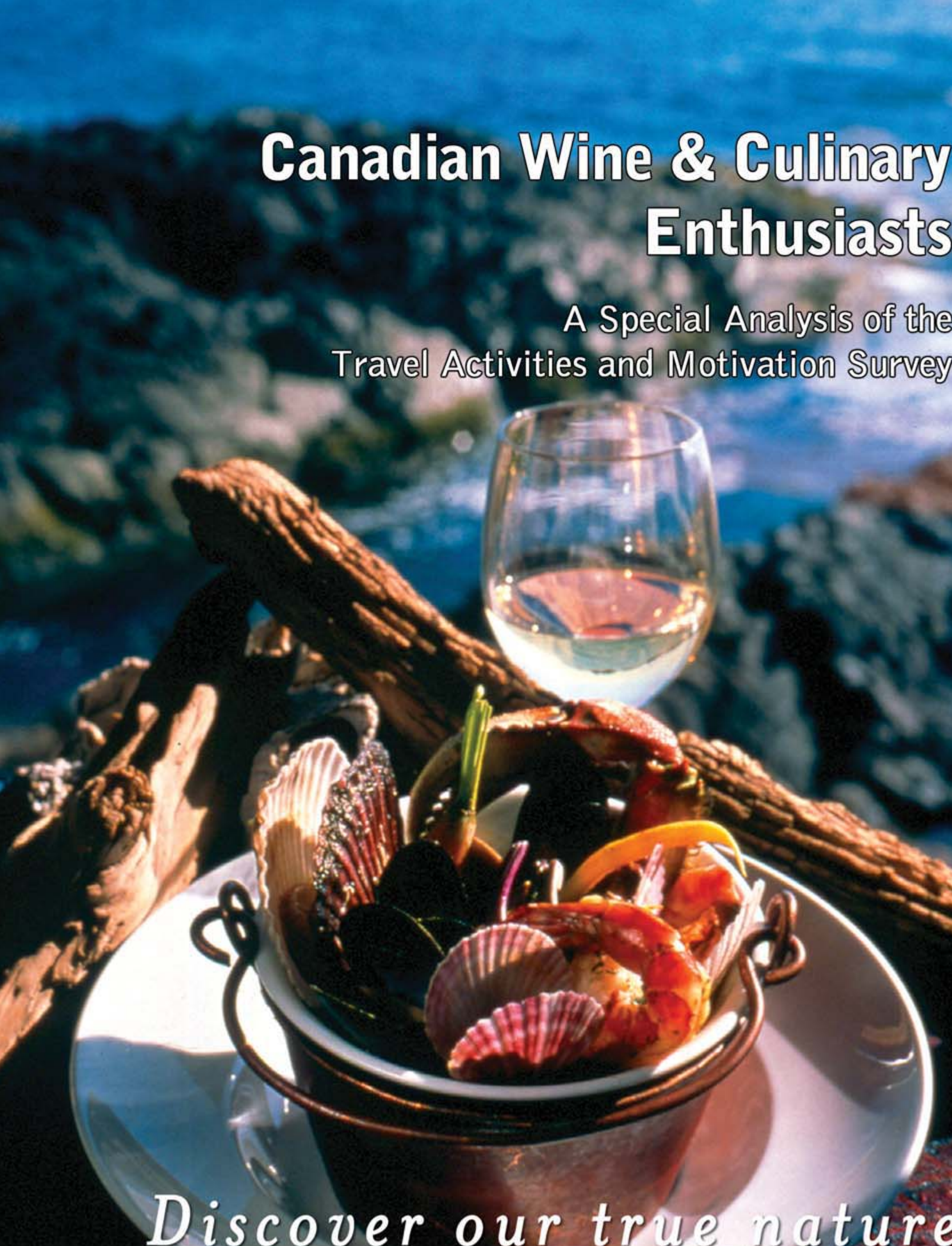
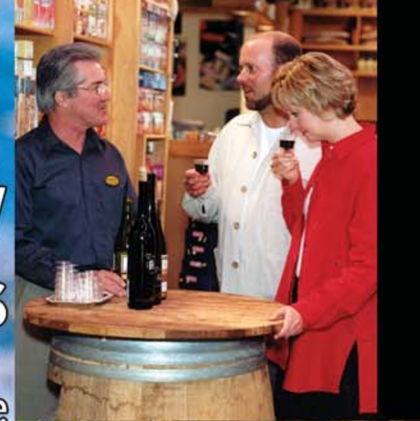
Canadian Wine & Culinary Enthusiasts

A Special Analysis of the Travel Activities and Motivation Survey





TAMS

Discover our true nature

Canadian Tourism Commission

Commission canadienne du tourisme

Canada

Canadian 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 :

Canadian wine & culinary enthusiasts

Issued also in French under title: Touristes canadiens adeptes
du vin et des experiences culinaires.
"A special analysis of the Travel activities and Motivation
Survey (TAMS)"
ISBN 0-662-33867-7
Cat. no. C86-155/2003E

1. Heritage tourism–Canada.
2. Cookery–Economic aspects–Canada.
3. Tourism–Canada.
I. Research Resolutions & Consulting Ltd.
II. Canadian Tourism Commission.

G155.C3C32 2003 338.4'79104648 C2003-980133-0

If you require additional copies, please visit our website at www.canadatourism.com or e-mail your order to the CTC Distribution Centre at: distribution@ctc-cct.ca. Please quote #C50174E when ordering by e-mail.

Table of Contents

1. Introduction

Canada offers a wide range of tourism experiences to its residents. In order to obtain a better understanding of the potential size, characteristics and interests of Canadian 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** – Canadians who have taken leisure trips in Canada and exhibit a particular interest in fine foods and wine. As such, they have taken leisure trips in 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 domestic Wine & Culinary Enthusiast market 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 Canada obtained from Statistics Canada, TAMS data were "aged" twenty-five years into the future. Comparisons of the market size, composition, and travel behaviour of Canadians in 2000 with estimates of the market profile in 2026 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 market – Canadians travelling in Canada. Chapter 4 of this report is devoted to the impacts of population changes on the domestic Wine & Culinary Enthusiasts market.

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

2. Executive Summary

2.1 Wine & Culinary Enthusiasts: Market Size

Of the 23.3 million Canadian adults in 2000, about 1.8 million are Wine & Culinary Enthusiasts (8%). Of these, about 8-in-10 claim to have visited a Canadian destination on a leisure trip in the past two years. Thus, the domestic market for Canada's wine and culinary products is between one and two million Canadian adults (1.5 million).

Canadians from all parts of the country are represented in the Wine & Culinary segment and with some minor variations, mirror the adult population distribution of Canada as a whole.

Domestic tourists in the wine and culinary market travel in Canada's regions in much the same way as does the travelling public at large. As such, they are most apt to have visited Ontario in the past couple of years (64%), followed by Quebec (50%), and less commonly, British Columbia (39%).

Some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of a particular market segment relative to their resident populations. Those that are especially successful in attracting Wine & Culinary Enthusiasts over a two year period relative to their share of the Canadian adult population include Atlantic Canada (3.4) followed by British Columbia (3.0) and Alberta (2.9).

Ontario is the least successful province in attracting these tourists – this province represents 38 per cent of the country's adults and 64 per cent of wine/culinary enthusiasts, for an "attraction rate" of 1.7. Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25 per cent of the adult population and attracting 50 per cent of Wine & Culinary Enthusiasts over a two year period, for a 2.0 "attraction rate".

The U.S.A. is a strong competitor for travel within the wine/culinary activity segment. One-half of these tourists say they have taken a leisure trips to the United States (51%) and over two-fifths have gone to a sun/sea destination over the past couple of years (43%). Close to three-quarters of them have travelled to any destination outside of Canada – including the U.S.A., Europe and other countries – over the past two years (70%). In fact, Europe (27%) and other countries (13%) draw them at two to three times the rate that these destinations attract Canadian travellers as a whole.

2.2 Wine & Culinary Enthusiasts: Demographic Characteristics

Domestic Wine & Culinary Enthusiasts are slightly more likely to be women than men and span the adult age spectrum. Their average age is between 46 and 47 years . . . higher than the age of *all* Canadians adults who travel in Canada over a two year period (43 years).

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

Most Wine & Culinary Enthusiasts live in adult-only households – those with no members under the age of eighteen. Only about one-quarter are likely to be in the market for tourism experiences that take into account the interests and needs of teenagers or children (24%).

Wine & Culinary Enthusiasts span the income and education spectrums, but are appreciably more affluent than are typical domestic visitors in Canada and have more formal education. The differential between "typical" domestic tourists and Wine & Culinary Enthusiasts within Canada is apparent in their average annual household incomes: $54,900 for the typical domestic leisure visitor and $65,500 for the sub-group with a particular interest in food and wine.

Over one-quarter of Wine & Culinary Enthusiasts have at least one university degree (27%) and a further 44 per cent have had some other form of post-secondary education.

Wine & Culinary Enthusiasts are about as likely to be Canadian-born (83%) as is the general domestic travelling public (85%) but are somewhat more likely to have been born in this country than is the Canadian population at large (79%). The relatively low share of *new Canadians* within this market segment is noteworthy from a long term market demand perspective because Canada will be relying more heavily on immigration to sustain its population over the coming decades than it has in the past.

2.3 Wine & Culinary Activities

Of the activities used to define Wine & Culinary Enthusiasts, *day visits to wineries* has the largest following. Approximately 3-in-4 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 (73%)
- Tour a region's wineries (60%)
- Dine at internationally acclaimed restaurants (58%)
- Stay at gourmet restaurant (29%)
- Stay at a cooking school (3%)
- Stay at wine tasting school (2%)

Activities that involve overnight stays at cooking or wine tasting schools or at gourmet restaurants are uncommon 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 domestic Wine & Culinary Enthusiasts travelled in 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

Of the activity-based market segments of special interest to the CTC, Wine & Culinary Enthusiasts represent a larger market than does the Performing Arts Enthusiast market (1.3 million adults), but a smaller market than Soft Outdoor Adventure (5.3 million), Heritage Enthusiasts (2.6 million), and Visual Arts Enthusiasts (2.1 million).

Wine & Culinary Enthusiasts with recent Canadian leisure travel experiences have relatively constricted tourism interests. Approximately two-fifths are also Soft Outdoors Adventure Enthusiasts (39%), less than one-third are Heritage (32%) or Visual Arts Enthusiasts (30%) and even fewer are Performing Arts Enthusiasts (20%).

These overlaps suggest limited opportunities for cross-market packaging and promotion of indoor and outdoor tourism products within the domestic Wine & Culinary Enthusiast market.

2.5 Image Challenges & Media Sources

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

- A place with beautiful scenery
- One of the best destinations for outdoor activities
- A great place to relax and get away from it all
- A place with lots of things for mature adults to see and do
- A place with lots of things for families to see and do
- A place that is very safe for visitors.

This market segment also considers Canada to be a place that has friendly people, is a great summer destination, is clean and well cared for, is a great place to go fishing and/or to experience adventure and excitement.

At the same time, some of the characteristics that might be of special importance in convincing more Canadian Wine & Culinary Enthusiasts to stay in Canada on their travels 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”). Domestic Wine & Culinary Enthusiasts are least positive about Canada as a place 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 Canadian Automobile Association (CAA).

2.6 Impacts of Population Changes

Three fundamental changes in Canada's population structure might be taken into account in tourism planning and product development for domestic Wine & Culinary Enthusiasts over the next two decades.

- Provinces and regions throughout Canada will grow at different rates, with Ontario and British Columbia experiencing the highest growth rates and Quebec and Atlantic Canada experiencing the lowest. At an estimated 37 per cent increase in the adult population of Ontario by 2026 compared to a 27 per cent increase for the entire country, the pool of Ontarians from which Canada has to draw will increase from 8.9 to 12.2 million, and the Toronto CMA will increase from about 3.6 million to 6.1 million by 2026.
- Older people – those who are at least 55 years of age – will represent an increasingly sizeable proportion of the Canadian population. They currently account for over one-quarter of the adult population (28%) but will represent over two-fifths by 2026 (42%).
- Canadian residents born outside Canada will increase from about 21 per cent now to 28 per cent by 2026, with much of this increase being absorbed by major urban centres that act as reception centres for new Canadians, and particularly Toronto and Vancouver. By 2026, more than half of adult residents of each of these metropolitan areas will have been born outside Canada.

2.7 Implications for Wine & Culinary Tourism Enthusiasts

There will be an increase in the absolute number of Canadians who will be in the market for wine and culinary experiences between 2000 and 2026, from an estimated 1.8 million now to about 2.5 million in 2026. Canada's likely share of this market – those who will seek wine and culinary experiences and take leisure trips in Canada – is also expected to grow, from 1.5 million to 2.0 million.

These growth rates are *higher* than the population growth rate of Canada 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 domestic Wine & Culinary Enthusiast market for Canada is older, more affluent and has more formal education than does the typical Canadian tourist.

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

The domestic 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 2026.

Pairing outdoor and wine or culinary experiences for the domestic market, and particularly those outdoor experiences that focus on Canada’s flora and fauna, hiking or backpacking and/or golfing may be a viable packaging and marketing approach in light of Wine & Culinary Enthusiasts’ interest in these types of activities while on trips. There is also some opportunity to package wine and culinary experiences with some *indoor* activities such as general history museums and live theatre performances.

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

3. Canadian 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 23.3 million Canadian adults in 2000, about 1.8 million are Wine & Culinary Enthusiasts (8%). Of these, about 8-in-10 claim to have visited a Canadian destination on a leisure trip in the past two years. Thus, the domestic market for Canada's wine and culinary products is between one and two million Canadian adults (1.5 million).

Table 1: Canadian Wine & Culinary Enthusiasts – Market Size & Comparisons With Other Segments

	CANADIAN ADULTS	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	TOTAL	WINE & CULINARY ENTHUSIASTS
Adults 18+	*23.3 million*	*14.0 million*	*1.5 million*
Wine/Culinary	**1.8**	**1.5**	**1.5**
Soft Outdoor Adventure	5.3	4.4	0.6
Hard Outdoor Adventure	1.6	1.3	0.3
Winter Outdoors	3.6	3.1	0.4
Heritage	2.6	2.2	0.5
Performing Arts	1.3	1.1	0.3
Visual Arts	2.1	1.7	0.4
Alpine Skiing	2.8	2.4	0.4

Source: Special TAMS Tabulations, page 8-1. 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 the Performing Arts Enthusiast market (1.3 million adults), but a smaller market than Soft Outdoor Adventure (5.3 million), Heritage Enthusiasts (2.6 million), and Visual Arts Enthusiasts (2.1 million).

Wine & Culinary Enthusiasts with recent Canadian leisure travel experiences have relatively constricted tourism interests. Approximately two-fifths of Wine & Culinary Enthusiasts are also Soft Outdoors Adventure Enthusiasts (39%), less than one-third are Heritage (32%) or Visual Arts Enthusiasts (30%) and even fewer are Performing Arts Enthusiasts (20%).

3.2 Where They Live & Where They Travel

Canadians from all parts of the country are represented in the Wine & Culinary segment and with some minor variations, mirror the adult population distribution of Canada as a whole. For example, 1-in-12 Canadians live in Atlantic Canada and close to the same proportion of Wine & Culinary Enthusiasts live in these four provinces (5%). Quebec represents one-quarter of the Canadian adult population and the same proportion of wine and culinary enthusiasts (25%). Residents of Ontario and British Columbia are slightly over-represented within the wine/culinary market (41% and 17%, respectively) compared to their proportion of Canadian adults as a whole (38% and 13%, respectively).

Table 2: Place of Residence of Canadian Wine & Culinary Enthusiasts

	Canadian Adults	Recent Leisure Travellers in Canada	
	Total	Total	Wine & Culinary
Adults 18+	*23.3 million*	*14.0 million*	*1.5 million*
Atlantic Canada	8%	8%	5%
Quebec	25%	24%	25%
Montréal CMA	12%	11%	14%
Ontario	38%	35%	41%
Toronto CMA	16%	12%	18%
Manitoba/Saskatchewan	7%	8%	3%
Alberta	9%	11%	10%
British Columbia	13%	15%	17%
Vancouver CMA	7%	7%	9%

Source: Special TAMS Tabulations, pages 1; 26. Percentages may not add to 100 per cent due to rounding. Note: Residents of the Territories were not included in the TAMS survey.

Canadians in the wine and culinary market travel in Canada's regions in much the same way as does the travelling public at large. As such, they are most apt to have visited Ontario in the past couple of years (64%), followed by Quebec (50%), and less commonly, British Columbia (39%). Since many Canadians concentrate their travel *within* the province or region in which they live, it is not surprising that the three most populous provinces achieve the highest share of these tourists. Smaller numbers of Canadians live in Atlantic Canada, Alberta and Manitoba/Saskatchewan and, as a consequence, lower proportions of Wine & Culinary Enthusiasts claim to have taken leisure trips to these destinations in the past couple of years: Atlantic Canada (27%), Alberta (26%) and Manitoba/Saskatchewan (15%) than is the case with the more populous provinces.

Some regions can be said to have particularly high "attraction rates" compared to others because they lure high levels of a particular market segment relative to their resident populations. Those that are especially successful in attracting Wine & Culinary Enthusiasts over a two year period relative to their share of the Canadian adult population include Atlantic Canada (3.4) followed by British Columbia (3.0) and Alberta (2.9).

Table 3: Canadian Wine & Culinary Enthusiasts – Destinations Visited in Past 2 Years

	CANADIAN ADULTS	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	TOTAL	WINE & CULINARY
Adults 18+	*23.3 million*	*14.0 million*	*1.5 million*
Canadian Destinations	60%	100%	100%
Atlantic Canada	11%	18%	27%
Quebec	21%	36%	50%
Ontario	29%	48%	64%
Manitoba/Saskatchewan	9%	15%	15%
Alberta	14%	24%	26%
British Columbia	18%	30%	39%
Territories	1%	1%	1%
Other Destinations			
Any U.S.A. Destination	29%	36%	51%
Mexico/Caribbean	9%	9%	23%
U.K./Other Europe	8%	9%	27%
Other Countries	6%	6%	13%
Sun/Sea Destinations	20%	23%	43%
Any Locations Outside Canada (NET)	39%	45%	70%

Source: Special TAMS Tabulations, pages 2; 27. Percentages do not add to 100 per cent because of multiple destinations.

Ontario is the least successful province in attracting these tourists – this province represents 38 per cent of the country's adults and 64 per cent of wine/culinary enthusiasts, for an "attraction rate" of 1.7. Quebec falls between the high levels evident for Canada's eastern and western regions, representing 25 per cent of the adult population and attracting 50 per cent of Wine & Culinary Enthusiasts over a two year period, for a 2.0 "attraction rate".

The U.S.A. is a strong competitor for travel within the wine/culinary activity segment. One-half of these tourists say they have taken a leisure trips to the United States (51%) and over two-fifths have gone to a sun/sea destination over the past couple of years (43%). Close to three-quarters of them have travelled to any destination outside of Canada – including the U.S.A., Europe and other countries – over the past two years (70%) with Europe (27%) and other countries (13%) drawing them at two to three times the rate that these destinations attract Canadian travellers as a whole.

3.3 Demographic Characteristics of Wine & Culinary Enthusiasts

Wine & Culinary Enthusiasts are slightly more likely to be women than men and span the adult age spectrum. One-quarter fall into the youngest age group (18 to 34) and slightly fewer are in their "family" years (35 to 44, 22%). About one-third are divided between the near-retirement (55 to 64, 17%) and the retirement years (65+, 13%). Their average age is between 46 and 47 years . . . higher than the age of *all* Canadians adults who took leisure trips in Canada over a two year period (43 years).

Table 4: Demographics of Canadian Wine & Culinary Enthusiasts – Gender & Age

	RECENT LEISURE TRAVELLERS IN CANADA	
	TOTAL	WINE & CULINARY ENTHUSIASTS
Adults 18+	*14.0 million*	*1.5 million*
Men	48%	46%
Women	52%	54%
18 - 34 years	33%	25%
35 - 44 years	24%	22%
45 - 54 years	19%	23%
55 - 64 years	12%	17%
65+ years	13%	13%
Average Age	43.4 years	46.5 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 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 domestic visitor in Canada. They also have considerable formal education. Over one-quarter of them fall into a relatively low income group (under $40,000), one-fifth claim to have household incomes in the $40,000 to $60,000 range and one-third between $60,000 to $100,000. Incomes in excess of $100,000 are characteristic of close to 2-in-10 of these food and wine enthusiasts (19%).

Table 5: Demographics of Canadian Wine & Culinary Enthusiasts – Income & Education

	Recent Leisure Travellers in Canada	
	Total	Wine & Culinary Enthusiasts
Adults 18+	*14.0 million*	*1.5 million*
Household Income		
Under $40,000	39%	27%
$40,000 - $59,999	26%	22%
$60,000 - $99,999	25%	33%
$100,000 or more	11%	19%
Average	$54,900	$65,500
Education		
Some Secondary or Less	14%	6%
Completed Secondary	26%	23%
Some Post Secondary	39%	44%
Graduated University	21%	27%

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

This income pattern suggests a market segment with fewer low income and more high income Canadians than those who typically come in Canada. The differential between "typical" domestic tourists and Wine & Culinary Enthusiasts within Canada is most apparent when average annual household incomes are compared: the average household income for the typical domestic leisure visitor is $54,900 and the average for the sub-group with a particular interest in food and wine is $65,500.

Higher household incomes are consistent with higher levels of formal education: over one-quarter of Wine & Culinary Enthusiasts have at least one university degree (27%) and a further 44 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-quarter 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 (24%). Wine & Culinary Enthusiasts are also less likely to live in households with children under twelve years of age (18%) than is the typical domestic leisure tourist (26%).

Table 6: Demographics of Canadian Wine & Culinary Enthusiasts – Household Composition

	Recent Leisure Travellers in Canada	
	Total	Wine & Culinary Enthusiasts
Adults 18+	*14.0 million*	*1.5 million*
Adult Only	65%	76%
Any Teens/Children	35%	24%
Any Children under 12	26%	18%

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

Wine & Culinary Enthusiasts are about as likely to be Canadian-born (83%) as is the general domestic travelling public (85%) but are somewhat more likely to have been born in this country than is the Canadian population at large (79%). The relatively low share of *new Canadians* within this market segment is noteworthy from a long term market demand perspective because Canada will be relying more heavily on immigration to sustain its population over the coming decades than it has in the past. Some of the possible implications of the level of interest in wine and culinary tourism experiences among new Canadians are explored in greater detail in the final chapter of this report.

Table 7: Demographics of Canadian Winter Outdoor Activity Participants – Place of Birth

	Recent Leisure Travellers to Canada	
	Total	Wine & Culinary
Adults 18+	*14.0 million*	*1.5 million*
Born In Canada	85%	83%
Born Outside Canada	15%	17%

Source: Special TAMS Tabulations, pages 7; 32.

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. Three-quarters 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, dining in internationally acclaimed restaurants and, less commonly, staying at a gourmet restaurant with accommodation on the premises.

It is important to note that even though these Wine & Culinary Enthusiasts travelled to Canadian destinations 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 8: Canadian Wine & Culinary Enthusiasts – Activities Used To Define Market Segment

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*1.5 million*
Go to wineries for day visits	73%
Tour a region's wineries	60%
Dine at internationally acclaimed restaurants	58%
Stay at gourmet restaurant with accommodation on the premises	29%
Stay at a cooking school with accommodation on the premises	3%
Stay at a wine tasting school with accommodation on the premises	2%

Source: Special TAMS Tabulations, page 10-5.

Other *defining* activities that involve overnight stays at cooking or wine tasting schools 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 the domestic market, and particularly those outdoor experiences that focus on Canada's flora and fauna, hiking or backpacking and/or golfing may be a viable packaging and marketing approach in light of Wine & Culinary Enthusiasts' interest in these types of activities while on trips. About two-fifths of this market segment view wildlife and/or observe wild flora, go hiking or backpacking and/or golf while on their travels. Approximately one-third cycle, fish and/or go whale watching. Somewhat fewer might have been found canoeing or kayaking or alpine skiing on recent trips.

Table 9: Canadian Wine & Culinary Enthusiasts – Other Outdoor Activities

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*1.5 million*
Wildlife viewing	42%
Hiking/backpacking in wilderness settings	40%
Wildflowers / flora viewing	38%
Golfing	38%
Cycling	32%
Fishing	31%
Whale watching	30%
Kayaking or canoeing	27%
Downhill skiing	24%
Bird watching	18%
Sailing	16%
Cross-county skiing	15%
Horseback riding	12%
Scuba diving	10%
Snowmobiling	9%
White water rafting	7%
Hunting	7%
Rock climbing	5%
Motorcycling	5%
Wind surfing	5%
Snowboarding	4%
Hot air ballooning	3%
Parachuting	2%
Dog sledding	2%

Source: Special TAMS Tabulations, pages 9-1/3.

Between one-fifth and one-sixth go bird watching, sailing and cross-country skiing. Niche activity markets that might attract the Wine & Culinary Enthusiast include scuba diving, snowmobiling, white water rafting, and hunting.

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

3.4.3 Heritage Activities

As noted earlier, there is not appreciable overlap between the 1.5 million Wine & Culinary Enthusiasts and the group of Canadian travellers who are defined as Heritage Enthusiasts. Nonetheless, about half of Wine & Culinary Enthusiasts go to general history museums while travelling. Other heritage experiences that might prove attractive to Wine & Culinary Enthusiasts include farmers' fairs or markets as well as local festivals and fairs. These heritage experiences have attracted at least two-fifths of the Wine & Culinary Enthusiast segment while on a trip in the past couple of years.

Table 10: Canadian Wine & Culinary Enthusiasts – Heritage Activities

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*1.5 million*
General history museums	52%
Farmers' fairs or markets	44%
Local festivals or fairs	39%
Science & tech museums	36%
Historic sites	32%
Historical replicas of cities/towns	26%
Pick your own farms / harvesting	25%
French Canadian cultural experiences	17%
Pow Wow/other Aboriginal celebrations/attractions	15%
Children's museums	10%
Western theme events	10%
Carnivals such as Caribana/ Mardi Gras or Rio's Carnival	6%

Source: Special TAMS Tabulations, page s 10-1/4

3.4.4 Performing & Visual Arts Activities

Wine & Culinary Enthusiasts are apt to go to live theatre performances when they travel (51%), 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 concerts, theatre festivals, or music festivals.

Table 11: Canadian Wine & Culinary Enthusiasts – Performing & Visual Arts Activities

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*1.5 million*
Performing Arts	
Theatre	51%
Classical music concerts	24%
Theatre festivals	22%
Music festivals	21%
Jazz music concerts	16%
Ballet or other dance	15%
Opera	14%
Literary festivals	8%
Musical attractions such as Jazzland	7%
Visual Arts	
Local arts & crafts studios	69%
Art galleries	48%
International film festivals	9%

Source: Special TAMS Tabulations, pages 10-1/5.

Shopping or browsing in local arts and crafts studios (69%) and, to a lesser extent, going to art galleries (48%) are also widely sought by Canadian Wine & Culinary Enthusiasts while on their trips. These activities characterize the Visual Arts Enthusiast segment – a segment with a 30 per cent level of overlap with Wine & Culinary Enthusiasts.

3.4.5 Other Attraction-Based Activities

Zoos, botanical gardens and, to a lesser extent, aquariums and casinos have appeal to Canadian Wine & Culinary Enthusiasts on their travels. These attractions may provide daytime activities for gourmands prior to their diner at an internationally acclaimed restaurant and *indoor* activities for visitors who might be touring Canada's vineyards.

Table 12: Canadian Wine & Culinary Enthusiasts – Other Activities

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*1.5 million*
Zoos	45%
Botanical gardens	41%
Aquariums	34%
Casinos	30%
Planetariums	18%
Horse races	12%
Auto races	11%

Source: Special TAMS Tabulations, pages 10-3/5.

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 Canadians in the Wine & Culinary Enthusiast segment who refrain from offering an opinion.

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

- A place with beautiful scenery
- One of the best destinations for outdoor activities
- A great place to relax and get away from it all
- A place with lots of things for mature adults to see and do
- A place with lots of things for families to see and do
- A place that is very safe for visitors.

This market segment also considers Canada to be a place that has *friendly people*, is a great *summer* destination, is *clean and well cared for*, is a great place to go *fishing* and/or to *experience adventure and excitement.*

At the same time, some of the characteristics that might be of special importance in attracting more Canadian Wine & Culinary Enthusiasts to stay at home on their travels 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"). Domestic Wine & Culinary Enthusiasts are least positive about Canada as a place with a *popular or trendy* image.

Table 13: Canadian Wine & Culinary Enthusiasts – Attitudes Toward Canada

	Recent Leisure Travellers to Canada		
	Total	Wine & Culinary Enthusiasts	
Adults 18+	*26.3 million*	*1.5 million*	
	Average #	Average #	Can't Rate %
Beautiful scenery	9.2	9.1	1%
One of best destinations for outdoor activities	8.2	8.8	7%
Great place to relax	8.6	8.6	2%
Lots for mature adults	8.6	8.6	8%
Lots for families	8.5	8.5	6%
Safe for visitors	8.3	8.5	4%
Place with friendly people	8.4	8.4	4%
One of best summer destinations	8.1	8.4	3%
Clean/well cared for	8.7	8.3	3%
Great place for fishing	8.7	8.3	21%
Great place to experience adventure & excitement	8.0	8.3	9%
Lots for young adults	8.1	8.1	10%
Many cultural events & attractions	7.8	8.1	6%
Respects natural environment	8.5	7.9	8%
Great place for hunting	8.4	7.9	38%
Place with interesting shops	8.0	7.9	6%
Great place to see historic sites	7.5	7.9	6%
Great place to experience city life	7.7	7.7	6%
Great place to experience different cultures and ways of life	7.6	7.7	7%
Great place for Aboriginal culture	7.4	7.6	19%
Great place to experience "good life"	7.1	7.6	4%
One of best winter destinations	6.3	7.6	3%
Offers excellent value for money	7.9	7.5	6%
Place for romance	7.2	7.5	15%
Popular, trendy place	6.6	7.0	13%

Source: Special TAMS Tabulations, page 14. 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.

Most Canadians in the Wine & Culinary Enthusiast segment claim to read or look into their local newspapers on a regular basis, including the weekday (79%) and weekend editions (78%). Furthermore, almost three-fifths read the *travel section* of weekend editions on a regular basis and one-half claim to read or look through the travel section of weekday editions.

Table 14: Canadian Wine & Culinary Enthusiasts – Print Media Read Regularly

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*1.5 million*
Daily Newspaper (Any)	**86%**
Weekday edition	79%
Travel section of weekday edition	49%
Weekend edition	78%
Travel section of weekend edition	57%
Community newspapers	73%
Any Magazines	**94%**
News magazines	61%
Travel magazines	46%
Fashion/homemaking magazines	46%
Hobby magazines	42%
Canadian /National Geographic	40%
General interest/city life magazines	33%
Sports magazines	19%

Source: Special TAMS Tabulations, page 15.

These tourists are also avid magazine readers (94%). Just over 6-in-10 read news magazines and close to half read travel and/or fashion/homemaking magazines on a regular basis. Two-fifths say that they read hobby and/or Canadian or National Geographic regularly. General interest and city life magazines are popular among about 1-in-3 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 more than 6-in-10 claim to watch nature shows regularly. Early evening news broadcasts, evening sitcoms and late evening news are also particularly popular within this market segment, followed by evening dramas and instructional or hobby shows. At least half of these Wine & Culinary Enthusiasts say they are regular viewers of these types of television programming.

Table 15: Canadian Wine & Culinary Enthusiasts – Television Programs Viewed Regularly

	Wine & Culinary Enthusiasts
Adults 18+	*1.5 million*
Movies	70%
Nature shows	66%
Early evening news	63%
Evening sitcoms	60%
Late evening news	59%
Evening drama	57%
Instructional/hobby shows	54%
Professional sports	47%
Morning news	29%
Daytime programs on weekdays	17%

Source: Special TAMS Tabulations, page 17.

With the exception of automobile associations such as the CAA (48%) and sports clubs (28%), Wine & Culinary Enthusiasts in Canada are not *joiners*.

One-fifth of them are, however, attendees at sportsmen's shows, RV/camper shows, boat shows and/or consumer travel shows on a regular basis. These venues may prove to be important marketing channels to get information about Canada's wine and culinary products to domestic Wine & Culinary Enthusiasts.

Table 16: Canadian Wine & Culinary Enthusiasts – Club/Organization Memberships & Consumer Trade Show Attendance

	WINE & CULINARY ENTHUSIASTS
Adults 18+	*1.5 million*
Club/Organization Membership	
Auto club	48%
Sports club	28%
Nature organization	10%
Art gallery/museum	8%
Zoo/botanical garden	3%
Gardening club	5%
Regular Attendance at Travel/Trade Shows	
Sportsmen's shows	22%
RV/Camper shows	19%
Boat shows	19%
Travel shows	21%

Source: Special TAMS Tabulations, pages 18/19.

4. Projections to 2026

4.1 Introduction

In 2000, there were approximately 23.3 million Canadians 18 years of age or older. Statistics Canada projects that this number will increase to 29.6 million by the year 2026, for an increase of 27 per cent. When this population increase is applied to the TAMS data, estimates of market size and characteristics in 2026 can be estimated, assuming that people in various age, gender and regional groups behave in 2026 as they did in 2000.

Because the population will not grow at the same rate among all age groups or in all regions of Canada, tourism businesses and marketers should anticipate and prepare for changes in travel activities and interests in the domestic market over the next two decades. In this chapter, some important structural shifts are described for Canada as a whole. Subsequently, expected change in the domestic wine and culinary 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

Canada's Adult Population – Gender & Age

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Men	49%	49%	27%	1%
Women	51%	51%	27%	-1%
18 - 34 years	31%	25%	0.47%	-98%
35 - 44 years	23%	17%	-7%	-124%
45 - 54 years	18%	16%	11%	-61%
55 - 64 years	12%	16%	77%	184%
65+ years	16%	26%	111%	309%

Source: Special TAMS Canada Tabulations, Table 1.

Percentage of Adult Population In . . . 2000 Proportion of Canadian 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 31 per cent of all Canadian adults, or 7.3 million of the 23.3 million Canadian adults (2000).

Percentage of Adult Population In . . . 2026 Proportion of Canadian adults in 2026 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 25 per cent of all Canadian adults, or 7.3 million of the 29.6 million Canadian adults (2026).

Growth Rate from 2000 to 2026 Anticipated rate of change in the number of Canadian adults who will fit the demographic or behavioural characteristic by 2026. **Example:** the 7.3 million 18 – 34 year olds in 2026 is virtually identical to the 7.3 million 18 – 34 year olds in 2000.

Impact of 2026 Population Structure on Growth Rate How much the structure of the population projected for 2026 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 (0.47%) will be 98 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 2026, there would have been 9.2 million young adults in Canada, or 27 per cent more than there were in 2000 but changes in the population structure bring this number down to 7.3 million or the same number as there were in 2000, for a difference in the growth rate [0.47%/27%] of -98 per cent.

4.3 Regional Changes in the Canadian Market

The adult population in different parts of the country will change at different rates, with Atlantic Canada and Quebec experiencing the *lowest* growth rate (8% each) and British Columbia (49%) and Ontario (37%), followed by Alberta (33%) experiencing the highest growth rates. Manitoba and Saskatchewan will experience growth at a level that is substantively below the national average (14% versus 27%).

Quebec and Atlantic Canada will increase in population over the next two decades but they will do so at a rate of growth that is about two-thirds *lower* than would have occurred if the population structure of 2000 were to remain intact through 2026. In contrast, British Columbia will grow at a rate that is appreciably *higher* than would have been predicted based on today's population structure (81% higher).

Table 17: Regional Shifts in Canadian Adult Population

Adults 18+ in millions	Canadian Adult Population In . . . 2000	2026	Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
Total Canada	**23.3**	**29.6**	**27%**	
Atlantic Canada	1.8	2.0	8%	-69%
Quebec	5.8	6.2	8%	-70%
Montréal	2.7	3.7	38%	42%
Ontario	8.9	12.2	37%	35%
Toronto	3.6	6.1	70%	156%
Manitoba/Saskatchewan	1.6	1.8	14%	-49%
Alberta	2.2	2.9	33%	22%
British Columbia	3.0	4.5	49%	81%
Vancouver	1.5	2.4	57%	108%

Source: Special TAMS Canada Tabulations, Table 5.

Ontario residents will represent over two-fifths of all adult Canadians by 2026, experiencing a growth rate of 37 per cent – a rate that is approximately one-third higher than would be predicted based on the population structure of 2000.

Of particular note in projections of Canada's population growth is the increasing *urbanization* of the country.

- Even though Quebec's total population will grow from 2000 to 2026 by only eight percent, Montréal CMA's population is expected to grow at over four times this rate (38%), from about 2.7 million adults to 3.7 million.
- Growth for the Toronto CMA is expected to be even more meteoric – the adult population of this city is expected to grow from 3.6 million to 6.1 million in 2026, for a growth rate of 70 per cent – almost twice the provincial average (37%) or 1.5 times higher than would be expected given today's population structure (156%).
- Vancouver CMA will also grow at a rate (57%) that is higher than the rate predicted for the province (49%), from 1.5 million in 2000 to 2.4 million in 2026.

4.4 Demographic Changes in the Canadian Market

Changes to the demographic profile of Canadians over time are apt to have an especially dramatic impact on Canada's tourism volume and value, and the types of activities the domestic market will seek on its 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 from 1-in-3 to 1-in-4 adult Canadians by 2026;
- Canadians in their "family" years (35 – 44) will fall from over 1-in-5 members of the adult population to about 1-in-6;
- Middle-aged Canadians (45 – 54) will come close to holding steady as a proportion of the total population, from 18 per cent in 2000 to 16 per cent in 2026;
- Starting at about age 55, the pattern shifts with older people representing *higher* proportions of Canada's adult population in 2026 than they do now. The increase is most prominent among Canadians 65 years of age or older. This older group currently represents about one-sixth of the adult population but by 2026 it is expected to represent over one-quarter.
- In absolute numbers, the young adult population (18 – 34 years) will shift from 7,252,000 to 7,286,000 between 2000 and 2026. This young cohort is growing at a rate that is 98 per cent lower than would have been expected if the structure of the population had remained constant between 2000 and 2026. Thus, the impact of changes in the population mix in Canada 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 decrease in the absolute numbers of Canadians in the 35 to 44 year age bracket – from 5,313,000 in 2000 to 4,960,000 in 2026.

Table 18: Canadian Adult Population – Gender & Age

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Men	49%	49%	27%	1%
Women	51%	51%	27%	-1%
18 - 34 years	31%	25%	0.47%	-98%
35 - 44 years	23%	17%	-7%	-124%
45 - 54 years	18%	16%	11%	-61%
55 - 64 years	12%	16%	77%	184%
65+ years	16%	26%	111%	309%

Source: Special TAMS Canada Tabulations, Table 1.

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 Canadians by 2026 as they do now, or 7.7 million instead of the current 3.7 million.

4.4.2 Household Income & Education

The proportion of Canadian adults with household incomes in various groups from *low* to *high income* are not expected to change substantively between now and 2026. Nonetheless, reflecting the increase in new Canadians and in the number of Canadians no longer in the labour force, *low income* Canadians will grow at a higher rate (37%) than will the population as a whole (27%).

Table 19: Canadian Adult Population – Household Income & Education

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*	*27%*	
Household Income				
Low Income	47%	51%	37%	36%
Low - Middle	23%	22%	19%	-30%
Middle – High	21%	19%	15%	-46%
High Income	9%	8%	15%	-46%
Education				
Some Secondary or Less	20%	11%	-29%	-206%
Completed Secondary	26%	28%	37%	34%
Some Post Secondary	36%	40%	44%	62%
Graduated University	18%	20%	42%	54%

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

As the youth market declines, the number of young people who are still in secondary school will also decline. Apart from this substantive change, a slightly higher proportion of Canada's adult population will have some post-secondary education or a university diploma in 2026 than they have now.

4.4.3 Household Composition

The 2026 age mix of Canadians 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 1-in-3 in 20000 to 1-in-4 by 2026. Conversely, those who live in adult-only households (no children or teenagers) will increase from 66 per cent to 74 per cent.

Table 20: Canadian Adult Population – Household Composition

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Adult Only	66%	74%	42%	54%
Any Teens/Children	33%	26%	-2%	-107%
Any Children under 12	25%	19%	-1%	-105%

Source: Special TAMS Canada Tabulations, Table 4. Percentages may not add to 100 per cent due to rounding and/or duplication across categories.

4.4.4 Place of Birth

Assuming present immigration policies, the proportion of Canadian adults who will have to come Canada from other countries will reach 28 per cent in 2026 from the current 21 per cent. As noted earlier, Canada's major cities will be the reception centres for many of the country's new residents. By 2026, over half of Toronto's population will be new immigrants to Canada (54%). The same scenario will be in place for Vancouver (53%). An appreciably lower proportion of the Montréal population will be new Canadians by 2026 (28%) but this proportion is noticeably higher than the current level (20%). As noted elsewhere in this report, increases in the proportion of *new Canadians* over the next two decades will likely pose special challenges for the wine and culinary market segment.

Table 21: Canadian Adult Population – Place of Birth

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Born in Canada	79%	72%	16%	-39%
Born Outside Canada	21%	28%	66%	144%

Source: Special TAMS Canada Special Tabulations.

4.5 Destination Choices

Over the next two decades, Canadians will continue to take leisure trips in Canada but will be increasingly drawn to destinations outside the country. In part because of increasing numbers of immigrants who travel to their country of origin and in part because the aging population will seek respite from Canada's winter, destinations in the U.S.A., Europe and other foreign countries will see increases in the proportion of Canadian tourists. Thus, as the population ages between 2000 and 2026, retention of Canadians for Canadian destinations will become an increasing challenge.

Table 22: Canadian Adult Population – Destinations Visited on Leisure Trips in Past Couple of Years

	% of Adult Population In . . .		Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
	2000	2026		
Adults 18+	*23.3 million*	*29.6 million*		
Canada	60%	59%	24%	-10%
U.S.A.	29%	32%	40%	47%
Sun/Sea Destinations	20%	21%	37%	36%
Mexico/Caribbean	8%	8%	27%	0%
U.K./Europe	8%	10%	59%	118%
Other Countries	6%	8%	60%	121%

Source: Special TAMS Canada. Tabulations, Tables 24 - 31.

4.6 Wine & Culinary Enthusiasts

As noted in the demographic profile section of this report, the Wine & Culinary Enthusiast market tends to attract middle-aged and older travellers. Younger Canadians, and particularly those between 18 and 34 years of age, are substantively under-represented in this segment.

Because the Canadian population will shift over the next two decades to an older one, the very characteristics that define Wine & Culinary Enthusiasts help explain why growth in this market is predicted to be 40 per cent **higher** than would have been expected given today's population structure. The total domestic wine and culinary market is predicted to grow from 1.8 million in 2000 to 2.5 million by 2026.

A similar pattern is evident for changes in the wine and culinary market segment that takes leisure trips within Canada. This population is expected to increase from 1.5 million now to 2.0 million in 2026. At 36 per cent, this growth rate is about 32 per cent **higher** than would have been expected given today's population structure. The *difference* in projected growth rates between the segment as a whole and the portion that will likely take leisure trips in Canada by 2026 is likely a function of the strong attraction European, sun/sea and other overseas destinations have for Wine & Culinary Enthusiasts. Even though the market is a growing one, it will likely prove to be a challenge to entice these Wine & Culinary Enthusiasts to *Canadian* destinations.

For purposes of contrast, the table also displays predicted growth rates for other key CTC activity-based market segments. Clearly, segments such as Heritage Enthusiasts, and Performing Arts Enthusiasts – segments like the Wine & Culinary segment that involve little physical exertion – will grow at much higher rates than those such as soft outdoor adventure or winter outdoor activity participants. These differences undoubtedly reflect the needs and interests of an aging Canadian population.

Table 23: Canadian Adult Population – High Intensity Activity Groups

Adults 18+ in millions	% of Adult Population In . . . 2000	2026	Growth Rate from 2000 to 2026	Impact of 2026 Population Structure on Growth Rate
Total Canadian Adult Population	23.3	29.6	27%	
Wine & Culinary Enthusiasts	1.8	2.5	38%	40%
Wine & Culinary Enthusiasts Who Take Leisure Trips in Canada	**1.5**	**2.0**	**36%**	**32%**
Other CTC Activity Groups - Leisure Trips in Canada				
Winter Outdoors Activity Participants	3.1	3.4	11%	-61%
Alpine Skiing	2.4	2.6	9%	-67%
Soft Outdoor Adventure Enthusiasts	4.4	4.8	9%	-66%
Hard Outdoor Adventure Enthusiasts	1.3	1.4	9%	-66%
Heritage Enthusiasts	2.2	3.0	37%	36%
Performing Arts Enthusiasts	1.1	1.5	44%	61%
Visual Arts Enthusiasts	1.7	2.4	39%	43%

Source: Special TAMS Canada. 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 behavior 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 Canada TAMS Mailback Questionnaire

	UNWEIGHTED RECORDS – MAILBACK
Adult Leisure Travellers in Canada in the Past 2 Years	4,272
Soft Outdoor Adventure Enthusiasts	1,241
Hard Outdoor Adventure Enthusiasts	361
Wine/Culinary Enthusiasts	454
Heritage Enthusiasts	762
Performing Arts Enthusiasts	331
Visual Arts Enthusiasts	608
Winter Outdoors (excluding alpine skiing)	844
Alpine Skiing	651

Source: Special TAMS Canada 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 Attraction Rates

Table A-2: Attraction Rates

	Proportion of Canadian Adult Population	Proportion of Wine/Culinary Enthusiasts Visiting . . . Region	Attraction Rate
Atlantic Canada	8%	27%	3.4
Quebec	25%	50%	2.0
Ontario	38%	64%	1.7
Manitoba/Saskatchewan	7%	15%	2.1
Alberta	9%	26%	2.9
British Columbia	13%	39%	3.0

Source: Special TAMS Canada Tabulations, special calculations.
Note: Proportion of segment visitors to Canada's regions will add to more than 100 per cent because of visits to multiple provinces over the two-year reporting period.

5.4 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