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Touriscope

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1987 - Banner Year for the Restaurant Industry

BY JOCELYN LAPIERRE

Not too long ago, eating in restaurants was saved for special occasions. Not anymore! New demographic trends such as late-parenting, dual-careers and single parent families, together with an increasing appetite for travel and the good life, are influencing demand for more time and labour saving services, including prepared meals.

Restaurants, caterers and taverns grossed more than $14 billion in sales in 1987, achieving an outstanding 5% real growth over 1986 (Table 1). This has been the best year for the industry during the period 1982 to 1987.

Food to Go - An Emerging Trend

After experiencing a moderate 6% gain in sales between 1982 and 1986, take-out businesses reported an impressive 13% increase over 1986, recording the highest sales growth of the industry in 1987. Caterers came a close second with sales increasing 11%, following a 3% loss in sales during the 1982-1986 period. Unlicensed restaurant sales were also at par with the overall industry average.

However, all things not being equal, not all businesses in the restaurant industry performed as well in 1987. The licensed restaurants recorded the lowest sales growth (3%) of the industry in 1987.

Family Food Budget Includes More Restaurant Spending

Canadian families are preparing fewer meals, according to the 1986 Family Expenditure Survey. Families increased their spending on restaurant meals by 13% between 1982 and 1986. Over the same period however, their spending on groceries did not change, suggesting that the food services industry is gaining from the retail/grocery sector (Table 2).

In 1986, Canadian families spent close to $5,000 on average for food, 3% more than in 1982. One quarter was spent on restaurant meals and take-out foods, up from 23% of the food dollar in 1982.

▸*Continued from page 1*

However, food spending patterns differ depending on whether consumers are at home or travelling for more than one night. Indeed, while at home or on same-day trips, Canadian families averaged $1,038 on restaurant meals in 1986 and more than three times that amount on retail food.

On the other hand, while on overnight trips, restaurant meals averaged $205 per family in 1986, whereas spending on retail food stood at $62 per family. Although family spending on retail food in 1986 was about three times less than that on restaurant meals, retail food purchases on overnight trips have gone up by 63% since 1982, compared to a 12% increase in restaurant spending. This suggests that an increasing portion of the travel dollar is now going to the food retailers.

Childless Families Spend the Most on Restaurants

Family spending[1] on restaurant meals vary significantly according to family size and composition. Large-size families tend to spend less per person on restaurant meals than do the smaller ones: the larger the family gets, the lower the spending per person tends to be. And this trend holds true whether at home or on overnight trips.

For instance, unattached individuals reported an average of $828 on restaurant purchases in 1986, while families of two to four persons averaged $478 per person (Table 3). As for families of five or more, each member spent $285 on average.

Also, families of equal size spend differently, depending on whether they include children or not. While at home or on day trips, all-adult families of size two to four spent an average of $1,138 on restaurant meals in 1986, which was 7% more than the amount spent by families of the same size with one or more children. Also, these all-adult families reported 33% more on restaurant purchases made on overnight trips.

[1] Family spending in this article excludes all expenditures reimbursed during the reference year.

Table 1
Restaurant Revenues, 1982 to 1987

	1982	1983	1984	1985	1986	1987	Real percentage change[1] 1982/86	Real percentage change[1] 1986/87
	in billions of 1987 dollars						per cent	
Total	12.0	11.9	12.3	12.8	13.5	14.2	12	5
Restaurants licensed	5.4	5.3	5.4	5.7	6.1	6.3	13	3
Restaurants unlicensed	3.2	3.4	3.6	3.6	3.8	4.0	19	5
Take-outs	1.5	1.4	1.4	1.5	1.6	1.8	6	13
Caterers	1.0	0.9	0.9	1.0	1.0	1.1	-3	11
Taverns	0.8	0.9	0.9	1.0	1.0	1.0	15	3

[1] Percentages were calculated on unrounded data.
Source: *Restaurants, Caterer and Tavern Statistics, Catalogue No. 63-011.*

Table 2
Family Food Expenditures, 1982 and 1986

	1982	1986	Real percentage change
Family characteristics			per cent
Estimated families ('000,000)	8.4	8.9	5
Average family size	2.7	2.7	0
Average family spending	In 1986 dollars		
Locally and on day trips	4,630	4,715	2
Restaurants, etc.	913	1,038	14
Retail/grocery	3,717	3,677	-1
Overnight trips	221	267	21
Restaurants, etc.	183	205	12
Retail/grocery	38	62	63
Total	4,851	4,982	3
Restaurants, etc.	1,096	1,243	13
Retail/grocery	3,755	3,739	0

Source: *Family Expenditure Survey, 1982 and 1986.*

Table 3
Restaurant Spending by Family Size and Composition, 1982 and 1986

	One person	Two to four persons: Total	Two to four persons: All adults	Two to four persons: At least one child	Five or more persons
Family characteristics - 1986					
Estimated families ('000,000)	2.1	5.6	3.4	2.2	1.2
Average family size	1.0	2.8	2.4	3.5	5.3
Average family spending - 1986			Dollars		
Food purchased from restaurants	828	1,337	1,404	1,236	1,523
Locally or on day trips	726	1,105	1,138	1,057	1,261
While on overnight trips	102	232	266	179	262
Real percentage change - 1982/86			Per cent		
Food purchased from restaurants	3	15	17	12	19
Locally or on day trips	4	15	17	13	20
While on overnight trips	-9	17	20	9	13

Source: *Family Expenditure Survey, 1982 and 1986.*

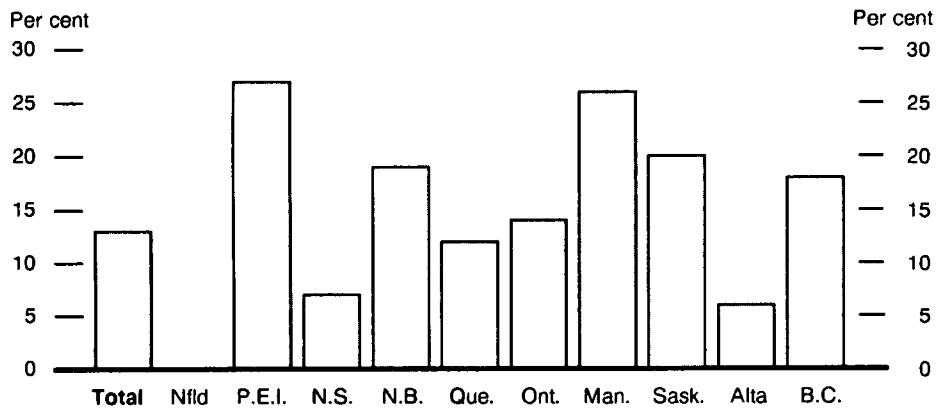
Table 4
Restaurant Consumption Per Family by Province of Residence, 1986

	Nfld	P.E.I.	N.S.	N.B.	Que.
Estimated families	160,480	46,500	294,410	220,420	2,354,180
Average family spending			Dollars		
Food purchased from restaurants	734	712	846	897	1,141
Locally and on day trips	610	609	741	725	976
While on overnight trips	125	104	105	172	164

	Ont.	Man.	Sask.	Alta	B.C.
Estimated families	3,197,060	365,160	344,950	809,530	1,056,670
Average family spending			Dollars		
Food purchased from restaurants	1,403	1,194	1,010	1,373	1,264
Locally and on day trips	1,169	1,013	806	1,112	1,035
While on overnight trips	234	181	204	260	229

Source: *Family Expenditure Survey, 1986.*

Chart 1
Real Change in Restaurant Spending, by Province, 1982 and 1986



Source: *Family Expenditure Survey, 1982 and 1986.*

Continued from page 2

Restaurant spending by these all-adult families has also increased more rapidly since 1982, especially expenditures made while travelling overnight. In 1986, all-adult families of size 2-4 spent 20% more on restaurant food than they did in 1982 while on overnight trips, compared to 9% for families of equal size with at least one child.

Albertans Biggest Restaurant Consumers While Travelling

Eating out in restaurants differs in each province. Provincial differences do exist in the amount of money spent by each resident family on restaurant meals. And they vary a lot.

In 1986, Ontario residents reported spending $1,403 per family on restaurant meals, recording the highest spending average of all the provinces (Table 4). During the same year, Prince Edward Island families spent only $712, half the expenditures of Ontario families. While averaging less than $900 per family in Newfoundland, New Brunswick and Nova Scotia, family expenditures on restaurants ranged from $1,010 to $1,373 per family in the province of Quebec, the Prairies and British Columbia.

When it comes to purchasing meals from restaurants while travelling overnight, Albertans tend to spend more than any other Canadian family. In fact, Albertan families spent an average of $260 in 1986, compared to $234 by Ontarians. Overnight travel spending on restaurants reached its lowest level in Prince Edward Island, at $104 per family.

Prince Edward Island families recorded the largest gain in the amount of money spent annually in restaurants during the 1982-86 period (Chart 1). In 1986, Prince Edward Islanders reported a 27% growth over 1982 in restaurant spending. During this period, only three provinces registered increases of less than 8%, including Newfoundland, where restaurant purchases per family remained at the same level between 1982 and 1986.

Families Prefer Table Service Restaurants on Overnight Trips

Although the restaurant industry includes different types of restaurants, each one offering a unique range of food and services to attract and cater

▸ Singles spent an average of $828 in restaurants during 1986...

▸ Table service outlets receive 83% of travellers' restaurant spending...

Table 5

Distribution of the Family Restaurant Dollar by Food Service Outlet and Type of Meal, 1986

	Locally and on day trips	Overnight trips
	Percentage	
Type of restaurant		
All types	100	100
Table service restaurant	52	83
Eat-in or drive-in	12	8
Take-out or delivery	15	3
Cafeteria and other	21	5
Meal occasion		
All types	100	100
Breakfasts	5	11
Lunches	34	24
Dinners	49	58
Between-meal food	12	6

Source: *Family Food Expenditure Survey, 1986.*

▸*Continued from page 3*

to specific segments of the population, the majority of Canadian families still prefer eating out in table service restaurants, especially when they travel. In 1986, table service outlets received 83% of all the money spent by families on restaurant meals while travelling overnight.

Restaurant type usage tends to be more diversified when it comes to purchasing restaurant meals locally or on day trips. In 1986, while 52% of all restaurant purchases for local and day trip consumption were made in table service outlets, 27% went to fast-food restaurants, and the rest to cafeterias.

Families Spend the Most On Dinners

Whether locally or on day trips, Canadian families spend more on dinners than any other meal occasion. In 1986, 58% of all purchases made in restaurants while travelling overnight were done at dinner time, compared to 49% when including the local and day trip consumption. But, Canadian families spend 24% of their restaurant dollar on lunches while on overnight trips, which is 10% less than they do at home or on day trips. (Table 5).

Eating out in restaurants is taking a larger place in every day activity. A meal at a restaurant is often being ranked near the top of the list of activities to do when at home or travelling. If the Canadian appetite for restaurant food continues to increase at the same rate, better days are yet to come for the restaurant industry.

Data Sources:
Family Expenditure Survey, 1982 and 1986, Catalogue No. 62-555 and special tabulations; Family Food Expenditure in Canada, 1982, Catalogue No. 62-554; Restaurant, Caterer and Tavern Statistics, Catalogue No. 63-011; Consumer Prices and Price Indexes, Catalogue No. 62-010.

Jocelyn Lapierre is a Senior Analyst with the Travel, Tourism and Recreation Section, Education, Culture and Tourism Division.

Travel-log

We've Changed...
Starting with volume 7, Travel-log has evolved into a new format. In order to serve you better, this quarterly publication now includes a broader spectrum of topics.
Areas to be covered include regional trends in tourism, changing tourism markets and tourism implications of economic and demographic changes. Readers will learn how business and government are successfully applying tourism statistics in program development, marketing strategy and policy formulation.

TRAVEL-LOG *is now a member of* ***TOURISCOPE****, a family of tourism-related publications. Each issue will keep you informed of recent tourism-related publications and data releases from Statistics Canada.*

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MARKETS

Record Number of West Germans Visit Canada

By John Pachereva

West Germans are the world's most frequent globe trotters. No other country spends as much money on travel or as many nights abroad.

For Canada, West Germany represents the third most important overseas market, after Great Britain and Japan. Until 1986, they occupied second position, but have been outpaced by the rapid influx of Japanese travellers throughout 1987.

In 1987, nearly 300,000 West Germans visited Canada - the highest visitation ever from that country. Compared to 1980, this represents a 26% growth. Although the majority of this market tends to stay an average of 2 weeks in Canada, there has been a noticeable rise in the number of West German travellers taking a day side-trip from the United States; 59,000 in 1987 versus 48,000 in 1980 (Chart 2).

Fluctuating economic conditions throughout the 80's have influenced German travel abroad. During the economic recession of 1981/82, 9% fewer West Germans travelled to Canada - the first decline in 16 years. Travel from Germany did not recover until 1986.

Much of the recent increase in traffic can be attributed to Germany's economic prosperity, which has resulted in a rapid rise in the strength of the deutschmark worldwide. Throughout the 80's, the value of the mark has fluctuated. In 1984, German travellers were exchanging their mark for only 0.46 Canadian, the lowest value recorded in the decade (Chart 3). In 1986, the mark had risen to 0.64 and jumped to 0.74 by 1987. Such favourable exchange rates have no doubt influenced the fact that West German travellers spend an average of $571 per trip (excluding air fares) - the highest among all European travellers.

An increasing number of West Germans are travelling to Canada to visit friends or family. Almost 42% identified visiting friends or family as the main purpose of their trip in 1987 compared to 38% in 1980. On the other hand, the pleasure travel market share has declined slightly from 1980 levels. Business trips, which account for the smallest share, grew 26%.

Ontario attracts the largest volume of German travellers to Canada (39%). Germans also frequently pick British Columbia as a destination (25%).

Visiting national parks and wilderness areas are frequent activities of West German tourists according to a pleasure travel market study conducted by Tourism Canada. This study also reveals that when identifying Canada's top attributes, the highest rankings were given; to seeing wildlife in a natural setting, fishing/hunting and outstanding scenery.

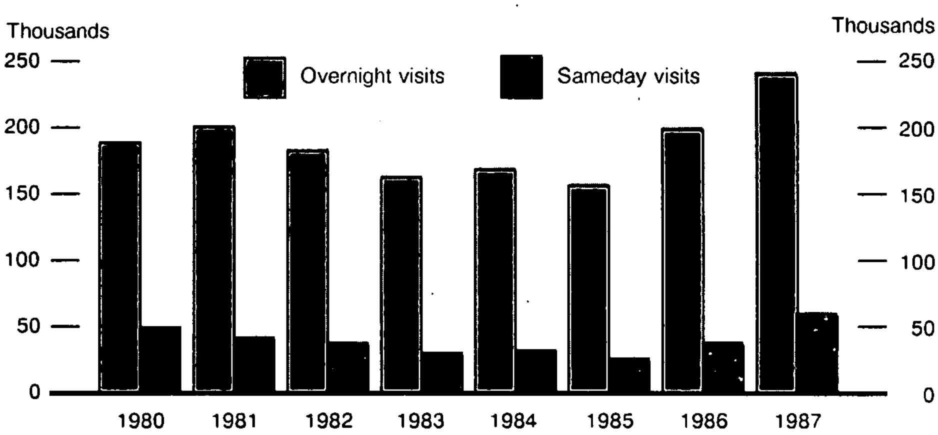
On the other hand, their perception of Canada does not conjure up images of lively, historical cities and diverse culture. More intense marketing of Canada's cultural diversity and sophisticated urban areas could lead to a further expansion of the German pleasure travel market.

Early indications are that this trend is continuing this year. Preliminary estimates for the first five months of 1988 show that approximately 20% more Germans visited Canada compared to the same period in 1987. The German and Japanese markets will be interesting to watch over the remainder of this year.

Data Sources:
Touriscope: International Travel, 1986, Catalogue No. 66-201 and special tabulations. Pleasure Travel Markets to North America: West Germany; Tourism Canada, 1987.

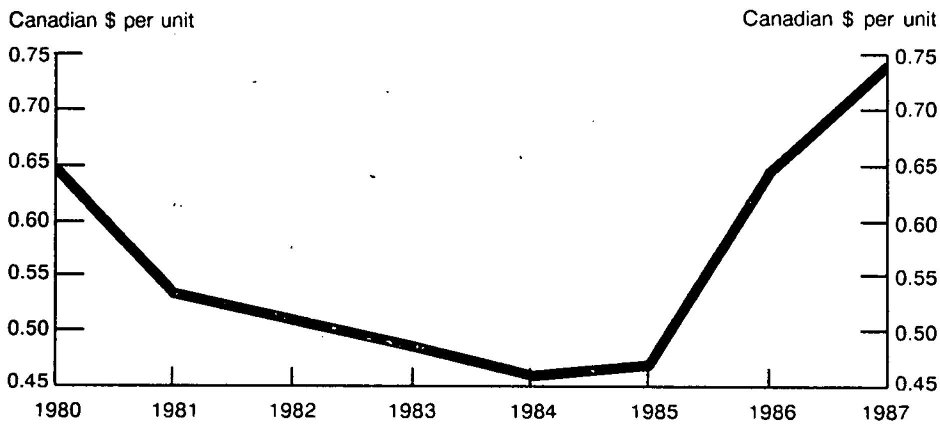
John Pachereva is a Researcher with the International Travel Section, Education, Culture and Tourism Division.

Chart 2
West Germans to Canada, 1980–1987



Source: *Touriscope: International Travel, 1986, Catalogue 66-201.*

Chart 3
German Mark in Canadian Dollars, 1980–1987



Source: *Bank of Canada Review.*

Summer Vacation Travel

By Laurie McDougall

Oh those lazy, hazy, crazy days of summer.......the time when many Canadians take their annual vacation. Throughout the summer months (June to September) of 1986, Canadians took 7 million vacation[1] trips and stayed away a total of 77 million nights (Table 6). Compared to 1984, travellers embarked on 14% more vacation trips, with much of the increase occurring in British Columbia - coinciding with Expo 86.

The vacation segment generates close to two thirds of the spending and nights away from home, while only accounting for a quarter of the overnight summer trips[2].

Vacationing in another province was characteristic of close to half of these travellers (44%). While summer vacationers predominately drive, they are more prone to travel by plane than other travelling Canadians. Almost half of their holidays lasted two weeks or more.

Home away from home

Vacationing Canadians stay with friends or relatives most often - 4 out of 10 nights. Camping and going to the cottage are also popular among summer vacationers. Motels or hotels accounted for 12% of all nights (Table 7).

In 1986, travellers who stayed at a hotel or motel during a vacation, spent half of their nights in other types of accommodation (Chart 4). The majority indicated staying with friends or relatives in addition to their hotel and motel nights. Since vacationers using hotel and motel accommodation tend to travel longer distances, they are probably more inclined to take side trips while visiting friends or family. Close to 8 out of 10 trips were more than 400 miles away from home in 1986.

Cottagers, not surprisingly, are the least likely vacation segment to use any other type of accommodation. Campers and travellers staying with friends or family members spent only a small proportion of their vacation nights elsewhere.

Table 6
Domestic Travel During the Summer Months, 1986

	Total	Short getaways (1-4 nights)	Vacation travel[1] (5 + nights)	% of total travel
		000,000's		%
Person-trips	28.7	21.7	7.0	24
Person-nights	122.9	45.9	77.0	63
Expenditures	$3,300.0	$1,300.0	$2,000.0	61

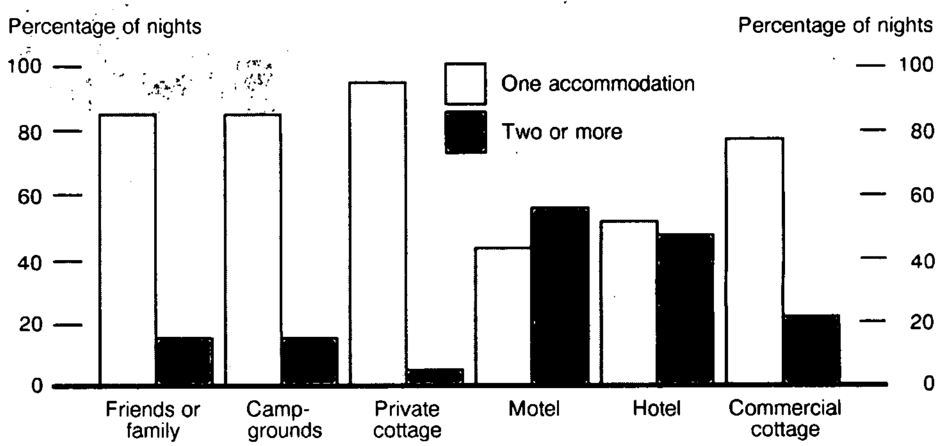
Source: *Canadian Travel Survey, special tabulations.*

Table 7
Summer Vacation Accommodation Usage, 1986

	Nights	Distribution
	000,000's	%
Total	77.0	100
Friends or relatives	33.1	43
Private cottage	14.8	19
Camping	14.3	19
Motel	5.4	7
Hotel	4.0	5
Commercial cottage	2.6	3
Other	2.8	4

Source: *Canadian Travel Survey, special tabulations.*

Chart 4
Distribution of Vacation Nights, 1986



Source: *Touriscope: International Travel, 1986, Catalogue 66-201.*

1 Summer vacation travel includes trips of 5 nights or more taken for pleasure or visiting friends or relatives and ending in June, July, August or September.
2 Includes overnight trips taken for pleasure or visiting friends or relatives.

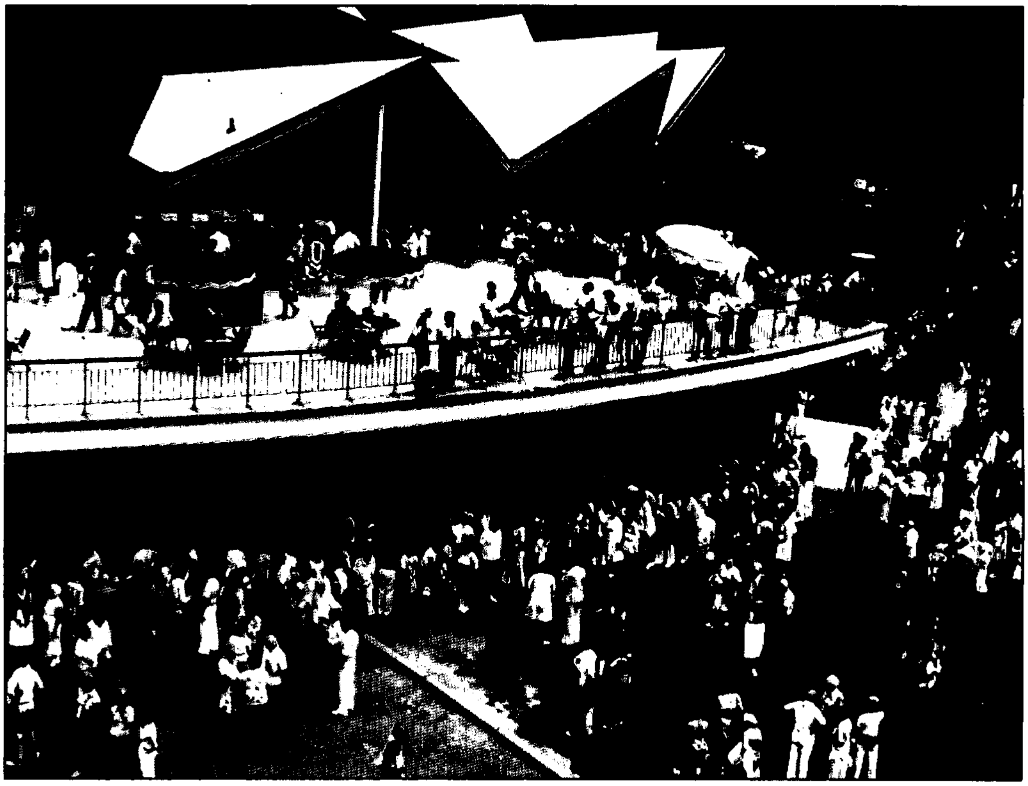
Data Sources:
Canadian Travel Survey, special tabulations.

Laurie McDougall is a Senior Analyst with the Travel, Tourism and Recreation Section, Education, Culture and Tourism Division.

Table 8
Performing Arts Industry, 1986

	1986 Total	Theatre	Music	Dance	Opera
Companies	298	180	64	42	12
Performances ('000)	36.0	30.6	2.5	2.2	.6
Attendance ('000,000)	11.4	6.9	2.4	1.5	.6
Average per performance *	332	237	1,009	740	848

(*) Includes only those companies which reported values for both attendance and performances.



PROFILE

Tourism and the Performing Arts

By Mary Cromie

The curtain rises. It could be a performance by the Edmonton Symphony, or a play by Bernard Shaw at Niagara-on-the-Lake, but whatever the cultural event, tourists are seated in the audience. The importance of the relationship between the arts and tourism is being increasingly recognized. The first-ever conference on Tourism, Culture and Multiculturalism, held earlier this year in Montreal is testimony to this.

The Performing Arts Industry

Close to 300 theatre, dance, music and opera companies[1] entertained a Canada-wide audience in excess of 11 million in 1986. Audience attendance has fluctuated over the surveyed years[2], but overall has increased 7% between 1982 and 1986. Over the same period, the number of performances offered has increased 12%[3]. In 1986 alone, almost 36,000 performances were given by performing arts companies (Table 8).

Theatre companies far exceeded those of other disciplines in terms of both number of performances given and number of people attending them. At the same time however, average attendance per performance was significantly lower for this discipline than for the others.

Each region's contribution of performances is usually mirrored by attendance figures. However, two provinces stand out as exceptions to this close correlation. Ontario offers 31 percent of all performances while attracting 37 percent of the country's audiences. Conversely, British Columbia, although showing 23 percent of performances drew only 16 percent of total audiences.

This regional pattern is in part attributable to different discipline mixes between provinces. Ontario, with two major theatre festivals - Shaw and Stratford - is unique in being able to attract large audiences to an extensive theatre program.

Furthermore, tourists are probably the main clientele at these two theatres. In most circumstances however, it is more difficult to assess how many tourists are attending any given performance, as audience make-up will vary by type of performance, location and even season.

Ticket sales may be an indicator of tourist participation. People who buy subscriptions are less likely to travel from out of town, whereas single ticket purchasers would perhaps include more tourists. Ticket sales vary according to type of performing arts event. For example, theatre and dance companies sell predominately single tickets as opposed to subscriptions (averaging a 70 to 30 split), while music and opera companies show a reverse pattern (35 to 65 split).

Tourists might therefore be more likely found among theatre goers than at other cultural events, while music and opera performances are less likely to have as many tourists in the audience. Ontario theatre companies show a stronger split among ticket sales; 78% for single ticket sales versus 22% subscription sales, while the P.E.I. theatre scene includes the Charlottetown Festival which has no subscription ticket sales at all.

1 Data obtained from Statistics Canada's annual Survey of Performing Arts (non-profit companies). In 1986, 298 companies responded.
2 A file of companies common to the years 1981 to 1986 was used for all percentage change calculations.
3 Percentage increases do not take into account the introduction of new companies into the survey over these five years.

The Travelling Cultural Buff

Making connections between tourism and the performing arts can be done by examining the results from the Canadian Travel Survey. In 1986, Canadians said that approximately 4.3 million of their domestic trips involved some type of cultural[4] pursuit. Eight out of 10 trips (3.4 million) involved at least one overnight stay.

The summer time, particularly the month of July, is when the majority of travellers indicated going to a cultural event. Most of these travellers stayed with friends or family - 56% of overnight trips in 1986. Hotels and motels were used on 20% of culture related travels, while surprisingly campers and cottagers accounted for 17%.

More women than men attended a cultural event while travelling - 55% versus 45%. More than 40% are college or university graduates, while 30% are professionals. Incomes are slightly more upscale, with 11% reporting a household income of $70,000 and over, compared to 8% for all travellers.

The tourism industry is putting more emphasis on the cultural diversity of Canada. The potential role of the performing arts industry in attracting tourists both from within and outside Canada is immense.

[4] In 1984 and 1986, respondents to the Canadian Travel Survey were asked if they attended cultural events (live theatre presentations or concerts) while travelling more than 80 km from home.

Data Sources:
Survey of Performing Arts, special tabulations; Canadian Travel Survey, special tabulations.

Mary Cromie is a Senior Analyst with the Culture Statistics Programme, Education, Culture and Tourism Division.

PROFILE

Fore! - Golf on the Upswing

By Laurie McDougall

Its a sunny afternoon in the summer or the fall and many Canadians can be found out on the golf course. Results from various surveys indicate that interest in golf is gaining momentum, a trend that could be of interest to the travel industry.

The last National recreation survey (1981) revealed that there were 2 million Canadians out on a golf course at least once during the year. Compared to an earlier recreation survey (1976), there were 32% more golf participants. The 1981 survey found that the majority of golfers were under 40 years of age, however, older golfers (50 and over), tended to be the more active players. They reported teeing off two or more times per week.

The growth in golf courses between 1983 and 1985 is indicative of the increasing popularity of this sport. Between 1983 and 1985 the number of golf courses has grown from 656 to 864 according to the Survey of Selected Service Industries. Over half of these golf courses earned under $250,000 each for a total of $60 million in revenues in 1985. Golf courses earning more than $250,000 each, reported revenues of almost $350 million.

In 1986, the Family Expenditure Survey revealed that 7.4% of households had expenditures on golf equipment compared to 6.5% in 1982. These households spent an average of $162 on golf equipment in 1986. Approximately 3.8% of households spent $474 on golf memberships in 1986, up from 3.3% in 1982.

Coinciding with these increases are a rise in the number of golf equipment imports. In 1987, Canada imported 1.9 million dozen golf balls, 17% more than a year ago and 4 times the number imported in 1980. Approximately 482,000 golf clubs were imported in 1987 compared to just 195,000 in 1980.

With people retiring at an earlier age, more women taking up the sport, growth in occupational groups that are most likely to play and older population growth trends - golf could be one of the fastest growing recreational activities.

Data Sources:
Culture Statistics, Recreational Activities, 1976; Fitness and Lifestyle in Canada, Canada Fitness Survey, 1981; Survey of Selected Service Industries, 1983-1985, Catalogue No. 63-231; Imports by Commodity, Catalogue No. 65-007; International Trade Division, special tabulations. Family Expenditure Survey, 1982 and 1986, Catalogue No. 62-555, special tabulations.

REGIONS

Focus on Montreal

Cafés, artisans, bistros, french cuisine, boutiques, history, and culture - just some of the reasons why tourists visit Montreal each year. In 1986, Canadians selected Montreal as a destination on 5.8 million trips, up from 4.6 million in 1984. Trips lasting at least one night totalled 3.8 million, up from 3.1 million in 1984.

Non-Quebeckers to Montreal

Canadians from outside the province of Quebec took approximately 1.4 million overnight trips to Montreal in 1986. These travellers generated over a third of the Montreal-bound domestic market.

Ontarians accounted for 88% (1.3 million) of the non-resident overnight travels in 1986. Torontonians and Ottawans were the most likely residents of Ontario to visit Montreal, accounting for 48% and 41% respectively.

Business was the most frequently cited purpose for out-of-province travellers to Montreal. In 1986, 4 out of 10 trips involved business activity. Non-residents also travel to Montreal to see friends or family (33%), while some come for a holiday (22%). Montreal visitors tend to stay with their friends or family (63%) or in a hotel (27%).

International Visitors

American and overseas visitors are also an important travel market for Montreal. Although customs' data does not provide information on where visitors are headed once they cross the border, they can provide some indication of tourism flows close to Montreal.

Dorval and Mirabel airports, Lacolle and Philipsburg land ports and Montreal seaport are probably the most significant customs' points for potential visitors to Montreal. Visitors arriving via Ontario border crossings which are close to the Quebec border could also be Montreal-bound.

Lacolle customs port, which is situated along the New York border, welcomed the largest number of visitors to Quebec - 905,000 in 1987, up slightly from a year ago. Dorval airport was the second busiest Quebec customs port, followed closely by Philipsburg which is located above the Vermont border.

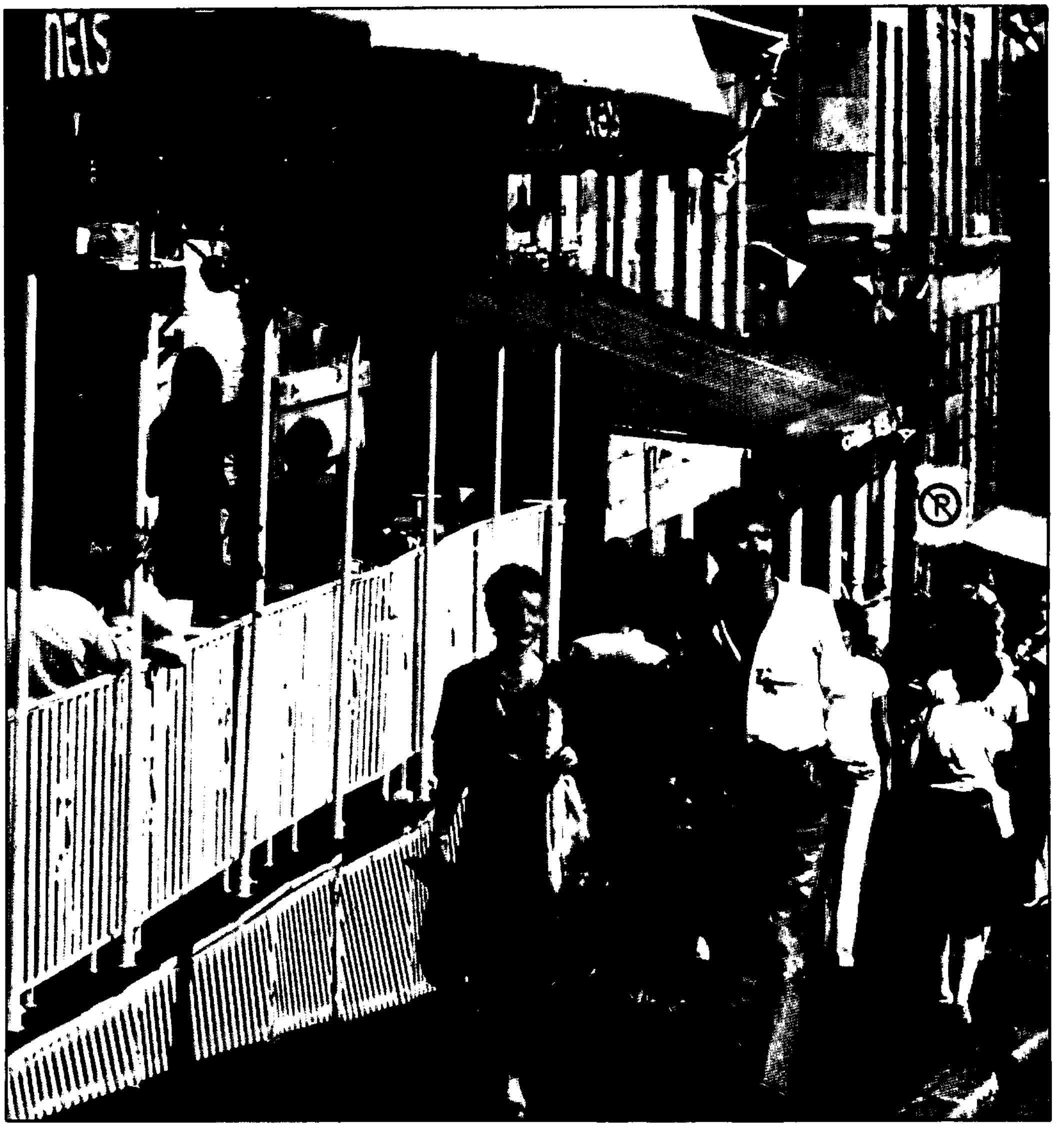
Over 2 million American and overseas visitors entered these five ports in 1987 - up slightly from 1986 (Table 9). Most visitors stayed in the province for at least one night (76%). Excursionists or travellers visiting Canada just for the day were most likely to cross at one of the two land ports.

Data Sources:
International Travel Survey, special tabulations; Canadian Travel Survey, special tabulations.

Table 9
International Visitors by Customs' Ports, 1987

1987	Americans Total	Americans Overnight	Overseas residents Total	Overseas residents Overnight
	000's			
Total	1,799.2	1,282.4	402.9	62.0
Land ports				
Lacolle	852.1	509.4	53.1	49.9
Philipsburg	453.4	282.5	13.5	12.1
Airports				
Dorval	471.5	468.5	77.2	n.a.
Mirabel	22.2	22.0	259.1	n.a.

Source: *International Travel Survey, special tabulations.*



DEMOGRAPHIC HAPPENINGS

The Changing Family

Adapted from Statistics Canada Daily

The make-up of the typical family has undergone numerous changes over the past few years. According to the 1986 Census, there were 6.7 million families in Canada, up 6% from 6.3 million in 1981.

Although there are more families than earlier years, the growth rate has slowed down from 10% between 1976 and 1981. Slower growth is attributed to people marrying at a later age, as well as the aging of the population.

The size of these families has been shrinking from an average of 3.9 people in 1961 to 3.1 in 1986. Lower fertility rates, as well as the increase in lone-parent families have contributed to this trend. Although lone-parent families comprise just 13% of all families, this segment of the population grew by 20% between 1981 and 1986.

Childless couples and empty nesters are also growing in numbers. In 1986 these families accounted for close to a third of all families. This represented a 9% increase over 1981, and far outpaced the growth of families with children at home.

Approximately 1.5 million families have children under six years of age - accounting for 22% of all families in Canada.

Despite a slower growth rate, the "traditional" husband-wife-child(ren) accounted for 70% (4.5 million) of all families.

Data Sources:
The data summarized here represent only a sample of the information from the 1986 Census of Population. A wide range of 1986 Census products and services, including reference products, data tables and maps are now available. For further information, contact your local Statistics Canada regional reference centre.

Table 10
Selected Family Characteristics, Canada 1986

	1976*	1981	1986
		000,000's	
Families in private households	5.7	6.3	6.7
Husband-wife families	5.2	5.6	5.9
With no children at home	1.7	2.0	2.2
With children at home	3.4	3.6	3.7
With children under 6 years	1.3	1.4	1.3
Lone-parent families	.6	.7	.9
With children under 6 years	.1	.1	.2
Average number of children per family	1.5	1.4	1.3

* The 1976 data are based on the 1/3 sample of the population.

A CASE IN POINT

ADI Ltd. Projects Future Camping Demand for Fundy National Park

By Ray Barton

Fundy National Park, located on the Bay of Fundy coast, presently attracts approximately 31,000 groups of campers. But what will be the camper demand by the year 2006? Does Parks Canada need more serviced or unserviced sites to keep up with demand?

Serveral data sources were consulted to answer these questions for Parks Canada. One key source was Statistics Canada's Household Facilities and Equipment Survey, which provides information on camping equipment ownership, by province and age group.

Key demographic characteristics of campers were reviewed to determine the effects of an aging population on future demand for camping activity. Special tabulations of ownership rates by region, by type of equipment and by age group were prepared by Statistics Canada.

ADI used these rates to predict ownership of overnight camping equipment for the years 1996 and 2006, based on the number of households projected by age group for those years. These data were then weighted by the number of camper party-nights by region of party origin for Fundy National Park, obtained from campground registration records.

It was concluded from this analysis that overall camping demand for this park is projected to increase by 15% between 1987 and 2006. However, significant differences occur in the projected ownership by type of equipment; tenting ownership increasing by 4% and travel trailers and motor homes increasing by 30%.

According to these projections, 96 additional sites are required in Fundy National Park by the year 2006. Due to the forecasted surge in travel trailers, mobile homes and vans, it is expected that there will be a greater demand for serviced sites.

Data Sources:
Household Facilities and Equipment Survey, 1987, Catalogue No. 64-202 and special tabulations.

Ray Barton is a Consultant with ADI Ltd. in Ottawa.

TRENDS

Travel Price Index, First Quarter 1988

By Jocelyn Lapierre

The year 1988 is starting on a good note for the traveller's pocketbook. The downward shift recorded in travel prices during the fourth quarter of 1987 has made its way into the first quarter of 1988. According to the first quarter Travel Price Index, prices went down by 1.5% over the last quarter of 1987.

The decline in the TPI was due to decreases in prices for inter-city transportation (-9%), which more than offset the increases recorded in the prices for food and admission to entertainment.

In comparison, the cost of all consumer goods as a whole, as measured by the Consumer Price Index, reached 141.4, slightly above the last quarter of 1987.

From a year ago, the TPI rose 2%, compared to a 4% increase in the CPI. Increases in the costs of admission to entertainment, accommodation and operation of automotive vehicles were the major contributors to this year-to-year growth in the TPI. Food prices posted an increase of 2% from a year earlier. However, a 7% decline in inter-city transportation prices significantly reduced the impact of these increases on the TPI year-to-year change.

Table 11
Travel Price Index and Components (Not Seasonally Adjusted, 1981 = 100)

TPI components	First quarter 1988	Per cent change: Previous quarter	Per cent change: Previous year
Inter-city transportation	162.7	-8.7	-6.6
Operation of automotive vehicles	141.6	-0.2	5.2
Traveller accommodation	151.4	-2.4	5.6
Food - total	133.8	0.9	2.0
Admission to entertainment	163.5	2.0	8.3
Consumer price index	141.4	0.8	4.1
Travel price index	**145.9**	**-1.5**	**2.4**

Source: *Consumer Price Index, Catalogue 62-001.*

ANNOUNCEMENT

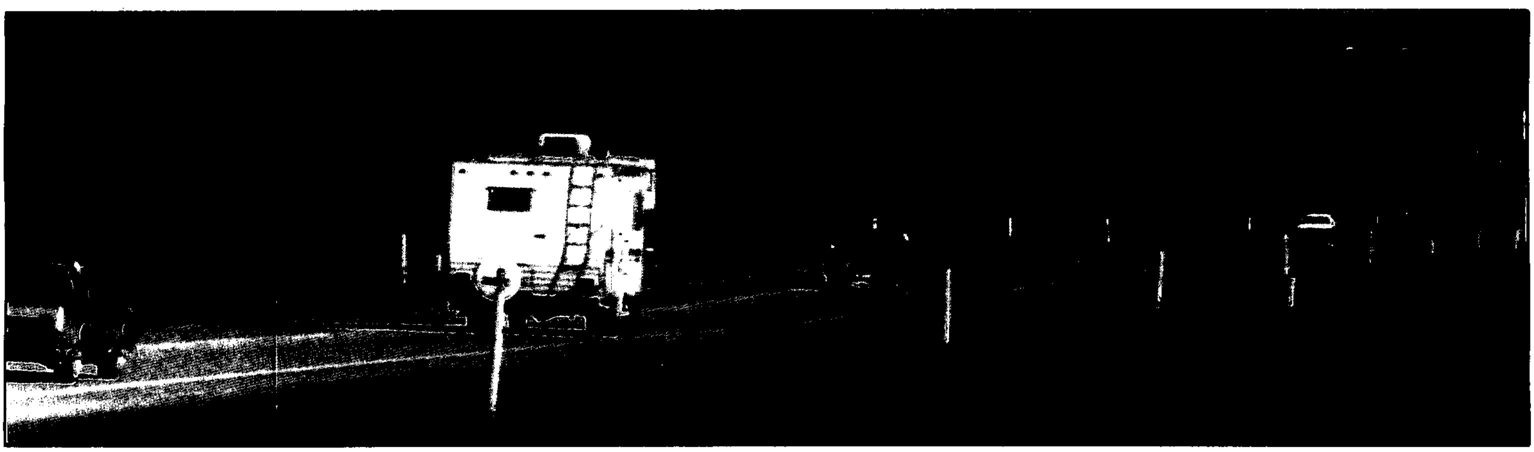
CANADIAN TRAVEL SURVEY - 1988

The CTS is underway again!

During the third week of April, 8,000 households across Canada (excluding the Territories) were interviewed about their travel during the months of January, February and March.

Find out how domestic travel patterns for the first quarter of 1988 compare with 1986 (the last year surveyed), in the next issue of **Travel-log.**

Tourism Canada is the sponsor of the basic survey while certain provinces sponsor increased sample sizes. For the remaining quarters of 1988, the questionnaire is being administered to some 16,000 households per quarter.



TOURISCOPE INDICATORS

		Quarter 1988	Percentage Change: Previous Quarter	Percentage Change: Previous Year
VISITORS TO CANADA				
From United States	T	5,595	-19.0	1.3
Overnight visits	T	1,460	-24.9	5.9
By auto	T	909	-30.6	1.8
From Overseas	T	290	-22.5	31.8
Top Five Countries				
United Kingdom	T	44	-36.2	22.2
Japan	T	36	-10.0	56.5
West Germany	T	27	-15.6	22.7
France	T	20	-23.1	25.0
Italy	T	10	-28.6	25.0
CANADIANS OUTSIDE CANADA				
To United States	T	9,896	-1.7	11.4
Overnight visits	T	2,649	12.1	4.6
By auto	T	1,380	-6.6	6.6
To Overseas	T	924	84.8	8.2
INDUSTRY SECTOR				
Airline passengers	T	6,313	22.7	7.2
Airline passenger-km	M	13,064	33.4	11.7
Inter-city bus passengers	T	4,751	-4.4	-6.5
Restaurant receipts	M	3,422	-5.8	14.6
PRICES				
1981 = 100 (not s.a.)				
Travel price index		145.9	-1.5	2.4
Consumer price index		141.4	0.9	4.1
Restaurant meals		141.1	1.2	3.4
Inter-city transportation		162.7	-8.7	-6.6
Gasoline		133.6	-3.9	5.3
ECONOMIC				
1981 = 100 (s.a.)				
Gross domestic product	M	388,723	0.6	...
Amusement and recreation	M	2,535	3.7	...
Accommodation and food services	M	8,652	1.2	...
Personal disposable income per capita		14,350	-0.8	...
LABOUR FORCE				
Labour force(s.a.)	T	13,322	0.7	...
Unemployed	T	1,051	-3.2	...
Employed	T	12,271	1.1	...
Accommodation and food services	T	684	0.6	...
EXCHANGE RATES				
In Canadian Dollars:				
American Dollar		1.2674	-3.3	-5.3
British Pound		2.2776	-1.0	10.4
Japanese Yen		0.009901	2.2	13.3
German Mark		0.7564	-1.8	3.9
French Franc		0.2237	-1.9	2.4
Mexican Peso		0.000559	-20.3	-57.7

(M) Millions. (T) Thousands. (s.a.) seasonally adjusted. (...) not applicable.