peter Howard, Food Editor, Today show

22. Nick Flynn, Executive Chef, Alice Springs Resort

# *a*ppendix 2

**1.DESTINATION ASPECTS**

- Experiences
- Depends
- Restaurant, f&w
- Cost- Safety
- Access to info
- Geography
- Relatives, friends

**2.RESTAURANTS**

Roles

Effect

Importance

Growth interest

Culture

*Roles*

*Overall satis'n*

*What is*

- yes

*Kinds of roles*

- 1 destination over other
- stay longer
- +ve wom
- depends

- lifestyle
- demographics
- types
- 0-100

- Secondary
- Key, subconscious
- Part of package
- Community
- Sophisticated
- Showcase produce
- Health
- Diversity

- food, quality
- whole package
- staff
- other extras
- deliver
- tourist v local

**3.TRENDS**

Tourism

Consumer

Ozfood
Dest'n

Industry

- Modern
Oz food

- sophisticated
- aging
- tips, service
- lifestyle
- *aware/interest*

- *how long*

- *worldwide*

- *why*

- not just food
- media interest
- globalisation
- growth
- train staff
- local produce
- shortbreaks

- eat out more
- educated
- Wine tourism
- Culinary tourism

# *a*appendix 2 cont.

4.IMAGE      5.MARKET      6.FESTIVALS                    7.CULINARY      DESTINATIONS

Segment

Factors          Challenges

Effective?    Plan?

- masses
- ab market        - yes       - no, why
- international    - indifferent  - yes
- young
- not
- local
- gay
- older

- brand, boost      - overall      - consistency    - ink 2 rest.    - Noosa
- perception        - local produce  - work together  - number        - Sydney
- big reputation    -  nothing     - other f&w events - who goes      - Melbourne
- thru culture      - create image  - competition    - time          - Overseas
- variety           - keep up w/ trends - service     - on offer       - Southern Downs
- unique            - be specific   - general        - link 2 accomm'n - Tasmania
- *lifestyle*       - convenience                     - other f&w events - Regional areas
                    - collaborate

- *definition*

# *a*ppendix 3

*The kinds of roles restaurants play in a tourist destination's image*

| TABLE 6 ROLES OF RESTAURANTS - SELECTED QUOTES | | |
|---|---|---|
| **Kinds of Roles** | **# Participants Mentioning this Role** | **Sample Quotes** |
| Secondary: | 7 | "I think for general visitors it's a nice enhancement of a destination but it's not necessarily the primary motivator". |
| Key, subconscious: | 10 | "I do think restaurants have an important part to play in a tourist decision - restaurants make the holiday far more enjoyable." |
| Part of the package: | 9 | "They're part of the package, and unless they're doing their part, then it can let down the whole experience. So it's an important role …"<br><br>"It's the overall experience, not necessarily that my steak was great, but I had a shitty waiter or the other way around. I think it's the overall experience."<br><br>"Well, they play the role of giving the tourist the complete experience. In other words, they do complete the experience. You know, they see all the geographical attractions, they meet the local population and they experience that, they experience everything that has to be had on a peripheral basis. And if that's a great experience, then the role of a restaurant and the role of people involved in the restaurant industry, is to complete the experience, give them the total experience. Because you know, a dud meal can absolutely ruin a wonderful day you know … so I think this is a very important part and a very important aspect for people within the hospitality industry to actually understand." |
| Sense of community: | 4 | " … they have a role of developing a sense of what the place is about by the atmosphere and you know whether, and they also have a role to play in providing people I think in a tourist destination, with a sense of sort of a community in a way." |
| Sophisticated: | 4 | "They add to our image of being a sophisticated, cosmopolitan culture." |
| Showcase produce: | 3 | "Well, I think first of all, they have a role to perhaps showcase the produce of the area that you're in or the city you're in or the state you're in or the country you're in …"<br><br>"What we also are looking at is reinforcing authentic country food, so it's not just the fine dining places that have a role to play but good country food and that means pubs using the regional produce…" |
| Health: | 3 | "There's also a huge health angle as well. People who holiday are not looking to go and eat 3 courses of fatty, rich foods, 3 times a day. They're looking for set places that can properly enhance fresh produce without making it heavy and unacceptable." |
| Diversity: | 2 | "I think it's the diversity of the restaurants here that really does attract the tourist. They can have everything they want and any range - there's Mexican food, Greek, Italian - there's a whole range of ethnic foods." |

# $\mathcal{A}$ppendix 4

*Restaurant culture - the different types*

| TABLE 6 ROLES OF RESTAURANTS - SELECTED QUOTES | |
| --- | --- |
| **Types of Restaurant Culture** | **Sample Quotes** |
| | "Well, there's so many different restaurant cultures. There's the restaurant culture that goes to the expensive restaurants. There's those for families who might go to more market situations or those middle-of-the-road restaurants that have value-for-money food, but at the same time still provide a good experience."<br><br>"There could be a group who are young and who dine out a lot. So that's one restaurant culture and they'd probably go to the popular strips I think, tourist strips. But they'd be looking for cheaper meals but they'd have to be of high quality. And perhaps a little bit quicker. And then there"d be another market who actually, um, there to indulge in the finer things in life. So they"d be the people who seek out the best restaurant in town and they would choose a different type of dish, or a much more curious type of dish."<br><br>"Well I think probably you're looking at the ABC quintile, and they are people who are aware of food, they probably like to cook themselves, they're interested in food, they enjoy having an eating experience out, they're not just going out to feed their faces, they're going out because they want an experience, they're now also well-educated and know what to expect."<br><br>"I think they are probably more likely to be the people that are dual income, probably less likely to have children, more likely to have a higher income, more likely to be socially aware. I think they're probably those who work and play reasonably hard, work long hours, work hard and then reward themselves with indulgent experiences and eating out could be one of those ... probably you'd find that those visible achievers and the socially aware would probably cover about 80% of the restaurant market."<br><br>"The restaurant culture you know, appeals to everybody. I mean, everybody, in their expectations, feels that they can now go out to a café, a brasserie, a bistro, a diner, a take-out area." |

# $\mathcal{A}$appendix 5

*Consumer trends - sample quotes*

| TABLE 8 CONSUMER TRENDS - SAMPLE QUOTES | | |
|---|---|---|
| **Consumer Trends** | **# Participants Mentioning this Trend** | **Sample Quotes** |
| Awareness / interest | 13 | "All the evidence is there in very strong anecdotal terms, that food is very up, it's a foremost factor in people's lives ... So the idea of having a really good experience, food based experience I think is definitely becoming more and more important to people." |
| - why | 12 | "The fact that more people travel these days, means that more people try different foods."<br><br>"The great interest in food and wine came as multiculturalism - it changed through the migrants."<br><br>"I think it's being driven by the food population. Seeing the interest in food has been driven by the chefs, by people like us, you know I think food magazines particularly in Australia have an enormous amount of play in peoples' interest in food, and this type of food they expect to find when they go to a restaurant. You only have to see the growth in the number of food magazines to see how successful and how influential food magazines have been …"<br><br>"I think it's growing world-wide and it comes back again to the fact that so many people travel these days. You know, that broadened everybody's horizons - the fact that people go to different countries and eat different things." |
| - world-wide | 3 | "Our approach to dining has become perhaps - for want of a better word - a little more sophisticated." |
| Sophisticated | 7 | "The general trend in tourism is that people are becoming more sophisticated and more discerning." |
| Eat out more | 5 | "I think so many people do eat out these days, it's become more a way of life than it used to be." |
| Lifestyle v. Sustenance | 4 | "It's become a question of lifestyle opposed to a question of sustenance." |
| Educated | 3 | "You see now people are more educated in food. Many years ago they weren't as educated, they might have been happy if they got their meat and three veg. They weren't used to the whole diversity of food." |
| Tips, service | 2 | "I think Australians are becoming more intolerant of bad service. People in the past may have said "Oh well, that's just the way it's done", but expectations are increasing." |
| Aging | 1 | "The other area that is emerging as a very very strong socio-economic grouping is the Grey power. In other words, the older people, the retirees. And this is going to have an extra-ordinary impact on the restaurant industry and the restaurant culture per se, because what will have to happen, is we'll have to start looking at the food that we're serving to these people, their dietary needs and a whole range of things like that." |

# 𝒜ppendix 6

*Table 9 Industry Trends - Sample Quotes*

| TABLE 6 ROLES OF RESTAURANTS - SELECTED QUOTES | | |
|---|---|---|
| **Industry Trends** | **# Participants Mentioning this Trend** | **Sample Quotes** |
| Growth | 10 | "In the past 5 years, well certainly I've seen more restaurants opening up all over Australia, I think that we've got more restaurants, we've got better food generally, we've got a bigger mix of restaurants, and I think the restaurants are more um, we've come down from that real fine dining ultra-expensive restaurant to a sort of more approachable style of restaurant and more approachable style of food I think." |
| Media interest | 9 | "The media has to know about a restaurant's product, the media has to write about you, we are very persuaded by our media." |
| 'Not just the food' | 8 | "Don't you think the eating experience - it doesn't matter where it is - is only part of it? You know, visiting a restaurant, the experience is more than the food. I mean, it may be just location, it may be the service, it may be the interaction between staff - whether it's the manager or um, the chef who walks around greeting everyone - I think it's more than the food." |
| Globalisation | 4 | "You will find that most of the best restaurants in Australia are probably on the net and can be, they can be found very easily and people can make bookings from overseas instantly on the net. So we are really linked into the whole global eating experience."<br><br>"Australian wine is just a hugely successful, global phenomenon, and anyone who's vaguely interested in wine, um, will come to Australia to look at that. And they do that through restaurants." |
| Local produce | 4 | "I think one of the areas that we are seeing growing is the locally grown produce element, producing local food and elements like that."<br><br>"When people come to an area, they want to know what's grown here. And they want to be able to follow that through generally, too. If they've eaten something in a restaurant, they'd love to be able to go out to the cheese factory or the um, the venison farm, and actually follow that through with visits and in most places, that's a long way from happening." |
| Short-breaks | 2 | "I think what's influencing the holiday market too very strongly at the moment are short stays - short holidays are becoming more the trend …" |
| Staff training | 2 | "There is no doubt that the tourism industry as an industry is increasingly aware of the need to implement training programs to ensure that staff are aware of the expectations that consumers will have and I mean, whilst I think that most of the changes that occur in this industry are largely consumer driven, it is fair to say that … there has been a very strong and continuous recognition of the need to deliver on hospitality and training service in recognition of the importance of that as part of the, big part of the tourism industry." |