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Trading Travellers – International Travel Trends¹

by Warren Clark

Warren Clark is an analyst with Canadian Social Trends.

Canadians travel outside Canada for many different reasons. They want to escape the daily routine and pressures of life, recharge batteries and put day-to-day living back in perspective. Canadians want to relax, experience different cultures, expand their horizons, spend time with distant friends, explore and find adventure. For some people, business, employment, education or attending a convention is the motivation for travelling beyond our borders.

Although Canadians take most trips within Canada, travel expenditures of Canadians are split almost equally between domestic and international travel. The United States remains the primary international destination of Canadians while Americans are the most numerous international travellers to Canada. However, economic conditions in Canada have led to dramatic changes in travel patterns to the United States over the last decade. Increased Canadian travel to the United States in the early 1990s resulted in rapid growth in travel expenditures outside Canada that was not counterbalanced by visitors to Canada. Meanwhile, travel to and from overseas countries has grown steadily over the last decade except when the Gulf War of the early 1990s briefly interrupted growth.

In 1994 (the most recent year for which domestic travel data are available), Canadians took 152 million trips of 80 kilometres or more in Canada, 54 million trips to the United States and 3.4 million trips to other countries. While on these trips, they spent \$33 billion, representing the equivalent of 4.5% of Gross Domestic Product or \$1,137 for every man, woman and child in Canada.

¹ This article appeared in *Canadian Social Trends*, Number 45, Summer 1997. It was updated to reflect the 1996 International Travel Survey data that were recently released.



In This Issue...

Feature Article

Trading Travellers – International Travel Trends 1

Trends

International Travel Account 7

Travel Price Index 8

National Tourism Indicators 9

Travel Indicators 10

Older Canadians are more likely to travel than younger Canadians

In 1996, adults aged 55 to 64 were the most likely to travel outside Canada. This is not surprising since on average, older Canadians have higher household discretionary income per capita, fewer financial commitments and more leisure time². A favourite destination for older Canadians is the southern United States where they stay longer and spend more per visit than younger Canadians. Those over age 65 travel less often than 55- to 64-year-olds, possibly because of health concerns and mobility problems. As well 55- to 64-year-olds were three times more likely to travel internationally than those aged 20 to 24.

Over the last decade, economic conditions affected travel of both young and old Canadians alike. However, the gap in the number of trips per 100 residents has widened between younger adults (aged 20 to 44) and older adults (aged 45 and over). The gap widened for both overseas travel and travel to the United States. Differential earnings growth for younger and older adults may partially explain the widening gap. For example,

real earnings of young men have fallen since the late 1970s while those of older men have increased³. Consequently, international travel has become less attractive to young adults and more affordable for older adults over the last decade.

The United States: our favourite destination

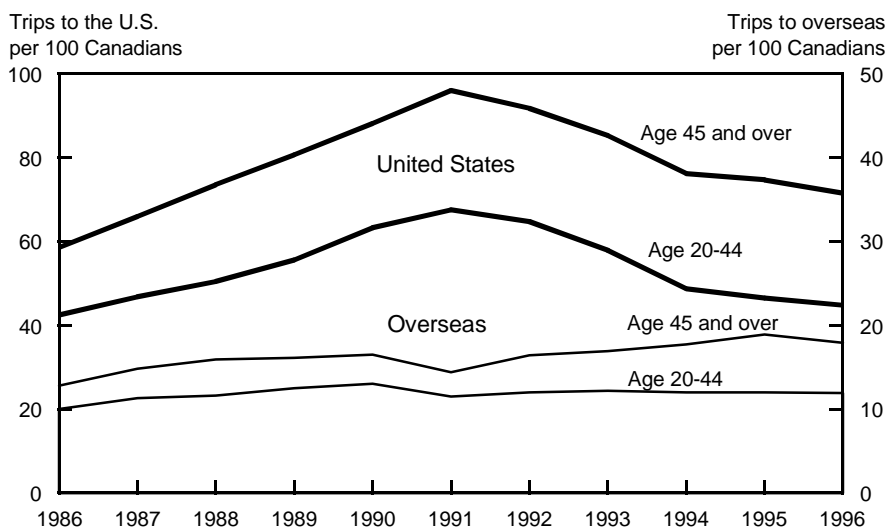
In 1995, Canadians were the largest group of international travellers to the United States, making one third of all foreign trips of one or more nights to that country⁴. Although the number of overnight trips Canadians made to the United States remained relatively constant between the early 1970s and 1986, the number of trips has fluctuated with the economic

² Donna J. Owens, "Tracking Down Discretionary Income", *Perspectives on Labour and Income*, Spring 1991, Statistics Canada, Catalogue no. 75-001-XPE.

³ Garnett Picot and John Myles, "Children in Low-income Families", *Canadian Social Trends*, Autumn 1996, Statistics Canada, Catalogue no. 11-008-XPE.

⁴ Tourism Industries, International Trade Administration.

Differences in Canadian travel habits growing between young and older adults, 1996



Source: Statistics Canada, International Travel Survey



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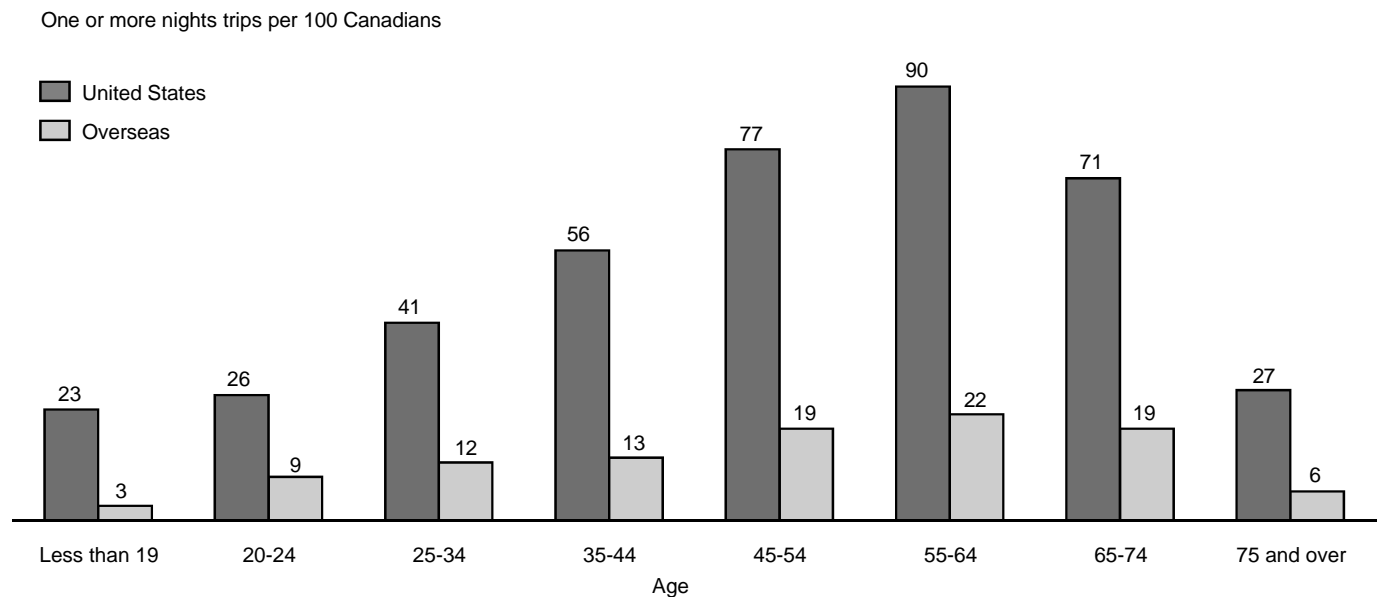


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Note of appreciation

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55- to 64-year-olds more likely to travel abroad than other age groups, 1996



Source: Statistics Canada, International Travel Survey

conditions in Canada since then. In 1986, the Canadian dollar hit a new low compared with the U.S. dollar—US\$0.72. The value of the Canadian dollar then climbed to US\$0.87 in 1991 which made travel to the United States increasingly affordable for Canadians. In 1991, Canadian travel to the United States peaked at 19.1 million trips of one or more nights.

By 1996, however, Canadian travel to the United States plummeted to 15.3 million trips of one or more nights. Many events influenced this decline. That same year, the Canadian dollar dropped back to US\$0.73. The unemployment rate remained high and real family income stagnated. During the early 1990s, several provincial governments limited the amounts paid for health care services to Canadians while outside Canada, thus dramatically increasing the cost of supplementary health insurance. Furthermore, the domestic tourism industry initiated advertising campaigns to promote Canadian tourism products and experiences, including adventure travel,

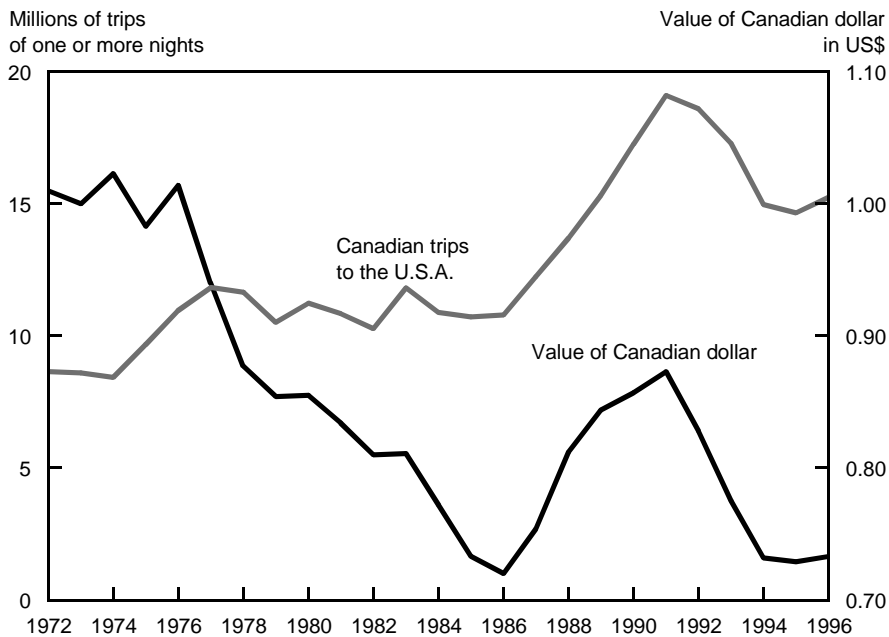
Favourite destinations of Canadians, 1996

	Stays of one or more nights	Number of nights	Average nights per stay	Money spent on travel ¹
	000s	000s		\$ millions
United States (Trips)	15,301	108,673	7.1	9,085
Border states	12,478	34,416	2.8	2,651
Mid-range states	4,234	13,840	3.3	1,424
Southern states	4,797	60,142	12.5	3,952
Total overseas (Trips)	3,672	69,345	18.9	5,104
Europe	2,602	31,130	12.0	2,431
France	424	4,843	11.4	438
Germany	236	2,519	10.7	184
Italy	183	2,099	11.5	210
Netherlands	177	1,446	8.2	92
Switzerland	123	966	7.8	83
United Kingdom	737	10,037	13.6	758
Asia	727	13,101	18.0	982
Hong Kong	157	3,657	23.3	181
Japan	63	1,177	18.7	117
Caribbean	720	7,148	9.9	662
Cuba	222	2,192	9.9	167
Dominican Republic	112	1,027	9.2	77
Mexico	438	4,682	10.7	366
Australia	76	2,842	37.4	173

1. Includes money spent on same day stays and stays of one or more nights. Excludes international transportation fares.

Source: Statistics Canada, International Travel Survey

Since 1986, Canadian trips to the United States have fluctuated with the value of the Canadian dollar



Sources: Statistics Canada, International Travel Survey; Bank of Canada

parks, festivals, events and cultural experiences, that Canadians could substitute for similar American ones.

Cross-border shopping down

Same-day car trips to the United States are often used as an indicator of cross-border shopping. These trips peaked at 59 million in 1991. Following that peak, the relative value of the Canadian dollar declined considerably against the American dollar. In addition, the introduction of the Free Trade Agreement and later, of the North American Free Trade Agreement progressively lowered import duties on American goods. Consequently, Canadians made fewer same-day trips to the United States in 1996 (36 million) than in the early 1990s.

Florida, Canada's winter home away from home

Florida is the main sun destination for eastern Canadians, while California, Nevada and Hawaii are most popular among western Canadians. During 1996, Canadian visits to Florida represented

32% of all nights that Canadians spent in the United States and 24% of all Canadian expenditures on travel in the United States.

Widely publicized violent crimes against foreign tourists in recent years affected travel to Canada's most popular winter getaway. Public perception of crime in Florida appears to have contributed to a 30% drop in visits to Florida between 1992 and 1995. Some Canadians may have substituted visits to other southern vacation spots, particularly Cuba and Mexico, helped by the devaluation of the Mexican peso and the low Canadian dollar relative to the U.S. dollar. Others may simply have stayed at home. In 1996 however, these visits were up 11% compared to 1995.

Canadians stay longer and spend more per visit in the southern states than any other region of the United States. In 1996, Canadians made 4.8 million states-visits of one or more nights to the southern states, down from 5.5 million in 1992. On average, in 1996, Canadian overnight visitors to southern states stayed 12.5 nights and spent \$820 per visit.

Border state travel declines

Travellers to the border states, due to proximity, are more likely than southern state travellers to make a quick trip to visit friends and relatives or go shopping. Compared with southern state travellers, though, border state travellers stayed for much shorter periods in 1996 (2.8 nights on average) and spent much less per visit. At the peak of Canadian travel to the United States in 1991, Canadians made a total of 18.7 million overnight visits to border states⁵. During the visits, they spent \$3.3 billion, almost as much as was spent in the southern states. Between 1991 and 1996, the number of overnight states-visits to border states declined by 33%.

Canadian business travel up

Most Canadians travel to the United States on holiday or pleasure trips. While holidays to the United States doubled between 1986 and 1991, they decreased steadily from 1991 to 1995 but were up 6% in 1996. Those Canadians who did travel to the United States in 1996 stayed longer: an average of 8.8 nights in 1995, up from 8.7 nights in 1991.

During this period, the North American Free Trade Agreement expanded ties between Canadian and American businesses. The "Open Skies" agreement and the gradual expansion of Canada-U.S. air routes made business travel to the United States easier and less expensive. After a slow but steady growth from 1986 to 1995, the number of Canadians travelling on business to the United States was up 7% in 1996 compared to 1995. Canadian travellers on business to the United States spent more per trip than did other U.S.-bound Canadian travellers, spending \$740 on trips averaging four nights.

⁵ Border states: Maine, New Hampshire, Vermont, Massachusetts Rhode Island, Connecticut, New York, New Jersey, Pennsylvania, Ohio, Michigan, Wisconsin, Minnesota, North Dakota, Montana, Idaho, Washington, Oregon.

Southern States: Florida, Georgia, South Carolina, Alabama, Mississippi, Arkansas, Louisiana, Texas, Arizona, New Mexico, California, Hawaii.

Mid-range states: District of Columbia, North Carolina, Virginia, Illinois, Indiana, Iowa, Kansas, Missouri, Nebraska, South Dakota, Kentucky, Tennessee, Colorado, Nevada, Utah, Wyoming, Alaska, Maryland, Delaware, West Virginia, Oklahoma.

Overnight travel to the United States to visit friends and relatives has remained stable since 1986. These trips, averaging \$240 in 1996, were less expensive than others for mainly two reasons: inexpensive transportation (by car) and accommodation (with friends or relatives).

Other reasons for overnight travel, particularly shopping in the United States, showed the greatest fluctuations in overnight trips between 1986 and 1996. In 1991, when the Canadian dollar reached its peak, Canadians made 1.3 million overnight trips, primarily to shop. By 1996, overnight shopping trips to the United States had dropped to 0.3 million.

Little change in American travel to Canada

Although the 16% devaluation of the Canadian dollar against the American dollar since 1991 has made travel to Canada increasingly attractive, American travel to Canada has not varied much over the last decade. In 1995 and 1996, travel from the United States reached 13 million overnight trips, the highest volumes since 1986 when Vancouver was host to Expo 86. This volume was only 9% above that of 1992, the low point of the last decade.

Americans visiting Canada spent far less and stayed shorter periods than Canadian visitors to the U.S. In 1996, per 100 residents, Americans made five overnight trips to Canada while Canadians made 51 overnight trips to the United States. While the United States attracts Canadian travellers year-round, Americans view Canada mostly as a spring and summer destination.

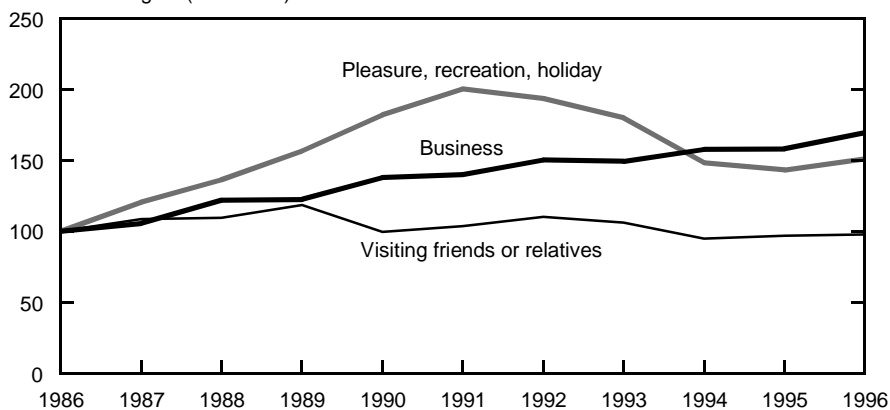
Canadian overseas travel continued to grow

In 1996, Canadians made 3.7 million overnight trips to overseas countries, a 61% increase from 1986. While on these trips, they stayed on average, 18.9 nights outside the country and spent approximately \$1,400. Their total spending of \$5.1 billion represented 56% of what Canadians spent on travel to the United States.

Among European countries, the United Kingdom and France remained the

Business travel to the United States continued to grow, 1996

Index of growth in trips of one or more nights (1986=100)



Source: Statistics Canada, International Travel Survey

International visitors to Canada, 1996

	Trips of one or more nights	Nights	Average nights per visit	Money spent in Canada by travellers from other countries ¹
	000s	000s		\$ millions
United States	12,909	49,796	3.9	6,258
Border states	9,016	31,148	3.4	4,008
Mid-range states	2,033	8,796	4.3	1,024
Southern states	1,859	9,852	5.3	1,226
Total overseas	4,377	46,889	10.7	4,538
Europe	2,288	27,107	11.8	2,330
France ²	460	5,558	12.1	499
Germany	447	5,250	11.7	510
Italy	106	1,142	10.7	98
Netherlands	114	1,531	13.5	99
Switzerland	107	1,360	12.7	133
United Kingdom	691	7,700	11.1	643
Asia	1,511	12,809	8.5	1,585
Hong Kong	199	1,846	9.3	186
Japan	648	3,835	5.9	695
South Korea	159	1,060	6.7	183
Taiwan	132	2,052	15.6	175
South America	126	1,442	11.4	157
Australia	149	1,637	11.0	148

¹ Includes money spent on same day trips and trips of one or more nights. Excludes international transportation fares.

² Includes Andorre and Monaco.

Source: Statistics Canada, International Travel Survey

most popular overseas destinations for Canadians in 1996 and the number of visits to these countries increased by 36% since 1986. In comparison, Canadian

trips that included a visit to an Asian country, to Cuba and to Mexico increased by 136% during the same period. While travel to the United Kingdom and France

was primarily during trips for holidays or to visit friends or relatives, travel to Japan and Hong Kong was more business-oriented.

Greater cultural ties with Asian countries may have contributed to increased Canadian travel to Asia. In recent years, more than half of immigrants and about half of international students entering Canada came from Asia. The Canadian and Japanese governments are now working together to increase the number of visitors travelling between the two countries.

In comparison, overseas travellers made 4.4 million overnight trips to Canada—an all-time high in 1996, spending \$4.5 billion. On average, these travellers stayed 10.7 nights and spent \$1,030 per trip.

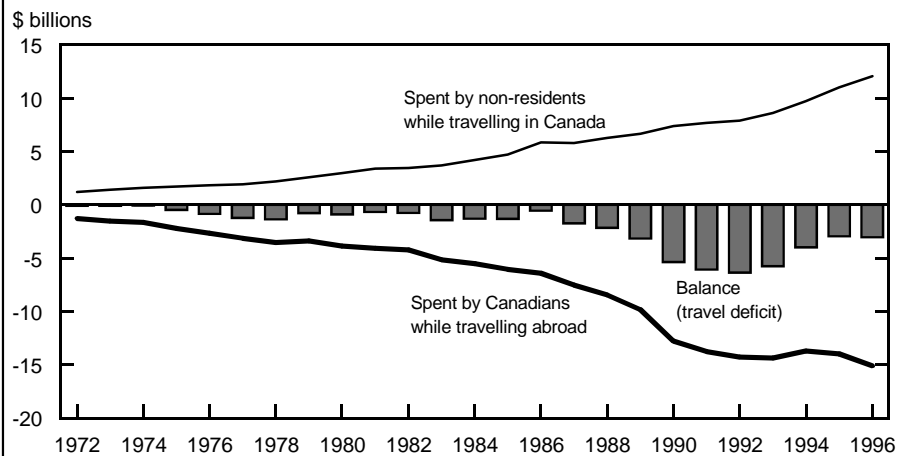
International Travel Survey

Methodology

All ports of entry across Canada participate in determining the number of travellers crossing the border into Canada, by category and type of transportation. A census of international travellers entering Canada is taken at all but seven ports of entry (where samples are used to estimate automobile and cycle traffic).

Statistics Canada obtains information about expenditures and characteristics of international travellers from questionnaires handed out by Canada Customs officials at all ports of entry to Canada. Five questionnaires are used to survey different categories of international travellers: travellers from the United States visiting Canada, residents of countries other than the United States visiting Canada, Canadian residents returning from trips abroad, Canadian residents leaving and returning to Canada by auto on the same day, and United States residents visiting Canada by auto on the same day. Questionnaire return rates for these five categories of international travellers varied between 4% and 11% in 1996.

Canadians spend more on travel outside Canada than non-residents do in Canada



Source: Statistics Canada, International Travel Survey

\$3 billion travel deficit in 1996

When Canadians spend more money travelling outside the country than do travellers visiting Canada, a travel deficit⁶ between Canada and other countries results. Canada has had one almost every year since 1951. Before 1986, the Canadian travel deficit increased slowly. With increased Canadian travel to the United States, the travel deficit ballooned to about \$6.4 billion in 1992. Most of that deficit was with the United States (\$5.9 billion). The decline in Canadian travel to the United States between 1991 and 1996 reduced the travel deficit to \$3 billion in 1996.

Getting to know Canada better

A weak Canadian dollar has made Canada an increasingly attractive destination to

foreign travellers; it has also made travel outside the country less affordable for Canadians. Although, trips of non-U.S. residents to Canada increased by half between 1992 and 1996, American travel to Canada has remained flat over the last decade. For many American travellers, Canada remains a short-stay destination. Meanwhile, the warmth of the southern states and other sun spots still attracts Canadians during the winter months for long stays. The challenge to the Canadian tourism industry is to make travel in Canada more attractive to Canadians and non-residents alike and to spread travel into the off-peak season.

⁶ Travel receipts and payments include spending on travel and incidentals to travel such as spending on lodging, food, entertainment, local transportation, gifts, medical care, student expenses and other purchases of personal goods and services, and crew spending.



International Travel Account Second Quarter 1997 (preliminary)

Canada's international travel account balance improved in the second quarter of 1997, although it remained in a deficit position.

International travel account deficit down

Foreign visitors injected almost \$3.1 billion into the Canadian economy in the second quarter of 1997, practically unchanged from the previous quarter. Meanwhile, the \$3.8 billion Canadian travellers spent abroad between April and June was 1.4% lower than the first quarter.

Note to readers

Unless otherwise stated, quarterly data used in this release are seasonally adjusted. Amounts are in Canadian dollars and are not adjusted for inflation. Receipts represent spending by foreigners travelling in Canada, including education-related and medical-related spending. Payments represent spending by Canadians travelling abroad, including education-related and medical-related spending. Spending by business travellers and transportation crew members are part of the business sector, while spending by other travellers and education-related and medical-related spending are part of the personal sector.

Consequently, the international travel account deficit dropped 8.5%, from \$761 million in the first quarter to \$696 million in the second. This deficit peaked at \$1.9 billion during the last quarter of 1991.

Americans spent more in Canada, Canadians spent less in the United States

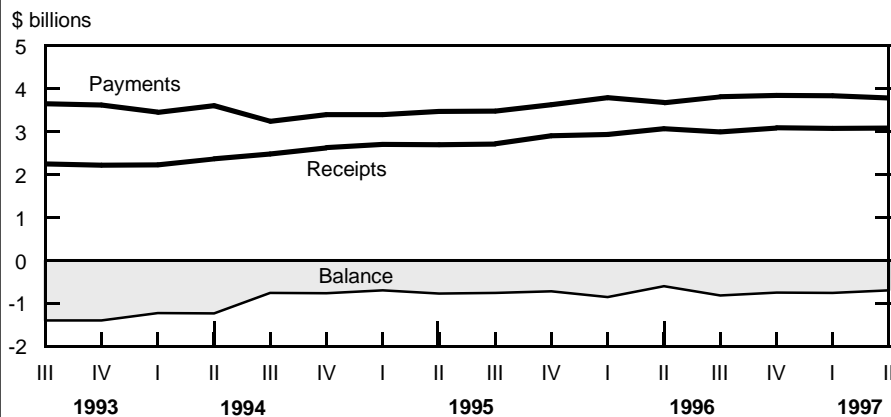
Americans spent \$1.7 billion while travelling in Canada in the second quarter, a record 2.6% more than during the previous

quarter. Meanwhile, Canadians spent \$2.5 billion in the United States, practically unchanged from each of the previous two quarters. In the fourth quarter of 1991, Canadians spent a record \$2.8 billion south of the border. In 1991, the Canadian dollar was worth US\$0.87 and the number of same-day trips to the United States, often used as an indicator of cross-border shopping, also peaked. The travel account deficit with the United States, the difference between receipts and payments — reached \$770 million for the second quarter, 6.9% less than in the first quarter.

Eighth consecutive surplus in the travel account with countries other than the United States

In the second quarter of 1997, the travel account with countries other than the United States showed a surplus (\$74 million) for an eighth consecutive quarter, increasing 12.1% over the first quarter. Many European currencies have recently lost value compared with the Canadian dollar. Overseas residents travelled less to Canada in the second quarter than in the first quarter. They spent \$1.4 billion, down 2.4%. It was the second decrease since peaking in the last quarter of 1996. Meanwhile, Canadians reduced their spending in countries other than the United States even more.

The international travel account deficit at its lowest level in four quarters



Standards of service to the public

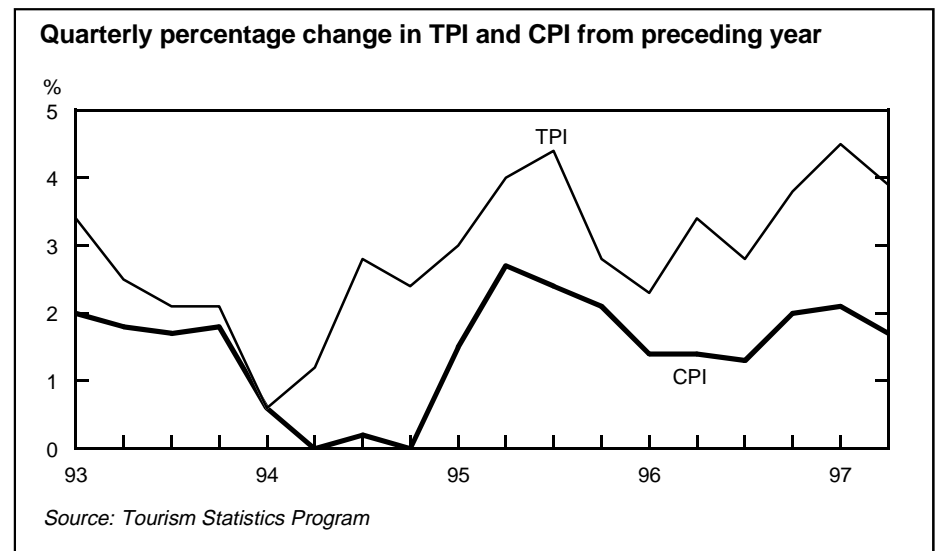
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Travel Price Index Second Quarter 1997

TPI up 3.9% from the same period last year

In the second quarter of 1997, consumers saw an increase of 3.9% in the prices of goods and services included in the Travel Price Index, compared to the same quarter last year. Driving this increase was a rise of 8.8% in the cost of inter-city transportation and 6.8% in the traveller accommodation costs. The cost of using local and commuter transportation and operating automotive vehicles also rose. In fact, in the second quarter of 1997, it cost travellers more for all goods and services used for



travel within Canada except for photographic equipment, rental and leasing of automotive vehicles, medicinal and pharmaceutical products, and photographic services and supplies. Cost of rental and leasing of automotive vehicles were down 2.3%.

In comparison, the CPI rose 1.7% in the second quarter of 1997 from the same quarter last year.

Note to readers

The Travel Price Index (TPI) is an aggregate index of the goods and services used by travellers in Canada. Price movements are derived from the detailed Consumer Price Index (CPI) series.

A technical report on the Travel Price Index is available from the Tourism Statistics Program at (613) 951-1673.

The Travel Price Index (TPI) and its Components

(not seasonally adjusted, 1986 = 100)

Components of the TPI	Second Quarter 1997	% Change	
		First Quarter 1997	Second Quarter 1996
Inter-city transportation	173.5	0.8	8.8
Local and commuter transportation	178.2	0.1	4.2
Rental and leasing of automotive vehicles	130.6	-0.5	-2.3
Operation of automotive vehicles	150.0	-0.4	1.9
Traveller accommodation	140.7	12.8	6.8
Food	129.9	0.2	1.3
Alcoholic beverages	149.3	0.5	1.7
Spectator entertainment	185.0	0.3	2.9
Clothing and footwear	133.6	1.5	2.0
Medicinal and pharmaceutical products	152.8	0.5	-0.7
Personal care	134.3	0.6	2.4
Photographic equipment	107.6	0.3	-3.8
Photographic services and supplies	116.1	-0.5	-0.4
Operation of recreational vehicles	154.3	-0.2	1.6
Audio discs and tapes	123.9	0.5	2.4
Use of recreational facilities and services	175.5	1.3	2.7
Reading materials and other printed matter	175.7	1.1	3.6
Tobacco products and smokers' supplies	152.1	1.0	6.1
Travel Price Index (TPI)	150.3	2.2	3.9
Consumer Price Index (CPI)	137.8	0.4	1.7

Sources: The Consumer Price Index, Cat. No. 62-001-XPB; and the Tourism Statistics Program

TPI up 2.2% from last quarter

The Travel Price Index rose 2.2% in the second quarter of 1997 from the previous quarter. During the second quarter of 1997, travellers had to pay 12.8% more for accommodation. Accommodation prices increased 8.3% from April to May and 12.0% from May to June. This increase was due in part to the introduction of higher summer rates. Also contributing were special events like the Formula One auto race in Montreal and the 500th anniversary celebrations of John Cabot's landing in Newfoundland. Consumers also spent 1.5% more for clothing and shoes and 1.3% more for the use of recreational facilities and services. Consumers benefitted from slight reductions in the cost of leasing automotive vehicles, of operation of automotive vehicles, and in the costs of photographic services and supplies.

During the second quarter of 1997, the cost of all goods and services included in the Consumer Price Index was up 0.4% from the previous quarter.

National Tourism Indicators

First Quarter 1997

Seasonally Adjusted

Tourism demand

In the first quarter of 1997, tourism spending (tourism demand) in Canada increased slightly (0.1%) from the previous quarter, as measured in constant prices. All tourism

goods and services sectors recorded decreases except for an increase of 0.4% in the transportation sector, mostly due to the passenger air transport, which represents more than half of the transportation sector.

Spending by Canadians declined by 0.3% which resulted in only a slight incline in tourism expenditures since non-residents spent 1.0% more during the same period. In current dollars, Canadians spent \$7.4 billion in the first quarter of 1997, 71% of the

total. Foreign visitors spent \$3.1 billion, or 29% of the total.

Employment

A total of 492,500 people were employed in tourism in the first quarter of 1997, 0.7% higher than the previous quarter. Employment was on the rise in the transportation, accommodation and food and beverage services sectors, but dropped in the other tourism industries.

TOURISM DEMAND AND EMPLOYMENT

First Quarter 1997 from Previous Quarter

Seasonally Adjusted

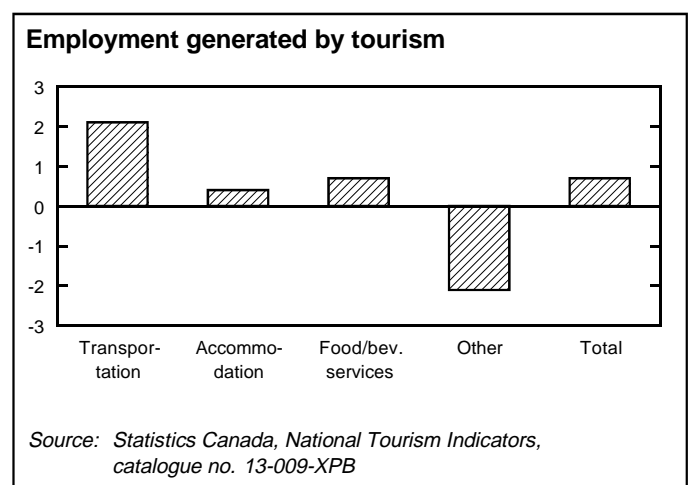
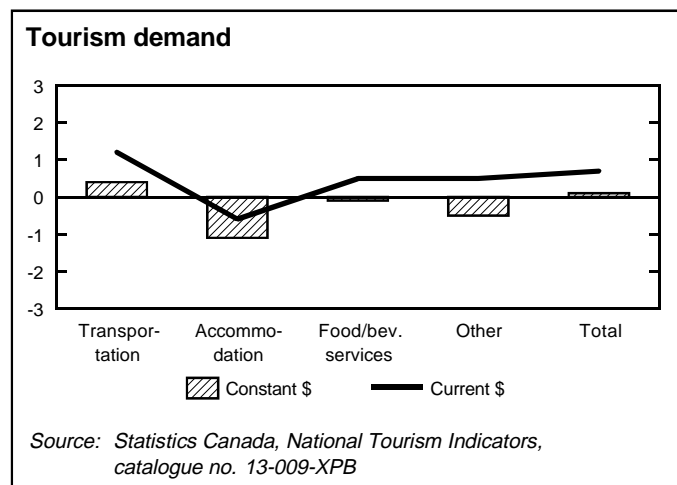
	Tourism Demand						Employment Generated by Tourism	
	IN CANADA		Domestic		Tourism exports		TOTAL	
	Change in		Change in		Change in		% Change	
	Constant \$	Current \$	Constant \$	Current \$	Constant \$	Current \$		
Transportation	0.4	1.2	0.4	1.5	0.5	0.1	Transportation	2.1
Accommodation	-1.1	-0.6	-1.9	-1.6	0.0	0.6	Accommodation	0.4
Food & Beverage Services	-0.1	0.5	-1.2	-1.0	1.5	2.6	Food & Beverage Services	0.7
Other	-0.5	0.5	-0.8	-0.3	0.6	2.4	Other	-2.1
Total	0.1	0.7	-0.3	0.3	1.0	1.6	Total	0.7

Source: Statistics Canada, National Tourism Indicators, Cat. No. 13-009-XPB

TOURISM DEMAND AND EMPLOYMENT

First Quarter 1997 from Previous Quarter

Seasonally Adjusted





	Second Quarter		% Change
	1996	1997	
VISITORS TO CANADA (000s)			
From United States	10,127	10,467	3.4
One or more nights visits	3,499	3,431	-2.0
- By auto	2,222	2,118	-4.7
From Overseas	1,317	1,225	-7.0
One or more nights visits	1,213	1,142	-5.8
Top Seven Countries:			
United Kingdom	196	201	2.6
Japan	171	149	-13.1
France	124	112	-10.3
Germany	120	101	-16.4
Australia	42	43	0.8
Taiwan	38	43	12.9
South Korea	45	42	-6.0
CANADIANS OUTSIDE CANADA (000s)			
To United States:	13,640	12,945	-5.1
One or more nights visits	3,745	3,719	-0.7
- By auto	2,331	2,210	-5.2
To Overseas (one or more nights)	791	871	10.0
INDUSTRY			
Airline passengers (Level I) (000s)	5,856	6,097	4.1
Airline passenger-km (Level I) (000,000s)	14,294	15,682	9.7
PRICES			
1986 = 100 (not s.a.)			
Travel Price Index	144.7	150.3	3.9
Consumer Price Index	135.5	137.8	1.7
- Restaurant meals	144.0	146.3	1.6
- Inter-city transportation	159.4	173.5	8.8
- Renting and leasing of automotive vehicles	133.7	130.6	-2.3
- Gasoline	133.0	129.7	-2.5
ECONOMIC			
Gross Domestic Product, 1986 prices (s.a.) (000,000s)	547,836	569,297	3.9
- Amusement and recreation (000,000s)	5,313	5,838	9.9
- Accommodation and food services (000,000s)	12,074	12,445	3.1
Personal disposable income per capita (s.a.)	17,161	17,160	0.0
LABOUR (000s)			
Labour force (s.a.)	15,116	15,331	1.4
Unemployed	1,456	1,438	-1.2
Employed	13,661	13,892	1.7
- Accommodation and food services (not s.a.)	906	904	-0.2
EXCHANGE RATES (in Canadian dollars)			
American Dollar	1.3645	1.3861	1.6
British Pound	2.0800	2.2676	9.0
Japanese Yen	0.0127	0.0116	-8.6
German Mark	0.8967	0.8086	-9.8
French Franc	0.2646	0.2398	-9.4
<i>(s.a.) seasonally adjusted.</i>			