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# CANADA'S EXPORT STRATEGY

## *The International Trade Business Plan*

1995/96

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***An Integrated Plan for Trade, Investment  
and Technology Development***

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**The International Trade Business Plan** is made up of an **Overview** highlighting Canada's international business development priorities, and a series of **Industry Sector Strategies**, which include lists of planned international activities. The following documents are available:

- Overview
- 1. Advanced Manufacturing Technologies
- 2. Agriculture and Food Products
- 3. Aircraft and Parts
- 4. Automotive
- 5. Biotechnologies
- 6. Business, Professional and Educational Services
- 7. Chemicals, Plastics and Advanced Materials
- B. Construction Products
- 9. Consumer Products
  - Apparel and Fur
  - Textiles
  - Footwear
  - Sporting Goods (including recreational watercraft)
  - Tools, Hardware and Housewares
  - Residential Furniture
  - Business and Institutional Furniture
- 10. Cultural Industries
- 11. Defence Products
- 12. Environmental Equipment and Services
- 13. Fish and Sea Products
- 14. Forest Industries
- 15. Information Technologies and Telecommunications
  - Sector Overview
  - Computers and Peripheral Equipment
  - Electronic Components
  - Geomatics
  - Instrumentation
  - Software Products and Computer Services
  - Telecommunications
- 16. Medical and Health-Care Products and Services
  - Medical Devices
  - Pharmaceuticals
  - Health-Care Services
- 17. Minerals and Metals
- 18. Oil and Gas Products and Energy Equipment
- 19. Power Equipment
- 20. Primary/Secondary Industrial Machinery
  - Mining, Forestry, Pulp and Paper
  - Agricultural Technology, Machinery and Equipment
  - Ocean and Marine Shipboard Technology
- 21. Rail and Bus Equipment
- 22. Space
- 23. Tourism

For information on how to receive the Overview, or additional Industry Sector Strategies, please call: **1-800-267-8376**

All monetary figures in this document are expressed in Canadian dollars unless otherwise indicated.

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*Aussi disponible en français sous le titre Tourisme.*



# Tourism

**T**he tourism industry supplies goods and services to business and pleasure travellers. The industry comprises, to varying degrees, sectors and subsectors of other industries such as accommodation, passenger transportation, travel agencies, tour operators, recreation and amusement, rental and private cars, food service and retail trade.

## International Environment

The World Tourism Organization predicts that international travel will grow at the much reduced rate of 4 percent through the 1990s. This slow-down, coupled with vast growth in supply, has dramatically increased international competition. As a result, the industry has shifted its focus from growth through expanding markets to growth through increased market share. Consequently, tourism is now demand-driven rather than supply-driven.

Since the 1950s, tourism has emerged as one of the most important economic growth sectors. Globally it is a \$2.65-trillion industry. A decade ago, Canada ranked tenth in terms of international tourism revenue, and currently ranks eleventh.

Throughout the 1980s, Canada's international tourism revenue grew at an average annual rate of 10.8 percent, whereas globally the rate was 9.5 percent. Despite its above-average performance, Canada's share of the world tourism market shrank marginally from 2.23 percent to 2.15 percent over the same period.

In the United Kingdom, France and Germany, three of Canada's four major overseas markets, Canada outperformed the industry and grew faster than the global average, indicating improved competitiveness.

Canada's share of the Japanese market, its most lucrative overseas market, slipped slightly (0.6 percent) between 1989 and 1993 from 4 percent to 3.4 percent, as a result of strong competition.

The picture is not as encouraging for the United States, Canada's most important international market. Although revenue from the U.S.

market has grown by 7 percent annually over the past decade, the overall average growth rate in U.S. international tourism expenditures grew by 14.1 percent. As a result, Canada's market share fell from 36 percent at its highest level (Expo '86) to 27 percent in 1992 (during the recession). The most recent statistics (1993) indicate Canada's share of the U.S. international tourism market stands at 27 percent.

Increased competition in the international market presents a major hurdle that Canada's tourism industry must overcome if it is to grow and prosper.

## Canadian Position

Tourism is a \$26-billion industry in Canada — \$8 billion international, \$18 billion domestic (1993). It accounts for 4 percent of gross domestic product (GDP) and 5 percent of employment, generating over 550 000 jobs. Tourism is Canada's fourth-largest source of export revenue behind automobiles (\$28 billion), auto parts (\$10 billion) and business services (\$9 billion). While Canada's tourism industry ranks only eleventh worldwide, its rate of growth in the 1980s is surpassed only by the U.S. and Australia among Organization for Economic Co-operation and Development (OECD) countries.

Of major concern to the federal government is the growing deficit in Canada's travel account. Although most industrialized countries run travel account deficits, it is the rate at which Canada's deficit is growing that is cause for concern. In 1988, Canada's travel account deficit was \$2.9 billion; by 1992, it almost tripled to \$8.2 billion. At the root

of the deficit is the increasing number of Canadians who vacation outside the country, particularly in the United States.

Currently, however, the trend is reversing and the travel account deficit is decreasing, largely due to the weak Canadian dollar. The exchange rate between the Canadian and the U.S. dollar is encouraging Canadians to travel within Canada and, based on preliminary results, attracting a greater number of Americans to vacation here.

### **The U.S. Market**

The United States is by far Canada's most important international tourism market. In 1993, 10.2 million U.S. leisure travellers visited Canada for one or more nights, generating \$3.1 billion in export revenue.

The United States is experiencing solid recovery, except in California where the economy is still faltering and in New England where recovery started later and remains spotty.

Despite marginal increases in annual revenue, Canada's position in the U.S. market has been eroding. Over the past five years, U.S. domestic and international travel has grown by 12 percent. At the same time, U.S. person-trips to this country increased by 3 percent. While revenue is a better measure of performance than the volume of visits, these numbers nevertheless point to a serious deterioration in competitiveness.

Canada's declining performance in the U.S. market can be attributed to several factors, including:

- decreased popularity of touring vacations, Canada's hallmark product;
- increased popularity of single-destination vacations and cruises;
- increased competition from other destinations, including the United States; and
- increased investment in attractions in the United States.

On the positive side, Canada has a major opportunity at hand. Every U.S. dollar is cur-

rently worth about \$1.35 - \$1.40 in Canadian funds, rather than \$1.10 as was the case in 1992.

### **The European Market**

In 1993, 1.8 million European tourists, (an 8-percent increase over 1992) visited Canada, generating \$1.5 billion in export revenue. The three primary European markets, the United Kingdom, Germany and France, account for 69 percent of European receipts. Italy, Switzerland, the Netherlands and Belgium, in order of importance, account for another 17 percent of Canada's European receipts.

Competition in the long-haul European markets has intensified over the last five years. The marketing of new destinations, particularly those in the Asia-Pacific region, has increased substantially in Europe. Additionally, the United States is a perennial competitor, attracting Europeans with good air access and low travel cost, not to mention the country's constant presence in the international news.

### **The Asia-Pacific Market**

Canada's tourism marketing in the Asia-Pacific region is guided by a consortium of public- and private-sector interests. The consortium's marketing budget in 1993 was \$5.7 million: \$1.7 million from Tourism Canada and \$4 million from other consortium partners.

Japan is Canada's most lucrative overseas market. In 1993, 409 000 Japanese tourists injected over \$450 million into the Canadian economy. Japan ranks second only to the United Kingdom in terms of overseas visitors.

In the second half of 1992, Japan suffered an economic decline. The economy continued to weaken in 1993 as businesses reduced capital expenditures and consumer spending stagnated.

Although Canada posted a 5.9-percent increase in Japanese receipts in 1992, the number of Japanese visitors to this country actually declined. In 1993, the number of Japanese tourists increased

by 3.6 percent over 1992 and market share stood at 3.4 percent, compared to 4 percent in 1989.

The Asia-Pacific region also comprises emerging markets such as Taiwan and South Korea, as well as the secondary but more mature markets of Hong Kong and Australia. Combined, these markets accounted for more than \$222.7 million of Canada's export revenue from the Asia-Pacific region in 1993.

### **The Business Travel Market**

Business travel to Canada accounted for \$983 million in 1993, or 24 percent of international travel revenues. It represents an especially lucrative market for Canada in the United States because of that country's proximity and its position as the primary generator of international business meetings, conventions and incentive travel. Canada's major competitive advantage in the U.S. market is its services infrastructure and customer-service orientation. Customs, taxation and air-accessibility issues remain obstacles, as does the magnitude of marketing investment needed in this highly competitive market.

### **Strategic Direction**

The thrust of Canada's tourism strategy is to support and improve the Canadian tourism industry's international competitiveness and increase profitability to create jobs.

Customer demand, the strategy's primary driving force, guides product enhancement and development, and its fuel is information — information on what customers want and their travel behaviour, competitors, market trends, technology, and other elements that affect competitiveness.

### **The U.S. Market**

Canada's major competition in the U.S. market is the United States itself. While U.S. citizens travel extensively abroad (45 million international tourist trips annually), domestic travel dominates.

Americans take almost one billion domestic tourist trips a year.

Tourism Canada will continue to take a "segmented approach" to the diverse U.S. market. Given operating budget reductions, an alternate approach would substantially dilute our marketing resources.

Since 1992, Tourism Canada's strategy has been to concentrate on increasing the amount of marketing resources for the U.S. domestic travel market. The strength of this strategy has been reconfirmed by recent market research, which indicates that the more frequent U.S. visitors to this country also take many domestic pleasure trips.

In order of priority, the U.S. program is directed at:

- retired seniors, aged 55+ years with an annual household income of \$50 000+;
- middle-aged workers, aged 46-64 years with an annual household income of \$60 000+;
- baby boomers, aged 26-45 years with an annual household income of \$60 000+ (selected market niches).

Customer segments are further refined through the use of a travel index identifying households with a high likelihood of travel and an affinity for Canadian travel products.

### **The European Market**

Integrated marketing strategies are expected to result from increased partnerships between Tourism Canada, other levels of government and the private sector. Marketing activities will emphasize specific Canadian travel experiences as opposed to increasing general awareness. The program will concentrate on promoting culture, nature and outdoor activities.

In order of priority, the European program is directed at the United Kingdom, France and Germany. Culture and nature appeal to a potential six million long-haul travellers aged 30 to 54 years. Culture and comfort products largely target the United Kingdom, which has a potential market

of six million long-haul travellers aged 55 years and over. Sports and outdoor activities will be promoted to a potential eight million long-haul travellers aged 24 to 45 years.

### Asia-Pacific Market

The strategy is to position Canada as a high-quality, four-season travel destination in high-yield customer segments. Partnerships between government and the private sector will remain the key to marketing in the Asia-Pacific region. Direct marketing techniques will be used, and marketing will shift to new-growth customer segments. The priority in Japan is to shift visits from the peak season to the shoulder and off-seasons. More Canadian products will be developed and promoted along regional themes in Japan. The new Kansai International Airport will provide greater air capacity to the Kansai region as Air Canada opens new routes, making it possible to further promote the growing fully independent travel market in Japan.

In order of priority, the Japanese marketing program will focus on:

- female office workers aged 20 to 29 years;
- middle-aged workers, which includes full-moon couples (45-54 years) and family travellers (baby boomers and their children);
- niche markets, such as skiers, business incentive travellers and students.

Special attention will be given to the independent traveller in all of these customer segments. In the secondary markets of the Asia-Pacific region, high-yield customers will be targeted.

### The Business Travel Market

In order of priority, the Business Travel Market Program will:

- target marketing activities to create a favourable perception of Canada as a destination of choice for meetings;
- focus resources at the customer level through relationship marketing;

- address the specific needs and expectations of individual organizations;
- identify new business opportunities.

This will help increase the U.S. meetings market contribution to Canada's tourism receipts by \$75 million.

#### *Note:*

On October 25, 1994, the Prime Minister, the Right Honourable Jean Chrétien, announced the creation of a Canadian Tourism Commission. This new body will be directed by a Board composed of federal, provincial/territorial and private-sector representatives.

The Commission's main responsibility will be marketing Canada as a tourist destination to international and domestic tourists.

The federal government will provide base funding of \$50 million annually.

The creation of the Canadian Tourism Commission will have a major impact on Canada's 1995-96 Tourism International Trade Business Plan. It was not possible at the time of publication to outline the nature and direction of the change.

## Contacts

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235 Queen Street  
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and International Trade  
U.S. Trade and Tourism Development Division  
125 Sussex Drive  
Ottawa K1A 0G2  
Tel.: (613) 944-7344  
Fax: (613) 944-9119

## Tourism

| Activity  | Date   | Location                      | Dept. | Contact      |
|---|--------|-------------------------------|-------|--------------|
| <b>United States</b>  |        |                               |       |              |
| Soft-Adventure: NEBS to Chicago                                   | TBD    | Chicago                       | IC    | 902-566-7445 |
| Marketing: U.S. Middle-Age Segment                                | TBD    | United States                 | IC    | 613-954-3817 |
| Marketing: U.S. Baby-Boomer Segment                               | TBD    | United States                 | IC    | 613-954-3817 |
| Fishing and Hunting   | TBD    | Atlanta                       | IC    | 902-566-7445 |
| Atlantic Inns: NEBS to New York                                   | TBD    | New York                      | IC    | 902-566-7445 |
| Tourism: Round Table<br>(Eastern Seaboard/Central U.S. operators) | TBD    | Atlantic Canada               | IC    | 902-566-7445 |
| Meeting and Convention: NEBS to Chicago                           | TBD    | Chicago                       | IC    | 902-566-7445 |
| Small- and Medium-Sized Motel Operators: NEBS to Boston           | TBD    | Boston                        | IC    | 902-566-7445 |
| Soft-Adventure: NEBS to Boston                                    | TBD    | Boston                        | IC    | 902-566-7445 |
| Soft-Adventure  | TBD    | Atlanta                       | IC    | 902-566-7445 |
| National Association Senior Travel Planner Seminar/Workshop       | TBD    | Dallas                        | DFAIT | 214-922-9806 |
| Golf Canada (Cleveland)   | Feb-95 | Cleveland                     | DFAIT | 313-567-2340 |
| Dateline Canada   | Apr-95 | Los Angeles,<br>San Francisco | DFAIT | 213-687-7432 |
| National Tour Association Spring Exchange                         | Apr-95 | Memphis                       | N.B.  | 506-453-3984 |
| Spotlight Canada  | Apr-95 | Pittsburgh                    | DFAIT | 412-392-2308 |
| Spotlight Canada  | May-95 | Los Angeles                   | DFAIT | 213-687-7432 |
| Media Workshop  | May-95 | Boston                        | DFAIT | 617-262-3760 |
| Showcase Canada   | May-95 | New York                      | DFAIT | 212-596-1600 |
| Canada Club Card (U.S. Mature Leisure Travellers)                 | May-95 | U.S.                          | IC    | 613-954-3817 |
| Leading Tour Operators Seminar                                    | May-95 | New York                      | DFAIT | 212-696-1600 |
| Spotlight Canada "Rail"   | May-95 | Seattle                       | DFAIT | 206-443-1777 |
| American Association of Retired Persons                           | May-95 | Anaheim                       | N.B.  | 506-453-3984 |
| Outdoors Writers Association of America                           | Jun-95 | Orono                         | N.B.  | 506-453-3984 |
| Seniors Direct Mail Campaigns (2)                                 | Jun-95 | Boston                        | DFAIT | 617-262-3760 |
| Denver Representative Locator                                     | Jun-95 | Denver                        | N.B.  | 506-453-3984 |
| Multi-Modal Circle Seminars                                       | Sep-95 | Seattle                       | DFAIT | 206-443-1777 |
| Yukon Gold Rush Centenary Seminars                                | Sep-95 | Seattle                       | DFAIT | 206-443-1777 |
| Spotlight Canada  | Sep-95 | Washington, D.C.              | DFAIT | 202-682-1740 |
| Update Canada Seminar   | Oct-95 | Pittsburgh                    | DFAIT | 412-392-2308 |
| Society of American Travel Writers                                | Oct-95 | Los Angeles                   | DFAIT | 213-687-7432 |
| NEBS (Canadian Winter Products)                                   | Oct-95 | Chicago                       | DFAIT | 312-616-1860 |

Note: Dates and locations are subject to change.

| <b>Activity</b>                         | <b>Date</b> | <b>Location</b>               | <b>Dept.</b> | <b>Contact</b> |
|---|-------------|-------------------------------|--------------|----------------|
| National Tour Associations: Conventions | 31-Oct-95   | Dallas, Reno                  | IC           | 613-954-3870   |
| Ski Canada                              | Nov-95      | Detroit                       | DFAIT        | 313-567-2340   |
| Spotlight Canada                        | Nov-95      | Boston                        | DFAIT        | 617-262-3760   |
| Dateline Canada                         | Nov-95      | Los Angeles                   | DFAIT        | 213-687-7432   |
| NEBS Mission                            | Nov-95      | Cleveland, Detroit            | DFAIT        | 313-567-2340   |
| Senior Leaders Seminar/Marketplace      | Nov-95      | Miami                         | DFAIT        | 305-579-1600   |
| NEBS (Atlantic Canada)                  | Nov-95      | Boston                        | DFAIT        | 617-262-3760   |
| NEBS (First Nations)                    | Nov-95      | Seattle                       | DFAIT        | 206-443-1777   |
| National Tour Association               | Nov-95      | Dallas                        | N.B.         | 506-453-3984   |
| NEBS (Atlantic Canada)                  | Nov-95      | New York City                 | DFAIT        | 212-596-1600   |
| Seniors Seminars (4)                    | Dec-95      | Detroit                       | DFAIT        | 313-567-2340   |
| American Bus Association                | 04-Dec-95   | Fort Lauderdale               | IC           | 613-954-3870   |
| Adventure Canada                        | Jan-96      | Los Angeles                   | DFAIT        | 213-687-7432   |
| Dateline Canada                         | Jan-96      | Los Angeles,<br>San Francisco | DFAIT        | 213-687-7432   |
| Business Travel Seminar (Series)        | Jan-96      | Chicago                       | DFAIT        | 312-616-1860   |
| AAA Education Seminar/Marketplace       | Jan-96      | Cincinnati                    | DFAIT        | 513-762-7655   |
| Outdoor Adventure Canada                | Jan-96      | Buffalo                       | DFAIT        | 716-858-9500   |
| Bass Show                               | Jan-96      | Virginia                      | N.B.         | 506-453-3984   |
| Senior Marketplace                      | Jan-96      | New England                   | N.B.         | 506-453-3984   |
| Spotlight Canada                        | Jan-96      | Los Angeles                   | DFAIT        | 213-687-7432   |
| Group Tour Promos                       | Feb-96      | Chicago                       | DFAIT        | 312-616-1760   |
| NEBS (Atlantic Canada)                  | Feb-96      | Boston                        | DFAIT        | 617-262-3760   |
| Incoming U.S. Mission                   | Feb-96      | Canada/Various                | DFAIT        | 612-333-4641   |
| Strategic Matchmaking Tourism           | Feb-96      | Seattle                       | DFAIT        | 613-944-7348   |
| Spotlight Canada (3 cities)             | Feb-96      | U.S./Various                  | DFAIT        | 313-567-2340   |
| Spotlight Canada                        | Feb-96      | Dallas                        | DFAIT        | 214-922-9806   |
| Adventure Canada                        | Feb-96      | Washington, D.C.              | DFAIT        | 202-682-1740   |
| Spotlight Canada                        | Feb-96      | San Francisco                 | DFAIT        | 415-543-2550   |
| Spotlight Canada (South Florida)        | Feb-96      | Miami                         | DFAIT        | 305-579-1600   |
| Adventure Canada                        | Feb-96      | Boston                        | DFAIT        | 617-262-3760   |
| Spotlight Canada                        | Feb-96      | Cincinnati                    | DFAIT        | 513-762-7655   |
| Spotlight Canada                        | Mar-96      | Buffalo                       | DFAIT        | 716-858-9500   |
| New Exporters Mission                   | Mar-96      | Atlanta                       | DFAIT        | 404-577-6810   |
| Product Newsletter (Quarterly)          | Mar-96      | Los Angeles                   | DFAIT        | 213-687-7432   |
| Snapshots Canada Newsletter (Quarterly) | Mar-96      | Washington, D.C.              | DFAIT        | 202-682-1740   |
| Service Contract                        | Mar-96      | Canada                        | DFAIT        | 613-944-6903   |



| Activity                                      | Date   | Location      | Dept. | Contact      |
|---|--------|---------------|-------|--------------|
| Tourism Training                              | Mar-96 | Canada        | DFAIT | 613-944-6903 |
| Contact Management System (Computer)          | Mar-96 | Canada/Variou | DFAIT | 613-944-6903 |
| Post Marketplaces                             | Mar-96 | Canada/Variou | DFAIT | 613-944-6903 |
| Printing and Distribution                     | Mar-96 | Canada/Variou | DFAIT | 613-944-6903 |
| Sea Trade                                     | Mar-96 | Miami         | N.B.  | 506-453-3984 |
| Export Ready Seminars                         | Mar-96 | Canada/Variou | DFAIT | 613-944-6903 |
| Dateline Canada                               | Mar-96 | New York City | DFAIT | 212-596-1600 |
| Spotlight Canada Marketplaces                 | Mar-96 | Seattle       | DFAIT | 206-443-1777 |
| Spotlight Canada                              | Mar-96 | U.S./Variou   | DFAIT | 613-944-6903 |
| Spotlight Canada                              | Mar-96 | Minneapolis   | DFAIT | 612-333-4641 |
| Dateline Canada                               | Mar-96 | Los Angeles   | DFAIT | 213-687-7432 |
| Showcase Canada                               | Mar-96 | Los Angeles   | DFAIT | 213-687-7432 |
| Showcase Canada                               | Mar-96 | Dallas        | DFAIT | 214-922-9806 |
| National Trade Shows                          | Mar-96 | Dallas        | DFAIT | 214-922-9806 |
| AAL - Canada Products Marketplace             | Mar-96 | Dallas        | DFAIT | 214-922-9806 |
| Anniversaries/Festival Outdoor Events Seminar | Mar-96 | Miami         | DFAIT | 305-579-1600 |
| ISE   | Mar-96 | California    | N.B.  | 506-453-3984 |

For details on other activities, as they become available, please call:

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Europe: (613) 954-1900

Department of Foreign Affairs and International Trade

Tourism U.S.: (613) 944-7344



## Acronyms and Initialisms Used in The International Trade Business Plan

(This list does not include sector-specific references)

|        |   |           |  |
|--------|---|-----------|--|
| ACOA   | Atlantic Canada Opportunities Agency                  | IC        | Industry Canada  |
| AG Can | Agriculture and Agri-Food Canada                      | IDRC      | International Development Research Centre              |
| ASEAN  | Association of Southeast Asian Nations                | IFI       | international financial institution                    |
| BBS    | electronic bulletin board system                      | ISO       | International Standards Organization                   |
| BOSS   | Business Opportunities Sourcing System                | ITBP      | International Trade Business Plan                      |
| CCC    | Canadian Commercial Corporation                       | ITC       | International Trade Centre                             |
| CIDA   | Canadian International Development Agency             | MAPAQ     | Ministry of Agriculture, Fisheries and Food of Quebec  |
| CIS    | Commonwealth of Independent States                    | MDB       | multilateral development bank                          |
| CSA    | Canadian Standards Association                        | NAFTA     | North American Free Trade Agreement                    |
| DFAIT  | Department of Foreign Affairs and International Trade | NATO      | North Atlantic Treaty Organization                     |
| DFO    | Department of Fisheries and Oceans                    | NRC       | National Research Council                              |
| DND    | Department of National Defence                        | NRCan     | Natural Resources Canada                               |
| EC     | Environment Canada                                    | NRCan-CFS | Natural Resources Canada - Canadian Forest Service     |
| EDC    | Export Development Corporation                        | OECD      | Organization for Economic Co-operation and Development |
| EU     | European Union  | PEMD      | Program for Export Marketing Development               |
| FITT   | Forum for International Trade Training                | R&D       | research and development                               |
| FORDQ  | Federal Office of Regional Development - Quebec       | SMEs      | small- and medium-sized enterprises                    |
| FSU    | former Soviet Union                                   | UNEP      | United Nations Environmental Program                   |
| FTA    | Canada-U.S. Free Trade Agreement                      | WED       | Western Economic Diversification                       |
| GATT   | General Agreement on Tariffs and Trade                | WTO       | World Trade Organization                               |
| GDP    | gross domestic product                                |           |  |
| GNP    | gross national product                                |           |  |
| HRDC   | Human Resources Development Canada                    |           |  |



Government  
of Canada

Gouvernement  
du Canada

Canada