



Travel-log

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Tourism Statistics: An Overview

by Lise Beaulieu-Caron

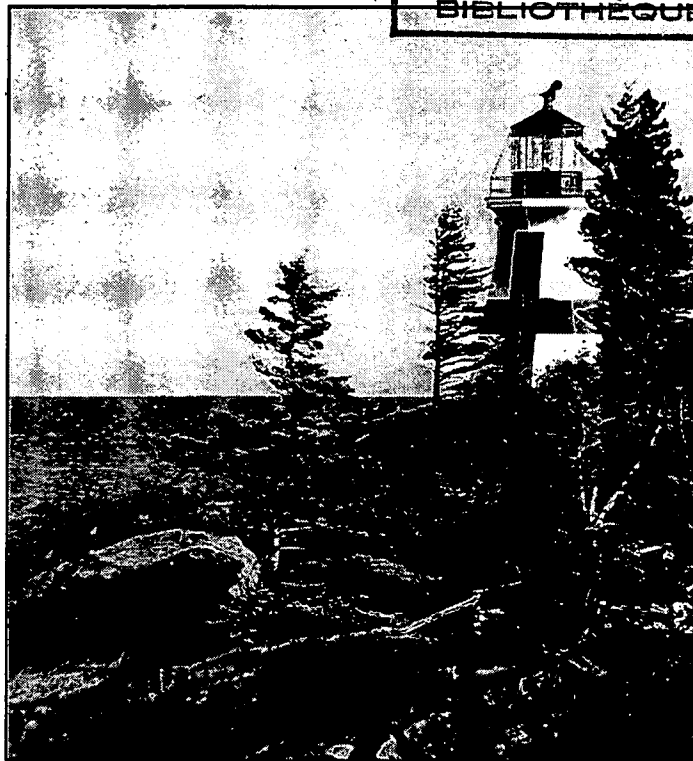
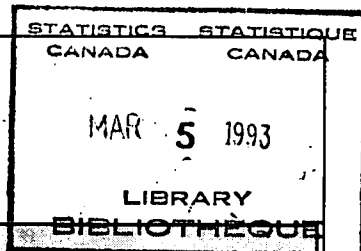
Tourism is perceived, in Canada and abroad, as one of the major economic sectors. The World Tourism Organization (WTO) estimates that in 1990 the volume of international tourists reached 444 million, representing spending of US\$255 billion.¹

Even with the Gulf crisis and the economic recession, which have affected many world tourism markets, the Organization for Economic Co-operation and Development (OECD) announced another year of overall growth for member countries in 1991.² According to estimates by the World Travel and Tourism Council (WTTC), tourism generates more production and employment globally than any other sector.³

In spite of the importance given to tourism as a revenue and job generator in Canada, a number of factors prevent us from measuring and pinpointing its contribution to the national economy. One obstacle derives from the fact that tourism is not recognized as an industry in the system of national accounts. This system only records the industrial sectors defined under the Standard Industrial Classification system of Statistics Canada. Tourism data are subsumed under different industrial categories; for example, passenger air transport is classified under the transport sector while data on accommodation and restaurants fall under the broad services field.

Furthermore, the tourism industry has a peculiarity which distinguishes it from other industries: it cannot be identified with a specific product. Instead, the tourism industry is defined by its users, tourists. To complicate things, its clientele is also

¹ World Tourism Organization, *Yearbook of Tourism Statistics*, Madrid, 1992.
² Organization for Economic Co-operation and Development, *Tourism Policy and International Tourism*, Paris, 1992.
³ World Travel and Tourism Council, *The WTTC Report*, New York, 1992.



Touryscope

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The Satellite Account for Tourism

This is a structured information system which makes it possible to collect, classify and interconnect statistics describing all of the measurable aspects of tourism. It is designed to correspond with the national accounts in terms of financial data. It is a system which will attempt to define all of the economic, socio-economic and demographic phenomena related to the supply and demand of "goods and services to facilitate business, pleasure and leisure activities away from the home environment".⁴

To achieve this objective, Statistics Canada has adopted the approach of producing four levels or types of data.⁵ The satellite account's information system is structured as follows:

Level 1 – The principal account containing the monetary measure of supply and demand: it serves as the mainspring for the whole system. It establishes the distinction between tourist and non-tourist activities within the total tourist demand and supply of goods and services. Furthermore, the spending of foreign tourists is treated as Canadian exports, while the spending done by Canadian tourists abroad is reckoned as imports to this country. Finally, this module ensures the link with the system of national accounts in current and constant prices. This information will make it possible to establish the relative importance of the various components of tourism.

Level 2 – The quantification module, which uses the monetary values established at the first level to organize related quantitative data, such as labour force, goods and services, and consumption. For example, the number of tourists who use air transportation will be associated with tourist spending under the heading of air transportation.

Level 3 – With the help of the first two levels, this module characterizes tourist activities by breaking them down according to socio-economic factors. For example, tourist spending under air transportation can be broken down by purpose of travel.

Level 4 – The fourth level contains the analysis and planning module, which will provide information on the capital stock, labour force participation rate, Gross Domestic Product, source and use of funds, price indexes and various consumer characteristics, such as level of personal savings and income/spending.

Statistics Canada's resources are currently focused on setting up the first level of this project. Systematic, planned efforts will lead to this type of system being developed in Canada.

⁴ National Task Force on Tourism Data, Final Report, Ottawa, Statistics Canada, 1989.

⁵ National Accounts and Environment Division, A Proposal for a Satellite Account and Information System for Tourism, Ottawa, Statistics Canada, 1991.



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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.

► Continued from page 1

composed of non-tourists, the proportion of which varies across the various sectors of activity comprising the tourism industry. Therefore, to estimate the contribution made by the tourism industry, the share of production consumed by tourists must be determined for each sector.

Next, all of the economic data on tourism has to be compatible with the concepts and accounting methods of the national accounts of Canada. For example, to ensure consistency with the national accounting system, household spending should be presented separately from business expenses reimbursed by employers, when both occur during a trip. This measure ensures that the same trip expenditure is not reported twice, once by the traveller and later by the employer as a business expense. Yet this spending, which makes up tourism consumption, cannot be identified in such detail using the data currently collected in travellers' surveys. Therefore, complementary data sources must be used to adjust the information gathered by these surveys.

Finally, tourism includes not only purchases made during travel, but also spending done in preparation for a trip—such as suitcases, rental or purchase of tourist vehicles, camping equipment, insurance, purchase of films, etc.—and following a trip—such as film development, etc. These consumer activities would not have taken place without tourism. Tourists' expenditures should therefore encompass all travel-related purchasing. The current travellers' surveys, however, do not collect information on spending done in preparation for, or resulting from, a trip.

The Objectives to Be Achieved
Given that a lack of data hinders an estimation of the contribution of tourism to the economy, it is of primary importance that a measure of the **Gross Domestic Product** for tourism be developed.

This is the ideal means of measuring the progress or decline of one sector compared with another. It is also the best tool for international comparison.

To be relevant, however, the measurement of tourism's Gross Domestic Product will have to take into account the fact that its production is consumed only in part by tourists. The challenge is to define the structure of the industry and what tourism represents in terms of production, employment and investment.

To establish the link between supply and demand, the data base must also incorporate travellers' needs and preferences with respect to the tourism product they are seeking. The product of tourism is a personal experience. How does one assess the aesthetic value of a magnificent countryside or a work of art? Practically, one can measure what is produced only by the means offered to travellers to experience such things, such as the admission price to a national park or a museum, as well as hospitality and transportation services catering to their needs. It is on this infrastructure and its users that the economic analysis will focus.

The development of such a measurement system would establish a structured information data base that would be an effective communication link between Statistics Canada and the users of tourism data.

At this moment, Statistics Canada can provide only scraps of information: the problem being that data are scattered over a number of surveys with different concepts and methodologies. To correct these deficiencies, Statistics Canada is developing a **satellite account for tourism**. The objective of this comprehensive information system is to make available, within a single conceptual framework, consistent information on all aspects of tourism in Canada (see **The Satellite Account for Tourism**, page 2). Essentially, the satellite account for tourism is designed to situate tourism activities within the context of the Canadian economy.

The main challenge for Statistics Canada is still the collection of data from respondents at a sufficient level of disaggregation to satisfy the requirements of the satellite account for tourism. And the objective continues to be the use of relevant data in order to demonstrate the evolution of the industry and identify its trends.

Tourism in Canada: Existing Measures

Two surveys conducted by Statistics Canada collect information on tourists and their travels, or the "demand" side of tourism. The Canadian Travel Survey (CTS) reports on trips made in Canada by Canadians, while the International Travel Survey (ITS) covers international travel.

Table 1
Tourism Spending in Canada

Overnight travel in Canada by origin	1980		1990		Change	Share	
	1980	1990	1980-90	1980	1990	1980	1990
	millions of dollars		%		%		
Total	10,415	17,817	71.1	100	100		
Canada	8,081	11,870	46.9	78	67		
intraprovincial	5,577	8,321	49.2	54	47		
interprovincial	2,504	3,549	41.7	24	20		
United States ¹	1,594	3,528	121.3	15	20		
Other countries ¹	740	2,419	226.9	7	14		

¹ Excludes international passenger fares.

Source: Canadian Travel Survey, special tabulation, 1980; Domestic Travel, Cat. No. 87-504, 1990; International Travel, Cat. No. 66-201.

► Continued from page 3

The changing size of the domestic market is reflected in the fact that, in 1990, 67% of tourist spending in Canada was by Canadian residents, while in 1980 such spending made up 78% of the total (Table 1). Americans accounted for 20% of tourist spending in 1990, despite the exclusion of international transportation fares paid to Canadian carriers (almost \$300 million) from the calculation. The proportion of spending by residents of countries other than the United States doubled, reaching 14% in 1990. The trends identified by the travel surveys allow the Canadian tourism industry to take account of the constantly changing tastes of consumers with regards to the tourism services offered to them in Canada.

On the supply side, business surveys help to identify the number of establishments providing tourist services, and their receipts.

It must be remembered, however, that only part of this revenue is attributable to tourists. In the restaurant industry, for example, the largest share is taken up by local clientele. Table 1 of the Fall 1992 edition of *Travel-log* presented ratios estimating the tourism component for each sub-sector of the tourism industry.

Apart from the disparity of data related to business surveys, identifying tourism components within an establishment can be a problem. When the establishment is used as the measure of observation, the unit sampled may be involved in more than one tourism-related activity: a resort, for example. If the secondary activities cannot be separately recognized during data collection, the problem then becomes one of classification.

To measure the performance of tourism as an economic activity, the Gross Domestic Product for each sub-sector can be used as an

analytical tool. Between 1980 and 1990, the Gross Domestic Product in constant dollars (factor cost), for certain tourism-related industries, increased more rapidly than for the economy as a whole (Table 2). The drop in the tourism-related sectors, however, was more abrupt than for the general economy between recession years 1990 and 1991. This demonstrated the tourism industry's susceptibility to economic swings during recessionary years.

Other measures are available to facilitate knowledge of how the tourism industry operates. For instance, travel price indexes can show whether the prices charged in the industry have evolved differently from the overall consumer price index (Table 3).

World Tourism Outlook

World tourism has seen incredible growth during the past forty years, from 25 million international tourists in 1950, to 444 million in 1990 (Chart 1). A certain stability is evident for the most popular destinations. France, Spain, Italy and the United States remain the most favoured countries for world tourism, constituting a third of the volume of international tourism arrivals in 1990. These countries alone take in almost 40% of world receipts (Table 4). In terms of global accommodation capacity, WTO has estimated that in 1990, 45% was situated in Europe. Thanks to this infrastructure, Europe hosted 64% of all international tourists.

Table 2

Gross Domestic Product for Selected Industries related to Tourism in Canada, 1980, 1990 & 1991

Industry Groups	1980	1990	1991	Change	
				1980-1990	1990-1991
	(millions of 1986 dollars)		%	%	
Accommodation and Food Service	11,878	12,260	10,872	3.2	-11.3
Air Transport & Services	2,259	2,816	2,443	24.7	-13.2
Interurban & Rural Transit Systems	254	176	159	-30.7	-9.7
Urban Transit System	1,657	1,334	1,216	-19.5	-8.8
Amusement and Recreational Services	2,994	4,144	3,938	38.4	-5.0
Total Economy	381,992	502,687	497,164	31.6	-1.1

Source: Industry Measure & Analysis Division; Gross Domestic Product by Industry, Cat. No. 15-001.

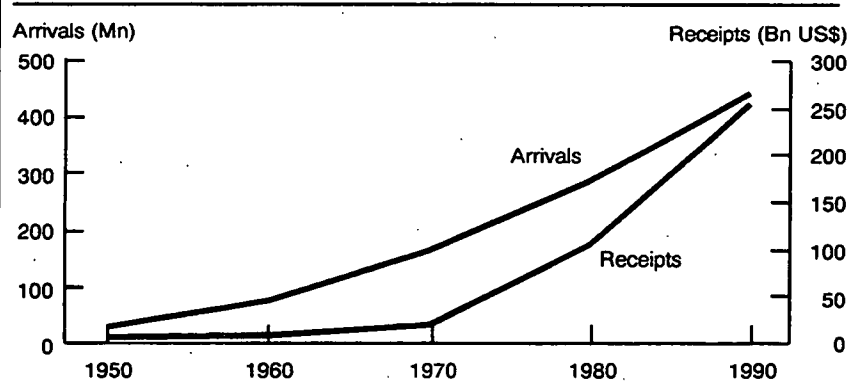
Table 3

Canadian Prices Indexes, 1980-1991

	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991
	1986 = 100											
Consumer Price Index, all items	67.2	75.5	83.7	88.5	92.4	96.0	100.0	104.4	108.6	114.0	119.5	126.2
Travel Price Index (17 CPI items)	60.9	70.5	80.7	85.5	89.7	94.5	100.0	104.4	106.0	112.5	120.6	129.8
Food purchased from restaurants	68.9	75.5	83.2	88.0	91.6	95.4	100.0	104.0	108.8	114.5	120.1	133.2
Travel tours	65.2	77.7	80.7	85.2	84.7	93.1	100.0	105.1	110.0	109.8	112.8	125.6

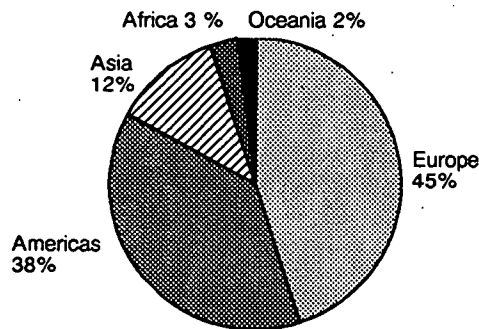
Source: Consumer Prices and Price Indexes, Catalogue No. 62-010; Travel-log, Catalogue No. 87-003, vol. 11, No. 3.

Chart 1
Development of International Tourism, Arrivals and Receipts¹, 1950-1990



¹ Excluding international fare receipts.
Source: World Tourism Organization, Yearbook of Tourism Statistics, 1992.

Chart 2
Room Capacity of Hotels and Similar Establishments, Regional Share, 1990



World Room Capacity
11,465,094

Source: World Tourism Organization, Yearbook of Tourism Statistics, 1992.

Table 4
World's Top International Tourism Dollars in 1990

Country	Receipts	Rank	Payments	Rank	Balance
(million US\$)					
United States	40,579	1	38,671	1	1,908
France	20,187	2	12,424	6	7,763
Italy	19,738	3	13,826	5	5,912
Spain	18,593	4	4,254	15	14,339
United Kingdom	15,000	5	19,106	4	-4,106
Austria	13,017	6	7,476	8	5,541
Germany	10,683	7	29,836	2	-19,153
Switzerland	6,839	8	5,989	11	850
Canada	6,374	9	8,390	7	-2,016
Mexico	5,324	10	5,379	13	-55
Japan	3,578	16	24,928	3	-21,350
Netherlands	3,615	15	7,340	9	-3,725
Sweden	2,895	22	6,066	10	-3,171

Source: World Tourism Organization, Yearbook of Tourism Statistics, 1992.

▶ Continued from page 4

Travel Between Canada and Abroad

Our nearest neighbour, the United States, remains the largest source of foreign tourists to Canada. The rise recorded in this market between 1980 and 1990, however, conceals the fact that the level reached in 1990 is still lower than the volumes of American tourists recorded between 1985 and 1988. On the other hand, during the last decade we have seen exceptional growth in the number of tourists originating from countries other than the United States (Table 5).

While Canadian travel abroad grew between 1980 and 1990, domestic travel remained relatively stable over the same period. The rise in international travel by Canadians between 1980 and 1990 was concomitant with a drop in the market share for domestic trips from 85% to 79% of the overall overnight volume (Chart 3).

Confronted with the increased number of Canadians travelling abroad, tourism officials have attempted to determine how to convince them to travel within Canada. Through a study of the various segments of the Canadian outbound travel market, Tourism Canada⁶ was able to determine which Canadian products had the highest potential to convince Canadians to shift from foreign to domestic destinations. These are:

- heritage and culture
- parks
- adventure
- festivals and events
- skiing
- golf
- water sports
- country resorts.

The analysis also identified an under-exploited demand for products such as city and country tours, educational tourism, night

⁶ Tourism Canada, Canadian Outbound Travel Market: Product Market Match, Ottawa, 1992.

▶ Continued from page 5

life and entertainment, sports events, urban experience and theme parks. To keep competitive, the Canadian tourism industry has to develop market niches in which it enjoys a comparative advantage. As part of this process, existing surveys should more closely define Canadians' perception and knowledge of the tourism product available in our own country to help the industry better market its products and services. The competitiveness of the Canadian tourism product will then have to be measured against the offerings of other countries.

The challenge of the 1990s

In light of a shrinking market base, the Canadian tourism industry needs to promote a better understanding of the sector and the markets it generates. It is becoming even more essential that governments and the general public be made aware of tourism's contribution to, and enrichment of, the heritage of Canada.

We are seeing the emergence of global collaboration in the realm of tourism. Canada is an active player in international organizations. As a member of the Working Group on Statistics of the OECD's Tourism Committee, Canada took part in the development of the **Manual on Tourism Economic Accounts**,⁷ released in 1991. This Manual provides a basic framework for the collection of data on tourism within an integrated system.

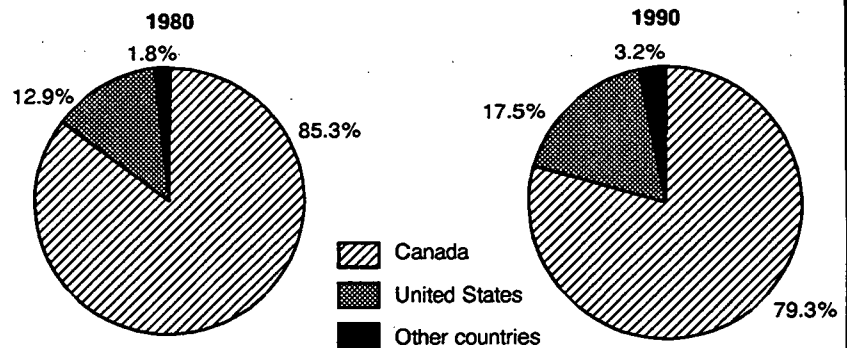
Canada collaborated with the WTO in drafting the **Recommendations on Tourism Statistics**,⁸ a report submitted in 1992 to the Statistical Commission of the United Nations Organization, with the aim of updating all international definitions on

**Table 5
Tourism in Canada**

Overnight travel in Canada by origin			Change	Share	
	1980	1990	1980/90	1980	1990
	'000 person-trips			%	
Total	87,272	93,536	7.2	100	100
Canada	74,487	78,326	5.2	85	84
intraprovincial	61,108	64,260	5.2	70	69
interprovincial	13,379	14,066	5.1	15	15
United States	10,963	12,252	11.8	13	13
Other countries	1,822	2,958	62.3	2	3

Sources: Domestic Travel, Cat. No. 87-504; International Travel, Cat. No. 66-201.

**Chart 3
Share of Canadian Overnight Person-trips by Destination**



Sources: Domestic Travel, Cat. No. 87-504; International Travel, Cat. No. 66-201.

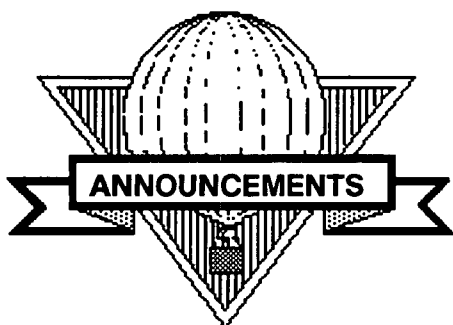
tourism. Since 1968, when the UN Statistical Commission approved definitions of tourism, the evolution of tourism and technical advances have increased needs in the area of tourism statistics. Introduction of an integrated system will make it possible to establish statistical links between tourist supply (services, receipts and costs) and tourist demand.

The WTO is continuing its awareness work at the United Nations.

All these efforts are being made in a constant search to better define the reality of tourism and to emphasize its economic importance by means of data on revenue, business and job generation.

⁷ Organization for Economic Co-operation and Development, **Manual on Tourism Economic Accounts**, Paris, 1991.

⁸ World Tourism Organization, **Recommendations on Tourism Statistics**, Madrid, July 1992.



Overnight Domestic Travel, Second Quarter 1992 - Highlights

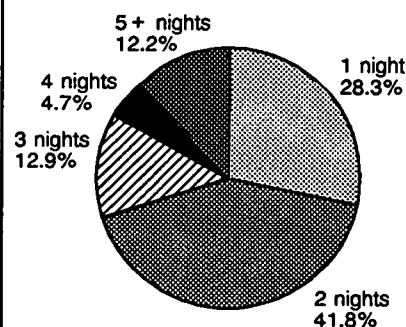
During the months of April to June 1992, Canadians made 19.8 million overnight person-trips of more than 80 km somewhere in Canada (Table 6). In the second quarter of 1992, trips lasting only one night represented 28% of the total (Chart 4). Residents of Ontario accounted for 39% of all overnight trips in the second quarter of 1992.

Travel to Visit Family/friends on Top of Agenda
Pleasure travel by Canadians on overnight trips was less popular than trips for the purpose of visiting family or friends. During the second quarter of 1992, business trips represented 17% of all domestic overnight trips.

Most Travel done by Automobile
Automobile travel accounted for 88% of all overnight trips in the second quarter of 1992. On the other hand, Canadians taking the airplane represented 7% of the total. Other modes of travel remained quite marginal.

Intraprovincial Travel is Popular
Trips of one or more nights with destinations within the province of residence totalled 16.9 million during the spring of 1992 while travel between provinces posted 2.9 million trips. A majority of

Chart 4
Overnight Domestic Travel by Length of Trip, QII, 1992



Source: Canadian Travel Survey, preliminary data.

Canadians (85%) travel in their own province during this time of the year.

Note to Users
Given significant methodological changes in data collection which were introduced in April 1992, the Canadian Travel Survey estimates for the first quarter of 1992 will be reviewed and eventually adjusted in light of the results of subsequent quarters. Moreover, because of these changes, estimates for the second quarter of 1992 are not comparable with previous quarters.

For detailed profiles on the Canadian Travel Survey for the second quarter of 1992, please contact the Editor, Travel-log at 613-951-1673.

Table 6
Overnight Domestic Travel, 1992

	Second Quarter	Distribution
	'000	%
Total Overnight Person-trips, Total	19,760	100.0
Primary Transportation		
Auto	17,384	88.0
Air	1,380	7.0
Bus	532	2.7
Rail	263	1.3
Other/Not stated	200	1.0
Primary Purpose		
Visiting Friends/relatives	8,021	40.6
Pleasure	6,701	33.9
Business and Convention	3,328	16.8
Other/Not stated	1,710	8.7
Destination		
Same Province	16,868	85.4
Other Province	2,892	14.6

Source: Canadian Travel Survey, preliminary data.

FIRST QUARTER 1992

INTERNATIONAL TRAVEL SURVEY

Preliminary data on characteristics (age groups, purpose of trip, activities, spending, etc.) related to travel between Canada and other countries are now available for the first quarter of 1992. Customized profile tables can now be requested.

Highlights

- Canadians spent \$879 million in Florida during the winter of 1992
- Apart from the United States, Mexico remains the main destination for Canadians escaping the cold.
- Residents of Michigan, followed by those of Washington State made the largest number of overnight visits to Canada during the first quarter of 1992.
- Business trips by Overseas residents increased in the first three months of 1992.

The data for 1991 should be available soon in the annual publication **International Travel**, Catalog No. 66-201.



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Travel Price Index, Third Quarter 1992

During the third quarter of 1992, the Travel Price Index (TPI) increased for a second consecutive period since the start of the year. The 2.7% growth in the third quarter followed a second quarter rise of only 1% compared with the previous quarter. In comparison, overall prices for goods and services, as measured by the Consumer Price Index (CPI) increased by only 0.5% during the third quarter of 1992 (Table 7).

A rise of 8% in accommodation prices and one of 5% for inter-city transportation costs drove travel prices upwards compared to the second quarter of 1992. Only two TPI components dropped during the same period, clothing and photographic goods and services.

From the third quarter of 1991, both the TPI and the CPI advanced at about the same rate. The largest TPI component increase over the previous year was witnessed in local and commuter transportation (Chart 5).

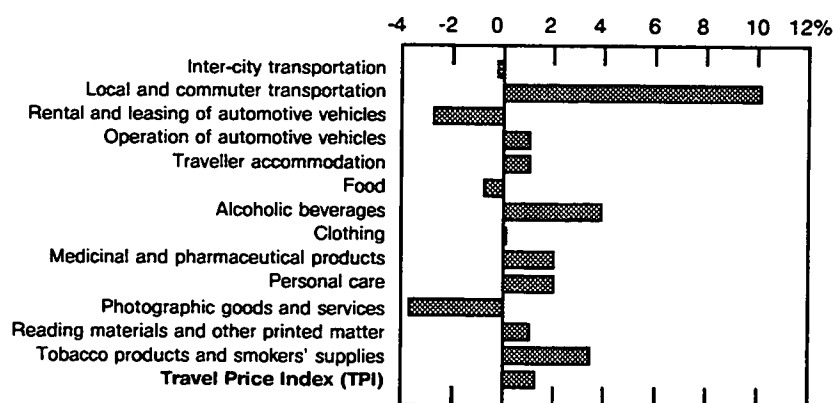
Finally, the TPI increased at a faster rate in the third quarter (1.2%) than in the second quarter (0.1%) over a 12-month period.

Table 7
The Travel Price Index (TPI) and its Published Components, 1991-1992 (not seasonally adjusted, 1986 = 100)

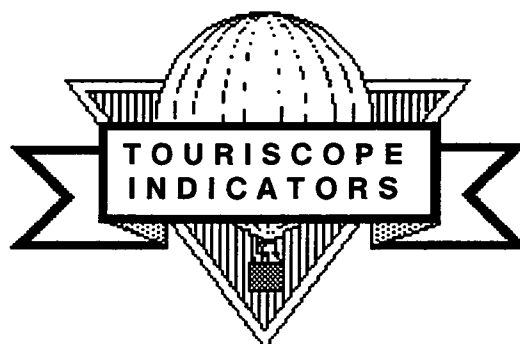
Components of the TPI	Indices of the third quarter 1992	Percentage Change	
		Second Quarter 1992	Third quarter 1991
Inter-city transportation	129.6	5.0	-0.2
Local and commuter transportation	151.3	0.9	10.1
Rental and leasing of automotive vehicles	115.7	3.4	-2.7
Operation of automotive vehicles	131.4	2.1	1.0
Traveller accommodation	126.7	7.9	1.1
Food	121.1	0.1	-0.7
Alcoholic beverages	140.3	1.0	3.9
Clothing	129.6	-0.1	0.1
Medicinal and pharmaceutical products	147.6	0.6	2.0
Personal care	128.5	1.1	2.0
Photographic goods and services	115.3	-0.3	-3.7
Reading materials and other printed matter	145.6	0.3	1.1
Tobacco products and smokers' supplies	225.5	0.2	3.5
Travel Price Index (TPI), 1986 = 100	133.2	2.7	1.2
Consumer Price Index (CPI), 1986 = 100	128.4	0.5	1.3

* The following TPI components are not published by the Division: Admission to entertainment, Use of recreational vehicles, Records, compact discs and pre-recorded audio magnetic tapes, Use of recreational sports and health facilities.
Sources: Prices Division; The Consumer Price Index, Cat. No. 62-001.

Chart 5
Percentage Changes in Travel Price Index (TPI) and its Published Components, Third Quarter, 1991-1992



Sources: Prices Division; The Consumer Price Index, Cat. No. 62-001.



		Third Quarter 1992	% Change	
			Previous Quarter	Previous Year
VISITORS TO CANADA				
From United States	T	12,423	45.3	-5.6
Overnight visits(p)	T	5,339	69.3	-2.7
By auto	T	3,872	81.8	-3.2
From Overseas	T	1,493	73.0	3.1
Overnight visits(p)	T	1,323	68.1	0.5
Top Seven Countries				
United Kingdom	T	251	66.2	1.2
Japan	T	166	69.4	-3.5
France	T	162	100.0	3.2
Germany	T	147	86.1	5.8
Hong Kong	T	51	82.1	-3.8
Italy	T	48	118.2	11.6
Switzerland	T	40	100.0	8.1
CANADIANS OUTSIDE CANADA				
To United States	T	23,363	18.2	-1.1
Overnight visits(p)	T	6,741	121.1	-4.3
By auto	T	5,518	74.4	-5.5
To Overseas	T	835	23.7	11.2
INDUSTRY SECTOR				
Airline passengers (Level I)	T	5,816	5.4	1.1
Airline passenger-km (Level I)	M	14,050	19.0	8.3
Inter-city bus passengers	T	3,296	14.6	-16.1
Restaurant receipts	M	5,001	5.3	11.9
PRICES				
1986 = 100 (not s.a.)				
Travel price index		133.2	2.7	1.2
Consumer price index		128.4	0.5	1.3
Restaurant meals		136.0	0.5	1.9
Inter-city transportation		129.6	4.9	-0.2
Gasoline		123.4	4.5	-2.6
ECONOMIC				
Gross domestic product, 1986 prices (s.a.)	M	504,158	0.5	1.0
Amusement and recreation	M	4,055	-1.2	4.3
Accommodation and food services	M	10,824	-0.7	-0.6
Personal disposable income per capita (s.a.)		17,497	0.6	0.6
LABOUR FORCE				
Labour force (s.a.)	T	13,811	0.4	0.2
Unemployed	T	1,593	2.8	11.3
Employed	T	12,218	0.1	-1.1
Accommodation and food services (not s.a.)	T	792	3.4	-2.6
EXCHANGE RATES				
In Canadian Dollars:				
American Dollar		1.2016	0.6	5.1
British Pound		2.2860	5.9	18.5
Japanese Yen		0.009630	5.1	14.8
German Mark		0.8224	11.1	25.1
French Franc		0.2426	10.5	25.4
Mexican Peso		0.000388	0.5	3.2

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