

The American Culinary Traveler 2013



Mandala Research, LLC

Insight • Strategy • Results

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Objectives and Methodology

- ✓ Uncover specific characteristics of the trips that American Culinary travelers take, including the amount of money spent and other activities they engage in while traveling
- ✓ Identify the most popular destinations for wine and culinary travel
- ✓ Identify new trends in culinary tourism to support destinations and travel companies increase their understanding of this market and refine their marketing strategies
- ✓ Identify the online and social media channels that are most used by Culinary travelers to search for information and recommendations

Mandala Research conducted 2,113 web interviews between May 2 and May 10, 2013. All interviews were conducted via an *online panel* and lasted approximately 23 minutes on average.

To qualify for the survey, respondents must have taken at least one trip in the past 12 months for pleasure, vacation or personal purposes within the United States that was:

- 50+ miles away from home one-way; or,
- where the traveler spent at least one overnight; and,
- where the traveler had shared or sole responsibility for planning the trip.

The sample for the survey was balanced by age, gender, geographical region, race and ethnicity to represent the demographics of the population according to figures reported by the U.S. Census Bureau.

Reported results may not equal 100% due to rounding and exclusion of “Don’t Know/Rather Not Say” response options.

A full demographic profile of respondents can be found in [Appendix A](#).

Methodology, Cont'd

In survey research, the entire population is typically not interviewed, but rather a sample of the population is polled. Therefore, the data are subject to sampling error. The maximum sampling error of the data for the total sample of 2,113 interviews is +/- 3.03 percentage points at the 95% level of confidence. However, the sampling error will vary as subgroups of differing sample sizes are examined throughout this report. Sampling errors are shown below for the total sample.

		Sampling Error					
Total Sample	If the percentage found is around:	50%	40% or 60%	30% or 70%	20% or 80%	10% or 90%	1% or 99%
n=2113	Then the sampling error in percentage points would be +/-:	3.03	2.97	2.77	2.42	1.82	0.60

For example, if a question asked among the total sample yielded a response with a percentage of 99%, then we can be sure 95 out of 100 times that the true percentage point in the population would lie between 98.4% and 99.6% (99% +/- .6 percentage points.)

For this report, generations are defined as follows:

- Gen Y / Millennials: Under 29 years of age
- Gen X: 29-44 years of age
- Baby Boomers: 45-64 years of age
- Matures: 65+ years of age

Statistical significance is indicated in **RED** or with a **circle** around the number and is *calculated within the specific set of subgroups being analyzed*, for example, within income, gender, generations, or Culinary profile, and not across the entire population.

Key Findings and Implications

Key Findings

Culinary Travelers:

- Leisure travelers represent 71% of the adult population in the U.S., or approximately 170 million Americans.
- Three-quarters of all leisure travelers (77%, representing 131 million Americans) can be classified as Culinary travelers, having participated in one of several specified culinary activities within the past three years.
- Culinary travelers can be divided into three segments based on the role culinary activities played in motivating their trips over the past three years:
 - **Deliberates:** those took one or more trips where the availability of culinary activities was a key reason they took a trip or where the availability of culinary activities helped them choose between potential destinations (30% of all Culinary travelers).
 - **Opportunistics:** Those who took one or more trips where they sought out culinary activities, but who say those activities were not a factor in choosing between destinations (26% of all Culinary travelers).
 - **Accidentals:** Those who took one or more trips where they participated in culinary activities simply because they were available (19% of all Culinary travelers).
- Most leisure travelers are not familiar with the term “Culinary Tourism” (only 38% have heard of it). At the same time, overall awareness of the term has increased from 2006 (when 22% had heard of it).
 - Still, about half of all leisure travelers say they travel to learn about or enjoy unique and memorable eating and drinking experiences (51%), a notable jump over 2006 (when 40% said they traveled for these reasons).
- Roughly half of Culinary travelers say the monikers “Culinary Traveler” (52%) or “Food Traveler” (53%) describe them, a higher level than is seen among leisure travelers overall (42% and 44% of whom identify with these names, respectively).
 - From the World Food Travel Association’s 13 food traveler types, American Culinary travelers are by far most likely to describe themselves as “Authentic,” “Localist,” or “Budget” travelers (with more than half saying one or more of these terms describe them).
 - Eight out of ten Culinary travelers enjoy learning about the local culture and cuisines of the destinations they visit (83%) or say they are more inclined to spend more money on food and drinks while traveling (82%).

Trip Characteristics:

- Culinary travelers – much like the average leisure traveler overall – take nearly one trip every other month, including four domestic leisure trips, two domestic business trips, and one international trip.
- Culinary travelers are willing to go long distances to participate in culinary activities, traveling an average of 933 miles on their last trip.
 - Culinary travelers fly (47%) as often as they drive their own cars (50%) on culinary trips.
- On average, Culinary travelers spend roughly four nights away from home on their culinary trips.
 - Two out of three Culinary travelers stay at a hotel, motel, or resort (63%). Nearly one-third stay with friends and relatives (32%), and only a relative few use any other type of accommodation.
- The average Culinary traveler spends nearly \$1,500 on their culinary trips (including transportation, lodging, entertainment, food and dining), compared to approximately \$1,200 for all leisure travelers.
 - Culinary activities account for 18% of the total spend on culinary trips, on average.
 - Transportation (\$386, on average) and lodging (\$359) are the most expensive elements of culinary trips.
 - Spending on food and dining (\$296) equals the spending on entertainment and shopping combined (\$281).

Trip Motivations and Activities:

- Although non-culinary attributes like cost and convenience are primary drivers of destination choice for both leisure travelers overall and Culinary travelers in particular, Culinary travelers are especially likely to take into account a variety of culinary factors in their destination decision, such as unique restaurant atmosphere, unique foods, foods that are not available in their area, visitor guides that include information on local wines or dining, and the availability of gourmet restaurants.

Key Findings

- Only about one out of five Culinary travelers have participated in a wine-related activity on a trip in the past three years (18%).
 - However, 70% of those who did engage in wine-related activities say those activities were a factor in driving the destination decision.
- One out of four Culinary travelers have participated in beer-related activities on a trip within the past three years (25%).
 - Four out of ten Culinary travelers who participated in a beer-related activities say those activities were a driver of their trip (40%).

Culinary Destinations:

- More than half of all American leisure travelers say Europe holds the “number one culinary destination in the world” (56%) with nearly all of these citing France or Italy specifically as the top destination. Fewer than half as many (26% overall) list a destination in the U.S. as the “number one culinary destination.”
 - When asked what destinations in the U.S. come to mind for Culinary tourism, New York City is the top mention, followed by New Orleans, San Francisco, and Chicago.

Planning and Booking:

- Computers remain by far the most popular devices for gathering information, planning trips, and booking travel.
- Recommendations from others, general web searches, and destination websites are the most common tested resources for researching a trip with culinary activities, with each typically used by about half of leisure travelers overall. Fewer, but still nearly four out of ten leisure travelers, use online reviews to research culinary trips.