THE VALUE OF TOURISM IN BRITISH COLUMBIA

Trends from 2004-2014
July 2016

Destination British Columbia™

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1. Overview

The Value of Tourism in British Columbia: Trends from 2004-2014 presents 10 years of data on the economic value of tourism to British Columbia. These measures include: tourism revenue—money received by businesses, individuals and governments due to tourism activities; tourism GDP—the industry's overall contribution to British Columbia's economy; tourism businesses and employment—a profile of the number of businesses and employees working in the industry; and visitor volume and expenditure data—both domestic and international.

Overall, the tourism industry in British Columbia has demonstrated strong growth since 2004 despite multiple external shocks such as the 2009 H1N1 virus, the 2011 earthquake and tsunami in Japan, and the global economic crisis. While significant, these setbacks have been mitigated by the positive impacts stemming from the 2010 Olympic and Paralympic Winter Games in Vancouver and Whistler, and the successful implementation of Approved Destination Status for Canada from China.

↑
+ 5.1%
Total Tourism Revenue

↑
+ 9.0%
Total Room Revenue

↓
-7.6%
Provincial Tax Revenue

↑
3.7%
Export Revenue

↑
+4.5%
Tourism GDP

Key highlights in 2014:

- In 2014, the tourism industry generated $14.6 billion in revenue, a +5.1% increase from 2013 and a +37.7% increase over 2004.
  - In 2014, $1.7 billion of accommodation room revenue was earned in participating communities with the Municipal Regional District Tax (MRDT)[1], an increase of +9.0% from 2013.
  - The tourism industry contributed $825 million in provincial taxes, a decrease of -7.6% from 2013 and an increase of +13.2% from 2004[2].
  - In 2014, $3.9 billion in export revenue was generated, an increase of +3.7% over 2013.
- Tourism generated a direct contribution to British Columbia's gross domestic product (GDP) of $7.1 billion (2007 constant dollars), an increase of +4.5% from 2013 and a +13.1% increase over 2007[3].

[1] MRDT data has been collected since 2010. Participating British Columbia municipalities that have implemented the MRDT accounted for 70% to 75% of total provincial accommodation room revenue.
[2] The decrease in 2014 provincial taxes was largely due to British Columbia's transition from the Harmonized Sales Tax (HST) to the Provincial Sales Tax (PST) on April 1, 2013.

- In 2014, there were 18,682 tourism-related businesses in operation in British Columbia.[4]
- The tourism industry employed 127,500 people in 2014, an increase of +2.2% over 2013 and an increase of +18.4% over 2004.
- In 2014, total tourism wages and salaries were $4.3 billion, up +4.5% from 2013 and up +30.3% over 2004. Average compensation in the tourism industry is $34,000.
- In 2014, there were 14.2 million overnight domestic visitors (i.e., from Canada) to British Columbia. The number of overnight visitors to British Columbia from Canada decreased -3.1% since 2013. Nearly 10.6 million overnight visitors (74.2% of total British Columbia's visitation) were British Columbia residents.
- Overnight domestic visitor expenditures totalled $5.4 billion in 2014, a decrease of -4.1% since 2013. British Columbia resident visitors contributed the largest portion of expenditures (59.2%, accounting for $3.2 billion), an increase of +2.7% from 2013.
- In 2014, there were 4.4 million overnight international visitors (i.e., from other countries) to British Columbia, an increase of +0.9% from 2013. Nearly two-thirds (64.7%, 2.8 million) of all international overnight visitors were from the United States.
- In 2014, overnight international visitor expenditures reached $3.9 billion, an increase of +3.7% over 2013. United States visitors were the source of the largest share of international expenditures (41.8%, $1.6 billion).

18,682

Tourism Businesses

↑ **+2.2%**

Tourism Employment

↑ **+4.5%**

Tourism Wages & Salaries

14.2 million

Domestic Visitor Volume

$5.4 billion

Domestic Expenditures

4.4 million

International Visitor Volume

$3.9 billion

International Expenditures

[4] In 2014, BC Stats implemented a new methodology regarding how information is reported in the Business Register. As a result, there is a break in the tourism businesses data and 2014 cannot be compared to years prior.

2. Contributions to the economy

There are two principal ways of measuring the tourism industry's contribution to the British Columbia economy:

- Tourism revenue measures the monetary amount received by businesses, individuals and governments, due to tourism activities.

- Gross domestic product (GDP) measures the value added to the economy by tourism activities. The cost of supplies and services used to produce goods or services are subtracted from total revenues. This measure highlights the economic contribution the tourism industry makes to the British Columbia economy.

Accurately estimating tourism revenues is challenging because the tourism industry draws from parts of several industries: accommodation and food services, retail services, transportation services and other services. Many tourism and statistical agencies have adopted a supply-side approach to estimating tourism revenue by developing tourism satellite accounts (TSA)[5]. Statistics Canada and Destination Canada have been leaders in developing a national TSA, which is the source of estimates of tourism revenue for Canada as a whole.

In 2009, British Columbia's provincial statistical agency (BC Stats) adopted a supply-side approach for estimating tourism industry revenues for British Columbia. The total revenue for each tourism-related industry is calculated directly from annual and monthly data collected from businesses. Then, a specific tourism proportion is applied to the revenue for each tourism-related industry to estimate the total revenue due to the tourism industry. This approach is similar to the methodology that was already in place for estimating tourism GDP. This year, 2014, there have been changes to some of the tourism proportions. These changes are the result of a review of the methodology used to generate the estimates which has resulted in a more internally consistent and cohesive data set.[6] Some of these changes have resulted in a downward revision of the tourism sector estimates, while others have led to upward revisions. The historical data series has been revised to take into account these changes. Overall estimated tourism revenues are marginally lower than found using the previous proportions, and estimated GDP has been reduced by about -8%.

This section summarizes total tourism revenues and the tourism industry's GDP between 2004 and 2014. The section also includes accommodation room revenue estimates, tax revenues and export revenues. Detailed tables are available in Appendix A; Tables 1 through 7 are specific to the information covered in this section.

[5] A TSA is a system of measuring the impact of tourism on the economy; it is a framework that accounts for the impacts across all industries which, in turn, reveals the total direct impact on the economy.

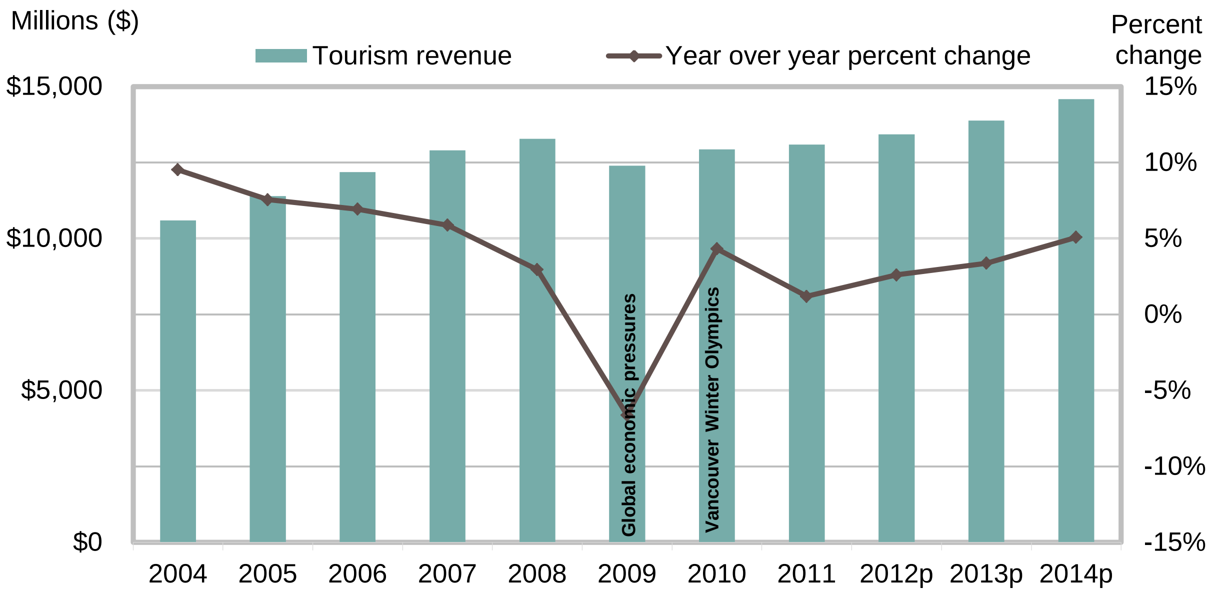
[6] For more information on the revised methodology, visit BC Stats website: http://www.bcstats.gov.bc.ca/StatisticsBySubject/BusinessIndustry/Tourism.aspx under "Changes to the BC Stats Methodology for Measuring the Size of the Tourism Sector"

TOURISM REVENUES

Total revenue

British Columbia's tourism industry generated revenues of $14.6 billion in 2014[7], an increase of +5.1% from 2013 (Figure 1). Since 2004, total tourism revenues have grown +37.7%. In fact, tourism revenues have grown every year between 2004 and 2014, with the exception of 2009. However, year over year growth varied considerably, ranging between an increase of +9.5% in 2004 and a decrease of -6.6% in 2009. The decline of tourism revenues in 2009 was caused by numerous factors, notably the global economic recession (particularly the impact on the United States) and the appreciation of the Canadian dollar. The increase in tourism revenues that began in 2010 and continued through 2014 was at least partially attributable to the high-profile exposure from the 2010 Olympic and Paralympic Winter Games, implementation of Approved Destination Status for Canada in China (in conjunction with increased air capacity from China), and a rebound of the global economy. For more information, see Table 1, page 30.

FIGURE 1: OVERALL TOURISM REVENUE AND YEAR-OVER-YEAR CHANGE (2004 TO 2014)

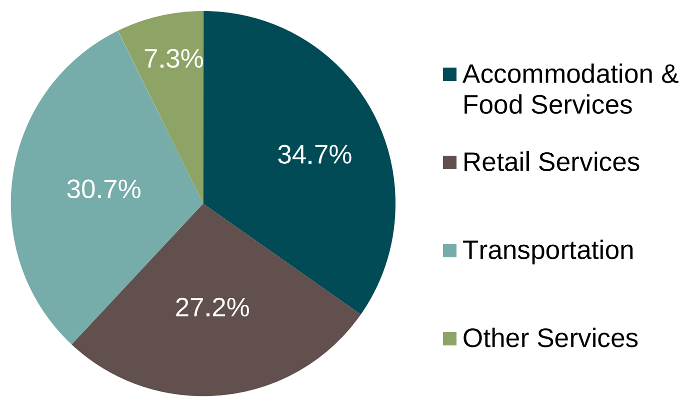


It is important to understand the breakout of revenue by market of origin for business planning and marketing and development investments. While the supply-side approach does not permit this breakout, this information can be captured through a demand-side approach. The relative importance of different markets generating revenue for the tourism industry and the extent to which growth rates differ (as well as other traveller and trip behaviour and characteristics) can be captured through visitor surveys and is presented in Section 4 (Market of origin) of this report, page 22.

[7] Source: BC Stats; 2012, 2013, and 2014 data are preliminary and subject to revision ("2012p", "2013p" and "2014p").

Tourism revenue by sector

FIGURE 2: SHARE OF 2014 TOURISM REVENUE BY SECTOR



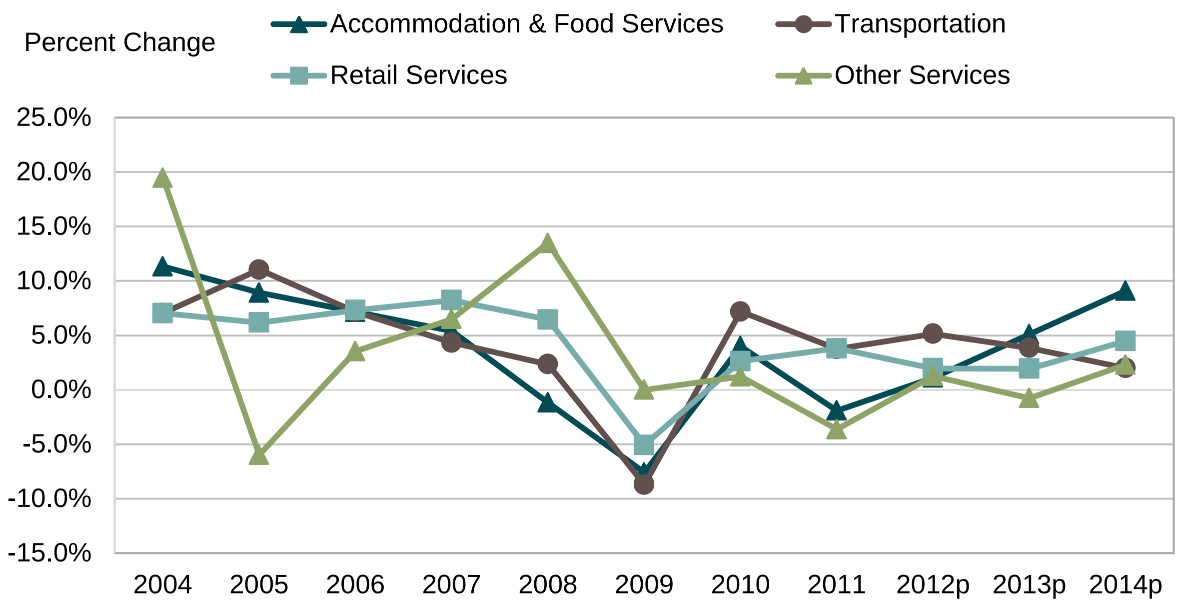
Accommodation & food services generated over one-third (34.7%) of total tourism revenues in 2014. Transportation accounted for nearly a third (30.7%) and retail services accounted for more than a quarter (27.2%) of total tourism revenues in 2014 (Figure 2).

Other tourism-related services (including vehicle rentals, tourism-related recreation and entertainment, and vacation homes) accounted for 7.3% of total revenues.

Since 2004, strong growth for retail services, transportation, and accommodation & food services was seen, with increases of +44.2%, +43.7% and +32.8%, respectively. Other tourism-related services grew by +18.0%.

The share of total revenue generated by each sector remained relatively constant from 2004 to 2014, however, annual growth rates fluctuated considerably (Figure 3). For most sectors, 2009 was a year of decrease due to the economic recession, with levels returning in 2011, 2012 and 2013 to those seen in previous years. For more information, see Table 2, page 31.

FIGURE 3: TOURISM REVENUE GROWTH RATES BY SECTOR (2004 TO 2014)



Accommodation & food services had an average annual growth of +3.8% over the 10-year period. The sector saw declines during 2008 and 2009, with an average change of -4.4% per year. From 2010 to 2014, revenue increased at an average rate of +3.5% per year; positive growth was seen each year with the exception of 2011.

The transportation services sector had an average annual growth of +4.1% between 2004 and 2014. Between 2008 and 2009, the sector's revenue decreased at an average rate of -3.2% per year. From 2010 to 2014, growth at an average rate of +4.4% per year was seen, with every year reporting positive growth.

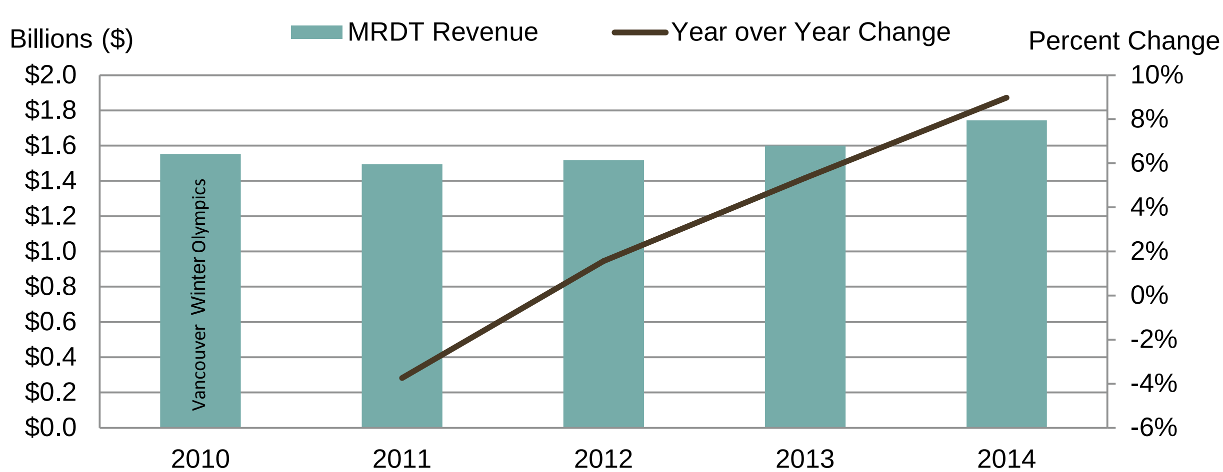
The retail services sector has seen a relatively constant rate of growth since 2004 with an average annual growth rate of +4.1%. Between 2008 and 2009, the sector's growth rate decreased to +0.7%, then rebounded between 2010 and 2014, with an average growth rate of +3.0%. Excluding 2009, every year has seen a positive annual growth rate.

The performance of other tourism-related services has varied greatly over the years, with a high of +19.5% growth in 2004 to a low of -6.0% decline in 2005. From 2010 to 2014, the sector has had an average growth rate of +0.1%.

Accommodation room revenue

Total provincial accommodation room revenue is no longer available due to the elimination of the Hotel Room Tax in 2010. However, it is possible to estimate accommodation room revenue for urban centres, communities and regional districts that collect the Municipal Regional District Tax (MRDT). MRDT revenue has been accelerating since 2010, with an average growth of +5.3% per year (Figure 4). In 2014, MRDT revenue grew +9.0% since 2013 and reached a total of $1.7 billion. The province saw a decrease in MRDT revenue between 2010 and 2011, from $1.6 to $1.5 billion (-3.7%). This was partly due to the spike in MRDT revenue associated with hosting the Olympic and Paralympic Winter Games in 2010 and the residual effects of the global economic crisis of 2008.

FIGURE 4: OVERALL MRDT REVENUE AND YEAR-OVER-YEAR PERCENT CHANGE (2010 TO 2014)



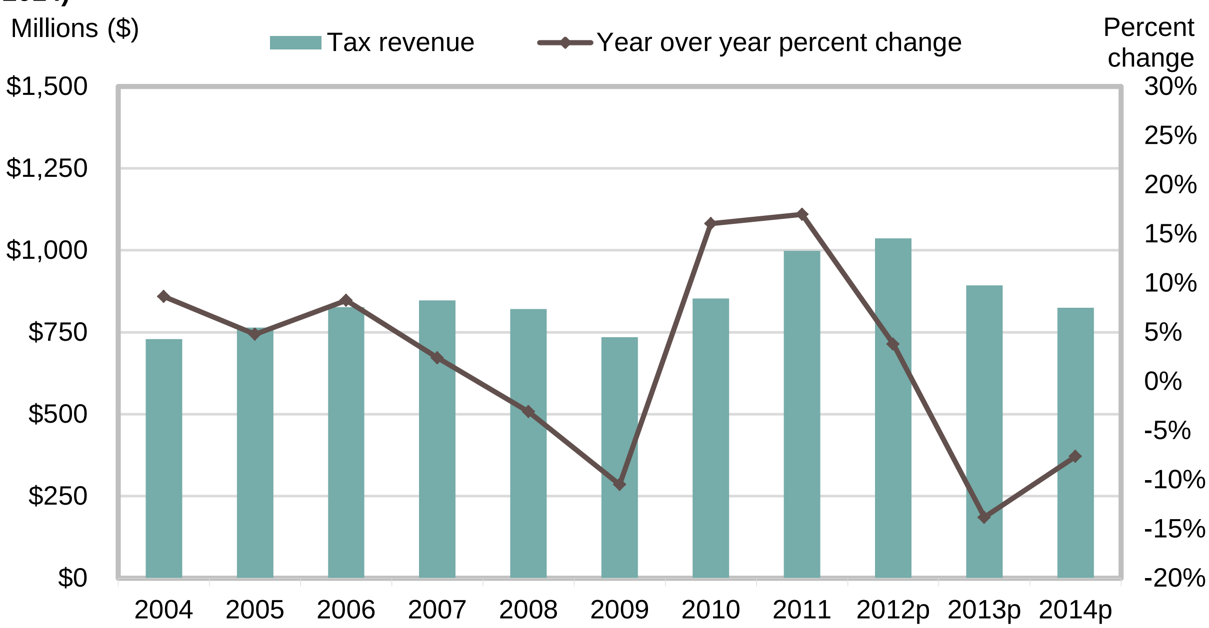
While community participation since 2010 can vary, the majority of communities in the program have continued throughout the years. Overall, between 2010 and 2014, 49 to 50 communities actively participated. Room revenue of select participating MRDT communities can be found in Table 4, page 33.[8]

Tax revenue[9]

In 2014, the tourism industry generated $825 million in revenue from provincial taxes, which include income, hotel, gas, and other taxes (Figure 5). In 2014, tourism-related tax revenue decreased -7.6% from 2013. This decrease was largely due to British Columbia's transition from the HST to the Provincial Sales Tax (PST) on April 1, 2013. Since 2004, tax revenue has increased by +13.2%. For more information, see Table 1, page 30.

In 2004, British Columbia experienced a +8.6% growth in tourism tax revenue. The growth in tax revenue continued to grow between 2004 and 2007 (average growth of +6.0%), due to industry growth. Provincial tourism tax revenues decreased in 2008 and 2009, but increased +16.1% in 2010, as the industry recovered from the global recession and the Harmonized Sales Tax (HST)[10] introduction on April 1, 2010. In 2011, the HST was in effect for a full calendar year – the increase in tax revenue seen (+17.0%) was largely due to this. In 2012, the second full year of the HST, tax revenue growth stabilized (+3.8%).

FIGURE 5: TOURISM-RELATED TAX REVENUE AND YEAR-OVER-YEAR CHANGE (2004 TO 2014)



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[8] For a more detailed list of participating communities and their associated room revenue, visit BC Stats website (http://www.bcstats.gov.bc.ca/StatisticsBySubject/BusinessIndustry/Tourism.aspx) under "January 2010 to current".

[9] Source: BC Stats; 2012, 2013, and 2014 tax revenue data are preliminary and may be revised by BC Stats ("2012p", "2013p", and "2014p").

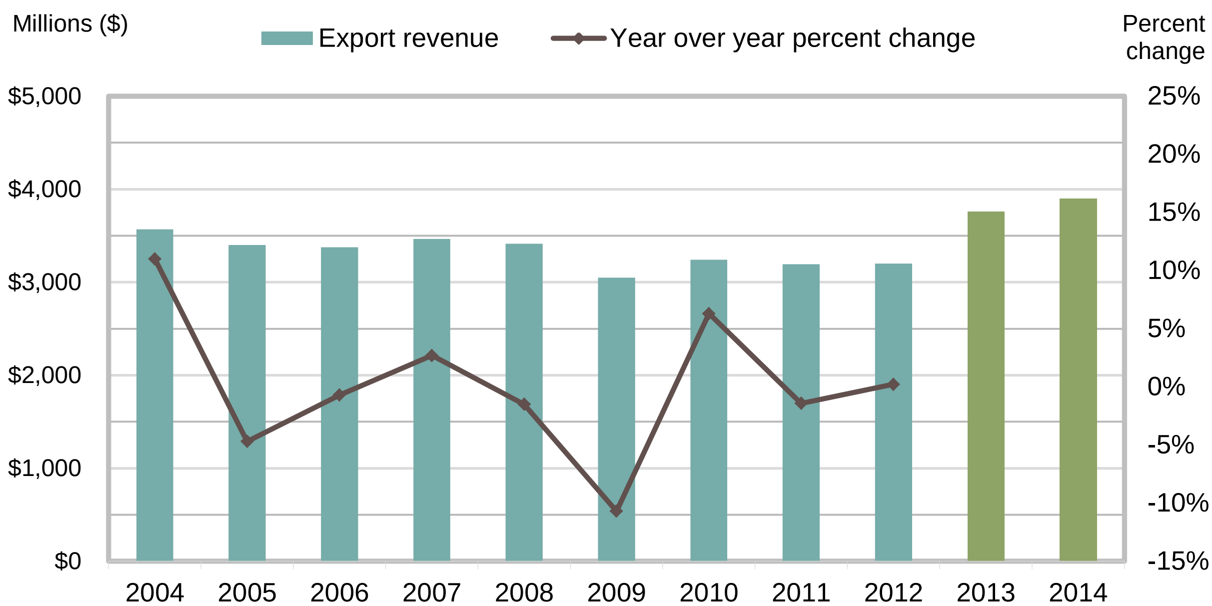
[10] The Harmonized Sales Tax (HST) is applicable to consumer purchases, many of which were previously exempt from the Provincial Sales Tax.

Export revenue

Tourism export revenue is generated from the sale of tourism products and services to international visitors. The tourism industry generated $3.9 billion in export revenue in 2014, growing +3.7% from 2013 (Figure 6). Changes in methodology by Statistics Canada in 2013 created a break in trend data for tourism export revenue and thus the level of tourism export revenue in 2013 and 2014 cannot be compared directly to prior years.

Tourism export revenue varied considerably between 2004 and 2012. In 2004, export revenue rebounded +11.0% from 2003 which saw a decline of -12.3% largely due to the impact of SARS. Export revenue dropped by -4.7% in 2005 and stabilized in 2006. The slight gain in 2007 was offset in 2008 and export revenue dropped dramatically in 2009, as the global recession impacted international markets. Export revenue grew by +6.3% in 2010, dipped by -1.4% in 2011, and grew very slightly in 2012 (+0.2%). Overall, tourism export revenue decreased by -0.4% between 2004 and 2012. For more information, see Table 1 and 3, page 29 and 32.

FIGURE 6: TOURISM EXPORT REVENUE (2004 TO 2014)



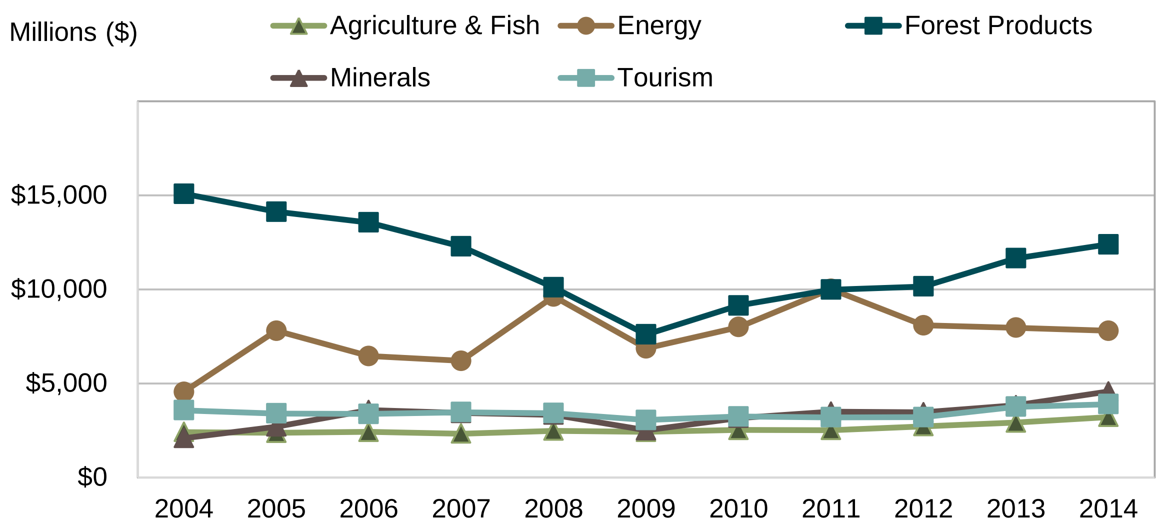
Please note the methodology change only occurred for the tourism industry and did not occur for other industries as provided by BC Stats. Between 2004 and 2012, the tourism industry's export revenue was similar to that of agriculture & fish products and mineral products (Figure 7). While agricultural exports have remained relatively steady at an average of $2.6 billion per year, mineral exports rose +83.5% since 2004 to $4.6 billion.

Forest product export revenues have increased since 2009 to $12.4 billion, but are still down -22.7% since 2004.[11] Energy exports generated the largest export revenues in 2011 ($10.0 billion) and decreased by -1.9% in 2014 compared to 2013. There has been a

[11] Ministry of Forests and Range, 2009/10-2011/12 Service Plan Update: Declines were due to the weakening housing market, low timber prices, softwood lumber duties and the weakening pulp market.

dramatic increase (+74.9%) in energy export revenues since 2004. For more information, see Table 3, page 32.

FIGURE 7: EXPORT REVENUE FROM BRITISH COLUMBIA'S PRIMARY RESOURCE COMMODITIES (2004 TO 2014)

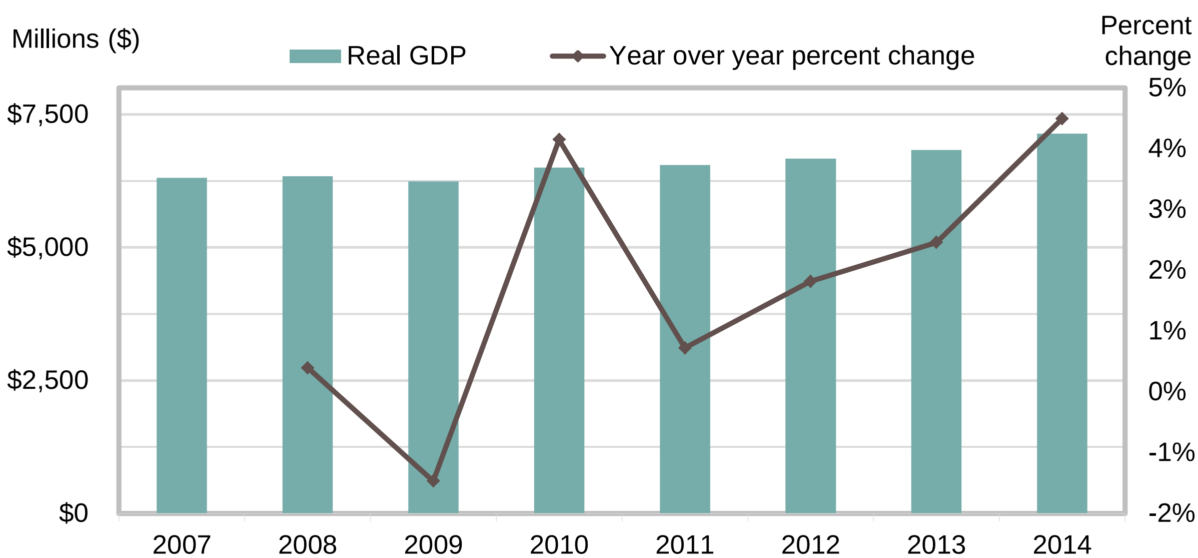


GROSS DOMESTIC PRODUCT (GDP)

GDP

While British Columbia's tourism industry generated $14.6 billion in total revenue, it contributed $7.1 billion of added value, or GDP, to the economy in 2014 (in 2007 constant dollars). An increase of +4.5% was seen over 2013, and an increase of +13.1% from 2007 (Figure 8). For more information see Table 1, page 30.

FIGURE 8: TOURISM GROSS DOMESTIC PRODUCT AND YEAR-OVER-YEAR CHANGE (2007 TO 2014)

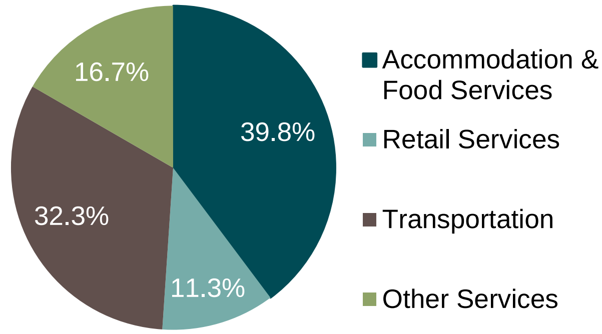


GDP by sector

In 2014, accommodation & food services accounted for 39.8% of tourism GDP (based on 2007 constant dollars). Transportation followed, accounting for 32.3% of British Columbia's tourism GDP (Figure 9).

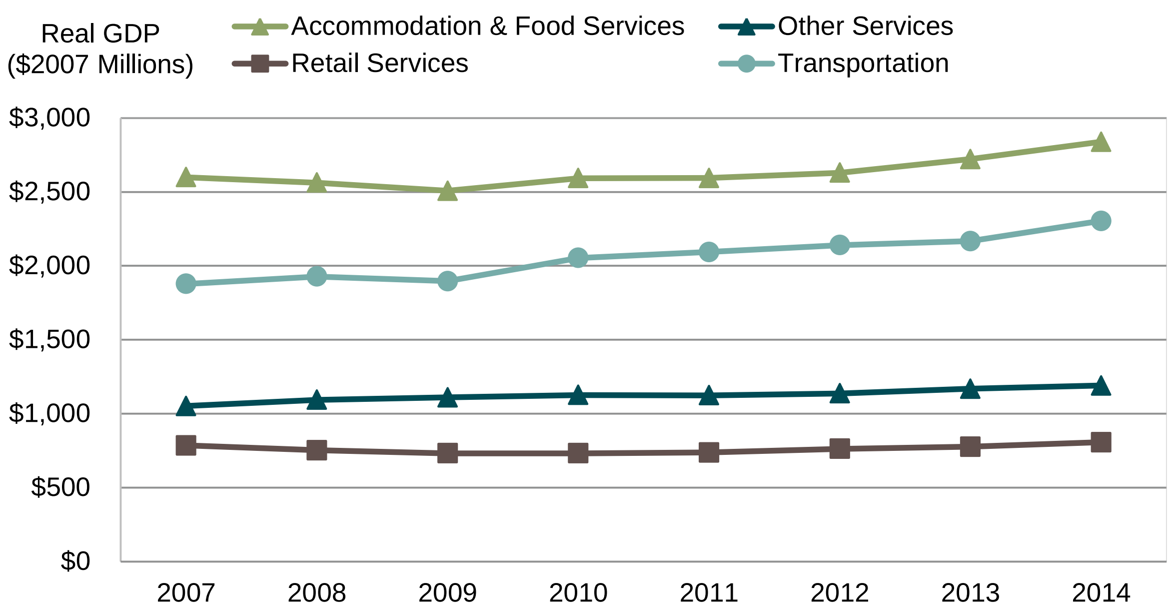
While retail services earned 27.2% of tourism revenue, this sector only accounted for 11.3% of tourism GDP. Other services earned 7.3% of revenue but accounted for more than double that (16.7%) in terms of GDP share.

FIGURE 9: SHARE OF 2014 GDP BY SECTOR



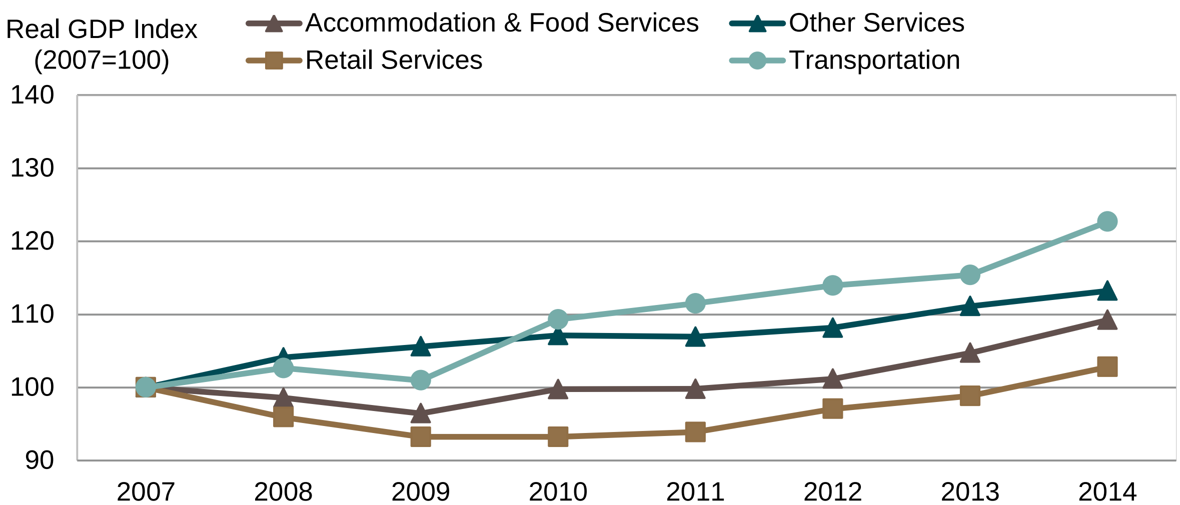
Transportation and accommodation & food services have seen growth in real GDP since 2007 (+22.7% and +9.2%, respectively). Retail has also seen modest growth since 2007 (+2.8%). Real GDP of other services also increased (+13.2%) (Figure 10). For more information, see Table 5, page 34.

FIGURE 10: REAL GDP BY SECTOR (2007 TO 2014)



The real GDP index of the tourism sector saw an overall growth of +13.1% since 2007. The accommodation & food services index and transportation index lost ground in 2009, but resumed growth in 2010, which continued through to 2014. The retail services sector index has seen limited growth since a decline in 2009 but grew +4.0% in 2014 (compared to 2013) (Figure 11). For more information, see Table 6, page 35.

FIGURE 11: REAL GDP INDEX BY SECTOR (2007 TO 2014)

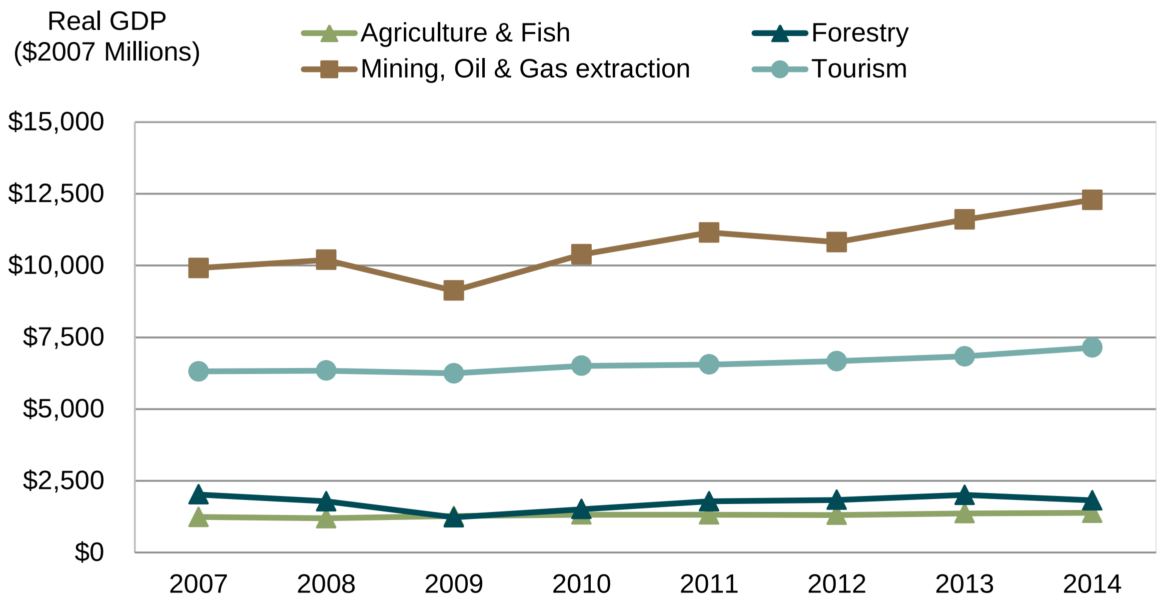


GDP by primary resource industry

The tourism industry makes a significant contribution to British Columbia's economy along with other primary resource industries[12], including forestry, agriculture & fish[13], and mining, oil & gas extraction (Figure 12). From 2007 to 2014, GDP of the mining, oil & gas extraction, tourism and the agriculture & fish sectors each increased (+24.0%, +13.1% and +11.5%, respectively), while forestry has dropped significantly (-10.2%). For more information, see Table 7, page 35.

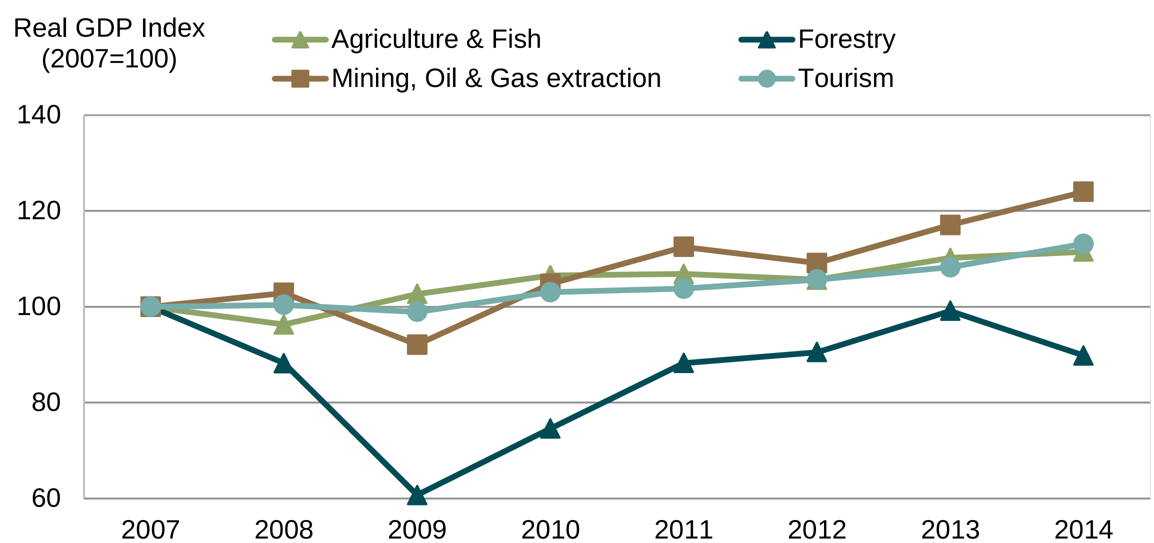
[12] Source: BC Stats (http://www.bcstats.gov.bc.ca/StatisticsBySubject/Economy/EconomicAccounts.aspx, 2002-2014, chained 2007$).
[13] "Agriculture & fish" includes crop and animal production, agricultural support services, and fishing, trapping and hunting.

FIGURE 12: REAL GDP BY PRIMARY RESOURCE INDUSTRY (2007 TO 2014)



The real GDP index of tourism and the agriculture & fish sectors have hovered around their respective 2007 levels, while the real GDP index for the forestry sector experienced high variation. Similarly, the real GDP index for mining, oil & gas extraction has fluctuated since 2007 (Figure 13). For more information, see Table 7, page 35.

FIGURE 13: COMPARING REAL GDP INDEX BY PRIMARY RESOURCE INDUSTRY (2007 TO 2014)



3. Business and people

In addition to the revenues and GDP that the tourism industry contributes to the British Columbia economy, the industry supports a wide range of small, medium and large businesses, and provides jobs across the province.[14]

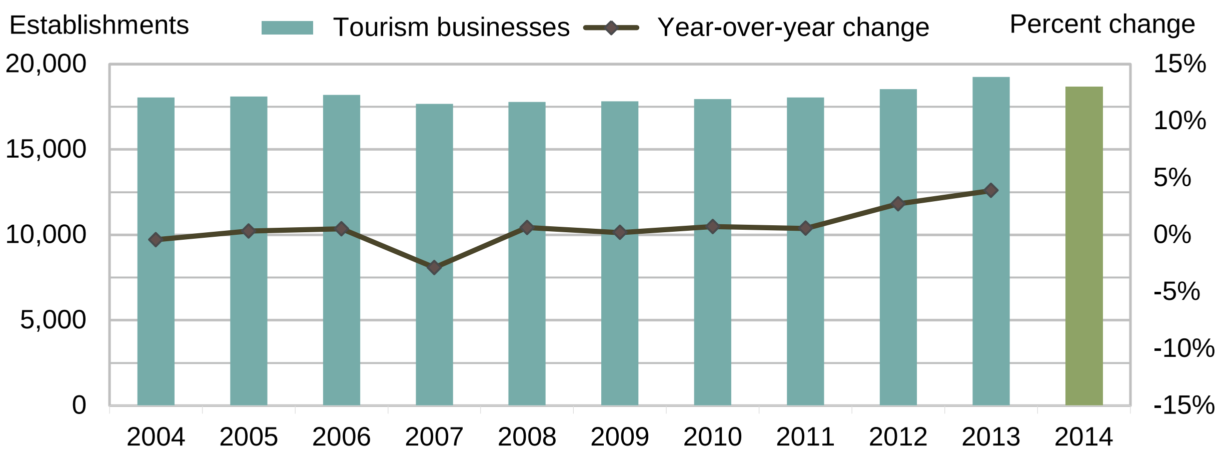
This section summarizes statistics on tourism businesses and tourism employment in British Columbia. Detailed tables are available in Appendix A; Tables 1 and 8 through 13 are specific to the information covered in this section.

TOURISM BUSINESSES

Total businesses

In 2014, there were 18,682 tourism-related businesses operating in British Columbia (Figure 14). In 2014, BC Stats implemented a new methodology regarding how information is reported in the Business Register. This new methodology has not been applied retroactively, and as a result, 2014 data cannot be compared to years prior. The number of tourism establishments was fairly steady from 2004 to 2013, with overall growth of +6.8%, while 2012 and 2013 saw substantial growth (+2.7% and +3.9%, respectively). For more information, see Table 1, page 30.

FIGURE 14: COUNT OF TOURISM BUSINESSES AND YEAR-OVER-YEAR CHANGE (2004 TO 2014[15])



Total businesses by size

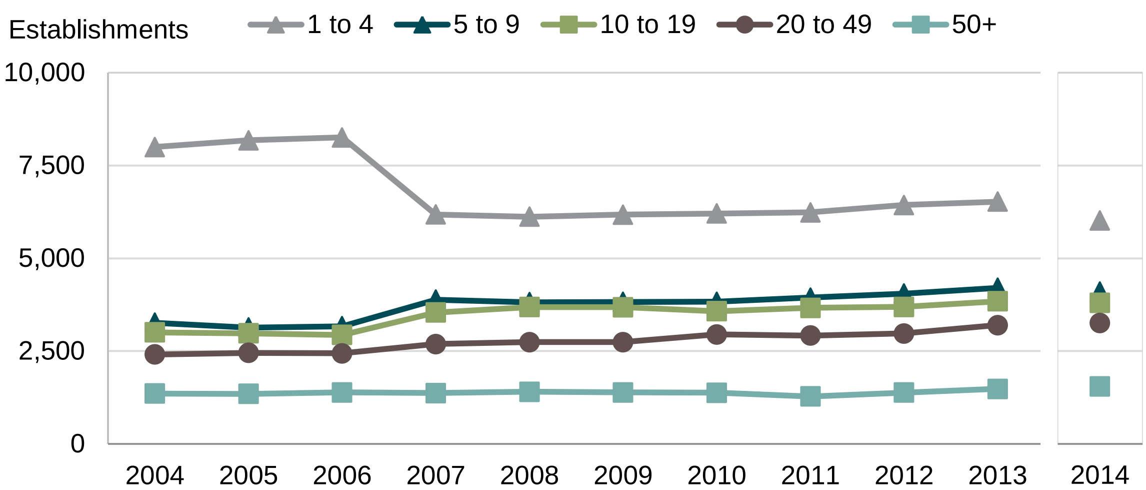
In 2014, tourism businesses with less than 20 employees totalled 13,895 (3,248 with 20 to 49 and 1,539 with 50 or more employees).

The decrease in the number of tourism businesses in 2007 occurred primarily among very small businesses (those of 1 to 4 employees).[16] In 2006, very small businesses accounted

[14] Source: BC Stats.

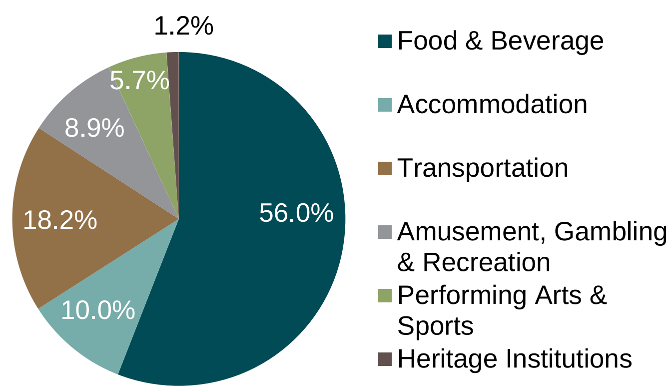
for 45.4% of all businesses; this dropped to 6,179 in 2007, a decline of -25.2% from the previous year (Figure 15). From 2007 through 2011, the number of businesses regardless of size was nearly stable. For more information, see Table 8, page 36.

FIGURE 15: COUNT OF TOURISM BUSINESSES BY SIZE (2004 TO 2013; 2014)



Tourism businesses by sector

FIGURE 16: SHARE OF 2014 TOURISM BUSINESSES BY SECTOR



Over half of British Columbia's tourism-related businesses were in the food & beverage (56.0%), followed by transportation (18.2%) and accommodation (10.0%) (Figure 16).[17]

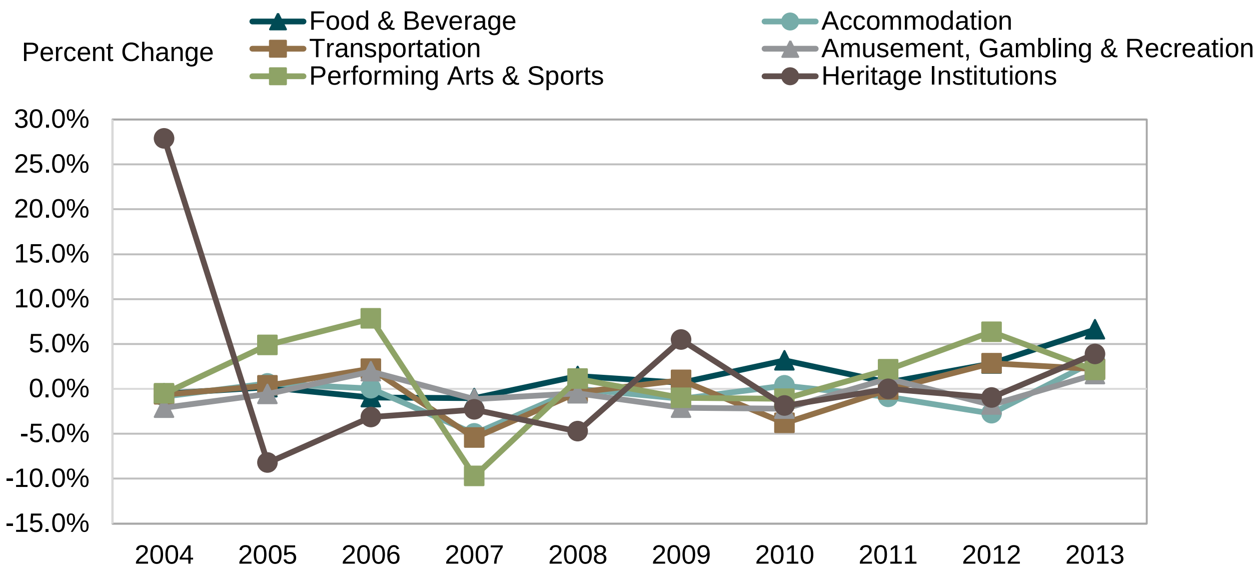
The performing arts & sports and food & beverage sectors experienced overall growth from 2004 to 2013 (by +11.5% and +13.6%, respectively). In 2007, all tourism sectors experienced a net decrease in the number of tourism businesses, but the decline was less pronounced in the food & beverage and amusement, gambling & recreation sectors, and heritage institutions (Figure 17). While the performing arts & sports sector experienced the largest decline in 2007, growth during the rest of the period has kept this sector in expansion. The number of heritage institutions spiked by +27.9% in 2004 (due to the provincial government devolving the management of 28

[16] The decrease in the number of tourism establishments in 2007 was attributed to the introduction of new "inactivation rules" in the redesigned Business Register to detect inactive businesses as early as possible, resulting in a more accurate reflection of the operating structure of businesses (http://ivt.crepuq.qc.ca/industries/documentation/brengl3.pdf).
[17] The data on tourism-related businesses is based on Statistics Canada's Business Register, which uses slightly different coding for sectors than revenue and GDP data.

heritage properties), and also grew in 2009 (by +5.5%) and 2013 (by +3.9%). Overall, the number of heritage institutions increased +12.6% between 2004 and 2013.

The number of businesses in both the accommodation and transportation sectors declined between 2004 and 2013 (-6.4% and -2.0%, respectively), in large part due to declines in 2007 (and in 2012 for the accommodation sector). Other than slight growth in 2006, 2011, and 2013 (by +1.9%, +1.1% and +1.6%, respectively), the amusement, gambling and recreation sector also slowly declined between 2004 and 2013, for an overall change of -5.7%. For more information, see Table 9, page 36.

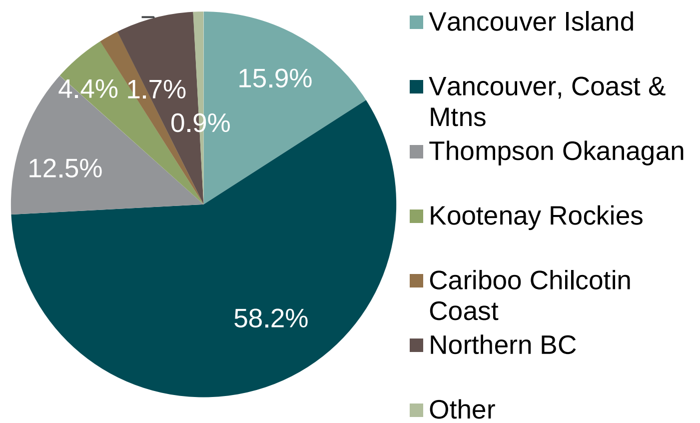
FIGURE 17: TOURISM BUSINESS GROWTH RATES BY SECTOR (2004 TO 2013)



Tourism businesses by region

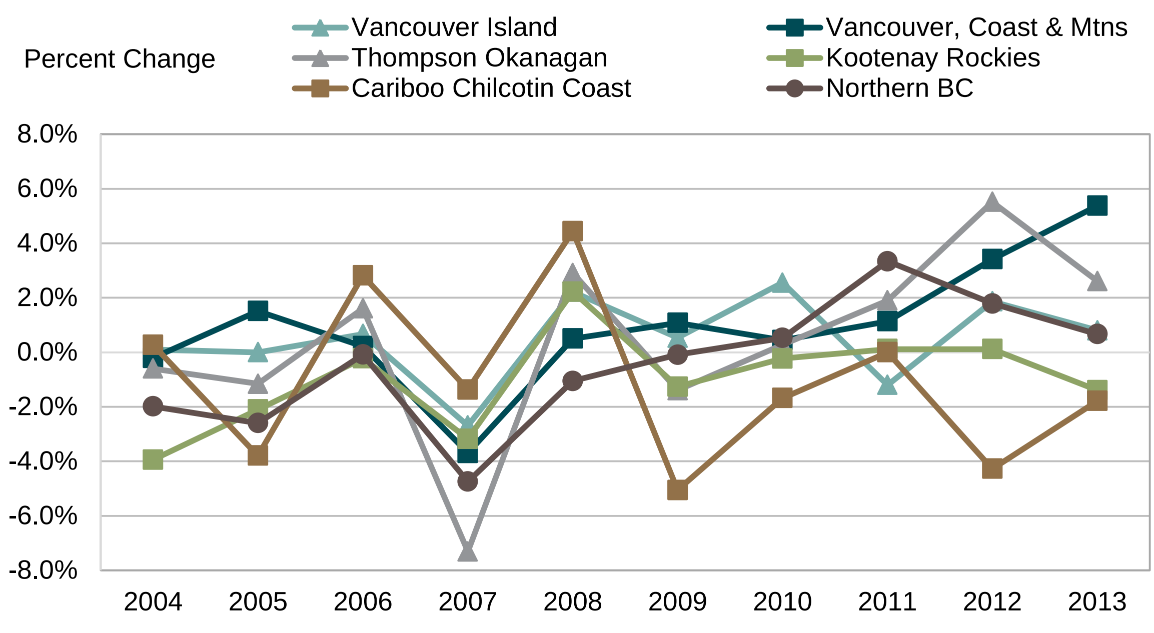
More than half of British Columbia's tourism-related businesses are located in the Vancouver, Coast & Mountains region (Figure 18). Combined, Vancouver, Coast & Mountains, Vancouver Island, and the Thompson Okanagan accounted for 86.6% of British Columbia's tourism establishments.

FIGURE 18: SHARE OF 2014 TOURISM BUSINESSES BY REGION



From 2004 to 2013, the number of tourism businesses increased by +10.2% in the Vancouver, Coast & Mountains region, +4.7% in the Vancouver Island region, and +4.5% in the Thompson Okanagan region. The Cariboo Chilcotin Coast (-10.6%), the Kootenay Rockies (-5.9%), and Northern BC (-2.4%) each experienced declines in the number of tourism businesses (Figure 19). For more information, see Table 10, page 37.

FIGURE 19: TOURISM BUSINESS GROWTH RATES BY REGION (2004 TO 2013)



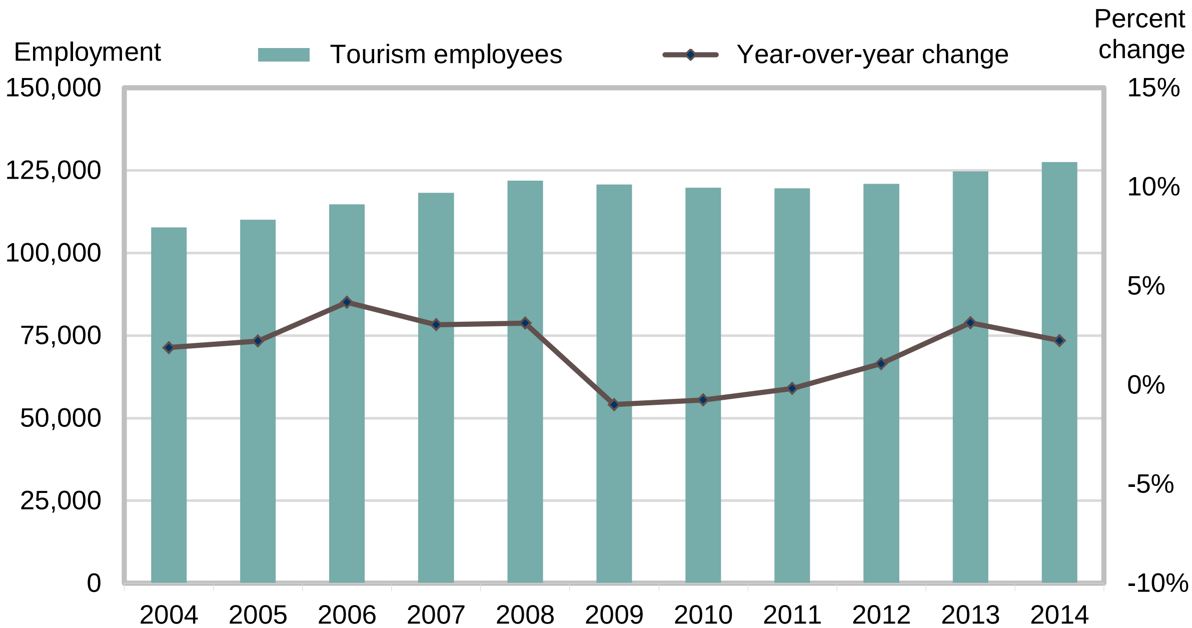
TOURISM EMPLOYMENT[18]

Direct employment

Direct tourism employment measures the number of people working in the four tourism-related industries due to tourism activities. Employment estimates are generated by assigning a percentage of total employment to the four related industries to tourism.

In 2014, British Columbia's tourism industry employment was estimated to be 127,500, a +2.2% increase from 2013 (Figure 20).[19] Since 2004, the number of people employed in the tourism industry has grown by +18.4%. The rate of growth has been increasing since 2012, with a slight decrease in 2014. For more information, see Table 1, page 30.

FIGURE 20: EMPLOYMENT IN THE TOURISM INDUSTRY AND YEAR-OVER-YEAR CHANGE (2004 TO 2014)



Tourism employment by sector

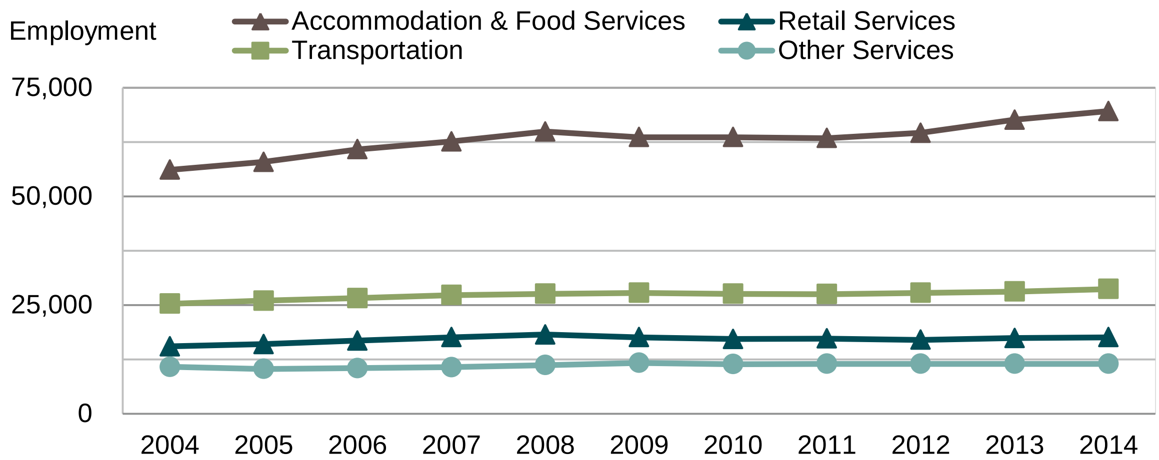
The accommodation & food services sector accounted for over half (54.6%) of all tourism employment in British Columbia, while the transportation sector accounted for nearly a quarter (22.5%) (Figure 21).

Since 2004, the number of employees has grown by +13.5% in the retail services, +24.1% in the accommodation & food services, +13.4% in the transportation sector, and by +6.5% in other services. For more information, see Table 11, page 39.

[18] Regional breakdowns of employment are not available. It is anticipated that these breakdowns will be available in next years' report.

[19] Tourism employment estimates are developed from Statistics Canada's Survey of Employment, Payroll and Hours (SEPH), and are derived from information on payroll deductions. SEPH may under-report employment, as it does not include self-employed workers, who do not make payroll deductions. The Labour Force Survey also collects employment data, and the individual coding estimates are available; however, the coding by industry is less reliable than SEPH, so industry breakdowns are less accurate.

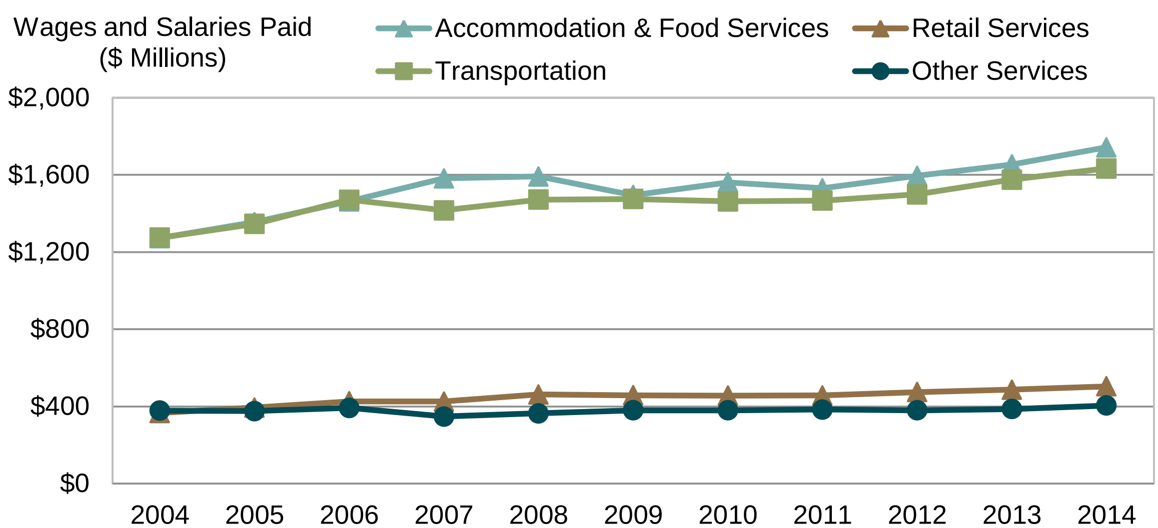
FIGURE 21: TOURISM EMPLOYMENT BY SECTOR (2004 TO 2014)



Wages and salaries

The tourism industry paid $4.3 billion in wages and salaries in 2014. Compared to 2013, the number of employees and employees' earnings have increased +2.2% and +4.5%, respectively (Figure 22).

Tourism wages and salaries increased +30.3% since 2004. From 2004 through 2008, earnings continued to grow by an average of +4.7% per year. Wages and salaries dropped during the 2009 economic downturn, but picked up again



in 2010. For more information, see Table 1, page 30.

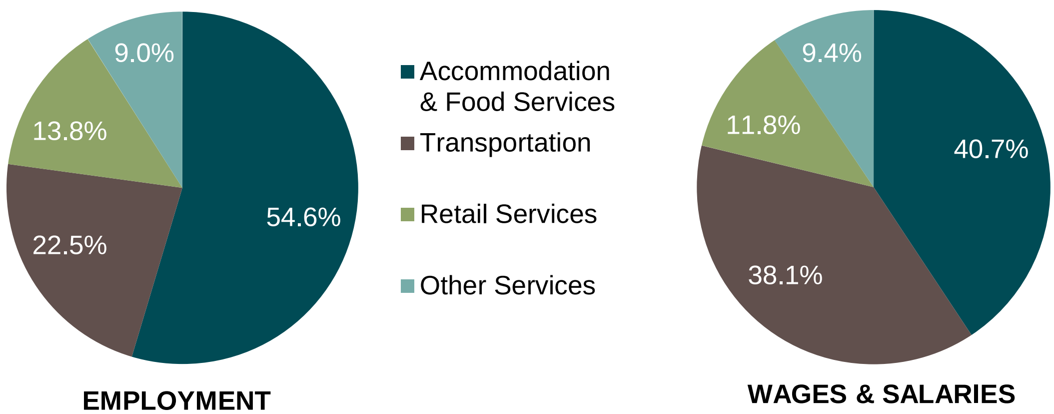
FIGURE 22: WAGES & SALARIES PAID IN THE INDUSTRY (2004 TO 2014)

Tourism salaries by sector

As noted earlier, the accommodation & food services sector comprises more than half of all tourism businesses (56.0%) and employs 54.6% of tourism workers, however just

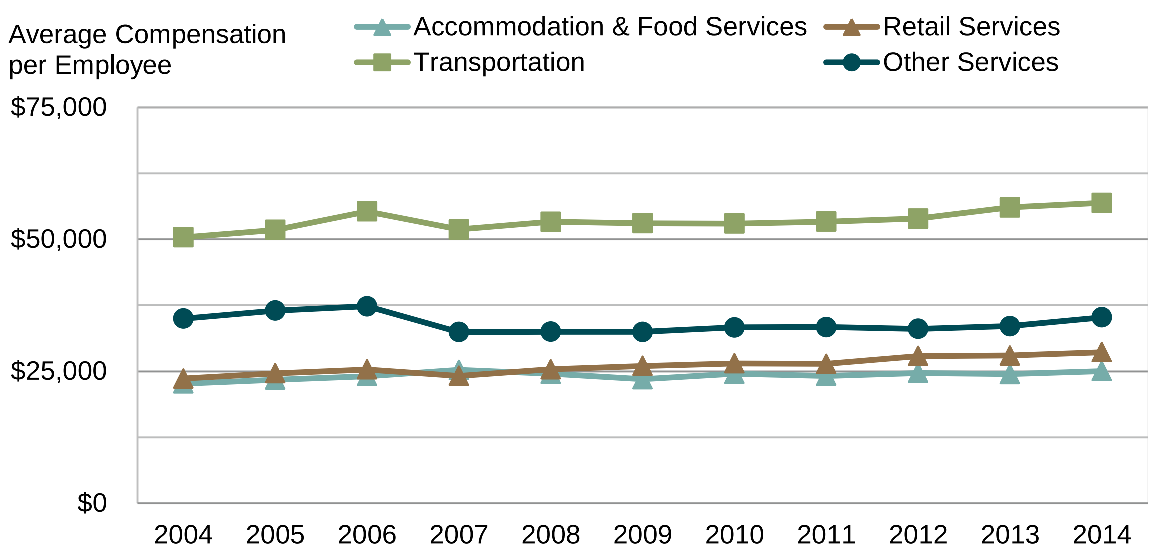
40.7% of tourism wages and salaries are earned through this sector. In contrast, the transportation sector accounts for 18.2% of tourism businesses, employs 22.5% of tourism workers, and accounting for 38.1% of tourism earnings (Figure 23). For more information, see Table 13, page 41.

FIGURE 23: SHARE OF 2014 TOURISM EMPLOYMENT AND SALARIES BY SECTOR



Average employee compensation grew by +2.2% in 2014 over 2013 reaching $34,000. While the average compensation per employee in all tourism sectors has increased since 2004 (by +10.0%), the 2014 average compensation within transportation was more than double that of the accommodation & food sector (Figure 24). Since 2004, growth in average earnings has been highest in retail services (+21.3% increase in the ten-year period), followed by transportation services (+12.9%), then accommodation & food services (+10.4%), and finally other service (+0.6%).

FIGURE 24: AVERAGE COMPENSATION PER EMPLOYEE BY SECTOR (2004 TO 2014)



4. Market of origin

Visitor market of origin data is captured through visitor surveys. Destination British Columbia relies on two surveys[20] conducted by Statistics Canada:

- International Travel Survey (ITS): an exit survey for some international visitors and an entry and online follow up survey for others.
- Travel Survey of Residents of Canada (TSRC): a monthly telephone survey of Canadian households.

These surveys ask respondents to report the number of trips, destinations visited and trip length, and to estimate overall trip expenditures. There are limitations in the reliability of visitor surveys, as the surveys depend on respondents' ability to recall and report data accurately. Also, differences in survey methodologies (different survey modes, differences in trip or traveller definitions) may affect visitor volume or expenditure/revenue[21] estimates.

There are differences in estimates of tourism expenditures/revenues between Statistics Canada (demand-side estimates) and BC Stats methodology (supply-side estimates), which can be attributed to several factors:

- Same-day travellers to British Columbia are not included in the analysis of Statistics Canada surveys.
- Some overnight tourism trips are considered "out of scope" for the ITS and TSRC, and thus not captured in these surveys.
- Travel by residents of the territories is not captured by the TSRC.
- Trips by Canadians that include a component in British Columbia but have a destination outside Canada are not included in the TSRC.
- Pre-trip expenditures on goods or services for tourism purposes are not included in the TSRC.
- Respondents to telephone surveys, such as the TSRC, may under-report the number of trips and trip expenditures to reduce interview times or may fail to recall trips or trip details. Similarly, respondents to intercept surveys, such as the ITS, may under-report trip expenditures, due to memory lapses.

Therefore, components of the market of origin data presented here should be interpreted with some caution.

This section summarizes visitor volume of overnight travellers to British Columbia (i.e., one or more nights were spent in British Columbia) by domestic, international, and all travellers to British Columbia. Visitors within British Columbia include British Columbia residents, other Canadian residents, and international visitors. Visitors may be travelling for leisure, business, or educational purposes. This section also reports tourism expenditures by origin from the visitor surveys to provide a more complete picture of British Columbia's tourism markets.

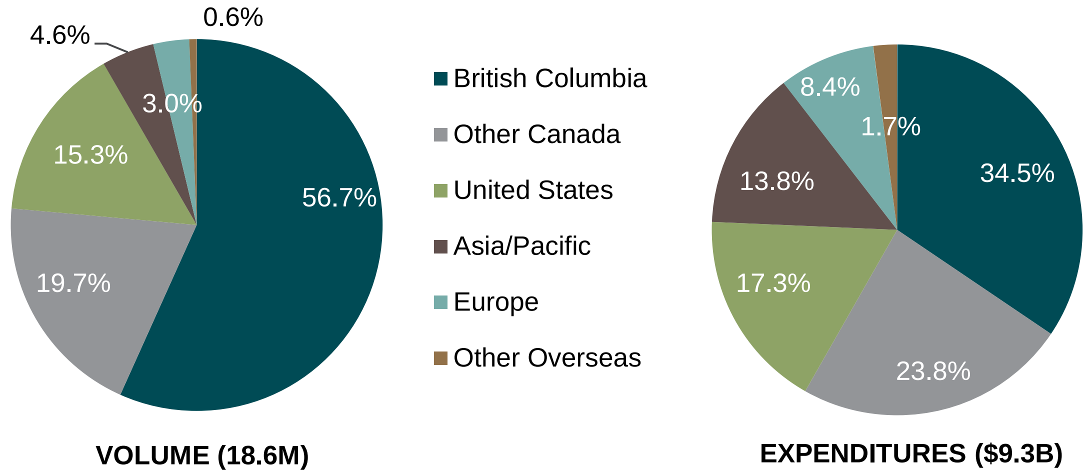
[20] Please visit Statistics Canada's website for more information on the ITS Frontier counts, the ITS intercept and follow-up questionnaires and air exit surveys, as well as the TSRC questionnaire.

Detailed tables of market of origin are available in Appendix A; Tables 1, and 14 through 19 are specific to the information covered in this section.

Overall visitor volume and expenditures

In 2014, there were approximately 18.6 million overnight visitors in British Columbia who spent $9.6 billion[22]. Over half of the visitors (56.7%) were British Columbia residents (Figure 25). Visitors from other parts of Canada accounted for 19.7% of all visits and international visitors accounted for the remaining 20.5% of visitor volume. While British Columbia residents made up the largest share of visitor volume, international visitors made up 40.6% of visitor expenditures. British Columbia residents accounted for 34.5% of visitor expenditures and other Canadian residents accounted for the remaining 23.8%.

FIGURE 25: OVERALL VISITOR VOLUME AND EXPENDITURES BY MARKET OF ORIGIN (2014)

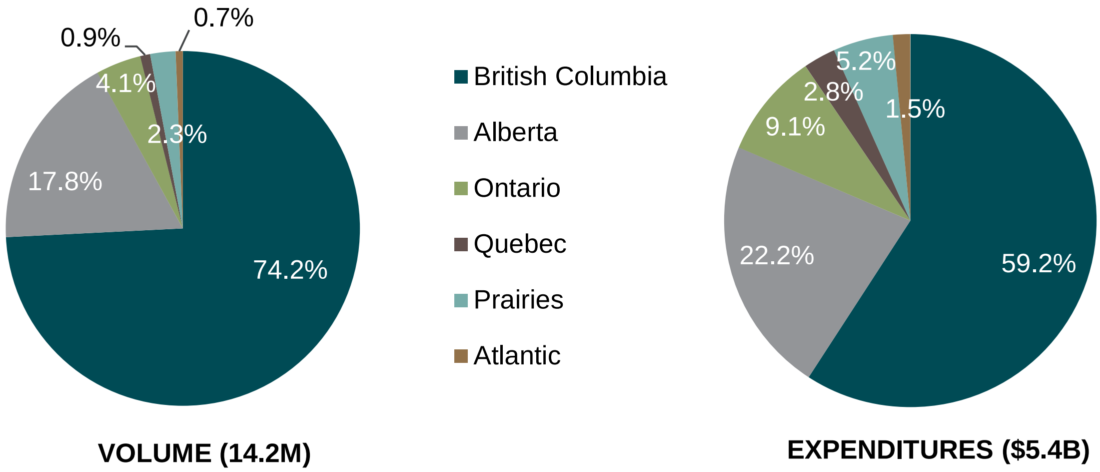


Domestic visitor volume and expenditures

Overnight visitors from Canada accounted for an estimated 14.2 million overnight visitors in 2014, a decrease of -3.1% from 2013. Of travellers from Canada, British Columbia residents made up the largest share of visitor volume (74.2%) and expenditures (59.2%) in 2014 (Figure 26). Alberta was the second largest domestic market of overnight visitors to British Columbia, representing 17.8% of the Canadian visitor volume and 22.2% of expenditures. Overall, visitors from Canada spent an estimated -4.1% less in 2014 than in 2013, spending $5.4 billion in tourism-related expenditures in 2014.

[22] Source of domestic data: Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC). Methodological changes to the Travel Survey of Residents of Canada do not allow comparisons before 2011.

FIGURE 26: SHARE OF 2014 DOMESTIC VISITOR VOLUME AND EXPENDITURES BY MARKET OF ORIGIN



In 2014, the estimated number of visitors from Alberta and Ontario decreased by -8.5% and -13.3%, respectively over 2013 and their estimated expenditures decreased by -20.7% and -9.3%, respectively over 2013. Compared to 2013, visitor volume from the Prairies increased by +2.2% in 2014 and their expenditures increased by +16.0%.

The growth of visitor volume from Quebec increased +5.8% over 2013 and expenditures have grown at a modest rate of +0.3% over 2013.

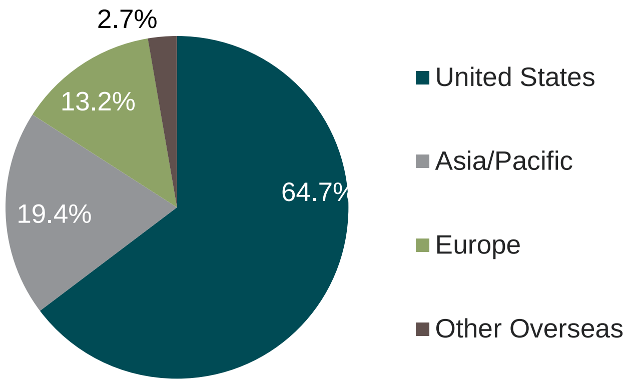
Visitor volume from Atlantic Provinces increased +78.8% over 2013, while expenditures grew +14.2% in 2014 over 2013.

International visitor volume and expenditures[23]

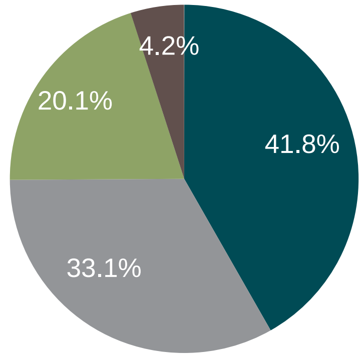
In 2014, 4.4 million international overnight visitors came to British Columbia and spent approximately $3.9 billion. The United States was the largest overnight international market for British Columbia, comprising 64.7% of international visitor volume and 41.8% of expenditures in 2014 (Figure 27). Asia/Pacific was the second largest market, comprising 19.4% of visitor volume and 33.1% of expenditures. Europe was the third largest market, comprising 13.2% of visitor volume and 20.1%. Other overseas markets account for the remaining portion (2.7% of visitor volume and 4.2% of expenditures).

[23] A methodological change occurred for international visitor volume and expenditures between 2012 and 2013. As a result of this change, 2013 and 2014 international visitor volume and expenditure data cannot be compared to years prior.

FIGURE 27: SHARE OF 2014 INTERNATIONAL VISITOR VOLUME AND EXPENDITURES BY MARKET OF ORIGIN



VOLUME (4.4M)



EXPENDITURES ($3.9B)

From 2004 to 2012, a decrease of United States visitors was seen each year with the exception of a slight increase in 2010 (+1.9%) and 2012 (+1.3%). United States visitor expenditures reached $1.6 billion in 2014 (Figure 28 and 29). Within the United States, Washington and California were British Columbia's largest markets, representing 58.5% of United States visitor volume and 46.5% of expenditures in 2013. For more information, see tables 1 and 17 through 20.

In 2014, the number of visitors from the Asia/Pacific totaled 851,000 and expenditures nearly reached $1.3 billion. Australia and China represented the largest portions of the Asia/Pacific market volume, 23.4% and 26.0%, respectively. These two markets constitute 32.5% and 25.3% of the total market expenditures.

Visitor volume from Europe reached 580,000 in 2014, 13.2% of the international market share. Visitors from Europe spent approximately $785 million in 2013, 20.1% of the international market share. Most major European markets experienced declines during the economic downturn in 2009, but rebounded in 2010. The United Kingdom was the largest European market in 2014, representing over a third of the European volume (41.2%), and contributing $361 million in expenditures (46.0% of European total). Germany was the second largest European market in 2014, representing 17.3% of European visitors and contributing $144 million in expenditures (18.4% of European total).

Visitor volume from Mexico grew steadily from 2004 through 2008 to 82,000 visitors. Volume dropped in 2009 and 2010 due to the introduction of the visa requirements for Mexican visitors, stabilized in 2011 and grew to 57,000 in 2012. Mexico visitor expenditures have followed the same path as that of volume, with annual growth from 2004 through 2008 to $96 million. This growth was followed by a -7.3% decline in 2009, a -24.9% decline in 2010, but stabilization in 2011, a substantial growth in 2012 (+35.2%), and finally a major decline in 2014 (-34.7%). Expenditures from the Mexico market have shown substantial growth between 2004 and 2012 (+19.8%). In 2014, Mexico visitor volume was 46,000 (1.1% of total international visitation), and contributes $59 million (1.5% of total international expenditures).

FIGURE 28: INTERNATIONAL VISITOR VOLUME GROWTH RATES BY MARKET OF ORIGIN (2004 TO 2014)

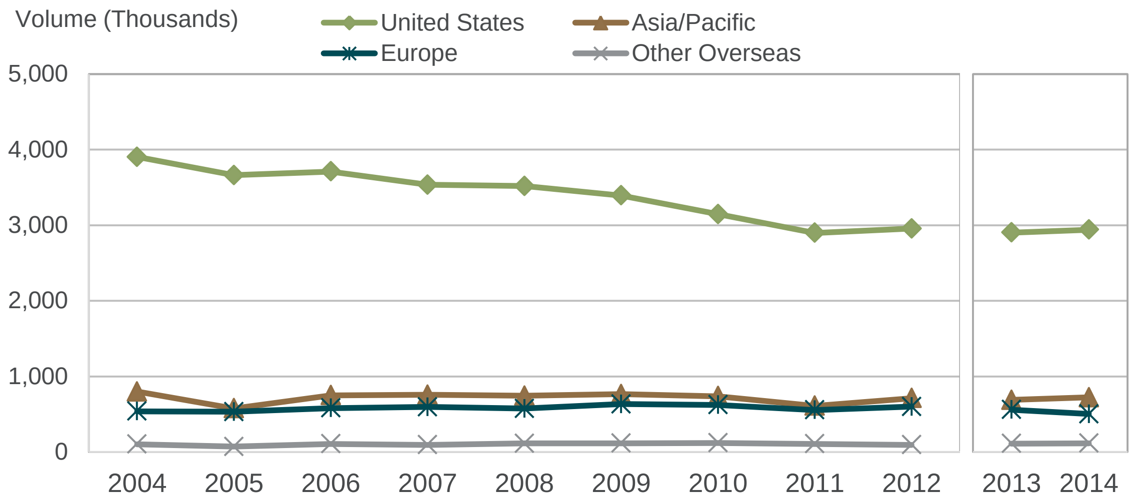
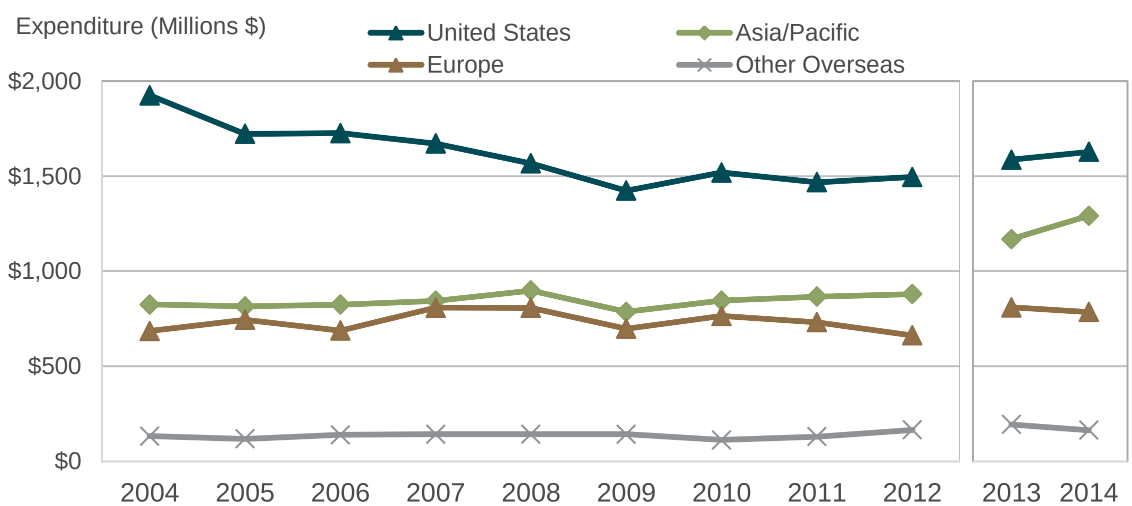


FIGURE 29: INTERNATIONAL VISITOR EXPENDITURE GROWTH RATES BY MARKET OF ORIGIN (2004 TO 2014)



5. Summary

This report presents the economic value of tourism in British Columbia through measures of revenue generated (whether that be revenue from provincial taxes, accommodation room revenue, exports or other areas), gross domestic product, tourism-related businesses in operation, tourism employment, wages and salaries paid in the tourism industry (including average compensation), and visitor volume and associated expenditures by both domestic and international market of origins.

Tourism Indicators	2014	% Change from 2013	% Change from 2004
Total Tourism Revenue	$14.6B	↑ +5.1%	↑ +37.7%
Accommodation Room Revenue	$1.7B	↑ +9.0%	↑ +12.2% (2010)
Provincial Tax Revenue	$825.0M	↓ -7.6%	↑ +13.2%
Export Revenue	$3.9B	↑ +3.7%	N/A
Gross Domestic Product (2007 constant dollars)	$7.1B	↑ +4.5%	+13.1% (2007)
Tourism-Related Businesses	18,682	N/A	N/A
Tourism Employment	127,500	↑ +2.2%	↑ +18.4%
Tourism Wages & Salaries	$4.3B	↑ +4.5%	↑ +30.3%
Average Tourism Compensation	$34K	↑ +2.2%	↑ +10.0%
Domestic Visitor Volume	14.2M	↓ -3.1%	N/A
Domestic Visitor Expenditures	$5.4B	↓ -4.1%	N/A
International Visitor Volume	4.4M	↑ +0.9%	N/A
International Visitor Expenditures	$3.9B	↑ +3.7%	N/A

APPENDIX A

Detailed Tables

6. Appendix A: Detailed Tables

TABLE 1: SUMMARY OF KEY ECONOMIC INDICATORS FOR THE TOURISM INDUSTRY AND YEAR-OVER-YEAR CHANGE

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Total revenue ($ millions)	$10,590	$11,390	$12,179	$12,895	$13,275	$12,396	$12,931	$13,085	$13,425	$13,877	$14,582
% change	*9.5%*	*7.6%*	*6.9%*	*5.9%*	*2.9%*	*-6.6%*	*4.3%*	*1.2%*	*2.6%*	*3.4%*	*5.1%*
Total provincial taxes ($ millions)	$729	$764	$827	$847	$821	$735	$853	$998	$1,036	$893	$825
% change	8.6%	4.8%	8.2%	2.4%	-3.1%	-10.5%	16.1%	17.0%	3.8%	-13.8%	-7.6%
Tourism export revenue ($ millions)	$3,568	$3,399	$3,376	$3,466	$3,414	$3,049	$3,240	$3,194	$3,201	$3,758	$3,898
% change	*11.0%*	*-4.7%*	*-0.7%*	*2.6%*	*-1.5%*	*-10.7%*	*6.3%*	*-1.4%*	*0.2%*	N/A	*3.7%*
Gross Domestic Product (GDP; $2007 millions)				$6,312	$6,337	$6,244	$6,503	$6,550	$6,669	$6,833	$7,140
% change					*0.4%*	*-1.5%*	*4.1%*	*0.7%*	*1.8%*	*2.5%*	*4.5%*
Total businesses	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,044	18,533	19,254	18,682
% change	*-0.4%*	*0.3%*	*0.5%*	*-2.9%*	*0.6%*	*0.2%*	*0.7%*	*0.6%*	*2.7%*	*3.9%*	N/A
Tourism employment (‘000s)	107.7	110.1	114.7	118.2	121.9	120.7	119.8	119.6	120.9	124.7	127.5
% change	*1.9%*	*2.2%*	*4.2%*	*3.1%*	*3.1%*	*-1.0%*	*-0.7%*	*-0.2%*	*1.1%*	*3.1%*	*2.2%*
Wages and salaries ($ millions)	$3,290	$3,470	$3,752	$3,769	$3,890	$3,808	$3,861	$3,839	$3,947	$4,101	$4,286
% change	*6.3%*	*5.5%*	*8.1%*	*0.5%*	*3.2%*	*-2.1%*	*1.4%*	*-0.6%*	*2.8%*	*3.9%*	*4.5%*
International visitors (‘000s)	5,149	4,983	4,951	4,911	4,630	4,175	4,364	4,262	4,282	4,350	4,390
% change	*6.3%*	*-3.2%*	*-0.6%*	*-0.8%*	*-5.7%*	*-9.8%*	*4.5%*	*-2.3%*	*0.5%*	N/A	*0.9%*

Source: BC Stats for all except international visitors (source: Statistics Canada).
Note: 2012, 2013, and 2014 revenue data and associated taxes are preliminary and subject to revision.
Note: Provincial taxes include income, hotel, gas, and other taxes.
Note: Changes in methodology by Statistics Canada in 2013 created a break in trend data for tourism export revenue and thus the level of tourism export revenue in 2013 and 2014 cannot be compared directly to prior years.
Note: Pre-2007 real GDP data is not available; data is in 2007 constant dollars.
In 2014, BC Stats implemented a new methodology regarding how information is reported in the Business Register. This new methodology has not been applied retroactively, and as a result, 2014 data cannot be compared to years prior.
Note: A methodological change occurred for international visitor volume between 2012 and 2013. As a result of this change, 2013 and 2014 international visitor volume and expenditure data cannot be compared to years prior.

Table 2: Tourism revenue and year-over-year change by sector

	Sectors	2004	2005	2006	2007	2008	2009	2010	2011	2012p	2013p	2014p
Revenue ($ millions)	Accommodation & food services	$3,815	$4,155	$4,452	$4,692	$4,637	$4,285	$4,456	$4,371	$4,420	$4,645	$5,067
	Transportation services	$3,119	$3,463	$3,711	$3,872	$3,963	$3,618	$3,878	$4,023	$4,230	$4,393	$4,481
	Retail services	$2,754	$2,924	$3,138	$3,396	$3,615	$3,432	$3,522	$3,656	$3,728	$3,800	$3,970
	Other services	$902	$848	$878	$935	$1,061	$1,061	$1,074	$1,035	$1,048	$1,040	$1,064
	Overall	**$10,590**	**$11,390**	**$12,179**	**$12,895**	**$13,275**	**$12,396**	**$12,931**	**$13,085**	**$13,425**	**$13,877**	**$14,582**
% change	Accommodation & food services	*11.3%*	*8.9%*	*7.1%*	*5.4%*	*-1.2%*	*-7.6%*	*4.0%*	*-1.9%*	*1.1%*	*5.1%*	*9.1%*
	Transportation services	*7.0%*	*11.0%*	*7.2%*	*4.3%*	*2.4%*	*-8.7%*	*7.2%*	*3.7%*	*5.1%*	*3.9%*	*2.0%*
	Retail services	*7.0%*	*6.2%*	*7.3%*	*8.2%*	*6.4%*	*-5.1%*	*2.6%*	*3.8%*	*2.0%*	*1.9%*	*4.5%*
	Other services	*19.5%*	*-6.0%*	*3.5%*	*6.5%*	*13.5%*	*0.0%*	*1.2%*	*-3.6%*	*1.3%*	*-0.8%*	*2.3%*
	Overall	***9.5%***	***7.6%***	***6.9%***	***5.9%***	***2.9%***	***-6.6%***	***4.3%***	***1.2%***	***2.6%***	***3.4%***	***5.1%***

Source: BC Stats.
Note: 2012, 2013, and 2014 revenue data are preliminary and subject to revision.

TABLE 3: COMPARING EXPORT REVENUES FOR BC'S PRIMARY COMMODITIES IN MILLIONS

BC Primary Commodities	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Forest industry	$15,081	$14,134	$13,560	$12,282	$10,107	$7,602	$9,143	$9,985	$10,159	$11,654	$12,397
Wood products	$10,062	$9,485	$8,776	$7,164	$5,408	$4,127	$5,106	$5,706	$6,175	$7,746	$8,132
Pulp and paper products	$5,019	$4,649	$4,784	$5,118	$4,699	$3,475	$4,037	$4,279	$3,985	$3,908	$4,265
Agriculture & fish	$2,416	$2,371	$2,422	$2,332	$2,484	$2,424	$2,524	$2,512	$2,720	$2,912	$3,217
Agriculture and food	$1,442	$1,386	$1,443	$1,435	$1,585	$1,555	$1,579	$1,613	$1,867	$2,038	$2,253
Fish products	$974	$985	$978	$897	$899	$869	$945	$898	$853	$873	$964
Metallic mineral products	$2,089	$2,705	$3,581	$3,430	$3,336	$2,503	$3,163	$3,492	$3,456	$3,834	$4,566
Energy products	$4,549	$7,801	$6,455	$6,196	$9,623	$6,864	$7,996	$10,024	$8,085	$7,957	$7,803
Tourism industry	$3,568	$3,399	$3,376	$3,466	$3,414	$3,049	$3,240	$3,194	$3,201	$3,758	$3,898

Source: BC Stats.
Note: Changes in methodology by Statistics Canada in 2013 created a break in trend data for tourism export revenue and thus the level of tourism export revenue in 2013 and 2014 cannot be compared directly to prior years.

TABLE 4: ACCOMMODATION ROOM REVENUE BY COMMUNITY

	Market*	2010	2011	2012	2013	2014
MRDT Revenue	Fernie	$13,103	$14,842	$15,255	$16,588	$15,809
	% change		*13.3%*	*2.8%*	*8.7%*	*-4.7%*
	Kamloops	$42,813	$47,037	$44,966	$48,526	$50,401
	% change		*9.9%*	*-4.4%*	*7.9%*	*3.9%*
	Kelowna	$68,700	$67,661	$70,406	$74,988	$82,542
	% change		*-1.5%*	*4.1%*	*6.5%*	*10.1%*
	Parksville	$17,871	$17,023	$17,675	$17,698	$19,390
	% change		*-4.7%*	*3.8%*	*0.1%*	*9.6%*
	Penticton	$20,821	$21,412	$22,509	$23,350	$24,611
	% change		*2.8%*	*5.1%*	*3.7%*	*5.4%*
	Prince George	$28,804	$34,498	$35,289	$37,706	$40,290
	% change		*19.8%*	*2.3%*	*6.9%*	*6.9%*
	Prince Rupert	$7,683	$8,176	$8,749	$11,493	$11,622
	% change		*6.4%*	*7.0%*	*31.4%*	*1.1%*
	Revelstoke	$15,724	$17,284	$20,105	$21,938	$24,072
	% change		*9.9%*	*16.3%*	*9.1%*	*9.7%*
	Richmond	$149,073	$150,226	$133,156	$135,751	$147,306
	% change		*0.8%*	*-11.4%*	*1.9%*	*8.5%*
	Tofino	$33,882	$32,936	$33,098	$35,188	$38,749
	% change		*-2.8%*	*0.5%*	*6.3%*	*10.1%*
	Vancouver	$557,407	$520,663	$533,465	$544,209	$593,809
	% change		*-6.6%*	*2.5%*	*2.0%*	*9.1%*
	Victoria	$125,586	$126,619	$123,157	$134,048	$138,873
	% change		*0.8%*	*-2.7%*	*8.8%*	*3.6%*
	Whistler	$191,651	$158,933	$176,611	$188,723	$206,391
	% change		*-17.1%*	*11.1%*	*6.9%*	*9.4%*
	COMMUNITIES (ABOVE)	**$1,273,118**	**$1,217,310**	**$1,234,441**	**$1,290,206**	**$1,393,865**
	% change		***-4.4%***	***1.4%***	***4.5%***	***8.0%***
	OVERALL BC	**$1,553,115**	**$1,494,972**	**$1,518,420**	**$1,599,357**	**$1,742,832**
	% change		***-3.7%***	***1.6%***	***5.3%***	***9.0%***

Source: BC Stats.
Note: List is not exhaustive; a sample of 13 of the total 49 participating communities have been selected. For more information see BC Stats website: http://www.bcstats.gov.bc.ca/StatisticsBySubject/BusinessIndustry/Tourism.aspx

TABLE 5: TOURISM GDP USING 2007 DOLLARS AND YEAR-OVER-YEAR CHANGE BY SECTOR

	Sectors	2007	2008	2009	2010	2011	2012	2013	2014
GDP ($ millions)	Accommodation & food services	$2,599	$2,562	$2,507	$2,593	$2,594	$2,630	$2,722	$2,839
	Transportation services	$1,878	$1,928	$1,896	$2,053	$2,094	$2,140	$2,167	$2,304
	Retail services	$785	$753	$732	$732	$737	$762	$776	$807
	Other services	$1,051	$1,094	$1,110	$1,126	$1,124	$1,137	$1,168	$1,190
	Overall	**$6,312**	**$6,337**	**$6,244**	**$6,503**	**$6,550**	**$6,669**	**$6,833**	**$7,140**
% change	Accommodation & food services		*-1.4%*	*-2.1%*	*3.4%*	*0.0%*	*1.4%*	*3.5%*	*4.3%*
	Transportation services		*2.7%*	*-1.7%*	*8.3%*	*2.0%*	*2.2%*	*1.3%*	*6.3%*
	Retail services		*-4.1%*	*-2.8%*	*0.0%*	*0.7%*	*3.4%*	*1.8%*	*4.0%*
	Other services		*4.1%*	*1.5%*	*1.4%*	*-0.2%*	*1.2%*	*2.7%*	*1.9%*
	Overall		***0.4%***	***-1.5%***	***4.1%***	***0.7%***	***1.8%***	***2.5%***	***4.5%***

Source: BC Stats.
Note: Pre-2007 real GDP data is not available. GDP data is in 2007 constant dollars.

TABLE 6: COMPARING GDP OF TOURISM SECTORS USING AN INDEX (2007 = 100)

Sectors	2007	2008	2009	2010	2011	2012	2013	2014
Accommodation & food services	100	99	96	100	100	101	105	109
Transportation services	100	103	101	109	112	114	115	123
Retail services	100	96	93	93	94	97	99	103
Other services	100	104	106	107	107	108	111	113
Tourism industry	**100**	**100**	**99**	**103**	**104**	**106**	**108**	**113**

Source: BC Stats.
Note: Pre-2007 real GDP data is not available.

TABLE 7: COMPARING GDP OF BC PRIMARY RESOURCE INDUSTRIES (2007 = 100)

Industries		2007	2008	2009	2010	2011	2012	2013	2014
GDP ($ millions)	Agriculture	$1,240	$1,194	$1,273	$1,321	$1,325	$1,310	$1,366	$1,383
	Forestry	$2,026	$1,787	$1,230	$1,511	$1,788	$1,833	$2,008	$1,819
	Mining, oil & gas extraction	$9,910	$10,192	$9,127	$10,383	$11,146	$10,813	$11,600	$12,284
	Tourism	$6,312	$6,337	$6,244	$6,503	$6,550	$6,669	$6,833	$7,140
Index (2007 = 100)	Agriculture	100	96	103	107	107	106	110	111
	Forestry	100	88	61	75	88	91	99	90
	Mining, oil & gas extraction	100	103	92	105	112	109	117	124
	Tourism	100	100	99	103	104	106	108	113

Source: BC Stats.
Note: Pre-2007 real GDP data is not available.

TABLE 8: TOURISM ESTABLISHMENTS AND YEAR-OVER-YEAR CHANGE BY BUSINESS SIZE

	Business size	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Establishments	1 to 4 employees	7,995	8,177	8,256	6,179	6,121	6,177	6,208	6,235	6,435	6,525	6,014
	5 to 9 employees	3,266	3,133	3,170	3,886	3,816	3,823	3,830	3,941	4,049	4,205	4,091
	10 to 19 employees	3,007	2,980	2,937	3,538	3,687	3,684	3,576	3,667	3,692	3,840	3,790
	20 to 49 employees	2,408	2,454	2,438	2,691	2,744	2,744	2,949	2,920	2,973	3,201	3,248
	50 to 199 employees	1,221	1,204	1,220	1,230	1,248	1,230	1,226	1,157	1,248	1,322	1,374
	200 or more employees	138	146	166	138	158	156	154	124	136	161	165
	Overall	**18,035**	**18,094**	**18,187**	**17,662**	**17,774**	**17,814**	**17,943**	**18,044**	**18,533**	**19,254**	**18,682**
% change	1 to 4 employees	*-3.7%*	*2.3%*	*1.0%*	*-25.2%*	*-0.9%*	*0.9%*	*0.5%*	*0.4%*	*3.2%*	*1.4%*	*N/A*
	5 to 9 employees	*1.0%*	*-4.1%*	*1.2%*	*22.6%*	*-1.8%*	*0.2%*	*0.2%*	*2.9%*	*2.7%*	*3.9%*	*N/A*
	10 to 19 employees	*-1.0%*	*-0.9%*	*-1.4%*	*20.5%*	*4.2%*	*-0.1%*	*-2.9%*	*2.5%*	*0.7%*	*4.0%*	*N/A*
	20 to 49 employees	*7.7%*	*1.9%*	*-0.7%*	*10.4%*	*2.0%*	*0.0%*	*7.5%*	*-1.0%*	*1.8%*	*7.7%*	*N/A*
	50 to 199 employees	*3.7%*	*-1.4%*	*1.3%*	*0.8%*	*1.5%*	*-1.4%*	*-0.3%*	*-5.6%*	*7.9%*	*5.9%*	*N/A*
	200 or more employees	*8.7%*	*5.8%*	*13.7%*	*-16.9%*	*14.5%*	*-1.3%*	*-1.3%*	*-19.5%*	*9.7%*	*18.4%*	*N/A*
	Overall	***-0.4%***	***0.3%***	***0.5%***	***-2.9%***	***0.6%***	***0.2%***	***0.7%***	***0.6%***	***2.7%***	***3.9%***	***N/A***

Source: BC Stats.

Note: In 2014, Statistics Canada changed the way information was reported in the Business Register; as such 2014 data cannot be compared to years prior.

TABLE 9: TOURISM ESTABLISHMENTS AND YEAR-OVER-YEAR CHANGE BY SECTOR

	Sectors	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Establishments	Food & beverage	9,586	9,603	9,511	9,412	9,545	9,609	9,913	9,984	10,265	10,944	10,453
	Accommodation	2,015	2,027	2,028	1,927	1,927	1,906	1,913	1,896	1,844	1,901	1,869
	Transportation	3,472	3,485	3,563	3,369	3,356	3,389	3,260	3,257	3,350	3,424	3,401
	Amusement, gambling & recreation	1,756	1,746	1,780	1,760	1,751	1,714	1,676	1,695	1,665	1,692	1,672
	Performing arts & sports	963	1,010	1,089	983	994	984	973	994	1,057	1,079	1,065
	Heritage institutions	243	223	216	211	201	212	208	208	206	214	222
	Overall	**18,035**	**18,094**	**18,187**	**17,662**	**17,774**	**17,814**	**17,943**	**18,034**	**18,387**	**19,254**	**18,682**
% change	Food & beverage	-0.5%	0.2%	-1.0%	-1.0%	1.4%	0.7%	3.2%	0.7%	2.8%	6.6%	N/A
	Accommodation	-0.8%	0.6%	0.0%	-5.0%	0.0%	-1.1%	0.4%	-0.9%	-2.7%	3.1%	N/A
	Transportation	-0.6%	0.4%	2.2%	-5.4%	-0.4%	1.0%	-3.8%	-0.1%	2.9%	2.2%	N/A
	Amusement, gambling & recreation	-2.1%	-0.6%	1.9%	-1.1%	-0.5%	-2.1%	-2.2%	1.1%	-1.8%	1.6%	N/A
	Performing arts & sports	-0.5%	4.9%	7.8%	-9.7%	1.1%	-1.0%	-1.1%	2.2%	6.3%	2.1%	N/A
	Heritage institutions	27.9%	-8.2%	-3.1%	-2.3%	-4.7%	5.5%	-1.9%	0.0%	-1.0%	3.9%	N/A
	Overall	**-0.4%**	**0.3%**	**0.5%**	**-2.9%**	**0.6%**	**0.2%**	**0.7%**	**0.5%**	**2.0%**	**4.7%**	**N/A**

Source: BC Stats.
Note: In 2014, Statistics Canada changed the way information was reported in the Business Register; as such 2014 data cannot be compared to years prior.

TABLE 10: TOURISM ESTABLISHMENTS AND YEAR-OVER-YEAR CHANGE BY REGION

	Region	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Establishments	Vancouver Island	2,994	2,994	3,014	2,933	2,998	3,014	3,091	3,054	3,111	3,136	2,974
	Vancouver, Coast & Mtns	10,169	10,323	10,346	9,964	10,014	10,122	10,167	10,283	10,634	11,206	10,880
	Thompson Okanagan	2,329	2,302	2,339	2,168	2,231	2,200	2,206	2,248	2,372	2,434	2,328
	Kootenay Rockies	903	884	882	854	873	862	860	861	862	850	820
	Cariboo Chilcotin Coast	369	355	365	360	376	357	351	351	336	330	304
	Northern BC	1,234	1,202	1,201	1,144	1,132	1,131	1,137	1,175	1,196	1,204	1,213
	Standard geographic coding not available	37	34	40	239	150	128	131	72	22	94	163
	Overall	**18,035**	**18,094**	**18,187**	**17,662**	**17,774**	**17,814**	**17,943**	**18,044**	**18,533**	**19,254**	**18,682**
% change	Vancouver Island	*0.1%*	*0.0%*	*0.7%*	*-2.7%*	*2.2%*	*0.5%*	*2.6%*	*-1.2%*	*1.9%*	*0.8%*	N/A
	Vancouver, Coast & Mtns	*-0.2%*	*1.5%*	*0.2%*	*-3.7%*	*0.5%*	*1.1%*	*0.4%*	*1.1%*	*3.4%*	*5.4%*	N/A
	Thompson Okanagan	*-0.6%*	*-1.2%*	*1.6%*	*-7.3%*	*2.9%*	*-1.4%*	*0.3%*	*1.9%*	*5.5%*	*2.6%*	N/A
	Kootenay Rockies	*-3.9%*	*-2.1%*	*-0.2%*	*-3.2%*	*2.2%*	*-1.3%*	*-0.2%*	*0.1%*	*0.1%*	*-1.4%*	N/A
	Cariboo Chilcotin Coast	*0.3%*	*-3.8%*	*2.8%*	*-1.4%*	*4.4%*	*-5.1%*	*-1.7%*	*0.0%*	*-4.3%*	*-1.8%*	N/A
	Northern BC	*-2.0%*	*-2.6%*	*-0.1%*	*-4.7%*	*-1.0%*	*-0.1%*	*0.5%*	*3.3%*	*1.8%*	*0.7%*	N/A
	Overall	***-0.4%***	***0.3%***	***0.5%***	***-2.9%***	***0.6%***	***0.2%***	***0.7%***	***0.6%***	***2.7%***	***3.9%***	**N/A**

Source: BC Stats.
Note: In 2014, Statistics Canada changed the way information was reported in the Business Register; as such 2014 data cannot be compared to years prior.

TABLE 11: TOURISM EMPLOYMENT AND YEAR-OVER-YEAR CHANGE BY SECTOR

	Sectors	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Employment	Accommodation & food services	56,100	57,900	60,800	62,600	64,900	63,600	63,600	63,400	64,600	67,600	69,600
	Retail services	15,500	16,000	16,800	17,600	18,200	17,600	17,200	17,300	17,000	17,400	17,600
	Transportation services	25,300	26,000	26,600	27,300	27,600	27,800	27,600	27,500	27,800	28,100	28,700
	Other services	10,800	10,300	10,500	10,700	11,200	11,700	11,400	11,500	11,500	11,500	11,500
	Overall	**107,700**	**110,100**	**114,700**	**118,200**	**121,900**	**120,700**	**119,800**	**119,600**	**120,900**	**124,700**	**127,500**
% change	Accommodation & food services	*0.7%*	*3.2%*	*5.0%*	*3.0%*	*3.7%*	*-2.0%*	*0.0%*	*-0.3%*	*1.9%*	*4.6%*	*3.0%*
	Retail services	*2.6%*	*3.2%*	*5.0%*	*4.8%*	*3.4%*	*-3.3%*	*-2.3%*	*0.6%*	*-1.7%*	*2.4%*	*1.1%*
	Transportation services	*1.6%*	*2.8%*	*2.3%*	*2.6%*	*1.1%*	*0.7%*	*-0.7%*	*-0.4%*	*1.1%*	*1.1%*	*2.1%*
	Other services	*8.0%*	*-4.6%*	*1.9%*	*1.9%*	*4.7%*	*4.5%*	*-2.6%*	*0.9%*	*0.0%*	*0.0%*	*0.0%*
	Overall	***1.9%***	***2.2%***	***4.2%***	***3.1%***	***3.1%***	***-1.0%***	***-0.7%***	***-0.2%***	***1.1%***	***3.1%***	***2.2%***

Source: BC Stats.

TABLE 12: TOURISM WAGES AND SALARIES AND YEAR-OVER-YEAR CHANGE BY SECTOR

	Sectors	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Wages & salaries ($ millions)	Accommodation & food services	$1,272	$1,355	$1,463	$1,582	$1,592	$1,495	$1,561	$1,531	$1,595	$1,654	$1,743
	Retail services	$366	$394	$426	$425	$462	$458	$456	$457	$474	$487	$504
	Transportation services	$1,275	$1,346	$1,471	$1,416	$1,472	$1,475	$1,463	$1,467	$1,499	$1,575	$1,633
	Other services	$378	$376	$392	$347	$364	$380	$380	$384	$380	$386	$405
	Overall	**$3,290**	**$3,470**	**$3,752**	**$3,769**	**$3,890**	**$3,808**	**$3,861**	**$3,839**	**$3,947**	**$4,101**	**$4,286**
% change	Accommodation & food services	*7.9%*	*6.5%*	*8.0%*	*8.1%*	*0.6%*	*-6.1%*	*4.4%*	*-1.9%*	*4.2%*	*3.7%*	*5.4%*
	Retail services	*7.3%*	*7.7%*	*8.1%*	*-0.2%*	*8.7%*	*-0.9%*	*-0.4%*	*0.2%*	*3.7%*	*2.7%*	*3.5%*
	Transportation services	*4.2%*	*5.6%*	*9.3%*	*-3.7%*	*4.0%*	*0.2%*	*-0.8%*	*0.3%*	*2.2%*	*5.1%*	*3.7%*
	Other services	*7.4%*	*-0.5%*	*4.3%*	*-11.5%*	*4.9%*	*4.4%*	*0.0%*	*1.1%*	*-1.0%*	*1.6%*	*4.9%*
	Overall	***6.3%***	***5.5%***	***8.1%***	***0.5%***	***3.2%***	***-2.1%***	***1.4%***	***-0.6%***	***2.8%***	***3.9%***	***4.5%***

Source: BC Stats.

TABLE 13: TOURISM EMPLOYEE COMPENSATION AND YEAR-OVER-YEAR CHANGE BY SECTOR

	Sectors	2004	2005	2006	2007	2008	2009	2010	2011	2012p	2013p	2014p
Average Compensation	Accommodation & food services	$22,674	$23,402	$24,063	$25,272	$24,530	$23,506	$24,544	$24,148	$24,690	$24,467	$25,043
	Transportation services	$50,395	$51,769	$55,301	$51,868	$53,333	$53,058	$53,007	$53,345	$53,921	$56,050	$56,899
	Retail services	$23,613	$24,625	$25,357	$24,148	$25,385	$26,023	$26,512	$26,416	$27,882	$27,989	$28,636
	Other services	$35,000	$36,505	$37,333	$32,430	$32,500	$32,479	$33,333	$33,391	$33,043	$33,565	$35,217
	Overall	**$30,548**	**$31,517**	**$32,711**	**$31,887**	**$31,911**	**$31,549**	**$32,229**	**$32,099**	**$32,647**	**$32,887**	**$33,616**
% change	Accommodation & food services	*7.1%*	*3.2%*	*2.8%*	*5.0%*	*-2.9%*	*-4.2%*	*4.4%*	*-1.6%*	*2.2%*	*-0.9%*	*2.4%*
	Transportation services	*2.5%*	*2.7%*	*6.8%*	*-6.2%*	*2.8%*	*-0.5%*	*-0.1%*	*0.6%*	*1.1%*	*3.9%*	*1.5%*
	Retail services	*4.6%*	*4.3%*	*3.0%*	*-4.8%*	*5.1%*	*2.5%*	*1.9%*	*-0.4%*	*5.6%*	*0.4%*	*2.3%*
	Other services	*-0.6%*	*4.3%*	*2.3%*	*-13.1%*	*0.2%*	*-0.1%*	*2.6%*	*0.2%*	*-1.0%*	*1.6%*	*4.9%*
	Overall	***4.3%***	***3.2%***	***3.8%***	***-2.5%***	***0.1%***	***-1.1%***	***2.2%***	***-0.4%***	***1.7%***	***0.7%***	***2.2%***

TABLE 14: DOMESTIC VISITOR VOLUME AND YEAR-OVER YEAR CHANGE BY MARKET OF ORIGIN

Market	Volume ('000s)				% change		
	2011	2012	2013	2014	2011-2012	2012-2013	2013-2014
British Columbia	9,926	10,469	10,745	10,557	5.5%	2.6%	-1.7%
Alberta	2,529	2,151	2,766	2,531	-15.0%	28.6%	-8.5%
Ontario	530	563	677	587	6.2%	20.2%	-13.3%
Quebec	109	116	121	128	6.7%	4.3%	5.8%
Prairies	298	278	321	328	-6.8%	15.5%	2.2%
Atlantic	51	46	52	93	-9.5%	13.0%	78.8%
Overall	**13,443**	**13,624**	**14,683**	**14,223**	**1.3%**	**7.8%**	**-3.1%**

Source: Statistics Canada, Travel Survey of Residents of Canada. Methodological changes to the Travel Survey of Residents of Canada do not allow comparisons prior to 2011.

TABLE 15: DOMESTIC VISITOR EXPENDITURES AND YEAR-OVER YEAR CHANGE BY MARKET OF ORIGIN

Market	Expenditures ($ millions)				% change		
	2011	2012	2013	2014	2011-2012	2012-2013	2013-2014
British Columbia	$2,978	$3,145	$3,134	$3,218	*5.6%*	*-0.3%*	*2.7%*
Alberta	$1,240	$1,056	$1,523	$1,208	*-14.8%*	*44.2%*	*-20.7%*
Ontario	$469	$550	$545	$494	*17.4%*	*-1.0%*	*-9.3%*
Quebec	$128	$134	$151	$152	*4.4%*	*13.2%*	*0.3%*
Prairies	$193	$182	$244	$283	*-5.3%*	*33.6%*	*16.0%*
Atlantic	$48	$67	$72	$82	*39.7%*	*8.0%*	*14.2%*
Overall	**$5,055**	**$5,134**	**$5,670**	**$5,437**	***1.6%***	***10.4%***	***-4.1%***

Source: Statistics Canada, Travel Survey of Residents of Canada. Methodological changes to the Travel Survey of Residents of Canada do not allow comparisons prior to 2011.

TABLE 16: INTERNATIONAL VISITOR VOLUME BY MARKET OF ORIGIN

	Market	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Volume ('000)	**United States**	**3,711**	**3,536**	**3,518**	**3,394**	**3,147**	**2,899**	**2,955**	**2,904**	**2,941**	**2,741**	**2,840**
	Washington	1,393	1,332	1,257	1,201	1,187	1,153	1,134	1,152	1,208	1,278	1,269
	California	212	202	209	188	162	148	186	194	185	155	164
	Oregon	530	466	488	474	419	375	414	418	425	379	391
	Arizona	69	86	75	78	64	61	54	63	67	45	57
	Florida	108	104	93	91	93	65	85	84	67	52	83
	Texas	106	123	136	127	117	118	91	76	103	89	79
	Asia/Pacific	**750**	**757**	**744**	**765**	**738**	**611**	**713**	**688**	**723**	**760**	**851**
	Japan	200	204	183	172	125	84	105	86	90	102	97
	Hong Kong	66	62	58	63	77	60	69	61	66	68	61
	Australia	107	113	119	144	142	129	126	137	138	175	199
	South Korea	104	107	120	110	104	73	94	88	88	78	58
	China	68	65	65	69	90	92	109	130	155	172	221
	New Zealand	18	21	23	25	36	31	35	24	35	33	44
	India	10	8	9	22	23	26	48	29	21	20	25
	Europe	**580**	**595**	**576**	**635**	**624**	**557**	**601**	**559**	**502**	**573**	**580**
	United Kingdom	288	298	289	324	293	235	231	216	194	215	239
	Germany	116	111	104	101	112	111	120	102	98	117	100
	Netherlands	45	43	45	48	50	43	50	41	36	31	34
	France	24	17	19	23	27	25	31	35	30	56	60
	Mexico	**57**	**59**	**62**	**69**	**82**	**64**	**54**	**55**	**57**	**52**	**46**
	Other overseas	**51**	**35**	**51**	**48**	**39**	**44**	**41**	**56**	**59**	**86**	**73**
	TOTAL INTERNATIONAL	**5,149**	**4,983**	**4,951**	**4,911**	**4,630**	**4,175**	**4,364**	**4,262**	**4,282**	**4,350**	**4,390**

Source: Statistics Canada: International Travel Survey.

Note: A methodological change occurred for international visitor volume and expenditures between 2012 and 2013. As a result of this change, 2013 and 2014 international visitor volume and expenditure data cannot be compared to years prior.

TABLE 17: INTERNATIONAL VISITOR VOLUME YEAR-OVER-YEAR CHANGE BY MARKET ORIGIN

	Market	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Volume (% change)	**United States**	**1.3%**	**-4.7%**	**-0.5%**	**-3.5%**	**-7.3%**	**-7.9%**	**1.9%**	**-1.8%**	**1.3%**	**N/A**	**3.6%**
	Washington	-2.0%	-4.4%	-5.7%	-4.5%	-1.2%	-2.8%	-1.7%	1.6%	4.9%	N/A	-0.7%
	California	11.7%	-4.8%	3.4%	-9.9%	-13.7%	-9.0%	25.7%	4.7%	-4.5%	N/A	6.0%
	Oregon	2.9%	-12.0%	4.7%	-2.9%	-11.6%	-10.4%	10.3%	1.0%	1.7%	N/A	3.0%
	Arizona	7.1%	25.4%	-13.2%	4.1%	-18.2%	-4.6%	-10.5%	16.1%	5.9%	N/A	26.8%
	Florida	1.1%	-4.1%	-9.7%	-2.5%	2.1%	-29.6%	29.8%	-0.6%	-20.5%	N/A	60.8%
	Texas	-0.6%	15.2%	11.2%	-7.1%	-7.5%	0.2%	-22.5%	-16.8%	35.4%	N/A	-11.7%
	Asia/Pacific	**29.8%**	**1.0%**	**-1.7%**	**2.8%**	**-3.5%**	**-17.3%**	**16.7%**	**-3.5%**	**5.0%**	**N/A**	**11.9%**
	Japan	34.3%	1.6%	-10.1%	-5.9%	-27.6%	-33.0%	26.1%	-18.3%	4.1%	N/A	-5.3%
	Hong Kong	24.9%	-6.0%	-6.6%	9.8%	22.0%	-22.4%	15.9%	-12.8%	8.2%	N/A	-9.5%
	Australia	16.3%	4.8%	5.9%	20.8%	-1.6%	-9.2%	-2.2%	9.0%	0.6%	N/A	13.3%
	South Korea	10.5%	3.3%	11.7%	-8.1%	-5.7%	-29.6%	28.4%	-6.6%	0.0%	N/A	-26.3%
	China	57.4%	-4.0%	-0.4%	6.4%	30.0%	2.2%	17.9%	20.0%	19.1%	N/A	28.4%
	New Zealand	-12.8%	14.3%	10.4%	8.4%	44.5%	-14.0%	12.8%	-32.2%	45.8%	N/A	31.1%
	India	46.1%	-18.4%	10.2%	140.4%	5.3%	14.7%	81.4%	-38.5%	-29.6%	N/A	24.3%
	Europe	**9.0%**	**2.5%**	**-3.3%**	**10.3%**	**-1.8%**	**-10.7%**	**7.9%**	**-6.9%**	**-10.2%**	**N/A**	**1.2%**
	United Kingdom	11.7%	3.5%	-3.2%	12.2%	-9.4%	-19.8%	-1.9%	-6.4%	-10.1%	N/A	10.9%
	Germany	12.5%	-3.9%	-6.4%	-2.8%	10.3%	-0.7%	7.8%	-14.8%	-4.3%	N/A	-13.9%
	Netherlands	12.7%	-5.0%	3.4%	7.4%	5.1%	-15.5%	17.9%	-17.5%	-12.0%	N/A	10.5%
	France	2.1%	-29.2%	12.0%	23.0%	16.8%	-6.8%	21.6%	14.2%	-14.5%	N/A	6.7%
	Mexico	**113.8%**	**3.5%**	**3.5%**	**11.5%**	**19.9%**	**-22.4%**	**-16.1%**	**3.6%**	**3.2%**	**N/A**	**-11.5%**
	Other overseas	**14.2%**	**-30.5%**	**45.8%**	**-7.4%**	**-19.1%**	**15.2%**	**-7.0%**	**35.1%**	**6.0%**	**N/A**	**-15.8%**
	TOTAL INTERNATIONAL	**6.3%**	**-3.2%**	**-0.6%**	**-0.8%**	**-5.7%**	**-9.8%**	**4.5%**	**-2.3%**	**0.5%**	**N/A**	**0.9%**

Source: Statistics Canada: International Travel Survey.

Note: A methodological change occurred for international visitor volume and expenditures between 2012 and 2013. As a result of this change, 2013 and 2014 international visitor volume and expenditure data cannot be compared to years prior.

TABLE 18: INTERNATIONAL VISITOR EXPENDITURES BY MARKET OF ORIGIN

	Market	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Expenditures ($ millions)	**United States**	**$1,925**	**$1,722**	**$1,727**	**$1,671**	**$1,567**	**$1,424**	**$1,519**	**$1,468**	**$1,495**	**$1,586**	**$1,628**
	Washington	$427	$402	$371	$369	$365	$364	$384	$402	$418	$465	$451
	California	$89	$90	$88	$94	$95	$91	$97	$90	$78	$81	$105
	Oregon	$364	$289	$329	$323	$290	$246	$261	$270	$284	$338	$307
	Arizona	$39	$60	$49	$47	$38	$36	$39	$34	$43	$34	$52
	Florida	$82	$72	$54	$46	$42	$36	$55	$47	$49	$46	$55
	Texas	$82	$88	$92	$80	$83	$77	$72	$54	$75	$68	$63
	Asia/Pacific	**$825**	**$815**	**$824**	**$844**	**$898**	**$786**	**$845**	**$866**	**$879**	**$1,168**	**$1,292**
	Japan	$217	$236	$194	$164	$138	$111	$126	$125	$117	$112	$117
	Hong Kong	$74	$68	$53	$58	$70	$59	$64	$64	$70	$71	$66
	Australia	$125	$128	$144	$177	$191	$172	$166	$196	$200	$394	$419
	South Korea	$120	$124	$162	$138	$165	$117	$150	$134	$125	$100	$73
	China	$95	$68	$75	$101	$121	$135	$132	$140	$172	$269	$327
	New Zealand	$18	$10	$19	$22	$48	$49	$42	$29	$43	$60	$78
	India	$3	$2	$3	$11	$16	$18	$37	$23	$11	$15	$18
	Europe	**$685**	**$744**	**$687**	**$808**	**$807**	**$698**	**$764**	**$731**	**$662**	**$809**	**$785**
	United Kingdom	$343	$384	$338	$392	$369	$268	$263	$253	$243	$311	$361
	Germany	$124	$143	$126	$113	$147	$156	$163	$146	$139	$156	$144
	Netherlands	$52	$42	$50	$54	$67	$57	$61	$49	$51	$43	$43
	France	$22	$22	$26	$37	$26	$30	$44	$54	$39	$84	$63
	Mexico	**$75**	**$74**	**$79**	**$83**	**$96**	**$89**	**$67**	**$66**	**$90**	**$90**	**$59**
	Other overseas	**$58**	**$43**	**$60**	**$59**	**$46**	**$53**	**$45**	**$63**	**$76**	**$104**	**$105**
	TOTAL INTERNATIONAL	**$3,568**	**$3,399**	**$3,376**	**$3,466**	**$3,414**	**$3,049**	**$3,240**	**$3,194**	**$3,201**	**$3,758**	**$3,898**

Source: Statistics Canada: International Travel Survey.

Note: A methodological change occurred for international visitor volume and expenditures between 2012 and 2013. As a result of this change, 2013 and 2014 international visitor volume and expenditure data cannot be compared to years prior.

TABLE 19: INTERNATIONAL VISITOR EXPENDITURES YEAR-OVER-YEAR CHANGE BY MARKET OF ORIGIN

	Market	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Expenditures (% change)	**United States**	***4.7%***	***-10.6%***	***0.3%***	***-3.2%***	***-6.3%***	***-9.1%***	***6.7%***	***-3.4%***	***1.9%***	**N/A**	***2.6%***
	Washington	*-2.0%*	*-5.9%*	*-7.7%*	*-0.6%*	*-1.1%*	*-0.2%*	*5.6%*	*4.6%*	*3.9%*	N/A	*-3.1%*
	California	*-5.1%*	*1.6%*	*-3.1%*	*7.2%*	*1.7%*	*-5.1%*	*7.5%*	*-7.3%*	*-13.6%*	N/A	*29.4%*
	Oregon	*11.1%*	*-20.5%*	*13.7%*	*-1.6%*	*-10.4%*	*-15.3%*	*6.5%*	*3.2%*	*5.3%*	N/A	*-9.2%*
	Arizona	*1.8%*	*53.5%*	*-18.2%*	*-3.7%*	*-18.7%*	*-5.8%*	*7.5%*	*-12.9%*	*26.6%*	N/A	*52.7%*
	Florida	*10.5%*	*-12.6%*	*-25.0%*	*-13.9%*	*-9.7%*	*-13.0%*	*50.4%*	*-13.5%*	*2.6%*	N/A	*19.9%*
	Texas	*26.9%*	*6.7%*	*4.7%*	*-13.1%*	*4.3%*	*-8.1%*	*-5.9%*	*-25.0%*	*38.2%*	N/A	*-6.8%*
	Asia/Pacific	***23.9%***	***-1.2%***	***1.1%***	***2.4%***	***6.4%***	***-12.4%***	***7.5%***	***2.5%***	***1.5%***	**N/A**	***10.6%***
	Japan	*20.8%*	*8.8%*	*-17.9%*	*-15.6%*	*-15.7%*	*-19.8%*	*14.0%*	*-0.6%*	*-7.0%*	N/A	*4.4%*
	Hong Kong	*60.4%*	*-8.1%*	*-22.3%*	*10.4%*	*20.0%*	*-15.0%*	*8.0%*	*-0.2%*	*10.1%*	N/A	*-7.1%*
	Australia	*13.4%*	*2.1%*	*12.6%*	*23.2%*	*8.1%*	*-10.0%*	*-3.5%*	*18.3%*	*2.0%*	N/A	*6.5%*
	South Korea	*-1.6%*	*3.5%*	*30.8%*	*-15.1%*	*19.5%*	*-28.8%*	*27.5%*	*-10.1%*	*-7.4%*	N/A	*-27.0%*
	China	*75.8%*	*-28.9%*	*10.5%*	*34.3%*	*20.3%*	*11.6%*	*-2.6%*	*6.2%*	*22.9%*	N/A	*21.3%*
	New Zealand	*-41.8%*	*-46.3%*	*94.8%*	*17.3%*	*114.4%*	*1.6%*	*-14.6%*	*-29.1%*	*44.7%*	N/A	*31.0%*
	India	*135.7%*	*-33.0%*	*38.3%*	*249.1%*	*41.7%*	*10.0%*	*110.5%*	*-38.7%*	*-51.3%*	N/A	*21.2%*
	Europe	***10.9%***	***8.7%***	***-7.7%***	***17.6%***	***-0.1%***	***-13.6%***	***9.6%***	***-4.3%***	***-9.5%***	**N/A**	***-3.0%***
	United Kingdom	*12.8%*	*12.1%*	*-12.0%*	*16.1%*	*-6.0%*	*-27.3%*	*-1.9%*	*-3.8%*	*-3.9%*	N/A	*16.1%*
	Germany	*1.6%*	*15.9%*	*-12.1%*	*-10.5%*	*30.5%*	*6.0%*	*4.6%*	*-10.3%*	*-5.3%*	N/A	*-7.3%*
	Netherlands	*21.8%*	*-20.3%*	*20.3%*	*6.4%*	*24.4%*	*-14.2%*	*7.5%*	*-19.6%*	*2.9%*	N/A	*0.2%*
	France	*-12.1%*	*1.1%*	*18.3%*	*42.9%*	*-29.7%*	*15.6%*	*43.3%*	*24.0%*	*-27.7%*	N/A	*-25.3%*
	Mexico	***76.4%***	***-0.8%***	***6.5%***	***5.7%***	***15.5%***	***-7.3%***	***-24.9%***	***-1.3%***	***35.2%***	**N/A**	***-34.7%***
	Other overseas	***17.7%***	***-24.9%***	***37.4%***	***-1.1%***	***-21.9%***	***14.7%***	***-14.8%***	***40.1%***	***19.8%***	**N/A**	***0.5%***
	TOTAL INTERNATIONAL	***11.0%***	***-4.7%***	***-0.7%***	***2.6%***	***-1.5%***	***-10.7%***	***6.3%***	***-1.4%***	***0.2%***	**N/A**	***3.7%***

Source: Statistics Canada: International Travel Survey.

Note: A methodological change occurred for international visitor volume and expenditures between 2012 and 2013. As a result of this change, 2013 and 2014 international visitor volume and expenditure data cannot be compared to years prior.