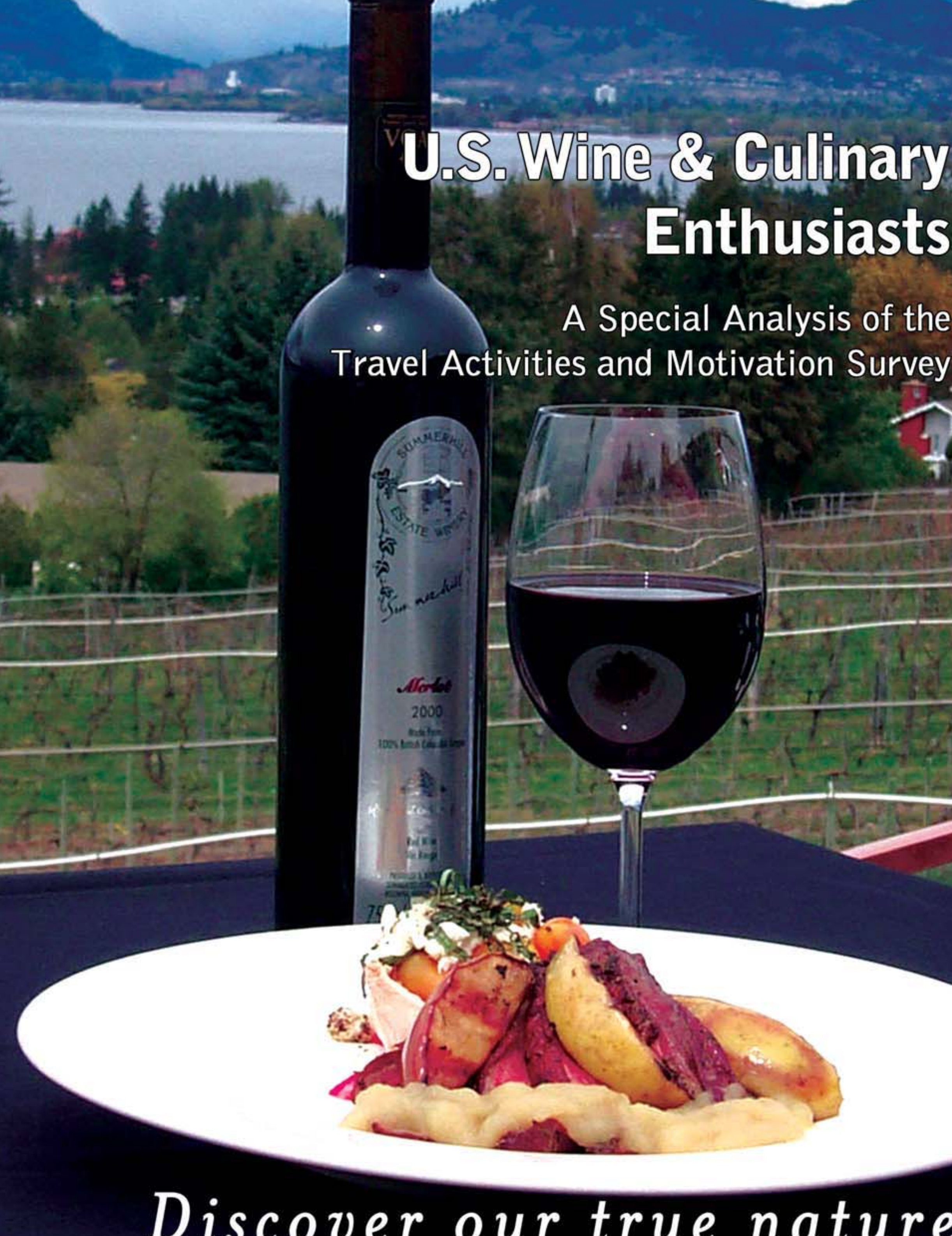

U.S. Wine & Culinary Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey

TAMS

Discover our true nature

Canadian Tourism Commission

Commission canadienne du tourisme

Canada

U.S. Wine & Culinary Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey (TAMS)

Prepared for:

The Canadian Tourism Commission (CTC)

Prepared by:

Research Resolutions & Consulting Ltd.

National Library of Canada cataloguing in publication data

Main entry under title :

U.S. wine & culinary enthusiasts

Issued also in French under title: Touristes américains adeptes
du vin et des expériences culinaires.
"A special analysis of the Travel activities and Motivation
Survey (TAMS)"
ISBN 0-662-33885-5
Cat. no. C86-156/2003E

1. Heritage tourism–Canada.
2. Cookery–Economic aspects–Canada.
3. Americans–Travel.

I. Research Resolutions & Consulting Ltd.
II. Canadian Tourism Commission.

G155.C3C32 2003 338.4'79104648 C2003-980143-8

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1. Introduction

Canada offers a wide range of tourism experiences to potential travellers from the United States. In order to obtain a better understanding of the size, characteristics and interests of American activity-based market segments, the Canadian Tourism Commission (CTC) commissioned Research Resolutions & Consulting Ltd. to undertake special analyses and reports based on the Travel Activities and Motivation Survey (TAMS). This report focuses on **Wine & Culinary Enthusiasts** – Americans who have had some recent Canadian tourism experience and exhibit a particular interest in fine foods and wine. As such, they have taken leisure trips to Canada and, in most cases, to other destinations in the past couple of years, and have engaged in the following activities on these trips.

Any one of the following:

- Stay at cooking school
- Stay at wine tasting school
- Stay at gourmet restaurant with accommodation on the premises

Or any two of the following:

- Tour a region's wineries
- Go to wineries for day visits
- Dine at internationally acclaimed restaurants

These tourists provide a rich source of information for tourism businesses and marketers who want to increase or retain the Wine & Culinary Enthusiast market from the U.S.A. in the future.

In addition to a *current* profile of Wine & Culinary Enthusiasts, the TAMS survey has been modified to permit an assessment of the impacts of an aging population on market potential for this group. Using population projections for the U.S.A. obtained from the U.S. Census Bureau, TAMS data were "aged" twenty-five years into the future. Comparisons of the market size, composition, and travel behaviour of Americans in 2000 with estimates of the market profile in 2025 provide tourism planners and marketers with critical information about the products and services that may be required in the future to attract tourists from Canada's largest foreign market. Chapter 4 of this report is devoted to the impacts of population changes on the U.S.A. Wine & Culinary Enthusiasts market.

Additional reports, featuring profiles of other outdoor and cultural segments in the United States and Canada are available from the CTC. Topics include Soft Outdoor and Hard Outdoor Adventure Enthusiasts, Visual Arts, and Performing Arts Enthusiasts, Heritage Enthusiasts, Winter Outdoor Activity Participants, and Alpine Ski Tourists.

2. Executive Summary

2.1 Wine & Culinary Enthusiasts: Market Size

Of the 200.4 million American adults in 2000, about 21.6 million are Wine & Culinary Enthusiasts (11%). Of these, about 1-in-4 claim to have taken a leisure trip within Canada during the past two years or so. Thus, Canada's market for the wine and culinary segment is approximately 5.5 million American adults.

Canada draws a disproportionately high number of its Wine & Culinary Enthusiasts from border states: 18 per cent of the total U.S.A. population lives in states on the Canada/U.S. border while 30 per cent of Wine & Culinary Enthusiasts who come to Canada do so. Attracting these tourists from long haul U.S.A. markets poses a greater challenge: 54 per cent of Americans live in Tier III states but only 38 per cent of Wine & Culinary Enthusiasts who come to Canada live in this southern band of states.

Wine & Culinary Enthusiasts travel to Canada's regions in much the same way as do Americans with any recent Canadian experience. As such, they are most apt to have visited Ontario in the past couple of years (61%), followed by Quebec (33%) and British Columbia (29%). Smaller proportions visit Atlantic Canada (16%) and the Prairie provinces – Alberta (10%) and Manitoba/Saskatchewan (7%).

The single exception to the "typical" destination pattern for Americans who come to Canada on leisure trips is Quebec. Possibly because of the reputation of French foods and wine, and the European "flavour" of parts of Quebec City and Old Montréal, one-third of Wine & Culinary Enthusiasts from the U.S.A. are drawn to Quebec but only one-quarter of the general American travelling public that comes to Canada includes Quebec on its itineraries.

There is an especially robust competitive environment for Canada within the Wine & Culinary Enthusiasts segment. These tourists display an almost universal tendency to take leisure trips *within* the United States (96%) and are also apt to travel to Mexico or the Caribbean (31%). They have a particularly strong interest in Europe (27%) and destinations in other countries (21%). These rates of foreign travel, and particularly to Europe and other countries, are appreciably higher than those found within the American market for Canada as a whole.

2.2 Wine & Culinary Enthusiasts: Demographic Characteristics

Compared to the total market for all leisure tourism experiences over the past couple of years, Wine & Culinary Enthusiasts are substantively under-represented among younger Americans, and especially among those between 18 and 34 years. This age group represents 1-in-4 U.S.A. travellers as a whole (24%) but less than 1-in-5 Wine & Culinary Enthusiasts (19%). This finding is consistent with a drinking age of twenty-one in the U.S.A. and the relative affluence required to pursue interests in fine wines and gourmet foods.

Most Wine & Culinary Enthusiasts live in adult-only households – those with no members under the age of eighteen. Only about one-fifth are likely to be in the market for tourism experiences that take into account the interests and needs of teenagers or children (22%).

Wine & Culinary Enthusiasts are also more affluent than is the "typical" American traveller in Canada, with an average household income of $76,600 (US$) compared to $65,200 (US$) for the typical leisure visitor to Canada (1998 dollars). Higher household incomes are consistent with higher levels of formal education: over one-third of Wine & Culinary Enthusiasts have at least one university degree (37%) and a further one-half (47%) have had some other form of post-secondary education.

2.3 Wine & Culinary Activities

Of the activities used to define Wine & Culinary Enthusiasts, *day visits to wineries* has the largest following. Over 8-in-10 of these enthusiasts claim to have participated in this activity on a leisure trip in the past couple of years. Other popular defining activities include touring a region's wineries and dining in internationally acclaimed restaurants.

Activities Engaged in by Wine & Culinary Enthusiasts

- Go to wineries for day visits (85%)
- Tour a region's wineries (74%)
- Dine at internationally acclaimed restaurants (70%)
- Stay at gourmet restaurant (12%)
- Stay at wine tasting school (5%)
- Stay at a cooking school (3%)

Other *defining* activities that involve overnight stays at cooking or wine tasting schools or at gourmet restaurants are less widespread within the Wine & Culinary Enthusiast segment, likely because of the relative scarcity of these types of tourism products and the relative costs involved in such intensive wine or culinary experiences.

Even though these Wine & Culinary Enthusiasts travelled to Canada during the past several years, it is not known whether their day visits to wineries, touring wine regions, eating in gourmet restaurants or any other activity took place on a *Canadian* trip. In fact, in light of the high propensity of members of this market segment to travel to Europe and other countries outside North America, it is quite likely that some of their wine/culinary experiences took place abroad.

2.4 Overlap With Other Activity-Based Segments

U.S.A. Wine & Culinary Enthusiasts with recent leisure travel experiences in Canada have relatively wide-ranging tourism interests. About half of this market segment are also Heritage Tourism Enthusiasts (3.1 million) and/or Visual Arts Enthusiasts (2.6 million), close to one-third fall into the Soft Outdoor Adventure Enthusiast market (1.9 million) and slightly fewer are Performing Arts Enthusiasts (1.7 million).

These overlaps suggest considerable opportunities for cross-market packaging and promotion of indoor and outdoor tourism products within the Wine & Culinary Enthusiast market that comes to Canada from the U.S.A.

2.5 Image Challenges & Media Sources

Even though they are Wine & Culinary Enthusiasts, these Americans proffer their highest ratings of Canada for attributes that are associated with the *outdoors*:

- A place with beautiful scenery;
- Clean and well cared for;
- A great place for fishing;
- A great place to relax and get away from it all;
- A place with lots of things for mature adults to see and do.

This market segment also considers Canada to be a place that has a lot for *families* to see and do, *respects the natural environment*, is *safe* for visitors, has *friendly people*, is one of the best destinations for *outdoor activities*, and has a lot for *young people* to see and do.

At the same time, some of the characteristics that might be of special importance in attracting more American Wine & Culinary Enthusiasts to Canada are ones that achieve only moderately favourable ratings: *shopping opportunities*, *value for money*, cultural and urban *attractions*, *romance* and a *bon vivant* lifestyle (the "good life"). American Wine & Culinary Enthusiasts are least positive about Canada as a place to visit in the *winter* and as a destination with a *popular or trendy* image.

Image building and product awareness messages to Wine & Culinary Enthusiasts are likely to achieve the highest reach in daily and weekend editions of local newspapers, including the travel sections of these editions and through the American Automobile Association (AAA). Membership lists from art galleries, museums, botanical gardens and zoos might also be useful tools for reaching Wine & Culinary Enthusiasts in the U.S.A. since they are members of these types of organizations at much higher rates than is the typical American adult.

2.6 Impacts of Population Changes

Several fundamental changes in the U.S.A. population structure might be taken into account in tourism planning and product development in Canada over the next two decades:

- As the primary market for inbound tourism from the United States, border and mid-tier state populations will grow at an appreciably *lower* rate than will the population of the U.S.A. as a whole, and particularly the southern tier of the U.S.A. At an estimated 18 per cent increase in the adult population of states that are on the Canada/ U.S.A. border by 2025 compared to a 27 per cent increase for the entire country, the pool of Americans from which Canada has to draw from for the all-important "border" market will increase at a lower rate than will more distant parts of the U.S.A. By 2025, the border state population is estimated to reach 42.3 million adults from its current level of 35.9 million.
- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the American population. They currently account for over one-quarter of the adult population (27%) but will represent over one-third by 2025 (37%).
- As the population ages, the proportion of American adults living in households with children will decline. At this time, 1-in-3 adults live in households with teenagers or children (34%), but this proportion will decline to less than 3-in-10 by 2025 (29%).

2.7 Implications for Wine & Culinary Tourism Enthusiasts

There will be an increase in the absolute number of Americans who will be in the market for wine and culinary experiences between 2000 and 2025, from an estimated 21.6 million now to about 28.2 million in 2025. Canada's likely share of this market – those who will seek wine and culinary experiences and take leisure trips to Canada – is also expected to grow substantively, from 5.5 million to 7.5 million.

These growth rates are *higher* than the population growth rate of the U.S.A. as a whole, primarily because wine and culinary tourism activities tend to appeal to older people. Just as the older end of the age spectrum will increase as a proportion of the total population over the next two decades, so too will the market for wine and culinary tourism . . . so long as changes are made in the amenities and services offered by tourism businesses who serve this market segment to accommodate the needs and interests of an aging population.

2.8 Summary

The Wine & Culinary Enthusiast market for Canada from the U.S.A. is older, more affluent and has more formal education than does the typical American tourist. It is over-represented in border states and under-developed in *long haul* markets.

Day tours of wineries, touring wine regions and eating in internationally acclaimed restaurants are widely sought activities within this market segment.

The in-bound American market has considerable growth potential over the next two decades, in large part because it appeals to older people – the segment that will experience the greatest "growth spurt" between now and 2025.

There is a relatively strong link between Wine & Culinary Enthusiasts and Heritage and Visual Arts enthusiasts that could be used for cross-marketing and packaging.

Image building for Canada's wine and culinary products over the next two decades will likely be required to increase the enthusiasm of potential American tourists for destinations in Canada vis à vis the U.S.A. and Europe.

3. U.S. Wine & Culinary Enthusiasts – 2000

3.1 Market Size & Overlap With Other Activity Groups

The CTC identified several market segments generated from variables within the Travel Activities and Motivation Survey (TAMS) for special analysis. These include Wine & Culinary Enthusiasts, Hard and Soft Outdoor Adventure Enthusiasts, Alpine Skiers, Other Winter Activity Participants (non-alpine), Heritage Enthusiasts, Visual Arts Enthusiasts, and Performing Arts Enthusiasts (see Appendix for definitions). The table below provides information on the total size of each of these market segments, the number who have travelled to a Canadian destination in the past couple of years and the degree of overlap within the Wine & Culinary Enthusiast segment.

Of the 200.4 million American adults in 2000, about 21.6 million are Wine & Culinary Enthusiasts (11%). Of these, about 1-in-4 claim to have visited Canada on a leisure trip in the past two years. Thus, the market for Canada's wine and culinary products is between five and six million American adults (5.5 million).

**Table 1: U.S.A. Wine & Culinary Enthusiasts –
Market Size & Comparisons With Other Segments**

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Wine & Culinary Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*5.5 million*
Wine/Culinary	**21.6**	**5.5**	**5.5**
Soft Outdoor Adventure	35.5	7.1	1.9
Heritage	34.5	8.3	3.1
Performing Arts	15.6	3.8	1.7
Visual Arts	27.6	7.0	2.6
Winter Outdoors (excluding alpine skiing)	15.0	3.7	1.2
Alpine Skiing	21.4	4.6	1.3
Hard Outdoor Adventure	15.7	3.2	1.0

Source: Special TAMS Tabulations, page 7-1. See Appendix for unweighted base sizes.

Of the activity-based market segments of special interest to the CTC, Wine & Culinary Enthusiasts represent a larger market than does Winter Outdoors (non-alpine) (15.0 million adults) , Hard Outdoor Adventure (15.7 million adults) and Performing Arts Enthusiasts (15.6 million adults), but a smaller market than Soft Outdoor Adventure (35.5 million), Heritage Enthusiasts (34.5 million), and Visual Arts Enthusiasts (27.6 million).

Within the sub-group of Americans who have recent travel experience in Canada, the 5.5 million Wine & Culinary Enthusiasts rank fourth among the groups examined in this analysis. As noted above, of the 21.6 million Wine & Culinary Enthusiasts in the U.S.A., Canada attracts about one-quarter for leisure trips over a two year period (26%). This is a higher "success rate" than is evident for Soft Outdoor Adventure Enthusiasts (20%), and about on par with the success rate achieved by various cultural enthusiast market segments.

Wine & Culinary Enthusiasts with recent Canadian leisure travel experiences have relatively wide-ranging tourism interests. These interests are concentrated in cultural and heritage activities and explains why over half of the Wine & Culinary Enthusiasts are also Heritage Enthusiasts (56%), close to this proportion are Visual Arts Enthusiasts (48%) and just over one-third of these Americans are also Soft Outdoors Adventure Enthusiasts (35%). These overlaps suggest packaging, product development and marketing opportunities: sub-groups within the Wine & Culinary Enthusiast segment might be attracted by *combinations* of products that meet their food and wine interests as well as their interests in museums, galleries, Aboriginal events, theatre, other live performances, and outdoor experiences.

About one-fifth of Wine & Culinary Enthusiasts ski or engage in other winter sports, making them a segment that might be amenable to winter travel to Canada.

3.2 Where They Live & Where They Travel

Since Canada attracts the majority of its U.S.A. market from border states, it is not too surprising that 30 per cent, or 1.7 million of Wine & Culinary Enthusiasts live in Tier I states – those immediately adjacent to the Canadian border. Only about one-fifth of all American adults live in these border states (18%) but the Wine & Culinary Enthusiast market is substantively over-represented in these *near* markets. At the same time, Canada is less successful in attracting wine or culinary aficionados who live considerable distances from the U.S./Canada border. Over half of the U.S. adult population lives in Tier III states (54%), but fewer than 2-in-5 Wine & Culinary Enthusiasts with recent Canadian travel experience live in these *long haul* states (38%).

Table 2: Geographic Distribution of U.S.A. Wine & Culinary Enthusiasts

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Wine & Culinary Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*5.5 million*
Tier I (Border States)	18%	33%	30%
Tier II	28%	32%	32%
Tier III	54%	35%	38%

Source: Special TAMS Tabulations, pages 1-5; 23-5. Percentages may not add to 100 per cent due to rounding.

Regions that have noticeably higher proportions of Wine & Culinary Enthusiasts with Canadian experience than would be expected in light of the U.S. population distribution as a whole include East North Central and Mid Atlantic. For more regional information, please refer to Summary Table A-2, appended). Conversely, regions that deliver lower proportions of Wine & Culinary Enthusiasts than their size would lead one to expect include West North Central and East and West South Central.

American Wine & Culinary Enthusiasts travel to Canada's regions in much the same way as do Americans with any recent Canadian experience. As such, they are most apt to have visited Ontario in the past couple of years (61%), followed by Quebec (33%) and British Columbia (29%). Smaller proportions visit Atlantic Canada (16%) and the Prairie provinces – Alberta (10%) and Manitoba/Saskatchewan (7%).

Compared to the "typical" destination pattern for Americans who come to Canada on leisure trips, Wine & Culinary Enthusiasts show a particularly strong affinity for Quebec and, to a lesser extent, Atlantic Canada. The typical pattern would have 1-in-4 Americans who come to Canada spending time in Quebec (25%) but one-third of Wine & Culinary Enthusiasts are drawn to destinations in this province (33%). About 1-in-8 Americans would go to a location in Atlantic Canada on a leisure trip in the past couple of years, but 1-in-6 Wine & Culinary Enthusiasts would be found in Atlantic Canada (16%). Of the four provinces in the region, three of them (Nova Scotia, Prince Edward Island, New Brunswick) are over-represented within this market segment vis à vis typical American visitors.

Table 3: U.S.A. Wine & Culinary Enthusiasts – Destinations Visited in Past 2 Years

	USA Adults	Recent Leisure Travellers to Canada	
	Total	Total	Wine & Culinary Enthusiasts
Adults 18+	*200.4 million*	*26.3 million*	*5.5 million*
Canadian destinations	13%	100%	100%
Atlantic Canada	2%	12%	16%
Quebec	3%	25%	33%
Ontario	7%	55%	61%
Manitoba/Saskatchewan	1%	7%	7%
Alberta	1%	10%	10%
British Columbia	4%	30%	29%
Territories	1%	4%	2%
Other Destinations			
Any U.S.A. Destination	69%	93%	96%
Mexico/Caribbean	15%	25%	31%
U.K./Other Europe	8%	18%	27%
Other Countries	7%	15%	21%
Any Non- U.S.A. (NET)	31%	100%	100%

Source: Special TAMS Tabulations, pages 2; 24. Percentages do not add to 100 per cent because of multiple destinations.

There is a robust competitive environment for Canada within the Wine & Culinary Enthusiast segment. These tourists display an almost universal tendency to take leisure trips *within* the United States (96%) and are also apt to have travelled to Mexico or the Caribbean (31%), Europe (27%) and other countries (21%) over a two year period. These rates of foreign travel, and particularly trips to destinations in Europe and other countries, are appreciably higher than those found within the American market for Canada as a whole.

3.3 Demographic Characteristics of Wine & Culinary Enthusiasts

Wine & Culinary Enthusiasts are slightly more likely to be men than women and span the adult age spectrum. One-fifth fall into the youngest age group (18 to 34) and one-quarter are in their "family" years (35 to 44). One-third are divided almost evenly between the near-retirement (55 to 64) and the retirement years (65+). Their average age is just over 48 years . . . slightly higher than the age of *all* American adults who come to Canada for leisure travel over a two year period (47 years).

Table 4: Demographics of U.S.A. Wine & Culinary Enthusiasts – Gender & Age

	Recent Leisure Travellers to Canada	
	Total	Wine & Culinary Enthusiasts
Adults 18+	*26.3 million*	*5.5 million*
Men	51%	52%
Women	49%	48%
18 - 34 years	24%	19%
35 - 44 years	20%	24%
45 - 54 years	20%	19%
55 - 64 years	14%	18%
65+ years	17%	15%
Average Age	47.3 years	48.2 years

Source: Special TAMS Tabulations, pages 3-1; 25-1.

Compared to the total market for Canadian leisure experiences over the past couple of years, Wine & Culinary Enthusiasts are somewhat under-represented at the youngest end of the age spectrum. This finding is consistent with a drinking age of twenty-one in the U.S.A. and the relative affluence required to pursue interests in fine wines and gourmet food.

Wine & Culinary Enthusiasts span the income and education spectrums, but are appreciably more affluent than the typical American visitor to Canada and have more formal education. About one-sixth of Wine & Culinary Enthusiasts fall into a relatively low income group (under $40,000 US), one-fifth claim to have household incomes in the $40,000 to $60,000 US range and over-one third between $60,000 to $100,000 US. Incomes in excess of $100,000 US are characteristic of close to 3-in-10 of these food and wine enthusiasts (29%).

Table 5: Demographics of U.S.A. Wine & Culinary Enthusiasts – Income & Education

	RECENT LEISURE TRAVELLERS TO CANADA	
	TOTAL	WINE & CULINARY ENTHUSIASTS
Adults 18+	*26.3 million*	*5.5 million*
Household Income		
Under $40,000	26%	16%
$40,000 - $59,999	24%	22%
$60,000 - $99,999	31%	34%
$100,000 or more	19%	29%
Average	$65,200 US	$76,600 US
Education		
Some Secondary or Less	6%	1%
Completed Secondary	19%	14%
Some Post Secondary	45%	47%
Graduated University	30%	37%

Source: Special TAMS Tabulations, pages 4, 5-2; 26, 27-2. Income is percentaged among those stating; reported in 1998 US dollars.

This income pattern suggests a market segment with fewer low income and more high income Americans than those who typically come to Canada. The differential between "typical" US tourists and Wine & Culinary Enthusiasts from the U.S.A. is most apparent when average annual household incomes are compared: the average household income for the typical American leisure visitor to Canada is $65,200 and the average for the sub-group with a particular interest in food and wine is $76,600.

Higher household incomes are consistent with higher levels of formal education: over one-third of Wine & Culinary Enthusiasts have at least one university degree (37%) and a further 47 per cent have had some other form of post-secondary education.

Most Wine & Culinary Enthusiasts live in adult-only households – those with no members under the age of eighteen. Only one-fifth are likely to be in the market for wine or culinary tourism experiences that take into account the interests and needs of teenagers or children (22%). Wine & Culinary Enthusiasts are also less likely to live in households with children under twelve years of age (16%) than is the typical leisure tourist to Canada from the U.S.A. (22%).

Table 6: Demographics of U.S.A. Wine & Culinary Enthusiasts – Household Composition

	Recent Leisure Travellers to Canada	
	Total	Wine & Culinary Enthusiasts
Adults 18+	*26.3 million*	*5.5 million*
Adult Only	71%	78%
Any Teens/Children	29%	22%
Any Children under 12	22%	16%

Source: Special TAMS Tabulations, pages 6-2; 28-2.

3.4 Travel Activities Among Wine & Culinary Enthusiasts

3.4.1 Wine & Culinary Activities

Of the activities used to define Wine & Culinary Enthusiasts, **day visits to wineries** has the largest following. Over 8-in-10 of these enthusiasts claim to have participated in this activity on a leisure trip in the past couple of years. Other popular defining activities include touring a region's wineries and dining in internationally acclaimed restaurants. It is important to note that even though these Wine & Culinary Enthusiasts travelled to Canada during the past several years, the survey findings do not provide an indication of whether their day visits to wineries, touring wine regions, eating in gourmet restaurants or any other activity discussed in this report took place on a *Canadian* trip. In fact, in light of the high propensity of members of this market segment to travel to Europe and other countries outside North America, it is quite likely that some of their wine/culinary experiences took place abroad.

Table 7: U.S.A. Wine & Culinary Enthusiasts – Activities Used To Define Market Segment

	Wine & Culinary Enthusiasts
Adults 18+	*5.5 million*
Go to wineries for day visits	85%
Tour a region's wineries	74%
Dine at internationally acclaimed restaurants	70%
Stay at gourmet restaurant with accommodation on the premises	12%
Stay at a wine tasting school with accommodation on the premises	5%
Stay at a cooking school with accommodation on the premises	3%

Source: Special TAMS Tabulations, page 9-5.

Other *defining* activities that involve overnight stays at cooking or wine tasting schools or at gourmet restaurants are less widespread within the Wine & Culinary Enthusiast segment, likely because of the relative scarcity of these types of tourism products and the relative costs involved in such intensive wine or culinary experiences.

3.4.2 Outdoor Activities

Pairing outdoor and wine or culinary experiences for American tourists, and particularly those outdoor experiences that focus on Canada's flora and fauna and on its golfing opportunities may be a viable packaging and marketing approach in light of Wine & Culinary Enthusiasts' interest in these types of activities while on trips. About half of this market segment view wildlife and/or observe wild flora while on their travels. Approximately one-third golf while on their holidays with most playing the occasional game rather than staying at a golf resort or taking a golfing tour to play on various courses.

Table 8: U.S.A. Wine & Culinary Enthusiasts – Other Outdoor Activities

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*5.5 million*
Wildlife viewing	52%
Wildflowers / flora viewing	46%
Golfing	35%
Fishing	32%
Hiking/backpacking in wilderness settings	31%
Cycling	30%
Kayaking or canoeing	28%
Whale watching	25%
Bird watching	23%
Downhill skiing	22%
Horseback riding	20%
White water rafting	16%
Sailing	15%
Cross-county skiing	13%
Scuba diving	12%
Hunting	10%
Snowmobiling	8%
Rock climbing	5%
Hot air ballooning	4%
Motorcycling	3%
Parachuting	3%
Dog sledding	2%
Ice climbing	2%
Snowboarding	2%
Wind surfing	2%
Bungee jumping	1%

Source: Special TAMS Tabulations, pages 8-1/3.

Fishing is also popular among wine and culinary tourists, with about one-third going fishing. The same proportion might be found hiking or backpacking in wilderness settings or cycling and slightly fewer have canoed or kayaked on recent trips.

Between one-quarter and one-fifth go whale watching, bird watching, alpine skiing and/or horseback riding. Niche activity markets that might attract the Wine & Culinary Enthusiast include white water rafting, sailing, cross-county skiing, scuba diving, hunting, snowmobiling, and at a much more limited level, rock climbing, hot air ballooning, motorcycling and parachuting.

This wide array of popular outdoor activities on recent trips when taken in conjunction with their interests in wine and food makes these American tourists excellent targets for many of Canada's regions and product offerings.

3.4.3 Heritage Activities

As noted earlier, there is considerable overlap between the 5.5 million Wine & Culinary Enthusiasts and the group of American travellers who are defined as Heritage Enthusiasts. The heritage experiences that might prove most attractive to Wine & Culinary Enthusiasts include general history museums, local festivals and fairs as well as farmers' fairs or markets. These heritage experiences have attracted over half of the Wine & Culinary Enthusiast segment while on a trip in the past couple of years.

Table 9: U.S.A. Wine & Culinary Enthusiasts – Heritage Activities

	Wine & Culinary Enthusiasts
Adults 18+	*5.5 million*
General history museums	61%
Local festivals or fairs	53%
Farmers' fairs or markets	51%
Science & tech museums	48%
Historic sites	47%
Historical replicas of cities/towns	39%
Pow Wow/other Aboriginal celebrations/attractions	29%
French Canadian cultural experiences	23%
Pick your own farms / harvesting	20%
Children's museums	19%
Western theme events	16%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	14%

Source: Special TAMS Tabulations, page s 9-1/4

Other heritage attractions widely sought by Wine & Culinary Enthusiasts while on their travels include science and technology museums and historic sites. There is also comparatively robust interest in historic replicas of towns such as Williamsburg and in Aboriginal celebrations, attractions and events.

The comparatively strong interest in French Canadian cultural experiences is consistent with Wine & Culinary Enthusiasts' propensity to travel to destinations within Quebec (see 2.1). While similar to interest levels for French Canadian culture shown by members of *cultural* market segments covered in this series of reports, Wine & Culinary Enthusiasts tourists express appreciably higher interest (23%) than is evident among outdoor-oriented travel segments (e.g., Soft Outdoor Adventure Enthusiasts, 13%).

3.4.4 Performing & Visual Arts Activities

Wine & Culinary Enthusiasts are apt to go to live theatre performances when they travel (59%), suggesting opportunities to package wine tasting, gourmet dining and theatre performances as getaway packages for this market segment. Alternatives to live theatre might include classical or jazz concerts, ballet or opera.

Table 10: U.S.A. Wine & Culinary Enthusiasts – Performing & Visual Arts Activities

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*5.5 million*
Performing Arts	
Theatre	59%
Classical music concerts	28%
Jazz music concerts	24%
Music festivals	22%
Ballet or other dance	21%
Opera	20%
Theatre festivals	19%
Musical attractions such as Jazzland	14%
Literary festivals	11%
Visual Arts	
Local arts & crafts studios	76%
Art galleries	61%
International film festivals	5%

Source: Special TAMS Tabulations, pages 9-1/5.

Shopping or browsing in local arts and crafts studios (76%) and, to a lesser extent, going to art galleries (61%) are also widely sought by Wine & Culinary Enthusiasts while on their trips. These activities characterize the Visual Arts Enthusiast segment – a segment with a 48 per cent level of overlap with Wine & Culinary Enthusiasts.

3.4.5 Other Attraction-Based Activities

American travellers, regardless of which segment they fall into, seem especially fond of going to zoos and aquariums on their travels. Thus, it is not surprising that over half of those who have visited Canada in the past couple of years and are Wine & Culinary Enthusiasts claim to have gone to these attractions while on trips in the recent past.

Table 11: U.S.A. Wine & Culinary Enthusiasts – Other Activities

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*5.5 million*
Zoos	58%
Aquariums	56%
Botanical gardens	48%
Casinos	47%
Planetariums	27%
Horse races	23%
Auto races	15%

Source: Special TAMS Tabulations, pages 9-3/5.

Botanical gardens and casinos are also relatively common travel experiences among Wine & Culinary Enthusiasts, with just under half claiming to have been to these types of attractions on trips over the past two years or so. Planetariums and horse racing form part of the trip experiences for about 1-in-4 of these travellers.

3.5 Ratings of Canada

Wine & Culinary Enthusiasts were asked to rate Canada on a variety of dimensions using a ten point bi-polar scale ranging from *agree completely* (10) to *disagree completely* (1). Average ratings are shown in the accompanying table and are based on those who volunteered a score for a particular dimension. The table also displays the proportion of Americans in the Wine & Culinary Enthusiast segment who refrain from offering an opinion.

In this context, Canada is most highly rated by Wine & Culinary Enthusiasts for being *beautiful*, *clean* and a *relaxing place* with activities that would *appeal to mature adults*:

- A place with beautiful scenery
- A place that is very clean and well cared for
- A great place to go for fishing
- A great place to relax and get away from it all
- A place with lots of things for mature adults to see and do.

This market segment also considers Canada to be a place that has a lot for *families* to see and do, *respects the natural environment*, is *safe* for visitors, has *friendly people*, is one of the best destinations for *outdoor activities*, and has a lot for *young people* to see and do.

At the same time, some of the characteristics that might be of special importance in attracting more American Wine & Culinary Enthusiasts to Canada are ones that achieve only moderately favourable ratings: *shopping opportunities*, *value for money*, cultural and urban *attractions*, *romance* and a *bon vivant* lifestyle (the "good life"). American Wine & Culinary Enthusiasts are least positive about Canada as a place to visit in the *winter* and as a destination with a *popular or trendy* image.

Table 12: U.S.A. Wine & Culinary Enthusiasts – Attitudes Toward Canada

	Recent Leisure Travellers to Canada		
	Total	Wine & Culinary Enthusiasts	
Adults 18+	*26.3 million*	*5.5 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.2	9.3	2%
Clean/well cared for	8.7	8.8	2%
Great place for fishing	8.7	8.7	37%
Great place to relax	8.6	8.7	5%
Lots for mature adults	8.6	8.6	10%
Lots for families	8.5	8.4	14%
Respects natural environment	8.5	8.4	8%
Safe for visitors	8.3	8.4	8%
Place with friendly people	8.4	8.4	3%
Great place for hunting	8.4	8.4	49%
One of best destinations for outdoor activities	8.2	8.2	13%
Lots for young adults	8.1	8.1	23%
Great place to experience adventure & excitement	8.0	8.0	13%
Place with interesting shops	8.0	8.0	10%
Offers excellent value for money	7.9	8.0	7%
One of best summer destinations	8.1	7.9	9%
Many cultural events & attractions	7.8	7.9	8%
Great place to experience city life	7.7	7.8	9%
Great place to see historic sites	7.5	7.6	8%
Great place to experience different cultures and ways of life	7.6	7.5	11%
Great place for Aboriginal culture	7.4	7.4	28%
Place for romance	7.2	7.3	17%
Great place to experience "good life"	7.1	7.2	16%
Popular, trendy place	6.6	6.5	17%
One of best winter destinations	6.3	6.4	21%

Source: Special TAMS Tabulations, page 13. Average ratings are based on those rating Canada on a ten point bi-polar scale ranging from 10 "agree completely" to 1 "disagree completely".

3.6 Ways to Reach Wine & Culinary Enthusiasts

There are several measures within TAMS that may help marketers reach Wine & Culinary Enthusiasts with their messages:

- Print media read on a regular basis;
- Television programs viewed regularly; and
- Club and association memberships.

Almost all Americans in the Wine & Culinary Enthusiast segment claim to read or look into their local newspapers on a regular basis, including the weekday (81%) and weekend editions (88%). Furthermore, three-quarters read the *travel section* of weekend editions on a regular basis and almost two-thirds claim to read or look through the travel section of weekday editions.

Table 13: U.S.A. Wine & Culinary Enthusiasts – Print Media Read Regularly

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*5.5 million*
Daily Newspaper (Any)	**91%**
Weekday edition	81%
Travel section of weekday edition	62%
Weekend edition	88%
Travel section of weekend edition	74%
Community newspapers	79%
Any Magazines	**96%**
Travel magazines	56%
Hobby magazines	51%
News magazines	48%
National Geographic	38%
Sports magazines	34%
Fashion/homemaking magazines	32%
General interest/city life magazines	24%

Source: Special TAMS Tabulations, page 14.

These tourists are also avid magazine readers (96%). Close to 6-in-10 read travel magazines on a regular basis and almost 4-in-10 say that they read National Geographic regularly. About one-half read hobby and/or news magazines regularly. General interest and city life magazines are popular among about 1-in-4 Wine & Culinary Enthusiasts.

Daily and weekend newspapers may have better reach among Wine & Culinary Enthusiasts than does any particular type of television programming. About 7-in-10 of these tourists say they watch televised movies on a regular basis and 6-in-10 claim to watch nature shows regularly. Professional sports broadcasts are also particularly popular within this market segment (62%), followed by early evening news broadcasts (59%), evening dramas (55%), sitcoms (51%) and late evening news (51%).

Table 14: U.S.A. Wine & Culinary Enthusiasts – Television Programs Viewed Regularly

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*5.5 million*
Movies	71%
Nature shows	62%
Professional sports	62%
Early evening news	59%
Evening drama	55%
Evening sitcoms	51%
Late evening news	51%
Morning news	47%
Instructional/hobby shows	43%
Daytime programs on weekdays	17%

Source: Special TAMS Tabulations, page 16.

In light of the fact that about one-third of Wine & Culinary Enthusiasts live in border states and would likely drive to Canada, the high level of auto club membership (e.g., AAA) among them makes this type of organization an opportune way to reach these enthusiasts (60%).

Overlap with the heritage and visual arts segments is manifest in the comparatively robust level of membership in art galleries and museums among Wine & Culinary Enthusiasts (27%). Membership lists from these types of attractions in the U.S.A. may be ways to reach Wine & Culinary Enthusiasts in the market for tourism experiences that blend wine and culinary experiences with theatre or music performances, visits to museums and art galleries.

Table 15: U.S.A. Wine & Culinary Enthusiasts – Club/Organization Memberships

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*5.5 million*
Auto club	60%
Sports club	33%
Nature organization	17%
Art gallery/museum	27%
Zoo/botanical garden	17%
Gardening club	4%

Source: Special TAMS Tabulations, page 17.

4. Projections to 2025

4.1 Introduction

In 2000, there were approximately 200.4 million Americans 18 years of age or older. The U.S. Census Bureau projects that this number will increase to 254.3 million by the year 2025, for an increase of 27 per cent. When this population increase is applied to the TAMS data, estimates of market size and characteristics in 2025 can be estimated, assuming that people in various age, gender and regional groups behave in 2025 as they did in 2000.

Because the population will not grow at the same rate among all age groups or in all regions of the United States, Canada should anticipate and prepare for changes in travel activities and interests in its U.S.A. market over the next two decades. In this chapter, some important structural shifts are described for the U.S.A. as a whole. Subsequently, expected change in the Wine & Culinary Enthusiast market is discussed.

4.2 An Aid to the Reader

The accompanying table and text are provided to aid the reader in interpreting the columns shown in the summary tables included in this section.

Sample Table

U.S.A. Adult Population – Gender & Age

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Men	48%	48%	27%	2%
Women	52%	52%	26%	-2%
18 - 34 years	30%	27%	14%	-50%
35 - 44 years	21%	17%	-1%	-103%
45 - 54 years	17%	16%	17%	-35%
55 - 64 years	11%	13%	47%	76%
65+ years	16%	24%	84%	211%

Source: Special TAMS U.S.A. Tabulations, Table 1.

Percentage of Adult Population In . . . 2000 Proportion of American adults in 2000 who fit the demographic characteristic (e.g., age, gender, place of birth) or participate in a particular activity (e.g., travel to a particular destination; golf, ski , camp or go to a museum while on trips) now. **Example:** 18 – 34 year olds represent 30 per cent of all adults living in the U.S.A., or 60.7 million of the 200.4 million American adults (2000).

Percentage of Adult Population In . . . 2025 Proportion of American adults in 2025 who are projected to fit the demographic characteristic (e.g., age, gender, place of birth) or participate in a particular activity (e.g., travel to a particular destination; golf, ski, camp or go to a museum while on trips). **Example:** 18 – 34 year olds are expected to represent 27 per cent of all adults living in the U.S.A., or 68.9 million of the 254.3 million American adults (2025).

Growth Rate from 2000 to 2025 Anticipated rate of change in the number of American adults who will fit the demographic or behavioural characteristic by 2025. **Example:** the 68.9 million 18 – 34 year olds in 2025 is 14 per cent higher than the 60.7 million 18 – 34 year olds in 2000.

Impact of 2025 Population Structure on Growth Rate How much the structure of the population projected for 2025 will influence the growth rate of a demographic or behavioural characteristic. Negative numbers suggest a downward pressure on growth rates and positive numbers represent an upward pressure. **Example:** the growth rate for 18 – 34 year olds (14%) will be 50 per cent lower than it would have been if the structure of the population had remained as it is was in 2000. Thus, if the population structure of 2000 were sustained to 2025, there would have been 77.0 million young adults in the U.S.A., or 27 per cent more than there were in 2000 but changes in the population structure bring this number down to 68.9 million or 14 per cent more than there were in 2000, for a difference in the growth rate [14%/27%] of –50 per cent.

4.3 Regional Changes in the USA Market

The adult population in different parts of the country will change at different rates, with those that border Canada experiencing the *lowest* growth rate (18%) and those furthest from the border experiencing the highest growth rate (37%).

While states that are immediately adjacent to Canada's border will increase in population over the next two decades, they will do so at a rate of growth that is one-third lower than would have occurred if the population structure of 2000 were to remain intact through 2025. The middle tier states, including some of Canada's major markets such as Pennsylvania, Illinois, Ohio, Massachusetts and the Washington D.C. area will also represent a smaller share of the total USA market than they do now, with a decline in the anticipated growth rate of more than half. In contrast, southern states – those that are more challenging markets for Canada – will increase as a proportion of the total USA adult population, and will grow at a 38 per cent higher rate than would have been anticipated given the current population structure (see Appendix for the states included in each of the three tiers).

Table 16: Shifts in USA Adult Population

	U.S.A. Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Numbers in millions	2000	2025		
Total USA	**200.4**	**254.3**	**27%**	
Tier I (Canada's Border)	35.9	42.3	18%	-34%
Tier II	56.6	64.0	13%	-51%
Tier III	108.0	148.0	37%	38%

Source: Special TAMS U.S.A. Tabulations, Table 5. See Appendix for definition of Tiers.

Mountain and Pacific region states will experience the most dramatic growth over the next two decades. The Mountain region will grow from about 12.1 million adults to 17.4 million by 2025 while the three Pacific states – California, Oregon and Washington – will increase from about 30 million now to over 44 million in two decades. Almost 35 million of these American adults will live in California (see summary table A-3, appended for population estimates for each U.S. Census region).

4.4 Demographic Changes in the USA Market

Changes to the demographic profile of Americans over time are apt to have an especially dramatic impact on Canada's tourism volume and value, and the types of activities our American neighbours will seek on their travels.

4.4.1 Gender & Age

There will be a noticeable decline in the proportion of the population that is young or middle-aged, and a substantive increase in the proportion that is older.

- The 18 to 34 year old age group will decline slightly to just over 1-in-4 adult Americans by 2025;
- Americans in their "family" years (35 – 44) will fall from just over 1-in-5 members of the adult population to about 1-in-6;
- Middle-aged Americans (45 – 54) will hold steady as a proportion of the total population, from 17 per cent to 16 per cent in 2025;
- Starting at about age 55, the pattern shifts with older people representing *higher* proportions of the adult population in the U.S.A. in 2025 than they do now. The increase is most prominent among Americans 65 years of age or older. This cohort currently represents about one-sixth of the adult population but by 2025 it is expected to represent one-quarter.

In absolute numbers, the young adult population (18 – 34 years) will shift from about 60.7 million to 68.9 million between 2000 and 2025. This young cohort is growing at a rate that is 50 per cent lower than would have been expected if the structure of the population had remained constant between 2000 and 2025. Thus, the impact of changes in the population mix in the U.S.A. will reduce the growth rate of the younger age segment substantively. A similar finding is evident for other younger and middle-aged cohorts.

In the case of the "family market", not only is the growth rate much lower than would be expected based on today's population structure, but there will be a marginal decrease in the absolute numbers of Americans in the 35 to 44 year age bracket – from 42.4 million in 2000 to 42.0 million in 2025.

As noted above, the trend reverses in the older age groups. In fact, the oldest segment of the population – adults who are at least 65 years of age will represent close to twice as many Americans by 2025 as they do now, or 59.8 million instead of the current 32.5 million.

Table 17: U.S.A. Adult Population – Gender & Age

	% of Adult Population In . . . 2000	2025	Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Adults 18+	*200.4 million*	*254.3 million*		
Men	48%	48%	27%	2%
Women	52%	52%	26%	-2%
18 - 34 years	30%	27%	14%	-50%
35 - 44 years	21%	17%	-1%	-103%
45 - 54 years	17%	16%	17%	-35%
55 - 64 years	11%	13%	47%	76%
65+ years	16%	24%	84%	211%

Source: Special TAMS U.S.A. Tabulations, Table 1.

4.4.2 Household Income & Education

The proportion of American adults with household incomes in various groups from *low* to *high income* are not expected to change substantively between now and 2025. A modest increase in the proportion of Americans who have at least some post-secondary education is anticipated over the next two decades. This change in the educational composition of the U.S.A. market may have an impact on tourism choices in the future.

Table 18: U.S.A. Adult Population – Household Income & Education

	% of Adult Population In . . . 2000	2025	Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Adults 18+	*200.4 million*	*254.3 million*		
Household Income				
Low Income	45%	45%	26%	-4%
Low - Middle	23%	23%	26%	-2%
Middle – High	21%	21%	24%	-9%
High Income	11%	11%	25%	-7%
Education				
Some Secondary or Less	13%	11%	9%	-65%
Completed Secondary	26%	26%	24%	-10%
Some Post Secondary	40%	41%	29%	10%
Graduated University	20%	22%	36%	35%

Source: Special TAMS U.S.A. Tabulations, Table 3. Repercentaged on total stating income. Incomes are expressed in 1998 US dollars.

4.4.3 Household Composition

The 2025 age mix of Americans will have a substantive impact on the types of activities they are interested in pursuing on their travels because as they age, they will become more concentrated in adult-only households. The family market – households in which there are children twelve years of age or younger – will decline from over 1-in-4 (27%) to less than 1-in-4 (23%). Conversely, those who live in adult-only households (no children or teenagers) will increase from 59 per cent to 64 per cent.

Table 19: U.S.A. Adult Population – Household Composition

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Adult Only	59%	64%	37%	40%
Any Teens/Children	34%	29%	9%	-68%
Any Children under 12	27%	23%	8%	-70%

Source: Special TAMS U.S.A. Tabulations, Table 4.

4.5 Destination Choices

With the exception of a slight increase in the proportion of Americans who will likely travel abroad, outbound destination choices in 2025 are likely to look much as they do now, with about 1-in-7 taking leisure trips over a two year period to a Canadian destination and about the same proportion travelling to Mexico or the Caribbean. Travel by Americans to Europe will remain at just under ten percent, but the growth rate for Europe-bound travel (39%) is noticeably higher than would have been expected based on the current population structure.

Table 20: U.S.A. Adult Population – Destinations Visited on Leisure Trips in Past Couple of Years

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
	2000	2025		
Adults 18+	*200.4 million*	*254.3 million*		
Canada	13%	14%	31%	14%
Mexico/Caribbean	15%	15%	28%	5%
U.K./Europe	8%	9%	39%	46%

Source: Special TAMS U.S.A. Tabulations, Tables 24 - 31.

It is important to note that this predicted growth rate for Americans travelling to Europe (39%) is higher than the expected rate of increase in Americans travelling to Canada (31%), suggesting greater competition for Canada within the outbound U.S.A. market in the years to come.

4.6 Wine & Culinary Enthusiasts

As noted in the demographic profile section of this report, the Wine & Culinary Enthusiast market segment tends to attract comparatively mature travellers and, correspondingly, those with no children living in the household. Older Americans, and particularly those between 55 and 64 years of age, are especially characteristic of this segment.

Because the U.S.A. population will shift over the next two decades to an older and childless one, the very characteristics that define Wine & Culinary Enthusiasts help explain why growth in this market is predicted to be 12 per cent **higher** than would have been expected given today's population structure. The total Wine & Culinary Enthusiast market in the U.S.A. is predicted to grow from 21.6 million in 2000 to 28.2 million by 2025.

A similar pattern is evident for changes in the Wine & Culinary Enthusiast segment that takes leisure trips to Canada. This population is expected to increase from 5.5 million now to 7.5 million in 2025. This growth rate, at 35 per cent, is about 31 per cent **higher** than would have been expected given today's population structure.

For purposes of contrast, the table also displays predicted growth rates for other key CTC activity-based market segments. Clearly, Heritage Enthusiasts will grow at much higher rates than will Wine & Culinary Enthusiasts, largely because the heritage segment attracts an even higher proportion of older travellers now than does the wine and culinary segment. In contrast, segments such as Soft Outdoor Adventure Enthusiasts, Alpine Skiers and Other Winter Outdoors Participants – segments that rely on a younger and more energetic consumer – are expected to grow at lower rates over the next two decades than would have been anticipated given today's population structure.

Table 21: U.S.A. Adult Population – High Intensity Activity Groups

	% of Adult Population In . . .		Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Numbers in millions	2000	2025		
Total U.S.A. Adult Population	200.4	254.3	27%	
Total Wine/Culinary Enthusiasts	21.6	28.2	30%	12%
Wine/Culinary Enthusiasts Who Take Leisure Trips to Canada	**5.5**	**7.5**	**35%**	**31%**
Other CTC Activity Groups - Leisure Trips in Canada				
Soft Outdoor Adventure Enthusiasts	7.1	8.8	25%	-7%
Alpine Skiing	4.6	5.7	25%	-8%
Heritage Enthusiasts	8.3	12.3	47%	76%
Performing Arts Enthusiasts	3.8	5.1	35%	30%
Visual Arts Enthusiasts	7.0	9.2	31%	16%
Winter Outdoor Participants	3.7	4.7	26%	-2%

Source: Special TAMS U.S.A. Special Calculations

5. Appendix

5.1 TAMS Definitions

The Travel Activities and Motivation Survey (TAMS) An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of leisure travel among Canadians and Americans. This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behaviour and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada.

TAMS consisted of both a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents 18 years of age or over were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Usable questionnaires were received from 5,490 Canadians and 6,405 (26.0%) U.S. respondents.

Projections to the TAMS Data Base The Canadian population 18 years of age or older was projected to the year 2026 and the corresponding USA population was aged to the year 2025. A special additional adjustment was made in the re-weighting of TAMS data to take into account an anticipated increase in the rate of educational achievement within the populations of both countries. In particular, it was assumed that the incidence of the highest level of education achieved in the period 1975 to 1999 represents a long term equilibrium of educational achievement. Figures for each sampling unit used in TAMS were supplied for aging the Canadian population and the USA by Ontario's Ministry of Tourism and Recreation (MTR). These projections included MTR's adjustments for increased educational achievement and immigration flows for Canada.

Activity Segments of Interest to the Canadian Tourism Commission

Following are the TAMS variables that were combined to create activity-based sub-markets of special interest to the Canadian Tourism Commission.

High Intensity Soft Outdoors - Minimum of two of the following from the TAMS "activities on trips in past two years" list and not already categorized as "High Intensity Hard Outdoor Adventure": recreational biking, biking as an overnight touring trip, any motorcycling, kayaking or canoeing, motor boating, sailing, wind surfing, hiking/backpacking, horseback riding, hot air ballooning, cross-county skiing, downhill skiing, snowboarding, any snowmobiling. May include consumptive outdoor activities (hunting/fishing).

High Intensity Hard Outdoors - Took trip to experience adventure and excitement in past two years and minimum of two of the following activities if one activity is white water rafting; if no white water rafting, any one of: ice or rock climbing, mountain biking; dog sledding; hang-gliding; bungee jumping; heli-skiing; scuba diving. May include consumptive outdoor activities (hunting/fishing).

High Intensity Wine/Culinary - Any of: Stay at cooking school, wine tasting school or gourmet restaurant with accommodation on the premises; or minimum of 2 of the following: touring a region's wineries; going to wineries for day visits; dining at internationally acclaimed restaurants.

High Intensity Performing Arts - At least one of experiences: different cultures/ways of life; experience city life; at least three of music festivals; literary festivals or events; theatre festivals; opera; ballet or other dance; theatre; classical music concerts; jazz music concerts; musical attractions such as Jazzland.

High Intensity Visual Arts - At least one of experiences: different cultures/ways of life; experience city life; at least two of art galleries; international film festivals; shop or browse – local arts & crafts studios.

High Intensity Heritage - At least one of experiences: different cultures/ways of life; visit historical sites/important places in history; participate in hands-on learning experience; at least four of Aboriginal cultural experiences in remote/rural setting; Pow Wow/other Aboriginal celebration; Aboriginal attractions; French Canadian cultural experiences; carnivals such as Caribana; western theme events; farmers' fairs or markets; local festivals or fairs; children's museums; general history museums; science or technology museums; historical replicas of cities/towns; historic sites; pick your own farms / harvesting.

Any Alpine - alpine skiers (alpine, heli skiing, snowboarding) and/or ski package.

Any Other Winter - Any of: ice climbing, dog sledding, ice fishing, snowmobiling, cross country skiing (any or as a touring trip) [excludes alpine skiers and snowboarders].

5.2 Unweighted Base Sizes

Table A-1: Activity-Based Market Segments: Unweighted Base Sizes From the U.S. TAMS Mailback Questionnaire

	Unweighted Records – Mailback
Adult Leisure Travellers to Canada in the Past 2 Years	1,509
Soft Outdoor Adventure Enthusiasts	419
Wine/Culinary Enthusiasts	**341**
Heritage Enthusiasts	498
Performing Arts Enthusiasts	244
Visual Arts Enthusiasts	429
Winter Outdoors (excluding alpine skiing)	227
Alpine Skiing	254

Source: Special TAMS U.S.A. Tabulations, page 1.
Note: Segments are based on past two year leisure travel to a Canadian destination and participation in a pre-defined set of activities while on trips taken to any destination in the past two years.

5.3 Additional Summary Tables

Table A-2: U.S.A. Wine & Culinary Enthusiasts – Census Regions

	USA Adults	Recent Travellers to Canada	
	Total 200.4 million	Total 26.3 million	Wine & Culinary Enthusiasts 5.5 million
New England	5%	8%	5%
Mid Atlantic	14%	19%	22%
South Atlantic	18%	12%	18%
East North Central	16%	23%	22%
West North Central	7%	5%	4%
East South Central	6%	3%	2%
West South Central	11%	5%	4%
Mountain	6%	6%	6%
Pacific	15%	18%	17%

Source: Special TAMS Tabulations, pages 1; 23. Percentages may not add to 100 per cent due to rounding.

Table A-3: Shifts in USA Adult Population – U.S. Census Regions

Numbers in millions	U.S.A. Adult Population In . . . 2000	2025	Growth Rate from 2000 to 2025	Impact of 2025 Population Structure on Growth Rate
Total USA	**200.4**	**254.3**	**27%**	
New England	10.2	11.9	16%	-39%
Mid Atlantic	28.9	32.2	11%	-59%
South Atlantic	36.9	49.4	34%	26%
East North Central	32.9	36.4	10%	-61%
West North Central	13.9	16.5	19%	-30%
East South Central	12.1	15.2	25%	-5%
West South Central	21.6	29.2	35%	31%
Mountain	12.1	17.4	43%	60%
Pacific	30.4	44.3	46%	69%

Source: Special TAMS U.S.A. Tabulations, Table 5.

5.4 Definition of USA Tiers

In TAMS analysis, the following states were assigned to three tiers, based on their distance from the USA/Canada border.

Tier I (Canada's Border States): Washington, Montana, North Dakota, Minnesota, Wisconsin, Michigan, New York, Vermont, New Hampshire, Maine, Alaska.

Tier II: Oregon, Idaho, Wyoming, South Dakota, Nebraska, Iowa, Illinois, Indiana, Ohio, Pennsylvania, Massachusetts, Connecticut, Washington D.C., Virginia, Maryland.

Tier III: Nevada, Utah, Colorado, Kansas, Missouri, Kentucky, Tennessee, West Virginia, Delaware, New Jersey, Rhode Island, California, Arizona, New Mexico, Texas, Oklahoma, Arkansas, Louisiana, Mississippi, Alabama, Georgia, North Carolina, South Carolina, Florida, Hawaii.

5.5 Activities Measured in TAMS

Codes For NET Activities: TAMS

Bird watching
Whale watching
Other wildlife viewing
Wildflowers / flora viewing
Recreational biking
Mountain biking
Biking – as an overnight touring trip
Motorcycling – day excursions on an overnight touring trip
Motorcycling – as an overnight touring trip
Kayaking or canoeing
Motor boating
Sailing
Wind surfing
White water rafting
Ice climbing
Rock climbing
Dog sledding
Seeing northern lights or other arctic experiences
Fishing – fresh water
Fishing – salt water
Ice fishing
Working out in a fitness centre
Jogging outdoors
Going on picnics in park settings
Golfing – play an occasional game while on a trip
Golfing – stay at a golf resort for one or more nights
Golfing – take a packaged golf tour to play on various courses
Hang-gliding
Hiking or back-packing in wilderness settings
Horseback riding
Hot air ballooning
Hunting – big game
Hunting – birds or small game
Parachuting
Bungee jumping
Playing baseball or softball
Playing basketball
Going bowling
Playing chess or backgammon
Curling
Playing football
Playing ice hockey
Playing squash
Playing soccer
Playing tennis
Playing volleyball
Ice skating
In-line / roller skating
Professional football games (as a spectator)
Professional golf tournaments (as a spectator)
Professional ice hockey games (as a spectator)
Horse races
National or international sporting events such as the Olympic

Skiing – cross country
Skiing – cross country as an overnight touring trip
Skiing – downhill
Heli-skiing
Snowboarding
Snowmobiling – day use on organized trail
Snowmobiling – as an overnight touring trip
Sunbathing or sitting on a beach
Scuba diving
Swimming in lakes
Swimming in oceans
Aboriginal (e.g., Native American) cultural experiences in a remote or rural setting where you stayed for one or more nights
Pow Wows or other aboriginal (e.g., Native American) celebrations, such as the Wikwemikong Pow-Wow
Aboriginal (e.g., Native American) attractions such as the Indian Museum of North America in Arizona or the Polynesian Cultural Centre in Hawaii
French Canadian cultural experiences
Musical festivals such as the jazz festival in Montréal or the Chicago Blues Festival
International film festivals such as the Cannes Film Festival
Literary festivals or events
Theatre festivals
Carnivals such as Mardi Gras or Rio’s Carnival
Western theme events, such as rodeos or the Calgary Stampede
Farmers' fairs or markets
Local festivals or fairs such as fall fairs, winter carnivals, Highland Games, Octoberfests, folklore festivals
Art galleries
Children's museums
General history or heritage museums
Science or technology museums such as the Smithsonian National Air and Space Museum
Opera
Ballet or other dance performances
Theatre
Concerts – classical
Concerts – jazz
Concerts – rock & roll / popular
Musical attractions such as the Rock 'n Roll Museum or Jazzland
Historical replicas of cities or towns with historic re-enactments such as Williamsburg
Historic sites such as Statue of Liberty, Acropolis or Fort Alamo
Movie theme parks like MGM studios
Science & technology theme parks like Epcot
Amusement parks like Disneyland
Garden attractions such as Cypress Gardens or Tivoli Park
Botanical gardens
Planetariums
Zoos
Aquariums
Natural wonders such as Niagara Falls or the Grand Canyon
Auto races (as a spectator)
Professional baseball games (as a spectator)
Professional basketball games (as a spectator)
Professional figure skating (as a spectator)
Scenic day or evening tours by boat
Scenic day tours by train
Going to wineries for day visits and tastings
BUSINESS ACTIVITIES
(WHILE ON A TRIP OF ONE OR MORE NIGHTS)
Attend business meetings out of town

Games (as a spectator)
Amateur sports / arts / hobby tournaments and competitions (as a spectator or participant)
Recreational dancing
Casinos
Local outdoor cafes
Movies
Restaurant dining – regional or local cooking
Restaurant dining – internationally acclaimed restaurants
Shop or browse – bookstores or music stores
Shop or browse – antiques
Shop or browse – gourmet foods in retail stores or farms
Shop or browse – local arts & crafts studios or exhibitions
Shop or browse – clothing, shoes and jewellery
Pick-your-own farms or participating in harvesting
Read for relaxation or personal interest (while on trip)
Camping – in large public campgrounds in national, state or provincial parks
Camping – in campgrounds outside national, state or provincial parks
Camping – in wilderness settings
Staying at a lakeside resort in summer
Staying at a lakeside resort in winter
Staying at a ski resort or mountain resort in summer
Staying at a ski resort or mountain resort in winter

Staying at a seaside resort in summer
Staying at a seaside resort in winter
Staying at a remote or fly-in lodge
Staying at a remote or fly-in outpost

Staying at a wilderness lodge you can drive to by car
Staying at a private cottage or condo you own
Staying at a private cottage or condo you rent
Staying at a cooking school with accommodation on the premises
Staying at a wine tasting school with accommodation on the premises
Staying at a gourmet restaurant with accommodation on the premises
Staying at a health spa
Staying at a working farm or guest ranch
Staying at a bed & breakfast
TOURING AND CRUISING (OVERNIGHT)
Guided scenic tours in the countryside, like fall colour tours where you stay one or more nights
Wandering around small towns and villages where you stay one or more nights
Touring a region's wineries where you stay one or more nights
Great Lakes cruises where you stay on board one or more nights
Submarine "cruises" where you stay on board one or more nights
Ocean cruises where you stay on board one or more nights
DAY TOURING
(WHILE ON A TRIP OF ONE OR MORE NIGHTS)
Coastal or lakeshore scenic drives in your own / rental vehicle
Guided bus day tours in a city
Scenic day tours in the countryside by bus
Scenic day tours by air

Attend trade shows out of town

Attend business conventions out of town
Attend conferences or seminars out of town
Attend company paid training out of town
Take a vacation paid for by your company (Incentive Travel)

Q.3 Getaways/Q. 8 Vacations
Took at least 1 trip in the **winter**
Took at least 1 trip in the **spring**
Took at least 1 trip in the **summer**
Took at least 1 trip in the **fall**

Q. 6 Getaways/Q.11 Vacations Use in Past 2 Years
Homes of friends & relatives
Hotels / Resorts / Country Inns

Motels

Bed & Breakfasts
Cottage, rented
Cottage, your own
Fishing or Hunting Lodges
Campgrounds / RV Parks – Fully serviced (water, sewer, electricity)
Campgrounds / RV Parks – Electricity only
Unserviced campgrounds or backcountry
Other
IF CAMPING:
What type of camping equipment did you use ***most often***?
Tent
Tent Trailer
Truck camper or van
Travel Trailer / Fifth wheel
Motorhome

Q. 15 – Package Used in past two years

Motorcoach touring package
A resort or cruise package
A theatre package
An adventure package
A ski package

A city package

An educational package
Some other type of package
Travel to Ontario
Ever
Never