



# The Canadian resort traveller: Trends and implications for the resort industry<sup>1</sup>

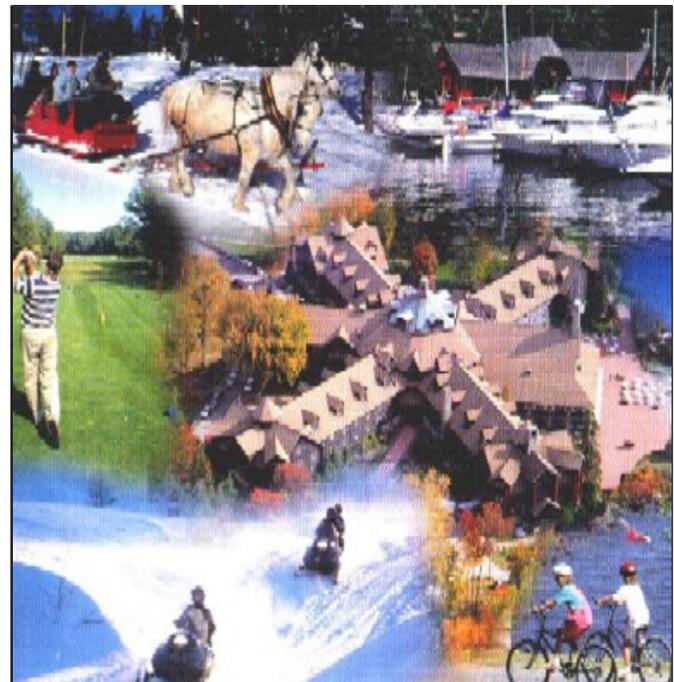
Julia Marcoux<sup>2</sup>

## Introduction

Globalization has led to expanding competition between and within various domestic and foreign tourism destinations. The “capability to anticipate change, the flexibility to accommodate change and the robustness to weather the storms” (Poon 1993:292) are key factors in achieving and maintaining a competitive advantage in today’s tourism market. Strong and well-managed tourism assets and the capacity to meet changing consumer values are crucial to success in the highly competitive tourism market.

Many North American resort destinations are undertaking major product and service revitalization efforts. They are also involved in community renewal projects and other significant private sector developments aimed at improving their responsiveness to emerging tourism market trends. Trends in visitor preferences and behaviour are two key considerations that underlie many of the planning decisions of resort managers (Pizam & Mansfeld 1999). By keeping up with changing patterns of visitor travel behaviour, resorts can respond more effectively to the marketplace. Such information can be used to build products, services and brands that position resort destinations positively in the minds of potential tourists.

The purpose of this study is to address the question: *What are the differences between Canada’s domestic resort market and the non-resort market?* This article, which identifies socio-demographic characteristics, travel behaviours and expenditures of Canada’s domestic resort travellers from the



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1. This research was conducted as part of the Statistics Canada and Canadian Tourism Commission’s Graduate Student Research Program.  
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1996, 1998 and 2000 survey results from Statistics Canada's Canadian Travel Survey, will provide insights into the resort marketplace.

### Definition of a resort

Statistics Canada defines resorts as "establishments that are primarily engaged in providing short-term lodging...featuring extensive indoor/outdoor leisure activities on the premises year round. Resorts are designed to accommodate travellers and provide full service units and guest rooms, typically in non-urban settings next to lakes, rivers or mountains, often with access to conference facilities". This definition excludes establishments that provide accommodation services and access to a particular recreational activity on a seasonal basis and establishments that integrate accommodation and recreational services in camp-like facilities. Therefore, for the purpose of this research a resort may be an establishment as large as Whistler in British Columbia or a smaller "mom and pop" establishment that offers the above products and services.

Additionally, throughout the report, the terms resort and destination are used interchangeably. The definition of a resort implies that attractions and activities are offered that allow for the visitors to spend their vacation or trip in one location – the resort. Therefore, the resort becomes the destination.

### Travel trends

Numerous researchers provide insights into the emerging trends associated with tourists travel preferences. Redekop (2000) suggests several trends that characterize the North American market. These include:

- reduction in length of main holidays,
- growth in additional breaks, especially "extended travel weekends",
- growth in short haul rather than long haul travel,
- growth in tailored and independently organized holidays, and a
- trend towards activity, cultural and special interest holidays.

Based on these and other trends, it is expected that tourists nowadays tend to be more experienced travellers with changing values, especially with respect

to the environment and different cultures.

Increased travel experience and the independent nature of tourists are generating demand for better quality and greater flexibility in the travel experience, with a particular emphasis on value for money. When choosing a vacation destination, Coopers and Lybrand (1996) describe the travel motivations of Canadians as being reflective of their desire for cleanliness, good weather and safety.

Poon (1993) further confirms the changing characteristics of tourists by identifying six key attributes that should be kept in mind by suppliers of tourism products and services. She highlights the level of experience, the values, lifestyles, population demographics of the tourists as well as their need for more flexibility and independence.

### Socio-demographic changes

Demographic changes are also occurring – the population is ageing, household size is decreasing and disposable income per household is growing. Baby boomers with high disposable incomes are looking for destinations that offer activities and attractions providing a unique experience. Therefore, this market segment will provide a steady source of revenue over the next decade as long as resorts offer products that meet these preferences.

### Changing values and preferences

Changing values are generating demand for more environmentally conscious and nature-oriented vacations (Poon 1993:114). As such, there is a high degree of interest in getaway vacations that offer ecotourism, cultural tourism and an ability to combine pleasure with business (WTOBC 1999:58). In addition, consumers are seeking unique and authentic experiences that add value to their quality of life (McDougall 1998:3). Consequently, tourism suppliers will find it advantageous to forge relationships with cultural and heritage programs or communities so as



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to meet the demands for “learning” type vacations.

Workers are experiencing increased work and time pressures. Shorter, more intense vacations are becoming even more important. However, the World Tourism Organization Business Council warns “Consumers will need to recognise travel products and services as making an essential contribution to their lifestyle, for which time must be found” (WTOBC 1999:11).

Destination resorts are going to be key vacation choices for the time pressed population (Redekop 2000). Resorts that offer “one-stop shopping” experiences will benefit the most as long as consumers receive maximum value from tourism purchases. In Canada, the trend towards more specialized destination-oriented resorts is not yet as evident as it is in the United States. Canada’s largest and highest profile destination resorts are Whistler, Banff/Lake Louise and Mont Tremblant. Although most smaller scale family-oriented resorts are found predominantly in Quebec and Ontario, they also exist across Canada (Redekop 2000).

### Domestic resort traveller market research

Redekop (2000) offers some insights into trends influencing the future characteristics of resort destinations. These include a growth in:

- the all-inclusive resort market,
- time-share demand,
- specialization in a specific market,
- demand for quality control over products and services, and a
- demand for combination of business/pleasure opportunities for travellers.

All-inclusive resorts are expected to grow in popularity. Some of this growth is due to the increasing concern by travellers for security. All-inclusive resorts offer a predictable, safe environment, often with a high level of service. The most profound change occurring in the all-inclusive market is product specialization in the resort market. Specialization enables the resort

to focus on a particular market and service it aggressively (Redekop 2000:42). Resorts that have no particular specialization may have a harder time competing. From a review of web literature, it is evident that resorts are specializing in particular outdoor activities such as golfing, fishing or downhill skiing, while at the same time offering services such as health spa treatments for the non-outdoors person. Niche marketing is occurring in the type of clientele the resort is attracting, often wealthy, middle-aged couples or families. Many high-end resorts are trying to attract clientele from the United States, Europe and Japan.

### Resort traveller expectations

People expect more out of their vacations and are more adventuresome. Therefore, resorts that offer cultural and ecotourism opportunities or aboriginal tourism, are expected to maintain market share and even grow. Ecotourism travellers place a much greater emphasis on experience than on accommodation, and protection of the environment features into the choices they make.

Changes in family structure and the ageing of baby boomers are affecting the tourism industry in a variety of ways. Past data from the Canadian Travel Survey demonstrate that family travel as a proportion of all travel has declined by 10.0% over the last 10 years (Shaienk 2000). Families are finding it difficult to take long vacations due to complex schedules. Therefore, quick “escapes” are becoming more prevalent, with visitors seeking relaxing and pleasurable experiences.

### Barriers to success

Successful resort destinations must be highly responsive and sensitive to consumer preferences, demonstrating a willingness to accommodate change. This means that many resorts have to undergo changes not only in their product offerings but also in the infrastructure of the resort itself. However, while many resorts may wish to meet the changing demands they may not

have the equity to do so. “The growth of the resort industry in the next decade will be very much dependent on the ability to inject new capital in developing the family-oriented resorts for a different and more discerning consumer” (Redekop 2000:41).

### Methodology

To provide insights into the characteristics and preferences of the Canadian domestic resort tourist, this research examines existing and relevant travel literature as well as market information drawn from Statistics Canada’s Canadian Travel Survey (CTS) for 1996, 1998 and 2000. The information used to address the research question is based on weighted person-trip data. The CTS defines a **domestic trip** as travel to a Canadian destination that is located at least 80 kilometres from home. The survey does not cover residents of the Yukon, Northwest Territories or Nunavut. The survey excludes also other segments of the Canadian population: children, institutionalized population, Indians living on reserves, etc.

A **resort trip** is defined as a trip where a resort was used as a type of accommodation. One or more nights on the trip may be spent in other type(s) of accommodation. In other words, not all trip nights may have been spent at the resort.

More specifically, the socio-demographic characteristics of the resort travellers as well as resort trip characteristics are examined.

To address issues of potential sampling error, only data with 30 or more respondents are reported in this paper. Additionally, data that should be interpreted with caution are identified with an asterisk. Data that has a coefficient of variation greater than 25.1% is not reported or used for analysis.

### Resort trip characteristics

The resort market is a small niche in the Canadian domestic travel market. In 2000, resorts were used as one type of accommodation in more than 806,000 domestic overnight trips, representing 1.0% of all overnight trips in Canada. However, it is a growing (up 17.6% from 1998) and lucrative market; with over 3.0 million nights spent in resorts, it accounts for almost 3.0% of all nights spent in commercial accommodation.

More than \$360 million were spent on resort trips, close to 2.0% of all expenditures made on domestic overnight trips.

Resort visitors tend to be well-educated couples who earn incomes of \$80,000 a year or over. About 46.0% are employed in the private sector compared to 17.4% in the public sector. Compared to non-resort travellers, resort tourists are more likely to be

between 55 and 64 years of age and to have a university education.

Family resort vacations are growing in popularity, in contrast to the decline in family travel noted in the overall travel market during the eighties and the nineties. The proportion of trips to resorts which include children went up from 28.0% in 1996 to 34.2% in 2000, with the proportion of trips involving two

children especially going up by 10 percentage points. The proportion of trips involving a travel party size of four has increased 2.5 percentage points between 1996 and 2000. When looking at all types of accommodation and the composition of the travel party, resort is the type of commercial accommodation that shows the highest proportion of adults travelling with children, after camping and commercial cottage.

The proportion of three adults from a single household going together on a resort trip increased 5 percentage points from 1996 to 2000. This may suggest that, as the children of baby boomers get older, they are more likely to take a resort vacation with their parents. The growth of ageing baby boomer resort travellers may drive the growth in the family market segment for the next decade.

In contrast with the trend in the overall market, the length of stay of tourists in resorts has increased from 3.2 nights in 1996 to 3.8 nights in 2000. The average duration of trips involving a resort stay in 2000 is much longer (6.1 nights) than the average duration of all domestic overnight trips in Canada, which is 3.3 nights. In 2000, the proportion of travellers staying for two nights at a resort was 28.2%; 25.6% stayed for three nights, compared to 12.8% for those staying only for one night.

The majority (78.1%) of resort visitors travel for reasons of enjoyment and relaxation (pleasure), a very high percentage compared to the proportion of non-resort overnight pleasure travellers (41.8%). In contrast, very few resort travellers stated that the purpose of their trip was to visit friends and relatives (9.0%) compared to non-resort tourists (38.0%). However, that proportion has increased by 5.5 percentage points from 1996 to 2000. These findings support the concept of resort travellers primarily seeking a "getaway" vacation. The proportion of travel for business reasons decreased slightly over the years for resort tourists, down 2 percentage points between 1996 and 2000.

**Table 1**  
**Socio-demographic characteristics of domestic resort tourists, 2000**

Characteristics	Resort	Non-resort
	%	
<b>Age group</b>		
Under 15 years	17.7	16.0
15-19 years	8.2	6.3
20-24	4.1	8.0
25-34	12.4	16.8
35-44	22.1	19.0
45-54	15.8	16.6
55-64	15.7	9.7
65-69	1.7	3.4
70 years and over	2.3	4.2
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Sex</b>		
Not stated	17.7	16.0
Male	43.7	42.9
Female	38.6	41.1
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Class of worker</b>		
Not stated	13.1	17.0
Paid worker – Private sector	46.0	43.8
Paid worker – Public sector	17.4	16.5
Self-employed (unincorporated business)	5.7	6.7
Not in labour force/permanently unable to work	17.7	16.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Education level</b>		
Not stated	17.7	16.0
0-8 years	2.0	3.2
Some secondary education	8.6	10.2
Graduate from high school	12.1	14.7
Some postsecondary	6.8	8.8
Postsecondary certificate/diploma including trades	26.9	26.5
University degree	25.9	20.6
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Household income</b>		
Not stated	26.1	23.6
Less than \$20,000	5.9	7.3
\$20,000-\$39,999	8.5	17.8
\$40,000-\$59,999	16.0	17.7
\$60,000-\$79,999	15.4	14.4
\$80,000 and over	28.0	19.2
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Marital status</b>		
Married or common-law	58.6	54.4
Single, never married (including children)	35.9	37.8
Widowed/separated or divorced	5.5	7.8
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Table 2**  
**Family characteristics of domestic resort tourists, 2000**

Characteristics	Resort	Non-resort
	%	
<b>Number of adults in household</b>		
1	8.6	12.6
2	64.8	56.8
3 or more	26.7	30.6
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Number of children in household</b>		
0	52.1	56.5
1	12.6	16.7
2	24.8	18.3
3 or more	10.5	8.5
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Number of children in household who went on trip</b>		
0	65.8	67.1
1	5.6	12.4
2	21.0	14.1
3 or more	7.5	6.4
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

**Table 3**  
**Characteristics of domestic resort trips, 2000**

Characteristics	Resort	Non-resort
	%	
<b>Survey quarter</b>		
1st quarter (January-March)	34.1	16.6
2nd quarter (April-June)	14.6	23.7
3rd quarter (July-September)	41.3	39.7
4th quarter (October-December)	10.0	20.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Month</b>		
January	21.1	5.8
February	10.6	5.4
March	2.5	5.5
April	5.6	6.4
May	4.0	8.6
June	5.0	8.7
July	11.6	14.5
August	19.6	15.4
September	10.2	9.8
October	3.6	6.6
November	2.7	5.8
December	3.7	7.5
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Trip purpose</b>		
Visit friends or relatives	9.0	38.0
Pleasure	78.1	41.8
Personal	3.0	8.3
Business/convention	9.9	11.8
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Main transportation<sup>1</sup></b>		
Auto	90.0	87.7
Air	4.1	7.3
Bus	2.3	3.0
Rail	0.6	1.0
Boat	1.6	0.5
Other	1.4	0.4
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

1. Type of transportation used for longest distance.

The majority of resort tourists are independent travellers who prefer to organize their own activities rather than have them planned and packaged. However, the use of travel packages in 2000 is significant with 30.6% of resort tourists investing in packages compared to only 3.0% for non-resort tourists.

For resort tourists, the main products included in a travel package were accommodation, meals and recreational activities. In contrast, non-resort tourists were more inclined to include transportation and car rental services in their packages. The fact that resort tourists use predominantly their own vehicles for their trips is reflective of their desire for independence and the manageable driving distance to a resort.

In 1996 and 1998, the most popular months for resort travel were July and August. In 2000, resort winter/spring trips gained in popularity, growing 17.5% since 1996, within the Canadian domestic market. Not only did the summer months of July and August 2000 receive similar shares of the resort market as in other years, but the month of January claimed the largest share (21.1%).

Ontario, Quebec and British Columbia account for the largest shares of visitors to resorts. Some provinces, such as Prince Edward Island, do not have many resorts and therefore are not able to capture a significant share of the market. Interestingly, both Quebec and Ontario lose more resort visitors to other provinces than they gain, whereas British Columbia has a larger influx of visitors from other provinces. Alberta also loses more resort tourists than it gains, as many Albertans go to British Columbia for their resort vacations.

In 2000, the Western provinces saw the greatest growth in visitors to resorts (3.7%) whereas the central provinces (Ontario and Quebec) had the greatest decline (-4.1%).

Expenditures by resort tourists remain an insignificant proportion of total expenditures by all domestic overnight travel consumers, representing only 1.8% in 2000. However, average expenditures are significantly higher for

**Table 4**  
**Characteristics of travel packages purchased by domestic resort tourists, 2000**

Characteristics	Resort	Non-resort
	%	
<b>Number of travel packages</b>		
0	69.5	97.0
1	27.3	2.7
2	3.3	0.3
<b>Components of travel packages</b>		
Car rental	0.9	4.3
Transportation (air, bus, train or boat)	7.8	32.7
Meals	86.0	68.5
Accommodation	99.6	91.3
Recreation or entertainment	50.2	54.9
Other	6.2	9.5

**Table 5**  
**Province of origin and destination of domestic resort trips, 2000**

	Resort	Non-resort
	%	
<b>Province of origin</b>		
Newfoundland and Labrador	0.4	2.1
Prince Edward Island	0.1	0.4
Nova Scotia	2.4	3.7
New Brunswick	1.2	2.6
Quebec	19.7	22.6
Ontario	47.0	35.2
Manitoba	4.5	4.3
Saskatchewan	2.5	4.8
Alberta	9.7	13.2
British Columbia	12.6	11.1
<b>Total</b>	<b>100.0</b>	<b>100.0</b>
<b>Province of destination</b>		
Newfoundland and Labrador	0.3	2.2
Prince Edward Island	1.0	0.8
Nova Scotia	2.0	3.9
New Brunswick	1.0	2.6
Quebec	23.9	22.6
Ontario	38.7	34.3
Manitoba	3.6	4.0
Saskatchewan	3.2	4.9
Alberta	6.9	12.1
British Columbia	19.1	12.5
Yukon	0.1	0.0
Northwest Territories	0.1	0.1
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

resort tourists than for other tourists. In 2000, resort tourists spent \$447 per trip compared to \$245 for the non-resort overnight traveller. Total resort travel expenditures increased between 1996 and 2000, which seems to be in line with the slight increase in duration of resort stays.

### Resort tourist trip activity patterns

Regardless of the trip purpose, while on a resort trip, tourists pursue a wide range of activities. Participation is most pronounced in activities such as sightseeing, shopping, visiting friends and relatives

and pursuing outdoor activities such as skiing, golfing, hiking and swimming. Resort tourists are more inclined to participate in a variety of activities compared to their non-resort tourist counterparts. Specifically, resort tourists are more apt to pursue outdoor activities, to go sightseeing and to visit a national or provincial park than their non-resort counterparts. Table 6 demonstrates the preference differences between resort and non-resort tourists.

A higher percentage of resort visitors than non-resort visitors sought cultural and educational experiences from museums/galleries, visits to national and provincial parks and historic sites in 2000.

### What does this mean for the resort industry?

The size of the resort market has grown significantly between 1998 and 2000, going from 687,000 in 1998 to 806,000 in 2000, an increase of 17.4%. Although resorts account for only 1.0% of all the overnight domestic trips, 1.8% of all nights and expenditures generated by domestic overnight tourists come from resort travellers.

From an analysis of the Canadian Travel Survey data, some of their key characteristics can be highlighted. Resort travellers tend to be well-educated couples with a fairly high income. A high proportion of them travel with their kids. Although most of their trips occur in the summer, the first quarter, especially in January, is very popular. The vast majority travel for pleasure and the average duration of their trips is longer than that of non-resort tourists, resulting in higher spending on their trips. Their participation rate in sports and outdoor activities is almost twice the rate of non-resort tourists and their usage of packages is significant.

These findings offer resorts insight into their consumers' expectations and preferences and can help them to target their market more efficiently.

**Table 6**  
**Activity participation of Canadian resort tourists in Canada, 2000<sup>1</sup>**

Activity	Resort	Non-resort
	%	
Visiting relatives	26.9	55.7
Visiting friends	23.5	48.7
Shopping	34.1	33.8
Sightseeing	44.0	25.9
Attend cultural events (plays, concerts)	6.5	4.3
Attend aboriginal/native cultural event	3.0	0.9
Visit a museum or art gallery	8.7	6.3
Visit a theme park	9.1	3.8
Visit a national or provincial park	24.3	9.9
Visit an historic site	11.8	6.8
Went to a bar or a nightclub	15.5	12.6
Took a cruise or boat trip	7.5	4.1
Participate in sports/outdoor activity	72.2	37.5
Swimming	21.6	10.8
Other water-based activities	10.3	6.1
Golfing	10.4	3.6
Cross-country skiing	9.2	0.7
Downhill skiing	14.3	2.0
Walking or hiking	36.0	17.0
Other sports or outdoor activities	14.7	10.3

1. Activities where the participation rate of resort and non-resort tourists is less than 2 percentage points apart are not shown above. These include: attend a festival, fair or exhibition, attend sports events, visit a zoo or natural exhibit, went to a casino, hunting, fishing, bird or wildlife viewing, snowmobiling or cycling.

World Tourism Organization Business Council. 1999. *Changes in Leisure Time: The impact on Tourism*. Madrid. World Tourism Organization Business Council.



## Characteristics of international travellers

### Third quarter 2003 (preliminary)

Overnight travel by Canadian residents to overseas countries reached a new peak in the third quarter. Over 1.2 million Canadian residents took overnight trips between July and September 2003, up 6.0% from the third quarter of 2002.

The impact of the war in Iraq and the SARS crisis continued to be felt over the summer of 2003, as the number of foreign visitors continued to decline. The number of overnight trips from overseas countries plunged 20.2% to less than 1.3 million in the third quarter, while overnight trips from American residents dropped 12.5% to less than 6.1 million. These are the lowest levels observed since 1987 in the case of the overseas countries and 1997 in the case of the United States.

Canadian residents took 4.2 million overnight trips to the United States in the third quarter, down 3.7% from the third quarter of 2002.

### Car travel from the United States more affected than plane travel

Overnight car travel from the United States dropped 15.2% in the third quarter to under 4.0 million. This was the

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smallest number of American tourists by car in the third quarter since 1997. Over half of the overnight visits by car by American residents are in Ontario.

The recovery in air travel from the United States that started in the third quarter of 2002 did not last. In fact, the 8.7% decline registered in the third quarter of 2003 was the third consecutive quarterly decrease in this type of travel to Canada.

For the second consecutive quarter, trips from residents of the eastern regions of the United States dropped more than those from residents of other United States regions. The South-Atlantic, Mid-Atlantic and the North East Central regions all recorded drops of over 15.0% in the number of overnight trips to Canada.

The border states of Michigan and New York registered significant declines in the third quarter. Combined, these states provided to Ontario 37.4% of its American visitors. California, Washington and Ohio, all among the top five American markets to Canada, recorded substantial drops in overnight travel to Canada compared with the third quarter of 2002. These declines may be related to fears associated with SARS.

In the third quarter, pleasure travel (4.1 million trips) accounted for over two-thirds of all American overnight travel to Canada and recorded the largest drop (-15.5%) from the third quarter of 2002. Americans undertook fewer overnight business trips to Canada (-13.1%) and visited their friends and relatives less often (-7.4%) than they did in the third quarter of 2002.

The number of American overnight visits to Canadian provinces and territories fell 13.4% from the third quarter of 2002. All provinces saw fewer American travellers. Ontario and Quebec led the decline.

American spending on overnight trips in Canada retreated 14.8% to \$3.3 billion in the third quarter of 2003.

## Travel from overseas: The nose dive continues

The setback in overnight trips from overseas that started just before the events of September 11, 2001, was still in effect in the third quarter of 2003 with a 20.2% drop. This was the result of a 17.5% decrease in direct trips to Canada and a 25.6% decline in trips from overseas countries via the United States.

The drop in overseas overnight travel is mainly attributable to the declines in Asian visitors. All top 12 overseas markets recorded fewer overnight trips to Canada in the third quarter, the largest

losses coming from Japan, Mexico, Taiwan, Hong Kong and China.

Pleasure trips, which represented almost half of the overnight trips, were down 26.8%. Losses were not as severe for business trips and for visits to friends and relatives.

Spending by residents of overseas countries was down by more than 25.0% to \$1.6 billion in the third quarter of 2003.

## Record number of Canadian travel to overseas

Canadian residents took a record 1.2 million overnight trips to overseas

### Top 12 states of origin for U.S. tourists to Canada, third quarter, 2002 and 2003

	Overnight trips		
	Third quarter 2002	Third quarter 2003	Third quarter 2002 to third quarter 2003
	'000		% change
New York	876	753	-14.0
Michigan	739	606	-18.0
Washington	585	533	-8.9
California	392	356	-9.2
Ohio	383	318	-16.9
Massachusetts	325	272	-16.4
Illinois	297	260	-12.4
Pennsylvania	292	238	-18.5
Minnesota	223	224	0.4
Florida	226	186	-17.6
Texas	189	170	-10.1
New Jersey	231	151	-34.4

### Top 12 overseas markets to Canada, third quarter, 2002 and 2003

	Overnight trips		
	Third quarter 2002	Third quarter 2003	Third quarter 2002 to third quarter 2003
	'000		% change
United Kingdom	277	257	-7.4
Germany	138	122	-11.5
France	143	115	-19.6
Japan	171	79	-53.4
South Korea	54	54	-1.1
Mexico	74	50	-32.0
Netherlands	49	47	-3.5
Australia	52	44	-14.9
Switzerland	42	39	-6.4
Hong Kong	43	34	-20.9
Taiwan	38	28	-24.1
China	35	28	-20.1

countries in the third quarter. Overseas travel by Canadians is the only flow showing signs of recovery from the events of September 11, 2001.

Canadians were more likely to travel more in all overseas regions of the world except for Asia and South America. The number of overnight Canadian visits to the Caribbean advanced almost 50.0%. Europe was still the preferred destination of Canadian tourists, with 8 of the top 10 countries visited. Almost 1.3 million overnight visits were made in Europe, up 5.0% from the third quarter of 2002. However, the number of overnight visits by Canadian residents to Asia, especially to China (-19.9%) and Hong Kong (-28.8%), decreased.

In the third quarter of 2003, Canadian residents spent over \$2.0 billion on their overseas trips, up 5.0%.

### Canadian residents travel to the United States down even though the dollar is up

The decrease of 3.7% in the number of overnight trips by Canadian residents to the United States in the third quarter was the 11th drop in 12 quarters, and it occurred despite a 13.3% increase in the value of the Canadian dollar relative to the United States dollar between the third quarters of 2002 and 2003.

Together, the three border states of New York, Washington and Michigan hosted a third of Canadian visitors to the United States and they all recorded

declines in overnight visits. New York, despite a 7.4% drop in overnight visits, is still the most popular state for Canadian residents and the state where they spent the most nights and the most money. However, Hawaii and southern states like California, Florida, Texas and Arizona registered the longest stays (over a week), reaching almost 15 nights for Texas. Amongst the 15 most popular states, Nevada had the highest average spending per visitor/night, \$150, almost double the average spending by Canadians in the States.

Canadian residents spent over \$1.8 billion on overnight trips to the United States in the third quarter, down 4.7% from the third quarter of 2002.

### Selected U.S. states visited by Canadian tourists during the third quarter, 2003

	Visits	Spending	Nights	Length of visit	Spending/visit	Spending/night
	'000	\$ millions	'000		\$	\$
New York	871	195	2,643	3.0	224	74
Washington	573	102	1,719	3.0	178	59
Michigan	381	79	1,093	2.9	208	73
Maine	358	80	1,184	3.3	224	68
California	239	187	1,914	8.0	784	98
Florida	157	140	1,495	9.5	894	94
New Hampshire	142	24	385	2.7	170	63
Nevada	140	103	678	4.8	736	152
North Dakota	134	23	255	1.9	171	89
Texas	56	60	831	14.7	1,067	72
Arizona	44	36	367	8.3	814	99
Hawaii	44	70	560	12.7	1,579	125

### Overnight travel between Canada and other countries

	Person-trips				Expenditures			
	Second quarter 2003 <sup>r</sup>	Third quarter 2002 <sup>r</sup>	Third quarter 2003 <sup>p</sup>	Third quarter 2002 to third quarter 2003	Second quarter 2003 <sup>r</sup>	Third quarter 2002 <sup>r</sup>	Third quarter 2003 <sup>p</sup>	Third quarter 2002 to fourth quarter 2003
	'000	'000	'000	% change	\$ millions	\$ millions	\$ millions	% change
<b>Canadian trips abroad</b>	<b>4,025</b>	<b>5,506</b>	<b>5,414</b>	<b>-1.7</b>	<b>3,759</b>	<b>3,856</b>	<b>3,863</b>	<b>0.2</b>
To the United States	2,995	4,341	4,180	-3.7	2,173	1,906	1,815	-4.8
To other countries	1,030	1,165	1,234	6.0	1,586	1,950	2,048	5.0
<b>Travel to Canada</b>	<b>4,170</b>	<b>8,486</b>	<b>7,302</b>	<b>-13.9</b>	<b>2,760</b>	<b>6,115</b>	<b>4,924</b>	<b>-19.5</b>
From the United States	3,418	6,920	6,052	-12.5	1,714	3,856	3,287	-14.8
From other countries	752	1,566	1,250	-20.2	1,046	2,259	1,637	-27.5

<sup>r</sup> revised

<sup>p</sup> preliminary



**Note to readers**

This International travel account analysis is based on preliminary quarterly data, seasonally adjusted unless otherwise stated. Amounts are in Canadian dollars and are not adjusted for inflation.

**Receipts** represent spending by foreigners travelling in Canada, including education and medical spending.

**Payments** represent spending by Canadians travelling abroad, including education and medical spending.

**Overseas countries** are countries other than the United States.

**International travel account  
2003 and fourth quarter 2003  
(preliminary)**

Canada's annual international travel deficit reached its highest level in 10 years. The deficit – the difference between what Canadians spend abroad and what foreigners spend in Canada – more than doubled in 2003. It increased from \$1.9 billion in 2002 to an estimated \$4.3 billion in 2003, the biggest since 1993.

This surge in the annual deficit was the result of a sharp decline in spending by non-resident travellers in Canada and a slight increase in travel spending abroad by Canadian residents.

Foreign travellers injected \$14.6 billion in the Canadian economy in 2003, 12.8% less than in 2002 and the first decrease in more than 15 years. Meanwhile, Canadian residents spent a record \$18.9 billion on travel abroad, up 1.7% from 2002. This was the ninth consecutive annual increase.

The war in Iraq and the SARS crisis may have been the most likely reasons foreign travellers spent less in Canada in 2003, while the stronger Canadian dollar may have contributed to the increase in Canadian travel spending abroad.

Non-residents made 38.9 million same-day and overnight trips to Canada in 2003, down 13.3% from 2002. Travel outside the country remained unchanged at 39.2 million trips.

This was the first year since 1997 that more Canadian residents travelled abroad than non-residents visited Canada.

**Annual travel deficit with the United States almost triples**

Canada's travel deficit with the United States rose considerably in 2003, as spending by American visitors in Canada dropped substantially more than Canadian travel spending in the United States.

Americans spent \$9.0 billion in Canada in 2003, down 12.3% from the record high of \$10.3 billion set in 2002. At the same time, Canadian residents spent \$10.9 billion in the United States, 1.1% less than in 2002.

As a result, the travel deficit with the United States jumped from \$681 million in 2002 to an estimated \$1,828 million in 2003, the first increase and the highest level since 2000.

During the period, the value of the Canadian dollar increased 12.0% on average against its American counterpart.

Americans made 35.5 million trips to Canada in 2003, down 13.1% from 2002. Canadian travel to the United States fell 1.2% to 34.2 million trips in 2003.

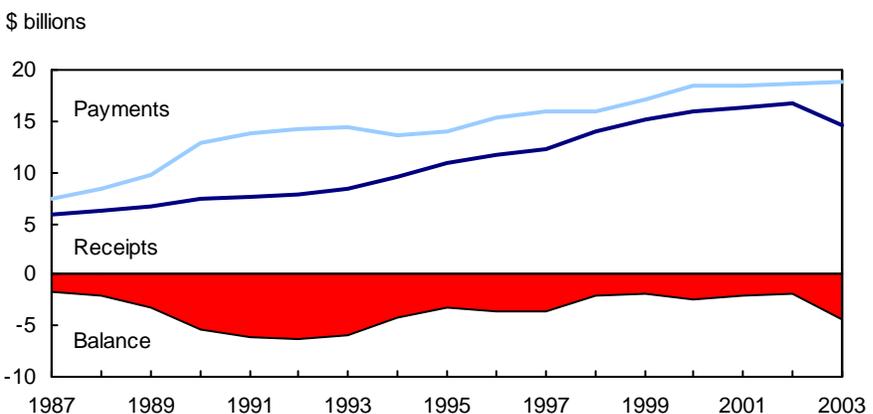
**Annual travel deficit with overseas countries jumps to a new high**

Spending by overseas visitors to Canada decreased 13.6% to \$5.5 billion in 2003, the third consecutive annual decline. These visitors took 3.4 million trips to Canada, down 15.6% from 2002.

Canadian residents made a record 5.1 million trips to overseas destinations in 2003, up 8.4% from 2002. Their spending on those trips rose 5.6% to \$8.0 billion, the highest level ever recorded.

Consequently, Canada's travel deficit with countries other than the United States increased to an estimated \$2.5 billion in 2003, breaking the previous record of \$1.2 billion set in

**Canada's annual international travel deficit highest since 1993**



2002. The deficit with overseas countries has increased considerably since 2000, when it stood at only \$396 million.

On average, the Canadian dollar fell against the euro (-6.3%) in 2003, but increased its value against several other overseas currencies, including the British pound (+3.0%) and the yen (+3.9%).

### Travel deficit increased in the fourth quarter

Canada's travel deficit with the rest of the world increased to an estimated \$1.4 billion in the fourth quarter, after hitting \$1.2 billion in the third quarter. This was the fourth quarterly increase of the deficit in 2003.

This result came mostly from an increase in spending by Canadian travellers outside the country, which surpassed the growth recorded in travel spending by foreigners in Canada.

Canadian travellers spent \$5.1 billion and made 10.4 million trips outside the country, up 8.3% and 5.5% respectively from the third quarter. Meanwhile, foreign residents spent \$3.7 billion in Canada in the fourth quarter, 6.6% more than in the third. They took 10.1 million trips to this country, up 9.0% from the third quarter.

### Slight increase of the travel deficit with the United States in the fourth quarter

Canada's travel deficit with the United States posted a slight increase in the fourth quarter, rising from \$517 million in the third quarter to an estimated \$524 million in the fourth.

Canadian spending in the United States increased 5.6% to \$2.8 billion in the fourth quarter, the result of a 4.4% growth in travel to south of the border. During the same period, Americans made 9.2 million trips to Canada, up

9.3% from the third quarter. Their spending on those trips reached \$2.3 billion, up 6.6% from the third quarter.

### Canadian spending pushed up the travel deficit with overseas countries in the fourth quarter

Overseas residents, who took 871,000 trips (+5.7%) to Canada in the fourth quarter, spent \$1.4 billion in Canadian destinations, up 6.7% from the third quarter. However, this increase was surpassed by a 12.0% jump in overseas spending by Canadians to \$2.2 billion. These expenses were made on a record 1.4 million trips, a 13.0% increase from the third quarter. As a result, the travel deficit between Canada and countries other than the United States went up from \$713 million in the third quarter to an estimated \$867 million in the fourth quarter.

## International travel account receipts and payments

	Seasonally adjusted <sup>1</sup>						Third quarter 2003 to fourth quarter 2003	2002 to 2003
	First quarter 2003 <sup>r</sup>	Second quarter 2003 <sup>r</sup>	Third quarter 2003 <sup>r</sup>	Fourth quarter 2003 <sup>p</sup>	2002 <sup>r</sup>	2003 <sup>p</sup>		
	\$ millions						% change	
<b>United States</b>								
Receipts	2,400	2,162	2,171	2,314	10,310	9,046	6.6	-12.3
Payments	2,715	2,635	2,688	2,837	10,991	10,875	5.6	-1.1
Balance	-315	-473	-517	-524	-681	-1,828		
<b>All other countries</b>								
Receipts	1,619	1,300	1,272	1,357	6,421	5,547	6.7	-13.6
Payments	2,074	1,736	1,985	2,224	7,594	8,019	12.0	5.6
Balance	-455	-436	-713	-867	-1,173	-2,471		
<b>Total</b>								
Receipts	4,019	3,461	3,443	3,671	16,731	14,594	6.6	-12.8
Payments	4,788	4,371	4,673	5,062	18,585	18,893	8.3	1.7
Balance	-769	-909	-1,231	-1,391	-1,853	-4,300		

<sup>r</sup> revised

<sup>p</sup> preliminary

1. Data may not add to totals due to rounding.



## Domestic travel (Third quarter 2003)

Travel in Canada by Canadian residents decreased 14.8% to 55.8 million trips in the third quarter of 2003 compared with the third quarter of 2002, which was the strongest third quarter of the last five years. The magnitude of the decrease in domestic travel was relatively similar to the one recorded in international travel to Canada (-13.3%), during the same period.

Domestic trips accounted for 79.7% of all trips made in Canada in the third quarter of 2003, a share that is similar to the one obtained in the third quarter of 2002. Of those 55.8 million trips in the third quarter of 2003, 24.5 million were same-day trips and 31.3 million were overnight trips. Both types of trips registered decreases from the same quarter a year earlier, 15.3% for same day and 14.5% for overnight.

Pleasure trips, which represented more than 50.0% of all domestic trips taken in the third quarter 2003, decreased 16.4% from a year earlier, to 28.5 million. Trips related to business and convention declined 18.4% to 4.0 million during the same period. Decreases in these two types of trips affected the number of nights spent in commercial accommodation during the summer.

Overnight stays in commercial accommodation totalled 56.1 million nights in the third quarter of 2003, down 11.2% from a year earlier. Similarly, nights spent in private accommodation such as the home of friends or relatives and cottages, decreased (-11.6%) to 68.5 million.

September is the month of the third quarter that recorded the smallest year-over-year decrease in domestic travel, 9.6% compared with 16.3% in July and 16.8% in August.

Spending on domestic travel, which reached \$9.6 billion in the third quarter, fell 11.4% compared with the third quarter of 2002. When taking inflation into account, spending actually decreased by 11.7% to \$8.6 billion (in constant 1997 dollars).

The drop in trip volumes, together with lower prices for travel goods and services, contributed to the decline of domestic travel spending in the third quarter of 2003. The travel price index

for third quarter suffered a year-over-year decrease of 1.0%, mostly the result of a drop in prices for accommodation.

Expenditures on recreation, entertainment and other goods and services (-14.7%) decreased the most in the third quarter. Expenditures on other categories, such as transportation, accommodation and food and beverage, were all down over 10.0%.

Average spending per overnight trip was \$259 overall, compared with \$748 when travelling for business reasons or to attend a convention. Travel related to business or convention accounted for 16.0% of all overnight travel expenditures and 7.0% of all overnight trips.

### Canadian travel within Canada

	Third quarter 2002	Third quarter 2003	Third quarter 2002 to third quarter 2003
trips (millions)			
<b>Total trips</b>	<b>65.5</b>	<b>55.8</b>	<b>-14.8</b>
Intraprovincial trips	57.0	48.4	-15.2
Interprovincial trips	8.5	7.4	-12.5
Same-day trips	28.9	24.5	-15.3
Overnight trips	36.6	31.3	-14.5
Visiting friends or relatives	19.9	17.2	-13.1
Pleasure	34.0	28.5	-16.4
Personal <sup>1</sup>	6.7	6.1	-9.1
Business and convention	4.9	4.0	-18.4
nights (millions)			
<b>Total nights</b>	<b>140.7</b>	<b>124.6</b>	<b>-11.4</b>
Non-commercial nights	77.5	68.5	-11.6
Commercial nights	63.2	56.1	-11.2
expenditures (\$ millions)			
<b>Total expenditures</b>	<b>10,821</b>	<b>9,590</b>	<b>-11.4</b>
Transportation	3,769	3,369	-10.6
Accommodation	1,944	1,740	-10.5
Food and beverage	2,755	2,473	-10.2
Recreation and entertainment	902	773	-14.3
Other <sup>2</sup>	1,451	1,235	-14.9
expenditures (\$ millions, 1997)			
<b>Total expenditures</b>	<b>9,690</b>	<b>8,555</b>	<b>-11.7</b>
Transportation	3,350	2,847	-15.0
Accommodation	1,801	1,796	-0.3
Food and beverage	2,432	2,134	-12.3
Recreation and entertainment	808	684	-15.3
Other <sup>2</sup>	1,299	1,094	-15.8

1. Including not stated trips.

2. Clothing and other purchases.

**Note:** Domestic travel is defined as any trip of 80 kilometres or more one way, taken by a Canadian resident to a Canadian destination. Data for trips by Canadian residents abroad and by foreigners to Canada come from the International Travel Survey.



## Travel Price Index Fourth quarter, 2003

### The TPI remained virtually unchanged for the fourth quarter 2003 compared with the same quarter in 2002

In the fourth quarter of 2003, the Travel Price Index reached 136.1 compared to 136.3 for the fourth quarter of 2002. This marginal decrease (-0.1%) in the prices of goods and services included in the TPI basket follows a 5.1% growth recorded during the fourth quarter of 2002.

The TPI decline in the fourth quarter of 2003 was mainly due to an important drop in traveller accommodation costs, which fell 9.0% compared with the same quarter of 2002. Decreases in costs recorded for clothing (-1.5%), inter-city transportation (-0.6%), rental of automotive vehicles (-3.0%) and footwear (-0.6%) also contributed to the decline of the Travel Price Index. These expenditures accounted for 43.8% of all trip expenditures in the fourth quarter 2003.

Seven out of twelve components of the TPI rose, preventing the TPI from taking a larger drop. The costs for operating automotive vehicles, which represented 19.1% of all travel expenditures, increased by 4.0%, mainly as a result of the rise in automotive vehicle insurance premiums. The other price

components showing an upwards movement were: local transportation (+5.1%), spectator entertainment (+4.2%), served alcoholic beverage (+2.9%), food purchased from restaurants (+2.6%), and finally food (+1.6%) and alcoholic beverages (+1.8%) bought in stores.

By comparison, the Consumer Price Index advanced 1.7% in the fourth quarter compared with the same quarter of 2002. The difference between the CPI and the TPI in the fourth quarter has remained stable since 1999.

### TPI for fourth quarter 2003 down 3.1% from previous quarter

The drop in the traveller accommodation prices (-15.6%) was the main contributing factor to the 3.1% decline of the TPI from the third to the fourth quarter of 2003. The index for this component has never been so low since the first quarter of 1997, at 105.3. The other

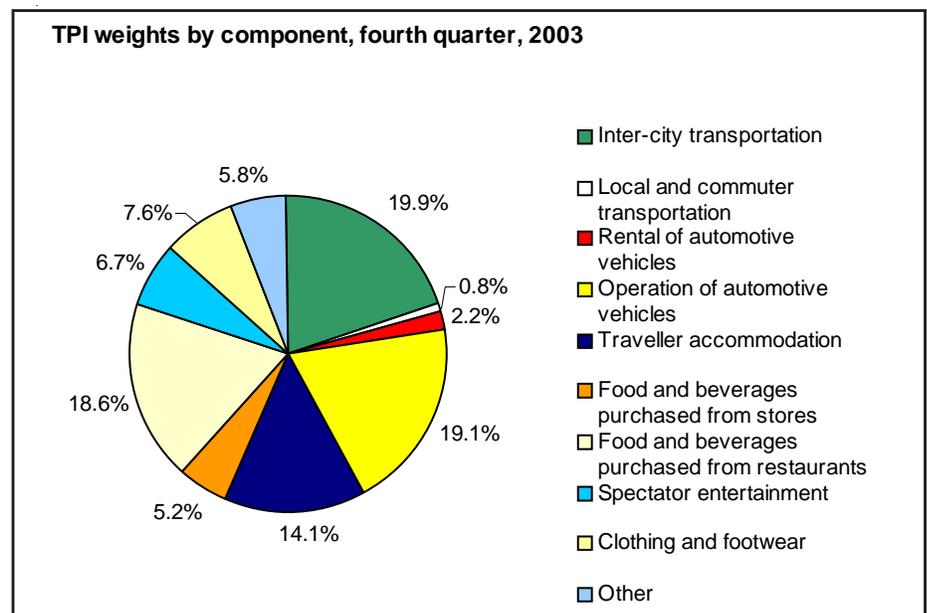
components that registered a drop in prices were inter-city transportation (-3.4%) followed by the operation of automotive vehicles (-2.1%). These three components totalled 53.1% of all expenditures made in the last quarter of 2003.

Tourism has been affected by a number of factors during 2003, including a higher Canadian dollar, the world's instability and the outbreak of SARS (severe acute respiratory syndrome).

Even if eight components of the TPI recorded price increases during the fourth quarter of 2003, these were not enough to prevent the TPI from losing ground compared to the third quarter. The components that recorded the strongest price increases were spectator entertainment (+3.6%) followed by footwear (+2.7%) and clothing (+1.0%).

The cost of all goods and services in the Consumer Price Index recorded a marginal increase of 0.1% from the third to the fourth quarter of 2003.

TPI weights by component, fourth quarter, 2003



**Selected components of the Travel Price Index (TPI)**

(not seasonally adjusted, 1992 = 100)

Components of the TPI	Fourth quarter	Third quarter	Fourth quarter	Third quarter	Fourth quarter
	2003	2003	2002	2003 to fourth quarter 2003	2002 to fourth quarter 2003
	% change				
Inter-city transportation	188.6	195.3	189.7	-3.4	-0.6
Local and commuter transportation	144.4	143.6	137.4	0.6	5.1
Rental of automotive vehicles	125.0	123.9	128.8	0.9	-3.0
Operation of automotive vehicles	146.4	149.5	140.8	-2.1	4.0
Traveller accommodation	105.3	124.8	115.7	-15.6	-9.0
Food purchased from stores	121.0	121.1	119.1	-0.1	1.6
Food purchased from restaurants	126.2	125.4	123.0	0.6	2.6
Served alcoholic beverages	123.3	122.4	119.8	0.7	2.9
Alcoholic beverages purchased from stores	122.0	121.7	119.8	0.2	1.8
Spectator entertainment	162.0	156.3	155.5	3.6	4.2
Clothing	101.8	100.8	103.3	1.0	-1.5
Footwear	104.8	102.0	105.4	2.7	-0.6
<b>Travel Price Index (TPI)</b>	<b>136.1</b>	<b>140.5</b>	<b>136.3</b>	<b>-3.1</b>	<b>-0.1</b>
<b>Consumer Price Index (CPI)</b>	<b>122.6</b>	<b>122.5</b>	<b>120.6</b>	<b>0.1</b>	<b>1.7</b>

*Sources: The Consumer Price Index, Catalogue no. 62-001-XPB and the Tourism Statistics Program.*



		Fourth quarter			Year		
		2002	2003	Percentage change	2002	2003	Percentage change
<b>VISITORS TO CANADA ('000)</b>		<b>CANSIM II</b>					
From United States	V125185	8,274	7,323	-11.5	40,878	35,509	-13.1
One or more nights visits	V129509	2,798	2,624	-6.2	16,167	14,196	-12.2
- By auto	V125188+V125189	1,797	1,657	-7.8	10,607	9,120	-14.0
From overseas	V125217	754	668	-11.4	4,018	3,393	-15.6
One or more nights visits	V129521	731	649	-11.2	3,890	3,302	-15.1
Top seven countries							
- United Kingdom		128	125	-2.3	721	691	-4.2
- Japan		99	72	-27.3	423	249	-41.1
- France		56	49	-12.5	312	274	-12.2
- Germany		45	39	-13.3	292	253	-13.4
- Australia		33	27	-18.2	149	136	-8.7
- South Korea		28	28	0.0	143	133	-7.0
- Mexico		26	23	-11.5	161	132	-18.0
<b>CANADIANS OUTSIDE CANADA ('000)</b>							
To United States	V125228	7,804	8,078	3.5	34,559	34,151	-1.2
One or more nights visits	V129534	2,657	2,709	2.0	13,024	12,667	-2.7
- By auto	V125231+V125232	1,435	1,494	4.1	7,691	7,495	-2.5
To overseas (one or more nights)	V125260	963	1,117	16.0	4,680	5,074	8.4
<b>INDUSTRY</b>							
Airline passengers (Level I) ('000)	V11743	5,196	4,698	-9.6	23,430	20,042	-14.5
Airline passenger-km (Level I) (millions)	V11744	14,846	13,911	-6.3	69,254	59,509	-14.1
<b>PRICES 1992 = 100 (not s.a.)</b>							
Travel Price Index	V121654	136.3	136.1	-0.1	136.0	137.8	1.3
Consumer Price Index	V735319	120.6	122.6	1.7	119.0	122.3	2.8
- Restaurant meals	V735392	123.0	126.2	2.6	122.1	125.1	2.5
- Inter-city transportation	V735515	189.7	188.6	-0.6	187.1	191.4	2.3
- Renting and leasing of automotive vehicles	V735499	128.8	125.0	-3.0	127.1	124.4	-2.1
- Gasoline	V735501	133.2	129.0	-3.2	127.2	135.4	6.4
<b>ECONOMIC</b>							
Gross Domestic Product, 1997 prices (s.a.) (millions)	V2036138	1,003	1,023	2.0	992	1,013	2.1
- Amusement and recreation (millions)	V2035809	9,160	9,644	5.3	9,171	9,555	4.2
- Accommodation and food services (millions)	V2035815+V2035816	23,329	23,244	-0.4	23,235	22,691	-2.3
Personal disposable income per capita (s.a.)	V498186/V1	22,484	22,751	1.2	22,308	22,722	1.9
<b>LABOUR ('000)</b>							
Labour force	V2091051	16,766	17,045	1.7	16,690	17,047	2.1
Unemployed	V3433877	1,185	1,192	0.6	1,278	1,301	1.8
Employed	V2091072	15,581	15,854	1.8	15,412	15,746	2.2
- Accommodation and food services	V2710158	999	1,009	1.0	1,004	1,022	1.8
<b>EXCHANGE RATES (in Canadian dollars)</b>							
American Dollar	V37426	1.5695	1.3158	-16.2	1.5703	1.4010	-10.8
British Pound	V37430	2.4662	2.2460	-8.9	2.3587	2.2877	-3.0
Japanese Yen	V37456	0.0128	0.0121	-5.5	0.0126	0.0121	-4.0
Euro Dollar	V121742	1.0141	1.0921	7.7	0.9925	1.1130	12.1

(s.a.) Seasonally adjusted.