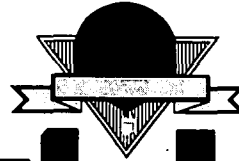



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Summer 1991

Domestic Travel – A Decade of Change

Touriscope

In This Issue...

FEATURE ARTICLE

Is the domestic tourism industry in trouble? Over the decade travel in Canada did not keep up with population growth, while over the same period, Canadians have been heading outside the country in record numbers.

HIGHLIGHTS

- British Columbians travelled more in Canada as well as south of the border.
- Business travel was a major growth area for the tourism industry over the decade. Overnight business trips advanced 30% compared to a 2% increase in leisure trips.
- Airlines seated fewer leisure passengers on their planes over the ten year period, but a substantial gain in business travellers more than compensated for the loss.
- The "Great Canadian Getaway" grew in popularity as busy dual income families found the need to get away but don't have the time to take a longer holiday.
- Hotels experienced major growth over the decade, as both leisure and business travellers opted for hotel accommodation.
- Seniors were the fastest growing age segment, taking 67% more trips between 1980 and 1990.

Domestic travel is the main generator of tourism in Canada and it is facing challenges. During the late 80's domestic tourism enjoyed expansion, but the situation reversed in 1990 as Canada entered its second major recession in a decade (chart 1). As Canadians are increasingly tempted to travel to destinations outside Canada, especially south of the border, fewer trips are taken at home (table 1). Shifting demographics, fluctuating economic climates and expansion of travel opportunities, are just some of the factors that have altered Canadians travel patterns over the last decade.

Where Have All the Canadians Gone?

Canadians took 5% more overnight journeys in their own country in

1990 than in 1980 (table 1). This domestic growth pales in comparison to the 63% escalation in their international travel activity. In fact, the market share of domestic travel dipped from 86% to 79% (table 1). The United States benefited from the rising flood of outbound Canadians, although overseas locations claimed a larger percentage increase in Canadian traffic. A combination of favourable exchange rates and cheaper gasoline prices no doubt influenced travel to the U.S. during 1990. Although exchange rates were advantageous for Canadians ten years ago, gasoline prices were higher south of the border (charts 2 & 3).

Sameday domestic excursions have not suffered the same losses as overnight travel over the last ten

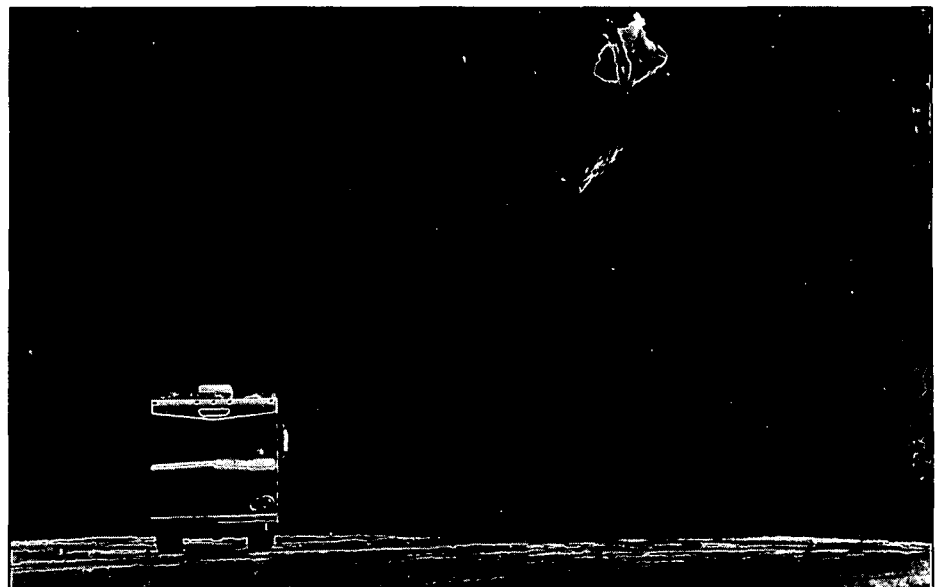
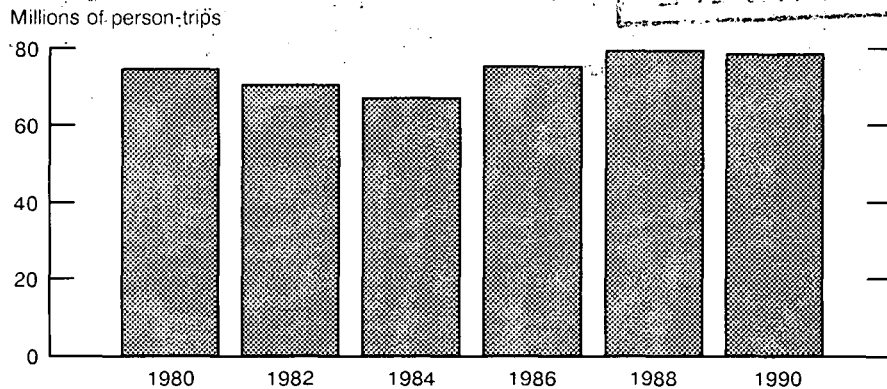
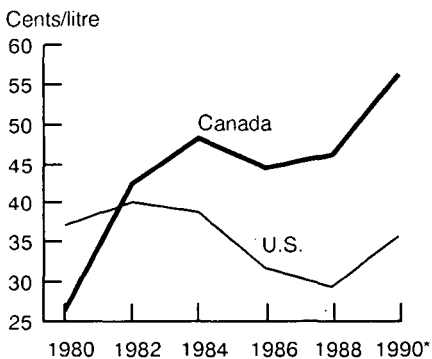


Chart 1
Overnight Domestic Travel



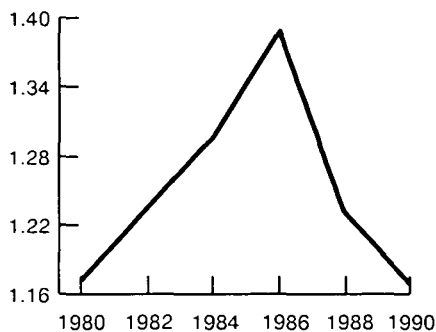
Source: Canadian Travel Survey.

Chart 2
Regular Leaded Gasoline Prices,
Canada vs U.S. including Tax



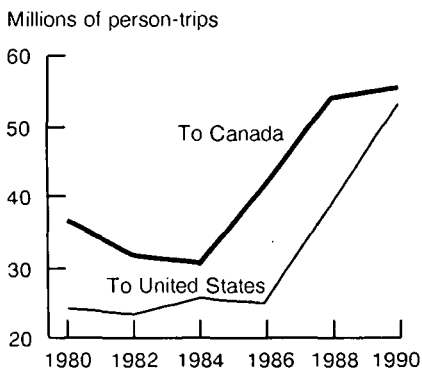
* 1990 (Unleaded Gasoline).
Source: Energy, Mines and Resources Canada.

Chart 3
U.S.\$ in Can\$ per unit



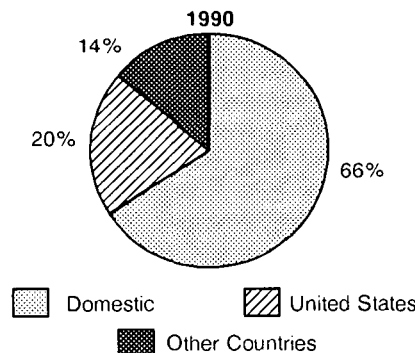
Source: Bank of Canada Review.

Chart 4
Same day Travel By
Canadians



Sources: Canadian Travel Survey; International Travel Survey.

Chart 5
Spending in Canada



Sources: Canadian Travel Survey; International Travel Survey.



Travel-log

Editor's Note...

A CLARIFICATION

The article in the Spring 1991 edition of *Travel-log*, presented in the Case in Point department, was based on a study prepared by a consultant, Chris Holloway, for Transport Canada. The findings contained in this study are not necessarily endorsed by Transport Canada.

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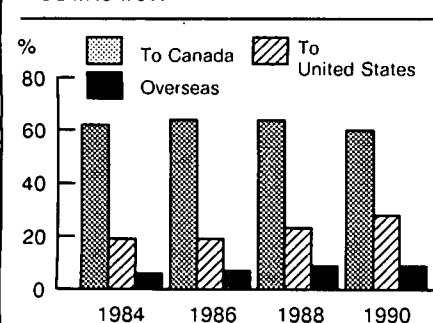
years (chart 4). In 1990 travellers reported 56 million day trips in Canada, compared to 37 million in 1980 (table 1). Excursion travel represented four out of 10 domestic trips in 1990 up from 3 at the start of the decade. Canadians insatiable appetite for travel to the U.S. still grew at an even faster rate: 53 million sameday visits in 1990, skyrocketing from 24 million in 1980. At this increasing rate, sameday travel south of the border may outpace domestic day trips in the 90's.

Despite its shrinking market share, domestic tourism continued in 1990 to account for the bulk of tourism revenues in Canada (chart 5). Of the near \$22 billion spent in Canada during 1990, domestic tourists contributed nearly two-thirds (table 2). Given the importance of the domestic travel market to the Canadian tourism industry and the lack of expansion in the past decade, it is interesting to determine which are the growth areas both in terms of traveller characteristics and in respect of types of travel.

Domestic Travel Participation Drops

When the growth of Canada's population is taken into account, domestic travel participation has actually diminished over the ten-year period (chart 6). In 1990, 60% of Canadians took at least one overnight leisure trip in Canada, compared to 62% in 1984 and a high of 64% during 1986 (table 3).

Chart 6
Leisure Travel Participation by Destination



Source: Canadian Travel Survey.

This little or no growth picture for domestic travel contrasts with the surge of travel to the United States and other countries. Approximately 28% of Canadians headed to the U.S. for an overnight trip, rising dramatically from 22% in 1984. Travel participation overseas has

grown in popularity but not to the same degree.

Domestic travel participation waned across the country with the exception of British Columbia, where participation jumped from 59% to 66%, Saskatchewan and Atlantic provinces (table 4). The

Table 1
Domestic and International Travel By Canadians

Travel by Canadians	Change		Share		
	1980	1990	1980/90	1980	1990
	000s		%	%	
Overnight Travel:	87,035	98,806	14	100	100
Domestic	74,487	78,326	5	86	79
International	12,548	20,480	63	14	21
United States	10,963	17,327	58	13	18
Overseas	1,585	3,153	99	2	3
Sameday Travel:	60,290	108,610	80	100	100
Domestic	36,510	55,504	52	61	51
United States	23,780	53,106	123	39	49

Sources: Canadian Travel Survey; International Travel Survey.

Table 2
Where the Travel Spending Goes

	Share			
	1980	1990	1980	1990
	billions of \$		%	
Spending in Canada:	12.8	21.6	100	100
By Canadians ¹	9.5	14.2	74	66
By International Visitors	3.3	7.4	26	34
U.S.	2.1	4.4	16	20
Overseas	1.2	3.1	9	14
Spending Outside Canada:				
By Canadians	4.6	12.1	100	100
U.S.	2.9	7.8	63	64
Overseas	1.7	4.4	37	36

¹ Excludes money spent in Canada by Canadians when travelling to an international destination. The 1990 Canadian Travel Survey estimated this figure to be \$4.2 billion.

Sources: Canadian Travel Survey; International Travel Survey, Special Tabulations.

Table 3
Canadian Overnight Leisure Travellers

Participation Rate ¹	%			
	1984	1986	1988	1990
Population (15 +)	100	100	100	100
Canadians to any destination	68	71	71	70
Canada	62	64	64	60
United States	19	19	23	28
Overseas	6	7	9	9
Non-travellers	32	29	29	30

¹ The participation rate is based on the Labour Force Survey population which includes Canadians aged 15 and over.

Source: Canadian Travel Survey.

Continued from page 3

drops in domestic participation were particularly acute in Manitoba and Quebec (chart 7a). In contrast U.S. travel participation leaped in every region, especially in B.C. and Manitoba (chart 7b).

Population Winners Gain Travellers

Ontario, Alberta and British Columbia all claimed a larger slice of domestic market share between 1980 and 1990. Their increases in market share may be explained in part by their coinciding higher rates of population growth (table 5). Quebec recorded the largest loss in market share over the decade - 25% to 20%, primarily a result of an erosion of leisure travel in the Quebec market. Business travel was static, not sharing in the 2.8 million growth across Canada. The erosion of domestic leisure travel may in part be related to their increasing travel participation to international locations, especially to the U.S. (table 4).

Table 4

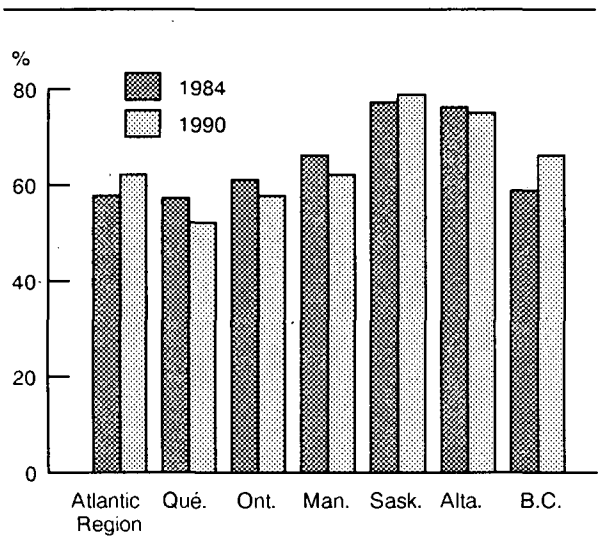
Participation in Overnight Leisure Travel by Province

Province of residence	1984				
	Travellers				
	Population ¹	Any Destination ²	Canada	United States	Overseas
	000s	%	%	%	%
Canada	19,274	68	61	19	6
Atlantic Region	1,708	60	58	8	2
Quebec	5,096	64	57	15	5
Ontario	6,990	69	61	24	8
Manitoba	790	72	66	21	5
Saskatchewan	738	78	77	14	1
Alberta	1,732	80	76	17	7
British Columbia	2,219	67	59	23	7
			1990		
	000s	%	%	%	%
Canada	20,599	70	60	28	9
Atlantic Region	1,774	66	62	18	3
Quebec	5,320	63	52	19	9
Ontario	7,661	69	58	33	10
Manitoba	807	74	62	37	5
Saskatchewan	721	81	79	26	4
Alberta	1,855	79	75	23	6
British Columbia	2,461	78	66	38	13

¹ Refers to the Labour Force Survey population which includes Canadians aged 15 and over.
² Travellers may travel to more than one destination, therefore the sum of the destinations does not equal participation to any destination.

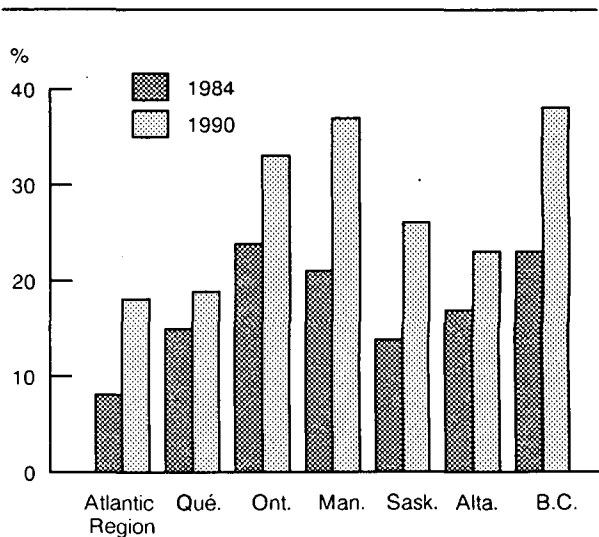
Source: Canadian Travel Survey.

Chart 7A
Domestic Travel Participation by Province



Source: Canadian Travel Survey.

Chart 7B
United States Travel Participation by Province



Source: Canadian Travel Survey.

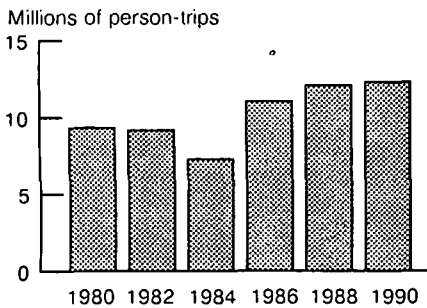
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Business Travel Reaches Record Levels

Business travel provided a major growth area for the tourism industry over the decade, with an advance of 30% over the ten years (table 6). This trend slowed down in 1990 as the economy fell into a recession (chart 8). Most of the improvements took place in Ontario, where business travel mushroomed 63% between 1980 and 1990.

Visits to friends or relatives (VFR) and pleasure travel generated an equal market share in 1990 (39%), marking a change from 1980 when pleasure was more dominant (table 7). However, over the 1980-1990 period, VFR travel grew 15% while pleasure travel shrunk 9%.

Chart 8
Business Overnight Travel Over the Decade



Source: Canadian Travel Survey.

Rubber Tire Market Expands

Canadians strong preference for driving their own vehicle when they travel gained even more momentum over the decade. Leisure travellers penchant for getting behind the wheel was most dominant with 91% of overnight domestic journeys by car (table 8). However, even business travellers elected to drive on close to seven out of ten trips.

Over the decade much of the leisure segment opted away from public transportation (chart 9a). Bus and rail experienced major cutbacks in consumer use over the 80's. Canadians travelled by bus less frequently which resulted in a 2% loss in market share. Even airlines saw a drop in leisure passengers by

Table 5
Share of Overnight Domestic Trips and Population by Province of Destination

Destination	Trips		Population	
	1980	1990	1980	1990
	%		%	
Canada	100	100	100	100
Nfld.	2	2	2	2
P.E.I.	1	1	1	1
N.S.	4	4	4	3
N.B.	3	3	3	3
Quebec	25	20	26	25
Ontario	34	38	36	37
Man.	4	4	4	4
Sask.	6	6	4	4
Alta.	12	13	9	9
B.C.	10	11	11	12

Sources: Canadian Travel Survey; Postcensal annual estimates of population, Cat. No. 91-210.

Table 6
Overnight Travel by Province of Destination

Destination	1980			1990		
	Total	Business	Leisure	Total	Business	Leisure
	000s			000s		
Canada	74,487	9,351	65,135	78,326	12,168	66,158
Nfld.	1,234	177	1,057	1,253	230	1,023
P.E.I.	461	39	422	380	46	334
N.S.	2,634	260	2,374	2,929	493	2,436
N.B.	1,826	262	1,564	2,005	385	1,620
Quebec	18,416	2,173	16,243	15,963	2,201	13,762
Ontario	25,087	2,690	22,397	29,465	4,307	25,158
Man.	3,282	461	2,821	3,273	485	2,788
Sask.	4,630	588	4,042	4,310	625	3,685
Alta.	8,559	1,311	7,248	9,863	1,885	7,978
B.C.	7,645	1,257	6,388	8,788	1,466	7,322

Source: Canadian Travel Survey.

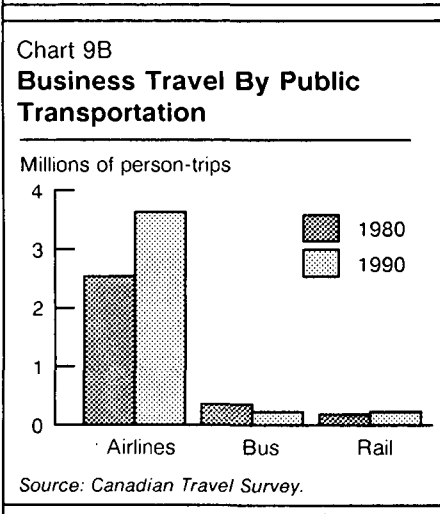
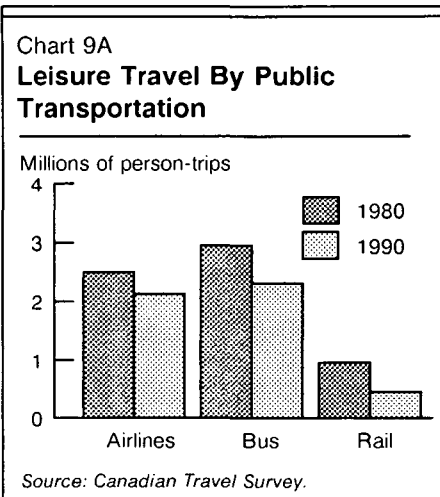
Table 7
Why Canadians Travel

Purpose	Change		Share	
	1980	1990	1980	1990
	000s		%	
Overnight Travel	74,487	78,326	100	100
Leisure	65,135	66,158	87	84
VFR	26,749	30,830	36	39
Pleasure	33,279	30,405	45	39
Personal	5,108	4,923	7	6
Business	9,351	12,168	13	16

Source: Canadian Travel Survey.

Continued from page 5

nearly one in six. However, the air carriers made substantial gain in their market share of business travel that it more than offset their losses in the leisure market (chart 9b). The rail passenger industry managed to hold on to a 2% market share of business travel.



The Great Canadian Getaway
"Getaway travel", "mini-vacations" became familiar jargon in the tourism industry during the 80's. Short holidays have grown in popularity, as consumers feel the need to get away from everyday stresses but do not have the time to take longer holidays. Gone are the days when families with one breadwinner packed up the kids for the annual 2-3 week touring holiday.

Over the 80's the average overnight trip shrank from 4 nights to 3. Canadians were more likely to take shorter leisure trips (1-4 nights) which gained a 2% market

**Table 8
Transportation Usage**

Transportation	Overnight Trips		Change 1980/90	Market Share	
	1980	1990		1980	1990
	000s		%	%	
Leisure Travel	65,135	66,158	2	100	100
Automobile	57,868	60,480	5	89	91
Commercial:	7,268	5,680	-22	11	9
Airplane	2,513	2,125	-15	4	3
Bus	2,974	2,319	-22	5	4
Rail	955	447	-53	1	1
Other	826	787	-5	1	1
Business Travel	9,351	12,168	30	100	100
Automobile	6,195	8,033	30	66	66
Commercial:	3,156	4,135	31	34	34
Airplane	2,538	3,635	43	27	30
Bus	351	231	-34	4	2
Rail	176	206	17	2	2
Other	91	63	-31	1	1

Source: Canadian Travel Survey.

**Table 9
Duration of Leisure Trips**

Duration	Trips		Change 1980/90	Market Share	
	1980	1990		1980	1990
	000s		%	%	
Leisure Travel:	65,135	66,158	2	100	100
Short Trips	53,596	55,294	3	82	84
1 night	13,212	15,332	16	20	23
2 nights	28,766	28,365	-1	44	43
3 nights	8,284	8,488	2	13	13
4 nights	3,333	3,109	-7	5	5
Longer Trips	11,540	10,863	-6	18	16
5-9 nights	6,750	6,957	3	10	11
10+ nights	4,790	3,906	-18	7	6

Source: Canadian Travel Survey.

**Table 10
Duration of Business Trips**

Duration	Trips		Change 1980/90	Market Share	
	1980	1990		1980	1990
	000s		%	%	
Business Travel:	9,351	12,168	30	100	100
1 night	2,881	4,649	61	31	38
2 nights	2,742	3,087	13	29	25
3 nights	1,188	1,734	46	13	14
4 nights	1,025	1,047	2	11	9
5-9 nights	990	1,313	33	11	11
10+	524	337	-36	6	3

Source: Canadian Travel Survey.

►Continued from page 6

share over the 1980-1990 period. One night trips gained the widest appeal throughout the decade for both leisure and business travellers (tables 9 & 10). In contrast, holidays lasting more than 2 weeks lost some demand.

Market for Hotels Expands

The decade proved to be a good one for the hotel industry as it captured a larger share of both the leisure and business travel markets (chart 10). Between 1980 and 1990 the market share of hotels advanced from 7% to 13% of domestic tourist nights (table 11). This was even more pronounced in the expanded business sector which recorded a growth in hotel usage from 32% of nights in 1980 to 53% in 1990 (table 12). Hotel use by leisure travellers jumped from 4% of their nights in 1980 to 7% in 1990 (table 13).

Table 12

Business Travel Accommodation Market Share

Accommodation	Share of nights	
	1980	1990
	000's	
Business nights	30,914	33,318
Business travel:	100	% 100
Hotels	32	53
Friends & Relatives	25	18
Motels	21	17
Other	22	12

Source: Canadian Travel Survey.

Table 13

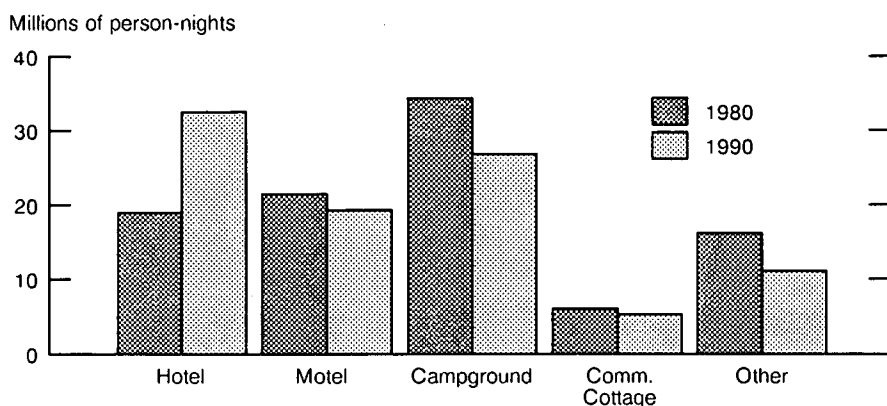
Leisure Travel Accommodation Market Share

Accommodation	Share of nights	
	1980	1990
	000's	
Leisure nights	235,684	220,355
Leisure travel:	100	% 100
Friends & relatives	52	50
Cottage	17	19
Hotel	4	7
Campgrounds	14	12
Motels	6	6
Other	7	6

Source: Canadian Travel Survey.

Chart 10

Leisure and Business Travel By Commercial Accommodation



Source: Canadian Travel Survey.

Table 11

Nights by Accommodation Type

Accommodation	Nights		Change 1980/90	Market Share	
	1980	1990		1980	1990
	000s		%	%	
Leisure & Business Travel	266,598	253,673	-5	100	100
Non-commercial:	169,199	158,775	-6	63	63
Friends & Relatives	129,586	115,919	-11	49	46
Private Cottage	39,613	42,856	8	15	17
Commercial:	81,202	83,702	3	30	33
Hotel	19,058	32,375	70	7	13
Motel	21,605	19,139	-11	8	8
Campground	34,457	26,908	-22	13	11
Commercial Cottage	6,082	5,280	-13	2	2
Other & not stated	16,197	11,195	-31	6	4

Source: Canadian Travel Survey.

Motels, on the other hand managed to hold on to their 8% share, losing some of the business market but attracting more leisure travellers. Trends over the decade were not encouraging for campground owners who saw their market base slip from 13% to 11% of domestic nights (table 11). A shrinking youth population and possibly a lack of interest in camping among the middle age contributed to the decline in camping.

The getaway market or short trips (1-4 nights) was an expanding market opportunity for hotels and motels over the decade. Between 1980 and 1990 leisure travellers staying in hotels or motels recorded 48% more of these trips.

Cottages - Home Away From Home

When Canadians leave the city they are often travelling to second homes. In 1990 Canadian travellers spent 17% of their nights at the cottage, up from 15% ten years earlier. Over the 80's this trend has increased especially among seniors (65+) who accounted for the majority of the increased cottage usage over the decade. Seniors more than doubled the number of nights spent at the cottage between 1980 and 1990. Given their increased leisure time, they now have more flexibility and time to enjoy their cottages.

Canadians still spend most of their nights away from home with friends or family although they seem to be less inclined to do so in 1990. Both business and leisure travellers reduced stays with friends or family.

►Continued from page 7

Baby-boomers Leave Their Mark

One of the single biggest impacts on the travel industry over the decade was the aging of the population, especially among the biggest group of consumers – the baby-boom generation. This generation continues to influence many consumer trends. By the end of the decade, most of the baby-boom generation had graduated from college or university, entered the workforce, walked up the aisle, signed mortgage agreements and started having families. As a result, of some these changing lifestyles, their travel patterns have been altered.

While baby-boomers ranged in age from 15-34 in 1980, they were 25 to 45 years old by 1990. They represented 34% of Canada's population and took 38% of domestic trips (table 14a & b). But compared to the start of the decade they have actually reduced their domestic travel (chart 11). Back in 1980 they took 28 million trips but ten years later they had taken just 25 million. Reduced travel activity was concentrated among the older boomers – those aged 25-34 in 1980 and 35-44 years by 1990 (table 15).

This generation now travels more for business than ever before, boosting business trips by 50%

compared to 1980. They have, on the other hand reduced their leisure trips in Canada. Increased time pressures, changing tastes, shifting priorities may be some of the

reasons for this shift. As well, this generation has substantially increased their travel participation outside the country, especially to the U.S..

Table 14a
Overnight Domestic Leisure Trips by Age

Age	1980		Change 1980/90	Share	
	000s	%		1980	1990
Age - Total	65,135	66,158	2	100	100
< 15	14,593	14,093	-3	22	21
15-24	14,283	9,502	-33	22	14
25-34	13,924	14,426	4	21	22
35-44	7,974	10,524	32	12	16
45-54	6,489	7,335	13	10	11
55-64	4,989	5,530	11	8	8
65 +	2,881	4,747	65	4	7

Source: Canadian Travel Survey.

Table 14b
Population of Canada by Age Groups

Population	1980		Change 1980/90	Share	
	000s	%		1980	1990
Age - Total	23,936	26,584	11	100	100
< 15	5,500	5,560	1	23	21
15-24	4,692	3,859	-18	20	15
25-34	4,056	4,761	17	17	18
35-44	2,837	4,166	47	12	16
45-54	2,471	2,824	14	10	11
55-64	2,099	2,363	13	9	9
65 +	2,282	3,052	34	10	11

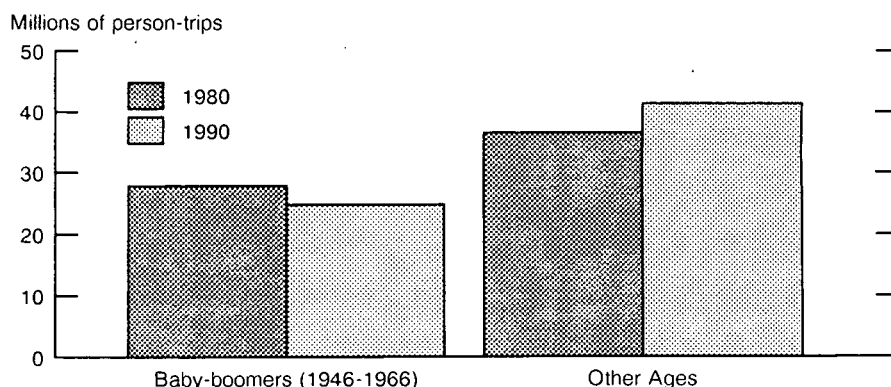
Source: Postcensal annual estimates of population, Cat. No. 91-210.

Table 15
Leisure Travel By the Baby-boom Generation, Then & Now

Then...	1980	
	Trips	Share
	000's	%
All Age Groups	65,135	100
Baby-boomers	28,207	43
15-24	14,283	22
25-34	13,924	21
Other Ages	36,928	57
Now...	1990	
	Trips	Share
	000's	%
All Age Groups	66,160	100
Baby-boomers	24,950	38
25-34	14,426	22
35-44	10,524	16
Other Ages	41,210	62

Source: Canadian Travel Survey.

Chart 11
Leisure Travel By Baby-boomers Over the Decade



Source: Canadian Travel Survey.

Continued from page 8

Seniors Becoming a Hot Market

Seniors were one of the fastest growing market segments over the decade, taking 67% more overnight trips to destinations in Canada in 1990 compared to 1980. Although they represent just 7% of the domestic market, they are one of the few travel segments that is expanding at a faster rate than their population growth. They represented 11% of the Canada's population in 1990, up from 10% a decade ago (table 14a & b).

The growth in market share for this age group was most pronounced for pleasure travel where it doubled. Increases in excess of population growth may be a reflection of a variety of factors such as improved income security, better health, more education and wider geographic dispersion of families; all of which are liable to engender greater enthusiasm for travel by seniors.

Shrinking Youth Market

The youth population (15-24) on the other hand, recorded a disproportionately large decline in travel participation. While their numbers diminished from 20% to 15% of the population, their share of the domestic travel market slumped from 22% to 14% (table 14a & b). Possible explanations could be more time allocated to education and on working to pay for it than by the youth of ten years earlier.

Couples Travelling Versus Families

Over the decade, the growth in travel by couples without young dependent children and singles outpaced that of families. Trips by the family segment slid 6% while travel without kids in tow grew 13% (table 16). The decline in family travel parties was concentrated in the pleasure segment, as VFR trips remained relatively stable. Some of the increase in adult only travel was due to the expanding business segment, although even without the business component, adult trips grew 6%.

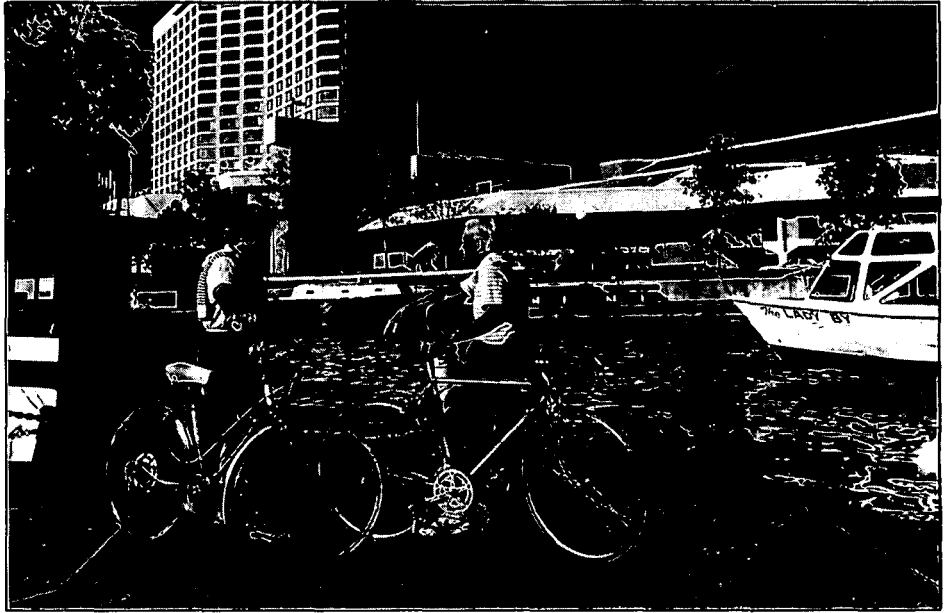


Table 16

Leisure and Business Travel by Party Composition

Party Composition	Trips		Change 1980/90	Share	
	1980	1990		1980	1990
	000s		%	%	
Total	74,487	78,326	5	100	100
Adults only	43,311	49,037	13	58	63
1 adult	22,198	26,643	20	30	34
2 adults	17,634	20,042	14	24	26
3+ adults	3,482	2,353	-32	5	3
Adults with children	31,171	29,286	-6	42	37
1 adult with children	7,589	7,852	3	10	10
2 adults with children	20,282	19,329	-5	27	25
3+ adults with children	3,304	2,106	-36	4	3

Source: Canadian Travel Survey.

Table 17

Changing Education Credentials

Education	Trips		Change 1980/90	Share	
	1980	1990		1980	1990
	000s		%	%	
Leisure:	65,135	66,158	2	100	100
College Diploma	6,953	14,917	115	11	23
University Degree	6,596	8,418	28	10	13
Other	51,587	42,823	-17	79	65
Business:	9,351	12,168	30	100	100
College Diploma	1,091	3,532	224	12	29
University Degree	2,425	4,180	72	26	34
Other	5,835	4,456	-24	62	37

Source: Canadian Travel Survey.

Continued from page 9

More University and College Graduates

Travellers in 1990 had more education credentials than those of 10 years earlier, fuelled largely by younger baby-boomers who graduated throughout the 80's. This was especially true among the business travel segment where close to two-thirds held diplomas or degrees in 1990 compared to less than half at the commencement of the decade (table 17). University and college graduates took almost half of the leisure trips in 1990 an expansion from 21% in 1980.

Favourite Travel Pursuits

Canadians spend a lot of their travel holidays visiting with friends or family, however this is not too surprising given that VFR was cited as the main reason Canadians left home in 1990 (40%). Domestic travellers also love to shop (table 18), as this is an activity on 31% of their trips. Taking in local sights was the next most common pursuit. Dining at expensive restaurants kept 16% of travellers busy, while going to a club or dancing was cited by 11%.

Many travellers also prefer a more active lifestyle with sports and outdoor activities ranking as the fourth most popular activity away from home. Overall swimming attracted the greatest number of sports participants. Trying to reel in the big one appealed to the next largest group (8%), while attaining a hole in one was the goal of 3% of travellers.

Summertime Preference Persists

Canadians still prefer to take their leisure trips during the summertime (chart 12). This tendency has remained unchanged over the decade (table 19). Travel during the spring grew at a faster rate than all other seasons, while the winter months lost some appeal.

Business travellers shifted the bulk of their trips from the summertime to the spring over the 1980-1990 time period (chart 13). More business trips were also taken in the winter which resulted in a shift from third to second most popular time to travel (table 19).

Table 18
What Travellers Do When They Travel

Activities	1990	
	Trips	Participation
	000s	%
Overnight Travel	78,326	100
Visiting friends or relatives	48,117	61
Shopping	24,559	31
Sightseeing	15,866	20
Sports or outdoor activities	14,288	18
Dining at high quality restaurants	12,493	16
Nightlife & entertainment	8,446	11
Festivals or events	5,689	7
Zoos, Museums, Natural displays	4,661	6
Sports events	3,906	5
Provincial park	3,806	5

Note: Travellers may participate in more than one activity, therefore the sum of activities exceeds the total person-trips.

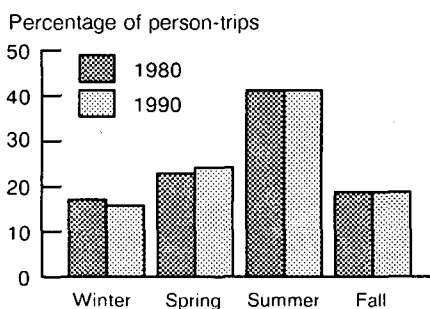
Source: Canadian Travel Survey.

Table 19
Seasonality of Domestic Travel

Season	Trips		Change 1980/90	Share	
	1980	1990		1980	1990
	000s person-trips		%	%	
Leisure:	65,135	66,158	2	100	100
Winter	11,246	10,762	-4	17	16
Spring	14,937	16,153	8	23	24
Summer	26,361	26,960	2	41	41
Fall	12,592	12,283	-2	19	19
Business:	9,351	12,168	30	100	100
Winter	2,269	3,176	40	24	26
Spring	2,380	3,368	42	25	28
Summer	2,593	2,985	15	28	24
Fall	2,109	2,639	25	23	22

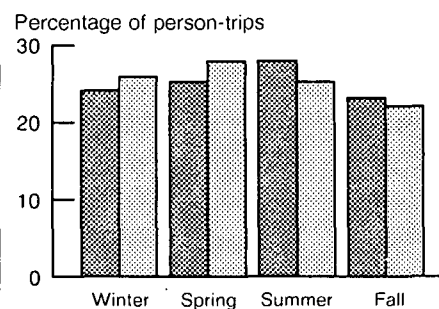
Source: Canadian Travel Survey.

Chart 12A
Seasonality Share of Leisure Travel



Source: Canadian Travel Survey.

Chart 12B
Seasonality Share of Business Travel



Source: Canadian Travel Survey.

▶Continued from page 10

Prospects for the 90's

Traditional domestic touring holidays have been replaced by shorter getaway holidays. However, an increasing number of holidays are taken across the border as Canadians combine shopping and a mini-holiday.

Fewer domestic leisure travellers are flying to destinations across Canada, perhaps because they are being tempted by competitive international packages. More and more Canadians are driving to their destinations and for most of them, destinations in the U.S. are within easy reach.

Extending more business trips into leisure trips may offer expanding opportunity for the industry.

Baby-boomers will continue to dominate and influence travel trends over the next decade as they enter middle age. With dual income earners persisting, time will continue to be an important criteria in travel planning. Travel products that can captivate their needs and desires will flourish.

The already rapidly growing seniors market will gain increased recognition, especially as the baby-boom generation approaches this age bracket. By the year 2000, the oldest of the baby-boomers will celebrate their 55th birthday. The rising education level of Canada's population has resulted in a more sophisticated traveller that is increasingly discerning in travel selection. Opportunities exist for knowledge seeking trips that offer an educational dimension such as learning local history, culinary traditions, nature or gardening.

The rising level of fitness across all age groups is another factor in travel trends. Travel products that offer physical opportunities have expanded over recent years. Golf is touted as being the sport of this decade and will likely play a larger role in generating travel.

Canada's diversifying population cultural mix will add new dimensions to travel marketing as well as an additional challenge to encourage travel within Canada and not to international locations.

Adventure tourism and ecotourism are relatively new travel products and will also be significant growth areas. Canada has a vast wealth of these potential travel opportunities that would appeal to both domestic and international visitors.

The domestic tourism industry has many challenges over the next decade. Travellers are seeking new travel experiences and destinations.

Witness the growing number of Canadians that have already travelled to Europe and those that are exploring more remote parts of the globe, such as Asia.

Keeping up with these changing consumer tastes, competition etc. will be a challenge in this decade. Trends over the past decade point to some potential areas that can perhaps be strengthened.

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1990

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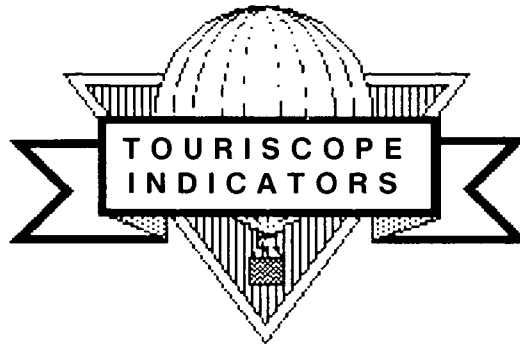
- **Domestic Travel, 1990 Edition**

National and provincial domestic travel results, to be presented in the 1990 edition of Catalogue No. 87-504 which will be available later this fall.
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Statistics Canada
R.H. Coats Building - 17th Floor
Ottawa, Ontario
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		First Quarter 1991	Percentage Change	
			Previous Quarter	Previous Year
VISITORS TO CANADA				
From United States	T	5,376	-18.6	-0.5
Overnight visits(p)	T	1,445	-26.3	1.5
By auto	T	951	-27.0	5.8
From Overseas	T	394	-27.8	2.1
Overnight visits(p)	T	354	-27.9	--
Top Seven Countries				
Japan	T	56	-18.8	-1.8
United Kingdom	T	55	-36.8	5.8
Germany(1)	T	28	-22.2	7.7
France	T	28	-24.3	16.7
Hong Kong	T	22	10.0	-12.0
Australia	T	15	-28.6	--
Italy	T	9	-43.8	--
CANADIANS OUTSIDE CANADA				
To United States	T	16,737	-2.9	17.8
Overnight visits(p)	T	3,715	3.5	6.3
By auto	T	2,382	-3.4	23.6
To Overseas	T	875	45.3	-14.5
INDUSTRY SECTOR				
Airline passengers (Level I)	T	4,742	0.7	-10.9
Airline passenger-km (Level I)	M	9,584	-9.1	-20.9
Inter-city bus passengers	T	3,467	-4.4	-2.8
Restaurant receipts	M	3,681	-13.8	-10.7
PRICES				
1981 = 100 (not s.a.)				
Travel price index		179.8	3.5	10.3
Consumer price index		165.8	2.9	6.5
Restaurant meals		174.7	7.7	12.0
Inter-city transportation		233.0	9.4	22.5
Gasoline		165.7	-7.8	9.7
ECONOMIC				
Gross domestic product, 1986 prices (s.a.)	M	496,862	-1.5	-3.0
Amusement and recreation	M	4,562	-2.5	-1.8
Accommodation and food services	M	11,933	-6.0	-10.9
Personal disposable income per capita (s.a.)		17,288	0.1	1.2
LABOUR FORCE				
Labour force (s.a.)	T	13,697	-0.3	0.5
Unemployed	T	1,387	10.8	35.8
Employed	T	12,310	-1.5	-2.3
Accommodation and food services (not s.a.)	T	716	-2.3	-5.5
EXCHANGE RATES				
In Canadian Dollars:				
American Dollar		1.1558	-0.4	-2.3
British Pound		2.2058	-2.3	12.5
Japanese Yen		0.008646	-2.6	8.1
German Mark		0.7558	-2.3	8.0
French Franc		0.2222	-3.1	7.7
Mexican Peso		0.000390	-1.8	-10.1
(M) Millions. (T) Thousands. (s.a.) seasonally adjusted. (p) preliminary. (1) Germany-W. in 1990				