

# Interest in Wine and Cuisine

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

The U.S. Market

August 2007



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## EXECUTIVE SUMMARY

In 2004 and 2005, 125.7 million Americans participated in at least one type of activity associated with wine and cuisine while on an out-of-town overnight trip. This represents 71% of all adult American travellers. Pursuing activities associated with wine and cuisine was one of the most important travel experiences sought by American travellers while on trips. Of those wine and cuisine participants, 17% (or 21.7 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, going to local outdoor cafés, and visiting wineries for day visits and tasting 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 the listed activities, this report grouped 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

33% (or 58.6 million) of American 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 cities with larger populations. They were more likely to live in District of Columbia, Alaska, California, New Jersey, and Connecticut than other American travellers, but less likely to live in Maine, West Virginia, Idaho, Wyoming, and South Dakota.

There were strong associations between interest in wine and cuisine and levels of education and household income. Better educated and more affluent couples, regardless of their age, were more likely to exhibit an interest in wine and cuisine associated activities.

Wine and Cuisine Enthusiasts were frequent travellers, taking an average of 4.1 trips in 2004 - 2005, versus 3.2 trips for other American travellers. They were more likely than other travellers to take vacations to destinations outside of the United States, including Canada and Ontario.

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

Wine and Cuisine Enthusiasts were very active while on trips during the past two years. They were considerably more likely than other American travellers to participate in a variety of outdoor, cultural and entertainment activities and experiences. They were particularly interested in ocean activities, wildlife viewing, team sports, extreme air sports and hiking and climbing. They were also more likely to have participated in or sought out activities related to fairs and festivals, historic sites, museums, and art galleries, aboriginal cultural experiences, professional sports, and theme parks and exhibits.

Relative to other travellers, Wine and Cuisine Enthusiasts had a higher tendency to consult a larger number of information sources when they were planning trips. Using the internet (86%), considering their own past experiences (63%), and taking advice from friends and relatives (55%) were the most popular information sources. They were also more likely to read the travel section of daily and weekend newspapers and to surf travel-related websites than other 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. 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 American travellers in activities associated with wine and cuisine. The focus is on the differences between American 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, 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
<b>Wine and Cuisine Activities (Net)</b>	<b>34,588</b>
<b>Wine (All Activities)</b>	<b>10,212</b>
Visited wineries for day visits & tasting	7,738
Visited breweries for day visits & tasting	3,769
Stayed at a wine tasting school	190
Stayed at a Country Inn with gourmet restaurant	823
Same-day tour to winery/wineries	2,392
<b>Cuisine Activities (Net)</b>	<b>33,156</b>
Aboriginal cuisine (tasted or sampled)	1,246
Dining - local ingredients and recipes	27,308
Dining - high-end international reputation	7,713
Dining - other high-end restaurants	11,693
Dining at a farm	1,676
Went to local outdoor cafes	13,386
Visited food processing plants	2,820
Stayed at a cooking school	258
<b>Wine/Cuisine Combined (Net)</b>	<b>5,929</b>
Attended food/drink festivals	4,784
Participated in cooking/wine tasting courses	1,887

**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 U.S. MARKET

### *Wine and Cuisine Associated Activities*

Table 1: American travellers who engage in wine and cuisine associated activities			
	Number of travellers engaging in activity (000s)	% of Total American Travellers	% Main Reason for Trip*
<b>Size of Market (000s)</b>	<b>125,732</b>	<b>176,395</b>	<b>21,668</b>
<b>Wine and Cuisine Activities (Net)</b>	<b>125,732</b>	<b>71%</b>	<b>17%</b>
<b>Wine (All Activities)</b>	<b>36,519</b>	<b>21%</b>	<b>20%</b>
Visited wineries for day visits & tasting	27,391	16%	21%
Visited breweries for day visits & tasting	13,389	8%	17%
Stayed at a wine tasting school	755	0%	38%
Stayed at a Country Inn with gourmet restaurant	3,432	2%	32%
Same-day tour to winery/wineries	8,235	5%	0%
<b>Cuisine Activities (Net)</b>	<b>120,506</b>	<b>68%</b>	<b>13%</b>
Aboriginal cuisine (tasted or sampled)	4,460	3%	23%
Dining - local ingredients and recipes	99,627	56%	10%
Dining - high-end international reputation	28,535	16%	14%
Dining - other high-end restaurants	42,326	24%	10%
Dining at a farm	6,237	4%	16%
Went to local outdoor cafes	48,202	27%	8%
Visited food processing plants	9,478	5%	16%
Stayed at a cooking school	1,006	1%	38%
<b>Wine/Cuisine Combined (Net)</b>	<b>21,324</b>	<b>12%</b>	<b>29%</b>
Attended food/drink festivals	17,124	10%	29%
Participated in cooking/wine tasting courses	7,109	4%	27%

\*% 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

- 71% of American travellers, or 125.7 million, engaged in at least one wine or cuisine-related activities while on an overnight trip in 2004 or 2005
  - 36.5 million pursued wine related activities
  - 120.5 million pursued cuisine activities
  - 21.3 million attended food/drink festivals or took cooking/wine tasting courses
- Dining at restaurants offering local ingredients and recipes, going to local outdoor cafes, and dining at other high-end restaurants were the most popular activities within the wine and cuisine set.
- Although a majority of American travellers engaged in wine and cuisine associated activities while on trips, only 17% (or 21.7 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 trip were observed among Americans who:
  - Stayed at a cooking school (38%)
  - Stayed at a wine tasting school (38%)
  - Stayed at a Country Inn with gourmet restaurant (32%)
  - Attended food/drink festivals (29%)
  - Participated in cooking/wine tasting course (29%)
  - Tasted or sampled Aboriginal cuisine (23%), or
  - Went to wineries for day visits & tasting (21%)

### **Wine and Cuisine Market Incidence**

<b>Table 2: Interest in Wine and Cuisine</b>			
	<b>High Interest</b>	<b>Moderate Interest</b>	<b>Low or no Interest</b>
<b>Size of Market (000s)</b>	<b>21,445</b>	<b>37,235</b>	<b>117,715</b>
<b>As % of Total Travellers</b>	<b>12%</b>	<b>21%</b>	<b>67%</b>
Visited wineries for day visits & tasting	70%	29%	1%
Visited breweries for day visits & tasting	42%	10%	0%
Stayed at a wine tasting school	3%	0%	0%
Stayed at a country inn with gourmet restaurant	12%	2%	0%
Same-day tour to winery/wineries	29%	5%	0%
Aboriginal cuisine (tasted or sampled)	13%	4%	0%
Dining - local ingredients and recipes	91%	78%	43%
Dining - high-end international reputation	56%	35%	3%
Dining - other high-end restaurants	63%	47%	9%
Dining at a farm	14%	5%	1%
Went to local outdoor cafes	77%	48%	12%
Visited food processing plants	25%	10%	1%
Stayed at a cooking school	4%	0%	0%
Attended food/drink festivals	40%	15%	3%
Participated in cooking/wine tasting course	27%	3%	0%
<b>Average Number of Activities Pursued</b>	<b>5.7</b>	<b>2.9</b>	<b>0.7</b>

- 33% (or 58.6 million) of American 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. The remaining 67% had a low or no interest in wine and cuisine activities.
- Those with high interest in wine and cuisine activities were more likely to engage in a combination of various associated activities, engaging an average of 5.7 types of wine and cuisine activities. Those with moderate interest in wine and cuisine activities reported participating in an average of 2.9 activities.

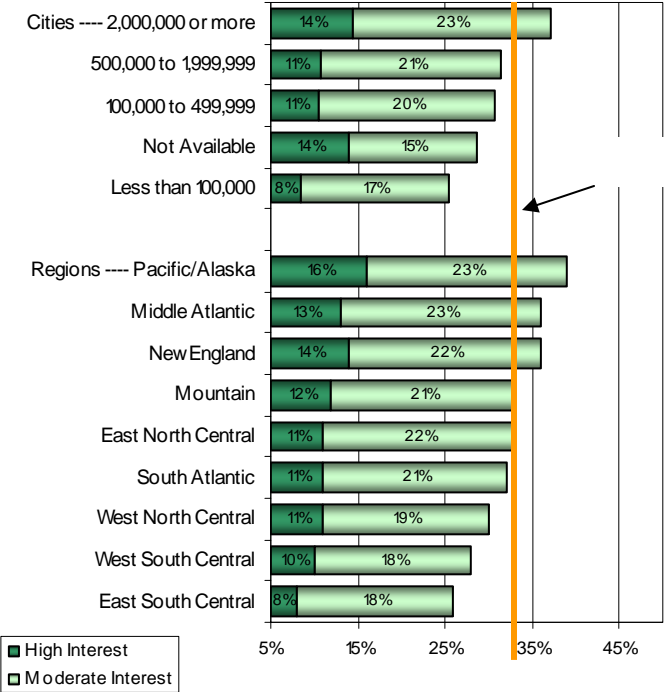
As shown in Table 2 on the previous page, travellers with a moderate or high interest in wine and cuisine associated activities generally pursued more than one type of such activities while traveling. To understand which activities were normally pursued together, this analysis used a statistical approach 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 Lovers	Food Lovers	Wine and Food Dabblers	Total of Wine and Cuisine Enthusiasts
<b>Total Travellers (000s)</b>	<b>12,736</b>	<b>22,702</b>	<b>23,190</b>	<b>58,628</b>
<b>% as of Total of Wine and Cuisine Enthusiasts</b>	<b>22%</b>	<b>39%</b>	<b>40%</b>	
Visited wineries for day visits & tasting	99%	0%	57%	44%
Visited breweries for day visits & tasting	39%	9%	25%	22%
Stayed in country inn with gourmet restaurant	11%	5%	3%	6%
Same-day tour to winery/wineries	28%	3%	16%	14%
Aboriginal cuisine (tasted or sampled)	9%	6%	8%	7%
Dining - local ingredients and recipes	88%	83%	80%	83%
Dining - high-end international reputation	70%	67%	3%	43%
Dining - other high-end restaurants	86%	83%	6%	53%
Dining at a farm	12%	7%	9%	9%
Went to local outdoor cafes	81%	61%	45%	59%
Visited food processing plants	19%	8%	20%	15%
Attended food/drink festivals	35%	20%	22%	24%
Participated in cooking/wine tasting course	26%	5%	12%	12%
Average Age	47.8	44.0	48.4	46.6
Average Income	108,400	91,636	77,583	89,798

- The first 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 couples aged from 54 to 64, holding a university degree and having household income over \$170,000. This would be a prime target market for food and wine-related activities.
- The second group consisted of travellers who had a passion towards food. They dined in various restaurants and local outdoor cafés, but had the lowest incidences of participation in wine-related activities. The members of this group were more likely to be younger travellers (18-34 years old), either singles or couples.
- The third group focused on dining in relatively inexpensive restaurants (offering local ingredients and recipes), although they tended to go to local outdoor cafés and visit wineries for day visits and tasting, but with substantially lower participation than the first group. The members of this group were more likely to be seniors with relatively lower income and lower education levels.

# Market Incidence by Regions

**Chart 1: Market Incidence by Regions**  
**% of Travellers Who Took Overnight Trips**  
**between 2004 and 2005**



- Travellers who exhibited an interest in wine and cuisine were more likely to be from areas with a larger population. Interest in wine and cuisine-related activities increased as the population of the area increased.
- Interest in wine and cuisine-related activities was highest in the Pacific/Alaska Region (39%). The Middle Atlantic (36%) and New England (36%) regions had an above average level of interest in wine and cuisine-related activities. There was below average interest in the West North Central, West South Central and East South Central regions.

## Market Size by Regions

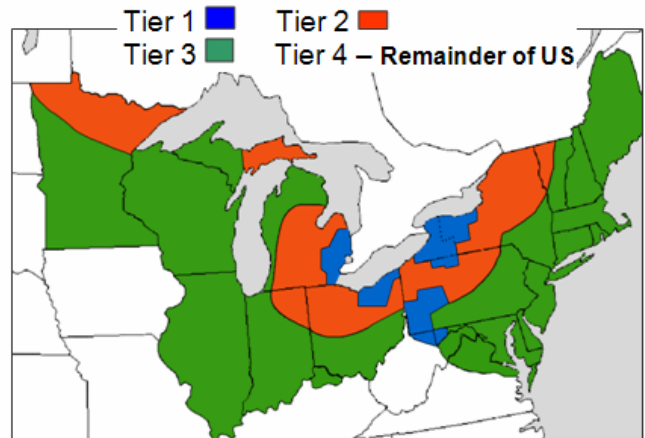
Market Size					
Region	States	High Interest	Moderate Interest	Total Wine and Cuisine Enthusiasts	
New England	Connecticut	291,343	541,165	832,508	
	Maine	53,375	129,885	183,260	
	Massachusetts	564,861	813,446	1,378,307	
	New Hampshire	136,607	179,407	316,013	
	Rhode Island	132,199	131,423	263,622	
New England	Vermont	27,208	106,620	133,827	
	New Jersey	814,033	1,286,431	2,100,464	
Middle Atlantic	New York	1,506,677	2,631,156	4,137,833	
	Pennsylvania	811,927	1,494,721	2,306,648	
East North Central	Illinois	1,031,981	1,813,709	2,845,690	
	Indiana	333,993	656,276	990,269	
	Michigan	652,721	1,344,520	1,997,241	
	Ohio	704,550	1,447,574	2,152,124	
East North Central	Wisconsin	410,044	764,428	1,174,473	
	Iowa	210,334	356,328	566,661	
	Kansas	159,075	350,252	509,328	
	Minnesota	465,943	689,222	1,155,165	
West North Central	Missouri	387,106	665,184	1,052,290	
	Nebraska	91,091	210,888	301,979	
	North Dakota	29,976	79,259	109,235	
	South Dakota	36,475	60,811	97,286	
	Delaware	76,151	94,222	170,373	
	South Atlantic	District of Columbia	39,748	128,488	168,237
Florida		1,341,491	2,340,188	3,681,679	
Georgia		676,852	1,066,273	1,743,125	
Maryland		326,020	518,803	844,822	
North Carolina		443,133	1,146,911	1,590,044	
South Carolina		209,345	431,933	641,279	
Virginia		509,040	965,907	1,474,947	
West Virginia		72,204	139,866	212,069	
East South Central		Alabama	168,200	470,712	638,912
		Kentucky	217,524	477,683	695,208
	Mississippi	133,203	319,355	452,558	
	Tennessee	311,131	585,511	896,642	
West South Central	Arkansas	162,043	253,147	415,191	
	Louisiana	228,271	519,969	748,239	
	Oklahoma	177,264	310,793	488,057	
	Texas	1,300,831	2,306,347	3,607,178	
Mountain	Arizona	436,344	900,150	1,336,494	
	Colorado	421,474	694,893	1,116,367	
	Idaho	103,295	110,243	213,538	
	Montana	39,784	123,891	163,675	
	Nevada	212,378	306,298	518,676	
	New Mexico	139,742	221,172	360,915	
	Utah	111,587	277,466	389,053	
Pacific	Wyoming	32,297	43,898	76,194	
	California	3,756,818	5,236,537	8,993,355	
	Oregon	272,618	533,848	806,466	
Alaska	Washington	598,947	840,866	1,439,813	
	Alaska	75,762	117,222	192,984	

\* A number in red has a sample size less than 100. Be cautious when interpreting

## Market Incidence by Proximity to Ontario

Four regional Tiers were created based on geographic proximity to Ontario and known regional focal points for Ontario's core marketing strategies during the past few years.

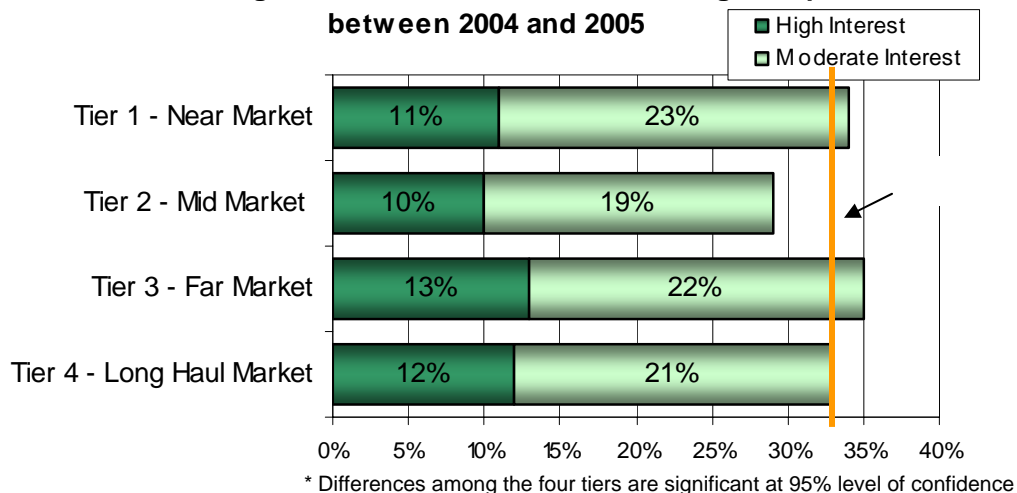
- Tier 1 is based on visitation volume and incidence of travel to Ontario. Most of these markets are key advertising targets, excluding Pittsburgh.
- Tier 2 includes areas 300 km from Ontario but not those in Tier 1.
- Tier 3 and 4 are the long-haul markets.



© TNS Canadian Facts

Tier 1: Total traveller population: 8.6 million  
 Tier 2: Total traveller population: 8.5 million  
 Tier 3: Total traveller population: 52.3 million  
 Tier 4: Total traveller population: 107.0 million

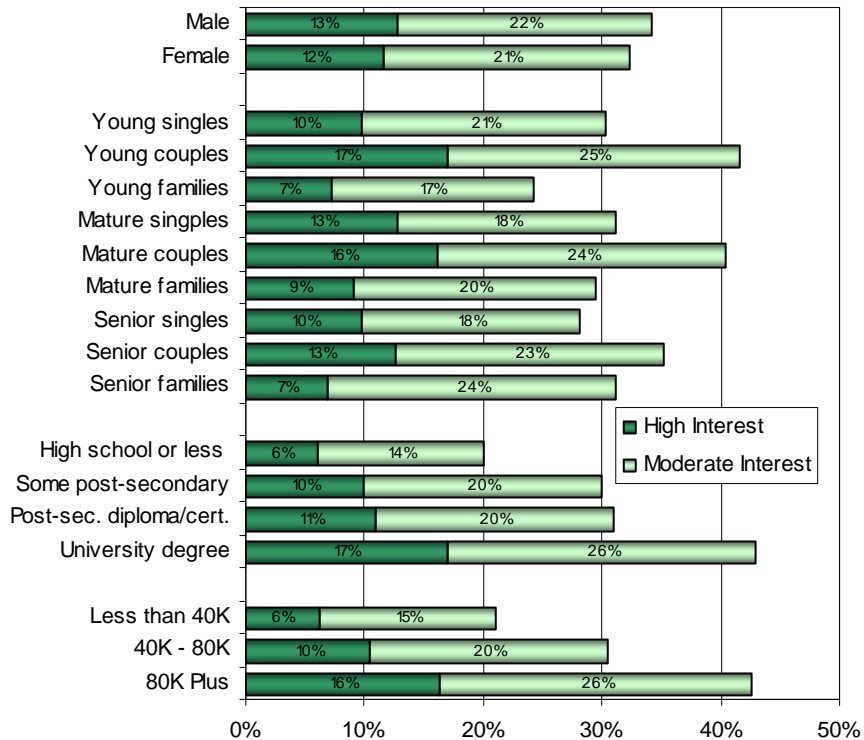
**Chart 2: Market Incidence by Proximity to Ontario**  
 Percentage of Travellers Who Took Overnight Trips  
 between 2004 and 2005



- Ontario's near market (Tier 1) had an above average level of interest, with 11% American travellers in this tier showing high interest in wine and cuisine-related activities and another 23% of the segment showing moderate interest.
- It was Ontario's far market (Tier 3) which exhibited the highest interest in activities associated with wine and cuisine.

## Demographic Profiles

**Chart 3: Demographic Profiles**  
**Percentage of American Travellers Who Took Overnight Trips**  
**between 2004 and 2005**

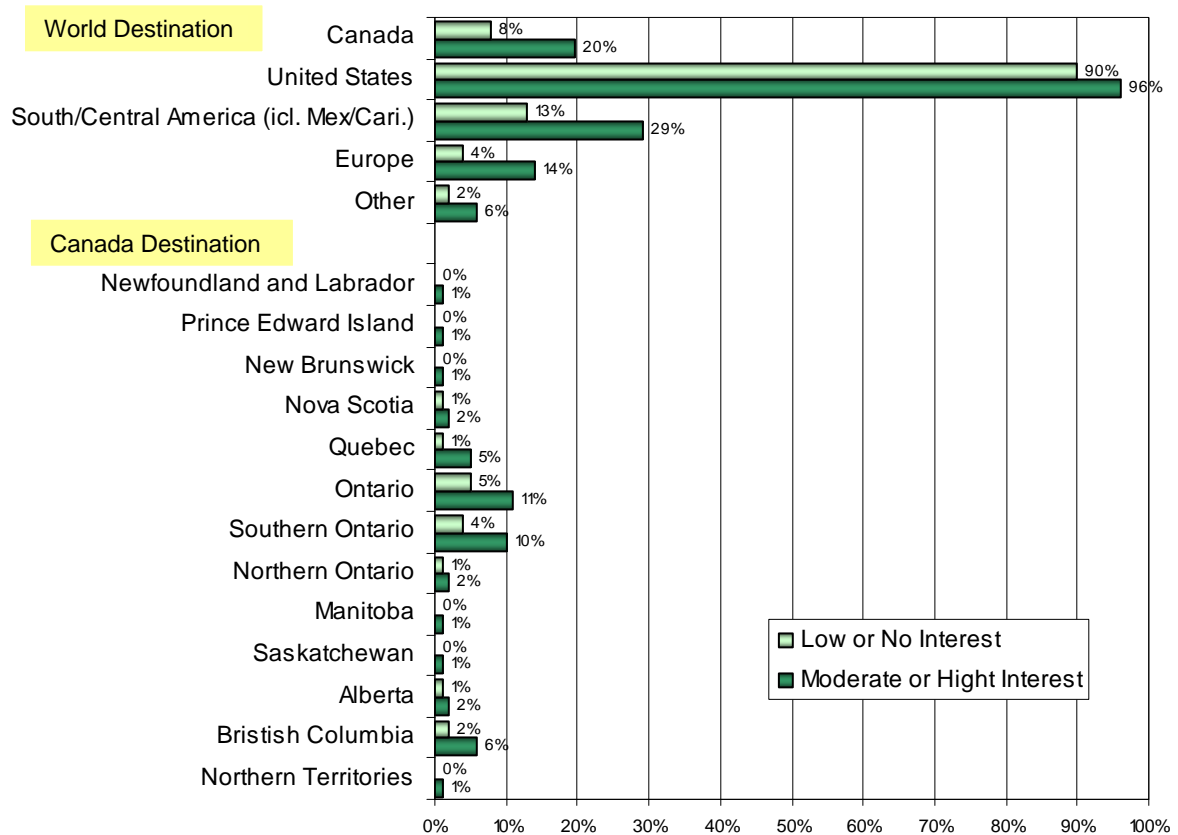


Note: young refers to 18-34 years, mature refers to 35-64 years, and senior refers to 65 or older.

- Couples, 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 such activities
- Interest in activities related to wine and cuisine appears strongly associated with the level of education and household income, increasing as the level of education and household income increased.
- In general, the more affluent and better educated couples emerged as the primary market of such activities.

## Vacation Destinations Visited

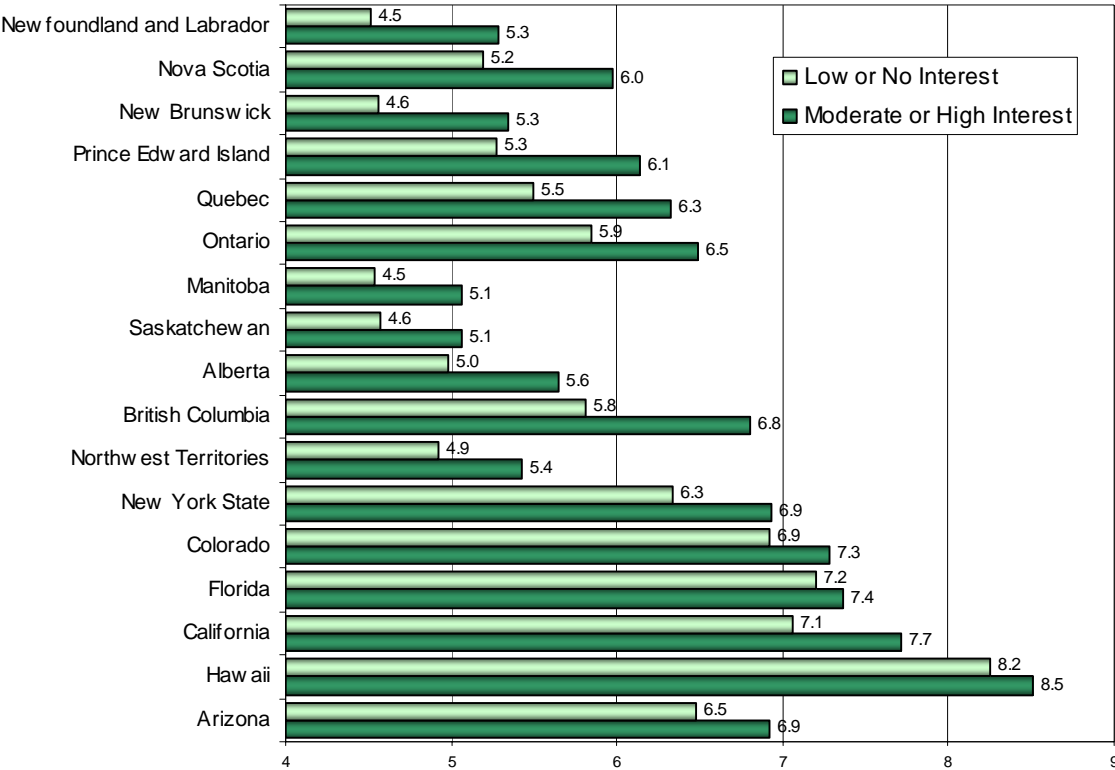
Chart 4: Vacation Destination Visited between 2004-05



- Travellers with an interest in wine and cuisine were frequent travellers, taking an average of 4.1 trips between 2004 and 2005, versus 3.2 trips for other travellers.
- Wine and Cuisine Enthusiasts were slightly more likely to have taken overnight trips within United States, but significantly more likely to have taken trips to Central/Southern Americans, to Canada and overseas countries. This likely reflects the fact that travellers with a moderate or high interest in activities associated with wine and cuisine were also more affluent travellers.
- Wine and Cuisine Enthusiasts were more likely to have travelled to Ontario, Southern Ontario in particular, followed by British Columbia and Quebec.

# 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.

- Travellers, in general, tended to rate Canadian provinces as less appealing travel destinations than the U.S. states. However, Wine and Cuisine Enthusiasts were more likely to give higher appeal ratings to Canadian provinces than those with low or no interest.
- British Columbia received the highest appeal rating of Wine and Cuisine Enthusiasts, followed by Ontario, Quebec and Prince Edward Island.
- Hawaii received the highest appeal rating overall.

**Benefits Sought from Vacation Travel**

<b>Table 4: Benefits Sought from Vacation Travel (Percentage of American Travellers rating each benefit as “highly important”)</b>				
	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
To get a break from your day-to-day environment	72%	70%	71%	1.0
To relax and relieve stress	72%	70%	71%	1.0
To create lasting memories	61%	55%	57%	1.1
To enrich your relationship with your spouse/partner/children	56%	53%	54%	1.0
To see or do something new and different	52%	38%	43%	1.2
To have a life with no fixed schedule (to do what/when you want)	52%	53%	52%	1.0
To keep family ties alive	42%	47%	46%	0.9
To enrich your perspective on life	31%	19%	23%	1.3
To gain knowledge of history, other cultures or other places	28%	15%	20%	1.4
To stimulate your mind/be intellectually challenged	25%	16%	19%	1.3
To renew personal connections with people (other than family)	21%	17%	19%	1.1
To be pampered	19%	14%	15%	1.2
To have stories to share back at home or something interesting to talk about	15%	12%	13%	1.1
To be challenged physically/to feel physically energized	14%	10%	12%	1.2
To seek solitude and isolation	12%	12%	12%	1.0
None of Above	4%	7%	6%	0.7

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 get a break from their day-to-day environment, to relax and relieve stress, and to create lasting memories.
- However, Wine and Cuisine Enthusiasts tended to place more importance on gaining knowledge of history, other cultures or other places, enriching their perspective on life, and stimulating their mind.

## Considerations When Choosing a Travel Destination

Table 5: Considerations when choosing a travel destination (Percentage of American Travellers rating each consideration as “highly important”)				
	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
Feeling safe at the destination	71%	73%	72%	1.0
Lots of things for adults to see and do	52%	45%	47%	1.1
Convenient access by car	44%	55%	51%	0.9
No health concerns at the destination	43%	43%	43%	1.0
Availability of mid-range accommodation	37%	29%	32%	1.2
Direct access by air	32%	22%	26%	1.3
Information about the destination available on the Internet	30%	27%	28%	1.1
Low cost package deals available for the destination	28%	34%	32%	0.9
Availability of budget accommodation	23%	32%	29%	0.8
Great shopping opportunities	18%	15%	16%	1.1
Being familiar with the culture/language of the destination	18%	25%	23%	0.8
Lots of things for children to see and do	15%	23%	20%	0.7
Availability of luxury accommodation	13%	7%	9%	1.5
Being at a place that is very different, culturally than mine	11%	6%	8%	1.4
Having friends or relatives living there	10%	16%	14%	0.7
Convenient access by train/bus	9%	8%	8%	1.1
Destination is disabled-person-friendly	8%	10%	9%	0.8
Availability of camping	7%	8%	8%	0.9
None of Above	6%	7%	7%	0.9

- Feeling safe at a destination was the most important consideration for the majority of American travellers when considering a travel 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 mid-range to 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
  - have lots of things for children to do and see
  - be disabled-person-friendly
  - be budget accommodation available, 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 American travellers to engage in a variety of outdoor and cultural and entertainment activities.

### Outdoor Activities

Table 6: Outdoor Activities Participated in While on Trips				
Outdoor Categories	Moderate or High Interest	None or Low Interest	Total Travellers	Representation Index
Ocean Activities	62%	46%	53%	1.2
Wildlife Viewing	58%	39%	47%	1.2
Hiking, Climbing & Paddling	40%	25%	31%	1.3
Games and Individual Sports	36%	25%	30%	1.2
Boating & Swimming	34%	24%	28%	1.2
Fitness and Jogging	28%	13%	19%	1.5
Fishing	26%	25%	25%	1.0
Golfing	19%	11%	14%	1.4
Downhill Skiing & Snowboarding	15%	8%	11%	1.4
Team Sports	13%	9%	11%	1.2
Cycling	12%	6%	8%	1.5
Horseback Riding	12%	6%	8%	1.4
Snowmobiling & ATVing	11%	8%	10%	1.2
Sailing and Surfing	10%	4%	6%	1.6
Scuba & Snorkelling	8%	4%	5%	1.5
Board and Blade	8%	4%	5%	1.5
Hunting	7%	8%	7%	0.9
Motorcycling	5%	4%	4%	1.2
Extreme Air Sports	4%	1%	2%	1.9
Cross-country Skiing & Snowshoeing	4%	1%	2%	1.7
Extreme Skiing	1%	0%	0%	1.7

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 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, hiking, climbing & paddling, games and Individual sports, and boating & swimming.
- 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, cross-country skiing & snowshoeing, extreme skiing, sailing and surfing (top four indexed).

## Culture and Entertainment Activities

**Table 7: Culture and Entertainment Activities Participated in While on Trips**

Activity Categories	Moderate or High Interest	None or Low Interest	Total Travellers	Representation Index
Shopping and Dining	97%	75%	83%	1.2
Historic Sites, Museums & Art Galleries	76%	46%	57%	1.3
Fine Dining and Spas	67%	17%	35%	1.9
Casino, Theatre and Comedy Clubs	65%	39%	48%	1.3
Fairs and Festivals	63%	32%	43%	1.5
Wine, Beer and Food Tastings	63%	3%	24%	2.6
Theme Parks & Exhibits	62%	46%	52%	1.2
Science and Technology Exhibits	40%	18%	26%	1.5
Rock Concerts and Recreational Dancing	26%	11%	16%	1.6
Garden Theme Attractions	26%	8%	14%	1.8
Professional Sporting Events	26%	12%	17%	1.5
Agri-Tourism	25%	8%	14%	1.8
Equestrian & Western Events	24%	12%	16%	1.4
High Art Performances	21%	6%	12%	1.8
Aboriginal Cultural experiences	17%	5%	9%	1.9
Theatre, Film & Musical Festivals	16%	5%	9%	1.8
Amateur Tournaments	12%	6%	8%	1.5
Archaeological Digs & Sites	11%	3%	6%	1.9
Participatory Historical Activities	8%	2%	4%	1.8
National & International Sporting Events	4%	1%	2%	1.9

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 American traveller. Relative to other travellers, they were more likely to have sought all culture and entertainment activities listed above. They were especially more likely to be engaged in activities associated with aboriginal cultural experiences, visiting archaeological digs & sites, and attending national & international sporting events (top four indexed), in addition to activities related to wine, beer and food tastings, fine dining and spas.

## Accommodation Type Used While on Trip

	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
Seaside resort	31%	11%	18%	1.8
Public campground in a national/state/provincial/municipal park	22%	14%	16%	1.3
Lakeside/riverside resort	21%	8%	12%	1.7
Ski resort or mountain resort	16%	5%	9%	1.8
A private campground	13%	8%	10%	1.4
Health spa	7%	1%	3%	2.3
A camp site in a wilderness setting (not a campground)	7%	4%	5%	1.5
A motor home or RV while traveling or touring (not a camping trip)	6%	3%	4%	1.6
Wilderness lodge you can drive to by car	6%	2%	3%	1.8
Country inn or resort because it had a gourmet restaurant	6%	0%	2%	2.9
Farm or guest ranch	4%	1%	2%	1.8
On a houseboat	3%	1%	1%	2.1
Remote or fly-in wilderness lodge	2%	0%	1%	2.2
Cooking school	2%	0%	1%	3.0
Wine tasting school	1%	0%	0%	3.0
Remote or fly-in wilderness outpost	1%	0%	0%	2.4

- Relative to average American 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 a seaside resort, ski/mountain resort, health spa, lakeside/riverside resort, and country inn or resort with gourmet restaurant on the premise - types of accommodation normally used by affluent travellers.

## Tour and Cruises Taken While on Trip

**Table 9: Tour and Cruises Taken While on Trip**

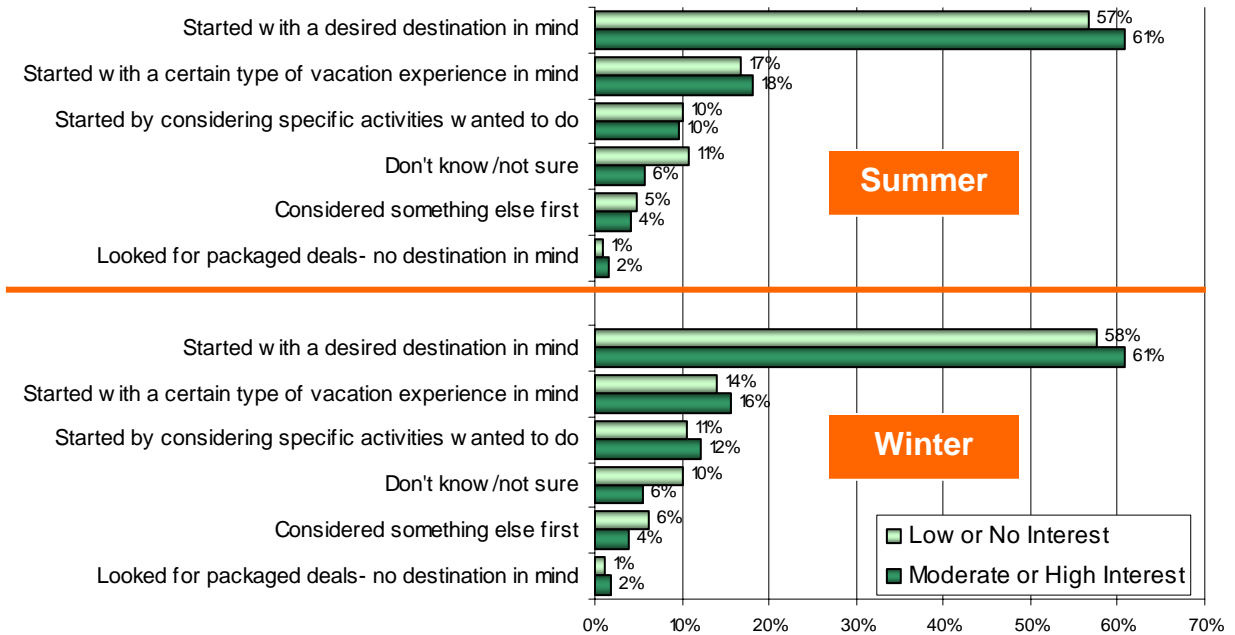
	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
A self guided same-day tour while on an overnight trip	31%	12%	19%	1.7
An organized same-day guided tour while on an overnight trip	30%	12%	18%	1.7
Around the city	27%	10%	15%	1.7
Around the country side - scenic drives	24%	7%	13%	1.9
A self guided overnight tour where you stayed in different locations	18%	6%	10%	1.8
On the water (sightseeing cruise)	15%	4%	8%	1.9
An organized overnight guided tour where you stayed in different locations	14%	4%	8%	1.9
Caribbean ocean cruise	14%	6%	9%	1.6
Some other type of tour	13%	6%	9%	1.6
Wilderness tour	13%	4%	7%	1.8
An organized overnight guided tour where you stayed in a single location	11%	4%	7%	1.7
To a winery	10%	0%	3%	2.9
To a casino	9%	3%	5%	1.9
Ocean cruise - Other	8%	3%	5%	1.8
To a factory	5%	0%	2%	2.8
Alaskan ocean cruise	4%	2%	2%	1.8
Cruise on another lake or river	4%	1%	2%	1.9
Some other type of cruise	3%	1%	2%	1.8
In the air as a pilot or passenger of an airplane or helicopter	3%	1%	1%	2.1
Great Lakes cruise	1%	0%	0%	2.2
Cruise on the St. Lawrence River	1%	0%	0%	2.1
Submarine cruise	0%	0%	0%	1.9
None of these	37%	67%	57%	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 American traveller to have taken all types of tours or cruises.
- The most popular tours among Wine and Cuisine Enthusiasts were same-day tours while on an overnight trip, either self-guided or organized, tours around a city and scenic countryside drives.

## Trip Planning

### Considerations when Planning a Trip

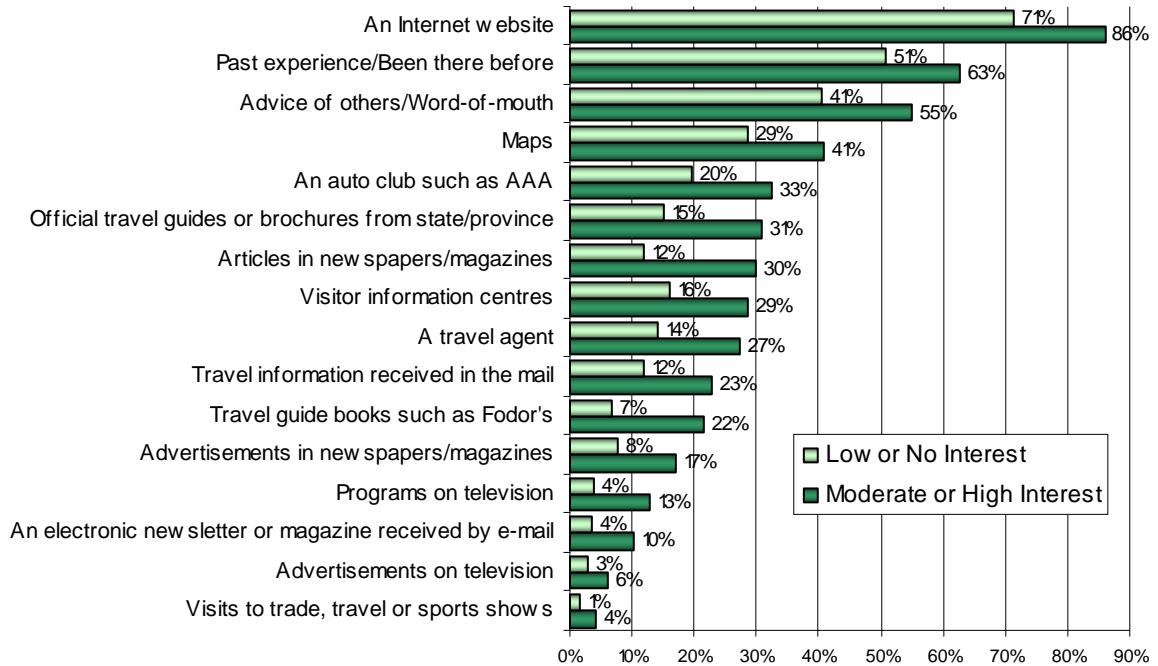
Chart 8: Trip Planning - How Destination Were Selected



- Similar to other American travellers, a majority of Wine and Cuisine Enthusiasts started with a particular destination in mind when planning both summer and winter vacations. They were slightly more likely than other travellers to have first considered a desired destination when planning their trips.

## Information Sources Consulted

Chart 9: Information Sources Consulted



- Wine and Cuisine Enthusiasts had a substantially higher tendency than other American travellers to consult a large number of information sources when planning trips. The majority of Wine and Cuisine Enthusiasts consulted Internet websites, considered their own past experiences, and took the advice of family and friends when planning their trips.
- Maps, auto club such as AAA, 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 10: Internet Use for Trip Planning				
	Moderate or High Interest	Low or No Interest	Total Travellers	Index
Total Travellers in Segment (000s)	45,554	67,457	113,010	
Types of Websites Used				
A travel planning/Booking website (e.g., Expedia)	64%	50%	56%	1.2
A website of a hotel or resort	62%	47%	53%	1.2
An airline's website	58%	37%	46%	1.3
A tourism website of a country/region/city	44%	29%	35%	1.3
A website of an attraction(e.g., museum)	39%	30%	33%	1.2
Some other website	28%	23%	25%	1.1
A cruise line website	18%	9%	12%	1.4
A motorcoach website	2%	1%	1%	1.4
Used Internet to book part of trip				
	34,703	44,016	78,719	
% as of Total Internet Users	76%	65%	70%	1.1
Parts of Trips Booked over the Internet				
Air tickets	80%	64%	71%	1.1
Accommodations	77%	68%	72%	1.1
Car rental	49%	30%	38%	1.3
Tickets or fees for specific activities or attractions	33%	22%	27%	1.2
A package containing at least two of the above Items	23%	14%	18%	1.3
Tickets for rail, bus or boat/ship fares	17%	8%	12%	1.4
Other	3%	2%	3%	1.2

- Relative to other American 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 travel booking websites (such as Expedia), hotel/resort websites, and airline websites.
- Wine and cuisine enthusiasts were more likely than other American travellers to have booked trip components online (76%), with a majority of them booking airline tickets and accommodations over the Internet.

## Media Consumption Habits

### 1: Media Consumption Habits

		Moderate or High Interest	Low or No Interest	Total Travellers	Representative
Number of Travellers (000s)		58,680	117,715	176,395	
Newspapers Read	Reads daily newspaper	65%	57%	60%	
	Frequently or occasionally reads travel section of weekend newspaper	62%	42%	49%	
	Reads weekend edition of newspaper	61%	53%	55%	
	Frequently or occasionally reads travel section of daily newspaper	55%	36%	42%	
	Reads local neighbourhood or community newspapers	54%	47%	49%	
	Reads other types of newspapers	19%	11%	14%	
Magazines Read	Other magazines	44%	40%	41%	
	Entertainment and music (e.g., People, TV Guide)	38%	31%	33%	
	Food and cooking (e.g., Gourmet, Bon Appetit)	31%	17%	21%	
	Home and garden	30%	22%	25%	
	News magazine (e.g., Time, Newsweek)	28%	17%	20%	
TV Programs Watched	Movies on TV	72%	69%	70%	
	Dramas (e.g., Law & Order, The West Wing)	66%	61%	63%	
	News/current affairs (e.g., newscasts, 60 Minutes)	64%	55%	58%	
	Situation comedies (e.g., Friends, Will & Grace)	54%	50%	51%	
	History	51%	42%	45%	
Radio Programs Listened To	Oldies (50s, 60s, 70s, 80s)	48%	42%	44%	
	News/Talk/Information	41%	28%	32%	
	Modern rock/Alternative rock	36%	31%	33%	
	Country music	31%	33%	32%	
	Soft music/Adult contemporary	30%	21%	24%	
Websites Visited	Weather	56%	42%	47%	
	Travel	54%	30%	38%	
	Shopping (all types)	53%	41%	45%	
	Entertainment	50%	39%	43%	
	Health	40%	30%	33%	

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

## Membership in Organizations and Programs

	Moderate or High Interest	Low or No Interest	Total Travellers	Representation Index
An automobile club like AAA	51%	38%	42%	1.2
A frequent flyer program	46%	22%	30%	1.5
A hotel or car rental loyalty program	32%	14%	20%	1.6
A sports club (e.g., golf club, fitness club)	23%	12%	16%	1.5
Other	21%	16%	18%	1.2
A community service club	15%	8%	10%	1.5
A book/reading club	13%	9%	11%	1.2
A nature/environment club or group	8%	4%	5%	1.5
A hobby club	8%	5%	6%	1.3
A travel club	7%	3%	4%	1.8
None of the above	14%	31%	26%	0.6

- Relative to the average American traveller, Wine and Cuisine Enthusiasts were more likely to belong to at least one club or loyalty program. They had particularly higher incidence of belonging to travel clubs, hotel or car rental loyalty programs, sports clubs, frequent flyer programs, or community service clubs.

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

Underlying 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

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 (called “factors”) of outdoor activities. The factors are used to generate factor scores which measure the degree to which these underlying categories. This analysis identified the following fifteen types of outdoor activities:

Underlying Categories/Factors	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

Underlying Categories/Factors	Individual Outdoor Activities Involved
High Art Performances	Classical or Symphony Concert
	Opera
	Ballet or Other Dance Performances
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