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RECENT GASTRONOMIC TOURISTIC TENDENCIES BASED ON A NETNOGRAPHY MODEL ANALYSIS

Eduardo Moraes Sarmento

ULHT; CEsA (ISEG - Lisbon School of Business of Economics & Management, University of Lisbon); ESHTE

Sandra Maria Correia Loureiro

Instituto Universitário de Lisboa (ISCTE-IUL); Business Research Unit (BRU/UNIDE)

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Abstract

As a result of tourism consolidation, gastronomy appears as the main key to success. Under this context, products, and services provided by this activity must adapt to the new consumers, the new tendencies, and behaviors. Tourists like regular consumers look for products or experiences that may be adaptable to their motivations and expectations. Therefore, it is not strange that restaurants need to provide new products while keeping their own characteristics. On the other hand, we live in a global world where the internet and the various social media platforms play a crucial role. Under these new constraints, restaurants have to readapt themselves to this new trend if they want to succeed. This study aims to understand two main aspects: (i) why and how are restaurants and food distributors adapting to the new needs of the market? (ii) what is the impact of Web 2.0 in gastronomy? In order to fully answer these questions, authors have analyzed the 2015 and 2016 tendencies for the foodservice using a netnography analysis model. Findings help destination and restaurants managers to adapt and change their products and services taking into account this new reality.

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Keywords

Foodservice Tendencies, Lifestyle, Social Media, Consumer Motivation.

Resumo

Como resultado da consolidação de turismo, a gastronomia aparece como uma chave principal para o sucesso. Nesse contexto, os produtos e serviços fornecidos por esta actividade têm de se adaptar aos novos consumidores, às novas tendências e comportamentos. Os turistas, tal como os consumidores, procuram produtos ou experiências que podem ser adaptáveis às suas motivações e expectativas. Portanto, não é estranho que os restaurantes precisem de fornecer novos produtos, mantendo as suas características próprias. Por outro lado, vivemos num mundo global, onde a internet e as várias plataformas de média social desempenham um papel crucial. Sob estas novas restrições, os restaurantes têm de se readaptar a esta nova tendência, se quiserem ter sucesso. Este estudo tem como objetivo compreender dois aspectos principais: (i) por que e como estão os restaurantes e distribuidores de alimentos a adaptar-se às novas necessidades do mercado? (ii) qual é o impacto da Web 2.0 na gastronomia? A fim de responder plenamente a estas questões, os autores analisaram as tendências para os setores de alimentação em 2015 e 2016 utilizando um modelo de análise baseado na netnografia. Os resultados obtidos ajudam os gestores dos destinos e dos restaurantes a melhor se daptarem a mudarem os seus produtos e serviços tendo em conta esta nova realidade.

Palavras-Chave

Tendências na Alimentação, Estilo de Vida, Social Media, Motivações de Consumidores.

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Introduction

Nowadays tourism is considered as one of the fastest growing economic activities worldwide. In fact, despite all the international constraints, total global Travel & Tourism GDP is expected to keep growing at higher rates than the global economy. Tourism also accounts for 9% of the GDP on a global level, while 1 in 11 jobs globally are in tourism (UNWTO, 2016). Under this context and since tourism is a highly labour-intensive economic activity, the level and quality of services provided is of huge importance.

Due to the complexity of tourism as an economic activity associated with the gastronomy experience, the approach towards tourism gastronomy needs to be analyzed in order to yield the best possible outcomes. Thus, the major aim of this study is to analyze the foodservice tendencies for 2015 and 2016. Secondly, we performed an analysis of the impact of the lifestyle changes of the society and the social media on such tendencies. Finally, we conducted an examination of consumers' motivations in the foodservice market. Methodologically, this study is based on a netnographic analysis of online forums dedicated to this issue.

Literature Review

Today's tourist modern world can be characterized by the available information, new technologies as well as the numerous innovations that make it easier to perform daily work faster and better. In this modern and global market, it is difficult for restaurants to achieve and keep a competitive advantage (Knezevic, 2016).

Currently, with the tourism market growth, the importance of Internet information has been recognized. The fast spread of the Internet and its use by different players imposes gastronomic businesses as well as destinations to adapt to new rules and new challenges to avoid the risk of disappearing from the market (Kim, 2016). The Internet has changed the tourist economic environment in which companies operate since businesses are conducted in real time (Knezevic, 2016), and a great number of consumers became more aware of the ethical concerns. This allows the creation of new consumption communities that are more innovative, creative and collaborative through the spread of technologies that foment networking (Loureiro, Pires & Cayola, 2014).

If they want to remain competitive and ready to face these new challenges and changes in the tourist market, companies need to show strong agility in offering new products, determining the appropriate production mix and in determining business processes that are defined by customer needs (Knezevic, 2016).

The immense number of web businesses means that the internet (electronic) market will keep growing and will raise the competitiveness of companies that use the internet and the web to conduct their business. This means that it is crucial for companies to harmonize their own internal information systems in order to have success when communicating with their clients (Lee, 2010).

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On the one hand, information provided on the accommodation and destination will positively influence the perceived usefulness. On the other hand, both the interactivity and navigability will have a positive effect on the perceived ease of use of the Websites (Herrero & San Martín, 2012).

This is an important issue because if natural beauties, as well as an advantageous geographical position, may create a desirable destination, however, what visitors bring home is an emotion as a result of their visit, and this is related to standard services, diversity of offer and possible deviation from what is expected to what is received.

In other words, as we saw before, trends in tourism have changed considerably.

Due to the development of technologies and various gadgets, nowadays a tourist only needs a few clicks to receive enough information to be instantaneously up to date with information from all corners of the world (Jelec, 2016).

As a result of this, the traditional sun and sea are no longer sufficient to attract and keep a significant number of tourists. Tourism no longer occurs by inertia. The offer and content must be advanced, and the entire product packaged changed in order to accomplish this trends. It is necessary to find the specific features and attractions that make a certain destination different as it happens with gastronomy (Jelec, 2016).

Most researchers of the foodservice fied have an observational approach because (i) individuals tend to post reviews regarding foodservice to enlighten others; (ii) publicly accessible sites do not require individual consent and (iii) participants react in a characteristic online uninhibited manner, when unaware of the research (Mkono & Markwell, 2014).

It is thus important to present restaurant behaviors in 2015 and in 2016 stressing out that these results are a direct consequence of previous years (Sonnenshein, 2015). First, it is important to stress that Generations Y and Z are shaping this sector (Taylor, 2014a). In 2015, we can stress the following tendencies as being the most important: (i) Importance of food design for social media. Restaurants have realized the importance and power that customers have on social media as Instagram and Twitter are revolutionizing word-of-mouth and proving to be a make-or-break platform. Consequently, chefs are taking extra care in the presentation of their dishes, in order to satisfy the Instagram-hungry generation (Shaw, 2015); (ii) The increasing concerns about health and obesity have influenced the smaller portions and plate sizes. Additionally, dining rooms are getting smaller and more efficient in order to reduce energy usage, cut costs, encourage intimacy and reduce staff (in some cases personnel is actually being replaced with new technology) (Sonnenshein, 2015); (iii) Rise of the bitter flavors; (iv) Remodeling of the traditional foodservice market. Not only is the sit-down market shrinking, but also is losing its market share to alternative forms of foodservice. Fast casual restaurants are progressively captivating more clients who prefer to spend their money at slightly higher quality chain (Sonnenshein, 2015); (v) Importance of beverages as a key way to generate revenue, attract loyal customers and differentiate operations from those of their competitors; (vi) Peasant dishes, ethnic street foods and foods from the former Soviet Union's Asian satellite countries are becoming more and more popular (Taylor, 2014b); (vii) Confronted with healthier menus, nutritional labeling and food-transparency, restaurants are faced with an escalating

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number of requests for customized meals for diabetics, vegetarians and people on gluten-free, dairy-free and other special diets; (viii) Local sourcing and in-house processing are still on growing and gaining ground in the battle for diner's hearts and minds (Sonnenshein, 2015). The love for local food is increasing, and that is hurting most chain restaurants, who struggle to convince their clients that the products used are sustainable and environmentally friendly (Taylor, 2014c); (ix) Restaurants are becoming more socially responsible as tourists care about the origin of their food, how it is grown, how employees are treated by suppliers and animal rights (Taylor, 2014d); (x) Engagement of generation Z and technology changes in the hospitality industry. Restaurants have been focusing in grabbing the attention of Millenials (Taylor, 2014e) through social media. However, they have to start appealing to Generation Z (those born between 1995 and 2012) (Taylor, 2014a); (xi) Although snacking is rising among all ages and genders, snacking among consumers over the age of 65 contributes to additional years with a higher quality of life (Zizza, 2014); (xii) Online grocery shopping and delivery is becoming more and more used by consumers (conagrafoods, 2015). Google, for example, expanded its Express delivery service (Rosenheim, 2014), which offers same-day delivery from stores like Costco, Whole Foods and Target, to Boston, Chicago and Washington, DC. Amazon expanded Amazon Fresh (Kastrenakes, 2014) to New York. Additionally, it launched a partnership with the USPS (Rosenheim, 2014) to deliver groceries in San Francisco and AgLocal (Jones, 2014) to offer on-demand sustainable meat in the city.

The startup Instacar is booming, as it can be seen by its 15-20% weekly growth during 2014 (Meijers, 2014b); (xiii) The demand for smoked food has risen as chefs keep applying smoking and grilling to add some sizzle and impart new flavor to other proteins and alternatives like vegetables, butter, and even beverages (conagrafoods, 2015); (xiv) Popularity rise of fermented foods since this kind of food contains live cultures, or is preserved in liquid in order for their sugars and starches to become bacteria-boosting agents (conagrafoods, 2015); (xv) 2015 was the year where foodservice focuses on Generation Z. This generation brings an entirely new set of food values to the kitchen table (conagrafoods, 2015); (xvi) In-house usage of craft foods (associated with foods made in small batches with specialized, local ingredients). Nevertheless, major companies are finding ways of producing them in larger quantities (conagrafoods, 2015; (xvii) Nutritional analysis with apps. Consumers are becoming more worried about their health. Thus, they demand more information about their foods. The appearance of innovative devices like Prep Pad is helping consumers in learning the aforementioned data instantaneously. This device pairs with an iPad app to calculate the exact nutritional content of meals, including the carbs, fats, protein and calories by just scanning the barcode of food packages used as ingredients or the items on a plate (conagrafoods, 2015). Technology has been facilitating the transparency for shoppers for a long time now, and the startups in this space are getting more and more sophisticated (Meijers, 2014a). Numerous apps, such as Fooducate, ScanAvert and ShopWell (Meijers, 2013) help demystify food labels and enable people to make better, and healthier food choices; (xviii) Supermarkets are positioning themselves as direct competitors with chain and local restaurants. Experienced chefs offer unique dishes,

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local foods, and drinks. Consumers go to supermarkets not only to acquire food but also to attend cooking classes and special events (conagrafoods, 2015).

In 2016, the main tendencies are (i) Delivery in the restaurant industry as a result of the big disruption of food retailing and food service in 2015 and 2016 due to the tech-driven delivery. The main driver of this revolution is the smartphone (Whiteman, 2016). However, this innovation can be seen as a danger to the restaurant business because they may lose the marketing control of their own businesses (Whiteman, 2016); (ii) "Healthification" of Fast and Fast-Casual Food. Restaurants are being obliged to label GMO's on their menus (Tristano, 2015). Customers no longer believe in the pictures of cows and leaves of grass on the cardboards as a sign of health and wholesomeness since they try to find more holistic initiatives from restaurants, such as waste control, water conservation, humane treatment of both animals and employee, and other eco-social issues; (iii) Pasta as an Endangered Species. In the last five years, pasta sales has decreased 8% in Australia, 13% in Europe (with Italy having a 25% drop) and 6% in America (Whiteman, 2016) since this ingredient has been substituted by quinoa, chickpeas, and lentils, among others. Additionally, spiralizers are allowing people to experiment with vegetable ribbons, like zucchini, asparagus, and sweet potatoes, replacing pasta completely; (iv) Vegetables as the main ingredient; (v) The movement against tipping. It is believed that the growth of the restaurant industry for the past fifty years has been sustained by artificially low prices, possible through underpaid labor (Whiteman, 2016); (vi) The poke trend. Poke is a Hawaiian mainstay (bowl of chopped or cubed raw fish, mainly ahi tuna, over seaweed-seasoned rice) that has been becoming more and more famous. Restaurants specialised in this dish are growing strong and adapting the recipe to other kinds of fish, like scallops, salmon, and octopus (Whiteman, 2016); (vii) Modernization of traditional cuisine; (viii) The rise of acai bowls (smoothie made with frozen pulp from this Brazilian fruit, milk, various other fruits, ice, and toppings, like chocolate, chia seeds, granola, or peanut butter); (ix) Fried chicken's sandwiches are coming back; (x) Aromatic heat. Food consumers realize that spicy food is not enough. There has been an interesting shift in favor of flavors to create an aromatic spice blend as a result of the refugees from Syria. The Arabic, Christian, and Jewish influences can be easily spotted, creating a warm, rather than hot, mixture; (xi) Retailers have been luring shoppers into their stores with snacks and meals. The idea is that the longer a customer is on the premises, the more he will buy per hour of stay; (xii) The fast-pacing world of today is taking a toll in the alimentary habits of consumers. People use to have three meals per day, but they are now switching them for snacks, completely obliterating meals. This trend is actually affecting everyone. In the US, snacking increased 47% from 2010 to 2014 (Whiteman, 2016). The main reason behind this is the change in snack flavor profiles, from sweet to savory and from high-carb to nutrient dense high-protein snacks; (xiii) Although the on-growing popularity of the Thai hot sauce is strong, Technomic predicts that chefs and chain restaurant executives will keep looking for the next big hot ethnic flavor.

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Methodology

This study is based on a netnography methodology, which is a specialized form of ethnographic research developed in 1995. It adopts a participant-observational approach and takes online interactions as it fieldwork (Kozinets, 2010). Kozinets' method emphasizes online communities and cultures thus clearly separating both offline and online realms (Kozinets, 2012).

In the current study, we start with an automated search in order to collect information on gastronomic and foodservice tendencies and the impact of lifestyle changes and social media. Additionally, there is a criterion of the only choice the inclusion of articles that referenced the years 2015 and 2016. These terms and conditions are used due to their relation with the topic studied and because they would reduce the possibility of missing relevant information to the study. Furthermore, the selection process for the information used included certain steps, such as: (i) a broad screen of the titles of the articles presented from the search and the extraction of those who were irrelevant to this study; (ii) an analysis of the websites or blogs of such articles accordingly to relevancy with the theme of this project; (iii) an analysis of the information of the articles that passed the previous stages and the selection of the most appropriate and relevant ones to the research topic, supported by a netnographic research.

In terms of timeframe, as the goal of this research is to be the most contemporary possible relatively to tendencies on the gastronomic and foodservice area, we focus on 2015 and 2016. This preference is due to certain aspects, like the implementation of the social media in this area and the renovations that it being to the service during this timeframe and the changes of mind set that consumers experienced. Consequently, only information that refers to the years of 2015 and 2016 are selected.

As it was previously mentioned, to create a netnographic analysis, it is necessary to follow certain steps. This study follows these different stages, in order to justify its findings: (i) Research Planning: in order to fully answer the research questions, it is planned to analyze public forums that delve into the subjects studied. Therefore, restaurant reviews websites, public blogs, and app websites were taken into consideration to understand the consumers' needs and wants. It is important to understand that, as it is advised in the previous section about the methodology and foodservice, it was decided to take an observational approach; (ii) Entrée: as it is originally planned, websites specialised in restaurant opinions (i.e. Zomato and Yelp), public blogs and app websites (i.e. Google Play and iTunes) were screened, in order to find consumers' reviews on the found foodservice trends. No participation with the online members is taken, in order to not disrupt them. It is believed that a direct participation could change the natural flow of conversation (iii) Data Collection and Interpretation: a netnographic table is created in order to hold the most relevant reviews found. Then, we analyze the consumers' perspective, those reviews and comments are interpreted and related to the foodservice trends of the years 2015 and 2016 and to the consumption motivations that members had when partaking in their activities; (iv) Ensuring Ethical Standards: there is a serious concern in not disrespecting the privacy of

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online members. All information used is public and referenced; (v) Research Representation: after properly interpreted, the findings from netnography are compared to the findings relatively to foodservice trends in the data analysis section.

Data Analysis

Gastronomic Trends and Netnographic Analysis

During the research process, 30 different tendencies are found for the timeframe analyzed. Additionally, 32 different comments are examined in the present study. Both, comments and trends are compared, which lead to the following group of major trends:

(i) Health

Most of the consumers have a big concern with health and dietary concerns incentivising smaller quantities of food; (ii) the restaurants disposition is now being substituted by smaller spaces, in order to decrease costs; (iii) consumers strongly appreciate restaurant and food markets with custom dining options for health; (iv) the preoccupation with health affects not only the older generations, but also the Generation Z.

We can say that there is an "healthification" of the consumer needs that is affecting restaurants. Hence it is not strange that they are consequently trying to reduce the usage of ingredients that are heavily loaded with carbs or hurt the environment and substituting them with vegetables. It is important to stress that, pasta has becoming less and less consumed, for example, and vegetables have been stepping up as the main component, putting meat completely aside.

As a consequence of this new health-concerned lifestyle, a great number of new trends appeared such as Acai Bowls or the rise of Poke, which were incredibly appreciated by consumers. The snack industry has been rising and adapting to constantly moving society that requests healthy food.

This request for health also affected social media and technology as there has been a rise of nutritional analysis with apps. Consumers have been downloading mobile applications, in order to understand what they are eating, both at home and in restaurants.

Consumers are looking for better eating habits, as well as flavourful food. Consumers have been trying numerous spices, such as turmeric, due to their health benefits and to the intriguing flavors. The biggest trend is the Asian influence because consumers have been wildly looking for different traditional cuisines that were modernized to include Asian ingredients or spices from common dishes. Consumers are willing to experiment new things, like smoked foods and craft foods, at their own home as well.

(ii) Social media

We find that the various platforms have strongly affected the foodservice market since most restaurants and retailers had to adapt to Web 2.0 in different ways: (i) they had to be quick in answering to the customers' needs as a result of the growth of online grocery shopping with same-day delivery; (ii) restaurants have been improving their

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food design to satisfy the needs of social media platforms, like Instagram, since it represents free, but difficult to control, marketing. On the other hand, consumers publish their meal photos, and restaurants took responsibility in fighting lightning problems or bad filtering; (iii) restaurants have been providing new technologic marketing strategies to engage the new generations. Some of the strategies being used are louder music in restaurants, moving visuals, heightened experiences and high-tech service; (iv) the foodservice market had to change other components. In order, to accommodate this socially responsible society, restaurants had to take social responsibility and accountability for their procedures. One measure that is being taken by some restaurants is the no-tipping policy. Restaurants are increasing their prices, in order to increase staff wages; (v) finally the traditional foodservice market has been suffering an improvement. Inclusively, retailers are stepping into the foodservice. This represents a way of satisfying the needs of a generation that is constantly moving and of bringing customers into other areas of consumption, while satisfying their need to eat.

(iii) Green Consumers and Ethical Motivations

Taken into account the 32 comments collected, 8 fell into the category of Green Consumers and Ethical Motivations. Green Consumers refuse to acquire products that are environmentally undesirable. There is a true quest to buy healthy food that is friendly towards the environment.

In spite of this motivation, 8 out of 32 consumers still choose their consumptions habits in accordance to their Personal Motivations. They decide on what they buy based on the spontaneous personal benefit they may achieve through alternative consumption experiences.

Another important issue is related to the Hip Consumerism (consumers who choose to go against typical trends and consumption motivation, in order to rebel against them, and seek the new and best tendency). On the other hand, we find the Self-identification motivations that happen when consumers adapt their behaviors in line with their beliefs and their peers. The search for vegan food and the necessity to identify oneself as vegan is an example of such motivations (Loureiro, Pires & Cayola, 2014) (See Figure 1).

Research Conclusions

In order to find the main tendencies on the gastronomic market in 2015 and 2016, we structure three main categories in this study. There has been a growing concern with health in these last years. Tourists as regular consumers are concerning with obesity issues and therefore are adopting new diet plans and are fighting foods with unnatural components. As a consequence, the vegan movement got strength. Several restaurants started using vegetables as their main ingredient and progressively replaced meat or pasta dishes. They also began reducing their food portions and started to offer healthier dining options or health-concerned snacks to satisfy consumers who have stressful lives but still want to adopt a healthy alimentation for example.

Social Media has changed this market. Consequently, restaurants and food retailers in order to survive need to adapt food design in order to fight the backlash that restaurants may get from bad photos that may be posted in social media platforms, like

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Instagram or Facebook. They also adopted marketing strategies in order to capture younger generations through loud music, bigger presence on social media and providing the menu by e-mail.

Finally, generation Z's attitude towards gastronomy is shaping this industry. For example, they often use the informational mobile apps with recipe-sharing and nutritional analysis.

There is an on-growing growth of this type of cuisine that demands not only a modernization of the traditional gastronomy but also an adaptation of the typical meals and Asian ingredients or flavors into other cultures.

On the other side, consumers have changed their preferences of spices, preferring heat with flavor. This evidences the impact that Sriracha had in these years.

Finally, restaurants and retailers have been providing meals and ingredients with the traditional smoked flavor, where it was least expected. This last major trend is due to the Social Responsibility and Environmental Sustainability that both consumers and retailers are diving into. Mostly because of health concerns, but a great number of food consumers are decreasing their consumption of meat due to the negative effects it has on the environment and on the animals. Additionally, they are more attentive to organic and to brands and companies who are eco-responsible.

As a reply to this, restaurants have been using local and fresh foods that are rid of GMO's and artificial flavors and colors, increasing their vegan menus, and using smaller spaces of business, in order to use less energy and to pollute less. However, restaurants also take into account their responsibility with society. Thus measures have been taken to support their peers. One great example is the adoption of no-tipping policies in restaurants and the increase in the minimum wage.

In what concerns the main consumption motivations for consumers in 2015 and 2016, we can conclude that they are: green and ethical, personal, alternative, hip consumerism, and self-identification.

Consumers have increased their concern with their own health and with the environment. Thus a lot of their decisions were based on eco-friendly consumption. There was a rise of vegetable usage, the support of environmentally friendly brands, and the adoption of consumption habits that increased their health. Yet, a great number of people still had personal motivations. Their consumption habits were based on personal preferences and instant satisfaction. Along with this were the alternative motivations. Consumers would also adapt their habits in preference of certain products against others, like cooking at home instead of going out for dinner.
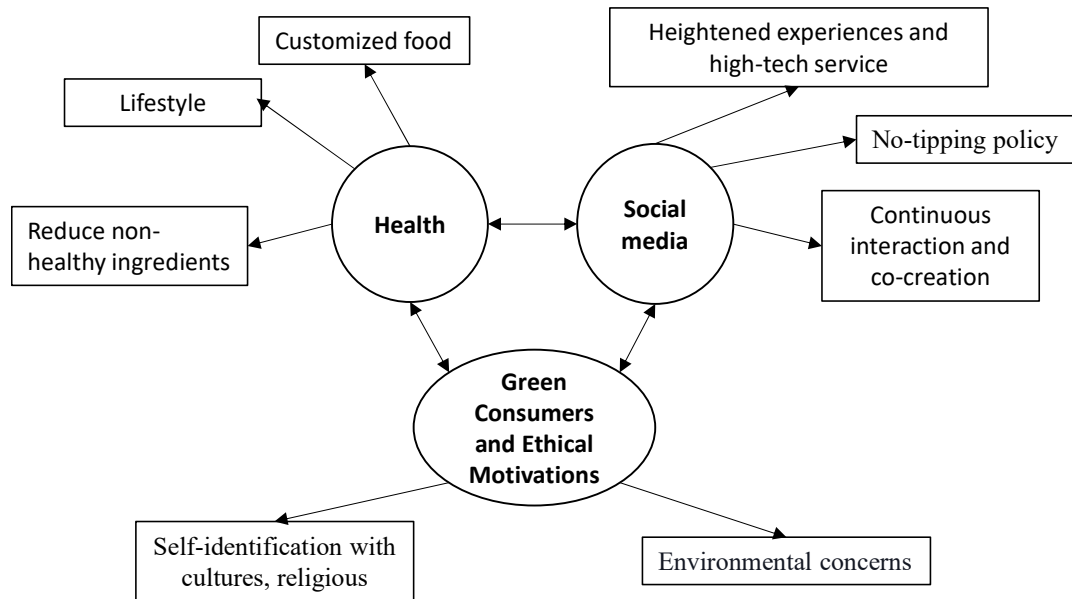
Another kind of motivation was the Hip Consumerism, that shown that consumers would go against typical trends almost as defiance against standards. This led to the rise of vegan restaurants, for example. Self-identification motivations of consumers who wanted to go in accordance with their own beliefs and of their peers were strong.

Finally, consumers who would just look for happiness through consumption were not out of place. There are still a number of people who just want to buy food and go to restaurants just because it makes them feel satisfied and pleased.

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Figure 1. Framework: new trends in foodservice

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