

Food Tourism, an exploratory study in the Portuguese context

Turismo Alimentar, um estudo exploratório no contexto português

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Abstract | Gastronomy and Wines has been a premium food tourism product of the national destination management organization (Tourism of Portugal) since its first National Strategic Plan for Tourism approved by the Portuguese Government through the Resolution of the Council of Ministers no. 53/2007, of 4th of April, to the present one with growing visibility and food awards. However, international research points out the emergent need to have in-depth knowledge of this industry, namely on the numerous given denominations and its potential segmentations on the food tourist demand. The main objective of this study is to clarify the nomination for this tourism sector in Portugal and to identify potential food tourism demand segmentations, paired up with the restaurant industry. To this, and due to the present pandemics, an innovative exploratory methodology was created for a food expert focus group, adapted to an online format, using visual stimuli and a computer-assisted qualitative data analysis software. The findings show that, although there was not a general agreeance in the renaming of the tourist food related activities, there was a consensus in the proposed four restaurant typologies and its hypothetical tourist demand segmentation, as presented on intermediate results section. Also, emerged the need for future research on the main food tourism demand markets in Portugal, thus being presented in the last section of this study a structured proposal for the coming research.

Keywords | Food tourism in Portugal, food tourism demand, food tourism market segmentation, tourism restaurant industry, gastronomy tourism

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Resumo | Gastronomia e Vinhos tem sido um produto premium da entidade nacional de gestão do destino turístico Portugal (Turismo de Portugal), desde o primeiro Plano Estratégico Nacional para o Turismo, aprovado pelo Governo através da Resolução do Conselho de Ministros n.º 53/2007, de 4 de Abril, até à atualidade, com crescente visibilidade e prémios na área alimentar. Não obstante, a investigação internacional aponta para a necessidade emergente de um conhecimento especializado desta indústria, nomeadamente das suas variadas denominações e potenciais segmentos de procura turística alimentar. O objetivo principal deste estudo consiste em clarificar a nomeação atribuída a este setor turístico em Portugal, e identificar potenciais segmentos na sua respetiva procura turística, emparelhados com a restauração. Desta forma, e devido à atual situação de pandemia, foi criada uma metodologia exploratória inovadora para um grupo focal de especialistas da área alimentar, adaptada a um formato online, recorrendo a estímulos visuais, e ao processamento da análise qualitativa de dados através de um software especializado. Os resultados demonstram que, apesar de não haver consenso relativamente à renomeação das atividades turísticas relacionadas com a alimentação, houve uma aprovação no que concerne às quatro tipologias de restauração propostas, bem como os seus hipotéticos segmentos de procura turística, como apresentado na secção de resultados intermédios. Comprovou-se igualmente a necessidade de dar continuidade a esta análise sobre os principais mercados de procura turística alimentar em Portugal, sendo assim apresentada uma proposta de investigação na última secção, a desenvolver no futuro.

Palavra-chave | Turismo alimentar em Portugal, procura turística alimentar, segmentação no mercado turístico alimentar, restauração no turismo, turismo gastronómico

1. Introduction

In 2019, tourism was one of the main developing industries, according to Jamal and Budke (2020), representing the corollary of the 10th consecutive year of growth, with 1.5 billion tourist arrivals (UNWTO, 2020). Focusing on the food tourism market, the Second Global Report on Food Gastronomy, by the United Nations World Tourism Organization, underlined three main reasons for visiting a Tourism Destination (TD), listed by order of importance: culture, nature and gastronomy (UNWTO, 2017). This same report highlights the importance of wines and well referenced TD's cuisine, focusing on national and regional gastronomic heritage, as key global economic development. Also, de Jong and Varley (2017) analysed the image perception of the deep-fried *Mars* chocolate bar, and its impact as a food tou-

rism product in Scotland. Their main findings were that Scotland's official tourism strategy (storytelling on Scottish healthy and premium food ways and products), was undermining growth and obstructing touristic demand for this internationally recognised street food product, because it was not paired up with this Destination Management Organization (DMO) strategy. Thus, culinary practices not aligned with official tourism promotion discourses can generate great benefits, revealing different cultural and economic dimensions in food tourism market.

In addition, several authors have been pointing out the urgent need to properly know this tourism sector, starting by differentiating several given denominations, like food, culinary, gastronomy or gourmet tourism which, according to them, can actually represent different food tourism segments (Araújo, 2021; Ellis et al., 2018; Liberato et al.,

2020; Okumus et al., 2018; Özdemir & Seyitoğlu, 2017; Privitera et al., 2018; Robinson et al., 2018). Several authors have concluded that food related businesses to the commonly named gastronomy tourism, through restaurant industry, are privileged socioeconomical consumption places (Everett, 2019; Higgins-Desbiolles & Wijesinghe, 2019; Liberato et al., 2021; Özdemir & Seyitoğlu, 2017; Robinson et al., 2018), and prosperous touristic storytelling sites (Ellis et al., 2018; Everett, 2019; Gyimóthy, 2017; Liberato et al., 2020; Polat & Aktaş-Polat, 2020).

Consequently, current official food tourism products do not reflect the growing segmentation within food tourism demand, making it difficult to implement tailored-made marketing strategies and to optimize economic recovery for this sector. This occurs, partially, because the restaurant industry itself is fragmented, as Rachão et al. (2019a) believe, concerning the Portuguese context.

According to Henriques and Custódio (2010), France, Italy, Spain and the Netherlands classified Portugal in 2006 as the third best gastronomic destination, thus meaning that tourism and gastronomy were, at the time, becoming sources of sustainable economic development for this TD. These authors studied the importance of food heritage in Algarve's restaurant industry, then associated to the by-product Gastronomy and Wines, bearing in mind that tourists would spend, on average, 25% of their budget on food. Also, concluded that tourists visiting that TD, would want to have served on their plate regional authenticity, but with a high degree of familiarity to their destination's foodways.

The main objective of the present research is to analyse the food tourism market in Portugal, nowadays, and define potential emergent segments related to restaurant typologies. The following section will present a state of the art on the main official food tourism strategies in Portugal. The subsequent sections three and four will concentrate on the qualitative methodology applied to this in-

vestigation, through a focus group (FG) supported by a computer-assisted qualitative data analysis software (CAQDAS). The section five will focus on main conclusions, presenting a future research, studying three main tourist demand markets in Portugal.

2. Literature Review

2.1. Touristic food consumption in Portugal: Gastronomy and Wines Product

The correlation between food and tourism in Portugal can be made through cultural activation, connecting both constructs to local/national heritage (Rachão et al., 2019), or through creative industries, resulting into innovative food touristic products, as also mentioned by Cunha et al. (2019).

Outlining an analysis of the official communication strategies of the national DMO Tourism of Portugal, it can be observed through its National Strategic Plans for Tourism (PENT), that Gastronomy and Wines product was proposed as a guideline for the food market promotion facing the 2015 horizon. It was then considered a cultural complement to the tourism experience, as well a primary motivation to visit Portugal, in some regions (Turismo de Portugal, 2011).

In the 2013 revised PENT (Turismo de Portugal, 2013), Gastronomy and Wines was presented as a niche market product, with an estimated growth of 8% to 10%, for the then next years. This product received the following competitiveness factors: heritage classifications, exclusive products, brands and product qualifications, sweet pastry from ancient monasteries, quality of fish and seafood, increasing qualification of chefs and their internationalization.

Finally, for the 2027 roadmap, Gastronomy and Wines is presented as a qualifying asset of TD

Portugal, focusing on Michelin-starred chefs and wine tourism-endorsed awards (Turismo de Portugal, 2017). This national tourism strategy has the power of stimulating the local economies and promoting the regional food heritage.

In fact, Cunha et al. (2019) recognized the growth of gastronomy tourism as a main strategic product in Portugal, acknowledging the importance that the 2027 Tourism National Strategy (ET2027) horizon gave to Gastronomy and Wines. As the same concluded, gastronomy is assumed as a stimulus to the development for local economy and has been progressively recognized as an autonomous product and a main strategy of tourism promotion. Also, the Michelin stars awards are presently known in Portugal as being a differentiating attribute, of international recognition and projection.

Under similar conditions, Rachão et al. (2019b) through a research on three wine regions of northern Portugal (Douro, Minho and Trás-os-Montes), concluded via local interviewed stakeholders that gastronomy is the strongest asset to premium wine promotion, being Gastronomy and Wines identified as the main image of Portuguese touristic strategies.

In the Portuguese context, gastronomy tourists are defined as those who want to enjoy local food traditions, namely typical products, as well as acquire more in-depth knowledge about the wines of a specific region, also to be able to taste something done by a recognized chef, or even experience being with him. These factors are a strong motivation for tourists travelling to a TD with specific food attributes, looking for exclusive experiences and unique products (Cunha et al., 2019).

The report on Food Tourism in Algarve recognized that this region, receiving European's Leading Beach Destination Awards in 2012, 2013, 2015, 2016 and 2017, uses its gastronomic heritage as one of the main touristic assets, paired up with the PENTs and ET2027 integrated strategy on food tourism (Almeida et al., 2018).

Regarding the Portuguese gastronomic image, Cunha et al. (2019), concluded that the main recognized attributes were: a safe environment, reasonable prices for attractions and activities, a quiet and restful atmosphere, and friendly and helpful local people. The products used in food preparation and plating are the most important attributes, followed by the identity of Portuguese gastronomy, and the will to try typical and regional food. The most mentioned products were cod, wine, olive oil, fish, *pastéis de Belém*, seafood, Port wine, sweets, sardines, cheese, among others (Barroco & Amaro, 2020; Cunha et al., 2019).

In 2020, 157 Portuguese restaurants received a distinction by the famous Michelin Guide, from 'Michelin dish' (91 restaurants), 'Bib Gourmand' (38), to one star (21) and two stars restaurants (7) (Michelin Guide, 2020), underlining the strong strategy, which Tourism of Portugal national DMO has been developing since the first decade of the 20th century, as previously analysed.

Finally, considering Almeida et al. (2018) food report in Algarve, we add that the World Travel Awards created in 2020 the first annual World Culinary Awards, and Vila Joya Restaurant (in Algarve) won the category of Europe's Best Restaurant Hotel (World Culinary Awards, 2020).

2.2. Food tourism in Portugal: the need for in-depth analyses

Although the last published Portuguese Tourism Satellite Account showed that 46% of the gross added value generated by tourism (VABGT) share for 2016 came from Restaurant industry and Beverages (TravelBI, 2017), there is still no official data for this economic sector, either by types of establishments or by economic performances per region. Madaleno et al. (2018) identified this problem when applying an inquiry on food-related behaviours to international tourists in Portugal, thus revealing the need for specialized data, regar-

ding the economic reality of these food establishments.

In addition, the last version of the Portuguese Classification for Economic Activities (Instituto Nacional de Estatística, 2007) indicates the following restaurant typologies for sitting customers: restaurants within the hotel industry, traditional restaurants, restaurants with counter sits, restaurants without table service, typical restaurants, restaurants within dancing places, beverage establishments, cafes, bars, pastry shops and tea houses.

It should be mentioned that food and tourism related in-depth studies only now are starting to emerge in the Portuguese context, placing this country as a food TD subject. And it should also be underlined that most of these studies name food related touristic activities as gastronomy tourism. It is important to notice that “Different countries use distinct terms to relate food to tourism. Concepts such as culinary tourism, food tourism and gastronomy tourism are used interchangeably” (Rachão et al., 2019, p. 33). Nevertheless, it must be noted that Portuguese academia and national tourism DMO consensually use the term ‘Gastronomy Tourism’, commonly paired up with the Gastronomy and Wines touristic product.

However, the international literature review has shown, as previously highlighted, that food tourists are not an homogenous group, and there is a growing need, partially due to tailored-made marketing strategies, to “(...) pay greater attention to nuances in motivational and behavioural preferences in homogeneously treated travel markets”, such as food tourism consumption (Robinson et al., 2018, p. 367).

To this point, it must be referred that in the Portuguese context, Almeida et al. (2018) already proposed a segmentation between culinary tourists and gastronomy tourists, as Liberato et al. (2020), but with opposite definitions.

Based in the 2016 report of the World Food Travel Association, Almeida et al. (2018) listed 13 psycho-culinary profiles, them being: Adventurer, Ambience, Authentic, Budget, Eclectic, Gourmet, Innovative, Localist, Novice, Organic, Social, Trendy and Vegetarian. To the present research, two key aspects can be drawn:

- (i) Each tourist reveals, when searching for places of food consumption during a TD’s, changes between three of the designated 13 profiles;
- (ii) Four of those profiles are segmented according to specific restaurant typologies: the desire to experience Michelin stars and luxury restaurants; the preference for informal and everyday food and low budget restaurants; the search for vegetarian restaurants for tourists with corresponding food preferences; interest in attending places that cook local and regional food, representative of the TD’s food identity.

Concerning the balanced growth of this tourism sector alongside with the restaurant industry, especially during the present COVID-19 pandemics context (World Health Organization, 2020), sustainable strategies should be used to optimize global needs, according to Higgins-Desbiolles & Wijesinghe (2019).

On the other hand, Jamal and Budke (2020), Romagosa (2020) and Sigala (2020), during this current pandemics situation, focus on the use creative and innovative solutions for this market, stepping down to the local scale, getting to know in detail local food establishments, local products and local producers, adjust pricing to local purchasing power and corresponding touristic segment needs.

3. Methodology

3.1. Collaborative methodology: qualitative research and focus groups

The methodology adopted was previously assumed by other authors, who have been conducting studies in food tourism's area, using the qualitative methodology, partially or totally, in their knowledge construction processes (Ji et al., 2016; Natário et al., 2019; Privitera et al., 2018; Rachão, 2020; Sarmiento & El Hanandeh, 2018; Sousa, 2018; Tsai & Wang, 2017).

It should be noticed that the COVID-19 pandemic situation, decreed on 12 March 2020 by the WHO (World Health Organization, 2020), has unprecedentedly changed tourism market on a global scale, reflecting on a 78% drop on international tourist arrivals by September of that same year, causing a loss of US\$ 1.2 trillion in export revenues from tourism, and a 120 million direct tourism job cuts (Sigala, 2020). According to this author, apart from the temporary disruption of the tourism market worldwide, tourism researchers now have the obligation to embrace this unparalleled crisis and reset many of the former methodologies, to a more collaborative, out of the box and social response intended investigations.

The qualitative method aims to reduce 'dehumanization' of the quantitative investigation, allowing interviewees to express their thoughts and opinions about the subject of study, in their own words. Regarding FGs, the process of knowledge production becomes more collaborative, in-depth, and specialized, because of peer recognition, as well due to dynamics established between participants, during the session. In fact, according to Goodson and Phillimore (2004), FG, as a means of collecting qualitative data from a group of pe-

ople around a particular topic, becomes an unique environment to identify trends and discuss news formally. When submitted to a group of experts on the subject in question, it can also be used to verify previous research data. Also, through direct participation, the researcher can extract more categories of knowledge than in a survey, and print a more participatory dynamic in his research, in a free-flowing disposition, as underlined by Rachão (2020).

Finally, Goodson and Phillimore, (2004) and Ryan and Bernard (2000) also suggest the possibility of visual stimuli, to increase effectiveness on the FG, namely in the deepening of shared reflection, thus providing immediate solutions to the discussed theme, referring to a case study that analysed the importance of international tourists' preferences in tourism marketing.

3.2. The Portuguese Food Experts Focus Group

As perceptions related to food preferences are implicit to human nature and, a priori, subjectively categorized, we chose to conduct a qualitative study, through an exploratory FG of experts in several food related areas (Table 1), bearing in mind the food scope of each participant. The main question behind the interview script and other stimuli, was: "What food tourism segments could exist in Portugal?".

As a pre-structure to this group dynamics, two tables of contents were created, through previous literature review: transitory definitions on food tourism segments, and provisional characteristics for potential emerging segments. Four major segments were identified, receiving temporary designations, extracted from literature review, as shown in table 2.

Table 1 | Professional characterization of the experts' group (participants of the FG)

Participants	Professional background	Current professional activity	Years of experience	Main areas of interest
E1	Nutrition Sciences, bachelor's degree	Nutritionist (author of regional food identity project, awarded by the Food Nutrition Awards)	Up to 5 years	Monitoring and consulting in nutrition, sustainable food and food identity areas, co-author of food territory inventory projects
E2	Tourism, PhD	Professor and higher education researcher at Polytechnic Institute (network of collaboration in rural and wine tourism project)	Up to 20 years or more	New tourist products, gastronomy tourism and wine tourism, monitoring and scientific research in these areas
E3	Cooking course	Award-winning chef with honours, consultant and book author, culinary program presenter	Up to 20 years or more	Research and book publication on food heritage, consulting on healthy eating to major food chains
E4	Chemical Engineering, PhD	Professor and higher education researcher (integrated in a national Associate Laboratory focused on food technology, among other fields)	Up to 20 years or more	Food and Biomedical Science and Engineering, new product development for food industry, supervision of specialized research in the sector
E5	Hospitality and Restaurant Industry, specialist	Hotel entrepreneur and higher education professor (regional director of national catering association and deputy director of its national section)	Up to 20 years or more	Tourism, hospitality and restaurant industry in its business management and top leadership components, specialized consultant in hotel legislation
E6	Cooking course	Award-winning chef, co-owner of award-winning restaurant, Flavours and Senses Award on seasonal and vegetarian expertise	Up to 15 years	Seasonal and sustainable food, food identity and signature cuisine
E7	Attended a law degree	Journalist and entrepreneur in food media press and gastronomic events (coordinator of restaurant industry magazine of national impact)	Up to 20 years or more	Gastronomy and society, social and gender equity, management of national competitions and events in top restaurant industry

Source: Own elaboration

Table 2 | Provisional segments in food tourism, according to corresponding literature review

Food tourism provisional segments	Authors
Luxury Restaurants Tourism	Barrère et al., 2009; Bertan, 2020; Chen et al., 2017; Kim et al., 2018; Liberato et al., 2021; Peng et al., 2020; Williams et al., 2018.
Gastronomic Tourism	Cunha et al., 2019; Gyimóthy, 2017; Henriques & Custódio, 2010; Pearson & Pearson, 2017; Polat & Aktaş-Polat, 2020; Privitera et al., 2018; Rachão et al., 2019; UNWTO, 2017.
Culinary Tourism	de Jong & Varley, 2017; Duralia, 2017; Ellis et al., 2018; Gretzel et al., 2019; Ji et al., 2016; Liberato et al., 2020.
New Food Trends Tourism	Bertella, 2020; Giovanna Bertella & Vidmar, 2019; Gurău & Dana, 2018; Higgins-Desbiolles & Wijesinghe, 2019; Mitchell & Shannon, 2018; Sikkiram, 2014.

Source: Own elaboration

Given the pandemics situation lived throughout this research, the FG was carried out online, through a synchronous platform. As the moderator, the supervisor and the participants were not in person, it came to our understanding that the three tailored made moments of visual stimuli, prepared for the session, became a solid dynamics to help in-depth and specialize data (Goodson & Phillimore, 2004; Rachão, 2020; Sousa, 2018). The visual

stimuli were composed by:

- (i) Four restaurant images, with corresponding defining characteristics, according to Chen et al. (2017) and Bertan (2020);
- (ii) Food tourism chart with its proposed four segments, elaborated by the main researcher;
- (iii) Theoretical model of culinary food tou-

rism, based on Liberato et al. (2020).

The content analysis was carried out by webQDA CAQDAS software, allowing the four restaurant images codification and highlighting their characteristics, narrowing down possible visual ambiguities (Costa & Amado, 2018).

It should be noted that TDs' food images, particularly concerning digital branding, is becoming increasingly a research subject, as shown by the following authors: Gyimóthy (2017), Horng and (Simon) Tsai (2010), Kim et al. (2018), Lai et al. (2019), Liberato et al. (2021), Matwick and Matwick (2018) and Scorrano et al. (2019).

The FG interview script, divided into four operative blocs ('Main themes', 'General objectives', 'Specific objectives', and 'Example questions') was organized in a colour/time per answer system, and had the following key themes:

- Perceptions concerning food;
 - Perceptions about the restaurant industry and its sustainability;
- Perceptions about the connection between food, the restaurant industry and tourism;
- Presentation of visual stimuli (moments I, II and III);
- Perceptions concerning food tourism market and COVID-19.

Formal contact with the experts was made by email, and an informed consent was sent, as well as an online form, for these participants to fill out sociodemographic data and self-professional characterization before the FG. According to several authors (Duralia, 2017; Ellis et al., 2018; Ji et al., 2016; Liberato et al., 2020; Sorcaru, 2019; Tsai & Wang, 2017; Williams et al., 2018), these two aspects are crucial on the individual perceptions towards food tourism.

The following image (Figure 1) shows the cloud of words most talked about during the session.



Figure 1 | Cloud of words from the key themes addressed throughout the focus group
Source: own elaboration based on the CAQDAS WebQDA

The recorded session was *verbatim* transcribed by the moderator (and main researcher), who also created the first provisional tree node from this data, through the CAQDAS. To assure that any data was not unconsciously misguided to the overall objectives of the study, one of the co-authors of this article not present during the FG, double coded the same text, through the same CAQDAS, as suggested by Costa & Amado (2018).

4. Intermediate results

The final tree node (Figure 2) is composed of five categories and seventeen subcategories. The subcategories of 'Challenges and answers in Food tourism' and 'Professionalization in the restaurant industry' were adopted after the second coder's suggestions. The category most talked about was 'Food tourism market' and due to its data saturation, moment I of visual stimuli was analysed separately and later inserted in the corresponding text (Table 3). This data was then sent by email to all participants, for verification and feedback (Costa & Amado, 2018), now included in this article.



Figure 2 | Tree node of categories and subcategories used for the coding of the focus group transcription
Source: Own elaboration through the CAQDAS WebQDA

4.1. Eating habits

In this category, E1 referred that, nowadays, foodways go beyond the commonly known ‘diets’, specifying that there are also food options and food styles.

Concerning the subcategory ‘Diets’, the most common nominated by E1 and E3 were traditional Portuguese diet, Mediterranean, Vegetarian, Macrobiotic, Vegan, Lacto-ovo vegetarian and the Atlantic diet.

In this section, the subcategory that presented more group dynamics, was ‘New trends in food’, where E6 pointed out the vegetarian and vegan food, available in his restaurant:

“(…) this is bringing a breath of fresh air to a market, which I think did not exist, that was little explored (….) there was a stigma concerning vegetarian food (….) now, my clients,

not necessarily vegetarian, are open to this kind of cuisine”.

In another perspective, E4 also indicated meat substitutes in food industry as a trend, when creating new food products:

“We just heard the testimony of a restaurant that doesn’t use meat or fish... the example might be exactly that! Meat substitutes have been a field of great development in food industry”.

4.2. Food identity

Regarding the first subcategory of this section, ‘Storytelling’, there was much debate, specially between E3, relating it to food heritage, and E2, connecting it to the tourism market. According to

E3, much of the current notions we have towards Portuguese foodways are recent constructions, namely narratives created during our dictatorship period:

“(…) when we talk about traditional Portuguese cuisine, we have to think about what traditional Portuguese cuisine is. There is a cuisine born in the 40’s (XX century), in the middle of the ‘Estado Novo’, which is listed as being the traditional Portuguese one (…) being, in the end, a recreation of the dictatorship itself”.

The same interviewee also stated that it is very important for this narrative to be acknowledged as an inherited storytelling, to properly identify which actual food products and traditions Portugal has, and what can differentiate this TD from others, through food.

Concerning ‘Authenticity’, E6 considers that his vegetarian restaurant fits in the authentic food Portuguese identity, because it uses local and seasonal products and works with local producers.

From his current work experience (managing several discussions cook groups organized by regions), E7 concluded that Portuguese interior regions pay more attention to local products and are more attentive towards food heritage, whereas the two most populated cities in Portugal, Porto, and Lisbon, have a more cosmopolitan approach to food.

Describing ‘Typical dishes’, the most listed were fish cataplana, fish stew, *Cozido à Portuguesa*, sardines, and the one most identified was codfish. Referring to the ‘Endogenous products’, the ones identified were beans, chickpeas, seaside fish, sausage-meet products, but also plant based products.

4.3. Food tourism market

This category aroused most discussion and generated most data. Regarding ‘Touristic food products’, the following products were listed: routes, events, creative products that privilege the tourist experience, restaurant industry and chefs, endogenous products and local markets.

Nevertheless, E2, E3 and E5 talked about this theme connecting it to what they perceive to be the leading Portuguese touristic food product, Gastronomy and Wines, as focused by E5 but, in his opinion, mainly concerning resident’s demand.

Concerning ‘Touristic food demand’, E2 mentioned that in the last years, Portugal has faced an enormous touristic demand, and that gastronomy became an autonomous touristic product, becoming the most active qualifier. The international demand for Michelin restaurants is, according to the same interviewee, such an example.

However, E3, E4, E5 and E6 agreed that there are other (and emergent) types of tourist demand. E3 and E5 agree that, on one hand, there is a globalization of the Portuguese food demand and, on the other hand, a demand for informal foodways, as stated by E5: “There is an increasing demand on the part of tourists to somehow invade, to enter what is people’s daily lives. And this is enriching.”.

E4 and E6 believe that new food related tourist demand evolves sustainable and healthy living concerns, where E6 specified his restaurant’s client range:

“We are talking about people who, because of a healthy lifestyle or ideological reasons, have decided to alter their eating habits, others probably prefer a lighter lunch, or a lighter dinner (…). 60% of my clients are female because they are more openminded to this type of cuisine”.

Regarding 'Food tourism segments', most of this subcategory's coding was taken from Moment II and III of visual stimuli, being the theme with longest (and divergent) debate. Before visual stimuli, all participants talked about gastronomy tourism, being this the most used expression, as generically defined by E2:

"Gastronomic tourism is not the food itself, but the whole history around food, around the chef, and all the storytelling that we communicate around it, that's why tourism technicians have to be prepared to know more about food products which are being worked on these territories, according to the diets that have been mentioned".

Nevertheless, to E3, cuisine in Portugal is, nowadays, a compromise situation between traditional food consumption and new foodways, due partially to tourism demand, underlining the transformation of this sector and implicitly identifying more than one food tourism segment:

"In a way, we have a cuisine that is recognized by those who visit us of comfort food. A Portuguese cuisine with very local characteristics. And then there's a cuisine that, let's say, is more cosmopolitan, more broad, more European. Just like so many others around the world, which, in any case, has its authors and that, somehow, manages to be at the forefront. I think we, with these last years of tourism demand, have been able to show the capability to transform ourselves and make ourselves known in a different way".

After introducing visual stimuli, E6 said that there are several types of food tourist demand,

when visiting a country, either to go and visit broadly its culture, through food, or to get to try a specific restaurant, or a specific chef's cuisine. The same interviewee agreed with the proposed four food tourism segments, as E4. In another perspective, E7 rejected the 'Culinary tourism' proposal from Moment III, strongly disagreeing with the idea of naming Food Tourism as the overall touristic food related activities, instead of the established Gastronomy Tourism: "(...) the correct expression to use is gastronomy tourism. (...) It's one thing when we talk about the categories of restaurants and another thing when we talk about tourism. It's always gastronomic tourism".

To reach a consensus, broadening tourists' food related preferences, E1 proposed: "And food tourism, why can't we call it food tourism?" As a closure to this category, E2 underlined the following:

"We should mention that literature review in this area leads us to find several typologies, several names. (...) When I heard, just now, E6 talking, I totally agree with him. We have people who travel, and who can be considered gastronomic tourists (...) but they just want to go abroad and experience food".

In the subcategory 'Challenges and answers in food tourism', three key ideas were underlined: the impossibility to have in-depth knowledge of the restaurant industry, as stated by E5 (and corroborated by E7):

"Our association, which is the largest association in the country, considering this sector, does not have a study, an impact about this market, or even a percentage for what kind of food consumption restaurants in Portugal decide to work in".

The second key concept was the concern about Portuguese cuisine losing its identity due to the emergent tourism demand, something talked about by E2, E5 and E3, quoting the last:

“Some restaurants decided to opt for fast money, with international cuisine, whereas others decide to go for the (Michelin) stars (...) There is a "prostitution" of local gastronomy, which has transformed our big cities almost into "fast food" shopping centres, where we have everything for sale and where, suddenly, we begin to create the idea that, in Portugal, a lot of tapas and snacks were ate as meals. 20 years ago it was unthinkable, this used to be Spanish traditional food”.

Finally, the third main idea was related to sustainability issues as a professional challenge in recent foodways. E4 and E6 agreed on this matter, and to E6, the challenge relies in the capability to present an answer to an emergent demand for overall sustainability, that his clients are looking for.

4.4. Restaurant industry in Portugal

The first FG interactive moment using visual stimuli (Moment I), had a very good response by all participants and originated consensual results (Table 3) in the subcategory ‘Main types of restaurants in Portugal’.

According to ‘Professionalization of the restaurant industry’, E5 and E7 agreed about an existing lack of in-depth market studies in this sector, which does not allow an accurate knowledge of this industry, as already quoted in subcategory ‘Challenges and answers in food tourism’.

E5 and E7 also state that Portugal has been witnessing a growth in the professionalization of restaurants’ human resources, generating two main results: chefs’ dignity and status, and the possibility for them to also become restaurant owners. According to E7, this is a phenomenon that arrived too late to Portugal, comparing to other European countries.

Ultimately, E6 pointed out that the current structure of the professional courses unenabled him to optimize the ecological footprint of his restaurant.

Concerning ‘Restaurant industry and COVID-19’, three main concepts were discussed: the crisis that this sector is facing; its capability of reinvention (some of the examples used were the take-away and delivery format, the terraces, the ability to partially transform the line of business from restaurant to grocery); and the trust factor, as a key element for the economic recovery. As E1 stated:

“The situation we are facing makes it clearer the need for trust (...). I think this comes from the basis, in terms of good practices, hygiene and food safety, among others. But I think it’s something that’s going to spread out to other areas, like food products related choices, the restaurant’s concept, team, and its identity. We’re actually in a transitional phase, where obviously there’s a lot of economic and social difficulties, but the ones in these conditions will survive”.

Table 3 | Moment I coding with visual stimuli applied to the participants

Main types of restaurants and their characteristics	References
SIGNATURE CUISINE RESTAURANT	
Exquisite ambience	4
Innovative cuisine	12
Local and exclusive ingredients	2
Artistic plating	3
Pricing for high financial capability customers	2
Sophisticated customers (domestic and international)	3
Fine dining service	3
PORTUGUESE REGIONAL CUISINE RESTAURANT	
Traditional ambience	9
Regional cuisine	11
Endogenous and flagship ingredients	8
Plating on platter	2
Average Price	1
Local, national, and international customers	3
Professional service	1
DISH OF THE DAY RESTAURANT	
Informal ambience	6
Simple cuisine	5
Typical ingredients	3
Uncompromised plating on platter	1
Low price	2
Informal customers (domestic and international)	4
Semi-professional service	2
VEGETARIAN TRENDS RESTAURANT	
Casual ambience	3
Alternative cuisine	10
Plant based ingredients	8
Creative plating	5
Customers in search of a healthy lifestyle	4
Price built through sustainability indicators	1

Source: Own elaboration

4.5. Sustainability in food related activities

The subcategory ‘Environmental sustainability’ was much discussed, especially by E6, regarding his restaurant’s experience, evolving seasonal products, local producers and zero food waste. E4 also talked about his food industry experience, concerning the development of new food products related to meat substitutes and the reuse of potential industry’s food waste:

“Another big trend nowadays (...) is the problem of sustainability. Today,

the entire production line, from farmer to final consumer, must be prepared to minimize waste. And therefore, there are challenges that the industry and research institutions arise, to develop new products, or by-products, or ways to effectively decrease food waste”.

‘Economic sustainability’ was identified by E6 as a common practice in his restaurant due to his ecological concerns, but E5 stated that most restaurant’s owners or managers have profitability as

main concern, even when clashing with environmental issues:

“If we talk about sustainability and the measures that restaurants take, a lot of the time, when they take them, they . . . I’m not saying the owners’ concern is not genuine. But their big concern is whether this can be used commercially (. . .). In fact, I dare to say that, to most entrepreneurs, the concern is not sustainability. The concern is profitability. (. . .) Clearly there is pressure for profit, pressure to lower costs. Even for cheaper meals in affordable restaurants”.

In ‘Social sustainability’ E6 talked about role models in the restaurant area and their main ecological concerns towards their food businesses, and how he hopes his restaurant can have such an impact in people’s lives. E5 talked about immigration issues related to employees in the restaurant industry, and E7 underlined the quest for gender equity in the new chefs’ generation:

“This generation will be able to create a connection among people, concerning the social balance phenomena, such as the role of women, and overall integration. The paradigm of the cook in Portugal is not anymore a 30-year-old white man, not in Lisbon”.

Finally, as an overall conclusion to the discussion, E1 shared the following notions towards the future of the restaurant sector: the trust issue as a competitive advantage, the sustainability factor as a growing trend, and the urgent need for “(. . .) differentiation inside the restaurant industry, which I think, in common restaurants, is one of the major problems”.

5. Discussion and main findings

Gastronomy is not (yet, we add) the main reason for visiting Portugal (Cunha et al., 2019). According to international tourists’ questionnaires, only three, out of 267, indicated Portuguese gastronomy as main reason to visit this country. However, this represents a positive leap forward if compared to the survey conducted by Henriques & Custódio (2010), indicating that most of the tourists visiting Algarve would prefer international cuisine, then with a 94% representativeness in that region’s local menus.

As already mentioned in section 2, the actions of Tourism of Portugal and its national strategic plans (Turismo de Portugal, 2007, 2011, 2013, 2017), are strongly contributing to a global strategic repositioning of Portugal as a food destination. Nevertheless, the implicit correlation between Gastronomy and Wines tailored product and the established Gastronomy Tourism market, attaching to it all tourist food related activities in Portugal, may be undermining other food consumption needs and tourism demand for other foodways, as debated by the FG participants.

In fact, this theme did not generate consensus, as some of the experts recognize the need to rename this food activities to a broader notion (“*Turismo Alimentar*”, the same as Food Tourism) and others state that “*Turismo Gastronómico*” (Gastronomy Tourism) is the Portuguese food identity exclusive model.

Nonetheless, all participants recognized several restaurant typologies (Table 3) as being part of nowadays food tourists’ demands. The ‘Dish of the Day’ and ‘Vegetarian Trends’ emergent restaurant typologies in this FG, are not currently a part of Portugal’s tourism strategic promotion but have already been assumed by several authors as food consumption segments within international tourism demand (Table 2).

The findings make it clear the need to deepen research on food tourism demand, so a fu-

ture research proposal is presented in the final section. Also, the authors recognize that the qualitative methodology designed for this Portuguese food specialists' FG delivered enriching data and consistent results, becoming a compelling instrument to continue exploratory research on this subject.

Finally, three key concepts must be considered for future studies on this emergent market:

- i. The lack of in-depth data concerning the restaurant industry in Portugal, as already pointed out in section 2 and underlined by the FG participants, in section 4;
- ii. The need to analyse other tourist food consumption places either than the restaurant industry, and their potential corresponding tourist demand, according to Rachão et al. (2019b);
- iii. This area of investigation can become a powerful economic recovery tool, by allowing, among other specific actions, the creation of tailored-made promotion strategies for several segments within tourist food demand, particularly in a moment where COVID-19 will, undoubtedly, modify global tourist purchasing power and socioeconomic needs.

6. Future research: Portuguese, Spanish, and British tourists Focus Groups

Due to the previous conclusions, there is a clear need to continue this research, deepening the tourism demand market in Portugal and its food consumption needs and preferences. This subject was highlighted in the Focus Group, thus receiving most references in the CAQDAS coding process.

Next steps probably will focus on three main tourism demand markets in Portugal which, according to 2020 National Touristic Statistics, were

Portugal (10.732.302 visits), Spain (2.285.829 visits) and United Kingdom (2.145.902 visits) (TravelBI, 2020).

The methodology already applied for the food specialists' FG could be used in the following studies, intending to saturate this exploratory phase on the tourism demand subject, procedure also used by Rachão et al. (2019b). The participants can be grouped randomly through a snowball sampling, such as referred by Lugosi et al. (2020), using social networks.

The Focus Groups participants will then be chosen by diversified representativeness, according to literature review, concerning socio-demographic profiles (Duralia, 2017; Liberato et al., 2021; Robinson et al., 2018; Tsai & Wang, 2017), consumer behaviours during the trip (Ji et al., 2016; Madaleno et al., 2018; Williams et al., 2018), importance given to the TD's culture (Ellis et al., 2018; Özdemir & Seyitoğlu, 2017; Pearson & Pearson, 2017; Sorcaru, 2019), and search for authenticity of the TD (de Jong & Varley, 2017; Ellis et al., 2018; Özdemir & Seyitoğlu, 2017).

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