



Travel-log



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Older Canadians: A Market of Opportunity

By Laurie McDougall and Cam Davis

They used to be called simply, *Seniors*. Well move over *Yuppies*, here come the *Suppies* (senior urban professionals), *Rappies* (retired affluent professionals), *Woofs* (well off old folks), *Opals* (older people with active lifestyles) and *Grampies* (growing retired active monied people in an excellent state). As their younger counterparts, older Canadians (age 55 and over) represent an extremely diverse multi-segmented consumer group. For the travel industry, knowing more about their needs, characteristics, are essential in order to capture this widely expanding market.

Fastest Travel Growth Over the Decade

The industry has good reason for paying more attention to this group. They claimed the largest percentage increase in travel compared to all other age groups, especially for international locations (table 1). Older adults took 17% of the all trips in 1990, up from 13% at the beginning of the decade (chart 1 & table 2). Their increase in trip taking far outpaced their population growth of 22% (table 3).

"Happy 55 plus Birthday To You..."

Increasingly Canadians will be singing "*Happy 55 plus birthday to you*" - as those entering this older age group flourish (chart 2). Over 5.5 million Canadians will have celebrated their's this year. Next year 245,000 more Canadians will reach their 55th birthday. Ten years from now (2001), when the first baby-boomers turn 55, almost 6.9 million Canadians will be in their senior years (table 3).

Older adults, which now claim 21% of the population, are projected to represent 36% by 2031. But more startling is the projected rapid growth among adults aged 70 and over, which will blossom from 8% of the population to 17% in 2031 (table 3). For the travel industry this is important factor as the needs of older travellers are somewhat different from those that are younger.



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Table 1
Travel by All Canadians Versus Older Canadians

Destination	All Ages			Older Canadians (55 +)		
	1980	1990	Change 80/90	1980	1990	Change 80/90
	000s person-trips		%	000s person-trips		%
All Destinations	87,340	96,647	11	11,484	16,098	40
Domestic	74,487	78,326	5	8,708	11,200	29
International ¹	12,853	18,321	43	2,776	4,898	76
United States	11,268	15,325	36	2,437	4,132	70
Other Countries	1,585	2,996	89	339	766	126

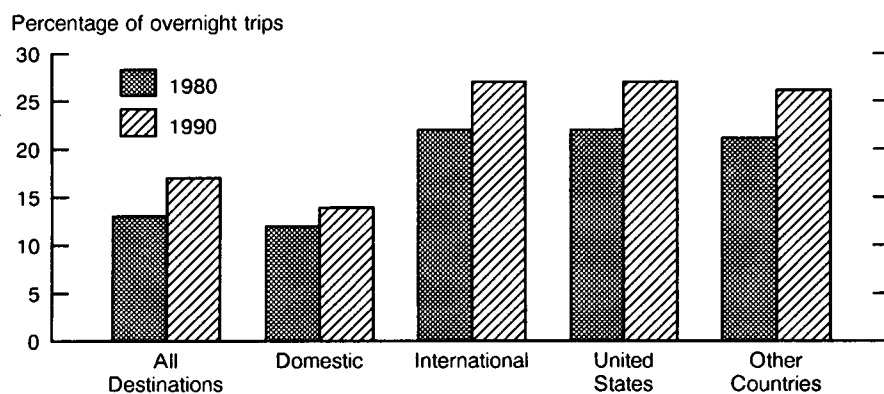
¹ International data estimates pertain to 1989.
 Source: Canadian Travel Survey, 1980 and 1990; International Travel Survey, 1980 & 1989.

Table 2
Older Canadians Share of Travel by Destination

Destination	1980			1990		
	Total	Under 55	Over 55	Total	Under 55	Over 55
All Destinations	100	87	13	100	83	17
Domestic	100	88	12	100	86	14
International ¹	100	78	22	100	73	27
United States	100	78	22	100	73	27
Other Countries	100	79	21	100	74	26

¹ International data estimates pertain to 1989.
 Source: Canadian Travel Survey, 1980 and 1990; International Travel Survey, 1980 & 1989.

Chart 1
Share of 55 Plus Travellers by Destination



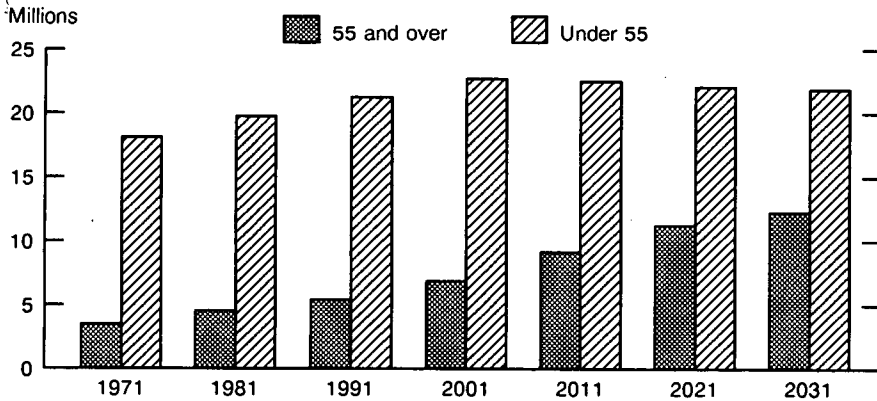
Sources: International Travel Survey, 1980 & 1989; Canadian Travel Survey, 1980 & 1990.

Continued from page 1

Now that the baby-boom generation is busy coping with raising families, paying off mortgages and working, travel becomes a bit more difficult. Shifting focus to the older generation appears to be a potentially lucrative one in light of the existing and projected trends.

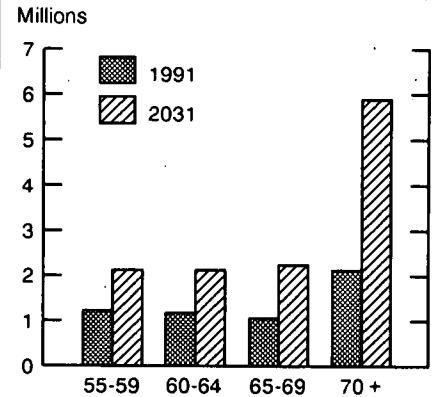
Increased Time and Money
 Today's older adults are reportedly more healthy, have more active lifestyles and are retiring at an earlier age. They owe financial institutions less money than most Canadians, since many have paid off their mortgages. By 1990, eight out of ten mature home owners had burned their mortgages

Chart 2
The Greying Phenomenon



Source: Population Projections for Canada, Cat. No. 91-520: Projection No. 3.

Chart 3
Ageing of Older Adults



Source: Population Projections for Canada, Cat. No. 91-520: Projection No. 3.

Table 3
Population By Age Group

Age Group	1981	1991	2001	2011	2021	2031
000s						
Total Population	24,343	26,807	29,528	31,690	33,306	34,083
Under 55	19,823	21,271	22,664	22,612	21,994	21,758
Over 55	4,520	5,536	6,864	9,078	11,312	12,325
55-59	1,180	1,212	1,594	2,188	2,383	2,090
60-64	979	1,166	1,283	1,965	2,343	2,119
65-69	844	1,056	1,139	1,502	2,048	2,221
70+	1,517	2,102	2,849	3,424	4,539	5,895
Share of Population	100	100	100	100	100	100
Under 55	81	79	77	71	66	64
Over 55	19	21	23	29	34	36
55-59	5	5	5	7	7	6
60-64	4	4	4	6	7	6
65-69	3	4	4	5	6	7
70+	6	8	10	11	14	17

Source: Population Projections for Canada, Cat. No. 91-520: Projection No. 3.

Continued from page 2

compared to just one-third for all other ages (chart 4). This market therefore has more disposable income and time to travel.

International Travel

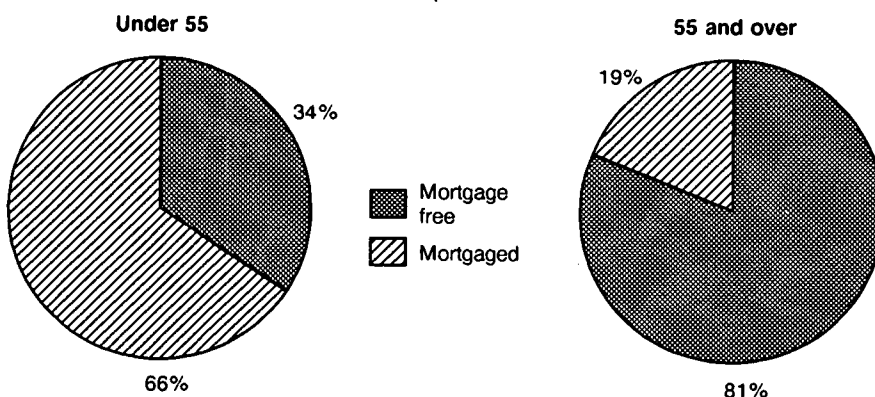
"When I Retire I Want to Travel Around the World"

Upon approaching retirement, older Canadians are often heard to say that they want to travel to distant or exotic places. Their one outstanding goal in life is to see the world while they still have their health. Reduced family responsibilities and greater disposable income allows this life goal to become reality. Previous milestones such as marriage, children, home purchase and mortgage payments have been accomplished and the time to travel outside of Canada is now practical. Those who are retired or at least empty nesters are in an ideal situation to travel further and longer than the traditional two or three week vacations.

International Trips Grow In Popularity

Older adults are exploring faraway destinations at a faster rate than the rest of Canadians. Between 1980 to 1990, there was a 40% increase in trips taken by older Canadians to all destinations

Chart 4
Home Owners With and Without Mortgages



Source: Household Facilities by Income and Other Characteristics, 1990, Catalogue No. 13-218.

Continued from page 3

compared to 11% for the entire population. While most trips taken by Canadians aged 55+ are domestic, foreign destinations are attracting greater numbers. Over the 1980's, international trips expanded 76% which contrasts with a much lower growth for domestic travel (table 1). The share of international locations has increased from 24% to 30% of all travel by older adults. In comparison, the proportion of international trips for younger Canadians advanced from 15% to 19% (chart 5).

United States Most Popular Host

The United States remains the most popular destination for older Canadians. However, compared to other destinations, the States has slowly lost market share: 88% in 1980 to 84% in 1989. In spite of losing market share, the 70% growth in travel by older Canadians to the United States is well above average growth when compared with the 36% increase for all ages (table 1). In contrast the number of older Canadians choosing destinations around the world jumped 126% from 339,000 to 766,000 in 9 years.

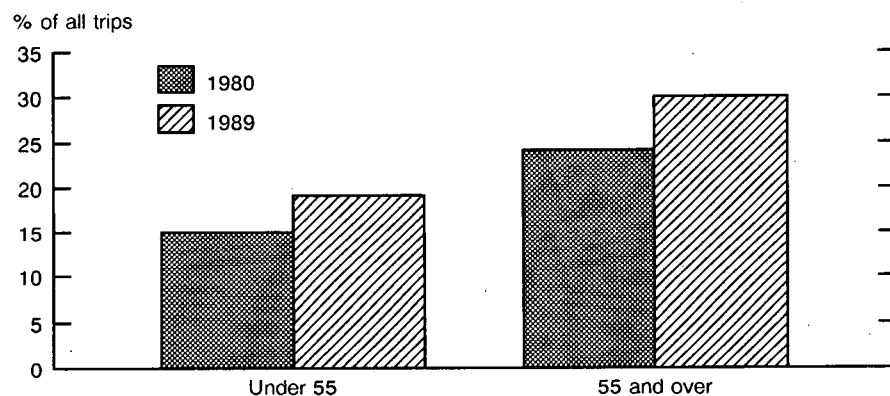
I Love New York & Florida

The level of popularity for individual States has not changed dramatically over time for older Canadians. Ten States attract more than half the 55+ group (table 4), with New York and Florida having the biggest appeal. Over the 80's New York replaced Florida for the #1 position. In terms of market share, both States claimed about one out of every ten older Canadians visiting the United States in 1989.

Alabama Is On Their Minds

Some States are more popular among the older set than younger travellers. In fact, older Canadians comprise almost half or more of Canadians travelling to six States in 1989 (table 5). Alabama hosts the highest share

Chart 5
Share of International Trips by Age



Source: International Travel Survey.

Table 4
State Visits by Older Canadians

State	1980	1989	Change 80/89 %	Share	
	000s			1980	1989
Total All States	4,085	7,292	79	100	100
Top Ten States	2,326	4,096	76	57	56
New York	391	772	97	10	11
Florida	421	749	78	10	10
Washington	375	676	80	9	9
Michigan	185	371	101	5	5
Maine	164	284	73	4	4
Nevada	177	273	54	4	4
California	176	254	44	4	3
Georgia	150	247	65	4	3
Ohio	177	241	36	4	3
Pennsylvania	110	229	108	3	3

Note: When a traveller spends a night in a State, this is counted as one visit. Therefore, visits do not necessarily refer to final destination, but may in some cases be a stopover en route to southern locations.

Source: International Travel Survey, special tabulations.

followed by Kentucky and then New Mexico. New Jersey receives the lowest proportion of older travellers (20%).

Preference for Driving

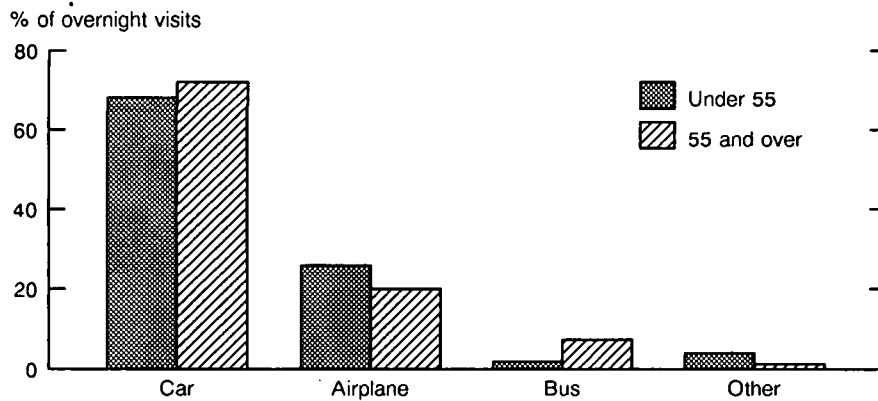
With more time on their hands, the vast majority of over 55+ travellers drive to the United States (chart 6). This does not differ dramatically from their younger counterparts who took their car 68% of the time. Older Canadians are not as likely to board a plane to the U.S. as younger adults. On the other hand, they have a greater tendency to travel by bus than those under 55.

Table 5
Share of 55+ Visits Versus Rest of Population

State	1989		
	Total	Under 55	Over 55
		%	
Alabama	100	39	61
Kentucky	100	44	56
New Mexico	100	45	55
Florida	100	47	53
Arkansas	100	51	49
Tennessee	100	51	49

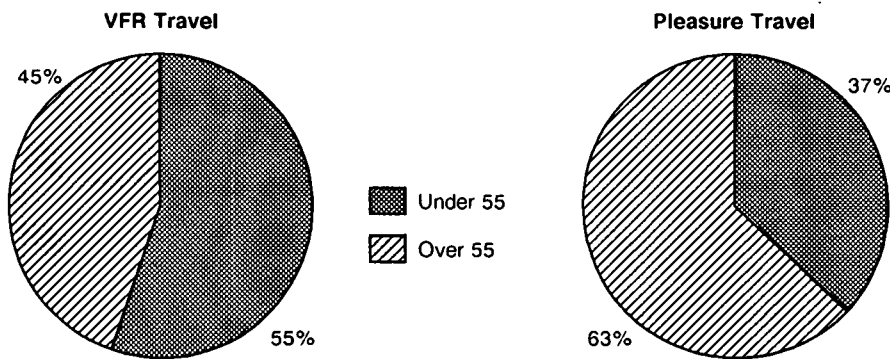
Source: International Travel Survey, special tabulations.

Chart 6
Travel to the U.S. by Mode



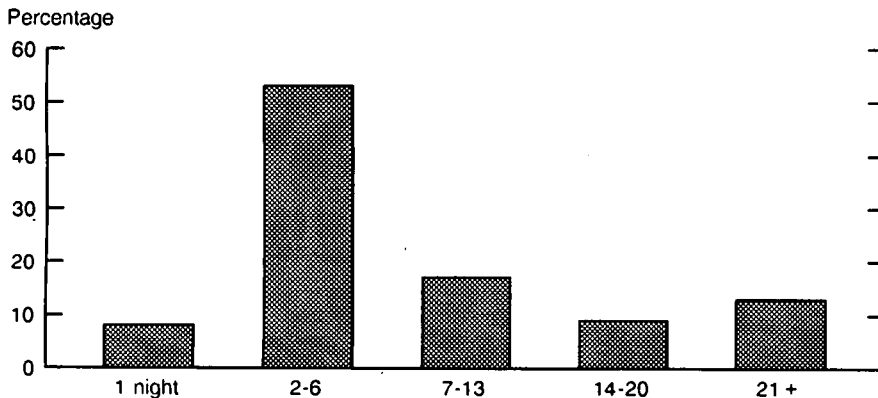
Source: International Travel Survey, 1989.

Chart 7
U.S. Trips by Purpose and Age



Source: International Travel Survey, 1989.

Chart 8
55 Plus Travel to U.S. by Duration



Source: International Travel Survey, 1989.

Continued from page 4

Pleasure Travel Strong

Most Canadians both older and younger are travelling to the United States for pleasure followed by visiting friends or family. In 1989, almost 2.5 million seniors declared pleasure travel as their main purpose, while just under a million travelled to be with friends or family living in the States. For all U.S. bound travellers who stated VFR as the reason for their visit, 45% were older Canadians whereas they made up 63% of the pleasure group (chart 7).

Shorter Not Longer Trips are the Rule

The image that older Canadians flee the severe winter and stay considerable length of time in southern U.S. states is not true for most. For all overnight visits to the United States by older Canadians, only 13% remained over 21 days (chart 8). Over 50% of trips lasted 2-6 nights, which suggests relatively short stays. With recently announced increased health insurance for Ontario residents, many older Canadians will return home sooner to avoid substantial increases in costs. Some may lose the privilege of qualifying for medical health insurance at all.

Older Canadians are Still Going "Over There"

Throughout the 80's, more and more Canadians have been sending postcards from locations around the world, but especially from the U.K. and Europe. Travel to the U.K. exclusively jumped 113% (table 6). The U.K. in combination with travel to Europe showed an 82% rise while solely European destinations mushroomed 173% over the decade.

The United Kingdom attracts 19% of the 1.1 million overseas country visits, almost twice as large as the Caribbean (10%) and 7% for West Germany and France (table 7). The United Kingdom attracts a much higher proportion of older Canadians (table 8). Older

Table 6
Travel to Other Countries by 55 +

Destination	1980	1989	Change 80/89
	000s		%
Total Other Countries	339	766	126
U.K.	70	149	113
U.K. & Europe	33	60	82
Europe only	78	213	173
Caribbean	79	100	27
Asia	12	40	233

Source: International Travel Survey, special tabulations.

Table 7
Top Ten Most Frequently Visited Countries by 55 +

Country	1989
Total Country/Regions Visits	100
U.K.	19
Caribbean	10
West Germany	7
France	7
Mexico	6
Netherlands	5
Switzerland	4
North Asia	3
South America	3
Australia	3

Source: International Travel Survey, special tabulations.

Table 8
Proportion of Older Canadian Visitors To Selected Countries

Country	1989		
	Total	Under 55	Over 55
U.K.	100	66	34
Denmark	100	69	31
France	100	78	22
West Germany	100	71	29
Italy	100	76	24
Netherlands	100	70	30

Source: International Travel Survey, special tabulations.

Continued from page 5

adults also make up an important share of travel to Denmark, Netherlands and West Germany. In comparison 22% of Canadian visitors to France in 1989 were aged 55 + (table 8).

Bon Voyage

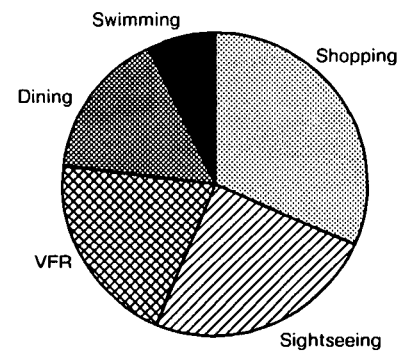
Since 1989, the number of Canadians who took a cruise more than doubled from 48,000 in 1980 to 114,000 in 1989. However, for older Canadians the numbers more that tripled from 15,000 in 1980 to 54,000 in 1989. A large part of the growth is attributed to those over 65, where there was more than a threefold increase and a 194% expansion for the 55-64 group.

Cruise ships cater more to the specific needs of older Canadians. In 1980, older Canadians made up less than one-third of all cruise ship travellers. In 1989, the proportion had climbed to almost half. Clearly medical, therapeutic, cultural and sport activities will be directed to older Canadians. Special niche trips such as grandparent/children cruises may be popular in the future.

Older Canadians Are Not Sitting Pretty

Many people who think that seniors participate in different or fewer activities compared to younger Canadians will be surprised to learn that the top six activities while on an international trip are identical for those under 55 as for those over 55. The image of sedentary seniors is far

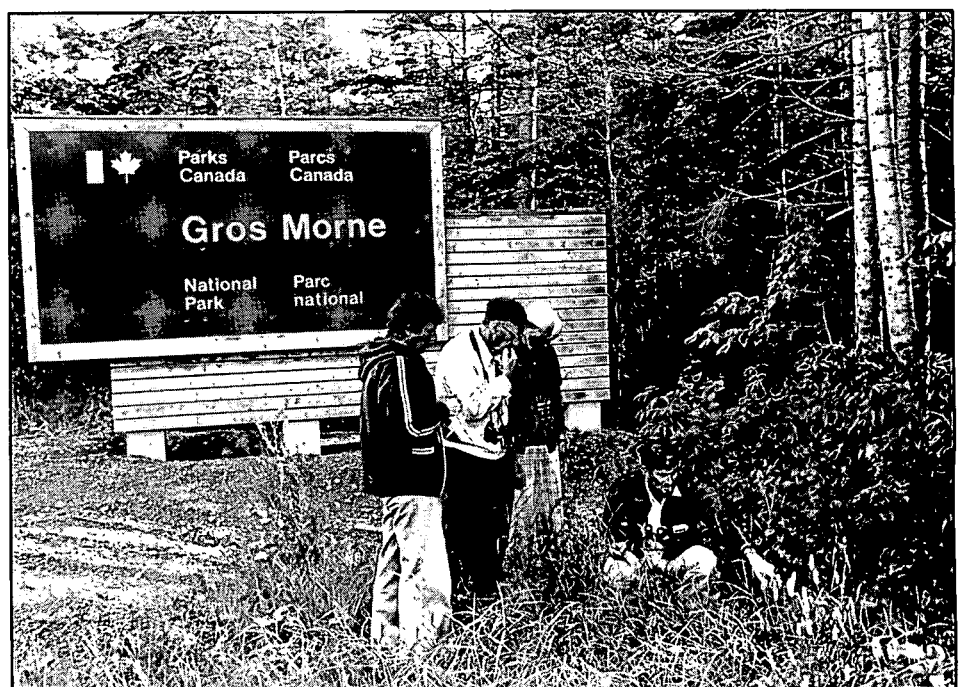
Chart 9
Top Five Activities by 55 Plus



Source: Canadian Travel Survey, 1990.

from reality. Shopping seems to be a universal past-time of international travellers followed by sightseeing (chart 9).

Visiting friends and relatives is third on the list followed by fine dining then nightlife and entertainment. Swimming was the sixth most popular activity. The ordering of participation in these activities did not change regardless of which age group over 55. Like most everyone, seniors like to spend money shopping and they want to be active while on their travels outside the country.



Domestic Travel

At a time when the tourism industry is suffering from a lack of growth in overnight domestic leisure travel, it is encouraging that older Canadians are taking more leisure trips in Canada, 32% over the decade, compared to a drop of 2% for all other ages. Day tripping has become especially popular, escalating 90% over the ten year period. Nights away from home have not kept up the same rapid pace, increasing 12% over the 1980-1990 period (table 9).

Domestic Travel Share Expands

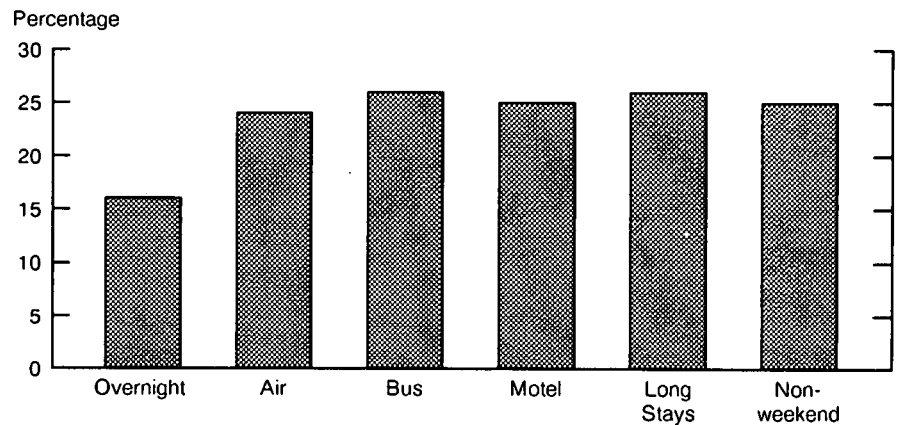
Over the decade, their share of overnight leisure travel rose from 12% to 16% (table 9). Although this is still below their 21% share of Canada's population. When looking at different sub-segments of the travel market they claim more prominence (chart 10). In 1990 they took 24% of air and 26% of bus trips. Their stays in motels accounted for a 25% share of leisure motel nights. Since they have greater flexibility as to when they can travel, a higher proportion of holidays are non-weekend (25%) and involve longer stays.

Travel Participation Slows

About half of the senior population took an overnight domestic leisure trip during 1990 compared to 64% for all other travellers (chart 11). As with the rest of the population, travel participation rose through the 80's but dropped off in 1990. In the case of the mature group though, their domestic participation actually slipped to its lowest level in 1990.

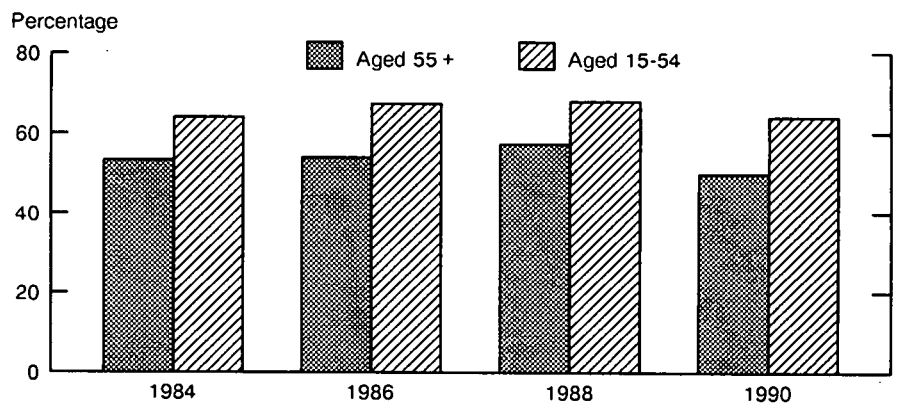
With advancing age there is corresponding decline in senior travel participation. By age 75+ participation drops to 39% (chart 12). On a more positive note -- the 75 and over maintained their domestic travel participation in 1990 compared to 1984 levels.

Chart 10
55 Plus Share of Selected Travel Segments



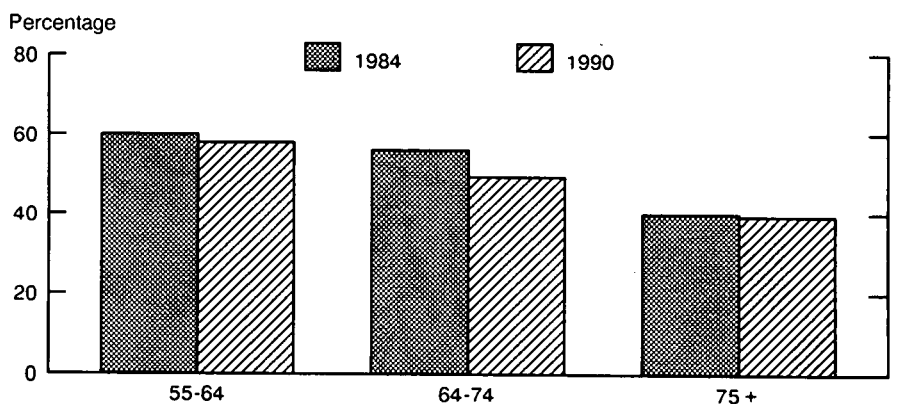
Source: Canadian Travel Survey, 1990.

Chart 11
Domestic Leisure Travel Participation by Age



Source: Canadian Travel Survey.

Chart 12
55 Plus Domestic Travel Participation



Source: Canadian Travel Survey.

Table 9

Domestic Leisure Travel by Age Groups

Domestic Leisure Travel	1980	1990	Change	Share	
			80/90	1980	1990
	000s		%	%	%
All Ages					
Total trips	90,897	109,000	20	100	100
Overnight	64,581	66,074	2	100	100
Sameday	26,316	42,926	63	100	100
Nights	232,870	220,054	-6	100	100
Under 55					
Total trips	79,354	91,623	15	87	84
Overnight	56,772	55,805	-2	88	84
Sameday	22,582	35,818	59	86	83
Nights	192,183	174,626	-9	83	79
55 and over					
Total trips	11,543	17,377	51	13	16
Overnight	7,809	10,269	32	12	16
Sameday	3,734	7,108	90	14	17
Nights	40,687	45,428	12	17	21

Source: Canadian Travel Survey, special tabulations.

Table 10

Mature Travel Market By Age

Age Group	1980	1990	Change	Share	
			80/90	1980	1990
	000s		%	%	%
Total 55 +					
55-59	7,808	10,268	31.5	100	100
60-64	3,139	2,918	-7.0	40	28
65-69	1,821	2,607	43.2	23	25
70 +	1,458	2,302	57.9	19	22
	1,390	2,441	75.6	18	24

Source: Canadian Travel Survey, special tabulations.

► Continued from page 7

Big Spenders

In 1990 older travellers spent an average of \$136 when they took an overnight leisure trip in Canada versus \$106 for all other travellers. For the travel industry that represented 1.4 billion in overnight leisure travel spending. Transportation costs consumed the largest chunk of their travel spending (39%). Wining and dining costs were a quarter of spending. Packaged holidays represented 14% of the \$1.4 billion spent by the mature group, compared to 6% of the travel budget of the under 55s. Commercial lodging establishments received 13% from the mature traveller.

In the Summertime

The majority of older travellers prefer to travel when most other Canadians do -- during the summer and in particular, the month of July (chart 13). The spring is the next busiest season, with June being the highest volume. The fall, when the kids are back to school, the summer crowds are gone and off-season rates begin, represents 20% of mature travel. Winter travel in Canada is the least favored season as this becomes one of the busiest times for travel to the Sun States.

Friends and Family Important

Family and friends motivate many Canadians to travel and this motivation becomes even stronger with age. During 1990, half of 55+ leisure trips were to visit friends or family (VFR), while 40%

were for pleasure or holiday reasons. Personal trips such as going to a lawyer, a funeral, medical appointment, accounted for the remainder.

The older segment (70 and over) revealed a greater likelihood of taking a VFR journey. On the other hand, the younger set (55-59) were more likely travelling for pleasure than for visiting -- 50% versus 41%.

Hotels Gaining Bigger Share

Hotels are putting out the welcome mat with offers of seniors discounts, off-peak bargains and special packages. Some of these efforts must have paid off as the hotel sector benefitted the most from increased travel by those over 55 (chart 14a). Front desk clerks registered 74% additional nights by the older age groups, the largest increase among the commercial lodging (table 11).

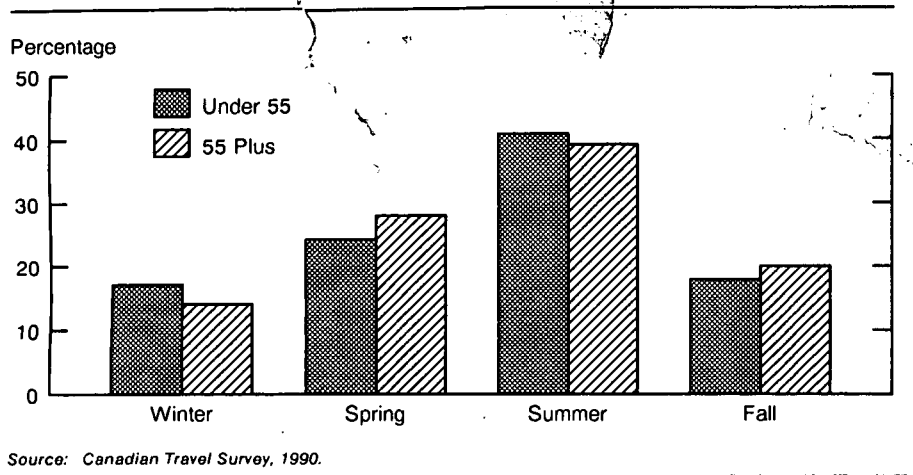
Taking a room in a motel was the most popular commercial lodging choice in 1990, however motels did not see as large an influx of guests as hotels. Roughing it in the great outdoors with a tent or RV is losing some appeal, as camping nights dropped 5% (table 11). The vast majority of their nights are still spent with friends or family, or at the cottage (charts 14b & 15). Spending time at the cottage was more prevalent in 1990 compared to 1980 probably due to increased retirement which makes going to the cottage for longer periods of time more feasible.

Slightly Longer trips

Older travellers stay an average of 4.4 nights compared to 3.1 for all other travellers. And length of stay increases with age, rising to 5.2 nights for the 70 and over group.

In 1990 they were away from home one night on 22% of their trips which was similar to other travellers (chart 16). They were less inclined to be away two nights or travelling on the weekend than their younger counterparts. One out of every ten trips lasted ten nights or more versus just 5% of travel by all other ages.

Chart 13
Seasonality of Travel by Age

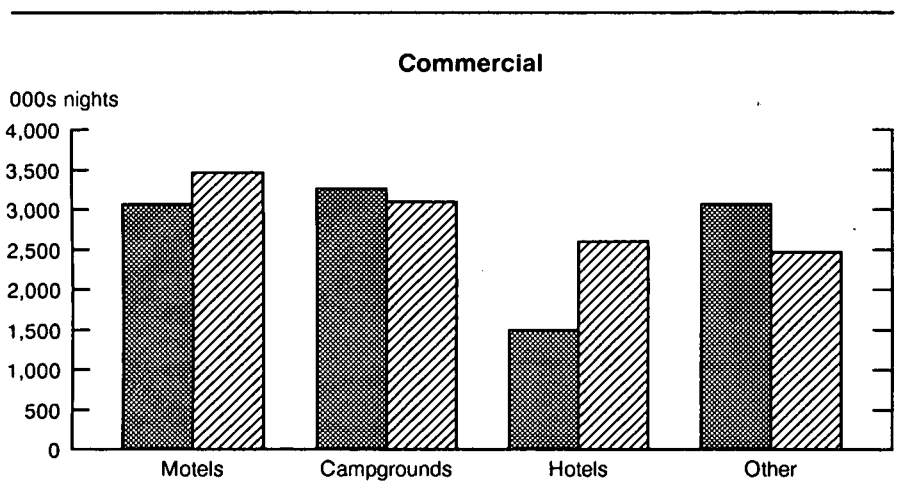


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The Empty Nest

Now that older Canadians are at the "empty nest" lifecycle stage, they are less restricted in planning their holidays. They don't have to worry about co-ordinating schedules with their children or accommodating their needs and tastes as well as their own. Couples dominate the mature travel segment with 63% stating they travelled with their partner (chart 17). On the other hand just 22% of those under 55 travelled as couples only. Those 55 and over are also more likely to be travelling on their own or accompanied by a friend or relative.

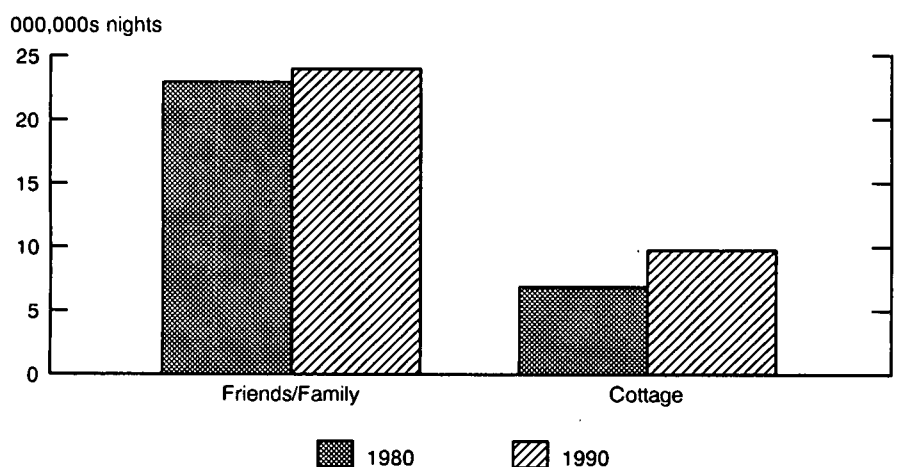
Chart 14a
Accommodation Use by 55 Plus Travellers



More Singles

Although the majority of older travellers are married (75%), singles are becoming a more noticeable group. Over the decade travel by mature singles grew 43% compared to 28% for married mature travellers. The biggest increase was among the divorced and separated singles who more than doubled their travel in Canada (table 12).

Chart 14b
Non-Commercial



Retired and Loving It

As more Canadians retire they have greater freedom to travel. Over the 1980-1990 time frame, trips by retired mature travellers jumped 44% versus 10% for those still working. Over the same period, the number of retired people aged 55 + has grown 30%.

Looking Back Into the Future

Older Canadian travellers are not a homogenous group. Retirement, health, marital status, age, education etc., play a big role in determining ones travel patterns. The tourism industry will have to identify more specific travel needs and cater products best suited to these varying groups. A widowed senior will no doubt have special travel needs not required by an older couple. Older adults still in the workforce full time will have more time restrictions than those that are retired.

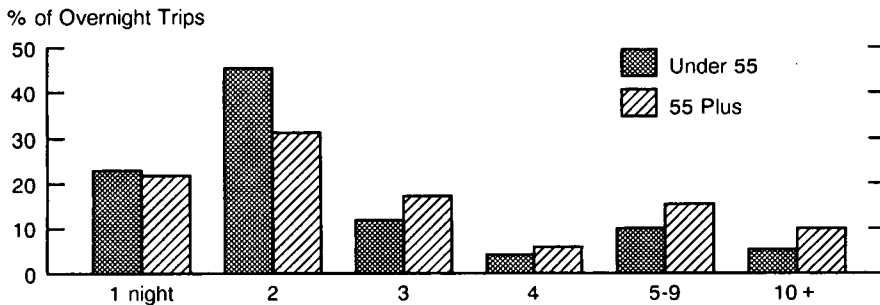
Source: Canadian Travel Survey.

Table 11
Accommodation Use by 55 +

Accommodation	1980	1990	% Change 80/90	Share 1980	Share 1990
000s nights					
Total	40,687	45,428	11.7	100	100
Friends/relatives	22,975	23,988	4.4	56	53
Cottage	6,804	9,814	44.2	17	22
Hotels	1,497	2,605	74.0	4	6
Motels	3,081	3,464	12.4	8	8
Camping	3,274	3,102	-5.3	8	7
Other	3,056	2,455	-19.7	8	5

Source: Canadian Travel Survey, special tabulations.

Chart 16
Duration by Age



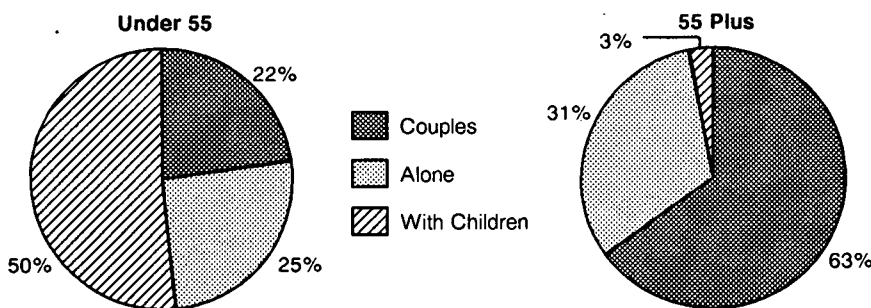
Source: Canadian Travel Survey, 1990.

Table 12
Marital Status of 55 + Market

Marital Status	1980	1990	Change 80/90	Share 1980	Share 1990
000s					
Total	7,809	10,270	31.5	100	100
Married/commonlaw	6,013	7,700	28.1	77	75
Single	1,796	2,570	43.1	23	25
Widowed	1,181	1,496	26.7	15	15
Separated/divorced	262	687	162.2	3	7
Single, never married	353	387	9.6	5	4

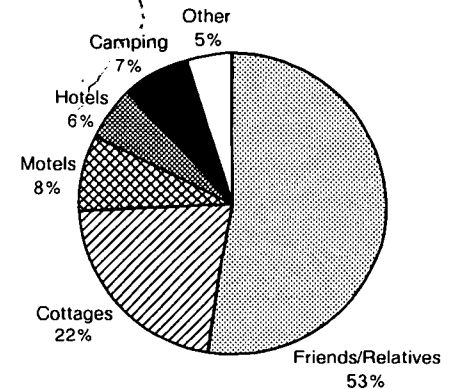
Source: Canadian Travel Survey, special tabulations.

Chart 17
Travel Party Composition



Source: Canadian Travel Survey, 1990.

Chart 15
Accommodation Choices of 55 + Travellers



Source: Canadian Travel Survey, 1990.

Continued from page 9

Many tourism products presently offered to middle aged baby-boomers will have to be fine-tuned for the post-war older boomers. As they approach retirement (55-64), this age group alone will make up 14% of the total population. They will travel more, further and to more exotic locations. From their acquired travel experiences will evolve higher expectations of tourism products and services.

Given the widening appeal of international locales and the popularity of the U.S. among the mature travel group, the domestic tourism industry will be challenged to create new travel products in order to encourage older Canadians to see more of their own country or to revisit destinations that they may have gone to in their younger years. The aging of the population throughout various parts of the world offers Canada opportunities for expanding market possibilities.

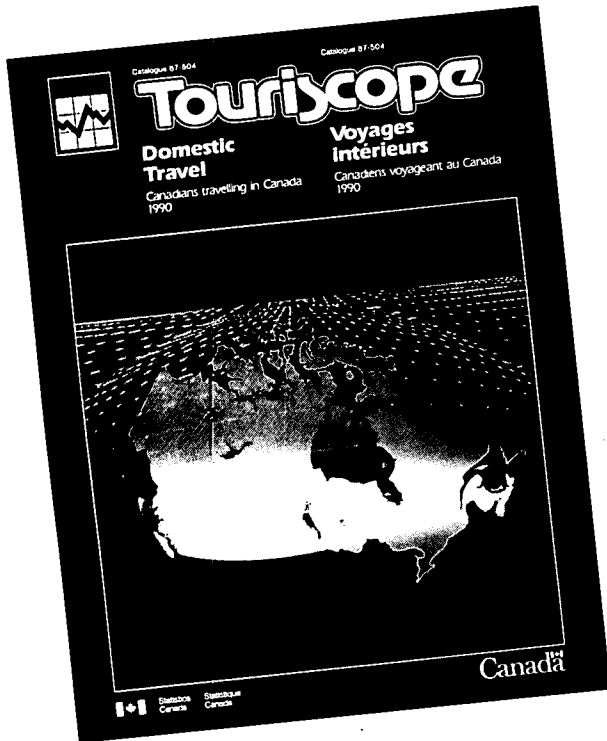
Laurie McDougall is a Senior Analyst with the Education, Culture and Tourism Division. Cam Davis is a Senior Research Associate with the Canadian Tourism Research Institute, Conference Board of Canada. The views expressed in this article are not necessarily endorsed by the Conference Board.

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		Second Quarter 1991	Percentage Change	
			Previous Quarter	Previous Year
VISITORS TO CANADA				
From United States	T	8,864	64.9	-2.5
Overnight visits(p)	T	3,198	121.3	-3.5
By auto	T	2,146	125.7	-0.9
From Overseas	T	866	119.8	-3.2
Overnight visits(p)	T	785	121.8	-4.8
Top Seven Countries				
United Kingdom	T	149	170.9	-4.5
Japan	T	100	78.6	-11.5
France	T	84	200.0	16.7
Germany(1)	T	71	153.6	1.4
Netherlands, The	T	29	262.5	11.5
Australia	T	28	86.7	-9.7
Hong Kong	T	27	22.7	-6.9
CANADIANS OUTSIDE CANADA				
To United States	T	20,192	20.6	17.6
Overnight visits(p)	T	4,410	18.7	11.6
By auto	T	3,260	36.9	21.0
To Overseas	T	604	-31.0	-13.0
INDUSTRY SECTOR				
Airline passengers (Level I)	T	5,127	3.3	-4.7
Airline passenger-km (Level I)	M	10,426	-17.5	3.4
Inter-city bus passengers	T	3,606	4.0	7.3
Restaurant receipts	M	4,287	16.5	-7.7
PRICES				
1981 = 100 (not s.a.)				
Travel price index		177.5	-1.3	8.0
Consumer price index		167.0	0.7	6.2
Restaurant meals		176.0	0.7	11.4
Inter-city transportation		231.2	-0.8	19.2
Gasoline		156.1	-5.8	-1.0
ECONOMIC				
Gross domestic product, 1986 prices (s.a.)	M	504,340	1.4	-1.0
Amusement and recreation	M	4,158	-3.8	-4.8
Accommodation and food services	M	11,144	-0.4	-10.5
Personal disposable income per capita (s.a.)		17,604	1.2	4.8
LABOUR FORCE				
Labour force (s.a.)	T	13,770	0.5	1.0
Unemployed	T	1,421	2.5	38.1
Employed	T	12,348	0.3	-2.1
Accommodation and food services (not s.a.)	T	763	6.6	-2.2
EXCHANGE RATES				
In Canadian Dollars:				
American Dollar		1.1489	-0.6	-1.8
British Pound		1.9632	-11.0	0.1
Japanese Yen		0.008307	-3.9	10.2
German Mark		0.6629	-12.3	-5.0
French Franc		0.1957	-11.9	-5.7
Mexican Peso		0.000383	-1.8	-10.3

(M) Millions. (T) Thousands. (s.a.) seasonally adjusted. (p) preliminary. (1) Germany-W. in 1990