

Profile of Culinary Travelers, 2006 Edition

Report of Findings

Prepared by TIA and Edge Research

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International and Oregon
Culinary Tourism Associations

Profile of Culinary Travelers

2006 Edition

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Profile of Culinary Travelers, 2006 was prepared by:

Andrea L. Brunk
Manager, Special Projects

Laura J. Mandala
Vice President, Partnership Research

Suzanne D. Cook, Ph.D.
Senior Vice President, Research

Brenda Roth
Inventive Solutions

Steve Hopkins and Sarah Sullivan
Edge Research

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Research Objectives



The Travel Industry Association Culinary Travel Survey was designed and implemented to meet the following research objectives:

- Estimate the size of the culinary tourism market among U.S. residents.
- Quantify spending on culinary tourism
- Identify/define/segment culinary tourists among general leisure travelers
- Create a demographic profile of culinary tourists compared to general leisure travelers
- Identify various trip activities that correlate with culinary activities
- Understand research and planning behaviors among both culinary tourists and general leisure travelers
- Understand motivators for culinary tourism
- Understand perceptions of and interest in destinations across the United States as culinary travel destinations
- Gauge potential interest in future culinary travel across the leisure traveler market

Methodology



- The Travel Industry Association Culinary Survey was completed by 2364 leisure travelers in the United States.
 - ✧ 2364 surveys were completed among the general leisure traveler population, and an oversample of 359 completes were obtained among “Deliberate” and “Opportunistic” Culinary Travelers.
- Leisure travelers were defined as having taken at least one trip in the past 12 months for pleasure, vacation or personal purposes within the United States that was 50+ miles away from home one-way OR where the traveler spent at least one overnight.
 - ✧ In addition to being a leisure traveler, respondents also needed to have sole or shared responsibility for planning trips for pleasure, vacation or personal purposes.
- Responses were collected using the Greenfield Online panel from July 21st through August 9th, 2006.
- The data were weighted to reflect the U.S. adult leisure traveler population.
- The margin of error for the sample as a whole is +/- 2.0 percentage points at the 95% confidence level.
 - ✧ Confidence levels for subgroups vary and are smaller than for the total population.
 - ✧ The margin of error for Culinary Travelers is +/- 3.6 percentage points at the 95% confidence level, for food travelers is +/- 4.6 percentage points and for wine travelers is +/-4.9 percentage points.
 - ✧ Throughout this report, subgroup differences that are significant at the 95% confidence level are highlighted with lettered notations.

Definitions & Base Sizes



For the purposes of this study we have the following definitions:

- ✧ **Leisure Travelers:** Travelers who have taken at least one trip in the past 12 months for pleasure, vacation or personal purposes within the United States that was 50+ miles away from home one-way OR where the traveler spent at least one overnight and have shared or sole responsibility for travel planning.
- ✧ **Food Travelers:** Leisure travelers who engage in various activities such as attending cooking classes, dining out for a unique and memorable experience, shopping at farmers markets, shopping for gourmet food, or attending food festivals, etc.
- ✧ **Wine Travelers:** Leisure travelers who participate in wine tours, drive wine trails, taste locally made wines or attend wine festivals.
- ✧ **Culinary Travelers:** Leisure travelers who engage in either or both food travel and wine travel.

Sample sizes for the various groups mentioned in this report are outlined below. A weighting scheme was applied to balance the sample to represent the U.S. leisure travel population. Sample sizes presented throughout this report represent the actual sample.

- ✧ **Leisure Travelers:** n=2364
- ✧ **Food Travelers:** n=451
- ✧ **Wine Travelers:** n=406
- ✧ **Culinary Travelers:** n=731

Executive Summary



➤ The Market

While clearly a niche travel market, culinary travel involves millions of travelers spending billions of dollars. Overall, 17% of American leisure travelers have engaged in some type of culinary or wine-related activity while traveling within the past three years. This equates to just over 27 million travelers.

Beyond participating in culinary activities on trips, travelers can be further divided into groups based on how central these activities have been to their trip and the planning process.

Just under 8% of leisure travelers (12.6 million) report that food or wine-related activities were a key reason they took a trip or helped them choose between destinations. These are classified as “Deliberate” Culinary Travelers. Another 4.7% of leisure travelers (7.6 million) can be classified as “Opportunistic” Culinary Travelers, meaning that they took at least one trip where they sought out culinary activities, but these were not a factor in choosing destinations. Finally, 4.4% of leisure travelers (7.1 million) can be classified as “Accidental” Culinary Travelers because they participated in culinary activities on a trip “simply because they were available.”

Executive Summary (continued)



➤ Culinary Traveler Profiles

One of the most interesting findings from this study is that the incidence of Culinary Travelers does not vary significantly by basic demographic and regional groups. Both men and women, as well as most age groups, are about equally as likely to contain Culinary Travelers. The one exception to this is mature travelers, who are less likely to engage in culinary travel currently, and are also less likely to express future interest in it.

However, clear and significant differences on current and future culinary travel are evident across socioeconomic groups. For example, travelers with post-graduate educations are about three times as likely to fall into the Serious Culinary Travel group (Deliberate or Opportunistic) as those who have a high school education or less (18% vs 8%). Similarly, 21% of travelers from households with annual incomes over \$100,000 have participated in some form of culinary travel, compared with 10% of those earning less than \$50,000.

Culinary Travelers tend to be active travelers. They are significantly more likely than the general leisure travel population to have participated in every travel activity tested. In comparison to the general leisure traveler population, Culinary Travelers are particularly likely to participate in cultural activities (concerts, museums, etc.), enjoy spa services, visit state/national parks, visit historic sites, and participate in a variety of outdoor activities.

Culinary Travelers are significantly more likely than leisure travelers in general to read print materials, including specialty newspaper sections, “official” materials, culinary publications, and travel magazines. They are also significantly more likely than leisure travelers in general to utilize online resources for trip research and planning.

Executive Summary (continued)



➤ Culinary Travel Motivators

For most, culinary travel is clearly related to the need to have unique culinary experiences that are not available in one's home area. About nine-in-ten Deliberate Culinary Travelers report that important factors in selecting domestic destinations include "experiencing flavors/foods that are not available in your area," "a restaurant atmosphere that is unique," and "food is unique or different."

The desire to experience regional and local cuisine is a major factor behind the desire to participate in culinary travel. Large majorities of Serious Culinary Travelers (Deliberate or Opportunistic) agree with each of the following statements:

- I like to try different/new restaurants most nights when I travel to experience a range of local cuisines (84%).
- I enjoy learning about the local culture and cuisines of the different travel destinations I visit (85%).
- I like to bring back regional foods, recipes, wines, etc. from the places I visit and share them with my friends and family (70%).
- I want my travel to always be "experiential", so I make an effort to try regional cuisines, culinary specialties, local wines/spirits, etc (66%).+
- I visit wineries or participate in wine tours because I want to try wines unique to the destination (60%).

Just under one-quarter of the leisure traveler population has heard of the term "Culinary Tourism." Among those who have, the main theme emerging from open-ended responses is that culinary tourism is travel to experience new and different types of regional cuisine.

Driver analysis indicates that sharing foods/recipes/wines/etc. with friends and family and a desire for regional culinary experiences are the attitudes most highly correlated with interest in future culinary travel.

Executive Summary (continued)



➤ Food-Related Travel

One-in-ten leisure travelers (10.1%) report that they have engaged in food-related culinary travel activities within the past three years. This equates to over 16 million travelers. (In this study, food-related travel was defined as “participating in culinary activities (cooking classes, dining out for a unique and memorable experience, farmers markets, gourmet food shopping, etc.) or attending food festivals.”)

Food Travelers can be further classified by the importance of these activities to their planning process and destination selection.

Deliberate. 4.8% of leisure travelers (7.9 million) report that food-related activities were a key reason they took a trip or helped them choose between destinations.

Opportunistic. 3.0% of leisure travelers (4.9 million) report they took at least one trip where they sought out culinary activities, but these were not a factor in choosing destinations.

Accidental. 2.3% (3.7 million) participated in culinary activities on a trip “simply because they were available.”

The majority (78%) of Food Travelers have taken more than one trip during the past three years in which they engaged in culinary activities. Just over one-quarter (27%) report they have taken six or more trips.

Most Food Travelers (87%) took their most recent trip with someone, and by far the most common travel companion is a spouse/significant other (63%). Notably, large percentages took their most recent food trip with members outside of their households.

Executive Summary (continued)



On average, Food Travelers spend over one-third (36%) of their personal travel budget on food-related activities. Deliberate and Opportunistic Food Travelers are spending a significantly higher dollar amount (\$427 and \$593 on average, respectively) and a larger share of their budget (34% and 50%, respectively) on food-related activities than Accidental Food Travelers (\$212 on average, or 20% of total personal spend).

While it's not surprising that going to a restaurant "just to eat" is the most common food-related activity, others that are consistent across groups include going to local restaurants for a unique and memorable experience and experiencing local or regional cuisine. Deliberate Food Travelers are more likely than others to participate in a variety of other food-related activities, including:

- Visiting farmers markets (29%)
- Sampling traditional artisan products (e.g. cheeses) (27%)
- Attending a culinary festival (i.e. chili, cheese, chocolate, etc.) (24%)
- Touring wineries / Tasting locally made wines (21%)
- Touring local breweries/ Tasting locally brewed beers (20%)
- Driving a wine trail (13%)
- Attending a wine festival (11%)

In terms of food travel destinations, California (14%) and Florida (10%) are most common, followed by New York (7%) and Texas (6%). All other states were mentioned by fewer than 5% of Food Travelers.

Executive Summary (continued)



➤ Wine-Related Travel

Almost one-in-ten leisure travelers (9.4%) report that they have engaged in wine-related travel activities within the past three years. This equates to just over 15 million travelers. (In this study, wine-related travel was defined as “participating in winery tours, driving a wine trail, tasting locally made wines or attending wine festivals.”)

Wine Travelers can be further classified by the importance of these activities to their planning process and destination selection.

Deliberate. 4.1% of leisure travelers (6.6 million) report that wine-related activities were a key reason they took a trip or helped them choose between destinations.

Opportunistic. 2.6% of leisure travelers (4.2 million) report they took at least one trip where they sought out wine-related activities, but these were not a factor in choosing destinations.

Accidental. 2.7% (4.4 million) participated in wine-related activities on a trip “simply because they were available.”

Two-thirds (64%) of Wine Travelers have taken more than one trip during the past three years in which they engaged in wine-related activities.

Overall, 51% visited more than one winery on their most recent trip in which they engaged in wine-related activities. Seventy percent (70%) of Deliberate Wine Travelers visited multiple wineries, while a plurality of Opportunistic Wine Travelers (47%) and a majority of Accidental Wine Travelers (58%) visited one winery.

Executive Summary (continued)



Two-thirds of Wine Travelers (65%) toured wineries or tasted local wines, one-quarter (24%) report they drove a wine trail, and just over one-in-ten (12%) attended a wine festival. Wine trails and festivals are particularly prevalent among Deliberate Wine Travelers (33% and 20%, respectively).

Six-in-ten Wine Travelers (58%) report that their most recent trip involving wine-related activities was to wineries outside their home state, while 44% report they traveled to wineries in their home state. It is notable that a majority of Deliberate Wine Travelers (58%) report their most recent trip involving wine-related activities was to wineries in their home state (compared to 46% out of state). Opportunistic and Accidental Wine Travelers are significantly more likely to have visited wineries out of state (70% and 66%, respectively).

As with food-related travel, two people is the most common party size for Wine Travelers (43%). Two-thirds (67%) took their trip with their spouse or significant other, and one-fourth (25%) did so with friends.

On average, Wine Travelers report spending \$219 on wine-related activities on their last trip, which equates to 23% of their total travel spending. Deliberate Wine Travelers report that on their last wine-related trip they spent an average of \$339 on purchases related to wine, which represents 36% of their overall personal travel spending. Opportunistic Wine Travelers spent an average of \$177 on their last trip (16% of personal spending), compared to \$79 for Accidental Wine Travelers (9% of personal spending).

Perhaps not surprisingly, among all states, California dominates as a destination for wine-related travel, with one-third (32%) reporting this was the location of their most recent trip involving wine-related activities. New York was a destination for 10%, and all other states were each destinations for 5% or fewer of Wine Travelers.

Executive Summary (continued)



➤ Future Culinary Travel

Overall, three-fifths of American leisure travelers (60%) report they are at least somewhat interested in taking a trip to engage in culinary activities within the next year, while one-fifth (20%) are very interested. Total interest is significantly higher among women (65%) than men (50%), and is lowest among those over 65 (38%).

While not as pronounced a pattern as is evident among current Culinary Travelers, interest in future culinary travel is significantly higher among those with annual household incomes of \$75,000 or more (66%), and marginally higher among those with college education (61%).

Just under half of all leisure travelers (47%) report they are likely to participate in food-related travel in the future. The likelihood to participate in future food-related travel is highest among women (51%), those with a post-graduate education (54%) and those from households with annual incomes of \$100,000 or more (59%).

Two-in-five leisure travelers (40%) report they are likely to participate in wine-related travel in the future. While consistent across age and gender groups, future travel likelihood is higher among those with a college education (48%) and those from households earning \$75,000 or more annually (51%).

Among those interested in future culinary activities, going to restaurants for unique and memorable experiences and local/regional cuisine top the list, with over nine-in-ten indicating they would be very or somewhat interested in participating in those activities in the future. Large shares also report they are interested in visiting farmers markets (83%), sampling traditional artisan products (81%), attending culinary festivals (77%), tasting locally made wines (72%) or touring wineries (71%).

Implications



- **While many travel providers have had an intuitive understanding of the value of wine and culinary travelers, this study is the first in the U.S. to size and profile this important segment of the U.S. tourism market.**
- **The study demonstrates that a sizable proportion of the U.S. leisure travel market does indeed make travel decisions based on a desire for wine and culinary experiences. In fact, it confirms that wine and culinary experiences are a driver of destination choice.**
- **Nearly all wine and culinary travelers are looking for unique experiences. This reinforces the benefits of focusing on the destinations' unique environmental and cultural elements. The study confirms what has been documented in other studies of both the leisure and business traveler markets, that travelers desire a unique experience when away from home.**

Implications (Continued)



- **The study identifies what we have called the “serious” culinary traveler-the traveler who intentionally seeks out wine and food experiences while traveling. Serious culinary travelers are significantly different from other types of travelers, which has implications for any travel provider’s strategy and marketing. Serious culinary travelers are more likely to:**
 - **Be upscale in terms of their education and income;**
 - **Participate in a wide variety of other trip activities ranging from shopping and spa services, to cultural and heritage-related activities, to outdoor/nature-based experiences;**
 - **Choose a destination to experience local culture and cuisine;**
 - **Spend more money per trip, especially for food and wine;**
 - **Be active information seekers, relying heavily on word-of-mouth recommendations but also reading food and wine magazines and a variety of other print publications such as newspapers and news magazines, as well as using online information resources.**

Implications (Continued)



- **These differences suggest that this segment of the market may be responsive to travel packages that focus on the uniqueness of the destination and the local food, wine, and environment. It also suggests that travel providers and destinations should work together to offer “immersion” into the local culture, from everything to the hotel experience, national/state parks, and local wine and cuisine.**
- **The fact that the serious culinary travelers read highly specialized publications that cater to their interests confirms that magazines remain a viable channel for reaching this travel segment. However, in addition, large percentages rely on recommendations from friends and family, as well as online resources, suggesting the need for multi-faceted yet integrated marketing campaigns to reach this market.**

Destinations:

- The data reveal that wine and culinary travelers are very likely to take local foods and wines back home to share with family and friends. This presents a secondary opportunity for destinations to spread the word about their unique offerings. In addition to word-of-mouth, food and wine provide very tangible examples of the unique qualities of the destination.**

Implications (Continued)



Other Travel Providers:

- Partnerships among travel providers to create packages that combine the experiences that are desired among this travel segment could prove fruitful. Destinations, hotels, cultural institutions, culinary purveyors, wineries and others may find it beneficial to work together to help extend the culinary travelers' length of trip, resulting in higher spending by the travel party. By profiling these travelers and identifying their interests, this study should provide travel marketers with the intelligence they need to help better shape their offerings to attract increasing numbers of culinary travelers, to enhance customer satisfaction, and ultimately to increase their intent to return.**
- The common interests of wine and culinary travelers and the overlap in their demographics and travel behaviors suggest there are many opportunities for cross-selling to these visitors. Cross promotions of hotels, wineries, restaurants and museums can help ease the travel "hassle" for these visitors while at the same time extending their stay and enhancing their experience.**

Implications (Continued)



Market Potential:

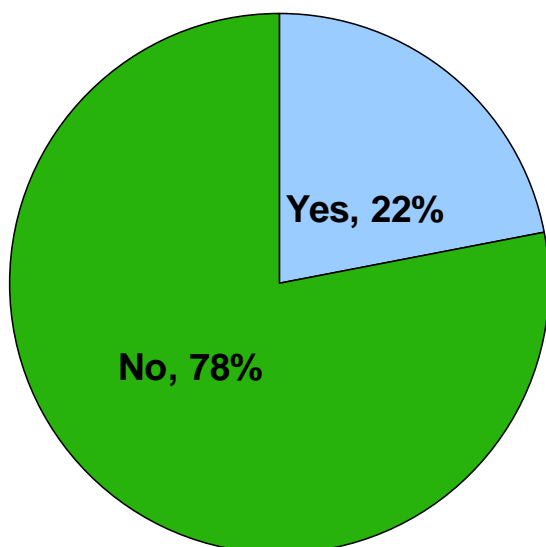
Finally, the study suggests that there is strong potential for additional growth of this market in the future. The share of U.S. leisure travelers interested in culinary travel in the near future is significantly larger than those currently engaged, offering an opportunity for insightful travel destinations and companies to develop new business in an increasingly competitive travel environment.

Definition of Culinary Tourism

- Just under one-fourth (22%) of leisure travelers have heard of “Culinary Tourism.” When asked what this term means, the main theme emerging from open-ended responses is that it is travel to experience new and different types of regional cuisine. Some also incorporated learning how to cook different foods in their definitions, and/or trying new and different restaurants.

Heard of Term “Culinary Tourism”?

Base: Leisure Travelers n=2364



How Would You Define “Culinary Tourism”?

Base: Leisure Travelers n=2364

- “Traveling to experience different types of food”*
- “Traveling to try the foods of different regions”*
- “Traveling to a location for the purpose of eating certain local foods or eating in certain local/famous restaurants.”*
- “Experiencing the tastes of different cultures.”*
- “Traveling to learn more about the food/wine culture of another country”*
- “Traveling to experience the food of other cultures, and maybe taking classes to learn how to cook that food”*
- “Going on trips to either visit certain restaurants or to learn to cook a particular type of cuisine”*
- “Visiting restaurants, wineries, farms or other localities etc. that produce and/or prepare various food specialties”*

Q5b. The term “Culinary Tourism” is coming into increasing use. Have you ever heard of this term?

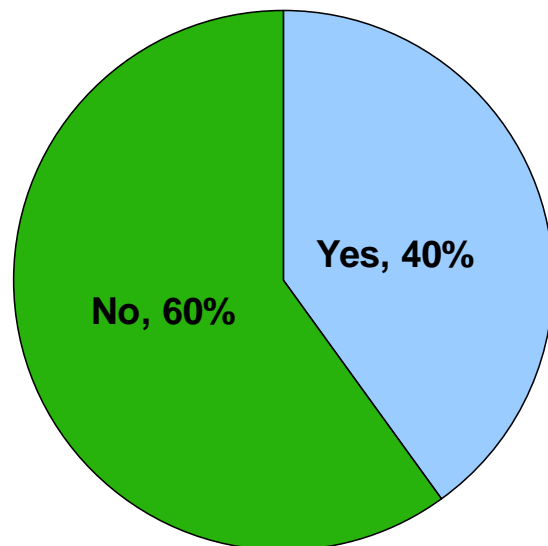
Q5c. Regardless if you’ve heard of it or not, how would you define Culinary Tourism?

Definition of Culinary Tourism

- Two in five leisure travelers (40%) said they considered themselves to be people who travel to learn about or enjoy unique and memorable eating and drinking experiences. Respondents named various destinations for culinary tourism, but several surfaced to the top.

Self-Identified Traveler Who Enjoys Unique/Memorable Eating and Drinking Experiences

Base: Leisure Travelers n=2364



Unaided Destinations that Come to Mind for Culinary Tourism

Base: Leisure Travelers n=2364

<i>Boston</i>	<i>Maine</i>
<i>California</i>	<i>New England</i>
<i>The Carolinas</i>	<i>New Orleans</i>
<i>Chicago</i>	<i>New York City</i>
<i>Florida</i>	<i>Philadelphia</i>
<i>Hawaii</i>	<i>San Francisco</i>
<i>Kansas City</i>	<i>Southwest (Tex-Mex)</i>
<i>Kentucky</i>	<i>Tennessee (Memphis)</i>
<i>Las Vegas</i>	<i>Texas</i>

Q5e. Do you consider yourself someone who travels to learn about or enjoy unique and memorable eating and drinking experiences—not necessarily just those that are exclusive or highly acclaimed, but all memorable eating and drinking experiences?

Q5d. Culinary Tourism can be defined as “travel to learn about or enjoy unique and memorable eating and drinking experiences—not necessarily just those that are exclusive or highly acclaimed, but all memorable eating and drinking experiences. When thinking about destinations for culinary tourism, as defined above, what destinations within the United States come to mind?



Culinary Travel

Travel to learn about or enjoy unique and memorable eating and drinking experiences – not necessarily just those that are exclusive or highly acclaimed, but all memorable eating and drinking experiences.

Defining Culinary Travelers



- This study segmented Culinary Travelers into three groups based on the level of influence food-related and/or wine-related activities played in their travel decisions. The segments are mutually exclusive (except when noted in footnote) and respondents were assigned to a segment based on their highest level of agreement.

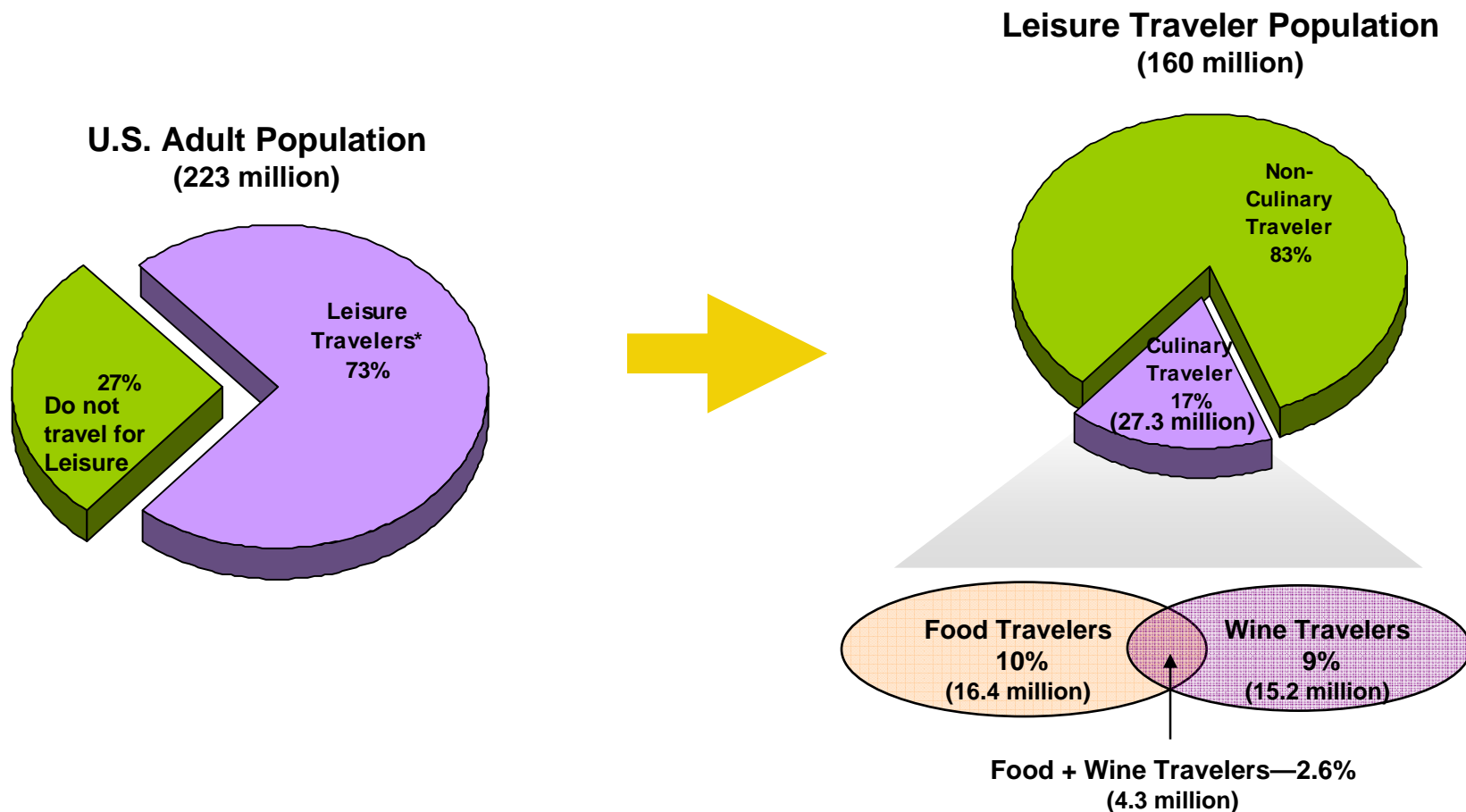
- **Deliberate:** Respondents indicated they took one or more trips where the availability of (food/wine-related) activities was:
 - A key reason to take the trip, or
 - Helped them choose between potential destinations.

- **Opportunistic:** Respondents indicated they took one or more trips where they sought out (food/wine-related) activities but these activities were not a factor in choosing between destinations.

- **Accidental:** Respondents indicated they took one or more trips where they participated in (food/wine-related) activities simply because the activities were available.
 - This group of respondents are the least committed of the culinary tourists, as food and/or wine activities did not influence taking a trip nor the trip destination. However, data for this group are included in various sections of this report because ultimately these travelers are contributing to culinary spending in the destinations they are visiting.

Distribution and Sizing of Culinary Travel Market

- 73% of the adult population travels for leisure annually per the study definition and are involved in the travel decision making process.
- Overall, 17% (27.3 million) of American leisure travelers have participated in one or more culinary activities while traveling over the past three years. Furthermore, 2.6% of leisure travelers report being both Food and Wine Travelers.

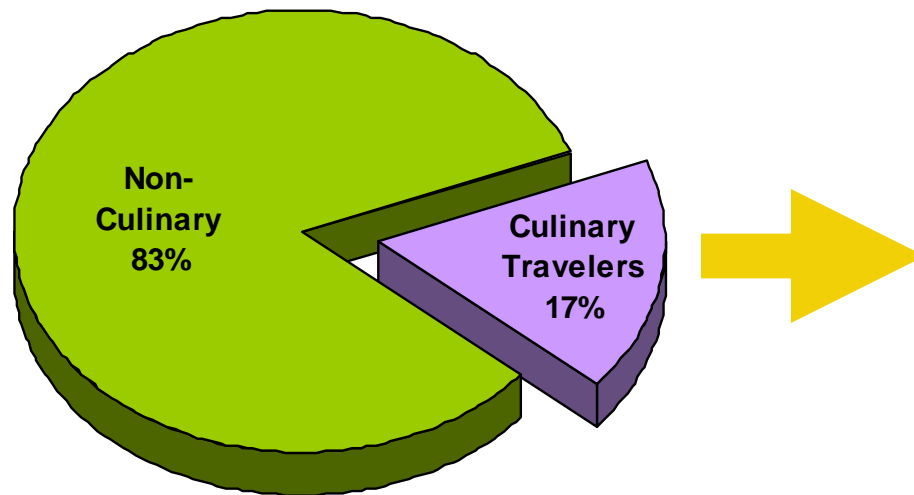


*Leisure Travelers: those who have taken a pleasure, vacation or personal trip away from home of at least 50 miles or where they spent at least one overnight in the past 12 months AND who have/share responsibility for trip planning.

Population Projection of Culinary Travelers

- Three segments of Culinary Travelers, as described on a prior page, were created depending on how strong a factor culinary activities were in planning recent trips. Deliberates, the most committed Culinary Tourists, are projected to equal 12.6 million, representing nearly half of all Culinary Tourists.

Leisure Traveler Population



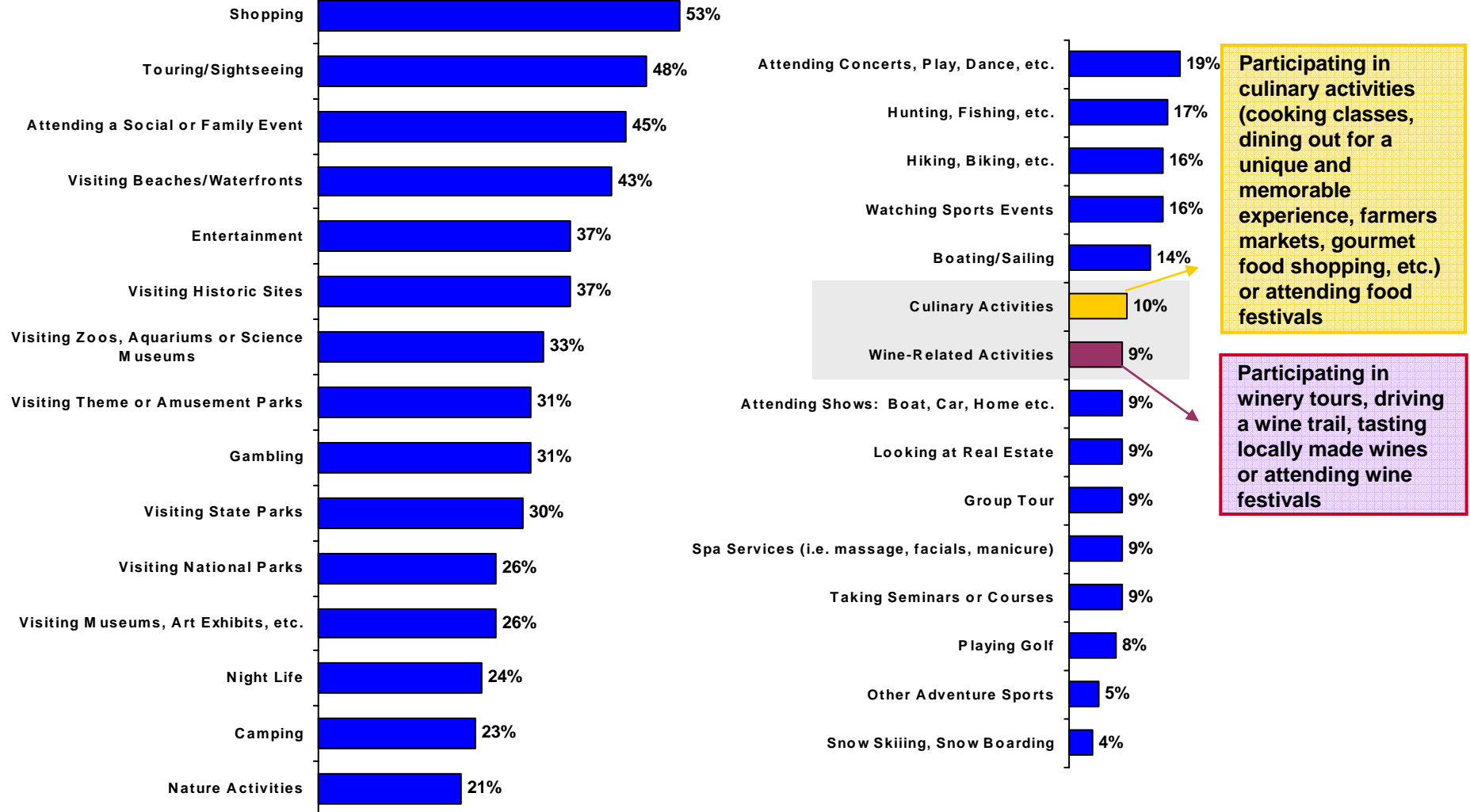
	% of Leisure Travelers	Population Projection (millions)
Culinary Travel/Activities (Total=Food + Wine)		
Deliberate	7.8%	12.6
Opportunistic	4.7%	7.6
Accidental	4.4%	7.1
Total	16.9%	27.3
Food Travel/Activities		
Deliberate	4.8%	7.8
Opportunistic	3.0%	4.9
Accidental	2.3%	3.7
Total	10.1%	16.4
Wine Travel/Activities		
Deliberate	4.1%	6.6
Opportunistic	2.6%	4.2
Accidental	2.7%	4.4
Total	9.4%	15.2

Defining Culinary Travelers

- Ten percent (10%) of leisure travelers report engaging in food-related activities while traveling over the past three years and 9% report engaging in wine-related activities while traveling over the past three years.

Past Trip Activities Over Past 3 Years: Total Leisure Traveler Population

Base: Leisure Travelers n=2364



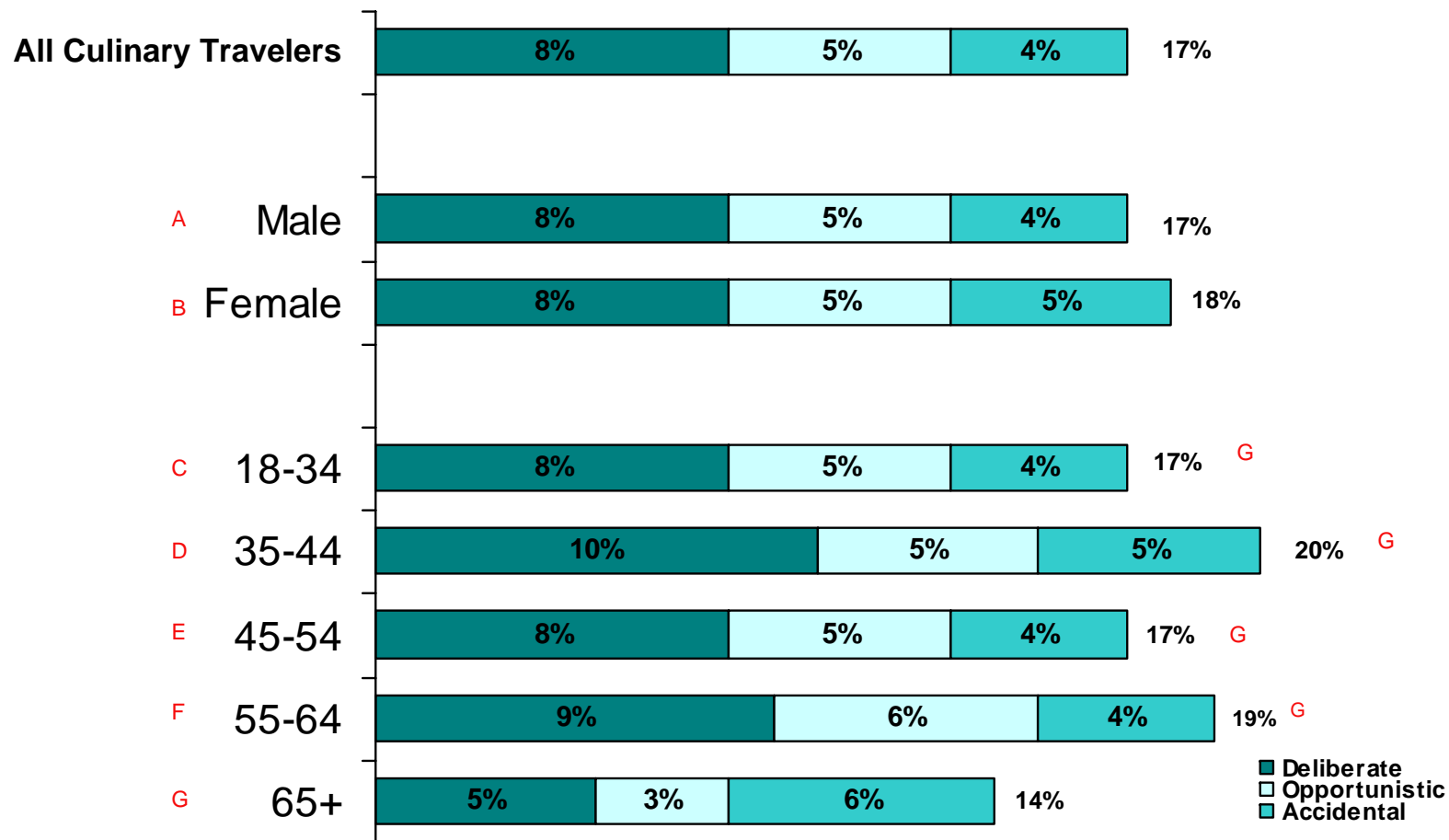
Q5. Thinking of any trips you have taken within the United States over the past three years, please indicate which of the following activities you participated in while on any of those trips.

Incidence of Culinary Travel by Group

- Culinary travel incidence is largely consistent across gender and age groups, although seniors are significantly less likely to have participated in culinary travel.

Culinary Travel Incidence among the Leisure Travel Population

Base: Leisure Travelers n=2364

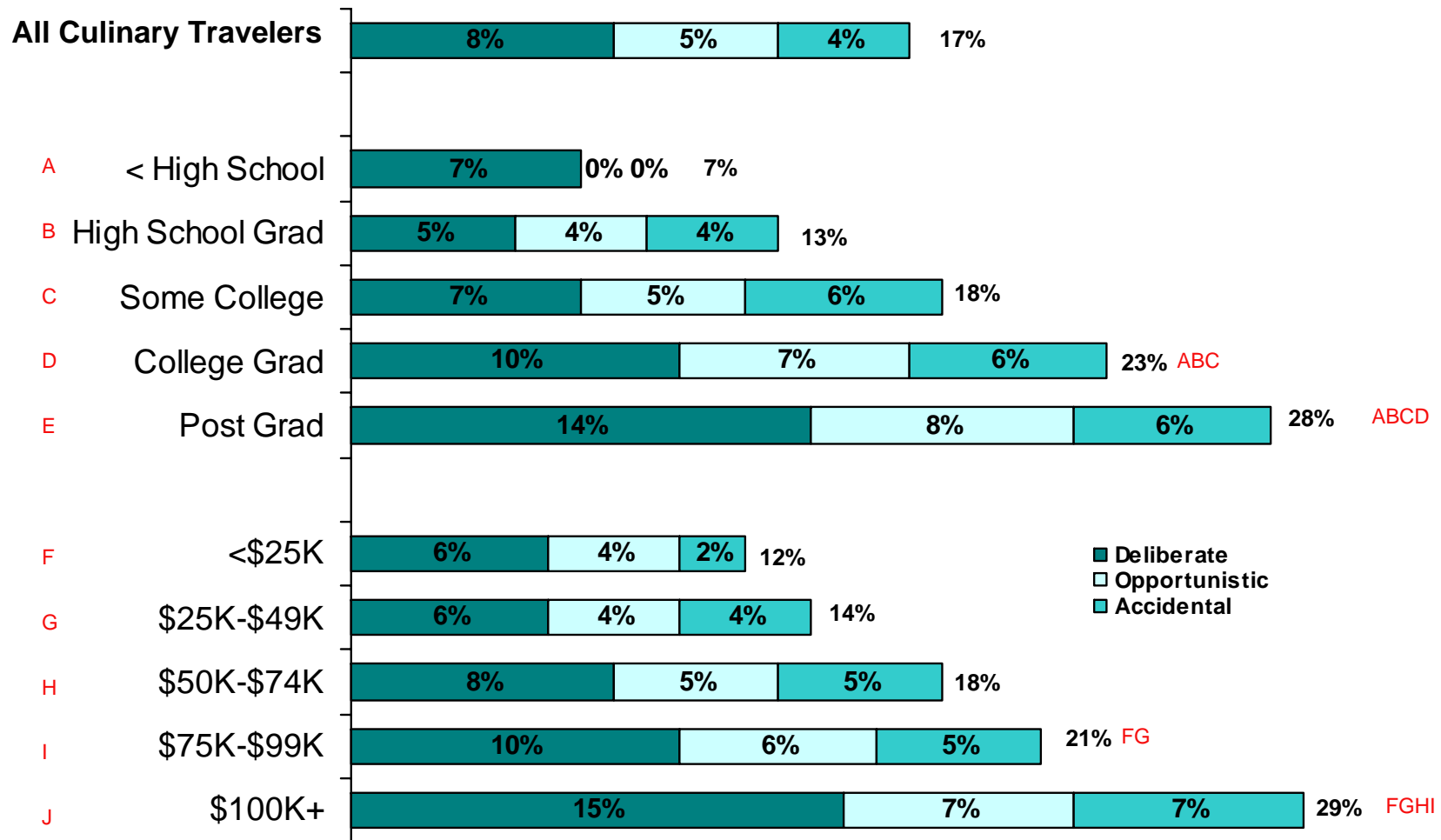


Incidence of Culinary Travel by Group

➤ As education and income increase, so does the likelihood of culinary travel.

Culinary Travel Incidence among the Leisure Travel Population

Base: Leisure Travelers n=2364



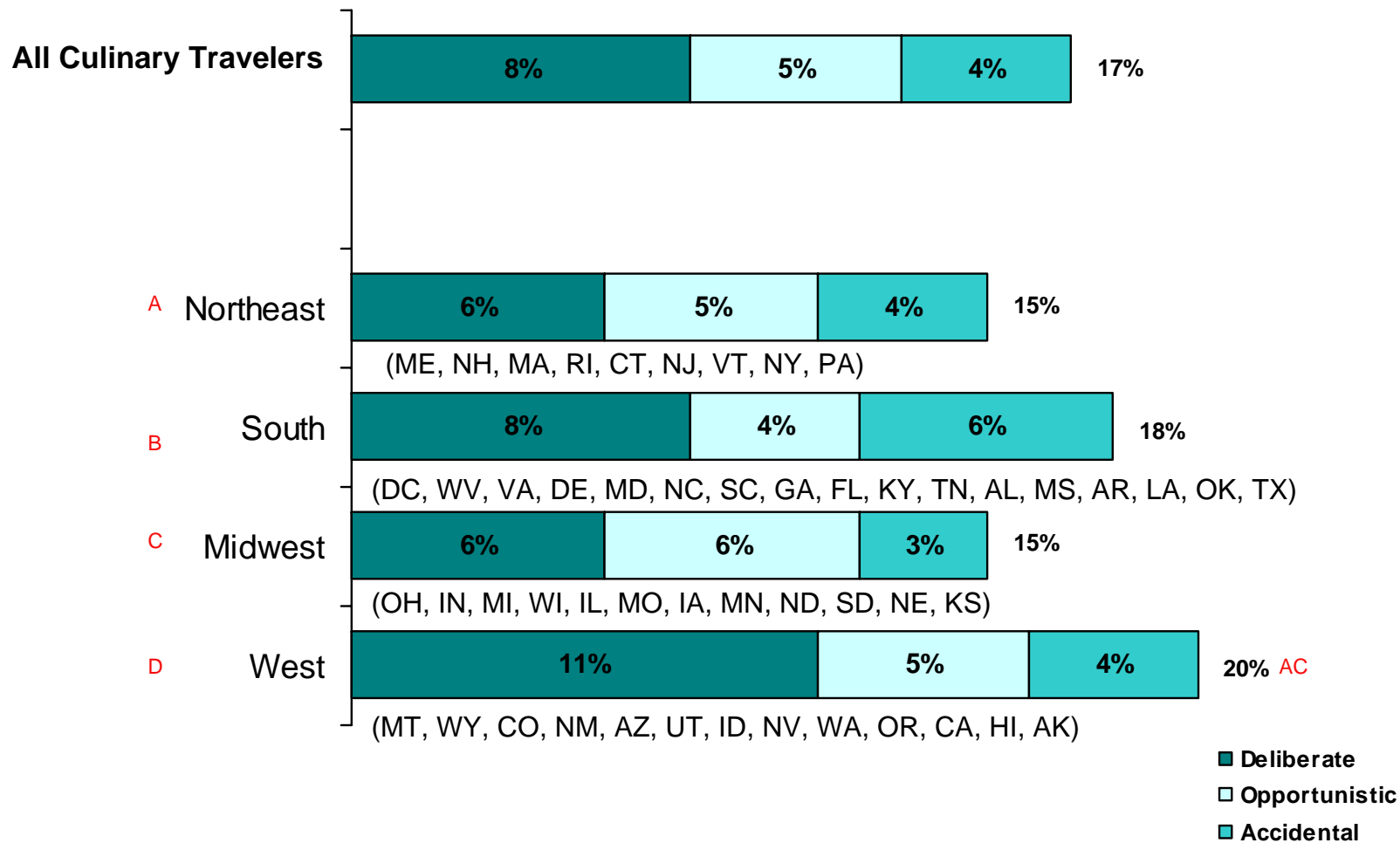
Culinary Traveler Definitions: These overall culinary traveler groups are based on the combined highest level of travel interest indicated for either food or wine-related travel.

Incidence of Culinary Travel by Group

- Culinary travel incidence is highest among leisure travelers who live in the West, and fairly similar in other regions of the country.

Culinary Travel Incidence among the Leisure Travel Population

Base: Leisure Travelers n=2364

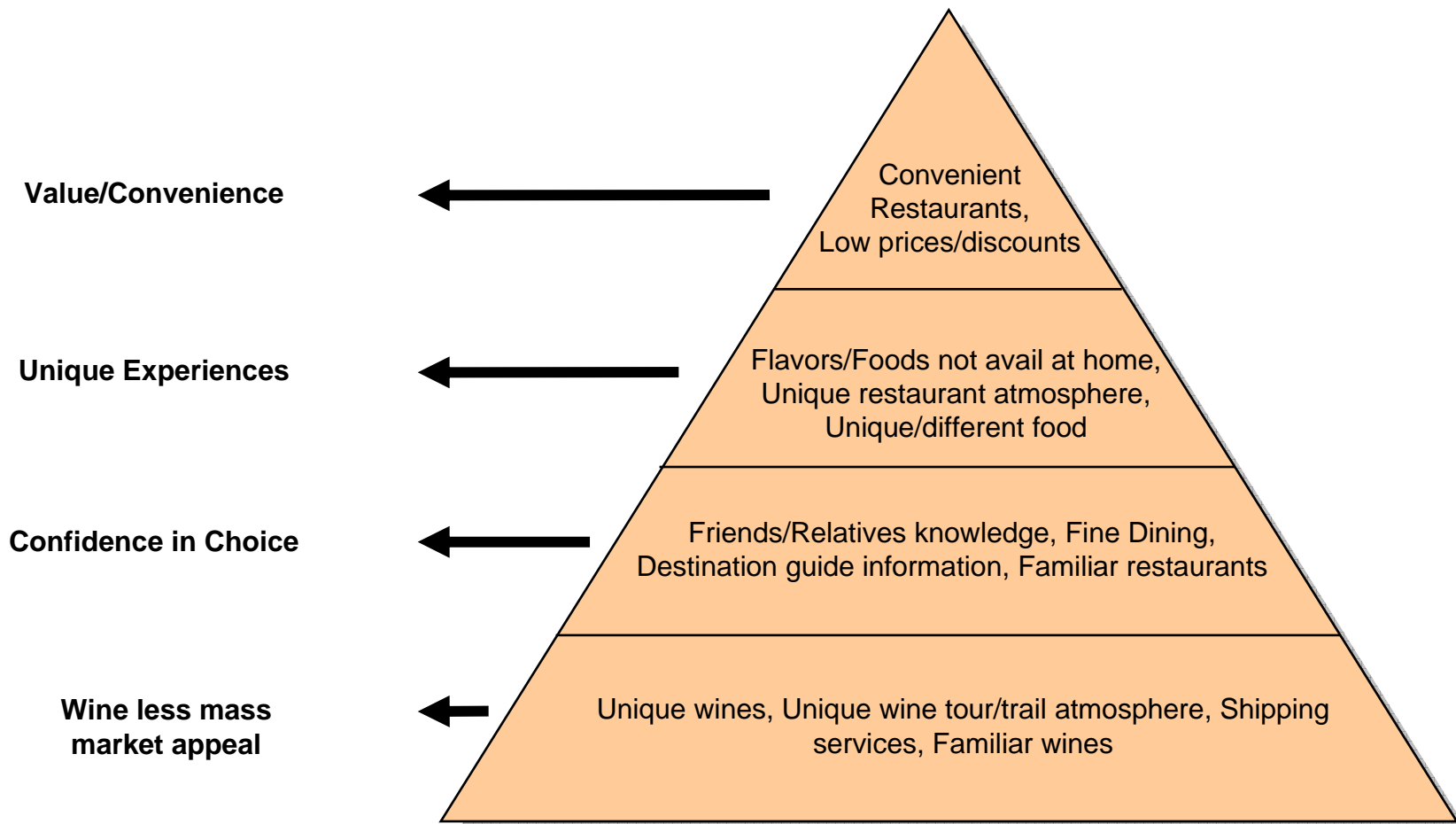


Agreement with Statements about Culinary Travel

- Overall, convenience and reasonable pricing are most important factors when selecting a destination by nearly three-quarters of all leisure travelers.
- Unique experiences fall in the second tier of importance as two-thirds of all leisure travelers indicate they are important.
 - However, this importance ranking changes when looking at Deliberate and Opportunistic Culinary Travelers as illustrated on the next page.

Destination Selection Criteria

Base: Leisure Travelers n=2364



Q53. How important are each of the following factors when selecting a domestic destination for a trip where you plan to engage in culinary or wine-related activities? % total importance (top 2 box).

Importance of Aspects of Culinary Travel

- For Serious Culinary Travelers (Deliberates and Opportunistics) unique and different experiences are the most important factors when selecting a culinary travel destination.
 - Deliberate Travelers seem to be the most discerning of the three groups and consider more of these attributes as important factors in destination choice than do the other groups.

	Total Culinary Travelers <i>Base:</i> 731	Deliberate 374 A	Culinary Travelers Opportunistic 256 B	Accidental 101 C
Can experience flavors/foods that are not available in your area	84%	90% ^{BC}	81%	77%
Food is unique or different	80%	86% ^C	85% ^C	66%
Restaurant atmosphere is unique	76%	82% ^C	76%	66%
Restaurants are easy to get to/or convenient	73%	71%	76%	73%
Low prices/discounts	71%	72%	69%	72%
Destination guides include information on local wines/dining	63%	70% ^C	66% ^C	48%
The availability of fine dining restaurants	61%	67% ^C	58%	54%
Wines are unique or different	54%	65% ^{BC}	51%	39%
Wine tour/trail/winery atmosphere is unique	53%	64% ^{BC}	49%	37%
Have friends/relatives who know the area	48%	48%	54% ^C	42%
Restaurants are familiar to you	33%	32%	30%	38%
The availability of shipping services or mail order for food/wine items	33%	42% ^{BC}	30% ^C	18%
Wines are familiar to you	28%	35% ^{BC}	25%	18%

Q53. How important are each of the following factors when selecting a domestic destination for a trip where you plan to engage in culinary or wine-related activities? % total importance (top 2 box).

Agreement with Statements about Culinary Travel



- Serious Culinary Travelers (Deliberates & Opportunistics) are most interested in trying new and different restaurants and learning about local cultures and cuisines while on a trip to a culinary destination. They also are much more likely than others to spend more on food & drink while traveling, look for regional experiences, and bring food, wine and recipes home to share with others.
- Attitudinally, Serious Culinary Travelers are more similar to each other and significantly differ from Accidental Culinary Travelers.

	Total Culinary Travelers	Culinary Travelers		
		Deliberate	Opportunistic	Accidental
	Base: 731	374 A	256 B	101 C
I like to try different/new restaurants most nights when I travel to experience a range of local cuisines.	81%	85% ^C	83%	73%
I enjoy learning about the local culture and cuisines of the different travel destinations I visit.	81%	86% ^C	83% ^C	69%
I am more inclined to spend more money on food and drink while I am on a trip.	76%	81% ^C	79% ^C	63%
I want my travel to always be "experiential", so I make an effort to try regional cuisines, culinary specialties, local wines/spirits, etc.	67%	79% ^{BC}	69% ^C	42%
I like to bring back regional foods, recipes, wines, etc. from the places I visit and share them with my friends and family.	62%	72% ^C	67% ^C	40%
I visit wineries or participate in wine tours because I want to try wines unique to the destination.	54%	62% ^C	57% ^C	36%
Culinary experiences always have an influence on every trip I take, from deciding on my destination, to choosing which hotel I stay in, to activities I	43%	60% ^{BC}	30%	27%
Food is central to my travel destination selection .	36%	51% ^{BC}	29% ^C	17%
I would choose one travel destination over another based purely on the culinary experiences the destination has to offer	35%	49% ^{BC}	26%	20%
While on a trip, I prefer to select restaurants I am familiar with.	25%	28%	21%	25%

Definitions & Base Sizes (Continued)

For the purposes of this sub-section **only**, we have the following definitions:

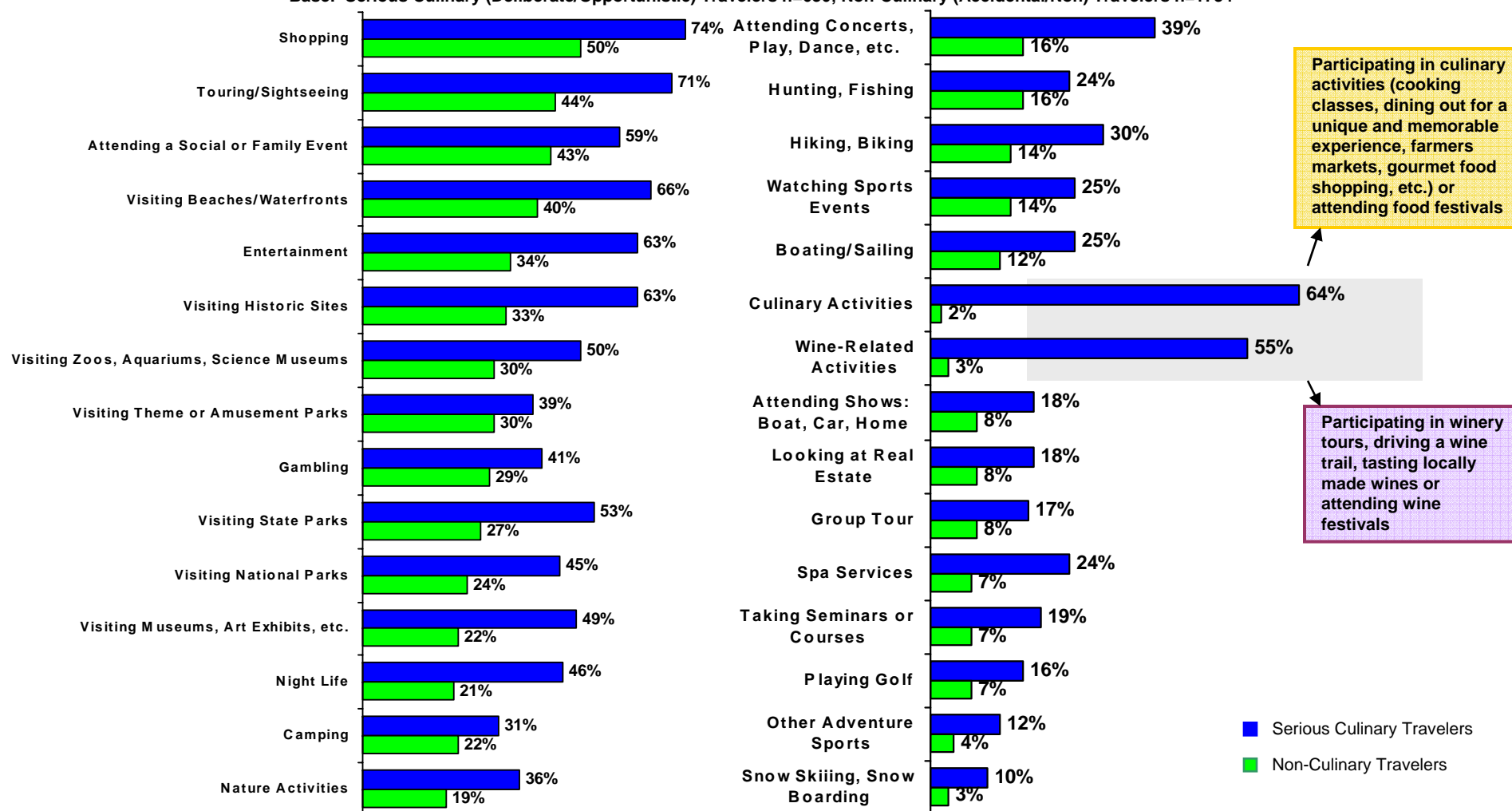
- ✧ **Serious Culinary Travelers:** Leisure travelers who engage in either or both food travel and wine travel on a Deliberate or Opportunistic basis.
 - Sample size = 630
- ✧ **Non-Culinary Travelers:** Leisure travelers who engage in either or both food travel and wine travel on an Accidental basis or leisure travelers who do not participate in either food travel or wine travel.
 - Sample size = 1734

Defining Serious Culinary Travelers

- Serious Culinary Travelers are significantly more likely to have participated in ALL activities listed than the Non-Culinary Traveler.

Trip Activities over Past 3 Years: Total Leisure Traveler Population

Base: Serious Culinary (Deliberate/Opportunistic) Travelers n=630; Non-Culinary (Accidental/Non) Travelers n=1734

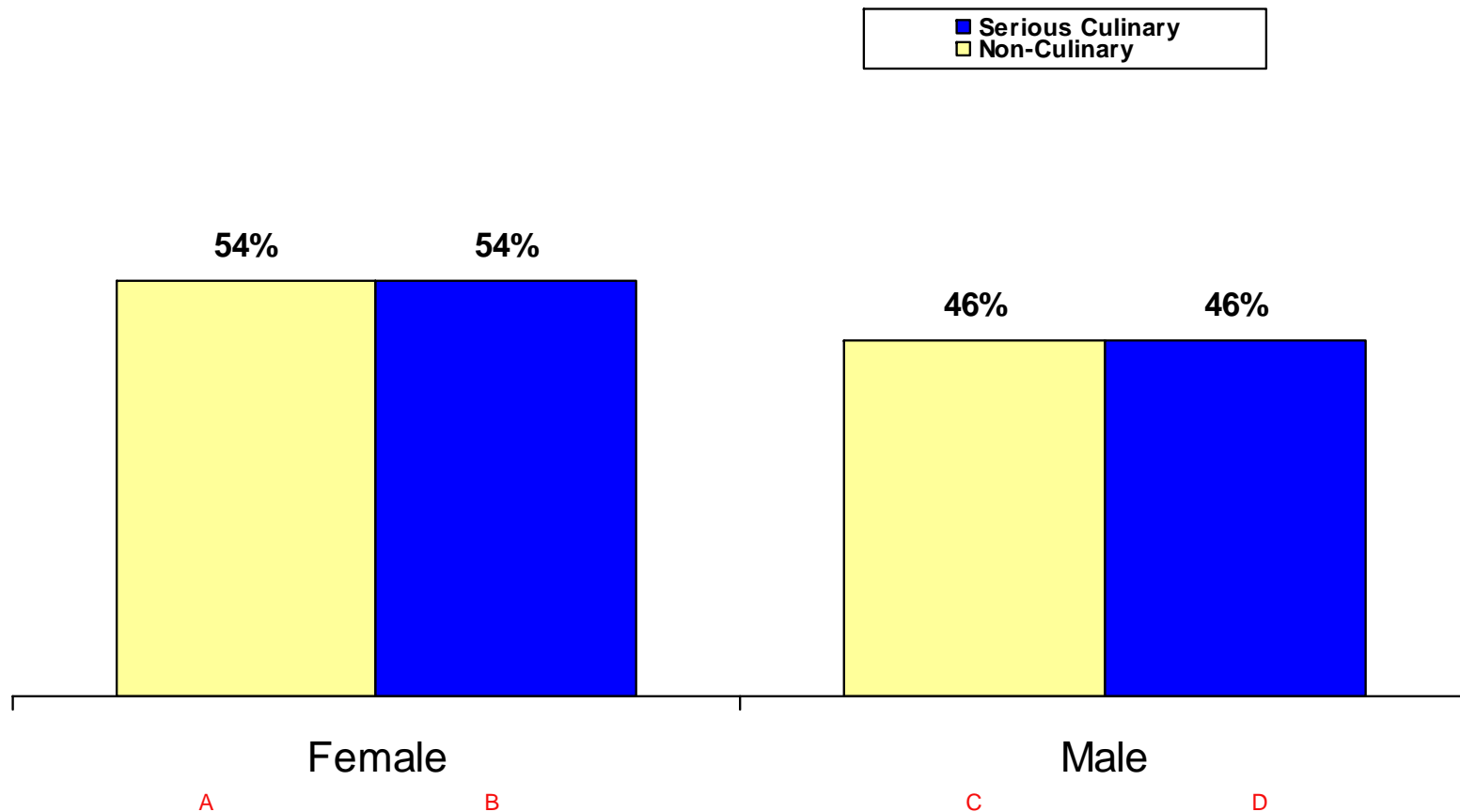


Demographic Breakdown by Group

- There is no significant difference between men and women in the two groups.

Culinary Traveler versus Non-Culinary Traveler among the Leisure Travel Population

Base: Serious Culinary (Deliberate/Opportunistic) Travelers n=630; Non-Culinary (Accidental/Non) Travelers n=1734



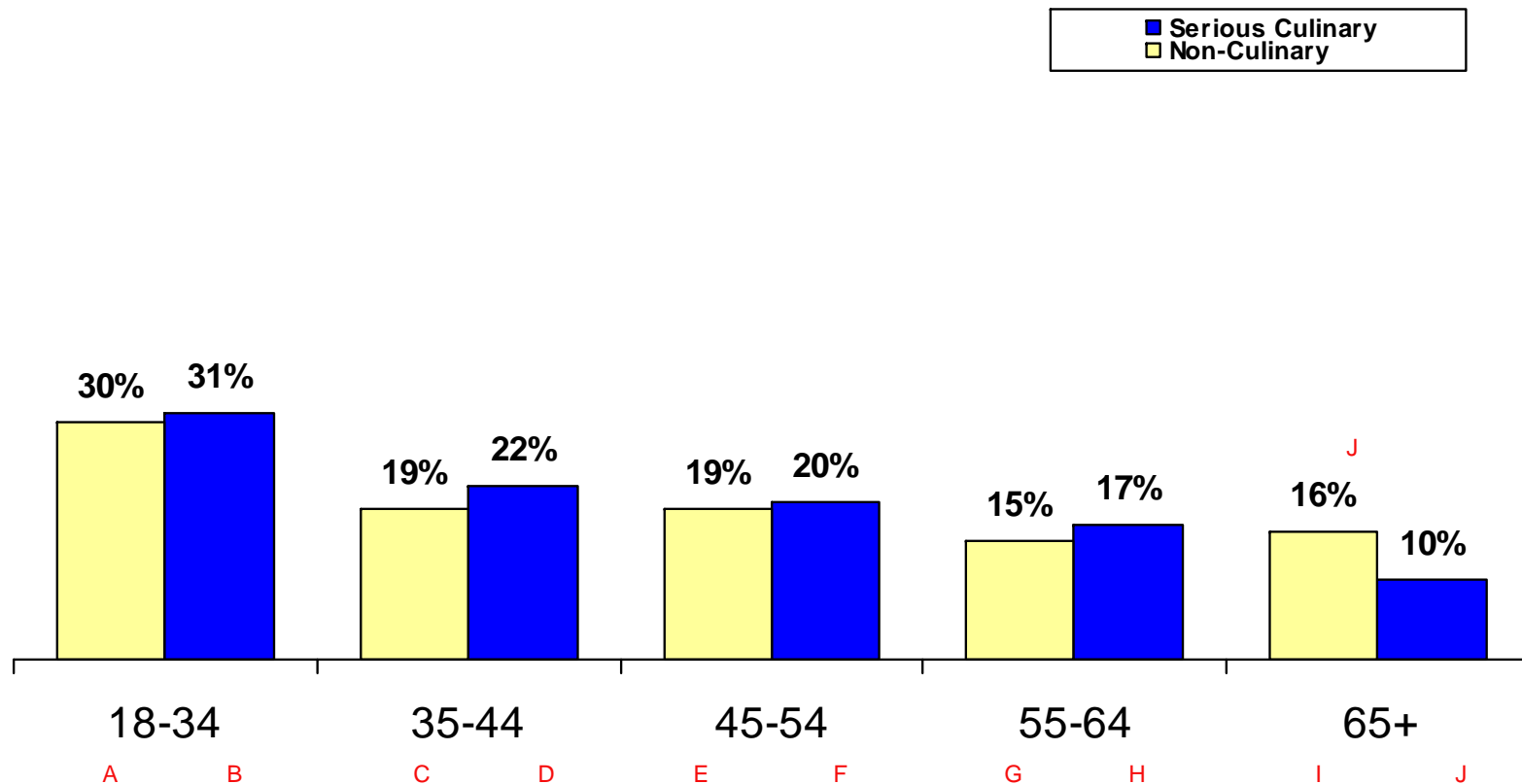
Demographic Breakdown by Group



- Those aged 65 years and older are the least likely to be Serious Culinary Travelers, comprising only 10 percent of the total, as compared to 16 percent of all Non-Culinary Travelers.

Culinary Traveler versus Non-Culinary Traveler among the Leisure Travel Population

Base: Serious Culinary (Deliberate/Opportunistic) Travelers n=630; Non-Culinary (Accidental/Non) Travelers n=1734



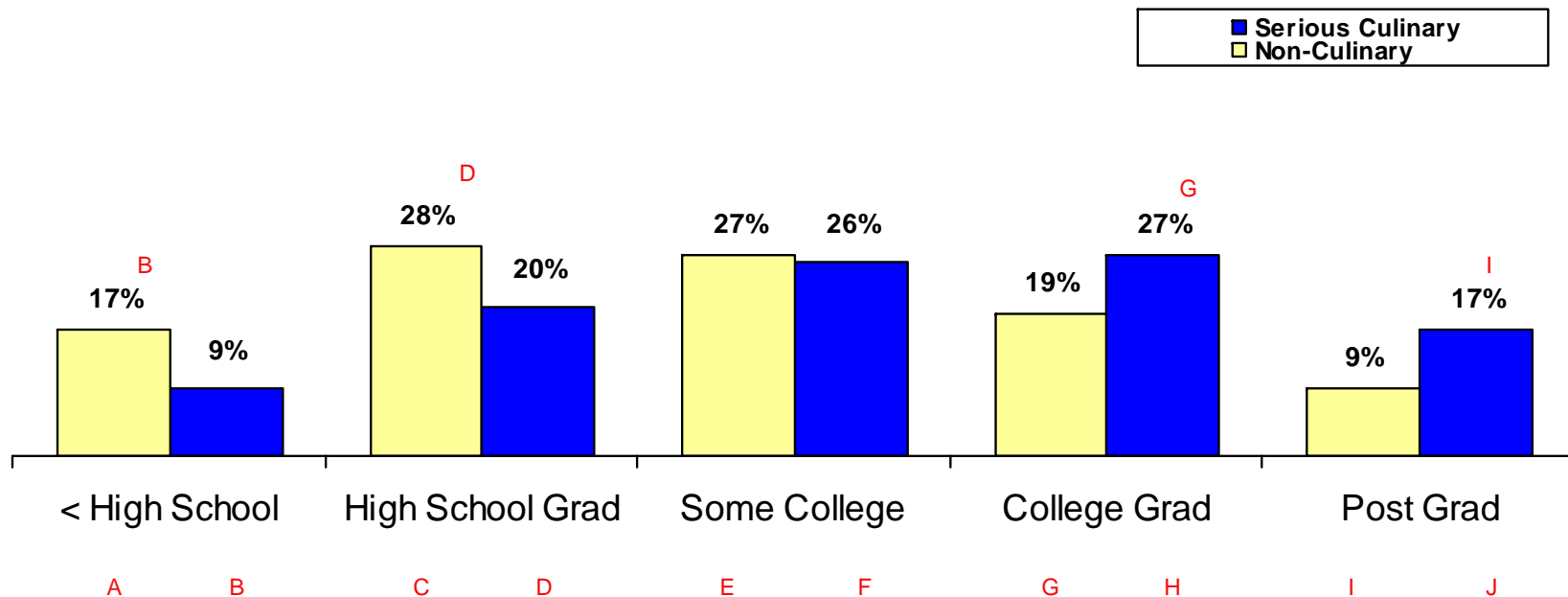
Demographic Breakdown by Group



- Education is positively correlated with culinary travel. Those with college educations or more made up a significantly larger share of Serious Culinary Travelers than they do of Non-Culinary Travelers.

Culinary Traveler versus Non-Culinary Traveler among the Leisure Travel Population

Base: Serious Culinary (Deliberate/Opportunistic) Travelers n=630; Non-Culinary (Accidental/Non) Travelers n=1734



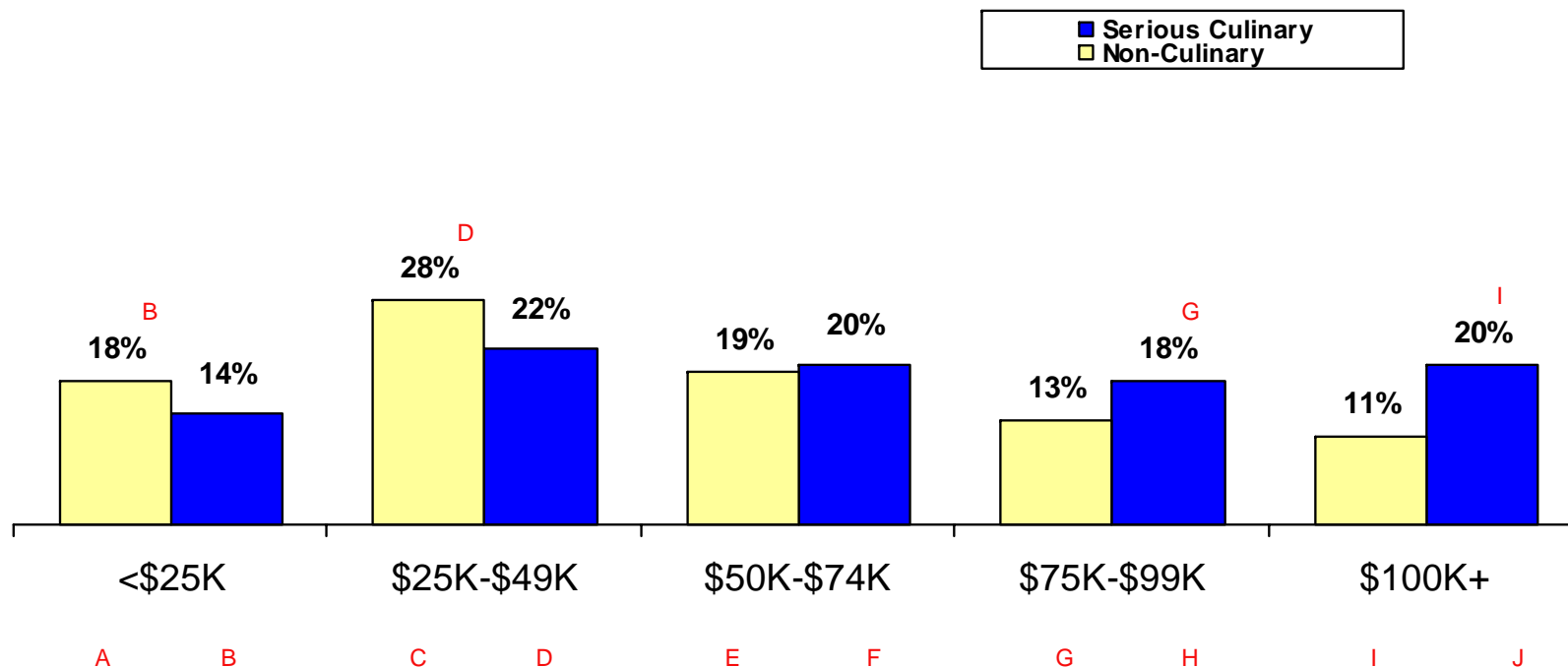
Demographic Breakdown by Group



- The propensity to take culinary trips is also positively related to income. Upper income households represent a significantly larger share of Serious Culinary Travelers than they do of Non-Culinary Travelers.

Culinary Traveler versus Non-Culinary Traveler among the Leisure Travel Population

Base: Serious Culinary (Deliberate/Opportunistic) Travelers n=630; Non-Culinary (Accidental/Non) Travelers n=1734



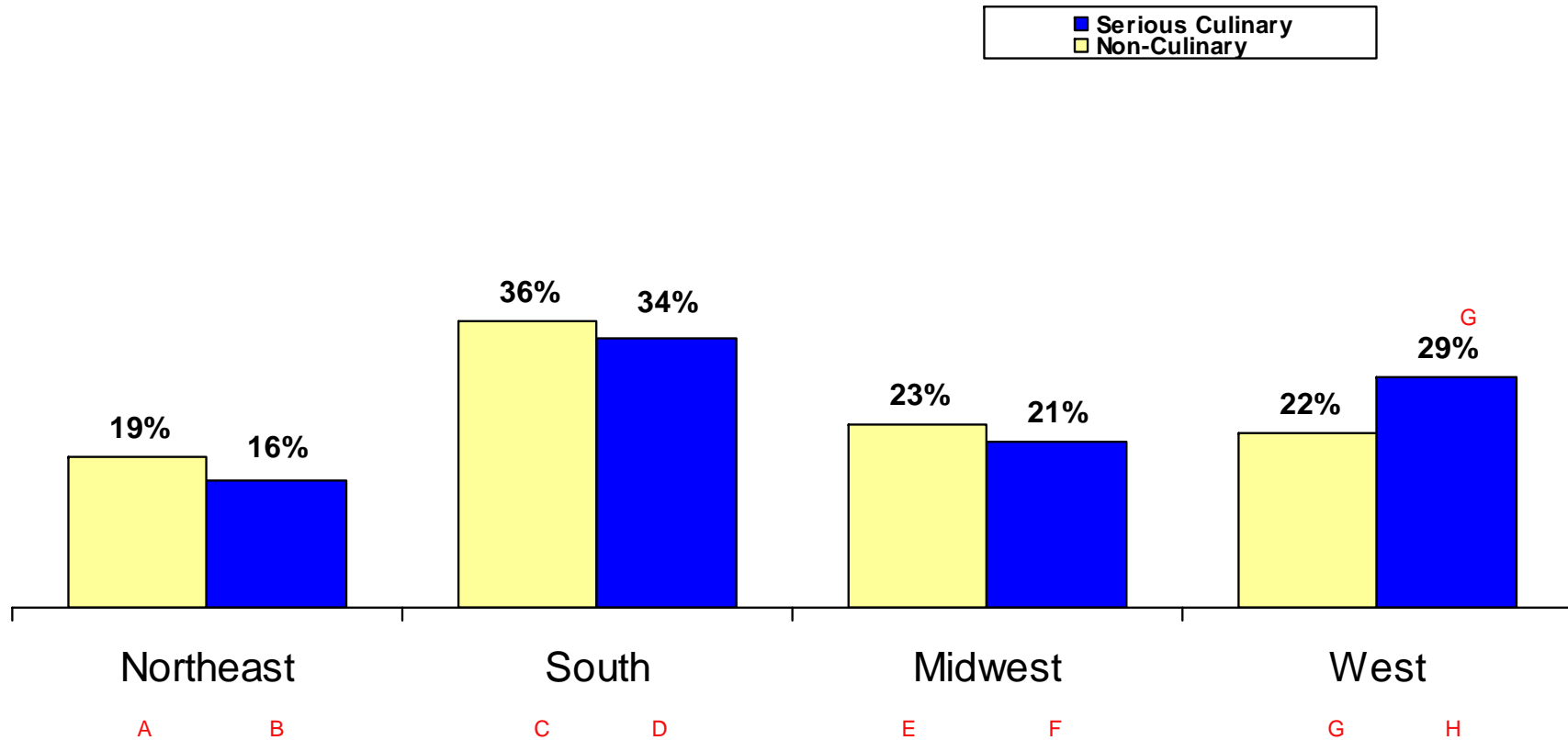
Demographic Breakdown by Group



- Serious Culinary Travelers are much more likely than Non-Culinary Travelers to reside in the western region of the United States.

Culinary Traveler versus Non-Culinary Traveler among the Leisure Travel Population

Base: Serious Culinary (Deliberate/Opportunistic) Travelers n=630; Non-Culinary (Accidental/Non) Travelers n=1734

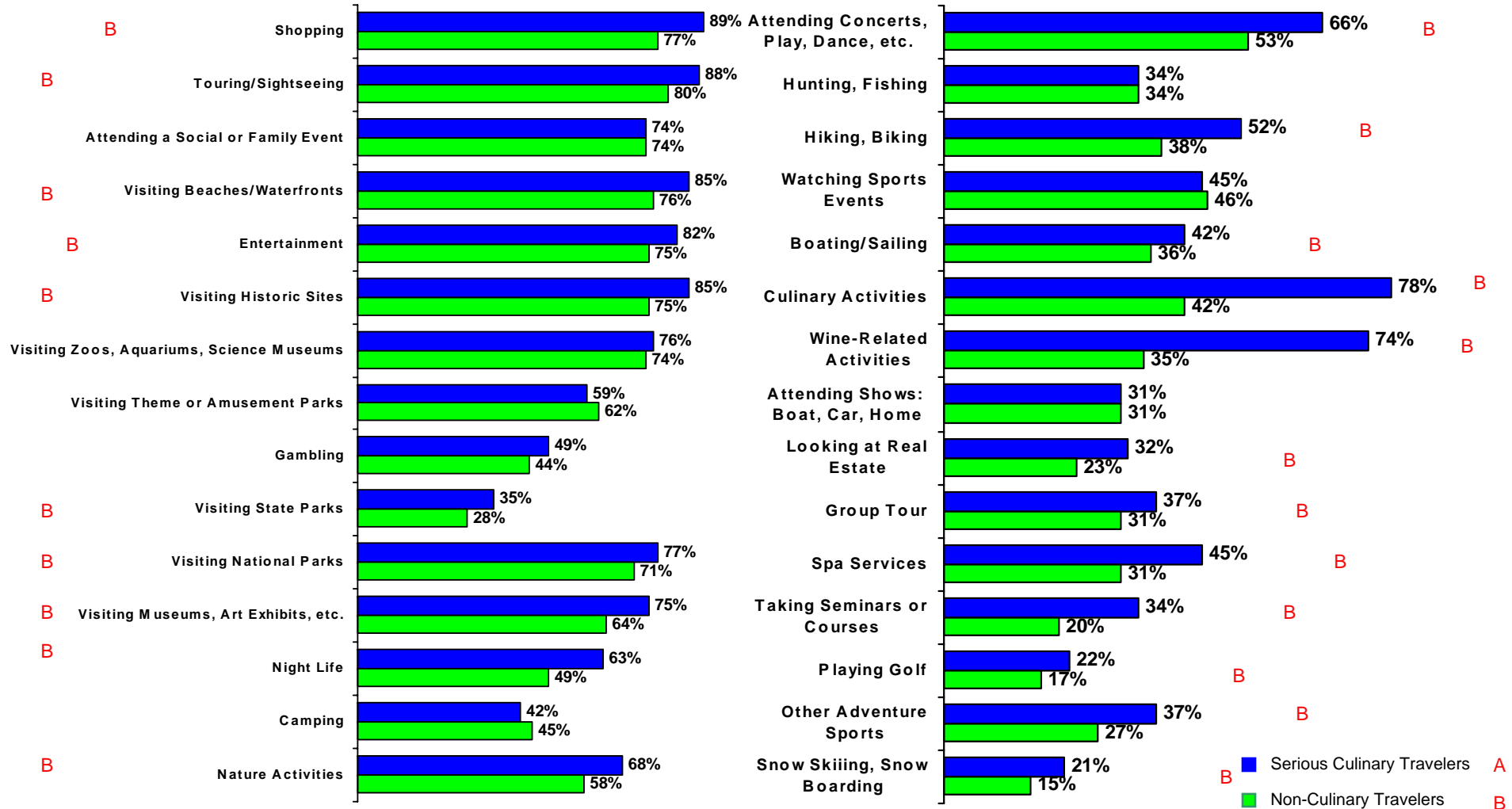


Likelihood of Future Traveling Activities

- Serious Culinary Travelers are significantly more likely than the Non-Culinary Travelers to indicate future participation in many activities including visiting museums and parks.

Likelihood of Future Trip Activities: Total Leisure Traveler Population (Very/Somewhat Likely)

Base: Serious Culinary (Deliberate/Opportunistic) Travelers n=630; Non-Culinary (Accidental/Non) Travelers n=1734

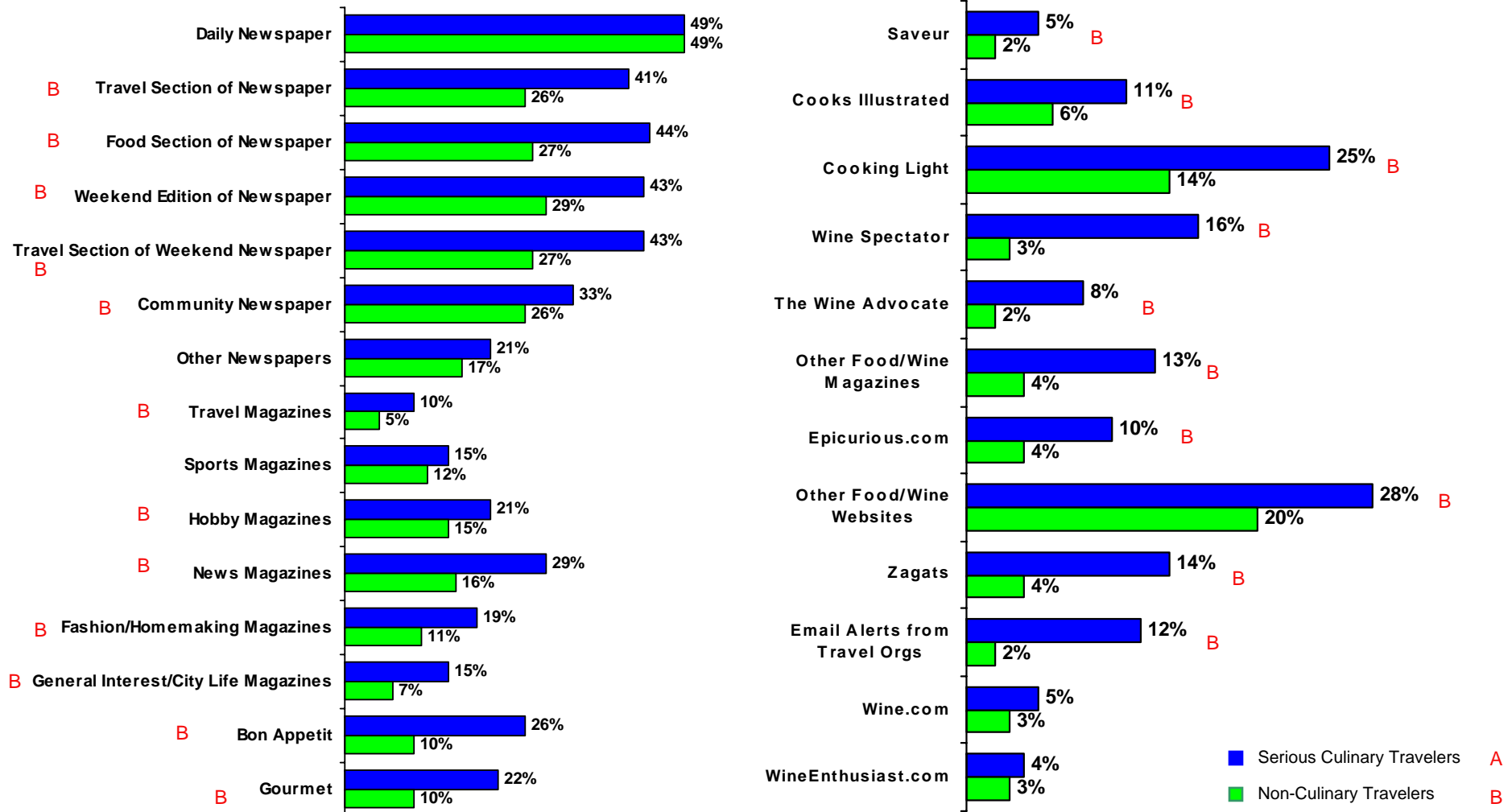


Publications Typically Read

- Serious Culinary Travelers are significantly more likely than Non-Culinary Travelers to read almost all of the publications tested.

Publications Typically Read: Total Leisure Traveler Population

Base: Serious Culinary (Deliberate/Opportunistic) Travelers n=630; Non-Culinary (Accidental/Non) Travelers n=1734





Food Travel

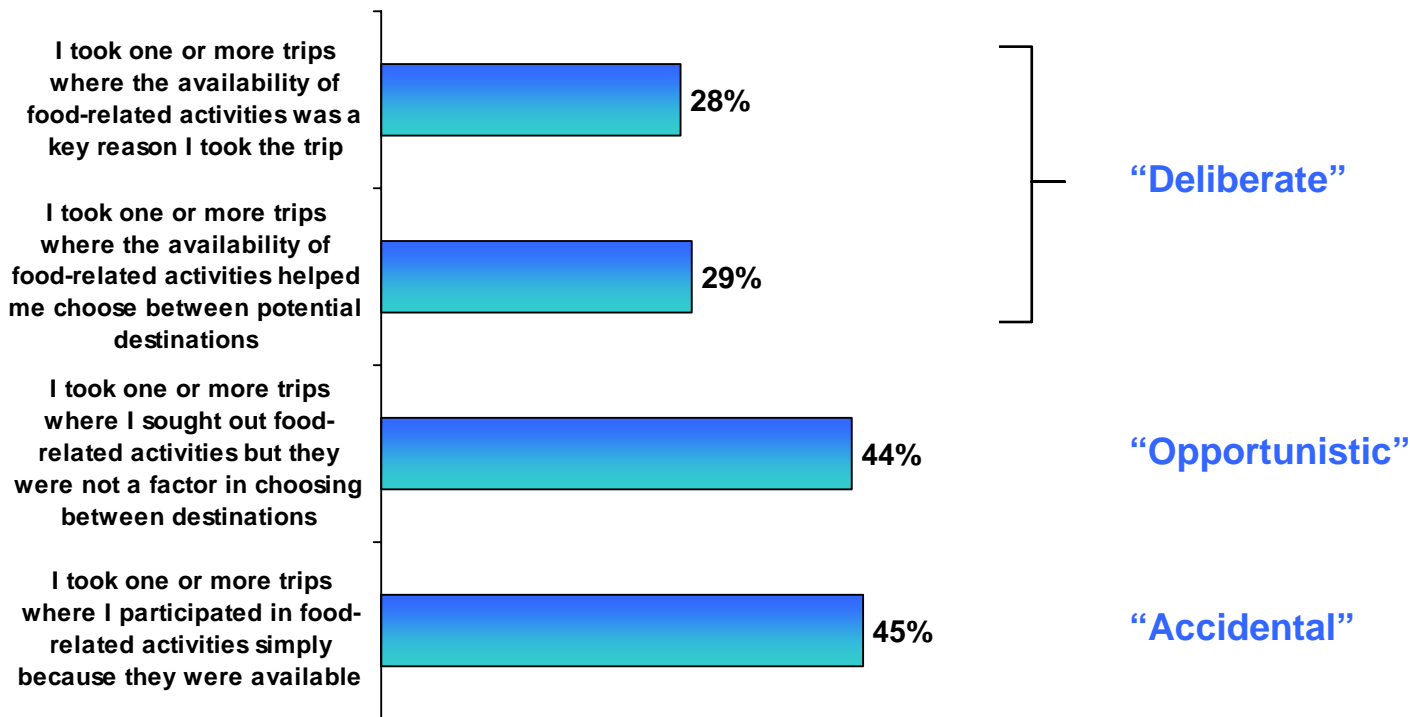
Engage in culinary-related activities, i.e. cooking classes, dining out for a unique and memorable experience, farmers markets, gourmet food shopping, food festivals, etc.

Interest and Participation in Food Travel

- As stated earlier, ten percent of the total population of leisure travelers have participated in food-related activities while on a trip in the past three years.
- When thinking about all of their food-related trips in the past three years, Food Travelers were asked to indicate which statement(s) described their travel decision making.
 - Approximately thirty percent report their food-related activities were a key reason for at least one trip, and thirty percent report the availability of food-related activities helped them choose between destinations.

Food Traveler Interest by Segment among the Food Travel Population

Base: Food Travelers n=451, segments not mutually exclusive on this chart



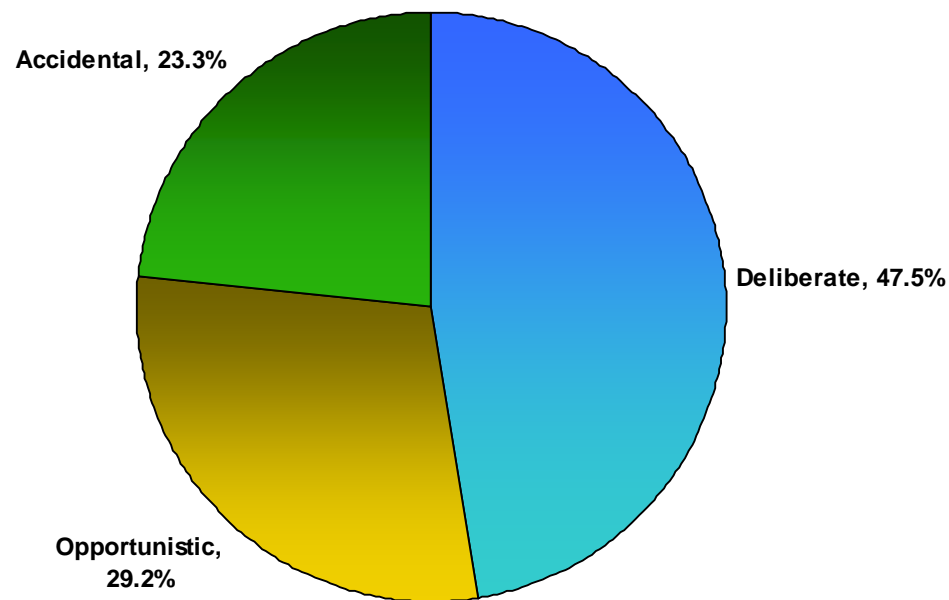
- Q5. Thinking of any trips you have taken within the United States over the past three years, please indicate which of the following activities you participated in while on any of those trips.
- Q6. Thinking about all the trips you have taken over the past three (3) years in which you participated in culinary activities (cooking classes, dining out for a unique and memorable experience, farmers markets, gourmet food shopping, etc.) or attended food festivals, which if any, of the following applies to you? **Multiple responses accepted – Deliberate, Opportunistic & Accidental groups are not mutually exclusive on this chart.**

Influence of Food Travel on Trips Taken

- When respondents were classified into a single segment based on their highest level of interest in food tourism, about half of all Food Travelers (4.8% of the total population of leisure travelers) qualified as a Deliberate Food Traveler.
- Although the remaining half of respondents indicated food-related activities did not influence their destination choice, approximately 30% actively sought out food-related activities while on a past trip, and 23% participated in food-related activities simply because they were available (2.9% and 2.3% of the total population of leisure travelers, respectively).

Food Traveler Distribution

Base: Food Travelers n=451



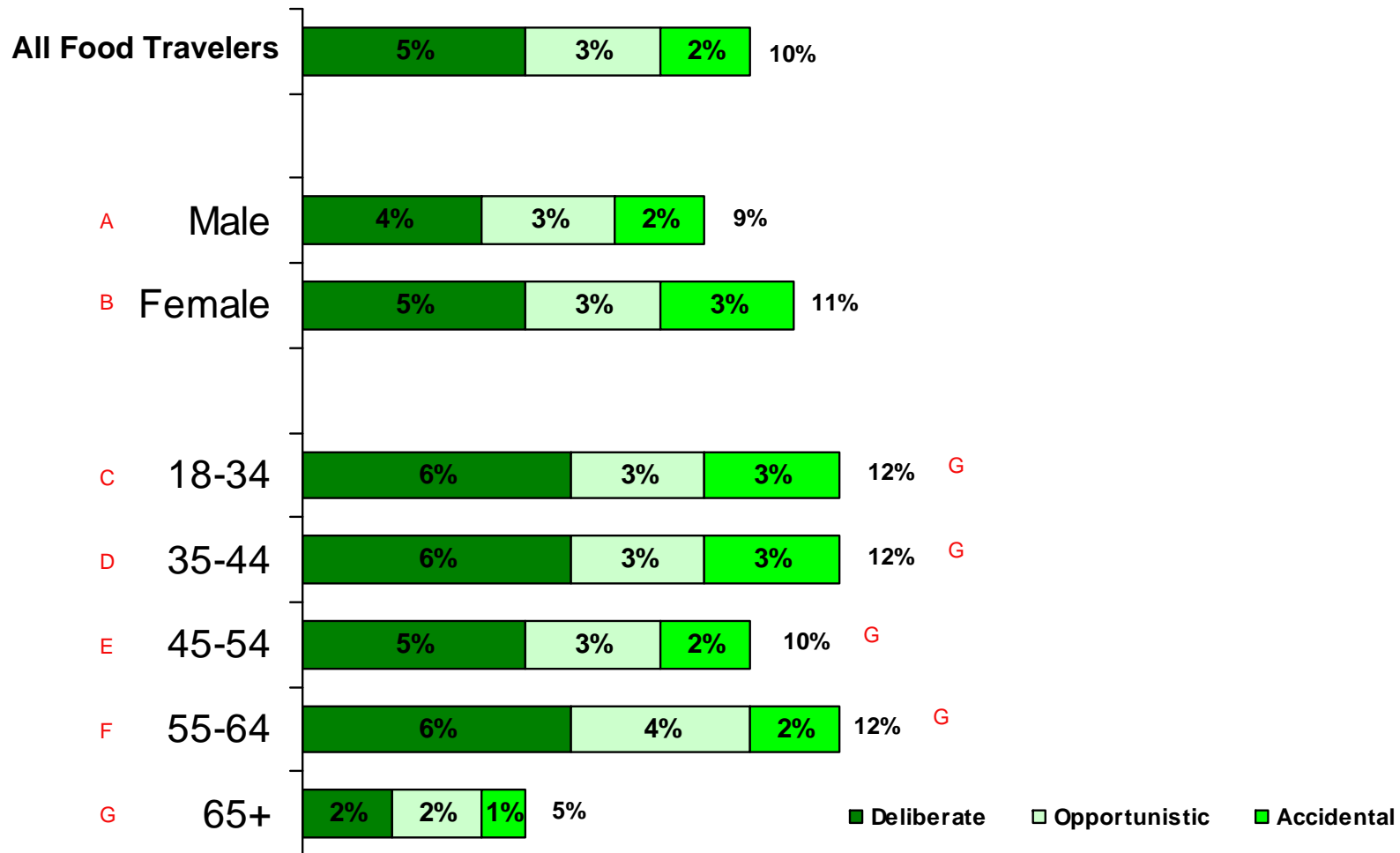
Q6. Thinking about all the trips you have taken over the past three (3) years in which you participated in culinary activities (cooking classes, dining out for a unique and memorable experience, farmers markets, gourmet food shopping, etc.) or attended food festivals, which if any, of the following applies to you? **Mutually exclusive groups, with classification based on respondent's highest level of interest in culinary tourism.**

Incidence of Food Travel by Group

- Reported Food Traveler incidence is similar across gender and age groups, although it is much less common among mature travelers.

Food Travel Incidence among the Leisure Travel Population

Base: Leisure Travelers n=2364

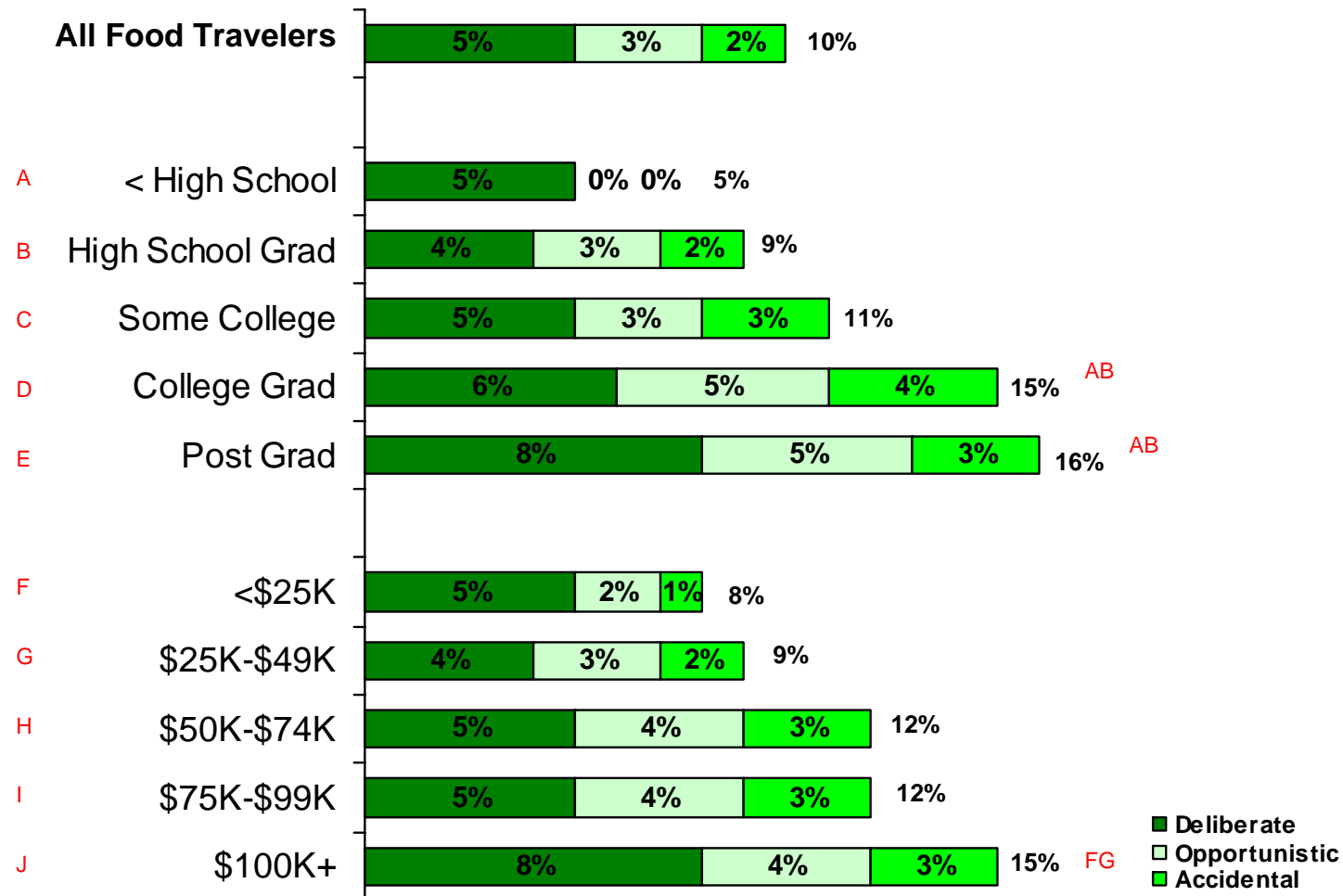


Incidence of Food Travel by Group

➤ Food Traveler incidence is highest among those with higher education and higher incomes.

Food Travel Incidence among the Leisure Travel Population

Base: Leisure Travelers n=2364



Incidence of Food Travel by Group

- Food Traveler incidence does not vary significantly across regions in which travelers reside.



Trip Locations of Past Food Travel

- California and Florida dominate as destinations for food-related travel, with New York and Texas following. For about half of these Food Travelers their most recent trip was to a repeat destination.

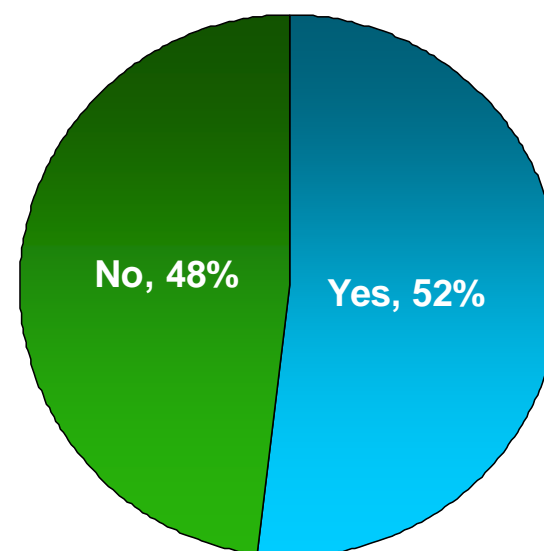
Location of Last Food-Related Trip

Base: Food Travelers n=451

California	14%	Wisconsin	2%
Florida	10%	Tennessee	2%
New York	7%	South Carolina	2%
Texas	6%	Minnesota	2%
North Carolina	4%	Massachusetts	2%
Georgia	4%	Maine	1%
Louisiana	3%	Delaware	1%
Illinois	3%	Mississippi	1%
Nevada	3%	Connecticut	1%
Pennsylvania	3%	Maryland	1%
Washington	3%	New Jersey	1%
Hawaii	3%	New Mexico	1%
Michigan	2%	Utah	1%
Arizona	2%	Kentucky	1%
Virginia	2%	Alabama	1%
Colorado	2%	Idaho State	1%
Ohio	2%	Arkansas	1%
Oregon	2%	West Virginia	1%

Previously Participated in Food-Related Activities in Location

Base: Food Travelers n=451

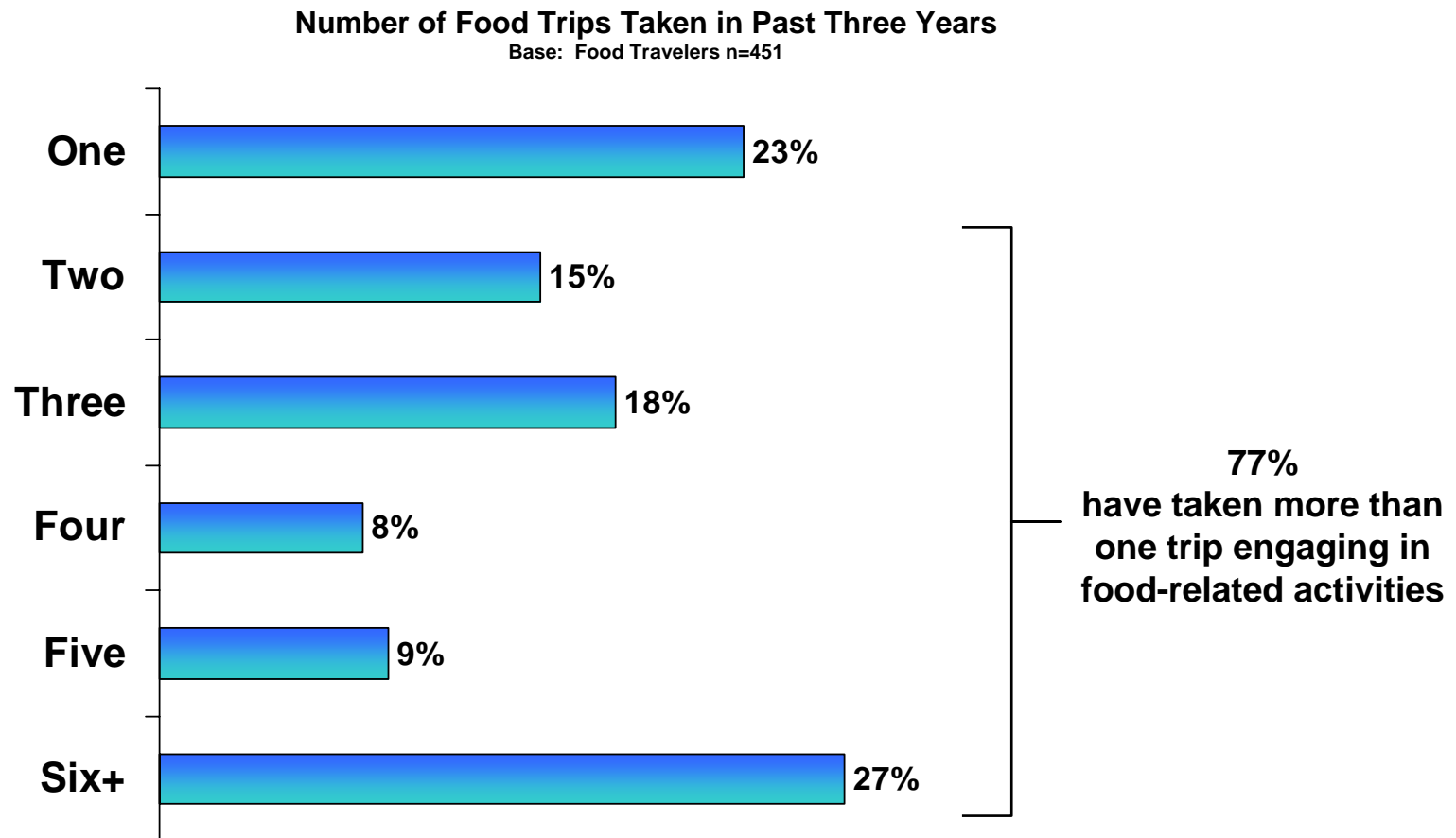


Not applicable; Region only mentions 3%; All other states received less than a 1% mention for each

Q7. What was the location of the most recent trip you took in which you participated in culinary activities (cooking classes, dining out for an unique and memorable experience, farmers markets, gourmet food shopping, food festivals, etc.)? Q8. Prior to your trip, had you participated in culinary activities in this region previously?

Number of Food Trips Taken in Past Three Years

- The majority (77%) of Food Travelers have taken more than one trip during the past three years in which they engaged in food-related activities. Just over one-quarter (27%) report they have taken six or more trips.



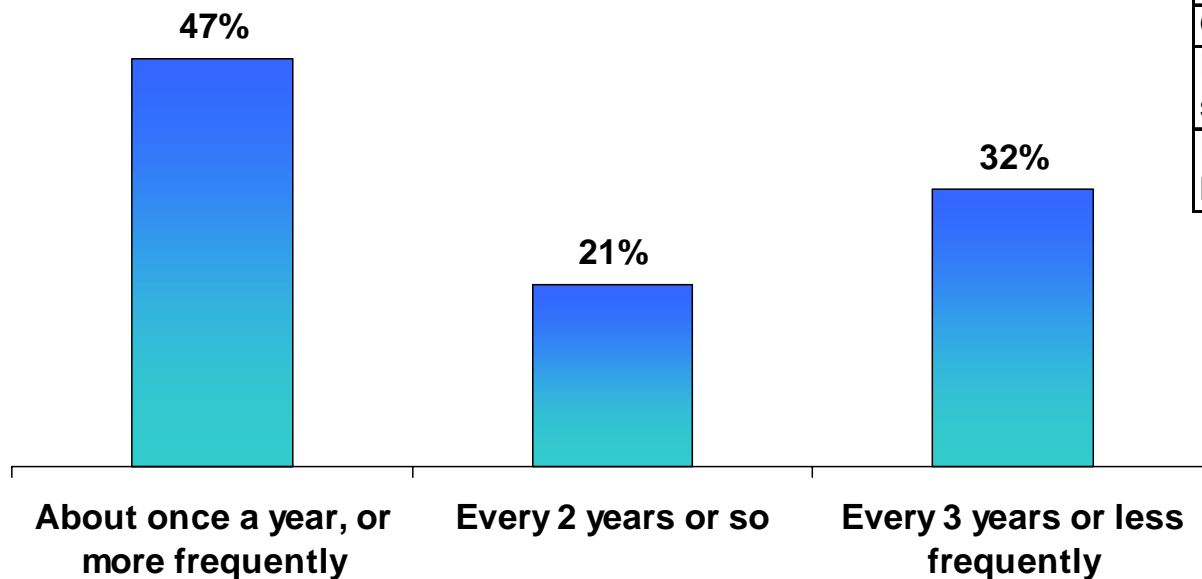
Frequency of Trips Where Food and Drink Are Key Drivers



- About half of Food Travelers overall take one or more trips per year where food and drink are the key drivers. Deliberate Food Travelers are much more likely to be taking these trips once or more per year (65% once a year+), while Accidental Food Travelers take these trips less often (63% every three years or less).

Frequency of Taking Trips Where Food and Drink Are Key Drivers

Base: Food Travelers n=451



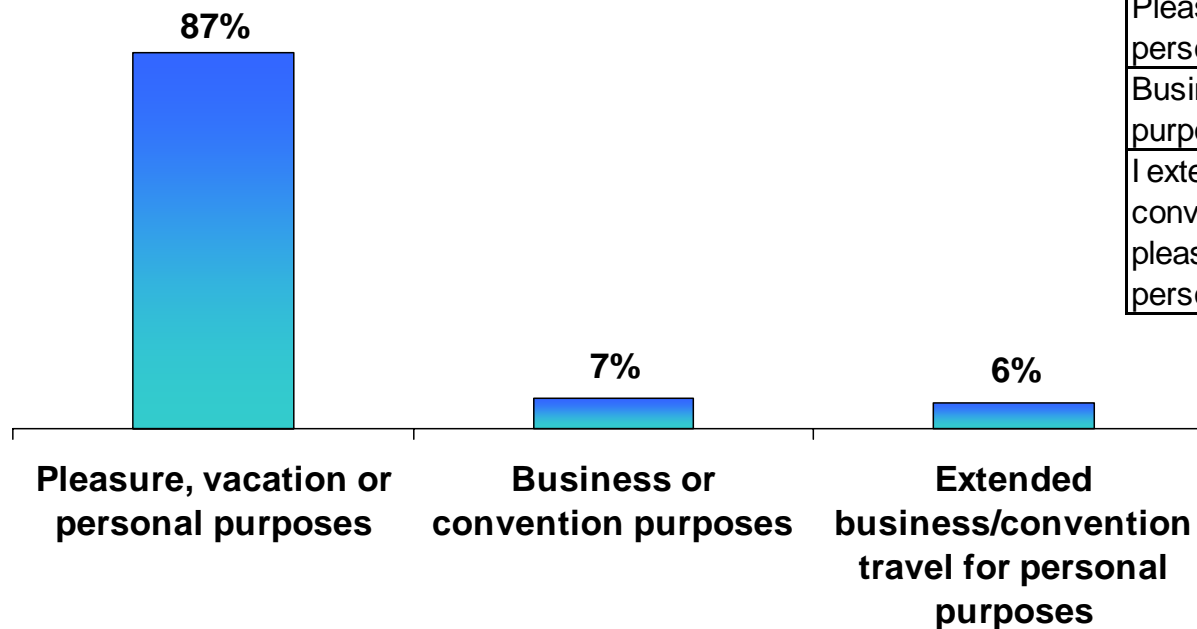
	Delib	Opp	Acc
	A	B	C
Sample Size	(211)	(179)	(61)
Once a year+	65% ^{BC}	38% ^C	20%
Every 2 years or so	23%	22%	18%
Every 3 years or less	12%	39% ^A	63% ^{AB}

Nature of Most Recent Food Trip

- The overwhelming majority of Food Travelers (87%) took their most recent food trip for pleasure, vacation or personal purposes.

Nature of Most Recent Food Trip

Base: Food Travelers n=451



	Delib	Opp	Acc
	A	B	C
Sample Size	(211)	(179)	(61)
Pleasure, vacation or personal purposes	84%	88%	92%
Business or convention purposes	6%	7%	8%
I extended business or convention travel for pleasure, vacation or personal purposes	10%	5%	0%



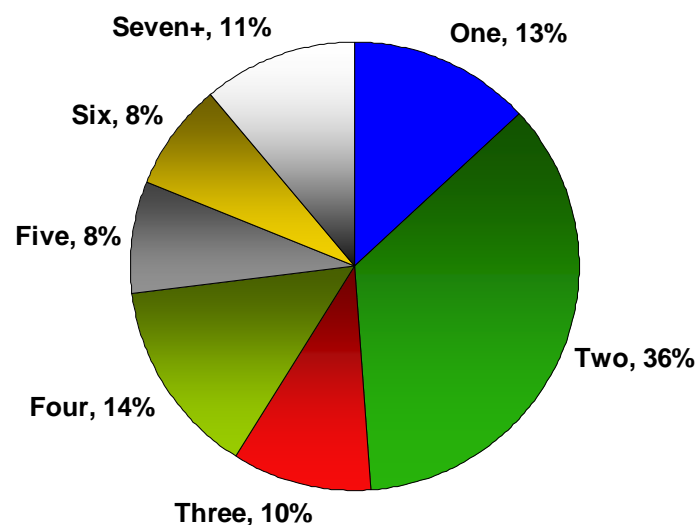
Travel Industry Association

Travel Party on Most Recent Food Trip

- Size of travel party varies, although two people is the most common. Most Food Travelers (87%) took their most recent trip with someone, and by far the most common travel companion is a spouse/significant other.
 - While most of the findings are consistent across groups, Accidental Food Travelers are more likely to have traveled with children under 18.

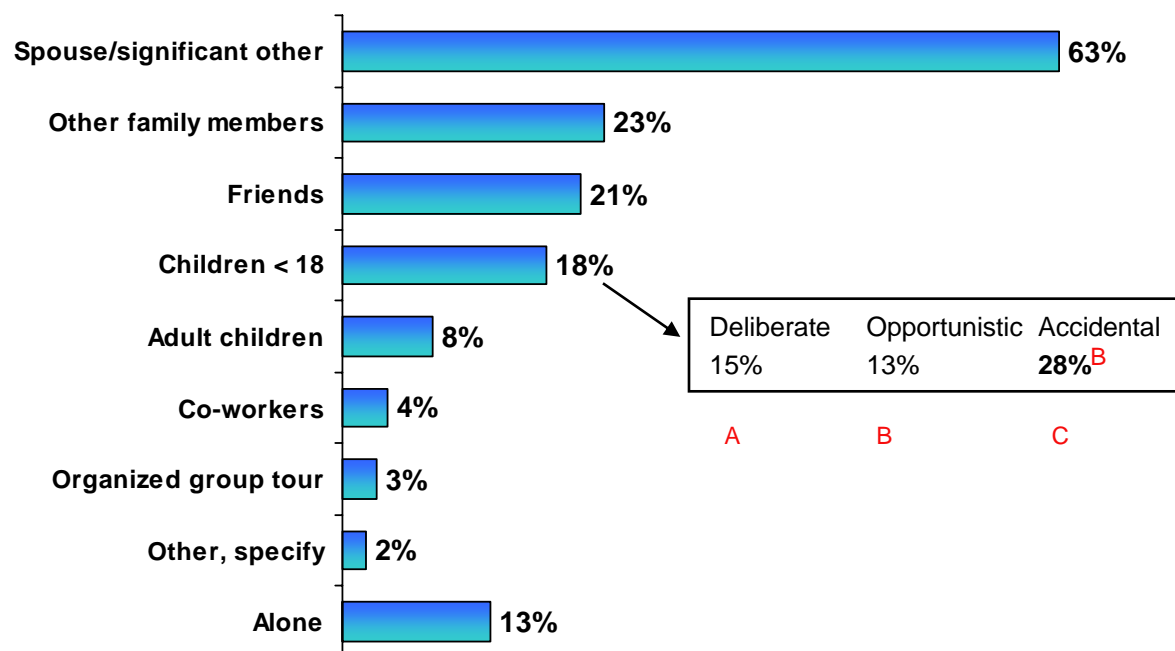
Travel Party Size

Base: Food Travelers n=451



Travel Party Composition

Base: Food Travelers n=451



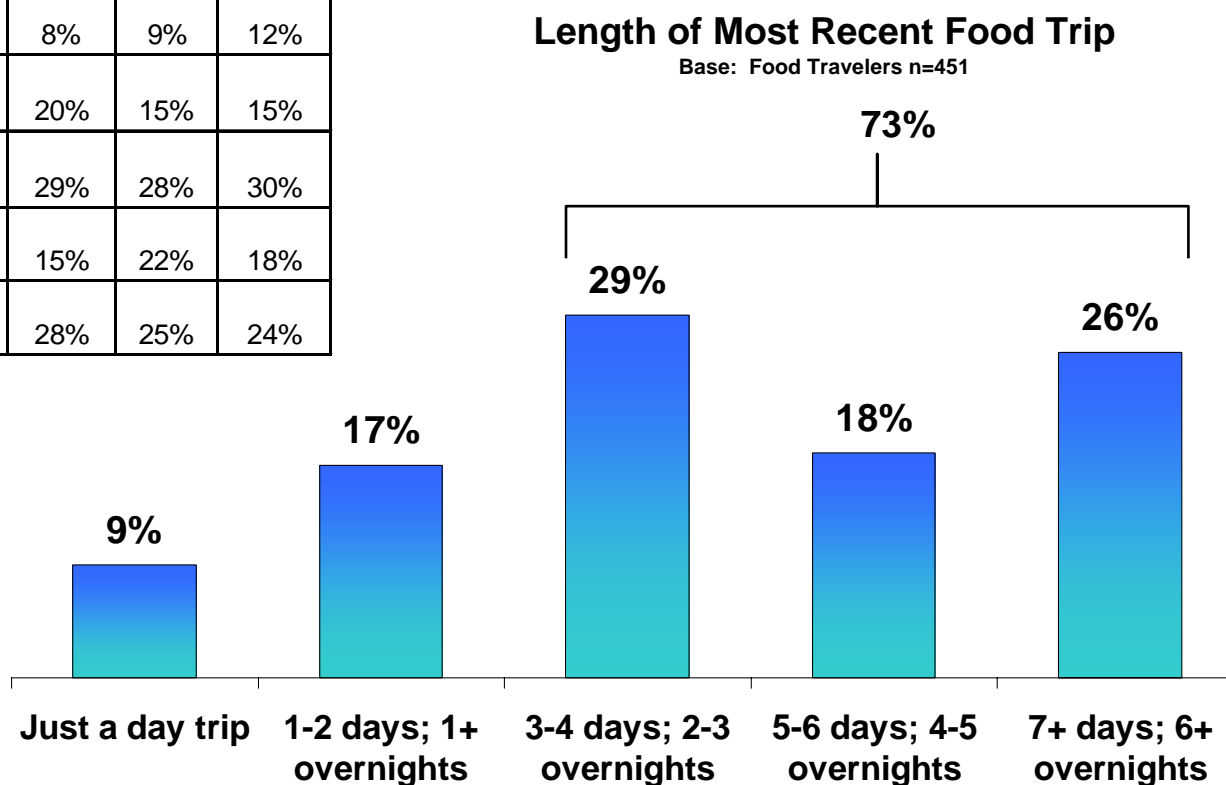
Q12b. And, including yourself, how many people were in your travel party on this trip? Please include people from your household and friends/family who accompanied you but not those whom you met as part of a tour group.

Q12. And, with whom did you travel on this trip? Please select all that apply.

Length of Most Recent Food Trip

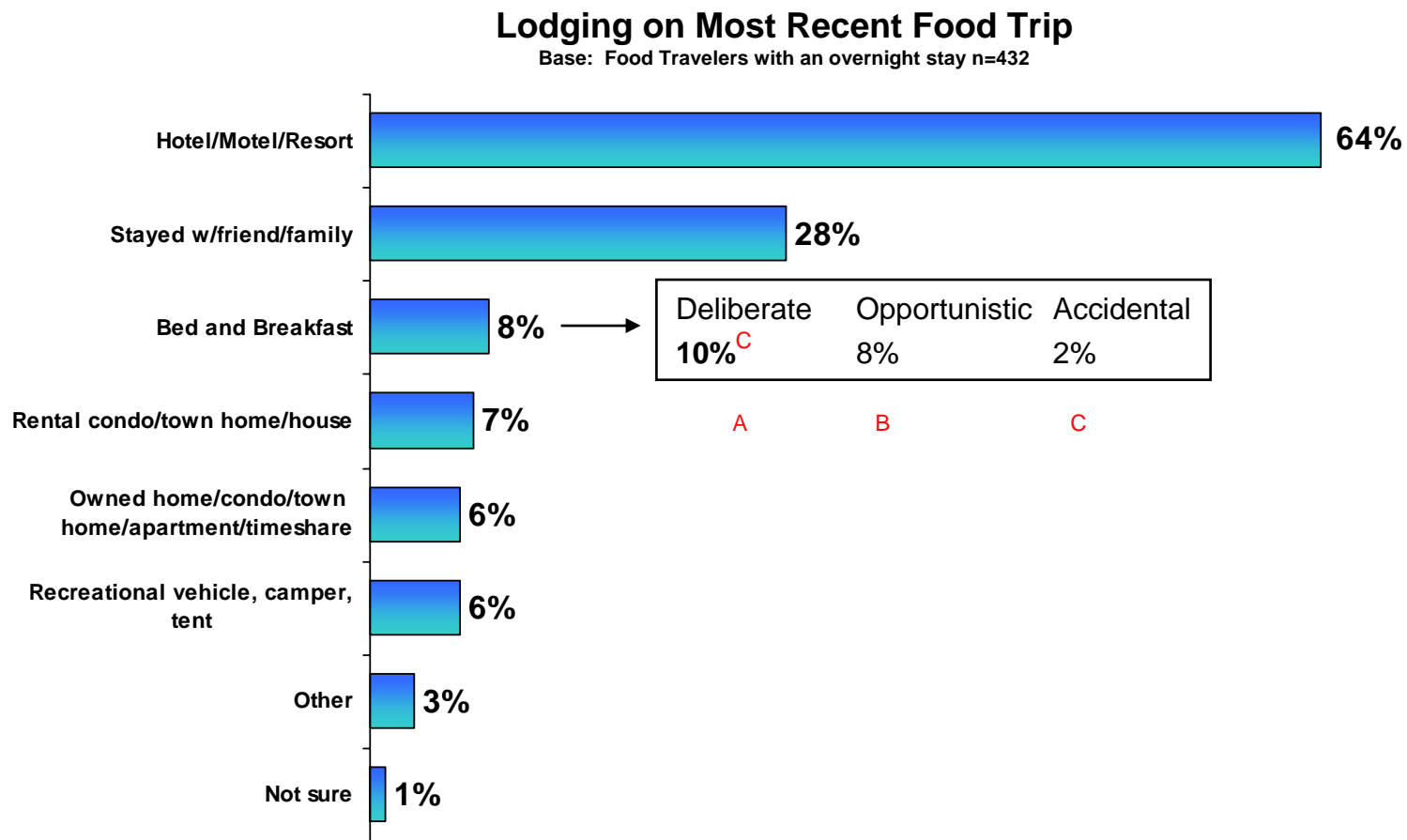
- About three-fourths of Food Travelers participated in food-related activities on trips that were three days or longer with three or more overnights. This is consistent regardless of intent to participate in food travel (i.e. Deliberate, Opportunistic or Accidental).

	Delib A	Opp B	Acc C
Sample Size	(211)	(179)	(61)
Just a day trip; no overnights	8%	9%	12%
1 to 2 days with at least 1 overnight	20%	15%	15%
3 to 4 days with 2 to 3 overnights	29%	28%	30%
5 to 6 days with 4 to 5 overnights	15%	22%	18%
7 days or longer; 6 or more overnights	28%	25%	24%



Lodging on Most Recent Food Trip

- About two-thirds of travelers who took a recent trip where they participated in food-related activities (and stayed at least one overnight) stayed in a hotel, motel or resort, while another quarter (28%) stayed with friends or family. Findings are consistent across groups, except that Deliberate Food Travelers were more likely to have stayed in a bed and breakfast while on their trips.



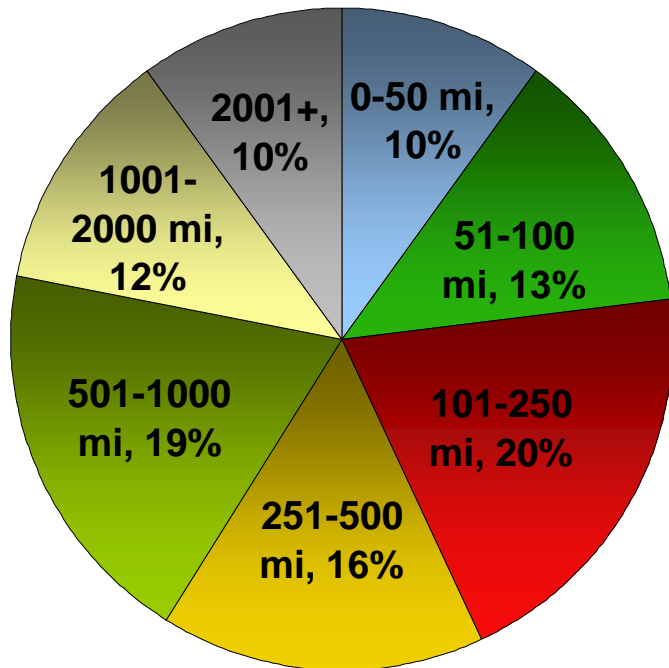
Distance Traveled and Transportation Used on Most Recent Food Trip



- Over three-fourths of Food Travelers (78%) went more than 100 miles from home on their most recent food trip. The majority (58%) cite autos as their primary mode of transportation, while just under one-third (30%) traveled by plane.

Miles Traveled One-Way from Home to Destination

Base: Food Travelers n=451



Transportation Used to Get to Destination Where Engaged in Food-Related Activities:

Base: Food Travelers n=451

	Used	Primary Mode
Automobile	73%	58%
Airline	31%	30%
Train	9%	1%
Bus	9%	2%
Ship	6%	2%
RV/Camper	6%	3%
Other	6%	4%

Q15. How far did you travel from your home one-way to get to this destination? If you're not sure about the exact mileage, please make your best estimate.

Q16. Which of the following modes of transportation did you use during this trip to get to the destination where you engaged in culinary activities? And of those what was the primary mode of transportation (i.e. mode of transportation used to cover the most miles)?

Expenditures on Most Recent Food Trip



- On average, Food Travelers spend over one-third (36%) of their personal travel budget on food-related activities. Deliberate and Opportunistic Food Travelers are spending a significantly higher dollar amount on food-related activities than Accidental Food Travelers.

<i>Base: Food Travelers n=451</i>	Amount personally spent <u>in total</u> on trip	Amount personally spent on <u>food-related activities</u>	Amount spent on <u>food-related activities</u> by all members of <u>travel party</u>
\$0	1%	2%	4%
\$1-\$99	6%	23%	13%
\$100-\$249	12%	34%	25%
\$250-\$499	15%	20%	18%
\$500-\$749	19%	8%	13%
\$750-\$999	6%	2%	4%
\$1000+	37%	11%	22%
Refused/no answer	3%	0%	0%
Mean	\$1194	\$425	\$694
Mean Expenditures:			
A Deliberate	\$1271	\$427 ^C	\$847 ^C
B Opportunistic	\$1180	\$593 ^C	\$648
C Accidental	\$1058	\$212	\$437

- Q17. About how much would you say you, personally, spent in total on this trip (including transportation, lodging, entertainment, food & dining expenses, etc.)? Please include spending on items that you paid for even if they were for other people.
- Q18. And about how much would you say you, personally, spent on culinary activities on this trip? Please include spending on culinary activities that you paid for even if they were for other people.
- 18a. And about how much would you say was spent on culinary activities on this trip by all members of your travel party including those from your household and friends/family who accompanied you on the trip?

Activities on Most Recent Food Trip



- Trip activities are fairly similar among the food traveler segments, with shopping, touring/sightseeing, entertainment, beach and waterfront visits and historic site visits among the most popular.
- Serious Food Travelers (Deliberates & Opportunistics) are more likely than the Accidental Food Travelers to visit parks, camp, hike/bike or take a group tour; however, these activities are mentioned by less than 1 in 4 Deliberate and Opportunistic Food Travelers.

General Activities	Food Travelers	Delb	Opp	Acc		Food Travelers	Delb	Opp	Acc
Base Food Travelers:	(451)	(211)	(179)	(61)	Base Food Travelers:	(451)	(211)	(179)	(61)
		A	B	C			A	B	C
Shopping	57%	55%	58%	61%	Gambling	14%	13%	18%	10%
Touring/Sightseeing	49%	50%	49%	47%	Hiking, Biking, etc.	12%	13%	16% ^C	6%
Entertainment	37%	37%	40%	35%	Looking at Real Estate	12%	15%	8%	12%
Visiting Beaches/Waterfronts	32%	32%	37%	27%	Spa Services	10%	10%	8%	11%
Visiting Historic Sites	31%	31%	34%	28%	Group Tour	10%	11% ^C	11% ^C	4%
Night Life	29%	31%	29%	26%	Boating/Sailing	9%	10%	9%	6%
Visiting Museums, Art Exhibits, etc.	26%	22%	29%	28%	Camping	8%	12% ^B	5%	5%
Attending a Social or Family Event	22%	23%	17%	24%	Watching Sports Events	8%	9%	6%	9%
Nature Activities	20%	21%	22%	17%	Taking Seminars or Courses	7%	7%	7%	8%
Visiting National Parks	20%	23% ^C	21%	11%	Hunting, Fishing, etc.	7%	5%	9%	6%
Visiting Zoos, Aquariums or Science Museums	19%	18%	19%	21%	Attending Shows: Boat, Car, Home etc.	6%	7%	7%	3%
Visiting State Parks	17%	19%	19%	12%	Playing Golf	6%	6%	7%	4%
Visiting Theme or Amusement Parks	16%	18%	13%	17%	Other Adventure Sports	5%	4%	4%	9%
Attending Concerts, Play, Dance, etc.	16%	16%	17%	14%	Snow Skiing, Snow Boarding	3%	6%	0%	0%

Q19. Thinking of your most recent trip in which you participated in culinary activities (cooking classes, dining out for a unique and memorable experience, farmers markets, gourmet food shopping, food festivals, etc.), which of the following activities did you participate in on that specific trip? Please select all that apply.

Activities on Most Recent Food Trip

- While it's not surprising that going to a restaurant "just to eat" is the most common food-related activity, others that score consistently high across groups include going to local restaurants for a unique and memorable experience and experiencing local or regional cuisine. Deliberate Food Travelers are more likely than others to participate in a variety of other food-related activities.

Food/Wine-Related Activities	Food Travelers	Deliberate	Opportunistic	Accidental
Base: Food Travelers	(451)	(211)	(179)	(61)
		A	B	C
Going to a restaurant "just to eat"	71%	71%	73%	69%
Going to local restaurants (not fine dining) for a unique and memorable experience	63%	62%	69%	59%
Experiencing local or regional cuisine	50%	50%	54%	48%
Going to fine dining restaurants for a unique and memorable experience	48%	51%	47%	42%
Visiting farmers markets	29%	29%	32%	25%
Sampling traditional artisan products (e.g. cheeses)	20%	27% C	18% C	8%
Attending a culinary festival (i.e. chili, cheese, chocolate, etc.)	16%	24% BC	10%	9%
Touring wineries/Tasting locally made wines	16%	21% C	15%	6%
Touring local breweries/Tasting locally brewed beers	14%	20% BC	12%	7%
Driving a wine trail	9%	13% C	7%	3%
Attending a wine festival	7%	11% C	5%	3%
Touring local farms (e.g. dairy, grain)	7%	9%	8%	3%
Taking cooking classes	7%	9%	5%	4%

Activities on Most Recent Food Trip

- While going to a restaurant “just to eat” and going to local restaurants are generally secondary activities of food-related travel, other culinary activities are pretty evenly split among being key drivers and secondary drivers for travel.

Food/Wine-Related Activities	Food Travelers	Key Activity	Secondary Activity
<i>Base: Food Travelers</i>	(451)		
Going to a restaurant "just to eat"	71%	22%	49%
Going to local restaurants (not fine dining) for a unique and memorable experience	63%	25%	38%
Experiencing local or regional cuisine	50%	21%	29%
Going to fine dining restaurants for a unique and memorable experience	48%	22%	26%
Visiting farmers markets	29%	12%	17%
Sampling traditional artisan products (e.g. cheeses)	20%	7%	13%
Attending a culinary festival (i.e. chili, cheese, chocolate, etc.)	16%	10%	7%
Touring wineries/Tasting locally made wines	16%	10%	6%
Touring local breweries/Tasting locally brewed beers	14%	5%	9%
Driving a wine trail	9%	5%	4%
Attending a wine festival	7%	5%	2%
Touring local farms (e.g. dairy, grain)	7%	4%	3%
Taking cooking classes	7%	2%	4%

Q20. For each of the following activities that you indicated you participated in on a recent trip, please indicate if that activity is something you did as a key activity on that trip (that is, a main reason you were on that trip), or a secondary activity (something that you did on that trip, but not a main reason for your trip). If you have done these activities on multiple trips within the past three years, please think about the most recent trip.



Wine Travel

Engage in wine-related activities i.e. participating in winery tours, driving a wine trail, tasting locally made wines, or attending wine festivals, etc.

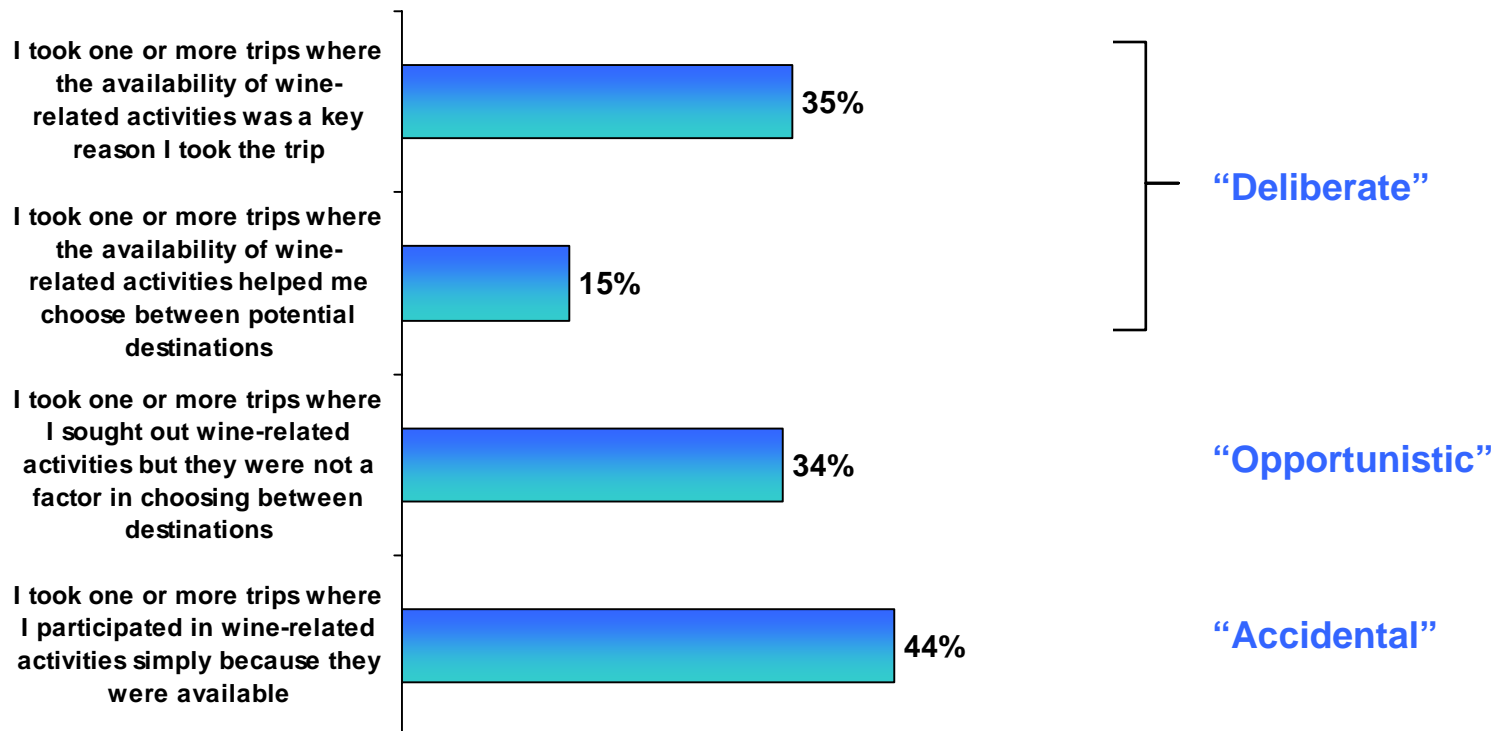
Interest and Participation in Wine Travel



- As stated earlier, just under ten percent of the total population of leisure travelers (9.4%) have participated in wine-related activities while on a trip in the past three years.
- When thinking about all of their wine-related travel in the past three years, Wine Travelers were asked to indicate which statement(s) described their travel decision making.
 - Approximately thirty-five percent report their wine-related activities were a key reason for at least one trip, and fifteen percent report their availability helped them choose between destinations.

Wine Traveler Interest by Segment among the Wine Travel Population

Base: Wine Travelers n=406, segments not mutually exclusive on this chart

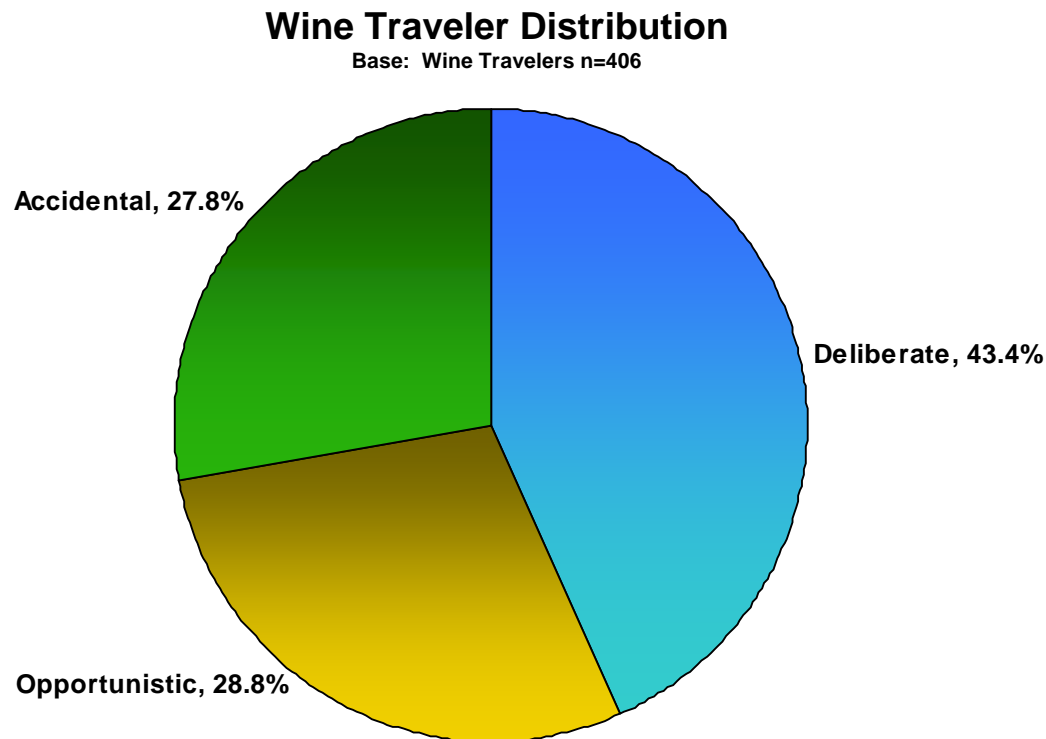


Q5. Thinking of any trips you have taken within the United States over the past three years, please indicate which of the following activities you participated in while on any of those trips.

Q21. Thinking about all the trips you have taken within the United States over the past three (3) years in which you participated in wine-related activities (participating in winery tours, driving a wine trail, tasting locally made wines, or attending wine festivals), which of the following applies to you? **Multiple responses accepted – Deliberate, Opportunistic & Accidental groups are not mutually exclusive on this chart.**

Influence of Wine Travel on Trips Taken

- When respondents were classified into a single group based on their highest level of interest in wine tourism, slightly under half (43%) of those who have participated in wine-related activities while on a past trip did so deliberately, meaning it was a factor in choosing between destinations (4.7% of the total leisure traveler population).



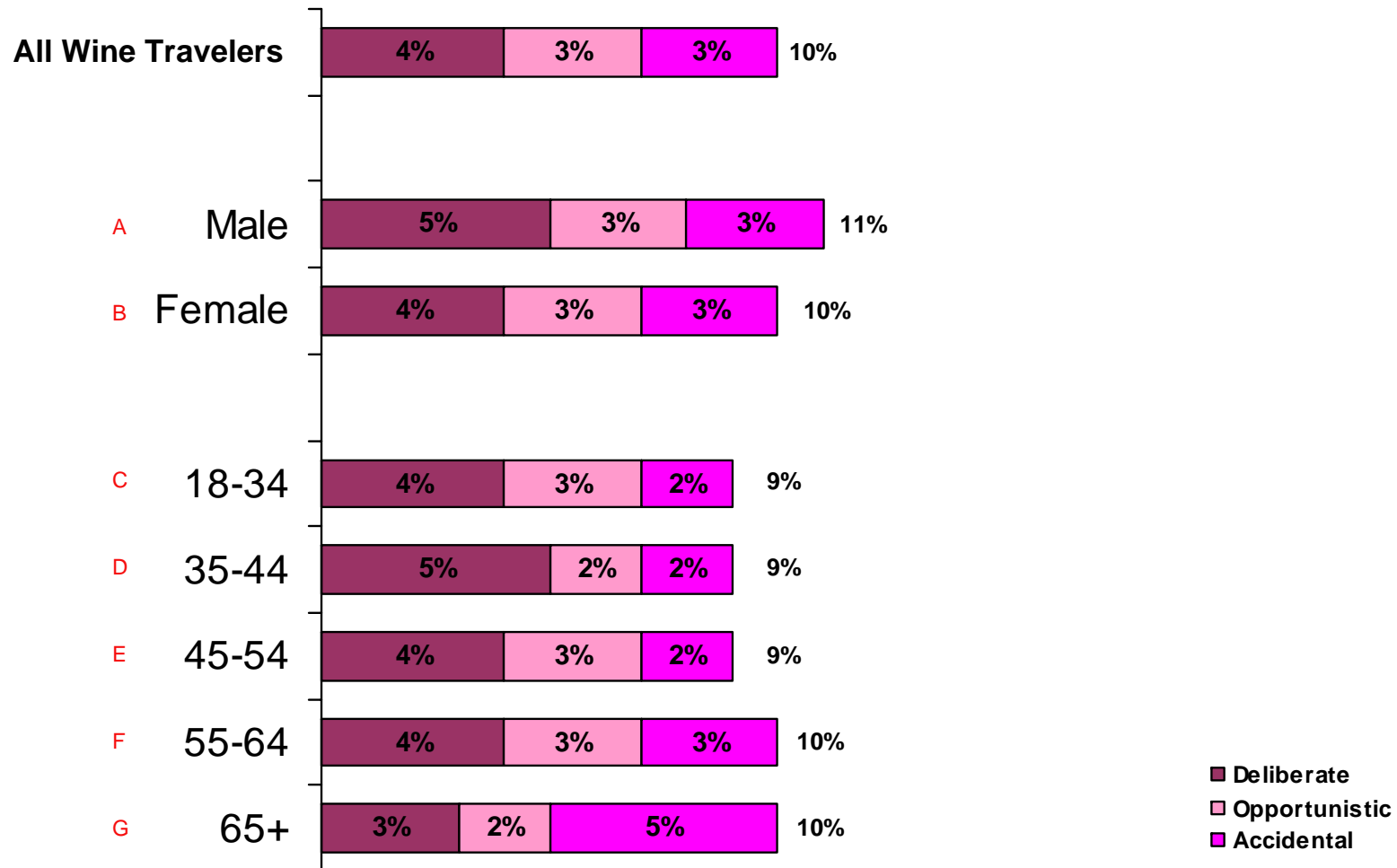
Q21. Thinking about all the trips you have taken within the United States over the past three (3) years in which you participated in wine-related activities (participating in winery tours, driving a wine trail, tasting locally made wines, or attending wine festivals), which of the following applies to you? **Mutually exclusive groups, with classification based on respondent's highest level of interest in wine-related tourism.** 71

Incidence of Wine Travel by Group

- Wine Traveler incidence is relatively consistent across age and gender groups.

Wine Travel Incidence among the Leisure Travel Population

Base: Leisure Travelers n=2364

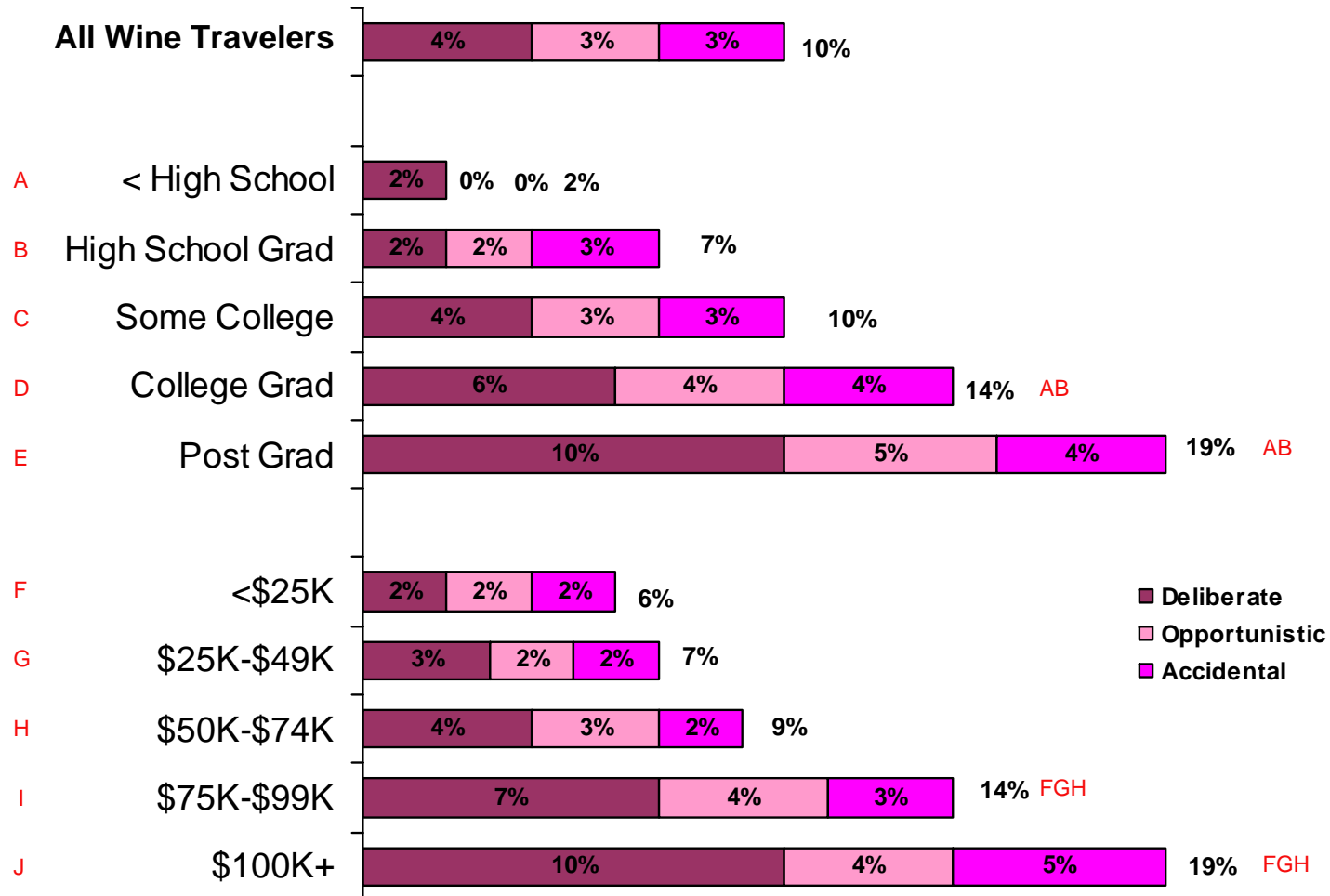


Incidence of Wine Travel by Group

- Wine Traveler incidence is highly correlated with education and income.

Wine Travel Incidence among the Leisure Travel Population

Base: Leisure Travelers n=2364

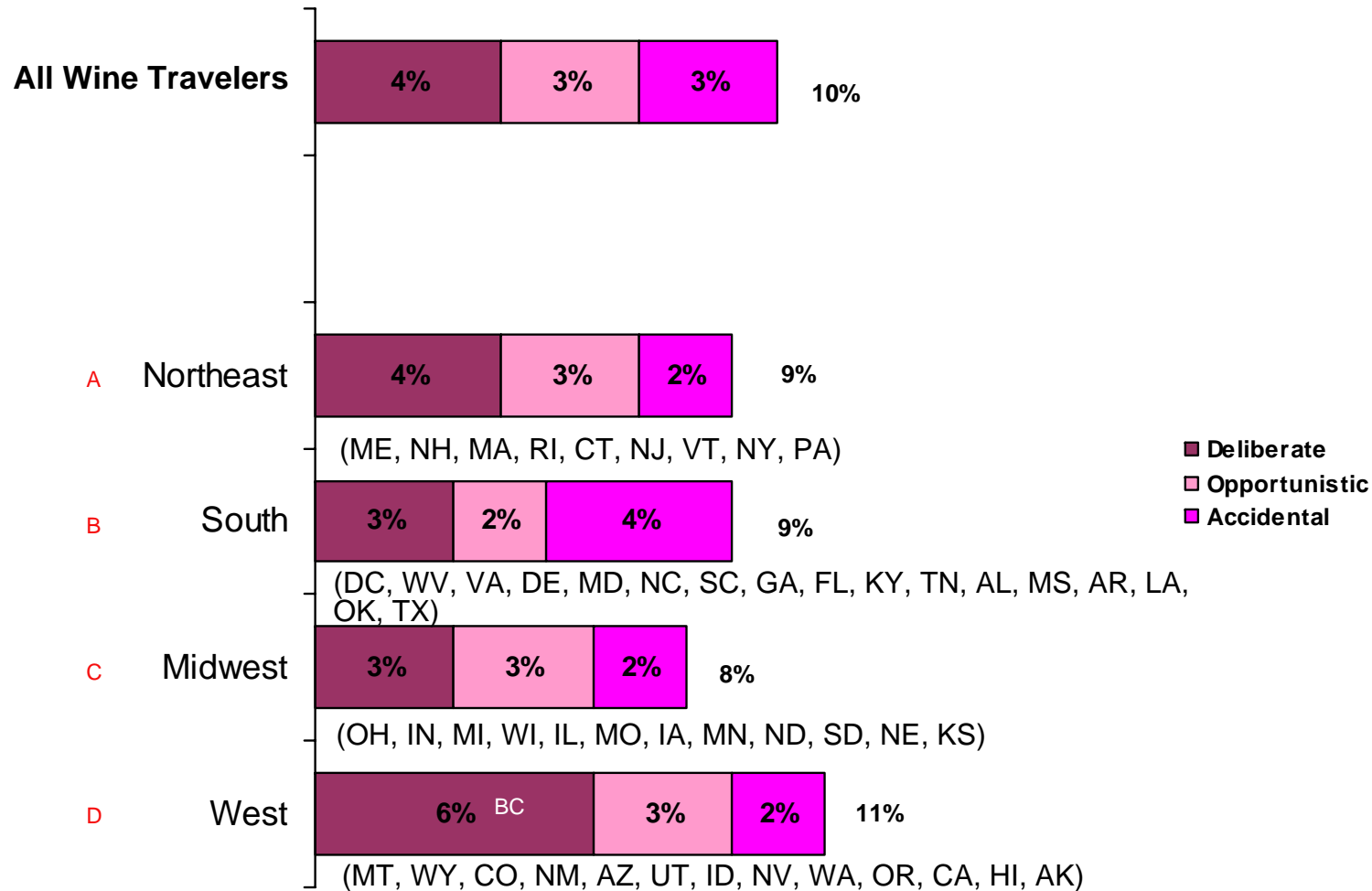


Incidence of Wine Travel by Group

- While Wine Traveler incidence is fairly similar across regions, it is higher among leisure travelers who live in the West.

Wine Travel Incidence among the Leisure Travel Population

Base: Leisure Travelers n=2364



Past Wine Travel Trip Locations

- California dominates as a destination for winery travel, with New York following. Two-in-five of these Wine Travelers state their most recent trip was to a repeat destination.

Location of Last Wine-Related Trip

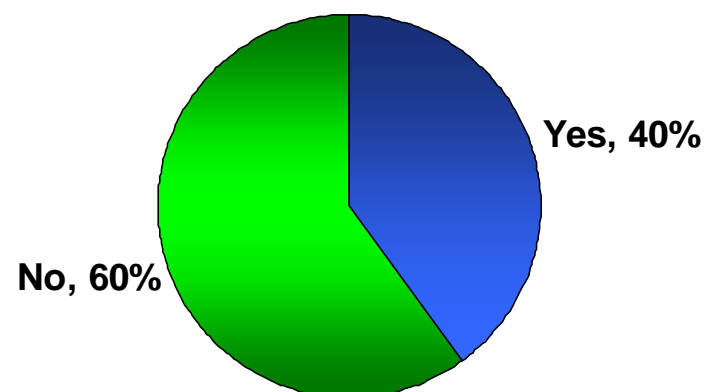
Base: Wine Travelers n=406

California	31%	Hawaii	1%
New York	10%	Maryland	1%
Missouri	5%	Minnesota	1%
North Carolina	5%	Colorado	1%
Oregon	5%	Arkansas	1%
Pennsylvania	5%	Indiana	1%
Washington	4%	Alaska	1%
Virginia	4%	Connecticut	1%
Texas	4%	Arizona	1%
Florida	2%	Wisconsin	1%
Michigan	2%	New Mexico	1%
Ohio	2%	Nevada	1%
New Jersey	1%	Kentucky	1%
Illinois	1%	Louisiana	1%
Tennessee	1%	South Carolina	1%

Not applicable; Region only mentions 2%; All other states received less than a 1% mention for each

Previously Participated in Wine-Related Activities in Location

Base: Wine Travelers n=406

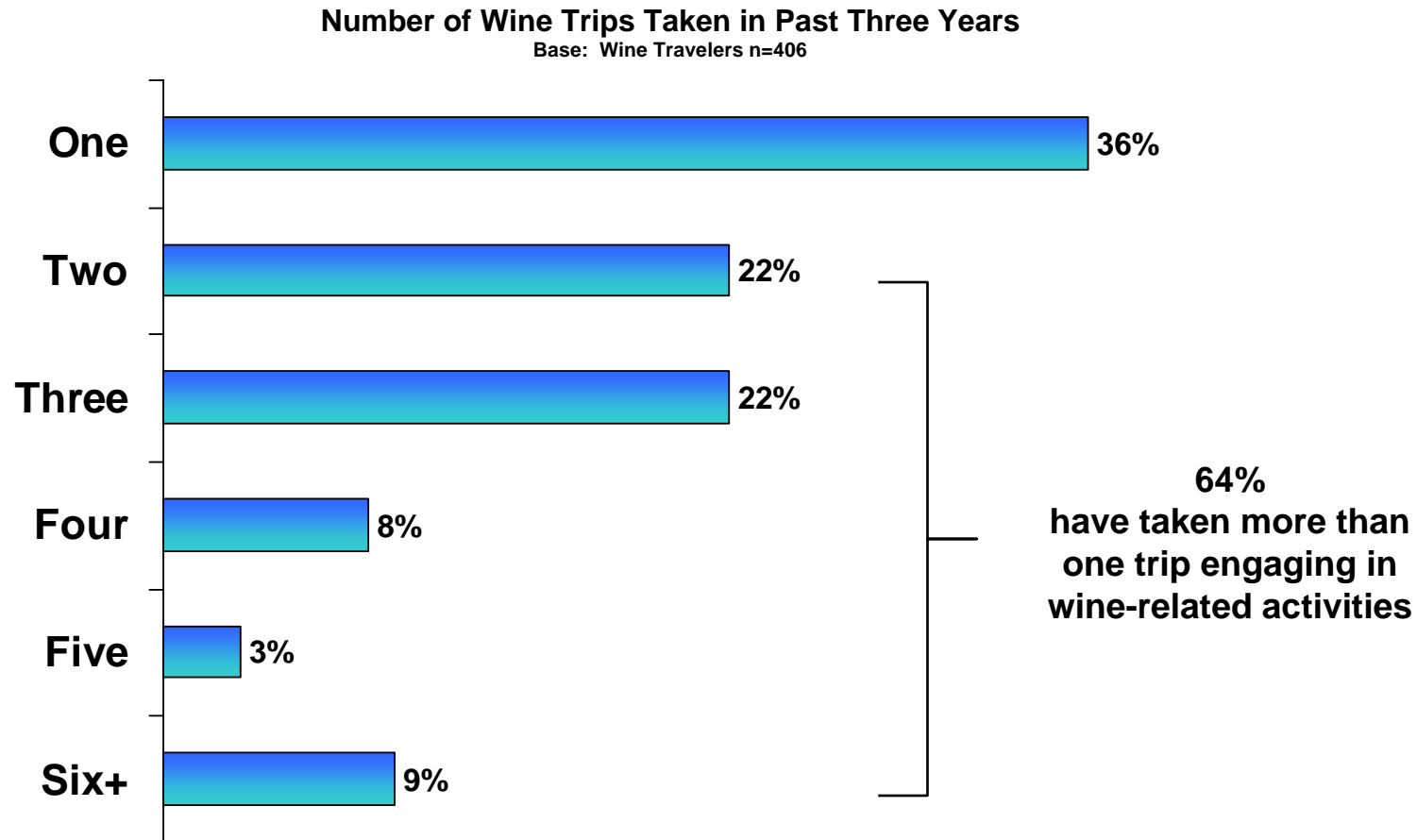


Q22. What was the location of the most recent trip you took in which you participated in wine-related activities (participating in winery tours, driving a wine trail, tasting locally made wines, or attending wine festivals)?

Q23. Prior to your trip, had you participated in wine-related activities in this region previously?

Number of Wine Trips Taken in Past Three Years

- Two-thirds (64%) of Wine Travelers have taken more than one trip during the past three years in which they engaged in wine-related activities.

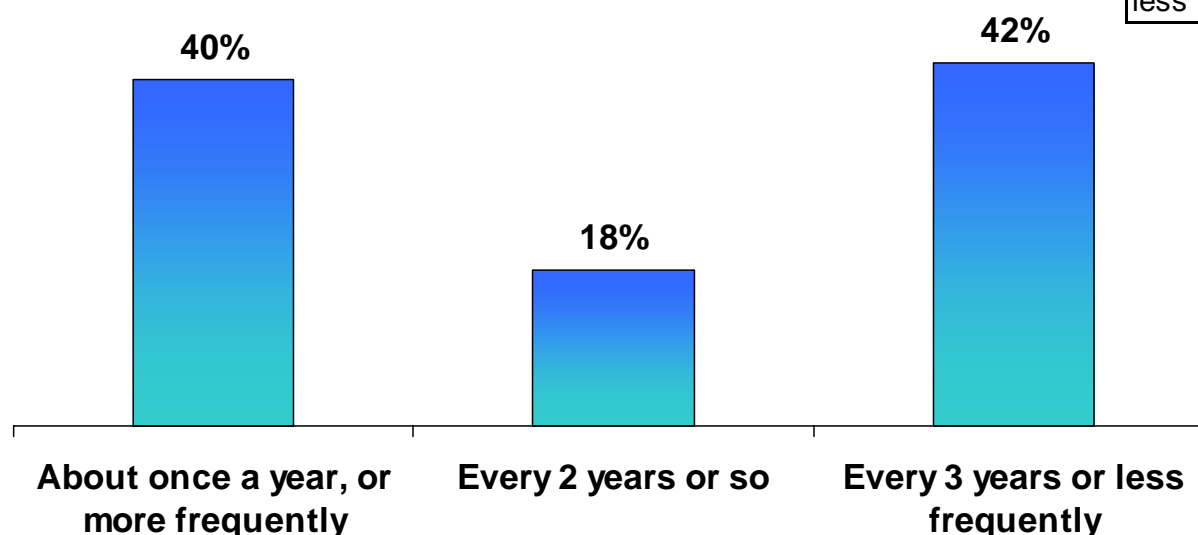


Frequency of Trips Where Wine-Related Activities Are Key Drivers

- Two-in-five Wine Travelers (40%) take one or more trips per year where wine-related activities are the key drivers. Deliberate Wine Travelers are much more likely (61%) than others to be taking these trips once or more per year.

Frequency of Taking Trips Where Wine-Related Activities Are Key Drivers

Base: Wine Travelers n=406



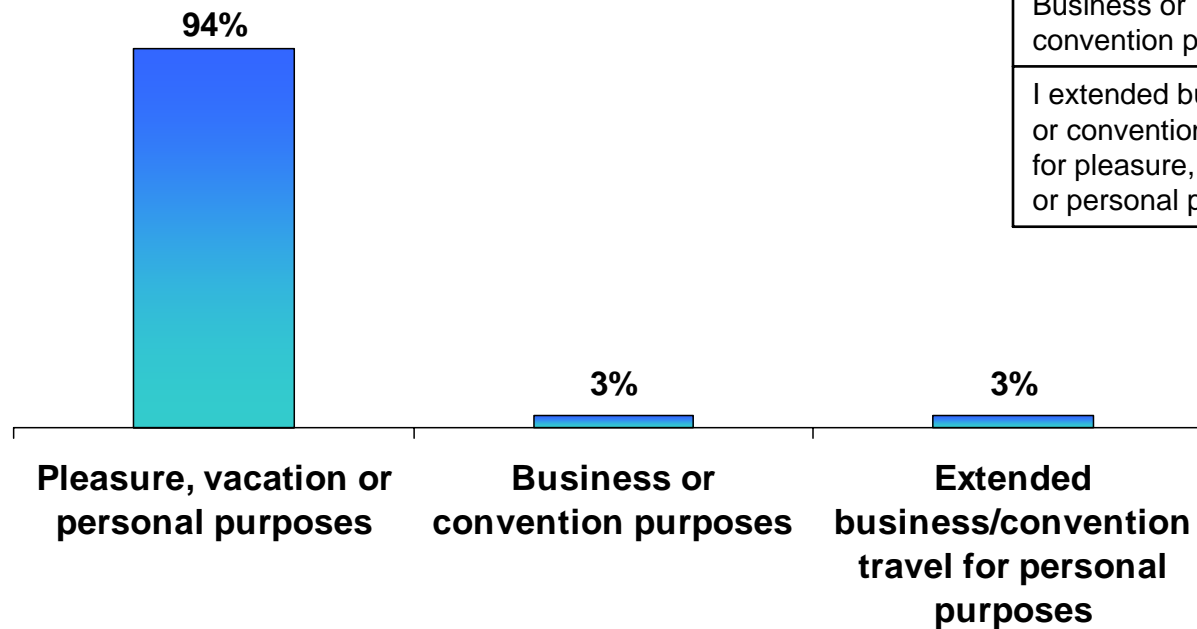
	Delib	Opp	Acc
	A	B	C
Unweighted	(219)	(129)	(58)
Once a year +	61%	30%	17%
Every 2 years or so	21% ^{BC}	20% ^C	12%
Every 3 years or less	19%	49% ^A	72% ^{AB}

Nature of Most Recent Wine Trip

- The overwhelming majority of Wine Travelers (94%) took their most recent food trip for pleasure, vacation or personal purposes.
 - More Opportunistic Wine Travelers participated in wine-related activities on a business trip compared to Accidental Wine Tourists who indicate such a trip does not partner well with business or convention travel.

Nature of Most Recent Wine Trip

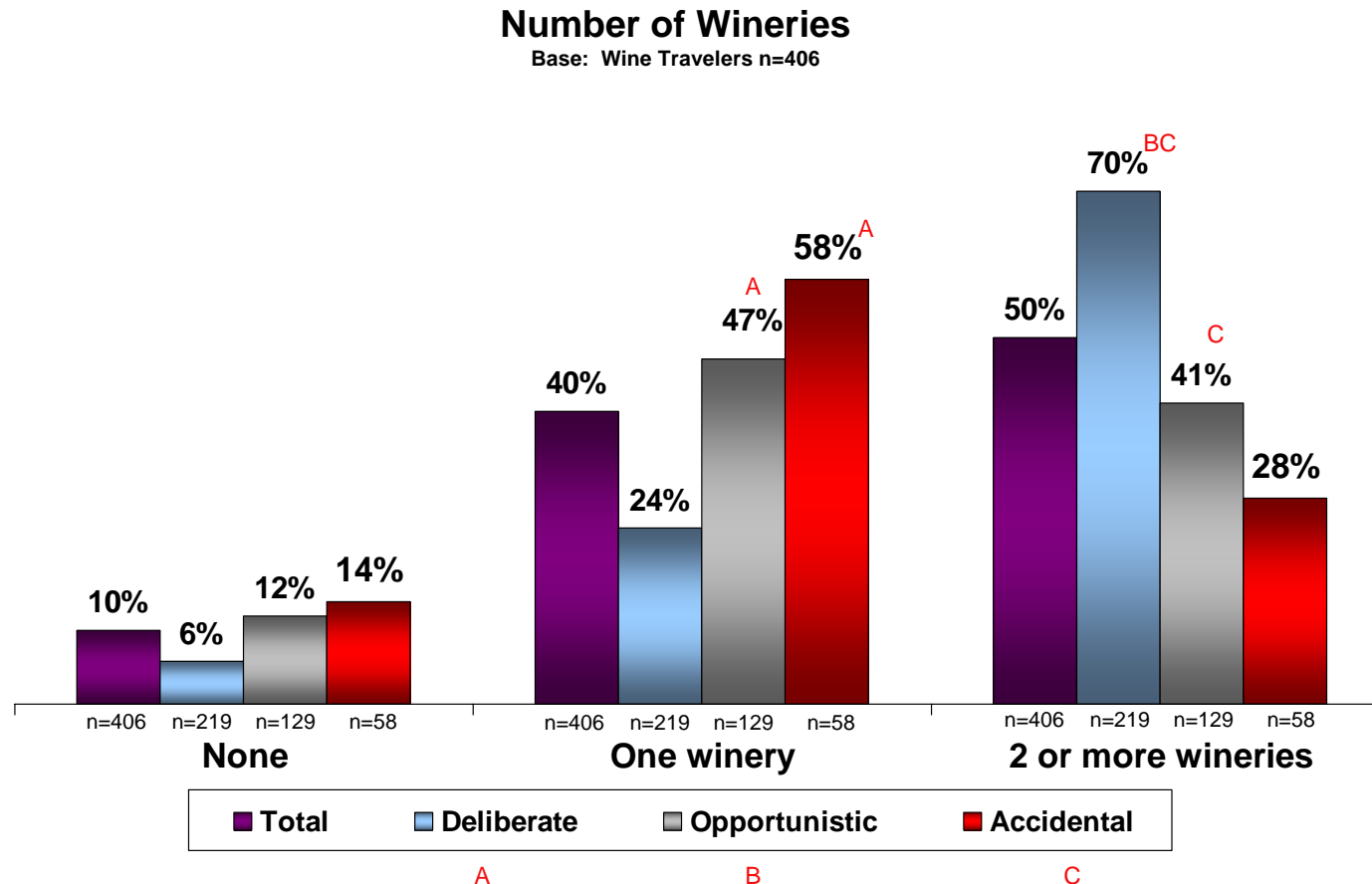
Base: Wine Travelers n=406



	Delib	Opp	Acc
	A	B	C
Unweighted n size	(219)	(129)	(58)
Pleasure, vacation or personal purposes	93%	88%	100% ^{AB}
Business or convention purposes	1%	9% ^A	0%
I extended business or convention travel for pleasure, vacation or personal purposes	6%	3%	0%

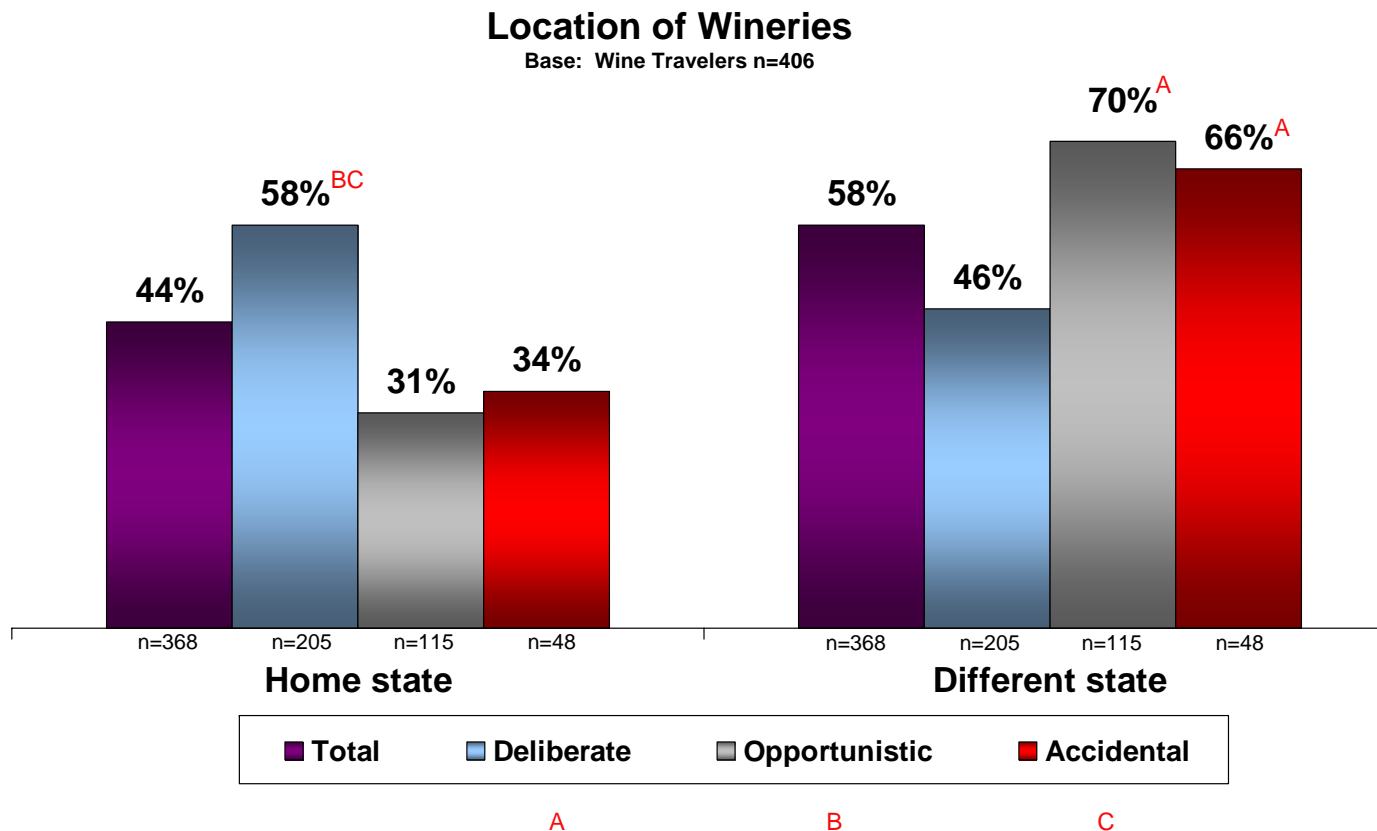
Number of Wineries Visited on Most Recent Wine Trip

- Overall, 51% visited more than one winery on their most recent trip in which they engaged in wine-related activities. Seventy percent of Deliberate Wine Travelers visited multiple wineries, while a plurality of Opportunistic Wine Travelers (47%) and a majority of Accidental Wine Travelers (58%) visited only one winery.



Location of Wineries on Most Recent Wine Trip

- Overall, Wine Travelers visit wineries in both their home states and in different states. Deliberate Wine Travelers are more likely to have visited wineries in their home state (58%), while Opportunistic and Accidental Wine Travelers are more likely to have visited wineries in a different state (70% and 66%, respectively).





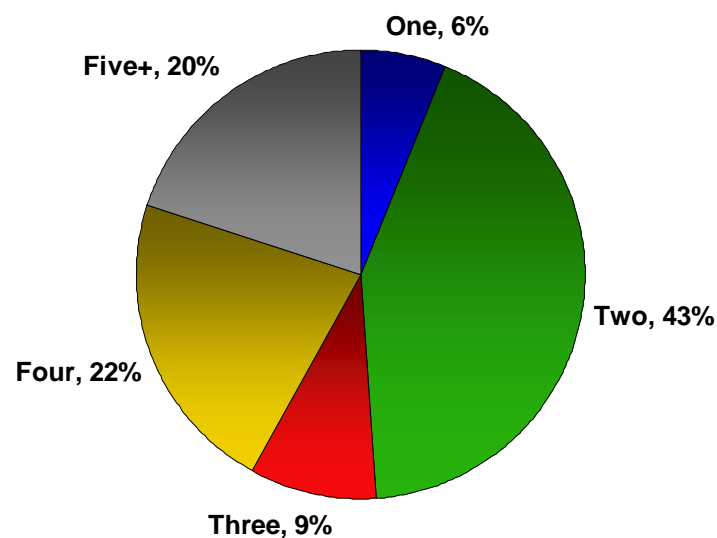
Travel Industry Association

Travel Party on Most Recent Wine Trip

- Ninety-five percent of Wine Travelers took their most recent trip with others – 43% in a party of two. Two-thirds took their trip with their spouse or significant other, and one-fourth did so with friends.
 - Deliberate and Opportunistic Wine Travelers were more likely than Accidental Wine Travelers to travel with friends.

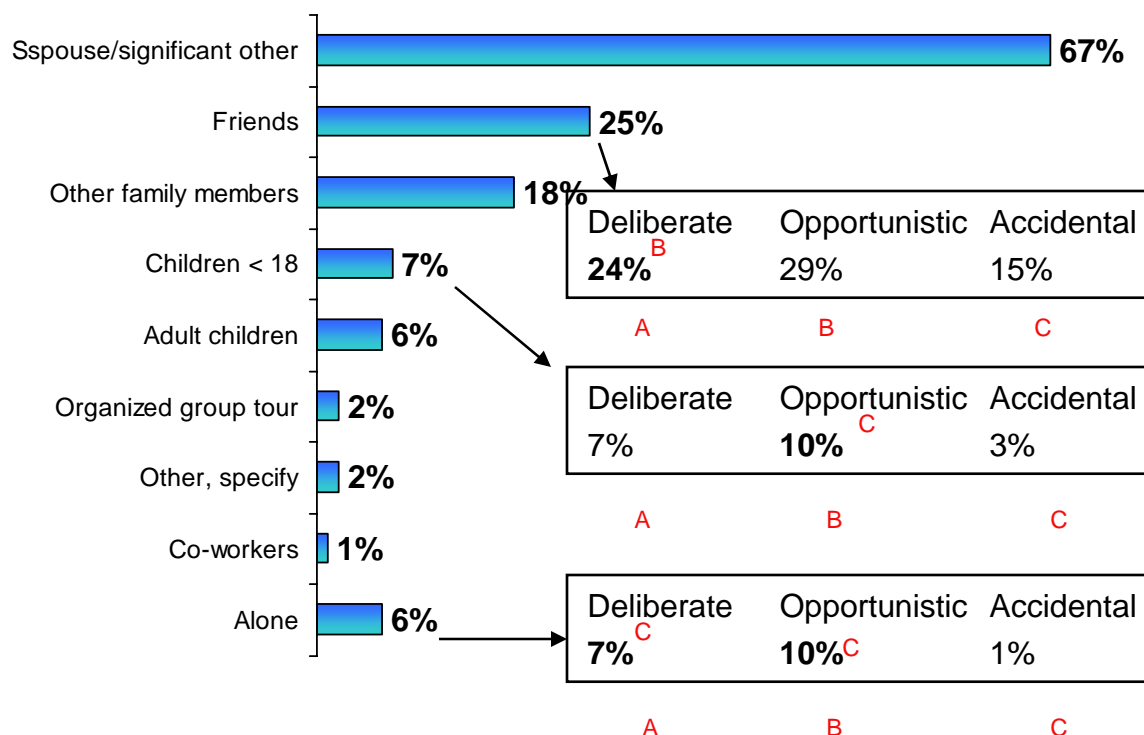
Travel Party Size

Base: Wine Travelers n=406



Travel Party Composition

Base: Wine Travelers n=406



Q29b. And, including yourself, how many people were in your travel party on this trip? Please include people from your household and friends/family who accompanied you but not those whom you met as part of a tour group.

Q29. And, with whom did you travel on this trip? Please select all that apply.

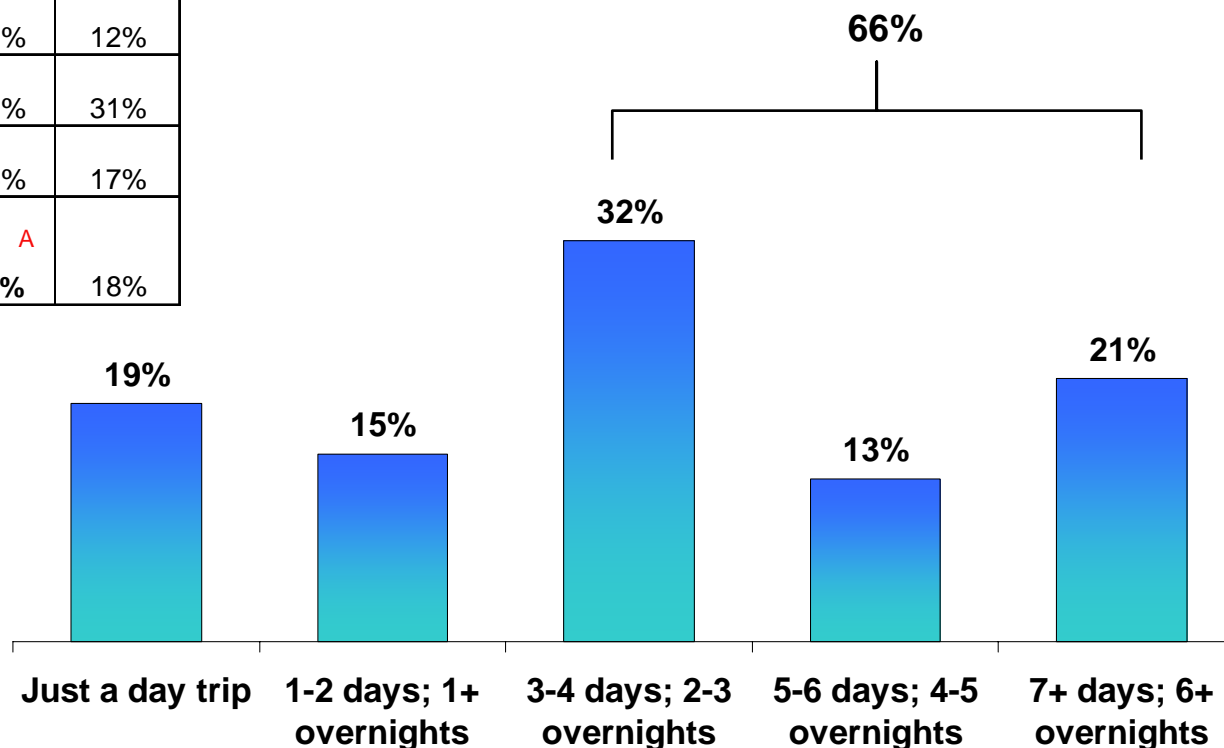
Length of Most Recent Wine Trip

- Two-thirds of Wine Travelers (66%) participated in wine-related activities on trips that were three days or longer, while one-in-five (19%) said their most recent trip was just a day trip.
 - The significantly higher percentage of Deliberate Day-Trippers may be explained by their increased likelihood to visit wineries in their home state. Similarly, the longer length of stay by Opportunistic Wine Travelers may be explained by their significantly higher likelihood to visit wineries outside their home state.

	Delib	Opp	Acc
	^A	^B	^C
Unweighted n size	(219)	(129)	(58)
Just a day trip; no overnights	^B 24%	9%	^B 23%
1 to 2 days with at least 1 overnight	18%	12%	12%
3 to 4 days with 2 to 3 overnights	31%	32%	31%
5 to 6 days with 4 to 5 overnights	10%	15%	17%
7 days or longer with 6 or more overnights	18%	^A 31%	18%

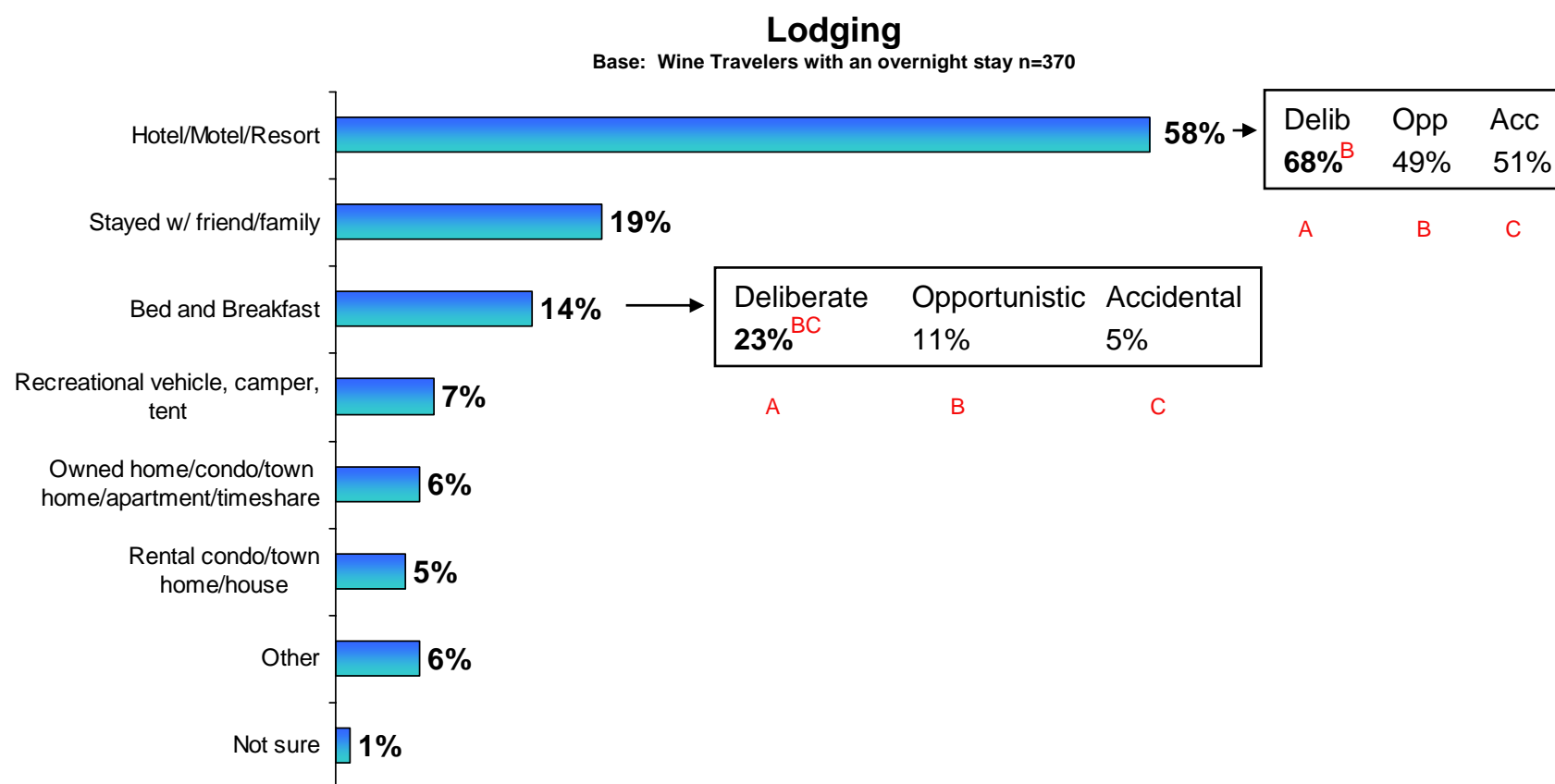
Length of Most Recent Wine Trip

Base: Wine Travelers n=406



Lodging on Most Recent Wine Trip

- The majority of respondents who took a recent trip where they participated in wine-related activities (and stayed at least one overnight) stayed in a hotel, motel or resort. Findings are fairly consistent across groups, except that Deliberate Wine Travelers were more likely to have stayed in a hotel/motel/resort or a bed and breakfast while on their trips.



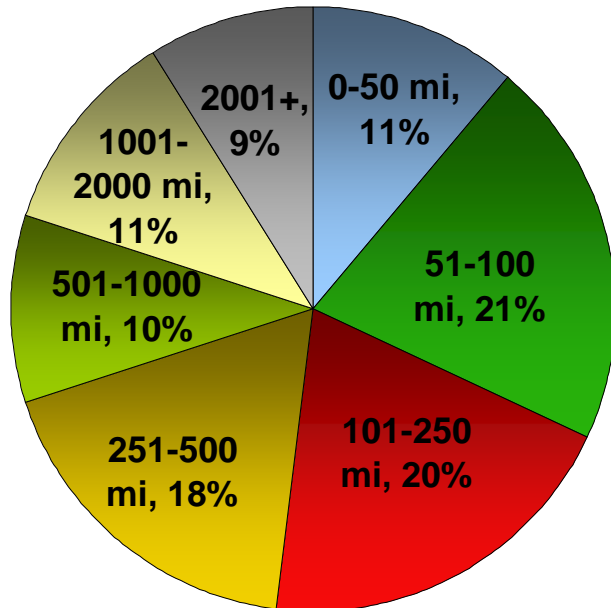
Distance Traveled and Transportation Used on Most Recent Wine Trip



- Two-thirds of Wine Travelers (69%) went more than 100 miles from home on their most recent wine trip. The majority traveled primarily by car (64%), although one-fifth (21%) traveled by plane.

Miles Travel One-Way from Home to Destination

Base: Wine Travelers n=406



Transportation Used to Get to Destination Where Engaged in Wine-Related Activities

Base: Wine Travelers n=406

	Used	Primary Mode
Automobile	71%	64%
Airline	23%	21%
Bus	7%	3%
RV/Camper	4%	5%
Train	4%	0%
Ship	2%	2%
Other	3%	4%

Q32. How far did you travel from your home one-way to get to this destination? If you're not sure about the exact mileage, please make your best estimate.

Q33. Which of the following modes of transportation did you use during this trip to get to the destination where you engaged in wine-related activities? And of those what was the primary mode of transportation (i.e. mode of transportation used to cover the most miles)?

Expenditures on Most Recent Wine Trip



- Average personal spending on wine-related activities (\$219) is about one-fourth of total personal spending (\$973). Deliberate and Opportunistic Wine Travelers are spending a significantly higher dollar amount on wine-related activities than Accidental Wine Travelers.

<i>Base: Wine Travelers n=188</i>	Amount personally spent in <u>total</u> on trip	Amount personally spent on <u>purchases relating to wine</u>	Amount spent on <u>purchases relating to wine</u> by all members of <u>travel party</u>
\$0	0%	6%	7%
\$1-\$99	9%	41%	25%
\$100-\$249	15%	34%	32%
\$250-\$499	23%	11%	17%
\$500-\$749	14%	3%	9%
\$750-\$999	4%	1%	2%
\$1000+	31%	4%	9%
Refused/No Answer	4%	0%	0%
Means	\$973	\$219	\$410
Mean Expenditures:			
A Deliberate	\$950	\$339	\$616
B Opportunistic	\$1090	\$177	\$259
C Accidental	\$885	\$79	\$247

- Q34. About how much would you say you, personally, spent in total on this trip (including transportation, lodging, entertainment, food & dining expenses, wine, souvenirs, entrance fees, wine at dinners out etc.)? Please include spending on items that you paid for even if they were for other people.
- Q35. And about how much would you say you, personally, spent in total on purchases relating to wine on this trip? Please include wine bottles you purchased, money spent on wine tours, and money spent on wine at dinners out, etc. Please also include spending on purchases relating to wine that you paid for even if they were for other people.
- Q35a. And about how much would you say was spent on purchases relating to wine on this trip by all members of your travel party including those from your household and friends/family who accompanied you on the trip?

Activities on Most Recent Wine Trip

- Trip activities are similar among Wine Traveler groups, with shopping, touring/sightseeing, visiting historic sites, entertainment, and beach and waterfront visits among the most popular.

General Activities	Wine Travelers	Delb	Opp	Acc		Wine Travelers	Delb	Opp	Acc
Base: Wine Travelers	(406)	(219)	(129)	(58)	Base: Wine Travelers	(406)	(219)	(129)	(58)
		A	B	C			A	B	C
Shopping	47%	43%	54%	44%	Gambling	10%	9%	8%	12%
Touring/Sightseeing	46%	46%	47%	45%	Attending Concerts, Play, Dance, etc.	8%	10%	6%	7%
Visiting Historic Sites	28%	24%	34%	30%	Visiting Theme or Amusement Parks	7%	3%	^A 10%	10%
Entertainment	24%	18%	19%	^{AB} 39%	Spa Services	7%	^C 8%	^C 9%	2%
Visiting Beaches/Waterfronts	21%	20%	25%	17%	Looking at Real Estate	6%	5%	5%	10%
Night Life	18%	16%	18%	20%	Camping	6%	6%	5%	4%
Visiting State Parks	16%	16%	16%	17%	Playing Golf	5%	7%	7%	2%
Visiting National Parks	16%	15%	18%	15%	Boating/Sailing	4%	4%	5%	4%
Visiting Museums, Art Exhibits, etc.	15%	13%	19%	16%	Watching Sports Events	4%	4%	4%	5%
Nature Activities	14%	15%	14%	13%	Taking Seminars or Courses	4%	3%	2%	5%
Group Tour	13%	13%	10%	15%	Hunting, Fishing, etc.	3%	3%	7%	0%
Attending a Social or Family Event (e.g. wedding, funeral, graduation)	11%	7% ^C	14% ^C	13%	Attending Shows: Boat, Car, Home, etc.	3%	2%	2%	5%
Hiking, Biking, etc	10%	^C 13%	^C 15%	1%	Other Adventure Sports	3%	2%	5%	2%
Visiting Zoos, Aquariums/Science Museums	10%	8%	^A 16%	7%	Snow Skiing, Snow Boarding	1%	2%	1%	1%

Q36. Thinking of your most recent trip in which you participated in wine-related activities, which of the following activities did you participate in on that specific trip? Please select all that apply.

Activities on Most Recent Wine Trip

- While two-thirds of Wine Travelers (65%) toured wineries or tasted local wines, one-quarter (24%) report they drove a wine trail, and just over one-in-ten (12%) attended a wine festival. Wine trails and festivals are particularly prevalent among Deliberate Wine Travelers.

Food/Wine-Related Activities	Wine Travelers	Delb	Oppr	Accd
<i>Base: Wine Travelers</i>	(406)	(219)	(129)	(58)
		A	B	C
Touring wineries/Tasting locally made wines	65%	72%	62%	59%
Going to a restaurant "just to eat"	56%	51%	63% ^A	56%
Going to local restaurants (not fine dining) for a unique and memorable experience	41%	41%	47%	35%
Experiencing local or regional cuisine	31%	32%	34%	27%
Going to fine dining restaurants for a unique and memorable experience	28%	31%	26%	25%
Driving a wine trail	24%	33% ^{BC}	17%	17%
Sampling traditional artisan products (e.g. cheeses)	20%	24%	22%	13%
Visiting farmers markets	19%	19%	22%	17%
Attending a wine festival	12%	20% ^{BC}	8%	3%
Touring local breweries/Tasting locally brewed beers	12%	16%	10%	8%
Touring local farms (e.g. dairy, grain)	10%	5%	7%	19% ^{AB}
Attending a culinary festival (i.e. chili, cheese, chocolate, etc.)	6%	10%	5%	0%
Taking cooking classes	1%	3%	0%	0%

Activities on Most Recent Wine Trip



- For most of these Wine Travelers, touring wineries and tasting locally made wines is a key activity—meaning it is a main reason they were on that trip.

Food/Wine-Related Activities	Wine Travelers	Key Activity	Secondary Activity
<i>Base: Wine Travelers</i>	(406)		
Touring wineries/Tasting locally made wines	65%	42%	24%
Going to a restaurant "just to eat"	56%	9%	47%
Going to local restaurants (not fine dining) for a unique and memorable experience	41%	16%	25%
Experiencing local or regional cuisine	31%	15%	17%
Going to fine dining restaurants for a unique and memorable experience	28%	13%	14%
Driving a wine trail	24%	10%	13%
Sampling traditional artisan products (e.g. cheeses)	20%	7%	13%
Visiting farmers markets	19%	7%	13%
Attending a wine festival	12%	9%	3%
Touring local breweries/Tasting locally brewed beers	12%	4%	8%
Touring local farms (e.g. dairy, grain)	10%	2%	7%
Attending a culinary festival (i.e. chili, cheese, chocolate, etc.)	6%	2%	4%
Taking cooking classes	1%	1%	1%

Q37. For each of the following activities that you indicated you participated in on a recent trip, please indicate if that activity is something you did as a key activity on that trip (that is, a main reason you were on that trip), or a secondary activity (something that you did on that trip, but not a main reason for your trip). If you have done these activities on multiple trips within the past three years, please think about the most recent trip.

Future Culinary Travel

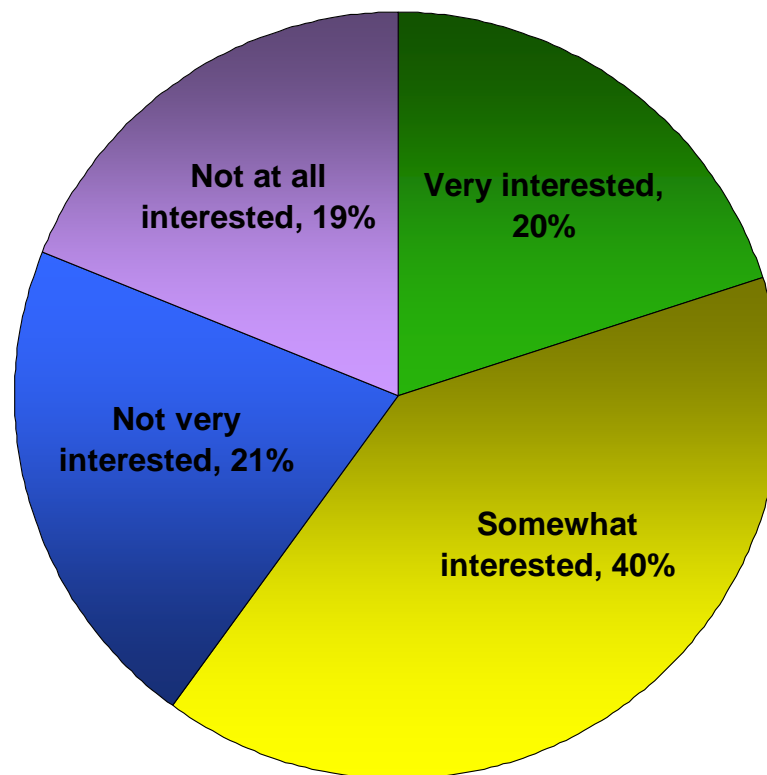
Food-related and/or Wine-related travel

Interest In Future Culinary Travel

- Overall, almost three-fifths of American leisure travelers report they are at least somewhat interested in taking a trip to engage in culinary activities within the next year, while one-fifth are very interested.

Interest in Future Culinary Travel

Base: Leisure Travelers n=2364

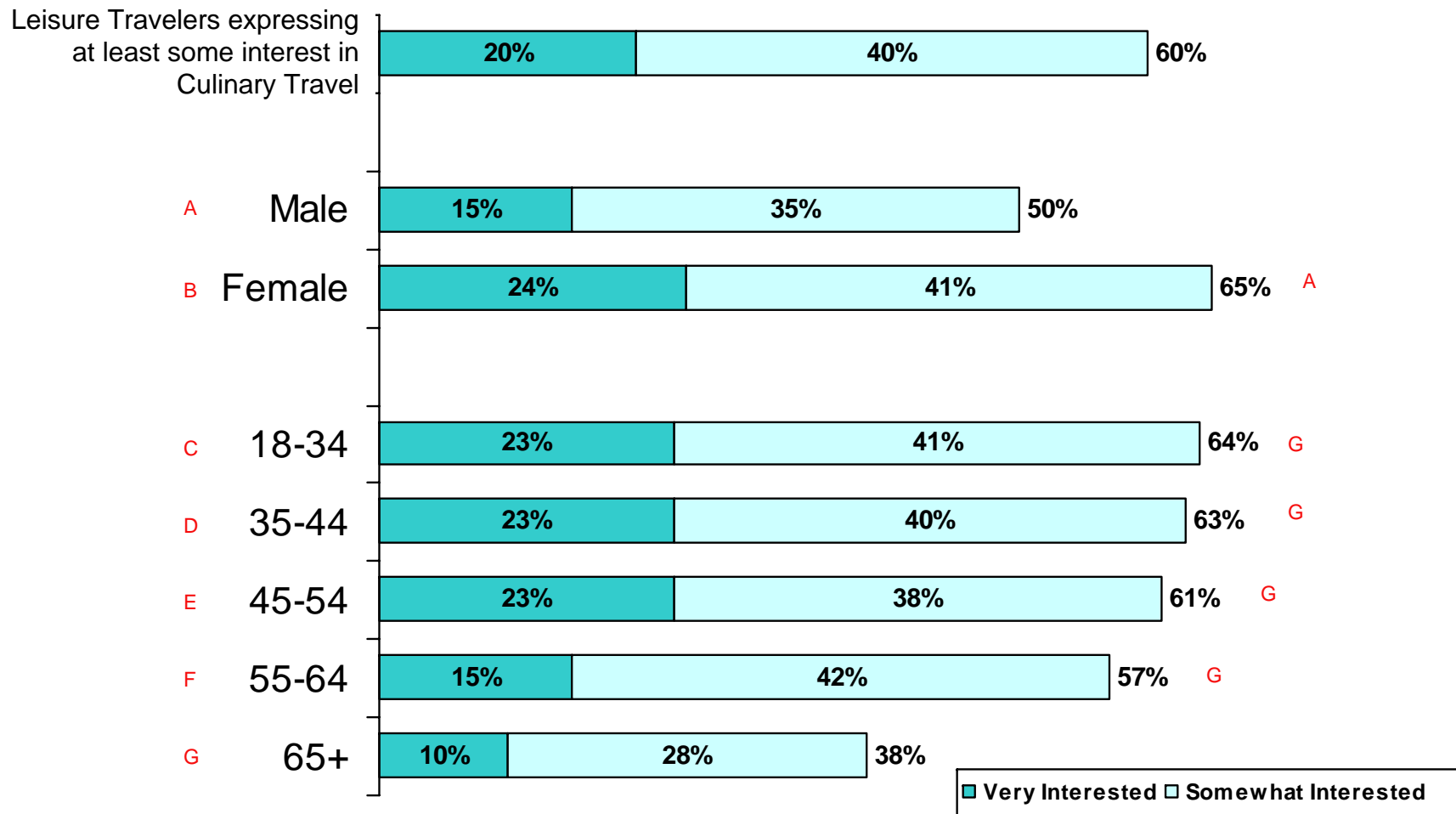


Interest in Culinary Travel by Group

- Culinary travel interest is significantly higher among women than men. While fairly consistent across other age groups, interest in culinary travel is lower among mature travelers.

Total Interest in Culinary Travel among the Leisure Traveler Population

Base: Leisure Travelers n=2364



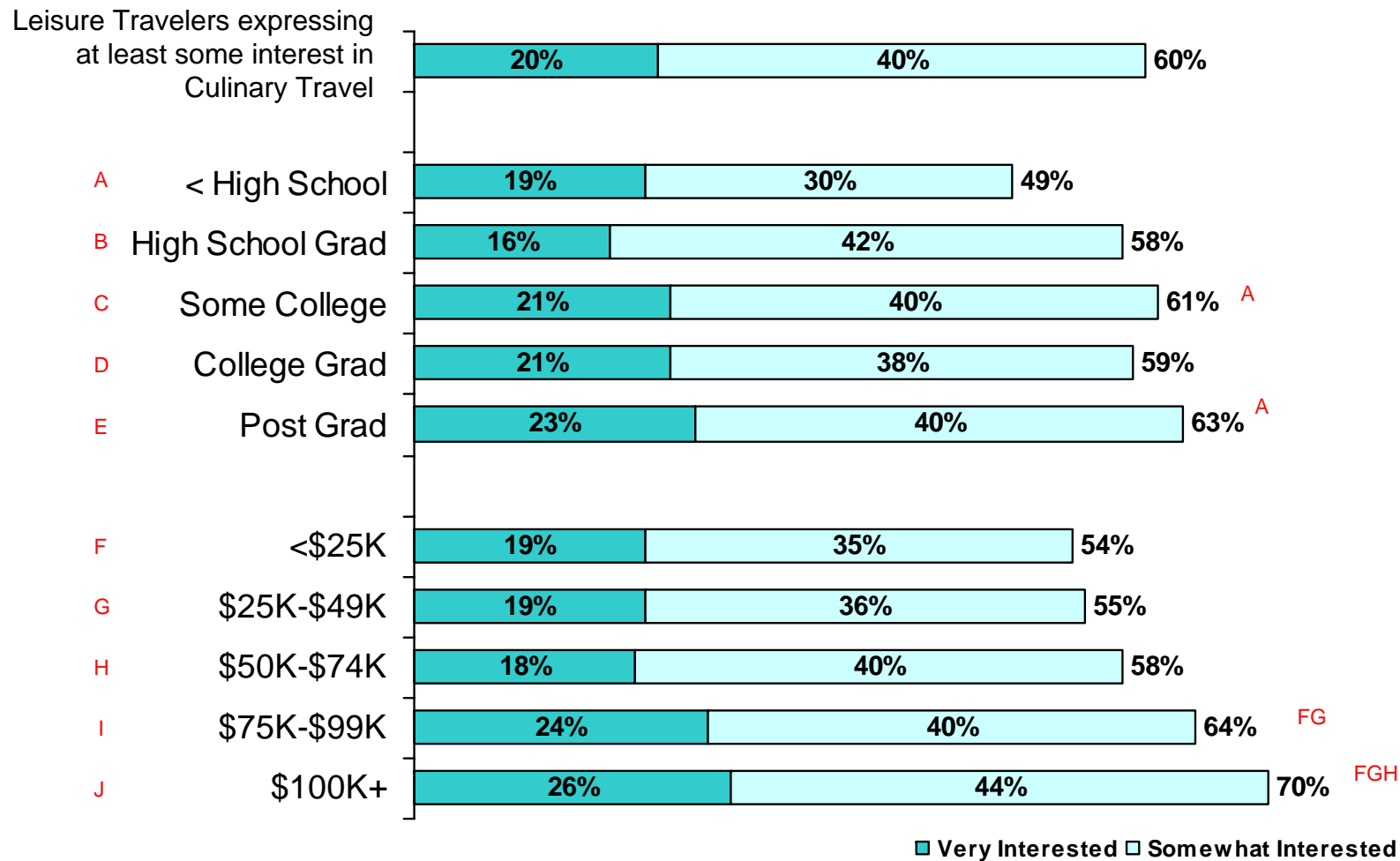
Interest in Culinary Travel by Group



- Consistent with demographics of past Culinary Travelers, future culinary travel interest is higher among those with advanced education and from upper income households.

Total Interest in Culinary Travel among the Leisure Traveler Population

Base: Leisure Travelers n=2364

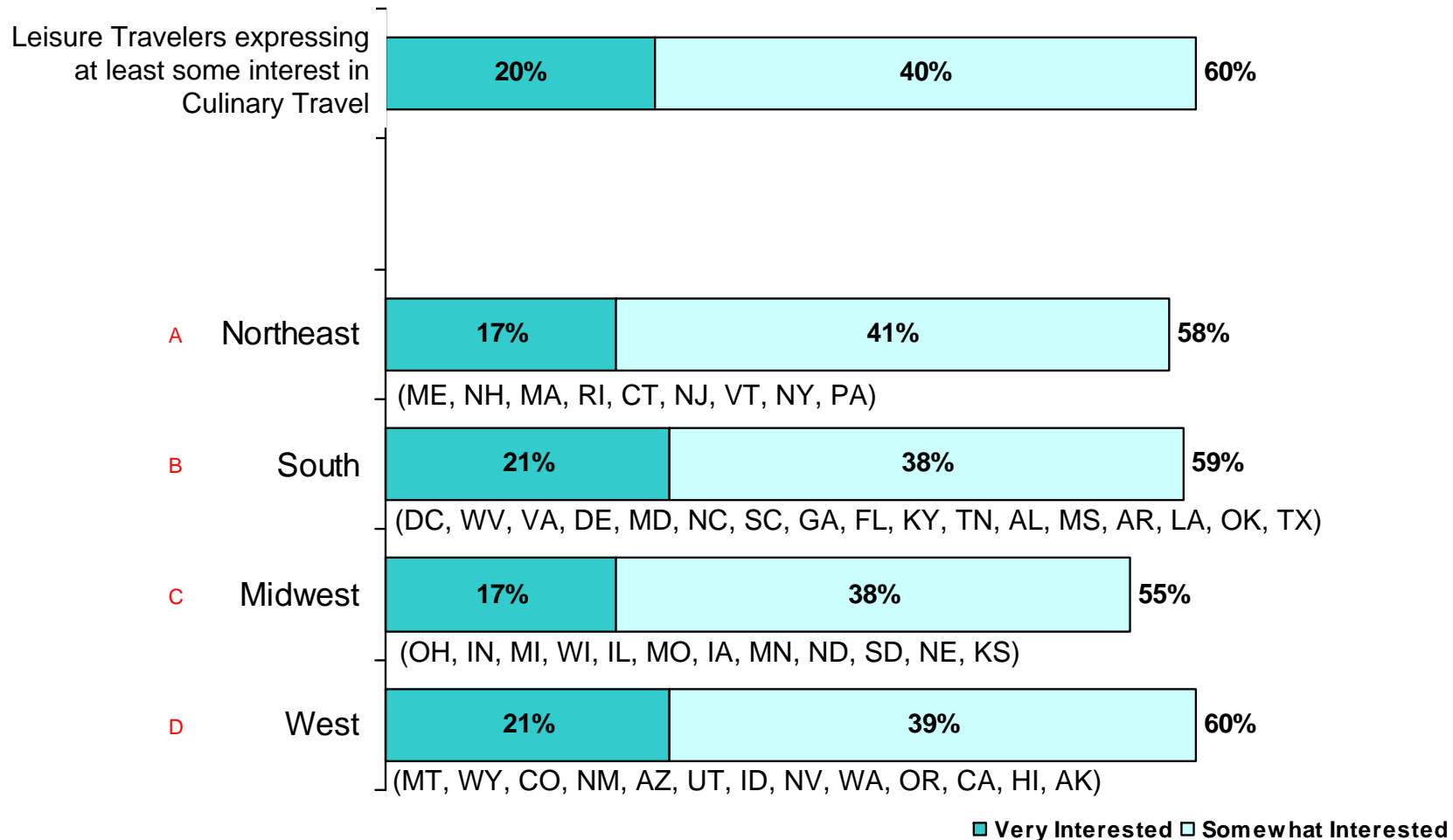


Interest in Culinary Travel by Group

➤ Culinary travel interest is fairly consistent across regional locations of residences.

Total Interest in Culinary Travel among the Leisure Traveler Population

Base: Leisure Travelers n=2364

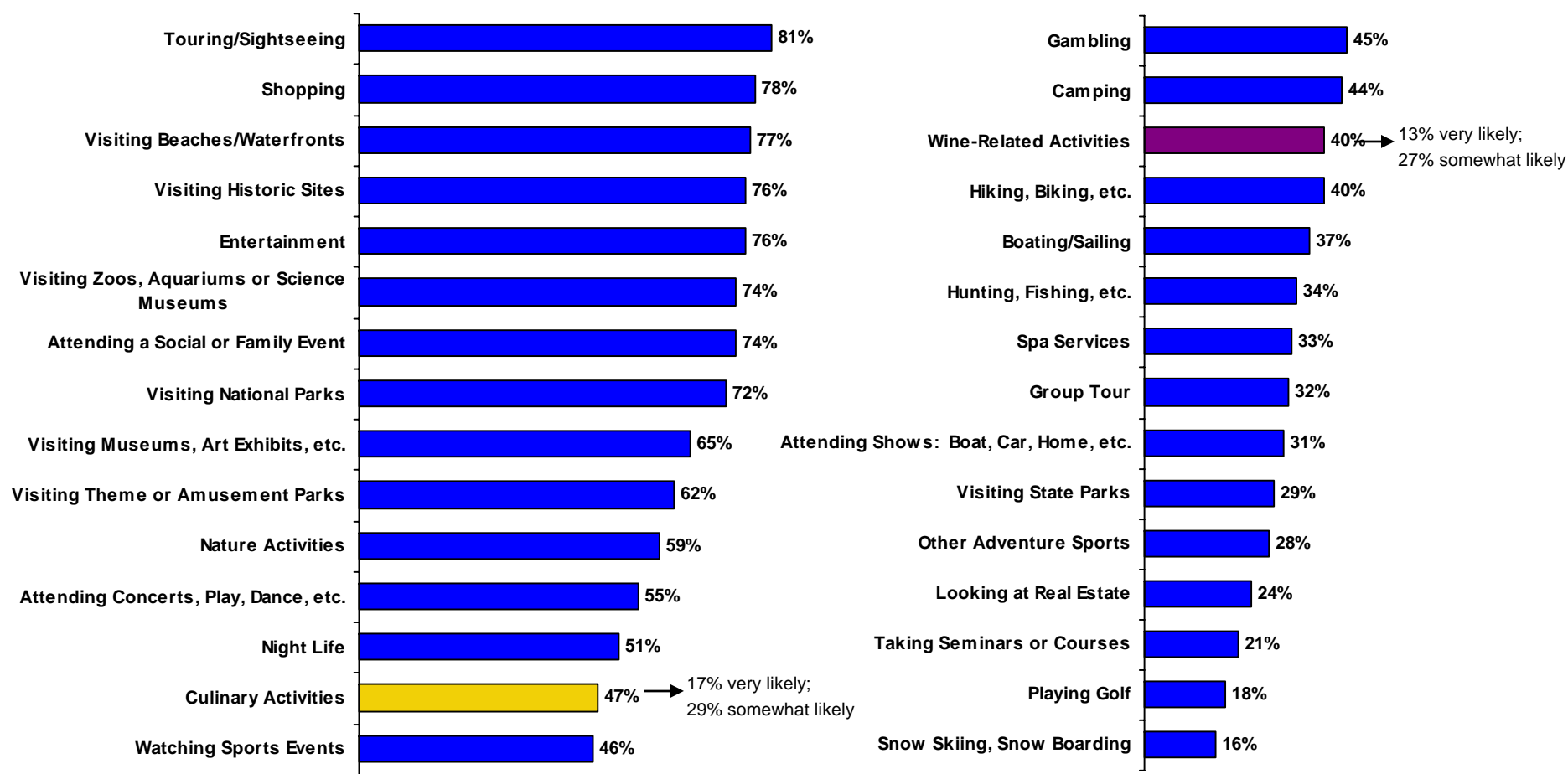


Likelihood to Participate in Future Activity

- Slightly fewer than half of leisure travelers report they are very or somewhat likely to participate in food or wine-related activities on a trip in the future.

Likelihood to Participate in Future Activities: Total Leisure Traveler Population

Base: Leisure Travelers n=2364



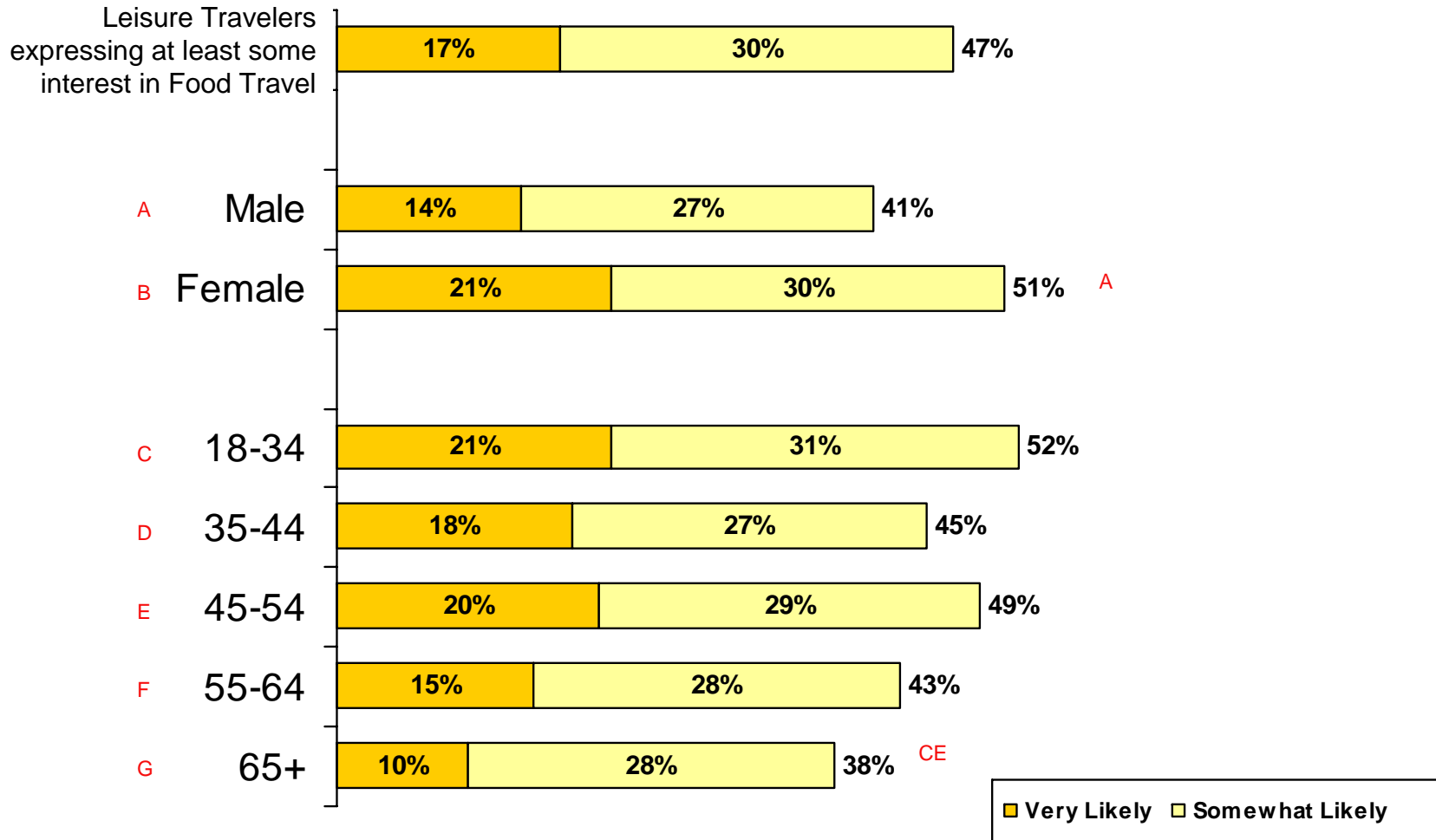
Likelihood of Future Travel Food Activities by Group



- Future food-related travel activity likelihood is significantly higher among women than men, and is lowest among mature travelers.

Total Interest in Food Travel among the Leisure Traveler Population

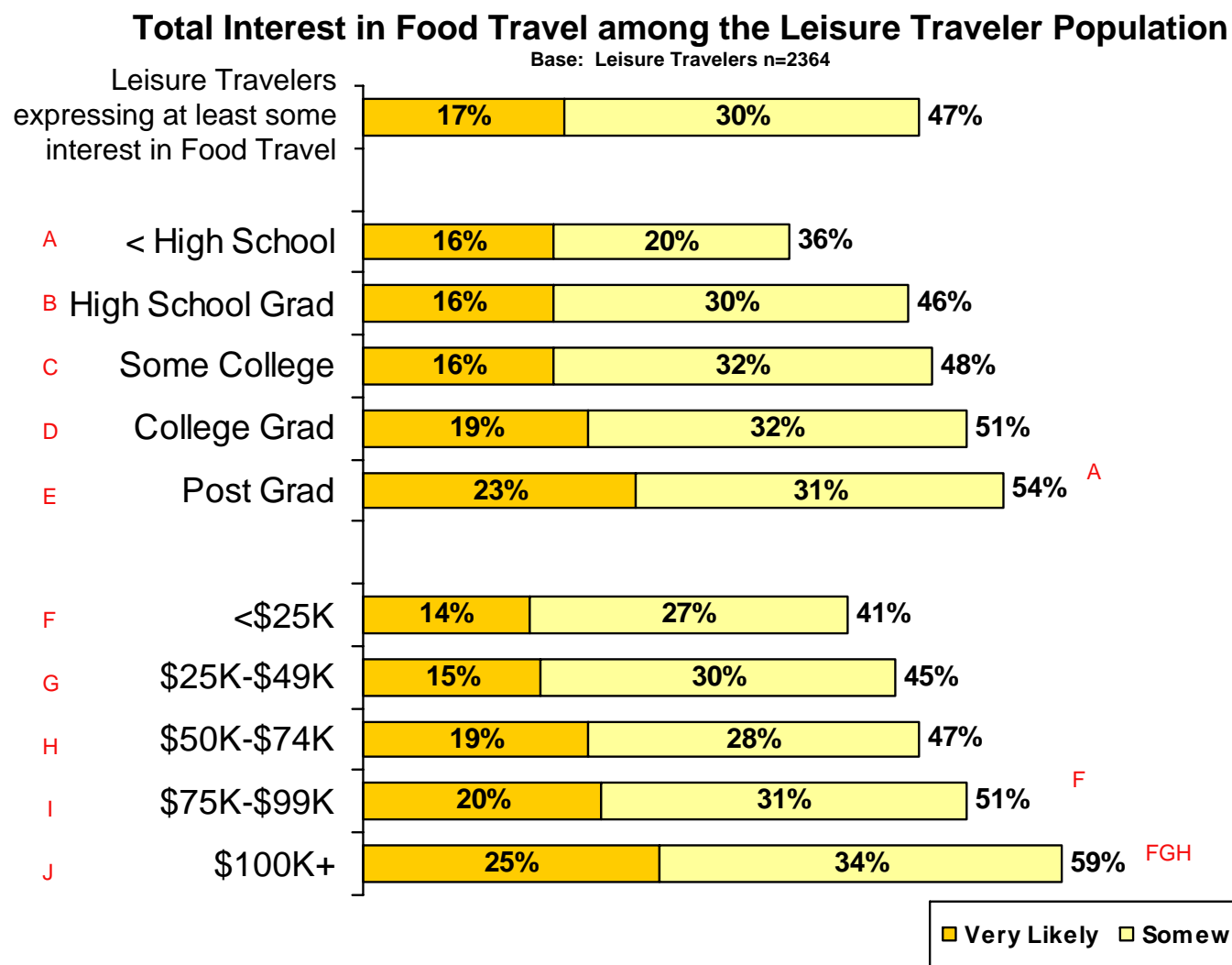
Base: Leisure Travelers n=2364



Q38. Please indicate how likely you are to participate in each type of activity on a trip in the future: Participating in culinary activities (cooking classes, dining out for a unique and memorable experience, farmers markets, gourmet food shopping, etc.) or attending food festivals.

Likelihood of Future Travel Food Activities by Group

- Future food-related travel activity likelihood is higher among those with advanced education and from upper income households.

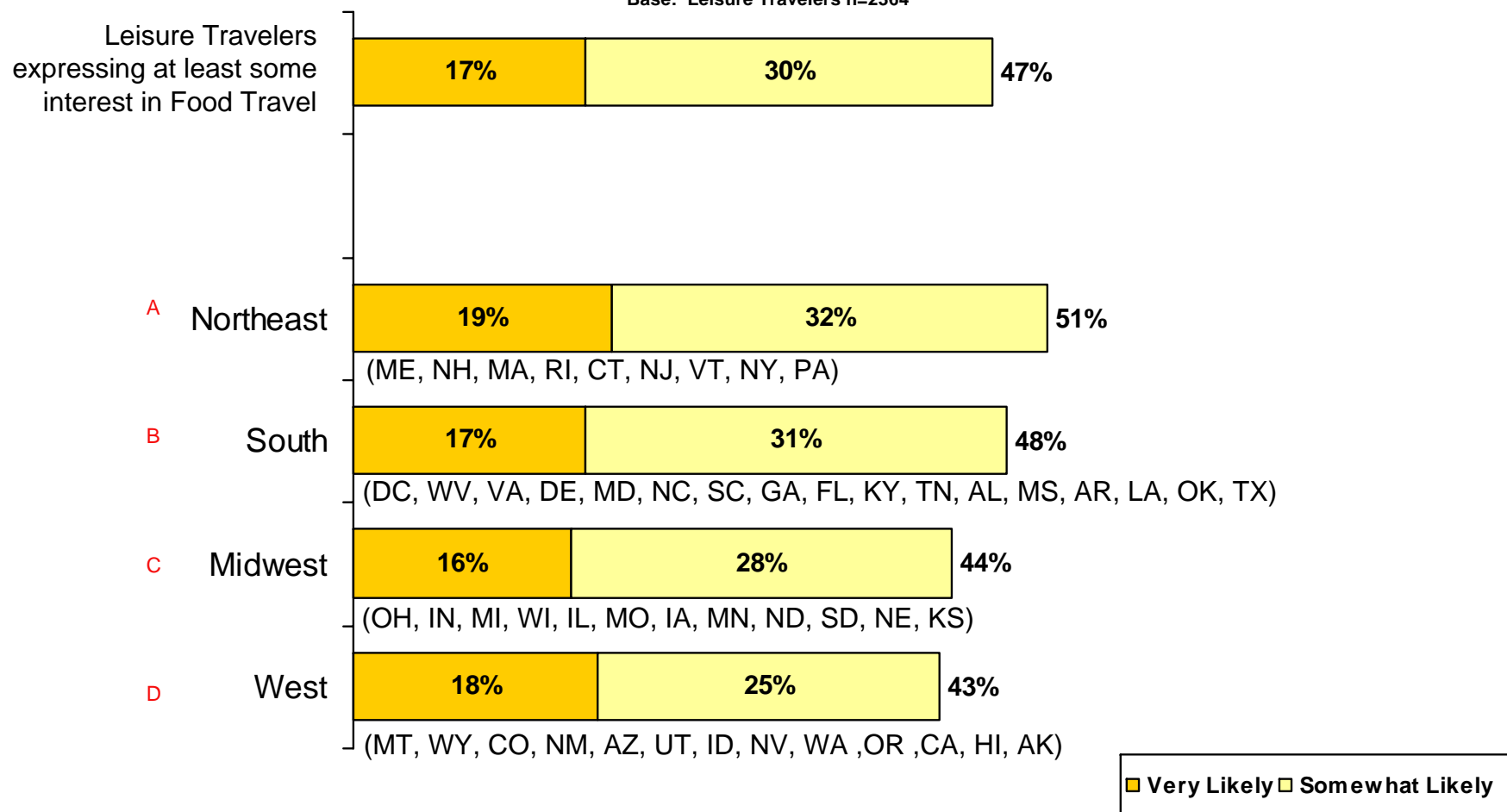


Likelihood of Future Travel Food Activities by Group

- Future food-related travel activity likelihood does not vary significantly across regional locations of residences.

Total Interest in Food Travel among the Leisure Traveler Population

Base: Leisure Travelers n=2364

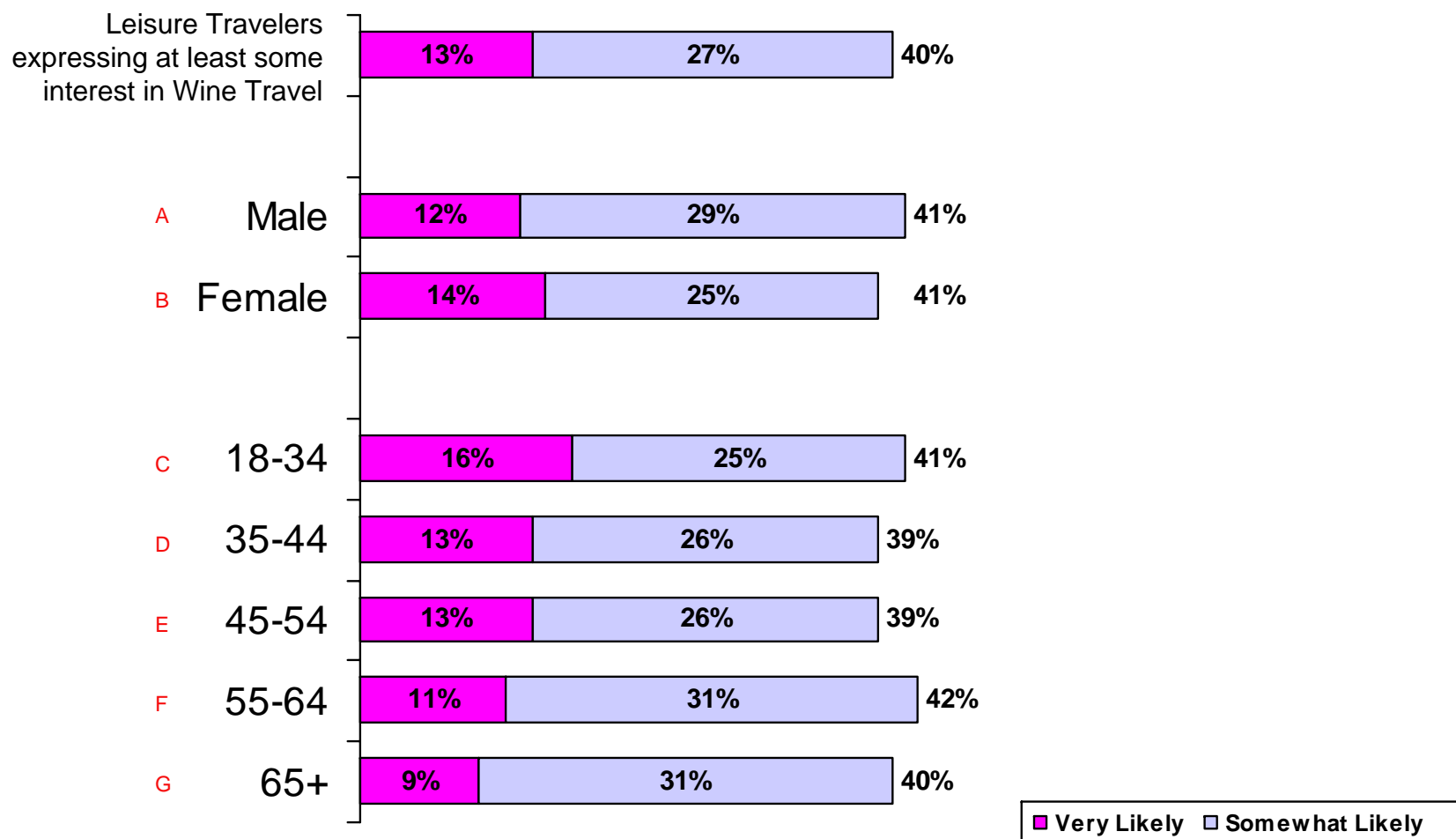


Likelihood of Future Travel Wine Activities by Group

➤ Future wine-related travel activity likelihood does not vary much across age and gender groups.

Total Interest in Wine Travel among the Leisure Traveler Population

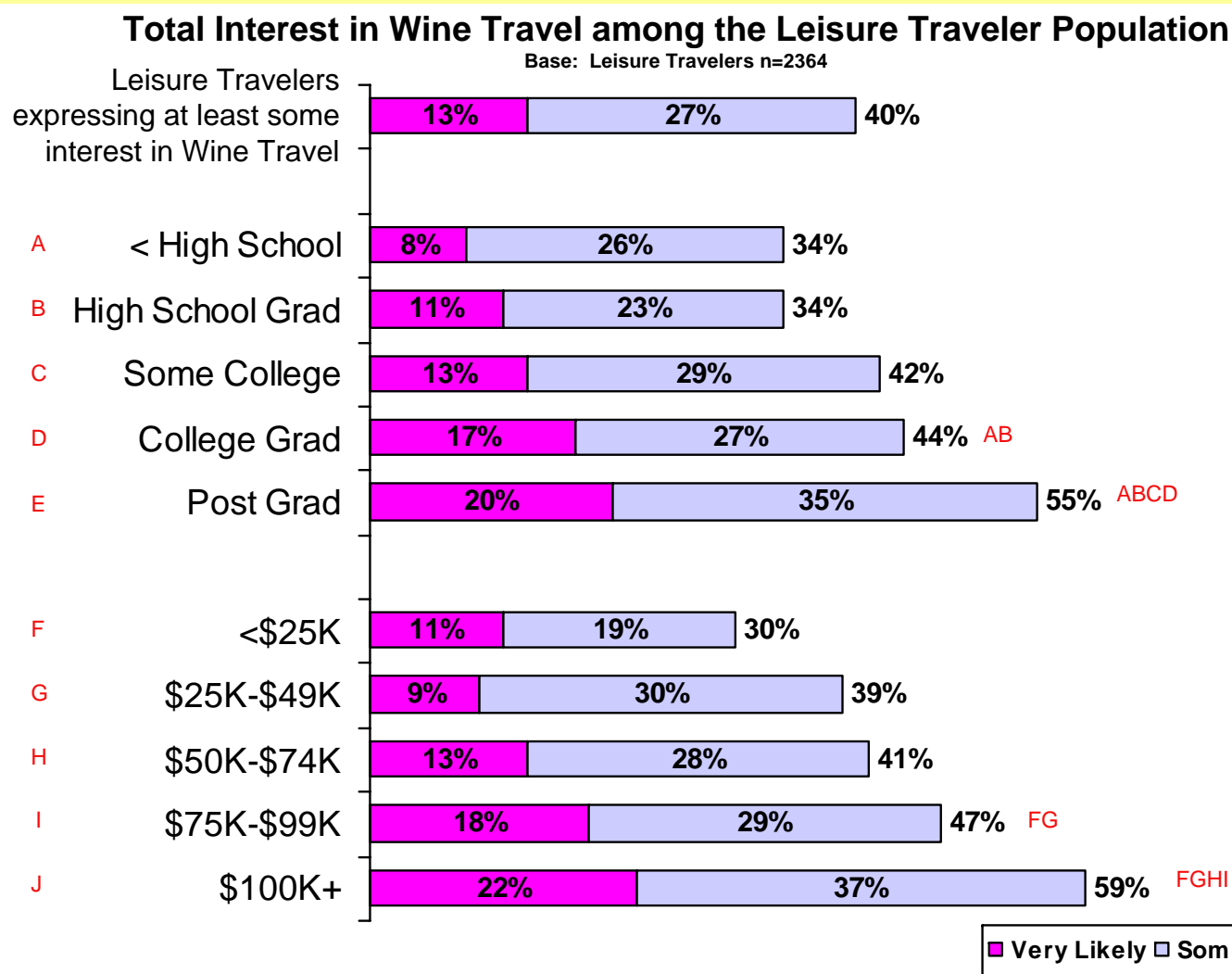
Base: Leisure Travelers n=2364



Q38. Please indicate how likely you are to participate in each type of activity on a trip in the future: Participating in winery tours, driving a wine trail, tasting locally made wines, or attending wine festivals.

Likelihood of Future Travel Wine Activities by Group

- Future wine-related travel activity likelihood is higher among those with advanced education and from upper income households.



Q38. Please indicate how likely you are to participate in each type of activity on a trip in the future: Participating in winery tours, driving a wine trail, tasting locally made wines, or attending wine festivals.

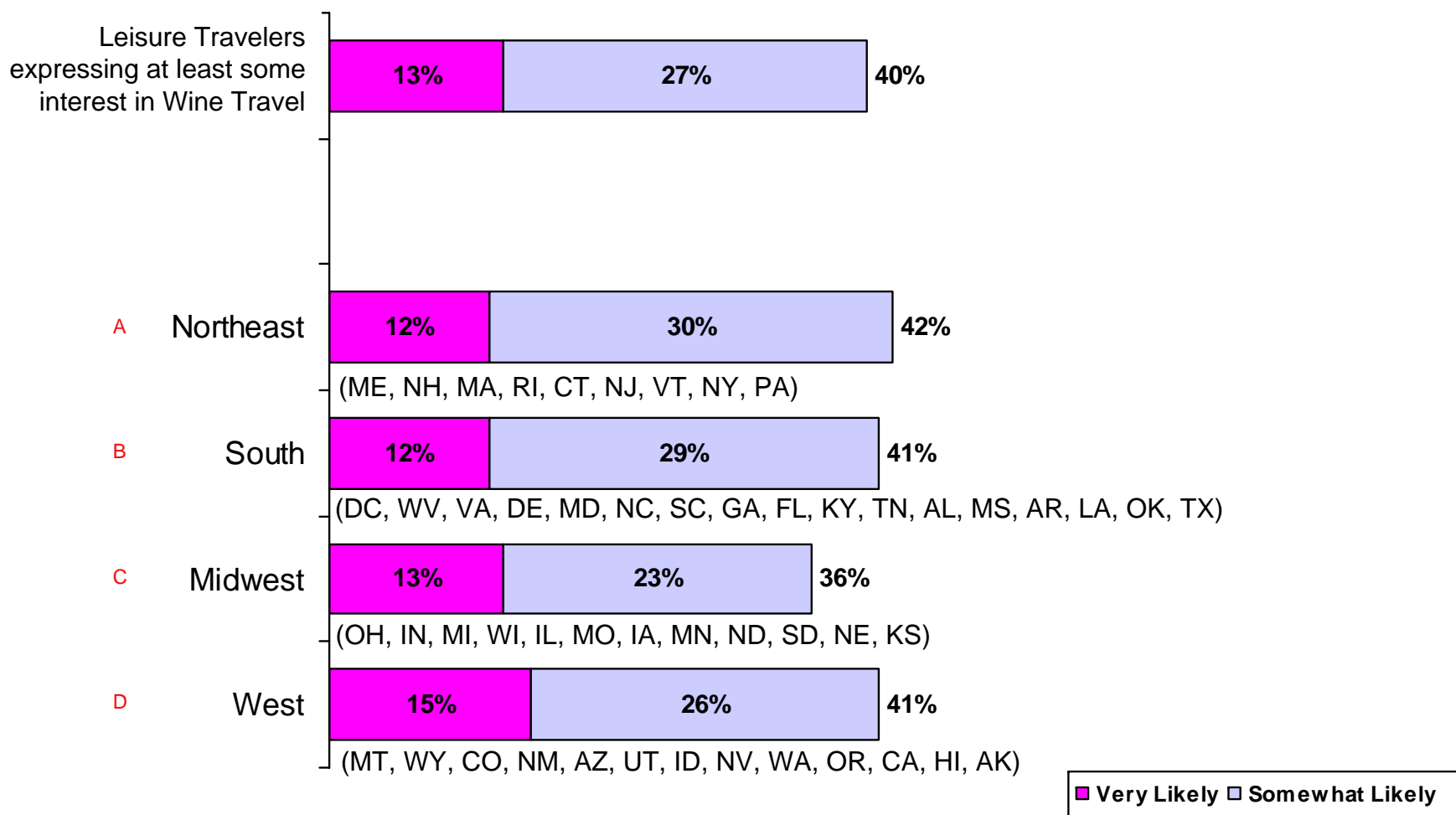
Likelihood of Future Travel Wine Activities by Group



- Future wine-related travel activity likelihood is largely consistent across regional locations of residences.

Total Interest in Wine Travel among the Leisure Traveler Population

Base: Leisure Travelers n=2364



Q38. Please indicate how likely you are to participate in each type of activity on a trip in the future: Participating in winery tours, driving a wine trail, tasting locally made wines, or attending wine festivals.

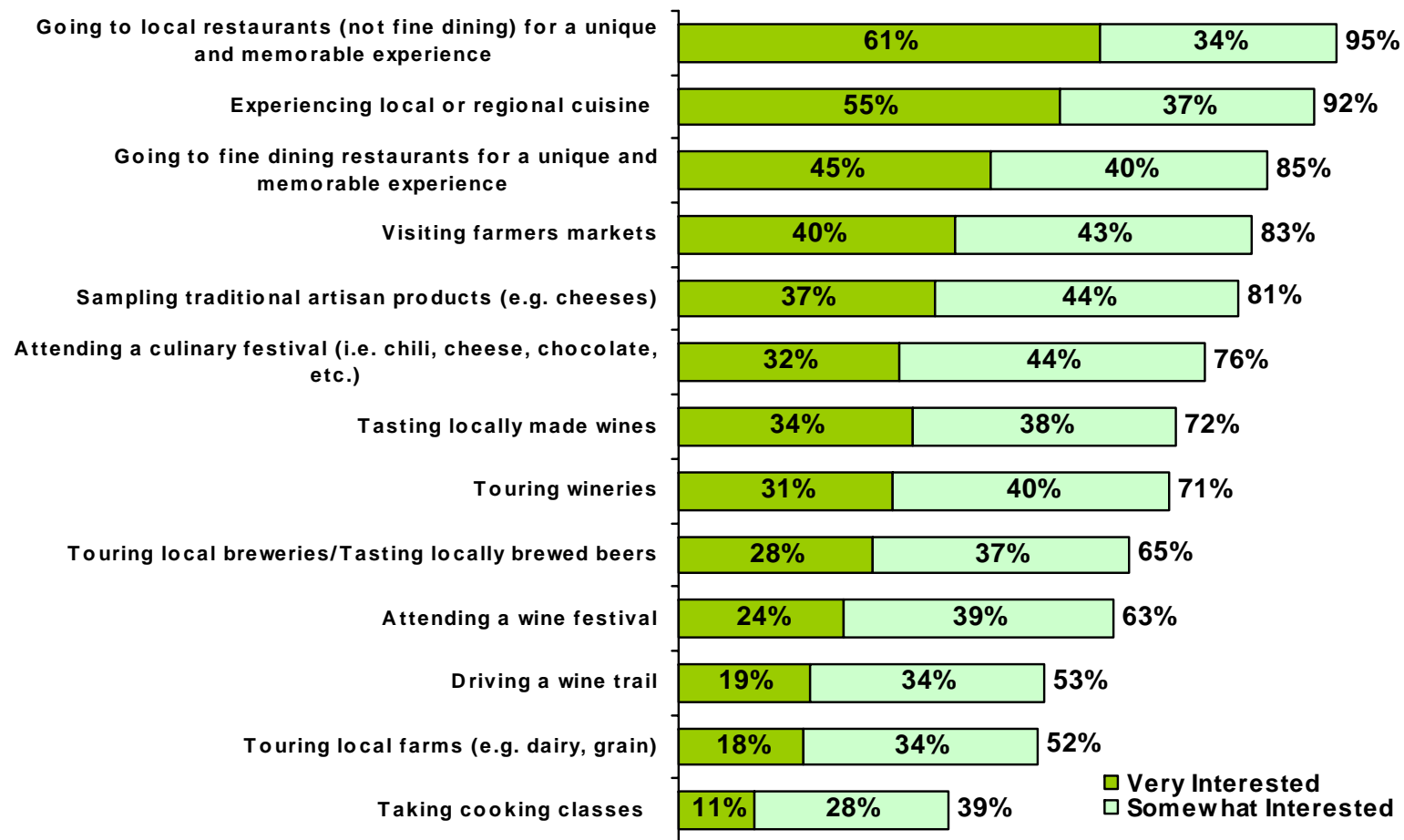
Likelihood To Participate In Specific Culinary Activities



- Among those interested in future culinary activities, going to restaurants for unique and memorable experiences and local/regional cuisine top the list of preferred activities. Large shares also report they are interested in visiting farmers markets, sampling traditional artisan products, and attending culinary festivals.

Participation in Specific Culinary Activities

Base: Leisure Travelers who expressed at least some interest in Future Culinary Travel n=1529



Q39. Thinking more specifically about travel involving culinary and wine activities, please indicate how likely you would be to participate in each type of activity on a trip in the future. **Base** 101 those very/somewhat interested in participating in culinary/wine-related activities in future.

Likelihood To Participate In Specific Culinary Activities



- Respondents are split on whether they anticipate these activities being key activities (i.e. primary drivers) of future trips, or secondary activities—meaning things they do on a trip but not a main reason for the trip.

Food/Wine-Related Activities	Total Likely (Very + Somewhat Likely)	Key Activity	Secondary Activity
<i>Base: Leisure Travelers</i>	(2364)		
Going to local restaurants (not fine dining) for a unique and memorable experience	55%	32%	23%
Experiencing local or regional cuisine	54%	29%	25%
Going to fine dining restaurants for a unique and memorable experience	49%	25%	25%
Visiting farmers markets	48%	18%	30%
Sampling traditional artisan products (e.g. cheeses)	47%	18%	29%
Attending a culinary festival (i.e. chili, cheese, chocolate, etc.)	44%	24%	20%
Tasting locally made wines	42%	21%	21%
Touring wineries	41%	20%	20%
Touring local breweries/Tasting locally brewed beers	38%	16%	22%
Attending a wine festival	36%	17%	19%
Driving a wine trail	31%	12%	19%
Touring local farms (e.g. dairy, grain)	30%	11%	19%
Taking cooking classes	23%	6%	17%

Drivers of Interest in Future Culinary Travel



- Driver analysis indicates that sharing foods/recipes/wines/etc. with friends and family and a desire for regional culinary experiences are the attitudes most highly correlated with interest in future culinary travel.

Correlations* between Interest in Future Culinary Travel and Attitudes Toward Culinary Travel

Base: Leisure Travelers n=2364

I like to bring back regional foods, recipes, wines, etc. from the places I visit and share them with my friends and family	0.57
I want my travel to always be “experiential”, so I make an effort to try regional cuisines, culinary specialties, local wines/spirits, etc.	0.55
I enjoy learning about the local culture and cuisines of the different travel destinations I visit	0.54
I like to try different/new restaurants most nights when I travel to experience a range of local cuisines	0.51
Culinary experiences always have an influence on every trip I take, from deciding on my destination, to choosing which hotel I stay in, to activities I participate in while I’m visiting	0.50
I would choose one travel destination over another based purely on the culinary experiences the destination has to offer	0.50
Food is central to my travel destination selection	0.48
I visit wineries or participate in wine tours because I want to try wines unique to the destination	0.47
I am more inclined to spend more money on food and drink while I am on a trip	0.43
While on a trip, I prefer to select restaurants I am familiar with	-0.12

* Pearson correlations between future culinary travel interest (Q41) and level of agreement with statements (Q52). Higher correlation coefficients indicate that those holding a particular opinion are more likely to be interested in future culinary travel.

Research & Information Sources

Trip Research Sources



- Culinary Travelers are more active information seekers than leisure travelers overall and rely most on word of mouth resources to research a trip to engage in culinary activities, followed by general web searches and 3rd party travel websites.

	Leisure Travelers	Culinary Travelers (Deliberate + Opportunistic + Accidental)	Food Travelers	Wine Travelers
Base:	2364	731	451	406
		A	B	C
Recommendations from friends/family members (word-of-mouth)	57%	66%	70%	63%
General web search, such as with Google or Yahoo	46%	56%	57%	56%
Research on 3rd party travel websites (Orbitz.com, Expedia.com or Travelocity.com)	41%	54%	53%	55%
Go directly to destination websites (excluding Convention & Visitor Bureau sites)	41%	52%	53%	55%
Request that brochures and information be sent to me in the mail	35%	44%	49%	42%
Read travel magazines	26%	40%	42%	40%
Read online reviews by "official sources" of the destination I am thinking of visiting	24%	34%	36%	33%
Read the travel section of my newspaper	19%	29%	30%	30%
Read independently published reviews in magazines and newspapers	14%	26%	29%	25%
Contact convention and visitors bureaus	14%	21%	23%	21%
Consult with a travel agent	14%	17%	20%	15%
Read online reviews such as blogs and other user generated sources	13%	20%	22%	20%
Read Epicurean or culinary magazines	6%	15%	18%	15%
Other	9%	5%	4%	5%

Q47. How do you typically research a trip you plan to take to a destination where you can engage in culinary (cooking classes, dining out for a unique and memorable experience, farmers markets, gourmet food shopping, food festivals, etc.) or wine-related activities within the United States? Please select all that apply.

Trip Research Sources



- Serious Culinary Travelers (Deliberates & Opportunistics) are most likely to rely on a variety of sources vs. the total leisure traveler. In particular, word of mouth and online resources are key when researching a trip to engage in culinary activities.

	Leisure Travelers	Culinary Travelers	Food Travelers	Wine Travelers
		(Deliberate + Opportunistic)		
Base:	2364	630	390	348
		A	B	C
Recommendations from friends/family members (word-of-mouth)	57%	65%	69%	64%
General web search, such as with Google or Yahoo	46%	59%	59%	61%
Research on 3rd party travel websites (Orbitz.com, Expedia.com or Travelocity.com)	41%	54%	51%	58%
Go directly to destination websites (excluding Convention & Visitor Bureau sites)	41%	55%	54%	62%
Request that brochures and information be sent to me in the mail	35%	46%	51%	44%
Read travel magazines	26%	45%	45%	47%
Read online reviews by "official sources" of the destination I am thinking of visiting	24%	37%	36%	41%
Read the travel section of my newspaper	19%	31%	31%	34%
Read independently published reviews in magazines and newspapers	14%	30%	32%	30%
Contact convention and visitors bureaus	14%	23%	23%	26%
Consult with a travel agent	14%	19%	21% C	15%
Read online reviews such as blogs and other user generated sources	13%	22%	24%	24%
Read Epicurean or culinary magazines	6%	18%	21%	19%
Other	9%	3%	4%	2%

Q47. How do you typically research a trip you plan to take to a destination where you can engage in culinary (cooking classes, dining out for a unique and memorable experience, farmers markets, gourmet food shopping, food festivals, etc.) or wine-related activities within the United States? Please select all that apply.

Publications Typically Read

- Among the tested media options presented in the table below, Food and Wine Travelers are most likely to be reading newspapers, but also report above average usage of food and wine-related publications.

	Leisure	Cul	Food	Wine		Leisure	Cul	Food	Wine
Base:	2364	731	451	406	Base:	2364	731	451	406
		(Delib + Opp + Acc)					(Delib + Opp + Acc)		
		A	B	C			A	B	C
Daily newspaper	49%	49%	52%	46%	Bon Appetit	12%	22%	27%	20%
Weekend edition of newspaper	31%	41%	42%	43%	General interest or city life mag (New Yorker)	8%	13%	16%	12%
Food section of newspaper	29%	41%	44%	40%	Cooks Illustrated	6%	9%	12%	7%
Travel section of weekend newspaper	29%	41%	40%	44%	Travel magazines	6%	9%	10%	10%
Travel section of newspaper	28%	40%	39%	43%	Zagats	5%	11%	11%	13%
Community newspaper	27%	32%	36%	30%	Other food or wine magazines	5%	12%	14%	11%
Other food or wine websites	21%	27%	28%	30%	Epicurious.com	5%	10%	9%	12%
Other newspapers	18%	20%	23%	18%	Wine Spectator	5%	13%	13%	17%
News magazines (Time)	18%	27%	29%	27%	Wine.com	4%	4%	5%	5%
Hobby magazines	16%	20%	23%	18%	WineEnthusiast.com	3%	4%	4%	4%
Cooking Light	16%	22%	24%	22%	Email alerts from travel co.'s	3%	10%	9%	13%
Sports magazines	13%	16%	15%	16%	The Wine Advocate	3%	6%	6%	7%
Fashion/homemaking magazines	12%	19%	23%	16%	Saveur	2%	4%	4%	4%
Gourmet	12%	20%	24%	18%					

Publications Typically Read



- Among the tested media options listed in the table below, Serious Culinary Travelers (Deliberates & Opportunistics) are most likely to be reading newspapers. In general, Culinary Travelers are reading more publications than the leisure traveler population as a whole, especially those related to food and wine.

	Leisure	Cul	Food	Wine		Total	Cul	Food	Wine
Base:	2364	630	390	348	Base	2364	630	390	348
		(Deliberate + Opportunistic)					(Deliberate + Opportunistic)		
		A	B	C			A	B	C
Daily newspaper	49%	49%	52%	45%	Bon Appetit	12%	26%	31% ^C	24%
Weekend edition of newspaper	31%	43%	46%	44%	General interest or city life mag (New Yorker)	8%	15%	16%	15%
Food section of newspaper	29%	44%	46%	44%	Cooks Illustrated	6%	11%	14%	9%
Travel section of weekend newspaper	29%	43%	42%	48%	Travel magazines	6%	10%	11%	11%
Travel section of newspaper	28%	41%	40%	44%	Zagats	5%	14%	12%	17%
Community newspaper	27%	33%	36%	31%	Other food or wine magazines	5%	13%	17%	13%
Other food or wine websites	21%	28%	27%	34%	Epicurious.com	5%	10%	10%	12%
Other newspapers	18%	21%	24%	19%	Wine Spectator	5%	16%	15%	20%
News magazines (Time)	18%	29%	29%	28%	Wine.com	4%	5%	6%	5%
Hobby magazines	16%	21%	24%	19%	WineEnthusiast.com	3%	4%	4%	4%
Cooking Light	16%	25%	27%	24%	Email alerts from travel co.'s	3%	12%	12%	15%
Sports magazines	13%	15%	14%	16%	The Wine Advocate	3%	8%	8%	9%
Fashion/homemaking magazines	12%	19%	21%	16%	Saveur	2%	5%	6%	5%
Gourmet	12%	22%	26%	22%					

Appendix

Profile of Traveler Groups



	Leisure Travelers	Cul (Food OR Wine)	Food	Wine	Food AND Wine		Leisure Travelers	Cul (Food OR Wine)	Food	Wine	Food AND Wine
Sample size	2364	731	451	406	126	Sample size	2364	731	451	406	126
		A	B	C	D			A	B	C	D
Male	46%	46%	42%	49%	40%	Children in household	38%	31%	36%	27%	32%
Female	54%	54%	58%	51%	60%	No children in household	62%	69%	64%	73%	68%
Age											
18-34	30%	30%	34%	27%	37%	Home Ownership					
35-44	19%	21%	23%	20%	23%	Own	67%	70%	67%	73%	71%
45-54	19%	19%	18%	18%	12%	Rent	31%	29%	31%	27%	26%
55-64	15%	16%	17%	17%	22%	Not sure	3%	1%	2%	1%	3%
65+	16%	13%	8%	17%	5%						
						Household Income					
Marital Status						<\$25,000	18%	12%	14%	9%	7%
Single, never married	16%	18%	19%	15%	11%	\$25,000-\$49,999	27%	22%	23%	21%	22%
Living with significant other	11%	11%	11%	11%	16%	\$50,000-\$74,999	19%	21%	22%	18%	17%
Married	59%	61%	60%	62%	62%	\$75,000-\$99,999	14%	17%	15%	20%	19%
Divorced/Separated	10%	8%	8%	8%	9%	\$100,000 +	12%	19%	17%	24%	27%
Widowed	3%	2%	2%	3%	3%	Refused	10%	9%	9%	8%	8%

***Leisure Travelers:** those who have taken a pleasure, vacation or personal trip away from home of at least 50 miles or where they spent at least one overnight in the past 12 months AND who have/share responsibility for trip planning.

Profile of Traveler Groups



	Leisure Travelers	Cul (Food OR Wine)	Food	Wine	Food AND Wine		Leisure Travelers	Cul (Food OR Wine)	Food	Wine	Food AND Wine
Sample size	2364	731	451	406	126	Sample size	2364	731	451	406	126
		A	B	C	D			A	B	C	D
Education						Employment status					
High school or less	16%	7%	7%	4%	0%	Employed full-time	42%	47%	47%	49%	57%
Graduated high school	27%	21%	21%	20%	17%	Employed part-time	12%	13%	14%	12%	11%
Some college	27%	29%	29%	27%	21%	Full-time homemaker	12%	10%	10%	8%	5%
Graduated college	20%	27%	27%	28%	35%	Full-time student	2%	3%	4%	2%	2%
College post graduate	10%	17%	16%	20%	27%	Retired	18%	16%	12%	20%	12%
Region						Unemployed	8%	6%	7%	6%	6%
Northeast	18%	17%	16%	18%	19%	Other	3%	3%	3%	3%	3%
South	36%	38%	36%	36%	28%	Not sure/Rather not say	2%	2%	3%	1%	4%
Midwest	23%	19%	21%	18%	22%						
West	23%	27%	27%	28%	31%						

***Leisure Travelers:** those who have taken a pleasure, vacation or personal trip away from home of at least 50 miles or where they spent at least one overnight in the past 12 months AND who have/share responsibility for trip planning.

Profile of Traveler Groups (Deliberate & Opportunistic Only)



	Leisure Travelers	Cul (Food OR Wine)	Food	Wine	Food AND Wine		Leisure Travelers	Cul (Food OR Wine)	Food	Wine	Food AND Wine
		(Deliberate + Opportunistic)						(Deliberate + Opportunistic)			
Sample size	2364	630	390	348	122	Sample size	2364	630	390	348	122
		A	B	C	D			A	B	C	D
Male	46%	46%	42%	50%B	41%	Children in household	38%	31%	34%	27%	33%
Female	54%	54%	58%C	50%	59%	No children in household	62%	69%	66%	73%	67%
Age											
18-34	30%	31%	32%	29%	35%	Home Ownership					
35-44	19%	22%	22%	21%	24%	Own	67%	72%	70%	76%	76%
45-54	19%	20%	19%	19%	13%	Rent	31%	27%	27%	24%	23%
55-64	15%	17%	18%	17%	22%	Not sure	3%	1%	2%	0%	2%
65+	16%	10%	7%	12%D	5%						
						Household Income					
Marital Status						<\$25,000	18%	14% ^D	16% ^{CD}	9%	7%
Single, never married	16%	19% ^D	18% ^D	17%	10%	\$25,000-\$49,999	27%	22%	23%	20%	21%
Living with significant other	11%	10%	11%	12%	15%	\$50,000-\$74,999	19%	20%	21%	18%	18%
Married	59%	60%	61%	61%	66%	\$75,000-\$99,999	14%	18%	15%	22% ^B	20%
Divorced/Separated	10%	8%	8%	8%	8%	\$100,000 +	12%	20%	18%	25%	29% ^B
Widowed	3%	1%	1%	2%	1%	Refused	10%	7%	7%	6%	4%

*Leisure Travelers: those who have taken a pleasure, vacation or personal trip away from home of at least 50 miles or where they spent at least one overnight in the past 12 months AND who have/share responsibility for trip planning.

Profile of Traveler Groups (Deliberate & Opportunistic Only)



	Leisure Travelers	Cul (Food OR Wine)	Food	Wine	Food AND Wine		Leisure Travelers	Cul (Food OR Wine)	Food	Wine	Food AND Wine
		(Deliberate + Opportunistic)						(Deliberate + Opportunistic)			
Sample size	2364	630	390	348	122	Sample size	2364	630	390	348	122
		A	B	C	D			A	B	C	D
Education						Employment status					
High school or less	16%	9%	9%	6%	0%	Employed full-time	42%	47%	45%	52%	57% ^B
Graduated high school	27%	20%	21%	17%	16%	Employed part-time	12%	13%	14%	11%	12%
Some college	27%	26%	27%	25%	21%	Full-time homemaker	12%	9%	10%	6%	5%
Graduated college	20%	27%	26%	30%	36%	Full-time student	2%	4%	6% ^C	2%	2%
College post graduate	10%	17%	17%	23%	27% ^B	Retired	18%	15%	11%	18% ^B	13%
Region						Unemployed	8%	7%	7%	6%	7%
Northeast	18%	16%	15%	18%	17%	Other	3%	3%	3%	3%	3%
South	36%	34%	37%	30%	30%	Not sure/Rather not say	2%	2%	4% ^C	1%	1%
Midwest	23%	21%	22%	20%	23%						
West	23%	29%	26%	32%	30%						

***Leisure Travelers:** those who have taken a pleasure, vacation or personal trip away from home of at least 50 miles or where they spent at least one overnight in the past 12 months AND who have/share responsibility for trip planning.