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Spring 1991

Touriscope

In This Issue...

FEATURE ARTICLE

The Canadian tourism industry may obtain insights from the Canadian Travel Survey on some of the travel products pursued by Canadians.

DEPARTMENTS

- Markets

There were major market shifts in overseas travel to Canada in 1990 with France rivalling Germany for third place.

- Profile

B.C. Residents travel more than most Canadians, while they are more inclined to travel to destinations in their own province or in the United States than to other parts of Canada.

- Demographic Happenings

VFR travel to and from Canada is only in part determined by the country of birth of the 15% of the population born outside Canada.

- 1991 Census
- Announcements
- A Case In Point

A recent Transport Canada study used the Canadian Travel Survey to forecast transportation needs of an aging population.

City Sprees to Nature Experiences

BY LAURIE McDOUGALL

The Canadian tourism industry offers a wide range of products to the travel consumer. However, these products must continually evolve in order to keep up, and preferably keep ahead of changing consumer tastes. In addition, the industry is faced with strong competition from international destinations vying for consumers' disposable income.

The domestic tourism industry is facing an uphill battle even in the summer months, with Canadian outbound travel increasing at a faster rate than both domestic and international travel markets (Chart 1). The tourism industry's ability to keep Canadians at home as well as attract a larger share of international visitors is becoming more and more challenging.

The **Canadian Travel Survey**[1] (CTS), may be used by the tourism industry to obtain some insight into the types of experiences Canadians pursue in their own country. Five leading types of tourism product groups were selected, based upon trip activity participation during the summer quarter of 1990 (Chart 2). The products were further narrowed down to overnight trips taken for pleasure or to visit friends or family, types of accommodation and broad destinations (Chart 3).

It should be of key interest to marketers that trips involving these product groups create expenditures twice the average of all non-business trips!

See footnote on page 4.

▸Continued from page 1

Outdoors Product

Canadian travellers love the great outdoors, especially in the summer, the most preferred travel season. They took over one million outdoor trips between July and September 1990, making outdoors the most popular of the five product groups (Table 1). Outdoors was also found to be the lowest cost product involving average spending of only $350. Travel close to home (typically under 320 km), with shorter durations such as weekend get-aways and involving camping, all contributed to the low average.

Families were the largest consumers of outdoors trips, although even at this time of year, there were no children travelling on 4 out of 10 of them.

Over half of outdoor travellers reeled in their fishing lines while they were away from home (Table 3). Many travellers pursued other outdoor sports such as hiking, cycling, kayaking. They also had other things on their travel itinerary. They took a dip, went sightseeing or dropped in on family or friends.

Golfing

About 200,000 households took their golf clubs with them on a summer trip in 1990. Their expenses at $740 a trip were nearly three times the non-business average. Even among this high spending group, close to one-third used campsites, although rather more (41%) paid for a roof over their heads (Table 1).

Golfers and their companions took longer trips, usually lasting a week and were just as likely to have children in tow as not. They also took time for visits and overnight stays with friends and family, swimming, sightseeing and browsing in shops.

Nature Experience (Camping)

Each summer many Canadians escape the heat of the city and head to their favourite campground. During the summer of 1990, Canadians took 700,000 of these trips, the second largest tourism product selected. They generated $271 million in travel spending, for an average of almost $400 per trip.

Chart 1
Indexes of Travel by Canadians, 1980-1990 (Overnight Trips)

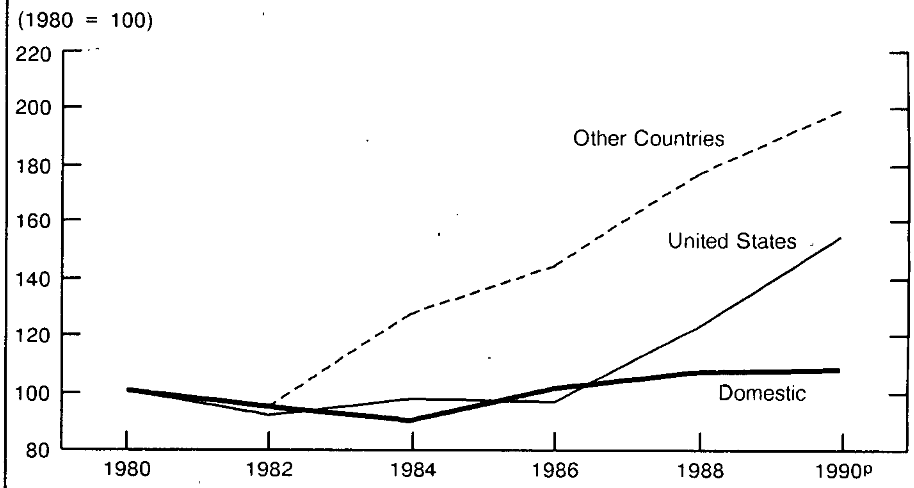

Table 1
Domestic Travel By Product Group, Third Quarter 1990

	Household			Average spending per trip
	Trips[1]	Nights	Spending	
	000s	000s	$000,000s	$
Total	**16,137**	**62,207**	**4,512**	**280**
Purpose:				
Pleasure and visit friends or relatives	12,640	51,500	31,122	250
Selected Product Groups[2]				
Outdoors Experience	1,000	4,740	354	350
Golf	200	1,430	153	740
Nature Experience – Campers	700	4,080	271	370
Nature Experience – Comfort	430	2,670	301	710
City Spree	780	4,260	561	720

1 *Household-trips refers to all household members who travelled together 80 km or more away from home. For example, if four people from the same household travelled together this would represent one household-trip.*
2 *Product groups are not mutually exclusive, so double-counting may occur when selection criteria overlap.*

Nature enthusiasts drove just over 500 km to their campsites, the second shortest average distance travelled among the five selected products.

Families were the primary market for this product. For other activities they favoured sightseeing and swimming, while shopping for groceries and souvenirs or visiting people they knew in the area were also commonly undertaken.

Nature Experience (Comfort)

Travellers who enjoy visiting parks but like the comfort of commercial lodging took 430,000 trips during the third quarter 1990. They travelled longer distances to get to their destinations compared to the camping group (760 km on average) but their average length of stay was the same at 6 nights.

▸Continued from page 2

While half of this group checked into hotels and motels, a quarter of them stayed with friends or family. Rental cottages were used for 20% of their nights.

Adult travel parties were nearly as numerous as families with children among users of this product. Travelling in comfort had more appeal to couples (30%) than the camping experience.

Urban type activities are characteristic of this group. Sightseeing is the number one pastime, and the highest among the five groups. Over half of this group devoted time to shopping. Compared to their camper counterparts, they were much more likely to visit zoos, museums or natural displays but less likely to partake in outdoor sports or activities. Pampering themselves to dinner at a nice restaurant is a trait of this group.

City Spree

Canada's cities[2] attracted 800,000 city spree trips during the summer of 1990. These city sprees generated $720 per trip, the second highest average spending of the five selected groups.

Although most travellers drove to their city destination, more frequent air travel among the city spree product resulted in a higher average trip distance - close to 1,000 km. City spree is the product group most likely to capture travellers from another province.

City sprees usually lasted 5 nights or longer, however, they did claim the largest share of one night visits among the five products. They were the only one of the five that attracted more couples and singles than families.

Most city travellers go out and about sightseeing and shopping. Enjoying good food and wine at a nice restaurant or dancing at a club are also common outings. Museums, zoos or nature exhibits were of interest to over 30% of parties.

Domestic Product Potential

Understanding domestic travel product use can help identify potential opportunities. For example, not all nature buffs like to rough it in the great outdoors. Programs that include the promotion of parks in conjunction with nearby hotels and motels would appeal to certain consumer markets. Hotels or resorts could offer packages that include special park programs or events.

The city product[1] is attractive primarily to couples and singles. Perhaps city trips need to be packaged more with local summer events or exhibits that may better suit the family market. Since city sprees have a strong potential for out of province visitors it is important for tourism promotion material to provide sufficient information related to the city product to people in other provinces.

See footnote on page 4

Chart 2

Activity Information
Canadian Travel Survey
Third Quarter 1990

On this trip, did you participate in any of the following activities...

Visiting friends or relatives
Festivals or events
Shopping
Sightseeing
Attend cultural events e.g. plays, concerts
Nightlife/entertainment
Dining at high quality restaurants
Visit a theme park
Visit zoo/museum/natural display
Visit a national park
Visit an historic site
Visit a provincial park
Visit a regional/municipal park
Attend sports events
Participate in sports or outdoor activity
(specify)

- Swimming
- Other water sports
- Golfing
- Hunting
- Fishing
- Other

None of the above

Chart 3

Product Group Selection Criteria

Overnight Travel - Third Quarter, 1990

A trip taken for pleasure or visiting friends or relatives fitting at least one of the following group criteria:

Outdoors Experience
Activities: Hunting, fishing, other sports or outdoor activities.
Accommodation: Hotel, motel, commercial cottage or camping.
Destination: All areas.

Golf
Activities: Golfing.
Accommodation: Hotel, motel, commercial cottage or camping.
Destination: All areas.

Nature Experience - Camping
Activities: Visit zoo, museum, natural display, national park, historic site, provincial park or regional/municipal park.
Accommodation: Camping.
Destination: Non-Census Metropolitan Areas only.

Nature Experience - Comfort
Activities: Visit zoo, museum, natural display, national park, historic site, provincial park or regional/municipal park.
Accommodation: Hotel, motel or commercial cottage.
Destination: Non-Census Metropolitan Areas only.

City Spree
Activities: Attend sports events, shopping, sightseeing, nightlife/entertainment, dining at high quality restaurants, festivals or events, attend cultural events, visit zoo, museum, natural display or a theme park.
Accommodation: Hotel or motel.
Destination: Census Metropolitan Areas only.

Table 2
Profile of Trips By Product Group, Third Quarter 1990

Activity[1]	Outdoors Experience	Golf	Nature Experience: Camping	Nature Experience: Comfort	City Spree
			%		
Automobile	95	97	96	94	85
80 - 319 km	56	41	46	30	37
320 - 799 km	30	30	30	33	29
800 km and over	12	25	18	30	33
Average distance (km)	470	660	540	760	990
Hotel	8	18	--	17	33
Motel	6	10	--	34	26
Camping	61	32	88	--	4
Commercial Cottage	12	13	--	19	2
Friends/Relatives	9	22	6	24	31
Weekend	56	32	44	32	47
Non-weekend	43	65	54	66	51
1 night	12	8	6	10	23
2 nights	32	20	20	20	24
3-4 nights	25	24	33	24	20
5 + nights	31	47	41	45	33
Average duration (nights)	5	7	6	6	5
Adults with children	56	50	61	53	40
Adults only	44	50	39	47	60
1 adult	17	7	18	13	20
2 adults	24	35	18	30	37

Table 3
Activity Participation by Product Group, Third Quarter 1990

Activity[1]	Outdoors Experience	Golf	Nature Experience: Camping	Nature Experience: Comfort	City Spree
			%		
Sightseeing	41	49	62	78	69
Shopping	23	48	33	53	69
Visiting Friends/Family	33	54	35	46	46
Swimming	43	53	50	35	13
Dining-high quality restaurants	10	31	10	42	38
Night Life/Entertainment	8	22	5	19	29
Zoo/Museum/Natural Display	15	18	28	41	32
Fishing	56	14	22	8	--
Other sports or outdoor activities	49	7	22	14	6

[1] *Travellers may participate in more than one activity during a trip, therefore the sum of activities by Product group exceeds 100%.*

Continued from page 3

As travellers become more knowledgeable, adventuresome and well-travelled there is a challenge for the Canadian tourism industry to be more innovative in creating new products. This is especially challenging given the recent increases in Canadian travel outside the country.

[1] *The Canadian Travel Survey collects information on Canadians travelling in Canada. For purposes of this article, the minimum one-way distance travelled is 80 km.*

[2] *Refers to the 25 Census Metropolitan Areas, which are defined as those urban areas with a population over 100,000.*

Source: Canadian Travel Survey, Third quarter 1990, special tabulations.

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Travel-log

Editor's Note...

*We welcome your views on articles and suggestions for upcoming articles in **Travel-log.** We also encourage readers to inform us about how they are using Statistics Canada's tourism data.*

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MARKETS

Record Travel Deficit in 1990

By Lise Beaulieu-Caron

Canada's deficit on the international travel account reached a record $4.5 billion in 1990, up 30% from 1989 (Chart 4). Most of the increase in the deficit is the result of a 14% increase in Canadian spending in the United States, contrasting with a mere 2% increase in American spending in Canada (Table 4).

The steadily increasing strength of the Canadian dollar (Chart 5) and the perception of lower American prices, notably for gasoline (Chart 6), inevitably increased the attractivity of the United States to Canadian travellers and shoppers, while rendering Canada less appealing to American visitors.

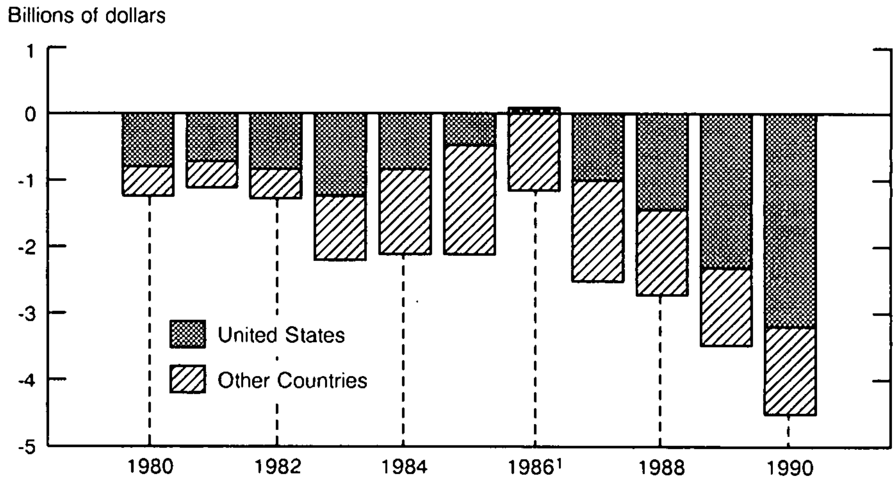
Japanese and French Markets Expand

United States and overseas travel to Canada in 1990 was virtually at the same level as 1989. However there were some major market shifts. Japan's second position in the overseas marketplace was strengthened by a 6% growth. France's expansion rivalled Germany for third place. The United Kingdom, Canada's largest overseas market, sent 2% fewer visitors during 1990 (Table 5).

For European travellers to Canada, exchange rates moved strongly to their advantage in 1990, but possibly not soon enough in all cases to make major changes to be made in their travel plans (Table 6).

The euphoria associated with German reunification and related political and economic developments may have deterred some potential travellers from visiting Canada in 1990. In addition,

Chart 4
Deficits on International Travel Account, 1980-1990

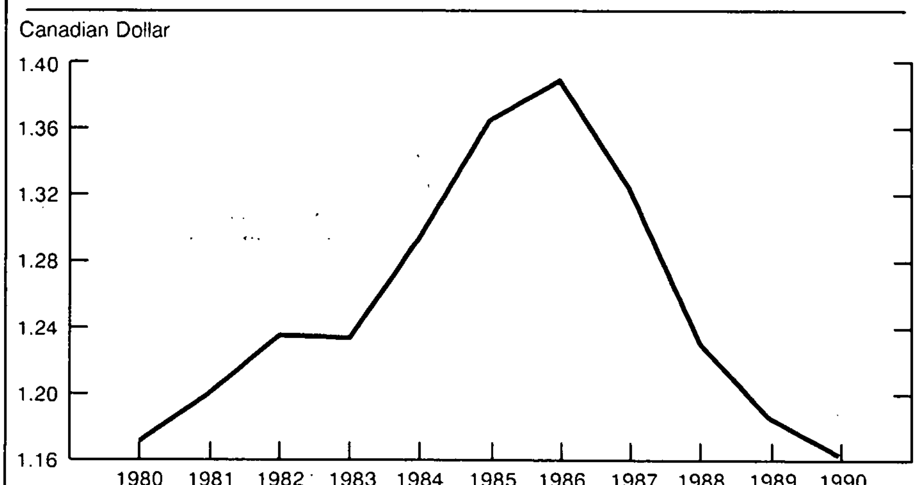


¹ *Surplus on Travel Account with the United States in 1986*

Table 4
Balance of Travel Payments, 1989 and 1990

	1989	1990p	Increase 1989-90
	$000,000,000s		%
Visitor Spending in Canada			
United States	4.3	4.4	2
Other countries	3.0	3.1	4
Total	**7.2**	**7.4**	**3**
Canadian Spending in			
United States	6.6	7.6	14
Other countries	4.1	4.4	7
Total	**10.7**	**12.0**	**12**
Deficit	3.5	4.5	30

Chart 5
United States Dollar in Terms of Canadian Dollar, 1980-1990



▸Continued from page 5

Europeans may have been encouraged to travel more in their own continent to take advantage of the new accessibility of many Eastern European countries.

Economic conditions at home and political events in the Persian Gulf may have deterred British travel overseas in 1990.

A Record 20 Million Canadian Trips Outside the Country

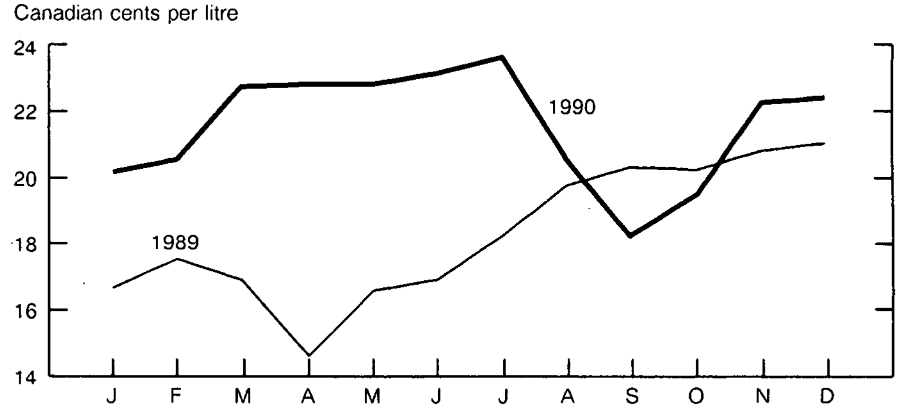
Canadians' increasing propensity to travel to the United States resulted in an additional 10 million visits. At the same time Canadians took 157,000 more trips to countries other than the United States. This increase was spread evenly throughout the year, despite the absence of exchange rate benefits and the uncertainty associated with the invasion of Kuwait and the arms build-up in the Persian Gulf.

Sources: International Travel, 1989, Catalogue 66-201; International Travel Survey, special tabulations; Bank of Canada Review, January, 1991.

Lise Beaulieu-Caron is a Senior Analyst with the Education, Culture and Tourism Division (613-951-1791).

Chart 6

Canada vs. United States Gasoline Price Differentials, 1989 and 1990[1]



[1] *Amount by which gasoline prices in Canada exceeded those in the United States*

Source: *Petroleum Products Section, Canadian Oil Markets and Emergency Planning Division of Energy, Mines & Resources*

Table 5

International Travel Traffic to and from Canada, 1989 and 1990

	1989	1990p	Change 1989-90
	000s visits		%
Travel to Canada from:			
United States	34,705	34,734	--
same-day	22,521	22,467	--
one or more nights	12,184	12,267	1
Other Countries	3,277	3,256	-1
United Kingdom	615	602	-2
Japan	463	474	3
West Germany	309	291	-6
France	262	276	5
Other	1,628	1,613	-1
Total	**37,982**	**37,990**	**--**
Travel by Canadians to:			
United States	59,911	70,433	18
same-day	44,585	53,106	19
one or more nights	15,326	17,327	13
Other countries	2,996	3,153	5
Total	**62,907**	**73,585**	**17**

Table 6

Changes in Foreign Exchange Rates, 1989-1990

Foreign Currency	Annual Average 1989-1990	Monthly Average Dec.89-Dec.90
	% change in Canadian dollars	
American dollar	-1.5	-0.1
British pound	7.2	19.2
Japanese yen	-6.0	7.4
German mark	14.8	16.1
French franc	15.6	16.8

PROFILE

Travel by B.C. Residents

By Bob Chadwick

British Columbia, Canada's Province on the Pacific Rim, is third among all provinces in terms of both area and population. As a source of travellers, it is fourth after Alberta.

The Mountains are a Barrier

Residents of British Columbia participate in travel somewhat more

▸Continued from page 6

than most Canadians. However, they show a stronger inclination to travel south of the border than visit other provinces. They also have a propensity to travel to other countries, although in this they rank third after residents of Ontario and Quebec.

During 1988, 75% of B.C. residents travelled to a domestic or international destination. This was above the Canadian average of 71%. On the other hand, only 21% travelled to other provinces (Canada average was 25%) while 29% took at least one trip to the United States (Canada average 23%) (Table 7).

When west coasters venture across the mountains, they generally go no further than Alberta (904,000 visits in 1988). However, almost 200,000 British Columbians travelled as far east as Ontario (Table 8).

Just Across the Line

There are eight times as many B.C. residents who travel "Across the 49th Parallel" as those who go to more remote destinations. They took 2.5 million overnight trips to the United States in 1989, 80% of the time to the neighbouring Pacific Region, primarily into the State of Washington. Another 10% headed for the nearby Mountain Region, while the remaining 10% spent their dollars elsewhere in the U.S.A. (Tables 8 and 9).

Pacific Rim and Transatlantic

For B.C. residents the favourite destinations beyond Canada and the continental United States are Hawaii and Britain. While Britain greeted 100,000 visitors from B.C. in 1989, the offshore state of Hawaii said aloha to 106,000 (Tables 10 and 11).

Mexico with 58,000 B.C. visitors almost matched the 59,000 whose main destination was continental Europe. Other Pacific Rim countries, which joined some traditional European destinations in the top 10 countries visited by British Columbians in 1989, were Hong Kong, Japan and Australia (Table 11).

Table 7

Participation in Non-business Travel, Residents of Canada and British Columbia, 1988

Destination	Participation rate[1] Canada	B.C.
	%	
Total population	**100**	**100**
Travellers:		
All destinations	71	75
Canada:	64	
In their own province	56	59
To other provinces	25	21
United States	23	29
Other countries	9	7

[1] *Persons aged 15 years and over who took at least one trip.*

Table 8

British Columbian Travel Within Canada, 1988

Provinces visited by British Columbians	Visits	Distribution
	000s	%
Total	**8,349**	**100**
British Columbia	6,818	82
Other provinces	1,531	18
Alberta	904	11
Ontario	198	2
Saskatchewan	120	1
Other	309	4

Sources: Domestic Travel, 1988, Catalogue 87-504; Canadian Travel Survey, special tabulations; International Travel, 1989, Catalogue 66-201; International Travel Survey, special tabulations.

Bob Chadwick is Special Advisor, Tourism; Education, Culture and Tourism Division (613-951-1673).

Table 9

British Columbian Travel Around the Globe, 1989

Destination	Trips	Distribution
	000s	%
Total	**2,854**	...
To the United States	2,527	100
Pacific	2,029	80
Mountain	247	10
Hawaii	97	4
Atlantic	66	3
Other	94	4
To other countries	327	100
Europe	154	47
United Kingdom	95	29
Continental Europe	59	18
Asia	46	15
Cruises	22	7
Other (including Mexico)	101	31

Table 10

Top Ten States Visited by B.C. Residents, 1989

States visited	Visits	Distribution
	000s	%
Total visits	**3,304**	**100**
Washington	1,778	54
California	364	11
Oregon	314	10
Nevada	211	6
Hawaii	106	3
Idaho	81	2
Montana	67	2
Arizona	43	1
Florida	38	1
New York	21	1

Table 11

Top Ten Countries Visited by B.C. Residents, 1989

Countries visited	Visits	Distribution
	000s	%
Total visits	519	100
United Kingdom	100	19
Mexico	58	11
Germany (W)	37	7
France	26	5
Netherlands	25	5
Hong Kong	22	4
Italy	18	3
Japan	16	3
Australia	15	3
Switzerland	14	3

DEMOGRAPHIC HAPPENINGS

Immigration and International VFR Travel

By Bob Chadwick

Close to 4 million or 15% of all Canadians were born outside Canada. In many cases these foreign-born Canadians have friends and relatives in their countries of birth, with whom they like to exchange visits. This offers a rich market for VFR travel (visiting friends or relatives) both to and from Canada.

More than half of all the nights spent in Canada in 1989 by visitors from countries other than the United States, were recorded by persons who came primarily to visit friends and relatives (Table 12). VFR visits to Canada in 1989 resulted in expenditures of over a billion dollars, excluding air fares. In the same year Canadian VFR travellers spent $1.2 billion outside Canada.

Table 12
VFR Travel to and from Canada, 1989

	Total travel	VFR travel	VFR as a percentage of total travel
	000s		%
Person-trips			
Visitors to Canada from			
United States	12,184	2,569	21
Other countries	2,927	1,076	37
Visits by Canadians to			
United States	15,325	3,212	21
Other countries	2,996	771	26
Person-nights			
Visitors to Canada from			
United States	53,598	13,077	24
Other countries	36,424	18,597	51
Visits by Canadians to			
United States	114,536	20,315	18
Other countries	55,560	18,835	34
Expenditures	$000,000s		
Visitors to Canada from			
United States	3,590	438	12
Other countries	1,947	600	31
Visits by Canadians to			
United States	5,130	582	11
Other countries	3,009	611	20

Table 13
Top Ten Countries of Birth and VFR Travel

Rank No.	Place of birth outside Canada, 1986: Country	Persons	Trips to visit friends or relatives, 1989 — Visitors to Canada: Country	Visitors	Canadian visits to other countries: Country	Visits
		000s		000s		000s
1.	U.K.	793	U.S.A.	2,569	U.S.A.	3,212
2.	Italy	367	U.K.	289	U.K.	291
3.	U.S.A.	282	W.Germany	96	France	92
4.	W.Germany	158	France	61	W.Germany	73
5.	Poland	157	Japan	45	Italy	66
6.	Portugal	140	Hong Kong	43	Netherlands	63
7.	Netherlands	134	Netherlands	42	Switzerland	35
8.	India	130	Australia	39	Australia	32
9.	China	119	Italy	32	India	19
10.	U.S.S.R.	109	Poland	19	Hong Kong	17
			Switzerland	19		

USA and UK are Top VFR Markets

Six of the top ten countries of birth show up in the top ten countries of both VFR visits to Canada and Canadian VFR visits (Table 13). The United Kingdom is the leading country of birth for foreign born Canadians, while the United States is first in Canada's inbound and outbound VFR travel. The UK is second in VFR travel to and from Canada.

Strong VFR Markets in Several European Countries

While Italy is second after the United Kingdom as a country of birth for Canadians, it claims only sixth place in countries visited by Canadians on VFR trips and it is in only ninth position as a source of VFR visitors.

Germany, in fourth place as country of birth, is the third most important VFR market for Canada and it is the fourth most popular country for VFR visits by Canadians. On a per capita basis, the VFR travel generated by the German community in Canada exceeds that of Canadians born in Britain.

Although France is 17 places from the top of the list as a country of birth for Canadians, family ties and friendship make it the third most popular country for Canadian VFR visits and the fourth most common source of VFR visitors to Canada.

The Dutch community in Canada have generated a steady flow of VFR travel in both directions across the Atlantic. On a per capita basis it is comparable with that produced by British born Canadians. This may help to explain why in 1990 KLM chose to

▸*Continued from page 8*

be the first European airline to introduce scheduled air service to Ottawa and Halifax.

The Pacific Rim and VFR Travel
Despite the relatively small numbers of Canadians born in Japan, Hong Kong and Australia, all three countries are major sources of VFR visitors. On the other hand, India and China, leading countries of birth for Canadians, have so far been smaller VFR travel markets.

Sources: Ethnicity, Immigration and Citizenship, 1986, Catalogue 93-109; International Travel, 1989, Catalogue 66-201.

1 9 9 1 · C E N S U S

CENSUS DAY

June 4 • Count Yourself In!

Oh Yea...Oh Yea...Oh Yea

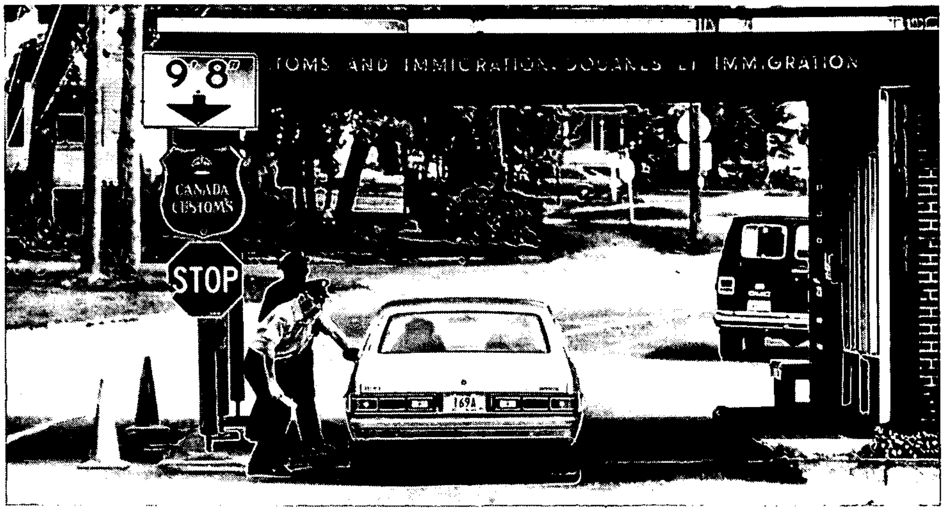
Let it be known that on the fourth day of the sunny month of June, a survey will be undertaken throughout the land in order to produce a complete count of the nation.

Once every five years Statistics Canada carries out the Census of Population and asks someone from every Canadian household to fill in a questionnaire.

This is the largest survey conducted in Canada. It produces a wealth of information that is vitally important for you in establishing your marketing plans and in determining your business decisions.

How does the Census affect you?
Tourism business professionals use information from the Census to identify their markets, to plan the types of services they will provide and to choose the best locations for their retail outlets.

The hospitality industry has come to depend on the information that is available through the Census. By tracking social trends and keeping on top of changes in the country, they are able to respond effectively to the needs of the population they serve.



Restaurant associations use Census data to forecast consumer trends. The success of a new menu, for example, can depend on the demographics of your local market. Family size, age of members, income, the number of working women, ethnic background all of these influence consumer trends.

The airlines can use Census data to plan advertising and seat sale promotions. Flights to Rome, for example, might be heavily subscribed after publicity in Metropolitan Toronto where almost 360,000 people of Italian origin live.

Tour operators and travel agencies use Census data to respond to specific market segments. According to *Small Business Magazine* (Oct. '87), one Toronto travel agency realized more than $6 million in revenue after specializing in senior citizen tours. After all, the 1986 Census tells us that over 10% of all Canadians were 65 and over and their number increases every year.

Your success depends on our success
You need the best information to support your business plans and decisions the Census can provide it. This information, however, is dependent upon quality of the data collected. A 100% response will help to achieve top quality results.

Statistics Canada guarantees that individual responses are kept strictly confidential. The combined answers of all households provide vital planning information in detail that can be as small as a neighbourhood.

How can the Tourism Sector help?
The more people are aware of the Census and how it is used, the more successful the Census will be on June 4.

Help spread the word! Promotional materials, such as posters and brochures are available from Statistics Canada at no charge. Use them where they will be seen by staff and visitors - at the reception desk and in public access areas such as health club facilities or lobbies and elevators.

Hotels and motels play a particularly important role in collecting information on Census Day. Every guest will receive a special Census questionnaire which will be collected on June 4.

Do you need more information?
Contact the nearest Statistics Canada Census Office. The staff will be pleased to provide you with promotional material and hear your ideas on how to make Census '91 work better for everyone.
(Regional offices are located in St. John's, Halifax, Montreal, Ottawa, Toronto, Winnipeg, Regina, Edmonton, Calgary and Vancouver.)

Source: Census Public Communications, Statistics Canada, Ottawa, Ontario, K1A 0T6

ANNOUNCEMENTS

Overnight Domestic Travel, Summer 1990 – Highlights

Domestic travel was slightly lower in the third quarter of 1990 than two years earlier, marking the first decline since 1982-1984, an earlier recessionary period (Table 15).

Commercial Transportation Use Nosedives
Canadians took 19% less air trips in the summer of 1990 than in the summer of 1988. They also travelled less by bus and by rail. Half of this reduced use of commercial transportation was recovered by the automobile.

Business Travel Down
Business travel, no doubt reflecting the slowdown in the economy, slumped 11% from the summer of 1988. Some of the loss resulting for the travel industry was offset by a growth in travel to visit friends or relatives.

Away at the Cottage
Canadians spent more nights at their summer homes in 1990 than in 1988. On the other hand, it was not a good season for commercial lodging establishments. Least affected were hotels which experienced virtually no change in guest nights.

Travel to Other Provinces Down
Canadians travelled less to other provinces in 1990, but within province travel remained level with past summers.

For more details on Canadian Travel Survey findings for 1990, see the **Summer 1991** issue of **Travel-log** and Cat. No. 87-504, **Domestic Travel in Canada 1990**, which is to be released later this year.

Table 14
Overnight Domestic Travel Compared, Summers 1988/1990

	Summer 1988	Summer 1990	Change
	000,000s		%
Total person-trips	**30.2**	**29.9**	**-1**
Transportation			
Air	1.9	1.5	-19
Bus	0.7	0.6	-8
Rail	0.4	0.2	-55
Auto	27.0	27.3	1
Primary purpose			
Business	3.3	2.9	-11
Pleasure	15.2	15.1	-1
Visiting friends/relatives	10.1	10.4	3
Destination			
Other province	5.9	5.5	-7
Within province	24.3	24.5	1
	000,000s		
Total person-nights	**119.6**	**119.1**	**--**
Accommodation			
Hotels	10.9	10.9	--
Motels	9.2	8.4	-8
Campgrounds	20.9	20.2	-3
Private cottage	23.9	28.0	17
Friends/Relatives	46.3	43.8	-6

January 1991 – Dramatic Changes in Travel Flows

International travel plummeted in some of its major sectors in January 1991. The sector showing the greatest drop was air travel by Canadians to the United States, down by 15% from January 1990. This was in contrast to an 8% increase in this sector for the whole year of 1990. At the same time, travel by Canadians to other countries and by Americans to Canada were each down by 9% (Table 14).

Leading Overseas Markets Encouraging
Three of Canada's four top overseas markets performed better in January 1991 than throughout 1990. Entries from Japan were up by 25%, France (12%) and Germany (10%). In the case of the United Kingdom market, on the other hand, entries were down 1%. This reduction, together with larger percentage decreases from other overseas countries, produced a net 3% reduction in overseas visitors in January 1991.

Canadian Car Travel to the States Continues to Grow
The attraction of the United States to Canadians travelling by car continued to grow almost unabated in January 1991, when 14% more Canadians drove over the border than in January 1990. This increase included 53,000 trips involving a stay of one or more nights. At the same time air travel was down by 65,000 trips.

Special Circumstances
It is impossible to relate the changes in international tourist flows to each of the special circumstances evident at the start of the year. Undoubtedly many of the changes were due to consumer reaction to the Gulf War. This event made air travel less attractive because of the implementation of fuel surcharges and heightened concerns about terrorist activity. There was also some reduced availability of flights, but this was mostly in response to reduced demand for air travel.

Another possible deterrent to travel in early 1991, was the institution of the Goods and Services Tax, an entirely new cost of living item for the consumer to

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get used to and an add on to air fares to the United States. For the car traveller, however, the price differential for gasoline continued to make driving in the United States much cheaper than in Canada.

Another more pervasive factor not confined to Canada is the economic recession, the effects of which are likely to be reflected in travel statistics throughout 1991.

For more details on international travel to and from Canada in January and the ensuing months of 1991, subscribe to the monthly and quarterly Statistics Canada publications in the Touriscope series on international travel statistics, catalogue numbers 66-001p and 66-001.

Table 15
International Travel by Visitors to Canada and Residents of Canada, January, 1990 and 1991

Sector	January 1990	January 1991	January 1990/91 Change	Jan-Dec 1989/90 Change
	000s		%	
Visitors to Canada from				
United States	**1,730**	**1,570**	**-9**	--
Automobile	1,535	1,389	-10	-1
Same-day	1,282	1,151	-10	-1
One or more nights	252	238	-6	--
Plane	133	123	-8	3
Other methods	63	59	-7	3
Other countries	**122**	**118**	**-3**	**-1**
United Kingdom	17	17	-1	-2
Japan	18	23	25	2
Germany[1]	9	9	10	-6
France	7	8	12	5
Other	72	62	-14	-1
Residents of Canada to				
United States	**4,555**	**5,052**	**11**	**18**
Automobile	3,978	4,546	14	19
Same-day	3,389	3,904	15	20
One or more nights	589	642	9	15
Plane	447	382	-15	8
Other methods	130	124	-4	4
Other countries	**363**	**330**	**-9**	**5**

1 *Germany(W) in 1990.*

CASE IN POINT

Transport Canada Looks at Aging

By Chris Holloway

What will be the demands placed on transportation in Canada by an increasingly aging population? A recent study by Transport Canada used a comparative profile of data from the Canadian Travel Survey (CTS) for this purpose.[1]

The CTS was found to be the most appropriate survey source for this study because it is the only comprehensive national collection of data, reflecting travel trends of Canadians on all modes of transport.

The study shows that by the turn of the century, almost one-quarter of Canada's population will be 55 years of age or over. The median age for travellers in Canada is now 38.8 years. These travellers are healthier, more affluent and are demanding more mobility in their senior years. The majority of the Canadian population which, over the past three decades, has grown up with the automobile, is now using the car for most of its travel in Canada.

Car use has enabled people to travel more quickly from door to door, for shorter distance trips which are usually completed in one day. Travel by automobile continues to be the overwhelming choice for Canadians of all ages.

The automobile will undoubtedly remain the main mode of travel over the next decade and, as the population matures, special driver programs may have to be instituted for the monitoring and retraining of senior drivers.

The CTS shows that leisure is the predominant reason for all travel in senior years (persons 55 +), with visits to friends and relatives a close second. Again with the convenience of the automobile, the majority of the trips are completed in one day.

Statistics show that as air travel declines with increasing age, travel by bus and rail generally increases. An intermodal ticketing and reservation system would make travel arrangements much simpler for the elderly, as would integrated intercity passenger service, made more accessible through the design and installation of multimodal passenger terminals. The possibility of intermodal baggage handling would be a particular asset for the older passenger.

Increased discretionary incomes offer senior Canadians the chance for expanded mobility. However, seniors after retirement are in positions of relative economic need. This need will not be helped by generally rising transportation costs, particularly for fuel, which show few signs of abating.

1 *Transportation in an Aging Society, An Analytical Review for Transport Canada Policy and Coordination Branch; Chris Holloway, February 1991.*

Chris Holloway, formerly Executive Director of Transport 2000 Canada, is now an Ottawa based transportation consultant.

TOURISCOPE INDICATORS

		Fourth Quarter 1990	Percentage Change: Previous Quarter	Percentage Change: Previous Year		Year 1990	Percentage Change: 1989-1990
VISITORS TO CANADA							
From United States	T	6,604	-51.6	2.9	T	34,734	0.1
Overnight visits(p)	T	1,961	-64.8	3.1	T	12,267	0.7
By auto	T	1,303	-67.5	2.4	T	8,381	-0.4
From Overseas	T	546	-61.8	-2.3	T	3,256	-0.6
Overnight visits(p)	T	491	-62.8	-2.8	T	2,991	0.6
Top Seven Countries							
United Kingdom	T	87	-67.3	-3.3	T	559	-1.9
Japan	T	69	-60.1	3.0	T	413	5.9
France	T	37	-70.6	8.8	T	260	6.1
West Germany	T	36	-70.7	-10.0	T	255	-5.6
Australia	T	21	-53.3	--	T	112	1.8
Hong Kong	T	20	-60.8	-13.0	T	125	5.9
Italy	T	16	-64.4	6.7	T	91	-2.2
CANADIANS OUTSIDE CANADA							
To United States	T	17,232	-21.0	22.2	T	70,433	17.6
Overnight visits(p)	T	3,591	-42.9	13.6	T	17,327	13.1
By auto	T	2,467	-51.4	20.0	T	12,164	15.3
To Overseas	T	602	-27.8	1.5	T	3,153	5.2
INDUSTRY SECTOR							
Airline passengers (Level I)	T	4,709	-19.2	-6.1	T	21,239	-5.6
Airline passenger-km (Level I)	M	10,543	-28.9	-6.0	M	50,126	-5.7
Inter-city bus passengers	T	3,626	-12.4	-13.3	T	14,739	-13.9
Restaurant receipts	M	4,276	-10.6	-2.3	M	17,827	3.1
PRICES							
1981 = 100 (not s.a.)							
Travel price index		173.8	2.7	9.8		167.3	7.0
Consumer price index		161.1	1.4	5.0		158.2	4.8
Restaurant meals		162.2	1.3	5.1		159.1	4.9
Inter-city transportation		212.9	-0.3	19.7		202.6	14.0
Gasoline		179.7	11.3	22.7		162.5	14.8
ECONOMIC							
Gross domestic product, 1986 prices (s.a.)	M	505,366	-0.9	-1.1	M	509,727	0.7
Amusement and recreation	M	4,690	-0.8	0.1	M	4,688	2.9
Accommodation and food services	M	12,750	-1.7	-3.9	M	13,087	1.7
Personal disposable income per capita (s.a.)		17,523	--	2.9		17,330	4.0
LABOUR FORCE							
Labour force (s.a.)	T	13,745	0.2	1.2	T	13,682	1.3
Unemployed	T	1,252	10.2	21.2	T	1,110	9.0
Employed	T	12,493	-0.7	-0.4	T	12,572	0.7
Accommodation and food services (not s.a.)	T	733	-8.1	-1.9	T	767	3.6
EXCHANGE RATES							
In Canadian Dollars:							
American Dollar		1.1610	0.7	-0.6		1.1668	-1.5
British Pound		2.2582	5.0	21.9		2.0808	7.2
Japanese Yen		0.008881	11.4	8.8		0.008092	-6.0
German Mark		0.7734	6.7	19.8		0.7234	14.8
French Franc		0.2294	6.2	20.9		0.2147	15.6
Mexican Peso		0.000397	-0.8	-10.4		0.000412	-13.8

(M) Millions. (T) Thousands. (s.a.) seasonally adjusted. (p) preliminary.