

Travel Activities & Motivation Survey
Wine and Cuisine Report

Travel Activities & Motivation Survey

Prepared By:

Lang Research Inc.

...on behalf of...

Ontario Tourism, Culture & Recreation

The Canadian Tourism Commission

The Northern Ontario Heritage Fund

The Saskatchewan Tourism Authority

Parks Canada

The Department of Canadian Heritage

Yukon Government Department of Tourism

Tourism B.C.

The Manitoba Ministry of Industry, Trade & Tourism

The Ontario Ministry of Agriculture, Food and Rural Affairs

The Atlantic Tourism Partnership

The Greater Toronto Hotel Association

Tourism Toronto

Ontario Casino Corporation

Interest In Cuisine and Wine Vacation Activities

Key Findings -

Canadians with an interest in vacation activities associated with cuisine (e.g., fine dining) and wine (e.g., tours of wineries, wine regions) were more likely to be from Quebec, Ontario, Alberta and British Columbia than from other provinces. In the United States, those from the Pacific Region (e.g., California, Oregon, Washington, Hawaii) and the South Atlantic (Florida, Georgia, North and South Carolina) and the Middle Atlantic ((e.g., Pennsylvania, New York, New Jersey) were most likely to be interest in cuisine and wine vacation activities.

In both Canada and the U.S., Affluent Mature and Senior Couples were the most likely to be interested in cuisine and wine. This is the prime target market for such promotional activity. Affluent Young Singles, Affluent Couples, Affluent Families and Affluent Mature Couples also exhibit an above average interest in cuisine and wine and should be considered secondary markets for such promotional activities. Clearly affluence is an important predictor of interest in such activities. Overall, these five segments represent 24.5 % of the Canadian adult populations (18 plus) and 27.3 % of the United States adult population.

Those who exhibited an interest in vacation activities associated with cuisine and wine were considerably more likely to have sought out vacation experiences associated with exploration (e.g., visiting historical sites, natural wonders), personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as night life) and romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). Advertising and promotional materials designed to promote cuisines and wine should emphasize the cultural, entertainment and romantic images of the destination specifically targeted at affluent couples, and to a certain extent, affluent singles. There should be an hedonistic quality to such promotions.

Participation in cultural and entertainment activities while on a trip is more closely associated with an interest in cuisine and wine than participation in outdoor activities while traveling. This association is especially strong for those who shopped or dined, attended high art performances (e.g., ballet, opera), attended concerts, carnivals or fairs, visited botanical gardens or visited casinos. These cultural and entertainment activities should be promoted in cuisine and wine vacation packages.

Those who exhibit an interest in cuisine and wine were also more likely to have participated in outdoor activities while on a trip and especially water sports (e.g., sailing, scuba diving), fitness activities, swimming and sunbathing, team sports, natural sightseeing (e.g., viewing wildflower & flora, going on picnics in park settings) and golfing. These sorts of activities are more likely to be undertaken by the more affluent traveler and especially affluent couples and singles.

Those interested in cuisine and wine are more likely to consult a larger number of information sources when planning their vacations and especially newspapers and magazines, travel agents, travel information offices, travel guides and the Internet.

Background

An association of Canadian Tourism Ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior.

This current study examines interest in travel activities associated with cuisine (e.g., fine dining) and wine (e.g., tours of wineries). The database was used to identify sectors of the market that exhibit high interest in such activities. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations and impressions of Canada and Ontario relative to the interest shown in cuisine and wine vacation activities. This report also provides an overall market potential of each segment of the market to identify those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada's/Ontario's wine and cuisine related vacation products.

Wine & Cuisine Interest Index

Construction of the Index

The TAMS Mailback survey contained 6 items specifically associated with cuisine and wine which were used to construct an overall Cuisine and Wine Interest index. These were:

- Having pursued the following vacation experience during the past 2 years:
“To experience the good life with fine cuisine, good wine, being pampered”
- Having participated in the following cultural and entertainment activities during the past 2 years:
 - ☞ Local outdoor cafes
 - ☞ Restaurant dining – regional or local cooking
 - ☞ Restaurant dining – internationally acclaimed restaurants
 - ☞ Touring a region’s wineries where you stay one or more night
 - ☞ Going to wineries for a day visit and tastings
- Indicating that the following new attraction would make them “a lot more interested” in taking a trip to Ontario:
 - ☞ A wine region such as the Napa Valley or Cote d’ Or in France

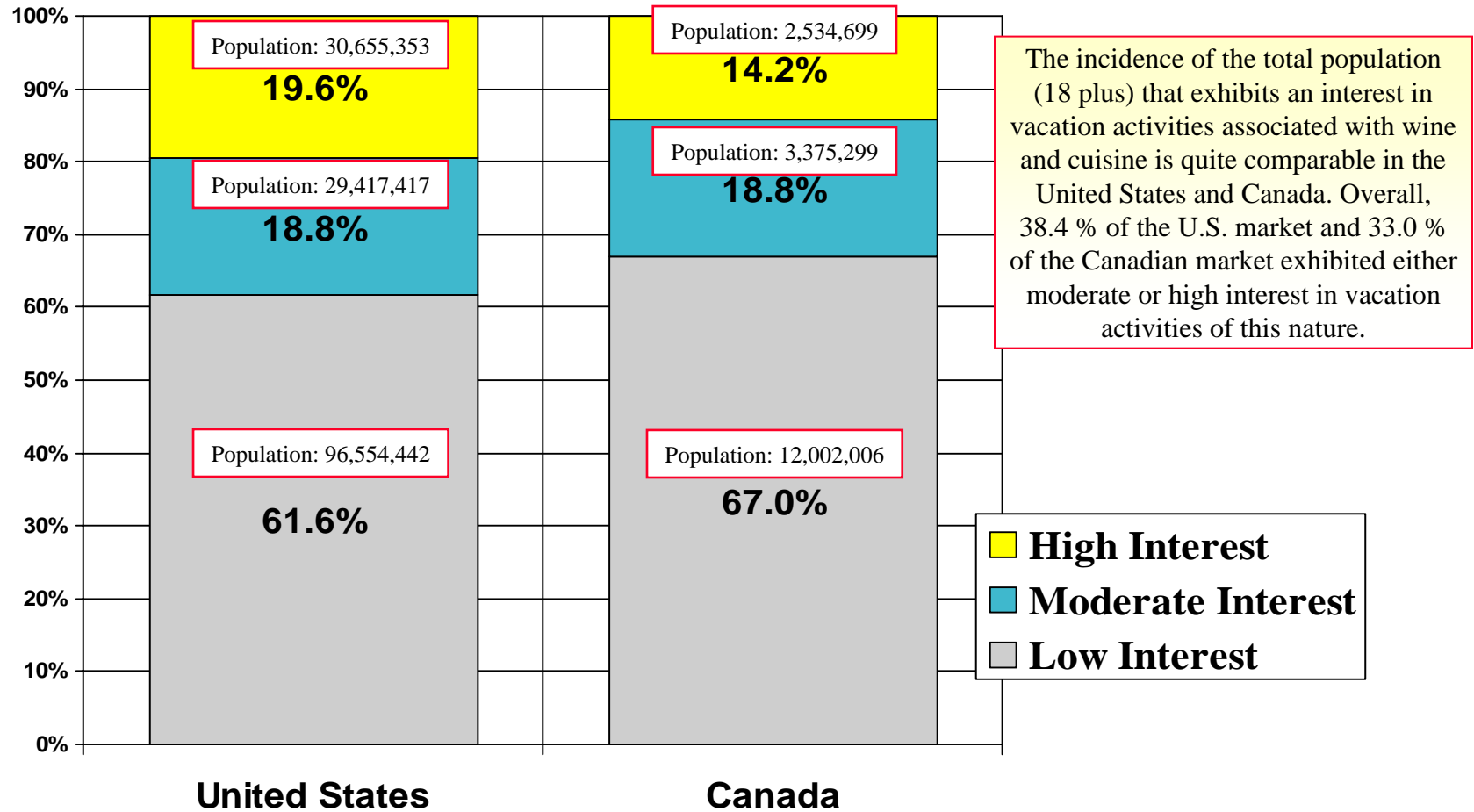
The responses to these six items were factor analyzed to construct the overall Cuisine and Wine Interest Index. Factor scores were computed and respondents were classified into three groups:

- Low Interest (Below average participation or interest in the six cuisine and wine relate activities)
- Moderate Interest (Average participation and interest in the six cuisine and wine relate activities)
- High Interest (Significantly above average participation and interest in the six cuisine and wine relate activities)

Interest in Wine and Cuisine Canada versus United States

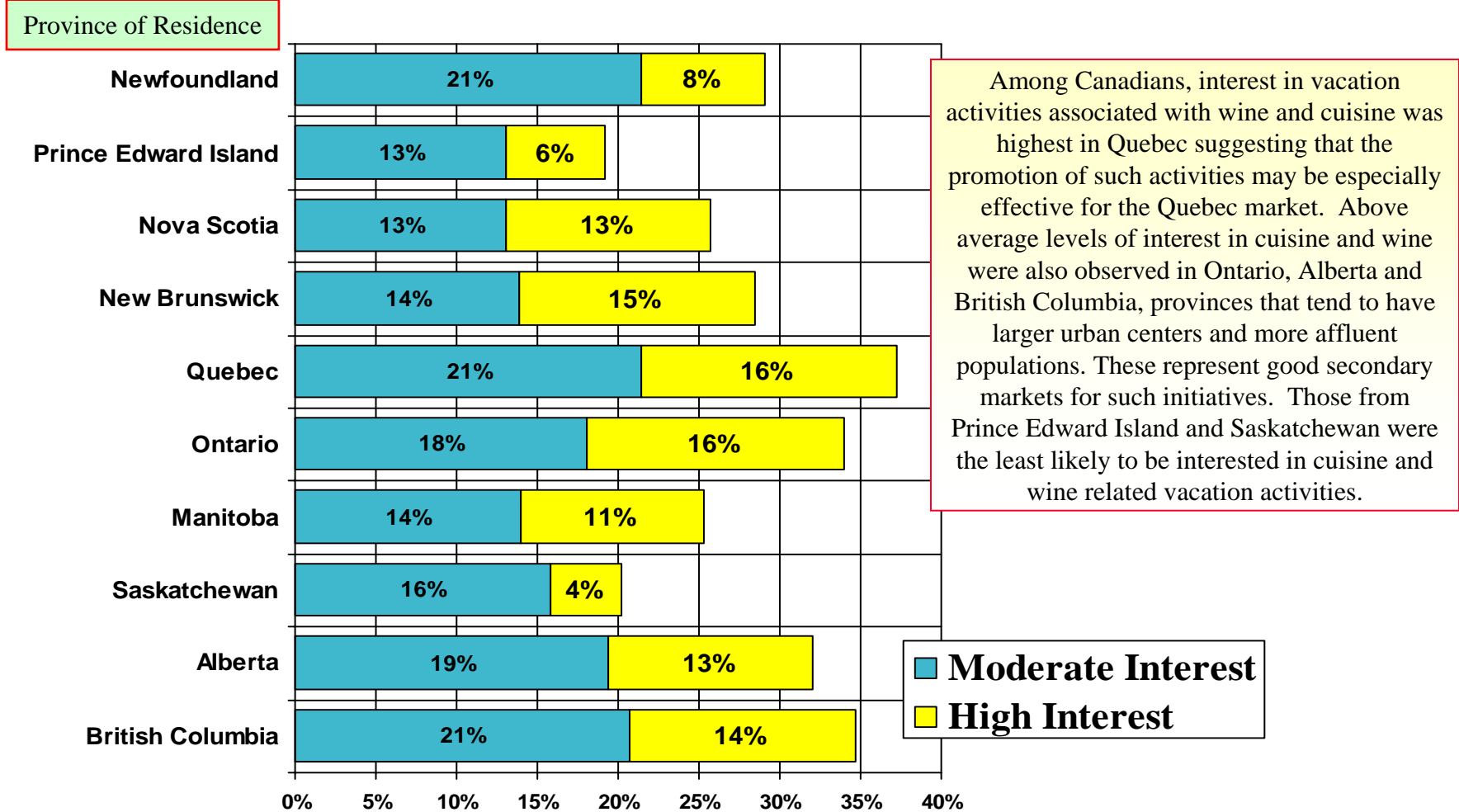
Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



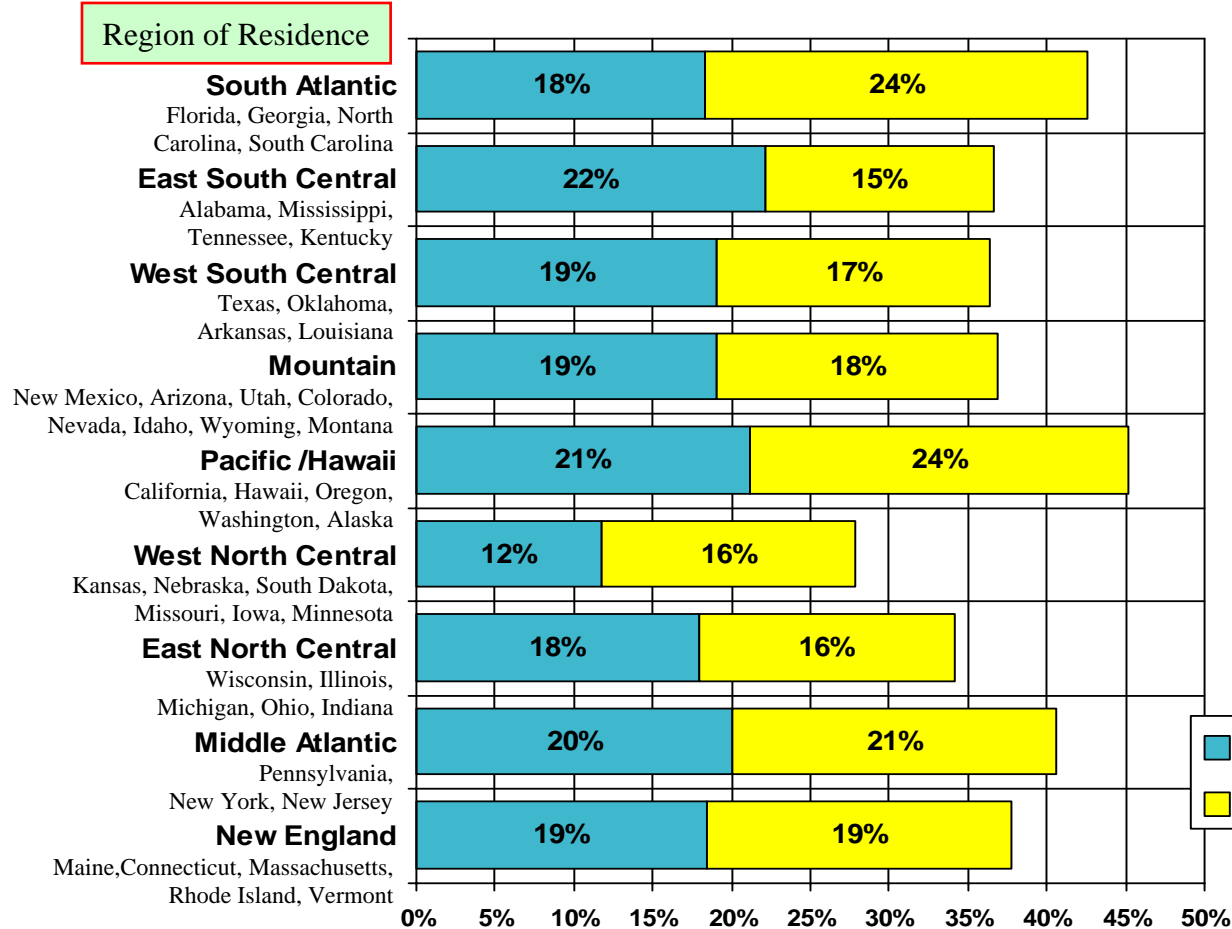
Interest in Wine and Cuisine: Based on Prior Travel Activities & Future Interest Canada: By Province

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



Interest in Wine and Cuisine: Based on Prior Travel Activities & Future Interest United States:By Region

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



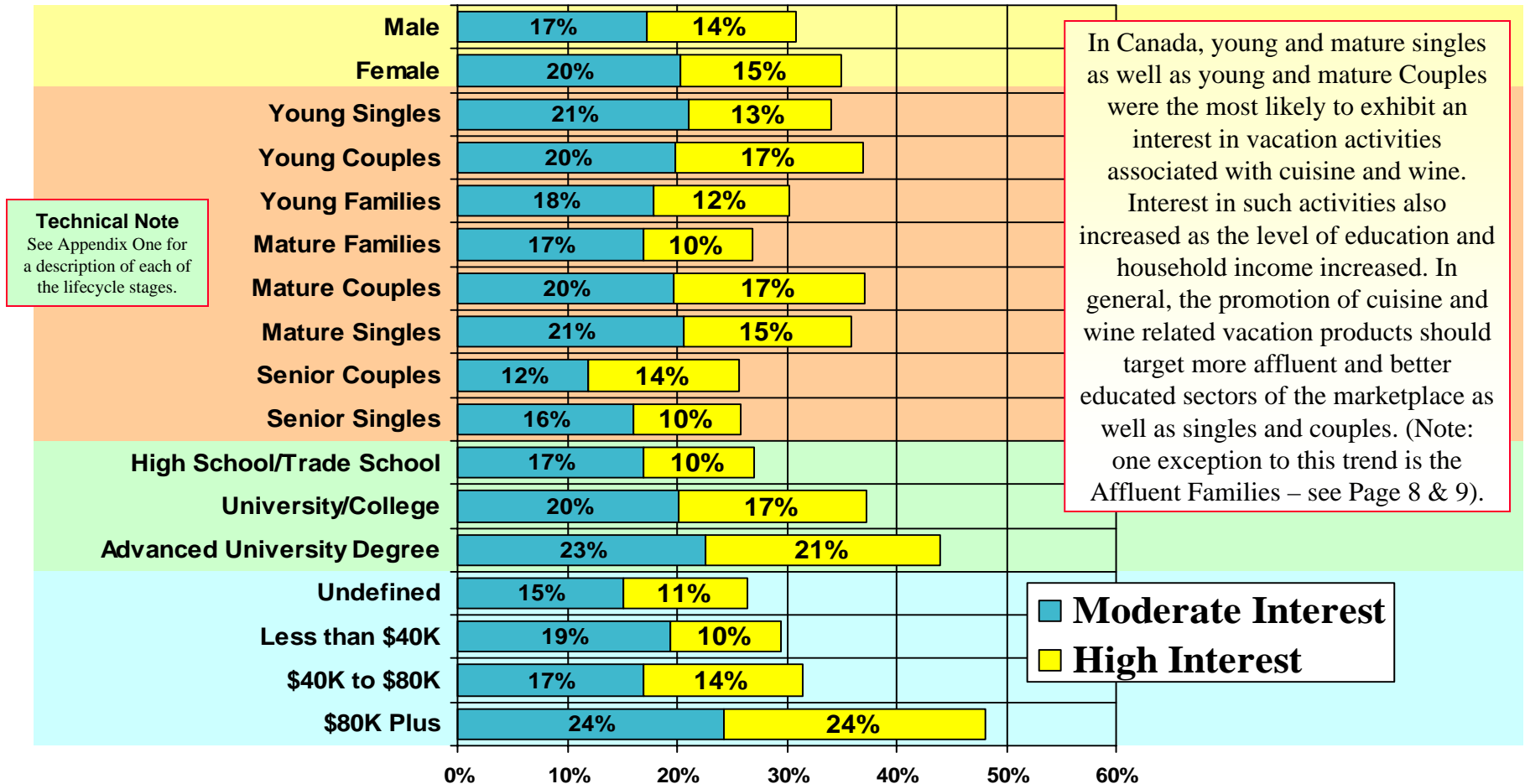
In the United States, interest in vacation activities associated with wine and cuisine was highest in the Pacific/Hawaii Region. There was also above average interest in the Southern Atlantic and Middle Atlantic regions of the U.S. These markets offer increased potential for the promotion of cuisine and wine related vacation activities. Those from the West North Central region were the least likely to manifest an interest in these sort of vacation activities.

■ Moderate Interest
■ High Interest

Interest in Wine and Cuisine Canada: By Demographics

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



Technical Note
See Appendix One for a description of each of the lifecycle stages.

In Canada, young and mature singles as well as young and mature Couples were the most likely to exhibit an interest in vacation activities associated with cuisine and wine. Interest in such activities also increased as the level of education and household income increased. In general, the promotion of cuisine and wine related vacation products should target more affluent and better educated sectors of the marketplace as well as singles and couples. (Note: one exception to this trend is the Affluent Families – see Page 8 & 9).

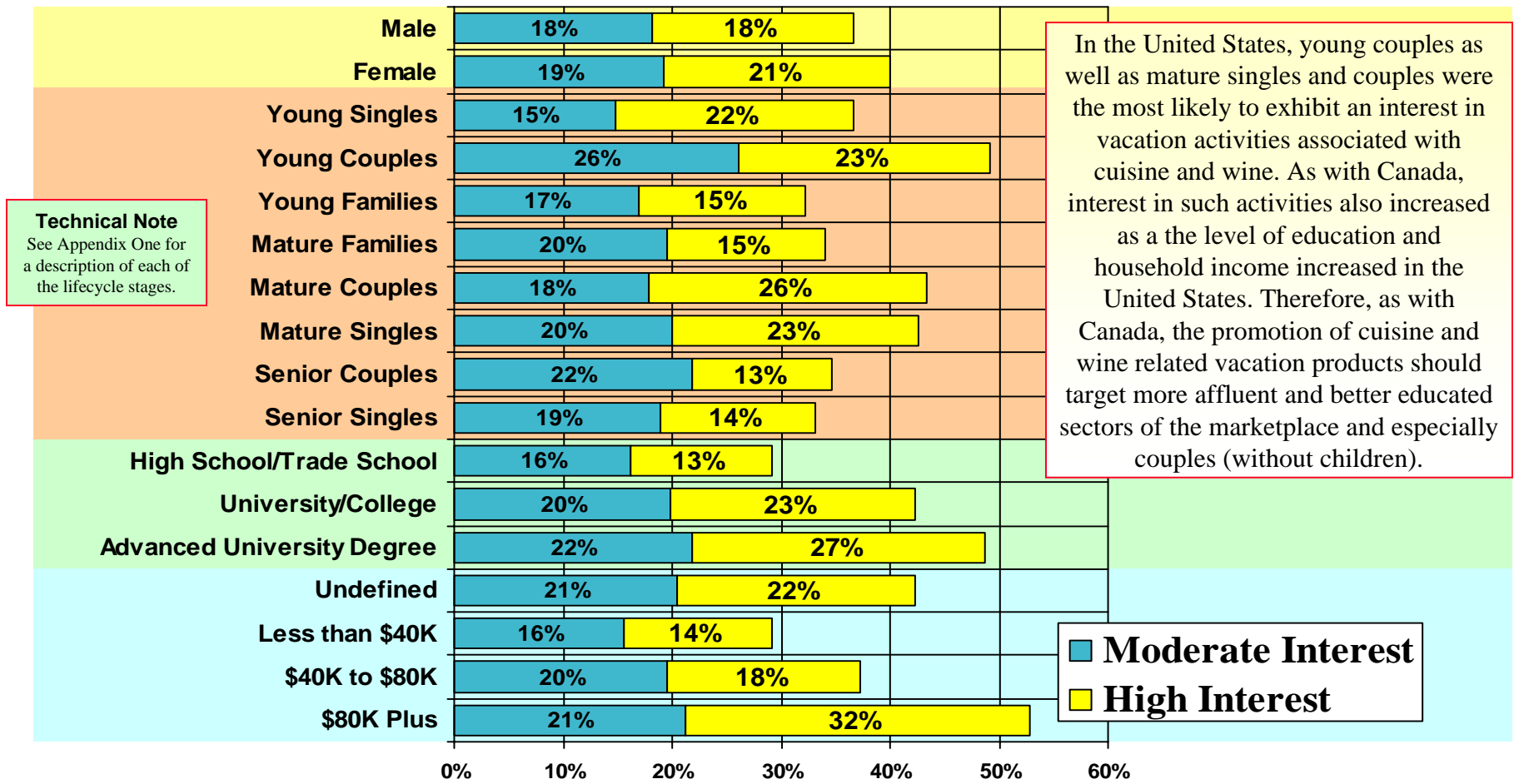
Moderate Interest
High Interest

Interest in Wine and Cuisine

United States: By Demographics

Based on Prior Travel Activities and Future Interest

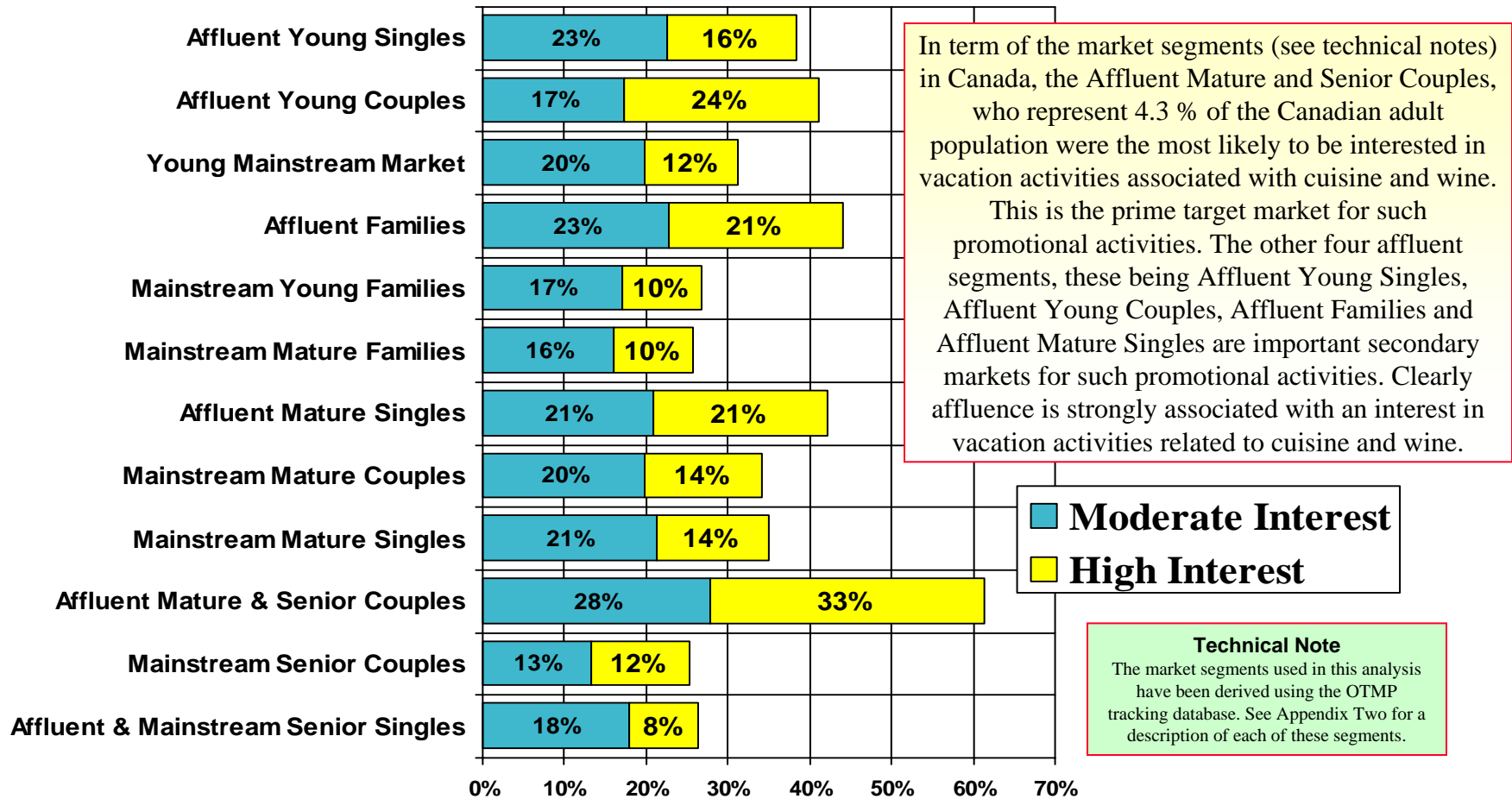
Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



Interest in Wine and Cuisine Canada: By Market Segment

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

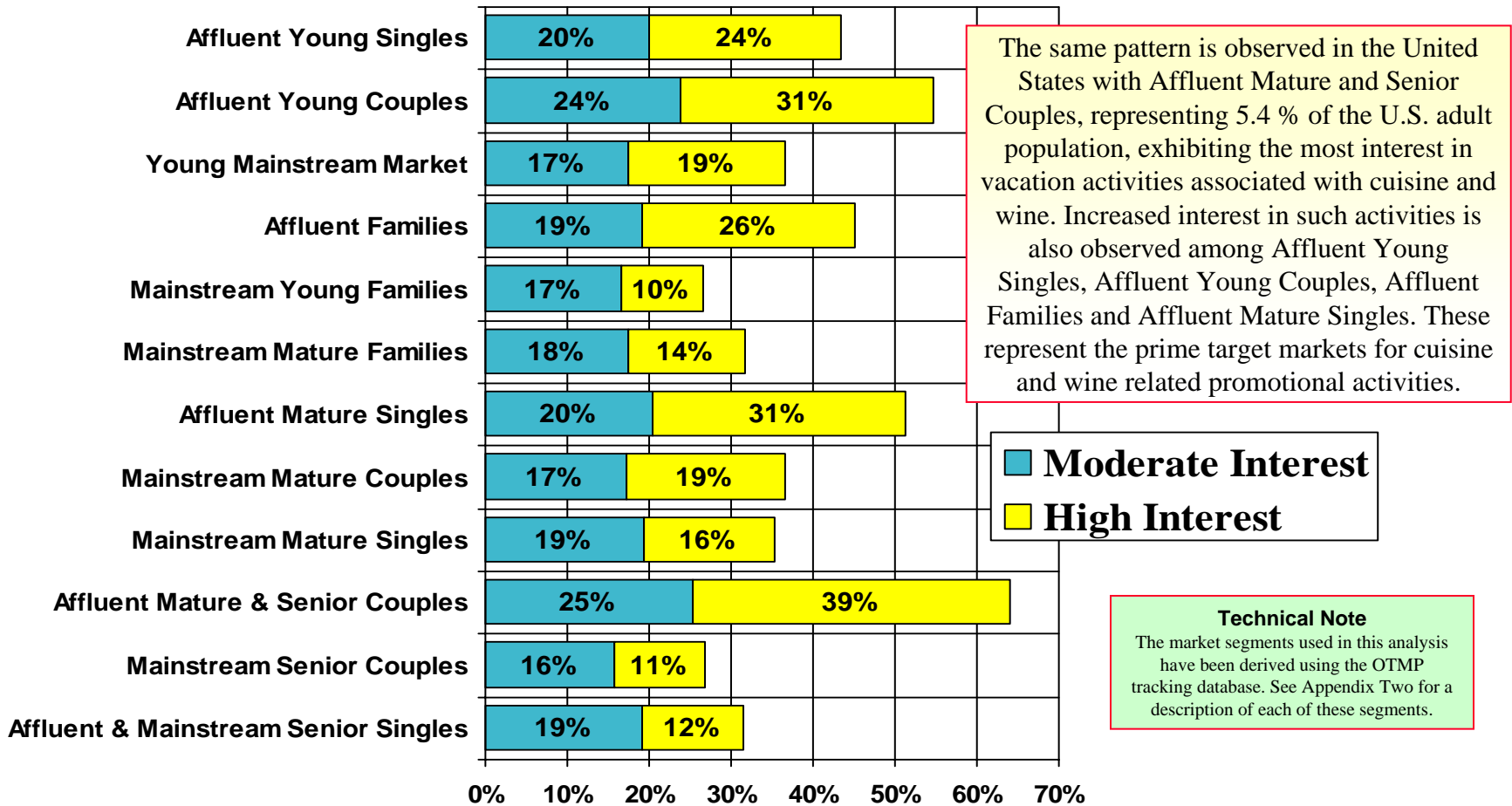


Interest in Wine and Cuisine

United States: By Market Segment

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

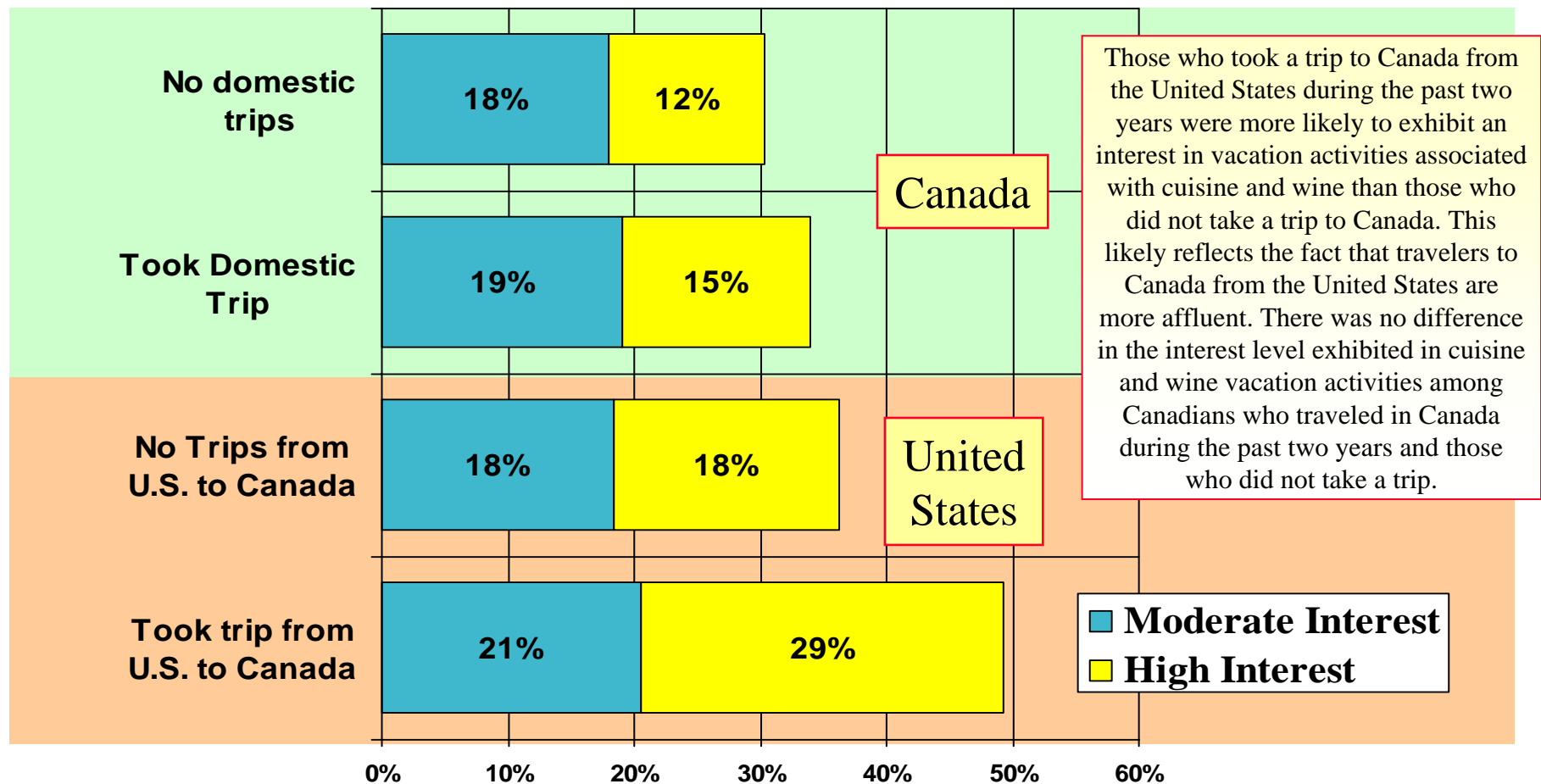


Interest in Wine and Cuisine

Canada vs. U.S.: By Trips In Canada Last 2 Years

Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

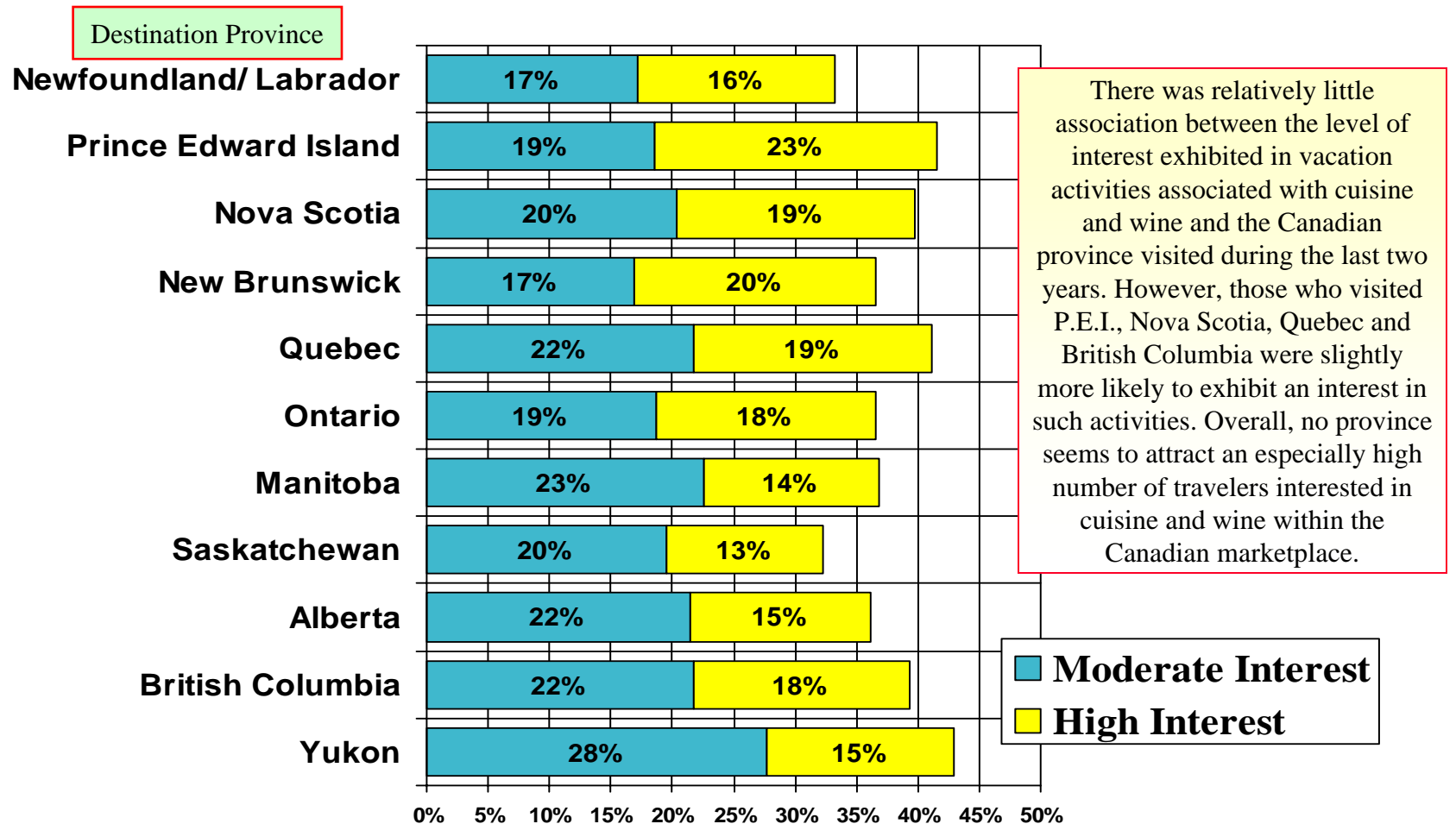


Interest in Wine and Cuisine

Canada: Interest By Province Traveled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Took At Trip to Each Province During the Last 2 Years

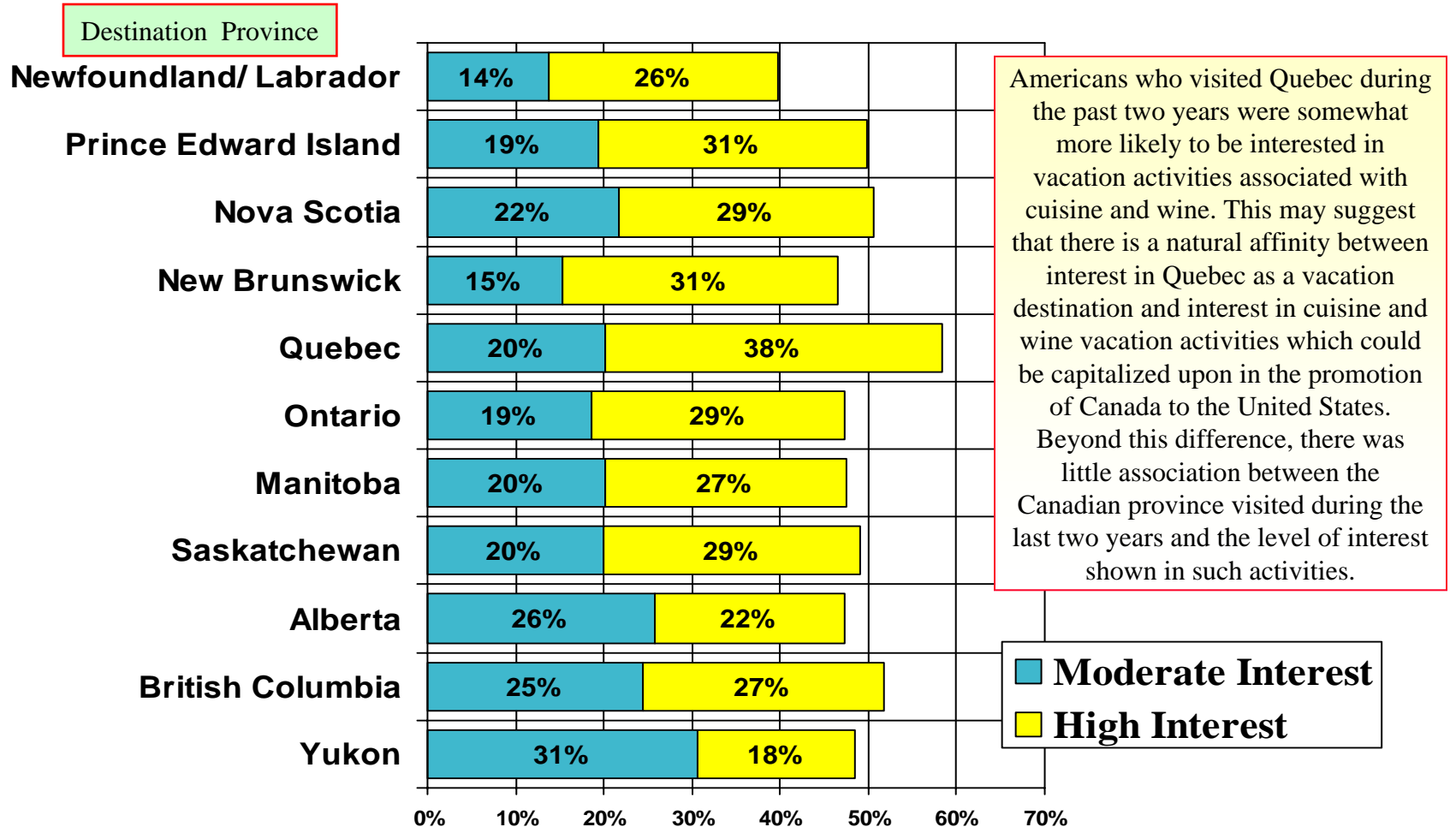


Interest in Wine and Cuisine

United States: Interest By Province Traveled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Took At Trip to Each Province During the Last 2 Years

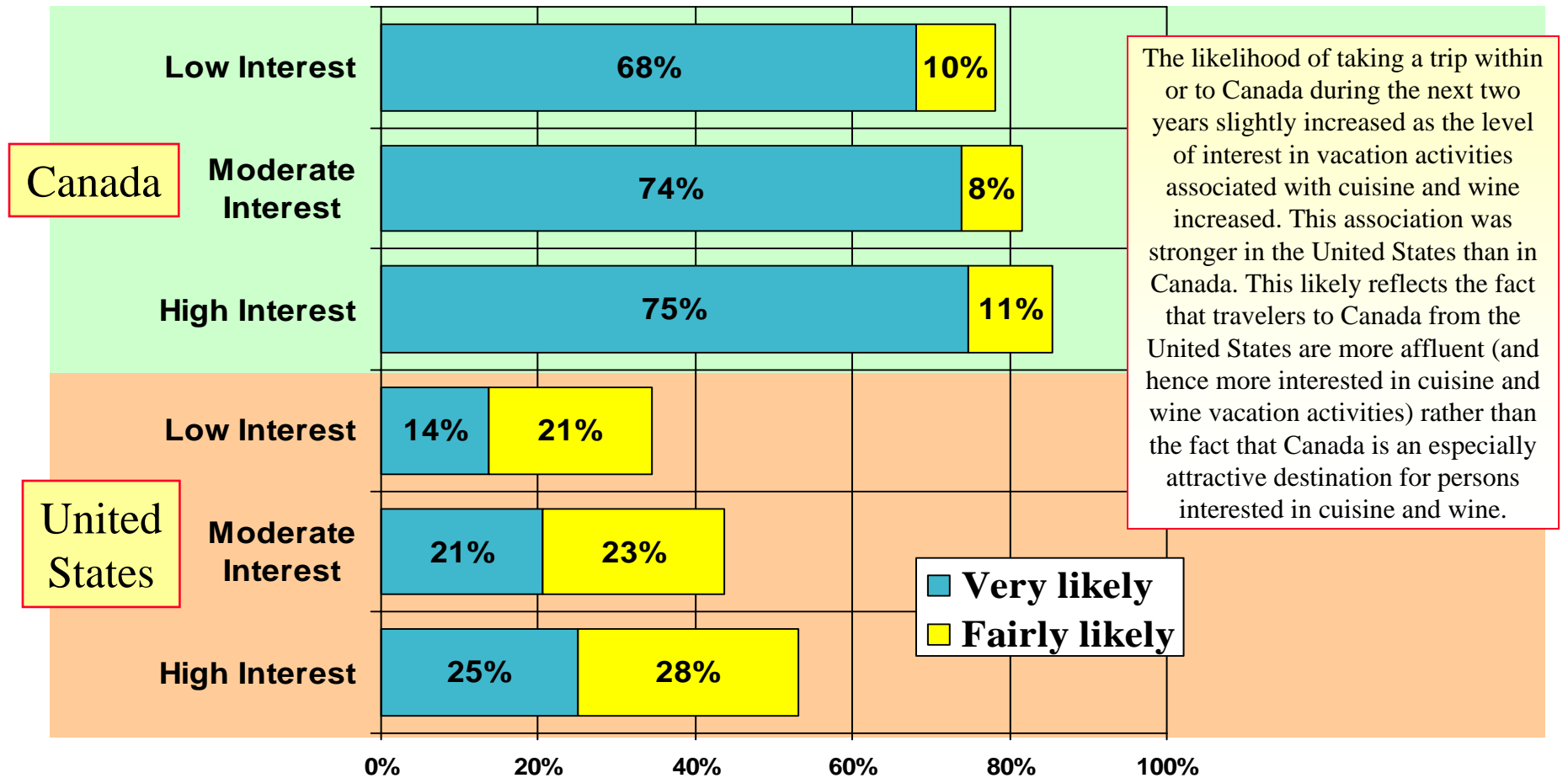


Interest in Wine and Cuisine

Intentions to Travel to Canada Next Two 2 Years

Interest in Wine and Cuisine By Intentions to Travel In Canada During Next 2 Years

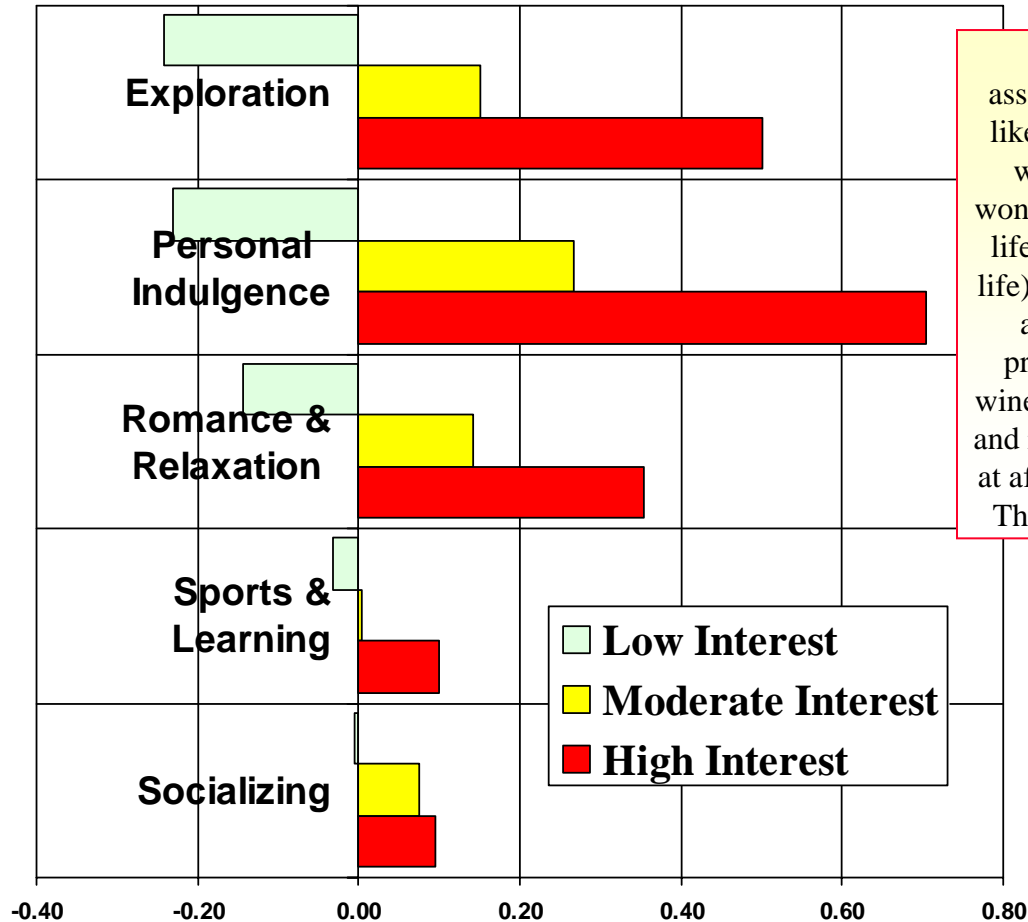
Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The likelihood of taking a trip within or to Canada during the next two years slightly increased as the level of interest in vacation activities associated with cuisine and wine increased. This association was stronger in the United States than in Canada. This likely reflects the fact that travelers to Canada from the United States are more affluent (and hence more interested in cuisine and wine vacation activities) rather than the fact that Canada is an especially attractive destination for persons interested in cuisine and wine.

General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



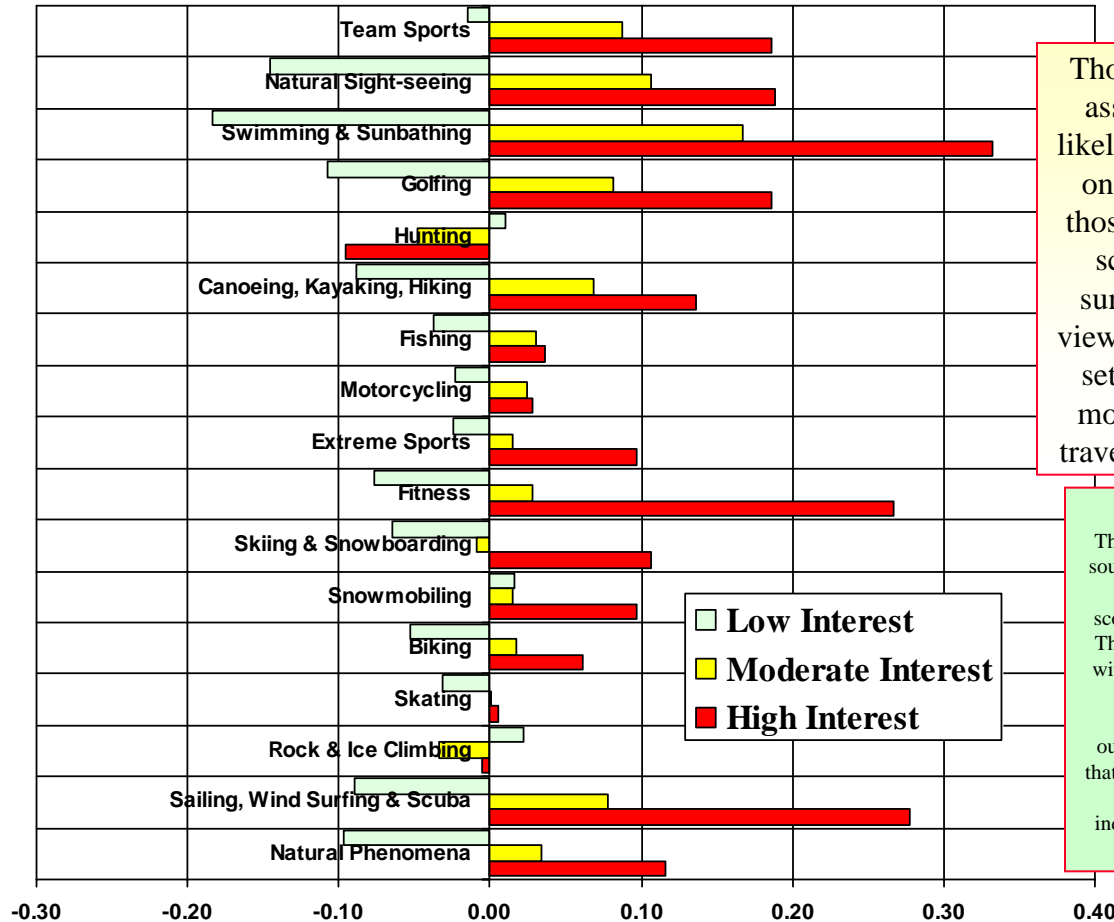
Those who exhibit an interest in vacation activities associated with cuisine and wine were considerably more likely to have sought out vacation experiences associated with exploration (e.g., visiting historical sites, natural wonders), personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as night life) and romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). Advertising and promotional materials designed to promote cuisine and wine products should emphasize the cultural, entertainment and romantic images of the destination specifically targeted at affluent couples, and to a certain extent, affluent singles. There should be a hedonistic quality to such promotions.

Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



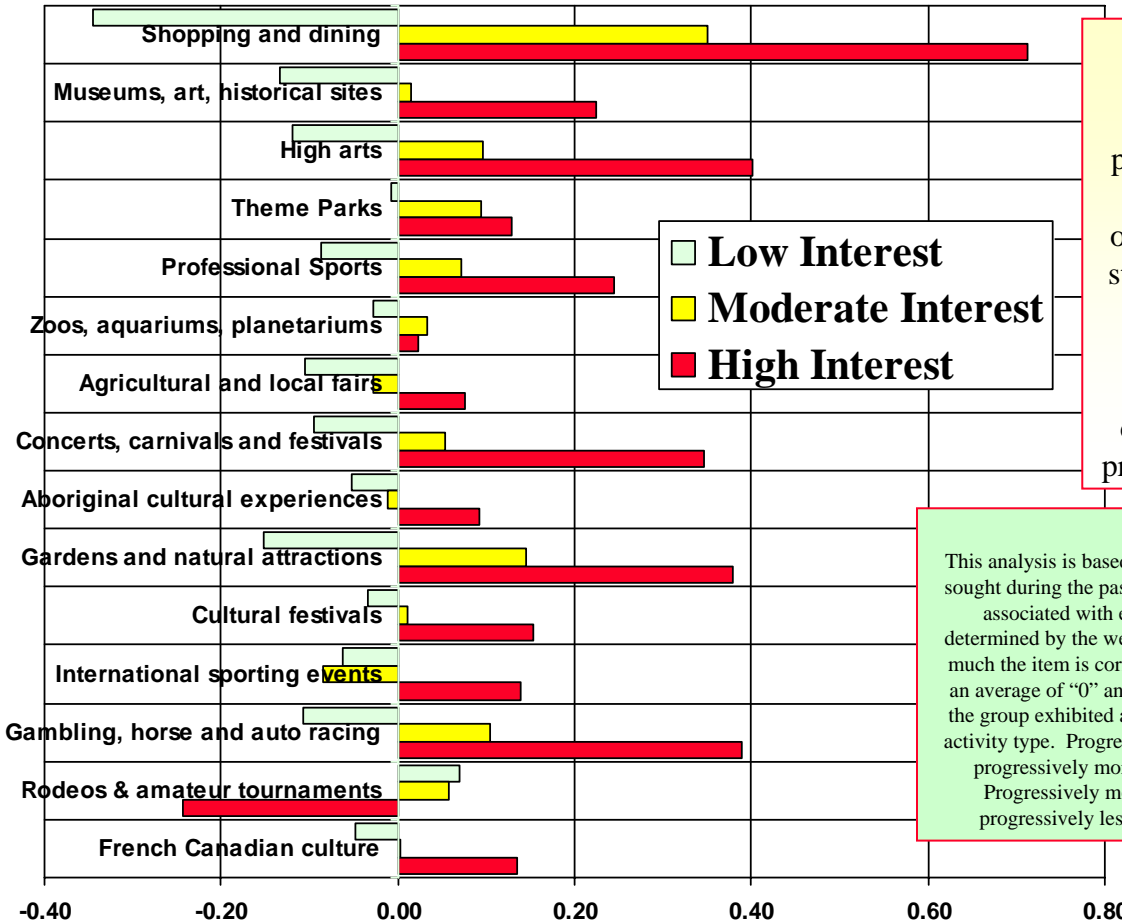
Those who exhibit an interest in vacation activities associated with cuisine and wine were also more likely to have participated in outdoor activities while on a trip. This association is especially strong for those who participated in water sports (e.g., sailing, scuba diving), fitness activities, swimming and sunbathing, team sports, natural sightseeing (e.g., viewing wildflower & flora, going on picnics in park settings) and golfing. These sorts of activities are more likely to be undertaken by the more affluent travelers and especially affluent couples and singles.

Technical Note
This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given outdoor vacation activity type. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the outdoor vacation activity type. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the outdoor vacation activity type.

Low Interest
 Moderate Interest
 High Interest

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

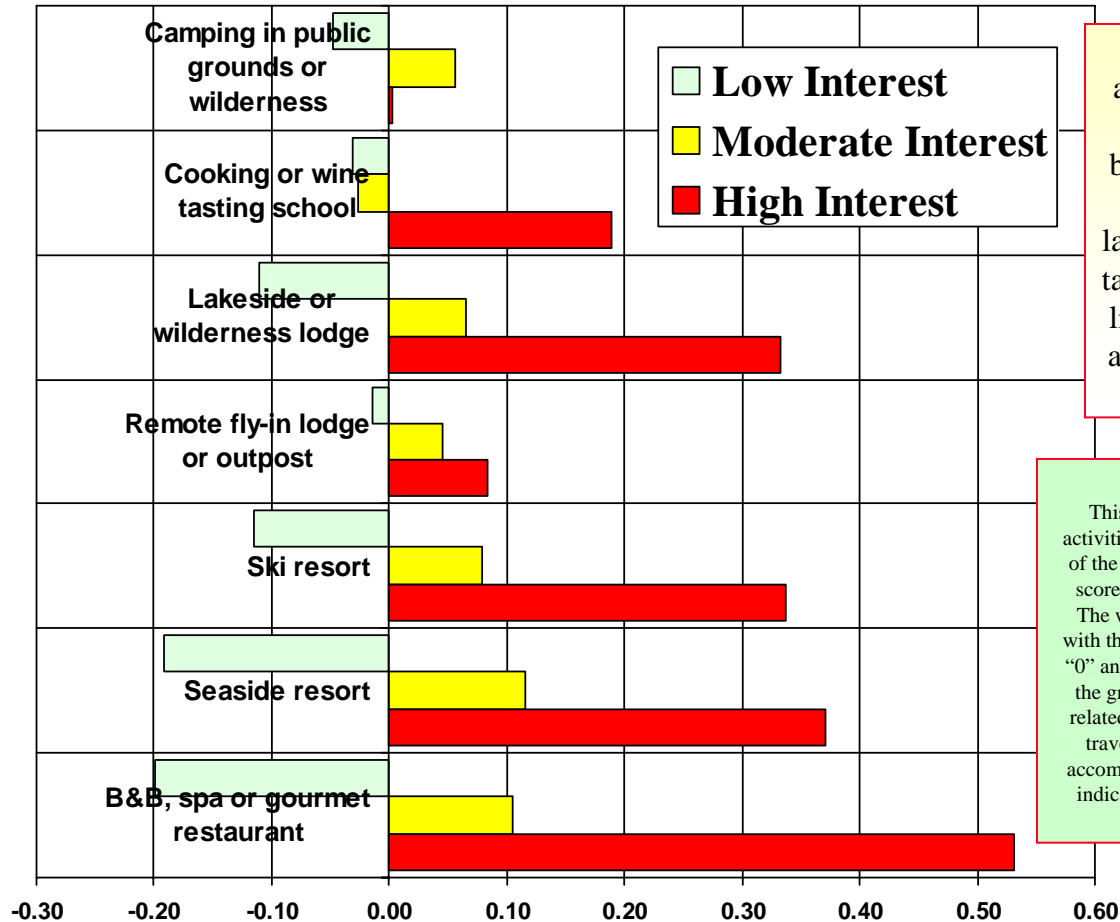


There is a stronger association between an interest in vacation activities associated with cuisine and wine and the likelihood of participation in most cultural and entertainment activities while on a trip than is observed for outdoor activities. This association is especially strong for those who shopped or dined, attended a high art performance (e.g., ballet, opera), attended a concert, carnival or fairs visited a botanical garden or visited a casino. These cultural and entertainment activities should be promoted in cuisine and wine vacation packages.

Technical Note
 This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given culture an entertainment vacation activity type. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the cultural and entertainment activity type. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the cultural and entertainment activity type.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

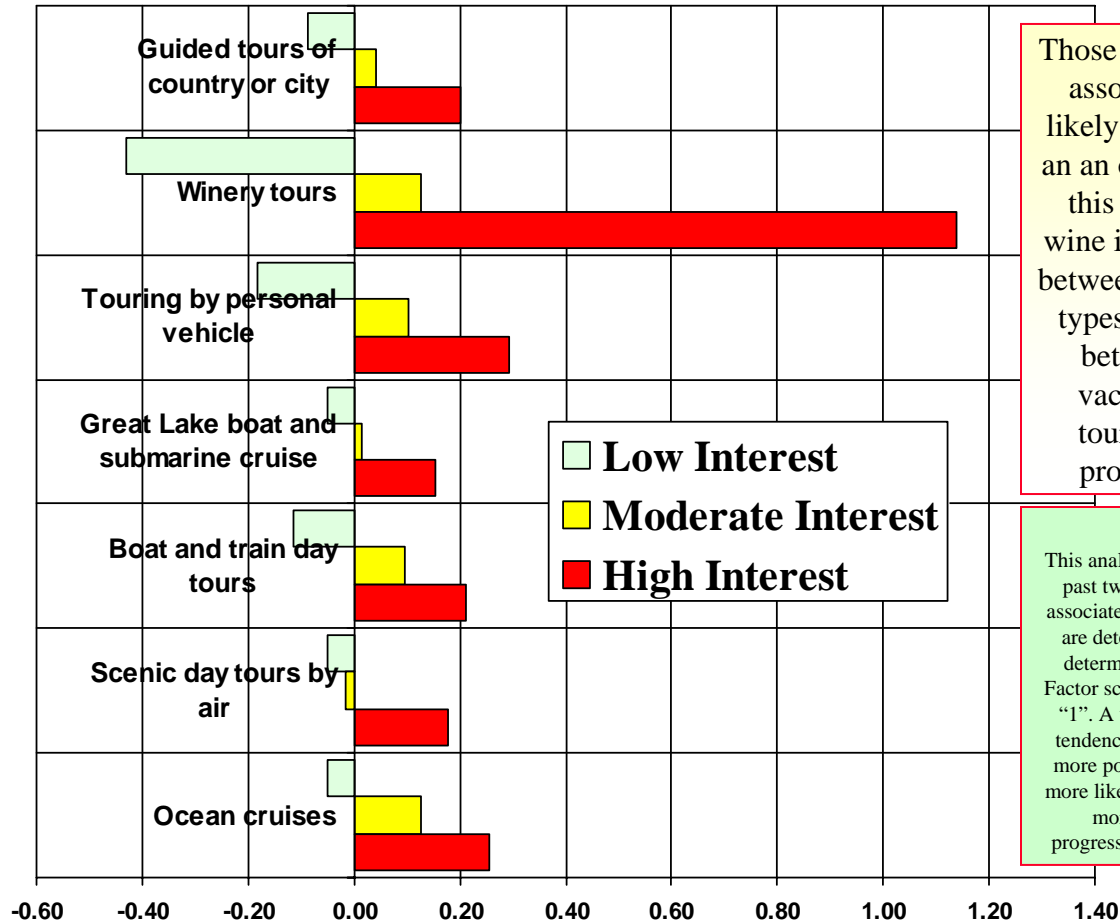


Those who exhibited an interest in vacation activities associated with cuisine and wine were also more likely to have stayed in a bed and breakfast, health spa or gourmet restaurant (with accommodations), a ski or seaside resort, a lakeside or wilderness lodge or a cooking or wine tasting school (with accommodations). There was little association between an interest in activities associated with wine and cuisine and camping in a public camp grounds or the wilderness.

Technical Note
 This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given accommodation-related vacation activity. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the accommodation-related vacation activity. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the accommodation-related vacation activity.

Day & Overnight Touring Activities in the Past 2 Years By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

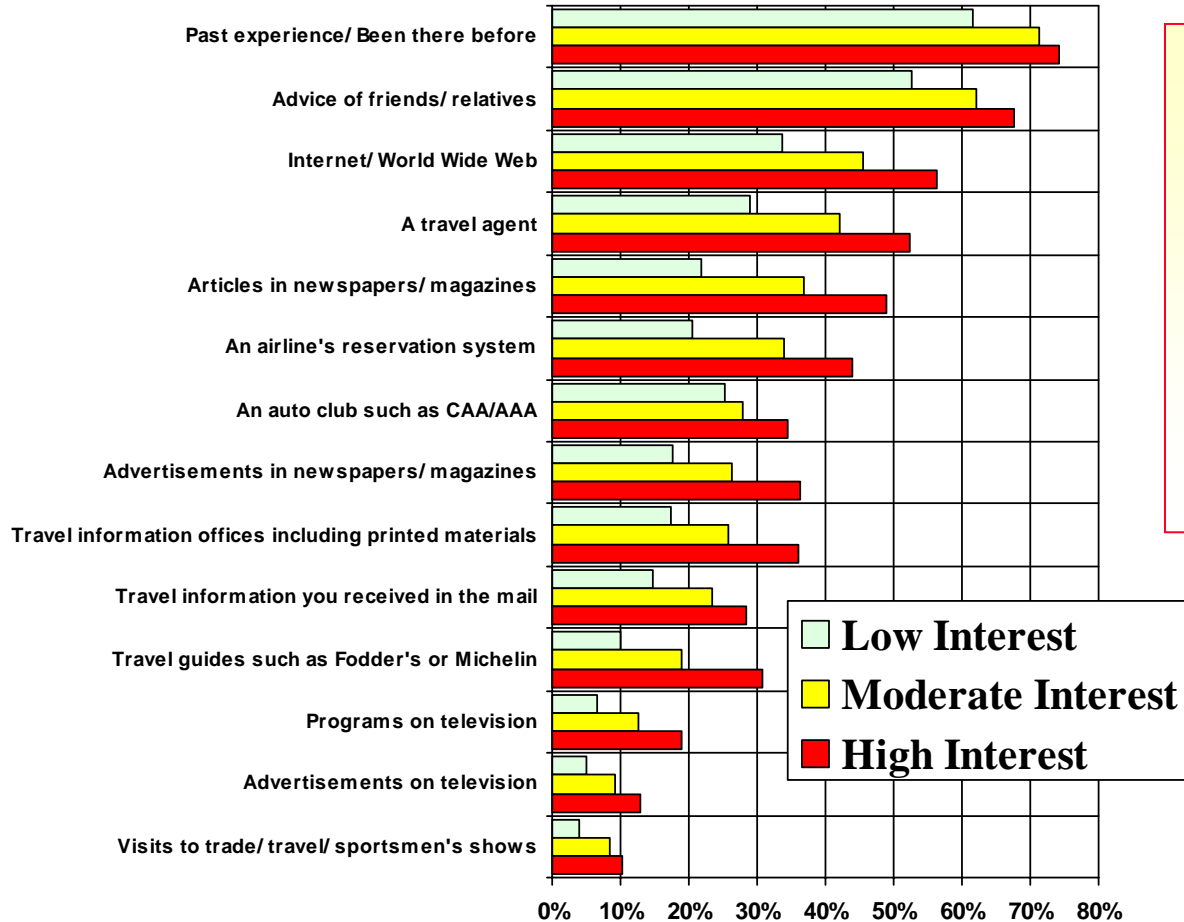


Those who exhibited an interest in vacation activities associated with cuisine and wine were also more likely to have toured a winery either on a day trip or an overnight tour of a wine region (Note: Items in this factor were used to construct the cuisine and wine interest index). There is also a mild association between interest in activities associated with all other types of touring activities. Overall, the association between an interest in cuisine and wine related vacation activities and touring (other than wine tours) is weak and should not be featured when promoting these types of vacation experiences.

Technical Note
This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to have participated in a given type of touring activity. Progressively more positive values indicate that the travelers in the group were progressively more likely to have participated in a given type of touring activity. Progressively more negative values indicate that the travelers within the group were progressively less likely to have participated in a given type of touring activity.

Sources of Information Consulted to Plan Brief Vacations By Interest in Wine and Cuisine

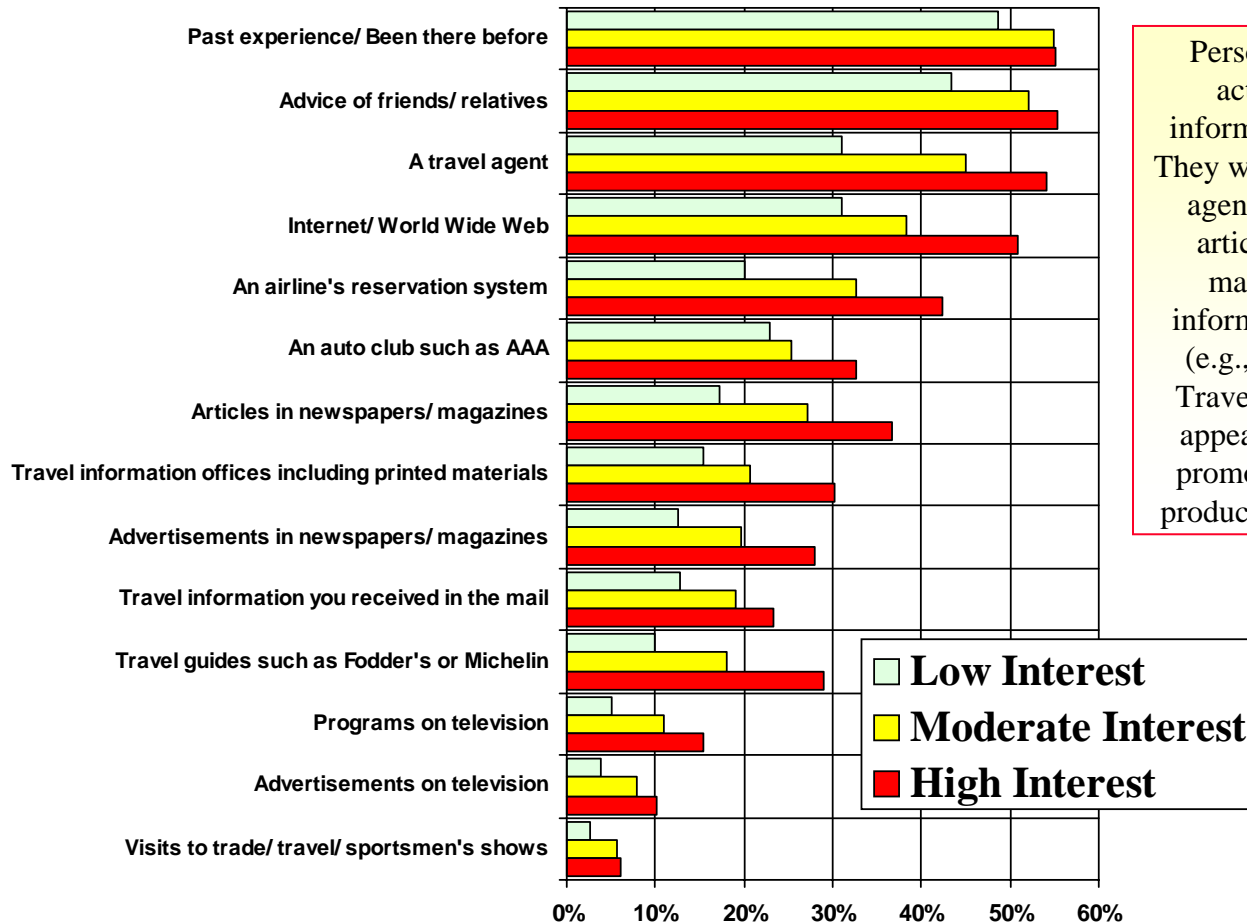
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Those who exhibited an interest in vacation activities associated with cuisine and wine tended to have consulted a larger number of information sources to plan their brief vacations. They were especially likely to have used the Internet, articles and advertisements in newspapers and magazines, travel information offices and travel guides (e.g., Fodor's) to help plan their brief vacations. Print media and the Internet would appear to be more efficient channels by which to promote cuisine and wine related brief vacation products than television, direct mail or automotive associations.

Sources of Information Consulted to Plan Longer Vacations By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



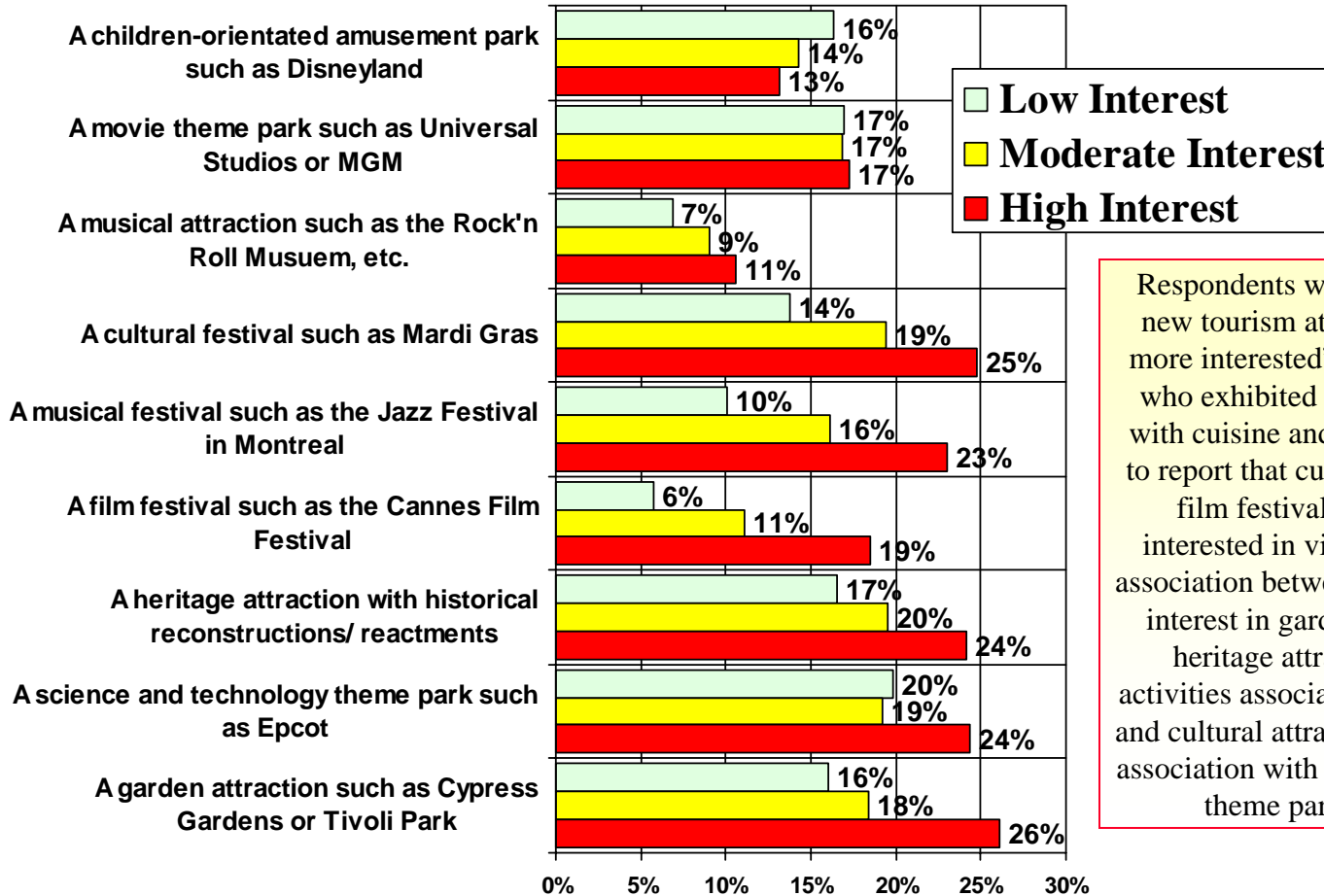
Persons interested in cuisine and wine vacation activities also consulted a larger number of information sources to plan their longer vacations. They were especially more likely to have used travel agents, the Internet, airline reservation systems, articles and advertisements in newspapers and magazines, travel information offices, travel information received in the mail and travel guides (e.g., Fodor's) to help plan their longer vacations. Travel agents, print media and the Internet would appear to be more efficient channels by which to promote cuisine and wine related longer vacation products than television or automotive associations.

Interest in New Tourism Products

By Interest in Wine and Cuisine (Part One of Two)

Percent Stating Attraction Would Make Them “A Lot More Interested” in Taking a Trip to Ontario

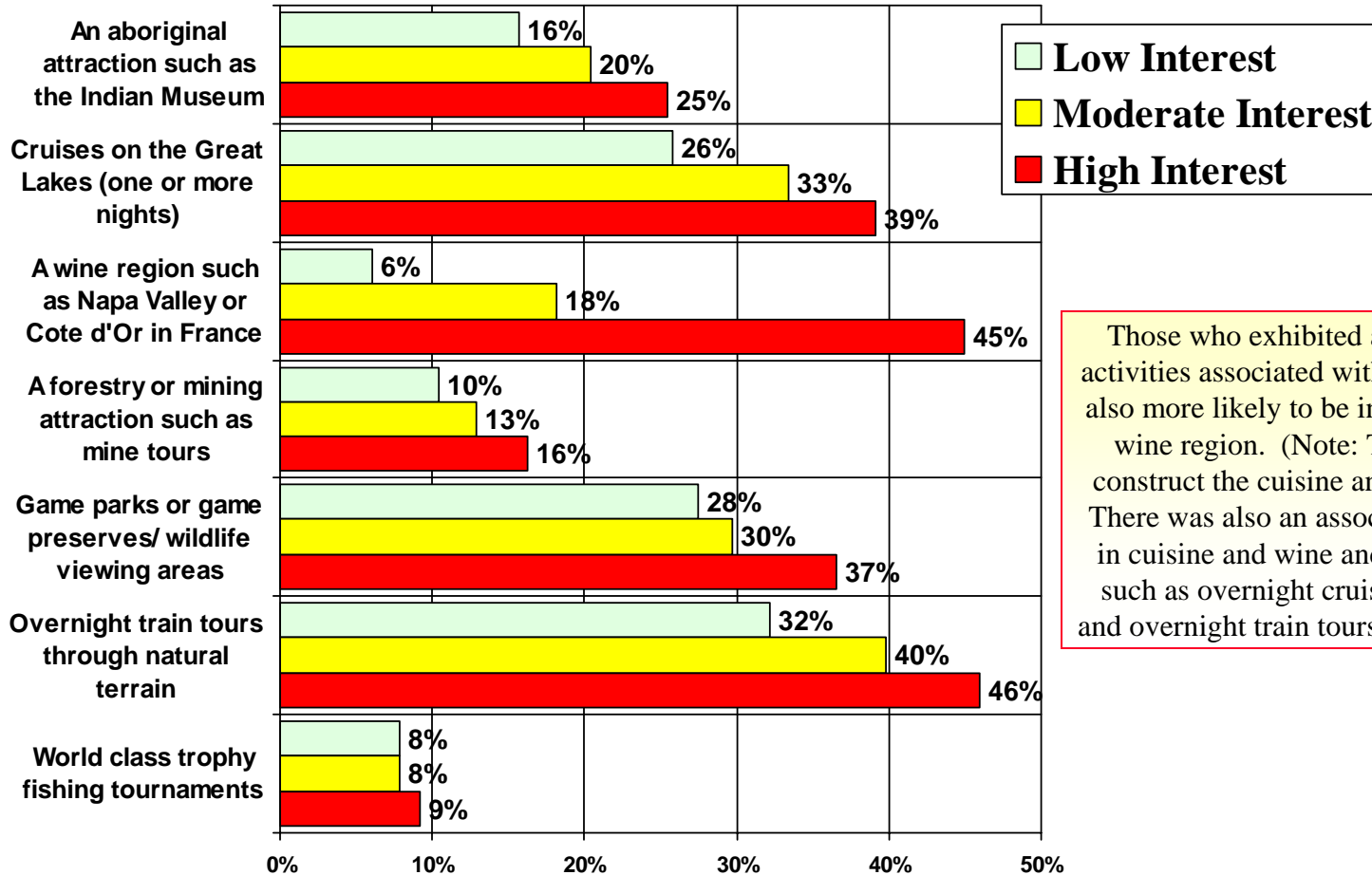
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Respondents were asked whether each of sixteen new tourism attractions would make them “a lot more interested” in taking a trip to Ontario. Those who exhibited an interest in activities associated with cuisine and wine were especially more likely to report that cultural festivals, music festivals and film festivals would make them a lot more interested in visiting Ontario. There was also an association between interest in cuisine and wine and interest in garden attractions, music attractions, heritage attractions and interest in vacation activities associated with cuisine and wine. Musical and cultural attractions and events exhibit a stronger association with an interest in cuisine and wine than theme parks and historical attractions.

Interest in New Tourism Products By Interest in Wine and Cuisine (Part One of Two)

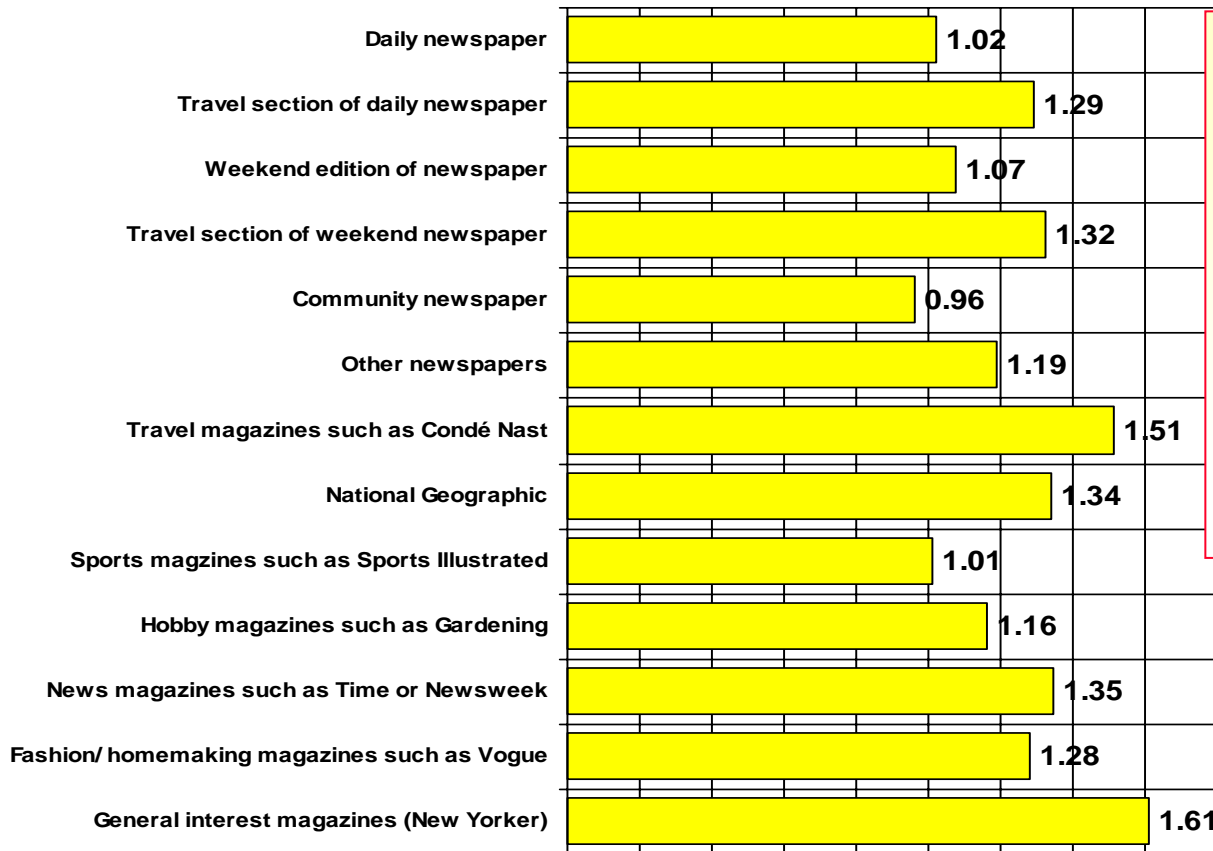
Percent Stating Attraction Would Make Them “A Lot More Interested” in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Those who exhibited an interest in vacation activities associated with cuisine and wine were also more likely to be interested in areas with a wine region. (Note: This item was used to construct the cuisine and wine interest index). There was also an association between interest in cuisine and wine and interest in attractions such as overnight cruises on the Great Lakes and overnight train tours through natural terrain.

Media Index for Print Media: Canada & United States By High Interest in Wine and Cuisine

Percent Reading Each Publication Type Among Those With High Interest in Wine and Cuisine By Percent Reading Each Type of Publication in General Market
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



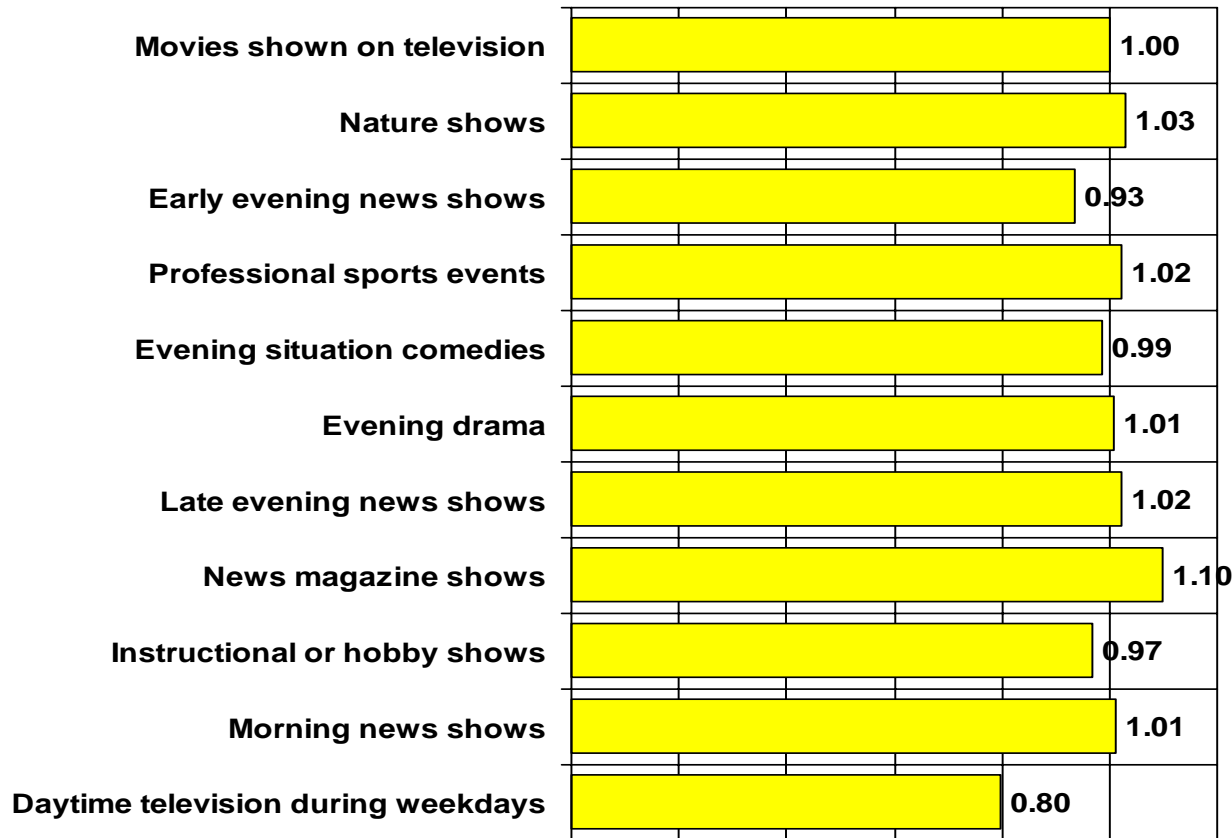
Media indexing for types of print media (see Technical Note below) suggests that General Interest Magazines (e.g., New Yorker or Harper's) and Travel Magazines (e.g., Travel and Leisure) are the most efficient methods by which to reach individuals who are interested in cuisine and wine related vacation activities. Such individuals are also likely to read the travel section of their newspaper, Canadian or National Geographic, news magazines (e.g., Times, Macleans) and Fashion or homemaking magazines such as Chatelaine, Vogue or Women's Day.

Technical Note
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in cuisine and wine were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programs: Canada & United States By High Interest in Wine and Cuisine

Percent Watching Each Type of Television Program Among Those With High Interest in Wine and Cuisine By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



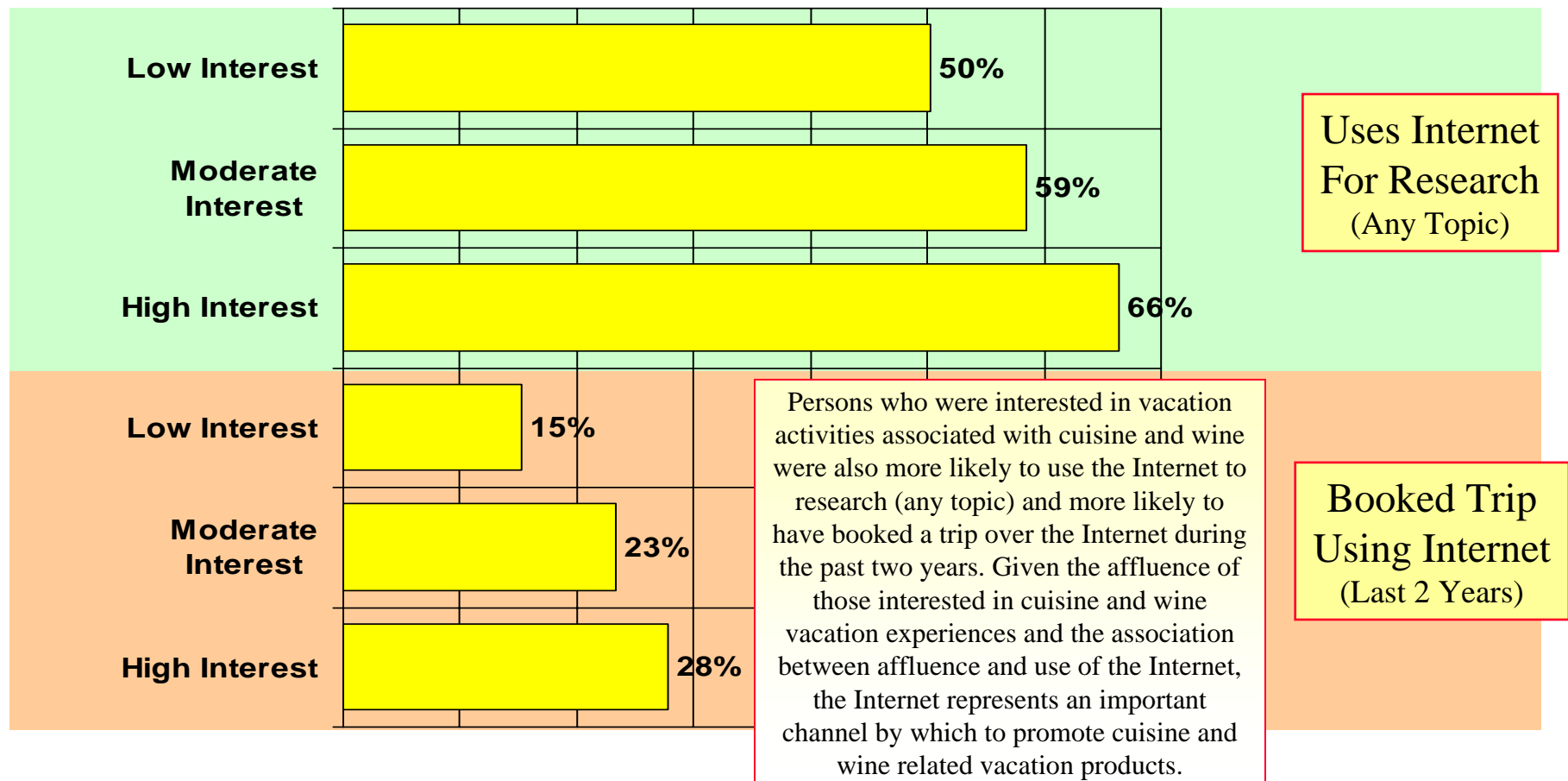
Those interested in vacation activities associated with wine and cuisine were more likely to watch news magazine programming and less likely to watch daytime television. Beyond this there is little association between television viewer preferences and interest in vacation activities associated with cuisine and wine. Overall, television is not recommended for these sorts of promotional activities.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in cuisine and wine were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Destination Image Mapping

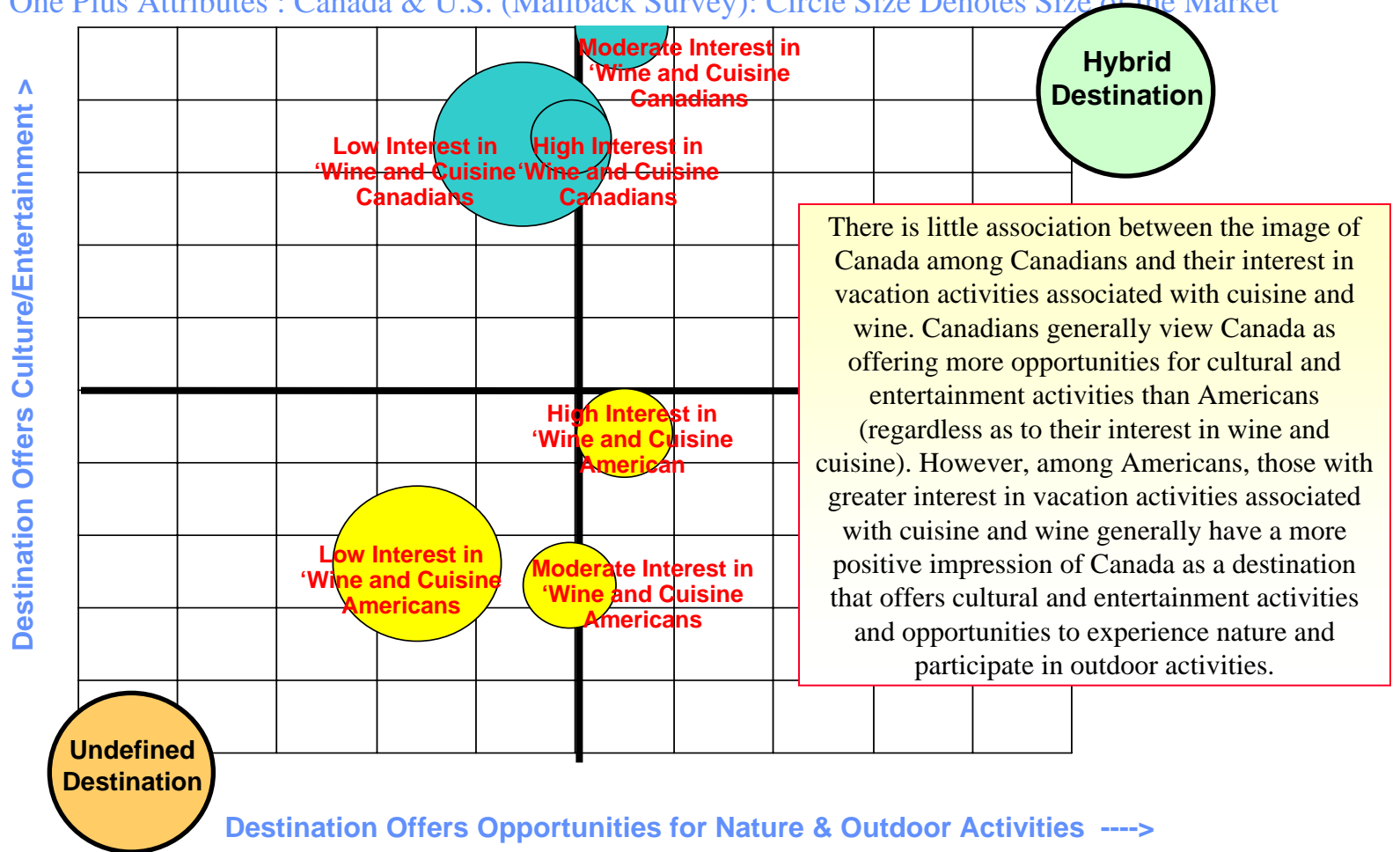
- Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a ten point rating scale for 25 image attributes. These ratings were factor analyzed to identify the general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellence opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.



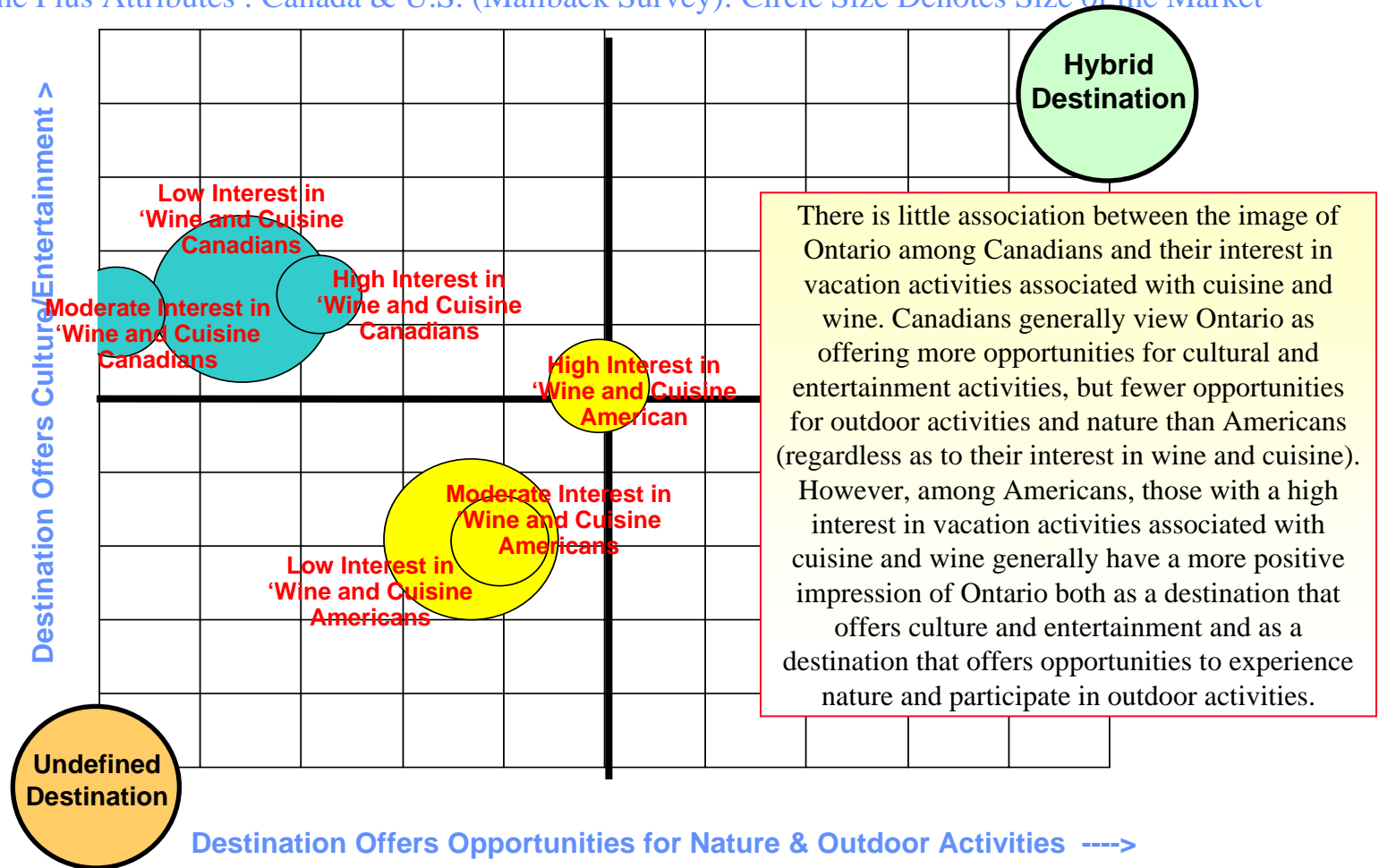
Canadian Vacation Imagery By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market



Ontario Vacation Imagery By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market

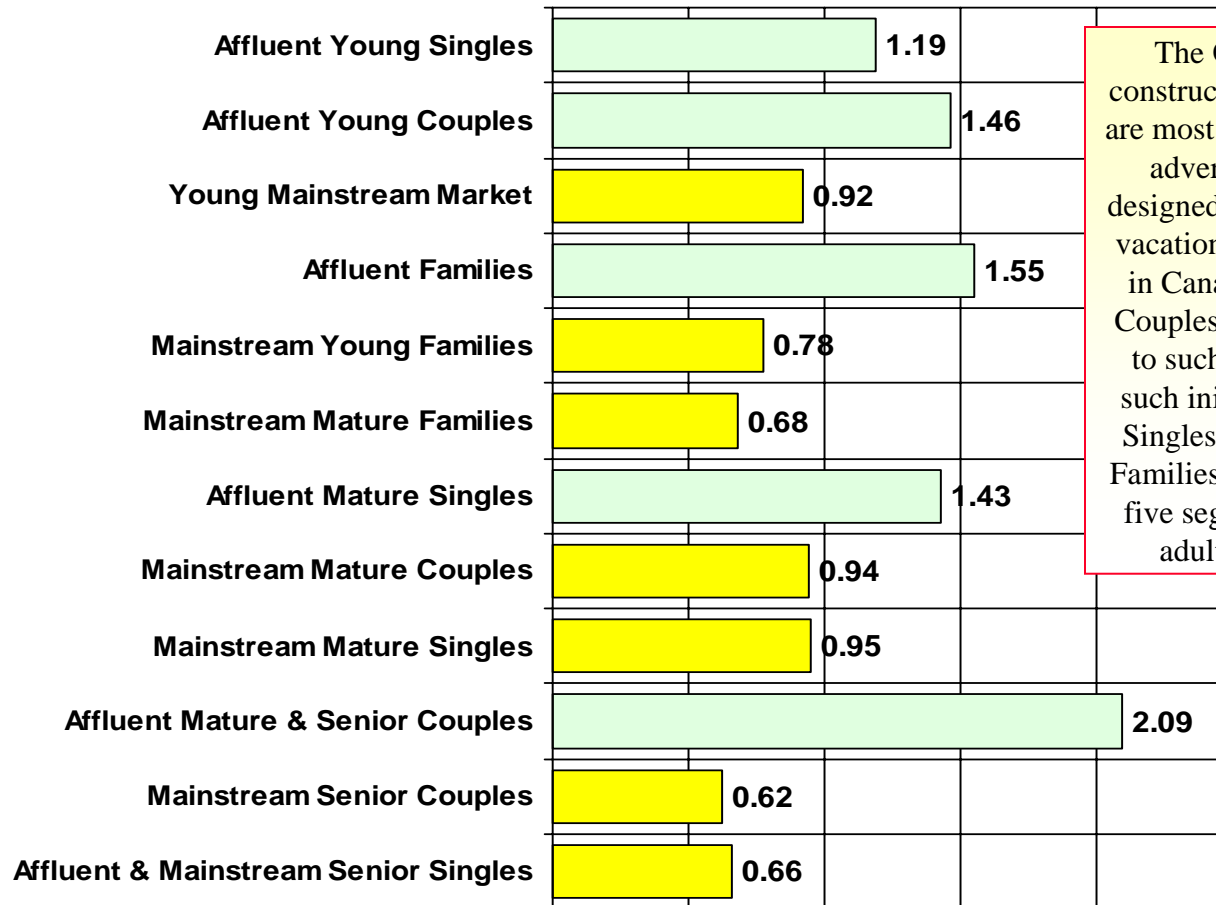


Overall Market Potential

Interest in Wine and Cuisine:Canada

Interest in Wine and Cuisine By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote cuisine and wine related vacation activities. This Index indicates that in Canada the Affluent Mature and Senior Couples are the most likely to be responsive to such initiatives. Secondary markets for such initiatives include the Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature Singles. These five segments represent 24.5 % of the total adult (18 plus) population in Canada.

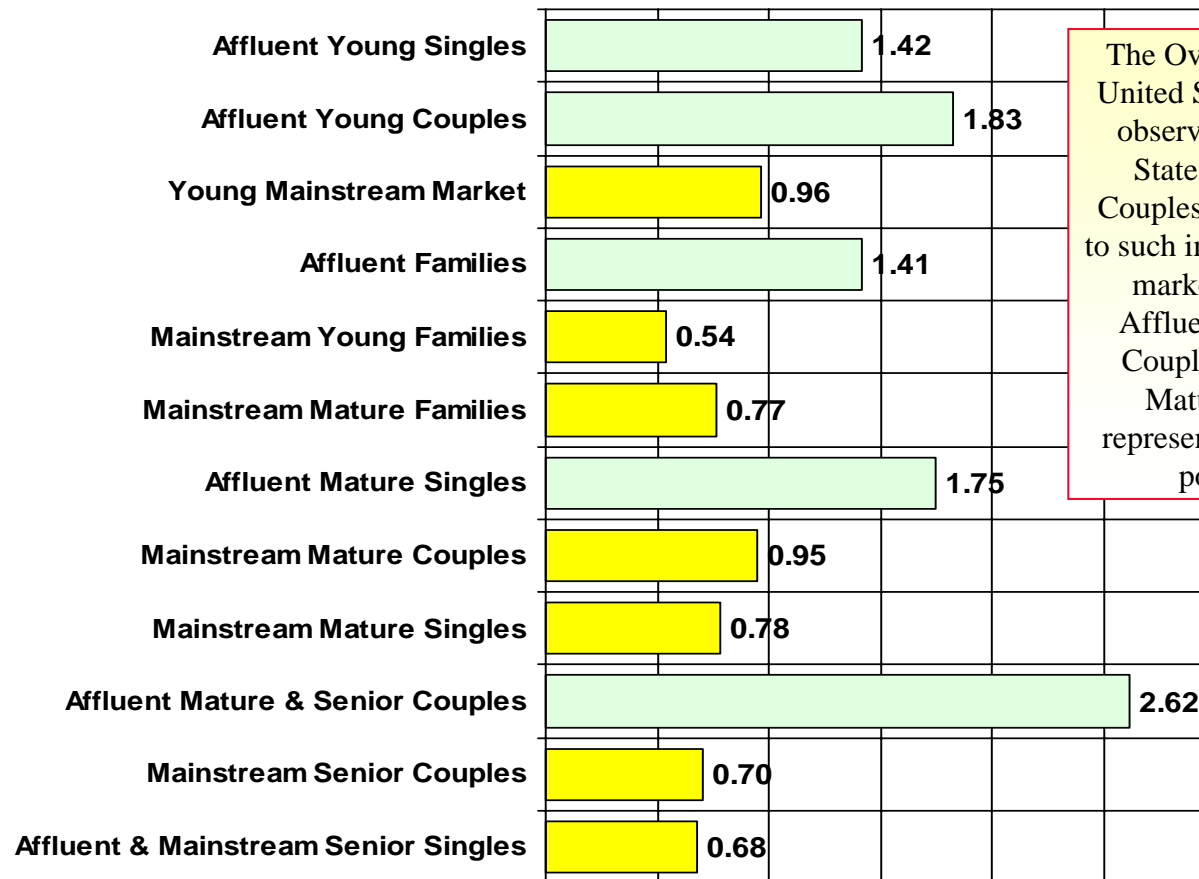
Technical Note
 The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in cuisine and wine related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

Interest in Wine and Cuisine: United States

Interest in Wine and Cuisine By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The Overall Market Potential Index for the United States shows the same pattern as that observed for Canada. Thus, in the United States, the Affluent Mature and Senior Couples are the most likely to be responsive to such initiatives. As with Canada, secondary markets for such initiatives include the Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature Singles. These five segments represent 27.3 % of the total adult (18 plus) population in the United States.

Technical Note
 The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in cuisine and wine related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.