RESTAURANTS AS A CONTRIBUTOR TO A TOURIST DESTINATION'S ATTRACTIVENESS
PHASE THREE (PT II) MARKET SEGMENTS

By Beverley Sparks, John Bowen & Stefanie Klag
TECHNICAL REPORTS
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Abstract
This report aims to develop a better understanding of the contribution of the restaurant sector to a tourist destination’s attractiveness. Specifically, this report identifies and describes three types of market segments, the ‘Young Market’, the ‘Affluent Market’, and the ‘Mature Market’, that value culinary experiences, and are influenced in their travel destination choice by the type of culinary prospects a location has to offer. The study explores in detail each segment’s perceptions and opinions in relation to what they value in a restaurant when on holiday and why. Moreover, differences between market segments are investigated in terms of their holiday patterns, the influence of various information sources on tourists’ restaurant choice, as well as motivations and reasons for dining out when on holiday. The report also examines perceptions of restaurants in Brisbane, Sydney, Melbourne, Tasmania, the Gold Coast and the Sunshine Coast, and attempts to gain a better understanding of the influence and role of restaurants in the travel destination choice of respondents from each of the three segments.

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Summary

Over the past decade, Australia’s restaurant industry has experienced a strong growth, with increasing numbers of consumers becoming interested in cuisine and visiting a destination for culinary experiences. Alongside with consumers, various tourism bodies and the media are displaying growing interest in everything culinary as evidenced by increasing media coverage and the development and marketing of food and wine tourism. Despite this rapidly emerging trend, however, little research has been conducted into the nature or the role of restaurant experiences in adding to the tourism product. In order to develop a greater understanding of the restaurant sector to a tourist destination’s image and attractiveness, a three-phase project was undertaken.

Phase One described the beliefs, opinions and attitudes of leading Australian experts in the food, wine and tourism industries (see Sparks, Wildman & Bowen 2000). In contrast, Phase Two explored beliefs, values, and attitudes of consumers in order to determine what they value (in a restaurant and at a holiday destination) and why (see Sparks, Wildman & Bowen 2000). Based on this information, in Phase Three (Part I) of the project a questionnaire was designed to explore consumers’ perceptions, values and opinions in more detail. Topics explored included consumers’ holiday patterns; information sources that tourists typically rely upon when selecting restaurants; restaurant characteristics that are important to consumers; the influence and role of restaurants in consumers’ travel destination choice, as well as perceptions of food and restaurant characteristics in places like Sydney, Melbourne and Tasmania (see Sparks, Bowen & Klag 2001).

Furthermore, researchers were interested to identify market segments that value culinary experiences, and are influenced in their travel destination choice by the type of culinary prospects a location has to offer. For this purpose, a cluster analysis (a statistical technique that aims to group objects based on the characteristics they possess) was conducted on the data collected in Phase Three of the project, resulting in the compilation of the present report that forms Part II of the third and final phase of this project. Results revealed three segments, the ‘Young Market’, the ‘Affluent Market’, and the ‘Mature Market’.

The present report is composed of eight results sections. The first section provides demographic information for each of the three market segments, their holiday pattern, restaurant preferences, and dinner budgets. The “Young Market” consisted of people between 18 and 34 years of age who reported that restaurants were of some to moderate importance when selecting a holiday destination. People in this category had an average income between $30 000 to $50 000 per annum and tended to be either married or single and without children. Due to their lack of responsibility and level of financial expenditure, this segment is considered an emerging market with great potential.

The “Affluent Market” comprised of respondents between 35 and 50 years of age with a disposable income ranging from $30 000 to $130 000 and above. Respondents from this group tended to view restaurants as moderately to very important when selecting a holiday destination. Furthermore, people in this category tended to be married and without children. Due to the ‘Affluent Market’s’ comparatively high disposable income this group represents the segment currently most strongly interested in culinary experiences.

Finally, the ‘Mature Market’ consisted of respondents between 51 and 65+ years, generally married and without dependents. Respondents from this segment typically reported that restaurants were not important when selecting a holiday destination. However, as a result of the global trend towards an aging population, the ‘Mature Market’ represents a market segment with extraordinary potential that waits to be conquered.

With regard to the segments’ holiday and short-break holiday patterns, across all three segments respondents were found to take a vacation once or twice a year for an average of one to two weeks, in the company of their partners, family or friends. Similarly, across all three segments respondents reported to go on short-break holidays at least once a year. While the ‘Young Market’ reported to be accompanied by their family, partner or friends, the ‘Affluent Market’ and the ‘Mature Market’ tended to spend their short-break holidays in the company of their partners.

Looking at the restaurant types typically visited by respondents when on holiday, overall, across all three segments respondents reported to prefer eating at a variety of different restaurants rather than just one particular style. Restaurant types popular to dine at included Asian and Italian restaurants. While the ‘Young Market’ and the ‘Mature Market’ tended to spend between $20 and $40 per adult when dining at a restaurant, the ‘Affluent Market’ spent between $30 and $60.

The second section, ‘Influence of Printed Material’, explored the extent to which respondents from the three market segments were influenced by various types of print media in their choice of restaurant while on holiday. Print media such as restaurant reviews in magazines, local papers, and dining out guides were found to exert their strongest influence on respondents from the ‘Affluent Market’, followed by the ‘Young Market’, with printed material exerting the least influence on the ‘Mature Market’.

The third section, ‘Restaurant Characteristics’, examined the influence of particular restaurant characteristics. While evidence of a wide variety of food on the menu seemed to exercise the strongest influence on the ‘Young Market’s’ restaurant selection, for the ‘Affluent Market’ it was the restaurant’s attractive...
Phase Three (Pt II) Market Segments

atmosphere and décor. In contrast, the ‘Mature Market’ reported the display of a menu in the window as most influential. Furthermore, while the availability of alcoholic beverages was most important to respondents from the ‘Affluent Market’, it was least important to the ‘Mature Market’. In addition, respondents agreed that the proximity of a restaurant to respondents’ accommodation was a major factor influencing their decision process.

The fourth section, ‘Information Sources Used’, investigated the information source(s) respondents from the three segments typically depend upon when selecting restaurants. For the ‘Young Market’ and ‘Mature Market’, the most influential information source entailed ‘wandering around’ looking for a suitable establishment to eat at, while the ‘Affluent Market’ reported to primarily rely on recommendations from local people and business in the area.

The fifth section, ‘Reasons for Eating Out’, looked at tourists’ motivation and reasons for eating out when on holiday. On average, across all three segments, ‘relaxation’ (i.e., to be waited on and not having to cook yourself) and the ‘experience’ (i.e., eating out is part of the overall holiday experience) emerged as the most important reasons for dining at a restaurant. Furthermore, while all three segments agreed on the importance of eating healthy food when on holiday, the ‘Mature Market’ viewed eating healthily as most important.

The sixth section, ‘Perceptions of Food and Restaurant Characteristics’, described respondents’ perceptions of food and restaurant characteristics of six Australian regions (Brisbane, Sydney, Melbourne, Tasmania, the Gold Coast and Sunshine Coast). Specifically, respondents were asked to rate how they perceived the variety of restaurants in each of the six regions, their dining precincts, the overall reputation of the regions’ restaurants, as well as the regional produce they present. Of the six locations, Melbourne was rated most favourably in terms of its restaurant variety, dining precincts and overall reputation, closely followed by Sydney. While the ‘Young Market’ and the ‘Mature Market’ viewed Tasmania as the leader when asked about their perception of the regional produce presented by restaurants in each of the six regions, the ‘Affluent Market’ continued to favour Melbourne.

The seventh section, ‘Return to Destination’, explored whether respondents from the three segments had returned to a holiday destination as a result of their positive restaurant experience. The majority of respondents from the ‘Affluent Market’ reported that they had returned to a destination in order to re-experience and further explore the culinary delights offered by the location(s). In contrast, the majority of respondents from the ‘Young Market’ and, in particular, the ‘Mature Market’ reported that they had never revisited a holiday destination for this reason.

Finally, the last section, ‘Magazines Typically Read’, investigated the types of magazines respondents from the three segments read on a regular basis. Across the three segments, the ‘Affluent Market’ was more likely than respondents from the other two segments to read magazines in general. While Women’s magazines were the most popular among respondents from all three groups, followed by Home & Lifestyle magazines and Food magazines, the ‘Young Market’ was more likely than the other two segments to read Men’s, Motoring, Computing, Sporting and Music magazines.
Chapter 1

Introduction

Over the past ten years, the Australian restaurant industry has experienced an enormous growth, with tourist destinations such as the Gold Coast witnessing an impressive growth pattern from 386 restaurants in 1994 to 596 restaurants in 1997 (ABS 1998). As a result, Australia’s restaurant industry is characterised by an eclectic combination of Asian, European and ‘fusion’ restaurants (see Sparks, Tomljenovic, Collie & Morey 1998), with an increasing number of consumers interested in visiting destinations in order to immerse themselves in culinary delights. For example, Sydney has made a name for itself on the world market as a culinary destination (Apple 1999), just like Melbourne and Adelaide which are being featured in overseas press as destinations with long-standing reputations of high-style dining experiences (see e.g., Sanich 1996). Besides restaurants, Australian wines and cheeses are beginning to attract attention among consumers eager to delve into culinary experiences (Apple 1998). Furthermore, the media and various tourism and industry bodies appear to have become increasingly aware of the need to market, develop and promote the restaurant industry as part of the tourism product. While state and national tourism bodies are developing specific strategies to promote gastronomic experiences as part of the tourist experience, media coverage portraying the quality of destinations’ restaurants is also rapidly increasing. Increased attention of consumers, the media and tourism bodies appears to indicate a growing interest in all things culinary, highlighting the industry’s need to meet the ever increasing demand. 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, in particular, for domestic tourism and short stays. According to Symons (1999), 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 is likely to vary by tourist segment. Therefore, the goal of the current report was to identify existing and potential segments of consumers who value culinary experiences, and are influenced in their holiday destination choice by the type of culinary prospects the location has to offer.
**Chapter 2**

**Method**

**The Questionnaire**

Telephone interviews were conducted by the research team. The interview questionnaire, which was exploratory in nature, consisted of 65 items divided into eight sections, and was designed to obtain detailed information about the relative importance and role restaurants play in tourists’ holiday experiences (see Appendix A for a copy of the interview questionnaire).

The first section was designed to obtain information on respondents’ holiday and short-break holiday patterns. A holiday was defined as one which lasted for a minimum of five nights or more, whereas a short-break holiday was described as an overnight stay for anywhere between one and four nights. Items included the frequency with which respondents took holidays/short-break holidays, the average length of their holidays/short-break holidays, and who accompanied them on their holidays/short-break holidays. Furthermore, there was questioning pertaining to the types of restaurants respondents tend to seek out during their vacations.

The following three sections of the interview questionnaire investigated different information sources tourists may rely upon when choosing restaurants when on holiday.

The second section was designed to measure the extent to which various printed materials influenced consumers’ restaurant choice when on holiday, and included restaurant reviews in food guides, food magazines, local newspapers, and advertisements. Respondents were asked to rate the different types of printed materials on a one to six rating scale, with one signifying no influence at all and six signifying an extreme influence.

The third section explored the extent to which tourists are influenced by certain restaurant characteristics while wandering around clusters of restaurants looking for a place to dine. Items were rated on a one to six rating scale, and investigated restaurant qualities, such as the relative influence of certain display and design characteristics, as well as the attractiveness and ambience of restaurants.

Section four identified the information sources consumers typically rely upon when choosing restaurants when on holiday. A list of eight responses was made available, with respondents able to choose up to three information sources, including items such as ‘Recommendations from local people or business in the area’, ‘Word of mouth recommendations from friend and/or relatives’, and the Internet.

Section five sought to investigate reasons for why tourists eat out when on holiday. Various reasons for eating out were developed, such as ‘indulgence’, ‘relaxation’ and ‘health’, with respondents rating the relative importance of each reason on a one to six rating scale (1 = not important at all; 6 = extremely important).

Section six of the questionnaire explored consumers’ perceptions of food and restaurants for six Australian regions (Brisbane, Sydney, Melbourne, Tasmania, the Gold Coast, and Sunshine Coast). Using a one to ten rating scale (1 = low rating; 10 = high rating), respondents were asked to rate each region according to four restaurant characteristics – the variety of restaurants, dining precincts, the overall reputation of restaurants, and regional produce being featured on restaurants’ menus. In order to prevent any order bias, the Ci3 computer program was set to select destinations in random order.

Section seven was designed to learn about the level of importance that restaurants have in helping respondents choose a holiday destination. Moreover, items also sought to identify the typical amount of money spent on dinner at restaurants and whether respondents’ positive restaurant experiences in a destination had ever influenced them to return to a holiday destination.

Finally, the last section comprised several demographic items including respondents’ life stage, age, marital status, income, and number of dependents.

**Participants**

The sample comprised 459 randomly selected respondents. Participants were obtained from three capital cities along the eastern seaboard of Australia, namely Brisbane (150 respondents), Sydney (152 respondents) and Melbourne (157 respondents). Of the 459 respondents, 170 were males (37%) and 289 were females (63%). In order to qualify for an interview, respondents had to be eighteen years of age, and must have taken some sort of holiday in the last 12 months. Participation in the interviews was entirely voluntary.

**Procedure**

The interview questionnaire was constructed and administered with the aid of Ci3 CATI, a computer program which provides an integrated system for computer assisted interviewing. Prior to data collection, the questionnaire was piloted:

1. to ensure the measures’ readiness for actual data gathering,
2. to confirm that options were exhaustive and mutually exclusive, and
3. for training and preparation purposes.

To warrant a representative sample and to ensure participants’ anonymity, participants from Brisbane, Sydney and Melbourne were randomly selected from the cities’ respective White Pages telephone directory. As the goal was to interview 150 people from each city, the number of pages in each of the cities’ White Pages was divided by 150, which resulted in one respondent being chosen and interviewed from each n-th page of the city’s phone book. In order to capture the range of respondents, interviews were conducted during the day, in the evening until 8pm, and on weekends. Moreover, there were five interviewers of which three were female and two were male.

Each interview commenced with a greeting followed by the interviewer introducing himself/herself, stating the purpose of the study and requesting 10 to 15 minutes of the respondent’s time to conduct the interview, with interviewers refraining from convincing or persuading respondents to take part in the study. Furthermore, respondents were able to terminate the interview at any point in time. Upon completion of the interview, which took an average of 15 minutes, a thank-you message was relayed to participants expressing appreciation for their time and information given.
Chapter 3

Results

A cluster analysis (a statistical technique aimed at grouping objects based on the characteristics they possess) was conducted on the combined data set of Brisbane, Sydney and Melbourne respondents. This approach was chosen over the alternative of clustering each sample separately, as “cuisine lovers” and “gourmet-travellers” represent a relatively small market segment(s) and, therefore, are easier to detect in larger samples.

A hierarchical cluster analysis was performed using the squared Euclidian distance (SED) to establish proximity estimates. Although the most common and preferred method, the use of SED, when employed to obtain proximity measures of variables differing in scales, can lead to distorted results. Therefore, it was decided to standardise the variables, using z scores.

Variables included in the cluster analysis were chosen based on findings from the expert interviews in Phase One of the project linking the restaurant culture to variables such as lifestyle, life stage and demographics, as well as practical considerations. It needs to be pointed out that cluster analysis is an exploratory procedure and that there is no one correct cluster solution (Kent 1999). As cluster analysis can be dramatically affected by the inclusion of even one inappropriate variable (Hair, Anderson, Tatham & Black 1995), various cluster solutions, differing in the combinations of variables employed, were investigated. As a result of extensive exploration, using Discriminant Function Analysis to assess the nature of the differences between clusters and to test these differences for significance, three variables were selected:

1. importance of restaurants (respondents’ ratings for the overall importance of restaurants facilitating the choice of a holiday destination),
2. age, and
3. income.

The solution revealed five clusters. After inspection of each cluster, it was decided to combine three of the clusters into one due to their similarities. As a result of this process, the final solution resulted in the classification of 459 cases into three clusters.

The three clusters were named “Young Market”, “Affluent Market”, and “Mature Market” based on the characters of the members of each cluster. Table 1 gives an overview of the characteristics of each cluster.

<table>
<thead>
<tr>
<th>Table 1: Demographic Trends of Clusters</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age</strong></td>
</tr>
<tr>
<td>18-34 years</td>
</tr>
<tr>
<td>$30,000 - $50,000</td>
</tr>
<tr>
<td>Married/living with partner or single</td>
</tr>
<tr>
<td>Professionals and white collar workers</td>
</tr>
<tr>
<td>No dependents</td>
</tr>
<tr>
<td>Some to moderate importance</td>
</tr>
</tbody>
</table>

Sample Description

Demographics

‘Young Market’

This cluster consisted of 195 young men (42.6%) and women (57.4%) between 18 to 34 years of age for whom restaurants seemed to be of some to moderate importance when selecting a holiday destination. People in this category had a yearly income between $30 000 and $50 000, with some individuals earning up to $70 000 per annum. In Phase One of the project, the ‘Young Market’ was identified as an emerging market with potential, with young people being noted as having a certain level of expenditure due to their lack of responsibilities (see Sparks, Wildman & Bowen 2000).
‘Affluent Market’

This cluster consisted of 167 male (31.7%) and female (68.3%) respondents typically between 35 and 50 years of age. Respondents who belonged to this market segment compared to respondents who belonged to the ‘Young Market’, had a higher disposable income ranging from above $30,000 per annum to $130,000 and more, and tended to view restaurants as moderately to very important when selecting a holiday destination. This cluster can be compared to the AB market (the affluent market – the middle to upper socio-economic group) that was identified by restaurant experts in Phase One of the project as well as with the Roy Morgan value segments of ‘visible achievers’ and ‘socially awares’ (see Sparks, Wildman & Bowen 2000).

‘Mature Market’

A total of 97 respondents belonged to this cluster (females = 64.9%; males = 35.1%). Respondents in this segment tended to report that restaurants were not important when selecting a holiday destination. This group of respondents, typically aged between 51 and 65+ years, appeared to represent the older age group identified in Phase One of the project, and was coined by one of the restaurant experts interviewed as the ‘Grey Power’ (see Sparks, Wildman & Bowen 2000). Considering the global trend towards an aging population, this market segment is believed to emerge as a leading market in the near future.

Holiday & Short-Break Holiday Pattern

Respondents were asked questions pertaining to how often they go on holiday (i.e., overnight stay for five nights or more), the length of their holiday, whether they take a short-break holiday (i.e., overnight stay for anywhere between one and four nights), and who typically accompanies them. Across all three market segments respondents were found to go on holiday an average of once or twice a year. The average holiday was reported to last between one and two weeks, with respondents typically enjoying their vacation in the company of either family or partners, followed by friends. Similarly, across all three segments respondents reported to go on a short-break holiday (a stay between one and four nights) at least once a year. While the ‘Young Market’ reported to go on short-break vacations with their family, followed by their partners and friends, the ‘Affluent Market’ and the ‘Mature Market’ tended to spend their short break holidays in the company of their partners.

Restaurant Preferences

Respondents were asked what kind of restaurant(s) they typically eat at while on holiday.

‘Young Market’

Figure 1: Types of Restaurants the ‘Young Market’ Typically Eats at When on Holiday
(frequency data; n = 197)

<table>
<thead>
<tr>
<th>Restaurant Types</th>
<th>Percentage of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variety</td>
<td>9.6</td>
</tr>
<tr>
<td>Asian</td>
<td>29.1</td>
</tr>
<tr>
<td>Italian</td>
<td>20.4</td>
</tr>
<tr>
<td>Other</td>
<td>17.3</td>
</tr>
<tr>
<td>Pubs/Clubs</td>
<td>15.3</td>
</tr>
<tr>
<td>Fast Food</td>
<td>10.7</td>
</tr>
<tr>
<td>Family Restaurant</td>
<td>10.2</td>
</tr>
<tr>
<td>Coffeeshops/Bistros</td>
<td>10.2</td>
</tr>
<tr>
<td>Seafood</td>
<td>7.6</td>
</tr>
<tr>
<td>Takeaway</td>
<td>7.1</td>
</tr>
</tbody>
</table>

Note: Percentages do not add up to 100% as respondents made multiple responses. For breakdown of the Asian category see Figure 2 and for a breakdown of the “Other” category see Figure 3.

Three hundred and one responses were reported from respondents in the ‘Young Market’ segment. As illustrated in Figure 1, 29.6% of respondents reported that rather than seeking out a particular type of restaurant, they preferred enjoying different types of food at a variety of restaurants when on holiday. In contrast, 29.1% of
the respondents reported to typically visit Asian restaurants. In addition, 20.4% of participants reported to
typically dine at Italian restaurants.
As can be seen from Figure 2, for the 29% of the ‘Young Market’ that typically eat at an Asian restaurant
this figure shows the percent that prefer a specific type of restaurant. The figure clearly shows that Chinese
restaurants were amongst the most popular Asian restaurants.
Furthermore, the “Other” category consists of restaurant types reported by less than 10 respondents. For the
17% of the ‘Young Market’ who reported visiting restaurants in this category, 26.7% reported to seek out
establishments that offer smorgasbords and buffets, followed by 23% that visit steak restaurants.

Figure 2: Asian Type of Restaurants the ‘Young Market’ Typically Eats at When on Holiday
(frequncy data; n = 57)

Note: Percentages are based on the number of respondents who reported to typically eat at Asian restaurants

Figure 3: “Other” Types of Restaurants the ‘Young Market’ Typically Eats at When on Holiday
(frequncy data; n = 30)

Note: Percentages are based on the number of respondents in this category
‘Affluent Market’

Figure 4: Types of Restaurants the ‘Affluent Market’ Typically Eats at When on Holiday
(frequency data, n = 167)

Note: Percentages do not add up to 100% as respondents made multiple responses. For a breakdown of Asian category see Figure 4 and for breakdown of “Other” category see Figure 6

Figure 4 shows that out of a total of 248 responses from respondents belonging to the ‘Affluent Market’, 26.2% of respondents reported to visit a variety of restaurants when on holiday, followed by 14.8% expressing that they typically seek out Asian restaurants, with another 14.8% of respondents stating that they tend to visit Italian restaurants. While, 8% of the participants reported to typically eat at Seafood restaurants, 7.6% preferred to dine at a la carte or fine dining restaurants.

As can be seen from Figure 5, for the 14.8% of ‘Affluent Market’ that typically eat at Asian restaurants this figure shows the percent that prefer a specific type of Asian restaurant. The figure clearly shows that Chinese restaurants were among the most popular of the Asian restaurants for respondents belonging to this segment.

Furthermore, the “Other” category (see Figure 6) consists of restaurant types reported by less than 10 respondents. For the 20.8% of the ‘Young Market’ who reported visiting restaurants in this category, 14.2% reported to visit coffee shops and bistros, with another 14.2% stating to visit family restaurants. Fourteen percent of these respondents reported to visit restaurants that offer smorgasbords/buffets, with another 14% reporting to seeking out restaurants that serve European cuisine.

Figure 5: “Asian” Types of Restaurants the ‘Affluent Market’ Typically Eats at When on Holiday
(frequency data; n = 37)

Note: Percentages are based on the number of respondents who reported typically eating at Asian restaurants
Figure 6: “Other” Types of Restaurants the ‘Affluent Market’ Typically Eats at When on Holiday
(frequency data; n = 49)

![Bar chart showing percentages of different restaurant types for the 'Affluent Market'.]

Note: Percentages are based on the number of respondents in this category

‘Mature Market’

Figure 7: Types of Restaurants the ‘Mature Market’ Typically Eats at When on Holiday
(frequency data; n = 97)

![Bar chart showing percentages of different restaurant types for the 'Mature Market'.]

Note: for breakdown of “Asian” category see Figure 8 and for a breakdown of the “Other” category see Figure 9

Figure 7 illustrates that out of 148 responses from respondents belonging to the ‘Mature Market’, 33.1% of respondents reported to enjoy eating at a variety of different styles of restaurants when on holiday, followed by 29.1% respondents stating that they typically visit Asian restaurants. Twenty-five percent of respondents indicated that they usually dine at clubs or pubs, followed by 12.4% respondents reporting to typically enjoy eating at seafood restaurants.

As can be seen from Figure 8, for 29% of the ‘Mature Market’ that typically eat at an Asian restaurant this figure shows the percent that prefer a specific type of restaurant. Like the ‘Young Market’ and the ‘Affluent Market’, Chinese restaurants also emerged as the most popular type of Asian cuisine among the “Mature Market”. 
Furthermore, the “Other” category (see Figure 9) consists of restaurant types reported by less than 10 respondents. For the 33% of respondents in the ‘Mature Market’ that reported visiting restaurants in this category, 18.7% stated to typically seek out coffee shops and bistros. Interestingly, another 18.7% reported to dine at fast food outlets.

**Figure 8:** Types of “Asian” Restaurants the ‘Mature Market’ Typically Eats at When on Holiday
(frequency data; n = 28)

![Figure 8](chart.png)

Note: Percentages are based on the number of respondents who reported to typically eat at Asian restaurants

**Figure 9:** “Other” Types of Restaurants the ‘Mature Market’ Typically Eats at When on Holiday
(frequency data; n = 32)

![Figure 9](chart2.png)

Note: Percentages are based on the number of respondents in this category
Overview

Table 2: Comparison between Market Segments – Types of Restaurants Respondents from the Three Market Segments Typically Eat at When on Holiday (percentages)

<table>
<thead>
<tr>
<th></th>
<th>Young Market*</th>
<th>Affluent Market*</th>
<th>Mature Market*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n = 197</td>
<td>n = 167</td>
<td>n = 97</td>
</tr>
<tr>
<td></td>
<td>total responses = 301</td>
<td>total responses = 242</td>
<td>total responses = 149</td>
</tr>
<tr>
<td>A La Carte</td>
<td>1.5% (3)</td>
<td>7.8% (19)</td>
<td>2.0% (3)</td>
</tr>
<tr>
<td>Asian</td>
<td>29.1% (57)</td>
<td>15.2% (37)</td>
<td>19.1% (28)</td>
</tr>
<tr>
<td>Australian Cuisine</td>
<td>0.0% (0)</td>
<td>0.0% (0)</td>
<td>0.67% (1)</td>
</tr>
<tr>
<td>Coffeeshop/Bistro</td>
<td>10.2% (20)</td>
<td>2.9% (7)</td>
<td>4.0% (6)</td>
</tr>
<tr>
<td>European</td>
<td>2% (4)</td>
<td>3.3% (8)</td>
<td>2.0% (3)</td>
</tr>
<tr>
<td>Family Restaurants</td>
<td>10.2% (20)</td>
<td>2.9% (7)</td>
<td>2.7% (4)</td>
</tr>
<tr>
<td>Fast Food</td>
<td>10.7% (21)</td>
<td>2.0% (5)</td>
<td>4.0% (6)</td>
</tr>
<tr>
<td>Hotel Restaurants</td>
<td>0.0% (0)</td>
<td>0.4% (1)</td>
<td>0.67% (1)</td>
</tr>
<tr>
<td>Italian</td>
<td>20.4% (40)</td>
<td>15.2% (37)</td>
<td>6.7% (10)</td>
</tr>
<tr>
<td>Mexican</td>
<td>2.5% (5)</td>
<td>2.5% (6)</td>
<td>0.0% (0)</td>
</tr>
<tr>
<td>Middle Eastern</td>
<td>0.5% (1)</td>
<td>0.0% (0)</td>
<td>0.0% (0)</td>
</tr>
<tr>
<td>Motel Restaurants</td>
<td>1.0% (2)</td>
<td>1.2% (3)</td>
<td>6.0% (9)</td>
</tr>
<tr>
<td>Pubs/Clubs</td>
<td>12.2% (24)</td>
<td>7.1% (17)</td>
<td>17.1% (25)</td>
</tr>
<tr>
<td>Resort Restaurants</td>
<td>1.0% (2)</td>
<td>1.2% (3)</td>
<td>0.67% (1)</td>
</tr>
<tr>
<td>Seafood</td>
<td>7.6% (15)</td>
<td>8.2% (20)</td>
<td>8.0% (12)</td>
</tr>
<tr>
<td>Smorgasbord/Buffet</td>
<td>4.1% (8)</td>
<td>2.9% (7)</td>
<td>2.7% (4)</td>
</tr>
<tr>
<td>Steak Restaurants</td>
<td>3.6% (7)</td>
<td>1.6% (4)</td>
<td>1.3% (2)</td>
</tr>
<tr>
<td>Takeaway</td>
<td>7.1% (14)</td>
<td>0.8% (2)</td>
<td>0.67% (1)</td>
</tr>
<tr>
<td>Variety</td>
<td>29.6% (58)</td>
<td>23.0% (56)</td>
<td>22.1% (32)</td>
</tr>
<tr>
<td>Vegetarian</td>
<td>0.0% (0)</td>
<td>0.4% (1)</td>
<td>0.0% (0)</td>
</tr>
</tbody>
</table>

*Percentages are based on the number of responses made in this category

Note: For a breakdown of the “Asian” category see Table 3

Table 3: Asian Type of Restaurants Respondents from the Three Segments typically eat at When on Holiday (percentage of respondents in each segment)

<table>
<thead>
<tr>
<th></th>
<th>Young Market*</th>
<th>Affluent Market*</th>
<th>Mature Market*</th>
</tr>
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<tr>
<td></td>
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<tr>
<td></td>
<td>total responses = 57</td>
<td>total responses = 37</td>
<td>total responses = 28</td>
</tr>
<tr>
<td>Chinese</td>
<td>47.0% (27)</td>
<td>35.1% (13)</td>
<td>50% (14)</td>
</tr>
<tr>
<td>Asian in General</td>
<td>19.2% (11)</td>
<td>24.3% (9)</td>
<td>25% (7)</td>
</tr>
<tr>
<td>Thai</td>
<td>21.0% (12)</td>
<td>24.3% (9)</td>
<td>14.3% (4)</td>
</tr>
<tr>
<td>Japanese</td>
<td>3.5% (2)</td>
<td>10.8% (4)</td>
<td>7.1% (2)</td>
</tr>
<tr>
<td>Indian</td>
<td>8.7% (5)</td>
<td>5.4% (2)</td>
<td>3.6% (1)</td>
</tr>
</tbody>
</table>

* Percentages are based on the total number of responses made in this category

As illustrated in Table 2 all three market segments reported to prefer eating at a variety of restaurants. The most popular restaurants were Asian restaurants, followed by Pubs and Clubs, Italian restaurants, and Seafood restaurants. Furthermore, as can be seen from Table 3, Chinese restaurants were the most popular among the Asian restaurants.

Several differences between market segments need to be highlighted:

- The ‘Affluent Market’ showed a stronger preference for eating at a variety of different restaurants compared to the ‘Young Market’ and the ‘Mature Market’.
- While the ‘Affluent Market’, not surprisingly, reported to eat more frequently at A La Carte (or Fine Dining) restaurants compared to the other two market segments, the ‘Mature Market’ showed a preference for eating at Pubs and Clubs.
- Respondents from the ‘Mature Market’ and the ‘Young Market’ were more likely to eat at Asian style restaurants compared to the ‘Affluent Market’, while the ‘Affluent Market’ was more likely than the ‘Young Market’ and, in particular, the ‘Mature Market’ to seek out Italian restaurants.
- The ‘Grey Power’ was found to eat more frequently at Motel restaurants compared to respondents from the other two market segments.
The ‘Young Market’ and the ‘Mature Market’ reported to eat more frequently at Asian restaurants compared to respondents from the ‘Affluent Market’.

In contrast, the ‘Young Market’ was found to visit Coffee shops/Bistros, Fast Food restaurants, Family restaurants, and Takeaway outlets more frequently compared to the ‘Affluent Market’ and the ‘Mature Market’. For a detailed listing (frequency data and percentages) of the types of restaurants respondents from the three segments typically eat at, see Appendix B “Market Segments’ Restaurant Preferences”.

**Dinner Budget**

**‘Young Market’**

![Figure 10: Dinner Budget per Adult for the ‘Young Market’](image)

**Table 4: ‘Young Market’s’ Dinner Budget – frequencies, percentages, and cumulative percentages**

<table>
<thead>
<tr>
<th>Amount Spent</th>
<th>Frequency</th>
<th>Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5</td>
<td>1</td>
<td>.5%</td>
<td>.5%</td>
</tr>
<tr>
<td>$10</td>
<td>6</td>
<td>3.1%</td>
<td>3.6%</td>
</tr>
<tr>
<td>$15</td>
<td>8</td>
<td>4.1%</td>
<td>7.7%</td>
</tr>
<tr>
<td>$20</td>
<td>33</td>
<td>16.9%</td>
<td>24.6%</td>
</tr>
<tr>
<td>$25</td>
<td>15</td>
<td>7.7%</td>
<td>32.3%</td>
</tr>
<tr>
<td>$30</td>
<td>45</td>
<td>23.1%</td>
<td>55.4%</td>
</tr>
<tr>
<td>$35</td>
<td>7</td>
<td>3.6%</td>
<td>59%</td>
</tr>
<tr>
<td>$40</td>
<td>30</td>
<td>15.4%</td>
<td>74.4%</td>
</tr>
<tr>
<td>$45</td>
<td>1</td>
<td>.5%</td>
<td>74.9%</td>
</tr>
<tr>
<td>$50</td>
<td>33</td>
<td>16.9%</td>
<td>91.8%</td>
</tr>
<tr>
<td>$55</td>
<td>1</td>
<td>.5%</td>
<td>92.3%</td>
</tr>
<tr>
<td>$60</td>
<td>10</td>
<td>5.1%</td>
<td>97.4%</td>
</tr>
<tr>
<td>$65</td>
<td>1</td>
<td>.5%</td>
<td>97.9%</td>
</tr>
<tr>
<td>$70</td>
<td>3</td>
<td>1.5%</td>
<td>99.5%</td>
</tr>
<tr>
<td>$75</td>
<td>1</td>
<td>.5%</td>
<td>100%</td>
</tr>
</tbody>
</table>

As can be seen from Figure 10 and Table 4, the ‘Young Market’ tends to spend between $20 and $40 per adult when dining at a restaurant while on holiday, with budgets ranging between $5 and $75.
‘Affluent Market’

Figure 11: Dinner Budget per Adult for the ‘Affluent Market’

<table>
<thead>
<tr>
<th>Amount Spent</th>
<th>Frequency</th>
<th>Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>$10</td>
<td>2</td>
<td>1.2%</td>
<td>1.2%</td>
</tr>
<tr>
<td>$15</td>
<td>7</td>
<td>4.2%</td>
<td>5.4%</td>
</tr>
<tr>
<td>$20</td>
<td>9</td>
<td>5.4%</td>
<td>10.8%</td>
</tr>
<tr>
<td>$25</td>
<td>14</td>
<td>8.4%</td>
<td>19.2%</td>
</tr>
<tr>
<td>$26</td>
<td>1</td>
<td>.6%</td>
<td>19.8%</td>
</tr>
<tr>
<td>$30</td>
<td>40</td>
<td>24%</td>
<td>43.7%</td>
</tr>
<tr>
<td>$35</td>
<td>5</td>
<td>3%</td>
<td>46.7%</td>
</tr>
<tr>
<td>$40</td>
<td>15</td>
<td>9%</td>
<td>55.7%</td>
</tr>
<tr>
<td>$45</td>
<td>3</td>
<td>1.8%</td>
<td>57.5%</td>
</tr>
<tr>
<td>$50</td>
<td>32</td>
<td>19.2%</td>
<td>76.6%</td>
</tr>
<tr>
<td>$55</td>
<td>1</td>
<td>.6%</td>
<td>77.2%</td>
</tr>
<tr>
<td>$60</td>
<td>17</td>
<td>10.2%</td>
<td>87.4%</td>
</tr>
<tr>
<td>$65</td>
<td>2</td>
<td>1.2%</td>
<td>88.6%</td>
</tr>
<tr>
<td>$70</td>
<td>5</td>
<td>3%</td>
<td>91.6%</td>
</tr>
<tr>
<td>$75</td>
<td>3</td>
<td>1.8%</td>
<td>93.4%</td>
</tr>
<tr>
<td>$80</td>
<td>5</td>
<td>3%</td>
<td>96.4%</td>
</tr>
<tr>
<td>$90</td>
<td>3</td>
<td>1.8%</td>
<td>98.2%</td>
</tr>
<tr>
<td>$100</td>
<td>2</td>
<td>1.2%</td>
<td>99.4%</td>
</tr>
<tr>
<td>$150</td>
<td>1</td>
<td>.6%</td>
<td>100%</td>
</tr>
</tbody>
</table>

As illustrated in Figure 11 and Table 5, the ‘Affluent Market’ spends on average between $30 and $60 per person when dining at a restaurant while on holiday, with budgets ranging from $10 to $150.
‘Mature Market’

As illustrated in Figure 12 and Table 6, the ‘Mature Market’ typically reported to spend between $20 and $40 per adult when dining at a restaurant, with budgets ranging from $10 to $80.

Influence of Printed Material

In the following section questions were asked concerning the degree to which printed materials, such as restaurant reviews in newspapers and magazines, influenced respondents’ choice of restaurant when on holiday. Respondents were asked to rate the different printed materials on a one to six scale, with one signifying no influence and six signifying extreme influences.
‘Young Market’

Figure 13: Influence of Printed Material on the ‘Young Market’s’ Choice of Restaurant When on Holiday (mean ratings; n = 195)

<table>
<thead>
<tr>
<th>Print Media Type</th>
<th>Mean Degree of Influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertisement</td>
<td>3.06</td>
</tr>
<tr>
<td>Chef’s reputation</td>
<td>2.28</td>
</tr>
<tr>
<td>Food magazines</td>
<td>1.93</td>
</tr>
<tr>
<td>Food guides</td>
<td>2.29</td>
</tr>
<tr>
<td>Region’s paper</td>
<td>2.65</td>
</tr>
</tbody>
</table>

Figure 14: Influence of Printed Materials on the ‘Young Market’s’ Choice of Restaurants When on Holiday (percentages; n = 195)

Figure 13 and Figure 14 illustrate the degree of influence that various forms of printed materials have on the ‘Young Market’s’ choice of restaurants when on holiday. While advertisements in newspapers, magazines and dining out guides exerted the strongest influence on respondents’ choice, followed by restaurant reviews in the region’s local newspaper, food magazines appeared to be the least influential of the five types of printed material.
‘Affluent Market’

Figure 15: Influence of Printed Material on the ‘Affluent Market’s’ Choice of Restaurant When on Holiday (mean ratings; n = 167)

![Bar chart showing mean degree of influence for different types of printed materials: Advertisements (3.08), Chef's reputation (2.94), Food magazines (2.57), Food guides (2.81), Region's paper (2.98).]

Figure 16: Influence of Printed Materials on ‘Affluent Market’s’ Choice of Restaurant When on Holiday (percentages; n = 167)

![Pie chart showing influence percentages for different types of printed materials: Region’s paper, Food Guides, Food Magazines, Chef’s Reputation, Advertisements.]

Figure 15 and Figure 16 illustrate the degree of influence that various forms of printed materials have on the ‘Affluent Market’s’ choice of restaurant when on holiday. While advertisements in newspapers, magazines and dining out guides exerted the strongest influence, followed by restaurants reviews in the region’s local paper, references to the reputation of the chef in newspapers or magazines also played an influential role, with food magazines being the least influential.
‘Mature Market’

Figure 17: Influence of Printed Material on the ‘Mature Market’s’ Choice of Restaurant When on Holiday (mean ratings; n = 97)

Figure 18: Influence of Printed Materials on the ‘Mature Market’s’ Choice of Restaurant When on Holiday (percentages; n = 97)

Figure 17 and Figure 18 illustrate the degree of influence that various forms of printed materials have on the ‘Mature Market’s’ choice of restaurant when on holiday. While restaurant reviews in regions’ local newspapers and advertisements in newspapers, magazines and dining out guides exerted the strongest influence on the ‘Mature Market’s’ decision process, food magazines were the least influential.
Comparison Across Segments

Figure 19: Comparison between Market Segments – the influence of printed materials on respondents’ choice of restaurant when on holiday (mean ratings; n = 459)

Table 7: Comparison between Market Segments – the influence of printed materials on respondents’ choice of restaurant when on holiday (mean ratings and ANOVA comparisons; n = 459)

<table>
<thead>
<tr>
<th>Print Media Type</th>
<th>Young Market (1)</th>
<th>Affluent Market (2)</th>
<th>Mature Market (3)</th>
<th>Difference/s Between Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertisement</td>
<td>3.06</td>
<td>3.08</td>
<td>2.40</td>
<td>1 = 2; 1 ≠ 3*; 2 ≠ 3*</td>
</tr>
<tr>
<td>Chef’s reputation</td>
<td>2.28</td>
<td>2.94</td>
<td>1.92</td>
<td>1 ≠ 2*; 1 = 3; 2 ≠ 3*</td>
</tr>
<tr>
<td>Food Magazines</td>
<td>1.93</td>
<td>2.57</td>
<td>1.67</td>
<td>1 ≠ 2*; 1 = 3; 2 ≠ 3*</td>
</tr>
<tr>
<td>Food Guides</td>
<td>2.29</td>
<td>2.81</td>
<td>1.89</td>
<td>1 ≠ 2*; 1 = 3; 2 ≠ 3*</td>
</tr>
<tr>
<td>Region’s Paper</td>
<td>2.65</td>
<td>2.98</td>
<td>2.38</td>
<td>1 = 2; 1 = 3; 2 ≠ 3*</td>
</tr>
</tbody>
</table>

Note: * in the last column means there is no statistically significant difference between segments

Figure 19 provides an overview of the extent to which the three market segments differed in terms of their reliance on print media when selecting restaurants while on holiday, while Table 7 shows whether the segments differed statistically on each of the five dimensions. For example, with regard to advertisements, statistical analysis revealed that the ‘Mature Market’ relied considerably less on advertisements when selecting a restaurant compared to the ‘Young Market’ and the ‘Affluent Market’, which equally relied on advertisements. In contrast, when reliance on the chef’s reputation was concerned, the ‘Mature Market’ seemed to value this type of information source considerably more than the ‘Young Market’ and the ‘Mature Market’.

For a detailed description of the statistical analyses conducted, see Appendix C “Comparison between Market Segments – Reliance on Print Media”.

The following series of graphs provide comparisons between the three market segments in terms of the degree of influence of the various print media.
Figure 20: Comparisons between Market Segments in Terms of the Degree of Influence that Advertisements have on Choice of Restaurant (percentages; n = 459)

Figure 21: Comparison between Market Segments in Terms of the Degree of Influence that the Reputation of the Chef has on Choice of Restaurant (percentages; n = 459)

Figure 22: Comparisons between Market Segments in Terms of the Degree of Influence that Food Magazines have on Restaurant Choice (percentages; n = 459)
Figure 23: Comparisons between Market Segments in Terms of the Degree of Influence that Food Guides have on Choice of Restaurant (percentages; n = 459)

![Bar chart showing comparisons between market segments in terms of the degree of influence that food guides have on choice of restaurant.](image)

Figure 24: Comparisons between Market Segments in Terms of the Degree of Influence that Regions’ Local Newspapers have on Choice of Restaurant (percentages; n = 459)

![Bar chart showing comparisons between market segments in terms of the degree of influence that regions’ local newspapers have on choice of restaurant.](image)

From Figure 20 to Figure 24 it can be seen that the ‘Affluent Market’ was most strongly influenced by all of the five types of printed material, followed by the ‘Young Market’, with print media exerting the least influence on the ‘Mature Market’. Overall, advertisements in newspapers, magazines and dining out guides consistently exerted the strongest influence on respondents’ choice of restaurants followed by regions’ local newspapers, with food magazines consistently being the least influential.

**Restaurant Characteristics**

In this section, respondents were asked to what degree certain restaurant characteristics, such as the display of a menu in the window or evidence of local food products, would influence their choice of restaurant when on holiday. Items were rated on a one to six rating scale (1 = no influence; 6 = extreme influence).
‘Young Market’

Figure 25: Influence of Restaurant Characteristics on ‘Young Market’s’ Choice of Restaurant When on Holiday (mean ratings; n = 195)

![Graph showing the influence of various restaurant characteristics on the 'Young Market's' choice of restaurant during holidays. The characteristics include variety of food, attractive atmosphere/décor, looking busy, local food products, and display of menu. The mean degrees of influence range from 3.34 to 4.65.]

Figure 26: Influence of Restaurant Characteristics on ‘Young Market’s’ Choice of Restaurant When on Holiday (percentages; n = 195)

![Graph showing the influence of various restaurant characteristics on the 'Young Market's' choice of restaurant during holidays. The characteristics include menu, local products, looking busy, atmosphere, and food variety. The percentages represent the proportion of respondents who found each characteristic to have strong, moderate, or no/little influence.]

Figure 25 and Figure 26 illustrate the degree of influence that various restaurant characteristics exerted on the ‘Young Market’s’ choice of restaurant when on holiday. For this market segment, a large variety of food on the menu was the most influential restaurant characteristic, followed by the restaurant having an attractive décor or atmosphere and the display of a menu in the window. In contrast, local food products featured in the menu revealed to have the least impact on the ‘Young Market’s’ decision process.
‘Affluent Market’

Figure 27: Influence of Restaurant Characteristics on ‘Affluent Market’s’ Choice of Restaurant When on Holiday (mean ratings; n = 167)

Figure 28: Influence of Restaurant Characteristics on ‘Affluent Market’s’ Choice of Restaurant When on Holiday (percentage; n = 167)

Figure 27 and Figure 28 show the degree of influence that various restaurant characteristics exercised on the ‘Affluent Market’s’ choice of restaurant when on holiday. For this market segment, the most influential restaurant characteristic was an attractive atmosphere and décor, followed by the display of a menu in the window. While the ‘Affluent Market’ perceived a large variety of food on the menu and the restaurant looking busy to be of equal importance, local food products featured in the menu were considered least influential.
‘Mature Market’

Figure 29: Influence of Restaurant Characteristics on ‘Mature Market’s Choice of Restaurant When on Holiday (mean ratings; n = 97)

![Graph showing the mean degree of influence on restaurant choice for the Mature Market segment.]

Figure 30: Influence of Restaurant Characteristics on ‘Mature Market’s Choice of Restaurant When on Holiday (percentages; n = 97)

![Graph showing the percentage influence on restaurant choice for the Mature Market segment.]

As illustrated in Figure 29 and Figure 30, for this market segment, the most influential restaurant characteristics involved the display of a menu in the window, followed by the restaurant exuding an attractive atmosphere. While the ‘Mature Market’ rated evidence of a large variety of food on the menu and the restaurant looking busy along similar lines, once again, local food product featured in the menu was perceived as least influential in the decision process.
Comparison Across Segments

Figure 31: Overview of the Influence of Restaurant Characteristics on Respondents’ Choice of Restaurant When on Holiday (mean ratings; n = 459)

Table 8: Overview of the Influence of Restaurant Characteristics on Respondents’ Choice of Restaurant When on Holiday (mean ratings and ANOVA comparisons; n = 459)

<table>
<thead>
<tr>
<th>Restaurant Characteristics</th>
<th>Young Market (1)</th>
<th>Affluent Market (2)</th>
<th>Mature Market (3)</th>
<th>Differences Between Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variety of Food</td>
<td>4.65</td>
<td>4.38</td>
<td>4.00</td>
<td>1 = 2; 1 ≠ 3; 2 ≠ 3</td>
</tr>
<tr>
<td>Atmosphere/Décor</td>
<td>4.45</td>
<td>4.7</td>
<td>4.34</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Looking Busy</td>
<td>3.97</td>
<td>4.43</td>
<td>3.96</td>
<td>1 ≠ 2; 1 = 3; 2 ≠ 3</td>
</tr>
<tr>
<td>Local Food Products</td>
<td>3.34</td>
<td>3.89</td>
<td>3.65</td>
<td>1 ≠ 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Display of Menu</td>
<td>4.38</td>
<td>4.49</td>
<td>4.49</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
</tbody>
</table>

Note: Symbol = in the last column means there is no statistically significant difference between segments  
Symbol ≠ in the last column means there is a statistically significant difference between segments

Figure 31 illustrates mean comparisons between market segments. While the display of a menu in the window and the atmosphere and decor of the restaurant seemed to exercise the strongest influence on respondents’ restaurant choice, local food products appeared to be least influential. Information provided in Table 8 shows that the ‘Young Market’ and the ‘Mature Market’ tended to agree in terms of the extent to which they viewed restaurant characteristics as being important, with the exception of food variety. For the ‘Young Market’, a large variety of food on the menu was on average more important than for the Mature Market. Furthermore, the restaurant looking busy and evidence of local food products on the menu revealed to be considerably more important for the ‘Affluent Market’ than the ‘Young Market’. The ‘Affluent Market’ and the ‘Mature Market’ differed on two dimensions only, with the “Affluent Market” viewing evidence of a large variety of food on the menu and the restaurant being busy as notably more important than the ‘Mature Market’.

For a detailed description of the statistical analyses conducted, see Appendix D “Comparison Between Market Segments – Importance of Restaurant Characteristics”.

The following series of graphs (Figure 32 to Figure 36) provide detailed information about the degree of influence that each of the restaurant characteristics had on respondents from the three segments.
Figure 32: Comparisons between Market Segments – degree of influence that the display of a menu in the window has on restaurant choice (percentages; n = 459)

Display of Menu

- very/extremely influential
- moderately influential
- not influential

Figure 33: Comparison between Market Segments – degree of influence that local food products featured in the menu have on restaurant choice (percentages; n = 459)

Local Food Products

- very/extremely influential
- moderately influential
- not influential

Figure 34: Comparison between Market Segments – degree of influence of the restaurant looking busy on choice of restaurant (percentages; n = 459)

Looking busy

- very/extremely influential
- moderately influential
- not influential
Inspection of Figure 32 to Figure 36 revealed several differences between market segments:

- Local food products featured in the menu revealed to be most influential on the ‘Affluent Market’s’ choice of restaurant when on holiday, and the least influential on the ‘Young Market’s’ choice.
- Seeing that the restaurant is busy was found to exert the strongest influence on the ‘Affluent Market’s’ choice of restaurant.
- An attractive atmosphere and décor, although very influential across all three market segments, was found to be most influential on the ‘Affluent Market’s’ choice of restaurant.
- Evidence of a wide variety of food on the menu was revealed to exert the strongest influence on the ‘Young Market’s’ choice of restaurant, followed by the ‘Affluent Market’ and then the ‘Mature Market’.
Influence of Alcoholic Beverages & Location
Respondents were also asked questions relating to the availability of alcoholic beverages and the proximity of the restaurant to tourists' accommodation. Items were rated on a six-point scale.

‘Young Market’

Figure 37: Influence of Alcoholic Beverages and Restaurant Location on the ‘Young Market’s’ Choice of Restaurant When on Holiday (mean ratings; n = 195)

As illustrated in Figure 37 and Figure 38, the majority of respondents belonging to the ‘Young Market’ were strongly influenced by the location of the restaurant being within walking distance of their accommodation. Surprisingly, more than 40% of respondents in this group reported that the opportunity to bring their own wine did not have any influence on their choice of restaurant. In contrast, nearly 40% stated that an extensive wine list offered by the restaurant tended to be moderately to very influential, indicating that an extensive wine list may be an appealing restaurant characteristic the ‘Young Market’ takes into consideration when selecting a restaurant.
‘Affluent Market’

Figure 39: Influence of Alcoholic Beverages and Restaurant Location on the ‘Affluent Market’s’ Choice of Restaurant When on Holiday (mean ratings; n = 167)

Figure 40: Influence of Alcoholic Beverages and Restaurant Location on the ‘Affluent Market’s’ Choice of Restaurant When on Holiday (percentages; n = 167)

Figure 39 and Figure 40 illustrate that the ‘Affluent Market’ considered the restaurant being within walking distance of respondents’ accommodation as a very influential factor in the selection of a restaurant. With regard to the influence of alcoholic beverages, nearly 60% of respondents in this market segment reported an extensive wine list offered by the restaurant as being moderately to strongly influential in the decision process, with just over 60% stating the opportunity to bring their own wine as being moderately to strongly influential.
‘Mature Market’

Figure 41: Influence of Alcoholic Beverages and Restaurant Location on the ‘Mature Market’s’ Choice of Restaurant When on Holiday (mean ratings; n = 97)

Figure 42: Influence of Alcoholic Beverages and Restaurant Location on the ‘Mature Market’s’ Choice of Restaurant When on Holiday (percentages; n = 97)

Figure 41 and Figure 42 illustrate that the ‘Mature Market’ similar to the other two market segments, regarded the location of the restaurant as a very influential factor in their restaurant selection process. Furthermore, while over 40% of respondents belonging to this market segment reported that the opportunity to bring their own wine was moderately to strongly influential, almost 40% reported an extensive wine list offered by the restaurant as having a moderate to strong influence on their choice of restaurant.
Comparison Across Segments

Figure 43: Overview of Influence of Alcoholic Beverages and Location on Respondents’ Choice of Restaurant When on Holiday (mean ratings; n = 459)

Table 9: Overview of Influence of Alcoholic Beverages and Location on Respondents’ Choice of Restaurant When on Holiday (mean ratings and ANOVA comparisons; n = 459)

<table>
<thead>
<tr>
<th>Location/ Beverages</th>
<th>Young Market</th>
<th>Affluent Market</th>
<th>Mature Market</th>
<th>Difference/s Between Clusters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>4.4</td>
<td>4.37</td>
<td>4.48</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Wine List</td>
<td>2.33</td>
<td>2.95</td>
<td>2.16</td>
<td>1 ≠ 2; 1 = 3; 2 ≠ 3</td>
</tr>
<tr>
<td>BYO Wine</td>
<td>3.16</td>
<td>3.57</td>
<td>2.79</td>
<td>1 = 2; 1 = 3; 2 ≠ 3</td>
</tr>
</tbody>
</table>

Note: Symbol = in the last column means there is no statistically significant difference between segments
Symbol ≠ in the last column means there is a statistically significant difference between segments

Figure 43 illustrates mean comparisons between market segments and Table 9 provides information about whether the market segments differ statistically in terms of their ratings. Restaurant location was rated consistently, across all three segments, as a very influential factor in the selection of a suitable restaurant. With regard to the influence of alcoholic beverages, on average, all three market segments viewed the opportunity to bring their own wine as more influential compared to an extensive wine list offered by the restaurant. The ‘Young Market’ and the ‘Mature Market’ agreed that the provision of a wine list was of low importance, while it was moderately important to the ‘Affluent Market’. Furthermore, the ‘Affluent Market’ viewed the opportunity to ‘bring your own wine’ as considerably more important than the ‘Mature Market’.

For a detailed description of the statistical analyses conducted see Appendix E “Comparison Between Market Segments – Importance of Location and Alcoholic Beverages”.

The following series of graphs (Figure 44 to Figure 46) provide detailed information regarding the influence of alcoholic beverages and restaurant location across the three market segments.
Figure 44: Comparisons between Market Segments – degree of influence that the opportunity to bring your own wine has on choice of restaurant (percentages; n = 459)

BYO Wine

Figure 45: Comparisons between Market Segments – degree of influence that an extensive wine list offered by the restaurant has on choice of restaurant (percentages; n = 459)

Wine List

Figure 46: Comparison between Market Segments – degree of influence that the location of the restaurant has on choice of restaurant (percentages; n = 459)

Location
Investigation of Figure 44 to Figure 46 revealed a number of differences between market segments:

- Overall, alcoholic beverages were revealed to be most important to the ‘Affluent Market’s’ dining experience:
  - The opportunity to BYO wine was regarded as most influential by the ‘Affluent Market’, followed by the ‘Young Market’, and then the ‘Mature Market’.
  - An extensive wine list offered by the restaurant exerted the strongest influence on the ‘Affluent Market’, followed by the ‘Young Market’ and the ‘Mature Market’ who viewed the provision of a wine list along similar lines.
- Although all three market segments reported the location of the restaurant to be a very influential factor, restaurant location had the most influence on the ‘Mature Market’s’ choice of restaurant.

Overview – Influence of Printed Material & Restaurant Characteristics

Figure 47: Overview of the Influence of Various Printed Material and Restaurant Characteristics on Respondents’ Choice of Restaurant When on Holiday (mean ratings; n = 459)

Figure 47 presents an overview of this section. Comparisons of the influence of printed materials and restaurant characteristics as information sources impacting on respondents’ restaurant choice revealed that across all three market segments, restaurant characteristics, in general, had a much stronger influence on respondents’ decision process compared to printed materials. Overall, sources of information that exerted the most influence included the display of a menu in the window, the restaurant having an attractive décor and atmosphere, and the location of the restaurant being within walking distance of respondents’ accommodation. While the opportunity to ‘bring your own wine’ was rated as more influential than being able to select a bottle of wine from an extensive wine list provided by the restaurant, the influence of alcoholic beverages, in general, compared to other restaurant characteristics had surprisingly little influence on each of the three market segments’ decision process.

Information Sources Used

The following section reports on information sources respondents from the three segments typically rely upon when choosing restaurants while on holiday. Respondents were asked to indicate up to three information sources from a list of eight options.
‘Young Market’

Figure 48: Information Sources the ‘Young Market’ Relies Upon Most when Selecting Restaurants when on Holiday (frequency data; n = 195)

There were a total of 504 responses from the “Young Market”. As illustrated in F, the option most frequently chosen involved respondents to ‘wander around’ until they found a suitable restaurant to dine at. The second most frequently relied upon information source was ‘word of mouth recommendations from friends and/or relatives’, followed by ‘recommendations from local people and business in the area’. Surprisingly, only a very small number of respondents reported to rely on the Internet as a source of information.

‘Affluent Market’

Figure 49: Information Sources the ‘Affluent Market’ Relies Upon Most when Selecting Restaurants when on Holiday (frequency data; n = 167)

There were a total of 429 responses from respondents belonging to the ‘Affluent Market’. As can be seen from Figure 49, the ‘Affluent Market’ reported to rely most upon recommendations from local people and business’s in the area, followed by word of mouth recommendations from friends and/or relatives. The third most frequently relied upon source of information involved wandering around looking for a suitable restaurant to dine in.
‘Mature Market’

Figure 50: Information Sources the ‘Mature Market’ Relies Upon Most when Selecting Restaurants when on Holiday (frequency data; n = 97)

There were a total of 240 responses from respondents belonging to the ‘Mature Market’. As illustrated in Figure 50, respondents belonging to this group reported to typically select restaurants by wandering around. The next most frequently relied upon source of information consisted of word of mouth recommendations from friends and/or relatives, which was closely followed by recommendations from local people and business’s in the area.
Overview

Figure 51: Overview of the Information Sources Relyed Upon Most by Respondents From the Three Market Segments (percentage of respondents from each segment; n = 459)

Figure 51 provides an overview of this section. The following points are noteworthy:

- Respondents from all three segments relied most upon three types of information sources: wandering around, word of mouth, and recommendation from local people and business in the area.

- Specifically, wandering around was shown to be the most relied upon information source among respondents from the ‘Young Market’ and the ‘Mature Market’, while the ‘Affluent Market’ seemed to base their restaurant choice most strongly on recommendations from local people and business in the area.

- Participants from all three segments seemed to rely to a lesser extent on past experience when selecting a restaurant while on holiday, with the ‘Affluent Market’ viewing past experience as more important than the other two segments.

- When looking for differences in the reliance on information sources including magazines, dining out guides and newspaper articles, the ‘Mature Market’ relied more on newspaper articles, and the ‘Affluent’ and ‘Young Market’ more on dining out guides.

- Surprisingly, the Internet was used by very few as a source of information to facilitate restaurant selection.
Reasons for Eating Out
Respondents were asked a series of questions concerning their motivations and reasons for eating out when on holiday.

‘Young Market’

As can be seen from Figure 52 and Figure 53, for the ‘Young Market’, ‘relaxation’ and ‘comfort’ (i.e., to be waited on and not having to cook yourself) were considered by far the most important reason for dining out at restaurants when on holiday. Furthermore, eating out was also seen as a very important part of the overall holiday experience, with young people emphasising the importance of eating healthy food.
‘Affluent Market’

As illustrated in Figure 54 and Figure 55, for the ‘Affluent Market’, ‘relaxation’ (i.e., to be waited on and not having to cook yourself) was clearly the most important reason for eating at a restaurant when on holiday. Furthermore, dining out was seen as an essential part of the overall holiday experience, with the ‘Affluent Market’ considering the dining experience as a very good opportunity to catch up and talk with friends and/or family. While eating healthy food was viewed as very important, ‘indulgence’ (i.e. either fine dining or just the feeling of spoiling yourself) was also highly valued.
‘Mature Market’

As can be seen from Figure 56 and Figure 57, for the ‘Mature Market’, ‘relaxation’ (i.e., to be waited on and not having to cook yourself) was considered the most important reason for eating out when on holiday, closely followed by eating healthy food. While the ‘experience’ (i.e., eating out is part of the overall holiday experience) and the ‘social aspect’ (i.e., the chance to mix and talk with friends and/or family) were rated along similar lines, trying new and different foods was seen as the least important reason for dining at a restaurant.
Overview

Figure 58: Overview of the Reasons for Eating Out among the Three Market Segments (mean ratings; n = 459)

<table>
<thead>
<tr>
<th>Reasons for Dining out</th>
<th>Young Market (1)</th>
<th>Affluent Market (2)</th>
<th>Mature Market (3)</th>
<th>Difference/s Between Clusters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indulgence</td>
<td>3.97</td>
<td>4.46</td>
<td>3.77</td>
<td>1 ≠ 2; 1 = 3; 2 ≠ 3</td>
</tr>
<tr>
<td>Healthy Food</td>
<td>4.18</td>
<td>4.62</td>
<td>4.75</td>
<td>1 ≠ 2; 1 ≠ 3; 2 = 3</td>
</tr>
<tr>
<td>Relaxation</td>
<td>4.97</td>
<td>5.25</td>
<td>4.9</td>
<td>1 ≠ 2; 1 = 3; 2 ≠ 3</td>
</tr>
<tr>
<td>Experience</td>
<td>4.33</td>
<td>4.82</td>
<td>3.97</td>
<td>1 ≠ 2; 1 ≠ 3; 2 ≠ 3</td>
</tr>
<tr>
<td>Discovery</td>
<td>4.09</td>
<td>4.35</td>
<td>3.65</td>
<td>1 = 2; 1 ≠ 3; 2 ≠ 3</td>
</tr>
<tr>
<td>Social reason</td>
<td>4.18</td>
<td>4.69</td>
<td>3.92</td>
<td>1 ≠ 2; 1 = 3; 2 ≠ 3</td>
</tr>
</tbody>
</table>

Note: Symbol = in the last column means there is no statistically significant difference between segments
Symbol ≠ in the last column means there is a statistically significant difference between segments

As illustrated in Figure 58, overall, ‘relaxation’ (i.e., to be waited on and not having to cook yourself) was rated as the most important reason for eating out when on holiday, which was closely followed by eating healthy food and viewing dining out as an essential part of the overall holiday experience. Overall, trying new and different foods was seen as the least important reason for eating out when on holiday. The information provided in Table 10 shows that the ‘Young Market’ and the ‘Mature Market’ were by and large motivated by the same reasons when dining out while on holiday, with the exception that the ‘Mature Market’ was found to place considerably more importance on eating healthy cuisine while on holiday than the ‘Young Market’ and less emphasis on discovering new and exciting foods. In contrast, the ‘Affluent Market’ and the ‘Mature Market’ differed notably in their ratings with the exception of eating healthy food and relaxation as an important motivation for dining out. Finally, the ‘Young Market’ and the ‘Affluent Market’ only agreed in terms of valuing the relaxation aspect of the dining experience and enjoying the discovery of new and exciting foods. For a detailed description of the statistical analyses conducted see Appendix F “Comparison Between Market Segments – Reasons for Eating Out While on Holiday”.

The following series of graphs (Figure 59 to Figure 64) will provide detailed information about reasons for eating out across the three market segments.
Figure 59: Comparison between Market Segments – importance of ‘indulgence’ (percentages; n = 459)

Figure 60: Comparison between Market Segments – importance of eating healthy food (percentages; n = 459)

Figure 61: Comparison between Market Segments – importance of ‘relaxation’ (percentages; n = 459)
Figure 62: Comparison between Market Segments – importance of ‘experience’ (percentages; n = 459)

Figure 63: Comparison between Market Segments – importance of ‘discovery’ (percentages; n = 459)

Figure 64: Comparison between Market Segments – importance of ‘social reason (percentages; n = 459)
Investigation of Figure 59 to Figure 64 revealed a number of differences between market segments:

- Although all three segments rated ‘relaxation’ (i.e., to be waited on and not having to cook yourself) as the most important reason for dining at a restaurant, the ‘Affluent Market’ perceived the relaxation aspect of the dining experience as even more important than the ‘Young Market’ and the ‘Mature Market’.

- Although eating healthy food was considered a very important factor across all three segments, the ‘Affluent Market’ and the ‘Mature Market’, on average, considered eating healthily as more important than the ‘Young Market’.

- While eating out was seen as an important part of the overall holiday experience by respondents from all three market segments, the ‘Affluent Market’ viewed ‘experience’ as more important than the ‘Young Market’ and the ‘Mature Market’.

- On average, the ‘Affluent Market’ viewed the ‘social aspect’ of the dining experience as more important than the ‘Young Market’ and the ‘Mature Market’, with the ‘Mature Market’ rating the ‘social aspect’ somewhat less important than the ‘Young Market’.

- The ‘Affluent Market’ rated ‘indulgence’ (i.e., either fine dining or just the feeling of spoiling yourself) as more important than the ‘Young Market’ and the ‘Mature Market’.

Perceptions of Food & Restaurant Characteristics

In this section respondents were asked four different types of questions concerning their perception of food and restaurants for six regions around Australia (Brisbane, Sydney, Melbourne, Tasmania, Gold Coast and Sunshine Coast). First, respondents were asked how they perceived each of the six regions in terms of having a good variety of restaurants. Second, participants were invited to rate each region’s dining precincts. Next, participants’ perception of the overall reputation of each region’s restaurants was explored, and finally, respondents were asked about how they would rate each region’s restaurants in terms of featuring regional produce. A ten point scale was used, with one being a low rating and ten being a high rating.
‘Young Market’

Variety of Restaurants

Figure 65: ‘Young Market’s’ Perception of Regions’ Restaurant Variety (mean ratings; n = 195)

As illustrated in Figure 65, on average, Melbourne was perceived as having the best variety of restaurants, followed by Sydney. While Brisbane and the Gold Coast were typically rated along similar lines, Tasmania, comparatively, was perceived as having a reasonable variety of restaurants. More detailed information provided in Figure 66 revealed that roughly 90% of the ‘Young Market’ perceived the variety of restaurants in Sydney and Melbourne as ‘good’ or ‘excellent’, with Melbourne receiving more ‘excellent ratings’ compared to Sydney. Furthermore, more than 50% of the ‘Young Market’ viewed Brisbane and the Gold Coast as having a ‘good’ to ‘very good/excellent’ selection of restaurants, with the majority of respondents from the ‘Young Market’ reporting Tasmania to provide a satisfactory restaurant variety.

Figure 66: ‘Young Market’s’ Perception of Restaurant Variety (percentages; n = 195)
Dining Precincts

Figure 67: ‘Young Market’s’ Perception of Regions’ Dining Precincts (mean ratings; n = 195)

Figure 68: ‘Young Market’s’ Perception of Regions’ Dining Precincts (percentages; n = 195)

Figure 68 shows that the ‘Young Market’s’ perception of dining precincts in Melbourne and Sydney was very high. Furthermore, precincts in Brisbane, the Gold Coast and Sunshine Coast were viewed as ‘good’, with Tasmanian precincts typically viewed as satisfactory. Furthermore, a more detailed picture provided by Figure 68 reveals that nearly 80% of the ‘Young Market’ perceived Sydney’s precincts as ‘good’ or ‘very good/excellent’, compared to 90% in the case of Melbourne’s precincts. While approximately 50% of the ‘Young Market’ rated Gold Coast, Sunshine Coast and Brisbane precincts as ‘good’ to ‘very good/excellent’, 80% expressed satisfaction with Tasmania’s precincts.
Overall Reputation

Figure 69: ‘Young Market’s’ Perception of the Overall Reputation of the Regions’ Restaurants (mean ratings; n = 195)

![Bar chart showing mean ratings for regions' restaurants](chart1)

Figure 70: ‘Young Market’s’ Perception of the Overall Reputation of the Regions’ Restaurants (percentages; n = 195)

![Stacked bar chart showing percentages for regions' restaurants](chart2)

As can be seen from Figure 69, mean comparisons relating to the overall reputation of restaurants across the six regions revealed that the ‘Young Market’ perceived Melbourne’s restaurants as having the best reputation, closely followed by Sydney. The remaining four regions were viewed along similar lines with mean ratings in the ‘good’ range. More detailed information provided in Figure 70 revealed that close to 90% of the ‘Young Market’ perceived the reputation of Sydney’s and Melbourne’s restaurants as ‘good’ or ‘very good/excellent’. While 70% of the ‘Young Market’ viewed Brisbane’s restaurants to have a ‘good’ to ‘very good/excellent’ reputation, approximately 50% of the ‘Young Market’ felt this way when thinking about the reputation of restaurants in Tasmania, the Gold Coast and the Sunshine Coast.
Regional Produce

Figure 71: ‘Young Market’s’ Perception of the Regions’ Restaurants featuring Regional Produce (mean ratings; n = 195)

As illustrated in Figure 71 and Figure 72, on average, of the six regions, Tasmania’s restaurants received the best ratings for their presentation of regional produce, with 70% of the ‘Young Market’ giving ratings in the ‘good’ to ‘very good/excellent’ range.
‘Affluent Market’

Variety of Restaurants

Figure 73: ‘Affluent Market’s’ Perception of the Regions’ Restaurant Variety (mean ratings; n = 167)

As illustrated in Figure 73, the ‘Affluent Market’, on average, perceived the variety of restaurants in Sydney and Melbourne as excellent, with Brisbane, the Gold Coast, Sunshine Coast and Tasmania typically perceived as offering a good selection of restaurants. Figure 74 provided a more detailed picture of respondents’ ratings, revealing that around 90% of the ‘Affluent Market’ viewed the variety of restaurants in Sydney and Melbourne as ‘good’ or ‘very good/excellent’. In contrast, roughly 60% of the ‘Affluent Market’ rated Brisbane, the Gold Coast and Sunshine Coast as offering a ‘good or ‘very good/excellent’ mixture of restaurants, with 90% of respondents perceiving Tasmania as offering a satisfactory restaurant selection.
As illustrated in Figure 75 and Figure 76, the ‘Affluent Market’ perceived Melbourne, closely followed by Sydney, as offering the best dining precincts. While Brisbane, the Gold Coast and Sunshine Coast were rated as having good dining precincts, Gold Coast dining precincts received slightly more ‘very good/excellent’ ratings compared to precincts on the Sunshine Coast and Brisbane.
Overall Reputation

Figure 77: ‘Affluent Market’s’ Perception of the Overall Reputation of the Regions’ Restaurants (mean ratings; n = 167)

As illustrated in Figure 77 and Figure 78, restaurants in Sydney and Melbourne were perceived as having a very good reputation, followed by Brisbane, the Gold Coast, the Sunshine Coast, and Tasmania. While 90% of respondents viewed Melbourne and Sydney restaurants in the ‘good’ to ‘very good excellent’ range, more than 50% of the ‘Affluent Market’ felt this about Brisbane, the Gold Coast, the Sunshine Coast and Tasmania.
Regional Produce

Figure 79: ‘Affluent Market’s’ Perception of the Regional Produce featured by the Regions’ Restaurants
(mean ratings; n = 167)

![Mean Rating Graph](image)

Figure 80: ‘Affluent Market’s’ Perception of the Regional Produce featured in the Regions’ Restaurants
(percentages; n = 167)

![Percentage Graph](image)

As can be seen from Figure 79 and Figure 80, restaurants in Sydney, Melbourne and Tasmania were perceived along similar lines in terms of featuring regional produce, with close to 80% of the ‘Affluent Market’ giving ratings in the ‘good’ to ‘very good/excellent’ range. Furthermore, more than 50% of the ‘Affluent Market’ viewed restaurants in Brisbane, the Gold Coast and the Sunshine Coast as ‘good’ to ‘very good/excellent’ regarding their presentation of local food products.
‘Mature Market’

Variety of Restaurants

Figure 81: The ‘Mature Market’s’ Perception of the Regions’ Restaurant Variety (mean ratings; n = 97)

As illustrated in Figure 81 and Figure 82, the ‘Mature Market’ perceived Sydney and Melbourne as offering the best variety of restaurants, followed by the Gold Coast, Brisbane, the Sunshine Coast and Tasmania. While more than 80% of the ‘Mature Market’ perceived Melbourne and Sydney to have a ‘good’ to ‘very good/excellent’ selection of restaurants, between 50% to 60% of the ‘Mature Market’ expressed this opinion about the remaining four regions.
Dining Precincts

Figure 83: The ‘Mature Market’s’ Perception of the Regions’ Dining Precincts (mean ratings; n = 97)

![Bar chart showing mean ratings for different regions.](chart1.png)

Figure 84: The ‘Mature Market’s’ Perception of the Regions’ Dining Precincts (percentages; n = 97)

![Bar chart showing percentages for different regions.](chart2.png)

From Figure 83 and Figure 84, it can be seen that the ‘Mature Market’ perceived dining precincts in Melbourne and Sydney along similar lines, with approximately 80% of the ‘Mature Market’ giving ratings in the ‘good’ to ‘very good/excellent’ range. While about 60% of the ‘Mature Market’ viewed precincts in Brisbane and the Gold Coast as ‘good’ to ‘very good/excellent’, approximately 80% expressed satisfaction with precincts on the Sunshine Coast and Tasmania.
Overall Reputation

Figure 85: The ‘Mature Market’s’ Perception of the Overall Reputation of the Regions’ Restaurants (mean ratings; n = 97)

Figure 86: The ‘Mature Market’s’ Perception of the Overall Reputation of the Regions’ Restaurants (percentages; n = 97)

Figure 85 and Figure 86 illustrate ratings for the overall reputation of the six regions’ restaurants. While Sydney and Melbourne received the overall highest ratings for their restaurants, with more than 80% of the ‘Mature Market’ giving ratings in the ‘good’ to ‘very good/excellent’ range, more than 60% of the ‘Mature Market’ expressed this opinion about restaurants in Brisbane, Tasmania, the Gold Coast and the Sunshine Coast.
Regional Produce

Figure 87: The ‘Mature Market’s’ Perception of the Regional Produce featured in the Regions’ Restaurants (mean ratings; n = 97)

Figure 88: The ‘Mature Market’s’ perception of the regional produce featured in the regions’ restaurants (percentages; n = 97)

Figure 87 and Figure 88 illustrate ratings for regional produce offered by the six regions’ restaurants. Tasmania received the best ratings followed by Sydney and Melbourne, with about 70% to 80% of the ‘Mature Market’ viewing the presentation of regional produce in these regions as ‘good’ to ‘very good/excellent’. Furthermore, about 60% of the ‘Mature Market’ perceived restaurants in Brisbane, the Gold Coast and Sunshine Coast as ‘good’ to ‘very good/excellent’ when thinking about their local food products.
Comparisons Across Segments

Variety of Restaurants

Figure 89: Comparison across Segments - perceptions relating to the regions’ restaurant variety (mean ratings; n = 459)

Figure 89 illustrates comparisons across the segments in terms of the variety of restaurants offered by each of the six regions. Across the three segments and the six regions, Melbourne received the highest mean ratings, closely followed by Sydney. Brisbane, the Gold Coast and the Sunshine Coast were viewed as offering a good selection of restaurants, closely followed by Tasmania. Interestingly, among the three segments, the ‘Affluent Market’ appeared to favour restaurants in Brisbane, Sydney, Melbourne, and the Sunshine Coast, while the ‘Mature Market’ favoured Tasmania and the Gold Coast. When compared to the ‘Affluent Market’ and the ‘Mature Market’, the ‘Young Market’ consistently, across all six regions, gave the lowest ratings.

Information provided in Table 11 shows that most of the differences in ratings between the market segments were not statistically significant, indicating that by and large the segments had similar perceptions of the regions’ restaurant variety. Only one notable difference was identified. The Young Market perceived the restaurant variety in Tasmania considerably less favourable compared to the Affluent and the Mature Market. For a detailed description of the statistical analysis conducted, see Appendix I.

Table 11: Comparison across Segments – perception relating to the regions’ restaurant variety (mean ratings and ANOVA comparisons; n = 459)

<table>
<thead>
<tr>
<th>Restaurant Variety</th>
<th>Young Market</th>
<th>Affluent Market</th>
<th>Mature Market</th>
<th>Difference/s Between Clusters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane</td>
<td>6.68</td>
<td>6.93</td>
<td>6.91</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Sydney</td>
<td>8.04</td>
<td>8.36</td>
<td>8.06</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Melbourne</td>
<td>8.41</td>
<td>8.59</td>
<td>8.32</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Tasmania</td>
<td>5.53</td>
<td>6.17</td>
<td>6.38</td>
<td>1 ≠ 2; 1 ≠ 3; 2 = 3</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>6.64</td>
<td>6.86</td>
<td>7.02</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>6.30</td>
<td>6.85</td>
<td>6.60</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
</tbody>
</table>

Note: Symbol = in the last column means there is no statistically significant difference between segments
Symbol ≠ in the last column means there is a statistically significant difference between segments
Dining Precincts

Figure 90: Comparison across Segments – perceptions relating to the regions’ dining precincts (mean ratings; n = 459)

As illustrated in Figure 90, Melbourne, across the three segments and the six regions, received the highest mean ratings for its dining precincts, closely followed by Sydney and the Gold Coast. While the ‘Young Market’ and the ‘Affluent Market’ perceived precincts on the Sunshine Coast as slightly better than those in Brisbane, the ‘Mature Market’ thought the opposite. Furthermore, while the ‘Mature Market’ compared to the other two segments gave better ratings to precincts in Brisbane and the Gold Coast, the ‘Affluent Market’, compared to the ‘Young Market’ and the ‘Mature Market’ gave better ratings to dining precincts in Sydney, Melbourne, and the Sunshine Coast. Among the three segments, the ‘Young Market’, across all six regions, gave the lowest ratings. However, despite some small differences, statistical analysis revealed no statistically significant variation in ratings between the segments, suggesting that respondents from all market segments had similar perceptions of dining precincts in the six regions (see Table 12). For a detailed description of the statistical analysis conducted, see Appendix I.

Table 12: Comparison across Segments – perceptions relating to the regions’ dining precincts (mean ratings and ANOVA comparisons; n = 459)

<table>
<thead>
<tr>
<th>Dining Precincts</th>
<th>Young Market</th>
<th>Affluent Market</th>
<th>Mature Market</th>
<th>Difference/s Between Clusters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane</td>
<td>6.37</td>
<td>6.58</td>
<td>6.67</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Sydney</td>
<td>7.61</td>
<td>7.86</td>
<td>7.83</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Melbourne</td>
<td>8.13</td>
<td>8.19</td>
<td>7.88</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Tasmania</td>
<td>5.36</td>
<td>5.73</td>
<td>5.73</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>6.68</td>
<td>6.87</td>
<td>7.00</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>6.43</td>
<td>6.74</td>
<td>6.47</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
</tbody>
</table>

Note: Symbol ≠ in the last column means there is no statistically significant difference between segments
Symbol ≠ in the last column means there is a statistically significant difference between segments
Overall Reputation

Figure 91: Comparison across Segments – perceptions relating to the overall reputation of the regions’ restaurants (mean ratings, n = 459)

Figure 91 illustrates that across the three segments and the six regions, Melbourne restaurants were perceived as having the overall best reputation, closely followed by Sydney. All three segments perceived the reputation of Brisbane’s restaurants as slightly better compared to Gold Coast and Sunshine Coast restaurants. The ‘Mature Market’ rated restaurants in Brisbane, Tasmania, the Gold Coast, and the Sunshine Coast as having a better reputation compared to the ‘Affluent Market’ and the ‘Young Market’, while the ‘Affluent Market’ perceived the reputation of restaurants in Sydney and Melbourne more favourable compared to the ‘Mature Market’ and the ‘Young Market’. Once again, the ‘Young Market’ compared to the other two market segments gave the lowest ratings across all six regions. When looking for differences in ratings between segments, statistical analysis revealed that respondents from all market segments had similar perceptions of the reputation of restaurants in the six regions (see Table 13). For a detailed description of the statistical analysis conducted, see Appendix I.

### Table 13: Comparison across Segments – perceptions relating to the overall reputation of the regions’ restaurants (mean ratings and ANOVA comparisons n = 459)

<table>
<thead>
<tr>
<th>Regions</th>
<th>Young Market</th>
<th>Affluent Market</th>
<th>Mature Market</th>
<th>Difference/s Between Clusters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane</td>
<td>6.81</td>
<td>6.86</td>
<td>7.08</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Sydney</td>
<td>7.84</td>
<td>8.14</td>
<td>7.99</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Melbourne</td>
<td>8.17</td>
<td>8.38</td>
<td>8.23</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Tasmania</td>
<td>6.21</td>
<td>6.51</td>
<td>6.57</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>6.57</td>
<td>6.68</td>
<td>7.10</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>6.54</td>
<td>6.73</td>
<td>6.90</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
</tbody>
</table>

Note: Symbol ≠ in the last column means there is no statistically significant difference between segments
Symbol = in the last column means there is a statistically significant difference between segments
Regional Produce

Figure 92: Comparison across Segments – perceptions relating to the regions’ restaurants featuring regional produce (mean ratings; n = 459)

Across the six regions, the ‘Young Market’ and the ‘Mature Market’ rated Tasmania’s restaurants most favourably in terms of their regional produce, while for the ‘Affluent Market’ it was Melbourne closely followed by Sydney and Tasmania. Compared to the ‘Young Market’ and the ‘Affluent Market’, the ‘Mature Market’ favoured restaurants in Brisbane, Tasmania and the Gold Coast, while the ‘Affluent Market’ compared to the other two segments favoured restaurants in Sydney and Melbourne. As can be seen from Table 14, statistical analysis revealed that the Young Market differed significantly from the Affluent Market and the Mature Market in their perception of the regional produce offered by restaurants in Sydney, with the Young Market expressing considerably less favourable perceptions compared to the other two segments. Notable differences were also observed for ratings of restaurants in Melbourne. The Affluent Market perceived Melbourne’s restaurants in a considerably better light compared to the Young Market and the Mature Market. For a detailed description of the statistical analysis conducted refer to Appendix I.

Table 14: Comparison across Segments – perceptions relating to the regions’ restaurants featuring regional produce (mean ratings and ANOVA comparisons; n = 459)

<table>
<thead>
<tr>
<th>Regional Produce</th>
<th>Young Market</th>
<th>Affluent Market</th>
<th>Mature Market</th>
<th>Difference/s Between Clusters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brisbane</td>
<td>6.39</td>
<td>6.76</td>
<td>6.80</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Sydney</td>
<td>6.57</td>
<td>7.40</td>
<td>7.12</td>
<td>1 ≠ 2; 1 ≠ 3; 2 ≠ 3</td>
</tr>
<tr>
<td>Melbourne</td>
<td>6.66</td>
<td>7.47</td>
<td>6.92</td>
<td>1 ≠ 2; 1 ≠ 3; 2 ≠ 3</td>
</tr>
<tr>
<td>Tasmania</td>
<td>7.24</td>
<td>7.30</td>
<td>7.40</td>
<td>1 = 2; 1 = 3; 2 ≠ 3</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>6.37</td>
<td>6.36</td>
<td>6.64</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
<tr>
<td>Sunshine Coast</td>
<td>6.85</td>
<td>6.72</td>
<td>6.70</td>
<td>1 = 2; 1 = 3; 2 = 3</td>
</tr>
</tbody>
</table>

Note: Symbol = in the last column means there is no statistically significant difference between segments
Symbol ≠ in the last column means there is a statistically significant difference between segments

A number of interesting differences need to be highlighted when comparing the three segments (the ‘Young Market’, the ‘Affluent Market’ and the ‘Mature Market’) across the six regions (Brisbane, Sydney, Melbourne, Tasmania, the Gold Coast, and the Sunshine Coast) and across each of the four dimensions (variety of restaurants, dining precincts, overall reputation, and regional produce):

- Melbourne’s restaurants received the highest mean ratings, closely followed by Sydney,
- The ‘Young Market’ consistently gave the lowest ratings,
- Across the four dimensions, the ‘Affluent Market’ gave more favourable ratings to restaurants in Sydney and Melbourne compared to the ‘Young Market’ and the ‘Mature Market’, and
- The ‘Mature Market’ rated restaurants in Brisbane and the Gold Coast as more favourable across the four dimensions compared to the ‘Young Market’ and the ‘Affluent Market’.

For more detailed information relating to perceptions of respondents from the three market segments across each of the six regions and across each of the regions’ four dimensions, see Appendix G “Perceptions of Regions.
by Segments”, and Appendix H “Comparisons Across Segments Relating to Regional Food and Restaurant Characteristics”.

Return to Destination
In this section respondents were asked whether they had returned to a holiday destination as a result of their positive restaurant experiences.

As can be seen from Figure 93, while the majority of respondents from the ‘Affluent Market’ had returned to a holiday destination as a result of positive restaurant experiences, the majority of respondents belonging to the ‘Young Market’ had not. Furthermore, compared to the other two segments, respondents from the ‘Mature Market’ were most likely to report that they had never returned to a destination to re-experience the culinary experiences offered by the location(s).

For the ‘Young Market’, the most frequently re-visited destinations were the Gold Coast (16 respondents), the Sunshine Coast (12 respondents), Sydney (11 respondents), and Melbourne (6 respondents). Similarly to the ‘Young Market’, 28 respondents from the ‘Affluent Market’ had re-visited the Gold Coast, 22 the Sunshine Coast, and 13 respondents had returned to Tasmania. Surprisingly, only 11 respondents had re-visited Sydney, and seven Melbourne. Destinations the ‘Mature Market’ had returned to included the Gold Coast (5 respondents), the Sunshine Coast (5 respondents), Tasmania (5 respondents) and Cairns (4 respondents).

In summary, the Gold Coast and the Sunshine Coast were the most frequently re-visited holiday destinations reported by all of the three segments, with the ‘Affluent Market’ and the ‘Mature Market’ reporting Tasmania as a popular destination to revisit. Surprisingly, only a small percentage of respondents from the ‘Young Market’ and the ‘Affluent Market’ reported Sydney and Melbourne as holiday destinations they had returned to.

For a full detailing of the destinations re-visited, see Appendix J “Return to Destinations by Segments”.

Magazines Typically Read
In the final section respondents were asked what types of magazines they read on a regular basis that is, at least once a month with the exception of magazines published quarterly.
As illustrated in Figure 94, across the three segments, women’s magazines were most frequently reported to be read on a regular basis, followed by Home and Lifestyle magazines. The ‘Affluent Market’ compared to the other two segments more regularly read Food magazines, Home and Lifestyle magazines, Women’s magazines, Fashion magazines, Business and General magazines. In contrast, the ‘Young Market’ compared to the ‘Affluent Market’ and the ‘Mature Market’ more regularly read Men’s magazines, Motoring magazines, Computing magazines, Sporting and Music magazines. The ‘Mature Market’, overall, was least likely to read any type of magazine on a regular basis.
Chapter 4

Summary and Recommendations

In an attempt to identify existing and potential market segments who value culinary experiences and are influenced in their holiday destination choice by the culinary prospects the location(s) has to offer, this report has identified and described three market segments, the ‘Young Market’, the ‘Affluent Market’, and the ‘Mature Market’. The analyses revealed a number of interesting results:

Demographic Information
Respondents from the ‘Young Market’ viewed restaurants as having some to moderate importance on their holiday destination choice. This group of respondents tended to be between 18 to 34 years of age, earned between $30,000 and $50,000 per annum, and were either married or single without children. In contrast, respondents from the ‘Affluent Market’ tended to report that restaurants were moderately to very important when deciding where to spend a holiday. Respondents from the ‘Affluent Market’ were typically between 35 and 50 years of age, had a yearly income between $30,000 and $130,000, and usually were married without children. Finally, the ‘Mature Market’ represented the older age group from 51 years of age and above who considered restaurants as not important in their holiday destination choice. People in this category tended to have an income between $30,000 and $50,000 per annum, and were typically married without children.

Holiday & Short-Break Holiday Patterns
Across all three market segments respondents were found to go on holiday an average of once to twice a year. The average holiday was reported to last between one and two weeks, with respondents typically enjoying their vacation in the company of either family or partners, followed by friends. Similarly, across all three segments respondents reported to go on short-break holidays at least once a year. While the ‘Young Market’ reported to take short-break vacations with their family, followed by their partners and friends, the ‘Affluent Market’ and the ‘Mature Market’ tended to spend their short-break holidays in the company of their partners.

Restaurant Preferences & Dinner Budget
Across all three market segments, respondents reported to prefer eating at a variety of restaurants rather than one particular style. This seemed particularly important to the ‘Affluent Market’. Furthermore, considering the ‘Affluent Market’s’ comparatively high income, it was not surprising that respondents from this category reported to more frequently eat at a la carte restaurants and enjoy fine dining experiences. While a large number of respondents from the ‘Mature Market’ reported to eat at pubs and clubs, they also enjoyed dining at Asian style restaurants. In addition, the ‘Young Market’, when compared to the other two segments, was found to visit coffee shops and bistros as well as fast food restaurants and family restaurants more frequently. With regard to respondents’ dinner budget, while the ‘Young Market’ and the ‘Mature Market’ typically reported to spend between $20 and $40 per adult when dining at a restaurant, the ‘Affluent Market’ tended to spend between $30 and $60.

Influence of Printed Material
Results revealed the ‘Affluent Market’ to be most strongly influenced by printed materials such as restaurant reviews in food guides and magazines. Overall, advertisements in newspapers, magazines and dining out guides consistently exerted the strongest influence on respondents’ choice of restaurant, followed by regions’ local newspaper, with food magazines exerting the least influence.

Restaurant Characteristics
The attractiveness and the decor of the restaurant as well as the display of a menu in the window appeared to exert the strongest influence on respondents’ restaurant selection, while the availability of local food products seemed to be of least influence. Furthermore, while proximity of the restaurant to respondents’ accommodation seemed important to all three segments, it was most important to the ‘Mature Market’. Surprisingly, while the opportunity to ‘bring your own wine’ was considered more influential compared to an extensive wine list offered by the restaurant, overall, the availability of alcoholic beverages was not seen as a very influential factor in respondents’ restaurant choice.

In addition, when comparing ratings for the influence of print media with ratings for the impact of restaurant characteristics, restaurant characteristics were found to exert a far stronger influence on respondents’ restaurant selection compared to printed materials.
**Sources of Information Relied Upon**

Results revealed three information sources that respondents from the three segments tended to rely upon in their restaurant selection process. First, ‘wandering around’ looking for a place to eat, second, ‘word of mouth recommendations from friends and family’, and third, ‘recommendations from local people and business in the area’. While respondents from the ‘Affluent Market’ tended to rely most upon recommendations from local people and business in the area, for the ‘Mature Market’ and the ‘Young Market’ it was ‘wandering around’.

**Reasons for Eating Out**

Across all three segments the ‘relaxation’ aspect of the dining experience that is, to be waited on and not having to cook yourself, was rated as the most important reason for eating out while on holiday. Interestingly, eating healthy food was also considered as very important across all three segments, particularly, for the ‘Mature Market’, with discovery (i.e., trying new and exciting food that you would not cook yourself) being viewed as the least motivating factor.

**Regions’ Food & Restaurant Characteristics**

Across the three segments, Sydney and Melbourne emerged as the most popular of the six regions (Sydney, Melbourne, Brisbane, Tasmania, Gold Coast, and the Sunshine Coast) in terms of their restaurant variety, dining precincts and overall reputation. While the ‘Young Market’ and the ‘Mature Market’ perceived Tasmania as the leader with regard to their presentation of regional produce, for the ‘Affluent Market’ it was Melbourne. In addition, restaurants in Brisbane, the Gold Coast, Sunshine Coast and Tasmania were perceived as having a good reputation with respondents viewing their restaurant variety and dining precincts in a favourable light.

**Return to a Destination**

Results revealed that the majority of respondents from the ‘Affluent Market’ had returned to a holiday destination as a result of their positive restaurant experiences. In contrast, the majority of respondents from the ‘Young Market’ and particularly the ‘Mature Market’ reported that they had never returned to a holiday destination for culinary reasons.

Throughout this report it has become evident that although the three market segments share some characteristics, each segment has its own unique needs, desires and expectations that tourism and restaurant industries must respond to.

In the case of the ‘Young Market’, this segment consists of young people who, due to their lack of financial responsibility, can afford to indulge in regular travel and restaurant experiences. Rather than planning their culinary leisure time, this segment appears to be more spontaneous. When selecting a restaurant, the ‘Young Market’ does not tend to consult magazines and newspapers to any great extent but prefers to ‘have a look for themselves’. This segment seems to like to wander and explore places, waiting for the right establishment to capture their attention. Results of this report revealed that what the ‘Young Market’ is looking for are establishments that radiate an attractive atmosphere and are palatable to the eye and senses. Additionally, the ‘Young Market’ wants to have an idea of what a restaurant has to offer before committing themselves to the experience. Thus, the ‘Young Market’ responds well to the display of a menu in the window, in particular, when the menu reveals a large variety of culinary delights. While the availability of alcoholic beverages seems to be of some importance, the ‘Young Market’, overall, appears to appreciate the opportunity to take along their own wine. However, saying this, there are also those who might enjoy the prospect of being able to select a good bottle of wine from an extensive wine list provided by the restaurant. When asking what it is that drives and motivates the ‘Young Market’ to visit restaurants, this segment has been found to treasure the ‘relaxation’ aspect of the dining experience, that is, to sit back, be served and waited on. It follows that attentive, friendly and efficient waiting staff are nothing less but imperative. Besides wanting to be pampered, the ‘Young Market’ is also health conscious and thus views eating healthy food as an important aspect of the dining experience even when on holiday. At the same time this segments enjoys trying new, different and exotic types of food, particularly in the company of friends and family. On the whole, for the ‘Young Market’ feeling satisfied in the culinary department is an important part of the overall holiday experience, without which the holiday would be only half as much fun. To summarise, the ‘Young Market’ is a segment with great potential. Capture their eye and attention and you are in business. Satisfy their senses and treat them well and they might even come back for a second adventure but will definitely recommend you to their friends.

What about the ‘Affluent Market’? This segment of the market does not have to be convinced that the enjoyment of culinary delights is an important part of life. Having already seen and experienced a lot, the ‘Affluent Market’ not merely follows the eye and senses but draws on various information sources to locate those restaurants and destinations most likely to satisfy their culinary cravings. Due to their comparatively high income, the ‘Affluent Market’ has the means to seek out a la carte restaurants and immerse themselves in fine dining experiences. However, the restaurant does not have to be five stars! This market segment seems to
respond to good reports in newspapers, food magazines, food guides and even local newspapers to find that establishment that is able to make those ‘taste buds dance’. While influenced by the media, gourmet travellers like to hear it from the ‘source’ and, therefore, heavily rely on ‘recommendations from local people and business in the area’ as well as ‘word of mouth recommendations from friends and family’. While busy with the culinary aspects, the restaurant needs to please the eye as well. In other words, an attractive décor as well as an enticing atmosphere will do a lot to convince the gourmet traveller that this is the establishment that will provide the so much longed for culinary experience. However, before selecting the establishment, gourmet travellers like to take a look if the menu is what they desire. With regard to alcoholic beverages, while the ‘Affluent Market’ enjoys choosing wine from an extensive list provided by the restaurant, this does not seem an essential feature. Besides the culinary aspect, what other reasons does this segment have to dine at restaurants? Similarly to the ‘Young Market’, the ‘Affluent Market’ greatly values the relaxation aspect of the dining experience, that is, to be waited on and not having to cook themselves, and considers dining out as an integral part of the overall holiday experience best enjoyed in the company of friends and family. While the ‘Affluent Market’ enjoys indulging in new and different types of food this is not done at the expense of eating healthily. In summary, the ‘Affluent Market’ knows what they want. They are experienced gourmet travellers who value and seek out culinary experiences and, therefore, tend to plan accordingly. While the restaurant does not have to be five star, excellent service and an attractive and inviting atmosphere and exterior are of vital importance to be in business with this segment.

Finally, what is there to say about the ‘Mature Market’? The ‘Mature Market’ is a segment with great potential that awaits to be explored and conquered. To attract the attention of this market segment, however, requires sensitivity. Not only is the ‘Mature Market’ restricted in its spending power but there are health and dietary needs that need to be considered. Thus, restaurants aiming to conquer this segment of the market should, for example, provide menus that consider dietary restrictions and offer palatable but also healthy food. While the ‘Mature Market’ likes to seek out restaurants with an inviting and attractive atmosphere, being conscious of their budgetary restrictions, the display of a menu in the window combined with a large variety of food is of great importance to attract this market segment’s attention. As the ‘Mature Market’ seems to heavily rely on ‘wandering around’ in order to find a suitable restaurant to dine, the proximity of the restaurant to patrons’ accommodation is of vital importance. Besides ‘wandering around’, the ‘Mature Market’ also likes to rely on ‘word of mouth recommendations from friends and family’ as well as ‘recommendations from local people and business’s in the area’. Like the ‘Young Market’ and the ‘Affluent Market’, the ‘Mature Market’ highly values the ‘relaxation’ aspect of the dining experience and considers eating out as an integral part of the overall holiday experience best enjoyed in the company of family and friends. In summary, businesses and industries eager to capture the ‘Mature Market’ need to engage in extensive research and preparation to cater for the segment’s many needs. In the light of a rapidly aging population this appears to be a well-worth effort.

Despite the many differences between segments, there are some similarities that need to be highlighted. Consumers across all segments stressed the importance of restaurants having an attractive décor combined with an inviting atmosphere. Furthermore, the display of a menu in the window that provides consumers with the opportunity to explore the foods on offer as well as the prices charged was consistently reported as very important. Respondents also agreed that a central motive for dining at a restaurant was to be able to sit back and to be served and pampered. Thus, it follows that well trained, friendly, and efficient staff that are attentive and sensitive to consumers’ needs are a vital part of any food business that wants to make a name for itself. This seems particularly important in the light of results suggesting that major information source tourists rely upon when selecting restaurants consists of recommendations from local people as well as friends and family. Furthermore, consumers are health conscious with results suggesting that even while on holiday, people highly value eating healthy food. In summary, this report has shown that restaurant experiences are a vital part of consumers’ holiday experiences, and thus contribute to the attractiveness of a tourist destination. While the ‘Affluent Market’ represents a segment eager to engage in culinary travel experiences, the ‘Young Market’ and, in particular, the ‘Mature Market’ are segments of great potential that await to be further explored.
Appendix A: Interview Questionnaire

Consumer Questionnaire as viewed by interviewer on computer screen

SCREEN #1
Hello. My name is….and I am calling from Griffith University. I am conducting a study about holiday experiences and dining out. This study is part of a larger University project; no selling or marketing is involved. I’d just like to ask some questions which should take about 10 -15 minutes. I would appreciate if you could participate for a short while.

SCREEN #2
Firstly, how often do you go on holiday for 5 nights or more?
1: never
2: less than once every 5 years
3: once every 3-5 years
4: once every 2 years
5: once a year
6: twice a year
7: more than twice a year
(Enter corresponding number)

SCREEN #3
What is the average length of time you spend on your holiday? Remember, these are holidays for 5 nights or more.
1: 5 or more weeks
2: 4 weeks
3: 3 weeks
4: 2 weeks
5: 1-2 weeks
6: under 1 weeks (i.e., 5-6 days)
7: n/a
(Enter corresponding number)

SCREEN #4
Who do you usually go on these holidays with? I have some categories I would like to read out if you could pick one which best suits you.
1: your partner
2: your family
3: your friends
4: you usually go alone
5: partner and friends
6: family and friends
7: other
8: n/a
(Enter corresponding number)

SCREEN #5
Do you ever go on short-break holidays? (that is, a holiday where you stay overnight for anywhere between 1 and 4 nights)?
Press 1 for yes
Press 2 for no

SCREEN #6
How often?
1: less than once every 5 years
2: once every 3-5 years
3: once ever 2 years
4: once a year
5: twice times a year
6: three times a year
7: four times a year
8: five or more times a year
9: n/a
(Enter corresponding number)
SCREEN #7
Who do you usually go on short-breaks with? I will read out some categories again if you could pick one that best suits you.
1: your partner
2: your family
3: your friends
4: you usually go alone
5: partner and friends
6: family and friends
7: other
8: n/a
(Enter corresponding number)

SCREEN #8
What kind of restaurant do you usually eat at while on holiday?
(Obtain specific answers; no more than 2 or 3 types of restaurants)
(Type in answer; press ENTER)
(PARAPHRASE ANSWER to ensure accurateness)

SCREEN #9
I am going to ask you a series of questions now, which relate to your holiday experiences and dining out. When I ask you these questions, I would like you to think about domestic travel, that is, your holidays within Australia.

When selecting restaurants, there are many different sources of information that people use to help them make their choice. I am interested in how different elements influence your CHOICE OF RESTAURANT WHEN YOU ARE ON HOLIDAY. This first lot of questions are to do with printed material. I have a rating scale that I would like you to use, that is between 1 and 6, where 1 means it does not influence you at all and 6 means it has an extreme influence on you. Do you understand? (Pause) So the rating scale is from 1 to 6, and you can use any number between 1 and 6; 1 meaning no influence and 6 meaning an extreme influence.

SCREEN #10
To what degree do restaurant reviews in the region’s local newspaper (influence your choice of restaurant when you are on holiday)?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

SCREEN #11
To what degree do restaurant reviews in food guides, such as the Good Food Guide, influence your choice?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

SCREEN #12
To what degree do restaurant reviews in food magazines, such as the Gourmet Traveller or the Australian Table influence your choice of restaurant while you are on holiday?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

SCREEN #13
To what degree do references to the reputation of the chef in newspapers or magazines influence your choice?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

SCREEN #14
To what degree do advertisements that you see in newspapers, magazines or tourist dining out guides influence your choice of restaurant while on holiday?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)
Another way tourists find out information about restaurants is by walking around clusters of restaurants and looking at all the different styles. These second lot of questions are to do with that. So, when you are on holiday, to what degree do the following elements influence your choice of restaurant? The same rating scale will be used, where 1 means it does not influence you at all and 6 means it has an extreme influence on you. OK?
Now, this is when you are walking around looking at restaurants.

To what degree does the display of a menu in the window influence your choice of restaurant when you are on holiday?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

When choosing a restaurant, to what degree does evidence of a wide variety of food on the menu influence your choice?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

When choosing a restaurant when on holiday, to what degree does the restaurant looking busy influence your choice (that is, it looks like there are lots of diners there)?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

To what degree does the restaurant having an attractive décor or atmosphere influence your choice?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

Now I just have a few general questions about choosing restaurants when you are on holiday. The same 1 to 6 scale will be used again
(Questionnaire automatically moves on; do not press any key)

To what degree does the opportunity to Bring Your Own (BYO) wine influence your choice of restaurant when you are on holiday?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

When choosing a restaurant, how influential is it that the restaurant has an extensive wine list on offer?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)
SCREEN #24
How influential is it to your choice of restaurant that the location of the restaurant is within walking distance of your accommodation?
1 = does not influence me at all
6 = has an extreme influence on me
7 = not applicable, don’t know
(Enter corresponding number between 1 and 7)

SCREEN #25
Now I would like to know what information source you typically use when you select restaurants. I have a list that I am going to read out to you and I would like you to choose one option that best suits you. Out of the following list, which information source do you rely upon most when choosing restaurants when on holiday?
(Read out options in random order to prevent order bias)
Dining out guides
Newspaper articles or ads
Recommendations from local people or businesses in the area
Word of mouth from friends and/or relatives
Wandering around until you find something nice
Internet
Magazines such as the Gourmet Traveller, Vogue
Past experience
Other (type in)
None/Move on to next question
(Move arrow key to highlight; press ENTER)
What is your second choice (highlight line; press ENTER)
What is your third choice? (highlight line; ENTER)
(Obtain up to 3 answers; then highlight and ENTER “Move on”)

SCREEN #26
I would also like to know why you eat out when you are on holiday. Other than the fact that you have to eat, there are lots of reasons why people eat out when on holidays. Please rate the following reasons in terms of importance – 1 means it is not important at all and 6 means it is extremely important. You can pick any number between 1 and 6. So 1 means not important, 6 means very important. And this is for reasons for eating out when on holidays.
(Press any key to continue)

SCREEN #27
How important to you is indulgence (i.e., either fine dining or just the feeling of spoiling yourself)?
1 = not important at all
6 = extremely important
7 = not applicable; don’t know
(Enter corresponding number between 1 and 7)

SCREEN #28
How important is relaxation and comfort (i.e., to be waited on, not having to cook yourself)?
1 = not important at all
6 = extremely important
7 = not applicable; don’t know
(Enter corresponding number between 1 and 7)

SCREEN #29
How important to you is the experience (i.e., eating out is part of the overall holiday experience)?
1 = not important at all
6 = extremely important
7 = not applicable; don’t know
(Enter corresponding number between 1 and 7)

SCREEN #30
How important to you is the social reason (i.e., the chance to mix and talk with friends and family)
1 = not important at all
6 = extremely important
7 = not applicable; don’t know
(Enter corresponding number between 1 and 7)
**RESTAURANTS AS A CONTRIBUTOR TO A TOURIST DESTINATION’S ATTRACTIVENESS:**

| SCREEN #31 | How important to you is discovery (i.e., trying new, exciting or different foods that you would not cook yourself)?
|-------------|-------------------------------------------------------------------------------------------------|
|             | 1 = not important at all  
|             | 6 = extremely important  
|             | 7 = not applicable; don’t now  
|             | (Enter corresponding number between 1 and 7)                                                  |

| SCREEN #32 | How important to you is health (i.e., eating healthy food)?
|-------------|-----------------------------------------------------------------------------------------------|
|             | 1 = not important at all  
|             | 6 = extremely important  
|             | 7 = not applicable; don’t know  
|             | (Enter corresponding number between 1 and 7)                                                  |

| SCREEN #33 | Now I would like to move onto your perception of food and restaurants for various regions around Australia. I would like you to rate each region on certain restaurant characteristics. The scale I would like you to use this time is from 1 to 10; 1 is a low rating and 10 is a high rating. You can choose any number between 1 and 10. So 1 means low rating and 10 means high rating.  
|-------------|-----------------------------------------------------------------------------------------------|
|             | (Press any key when ready to proceed)  
|             | (Note, regions are presented in random order to prevent order bias)                          |

| SCREEN #34 | How would you rate Brisbane as having a good variety of restaurants?  
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| SCREEN #35 | How would you rate Sydney as having a good variety of restaurants?  
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| SCREEN #36 | How would you rate Melbourne as having a good variety of restaurants?  
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| SCREEN #37 | How would you rate Tasmania as having a good variety of restaurants?  
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| SCREEN #38 | How would you rate the Gold Coast as having a good variety of restaurants?  
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| SCREEN #39 | How would you rate the Sunshine Coast as having a good variety of restaurants?  
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| SCREEN #40 | How would you rate Brisbane as having good dining precincts (i.e., where restaurants are all clustered together)?  
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| SCREEN #41 | How would you rate Sydney as having good dining precincts (i.e., where restaurants are all clustered together)?  
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| SCREEN #42 | How would you rate Melbourne as having good dining precincts (i.e., where restaurants are clustered together)?  
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<tr>
<td></td>
<td>(Enter a number between 1 and 10; 99 = no answer)</td>
</tr>
</tbody>
</table>

| SCREEN #43 | How would you rate Tasmania as having good dining precincts (i.e., where restaurants are all clustered together)?  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Enter a number between 1 and 10; 99 = no answer)</td>
</tr>
</tbody>
</table>

| SCREEN #44 | How would you rate the Gold Coast as having good dining precincts (i.e., where restaurants are all clustered together)?  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Enter a number between 1 and 10; 99 = no answer)</td>
</tr>
</tbody>
</table>

| SCREEN #45 | How would you rate the Sunshine Coast as having good dining precincts (i.e., where restaurants are all clustered together)?  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Enter a number between 1 and 10; 99 = no answer)</td>
</tr>
</tbody>
</table>
Phase Three (Pt II) Market Segments

SCREEN #46
Overall, how would you rate the reputation of Brisbane’s restaurants?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #47
Overall, how would you rate the reputation of Sydney’s restaurants?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #48
Overall, how would you rate the reputation of Melbourne’s restaurants?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN # 49
Overall, how would you rate the reputation of Tasmania’s restaurants?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #50
Overall, how would you rate the reputation of Gold Coast restaurants?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #51
Overall, how would you rate the reputation of Sunshine Coast restaurants?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #52
How would you rate Brisbane’s restaurants in terms of having regional produce featured in their menus?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #53
How would you rate Sydney’s restaurants in terms of having regional produce featured in their menus?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #54
How would you rate Melbourne’s restaurants in terms of featuring regional produce in their menus?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #55
How would you rate Tasmania’s restaurants in terms of featuring regional produce in their menus?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN # 56
How would you rate Gold Coast restaurants in terms of featuring regional produce in their menus
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #57
How would you rate Sunshine Coast restaurants in terms of featuring regional produce in their menus?
(Enter a number between 1 and 10; 99 = no answer)

SCREEN #58
Overall, all things considered, how important are restaurants to you in helping you choose a holiday
destination?
1 = not important at all
10 = extremely important
11 = do not know/cannot answer
(Enter a number between 1 and 10)

SCREEN #59
Have your positive restaurant experiences in a destination had a significant influence on your decision to return
to that same destination?
Press 1 for yes
Press 2 for no
Press 3 for not sure/other
(Enter corresponding number)

SCREEN #60
Which destination was that?
(Type in name of destination(s))

SCREEN #61
When on holiday, how much do you typically spend when eating dinner at a restaurant, per adult?
(Type in answer with decimal place then press ENTER)

SCREEN #62
Nearly finished now! Can you tell me which magazines you read at least once a month?
Food magazines: Gourmet Traveller, Good Taste
Home and Lifestyle: House and Garden, Home Beautiful, Better Homes
Women’s:
Fashion:
Business:
Men’s:
Motoring:
Computing
Sporting
Music
General:
N/A Move onto next question
(Move arrow key to highlight line; press ENTER)
(Obtain up to three answers; then highlight and ENTER “N/A Move on”)

SCREEN # 63
Lastly I would like to ask you some questions about you. If you decide there is a question that you do not want to answer, just say so at the time.
(Press any key when ready to proceed)

SCREEN #64
How would you classify your current life stage? Would you be a…..
1: young person (under age 35) living alone or sharing?
2: young person (under age 35) living with parents?
3: young couple (under age 35) no children
4: family – with children living at home
5: mature person (age 35+) who is single
6: mature couple (age 35+) – either children have left home or no children
7: refuse
(Enter corresponding number)

SCREEN #65
Which age range are you in? (read out categories)
1: under 25
2: 25-34
3: 35-50
4: 51-64
5: 65+
6: refuse
(Enter corresponding number)

SCREEN #66
Are you: (read out categories)
1: married/living with a partner
2: single
3: divorced/separated
4: widowed
5: refuse
(Enter corresponding number)

SCREEN #67
Which category would your income be in (read out categories)
1: under $30 000
2: $31-50 000
3: $51-70 000
4: $71-90 000
5: 91-110 000
6: 111-130 000+
7: refuse
8: n/a
(Enter corresponding number)

SCREEN #68
Which category would your combined income be in? (read out categories)
1: under $30 000
2: $31-50 000
3: $51-70 000
4: $71-90 000
5: $91-110 000
6: $111-130 000+
### SCREEN #69
How would you classify your current occupation? (read out categories)
1: unemployed/home duties
2: blue collar
3: tradesperson
4: white collar
5: professional
6: retired/pensioner
7: refuse
(Enter corresponding number)

### SCREEN #70
Do you have any dependents? If so, how many? (Type in answer, then press ENTER)

### SCREEN #71
Male or female? Press 1 if male, 2 if female (Do not ask this question!)

### SCREEN #72
That is all the questions I have for today. Thank you very much for your time and the valuable information you gave me.
Appendix B: Market Segments’ Restaurant Preferences

Table 15: Types of Restaurants the Three Market Segments Eat at When on Holiday – frequency data and percentages

<table>
<thead>
<tr>
<th>Restaurant Type</th>
<th>‘Young Market’ (n = 195)</th>
<th>‘Affluent Market’ (n = 167)</th>
<th>‘Mature Market’ (n = 97)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A la Carte</td>
<td>.96% (3)</td>
<td>7.6% (19)</td>
<td>2.04% (3)</td>
</tr>
<tr>
<td>Asian *</td>
<td>18.2% (57)</td>
<td>14.8% (37)</td>
<td>18.9% (28)</td>
</tr>
<tr>
<td>Australian Cuisine</td>
<td></td>
<td>.68% (1)</td>
<td></td>
</tr>
<tr>
<td>Coffee shops/Bistros</td>
<td>6.4% (20)</td>
<td>3% (7)</td>
<td>4.1% (6)</td>
</tr>
<tr>
<td>European</td>
<td>1.28% (4)</td>
<td>3% (97)</td>
<td>2.04% (3)</td>
</tr>
<tr>
<td>Family Restaurants</td>
<td>6.4% (20)</td>
<td>3% (7)</td>
<td>2.7% (4)</td>
</tr>
<tr>
<td>Fast Food</td>
<td>6.7% (21)</td>
<td>2% (5)</td>
<td>4.1% (6)</td>
</tr>
<tr>
<td>Hotel Restaurants</td>
<td></td>
<td>.4% (1)</td>
<td>6.8% (10)</td>
</tr>
<tr>
<td>Italian</td>
<td>12.8% (40)</td>
<td>15% (37)</td>
<td>6.8% (10)</td>
</tr>
<tr>
<td>Mexican</td>
<td>1.6% (5)</td>
<td>2.4% (6)</td>
<td></td>
</tr>
<tr>
<td>Middle Eastern</td>
<td>.32% (1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motel Restaurants</td>
<td>.64% (2)</td>
<td>.8% (2)</td>
<td>6.12% (9)</td>
</tr>
<tr>
<td>Pubs/Clubs</td>
<td>10.8% (34)</td>
<td>7% (17)</td>
<td>17% (25)</td>
</tr>
<tr>
<td>Seafood</td>
<td>4.8% (15)</td>
<td>8% (20)</td>
<td>8.2% (12)</td>
</tr>
<tr>
<td>Resort Restaurants</td>
<td>.64% (2)</td>
<td>1.2% (3)</td>
<td></td>
</tr>
<tr>
<td>Smorgasbord/Buffet</td>
<td>2.6% (8)</td>
<td>2.8% (7)</td>
<td>2.7% (4)</td>
</tr>
<tr>
<td>Steak Restaurants</td>
<td>2.24% (7)</td>
<td>1.6% (4)</td>
<td>1.36% (2)</td>
</tr>
<tr>
<td>Takeaway</td>
<td>4.5% (14)</td>
<td>.8% (2)</td>
<td>.68% (1)</td>
</tr>
<tr>
<td>Variety</td>
<td>18.5% (58)</td>
<td>26% (65)</td>
<td>21.7% (32)</td>
</tr>
<tr>
<td>Vegetarian</td>
<td></td>
<td>4% (1)</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100% (311)</strong></td>
<td><strong>100% (247)</strong></td>
<td><strong>100% (147)</strong></td>
</tr>
</tbody>
</table>

For breakdown of Asian category see Table 16.

Table 16: Asian Types of Restaurants Respondents from the Three Segments Typically Eat at When on Holidays – frequency data and percentages

<table>
<thead>
<tr>
<th>Asian Type Restaurants</th>
<th>‘Young Market’</th>
<th>‘Affluent Market’</th>
<th>‘Mature Market’</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chinese</td>
<td>47.36% (27)</td>
<td>35.1% (13)</td>
<td>50% (14)</td>
</tr>
<tr>
<td>Asian in general</td>
<td>19.25% (11)</td>
<td>24.3% (9)</td>
<td>25% (7)</td>
</tr>
<tr>
<td>Thai</td>
<td>21% (12)</td>
<td>24.3% (9)</td>
<td>14.4% (4)</td>
</tr>
<tr>
<td>Japanese</td>
<td>3.5% (2)</td>
<td>10.8% (4)</td>
<td>7.2% (2)</td>
</tr>
<tr>
<td>Indian</td>
<td>8.75% (5)</td>
<td>5.4% (2)</td>
<td>3.6% (1)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100% (57)</strong></td>
<td><strong>100% (37)</strong></td>
<td><strong>100% (28)</strong></td>
</tr>
</tbody>
</table>

Table 15 and Table 16 provide detailed information about the number and percentage of respondents from the three market segments (the ‘Young Market’, the ‘Affluent Market’, and the ‘Mature Market’) that typically eat at each of the different types of restaurants listed when on holiday. As groups differed in terms of their sample size (‘Young Market’ = 195 respondents; ‘Affluent Market’ = 167 respondents; ‘Mature Market’ = 97 respondents), percentages refer to the percent of people within each market segment that typically eat at a particular type of restaurant. For example, 18.2% of respondents that belong to the ‘Young Market’, reported to typically eat at Asian restaurants, compared to only 14.8% of respondents from the ‘Affluent Market’. In addition, Table 16 provides a breakdown of the “Asian” category found in Table 15.
Appendix C: Comparison Between Market Segments – Reliance on Print Media

Table 17: Tukey’s Honestly Significant Difference Test for Comparisons Between Market Segments’ Ratings of the Print Media Used to Select Restaurants While on Holiday (n = 459)

<table>
<thead>
<tr>
<th>Dependent Variable</th>
<th>Segment Type</th>
<th>Segment Type</th>
<th>P-Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertisement</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.984</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.002*</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.001*</td>
</tr>
<tr>
<td>Chef’s Reputation</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.000*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.057</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.000*</td>
</tr>
<tr>
<td>Food Magazines</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.000*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.321</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.000*</td>
</tr>
<tr>
<td>Food Guides</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.007*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.112</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.000*</td>
</tr>
<tr>
<td>Region’s Paper</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.098</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.351</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.007*</td>
</tr>
</tbody>
</table>

* Significant results
Appendix D: Comparison Between Market Segments – Importance of Restaurant Characteristics

Table 18: Tukey’s Honestly Significant Difference Test for Comparisons Between Market Segments’ Ratings of the Importance of Restaurant Characteristics when Selecting a Restaurant (n = 459)

<table>
<thead>
<tr>
<th>Dependent Variable</th>
<th>Segment Type</th>
<th>Segment Type</th>
<th>P-Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variety of Food</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.110</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.000*</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.042*</td>
</tr>
<tr>
<td>Atmosphere/Decor</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.128</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.771</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.061</td>
</tr>
<tr>
<td>Looking Busy</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.002*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.998</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.011*</td>
</tr>
<tr>
<td>Local Food Products</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.002*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.224</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.409</td>
</tr>
<tr>
<td>Display of Menu</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.790</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.815</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.998</td>
</tr>
</tbody>
</table>

* Significant results
### Appendix E: Comparison Between Market Segments – Importance of Location and Alcoholic Beverages

Table 19: Tukey’s Honestly Significant Difference Test for Comparisons Between Market Segments’ Ratings of the Importance of Location and Alcoholic Beverages When Selecting Restaurants While on Holiday (n = 459)

<table>
<thead>
<tr>
<th>Dependent Variable</th>
<th>Segment Type</th>
<th>Segment Type</th>
<th>P-Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.982</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.890</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.821</td>
</tr>
<tr>
<td>Wine List</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.000*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.619</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.000*</td>
</tr>
<tr>
<td>BYO Wine</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.085</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.242</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.003*</td>
</tr>
</tbody>
</table>

* Significant results
Appendix F: Comparison Between Market Segments – Reasons for Eating Out While on Holiday

Table 20: Tukey’s Honestly Significant Difference Test for Comparisons Between Market Segments’ Ratings of the Importance of Various Reason for Eating out While on Holiday (n = 459)

<table>
<thead>
<tr>
<th>Dependent Variable</th>
<th>Segment Type</th>
<th>Segment Type</th>
<th>P-Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indulgence</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.009*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.542</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.002*</td>
</tr>
<tr>
<td>Healthy Food</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.014*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.006*</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.769</td>
</tr>
<tr>
<td>Relaxation</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.051</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.867</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.041*</td>
</tr>
<tr>
<td>Experience</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.002*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.088</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.000*</td>
</tr>
<tr>
<td>Discovery</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.219</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.044*</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.001*</td>
</tr>
<tr>
<td>Social Reason</td>
<td>Young Market</td>
<td>Affluent Market</td>
<td>.004*</td>
</tr>
<tr>
<td></td>
<td>Young Market</td>
<td>Mature Market</td>
<td>.310</td>
</tr>
<tr>
<td></td>
<td>Affluent Market</td>
<td>Mature Market</td>
<td>.000*</td>
</tr>
</tbody>
</table>

* Significant results
Appendix G: Perceptions of Regions by Segments

The following series of graphs illustrate the market segments’ perceptions of each of the six regions’ restaurant variety, dining precincts, overall reputation, and regional produce in detail.

Brisbane

Figure 95: The ‘Young Market’ s’ Perception of Restaurants in Brisbane (percentages; n = 195)

As illustrated in Figure 95, about 50% of respondents from the ‘Young Market’ perceived Brisbane to have a ‘good’ to ‘very good/excellent’ variety of restaurants and dining precincts. Furthermore, 50% of respondents rated Brisbane’s restaurants as ‘good’ to ‘very good/excellent’ in terms of featuring regional produce in their menus. In addition, looking at ratings relating to the overall reputation of Brisbane’s restaurants, 70% of the ‘Young Market’ gave ratings in the ‘good’ to ‘very good/excellent’ range.

Figure 96: The ‘Affluent Market’ s’ Perception of Brisbane’s Restaurants (percentages; n = 167)

As illustrated in Figure 96, more than 70% of respondents from the ‘Affluent Market’ gave ‘moderate’ to ‘good’ ratings for Brisbane’s restaurants across all of the four dimensions, with approximately 10-15% giving ‘very good/excellent’ ratings.
Brisbane’s restaurants received the highest ratings for the overall reputation of their restaurants as well as the presentation of regional produce, with more than 60% of respondents from this segment giving ratings between ‘good’ and ‘very good/excellent’.

**Figure 97: The ‘Mature Market’s’ Perception of Brisbane’s Restaurants (percentages; n = 97)**

Figure 97 illustrates that across all four dimensions more than 70% of respondents from the ‘Grey Power’ gave ratings ranging from ‘moderate’ to ‘good’. While close to 60% of respondents perceived the variety of Brisbane’s restaurants and its dining precincts as ‘good’ or ‘very good/excellent’, close to 70% rated the presentation of regional food as ‘good’ to ‘very good/excellent’. Finally, Brisbane received the highest ratings for the overall reputation of its restaurants, with more than 70% of respondents giving ratings in the ‘good’ to ‘very good/excellent’ range.

**Sydney**

**Figure 98: The ‘Young Market’s’ Perception of Sydney’s Restaurants (percentages; n = 195)**

Figure 98 illustrates that Sydney received the highest ratings for its large variety of restaurants, with about 50% of respondents from the ‘Young Market’ perceiving Sydney as having a ‘very good/excellent’ restaurant selection. Sydney also received very high ratings for its dining precincts and overall reputation of restaurants, as indicated by approximately 90% of respondents giving ratings in the ‘good’ to ‘very good/excellent’ range. In
contrast, about 90% of respondents perceived Sydney’s restaurants as being ‘moderate’ to ‘good’ in terms of offering local food products in their menus.

**Figure 99: The ‘Affluent Market’s’ Perception of Sydney’s Restaurants (percentages; n = 167)**

About 90% of the ‘Affluent Market’ perceived Sydney to have a ‘good’ to ‘very good/excellent’ selection of restaurants and dining precincts. Just over 70% of the ‘Affluent Market’ rated Sydney’s restaurants as ‘good’ to ‘very good/excellent’ in terms of featuring regional produce in their menus, and 90% reported to perceive the overall reputation of Sydney’s restaurants as ‘good’ or ‘very good/excellent’.

**Figure 100: The ‘Mature Market’s’ Perception of Sydney’s Restaurants (percentages; n = 97)**

Approximately 80% of respondents from the ‘Mature Market’ perceived Sydney to have a ‘good’ to ‘very good/excellent’ variety of restaurants. Furthermore, while 80% of the ‘Mature Market’ perceived Brisbane’s dining precincts as ‘good’ to ‘very good/excellent’, less than 70% gave high ratings for the presentation of local food products in Brisbane’s restaurants.
Melbourne

Figure 101: The ‘Young Market’s’ Perception of Melbourne’s Restaurants (percentages; n = 195)

As illustrated in Figure 101, 90% of the ‘Young Market’ perceived the variety of Melbourne’s restaurants, its dining precincts and overall reputation as ‘good’ to ‘very good/excellent’. In contrast, in terms of featuring regional produce, only close to 60% of respondents from the ‘Young Market’ viewed Melbourne’s restaurant as ‘good’ or ‘very good/excellent’.

Figure 102: The ‘Affluent Market’s Perception of Melbourne’s Restaurants (percentages; n = 167)

As illustrated in Figure 102, 65% of respondents from this market segment rated the variety of restaurants in Melbourne as ‘very good/excellent’. Furthermore, Melbourne received top ratings for its dining precincts and overall reputation of restaurants, as indicted by approximately 90% of respondents giving ratings in the ‘good’ to ‘very good/excellent’ range. In contrast, just over 70% of respondents from the ‘Affluent Market’ rated Melbourne’s restaurants as ‘good’ to ‘very good/excellent’ in terms of presenting local food products.
Figure 103 illustrates that between 80% to 90% of the ‘Mature Market’ perceived Melbourne to have a ‘good’ to ‘very good/excellent’ variety of restaurants and dining precincts. More than 90% perceived the overall reputation of Melbourne’s restaurants as ‘good’ or ‘very good/excellent’. In contrast, just over 60% gave high ratings for the presentation of regional produce in Melbourne’s restaurants.

Tasmania

As can be seen from Figure 104, the vast majority of respondents belonging to the ‘Young Market’ rated the variety of restaurants in Tasmania and Tasmania’s dining precincts in the ‘moderate’ to ‘good’ range. While ratings for the overall reputation of Tasmania’s restaurants were higher, with close to 50% of respondents giving ratings in the ‘good’ to ‘very good/excellent’ range, Tasmanian restaurants received their highest ratings for featuring regional produce in their menus.
RESTAURANTS AS A CONTRIBUTOR TO A TOURIST DESTINATION’S ATTRACTIVENESS:

Figure 105: The ‘Affluent Market’s’ Perception of Tasmania’s Restaurants (percentages; n = 167)

As illustrated in Figure 105, more than 70% of respondents rated the variety of restaurants in Tasmania in the ‘moderate’ to ‘good’ range, and just under 70% of the ‘Affluent Market’ perceived Tasmania’s dining precincts as ‘moderate’ or ‘good’. While approximately 50% of respondents from this segment rated the overall reputation of Tasmanian restaurants as ‘good’ to ‘very good/excellent’, Tasmania received its highest ratings for its diverse and rich presentation of local food products.

Figure 106: The ‘Mature Market’s Perception of Tasmania’s Restaurants (percentages; n = 97)

Figure 106 reveals that around 70% of respondents from the ‘Mature Market’ perceived the variety of restaurants in Tasmania and its dining precincts in the ‘moderate’ to ‘good’ range. While 60% of the ‘Mature Market’ viewed Tasmania’s restaurants as having a ‘good’ to ‘very good/excellent’ overall reputation, Tasmanian restaurants received the best ratings for featuring regional produce.
Gold Coast

Figure 107: The ‘Young Market’s Perception of Gold Coast Restaurants (percentages; n = 195)

As illustrated in Figure 107, close to 60% of respondents from the ‘Young Market’ viewed the Gold Coast as having a ‘good’ to ‘very good/excellent selection of restaurants and dining precincts. While approximately 60% of respondents also viewed the overall reputation of restaurants on the Gold Coast as ‘good’ to ‘very good/excellent’, only 50% gave top ratings to the presentation of regional produce in Gold Coast restaurants.

Figure 108: The ‘Affluent Market’s Perception of Gold Coast Restaurants (percentages; n = 167)

Figure 108 shows that 60% of the ‘Affluent Market’ perceived the Gold Coast as having a ‘good’ to ‘very good/excellent’ variety of restaurants and dining precincts. Furthermore, 60% of the ‘Affluent Market’ rated the overall reputation of Gold Coast restaurants as ‘good’ to ‘very good/excellent’, with slightly less than 60% of respondents from this segment giving top ratings to the regional produce presented.
As illustrated in Figure 109, approximately 60% of respondents from the ‘Mature Market’ rated the overall reputation of Gold Coast restaurants, the variety of restaurants the Gold Coast has to offer and its dining precincts as ‘good’ to ‘very good/excellent’. In contrast, slightly lower ratings were given for the regional produce offered by Gold Coast restaurants.

**Sunshine Coast**

As can be seen from Figure 110, approximately 50% of respondents from the ‘Young Market’ perceived the variety of restaurants on the Sunshine Coast and its dining precincts as ‘good’ to ‘very good/excellent’. While more than 50% rated the overall reputation of Sunshine Coast restaurants as ‘good’ to ‘very good/excellent’, more than 60% gave top ratings for the regional produce presented.
As illustrated in Figure 111, close to 60% of respondents from the ‘Affluent Market’ perceived the Sunshine Coast as offering a ‘good’ to ‘very good/excellent’ selection of restaurants and dining precincts. Furthermore, over 60% of respondents rated Sunshine Coast restaurants as ‘good’ to ‘very good/excellent’ in terms of offering regional produce.

As illustrated in Figure 112, just over 50% of respondents from the ‘Mature Market’ viewed the variety of Sunshine Coast restaurants and the regional produce featured by these restaurants as ‘good’ to ‘very good/excellent’. While 70% of respondents rated the overall reputation of Sunshine Coast restaurants as ‘good’ to ‘very good/excellent’, Sunshine Coast’s dining precincts received the least favourable ratings.
Appendix H: Comparisons across Segments Relating to Regional Food & Restaurant Characteristics

Variety of Restaurants

The following series of graphs will provide detailed information illustrating how respondents from the three market segments (the ‘Young Market’, the ‘Affluent Market’, and the ‘Mature Market’) rated the variety of restaurants in each of the six regions (Brisbane, Sydney, Melbourne, Tasmania, the Gold Coast, and Sunshine Coast).

Figure 113: Comparison Across Segments – perceptions relating to the variety of Brisbane’s restaurants (percentages; n = 459)

Figure 113 illustrates that roughly 60% of respondents from each of the three segments perceived Brisbane to have a ‘good’ or ‘very good/excellent’ variety of restaurants, with the ‘Mature Market’ giving slightly more ‘very good/excellent’ ratings compared to the other two segments.

Figure 114: Comparison Across Segments – perceptions relating to the variety of Sydney’s restaurants (percentages; n = 459)
Figure 114 illustrates that while the vast majority of respondents from the three segments rated the variety of Sydney’s restaurants to be ‘good’ or ‘very good/excellent’, the ‘Affluent Market’ gave more ‘very good/excellent’ ratings compared to the ‘Mature Market’ or ‘Young Market’.

**Figure 115: Comparison Across Segments – perceptions relating to the variety of Melbourne’s restaurants**  
(percentage; n = 459)

![Melbourne Variety Chart]

Figure 115 illustrates that the vast majority of respondents from the three segments perceived the variety of restaurants in Melbourne as ‘good’ or ‘very good/excellent’, with the ‘Affluent Market’ giving slightly more ‘very good/excellent’ ratings compared to the other two market segments.

**Figure 116: Comparison Across Segments – perceptions relating to the variety of Tasmania’s restaurants**  
(percentage; n = 459)

![Tasmania Variety Chart]

As illustrated in Figure 16, The ‘Affluent Market’ and, in particular, the ‘Mature Market’ perceived Tasmania to have a greater variety of restaurants compared to the ‘Young Market’, with the ‘Mature Market’ giving slightly more ‘very good/excellent’ ratings compared to the ‘Affluent Market’.
As illustrated in Figure 117, roughly 60% of respondents from each of the three segments rated the variety of restaurants on the Gold Coast as ‘good’ or ‘very good/excellent’, with the ‘Mature Market’ giving more ‘very good/excellent’ ratings compared to the ‘Affluent Market’ and the ‘Young Market’.

As illustrated in Figure 118, the ‘Affluent Market’ perceived the Sunshine Coast to have a better variety of restaurants compared to the ‘Mature Market’ and the ‘Young Market’, with the ‘Young Market’ reporting the overall lowest ratings.
Dining Precincts

The following series of graphs will provide detailed information illustrating how respondents from the three market segments (the ‘Young Market’, the ‘Affluent Market’, and the ‘Mature Market’) perceived dining precincts in each of the six regions (Brisbane, Sydney, Melbourne, Tasmania, the Gold Coast, and Sunshine Coast).

**Figure 119: Comparison Across Segments – perceptions relating to Brisbane’s dining precincts**

(percentages; n = 459)

As illustrated in Figure 119, the ‘Mature Market’ perceived Brisbane’s dining precincts in a slightly more favourable light compared to the ‘Affluent Market’ and the ‘Young Market’.

**Figure 120: Comparison Across Segments – perceptions relating to Sydney’s dining precincts**

(percentages; n = 459)

Figure 120 illustrates that approximately 90% of respondents from each of the three segments rated Sydney’s dining precincts as ‘good’ or ‘very good/excellent’, with the ‘Affluent Market’ giving slightly more ‘very good/excellent’ ratings compared to the ‘Mature Market’ and ‘Young Market’.
Figure 121: Comparison Across Segments – perceptions relating to Melbourne’s dining precincts (percentages; n = 459)

Figure 121 illustrates that across each of the three segments, roughly 90% of respondents rated Melbourne’s dining precincts as ‘good’ or ‘very good/excellent’, with the ‘Affluent Market’ giving slightly more ‘very good/excellent’ ratings compared to the ‘Young Market’ and ‘Mature Market’.

Figure 122: Comparison Across Segments – perceptions relating to Tasmania’s dining precincts (percentages; n = 459)

As illustrated in Figure 122, Tasmania’s dining precincts received the best ratings from the ‘Mature Market’, followed by the ‘Affluent Market’ and then the ‘Young Market’, with ratings, in general, in the moderate range.
Figure 123: Comparison Across Segments – perceptions relating to the Gold Coast’s dining precincts (percentages; n = 459)

Figure 123 illustrates that the ‘Affluent Market’ and the ‘Mature Market’ perceived Gold Coast dining precincts along very similar lines, with more than 60% of respondents in both groups giving ratings between ‘good’ and very good/excellent’. In contrast, the ‘Young Market’ viewed Gold Coast dining precincts in a slightly less favourable light.

Figure 124: Comparison Across Segments – perceptions relating to the Sunshine Coast’ dining precincts (percentages; n = 459)

As can be seen in Figure 124 the ‘Affluent Market’ perceived Sunshine Coast’s dining precincts in a more favourable light compared to the ‘Mature Market’ and the ‘Young Market’, as indicated by a higher percentage of ‘good’ and ‘very good/excellent’ ratings.
RESTAURANTS AS A CONTRIBUTOR TO A TOURIST DESTINATION’S ATTRACTIVENESS:

Overall Reputation
The following series of graphs provide detailed information illustrating how respondents from the three market segments (the ‘Young Market’, the ‘Affluent Market’, and the ‘Mature Market’) rated the overall reputation of restaurants in each of the six regions (Brisbane, Sydney, Melbourne, Tasmania, the Gold Coast, and Sunshine Coast).

Figure 125: Comparison Across Segments – perceptions relating to the overall reputation of Brisbane’s restaurants (percentages; n = 459)

As illustrated in Figure 125, roughly 70% of respondents from each of the three segments perceived the reputation of Brisbane’s restaurants as ‘good’ or ‘very good/excellent’, with the ‘Mature Market’ giving more ‘very good/excellent’ ratings compared to the other two market segments.

Figure 126: Comparison Across Segments – perceptions relating to the overall reputation of Sydney’s restaurants (percentages; n = 459)

As can be seen from Figure 126, approximately 90% of respondents from each of the three market segments rated the reputation of Sydney’s restaurants as ‘good’ or ‘very good/excellent’, with the ‘Affluent Market’ giving slightly more ‘very good/excellent’ ratings compared to the ‘Mature Market’ and the ‘Young Market’.

Figure 127: Comparison Across Segments – perceptions relating to the overall reputation of Melbourne’s restaurants (percentages; n = 459)

Figure 127 shows that approximately 90% of respondents from each of the three market segments rated the overall reputation of Melbourne’s restaurants as ‘good’ or ‘very good/excellent’. While the ‘Affluent Market’ gave slightly more ‘very good/excellent’ ratings than the ‘Mature Market’, most respondents from the ‘Young Market’ perceived Melbourne’s restaurants as ‘good’.

Figure 128: Comparison Across Segments – perceptions relating to the overall reputation of Tasmania’s restaurants (percentages; n = 459)

Figure 128 illustrates that the majority of respondents from each of the three segments rated the reputation of Tasmania’s restaurants in the ‘moderate’ to ‘good’ range. While the ‘Mature Market’ perceived Tasmanian restaurants in the most favourable light, the ‘Young Market’ gave the least favourable ratings.
As illustrated in Figure 129, the majority of respondents from each of the three segments viewed the reputation of Gold Coast restaurants as ‘good’ or ‘very good/excellent’, with the ‘Mature Market’ giving more ‘very good/excellent’ ratings compared to the ‘Affluent Market’ and, in particular, the ‘Young Market’.

As demonstrated in Figure 130, the ‘Mature Market’ and the ‘Young Market’ perceived the reputation of Sunshine Coast restaurants in a more favourable light compared to the ‘Affluent Market’, as indicated by a higher percentage of ‘good’ to ‘very good/excellent’ ratings.
Regional Produce

The following series of graphs will provide detailed information illustrating how respondents from the three market segments rated the regions’ restaurants in terms of featuring regional produce in their menus.

**Figure 131: Comparison Across Segments – perceptions relating to Brisbane’s restaurants featuring regional produce in their menus (percentages; n = 459)**

As illustrated in Figure 131, across all three dimensions, Brisbane’s restaurants received fairly good ratings for its presentation of local food products. While the ‘Mature Market’ had the most favourable perception of Brisbane’s restaurants, followed by the ‘Affluent Market’, the ‘Young Market’ gave the lowest ratings.

**Figure 132: Comparison Across Segments – perceptions relating to Sydney’s restaurants featuring regional produce in their menus (percentages; n = 459)**

As can be seen in Figure 132, while the majority of respondents belonging to the ‘Affluent Market’ and the ‘Mature Market’ perceived Sydney’s restaurants as ‘good’ or ‘very good/excellent’ in terms of presenting regional produce, the ‘Affluent Market’, overall, reported the highest ratings. In contrast, a considerably smaller percentage of respondents from the ‘Young Market’ viewed Sydney’s restaurants as ‘good’ or very good/excellent’ in terms of featuring local food products.
Figure 133: Comparison Across Segments – perceptions relating to Melbourne’s restaurants featuring regional produce in their menus (percentages; n = 459)

As can be seen in Figure 133, the ‘Affluent Market’ compared to the other two market segments, viewed Melbourne’s restaurants more favourably in terms of offering local food products, with well more than 70% of respondents from this group giving ratings in the ‘good’ to ‘very good/excellent’ range.

Figure 134: Comparison Across Segments – perceptions relating to Tasmania’s restaurants featuring regional produce in their menus (percentages; n = 459)

As can be seen from Figure 134, all three market segments perceived Tasmanian restaurants along very similar lines, with roughly 70% of respondents from each segment giving ratings ranging between ‘good’ and ‘very good/excellent’.
Figure 135: Comparison Across Segments – perceptions relating to Gold Coast restaurants featuring regional produce in their menus (percentages; n = 459)

Figure 135 illustrates that, overall, across the three segments respondents viewed Gold Coast restaurants as quite satisfactory in terms of featuring regional produce in their menus. While the ‘Mature Market’ viewed Gold Coast restaurants most favourably, followed by the ‘Affluent Market’, the ‘Young Market’ gave the lowest ratings.

Figure 136: Comparison Across Segments – perceptions relating to Sunshine Coast’s restaurants featuring regional produce in their menus (percentages; n = 459)

Figure 136 shows that across the three segments, the ‘Young Market’ had the most favourable perception of Sunshine Coast restaurants in terms of presenting local food products, with well more than 60% of respondents from this segment giving ratings in the ‘good’ to ‘very good/excellent’ range. While about 60% of respondents from the ‘Affluent Market’ responded along similar lines, the ‘Mature Market’ gave the overall lowest ratings.
Appendix I: Differences Among Segments in Terms of Regional Perceptions

Table 21: Tukey’s Honestly Significant Difference Test for Comparisons Between Market Segments’ Ratings of the Perception of Restaurant Variety, Dining Precincts, Overall Reputation and Regional Produce of Six Regions (n = 459)

<table>
<thead>
<tr>
<th>Dependent Variable</th>
<th>Segment Type</th>
<th>Segment Type</th>
<th>P-Value</th>
</tr>
</thead>
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<tr>
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</tr>
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<td></td>
<td>Young Market</td>
<td>Mature Market</td>
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<td>Affluent Market</td>
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<td>Sunshine Coast Variety</td>
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<td>Affluent Market</td>
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<td></td>
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* Significant result
## Appendix J: Return to Destinations by Segments

Table 22: Destinations Returned to by the ‘Young Market’

<table>
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<tr>
<th>Destination</th>
<th>Number</th>
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<tr>
<td>Yamba (NSW)</td>
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Table 22 illustrates the number of respondents from the ‘Young Market’ that have returned to the holiday destinations listed.

Table 23: Destinations Returned to by the ‘Affluent Market’

<table>
<thead>
<tr>
<th>Destination</th>
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<td><strong>Byron Bay (NSW)</strong></td>
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<td>Daylesford (VIC)</td>
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### RESTAURANTS AS A CONTRIBUTOR TO A TOURIST DESTINATION’S ATTRACTIVENESS:

<table>
<thead>
<tr>
<th>Destination</th>
<th>Count</th>
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<td>Ellis Springs (Central Australia)</td>
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</tr>
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Table 23 illustrates the destinations the ‘Affluent Market’ has returned to as a result of their positive restaurant experiences.

### Table 24: Destinations Returned to by the ‘Mature Market’

<table>
<thead>
<tr>
<th>Destination</th>
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</table>

Table 24 illustrates the destinations the ‘Mature Market’ has returned to as a result of their positive restaurant experiences.
References


RESTAURANTS AS A CONTRIBUTOR TO A TOURIST DESTINATION’S ATTRACTIVENESS:

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