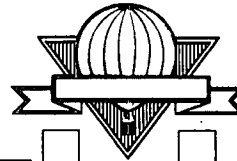


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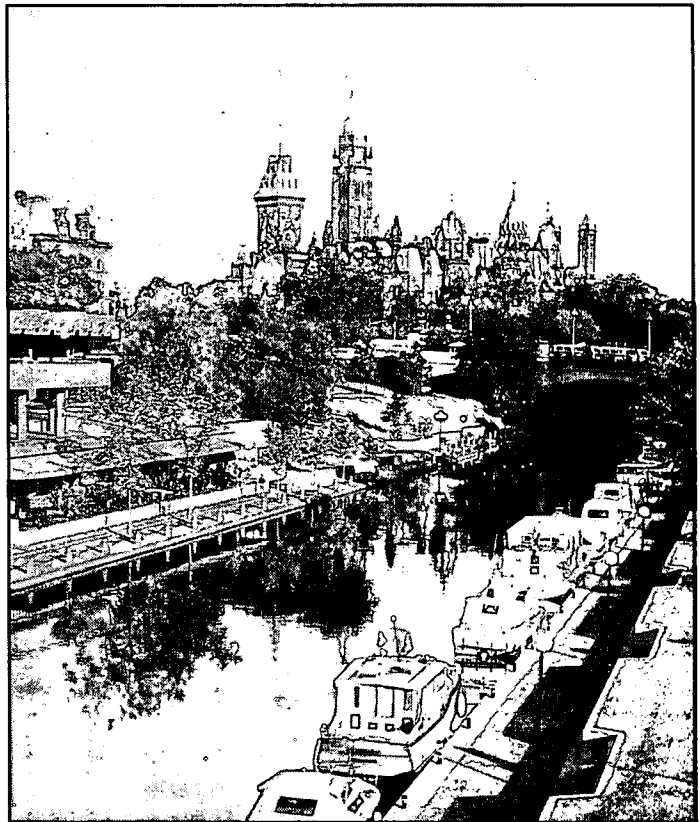
1992 Domestic Travel Survey Highlights

by Lise Beaulieu-Caron

Spending on domestic and international travel to Canada represented some 4% of Canada's Gross Domestic Product in 1992. The relative importance of domestic travel to the Canadian travel industry can be determined by the amount of spending generated in Canada by resident travellers. Of the \$28 billion in travel receipts Canada earned in 1992, residents travelling to domestic destinations contributed two-thirds, or \$16 billion¹. That same year, the strong penchant of Canadians to travel abroad resulted in foreign expenditures of \$16 billion. However, the Canadian travel industry still benefitted from the outflow, as Canadians spent some \$4 billion in Canada to reach foreign destinations in 1992.

During the last decade, which also started with a recession, domestic travel decreased between 1980 and 1984, only to rebound between 1986 and 1988. In 1990, domestic travel somewhat levelled off, as Canadians were increasingly enticed to travel to the United States. With the start of the new decade, the Canadian travel industry not only saw domestic travel flatten out, but also their American and overseas markets. Changing demographics and economic uncertainties are just some of the business challenges facing the Canadian tourism industry. In today's marketplace, tourism products and services have to keep attuned to the customer's changing needs. One way to provide the Canadian tourism industry with reliable market information is through Statistics Canada's travel surveys (see box on page 2). Knowledge of who are the customers and what their travel characteristics are can assist in positioning and marketing Canadian tourism services.

¹ For purposes of this article, domestic travel is defined as travel to a destination in Canada, 80 km or more away from the respondent's home.



Touriscope

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Measuring Travel and Tourism in Canada

Two surveys conducted by Statistics Canada collect information on travellers and their trip characteristics. The Canadian Travel Survey (CTS) reports on trips made in Canada by Canadians, while the International Travel Survey (ITS) covers international travel between Canada and other countries.

The information collected by these surveys offers the Canadian tourism industry the opportunity to examine travel patterns that may influence the tourism services offered in Canada.

The 1992 Canadian Travel Survey

The Canadian Travel Survey (CTS) is undertaken during even numbered years as a supplement to Statistics Canada's monthly Labour Force Survey. Designed to measure domestic travel flows, this survey is sponsored by Tourism Canada and provincial governments.

In preparation of the 1992 CTS, the data needs of the funding partners (the provinces and Tourism Canada) were the object of intensive reviews and discussions. To satisfy those needs, Statistics Canada implemented an important methodological change, introduced during the second quarter of the 1992 CTS. The data were collected each month rather than waiting until the end of a quarter to gather it from a respondent. Adjustments were made to the 1992 estimates taking into account both the recall bias of the first quarter and the fatigue bias of subsequent quarters. Because these changes constitute a break in the historical series, the 1992 estimates are not directly comparable with previous years' estimates. The 1992 edition of *Domestic Travel*, catalogue no. 87-504, will be available in March 1994. It will include methodological notes explaining the adjustments made to the 1992 data.

The Canadian Travel Survey remains the best available national estimate of domestic tourism in Canada. The data collection method of the 1994 survey will benefit from the experience of 1992.

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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

The Year in Review

Weatherwise, it was a cool year for Canada. The year 1992 was marked by the very slow pace of economic recovery. The Gross Domestic Product in constant dollars increased by just under 1% from 1991 and growth in disposable income slowed. Inflation, as measured by the Consumer Price Index, slowed to a crawl. In the same period, the Travel Price Index witnessed its smallest ever annual rate of increase. The weakness of the recovery was underscored by the

1% drop in the Gross Domestic Product for accommodation and food services, after a steep decline of 11% in 1991. The state of no growth in the hospitality industry indicated that the domestic travel market was still affected by economic uncertainties in 1992.

However, the weak economic performance at the national level hides the fact that the two westernmost provinces benefitted from healthier economies than the rest of the provinces. Together, they collected nearly a third of Canada's domestic travel receipts

► Continued from page 2

in 1992 (Table 1). The lion's share still went to Ontario, 31% of domestic expenditures were for trips destined to that province. Quebec and British Columbia came in second place with both

17% of the domestic travel market. Alberta followed closely with a 14% market share.

Mostly Within Provincial Boundaries

The majority of domestic trips were confined to the province of residence (Chart 1).

Intraprovincial travel outweighed interprovincial travel in terms of both volumes and spending (Table 2). Nationally, domestic overnight travel spending reached \$13 billion in 1992 (Table 3). Business travel contributed \$5 billion, the pleasure market added another \$4 billion, visiting friends and relatives (VFR) provided \$3 billion, while other travel purposes accounted for less than a billion dollars in overnight expenditures.

The remainder of the article will concentrate on overnight domestic travel.

Canadian Demographics

The average Canadian (15 years and over) travelling in Canada on an overnight trip in 1992 was likely to be 40 years old, travelling with another person for three nights, some 425 km away from home. Other features included more person-trips being reported by males aged 15 and over (44%), married (55%), travelling without children (67%), by car (88%), on a week-end (60%), during the summer (36%) in order to visit friends and relatives (42%). The length of an overnight trip varied by destination. Within the province of residence, trips averaged three nights, some 270 km away from home. Between provinces, stays usually lasted six nights, covering longer distances, an average one-way distance of 1,190 km.

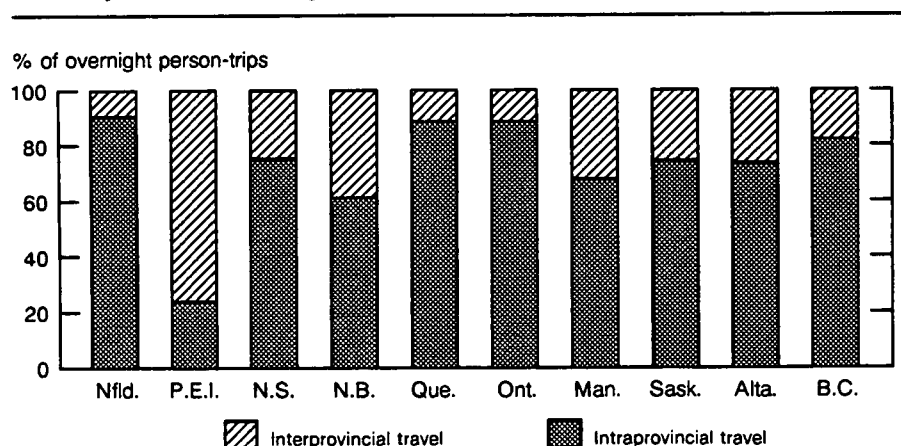
Young adults reported more overnight trips to visit friends and relatives than for pleasure. One in four VFR person-trips was accounted for by young baby-boomers aged 25 to 34 years (Chart 2). Older baby-boomers (35-44) represented a third of all overnight business trips in Canada and made up the largest segment of pleasure travel to Canada. The largest segment of the Canadian population, the baby-boomers, represented the majority of

Table 1
Travel Receipts by Province, 1992

Province of receipt	Domestic Travel		International Travel	Total	Share of Gross Domestic Product
	Residents of home province	Residents of other provinces	Foreign residents in each province	Canadian travel receipts	
	millions of dollars				%
Canada - Total Travel	12,186¹	3,836²	8,059³	28,484⁴	4.1
Atlantic Provinces	312	101			
Prince Edward Island	17	56	321	1,716	4.0
Nova Scotia	358	169			
New Brunswick	225	158			
Quebec	2,305	475	1,182	3,962	2.5
Ontario	4,204	780	2,900	7,884	2.9
Manitoba	561	270	102	933	3.9
Saskatchewan	534	229	64	827	4.2
Alberta	1,641	668	648	2,957	4.0
British Columbia	2,031	721	1,556	4,307	5.0

¹ The Canadian Travel Survey does not cover residents of Yukon and N.W.T.
² The Canada total exceeds the sum of the provinces because it includes Yukon, N.W.T. and a "not stated" category.
³ The Canada total includes spending in Yukon, N.W.T. and international passenger fares paid to Canadian carriers as well as crew spending.
⁴ The Canada total includes \$4,403 million spent in Canada by Canadians when travelling to a foreign destination.
 Sources: Canadian Travel Survey and International Travel Survey, special tabulations; Statistics Canada Cat. No. 13-213.

Chart 1
Travel by Province of Origin, 1992



Source: Canadian Travel Survey.

▶ Continued from page 3

domestic travel in 1992 (Table 4). The middle-aged market (45-54) prioritized pleasure trips but the pattern reverted to VFR with the mature market.

A Portrait by Purpose of Trip

The typical Canadian adult travelling for one or more nights in Canada to visit friends or family in 1992 was more likely to be female (47%), married (48%),

Table 2
Domestic Travel by Canadians, 1992

	Person-trips	Share	Reallocated Spending ¹	Share
	'000	%	millions of \$	%
Domestic Destinations:				
Overnight Travel	84,043	100	12,794	100
Intraprovincial	69,598	83	9,067	71
Interprovincial	14,445	17	3,727	29
Sameday Travel	73,813	100	3,228	100
Intraprovincial	71,011	96	3,119	97
Interprovincial	2,802	4	109	3

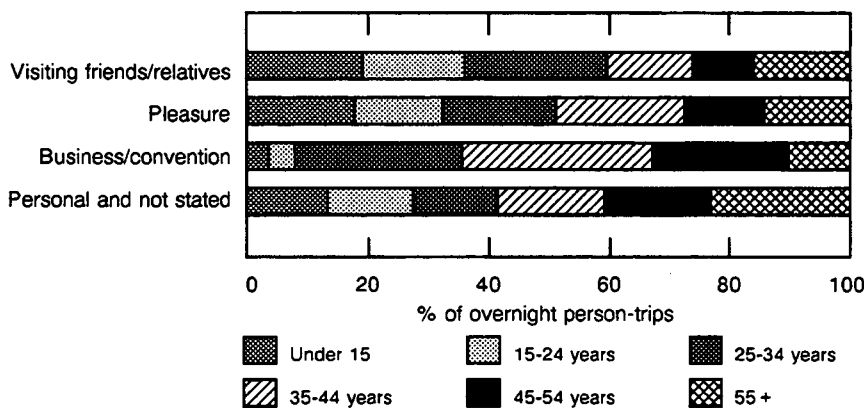
¹ Excludes \$4,403 million spent in Canada by Canadians when travelling to a foreign destination.
Source: Canadian Travel Survey.

Table 3
Overnight Domestic Travel by Purpose of Trip, 1992

Purpose	Person-trips	Share	Reallocated Spending	Share
	'000	%	\$000,000	%
Overnight Travel	84,043	100	12,794	100
Visiting Friends or Relatives	35,437	42	3,239	25
Pleasure	29,998	36	4,077	32
Business or Convention	12,300	15	4,599	36
Personal/Not stated	6,309	8	870	7

Source: Canadian Travel Survey.

Chart 2
Distribution of Age Groups, by Purpose of Trip, 1992



Source: Canadian Travel Survey.

Table 4
Overnight Domestic Travel by Age, 1992

Age	Person-trips	Share
	'000	%
Overnight Travel	84,043	100
< 15	13,354	16
15-19	5,055	6
20-24	6,818	8
25-34	18,171	22
35-44	16,512	20
45-54	11,440	14
55-64	6,686	8
65+	6,007	7

Source: Canadian Travel Survey.

travelling without children (62%), by car (91%), on a week-end (68%), during the summer (30%). The proportion of women reporting overnight travel to visit friends and relatives was higher than for other purposes (Chart 3).

The main activities reported, apart from visiting friends and relatives, were focused around shopping (31%) and sightseeing (14%). These travellers spent most of their stays at the homes of friends and relatives (86%). Person-trips undertaken to visit friends and relatives were much more numerous than those for business reasons, but they generated less spending. Ontario attracted some 28% of VFR travel expenditures, with British Columbia in second position at 19%.

The Pleasure Travel Market

The profile of the adult Canadian on an overnight pleasure trip in Canada could be drawn as follows: male (44%), married (56%), travelling without children (63%), by car (92%), on a week-end (68%), during the summer (48%). The concentration of pleasure travel during the summer months is a reflection of the practice of taking

► Continued from page 4

major domestic vacations during the period of the year when the weather is warmer and most suited to outdoor activities (Chart 4).

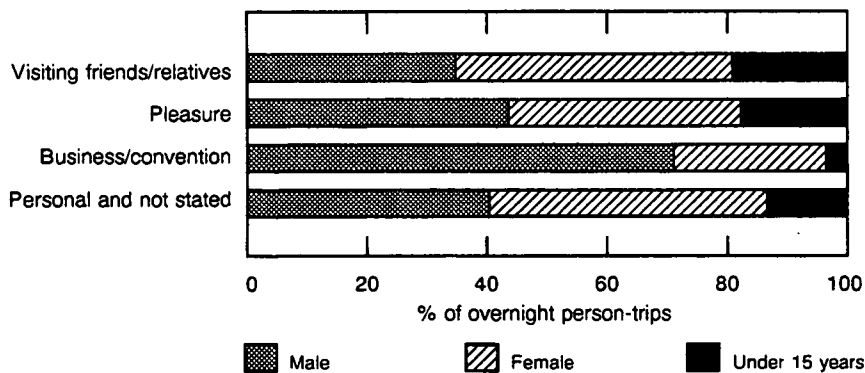
Visiting friends and relatives was still at the top of the list (43%), followed by sports and outdoor activities (38%), shopping (28%) and sightseeing (27%). These active travellers covered shorter distances (365 km away from home) than for other trip

purposes, for a very slightly longer period of time. Secondary homes (private cottages) accommodated 32% of the nights spent on pleasure travel, another significant portion being spent in the homes of friends and relatives (20%) (Table 5). Camping represents 21% of all pleasure night stays in 1992. Ontario grabbed 31% of the overnight domestic pleasure spending in Canada, followed by British Columbia with a 21% share.

Doing Business in Canada

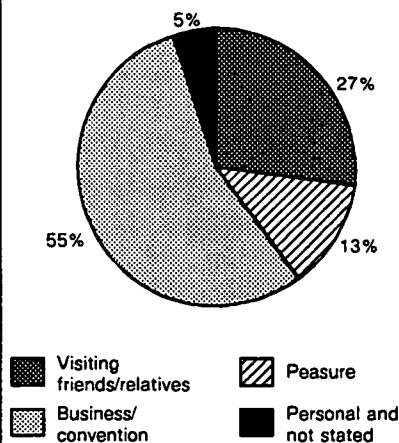
Canadian business people travelled alone, unlike other types of travellers. They were predominantly male (71%), married (73%), 63% with post-secondary education and half of them in managerial or other professional occupations. Business trips were longer in distance but shorter in duration. The average trip lasted just under 3 nights in Canada, some 630 km away from home. These travellers were the backbone of the domestic air travel industry (Chart 5).

Chart 3
Overnight Person-trips, by Purpose of Trip and by Type, 1992



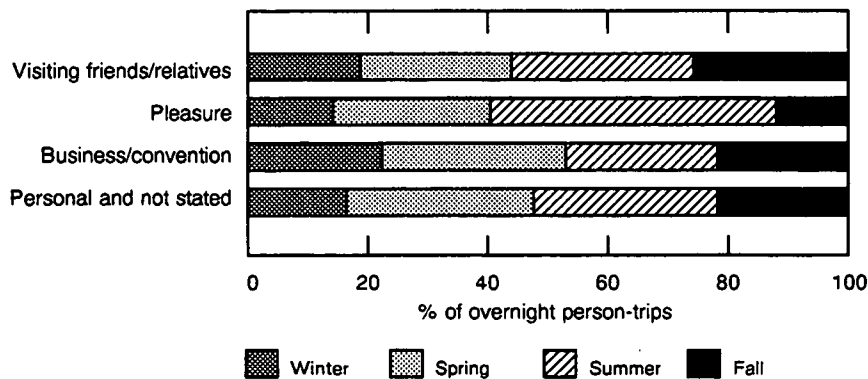
Source: Canadian Travel Survey.

Chart 5
Air Transportation by Purpose of Trip, 1992



Source: Canadian Travel Survey.

Chart 4
Seasonal Distribution by Purpose of Trip, 1992



Source: Canadian Travel Survey.

For every dollar spent on overnight business travel in Canada, 29% went to Ontario, 18% to British Columbia and only 16% to Quebec. Alberta was not far behind the major players, capturing 15% of overnight business spending. There are no large shifts in the seasonal variation of business travel. Business people travelled more in the second quarter of 1992 (31%), with the last quarter of the year being the slowest (22%). Although such travel represented only 15% of domestic overnight person-trips in 1992, it injected some \$5 billion in the Canadian economy (Table 6).

► Continued from page 5

Heavy users of hospitality services, these travellers grasped 54% of hotel nights. Most Canadian overnight business trips originated from (28%) and ended in Ontario (30%). This type of travel accounted for a larger share of domestic travel to large urban centres (CMAs) than average.

Most Popular City: Toronto

Attracting over 5 million overnight person-trips in 1992, Toronto was the single largest urban destination in Canada (Chart 6). The average visit lasted three nights, for a party of two travelling 576 km away from home. Three out of every four overnight person-trips to Toronto are made by Ontario residents. Toronto did not attract a lot of interprovincial travel as a destination; its major out-of-province domestic market was made up of 604,000 Quebecers in 1992.

Visiting friends and relatives was the most cited reason for making the trip, as it represented 46% of overnight-trips to Toronto. Business came in second position with a 26% share. Pleasure trips accounted for 19%. Apart from visiting friends and relatives, shopping was the most reported activity (35%) on trips to Toronto in 1992, followed by fine dining at 19%. As expected, most nights were spent in the homes of friends and relatives (62%), while hotels represented 26% of nights on trips to Toronto.

With over 3 million overnight domestic person-trips in 1992, Montreal placed second as the most popular urban destination in Canada. The average overnight visit to Montreal lasted three nights, for a party of two travelling some 470 km away from home. Three out of every five overnight Canadian person-trips to Montreal

Table 5
Pleasure Travel by Type of Accommodation, 1992

Accommodation	Person-nights	Share	Reallocated Spending	Share
	'000	%	\$'000,000	%
Overnight Pleasure Travel	106,674	100	4,077	100
Commercial:				
Hotel	11,731	11	1,312	32
Motel	8,140	8	811	20
Camping	22,760	21	626	15
Commercial Cottage	5,593	5	245	6
Non-commercial:				
Friends or Relatives	20,847	20	1,002	25
Private Cottage	34,100	32	649	16
Other/Not Stated:	3,503	3	200	5

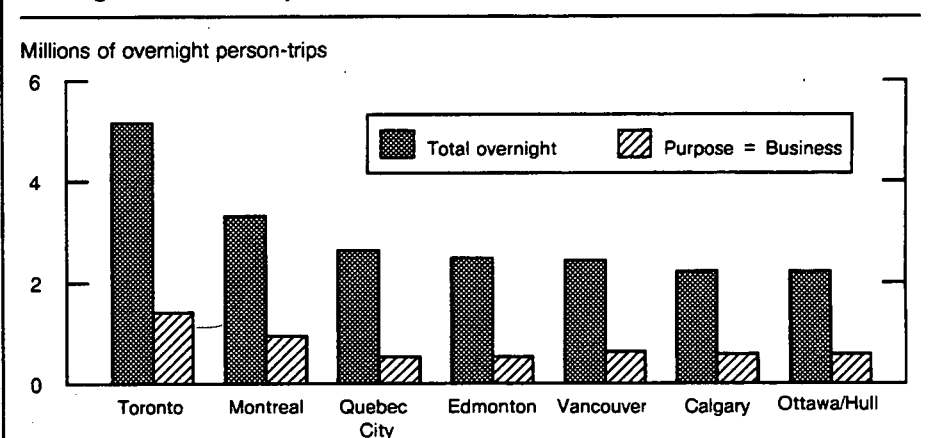
Source: Canadian Travel Survey.

Table 6
Business Travel by Mode of Transportation, 1992

Transportation	Person-trips	Share	Reallocated Spending	Share
	'000	%	\$'000,000	%
Overnight Business Travel	12,300	100	4,599	100
Air	2,990	24	2,559	56
Automobile	8,651	70	1,898	41
Rail	175	1	56	1
Bus	278	2	49	1
Other/Not Stated	207	2	33	1

Source: Canadian Travel Survey.

Chart 6
Overnight Travel to Top Seven Urban Centres, 1992



Source: Canadian Travel Survey.

► Continued from page 6

were made by residents of the province of Quebec. Montreal's major out-of-province domestic market came from Ontario, 1.1 million overnight person-trips in 1992. The automobile was the primary mode of transportation for 77% of these. Only 11% of the trips involved air travel, compared to Toronto's 18%. The most cited reason for making the trip: visiting friends and relatives, 48% of person-trips. Business came in second position with a 28% share, pleasure trips accounting for 16%.

Apart from visiting friends and relatives, shopping was the most reported activity on trips to Montreal in 1992 (30% of person-trips), followed by dining at high quality restaurants (25%). Two out of three nights were spent in the homes of friends and relatives. Hotel stays represented 23% of nights on trips to Montreal. Travel to urban destinations is less seasonal than overall travel. In 1992, overnight travel to Toronto was spread evenly across the season unlike Montreal which saw spring travel (29%) outnumber its summertime domestic market (24%).

Seasonal Patterns : Winter Travel

The winter of 1992 will be remembered for the contrast in temperatures we witnessed. In the first months of the year, the western half of the country enjoyed spring-like conditions, while below normal temperatures ruled in the east. During the months of January to March 1992, 23% of Canadians aged 15 and over made at least one overnight trip of more than 80 km somewhere in Canada. Most likely to travel within Canada during the winter months were Canadians aged 35 to 44. Least

likely to venture more than 80 km away from home on an overnight trip were Quebec residents (17% of the population). Residents of Alberta and Saskatchewan were more prone to travel, 34% and 39% respectively of the population in each province.

The first quarter, the slowest period for domestic travel, registered 14.7 million overnight person-trips (Table 7). Two out of three of these trips were made during the week-end, some 390 km away from home and lasted an average of three nights. Ontarians made 36% of these person-trips, followed by Quebec at 20%. In third position, with 13% of the domestic market by province of origin, Alberta recorded more travel than British Columbia residents (12%) during the coldest period of the year.

Reflecting less seasonality than other reasons for travelling, business and convention travel represented one out of every five domestic overnight person-trips in 1992. Residents of Nova Scotia

were most likely to travel for business reasons in winter, with 30% of all overnight travel originating from that province. Pleasure travel, still a priority for Canadians during this period of the year, accounted for 29% of the overall domestic market. Most likely to travel overnight for pleasure were residents of Ontario, 38% of trips originating from that province during winter were for that purpose.

Interprovincial Travel Lowest in Winter

There was less travel between provinces during this period than in other quarters of the year. Overnight travel between provinces reached 2.4 million person-trips: 28% of these were done by Ontarians, 17% by Albertans, with Quebec in third place with a 16% share. Ontarians travelled to other provinces mainly for pleasure (34%) and to visit friends and relatives (33%). Business travel came in third place, representing 27% of interprovincial

Table 7
Winter Domestic Travel

First Quarter 1992	Overnight Person-trips	Share	Reallocated Spending	Share
	'000	%	\$'000,000	%
Travel Characteristics	14,661	100	2,446	100
Intraprovincial	12,254	84	1,730	71
Interprovincial	2,407	16	716	29
Duration				
1 Night	4,605	31	380	16
2 Nights	5,719	39	580	24
3 Nights	1,886	13	526	22
4 Nights	840	6	258	11
5-9 Nights	1,203	8	470	19
10 Nights or More	408	3	233	10
Purpose				
Visiting Friends or Relatives	6,643	45	515	21
Pleasure	4,234	29	575	24
Business or Convention	2,740	19	1,154	47
Personal/Not Stated	1,044	7	202	8
Transportation				
Automobile	12,197	83	1,268	52
Air	1,290	9	1,016	42
Bus	737	5	114	5
Rail/Other/Not Stated	437	3	48	2

Source: Canadian Travel Survey.

► Continued from page 7

trips originating from Ontario. By comparison, business trips were on top of the agenda for Albertans and Quebecers travelling to other provinces during this period of the year, 33% and 55% respectively.

When asked what activities were included in their overnight trip to a domestic destination during this period of the year, most Canadians cited visiting friends and relatives at the top of the list (Chart 7). Downhill skiing was reported on 1.4 million overnight person-trips in the winter of 1992 while 0.7 million overnight person-trips involved cross-country skiing. Most of the cross-country skiing was done by Quebec and Ontario residents in the winter of 1992 (45% and 44% respectively of the Canadian market). Ontarians were most likely to indulge in downhill skiing (46% of the Canadian market) while Quebecers represented 25% and Albertans 13% of the domestic share.

Stifled by Winter, Travel Picked up with the Thaw

The pattern of warm weather in the west and cool temperatures in the east prevailed as the spring season progressed. A trend to wet weather conditions also became apparent. During the months of April to June 1992, one in three Canadians (aged 15+) reported having made at least one overnight trip of more than 80 km in Canada, representing some 22.6 million overnight person-trips (Table 8). During that period, trips lasting only one night represented 28% of the total, while short journeys of 2 nights captured 42% of the market. Two out of every three person-trips were made during the week-end, some 410 km away from home and lasted three nights on average.

Residents of Ontario accounted for 39% of all overnight person-trips in the second quarter of 1992, while the second place went to Quebec residents with a share of 20%. Again in the second quarter of 1992, Alberta outpaced

British Columbia, with 12% of the domestic market originating in that province, while the Pacific Coast province accounted for 11% of the Canadian market.

Visiting Family/Friends on Top of Spring Agenda

During the second quarter of 1992, pleasure travel by Canadians on overnight trips was more popular than in the first quarter. Exceptionally, pleasure travel outranked social visits for residents of Manitoba, Alberta and British Columbia during the second quarter. Business trips represented 17% of all domestic overnight trips. Residents of British Columbia were more likely to travel for business reasons in the second quarter of 1992, 25% of all overnight person-trips originating from that province. Residents of Nova Scotia took to air travel more than other Canadians, 13% of their overnight person-trips were by air.

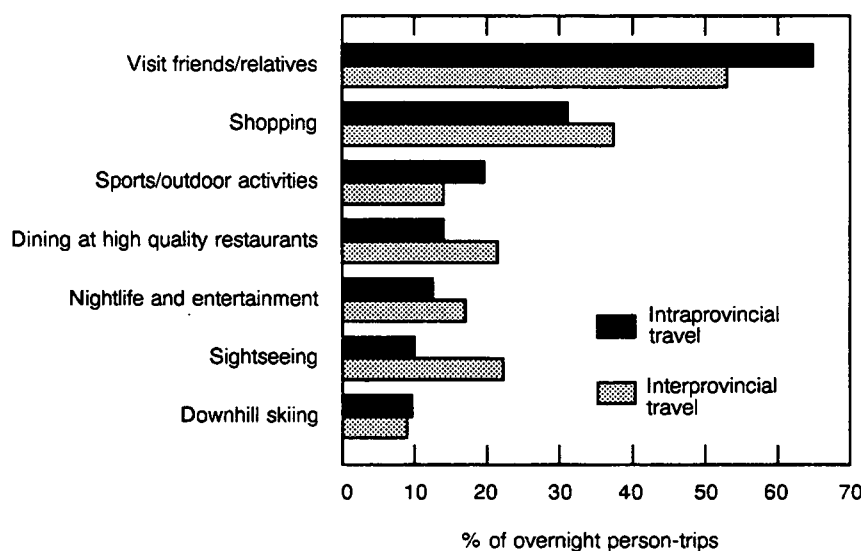
Trips of one or more nights with destinations within the province of residence totalled 19.3 million during the spring of 1992 while travel between provinces posted 3.3 million trips. Residents of Ontario accounted for 41% of all intra-provincial overnight travel but only 25% of trips to other provinces (Chart 8).

When travelling, Canadians spent a lot of time with friends and family. In the second quarter of 1992, the main activity was visiting friends and family, 58% of overnight person-trips. They also love to shop as was reported on 24% of these trips. Participating in sports or outdoor activities as well as sightseeing were the next most common pursuits (16% each).

Summer of 1992: Poor Weather for Travel in Canada

Canadians experienced an unusually cold and wet summer in 1992. Only British Columbia

Chart 7
Activities While Travelling in Canada, First Quarter, 1992



Note: Travellers can participate in more than one activity on a trip. Therefore, the sum of activities exceeds the total person-trips.
Source: Canadian Travel Survey.

Table 8
Spring Domestic Travel

Second Quarter 1992	Overnight Person-trips	Share	Reallocated Spending	Share
	'000	%	\$'000,000	%
Travel characteristics	22,608	100	3,136	100
Intraprovincial	19,260	85	2,233	71
Interprovincial	3,348	15	903	29
Duration				
1 Night	6,356	28	538	17
2 Nights	9,431	42	822	26
3 Nights	2,905	13	431	14
4 Nights	1,082	5	295	9
5-9 Nights	1,963	9	575	18
10 Nights or More	873	4	474	15
Purpose				
Visiting Friends or Relatives	9,038	40	792	25
Pleasure	7,848	35	841	27
Business or Convention	3,772	17	1,263	40
Personal/Not Stated	1,951	9	238	8
Transportation				
Automobile	19,900	88	1,899	61
Air	1,573	7	1,034	33
Bus	614	3	102	3
Rail	294	1	79	3
Other/Not Stated	228	1	23	1

Source: Canadian Travel Survey.

while only 41% of Quebeckers did so during the busiest period of the year.

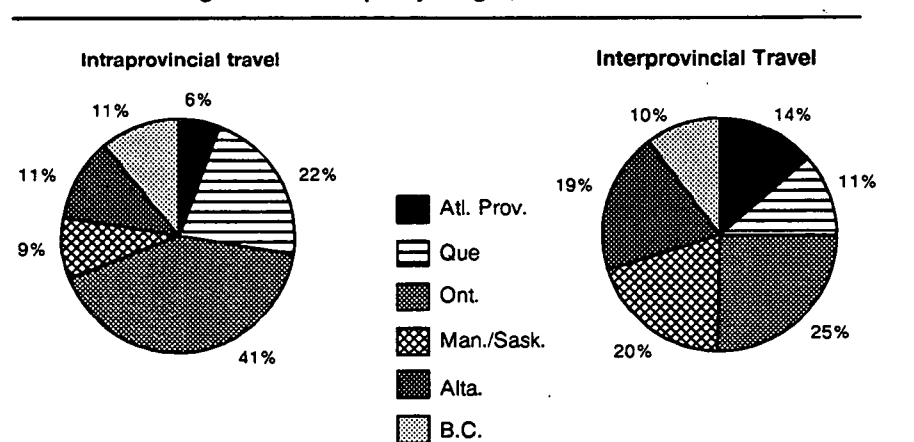
Despite the uncooperative weather, holiday plans were not shelved, as 2.7 million person-trips lasted ten nights or more in the third quarter of 1992 (Table 9). The most popular trips lasted only two nights, representing a third of all overnight person-trips during this period. Weekend trips made up 55% of the overnight travel in the summer. Pleasure trips were the most popular. Trips for the purpose of visiting family or friends came in second place, contrary to the ranking observed in other seasons. During the third quarter of 1992, business trips reached 3.1 million, representing the lowest seasonal share of domestic overnight trips.

Rubber Tire Market Strongest in Summer

Automobile travel accounted for nine out of ten overnight trips in the third quarter of 1992. Other modes of travel remained marginal, with air travel in second place, accounting for only 4.5%. The average distance travelled on a domestic overnight trip was of 460 km away from home, the longest distance reached compared to other periods of the year. These further distances translated into trips lasting four nights on average.

Summer travel involved varied activities, with visiting friends and relatives still at the top of the agenda (59% of overnight person-trips), followed by shopping (28%), sightseeing (26%) and participation in sports and outdoor activities (25%). Residents of the Atlantic provinces were more likely to indulge in shopping than other Canadians. A third of Manitobans travelling overnight in the summer reported participating in sports or outdoor activities, representing the highest participation rate among provinces.

Chart 8
Share of Overnight Person-trips by Origin, Second Quarter, 1992



Source: Canadian Travel Survey.

► Continued from page 8

enjoyed above normal summertime temperatures. Despite the unseasonable weather, almost half of the Canadian population aged 15 and over took an overnight trip to a Canadian destination in the summer. Most likely to travel during the summer were

baby-boomers (52%). A higher proportion of seniors (35%) travelled in the summer than during any other period of the year. Summer travel was more pervasive among Westerners than in Central or Atlantic Canada: 62% of Saskatchewan residents participated in overnight travel

► Continued from page 9

Trips of one or more nights with destinations within the province of residence totalled 24.4 million, generating some \$3.2 billion in travel expenditures. The largest proportion of night stays on intraprovincial travel occurred

in the homes of friends and relatives, closely followed by private cottages (Chart 9). Travel outside the home province was mostly confined to nights spent in the homes of friends and relatives, while hotels were a distant second choice.

Fall Travel Patterns

Highly variable weather conditions prevailed in the autumn, as the cold summer was followed by early snowfalls in October across Canada. During the months of October to December 1992, 6.4 million Canadians took an overnight trip 80 km away from home somewhere in Canada, representing some 16.7 million person-trips (Table 10). Trips lasting only one night accounted for 30% of the total while another third lasted only two nights (Chart 10). Residents of Ontario accounted for 33% of all overnight person-trips in Canada.

Most popular in this period of the year were trips to visit family and friends. In fact, this purpose of trip accounted for over half of the trips made during the fourth quarter while it only represented two out of five trips during other seasons. Pleasure travel represented only one out of five trips during the fourth quarter of 1992. During the same period, business trips represented 16% of all domestic overnight trips, seven out of ten of these in the home province.

In the fourth quarter of 1992, travel by automobile represented 87% of all overnight trips, while Canadian air travel made up 7% of the total. Three quarters of air trips were to out-of-province destinations. In third position came the bus with a 4% share of the overnight market.

Fall Travel Mostly Within Own Province

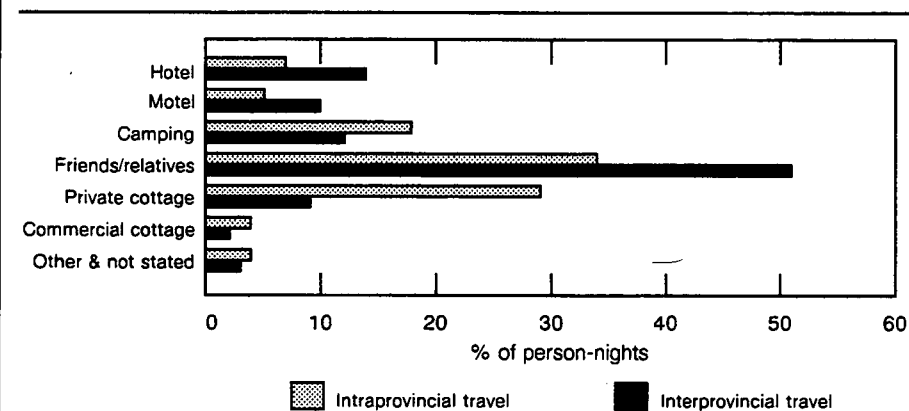
Most overnight trips in the fourth quarter were confined within the travellers's provincial boundaries and were undertaken to visit friends and relatives. Fall activities were influenced by this fact as 69% of in-province travel involved visiting friends and relatives as an

Table 9
Summer Domestic Travel

Third Quarter 1992	Overnight Person-trips	Share	Reallocated Spending	Share
	'000	%	\$'000,000	%
Travel Characteristics	30,027	100	4,589	100
Intraprovincial	24,400	81	3,207	70
Interprovincial	5,627	19	1,383	30
Duration				
1 Night	6,695	22	605	13
2 Nights	10,090	34	871	19
3 Nights	4,041	13	560	12
4 Nights	1,944	6	297	6
5-9 Nights	4,526	15	1,152	25
10 Nights or More	2,730	9	1,104	24
Purpose				
Visiting Friends or Relatives	10,703	36	1,140	25
Pleasure	14,286	48	2,132	46
Business or Convention	3,085	10	1,059	23
Personal/Not Stated	1,953	7	254	6
Transportation				
Automobile	27,406	91	3,256	71
Air	1,354	5	1,063	23
Bus	719	2	151	3
Rail	159	1	61	1
Other/Not Stated	388	1	59	1

Source: Canadian Travel Survey.

Chart 9
Person-nights by Accommodation Types, Third Quarter, 1992



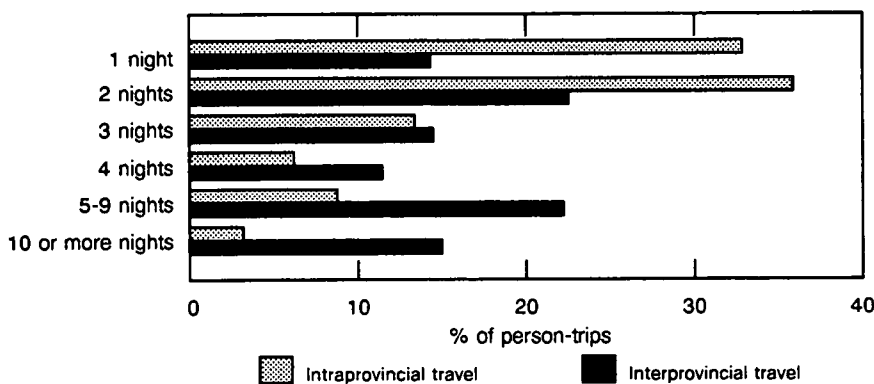
Source: Canadian Travel Survey.

Table 10
Fall Domestic Travel

Fourth Quarter 1992	Overnight Person-trips	Share	Reallocated Spending	Share
	'000	%	\$'000,000	%
Travel Characteristics	16,747	100	2,622	100
Intraprovincial	13,684	82	1,897	72
Interprovincial	3,062	18	725	28
Duration				
1 Night	4,937	29	475	18
2 Nights	5,587	33	608	23
3 Nights	2,258	13	364	14
4 Nights	1,198	7	297	11
5-9 Nights	1,866	11	541	21
10 Nights or More	900	5	338	13
Purpose				
Visiting Friends or Relatives	9,054	54	792	30
Pleasure	3,629	22	529	20
Business or Convention	2,704	16	1,122	43
Personal/Not Stated	1,361	8	176	7
Transportation				
Automobile	14,581	87	1,495	57
Air	1,198	7	963	37
Bus	608	4	97	4
Rail	191	1	40	2
Other/Not Stated	168	1	27	1

Source: Canadian Travel Survey.

Chart 10
Person-trips, by Trip Duration, Fourth Quarter, 1992



Source: Canadian Travel Survey.

► Continued from page 10

activity. Shopping was the second most popular activity during the pre-Christmas period, representing 27% of trips within the province of origin. Homes of friends and relatives were used as accommodation on 65% of these

trips, which lasted an average of 3 nights, about 270 km away from the place of residence.

Interprovincial travel accounted for only one out of five overnight trips during this period. On a person-trip basis, the average duration was of five nights and

covered a one-way distance of more than a thousand km. The largest number of interprovincial trips in the last three months of 1992 originated from Alberta, half of them destined to British Columbia. The Pacific Coast province returned the favour by choosing Alberta on 63% of the trips to other parts of Canada. In the meantime, Ontario ranked second, behind Alberta, in terms of number of trips to other provinces, 64% of them destined to Quebec. Ontario was also the favourite out-of-province destination on 85% of interprovincial travel made by Quebec residents during this period.

Home Province Dominates Leisure Travel

In the wrap-up on the Canadian Travel Survey, respondents are asked if they have taken at least one overnight non-business trip of 80 km or more away from home in 1992. This question allows the development of annual leisure travel participation rates for the Canadian population by destination. When Canadians travel to pursue a non-business activity, they more than likely stay within the limits of their home province. In 1992, there were 21.2 million Canadians aged 15 and over. Of these, 13.3 million or 63% of the Canadian population took at least one overnight domestic leisure trip (Table 11).

Intraprovincial trips continued to dominate the market but Canadians travelled more to the United States than to other provinces. The number of persons reporting an overnight non-business trip to the U.S. in 1992 reached 6.3 million or 30% of the population, while only 23% picked another province for their travel. Overseas destinations attracted less than one out of every ten Canadians.

Table 11
Participation in Overnight Non-business Travel by Province, 1992

Province of residence	Participation rate by destination					
	Population (15 +)	Canada	Same Province	Other Provinces	United States	Other Countries
	'000	%				
Canada	21,183	63	56	23	30	8
Newfoundland	441	65	61	16	7	H
Prince Edward Island	98	65	30	58	22	H
Nova Scotia	697	64	54	36	20	H
New Brunswick	562	63	49	36	29	H
Quebec	5,442	58	53	14	22	8
Ontario	7,913	60	55	18	36	11
Manitoba	810	64	50	36	32	H
Saskatchewan	719	84	75	53	29	5
Alberta	1,917	79	63	51	29	6
British Columbia	2,583	65	58	20	34	11

H The coefficient of variation of the data being greater than 25% at one standard deviation, the data cannot be released.

Source: Canadian Travel Survey.

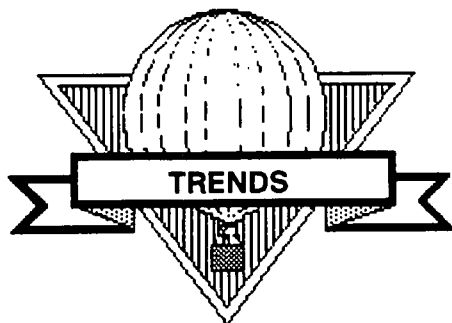
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The Globalization Challenge

Identifying and meeting market demands are ever present business challenges for the Canadian tourism industry. Faced with globalization, the Canadian tourism industry cannot operate effectively without relevant knowledge of the travel market to develop successful growth strategies.

Traditional domestic travel patterns are giving way to more fragmented travel markets. Baby-boomers remain the dominant cohort and should provide marketers with interesting opportunities as they move into their middle years. The seniors market in Canada is increasingly targeted by the tourism industry which sees this population segment as the ideal customer.

As the Canadian population gradually gets older, businesses must make adjustments in the way they cater to travellers' needs. Understanding the unique features of the Canadian market is essential to the Canadian tourism industry's success. These changes will also affect our foreign travel markets. As we look to the future, the economic impact of tourism and travel-related activities will be key to the health of our economy. A growing travel and tourism sector translates into more jobs for Canadians and stimulates a variety of related sectors in the Canadian economy.



Travel Between Canada and Other Countries, Third Quarter 1993

Non-Resident Travel to Canada Increasing

The volume of non-resident travel into Canada rose in the third quarter of 1993. Trips of one or more nights to Canada by U.S. residents increased 2.4% from the same period in 1992. At the same time, comparable trips by residents of all other countries increased by 7.3%. In terms of major overseas markets, the increased flow of travel was most notable from France and Germany (See Touriscope Indicators on page 14).

Less Foreign Travel by Canadians During the Summer of 1993

Foreign overnight travel by Canadian residents declined from the third quarter of 1992. The decrease was brought about by a significant fall of 10.7% in the

number of automobile trips to the United States during this period. Overseas destinations fared better as the number of Canadian residents returning from countries other than the United States reached an unprecedented volume for the third quarter.

Monthly Trends

Seasonally adjusted data, which highlight monthly trends, show that non-resident overnight travel to Canada increased in September 1993 (Chart 11). On the other hand, outbound Canadian travel remained stable compared to the previous month.

For further information, contact Ruth McMillan (613-951-1791), International Travel Section, Education, Culture and Tourism Division.

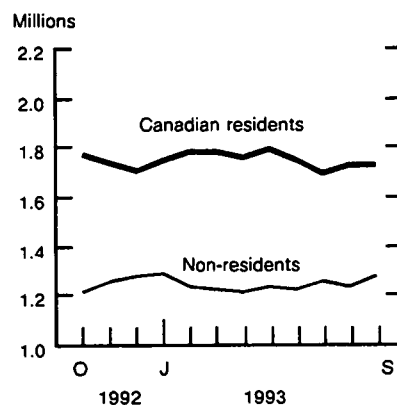
Travel Price Index, Third Quarter 1993

Between the third quarters of 1992 and 1993, the Travel Price Index (TPI) for Canada increased 2.1% (See Touriscope Indicators on page 14). Since the fourth quarter of 1992, the twelve-month rates of increase have fluctuated between 2.1% and 3.3%.

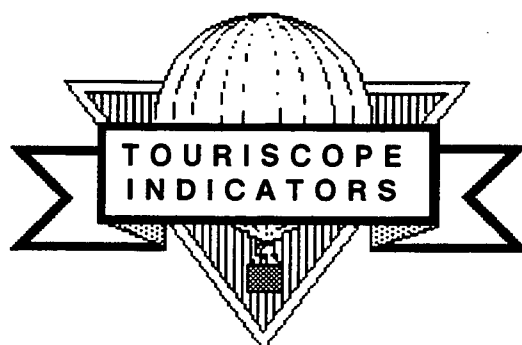
In comparison, the All-Items Consumer Price Index (CPI) increased 1.7% over the third quarter of 1992, about the same rate as in the second quarter of 1993 (1.8%). The rise over a twelve-month period in overall consumer prices has been below the rate of increase witnessed for the TPI since the fourth quarter of 1992.

Among components of the TPI, interurban transport registered the largest increase, 4.3% over the previous year. Photographic goods and services were the only element to show a decline in the twelve-month period ending in the third quarter of 1993 (-0.3%).

Chart 11
Trips of One or More Nights
Between Canada and Other
Countries
Seasonally adjusted



Source: Statistics Canada, Cat. No. 66-001.



		Third Quarter 1993	% Change	
			Previous Quarter	Previous Year
VISITORS TO CANADA				
From United States	T	12,809	52.1	3.1
Overnight visits(p)	T	5,438	74.3	2.4
By auto	T	3,932	90.1	1.5
From Overseas	T	1,587	75.3	6.3
Overnight visits(p)	T	1,420	72.0	7.3
Top Seven Countries				
United Kingdom	T	262	64.1	4.4
France	T	187	99.6	15.5
Germany	T	177	96.9	20.5
Japan	T	171	66.9	2.5
Italy	T	49	130.8	1.6
Hong Kong	T	48	65.4	-5.8
Switzerland	T	43	117.0	7.8
CANADIANS OUTSIDE CANADA				
To United States	T	20,193	13.8	-13.6
Overnight visits(p)	T	6,207	48.0	-8.0
By auto	T	4,927	69.1	-10.7
To Overseas	T	865	19.0	3.5
INDUSTRY SECTOR				
Airline passengers (Level I)	T	6,144	10.7	11.3
Airline passenger-km (Level I)	M	13,786	22.6	-1.9
Inter-city bus passengers	T	3,204	17.6	-11.6
Restaurant receipts	M	5,303	5.1	5.1
PRICES				
1986 = 100 (not s.a.)				
Travel price index		136.0	2.3	2.1
Consumer price index		130.6	0.4	1.7
Restaurant meals		137.6	0.2	1.2
Inter-city transportation		135.2	2.7	4.3
Gasoline		119.2	-0.2	-3.4
ECONOMIC				
Gross domestic product, 1986 prices (s.a.)	M	518,732	0.5	2.9
Amusement and recreation	M	3,997	-2.6	-2.4
Accommodation and food services	M	11,634	0.5	3.9
Personal disposable income per capita (s.a.)		17,286	0.8	2.1
LABOUR FORCE				
Labour force (s.a.)	T	13,984	0.9	1.6
Unemployed	T	1,588	4.3	2.4
Employed	T	12,395	0.4	1.5
Accommodation and food services (not s.a.)	T	832	6.8	5.1
EXCHANGE RATES				
In Canadian Dollars:				
American Dollar		1.3039	2.7	8.5
British Pound		1.9620	0.7	-14.2
Japanese Yen		0.01235	6.8	28.2
German Mark		0.7786	-0.9	-5.3
French Franc		0.2244	-3.6	-7.5

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