

***Meet your newest tourism information tool (as of 2005):***

## **Travel Survey of Residents of Canada (TSRC)**

Canadians travelling in Canada are the biggest market for most tourism businesses in this country. This important *domestic* market segment represents about 80% of all trips and about 70% of all tourism spending in Canada each year. With so much at stake, understanding the size and characteristics of the Canadian tourism market is vital to national, provincial and territorial tourism marketing and planning organizations and to tourism businesses throughout the country.

In order to provide even better estimates of domestic tourism than have been available in the past, tourism research partners from all national, provincial and territorial jurisdictions supported the development and launch in 2005 of the Travel Survey of Residents of Canada (TSRC). Conducted by Statistics Canada, the TSRC offers some significant benefits over its predecessor – the Canadian Travel Survey (CTS).

The new study is conducted by telephone with approximately 14,000 randomly selected household members each month. Respondents are drawn from Statistics Canada's Labour Force Survey's household sampling frame. Selected adults (18+ years) are asked to report on any out-of-town trips they took in the month immediately preceding the interview period. Details are then obtained about each trip that qualifies as a *tourism* trip.

The TSRC relies on a different approach to defining *domestic tourism* and collects information from a *different portion* of the Canadian population than did the CTS. For these reasons, TSRC estimates of domestic tourism volume, value and characteristics are not directly comparable to historical estimates from the Canadian Travel Survey.<sup>1</sup>

### ***A Focus on YOUR Customers***

TSRC domestic tourism estimates reflect trips with purposes and activities that are directly served by tourism businesses. The new survey does a better job of filtering **in** *tourism trips* and filtering **out** *routine trips* than did the CTS.

In the new survey, trips made for routine household or grocery shopping, medical and dental appointments, religious observance, sales calls, along with exclusions historically covered in the CTS such as commuting to work or school, military or diplomatic trips and those made to move to a new residence are deemed non-touristic trips in the TSRC.<sup>2</sup> Thus, these routine trips are now *excluded* from estimates of domestic tourism.

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<sup>1</sup> Additional differences between the two surveys such as questionnaire wording, question sequence, response categories and differences in allocation and data management principles contribute to the lack of direct comparability between estimates of domestic tourism volume and value between 2004 CTS estimates and 2005 TSRC estimates.

<sup>2</sup> The TSRC also excludes trips made to help someone else move to a new residence, in keeping with the change in "main purpose of *trip*". In the new survey, the main purpose of the "trip" rather than the consumer's main reason for travel is captured. This shift in emphasis brings the TSRC into greater harmony with the global guidelines for defining *trip purpose* as outlined by the World Tourism Organization.

### ***A Common Metric for Canada***

The World Tourism Organization's guidelines state that for a trip to be considered *tourism*, the traveller must leave his or her "usual environment". Historically, Canada relied on a distance minimum for determining if a person left the *usual environment*. Different jurisdictions used different distances (e.g., no distance minimums for overnight trips versus 80 kms minimums). These variations made it difficult to estimate market share across provinces or municipalities.

With the changes made in the TSRC, a common metric will be used in all jurisdictions. As a result, it should be a lot easier to make direct comparisons from one province or municipality to another.

To capture *leaving the usual environment* in a more consumer-driven way, the individual is asked if he or she took any *out-of-town* trips during a calendar month. Thus, "out-of-town" replaces the one-way distance minimum for the important *overnight* tourism segment.<sup>3</sup>

In the interests of reducing respondent burden associated with the number of very short out-of-town same-day trips residents of Canada may take, a minimum one-way distance of forty kilometres (40 kms) is required for a non-routine same-day trip to qualify as a tourism trip in the TSRC.<sup>4</sup>

### ***A Focus on Trip Decision-Makers***

In the TSRC, individuals 18 years of age or over are asked to report on their out-of-town travel in the month preceding the telephone interview. By increasing the age of the consumer from 15 years (CTS) to 18 years, the new study puts the spotlight more clearly on trip decision-makers. The new reporting unit for volume, value and characteristics will be *trips taken by adults living in Canada*. The need for data on travel by children, whether with family or with school or other groups, will have to be addressed by other studies.

The presence or absence of children on a trip will be treated as a trip characteristic in the TSRC.<sup>5</sup> This will reduce the number of trips generated compared to the CTS but will have no impact on spending levels because value estimates reflect spending by all household members on the trip.

### ***More Marketing-Oriented Information***

Tourism marketers, planners and businesses will have more detailed information on the characteristics of the domestic tourism market than they have had in the past. For example, the questionnaire has been enhanced to include more types of commercial accommodation, more information on activities, household travel party size, more details about transportation used on the trip and other characteristics (see appendix for examples).

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<sup>3</sup> In the CTS, the one-way distance minimum for an overnight trip to qualify as a *tourism trip* was 80km for most national and provincial/territorial statistics. No distance minimum was required for overnight trips by Ontario residents to qualify as *tourism* trips.

<sup>4</sup> In the CTS, the one-way distance minimum for a same-day trip to qualify as a *tourism trip* was 80km for most national and provincial/territorial statistics and 40km for residents of Ontario.

<sup>5</sup> In the CTS, a separate weight was applied to each child that accompanied the survey respondent (household members 15+) on the trip. The change in the TSRC was made to improve consistency between the reporting unit and the weighting unit.

### ***Faster Reporting***

Once the TSRC production systems have been thoroughly tested, topline volume estimates from the survey will be published approximately 6 weeks after data collection. The faster turnaround time will put the TSRC on the same reporting schedule as the International Travel Survey (ITS). As a consequence, tourism businesses, planners and marketers will have more timely preliminary snapshots of the "entire" market – tourism by Canadians, Americans and Overseas visitors to Canada than they have had in the past.

### ***A New "Baseline" Year***

2005 will be the new baseline year for domestic tourism in Canada. Because the TSRC relies on a different approach to defining *domestic tourism* and collects information from a different portion of the Canadian population than did the CTS, direct comparisons cannot be made to CTS historical estimates.

Statistics Canada has plans to examine whether computer modeling of CTS vs. TSRC data can produce viable "adjustment factors" to enable those who rely on time series data to use "adjusted" CTS historical data. Results of this examination will be available in 2006.

The results of the TSRC in its first year (2005) will be preliminary and may be revised as more data become available.

### ***Where to Get More Information***

For more details about the survey contact:

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**Appendix: Some Differences in Content between TSRC and CTS**

<b>Accommodation Categories</b>		
	<b>TSRC</b>	<b>CTS</b>
Hotel	X	X
Motel	X	X
Resort	X	X
Cottage, cabin or vacation home	X	X
Campground, RV park or back country camping	X	X
Bed and breakfast or tourist home	X	X
Hunting and fishing lodge, camp or outpost	X	X
Boat or cruise ship	X	
Spa	X	
Farm or guest ranch	X	

<b>Activities Participated In On The Trip</b>	
<b>TSRC</b>	<b>CTS</b>
Visiting friends/relatives	Visiting friends/relatives
Shopping	Shopping
Sightseeing	Sightseeing
Attend a festival or fair	Attend a festival, fair or exhibition
Attend an aboriginal event or performance	Attend aboriginal/native cultural event
Attend any other performance, such as a play or a concert	Attend cultural events (plays, concerts)
Attend a sports event as a spectator	Attend sports event
Visit a museum	Visit a museum or art gallery
Visit an art gallery	
Visit a zoo or an aquarium	Visit a zoo, aquarium, botanical garden
Visit a botanical garden	
Visit a theme or amusement park	Visit a theme or amusement park
Visit a national, provincial or other nature park	Visit a national, provincial or other nature park
Visit an historic site	Visit an historic site
Go to a bar or night club	Went to a bar or nightclub
Go to a casino	Went to a casino
Go to a conference, convention or trade show	
Participate in sports/outdoor activity	Participate in sports/outdoor activity
<i>Specific outdoor activities</i>	<i>Specific outdoor activities</i>
Go camping	
Go hiking or backpacking	Walking or hiking
Play golf	Golfing
Go bird watching	Bird or wildlife viewing
Go wildlife viewing	
Go canoeing or kayaking	Boating
Go to a beach	Other water-based activities
Go fishing	Fishing
Go cycling	Cycling
Go hunting	Hunting
Go cross-country skiing	Cross-country skiing
Go downhill skiing	Downhill skiing
Go snowboarding	
Go snowmobiling	Snowmobiling
Play team sports	Swimming
Other sport/outdoor activity	Other sport/outdoor activity
	Took a cruise or boat trip