

Below is a summary by the Arizona Office of Tourism of The American Culinary Traveler 2013 report released August 2013 by Mandala Research, LLC, and purchased by Northern Arizona University.

Objective of research: to identify the characteristics, trends, popular destinations, and marketing strategies for the “culinary traveler” (a leisure traveler seeking out culinary experiences).

Methodology: 2,113 web interviews between May 2 and May 10, 2013 (U.S. leisure travelers)

- Average age – 44 years old
- 93% some college or above
- 82% White/Caucasian
- 49% male, 51% female

Key Findings:

Categories of Culinary Travelers		
Deliberates	1+ trips per year where the availability of culinary activities was a key reason for the trip.	30%
Opportunists	1+ trips per year where the availability of culinary opportunities were sought out, but were not a factor in choosing the destination.	26%
Accidentals	1+ trips per year where the traveler participated in culinary activities simply because they were available.	19%
Total	Percentage of the 170 millions leisure travelers who are culinary leisure travelers:	77%

- Leisure travelers represent 71% of the U.S. adult population.
 - While 77% of all leisure travelers can be classified as Culinary travelers (detailed above) and 51% enjoy unique and memorable dining experiences, only about 38% have heard the term “Culinary traveler.”
- Examples of Culinary activities:
 - Facility tour (examples: brewery or winery).
 - Attending a cooking school or class.
 - Shopping at a local/unique food/drink store or farmers market.
 - Attending a food/drink festival.
 - Staying at a Bed and Breakfast or other location that emphasizes their food experience.

Characteristics of the Culinary Traveler:

- Trips per year: 4 domestic leisure, 2 domestic business, 1 international.
- Income is not related to interest in taking a culinary trip.
- Gen Y and Gen X are more interested in culinary travel than Baby Boomers and Matures.
- Travel an average distance of 933 miles.
 - Top origin states of culinary travelers: 1-California (9%), 2- Texas (8%), 3- New York (8%), 4- Florida (7%), 5- Illinois (5%). Arizona ranks 8th with 3% of Culinary travelers originating from the state.
- Most travel with a spouse/significant other; 20% with friends, 15% with family and/or children.

- Approximately 47% fly while 50% drive their own personal vehicle.
- Culinary travelers stay an average of four nights away from home.
 - 63% stay at a lodging facility (hotel, resort, etc.)
 - 68% of these travelers are Gen X and Baby Boomers
 - 32% stay with friends and relatives
 - 41% are Gen Y.
 - Ensuring that local family and friends are aware of and can recommend culinary activities is one way to capture this third of the culinary traveler market.
- Culinary travelers spend more per trip compared to \$1,200 for all leisure travelers.

Spending by Age Group					
Expense	<i>Culinary Total</i>	Gen Y (18-29)	Gen X (30-44)	Baby Boomers (45-64)	Matures (65+)
Culinary	\$296	\$239	\$307*	\$297*	\$345*
Entertainment	\$153	\$142	\$161*	\$155*	\$146
Lodging	\$359	\$257	\$331	\$402*	\$456*
Shopping	\$128	\$109	\$141*	\$113	\$158*
Transportation	\$386	\$323	\$351	\$425*	\$456*
Total	\$1,322	\$1,070	\$1,291	\$1,392*	\$1,561*

*indicated higher than the culinary total.

- Culinary travelers bring spending to all aspects of tourism. Bundling cultural experiences with dining can be an effective marketing approach.
- Seek out: unique foods and atmosphere, gourmet foods, farmers markets, wine, and beer.
- Two main methods of information gathering: online and recommendations.

Destinations:

Top 5 U.S. Destinations by Category				
Rank	Top of Mind	Participation in Culinary Activities	Participation in Wine-Related Activities	Participation in Beer-Related Activities
1	New York City, NY	New York City, NY	San Francisco, CA	Portland, OR
2	New Orleans, LA	Las Vegas, NV	New York City, NY	Boston, MA
3	San Francisco, CA	San Francisco, CA	Boston, MA	Denver, CO
4	Chicago, IL	New Orleans, LA	Los Angeles, CA	New York City, NY
5	Napa Valley, CA	Chicago, IL	Orlando, FL	Chicago, IL

- Although an Arizona city did not rank as a ‘top of mind’ destination by the 1,618 survey participants, Phoenix/Scottsdale ranked #10 (6% of those surveyed) for cities in which survey participants had *actually* visited. So, while travelers don’t associate the Phoenix area with culinary travel, there is a market for it.

- A segment of culinary travel is wine-related and beer-related activities. For wine-related activities Phoenix/Scottsdale ranked 17th (4% of those surveyed). For beer-related activities Phoenix/Scottsdale ranked 13th (also 4% of those surveyed).
 - Beer-related activities are particularly popular among Gen Y and Gen X.
 - Marketers can cross-sell wineries and breweries to attract couples, younger generations, and affluent culinary travelers. For older generations, marketing should focus on wine-related experiences.

Culinary Traveler Activities				
Culinary activities that motivate travel	Beer festival (54%)	Wine trail (53%)	Wine festival (50%)	Food festival (42%)
Other activities engaged in during stay	Visit historic sites, scenic drives, shopping, museums, etc.			

Media influences of Culinary Travelers:

- 4/10 read daily newspaper.
- 3/10 read weekend newspaper.
- 28% read travel magazines.
- 27% read travel section in newspaper.
- Top publications for food and drink: Bon Appétit, Cooking Light, and Food and Wine. (Note: There is little difference between culinary travelers and leisure travelers overall in terms of reading these publications.)
- Websites used to plan travel arrangements (top 5):
 - Expedia, Travelocity, Orbitz, Google, and Southwest Airlines
- Websites used to book travel arrangements (top 2):
 - Expedia (42%) & Southwest Airlines (34%)
- Social media sites used on a regular basis:
 - Facebook (67%), YouTube (32%), LinkedIn (23%), Google + (21%), and Pinterest (17%).
- Mobile devices are growing in use for information gathering (top 5):
 - Directions, dining, events, attractions, and deals.

Top factors when selecting a destination:

1. General cost of area
2. Low prices/discounts
3. Convenience
4. Unique atmosphere
5. Unique food/drink
6. Having friends/relatives who know the area

Implications/Recommendations:

1. Culinary travel is a growing niche market.
2. Travelers are looking for local and authentic foods and experiences.
3. Food activities can be packaged with other activities and events.
4. Food choices don't have to be fancy – a food truck offering unique fare can be more appealing than a gourmet restaurant.
5. Use social media to expose local offerings, increase word of mouth.
6. Festivals are a great way to bring communities together and culinary travelers to you.
7. Messages that target authentic, local, and budget themes will resonate strongly with culinary travelers.