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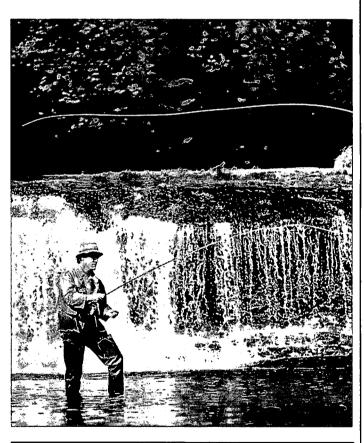
## Sports Participation Travel Between Atlantic Canada and New England

by Ruth McMillan

Canada and the United States not only share the world's longest border, both countries' residents are important players in the other's main foreign travel market. Canadian residents made 18.6 million overnight trips to the United States in 1992, compared with 11.8 million trips north of the border for American residents (Graph 1). Half of the U.S. overnight person-trips to Canada originated from the East North Central and Middle Atlantic regions in 1992 (Graph 2). The source of half of overnight Canadian travel to the United States was within the limits of Ontario, the most populous province (Graph 3).

Using data collected through Statistics Canada's International Travel Survey (ITS)1, this article profiles specific segments of travellers between two regions of the eastern seaboard - Atlantic Canada and New England - focusing on sports participation travel and the perceived level of service on both sides of the border<sup>2</sup>. This type of analysis could be useful to marketers looking for the right market niche in a region. Tourism operators catering to travel markets in both countries are facing an uphill battle to attract a larger share of a shrinking pleasure market while keeping ahead of changing consumer needs.

When travelling, some people are looking for a different experience. This can take many forms, from canoeing to white-water rafting, from golfing to hunting. Sports participation travel is defined here



## Touriscope

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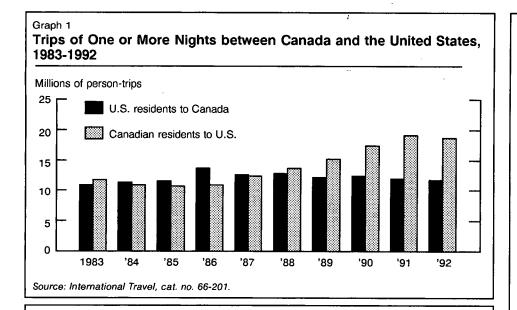
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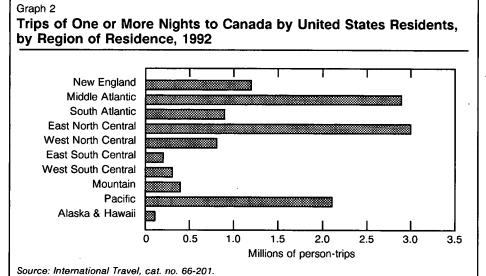
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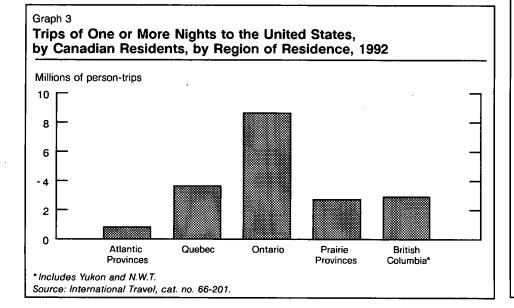


Person-trips of one or more nights are discussed throughout this article.

Each travelling party reports only one set of activities as well as one set of service quality perceptions for the entire trip undertaken by the group.









**Editor:** Lise Beaulieu-Caron Tel: 613-951-1673 Fax: 613-951-2909

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Minister of Industry, 1994

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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.

as non-business travel of one or more nights' duration where at least one person in the travelling party participated in sports or outdoor activities listed in the ITS questionnaire, such as:

- swimming;
- other water sports;
- hunting or fishing;

- cross country skiing;
- downhill skiing; and
- other sports.

For comparison purposes, some references are made to nonsports participation travel, that is, non-business travel of one or more nights' duration where the activities participated in exclude sports and outdoor activities.

## Table 1 Non-business Trips of One or More Nights, Residents of New England to Atlantic Canada, 1990-1992

Year	Sports Participation Trips	Annual Change	Non- Sports Participa- tion Trips	Annual Change	Total Non- Business Trips	Annual Change
		%		%		%
1990	75,900		180,900		256,800	
	79,200	4.3	201,700	11.5	280,900	9.4
1991	79,200	4.3	201,700		200,300	

Table 2					
A Profile of New	<b>England</b>	Travel to	<b>Atlantic</b>	Canada,	1992

	Sports Partici- pation Travel	Non-Sports Parti- cipation Travel
Trips	86,300	160,500
Nights	597,500	820,300
Spending (\$ Millions)	29.7	47.9
Average Number of Nights	7	5
Average \$ Per Person-trip	344	299
Average \$ Per Person-night	50	58
Average Travelling Party Size	3	2
Purpose of Trip	Holiday	Visit Friends or Relatives

## Table 3 Non-business Trips of One or More Nights, Residents of Atlantic Canada to New England, 1990-1992

Year	Sports Participation Trips	Annual Change	Non-Sports Participa- tion trips	Annual Change	Total Non- Business Trips	Annual Change
		%		%		%
1990	156,200		440,900		597,100	
1991	215,600	38.0	554,700	25.8	770,300	29.0
1992	213,800	-0.8	419,300	-24.4	633,100	-17.8

#### Travel to Atlantic Canada by New Englanders

In 1992, residents of New England took 86,300 trips to Atlantic Canada which involved some sports activities, representing about a 35% share of all non-business travel (Table 1). Their expenditures totalled \$29.7 million<sup>3</sup>. Between 1990 and 1992, this type of travel increased 14% whereas non-sports participation travel dropped 11%. This, in itself, makes New England sports participation travellers an attractive market.

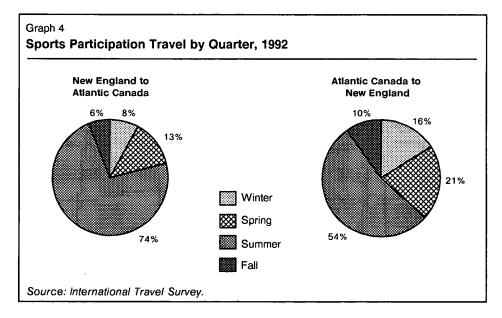
According to 1992 data, the typical sports participation traveller is a male baby boomer on a holiday or vacation. His travelling party consists of three or more persons, often including both adults and children. He visits Atlantic Canada during the summer and stays seven nights. His expenses total about \$50 per person-night.

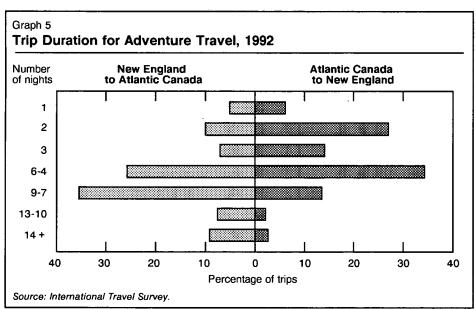
This makes him different from his non-sports participation counterpart (Table 2). Based on 1992 data, the average non-sports participation traveller visits friends and relatives with another adult. He travels during the summer and stays in Atlantic Canada for five nights, on average. He spends about \$58 per personnight, but, because his trip is shorter, he spends less during his trip than a traveller who participates in sports activities.

#### Travel to New England by Residents of Atlantic Canada Residents of Atlantic Canada took 213,800 trips involving sports activities to New England in 1992, totalling about one third of all nonbusiness travel (Table 3). Their expenditures reached an impressive \$50.5 million. Between 1990 and 1992, sports participation

<sup>3</sup> Expenditures are expressed in Canadian dollars and exclude international passenger fares.

	Sports Partici- pation Travel	Non-Sports Participation Trave
Trips	213,800	419,300
Nights	939,100	1,316,400
Spending (\$ Millions)	50.5	88.0
Average Number of Nights	4	3
Average \$ Per Person-trip	236	210
Average \$ Per Person-night	54	67
Average Travelling Party Size	3	2
Purpose of Trip	Holiday	Holiday





travel increased 37%, compared to a 5% drop in non-sports participation travel.

The typical traveller from Atlantic Canada reporting sports activities is a female baby boomer on a holiday or vacation. She travels in a party of three or more which likely includes both adults and children. She visits New England during the summer and stays around four nights. Her expenses total about \$54 per person-night.

According to 1992 data, her non-sports participation counterpart also travels for a holiday or vacation, most likely with one other adult. Her trip takes place in the summer and includes about three nights in New England. She spends approximately \$67 per person-night, but since her trip is shorter, she spends less overall than a sports participation traveller (Table 4).

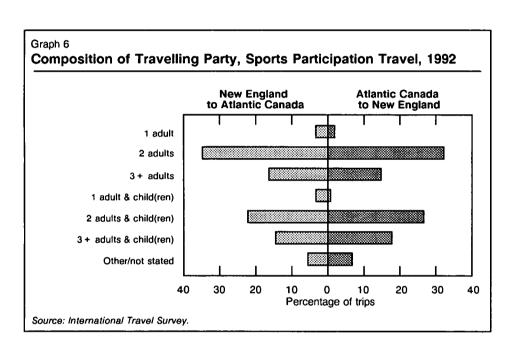
#### Comparing Sports Participation Travellers from the Two Regions

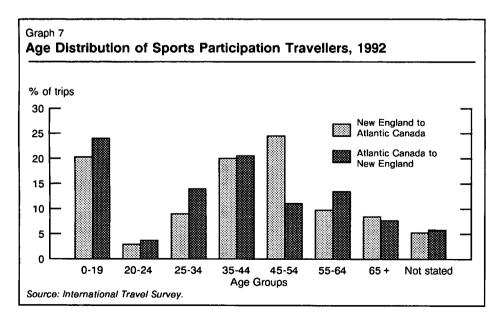
Immediately, one notices similarities and differences when comparing the two groups of travellers. For example, both New Englanders and Canadians from the Atlantic provinces were likely to travel during the summer (Graph 4). However, their propensities to do so were quite different. In 1992, three quarters of New England's travellers visited Atlantic Canada between July and September, with springtime ranking a distant second choice. At the same time, half of the Atlantic Canadians chose summer travel while 1 in 5 travelled between April and June.

Average trip duration, at seven nights in 1992, was notably higher for New England sports participation travellers than for their Atlantic Canadian counterparts, who averaged only four nights. In fact, 61% of the New Englanders

reported trips of 4 to 9 nights' duration with only 22% recording shorter visits. Meanwhile, Atlantic Canadian travellers were evenly divided between trip durations of 1 to 3 nights and 4 to 9 nights at 47% each (Graph 5).

Due to the difference in trip duration, there was a substantial difference in average trip spending. At \$344 per trip in 1992, New Englanders spent nearly 50% more, on average, than their Atlantic Canadian counterparts (\$236). Actually, one third of the travellers in both groups spent at least \$1,000 during their trip. However, where one third of New Englanders spent less than \$500, 44% of Atlantic Canadians fell into this spending range.





**Both New England and Atlantic** Canada travellers tended to travel in groups of three or more (Graph 6). If we consider the age distribution of these travelling parties, we again find similarities. Both sets of travellers were most likely to fall into the same age group - - baby boomers. Beyond this, however, there were significant differences. In 1992, for example, 25% of the sports enthusiasts from New England to Atlantic Canada were between 45 and 54 years of age, whereas only 11% of the travellers in the opposite direction were middle aged (Graph 7).

Perceptions of Service Quality In 1990, Statistics Canada began collecting data from travellers on perceived service quality. All respondents to ITS are now asked the following question: "In comparison with your country, generally how would you rate the following aspects of your trip?"

The five aspects to be rated are:

- transportation services;
- accommodation services;
- hospitality of local people;
- value for your money; and
- variety of things to see/do.

The respondent can rate each of the five items as being better, the same or not as good as in his/her own country.

#### **Transportation Services**

Most sports participation travel in both directions was made by car. In 1992, 68% of the New England sports participation travellers visiting Atlantic Canada rated transportation services there as being better or the same as in the United States (Table 5). On the other hand, 82% of their Atlantic Canada counterparts rated New England's transportation services as being better or the same as in Canada (Table 6). The information

Continued from page 5
collected through ITS has
generally followed this pattern,
with visitors to Canada ranking

the transportation services lower than Canadians rank these services in the countries they visit (Graph 8).

Table 5
Rating of Services by New England Residents Travelling to Atlantic Canada on Sports Participation Trips, 1992

		%		
2	46	15	18	100
1	65	11	13	100
7	28	1	4	100
7	22	38	3	100
6	72	4	8	100
	1 1 67 67 6	1 65 67 28 67 22	1 65 11 67 28 1 67 22 38	1 65 11 13 67 28 1 4 67 22 38 3

Table 6
Rating of Services by Atlantic Canada Residents Travelling to New England on Sports Participation Trips, 1992

	Better in the U.S.	Same	Not as Good as in Canada	Not Stated	Total
			%		
Transportation	43	39	6	13	100
Accommodation	24	63	7	6	100
Hospitality	25	58	14	3	100
Value for Money	72	19	7	2	100
Variety of Things to Do	47	46	3	5	100

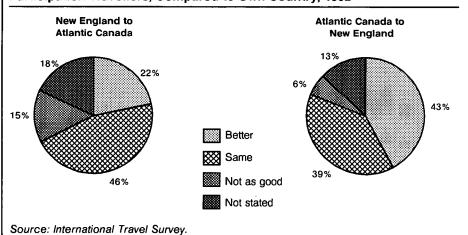
Graph 8

Rating of Transportation Services in Country Visited by Sports

Participation Travellers, Compared to Own Country, 1992

New England to

Atlantic Canada



#### **Accommodation Services**

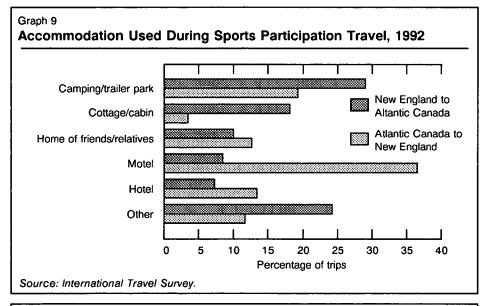
In terms of preferred accommodation type, sports participation travellers between New England and Atlantic Canada differed (Graph 9). In 1992, 29% of travellers from New England camped or stayed in trailer parks while travelling in Atlantic Canada. Although 19% of Atlantic Canadian travellers in New England also chose camping or trailer parks, a larger segment (37%) stayed in motels.

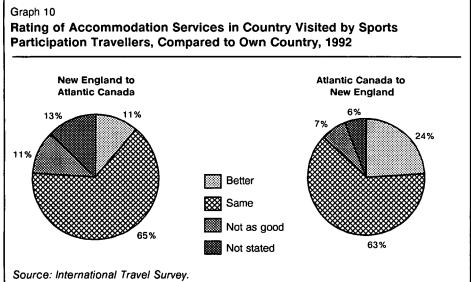
Regarding perceived service quality, 76% of the New Englanders rated accommodation in Atlantic Canada as better or the same as in the United States in 1992 (Graph 10). There was a downtrend from 1990, when 83% of these travellers gave this same ranking. Meanwhile, the accommodation ratings by Atlantic Canadians were fairly stable over time, with 87% rating New England's accommodation services as being better or the same as at home in 1992.

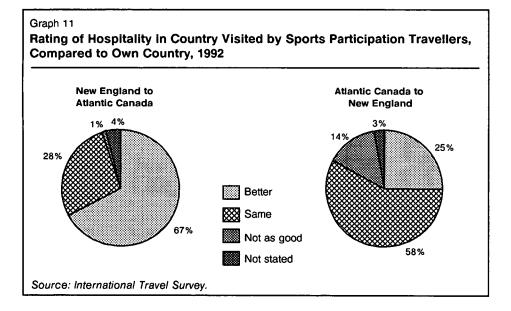
#### **Hospitality Services**

Canada tends to rate highly in terms of hospitality (Graph 11). New England sports participation travellers supported this view in 1992 with 67% reporting that the hospitality was better in Canada than at home and only 1% assigning a negative rating. In all, 95% believed that hospitality was better or the same in Atlantic Canada. These were the best service ratings awarded by New Englanders.

Atlantic Canada residents also rated their neighbours' hospitality services highly, with 83% stating they were better or the same as in Canada. The portion of Atlantic Canadians saying these services were better at 25%, however, was considerably smaller than for residents of New England.







#### Value for Your Money

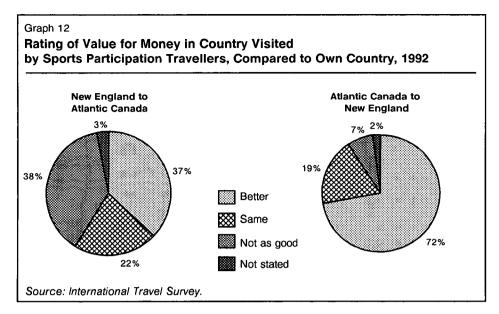
Among the five services rated, considerably more New England sports participation travellers rated value for their money as "not as good" than any of the other aspects they rated. In 1992, 38% felt that value for their money was not as good in Atlantic Canada as at home (Graph 12). This was, however, an improvement from 1991, when 50% assigned this same rating. Atlantic Canadians agreed with this assessment, with 72% reporting that value for their money was better in New England than at home in 1992, more than for any other service rated. This was a decrease from the 78% who gave this rating in 1991.

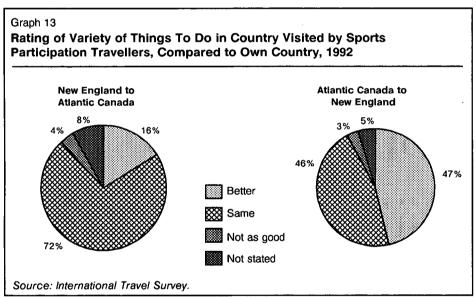
#### Variety of Things to Do

In terms of variety of things to do. the vast majority of New **Englanders and Atlantic** Canadians rated the other's homeland as better or the same as at home (88% and 93% respectively). There was a marked difference, however, in the awarding of a "better" rating. Only 16% of travellers from New England gave Atlantic Canada this highest rating whereas 47% of Atlantic Canadians granted the same to New England (Graph 13). The two flows of travellers had the same propensity to visit more than one province/state and both averaged six activities per trip.

The universal activity among sports participation travellers, by definition, was participating in sports or outdoor activities.

Swimming was the most popular of the activities in this category (Graph 14), with 57% of New Englanders who travelled to Atlantic Canada and 70% of Atlantic Canadians who travelled





to New England reporting swimming as one of their activities in 1992. Among the New Englanders, 24% participated in hunting and fishing compared to only 5% of travellers from Atlantic Canada. A significant number of travellers, about 3 in 10, in both directions reported participation in sports other than water sports, hunting and fishing, and skiing.

Non-sports activities were also important to these travellers (Graph 15). For residents of Atlantic Canada, the most significant non-sports activity in New England was shopping, with more than 9 out of 10 participating in 1992. In contrast, only half of the New Englanders shopped while in Atlantic Canada. In both directions, about 7 in 10 participated in sightseeing.

#### Sizing Up the Market

In studying sports participation travel between Atlantic Canada and New England, one of the most prominent features is the difference in volume. Atlantic Canadians make nearly 2.5 times as many person-trips to New England as vice versa. This, of course, impacts on the money spent.

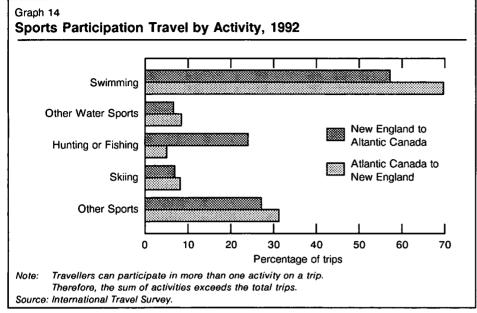
One should keep in mind, however, that residents of New England made 270,400 sports participation trips to Canada in 1992, while 296,700 similar trips to the United States were taken by Atlantic Canadians. The difference is that only one third of the New England sports participation travellers to Canada reported nights spent in Atlantic Canada during 1992. Both Quebec and Ontario received larger shares of these travellers. Meanwhile, 72% of sports participation travellers from Atlantic Canada included at least one night in New England in their trip to the United States.

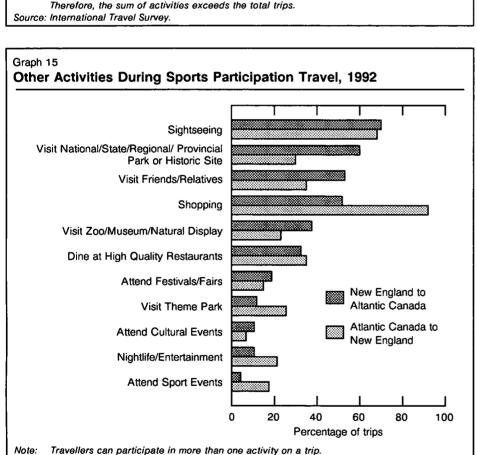
Having taken this into consideration, the imbalance is still evident when one considers the population base in the two regions. In 1992, the population of New England stood at 13.2 million<sup>4</sup>, more than five times the 2.4 million residents of Atlantic Canada<sup>5</sup>.

The growth in sports participation travel between New England and Atlantic Canada from 1990 to 1992 is noteworthy, especially considering the decline in non-sports participation travel during the same period. Part of the decrease in non-sports participation travel was likely due to a shift toward more varied travel activities.

United States Census Bureau, population as of July 1, 1992.

<sup>5</sup> Statistics Canada, population as of July 1, 1992.





Therefore, the sum of activities exceeds the total trips.

Source: International Travel Survey.

#### ▶ Continued from page 8

The data collected through the International Travel Survey can help the travel industries on both sides of the border. By monitoring changing service quality perceptions and responding to them, the travel industry can encourage continued growth in the sports participation travel market.

Ruth McMillan is a Senior Analyst with the Education, Culture and Tourism Division. The article is based on a presentation, given by the author at a joint conference of the Canada and New England Chapters of the Travel and Tourism Research Association (TTRA) in the Fall of 1993.



#### **Travel Between Canada** and Other Countries in 1993

Less Automobile Travel to the **United States by Canadians** Travel of one or more nights to the United States by all modes of travel decreased 6.9% from 1992 to 17.3 million. As a result, the number of Canadian residents returning from trips of one or more nights to the United States was pushed back to the level reached in 1990.

As car trips of one or more nights decreased 10.3% in 1993 to

the lowest level in four years, at 12.2 million, the number of comparable trips by other modes of transport to the United States increased 2.1% to a record 5.2 million. On the other hand, trips by Canadian residents to all other countries in 1993 reached a record 3.3 million, an increase of 5.3% from 1992.

#### **Increased Non-Resident Travel** to Canada

Trips of one or more nights to Canada by residents of the United States increased 1.5% in 1993 to 12.0 million, following two consecutive annual drops. While the U.S. automobile flow to Canada for one or more nights remained flat at 8.3 million in 1993, comparable trips by other modes of transport jumped 5.2% to 3.7 million. Overnight trips by residents of all other countries increased 5.6% to a record 3.1 million. Notable increases were recorded for Germany and France (See Touriscope Indicators on page 12).

	1992	1993 <sup>P</sup>	Change 1992/1993
	(Million	ns of \$)	%
United States			
Receipts	4,550	4,980	9.5
Payments	11,018	10,631	-3.5
Balance	-6,468	-5,651	-12.6
All other countries			
Receipts	3,509	3,723	6
Payments	5,197	5,758	10.8
Balance	-1,688	-2,035	20.6
Total, all countries			
Receipts	8,059	8,703	8.0
Payments	16,215	16,389	1.1
Balance	-8,156	-7,686	-5.8

#### **Improved Travel Account** Deficit in 1993

The preliminary annual estimate of Canada's international travel account in 1993 showed a deficit of \$7.7 billion, a 5.8% improvement from 1992's record \$8.2 billion deficit (Table 7). Total payments and total receipts reached record levels in 1993. However, the strong rise in receipts from visitors to Canada contributed to a narrowing of the international travel account deficit for the first time in seven vears.

Total payments increased 1.1% to \$16.4 billion in 1993. Expenditures by Canadian residents in the United States decreased 3.5% to \$10.6 billion - the first drop recorded in our payments to the United States since 1979. Meanwhile, payments to all other countries increased 10.8% to a record \$5.8 billion.

In 1993, total receipts increased 8.0% to \$8.7 billion. Receipts from the United States increased 9.5% to a record \$5.0 billion. Receipts from all other countries also peaked, rising 6.1% to \$3.7 billion.

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

#### **Travel Prices in 1993**

#### **Travel Price Index Rises Faster** Than the Consumer Price Index in 1993

In 1993, the Travel Price Index (TPI) averaged 134.0 (1986=100), a 2.4% increase over last year (Table 8). The annual increase registered in 1992 (0.8%) had been the lowest recorded since 1980. In comparison, the Consumer Price Index rose 1.8% over 1992 marking a second

► Continued from page 10 straight year of historically low rates of inflation in Canada. Higher prices for imported goods,

fuelled by a weaker Canadian dollar in terms of the U.S. dollar, were offset by lower inflation rates for services.

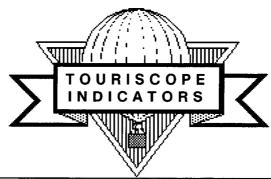
Table 8

Travel Price Index, Not Seasonally Adjusted, 1986 = 100

		Quarters					
	1st	2 <sup>nd</sup>	3rd	41h	Annual Average		
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	106,2	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	129,7	133,2	131,7	130,8		
1993	132,6	132,9	136,0	134,4	134,0		

Source: Education, Culture and Tourism Division.

Among the major elements of the TPI, a marginal increase of 0.8% in traveller accommodation prices in 1993 partially compensated for higher inter-city transportation prices (5.9%). The rise in air fares (6.3%) fuelled the increase in the price of inter-city transport. On the other hand, the cost of operating an automobile increased slightly over the previous year (1.8%), as gasoline prices declined for a third consecutive year. In another sector of the tourism industry, restaurant prices increased by only 1.3% in 1993, marking a second straight year of historically low rates of inflation.



			% C	hange		<del>-</del>	% Change
		Fourth				.,	
		Quarter 1993	Previous Quarter	Previous Year		Year 1993	1992-1993
VISITORS TO CANADA		1000	Godino			1000	
From United States	Т	6,382	-50.2	2.3	Т	32,623	0.6
Overnight visits(p)	Ť	2,032	-62.6	5.4	Ť	11,998	1.5
By auto	Ť	1,358	-65.5	4.9	Ť	8,260	-0.1
From Overseas	Т	592	-62.7	5.9	т	3,478	5.3
Overnight visits(p)	Т	515	-63.7	5.5	Т	3,112	5.6
Top Seven Countries							
United Kingdom	T	93	-64.5	8.1	T	569	5.2
Japan	T	74	-56.7	12.1	Т	409	3.5
France	T	50	-73.3	22.0	Т	362	16.8
Germany	T	45	-74.6	7.1	Т	344	17.0
Hong Kong	T	20	-70.6	0.0	T	118	-2.5
Australia	Ţ	20	-45.9	5.3	T	98	-5.8
Italy	T	15	-69.4	-11.8	T	95	-2.1
CANADIANS OUTSIDE CANADA							
To United States	Т	14,147	-29.9	-10.3	T	66,741	-13.0
Overnight visits(p)	Т	3,209	-48.3	-6.9	T	17,307	-6.9
By auto	T	2,106	-57.3	-9.5	Т	12,154	-10.3
To Overseas	T	647	-25.2	5.7	Т	3,268	5.3
INDUSTRY SECTOR							
Airline passengers (Level I)	Т	5,076	-17.4	3.8	Т	21,947	3.2
Airline passenger-km (Level I)	M	9,670	-29.9	-0.9	М	44,806	-1.3
Inter-city bus passengers	Т	2,938	-8.3	5.6	Т	11,630	-2.7
Restaurant receipts	M	4,854	-8.5	4.2	М	19,456	4.9
PRICES							
1986 = 100 (not s.a.)							
Travel price index		134.5	-1.1	2.1		134.0	2.4
Consumer price index		131.2	0.5	1.8		130.4	1.8
Restaurant meals		137.9	0.2	1.0		137.5	1.3
Inter-city transportation		135.1	-0.1	5.2		133.9	5.9
Gasoline		115.3	-3.3	-5.3		118.4	-1.5
ECONOMIC							
Gross domestic product, 1986 prices (s.a.)	М	524,307	3.4	1.1	М	517,394	2.7
Amusement and recreation	М	4,272	6.3	5.5	M	4,120	1.5
Accommodation and food services	М	11,537	-0.9	1.8	М	11,558	3.3
Personal disposable income per capita (s.a.)		16,871	-1.7	0.2		17,084	1.7
LABOUR FORCE							
Labour force (s.a.)	Т	13,989	0.1	0.8	Т	13,946	1.1
Unemployed	Т	1,552	-2.5	-2.9	Т	1,562	0.4
Employed	Т	12,438	0.3	1.3	Т	12,384	1.2
Accommodation and food services (not s.a.)	T	771	-7.3	4.0	Т	774	1.6
EXCHANGE RATES							
In Canadian Dollars:							
American Dollar		1.3248	1.6	5.0		1.2901	6.7
British Pound		1.9761	0.7	-0.7		1.9381	-9.0
Japanese Yen		0.012248	-0.8	19.4		0.011650	22.0
German Mark		0.7872	1.1	-3.4		0.7808	0.6
French Franc		0.2270	1.2	-5.4		0.2280	-0.4
(AA) AA'II' (T) The second of the seco		<del></del>		***************************************			
(M) Millions. (T) Thousands. (s.a.) seasonally adjusted. (p	o) prelimina	ıry.					

# TRAVEL BETWEEN CANADA AND OTHER COUNTRIES 1992 ANNUAL

# VOYAGES ENTRE LE CANADA ET LES AUTRES PAYS ANNUEL 1992

ubscribers to Statistics Canada's International Travel publications will want this newly released annual report that summarizes annual findings of travel to and from Canada. The publication provides a profile of international travellers by province/country of residence, area of destination, purpose, length of stay, expenditures, age group and sex.

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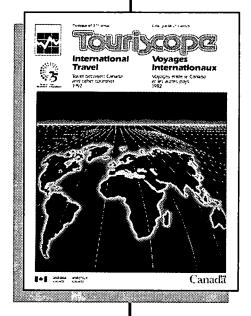
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es abonnés à la publication Voyages internationaux de Statistique Canada voudront se procurer la plus récente version de cette publication annuelle qui résume les données annuelles des voyages entre le Canada et les autre pays. Cette publication offre un profil des voyageurs internationaux par province/pays de résidence, région de destination, but de voyage, durée de séjour, dépenses, groupe d'âge et sexe.

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- 34 tableaux statistiques détaillés
- caractéristiques des voyages et des voyageurs
- notes méthodologiques et détails relatifs à l'enquête.

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- Province de résidence
- Mode de transport
- Durée du séjour
- Dépenses dans les pays visités
- Types d'hébergement
- Âge et sexe des voyageurs
- Raison principale du voyage
- Taille du groupe de voyageurs
- Durée (en nuitées)
- Echelle de dépenses par visite
- Composition du groupe
- Activités pendant le séjour

Les chercheurs dans le domaine utilisent ces renseignements pour se tenir au courant de l'évolution du marché du tourisme et pour déterminer l'incidence du tourisme sur leur champs d'intérêt. Les Profils des voyages internationaux constituent un excellent moyen de segmenter le marché selon les variables géographiques et démographiques et de promouvoir les activités liées aux voyages et au tourisme qui sont de toute évidence très populaires.

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