

Interest in Wine and Cuisine

A Market Segment Analysis Based on
the Travel Activities and Motivations Survey (TAMS 2006)

The Canadian Market

August 2007



TABLE OF CONTENTS

EXECUTIVE SUMMARY	2
INTRODUCTION	4
THE CANADA MARKET	6
Wine and Cuisine Associated Activities	6
Wine and Cuisine Market Incidence.....	8
Market Incidence by Canadian Provinces.....	10
Market Incidence by Canadian Major Cities.....	11
Demographic Profiles.....	12
Vacation Destinations Visited.....	13
Destination Appeal Ratings.....	14
Benefits Sought from Vacation Travel.....	15
Considerations When Choosing a Travel Destination.....	16
Activity Participation During Trips	17
Accommodation Type Used While on Trip.....	19
Tour and Cruises Taken While on Trip	20
Trip Planning.....	21
Media Consumption Habits	24
Membership in Organizations and Programs.....	25
Appendix A: Factor Analysis of Outdoor Activities Engaged in While on Trips.....	26
Appendix B: Factor Analysis of Culture and Entertainment Activities Engaged in While on Trips	27

EXECUTIVE SUMMARY

Pursuing activities associated with wine and cuisine was one of the most important travel experiences that Canadian travellers sought while on trips. In 2004 and 2005, 15.4 million Canadians participated in at least one type of activity associated with wine and cuisine while on an out-of-town overnight trip. This represents 74% of all adult Canadian travellers. Of those wine and cuisine participants, 16% (or 2.5 million) reported that participating in such activities was a trip motivator (main reason) for taking at least one trip. Dining in restaurants offering local ingredients and recipes and going to local outdoor cafés were the most common types of wine and cuisine-related activities.

Fifteen types of wine and cuisine activities, as shown in the table below, were included in the analysis. Depending on the degree to which travellers engaged in such activities, this report groups the Canadian travellers into three segments: high interest, moderate interest, and low (or no) interest.

Wine and Cuisine-related Activities	
Visited wineries for day visits & tasting	Aboriginal cuisine (tasted or sampled)
Visited breweries for day visits & tasting	Dining - local ingredients and recipes
Stayed at a wine tasting school	Dining - high-end international reputation
Stayed at a Country Inn with gourmet restaurant	Dining - other high-end restaurants
Same-day tour to winery/wineries	Dining at a farm
	Went to local outdoor cafes
Attended food/drink festivals	Visited food processing plants
Participated in cooking/wine tasting courses	Stayed at a cooking school

37% (or 7.7 million) of Canadian travellers were Wine and Cuisine Enthusiasts, exhibiting either moderate or high interest in wine and cuisine-associated activities while on trip in the past two years.

Wine and Cuisine Enthusiasts were more likely to be from larger urban areas with more affluent populations. Interest in wine and cuisine-related activities was highest in British Columbia, followed by Quebec, Alberta, and Ontario. Relative to other provinces, Atlantic Provinces exhibited the lowest interest in wine and cuisine-related activities.

There were strong associations between interest in wine and cuisine and levels of education and household income. Travellers holding a university degree and having household income over \$80,000 were more likely to be interested in wine and cuisine.

Mature (35-64 years old) couples and families (those with kids) were more likely to be interested in wine and cuisine-related activities. Young couples (less than 35 years old) and senior couples (over 64 years old), though to a lesser extent, were also actively engaged in activities associated with wine and cuisine.

Wine and Cuisine Enthusiasts were frequent travellers, taking an average of 4.1 trips between 2004 and 2005 versus 3.2 trips for other Canadian travellers. Compared to other travellers, Wine and Cuisine Enthusiasts on average took more vacations in Canada, and substantially more vacations to U.S. and overseas countries.

Similar to other travellers, Wine and cuisine Enthusiasts travelled to relax and relieve stress, to get a break from their day-to-day environment, and to create lasting memories. However, they were considerably more likely to seek out vacation experiences that would allow them to enrich their perspective on life, to gain knowledge of history and different cultures, and to stimulate their mind.

Wine and Cuisine Enthusiasts were very active while on trips in 2004 or 2005. They were considerably more likely than other travellers to participate in a variety of activities associated with outdoor, cultural and entertainment experiences. They were particularly interested in such outdoor activities as fitness exercises, cycling as a same-day excursion, cross-country skiing, snowshoeing, and wildlife viewing. They were also more like to have participated in or sought out activities related to agri-tourism, historic sites, museums and art galleries, and high art performances.

Relative to other travellers, Wine and Cuisine Enthusiasts had a higher tendency to consult a large number of information sources when they were planning trips. Using the internet (78%), taking advices from friends and relatives (61%), and considering their own past experiences (58%) were the most popular information sources. They were also more likely to read the travel section of daily and weekend newspapers than other Canadian travellers.

INTRODUCTION

The TAMS survey examines the recreational activities and travel habits of adult Canadians and Americans (18 years or older). The survey examines out-of-town, travel behaviour of one or more nights over a two-year period and provides detailed information on Travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics and media consumption patterns.

TAMS represents a comprehensive assessment of travel behaviour and motivators and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets;
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Ontario;
- Create packaging opportunities for each of these markets;
- Determine how to reach these markets (i.e. in terms of communication strategies); and
- Provide information on how to better fine-tune and target existing marketing campaigns.

TAMS was sponsored by the following organizations:

Ontario Ministry of Tourism
Ontario Tourism Marketing Partnership
Canadian Tourism Commission
Atlantic Canada Opportunities Agency
Department of Canadian Heritage
Parks Canada
Statistics Canada

Quebec Ministry of Tourism
Tourism Manitoba
Tourism Saskatchewan
Alberta Economic Development
Tourism BC
Government of Yukon
Government of Northwest Territories

The survey was conducted in Canada and the United States between January and June 2006 and it surveyed adults 18 years and over. The reference period for the data is 2004 and 2005.

The Canadian survey consisted of a telephone and a mail back survey:

- The household response rate on the telephone was 65.4%
- The paper questionnaire response rate was 53.5%
- The Canadian database consists of 53,150 completed records from the telephone survey and 24,692 completed paper questionnaires

The U.S. TAMS consisted only of a mail back survey as it used an existing panel

- The panel's response rate for this survey was 71.3%
- The U.S. database consists of 60,649 completed responses

This report examines the interest of Canadian travellers in activities associated with wine and cuisine. The focus is on the differences between Canadian travellers who exhibited an interest in wine and cuisine-related activities and those who did not with respect to their demographic profiles, travel patterns, vacation activities participated, media consumption habits, vacation planning process, and the like.

For this report, the sample sizes of the various activities which make up the wine and cuisine segment are shown in the table below. The sample was weighted with population, age and education, to represent the overall population under study. All numbers included in the report represent weighted data.

Sample Size for Each Activity	
	Number of Respondents
Wine and Cuisine Activities (Net)	18,160
Wine (All Activities)	5,844
Visited wineries for day visits & tasting	4,218
Visited breweries for day visits & tasting	1,349
Stayed at a wine tasting school	66
Stayed at a Country Inn with gourmet restaurant	1,110
Same-day tour to winery/wineries	1,839
Cuisine Activities (Net)	17,573
Aboriginal cuisine (tasted or sampled)	779
Dining - local ingredients and recipes	13,739
Dining - high-end international reputation	4,181
Dining - other high-end restaurants	6,631
Dining at a farm	1,318
Went to local outdoor cafes	9,606
Visited food processing plants	1,539
Stayed at a cooking school	97
Wine/Cuisine Combined (Net)	2,014
Attended food/drink festivals	1,389
Participated in cooking/wine tasting courses	891

Construction of the Wine and Cuisine Interest Index: The responses to the 15 activities which make up the wine and cuisine segment were factor analyzed to construct the overall Wine and Cuisine Interest Index. Factor scores were computed and respondents were classified into three groups:

- Low Interest: Below average participation or interest in the 15 wine and cuisine-related activities
- Moderate Interest: Average participation and interest in the 15 wine and cuisine-related activities
- High Interest: Significantly above average participation and interest in the 15 wine and cuisine-related activities

THE CANADA MARKET

Wine and Cuisine Associated Activities

Table 1: Canadian travellers who engage in wine and cuisine associated activities			
	Number of travellers engaging in activity (000s)	% of Total Canadian Travellers	% Main Reason for Trip*
Total Number (000s)	15,390	20,875	2,520
Wine and Cuisine Activities (Net)	15,390	74%	16%
Wine (All Activities)	4,875	23%	19%
Visited wineries for day visits & tasting	3,349	16%	18%
Visited breweries for day visits & tasting	1,215	6%	12%
Stayed at a wine tasting school	68	0%	0%
Stayed at a Country Inn with gourmet restaurant	1,010	5%	33%
Same-day tour to winery/wineries	1,440	7%	n/a
Cuisine Activities (Net)	14,844	71%	12%
Aboriginal cuisine (tasted or sampled)	666	3%	18%
Dining - local ingredients and recipes	11,650	56%	10%
Dining - high-end international reputation	3,533	17%	12%
Dining - other high-end restaurants	5,524	26%	11%
Dining at a farm	1,021	5%	16%
Went to local outdoor cafes	7,875	38%	7%
Visited food processing plants	1,322	6%	13%
Stayed at a cooking school	73	0%	0%
Wine/Cuisine Combined (Net)	1,618	8%	25%
Attended food/drink festivals	1,108	5%	24%
Participated in cooking/wine tasting courses	722	3%	23%

*% of travellers who had participated in the specific wine/cuisine activity/experience who reported the activity was the main reason for taking at least one trip

- 74% of adult Canadian travellers, or 15.4 million, engaged in at least one wine and cuisine-related activities while on an overnight trip in 2004 or 2005.
 - 4.9 million pursued wine related activities
 - 14.8 million pursued cuisine activities
 - 1.6 million attended food/drink festivals or took cooking/wine tasting courses
- Dining at ingredients offering local ingredients and recipes, going to local outdoor cafes, and dining at other high-end restaurants were the most popular activities associated within the wine and cuisine set.

- Although a majority of travellers engaged in wine and cuisine associated activities while on trips, only 16% (or 2.5 million) of those reported that these activities were the main reason for taking at least one of their trips.
- Higher incidences of reporting these activities as the main reason for taking at least one overnight trip were observed among Canadians who:
 - Stayed at a country inn with gourmet restaurant (33%)
 - Attended food/drink festivals (24%)
 - Participated in cooking/wine tasting courses (23%)
 - Went to wineries for day visits & tasting (18%)
 - Tasted or sampled aboriginal cuisine (18%)
 - Went to dine at a farm (16%), or
 - visited food processing plants (13%)

Wine and Cuisine Market Incidence

Table 2: Interest in Wine and Cuisine			
	High Interest	Moderate Interest	Low or No Interest
Size of Market (000s)	2,874	4,871	13,130
As % of Total Canadian Travellers	14%	23%	63%
Visited wineries for day visits & tasting	66%	26%	1%
Visited breweries for day visits & tasting	29%	7%	0%
Stayed at a wine tasting school	2%	0%	0%
Stayed at a country inn with gourmet restaurant	23%	6%	0%
Same-day tour to winery/wineries	37%	7%	0%
Aboriginal cuisine (tasted or sampled)	13%	5%	0%
Dining - local ingredients and recipes	89%	78%	40%
Dining - high-end international reputation	55%	31%	3%
Dining - other high-end restaurants	63%	48%	10%
Dining at a farm	17%	7%	2%
Went to local outdoor cafes	85%	61%	19%
Visited food processing plants	28%	9%	0%
Stayed at a cooking school	2%	0%	0%
Attended food/drink festivals	23%	6%	1%
Participated in cooking/wine tasting course	22%	2%	0%
Average Number of Activities Pursued	5.5	2.9	0.9

- 37% (or 7.7 million) of adult Canadian travellers were Wine and Cuisine Enthusiasts, exhibiting either moderate or high interest in wine and cuisine related activities while on trip in the past two years. The remaining 63% of Canadian travellers had a low or no interest in wine and cuisine activities.
- Wine and Cuisine Enthusiasts were more likely to engage in a combination of various associated activities, with an average of 5.5 types of wine and cuisine activities. Those with moderate interest in wine and cuisine activities reported participating in an average of 2.9 activities.

As shown in Table 2, travellers with a moderate or high interest in wine and cuisine associated activities generally pursued more than one type of such activities while traveling. To understand which activities were normally pursued together, this analysis used a statistical approach called “cluster analysis”. The cluster analysis aimed to group similar respondents together. Three groups were generated as a result of this analysis (see Table 3).

Table 3: A combination of Wine and Cuisine Associated Activities Pursued

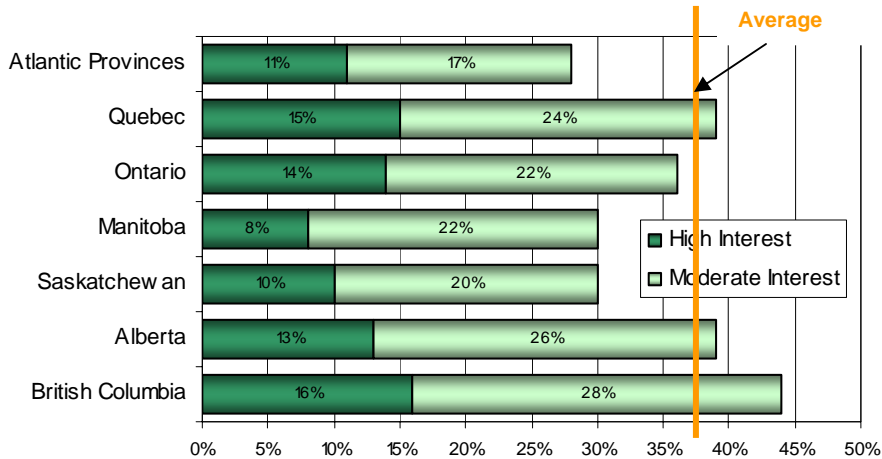
	Wine and Food Dabblers	Food Lovers	Wine and Food Lovers	Total Moderate or High Interest
Total Travellers (000s)	2,735	3,196	1,797	7,728
% as of Total of Wine and Cuisine Enthusiasts	35%	41%	23%	
Visited wineries for day visits & tasting	50%	0%	100%	41%
Visited breweries for day visits & tasting	19%	7%	24%	15%
Stayed in country inn with gourmet restaurant	10%	12%	17%	12%
Same-day tour to winery/wineries	22%	5%	36%	18%
Aboriginal cuisine (tasted or sampled)	11%	6%	8%	8%
Dining - local ingredients and recipes	81%	83%	82%	82%
Dining - high-end international reputation	4%	60%	60%	40%
Dining - other high-end restaurants	0%	82%	86%	54%
Dining at a farm	11%	8%	13%	10%
Went to local outdoor cafes	58%	77%	78%	70%
Visited food processing plants	21%	9%	22%	16%
Attended food/drink festivals	13%	9%	18%	13%
Participated in cooking/wine tasting course	8%	5%	19%	9%
Average Age	46.4	41.8	47.7	44.8
Average Household Income	74,660	79,979	90,298	80,609

- The first group of Wine and Cuisine Enthusiasts focused on dining in relatively inexpensive restaurants (offering local ingredients and recipes), although they, to a lesser extent, tended to go to local outdoor cafés and visit wineries for day visits and tasting. The members of this group were more likely to be seniors with relatively lower income and lower education levels.
- The second group consisted of travellers who were food lovers. They dined in various restaurants, including local outdoor cafés, but were least likely to participate in wine-related activities. The members of this group were more likely to be under 35, either singles or couples.
- The third group of Wine and Cuisine Enthusiasts were extreme food and wine lovers. They were more likely to pursue various types of wine and cuisine-related activities. A majority of them visited wineries and dined in both expensive and inexpensive restaurants (high-end and local), including local outdoor cafés. The members of this group were more likely to be mature travellers (45-64 years old) with higher income (over \$100, 000). This would be a prime target market for food and wine-related activities.

Market Incidence by Canadian Provinces

Chart 1: Market Incidence by Provinces

% of Travellers Who Took Overnight Trips between 2004 and 2005

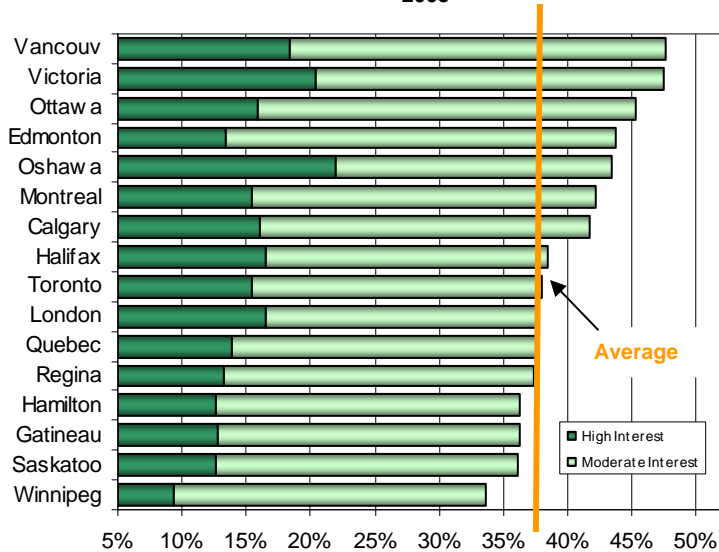


Market Size			
	High Interest	Moderate Interest	Total Wine & Cuisine Enthusiasts
Atlantic Provinces	161,636	249,779	411,414
Quebec	694,917	1,136,922	1,831,838
Ontario	1,147,118	1,810,242	2,957,360
Manitoba	53,472	148,400	201,872
Saskatchewan	60,916	125,726	186,643
Alberta	287,171	573,056	860,227
British Columbia	469,187	826,791	1,295,978

- Interest in wine and cuisine-related activities was highest in British Columbia (44%).
- Quebec and Alberta had an above average level of interest in wine and cuisine-related activities (39%).
- A slightly below average level of interest in wine and cuisine were observed in Ontario (36%), although it represents the largest number.
- Those provinces that tend to have smaller urban areas and less affluent population, such as Manitoba, Saskatchewan or Atlantic provinces, were least likely to be interested in wine and cuisine-related activities.

Market Incidence by Canadian Major Cities

Chart 2: Market Incidence by Major Cities
% of Travellers Who Took Overnight Trips in 2004 and 2005

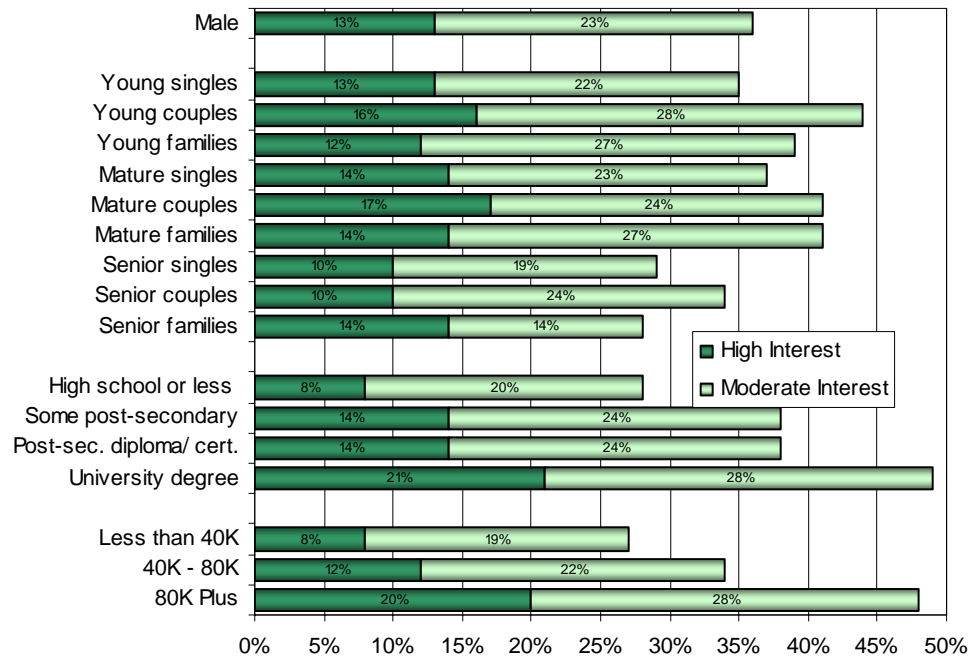


Market Size			
	High Interest	Moderate Interest	Total Wine and Cuisine Enthusiasts
Vancouver	287,691	458,807	746,498
Victoria	47,823	63,350	111,174
Ottawa	95,198	175,431	270,629
Edmonton	92,055	208,375	300,430
Montreal	370,310	640,304	1,010,614
Calgary	121,443	192,758	314,201
Halifax	41,541	55,475	97,016
Toronto	533,045	773,242	1,306,286
Kitchener	44,620	69,151	113,771
London	51,065	65,344	116,409
Quebec City	64,610	109,851	174,461
Regina	17,714	32,212	49,927
Hamilton	59,353	110,316	169,669
Gatineau	23,372	42,741	66,113
Saskatoon	19,850	37,019	56,869
Winnipeg	40,683	106,508	147,191

- Significantly higher-than-average levels of interest in wine and cuisine-related activities were observed for the major urban centres, which emerged as primary markets for such activities. Interest in wine and cuisine-related activities was highest in Vancouver (48%), followed by Victoria (47%), Ottawa (45%), Edmonton (44%), Montreal (42%) and Calgary (42%).
- Above average levels of interest in wine and cuisine-related activities were also observed in Halifax, Toronto, London or Quebec City.
- Relative to the residents of other Canadian cities, residents of Saskatoon and Winnipeg, were less likely to be interested in wine and cuisine-related activities.

Demographic Profiles

Chart 3: Demographic Profiles
% of Travellers Who Took Overnight Trips in 2004 and 2005

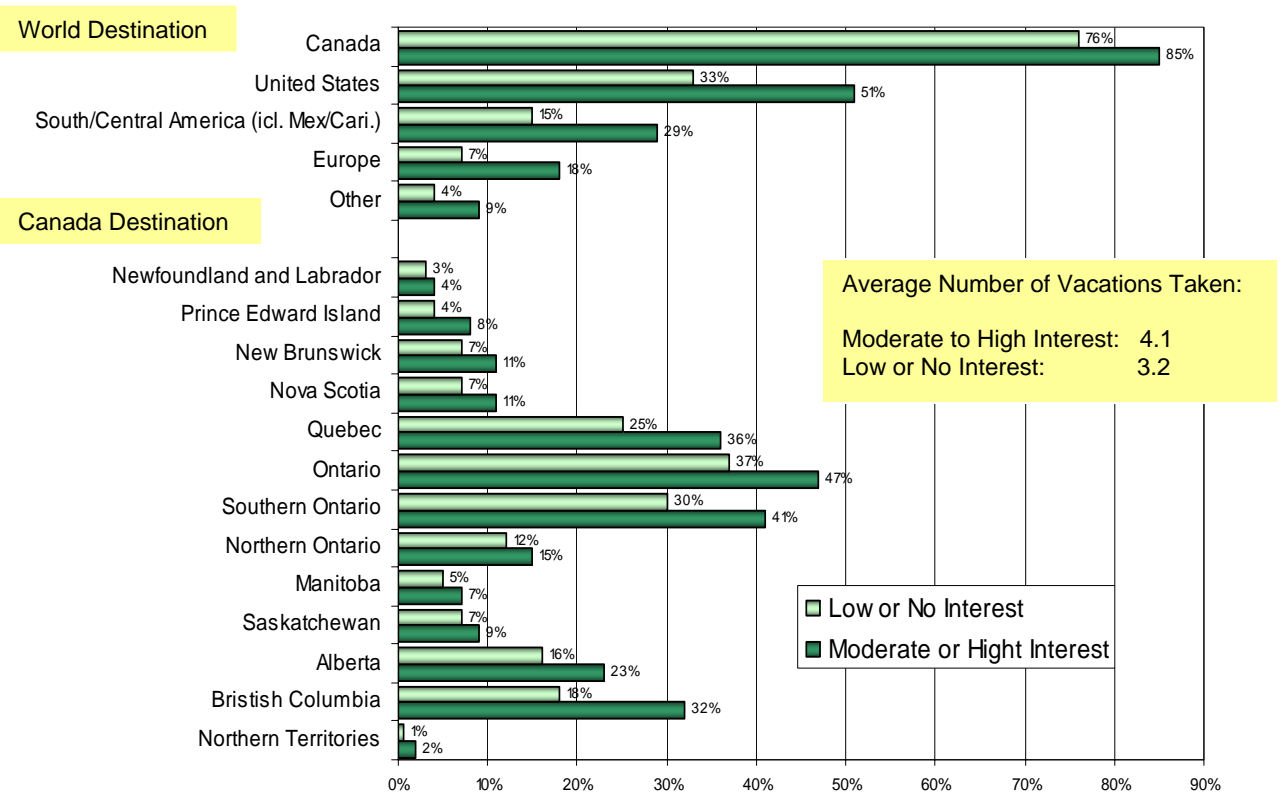


Note: young refers to 18-34 years olds, mature refers to 35-64 years olds, and senior refers to 65 or older.

- Couples and families, both young and mature, were the most likely to exhibit an interest in activities associated with wine and cuisine. Senior couples, though to a lesser extent, also exhibited an interest in wine and cuisine-related activities.
- Interest in activities related to wine and cuisine was strongly associated with levels of education and household income, increasing as the level of education and household income increased.
- In general, the more affluent, better educated and mature couples and families emerged as the primary market of such activities.

Vacation Destinations Visited

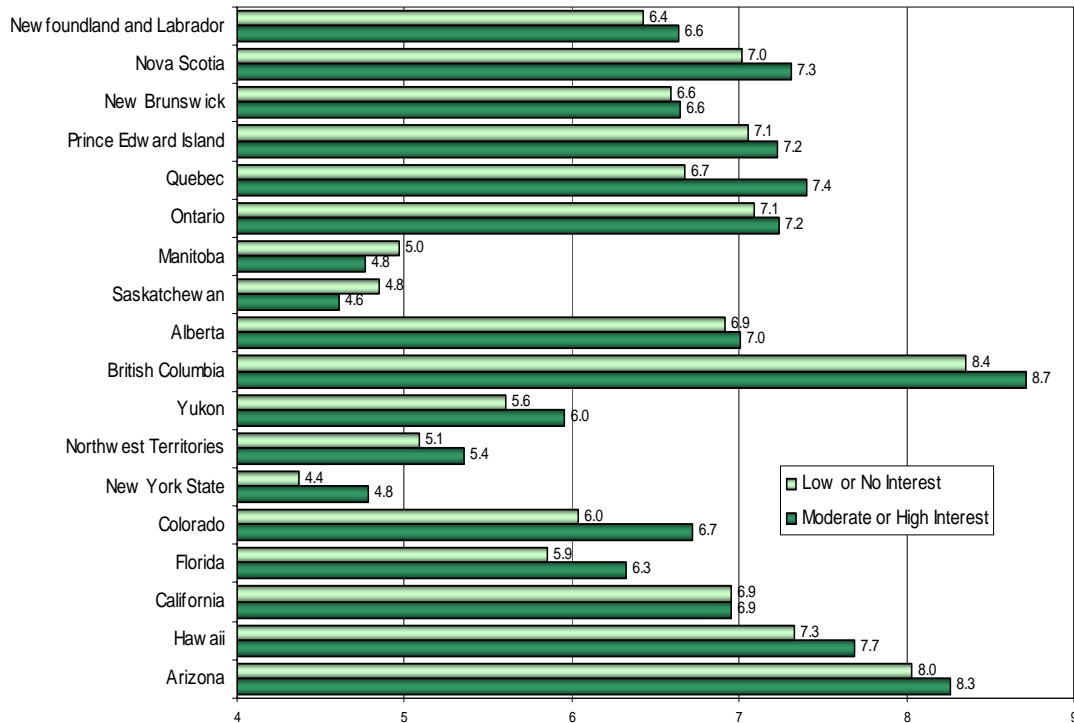
Chart 4: Vacation Destination Visited between 2004-05



- Wine and Cuisine Enthusiasts were frequent travellers, taking an average of 4.1 trips between 2004 and 2005 compared to 3.2 trips for other Canadian travellers.
- Wine and Cuisine Enthusiasts were slightly more likely to have taken overnight trips within Canada, but significantly more likely to have taken trips to U.S. and overseas countries.
- Wine and Cuisine Enthusiasts were more likely to have travelled to Ontario, Quebec, British Columbia, and Alberta.

Destination Appeal Ratings

Chart 5: Average Rating of Appeal of Destinations on a 10-point Scale
(Higher Score = More Appealing)



NOTE: The respondents were asked to rate the appeal of each of Canada's provinces and territories on a ten-point appeal scale, where "10" was "Very Appealing" and "1" was "Very Unappealing". They were also asked to rate six selected U.S. states to provide a reference for comparisons.

- Relative to other travellers, Wine and Cuisine Enthusiasts tended to give higher appeal ratings to all Canadian provinces and territories except Manitoba and Saskatchewan.
- British Columbia (8.7) received the highest rating among the Canadian destinations, followed by Nova Scotia (7.4), and Quebec (7.3), Ontario (7.2), and Prince Edward Island (7.2).
- Arizona was rated as the most appealing among the selected six American destinations, followed by Hawaii.

Benefits Sought from Vacation Travel

Table 4: Benefits Sought from Vacation Travel (Percentage of Canadian Travellers rating each benefit as “highly important”)				
	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
To relax and relieve stress	69%	63%	65%	1.1
To get a break from your day-to-day environment	69%	64%	66%	1.0
To create lasting memories	55%	50%	52%	1.1
To enrich your relationship with your spouse/partner/ children	55%	51%	52%	1.0
To see or do something new and different	52%	39%	44%	1.2
To have a life with no fixed schedule (to do what & when you want)	49%	47%	48%	1.0
To keep family ties alive	41%	45%	43%	0.9
To enrich your perspective on life	35%	24%	28%	1.3
To gain knowledge of history, other cultures or other places	32%	19%	24%	1.3
To stimulate your mind/be intellectually challenged	23%	15%	18%	1.3
To renew personal connections with people (other than family)	21%	18%	19%	1.1
To be challenged physically/to feel physically energized	18%	14%	16%	1.2
To be pampered	15%	12%	13%	1.1
To have stories to share back at home or interesting thing to talk about	13%	13%	13%	1.0
To seek solitude and isolation	9%	10%	9%	1.0

NOTE: The “representation index” is a ratio of the % of moderate or high interest travellers who mentioned one of the benefits listed over the % of total travellers who mentioned that benefit. An index of 1.0 means the percent participating in wine and cuisine-related activities is the same as that of the average travellers; index values over 1.0 indicate that the Wine and Cuisine Enthusiasts are over-represented relative to other travellers and an index value below 1.0 indicates that they are under-represented.

- Similar to other travellers, Wine and Cuisine Enthusiasts considered it highly important that their vacations allowed them to relax and relieve stress, to get a break from their day-to-day environment, to create lasting memories, to enrich family relationship.
- However, Wine and Cuisine Enthusiasts were more likely to place importance on travel experiences that would allow them to enrich their perspective on life, to gain knowledge of history, other cultures or other places, and to stimulate their mind.

Considerations When Choosing a Travel Destination

Table 5: Considerations when choosing a travel destination (Percentage of Canadian Travellers rating each consideration as “highly important”)

	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
Feeling safe at the destination	64%	67%	66%	1.0
No health concerns at the destination	49%	51%	50%	1.0
Lots of things for adults to see and do	40%	37%	38%	1.1
Convenient access by car	39%	46%	43%	0.9
Availability of mid-range accommodation	33%	27%	29%	1.1
Direct access by air	33%	26%	29%	1.2
Information about the destination available on the Internet	27%	23%	25%	1.1
Availability of budget accommodation	19%	24%	22%	0.9
Low cost package deals available for the destination	19%	26%	23%	0.8
Lots of things for children to see and do	14%	18%	17%	0.8
Convenient access by train/bus	13%	13%	13%	1.0
Great shopping opportunities	13%	12%	12%	1.0
Availability of camping"	12%	13%	13%	1.0
Being at a place that is very different, culturally than mine	11%	7%	9%	1.3
Being familiar with the culture and language of the destination	11%	16%	14%	0.8
Availability of luxury accommodation	9%	5%	7%	1.3
Having friends or relatives living there	8%	13%	11%	0.7
Destination is disabled-person-friendly	4%	7%	6%	0.7
None of above	8%	8%	8%	1.0

- Feeling safe at a destination was the most important consideration for the majority of travellers when choosing a destination, regardless of their interest in wine and cuisine-related activities.
- Relative to other travellers, Wine and Cuisine Enthusiasts were more likely to consider it important that a destination:
 - have luxury accommodation,
 - have a different culture than their own, or
 - be directly accessed by air
- However, they were less likely to consider it important that the destination:
 - have friends or relatives living there,
 - be disabled-person-friendly,
 - offer low cost package deals,
 - have lots of things for children to see and do, or
 - have a familiar language and culture.

Activity Participation During Trips

Wine and Cuisine Enthusiasts are quite active when they travel. They are much more likely than other travellers to engage in a variety of outdoor, cultural and entertainment activities.

Outdoor Activities

Table 6: Outdoor Activities Participated in While on Trips				
Activity Categories	Moderate or High Interest	None or Low Interest	Total Travellers	Representation Index
Ocean Activities	69%	51%	59%	1.2
Wildlife Viewing	60%	41%	49%	1.2
Boating & Swimming	56%	45%	50%	1.1
Hiking, Climbing & Paddling	49%	33%	40%	1.2
Games and Individual Sports	37%	26%	31%	1.2
Fishing	29%	29%	29%	1.0
Golfing	27%	18%	22%	1.3
Fitness and Jogging	27%	13%	19%	1.4
Team Sports	26%	14%	19%	1.3
Downhill Skiing & Snowboarding	22%	14%	17%	1.3
Cycling	21%	12%	16%	1.3
Board and Blade	21%	12%	16%	1.3
Snowmobiling & ATVing	15%	13%	14%	1.1
Cross-country Skiing & Snowshoeing	15%	7%	10%	1.4
Sailing and Surfing	11%	5%	8%	1.4
Scuba & Snorkelling	9%	4%	6%	1.5
Horseback Riding	8%	4%	6%	1.3
Hunting	5%	7%	6%	0.9
Motorcycling	4%	3%	4%	1.1
Extreme Air Sports	3%	1%	2%	1.6
Extreme Skiing	3%	1%	2%	1.5

NOTE: The outdoor activities pursued while on trips were submitted to a factor analysis to identify underlying outdoor activities while travelling. Factor analysis is a statistical approach which uses the observed responses to activity items to construct more underlying categories of outdoor activities. This analysis identified to the following 21 underlying categories of outdoor activities, shown in the table above. Appendix A presents individual activity items under each of the 21 categories.

- Similar to other travellers, the top most popular outdoor activities among Wine and Cuisine Enthusiasts were ocean activities, wildlife viewing, boating & swimming, hiking, climbing & paddling, and games and Individual sports.
- Relative to other travellers, Wine and Cuisine Enthusiasts were more likely to have pursued all outdoor activities listed (except fishing and hunting). Wine and Cuisine Enthusiasts were especially more likely to be engaged in extreme air sports, extreme skiing, scuba & snorkelling, cross-country skiing & snowshoeing, sailing & surfing, and fitness exercises (top six indexed).

Culture and Entertainment Activities

Activity Categories	Moderate or High Interest	None or Low Interest	Total Travellers	Representation Index
Shopping and Dining	98%	78%	86%	1.1
Historic Sites, Museums & Art Galleries	78%	49%	60%	1.3
Fine Dining and Spas	69%	20%	40%	1.7
Fairs and Festivals	61%	37%	46%	1.3
Wine, Beer and Food Tastings	58%	3%	25%	2.3
Casino, Theatre and Comedy Clubs	58%	34%	43%	1.3
Theme Parks & Exhibits	47%	35%	40%	1.2
Science and Technology Exhibits	34%	17%	24%	1.4
Agri-Tourism	31%	14%	21%	1.5
Garden Theme Attractions	29%	11%	18%	1.6
Rock Concerts and Recreational Dancing	26%	14%	19%	1.4
High Art Performances	23%	8%	14%	1.7
Professional Sporting Events	21%	12%	16%	1.3
Aboriginal Cultural experiences	20%	7%	12%	1.6
Theatre, Film & Musical Festivals	19%	8%	12%	1.5
Equestrian & Western Events	18%	12%	14%	1.3
Amateur Tournaments	15%	10%	12%	1.2
Archaeological Digs & Sites	13%	4%	8%	1.6
Participatory Historical Activities	10%	3%	6%	1.7
National & International Sporting Events	6%	3%	4%	1.5

NOTE: The culture and entertainment activities pursued while on trips were submitted to a factor analysis to identify underlying culture and entertainment activities while travelling. Factor analysis is a statistical approach which uses the observed responses to activity items to construct more underlying categories of culture and entertainment activities. This analysis identified the following 20 underlying categories of culture and entertainment activities, shown in the table above. Appendix B presents individual activity items under each of the 20 categories.

- Wine and Cuisine Enthusiasts were considerably more active in cultural and entertainment activities than the average Canadian traveller. They had higher incidences of participating in all culture and entertainment activities listed above.
- In addition to activities related to wine/beer/food tastings, and fine dining & spas, Wine and Cuisine Enthusiasts were especially more likely than other travellers to have sought activities related to high art performances, participatory historical activities, aboriginal cultural experiences, visiting archaeological digs & sites, and attending garden theme attractions (top five indexed).

Accommodation Type Used While on Trip

Table 6: Accommodation Type Used While on Trips

	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
Lakeside/Riverside Resort	34%	14%	21%	1.6
Seaside Resort	33%	11%	19%	1.7
Public Campground (National/State/Provincial/municipal Park)	32%	21%	25%	1.3
Private Campground	22%	15%	18%	1.2
Ski Resort or Mountain Resort	22%	8%	13%	1.7
Camp Site in a Wilderness Setting (Not a Campground)	10%	7%	8%	1.3
Health Spa	10%	3%	6%	1.7
Country Inn/Resort Because with Gourmet Restaurant	9%	2%	5%	1.8
Wilderness Lodge You Can Drive to by Car	8%	4%	5%	1.6
A Motor Home/RV while Traveling (Not a Camping Trip)	7%	3%	4%	1.8
Farm or Guest Ranch	5%	2%	3%	1.7
Remote or Fly-In Wilderness Lodge	3%	1%	2%	1.5
On a Houseboat	3%	1%	1%	3.0
Remote or Fly-In Wilderness Outpost	1%	0%	1%	1.0

- Relative to average Canadian travellers, Wine and Cuisine Enthusiasts were considerably more likely to have stayed in all types of accommodation. In particular, they were more likely to have stayed in seaside resort, ski/mountain resort, health spa, and lakeside/riverside resort - types of accommodation normally used by affluent travellers.

Tour and Cruises Taken While on Trip

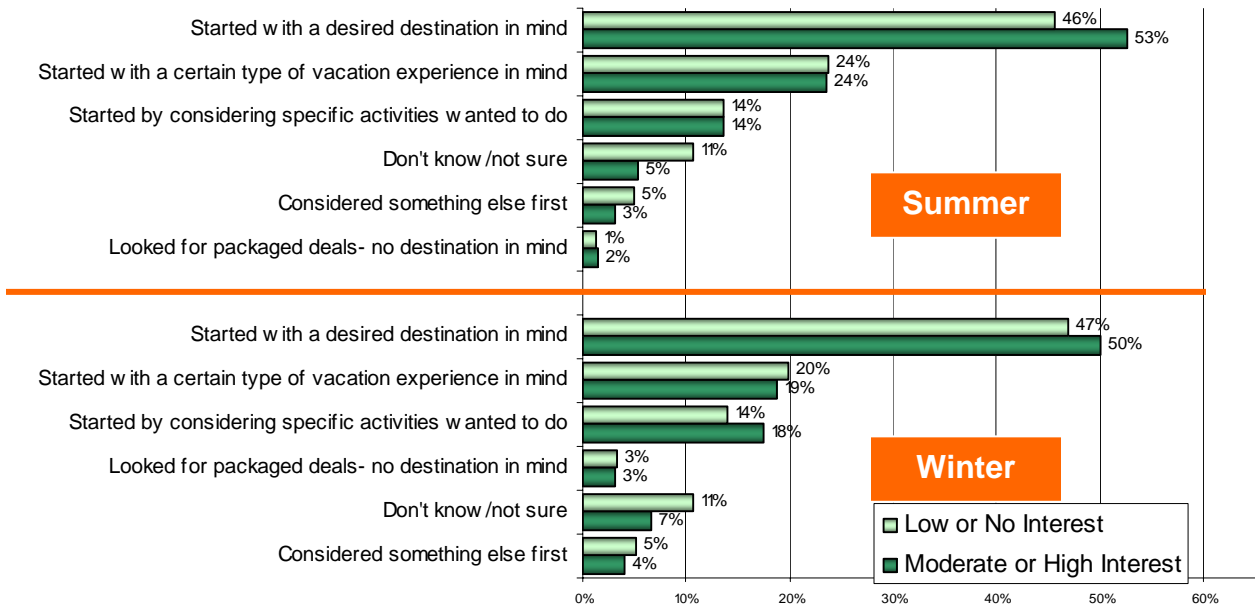
	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
A self guided same-day tour while on an overnight trip	43%	19%	28%	1.5
Around the city	35%	15%	22%	1.6
Around the country side - scenic drives	34%	14%	21%	1.6
An organized same-day guided tour while on an overnight trip	34%	14%	21%	1.6
A self guided overnight tour where you stayed in different locations	27%	11%	17%	1.6
On the water (sightseeing cruise)	21%	7%	12%	1.7
Wilderness tour	19%	8%	12%	1.5
An organized overnight guided tour where you stayed in different locations	17%	6%	10%	1.7
Some other type of tour	14%	6%	9%	1.5
To a winery	14%	0%	5%	2.6
An organized overnight guided tour where you stayed in a single location	12%	5%	8%	1.6
To a casino	10%	4%	6%	1.6
Caribbean ocean cruise	7%	4%	5%	1.4
To a factory	7%	0%	3%	2.6
Ocean cruise - Other	6%	2%	3%	1.8
Cruise on another lake or river	4%	1%	2%	1.6
In the air as a pilot or passenger of an airplane or helicopter	3%	1%	2%	1.9
Cruise on the St. Lawrence River	3%	1%	2%	1.5
Some other type of cruise	3%	1%	2%	1.7
Alaskan ocean cruise	2%	1%	2%	1.5
Great Lakes cruise	1%	0%	1%	1.6
Submarine cruise	0%	0%	0%	1.0
None of these	27%	56%	45%	0.6

- There is a strong association between interest in wine and cuisine-related activities and the likelihood of taking tours and/or cruises while travelling. Wine and Cuisine Enthusiasts exhibited a considerably higher tendency than the average Canadian traveller to have taken all types of tours or cruises. They exhibited a considerably higher participation in tours to wineries or to factories.
- The most popular tours among Wine and Cuisine enthusiasts were self guided same-day tours while on an overnight trip, tours around a city, scenic countryside drives, and organized same-day guided tours while on an overnight trip.

Trip Planning

Considerations when Planning a Trip

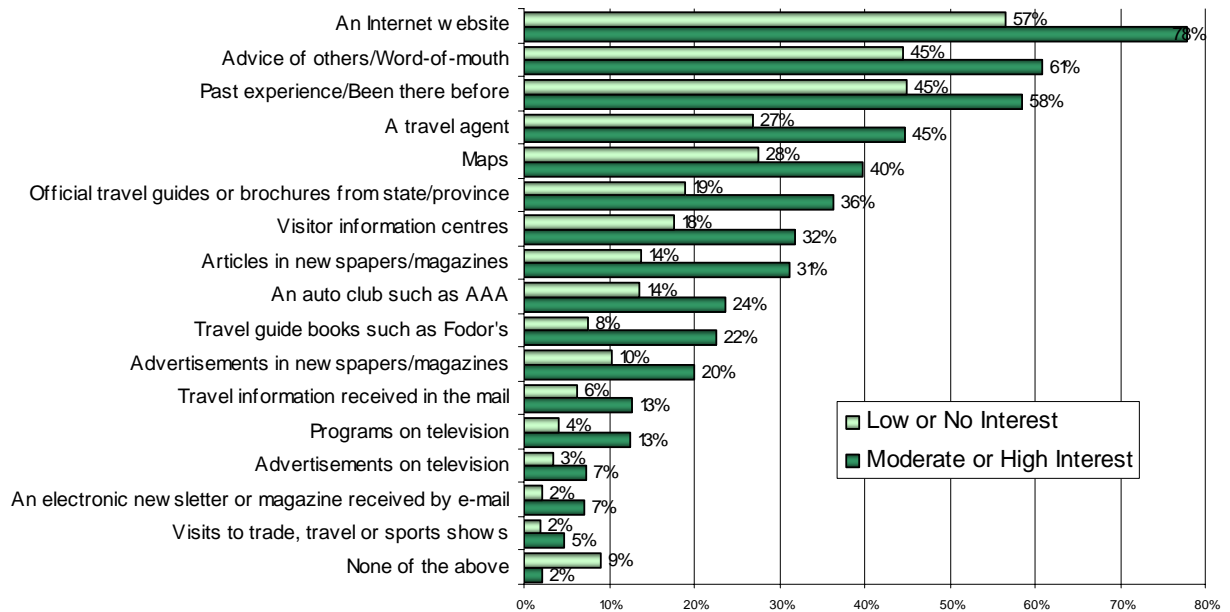
Chart 8: Trip Planning - How Destination Were Selected



- Similar to other travellers, a majority of Wine and Cuisine Enthusiasts started with a particular destination in mind when planning both summer and winter vacation. They were slightly more likely than other travellers to have first considered a desired destination when planning their trips.
- When planning their winter trips, Wine and Cuisine Enthusiasts were more likely (compared to the summer) to start by thinking specific activities they would like to do while travelling.

Information Sources Consulted

Chart 9: Trip Planning - Information Sources Consulted



- Wine and Cuisine Enthusiasts had a substantially higher tendency than the other Canadian travellers to consult a wide range of information sources when planning their trips. The majority of Wine and Cuisine Enthusiasts consulted Internet websites, took the advice of family and friends and considered their own past experiences when planning their trips.
- Travel agents, maps, and official travel guides or brochures from province were also common information sources consulted by Wine and Cuisine Enthusiasts when planning trips.

Internet Use

Table 8: Internet Use for Trip Planning				
	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
Total Internet Users (000s)	5,228	5,554	10,783	
Types of Websites Used				
A website of a hotel or resort	63%	49%	56%	1.1
A tourism website of a country/region/city	56%	42%	49%	1.1
An airline's website	54%	37%	45%	1.2
A travel planning/Booking website (e.g., Expedia)	51%	38%	45%	1.2
A website of an attraction(e.g., museum)	39%	29%	34%	1.2
Some other website	27%	27%	27%	1.0
A cruise line website	10%	6%	8%	1.2
A motorcoach website	3%	2%	2%	1.3
Used Internet to book part of trip				
	3,494	2,997	6,491	
% as of Total Internet Users	67%	54%	60%	1.1
Parts of Trips Booked over the Internet				
Accommodations	74%	64%	69%	1.1
Air tickets	74%	64%	69%	1.1
Car rental	34%	20%	27%	1.2
Tickets or fees for specific activities or attractions	27%	21%	24%	1.1
A package containing at least two of the above Items	19%	12%	16%	1.2
Tickets for rail, bus or boat/ship fares	19%	12%	15%	1.2
Other	4%	3%	4%	1.1

- Relative to the other Canadian travellers, Wine and Cuisine Enthusiasts were more likely to use a large number of websites to help them plan and arrange their trips. Over half of the Wine and Cuisine Enthusiasts used hotel/resort websites, government tourism websites, airline websites and travel booking websites (such as Expedia).
- Wine and Cuisine Enthusiasts were more likely than other Canadian travellers to have booked travel products or services over the internet, with a majority of them booking airline tickets and accommodations over the Internet.

Media Consumption Habits

Table 9: Media Consumption Habits					
		Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
Total Number of Travellers		7,745	13,130	20,875	
Print Media	Reads daily newspaper	89%	85%	87%	1.0
	Reads weekend edition of newspaper	89%	86%	87%	1.0
	Reads local neighbourhood or community newspapers	65%	58%	60%	1.1
	Frequently or occasionally reads travel section of weekend newspaper	58%	39%	46%	1.3
	Frequently or occasionally reads travel section of daily newspaper	55%	39%	45%	1.2
Magazines Read – Top Five	General interest (e.g., Reader's Digest)	35%	27%	30%	1.2
	Entertainment and music (e.g., People, TV Guide)	35%	30%	32%	1.1
	Food and cooking (e.g., Gourmet, Bon Appetit)	33%	22%	26%	1.3
	News magazine (e.g., Time, Newsweek)	30%	19%	23%	1.3
	Home and garden	29%	22%	24%	1.2
Television Programs Watched – Top Five	Movies on TV	70%	70%	70%	1.0
	News/current affairs (e.g., newscasts, 60 Minutes)	69%	61%	64%	1.1
	Dramas (e.g., Law & Order, The West Wing)	59%	54%	56%	1.1
	Situation comedies (e.g., Friends, Will & Grace)	51%	51%	51%	1.0
	Biography	47%	40%	42%	1.1
Radio Programs Listened To – Top Five	News/Talk/Information	46%	34%	38%	1.2
	Modern rock/Alternative rock	39%	34%	36%	1.1
	Oldies (50s, 60s, 70s, 80s)	36%	34%	35%	1.0
	Soft music/Adult contemporary	30%	22%	25%	1.2
	Top 40/Current hits	26%	23%	24%	1.1
Websites Visited – Top Five	Travel	52%	30%	38%	1.4
	Weather	50%	39%	43%	1.2
	Entertainment	45%	36%	39%	1.1
	Health	39%	30%	33%	1.2
	Network news sites (e.g., MSNBC, CNN)	34%	23%	27%	1.3

- Relative to the average Canadian traveller, Wine and Cuisine Enthusiasts were very interested in travel-related media. They were more likely to read the travel section of the newspapers, either daily or weekend. They were also more likely to read food and cooking, and news magazines. They had a particular high interest in travel website and Network news sites.

Membership in Organizations and Programs

Table 10: Membership in Organizations and Programs				
	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
An automobile club like AAA	43%	35%	38%	1.1
A frequent flyer program	37%	18%	25%	1.5
A sports club (e.g., golf club, fitness club)	29%	19%	23%	1.3
Other	19%	14%	16%	1.2
A hotel or car rental loyalty program	15%	5%	9%	1.8
A community service club	13%	9%	11%	1.2
A book/reading club	6%	4%	5%	1.2
A hobby club	6%	4%	5%	1.3
A nature/environment club or group	5%	3%	3%	1.4
A travel club	4%	1%	2%	1.7
None of the above	20%	33%	28%	0.7

- Relative to average Canadian travellers, Wine and Cuisine Enthusiasts were more likely to belong to at least one club or loyalty program. They had particularly higher incidences of belonging to hotel or car rental loyalty programs, travel clubs, frequent flyer programs, sports clubs and/or hobby clubs.

Appendix A: Factor Analysis of Outdoor Activities Engaged in While on Trips

Activity Categories	Individual Outdoor Activities Involved
Wildlife Viewing	wildlife viewing - land based animals bird watching, wildflowers / flora viewing whale watching and other marine life
Fitness And Jogging	jogging or exercising outdoors working out in a fitness centre paintball
Ocean Activities	swimming in oceans sunbathing or sitting on a beach snorkeling in sea /ocean kayaking or canoeing – ocean
Motorboating And Swimming	swimming in lakes motorboating water skiing kayaking or canoeing – freshwater
Hunting	small game birds big game
Golf	golf tour package to play on various courses played during a stay at a golf resort with overnight stay
Team Sports	tennis, volleyball, board games, beach volleyball, bowling
X-Country Skiing	cross country cross country or back country as an overnight touring trip
ATVing	same day excursion overnight touring trip
Hiking And Climbing	mountain climbing /trekking hiking / backpacking in wilderness setting with overnight camping or lodging hiking - same day excursion while on a trip of one or more nights rock climbing,
Cycling (Same-Day)	cycling - recreational cycling, same day excursion
Motorcycling	motorcycling - as a overnight touring trip and day excursion
Cycling (Overnight)	cycling - as an overnight touring trip
Extreme Skiing	heli-skiing ski jouring
Scuba And Snorkelling	scuba diving in lakes /rivers snorkeling in lakes or rivers scuba diving in sea /ocean
Sailing And Surfing	wind surfing, sailing, kite surfing, parasailing
Snowboarding and Skateboarding	snowboarding, skateboarding
Snowmobiling	as an overnight touring trip day use on organized trail
Fishing	salt water, trophy fishing, ice fishing
Horseback riding	with an overnight stop same day excursion

Appendix B: Factor Analysis of Culture and Entertainment Activities Engaged in While on Trips

Activity Categories	Individual Outdoor Activities Involved
Historical Sites, Museums & Art Galleries	Well Known Historic Sites or Buildings
	Other Historic Sites, Monuments and Buildings
	Strolling Around a City to Observe Its Buildings and Architecture
	Museum - General History or Heritage Museums
	Well Known Natural Wonders
	Museum - Military/War Museums
	Historical Replicas of Cities or Towns With Historic Re-Enactments
	Art Galleries
	Paleontological/Archaeological Sites
Aboriginal Cultural Experiences	Aboriginal Cuisine (Tasted or Sampled)
	Aboriginal Arts and Crafts Shows
	Aboriginal Festivals And Events (e.g., Pow Wows)
	Aboriginal Cultural Experiences in a Remote or Rural Setting
	Aboriginal Heritage Attractions (e.g., Museums, Interpretive Centres)
	Aboriginal Outdoor Adventure and/or Sports
Fairs & Festivals	Farmers' Markets or Country Fairs
	Carnivals
	Exhibition or Fairs
	Food/Drink Festivals
	Firework Displays
	Ethnic Festivals
	Free Outdoor Performances (e.g., Theatre, Concerts) in a Park
Science & Technology Exhibits	Museum - Science or Technology Museums
	Science & Technology Theme Park
	Planetarium
	Museum - Children's Museums
	Went to an Imax Movie Theatre
Theme Parks & Exhibits	Amusement Park
	Water Theme Park
	Movie Theme Park
	Aquariums
	Zoos
High Art Performances	Classical or Symphony Concert
	Opera
	Ballet or Other Dance Performances

Activity Categories	Individual Outdoor Activities Involved
Professional Sporting Events	Professional Baseball Games
	Professional Football Games
	Professional Basketball Games
	Professional Golf Tournaments
	Professional Ice Hockey Games
Rock Concerts & Dancing	Music Festivals
	Rock & Roll/Popular Concert
	Musical Attractions
	Jazz Concert
Theatre, Film & Musical Festivals, and Casino	Live Theatre with Dinner
	Stand-Up Comedy Clubs and Other Variety Shows
	Live Theatre
	Went to a Casino
International Film/Literary Festivals	International Film Festivals
	Literary Festivals or Events
Participatory Historical Activities	Historical Re-Enactments (as an Actor)
	Interpretive Program at a Historic Site or National/Provincial Park
	Archaeological Digs
	Curatorial Tours
	Wilderness Skills Courses
Agri-Tourism	Harvesting and /or Other Farm Operations
	Dining At A Farm
	Went to Fruit Picking at Farms or Open Fields
	Entertainment Farms (e.g., Corn Maze, Petting Barnyard)
Gardens Theme Attractions	Garden Theme Park
	Botanical Gardens
Equestrian & Western Events	Equine (Horse) Competitions
	Western Theme Events, such as Rodeos
	Country /Western Music Concerts
Amateur Tournaments	Amateur Sports Tournaments and Competitions
	Curling Bonspiel
	Amateur Tournaments and Competitions other than Sports Related