

California Proprietary Questions
The Culinary Traveler Report
June, 2013

In Mid May, Issues & Answers Network conducted 2113 web interviews. All interviews were conducted via an *online* panel and lasted approximately 23 minutes.

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 have shared or have sole responsibility for travel planning.

The sample for the survey was balanced by age, gender, geographical region, race and ethnicity according to the latest population parameters reported by the U.S. Census Bureau while simultaneously being adjusted for known response rates among these demographics within the online panel. The advantage of this methodological approach is that the incidence of leisure travelers from each demographic segment can be extrapolated, versus the population as a whole.

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

Defining Culinary Travelers

The Culinary Traveler Study focused on U.S. residents who indicated that they had traveled over 50 miles, one way, for pleasure, personal, business or a combined business/pleasure trip in the last 12 months.

Further, travelers were asked about trips that had taken within the past three years where they may have participated in culinary activities (listed below):

- Taking a tour of a food or drink production facility or factory
- Attended a cooking school or other cooking class instruction
- Apart from purchasing everyday food, gone shopping in a local grocery store, local gourmet store, wine or liquor store, or other food or drink retail store for the sole purpose of buying something special or a food/drink souvenir
- Attended a food or drink festival
- Visited a farm or farmers' market
- Visited a culinary attraction like a famous chef's home or restaurant or bar where a famous drink or dish was first made
- Participated in a culinary tour of a destination
- Stayed in food-oriented lodging, like a B&B, cleansing/wellness spa or resort, or other lodging property with a clear, distinct emphasis on their food experience

Travelers who had taken a trip within the past three years where they participated in one or more of these activities were then classified as "Culinary Travelers."

Over three-quarters (77%) of respondents were identified as Culinary Travelers.

Defining Culinary Travelers

Culinary Travelers (N=1618) were then segmented according to driver of destination choice as defined in the following question:

Thinking about all the trips you have taken over the past three (3) years in which you participated in culinary activities (cooking classes, dining out for an unique and memorable experience, farmers markets, gourmet food shopping, etc.) or attended food festivals, which if any, of the following applies to you? (Please select all that apply)

Deliberate
30%

1. I took one or more trips where the availability of culinary activities was a key reason I chose to take the trip.
2. I took one or more trips where the availability of culinary activities helped me choose between potential destinations

Opportunistic
26%

- 3. I took one or more trips where I sought out culinary activities but they were not a factor in choosing between destinations

Accidental
19%

- 4. I took one or more trips where I participated in culinary activities simply because they were available.

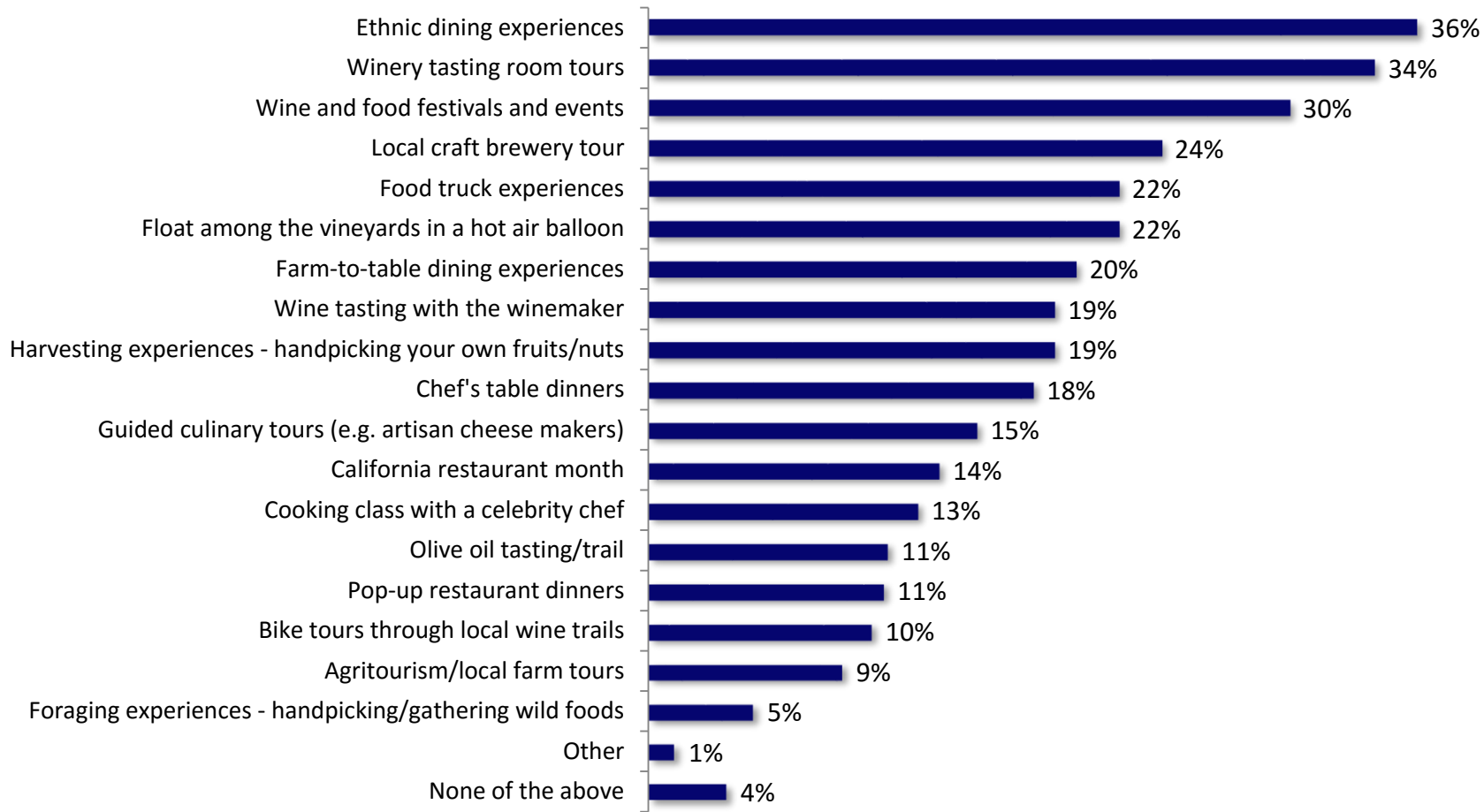
Unclassified
25%

- 5. None of the Above

(Note that while the respondent was able to select multiple answers, the respondent was placed into the segment that corresponded with their highest driver of destination choice. For example if a respondent checked #2 AND #3, they were placed into the Deliberates segment.)

Most Appealing Culinary Experiences in California

Potential visitors to California are most interested in experiencing ethnic dining, wine tastings, wine and food festivals. Given that respondents were asked to choose up to five, no single experience garners more than about a third of leisure travelers.



CA1. If you were considering travel to California, which of these culinary experiences would you find most appealing (choose up to 5): [Base: All respondents: n=2113]

Culinary Experiences in California

All groups expressed interest in ethnic dining, winery tastings, wine and food events and festivals, these three culinary experiences were among the most appealing for the majority of travelers. However, nuances among generations and culinary segments are worthy of note. No one experience garnered more than two-fifths of respondents demonstrating that the variety of culinary offerings in California should be highlighted.

While winery tasting rooms are popular with over a third of all travelers and an even higher percentage of matures and those with incomes over \$75k, wine tastings with the winemaker was less popular. Overall about one fifth of each segment found this activity appealing.

Among types of dining experience, farm to table is more appealing than chef's table, and chef's tables are more appealing than pop up restaurant, however, these food experiences fell below food truck experiences. Food truck experiences are more appealing to those under 45.

About a third of Gen Y said they would find floating in a hot air balloon most appealing, the highest of the generations. This activity ranks second for them, tied with wine tasting room tours and just slightly behind ethnic dining experiences. Over a fifth of those under 29 find biking through wine trails most appealing. Combining the balloon experience with a bike trail would likely capture this group.

Women are more likely than other groups to find outdoor culinary experiences appealing including floating among vineyards in a hot air balloon, touring local farms, harvesting and foraging. They are also more interested than other groups in cooking and culinary tours.

Harvesting was also appealing to about one quarter of Gen X respondents. Again, though to a lesser degree, outdoor based experiences were most appealing to this group.

Most Appealing Culinary Experiences in California

Males are more interested in craft brewery tours compared with females. While generational differences exist there is less variation between income brackets. Gen Y travelers are more interested in beer related activities than those related to wine whereas for Matures, it is the reverse.

	TOTAL	Male	Female	Gen Y 18-29	Gen X 30-44	Baby Boomers 45-64	Matures 65+	<\$75K	\$75K+
TOTAL SAMPLE	2113	1042	1071	420	642	712	338	1420	621
Ethnic dining experiences	36%	35%	37%	35%	37%	37%	33%	35%	39%
Winery tasting room tours	34%	34%	34%	32%	29%	35%	42%	31%	40%
Wine and food festivals and events	30%	25%	35%	29%	32%	30%	26%	29%	32%
Local craft brewery tour	24%	30%	18%	30%	24%	23%	17%	23%	26%
Food truck experiences	22%	21%	24%	29%	30%	17%	11%	22%	23%
Float among the vineyards in a hot air balloon	22%	19%	24%	32%	21%	19%	15%	23%	19%
Farm-to-table dining experiences	20%	17%	24%	18%	22%	18%	24%	21%	18%
Wine tasting with the winemaker	19%	20%	19%	20%	15%	22%	20%	17%	25%
Harvesting experiences - handpicking your own fruits/nuts	19%	15%	23%	20%	22%	16%	17%	21%	15%
Chef's table dinners	18%	18%	17%	18%	21%	16%	15%	16%	22%
Guided culinary tours (e.g. artisan cheese makers)	15%	13%	18%	13%	16%	16%	14%	16%	13%
California restaurant month	14%	11%	16%	17%	13%	13%	13%	14%	13%
Cooking class with a celebrity chef	13%	10%	15%	17%	14%	10%	10%	13%	13%
Olive oil tasting/trail	11%	10%	12%	11%	10%	14%	8%	11%	11%
Pop-up restaurant dinners	11%	11%	11%	14%	14%	10%	3%	12%	10%
Bike tours through local wine trails	10%	9%	12%	21%	11%	6%	4%	10%	11%
Agri-tourism/local farm tours	9%	7%	11%	8%	12%	7%	8%	10%	7%
Foraging experiences - handpicking/gathering wild foods	5%	3%	6%	8%	6%	3%	3%	5%	4%
Other	1%	1%	1%	1%	1%	1%	2%	1%	1%
None of the above	4%	5%	2%	1%	3%	5%	7%	4%	3%

Statistically significant

CA1. If you were considering travel to California, which of these culinary experiences would you find most appealing (choose up to 5): [Base: All respondents: n=2113]

Culinary Experiences in California – Culinary Segments

Opportunistic culinary travelers, those who indicated that they sought out culinary activities but that these were not a key driver in their destination choice, were far more likely than the other culinary segments to say they find ethnic dining opportunities most appealing, nearly half said this versus just over a third of general leisure travelers 41% and 40% of Deliberate and Accidental Culinary travelers respectively.

Deliberate culinary travelers, those for whom culinary activities were a key driver of destination choice or helped them choose between destinations, were significantly more inclined to find local craft brewery tours and food truck experiences most appealing, 31% and 28% versus 24% and 22% among general leisure travelers. They were also the segment who most often indicated that chef's table dinners are most appealing, 29% versus 18% of general leisure travelers. For this group, wine tasting rooms and wine and food festivals were almost equally appealing – the narrowest gap among the segments, 38% and 37% whereas for Opportunistic culinary travelers winery tasting rooms received 44% and wine/food festivals received 38%.

Opportunistic culinary travelers indicated to a greater degree than other groups that farm to table dining would be most appealing to them (30%). Informing these travelers of such events once they reach the destination is encouraged.

Accidental culinary travelers were only slightly more likely than the general leisure travelers surveyed to say ethnic dining and winery tours were most appealing to them, 40% and 37% respectively. They were however most likely among the groups to say that ballooning over vineyards was most appealing, 29% of accidental culinary travelers said this compared with 23% of deliberates. Over a fifth of these travelers indicated that a wine tasting with the vintner would be most appealing, about the same as other culinary segments analyzed.

Most Appealing Culinary Experiences in California

Deliberates find local craft breweries, food trucks and chef’s table dinners more appealing than other segments. Opportunistics find ethnic dining, wine and food festivals, and farm-to-table experiences more appealing.

	TOTAL	Deliberate	Opportunistic	Accidentals
TOTAL SAMPLE	2113	483	428	305
Ethnic dining experiences	36%	41%	49%	40%
Winery tasting room tours	34%	38%	44%	37%
Wine and food festivals and events	30%	37%	38%	29%
Local craft brewery tour	24%	31%	27%	22%
Food truck experiences	22%	28%	27%	17%
Float among the vineyards in a hot air balloon	22%	23%	22%	29%
Farm-to-table dining experiences	20%	24%	30%	17%
Wine tasting with the winemaker	19%	21%	22%	22%
Harvesting experiences – handpicking fruits, etc.	19%	20%	22%	17%
Chef’s table dinners	18%	29%	20%	15%
Guided culinary tours (e.g. artisan cheese, etc.)	15%	20%	22%	15%
California restaurant month	14%	14%	14%	11%
Cooking class with a celebrity chef	13%	18%	14%	13%
Olive oil tasting/trail	11%	14%	12%	13%
Pop-up restaurant dinners	11%	14%	12%	12%
Bike tours through local wine trails	10%	10%	13%	11%
Agri-tourism/local farm tours	9%	15%	10%	6%
Foraging experiences - gathering wild foods	5%	5%	5%	7%
Other	1%	1%	0%	1%
None of the above	4%	0%		4%

Statistically significant

CA1. If you were considering travel to California, which of these culinary experiences would you find most appealing (choose up to 5): [Base: All respondents: n=2113]

Where the Culinary Activities Can Be Found in California

Respondents think that wineries in California are most likely to be found in the North Coast, Central Valley and San Francisco Bay Area. Interestingly wineries are slightly less well known in all regions than breweries with just under half the population surveyed saying they think there are wineries in the North Coast.

The highest degree of awareness is that of micro brewers in the Bay area, 53% followed by San Diego and Los Angeles, 45% and 44% respectively. Farm-to-table foods are thought to be found in the Central Valley most of all with 44% of respondents indicating awareness followed by Gold Country at 37% and Shasta Cascade at 34%. The Central Valley is also known for farm tours more than other regions, 37% say they think they can find this offering there. There is overwhelming lack of awareness of culinary offerings in the deserts. There are opportunities to increase awareness of culinary offerings especially in the southern and interior regions.

Regions in California	Wineries	Micro-Breweries	Farm-to-Table Food	Farm Tours	None
North Coast	49%	26%	28%	21%	26%
Central Valley	45%	26%	44%	37%	23%
San Francisco Bay Area	41%	53%	31%	13%	21%
Central Coast	38%	31%	30%	21%	30%
Shasta Cascade	37%	21%	34%	30%	30%
Gold Country	34%	22%	37%	27%	30%
San Diego	28%	45%	31%	16%	30%
Orange County	26%	37%	27%	14%	36%
Los Angeles	22%	44%	26%	10%	35%
Inland Empire	22%	24%	29%	23%	40%
High Sierra	22%	21%	24%	22%	44%
Deserts	8%	13%	10%	8%	70%



CA2. For each of the regions in this [map](#) of California put a check mark where you think you could find each culinary offering: [Base: All respondents: n=2113]

Where Can Wineries Be Found in California?

While the North Coast is seen as the top place to find wineries by nearly half of all respondents, some differences exist between subgroups. Those with income above \$75k and Opportunistic Culinary travelers are most likely to name indicate the North Coast would have wines.

Compared with males, females are more likely to think wineries can be found in Gold Country and San Diego. Younger generations think that they can be found in Central Valley, Shasta Cascade and Gold Country and the High Sierra at a higher rate than older generations.

	Total	Male	Female	Gen Y 18-29	Gen X 30-44	Baby Boomers 45-64	Matures 65+	<\$75K	\$75K+	Deliberate	Opportunistic	Accidentals
North Coast	49%	48%	50%	49%	51%	51%	45%	46%	59%	54%	63%	53%
Central Valley	45%	43%	48%	49%	52%	39%	40%	46%	47%	53%	55%	41%
San Francisco Bay Area	41%	41%	41%	40%	43%	39%	44%	37%	51%	45%	49%	45%
Central Coast	38%	38%	39%	38%	40%	39%	35%	35%	46%	44%	51%	38%
Shasta Cascade	37%	36%	38%	42%	40%	34%	31%	37%	40%	45%	47%	39%
Gold Country	34%	31%	38%	40%	37%	34%	26%	34%	36%	39%	44%	32%
San Diego	28%	24%	31%	28%	28%	28%	25%	28%	27%	30%	33%	24%
Orange County	26%	23%	28%	28%	26%	23%	28%	26%	25%	29%	28%	30%
Los Angeles	22%	22%	23%	24%	21%	24%	20%	22%	23%	27%	23%	24%
Inland Empire	22%	22%	22%	22%	25%	21%	21%	22%	24%	28%	25%	21%
High Sierra	22%	19%	24%	25%	28%	19%	11%	22%	21%	26%	27%	20%
Deserts	8%	8%	7%	11%	10%	5%	4%	8%	7%	11%	9%	5%

Statistically significant

CA2. For each of the regions in this [map](#) of California put a check mark where you think you could find each culinary offering: [Base: All respondents: n=2113]

Where Can Micro-Breweries Be Found in California?

The larger metropolitan areas of San Francisco, San Diego and Los Angeles are thought to be where visitors would find micro-breweries with nearly half of all groups indicating these three destinations. Women were slightly less aware than men of that breweries could be found in these regions. Younger generations may be more familiar with micro-breweries and are therefore more likely to find them in other regions, such as Shasta Cascade and the High Sierra. It is noteworthy that high levels of awareness appear to be among those of higher income.

	Total	Male	Female	Gen Y 18-29	Gen X 30-44	Baby Boomers 45-64	Matures 65+	<\$75K	\$75K+	Deliberate	Opportunistic	Accidentals
San Francisco Bay Area	53%	55%	50%	54%	51%	56%	47%	51%	57%	58%	65%	57%
San Diego	45%	48%	41%	44%	45%	46%	43%	42%	52%	52%	55%	44%
Los Angeles	44%	46%	43%	43%	43%	48%	40%	42%	50%	48%	52%	49%
Orange County	37%	40%	35%	34%	38%	41%	32%	35%	44%	43%	45%	39%
Central Coast	31%	33%	29%	33%	33%	29%	28%	29%	35%	36%	37%	37%
North Coast	26%	27%	26%	32%	29%	22%	25%	26%	28%	34%	32%	29%
Central Valley	26%	25%	26%	30%	26%	24%	23%	24%	29%	31%	34%	26%
Inland Empire	24%	27%	21%	22%	28%	24%	20%	22%	29%	31%	32%	26%
Gold Country	22%	22%	23%	23%	25%	19%	23%	21%	28%	27%	29%	25%
Shasta Cascade	21%	23%	19%	26%	23%	18%	17%	20%	24%	27%	27%	24%
High Sierra	21%	21%	20%	25%	25%	16%	15%	19%	24%	26%	25%	20%
Deserts	13%	13%	14%	15%	16%	12%	8%	15%	10%	19%	18%	13%

Statistically significant

CA2. For each of the regions in this map of California put a check mark where you think you could find each culinary offering: [Base: All respondents: n=2113]

Where Can the Farm-to-Table Food Be Found in California?

The Central Valley, Gold Country and Shasta Cascade are where potential visitors think that they would find farm-to-table offerings. Interestingly, respondents associated farm-to-table with areas where there are more likely to be farms, and not with the larger cities where these offerings exist at local restaurants. This suggests that these visitors see farm to table dining as more than a meal, they see it as an experience. Consider pairing these offerings with local accommodation such as B&Bs and farm tours where possible.

	Total	Male	Female	Gen Y 18-29	Gen X 30-44	Baby Boomers 45-64	Matures 65+	<\$75K	\$75K+	Deliberate	Opportunistic	Accidentals
Central Valley	44%	43%	45%	42%	41%	46%	46%	42%	50%	49%	52%	49%
Gold Country	37%	35%	38%	34%	37%	42%	30%	37%	38%	42%	42%	41%
Shasta Cascade	34%	33%	36%	36%	37%	35%	25%	34%	36%	43%	40%	36%
San Francisco Bay Area	31%	29%	34%	32%	35%	30%	25%	31%	32%	37%	38%	33%
San Diego	31%	29%	32%	27%	34%	31%	29%	30%	32%	37%	35%	33%
Central Coast	30%	30%	31%	28%	30%	33%	29%	28%	35%	39%	37%	27%
Inland Empire	29%	28%	30%	26%	26%	33%	29%	28%	31%	33%	35%	28%
North Coast	28%	26%	29%	30%	31%	26%	22%	27%	31%	35%	34%	31%
Orange County	27%	24%	30%	25%	27%	29%	25%	26%	27%	35%	30%	30%
Los Angeles	26%	26%	27%	28%	29%	25%	23%	27%	24%	31%	30%	29%
High Sierra	24%	23%	25%	22%	28%	26%	17%	24%	24%	30%	24%	23%
Deserts	10%	10%	10%	8%	11%	11%	11%	10%	10%	13%	12%	10%

Statistically significant

CA2. For each of the regions in this map of California put a check mark where you think you could find each culinary offering: [Base: All respondents: n=2113]

Where Can Farm Tours Be Found in California

Potential visitors to California feel that the same regions offer farm tours as farm-to-table foods. This makes more sense since these are the regions where the larger farms may exist. It may or may not be the case that this is where the farm tours actually are since smaller farms may be more likely to be offering farm tours to supplement income from visitors.

	Total	Male	Female	Gen Y 18-29	Gen X 30-44	Baby Boomers 45-64	Matures 65+	<\$75K	\$75K+	Deliberate	Opportunistic	Accidentals
Central Valley	37%	36%	39%	35%	36%	40%	38%	36%	40%	39%	47%	43%
Shasta Cascade	30%	28%	31%	36%	35%	28%	15%	30%	30%	31%	40%	28%
Gold Country	27%	26%	27%	28%	29%	26%	24%	26%	28%	31%	36%	28%
Inland Empire	23%	21%	25%	19%	25%	24%	21%	22%	24%	26%	28%	28%
High Sierra	22%	18%	25%	22%	23%	24%	13%	22%	21%	23%	25%	24%
North Coast	21%	18%	23%	25%	25%	18%	14%	21%	21%	26%	28%	23%
Central Coast	21%	22%	20%	20%	20%	22%	20%	20%	21%	26%	26%	20%
San Diego	16%	15%	18%	15%	19%	16%	14%	16%	18%	20%	21%	17%
Orange County	14%	13%	15%	12%	17%	16%	10%	14%	15%	18%	17%	15%
San Francisco Bay Area	13%	13%	12%	17%	13%	11%	9%	12%	14%	19%	14%	10%
Los Angeles	10%	10%	11%	10%	12%	11%	8%	10%	11%	14%	12%	11%
Deserts	8%	7%	8%	7%	9%	9%	5%	8%	7%	9%	8%	8%

Statistically significant

CA2. For each of the regions in this [map](#) of California put a check mark where you think you could find each culinary offering: [Base: All respondents: n=2113]

Culinary Products And Activities Associated With California

California is strongly associated with wineries, with three-quarters (75%) making this connection. Those earning more than \$75,000 per year are significantly more likely to associate wineries with California than are those who earn less than \$75,000 per year. Interestingly, it's the Opportunistics who are more likely to associate wineries and farmers' markets with California than the Deliberate culinary travelers.

	TOTAL	MALE	FEMALE	Gen Y 18-29	Gen X 30-44	Boomers 45-64	Matures 65+	<\$75K	\$75K+	Deliberate	Opportunistic	Accidental
Sample	2113	1042	1071	420	642	712	338	1420	621	483	428	305
Wineries	75%	73%	78%	77%	71%	78%	74%	73%	81%	76%	86%	81%
Fine Dining	48%	45%	51%	46%	50%	50%	41%	45%	55%	55%	62%	52%
Local Cuisine	40%	38%	42%	39%	44%	38%	40%	39%	44%	50%	53%	40%
Farmers Markets	37%	33%	41%	42%	39%	35%	33%	37%	38%	41%	52%	39%
Breweries	21%	19%	22%	25%	22%	20%	14%	20%	22%	27%	24%	22%
Not sure	14%	16%	12%	13%	15%	14%	14%	15%	12%	9%	7%	6%

Statistically significant

Q22 Please indicate which of the following culinary products and activities you associate with each of the states listed below: California *Base: All respondents: n=2113*



Mandala Research, LLC

Insights • Strategy • Results

Culinary Products And Activities For States Surrounding California

California is most noted for its' wineries and fine dining opportunities. Arizona competes the most for local cuisine, while Oregon competes the most for wineries and farmers' markets. Oregon and California are equally associated with breweries.

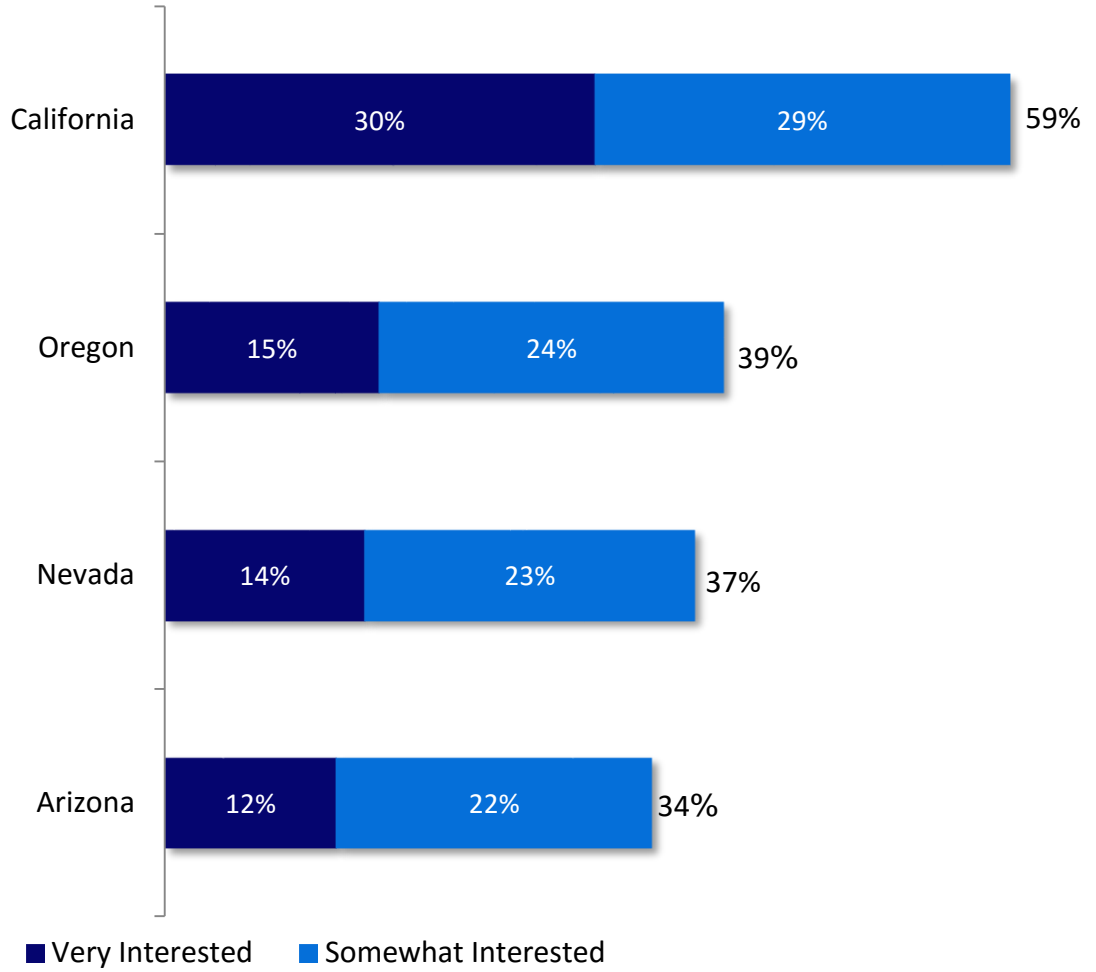
Top 2 Very and Somewhat Interested	Local Cuisine	Wineries	Fine Dining	Breweries	Farmers Markets	Not sure
California	40%	75%	48%	21%	37%	14%
Arizona	33%	5%	13%	6%	9%	56%
Nevada	17%	4%	31%	7%	4%	53%
Oregon	26%	23%	12%	21%	25%	46%

Statistically significant



Interest In A Culinary Trip To Each State – Top 2 Box

When asked if they had an interest in taking a culinary trip to the following states, almost three in five travelers , 59%, said they are interested in taking a culinary trip to California. Over a third of travelers, 39%, said they would be interested to take a culinary trip to Oregon.



Q23. How interested are you in taking a CULINARY trip to the following destinations within the next year?
[Base: All respondents: n=2113]

Interest In A Culinary Trip To Each State By Travel Segment – Top 2 Box

While across the board respondents in each segment are most interested in a culinary trip to California there are some significant differences between the groups. Matures are significantly less interested in a culinary trip to California. Gen Y and Gen X are significantly more likely than their older peers to be interested in a culinary trip to Oregon.

Top 2 Very and Somewhat Interested	TOTAL	MALE	FEMALE	Gen Y 18-29	Gen X 30-44	Boomers 45-64	Matures 65+	<\$75K	\$75K+	Deliberate	Opportunistic	Accidental
TOTAL	2113	1042	1071	420	642	712	338	1420	621	483	428	305
California	58%	57%	60%	67%	66%	55%	40%	57%	61%	83%	73%	53%
Oregon	39%	40%	38%	46%	46%	35%	26%	38%	42%	65%	50%	30%
Nevada	36%	38%	35%	38%	42%	38%	19%	37%	34%	57%	43%	31%
Arizona	34%	34%	33%	37%	37%	32%	26%	34%	32%	55%	42%	28%

Statistically significant

Q23. How interested are you in taking a CULINARY trip to the following destinations within the next year?