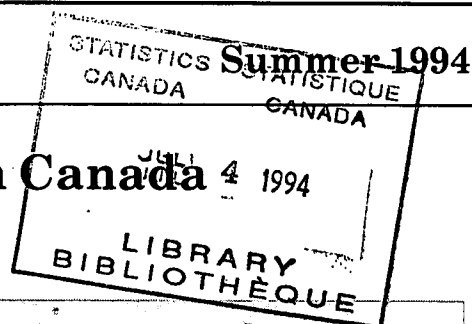




# Travel-log

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## The Main Overseas Tourism Markets in Canada

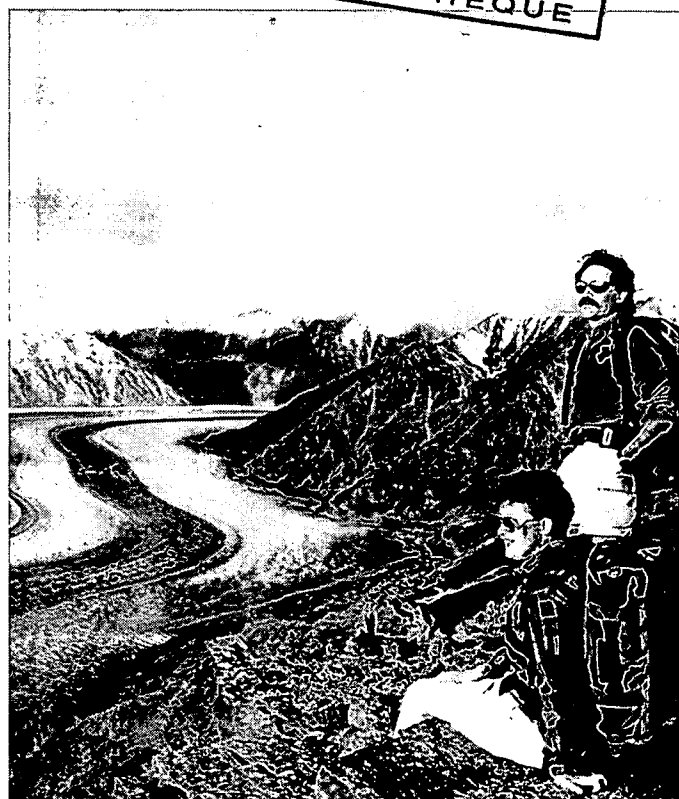
by Monique Beyrouti

In 1992, 2.9 million travellers<sup>1</sup> came to Canada from overseas (countries other than the United States). While in Canada, they spent a total of \$2.6 billion (international transportation costs excluded), representing an average of \$890 per traveller (Table 1). The Japanese<sup>2</sup> represent the most lucrative overseas market in Canada. In 1992, they spent over \$434 million, an average of \$1,107 per traveller. This market represents 17% of the receipts from overseas countries, even though it comprises only 13% of overseas travellers.

The largest share of overseas tourism receipts went to Ontario in 1992, with \$910 million (Table 2). However, British Columbia<sup>3</sup> followed closely behind, with \$720 million. Quebec came third, receiving \$545 million from this market. Alberta received \$314 million from overseas visitors, almost as much as the amount spent in this province in 1992 by American tourists (\$330 million). Finally, all the other provinces received a \$111 million share.

Trips to Canada in 1992 by travellers from overseas involved over 33 million nights<sup>4</sup>. Two out of every five of these were spent in Ontario alone. British Columbia, with 23% of the nights spent in Canada, ranked second, followed closely by Quebec (21%). Alberta's share (10%) far exceeded that of all the Atlantic provinces, Manitoba and Saskatchewan (5%). The British accounted for the most nights spent by overseas travellers in Canada in 1992, with a total of over 6 million.

<sup>1</sup> For trips of one or more nights.  
<sup>2</sup> The Autumn 1993 issue of *Travel-log*, Volume 12, No 4, was specifically dedicated to the Japanese market.  
<sup>3</sup> Includes the Yukon and the Northwest Territories.  
<sup>4</sup> Each night spent by a non-resident in Canada.



### Touriscope

#### In This Issue...

<i>Feature Article</i>		
The Main Overseas Tourism Markets in Canada		1
<i>Trends</i>		
Travel Between Canada and Other Countries		10
Travel Price Index		11
<b>TOURISCOPE INDICATORS</b>		12

Table 1  
**Overseas Travel to Canada, 1992**

Overnight Travel	Person-trips	Person-nights	Spending <sup>1</sup>	Average Duration	Average Spending	
	'000	'000	\$000 000	Nights	Per trip	Per trip
Total Overseas	2,922.1	33,134.1	2,600.6	11.3	890	79
Major Markets:						
United Kingdom	536.4	6,118.7	383.1	11.4	714	63
Japan	392.3	2,495.4	434.4	6.4	1,107	174
France	309.6	3,816.8	294.0	12.3	950	77
Germany	290.3	3,589.4	254.4	12.4	877	71
Hong Kong	119.4	1,206.1	109.7	10.1	919	91
Australia	103.2	1,171.9	84.4	11.4	817	72

<sup>1</sup> Excludes international fares payments.  
Source: International Travel Survey.

Table 2  
**Overseas Travel to Canada by Province Visited, 1992**

Overnight Visits	Province-visits	Nights	Spending
	'000	'000	\$000,000
<b>Canada</b>	<b>3,973.4</b>	<b>33,134.1</b>	<b>2,600.6</b>
Atlantic Provinces	124.1	954.9	70.8
Quebec	824.6	6,959.2	545.4
Ontario	1,530.3	13,494.6	910.2
Manitoba & Saskatchewan	101.4	771.7	40.1
Alberta	451.1	3,329.1	313.9
British Columbia <sup>1</sup>	941.9	7,624.5	720.2

<sup>1</sup> Includes Yukon and the Northwest Territories.  
Source: International Travel Survey.



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

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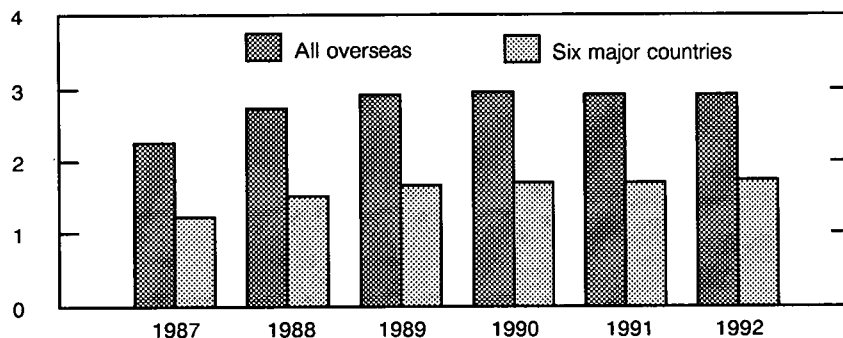
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**Note of Appreciation**

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

Graph 1  
**Overseas Travel to Canada, 1987-1992**

Millions of overnight trips



Source: International Travel Survey.

▶ Continued from page 1

Between 1990 and 1991, the number of visitors from overseas countries dropped by 2%. This reduction might have been much greater had it not been for the rise in the number of travellers from France and Germany: in 1991, 18% more French people and 8% more German people came to Canada than in 1990. In 1992, despite the special events which took place, such as the Olympic Winter Games in France and Expo '92 and the Olympic Summer Games in Spain, the number of travellers who came to Canada

from overseas increased. However, this increase was not sufficient to bring the numbers back to the levels seen in 1990 (Graph 1).

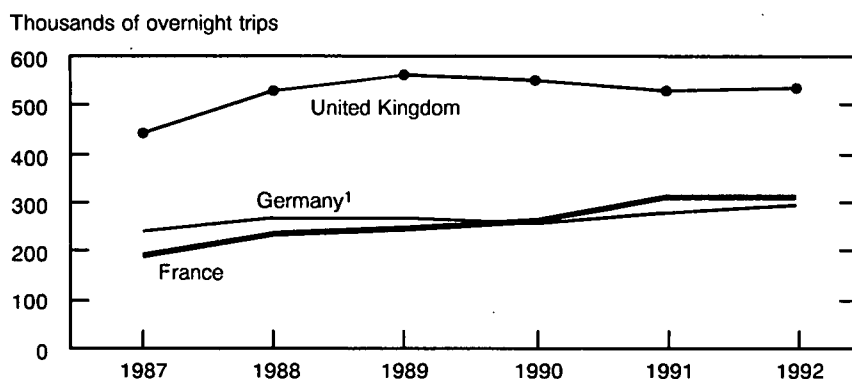
Among the main markets in 1992, only Germany and France exceeded the 1990 levels (Graph 2). However, the United Kingdom still remains Canada's largest overseas market in terms of volume: one traveller in five comes from this part of Europe. The Pacific Basin market is dominated by Japan which comes in second place in terms of overseas trips to Canada but first for spending. Japan is still Canada's

most lucrative overseas market despite two consecutive annual declines in arrivals since the record level of 1990 (Graph 3).

According to the most recent estimates from the International Travel Survey, the number of overseas travellers to Canada in 1993 increased from 1992, even exceeding, for the first time, the three million mark. Once again, Germany and France showed a much higher than average increase.

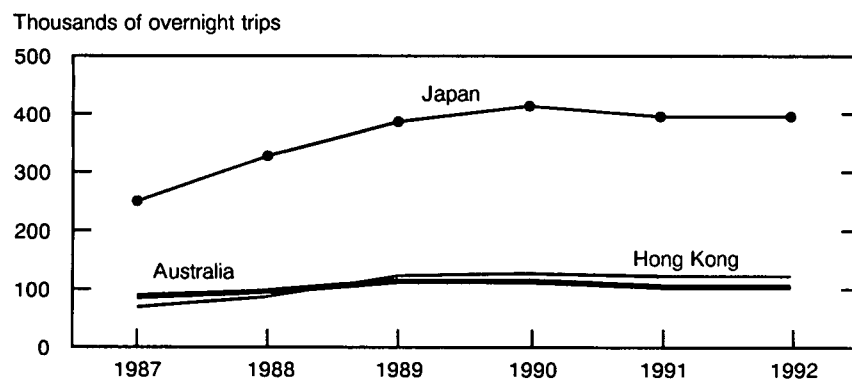
The present analysis examines certain characteristics related to travellers from the United Kingdom, Japan, France, Germany, Hong Kong and Australia. Aside from the United States, these countries represent the largest group of travellers to Canada. In addition, their market representation increased from 56% in 1987 to 60% in 1992.

Graph 2  
Travel from European Primary Markets to Canada, 1987 to 1992



<sup>1</sup> Since 1991, refers to re-united Germany.  
Source: International Travel Survey.

Graph 3  
Travel from Pacific Basin Primary Markets to Canada, 1987 to 1992



Source: International Travel Survey.

### Ontario's position not quite as dominant

Foreigners continue to enjoy Canada as a tourist destination, as the figures show. The rate of growth in travel from the six countries considered in this study was higher than for overseas countries as a whole. In five years, travellers from the six countries of origin increased in number by 40%. The increase for all overseas countries during this period was 30%. However, it should be noted that the world recession had an effect on international travel.

Various factors influence the choice of itinerary of foreign tourists during their stay in Canada. The reason for the trip, geographic proximity, cultural ties and tourist attractions are some of the determining factors. Overseas travellers usually visit more than one province during their stay in Canada, and the choice varies. Tourists from the United Kingdom mainly visit Ontario, while Quebec is the favourite province of visitors from France. A third of the province-visits made by Germans are to Ontario. British Columbia's primary market is the Pacific Basin.

► Continued from page 3

Ontario's share of visits<sup>5</sup> dropped considerably between 1987 and 1992, with respect to the six main countries of visitor origin. For travellers from the United Kingdom, Japan and Germany, Ontario was the main province visited in 1987.

However, five years later, the picture was different. There was a sizeable reduction in Ontario's share of visitors from these three countries, and an increase for Alberta and British Columbia. Whereas 60% of Japanese visitors went to Ontario and 34% went to British Columbia in 1987, in 1992 these figures were 30% for Ontario

and 41% for British Columbia (Table 3).

Conversely, travellers from Hong Kong, who were interested mainly in British Columbia and Ontario in 1987, visited Alberta and Quebec to a larger degree in 1992. Visits by Australian residents were divided between British Columbia and Ontario in 1987. In 1992, they also showed an interest in Alberta. France contrasted with other countries in terms of the stability of the choice made by French visitors, who continued to choose Quebec as their destination about 60% of the time throughout this period.

Visitors from the six countries studied accounted for 60% of Canada's travel receipts from overseas countries in 1992, compared with 55% in 1987. The Japanese provided 17% of the tourism receipts from overseas markets in 1992, compared with 15% for United Kingdom residents. France accounted for 11% of the total, followed by Germany, with 10%.

In 1991, British Columbia received the largest share of travel receipts from the six main overseas markets (\$478 million). Ontario followed, with \$444 million. In 1992, however, the situation changed in favour of Ontario, where there was an increase in receipts from these six countries, while only the German market increased in British Columbia compared with 1991. Quebec obtained a higher share in 1992, taking in a fifth of the travel receipts from these six countries, while Alberta, with 14%, came fourth.

The statistics from the International Travel Survey generally show proportional equivalence between the number of nights spent in a province and the amount of spending done there (Tables 4 and 5). However, some exceptions may be noted. In proportion to nights spent, tourists spend less in Ontario and more in

Table 3  
Provincial Share of Visits, Major Overseas Countries, 1992

Province Visited	United Kingdom	Japan	Germany	France	Hong Kong	Australia
	%					
<b>Total Canada</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
Atlantic Provinces	4	2	4	3	--	4
Quebec	12	8	15	59	10	11
Ontario	46	30	35	28	37	26
Manitoba & Saskatchewan	3	2	3	1	3	5
Alberta	13	17	15	4	11	18
British Columbia <sup>1</sup>	22	41	28	5	39	36

<sup>1</sup> Includes Yukon and the Northwest Territories.

-- Too small to be expressed.

Source: International Travel Survey.

Table 4  
Provincial Share of Night Stays, Major Overseas Countries, 1992

Province Visited	United Kingdom	Japan	Germany	France	Hong Kong	Australia
	%					
<b>Total Canada</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
Atlantic Provinces	4	3	3	2	--	3
Quebec	7	5	10	71	6	8
Ontario	51	29	39	17	39	26
Manitoba & Saskatchewan	3	2	3	--	2	3
Alberta	13	16	13	4	9	17
British Columbia <sup>1</sup>	22	45	32	6	44	43

<sup>1</sup> Includes Yukon and the Northwest Territories.

-- Too small to be expressed.

Source: International Travel Survey.

Table 5  
Provincial Share of Travel Spending, Major Overseas Countries, 1992

Province Visited	United Kingdom	Japan	Germany	France	Hong Kong	Australia
	%					
<b>Total Canada</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
Atlantic Provinces	4	3	4	1	--	3
Quebec	8	5	12	70	8	10
Ontario	44	26	33	18	41	27
Manitoba & Saskatchewan	2	2	1	--	2	2
Alberta	15	21	14	4	7	18
British Columbia <sup>1</sup>	27	43	36	7	42	40

<sup>1</sup> Includes Yukon and Northwest Territories.

-- Too small to be expressed.

Source: International Travel Survey.

<sup>5</sup> Refers to stays of one or more nights in a province during a trip to Canada.

► Continued from page 4

Alberta and British Columbia. For example, in 1992, travellers from the United Kingdom spent half their nights in Ontario, but only 44% of their total spending in Canada took place in that province. British Columbia, on the other hand, received 27% of the spending by visitors from the United Kingdom in Canada, while only 22% of their nights were spent in that province.

**The United States as a gateway**

Many overseas travellers who come to Canada first go to the United States (Graph 4). This situation can be explained by the availability of direct airline service between Canada and overseas countries. Over half the visitors from Hong Kong come to Canada via the United States. More than 80% of Australian visitors do the same, representing the greatest proportion of indirect trips for all the six countries. Japan is situated between the two preceding markets: three Japanese travellers in five come to Canada through the United States. Considering the six countries that make up the primary market, the French are the most likely to fly to Canada directly. Only one French traveller in five enters Canada via the United States.

**The British lead in most provinces**

The United Kingdom still accounts for the greatest number of overseas travellers to Canada. This market is heavily focused on visits to relatives and friends compared to the other five countries (Table 6). Also, a third of British residents stay in Canada for more than two weeks.

Table 6  
**Profile of Trips from the United Kingdom, 1992**

	Number	Share %
Person-trips	536,400	100
by Purpose:		
Business	53,400	10
Pleasure	232,300	43
Visit Friends and Relatives	231,400	43
Other	19,300	4
by Duration:		
1 night	28,000	5
2-3 nights	83,100	15
4-6 nights	84,900	16
7-13 nights	154,500	29
14 nights +	185,900	35
by Quarter:		
First	52,100	10
Second	150,500	28
Third	248,700	46
Fourth	85,200	16

Source: International Travel Survey.

Ontario remains the favourite province of visitors from the United Kingdom: in 1992, the 536,000 travellers from this country made 324,000 visits to Ontario. British Columbia comes next, while Alberta and then Quebec follow in terms of popularity with the British. However, the British are not the most numerous visitors in all the provinces: Quebec receives more French, while British Columbia receives more Japanese.

**Canada attracting more and more French people**

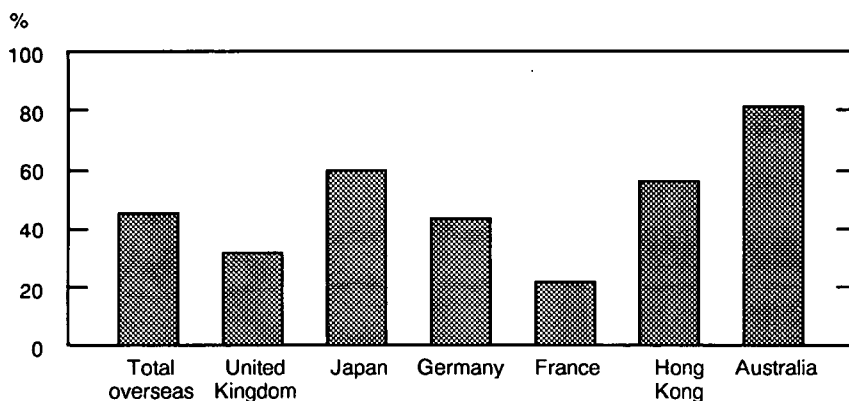
Of the three European countries, France showed the greatest growth between 1987 and 1992. French people come to Canada mainly for pleasure trips and they are the most inclined to visit our country during summer (Table 7).

Table 7  
**Profile of Trips from France, 1992**

	Number	Share %
Person-trips	309,600	100
by Purpose:		
Business	44,800	14
Pleasure	178,700	58
Visit Friends and Relatives	76,700	25
Other	9,500	3
by Duration:		
1 night	12,100	4
2-3 nights	32,100	10
4-6 nights	43,600	14
7-13 nights	111,100	36
14 nights +	110,700	36
by Quarter:		
First	26,500	9
Second	80,800	26
Third	161,700	52
Fourth	40,700	13

Source: International Travel Survey.

Graph 4  
**Share of Overseas Travel to Canada via the United States, 1992**



Source: International Travel Survey.

Quebec remains, by far, the province most often visited by French tourists in Canada. Since 1987, its share of province-visits in Canada has remained around 60%. In 1992, the 310,000 French

▶ Continued from page 5

travellers to Canada made 259,000 visits to Quebec. For the same period, Quebec's nearest competitor, Ontario, received only 121,000 visits from residents of France. Quebec's receipts from the French market are the highest among the six countries studied.

**The new Germany: an evolving market**

Tourists from Germany constitute an enormous market. In 1992, the OECD estimated spending by German travellers abroad to be US\$37 billion<sup>6</sup>. This places them second behind United States travellers in terms of international travel spending. A number of factors have contributed to this situation: the growth in the German economy, the strength of the mark and the fact that Germans enjoy six weeks of vacation. Of the six main overseas countries, Germany showed the greatest proportion of stays lasting two weeks or more in Canada (Table 8).

The provincial distribution of visits by Germans changed in the five-year period under consideration. Ontario remained in the lead, with 145,000 visits by

**Table 8  
Profile of Trips from Germany, 1992**

	Number	Share %
Person-trips	290,300	100
by Purpose:		
Business	33,300	11
Pleasure	169,500	58
Visit Friends and Relatives	78,400	27
Other	9,100	3
by Duration:		
1 night	28,400	10
2-3 nights	45,400	16
4-6 nights	40,200	14
7-13 nights	64,700	22
14 nights +	111,700	38
by Quarter:		
First	25,300	9
Second	77,800	27
Third	145,900	50
Fourth	41,000	14

Source: International Travel Survey.

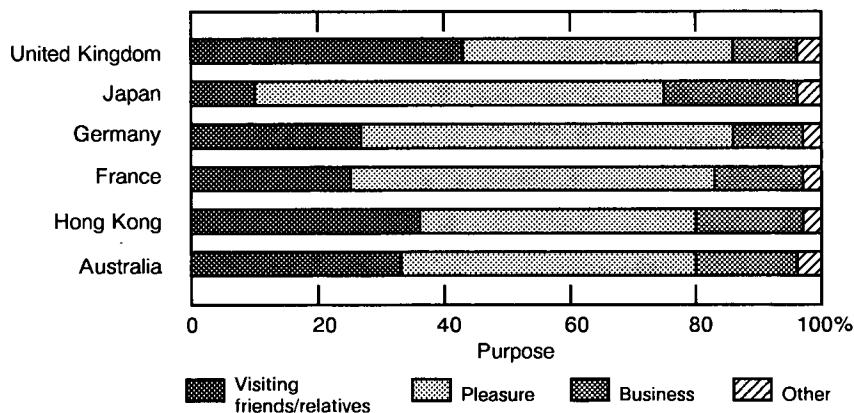
the 290,000 German travellers to Canada in 1992. However, this number was down from 1987<sup>7</sup>. British Columbia continued to remain behind Ontario in German preference, even though its market share increased over that of 1987. Furthermore, contrary to the situation in 1987, Alberta beat Quebec in this market in 1992.

**The leaders in pleasure travel**  
Japan constitutes the third largest market in the world in terms of spending on travel abroad, behind the United States and Germany. This market represented US\$27 billion worldwide in 1992 according to the OECD. Japanese travellers to Canada provided 28% of the travel receipts from the six main overseas countries in 1992, while they made up only 22% of travellers from the six countries under study.

Furthermore, they are the ones most oriented toward pleasure trips. Nearly seven Japanese travellers out of ten come to Canada mainly for this reason (Graph 5). Business travel by Japanese residents is also the largest among the six main overseas countries. In relation to the group of countries, this market witnessed the highest proportion of one-night stays in Canada (Table 9).

<sup>6</sup> Organization for Economic Co-operation and Development, *Tourism Policy and International Tourism*, Paris, 1994.  
<sup>7</sup> Starting with 1991, figures refer to the re-united Germany.

**Graph 5  
Distribution of Major Overseas Countries by Purpose of Trip, 1992**



Source: International Travel Survey.

**Table 9  
Profile of Trips from Japan, 1992**

	Number	Share %
Person-trips	392,300	100
by Purpose:		
Business	82,400	21
Pleasure	253,500	65
Visit Friends and Relatives	38,900	10
Other	17,500	4
by Duration:		
1 night	63,400	16
2-3 nights	99,400	25
4-6 nights	107,300	27
7-13 nights	88,100	22
14 nights +	33,900	9
by Quarter:		
First	63,500	16
Second	97,600	25
Third	165,400	42
Fourth	65,800	17

Source: International Travel Survey.

► Continued from page 6

**A market oriented toward relatives and friends**

The Hong Kong market ranks second, after the United Kingdom, with respect to the proportion of trips made to visit relatives or friends. Among the six main overseas markets, it shows the highest proportion of visits in the first three months of the year (Table 10).

Table 10  
**Profile of Trips from Hong Kong, 1992**

	Number	Share %
Person-trips	119,400	100
by Purpose:		
Business	20,000	17
Pleasure	52,100	44
Visit Friends and Relatives	43,100	36
Other	4,300	4
by Duration:		
1 night	6,200	5
2-3 nights	22,700	19
4-6 nights	20,300	17
7-13 nights	44,900	38
14 nights +	25,300	21
by Quarter:		
First	22,700	19
Second	27,100	23
Third	50,100	42
Fourth	19,500	16

Source: International Travel Survey.

Residents of Hong Kong travelling to Canada visit British Columbia and Ontario almost exclusively. More than four nights out of five are spent in these two provinces. Travel spending in Canada by Hong Kong residents amounted to approximately \$110 million in 1992, with \$45 million going to Ontario, and \$46 million going to British Columbia.

**Vacations taken by Australians in Canada**

After declining in 1991, the Australian market picked up again in 1992. One Australian out of every two comes to Canada for a pleasure trip, while one in three comes to visit relatives or friends (Table 11). Despite the fact that 80% of them come in through the United States, Australian residents stay in Canada an average of 11 nights.

Australians spent \$84 million in Canada in 1992. This spending was mainly in British Columbia (\$34 million) and Ontario (\$23 million).

**From the youngest to the oldest**  
Travellers from the United Kingdom make up a distinct demographic group. They are considerably older than travellers from the five other countries

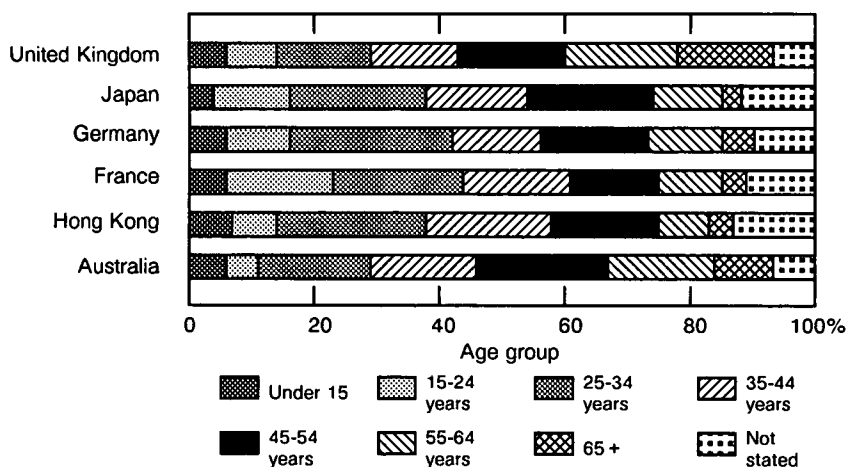
Table 11  
**Profile of Trips from Australia, 1992**

	Number	Share %
Person-trips	103,200	100
by Purpose:		
Business	17,000	16
Pleasure	48,500	47
Visit Friends and Relatives	33,600	33
Other	4,200	4
by Duration:		
1 night	5,800	6
2-3 nights	18,800	18
4-6 nights	19,800	19
7-13 nights	32,400	31
14 nights +	26,400	26
by Quarter:		
First	13,600	13
Second	31,100	30
Third	39,100	38
Fourth	19,500	19

Source: International Travel Survey.

considered (Graph 6). One British traveller in six is 65 or older. The French market is proportionally the youngest in the group of six. In 1992, one French traveller out of five was between 15 and 24 years old. The German market had proportionally more young adults between 25 and 34 years old. In 1992, one German out of four was in this age group.

Graph 6  
**Distribution of Age Groups, by Major Overseas Countries, 1992**



Source: International Travel Survey.

**Alone or in a group**

Half of all British travellers travel in pairs. The same is true for Australians. In this way, these two countries are distinguished from other markets (Graph 7). Australians also travel alone: one in four travels this way, the highest proportion of all six countries. In contrast to Australians, Japanese people come to Canada mainly in groups of three or more adults. In the Hong Kong market, one trip in five is taken with children - the highest proportion within the group studied. Adult Australian groups, on the other hand, travelled the least with children in 1992.

▶ Continued from page 7

**Tents or hotel rooms**

As residents of the United Kingdom come to Canada both for a vacation and to visit their relatives and friends, the type of accommodation used reflects the preponderance of nights spent with friends or relatives. This is especially the case when they visit the Atlantic provinces or Ontario. However, in Quebec, 40% of their visits include accommodation only at a hotel. Camping is not their

cup of tea: only 5% of visits British people make in Alberta include accommodation in a tent or trailer, even though camping is popular in that province.

The French are not avid campers either. The one type of accommodation they use most often in Canada is hotels. As for Germans, the type of lodging they use varies depending on the province visited. In Quebec, they most often use hotels, while in Ontario, 3 travellers out of 10 stay with friends or relatives. Camping

is particularly popular with Germans in Alberta, where they camp on 28% of the visits they make in that province.

The Japanese use hotels most during their trips to Canada (Graph 8). They, thus, represent the most lucrative overseas market for the Canadian hotel industry. Because the Hong Kong market includes a large number of travellers who visit relatives or friends, two visits out of five in Canada are outside the commercial accommodation circuit. The Australian market resembles that of France: these travellers are not big camping fans, and the type of accommodation they most often use in Canada is hotels.

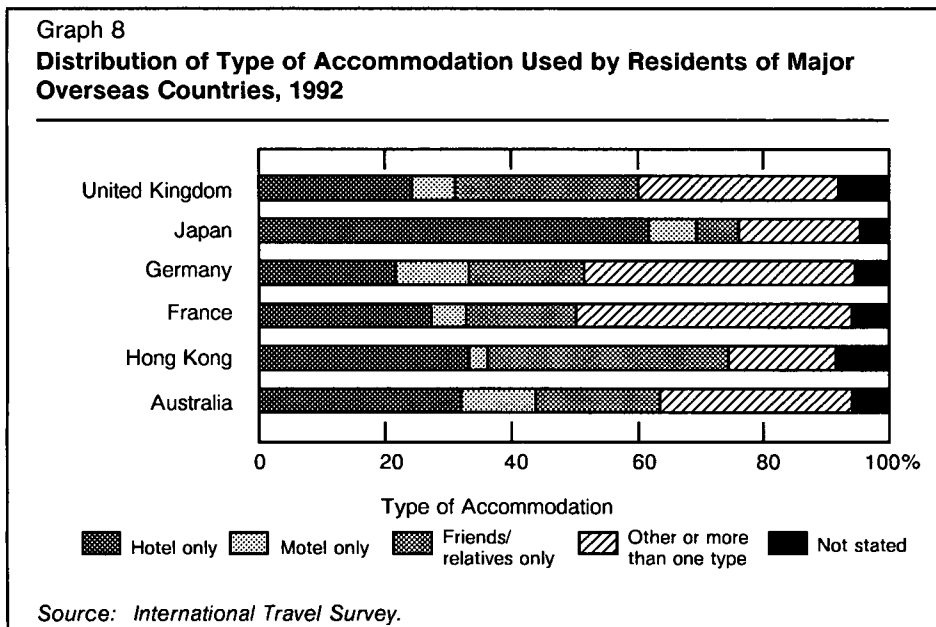
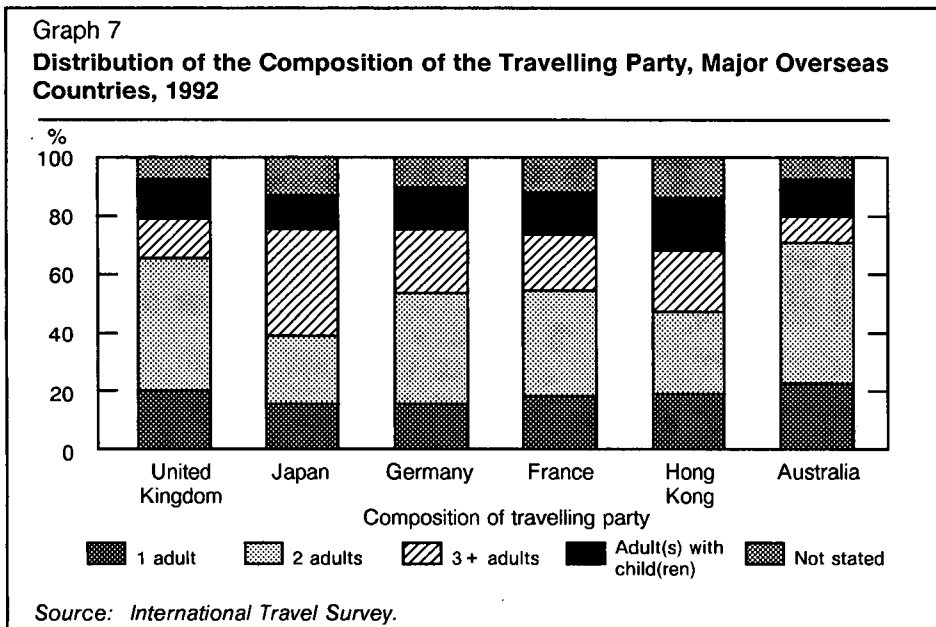
**A varied choice of activities**

Nine British people out of ten go shopping when visiting Canada. This is the highest proportion of the six countries studied. The British are also different in that they participate the most in sports and outdoor activities among the six countries (Graph 9).

The French market attaches a great deal of importance to good food. Over half of all French visitors dine in gourmet restaurants while staying in Canada. However, French travellers participate less than their European counterparts in sports and outdoor activities when in Canada. Of the three European markets, German travellers are the most inclined to visit parks and historic sites.

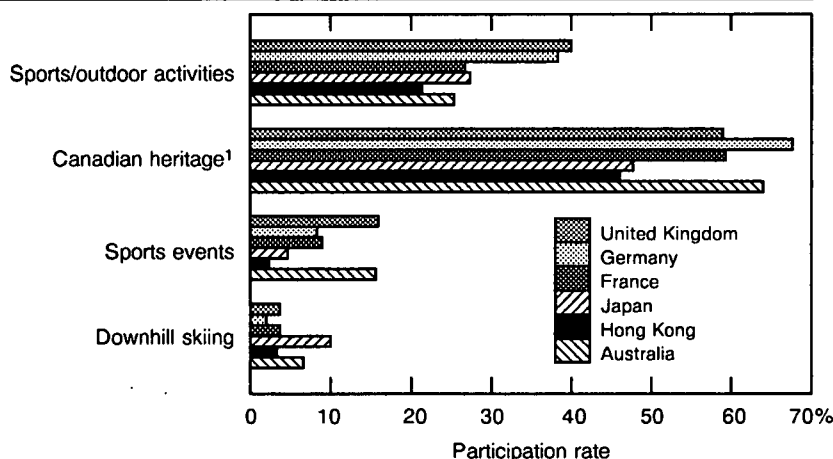
The Japanese are the ones who most like to go downhill skiing in Canada: one out of 10 Japanese travellers participated in this sport in 1992. Hong Kong residents visiting Canada love to go sightseeing. However, they participate less in sports and outdoor activities than residents of other countries.

As for Australian residents, 87% of them go sightseeing, 84% go shopping and 64% visit parks





**Graph 9**  
**Participation Rate in Selected Activities While Travelling in Canada, Major Overseas Countries, 1992**



<sup>1</sup> National, Provincial, Regional Parks and Historic Sites.

Note: Travellers can participate in more than one activity on a trip. Therefore, the sum of activities exceeds the total trips.

Source: International Travel Survey.

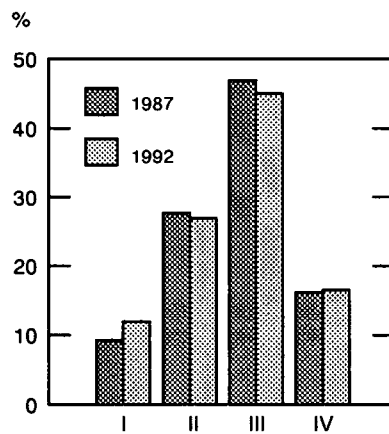
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and historic sites when in Canada. Australians' participation in sightseeing is one of the highest for the six countries studied, along with the United Kingdom. Australians are also among the most interested in Canadian sports events: one Australian out of every six attends a sports event in Canada. English travellers show the same level of interest in this type of event.

**The summer: just as popular as ever**

Tourists travel to Canada at all times of the year, depending on their origin, the purpose of their visit and many other factors. Between 1987 and 1992, however, the proportion of overseas travellers who came during the summer, though still preponderant, declined somewhat, from 47% to 45% (Graph 10). In 1992, nearly half the travellers from the United Kingdom visited Canada during the summer season. The French were more inclined to visit Canada in the summer than residents of any of the five other

**Graph 10**  
**Distribution of Overseas Travel to Canada by Quarter**



Source: International Travel Survey.

countries in 1992 (52%). Following closely behind were the Germans, half of whose trips to Canada were made during the summer.

The quarterly statistics show that, in 1992, the summer was the preferred time to visit for 42% of travellers from Japan and Hong

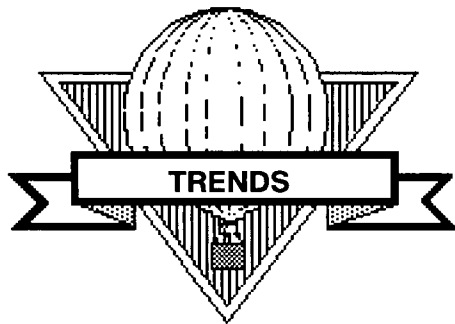
Kong. As the summer and winter seasons in Canada and Australia are reversed, our summer corresponds to their winter. Furthermore, the school vacation period in Australia is in December and January, the opposite of Canada. This explains why only 38% of Australians came to Canada during the summer in 1992.

**Evolution of overseas markets in Canada**

The role of the six primary overseas markets in each province is decisive. Travel spending figures for the six main countries confirm the size of the economic impact. They represent at least half of the overseas tourism receipts in each province, with proportions ranging from 53% in Ontario to 70% in Alberta.

Ontario continues to be the main centre of tourist attraction in Canada for all overseas countries. However, this province's market share in terms of tourist spending decreased from 44% in 1987 to 35% in 1992 while holding on to its first position. The share of overseas tourism receipts held by certain regions did not increase between 1987 and 1992; this was the case for the Atlantic Provinces (3%), Manitoba and Saskatchewan (2%). However, the shares of Quebec and Alberta increased by two percentage points each during this period, from 19% to 21% in the case of Quebec, and from 10% to 12% in the case of Alberta. British Columbia had the best growth in this regard. Its share of the overseas market, in terms of tourism receipts, increased from 22% in 1987 to 28% of the market in 1992.

Those involved in the Canadian tourism industry recognize the importance of clearly identifying the high-performance segments of the clientele in order to optimize income. The International Travel Survey provides them with an essential tool for collecting information on these markets.



## Travel Between Canada and Other Countries in the First Quarter of 1994

### Record Number of Non-Resident Travellers to Canada this Winter

The volume of non-resident travel into Canada rose in the first quarter of 1994, reaching an unprecedented level for the period. Trips of one or more nights to Canada by U.S. residents increased 4% while those by residents of other countries were up 9% from the winter of 1993 (See Touriscope Indicators on page 12).

Our major European market, the United Kingdom, witnessed a 7% increase which brought the level of travel higher than the previous first quarter record of 1991. Among other major European markets, the flow of travel from Germany increased 17% during the winter of 1994 from the same period in 1993. At the top of the Asia-Pacific market, Japan experienced a 10% increase and reached a new record level in the first quarter of 1994. In terms of the overseas winter travel market to Canada, Japan has ranked first since the winter of 1990.

### Less Foreign Travel by Canadians

Foreign overnight travel by Canadian residents dropped 8% from the first quarter of 1993. A decrease of 11% in the number of trips to the United States during this period was responsible for the decline in foreign travel by Canadians. As a result, the Canadian travel market to the

United States in the first three months of 1994 was reduced to the lowest level registered since the winter of 1989.

Overseas destinations fared better as the number of Canadian residents returning from countries other than the United States increased 5% over 1993. In fact, a record number of Canadian residents returned from overseas trips in the first quarter of 1994.

### Monthly Trends

Seasonally adjusted data, which highlight monthly trends, show that non-resident overnight travel to Canada increased 3% in March over February 1994 (Graph 11). This type of travel has been inching upward since April 1993. A key factor in this uptrend has been the weakening Canadian dollar (See Exchange rates on page 12). On the other hand, Canadians made more overnight trips abroad in March compared to the previous month, despite the weakening Canadian dollar.

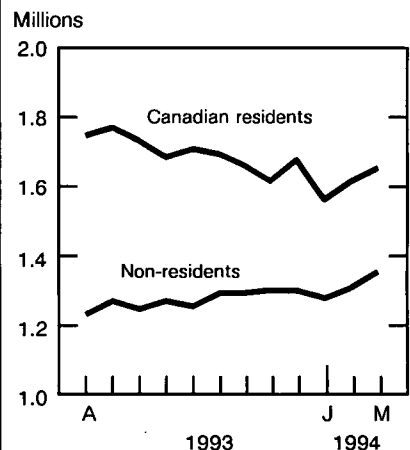
Table 12  
International Travel Receipts and Payments, First Quarter

	First quarter 1993 <sup>r</sup>	Second quarter 1993	Third quarter 1993	Fourth quarter 1993 <sup>r</sup>	Total 1993 <sup>r</sup>	First quarter 1994 <sup>p</sup>
\$ millions						
Unadjusted						
United States						
Receipts	585	1,268	2,351	875	5,079	699
Payments	2,889	3,003	2,757	2,182	10,831	2,672
Balance	-2,304	-1,735	-406	-1,307	-5,752	-1,973
All other countries						
Receipts	445	997	1,734	549	3,725	538
Payments	1,531	1,330	1,703	1,286	5,850	1,647
Balance	-1,086	-333	31	-737	-2,125	-1,109
Total, all countries						
Receipts	1,030	2,265	4,085	1,424	8,804	1,237
Payments	4,420	4,333	4,460	3,468	16,681	4,319
Balance	-3,390	-2,068	-375	-2,044	-7,877	-3,082

<sup>p</sup> Preliminary figures.

<sup>r</sup> Revised figures.

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



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

► Continued from page 10

### Lower Deficit on the Travel Account

During the first quarter of 1994, the unadjusted travel account deficit reached \$3.1 billion, its lowest level in three winters. The improvement in the travel deficit resulted from lower Canadian travel to the United States and higher foreign travel to Canada.

During the first quarter of 1994, Canadians spent \$2.7 billion travelling in the United States, an 8 % decrease from the first quarter of 1993 (Table 12). However, increased travel to countries other than the United States resulted in spending of \$1.6 billion, 8 % higher than during the first quarter of 1993 and a record level for this period of the year.

Spending in Canada by a larger number of foreign travellers reached a record first quarter level of \$1.2 billion. Receipts from the

United States increased 19% to \$0.7 billion while those from all other countries increased 21% from the first quarter of 1993 to \$0.5 billion.

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

### Travel Price Index, First Quarter 1994

The Travel Price Index (TPI) is an aggregate index of products and services used when travelling in Canada. To take into account changing buying habits of travellers who tend to adjust their purchases to changes in price, the weighting is replaced periodically. This regular updating corresponds to the two-year cycle of the Canadian Travel Survey (CTS). As a result, the 1990 basket was replaced by that of 1992 with the

TPI release for the first quarter of 1994. Thus, the 1992 basket took effect with the fourth quarter 1993 over the first quarter of 1994 price change. Of course, the new series are linked to the preceding series for continuity.

During the first quarter of 1994, the Travel Price Index (TPI) decreased 0.7% over the fourth quarter of 1993. This was the second quarterly drop of the index, the TPI having been reduced by 1.1% in the previous quarter (Table 13). In comparison, the 0.5% decrease in overall prices for goods and services, as measured by the Consumer Price Index (CPI) in the first quarter of 1994, was the first since the end of 1991.

The decline of the TPI in the first quarter of 1994 in comparison to the fourth quarter of 1993 reflected price decreases in traveller accommodation and private automobile operation during the period. However, increases were noted in the TPI public transportation components (inter-city, local and commuter transportation).

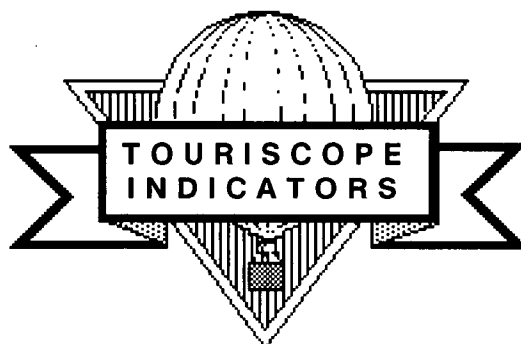
From the first quarter of 1993, the most significant upward pressure came from the inter-city transportation index which turned up 2.7%. The year-over-year rate of change for the TPI was the same as for the CPI, 0.6% in the first quarter of 1994.

A technical report on the Travel Price Index is available from the Travel, Tourism and Recreation Section at 613-951-9169.

Table 13  
Travel Price Index, Not Seasonally Adjusted, 1986 = 100

	Quarters				Annual Average
	1st	2nd	3rd	4th	
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
1994	133.4				

Source: Education, Culture and Tourism Division.



		First Quarter 1994	% Change	
			Previous Quarter	Previous Year
<b>VISITORS TO CANADA</b>				
From United States	T	5,053	-20.8	0.8
Overnight visits(p)	T	1,451	-28.6	4.4
By auto	T	947	-30.3	5.1
From Overseas	T	421	-28.8	7.3
Overnight visits(p)	T	382	-25.8	8.8
Top Seven Countries				
Japan	T	69	-6.8	10.0
United Kingdom	T	58	-37.4	6.9
Germany	T	37	-17.8	16.6
France	T	35	-30.4	13.8
Hong Kong	T	22	9.2	5.9
Australia	T	15	-23.4	18.6
Mexico	T	10	-14.6	31.4
<b>CANADIENS OUTSIDE CANADA</b>				
To United States	T	12,304	-13.0	-16.1
Overnight visits(p)	T	3,292	2.6	-11.2
By auto	T	1,880	-10.7	-14.8
To Overseas	T	1,080	66.9	4.9
<b>INDUSTRY SECTOR</b>				
Airline Passengers (Level I)	T	4,430	-12.7	-14.5
Airline passenger-km (Level I)	M	9,955	2.9	-1.5
Inter-city bus passengers	T	2,833	-3.6	-1.9
Restaurant receipts	M	4,429	-8.5	4.2
<b>PRICES</b>				
1986 = 100 (not s.a.)				
Travel Price Index		133.4	-0.7	0.6
Consumer Price Index		130.6	-0.5	0.6
Restaurant meals		138.6	0.5	1.2
Inter-city transportation		137.2	1.6	2.7
Gasoline		110.8	-3.9	-7.4
<b>ECONOMIC</b>				
Gross Domestic Product, 1986 prices (s.a.)	M	528,725	0.8	3.4
Amusement and recreation	M	4,263	-0.2	4.4
Accommodation and food services	M	11,658	1.0	1.4
Personal disposable income per capita (s.a.)		17,077	1.6	0.7
<b>LABOUR FORCE</b>				
Labour force (s.a.)	T	14,023	0.2	1.1
Unemployed	T	1,544	-0.5	0.8
Employed	T	12,479	0.3	1.2
Accommodation and food services (not s.a.)	T	754	-2.2	5.6
<b>EXCHANGE RATES</b>				
In Canadian dollars:				
American Dollar		1.3413	1.2	6.3
British Pound		1.9961	1.0	7.0
Japanese Yen		0.0125	2.5	20.2
German Mark		0.7788	-1.1	0.9
French Franc		0.2290	0.9	0.6

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