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The Outbound Canadian Travel Market in 1990

by Lise Beaulieu-Caron

Despite the emerging Middle East crisis and the economic slowdown, Canadian residents travelled abroad in record numbers in 1990. The last issue of **Travel-log** highlighted marked shifts in destination choices made by Canadians on overnight non-business travel. Travel participation levels declined at home while more Canadians travelled abroad.

The United States remains the most popular foreign destination for outbound Canadians. Overnight trips to the U.S. totalled 17.3 million in 1990¹, up 54% from 1980. Some 53 million sameday cross-border visits were made in 1990, double the number in 1980. During the same period, twice as many Canadians travelled to all other countries, reaching 3.2 million for the year 1990 (Table 1).

The outflow of funds accompanying the growing number of Canadians travelling abroad in 1990 translated into an international travel deficit of \$6.8 billion. Canadians spent \$11.8 billion in foreign countries in 1990, excluding international passenger fares. Preliminary figures for 1991 show a shortfall of \$7.1 billion on international travel, as the number of Canadians travelling overseas dropped while visits to the United States continued to grow. Despite the end of the Persian Gulf War, the number of trips overseas remained below pre-crisis levels.

Travel to the United States Growing
 Canadian travel to the U.S. changed dramatically in the latter part of the 80's. The increase in Canadians taking at least one overnight non-business trip to the U.S. is the most significant tourism-related



CONGRATULATIONS BOB CHADWICK!

After 33 years with the Government of Canada – most of them at Statistics Canada – Bob Chadwick retires in July.

Readers of the quarterly **Travel-log** will miss Bob's contributions that have spanned the past 11 years. Bob's keen analytical skills and writing talent have helped **Travel-log** become an important and highly respected information source for the travel and tourism industry.

Bob's last contribution to **Travel-log** will appear in the next issue. The topic will be: Employment in the tourism industry.

In addition, Bob took the lead in developing, editing and producing **Tourism in Canada – A statistical digest.** That series spanned the period 1972-1988.

Good luck Bob! From your colleagues at Statistics Canada, and your friends and associates in Travel and Tourism, our warmest wishes for a happy retirement.

¹ At the time of the writing of this article, 1990 data had not been finalized and should be considered preliminary.

**Table 1
Canadian Travel Abroad**

Person-trips by Canadian Residents	1980	1990 ^P	1991 ^P
	'000		
United States			
SameDay	23,505	53,171	60,314
Overnight	11,238	17,262	19,036
Other Countries	1,585	3,153	2,824

Source: International Travel Survey.

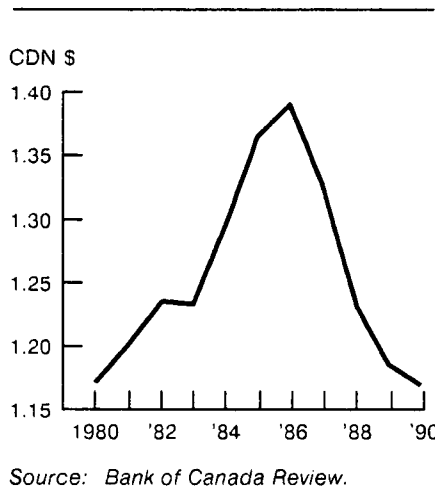
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development in this country in recent years. More Canadians chose the U.S. for leisure trips over interprovincial travel for the first time ever in 1990².

Visits to the United States for stays of more than twenty-four hours remained under 12 million between the years 1980 and 1986. Starting in 1987, a stronger Canadian dollar against the U.S. currency made it cheaper for Canadians to leave home (Chart 1). A new pattern of ever-increasing levels of overnight U.S. travel emerged (Chart 2).

Overnight trips to the U.S. by automobile progressed throughout 1990. At the same time, the rate of

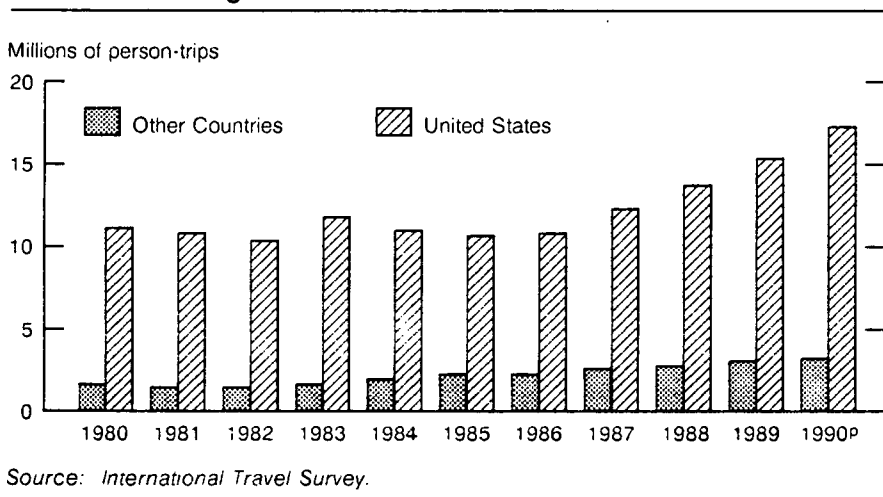
**Chart 1
CDN \$ per unit of U.S. \$**



increase for other modes of travel slowed down, and finally levelled off in the last quarter of 1990 (Chart 3). Airlines started to feel

² See *Travel-log*, vol. 11 No. 2, Table 1. The Spring 1992 issue focused on Canadian travel participation levels.

**Chart 2
Canadian Overnight Travel Abroad**



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Photos courtesy of Statistics Canada

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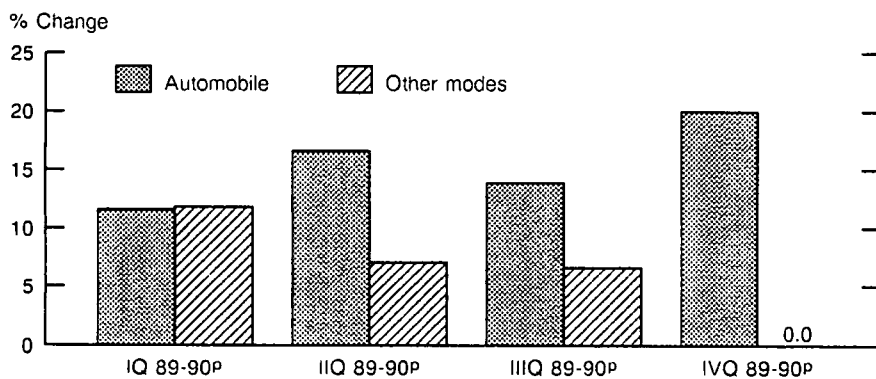
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Note of Appreciation

Canada owes the success of its statistical system to a long-standing cooperation involving Statistics Canada, the citizens of Canada, its businesses and governments. Accurate and timely statistical information could not be produced without their continued cooperation and goodwill.

Chart 3
Quarterly Percentage Change, Overnight Person-trips to the United States



Source: International Travel Survey.

Table 2
Canadian Travel to the United States

Person-trips by Canadian Residents	1986	1987	1988	1989	1990 ^P	1991 ^P
	'000					
Sameday	27,326	32,440	37,609	44,586	53,171	60,314
Automobile	25,894	30,978	36,185	43,300	51,829	59,074
Other modes	1,432	1,462	1,424	1,286	1,342	1,240
One or more nights	10,793	12,253	13,699	15,325	17,262	19,036
Automobile	7,020	8,213	9,315	10,549	12,164	14,289
Other modes	3,773	4,040	4,384	4,776	5,097	4,747

Source: International Travel Survey.

Continued from page 2

the pinch of rising fuel prices with the onset of the Middle-East crisis in the latter months of the year. Preliminary figures for 1991 show an increase in automobile travel along with a decline for other modes of transport (Table 2).

Overnight spending in the United States reached \$6.9 billion in 1990, excluding international passenger fares. Holiday trips represented 52% of all overnight trips to the United States in 1990 (Table 3). Lasting an average 9 nights, they accounted for an outflow of \$4.4 billion.

Sameday Border Crossings

In 1980, sameday visits accounted for 68% of travel to the United States and represented an outflow of \$154 million. By 1990, sameday visits rose to 75% of all visits to the U.S., and accounted for a record number of 53.2 million trips with expenditures of one billion dollars. The average out-of-pocket expense involved in this type of travel had been small in the past, some \$7 per visitor in 1980. However, with the emerging phenomenon of cross-border shopping in recent years, average sameday spending jumped to \$19 in 1990.

Table 3
Why Canadians Travel to the United States

Purpose	1990 ^P	Share
	'000	%
Overnight Person-trips to the United States	17,262	100.0
Leisure		
Holiday, Vacation	9,009	52.2
Friends or Relatives	2,701	15.6
Shopping	809	4.7
Vacation Home	800	4.6
Events and Attractions	777	4.5
Personal/Educational	454	2.6
In Transit to Canada	224	1.3
Business		
Meetings	898	5.2
Convention/Conference/Trade Show/Seminar	750	4.3
Other Work	324	1.9
Other Than Above	492	2.9
Not Stated	24	0.1

Source: International Travel Survey.

Ontario Residents Dominate Market

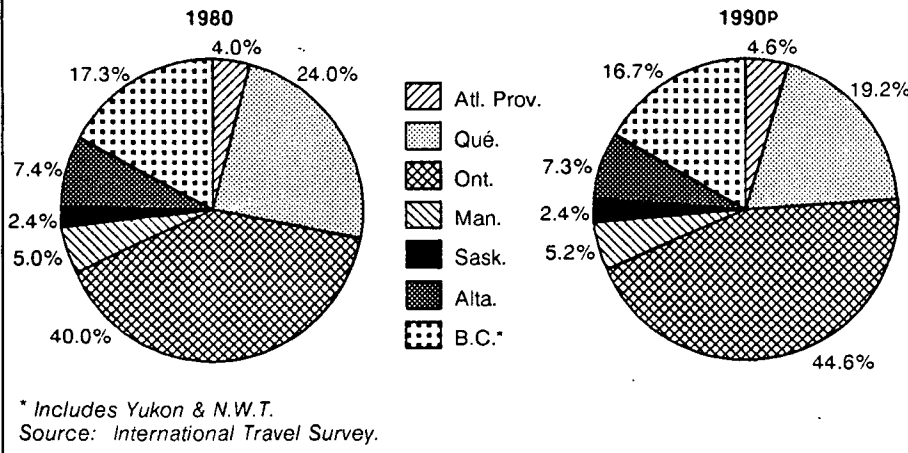
In 1990, Ontario led the way across the border with 45% of all overnight trips to the United States, the only province to increase markedly its market share to that country compared to 1980 (Chart 4). Ontarians spent \$3.3 billion in 1990 on trips lasting an average of 8 nights in the United States.

Quebec placed second with a decreasing share of the U.S. outbound market (19% in 1990), with expenditures of \$1.3 billion on trips averaging 8 nights. British Columbia's portion, including residents of the Yukon and Northwest Territories, remained at 17% of the national total. These residents spent \$0.9 billion on trips that lasted 6 nights, a shorter stay in comparison with the two major markets in the East.

Florida First in Terms of Tourist Nights

Florida remains a favourite destination for Canadians. The Sunshine State claims the largest number of nights by Canadians in

Chart 4
Overnight Person-trips in the U.S., by Province of Residence



million. Ontario residents made 68% of these visits to N.Y., while Quebecers accounted for 29% of the total.

Florida placed second in the popularity chart with 2.4 million visits of one or more nights. Washington State came in third place in terms of overnight visits (2.3 million), followed by Michigan with 1.6 million. Ontarians made 91% of all Canadian trips to Michigan while British Columbians accounted for 86% of all overnight Canadian visits to Washington.

Bordering States Most Popular
The proximity of major Canadian population centres to neighbouring areas of the U.S. affects provincial travel patterns. Ontario and Quebec residents chose New York State as their favourite place to visit in the United States in 1990. Atlantic residents elected Maine; Manitoba and Saskatchewan residents went to North Dakota; Albertans selected Montana while Washington was favoured by residents of British Columbia. However, Canadians' love affair with Florida will no doubt continue to grow as its population ages.

Favourite Travel Activities
The increasing tide of Canadians shopping in the U.S. has affected the economies of communities along the border. Tourism industry representatives acknowledged that lower U.S. prices were the biggest draw.

The International Travel Survey recently started examining leisure shopping as a tourist activity, and found that in 1990, 77% of Canadian travellers in the U.S. reported shopping as an activity (Table 5). More and more travel destinations are marketing shopping as a major tourist attraction. Other than shopping, activities frequently quoted were sightseeing (58%) and sports or outdoor recreation (42%).

Table 4
Overnight Visits, Expenditures and Length of Stay of Canadian Residents in 10 Major States, 1990P

Selected States	State-visits	Visit-nights	Spending	Average Length
	'000	'000	\$'000,000	Nights
Total Overnight State-visits	24,562	122,275	6,825.4	5.0
New York	3,519	9,031	591.5	2.6
Florida	2,432	45,827	2,009.1	18.8
Washington	2,307	6,635	317.6	2.9
Michigan	1,596	4,455	236.1	2.8
Maine	1,087	3,500	196.8	3.2
Vermont	888	2,369	125.6	2.7
North Dakota	879	1,838	132.8	2.1
Montana	859	2,607	139.6	3.0
California	797	7,677	517.2	9.6
Pennsylvania	753	1,679	95.9	2.2
Other States	9,446	36,657	2,463.1	3.9

Note: Each visit to a State is counted.
Source: International Travel Survey.

►Continued from page 3

the United States (Table 4). In 1990, Canadians spent 45.8 million nights in Florida, or 37% of the total in the United States. Overnight spending amounted to \$2,009 million in 1990, for an average stay of 19 nights, the longest among States. Runners-up were Arizona with 17 nights and Hawaii, 15 nights.

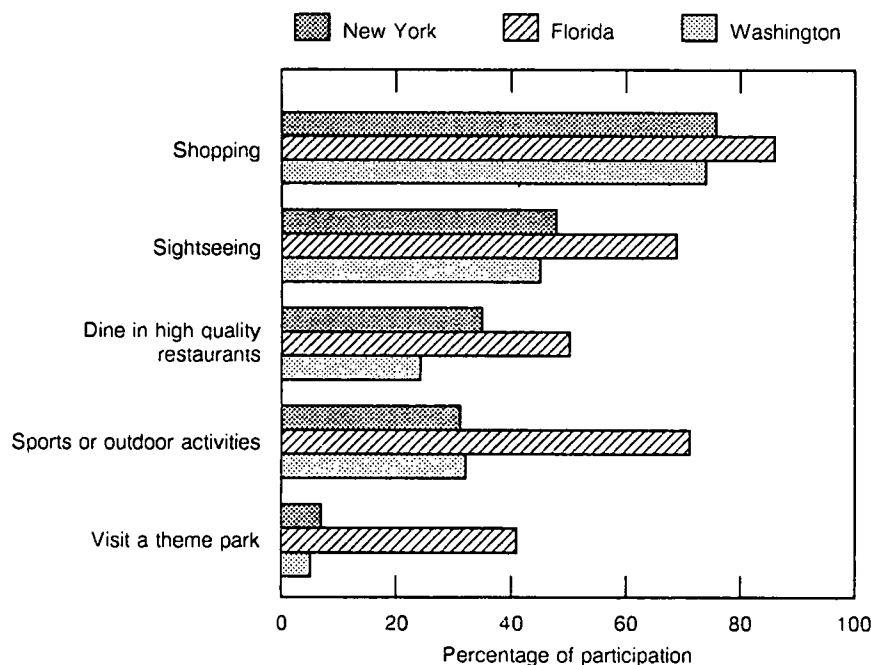
Four out of ten overnight visits to Florida occur in the first three months of the year, with stays

averaging 16 nights. However, Canadians coming home later in the spring report longer stays, 32 nights in the second quarter.

New York Most Visited State

Due to its proximity to the two most populous provinces, New York State is tops among Canadian overnight visitors. In 1990, Canadians made 3.5 million visits to the Empire State, staying an average of 3 nights. This represented an outflow of \$591

Chart 5
Participation in Selected Activities, Top Three Overnight State-Visits, 1990^P



Source: International Travel Survey.

►Continued from page 4

The top three American States catering to the Canadian travel market show different attraction levels in terms of activities reported on these trips to the United States (Chart 5). Shopping is at the top of the list for all three, but it is dominant in Florida (86%). Taking in local sights is the next most common pursuit, but more so when the trip includes a Florida visit. Visiting a theme park is decidedly a Floridian experience.

Overseas Destinations at a Turning Point

While the United States remained the favourite international destination for Canadians, overseas trips doubled between 1980 and 1990 (Table 1). Preliminary numbers are showing that in 1991 Canadians are

staying closer to home following the Gulf war and recessionary economic times.

Ontario Residents Dominate the Overseas Market

In 1990, Ontarians made 52% of all overnight trips to off-shore countries, about the same market share as in 1980 (Table 6). They spent \$1,874 million in 1990 on trips lasting an average of 18 nights.

Quebec remained in second position with a slightly decreasing share of the off-shore market (22% in 1990), with expenditures of \$850 million on trips averaging 18 nights. British Columbia's portion, including residents of the Yukon and Northwest Territories, increased marginally to 12% of the national total. Residents of this part of the country spent \$537 million on trips that were longer (24 nights) than for their counterparts in Central Canada.

Table 5

What Canadians Do When Travelling in the United States, 1990^P

Activities	State-visits '000	Participation %
Overnight State-visits	24,562	100.0
Shopping	19,023	77.4
Sightseeing	14,255	58.0
Sports or Outdoor Activities	10,384	42.3
Dining at High Quality Restaurants	9,586	39.0
Visiting Friends or Relatives	9,073	36.9
Visit U.S. or State Park	6,165	25.1
Nightlife and Entertainment	5,617	22.9
Zoos, Museums, Natural Displays	5,148	21.0
Theme Parks	3,930	16.0
Festivals or Fairs	2,438	9.9
Cultural Events	2,285	9.3
Sport Events	2,087	8.5

Note: Members of a travel party can participate in more than one activity, therefore, the sum of activities exceeds the total State-visits.

Source: International Travel Survey.

The Off-shore Holiday Still Popular

Holiday or vacation trips accounted for 60% of all overseas trips in 1990 while visiting friends and relatives was the purpose reported by 18% (Table 7). Business trips held on to a market share of 14%, with meetings abroad being the principal reason for half of these.

A third of Canadian travel to overseas destinations takes place during the cold winter months, between January and the end of March. The summer months of July to September claimed 26% of the traffic in 1990. The second quarter appealed to 22%, while the last three months of the year were the least popular with 19%.

Travel to destinations outside the United States increased all through the year compared with 1989 (Chart 6). However, direct overseas re-entries showed a slight decline in the last quarter of 1990, probably due to the emerging Middle-East crisis. Figures for 1991 show that the number of overseas trips by Canadian residents dropped 10% overall from 1990.

Table 6
Canadian Residents Returning from Countries Other than the U.S. by Province of Residence

Province of Residence	Person-trips		Share	
	1980	1990 ^P	1980	1990 ^P
	'000		%	
Total	1,585	3,153	100.0	100.0
Atlantic Provinces	52	104	3.3	3.3
Québec	363	709	22.9	22.5
Ontario	806	1,632	50.9	51.8
Manitoba	41	80	2.6	2.5
Saskatchewan	28	46	1.8	1.5
Alberta	113	209	7.1	6.6
British Columbia*	182	372	11.5	11.8

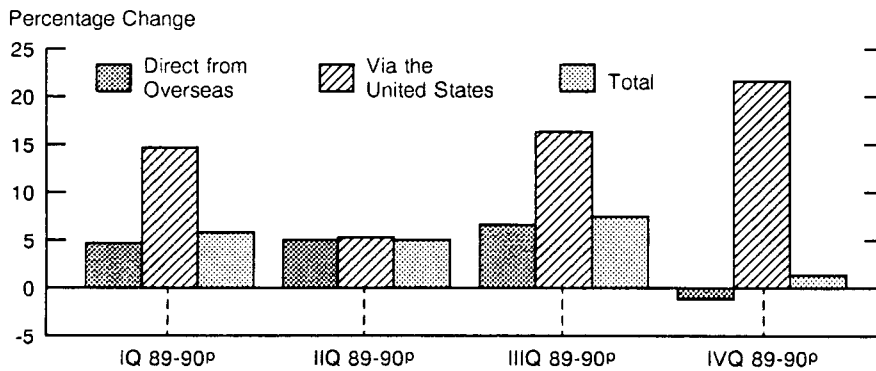
* Includes Yukon & Northwest Territories.
 Source: International Travel Survey.

Table 7
Why Canadians Travel to Countries Other than the United States

Purpose	1990 ^P	Share
	'000	
Person-trips to Countries Other Than the United States	3,153	100.0
Leisure		
Holiday, Vacation	1,886	59.8
Friends or Relatives	579	18.4
Personal/Educational	118	3.7
Other Leisure: Events and Attractions, Vacation Home or Shopping	41	1.3
Business		
Meetings	209	6.6
Convention/Conference/Trade Show/Seminar	135	4.3
Other Work	106	3.4
Other Than Above	76	2.4
Not Stated	3	0.1

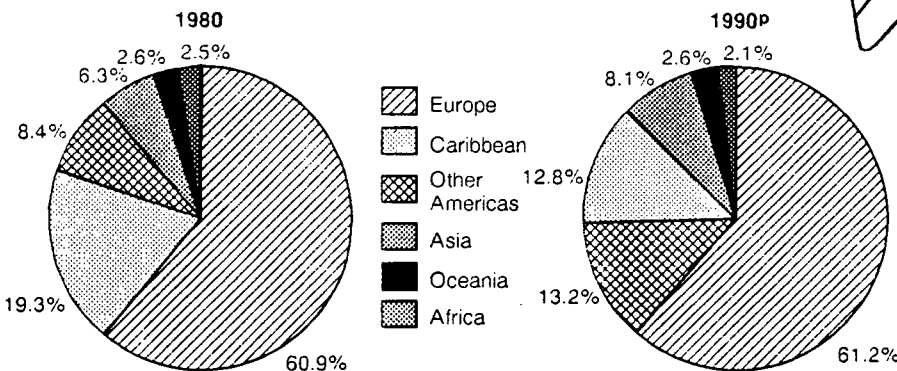
Source: International Travel Survey

Chart 6
Quarterly Percentage Change, Person-trips to Countries Other Than the United States



Source: International Travel Survey.

Chart 7
Market Share by Major Overseas Areas, Visits of One or More Nights



Source: International Travel Survey.

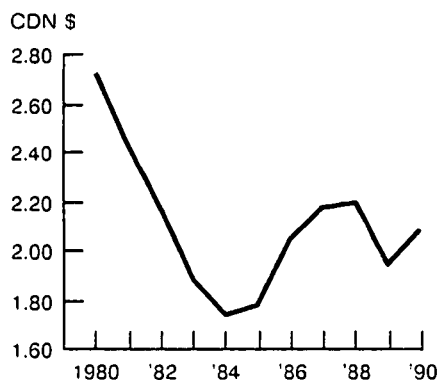
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Europe Foremost Overseas Destination

Canadians photographing Big Ben, viewing Paris from the Eiffel Tower, or admiring the fairy-tale castle of Neuschwanstein make up a large portion of those visiting Europe. Over 2.8 million visits of one or more nights were made to European countries in 1990, up 14% from 1989. Europe remains the favourite overseas destination for Canadians. Its market share still represents some 61% of overnight visits, the same level as in 1980 (Chart 7). As the European Community adjusts to a Europe without borders, massive promotional campaigns to attract North American travellers are to be expected.

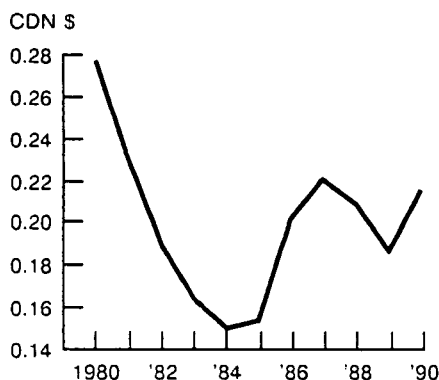
The popularity of European destinations was not affected by the lesser value of the Canadian dollar against most Western European currencies in 1990 (Charts 8a-8c). Canadians spent \$2.2 billion in Europe in 1990, excluding international passenger fares, 29% more than in 1989. The average length of stay remained the same as in 1989 at 12 nights.

Chart 8a
CDN \$ per unit of the British Pound



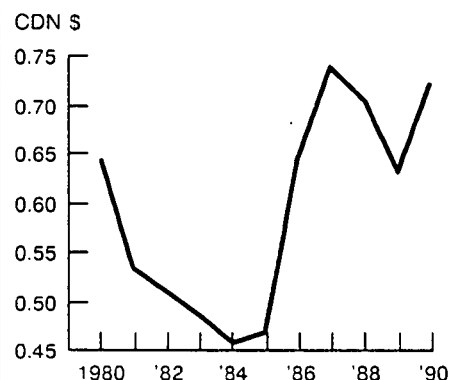
Source: Bank of Canada Review.

Chart 8b
CDN \$ per unit of the French Franc



Source: Bank of Canada Review.

Chart 8c
CDN \$ per unit of the German mark



Source: Bank of Canada Review.

Table 8
Overnight Visits to 15 Major Overseas Countries by Canadian Residents

Selected Countries	Visits		Market Share	
	1980	1990 ^P	1980	1990 ^P
	'000		%	
Visits¹ of One or More Nights	2,429	4,648	100.0	100.0
United Kingdom	432	673	17.8	14.5
Mexico	143	433	5.9	9.3
France ²	193	401	7.9	8.6
West Germany	157	323	6.5	7.0
Netherlands	106	212	4.4	4.6
Switzerland ³	103	176	4.2	3.8
Italy ⁴	98	166	4.0	3.6
Austria	69	143	2.8	3.1
Dominican Republic	10	129	0.4	2.8
Belgium ⁵	59	112	2.4	2.4
Portugal ⁶	35	101	1.4	2.2
Cuba	32	97	1.3	2.1
Spain ⁷	38	88	1.5	1.9
Hong Kong	24	78	1.0	1.7
Bahamas	118	76	4.9	1.6
Other Countries	813	1439	33.5	31.0

¹ Each time a traveller visits a country on a trip, it is counted.

² Includes visits to Monaco and Andorra.

³ Includes Liechtenstein.

⁴ Includes San Marino and Vatican City.

⁵ Includes Luxembourg

⁶ Includes Azores & Madeira

⁷ Includes Canary Islands

Source: International Travel Survey.

Continued from page 6

The United Kingdom is the favourite offshore location for Canadians travelling abroad (Table 8). Almost one quarter of all overnight visits to Europe are

made to the British Isles (Chart 9). It is the most popular overseas destination among residents of all provinces of Canada except in Quebec where it places third, behind France and Mexico. France

is number two in Europe with 14% of European overnight visits, followed closely by West Germany at 11%.

Changing Caribbean Market

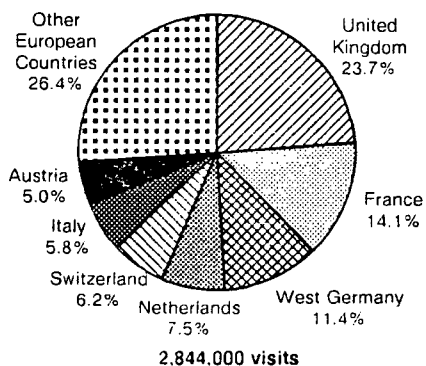
The Caribbean appeals to the second largest contingent of Canadians visiting overseas. By springtime of 1990, the damage brought to the islands by Hurricane Hugo had been repaired. To recoup, retailers offered better deals to attract sojourners to the area.

The sunny beaches of the Caribbean drew 596,000 overnight Canadian visits, a drop of 6% over 1989. The overall market share of one or more nights visits to this area shrank from 19% in 1980 to 13% in 1990, as neighbouring Latin American States saw their share increase.

The Dominican Republic dominated Canadian travel patterns to the Caribbean Islands in 1990, accounting for 22% of overnight visits to the region. However, these 129,000 overnight visits represented a loss of 28% compared to 1989, the first drop since 1986.

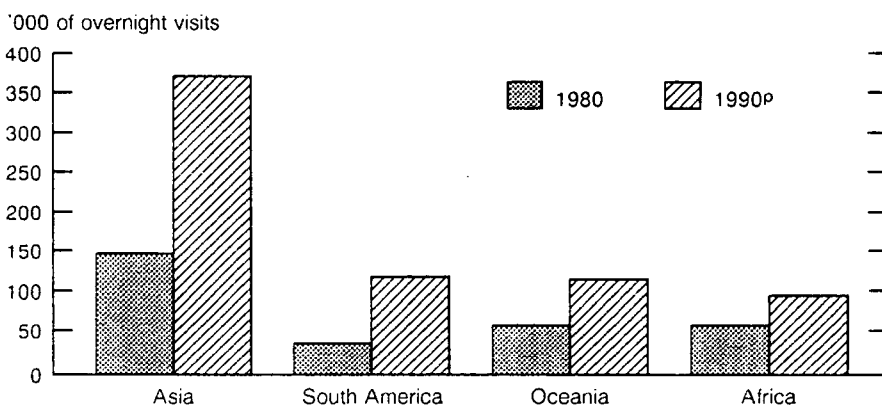
A new wave of development in the Bahamas has helped increase the number of overnight Canadian visits in 1990, up 8% from 1989. With only 2% of all overnight visits in countries other than the United

Chart 9
Market Shares by Major European Countries for Visits of one or more nights, 1990P



Source: International Travel Survey.

Chart 10
Canadians to Faraway Places



Source: International Travel Survey.

Continued from page 7

States in 1990, the Bahamian Islands had ranked fifth among the most popular overseas destinations in 1980. The only other major Caribbean destination witnessing an increase in 1990 was Cuba, up 43% from 1989, for a visitation level of 97,000.

Cruising in the Caribbean

Part of the shift away from long term stays in the Islands resulted from the increasing popularity of cruises out of Miami, the leading cruise embarkation port in the world. For example, sameday visits to individual Caribbean islands amounted to 152,000 in 1980 while in 1990 they represented 432,000 landings, indicating an upsurge in the usual string of shore leaves associated with cruises in the area.

South America Boomed in the 80s

South America offers exotic landscapes to adventure-seeking Canadians. Between 1980 and 1990, overnight visits to that region tripled (Chart 10). Much of the tourism growth to South America in the last decade came from an influx of visitors to newly

developed resort areas in Venezuela. In 1980, some 5,000 Canadians visited that country for one or more nights and by 1989, the number exceeded 100,000. Civil unrest in 1990 saw Venezuela overnight visitation plummet to 66,000.

Colombia's tourism industry also suffered a setback as violence erupted in relation to drugs. In 1989, travellers reported 32,000 overnight visits, a ten-fold increase from 1980. The violence associated with Colombia's problems is scaring away tourists, as only 2,000 Canadians reported an overnight trip to that country in 1990.

Costa Rica Emerges as a New Destination

South American destinations lost ground in 1990 over 1989 (-33% in visits of one or more nights) while neighbouring Central American countries witnessed burgeoning growth (104%) during the same period brought by new tourism development in Costa Rica. Renowned for its rich tropical flora, Costa Rica attracted some 30,000 Canadian overnight visits in 1990, a nine-fold increase compared to 1980.

Mexico a Favourite Sun Spot

Mexico also saw an increase in its market share in the last decade, from 6% in 1980 to 9% of all overnight visits outside the United States. The Mexican government has put a high priority on the tourism industry, as part of an overall plan to restore the national economy, and has aggressively doubled its 1990 promotion budget.

Some 433,000 overnight visits by Canadians were recorded throughout 1990, up 16% from 1989 to an all-time high. Six out of ten Canadians heading for Mexico in 1990 went between January and the end of March. Residents of all provinces, except the Atlantic region, have elected that sun-drenched country as the most popular place to visit in the winter time, apart from the United States (Table 9).

Growing Interest in Asian Destinations

In 1990, Canadians reported some 376,000 overnight visits to Asian countries, more than double levels in 1980 (Chart 10). Hong Kong continued to dominate Canadian travel patterns to Asia in 1990, with 78,000 visits of one or more nights, followed by Japan at

Table 9
Canadian Winter Travel

Selected Countries	First Quarter of 1990 ^P	Market Share
	'000	%
Total Overnight Visits¹	1,179	100.0
Mexico	266	22.6
United Kingdom	103	8.7
Dominican Republic	68	5.8
France ²	52	4.4
Cuba	46	3.9
Venezuela	43	3.7
Jamaica	38	3.2
West Germany	37	3.2
Bahamas	32	2.7
Netherlands	28	2.4
Other Countries	466	39.5

¹ Each time a traveller visits a country on a trip, it is counted.

² Includes visits to Monaco and Andorra.

Source: International Travel Survey.

►Continued from page 8

52,000. These two locations accounted respectively for 21% and 14% of overnight visits to Asia.

Reported trip expenditures in Japan are high. In 1990, the average visit, without the international fares, cost \$1,700 for a stay of 16 nights. Canadians on visits to the land of the Rising Sun are now staying longer than at the beginning of the 80s (12 nights in 1980).

Canadians developed a growing interest in Thailand, which emerged recently as the third most popular destination in the region, with 42,000 visits of one or more nights in 1990, up 8% from 1989 and a four-fold increase over 1980. Travel to China is still suffering from the Tiananmen legacy. The year before the civil disturbances erupted in China, some 37,000 overnight visits were made by Canadian residents, positioning China as the third most popular Asian destination in 1988. Since 1989, visits have been dropping.

Longest trips to the South Pacific

The South Pacific's share of Canadian Overseas travel remained relatively stable during

Table 10
Domestic and International Travel by Canadians

Travel by Canadians	1980	1990	Change 1980/90	Share	
				1980	1990
	'000		%	%	
Overnight Travel:				100.0	100.0
Domestic	87,310	98,741	13.1	85.3	79.3
International	12,823	20,415	59.2	14.7	20.7
United States	11,238	17,262	53.6	12.9	17.5
Overseas	1,585	3,153	98.9	1.8	3.2
Sameday Travel:	60,015	108,675	81.1	100.0	100.0
Domestic	36,510	55,504	52.0	60.8	51.1
United States	23,505	53,171	126.2	39.2	48.9

Sources: Canadian Travel Survey; International Travel Survey.

the last decade despite an increase in visits between 1980 and 1990. However, there were fewer Canadians heading that way in 1990 over 1989, -2% in overnight visits for a total of 119,000. Trips to this part of the world were the longest, averaging 29 nights in 1990. They were also the most expensive at the regional level, a typical trip representing some \$1,500 excluding international passenger fares.

Australia is the principal destination in that part of the world, accounting for almost half (59,000) of overnight visits to the region in 1990, a drop of 4% over 1989. This market represents the most expensive sojourn along with the lengthiest among all countries explored by Canadian travellers. The second most popular South Pacific destination was New Zealand, which attracted some 36,000 Canadian travellers on overnight visits, 3% more than in 1989.

Holidaying in Africa

Although Africa received more Canadian visitors in 1990 than previous years, it has not grown as fast as other exotic destinations. Only 2% of all overseas visits of one or more nights were made there in 1990. Trips to Africa averaged 20 nights in 1990, a

typical trip representing over \$1,000 excluding international passenger fares.

Morocco was the most popular African country among Canadians in 1990, with 19,000 overnight visits, up 7% from 1989 and almost double the volume reported for 1980. In second place was Egypt, which attracted some 14,000 Canadian travellers on overnight visits, 26% less than in 1989. The Middle-East crisis in the latter months of the year accounted for the drop, visits to that country having increased in the first six months of the year.

At the beginning of the 80s, Egypt had been more popular than Morocco among Canadians. These two Mediterranean countries, which have long catered to international tourism, represented 33% of all overnight Canadian visits to Africa in 1990, about the same level as in 1980.

Luring tourists with visions of roaming wilderness, Kenya attracted most Canadian visitors South of the Sahara in 1990. During the 80s, this East African country enjoyed a two-fold increase in tourism originating from Canada. In 1990, the overall volume reach a record level of 13,000 Canadian overnight visits, 5% higher than in 1989.

▶Continued from page 9

Travels in Canada

While Canadians increasingly travelled abroad, especially in the United States, overnight domestic travel remained relatively flat between 1980 and 1990. As a result, the market share for domestic travel dipped from 85% to 79% (Table 10).

Canada, like most affluent northern countries, traditionally runs a deficit in its travel account in the international balance of payments. The last year in which a surplus emerged was in 1967.

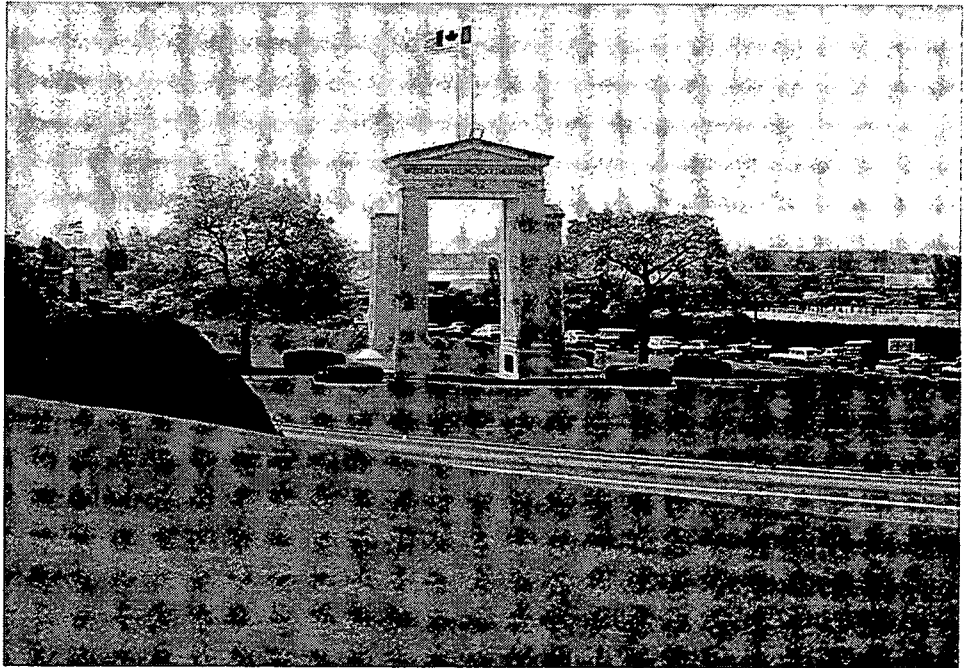
With an aging population, the Canadian propensity to seek warm climates in the winter will no doubt continue to grow. Consequently, domestic travel faces strong competition.

The tourism industry is faced with many challenges. Identifying which products need to be fine-tuned to meet the needs of a more sophisticated Canadian traveller can open some potential areas. Canada has a vast wealth of travel opportunities in nature-oriented tourism. Witness the pull that Canada's outstanding natural beauty has on Germans, French, British and Japanese residents³.

The emerging environmental awareness in the Canadian population can also create new domestic travel opportunities for the tourism industry. Nature activities as part of a holiday away from over-developed locations could be one of many new alternatives for a discerning market.

Lise Beaulieu-Caron is a Senior Analyst with the Education, Culture and Tourism Division.

³ See Travel-log, vol. 11 No. 1. The Winter 1992 issue reviewed Canada's major overseas markets to the end of 1991.



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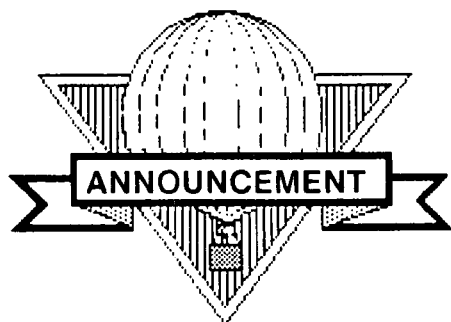
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- spending in countries visited;
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Travel Price Index

by Louis Pierre

In the first quarter of 1992, the Travel Price Index (TPI) reached 128.4 (1986 = 100) a decrease of 0.4% with relation to the preceding quarter and of 0.6% compared to the same quarter in the previous year. Furthermore, the Consumer Price Index (CPI) showed respective increases of 0.5% and 1.6%. Since 1981, the TPI annual variation rate has been higher than that of the CPI with the exception of 1987 and 1988. (Chart I)

The Travel Price Index measures variations in consumer prices of a quantity of goods and services consumed by Canadian travellers over time. The new reference year is 1986 = 100.

Revising the TPI

The Travel Price Index recently underwent substantial revision. In fact the previous TPI was created over a decade ago and has only been updated once in 1985. This new revision was based on a more stringent methodological approach. It was thus decided that the old series would be replaced by a new one. The new series for each quarter from 1980 to the present as well as annual indices are listed in Table I on the right.

The difference between the two series of indices is not very significant. The main changes made to the old series in the new one are shown in Table II. A methodological report on the Travel Price Index details the concepts used in the calculations.

Chart I
TPI and CPI Annual Growth

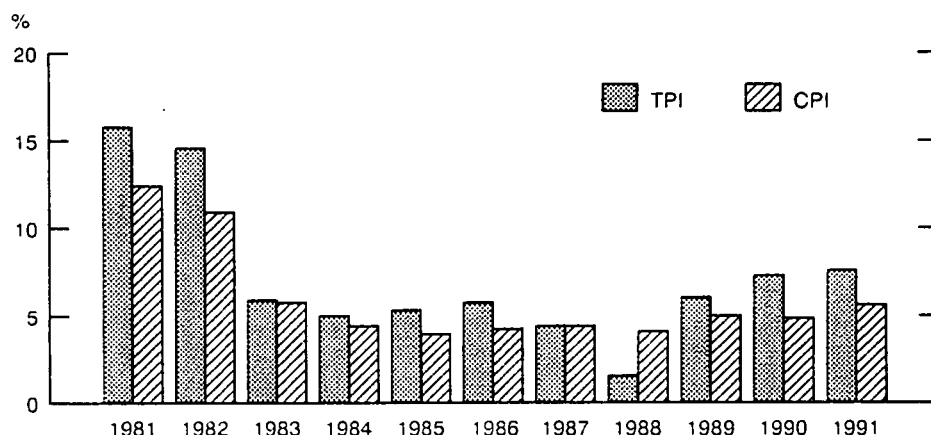


Table I
Travel Price Index, 1986 = 100

	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual
1980	57.4	59.6	62.3	64.2	60.9
1981	66.7	69.3	72.1	73.8	70.5
1982	76.5	79.9	82.8	83.6	80.7
1983	83.2	84.4	87.6	86.8	85.5
1984	87.9	88.8	92.0	90.3	89.7
1985	91.5	93.7	96.1	96.7	94.5
1986	97.9	98.9	102.6	100.6	100.0
1987	101.0	103.2	108.1	105.3	104.4
1988	104.0	105.7	108.1	106.3	106.0
1989	109.1	111.2	115.6	113.8	112.5
1990	116.3	118.5	123.4	124.3	120.6
1991	129.2	129.6	131.6	128.9	129.8
1992	128.4				

Table II
Changes made to the TPI

PREVIOUS SERIES:

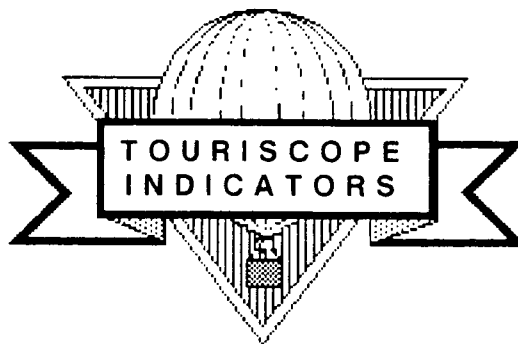
- Represented by 6 articles
- 'Other' category = the CPI
- 1979-1980 weights
- Quarterly weights based on seasonally adjusted indices
- Fixed-basket Index
- Time base 1981 = 100

NEW SERIES:

- Represented by 17 articles
- 'Other' category = 9 selected articles
- Weights updated every two years
- Annual hybrid weights
- Chain Index
- Time Base 1986 = 100

This report is available free of charge upon request at the Travel, Tourism and Recreation Section (613-951-9169).

Louis Pierre is a Senior Analyst with the Education, Culture and Tourism Division.



		First Quarter 1992	% Change	
			Previous Quarter	Previous Year
VISITORS TO CANADA				
From United States	T	5,214	-15.7	-3.0
Overnight visits(p)	T	1,458	-23.3	0.9
By auto	T	969	-23.6	1.9
From Overseas	T	389	-26.9	-1.3
Overnight visits(p)	T	349	-27.9	-1.4
Top Seven Countries				
Japan	T	65	-5.8	16.1
United Kingdom	T	53	-37.6	-3.6
France	T	27	-28.9	-3.6
Germany	T	26	-33.3	-7.1
Hong Kong	T	23	15.0	4.5
Australia	T	14	-30.0	-6.7
Italy	T	10	-37.5	11.1
CANADIANS OUTSIDE CANADA				
To United States	T	17,824	-5.2	6.5
Overnight visits(p)	T	4,000	2.1	7.7
By auto	T	2,545	-9.4	6.8
To Overseas	T	981	65.4	12.1
INDUSTRY SECTOR				
Airline passengers (Level I)	T	5,037	-2.3	1.5
Airline passenger-km (Level I)	M	10,253	1.5	1.6
Inter-city bus passengers	T	3,107	-8.1	-11.3
Restaurant receipts	M	4,136	-1.2	12.4
PRICES				
1986 = 100 (not s.a.)				
Travel price index		128.4	-0.4	-0.6
Consumer price index		127.2	0.5	1.6
Restaurant meals		135.0	0.5	2.4
Inter-city transportation		124.0	-0.6	-3.8
Gasoline		117.4	-9.1	-3.3
ECONOMIC				
Gross domestic product, 1986 prices (s.a.)	M	503,393	0.1	1.4
Amusement and recreation	M	4,179	0.0	-4.3
Accommodation and food services	M	10,250	-3.4	-5.5
Personal disposable income per capita (s.a.)		n/a	n/a	n/a
LABOUR FORCE				
Labour force (s.a.)	T	13,743	-0.1	0.2
Unemployed	T	1,468	3.3	5.2
Employed	T	12,274	-0.5	-0.4
Accommodation and food services (not s.a.)	T	750	-2.7	4.7
EXCHANGE RATES				
In Canadian Dollars:				
American Dollar		1.1772	3.8	1.9
British Pound		2.0836	3.4	-5.5
Japanese Yen		0.009156	4.5	5.9
German Mark		0.7271	4.0	-3.8
French Franc		0.2136	4.3	-3.9
Mexican Peso		0.000383	3.5	-1.8

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