



Analysis of the Implementation of Upselling Strategy in Food and Beverage Sales at Envy Restaurant, Holiday Inn Resort Baruna Bali

I. G.N. Bagus Adi¹, Nyoman Dini Andiani², Ni Luh Henny Andayani³

¹Education University of Ganesha, Indonesia

email: bagus.adi.2@undiksha.ac.id, dini.andiani@undiksha.ac.id,

Received on 27 September 2025	Revised on 6 November 2025	Accepted on 20 December 2025
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Abstract

Purpose: This study aims to analyze the implementation of the up-selling strategy in increasing food and beverage sales at Envy Restaurant, Holiday Inn Resort Baruna Bali, Indonesia.

Research methods: This research uses a qualitative approach, with data collected through in-depth interviews with servers, supervisors, and managers; non-participant observation; and document study in the form of sales reports and Standard Operating Procedures (SOPs). Data analysis was carried out using the Miles and Huberman model, which includes data reduction, data display, and conclusion drawing. Data validity was reinforced through source triangulation.

Findings: The findings show that while the up-selling strategy has been mandated by management, its implementation remains suboptimal. This is due to a lack of continuous training, limited understanding of effective up-selling techniques among servers, the absence of a structured performance evaluation system, and weak communication and motivation between management and staff. The menu engineering analysis also revealed that food and beverage items categorized as Plow horses (high popularity, low profitability) and Puzzles (high profitability, low popularity) should become the main focus for improvement through up-selling strategies.

Implication: Comprehensive training, a structured performance evaluation system, and intensive communication between management and staff are needed to optimize the potential of this strategy and achieve the set sales targets.

Keywords: Up-selling, food and beverage, sales strategy, hotel restaurant



INTRODUCTION

Tourist destinations around the world have been growing rapidly in recent years. This growth is driven by their ability to revive various sectors within them, contributing significantly to foreign exchange income, economic growth, and job creation (Andayani *et al.*, 2021). As one of the world's premier destinations, Bali receives a huge influx of tourists year after year. This is because Bali is known as a destination that prioritizes local cultural products in addition to its natural resources (Mudana *et al.*, 2018; Mudana *et al.*, 2023a; Mudana *et al.*, 2023b; Mudana *et al.*, 2024).

The hospitality industry is one of the service sectors that continues to grow rapidly and plays a significant role in the global economy. In hospitality, good service is at the core of its operational activities. The term "hospitality" itself refers to the attitude of being friendly and generous in welcoming and serving guests — a value that forms the foundation of the entire industry (Parantika, 2021). One important area within the hospitality industry is Food and Beverage (F&B), which not only provides consumption services but also serves as one of the hotel's main sources of income (Ananda, 2022; Agus, 2012).

Holiday Inn Resort Baruna Bali is a five-star hotel strategically located in South Kuta. The hotel features a signature restaurant called Envy Restaurant, which offers Asian and Western menus with a casual dining concept in an outdoor area overlooking Jerman Beach. This restaurant serves breakfast, lunch, and dinner with a seating capacity of approximately 120. To support the financial sustainability of the restaurant's operations, management has set a daily revenue target of IDR 30–35 million (Setiawan & Rahmawati, 2020). To achieve this target, direct selling strategies such as upselling are employed as one of the main approaches that must be implemented by the waitstaff. The Food and Beverage Department, typically found in the hospitality industry, is responsible for offering food and beverages to consumers, overseeing all aspects of provisioning and serving meals and drinks (Dewi & Andayani, 2024).

Upselling is a sales strategy where staff offer higher-value products to customers, either in the form of improved quality, larger portions, or additional products. The goal of this strategy is to increase sales volume and the average transaction value per customer (Prananta, 2024). By applying upselling, customers are encouraged to choose higher-priced menu items that also provide

added value, thereby boosting restaurant revenue. This technique not only benefits the service provider but also enhances the overall guest experience (Chaerunnisa, 2019; Priyantina *et al.*, 2016). However, the success of this strategy heavily depends on the communication skills, product knowledge, and initiative of the waitstaff in responding to customer needs and preferences (Setyorini, 2024a; Setyorini, 2024b). Marketing strategies play an important role in introducing tourism services to the wider public. In the context of hotel restaurants, choosing the right marketing model — including upselling — is key to effectively reaching customers through available digital channels (Andiani *et al.*, 2020).

Although the upselling strategy has been mandated by Envy Restaurant management, its implementation in the field remains suboptimal. Initial observations and interviews with related parties revealed that many wait staff still lack the technical skills and in-depth understanding of effective upselling methods. Some merely mention the product without engaging storytelling, fail to give recommendations based on guest preferences, or even skip the offer altogether. This situation is worsened by the lack of ongoing training from management, the absence of routine evaluations of individual performance in applying upselling, and weak reward or incentive systems for staff who successfully reach additional sales targets (Fadhila *et al.*, 2022; Paramitha & Ekasani, 2024).

The situation becomes even more challenging during the low season, when hotel guest visits decline. In such times, the upselling strategy becomes increasingly crucial as it can compensate for the reduced number of transactions. Every transaction becomes highly valuable and must be optimized. Thus, the upselling strategy is not only a marketing tool but also a part of the hotel's operational revenue sustainability strategy (Setiawan & Rahmawati, 2020).

This study aims to thoroughly examine how the upselling strategy is applied at Envy Restaurant, identify the various obstacles in its implementation, and evaluate the impact of the strategy on increasing food and beverage sales. By understanding these three aspects, the study is expected to provide a comprehensive overview of the effectiveness of upselling strategies in the hospitality industry, particularly in the food and beverage services of five-star hotels.

Theoretically, this research contributes to the development of service marketing studies, especially in terms of interpersonal sales strategies that involve direct communication between providers and consumers (Tannady, 2017). Practically, the research is expected to offer applicable recommendations to hotel management in designing training programs, incentive systems, and performance evaluations to support the overall success of the upselling strategy. In addition, the results of this study may also serve as a reference for future research in exploring sales strategies within broader and more diverse hospitality service contexts.

RESEARCH METHODS

This study employs a qualitative approach with the aim of exploring and understanding the experiences and perspectives of individuals directly involved in the implementation of the upselling strategy at Envy Restaurant, Holiday Inn Resort Baruna Bali. According to Creswell (2013), the qualitative approach emphasizes a deep understanding of a social phenomenon within its original context. This research does not focus on generalization, but rather on a specific understanding of upselling practices at the study site. In line with Agustinova (2015), this approach positions the researcher as the main instrument in the data collection process through observation, interviews, and document study.

The research was conducted at Envy Restaurant, which is part of Holiday Inn Resort Baruna Bali. The location was selected purposively, as it is the researcher's internship placement and serves as the primary site for implementing the upselling strategy in the food and beverage sector. The study took place during the odd semester of the 2024/2025 academic year.

The subjects of this study are the servers, managers, and supervisors of the Food and Beverage Service department who are directly involved in executing the upselling strategy. The object of the research is the upselling strategy itself as an effort to increase food and beverage product sales in the hotel restaurant. The sampling technique used is purposive sampling, which involves selecting informants based on specific criteria, namely those who are knowledgeable about and have direct experience with the implementation of the up selling strategy (Abdussamad & Sik, 2021).

Data collection was carried out using three main methods: interviews, observation, and document study. In-depth, semi-structured interviews were conducted with servers, supervisors, and F&B managers. These interviews aimed to explore their understanding of the upselling strategy, the obstacles encountered in its implementation, and the impact of the strategy on achieving the restaurant's daily revenue targets. Non-participant observation was used to record server behavior during tasks, promotional techniques used, and guest responses to upselling efforts. Document study included collecting sales reports, restaurant SOPs, and visual records of service activities relevant to the sales strategy.

The data obtained were analyzed using the Miles and Huberman model, which consists of three stages: data reduction, data display, and conclusion drawing. Data reduction was performed to filter relevant information from interview results, observations, and document study. Data were presented in the form of descriptive narratives, tables, and matrices to help the researcher identify patterns and relationships among data. The final stage was conclusion drawing, which was reflective in nature and formulated based on the overall findings to comprehensively answer the research questions (Rukajat, 2018).

To ensure the validity of the data, triangulation techniques were employed. Triangulation involved comparing data from various sources such as servers, supervisors, and managers, as well as using multiple data collection techniques including interviews, observations, and document study. Data validity was also reinforced through member checking, in which informants were asked to confirm interview summaries to ensure the accuracy and intent of their statements (Raco JR, 2010). Reliability was maintained by documenting the data collection process and ensuring the researcher remained neutral and objective throughout the research process.

FINDINGS

This study was conducted to answer three main questions: how the up-selling strategy is implemented at Envy Restaurant, Holiday Inn Resort Baruna Bali; what challenges are faced by the restaurant staff in implementing this strategy; and to what extent the up-selling strategy influences the increase in Food and Beverage (F&B) sales at the restaurant.

The implementation of the up-selling strategy at Envy Restaurant has been established as part of the servers' standard operating procedures. Holiday Inn Resort Baruna Bali regards this strategy as one of the key elements in achieving its relatively high daily revenue target of IDR 30–35 million. This strategy is highly relevant in the context of the hospitality industry, which is dynamic and heavily reliant on direct service interactions. In practice, servers are expected not only to take orders but also to offer additional higher-value items such as appetizers, desserts, premium beverages, and upsized portions.

Field observations showed that servers' understanding of the up-selling strategy varies. Most have a basic understanding of what up-selling is and how it is generally applied. However, when asked to practice it in real scenarios, only a few were able to do so effectively. For example, experienced servers were able to offer beverages with engaging narratives, such as emphasizing the freshness of a specific mocktail or recommending a dessert as the perfect complement to the main course. Meanwhile, other servers merely mentioned the product name without explaining its benefits or added value.

Most staff members have not received ongoing formal training on up-selling techniques. They only underwent a brief orientation session at the beginning of their employment, with no further coaching afterward. In the context of premium services such as those in a five-star hotel restaurant, communication skills and persuasive techniques are crucial elements that need to be continuously developed. The lack of training has resulted in inconsistent competency levels among servers, which ultimately affects both individual and team sales performance.

Interviews with the F&B supervisor revealed that although management is aware of the importance of up-selling, it does not yet have a strong system in place to support its implementation. The Standard Operating Procedure (SOP) does include the obligation to perform up-selling, but it lacks practical guidelines or clear performance evaluation indicators. As a result, there is no reward or punishment system that can motivate servers to exceed the minimum service standards.

In response to the second research question, the study identified various challenges in the implementation of up-selling. The main obstacles include the lack of continuous training, limited understanding of sales communication

techniques, and the absence of a structured evaluation system. Additionally, server motivation is relatively low due to the absence of a performance-based incentive system. Communication between management and staff is not consistently maintained in reinforcing the importance of up-selling, resulting in a gap between expectations and actual performance.

Table 1 presents a comparison of several menu items based on their classification and effectiveness in supporting up-selling:

Table 1. Menu Classification at Envy Restaurant
Based on Up-Selling Potential

Menu category	Menu name	Quantity sold	Classification	Strategic suggestion
Salads	Envy Caesar Salad	704	Plowhorses	Add premium toppings
Salads	Vietnamese Coconut Chicken Salad	368	Stars	Maintain, promote as signature item
Salads	Tuna Salad	329	Stars	Maintain

(Source: Envy Restaurant, 2025)

Regarding the third research question, the findings indicate that the up-selling strategy significantly impacts restaurant revenue, especially during the low season. In such conditions, the number of guests decreases, making each transaction more crucial. Servers who successfully apply up-selling techniques can increase a customer's total purchase by 10–15%, as demonstrated in the following January 2023 sales report (Table 2):

Table 2. Summary of Envy Restaurant F&B Revenue Performance (January 2023)

Revenue category	Projected value (IDR)	Actual value (IDR)
Lunch	3,596,275,499.98	360,159,119.98
Dinner	4,854,923,548.00	486,069,876.00
Total	8,451,199,047.98	846,228,995.98

(Source: Envy Restaurant, 2025)

The data in Table 2 shows that actual revenue reached only about 10% of the target. One factor contributing to the low achievement is the underutilization of the up-selling strategy. In the restaurant industry, especially one affected by

seasonal tourism, the success of up-selling becomes a key determinant of revenue. Up-selling helps increase the average transaction value per guest, which is especially vital when visitor numbers are down.

The gap between projected and actual revenue demonstrates that, although up-selling holds great potential, its current implementation has not yet been able to close that gap. This confirms the importance of improving staff training, establishing an effective reward system, and providing consistent guidance from management.

Document study also shows that top menu items such as Caesar Salad and Greek Salad are classified as "Plowhorses" and "Stars," meaning that while they are popular, they either have low margins or have not been fully promoted. Table 3 is a summary of the menu classification analysis:

Table 3. Menu Classification Based on Up-Selling Potential

Menu	Category	Quantity sold	Up-selling potential
Caesar Salad	Plowhorse	704	Add premium toppings
Greek Salad	Stars	415	Bundle with drinks
Baked Falafel Bowl	Puzzle	148	Revise promotional strategy

(Source: Adi, 2025)

The data (Table 3) shows an opportunity to integrate up-selling strategies with the menu, such as offering salads bundled with special drinks or introducing additional toppings with appealing narratives.

Conceptually, these research findings support up-selling theory, which emphasizes that offers must be tailored to the needs and profiles of customers. Educating customers is essential, but it cannot be done effectively if staff themselves lack a solid understanding of the products. This indicates that up-selling is not only a sales strategy but also a value-added service approach.

These findings are consistent with research by Prananta (2024), which states that up-selling must be supported by training, incentives, and strong managerial backing. Without these elements, the strategy will remain a policy without proper implementation. Therefore, a systemic and collaborative approach between management and staff is needed to transform up-selling from a mere obligation into a workplace culture.

Overall, the implementation of the up-selling strategy at Envy Restaurant is still not optimal. The barriers are systemic and interconnected, including a lack of technical training, weak internal communication, and low staff motivation. Up-selling has great potential to serve as a primary driver of daily revenue, especially when guest numbers are down. Hence, a comprehensive intervention is required, in the form of continuous training, strengthened service SOPs, and a performance-based evaluation system to ensure the long-term effectiveness of this strategy.

CONCLUSION

The up-selling strategy is one of the key approaches to increasing restaurant revenue, particularly in the hospitality industry, which heavily relies on the quality of personal service and direct interaction between staff and guests. In the context of Envy Restaurant at Holiday Inn Resort Baruna Bali, this strategy plays a strategic role in maintaining revenue stability, especially during the low season, when the number of visitors tends to decline and the value of each transaction becomes critically important. The implementation of up-selling allows servers to encourage guests to purchase additional or higher-priced products, thereby increasing the average spending per customer.

Although this strategy is included in the standard operating procedures and recognized as part of the server's responsibilities, its implementation in practice remains suboptimal. Data shows that actual sales achievement is only about 10% of the projected target. This indicates that up-selling has not been effectively executed, despite its substantial potential. Several obstacles hinder the implementation of this strategy, including the absence of continuous technical training, limited staff understanding of persuasive communication techniques, and the lack of a structured performance evaluation and incentive system that could consistently motivate staff. These barriers demonstrate that merely instructing up-selling through SOPs is not enough—it requires a comprehensive systemic support structure.

The menu engineering analysis in this study also reveals that several items categorized as *Plowhorses* and *Puzzles* have potential to be developed through the up-selling approach. For example, the Caesar Salad, which has high popularity but low profitability, can have its value increased by offering additional

premium toppings. The Greek Salad, classified as a *Star*, could also be promoted as part of a bundled package with a special drink. This suggests that product packaging and promotional narratives are essential components of an effective up-selling strategy. However, such approaches will only be successful if servers are equipped with deep product knowledge and strong communication skills.

Conceptually, the findings of this study reinforce the theory that the success of up-selling does not rely solely on the offer itself, but also on the readiness of the human resources implementing it. Servers must be able to tailor offers according to the needs and characteristics of each guest—something that can only be achieved through regular training and coaching. This is in line with the findings of Prananta (2024), who stated that the success of up-selling strategies is highly influenced by technical training, incentive systems, and supportive management structures. Without these elements, the strategy will remain merely an administrative policy that is ineffective in practice.

This situation indicates the need for more serious intervention from management to optimize the implementation of the up-selling strategy. Some recommended actions include strengthening regular technical training for servers, developing a performance-based evaluation system with clear indicators, and establishing a reward system to encourage work motivation. Additionally, internal communication between management and staff must be improved to ensure alignment between expectations and implementation. With a systemic and collaborative approach, up-selling can evolve from a routine task into a work culture focused on value-added service and long-term revenue growth.

The up-selling strategy has been implemented by some servers; however, its implementation is not yet optimal. The knowledge and skills of the servers in applying up-selling techniques remain limited, and the training provided has not fully addressed the practical aspects. The main challenges include the lack of continuous training, the absence of evaluation and incentive systems, and weak communication between management and staff. While the up-selling strategy has proven to have a positive impact on increasing restaurant revenue particularly during the low season it has not yet fully bridged the gap between projected and actual revenue.

The strength of this study lies in its focus on direct field practices and the involvement of relevant informants in the implementation of up-selling. Its novelty is reflected in the structured observation of up-selling strategy implementation in a five-star hotel restaurant setting, using a case study approach and menu classification analysis based on up-selling potential. This research provides an empirical overview that can serve as a reference for developing direct sales strategies in the hospitality industry.

This study also holds potential for further development for instance, by examining the effectiveness of simulation-based training programs for up-selling, exploring the use of digital media to support sales strategies, or conducting comparative analyses among various star-rated hotel restaurants in implementing similar strategies.

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