



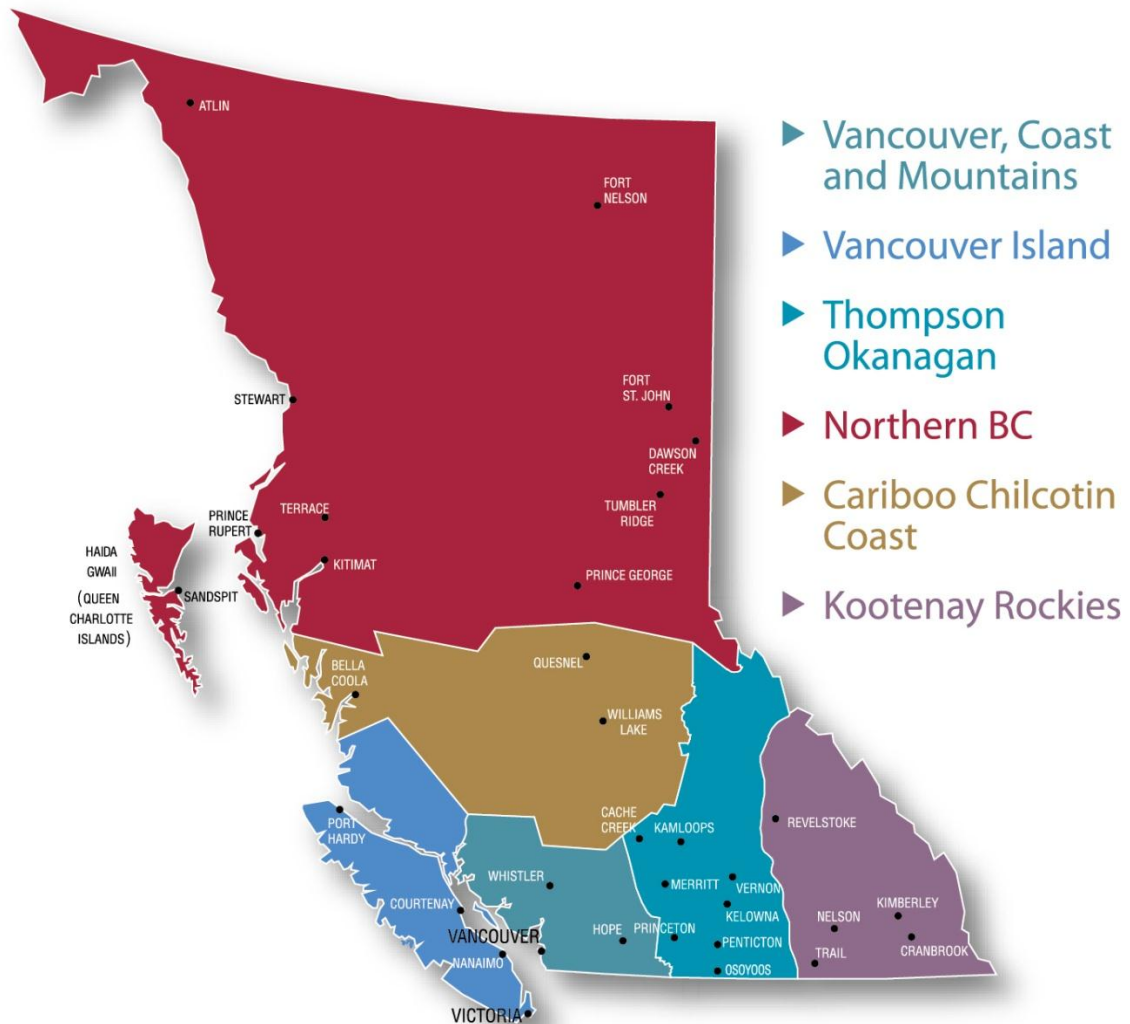
# The Value of Tourism in British Columbia

Destination  
British Columbia™

Trends from 2002 to 2012

February 2014

## MAP OF BRITISH COLUMBIA TOURISM REGIONS





## TABLE OF CONTENTS

MAP OF BRITISH COLUMBIA TOURISM REGIONS .....	1
<b>1. Overview .....</b>	<b>2</b>
<b>2. Contributions to the economy .....</b>	<b>4</b>
TOURISM REVENUES .....	5
Total revenue .....	5
Tourism revenue by sector .....	6
Accommodation room revenue .....	7
Tax revenue .....	7
Export revenue .....	8
GROSS DOMESTIC PRODUCT (GDP) .....	10
GDP .....	10
GDP by sector .....	10
GDP by primary resource industry .....	12
<b>3. Business and people .....</b>	<b>13</b>
TOURISM BUSINESSES .....	13
Total establishments .....	13
Tourism businesses by sector .....	14
Tourism businesses by region .....	16
TOURISM EMPLOYMENT .....	17
Direct employment .....	17
Tourism employment by sector .....	18
Tourism employment by region .....	19
Wages and salaries .....	20
Tourism salaries by sector .....	21
<b>4. Market origin .....</b>	<b>22</b>
Overall visitor volume and expenditures .....	23
Domestic Markets: visitor volume and expenditures .....	23
International markets: visitor volume and expenditures .....	24
<b>5. Summary .....</b>	<b>27</b>
<b>Contents of Appendix .....</b>	<b>31</b>

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# 1. Overview

The tourism industry in British Columbia has demonstrated strong growth since 2002, despite multiple external shocks such as 9/11, SARS, the H1N1 virus, the earthquake and tsunami in Japan, and the global economic crisis. However, setbacks have been mitigated by the positive impacts stemming from the 2010 Olympic and Paralympic Winter Games in Vancouver and Whistler, and the successful completion of negotiations for Approved Destination Status with China.

This document presents 10 years of data on the economic value of tourism to British Columbia. Overall, the tourism industry grew between 2002 and 2007, but was impacted in 2008 and 2009 by the worldwide downturn in the economy. Recovery in the tourism industry was sparked in 2010, and growth has been maintained through 2012.

The tourism industry continues to play a significant role in the British Columbia economy, in terms of revenue earned by tourism businesses, value added to the economy by tourism activities, and creation of employment opportunities. Tourists or visitors within British Columbia include British Columbia residents, other Canadian residents, and international visitors. Visitors may be travelling for pleasure, business/government, or educational purposes.

## Key highlights:

- In 2012, the tourism industry generated \$13.5 billion in revenue, a 2.5% increase from 2011 and a 40.5% increase over 2002.
  - In 2012, \$1.5 billion of accommodation room revenue was earned in communities with the Municipal Regional District Tax (MRDT)<sup>1</sup>, an increase of 1.6% from 2011.
  - The tourism industry contributed \$1.2 billion in provincial taxes, an increase of 4.7% from 2011 and 72.6% from 2002.
  - \$3.2 billion in export revenue was generated, a slight 0.2% increase from 2011 and a decrease of 12.6% since 2002.
- Tourism generated a direct contribution to British Columbia's gross domestic product (GDP) of \$7.1 billion (2007 constant

↑  
+ 2.5%

*Total Tourism  
Revenue*

↑  
+1.6%

*Accommodation  
Room Revenue  
(MRDT  
communities)*

↑  
+4.7%

*Provincial Tax  
Revenue*

↑  
+0.2%

*Export  
Revenue*

↑  
+1.5%

*Tourism  
GDP*

<sup>1</sup> Only total MRDT for 2012 data is available; an updated version of this report will be made available when regional breakdown is available from BC Stats. Since the MRDT is collected only in certain municipalities in British Columbia, room revenue data will only be provided for those areas that collected MRDT in 2010 and 2011 to allow year-over-year comparisons. "Overall" accommodation room revenue is simply the sum of the areas with reportable MRDT based estimates of room revenue (i.e., this does not include the District of Wells). MRDT areas account for between 70% and 75% of total provincial accommodation room revenue.

dollars), an increase of 1.5% over 2011 and a 4.4% increase from 2007.<sup>2</sup>

- In 2012, there were 18,387 tourism-related businesses in operation in British Columbia. The number of establishments is up 2.0% from 2011 and 2.2% from 2002.
- The tourism industry employed 127,300 people in 2012, up slightly over 2011 (0.6%), and up 14.8% over 2002.
- In 2012, total tourism wages and salaries were \$4.3 billion, up 4.0% from 2011 and an increase of 30.5% from 2002. Average compensation in the tourism industry is just over \$34,000.
- In 2012, there were 13.6 million overnight domestic visitors (i.e., from Canada) to British Columbia.<sup>3</sup> More than 10 million overnight visitors (76.8%) were British Columbia residents. The number of overnight visitors to British Columbia from Canada (including British Columbia residents) increased by 1.3% from 2011.
- In 2012, there were 4.3 million overnight international visitors (i.e., from other countries) to British Columbia, a slight increase of 0.5% from 2011. Over two-thirds (68.7%, nearly 3 million) of all international overnight visitors were from the United States.
- Overnight domestic visitor expenditures totalled \$5.1 billion in 2012, a decrease of 4.0% since 2011. Of these travellers, British Columbia resident visitors contributed the largest portion of expenditures (61.3%, \$3.1 billion), a spending decline of 3.9% from 2011.
- Overnight international visitor expenditures increased slightly (0.2%) from 2011 to \$3.2 billion. While United States visitors were the source of the largest share of international expenditures (46.7%), they spent proportionately less than visitors from overseas.

↑  
+2.0%

*Tourism  
Businesses*

↑  
+0.6%

*Tourism  
Employment*

↑  
+4.0%

*Tourism Wages  
& Salaries*

↑  
+1.3%

*Domestic  
Visitor Volume*

↓  
-3.9%

*Domestic  
Expenditures*

↑  
+0.5%

*International  
Visitor Volume*

↑  
+0.2%

*International  
Expenditures*

<sup>2</sup> Currently, 2007 constant dollars GDP is only available back to 2007 (not 2002).

<sup>3</sup> 2012 overnight domestic visitor data is preliminary and is subject to revisions; an updated version of this report will be made available when final data is available.

## 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 money received by businesses, individuals and governments, due to tourism activities.
- Gross domestic product (GDP) measures the value added to the economy from tourism activities. The costs of supplies and services used to produce goods or services are subtracted from total revenues. This measure highlights the specific contribution the tourism industry makes to the British Columbia economy.

Accurately estimating tourism revenues is difficult because the tourism industry draws from parts of several industries: accommodation and food services, retail services, transportation services and other services.

In the past, British Columbia's estimates of tourism revenue were based on spending reported by visitors through surveys – a demand-side approach. Many tourism and statistical agencies have recognized the challenges of relying on visitor surveys to estimate tourism revenue and have adopted a supply-side approach to estimating tourism revenue by developing tourism satellite accounts (TSA)<sup>4</sup>. Statistics Canada and the Canadian Tourism Commission have been leaders in developing a national TSA, which is the source of estimates of tourism revenue for Canada as a whole.

In 2009, the British Columbia provincial statistical agency (BC Stats) and Tourism British Columbia<sup>5</sup> 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 determine the total revenue due to the tourism industry. This approach is similar to the methodology that was already in place for estimating tourism GDP. BC Stats has developed tourism revenue estimates back to 1998.

This section summarizes total tourism revenues and the tourism industry's GDP between 2002 and 2012. The section also includes a discussion of accommodation room revenue (2012), tax revenues, and export revenues (2002-2012). Detailed tables are available in Appendix A; Tables 1 through 7 are specific to the information covered in this section.

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<sup>4</sup> 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.

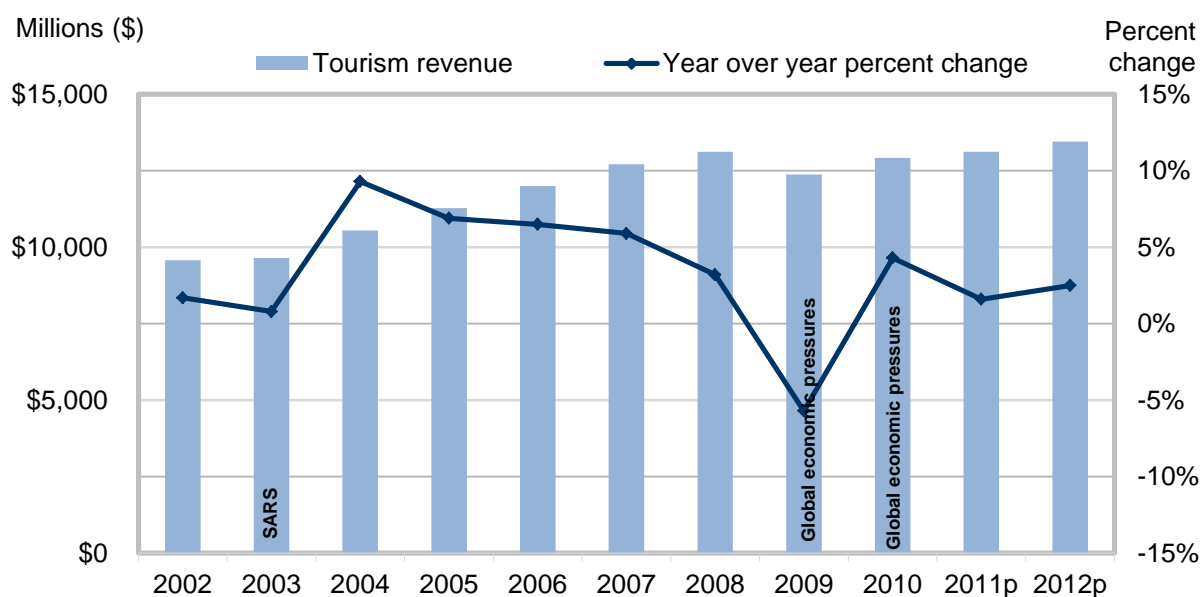
<sup>5</sup> Prior to April 1, 2013, Destination British Columbia was known as Tourism British Columbia, a part of the Ministry of Jobs, Tourism and Skills Training.

## TOURISM REVENUES

### Total revenue

The tourism industry generated revenues of \$13.5 billion in 2012<sup>6</sup>, an increase of 2.5% from 2011 (Figure 1). Since 2002, total tourism revenues have grown 40.5%. In fact, tourism revenues have grown every year between 2002 and 2012, with the exception of 2009. However, growth varied considerably, ranging between an increase of 9.3% and a decrease of about 0.8%. A 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 2012 was at least partially attributable to the high-profile exposure from the 2010 Olympic and Paralympic Winter Games, implementation in China of Approved Destination Status for Canada in conjunction with increased air capacity from China, and a rebound of the global economy. See also Table 1, page 32.

FIGURE 1: OVERALL TOURISM REVENUE AND YEAR-OVER-YEAR CHANGE (2002 TO 2012)



Tourism revenue estimates provided by BC Stats summarize the overall picture for British Columbia. Regional breakouts are not available, and a supply-side approach does not permit the breakout of revenue by market of origin.

However, for business planning purposes, it is important to understand the relative importance of different markets of origin in generating revenue for the tourism industry. It is also important to have information on the extent to which growth rates differ by market of origin (as well as data on visitor and trip behavior and characteristics) to target marketing and development investments efficiently. This information is captured through visitor surveys and is presented in Section 4 (Market origin) of this report.

<sup>6</sup> Source: BC Stats; 2011 and 2012 data are preliminary and subject to revision ("2011p" and "2012p").

## Tourism revenue by sector

In 2012, transportation, accommodation and food services generated nearly two-thirds of total tourism revenues, while retail services accounted for more than a quarter of revenues (Figure 2).

Other tourism-related services (including vehicle rentals, tourism-related recreation and entertainment, and vacation homes) accounted for less than 10% of total revenues.

Since 2002, the accommodation and food services sector has grown by 26.0%, while transportation, retail services and other tourism services saw even stronger growth over the 10-year period with an increase of 48.7% and 49.4%, respectively.

While the share of total revenue generated by each sector<sup>7</sup> has remained relatively constant from 2002 to 2012, annual growth rates have fluctuated considerably (Figure 3). For most sectors, 2009 was a year of decrease due to the economic recession, with levels returning to those of previous years in 2010, 2011 and 2012. See also Table 2, page 33.

FIGURE 2: SHARE OF 2012 TOURISM REVENUE BY SECTOR

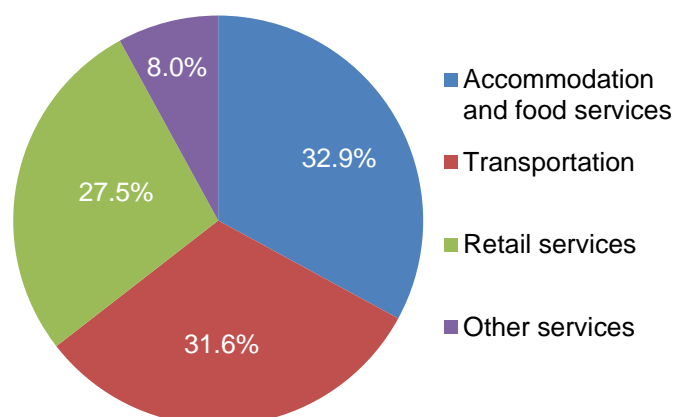
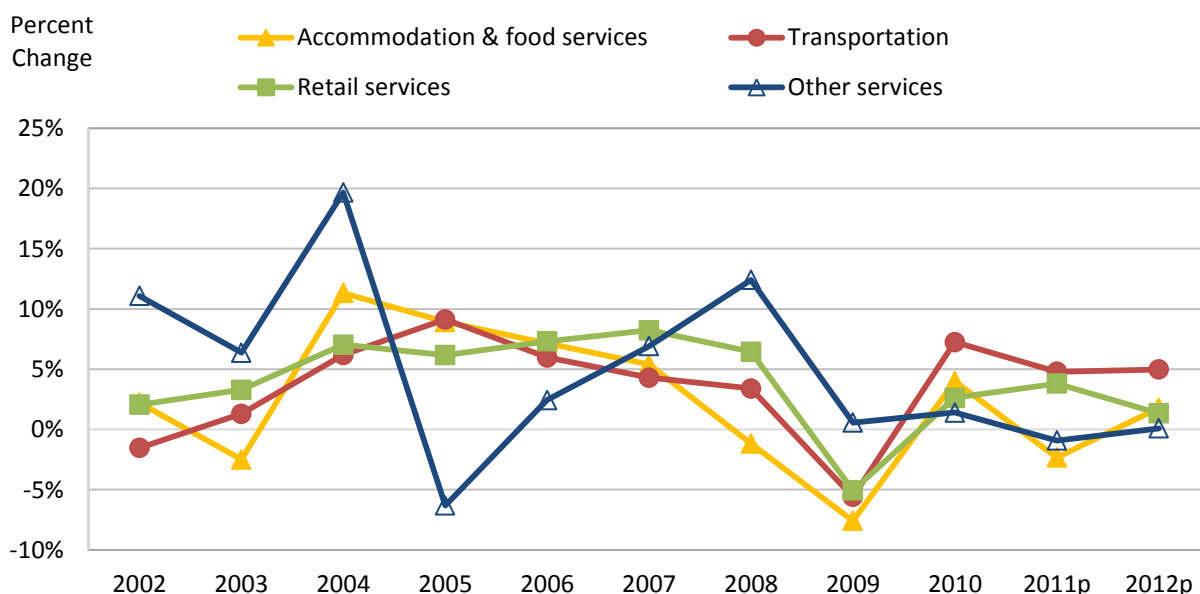


FIGURE 3: TOURISM REVENUE GROWTH RATES BY SECTOR (2002 TO 2012)



<sup>7</sup> Two terms are used to refer to industries in this document. "Retail services industry," for example, encompasses the entire retail services industry, while the tourism-related component of the industry is referred to as the "retail services sector" in this report.



Accommodation and food services contracted in 2003, rebounded with 11.3% growth in 2004, continued growing through 2007, dropped in 2008 and 2009, increased again in 2010, lost a portion of the increase in 2011 but partially regained it back in 2012.

The transportation services sector lost ground in 2002, gained an average 5.0% annual growth from 2003 to 2008, fell by 5.6% in 2009, grew 6.0% in both 2010 and 2011, and grew another 5.0% in 2012.

Low growth in retail services in 2002 and 2003 was followed by an average 7.0% growth from 2004 to 2008. The 5.1% drop in 2009 was nearly overcome in 2010 (2.6%), while growth continued in 2011 (3.8%) and in 2012, but at a slower rate (1.3%).

The performance of other tourism-related services has varied greatly over the years, with a high of 19.7% growth in 2004 to a low of a 6.3% decline in 2005, followed by steadily increasing growth from 2006 through 2008, then a small increase in 2009 and 2010 (0.6% and 1.4%, respectively), slight declines in 2011 (-0.9%) and nearly no change in 2012 (0.1%).

### **Accommodation room revenue**

Estimates of total provincial accommodation room revenue are no longer available due to the elimination of the Hotel Room Tax in 2010. However, it is possible to estimate accommodation room revenue for those urban centres, communities and regional districts that collect the Municipal Regional District Tax (MRDT). This section reports accommodation room revenue earned in MRDT areas in each tourism region, with the exception of the Cariboo Chilcotin Coast.<sup>8</sup>

Estimated accommodation room revenue, based on MRDT collected in five of British Columbia's six tourism regions, amounted to \$1.5 billion in 2012, an increase of 1.6% from 2011.

*Estimated accommodation room revenue based on MRDT is only currently available as a total for 2012. Regional breakdown of MRDT data is not yet available. An updated version of this report will be made available when the data is provided.*

### **Tax revenue**

In 2012, the tourism industry generated \$1.2 billion<sup>9</sup> in revenue from provincial taxes, which include income, hotel, gas and other taxes (Figure 4).

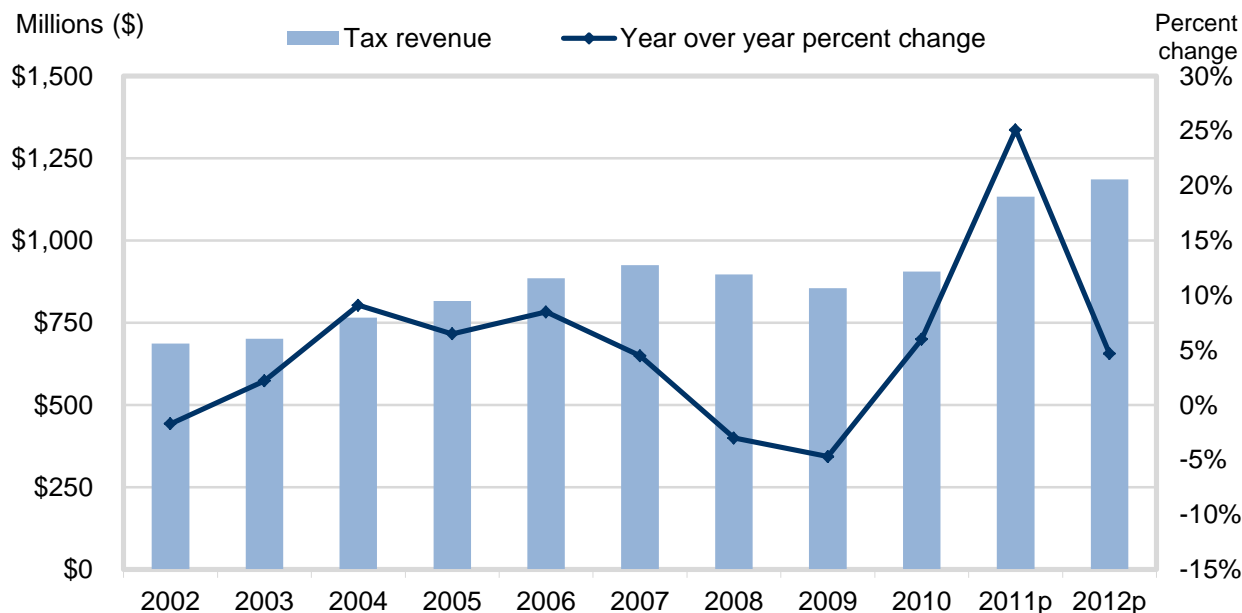
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<sup>8</sup> Historic room revenue estimates were based exclusively on the amount of Hotel Room Tax (HRT) collected by eligible accommodation establishments across British Columbia. This tax was repealed on June 30, 2010. BC Stats is now basing room revenues estimates on the amount of Municipal Regional District Tax (MRDT) collected. Since the MRDT is collected only in certain municipalities in British Columbia, room revenue data will only be provided for those areas that collected MRDT in 2010 and 2011 to allow year-over-year comparisons. (Those areas that no longer collect MRDT have been excluded.) As well, MRDT is not reported for the Cariboo Chilcotin Coast tourism region, as not enough communities in that region collected MRDT to meet data confidentiality requirements. Therefore, "overall" accommodation room revenue is simply the sum of the five other regions' reportable MRDT based estimates of room revenue. MRDT areas account for between 70% and 75% of total provincial accommodation room revenue.

<sup>9</sup> Source: BC Stats; 2011 and 2012 revenue data are preliminary and subject to revision ("2011p" and "2012p").

Since 2002, tax revenue has increased 72.6%. In 2002, British Columbia experienced a 1.7% decline in tourism tax revenue (related to tax cuts instituted in 2001). The growth in tax revenue rebounded between 2003 and 2007 (average growth of 6.2%), due to industry growth. Provincial tourism tax revenues decreased in 2008 and 2009, but increased by 6.0% in 2010, as the industry recovered from the global recession and the Harmonized Sales Tax (HST) was introduced. In 2011, provincial tourism tax revenue grew by 25.1% due in large part to the HST.<sup>10</sup> In 2012, the second full year of the HST, tax revenues stabilized with 4.7% growth. See also Table 1, page 32.

**FIGURE 4: TOURISM-RELATED TAX REVENUE AND YEAR-OVER-YEAR CHANGE (2002 TO 2012)**



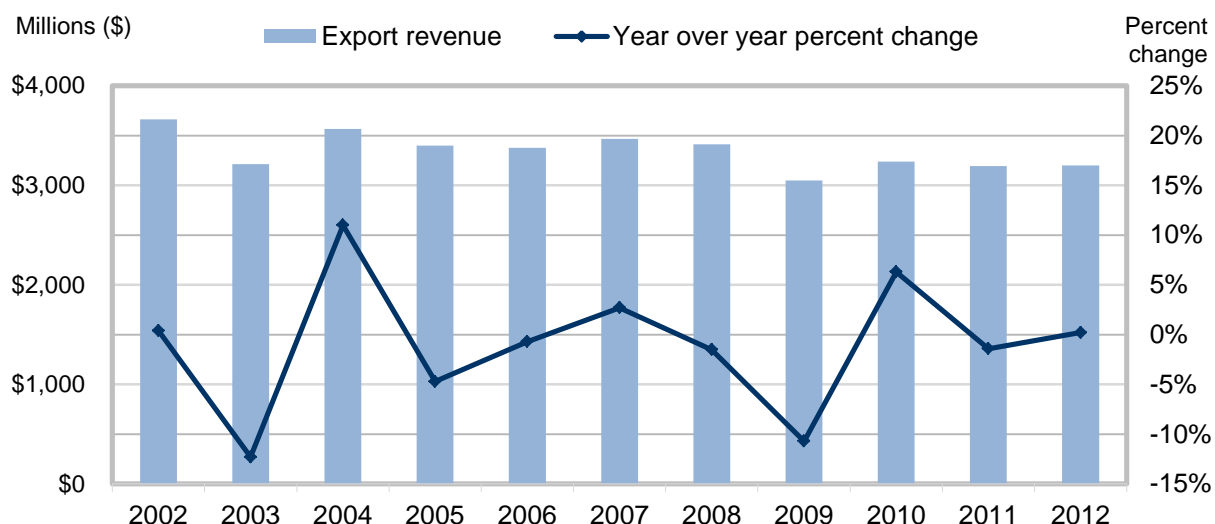
## Export revenue

Export revenue is generated from the sale of tourism products and services to international visitors. The tourism industry generated \$3.2 billion in export revenue in 2012, about even with 2011 (0.2%) (Figure 5).

Tourism export revenue varied considerably between 2002 and 2012. In 2003, export revenue declined by 12.3%, due to the impact of SARS, but then rebounded 11.0% the following year. Export revenue dropped by 4.7% in 2005 and stabilized in 2006. The slight gain in 2007 was lost 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 12.6% between 2002 and 2012. See also Table 1, page 32.

<sup>10</sup> 2011 was the first full year of the Harmonized Sales Tax (HST) implementation. The HST is applicable to consumer purchases, many of which were previously exempt from the Provincial Sales Tax.

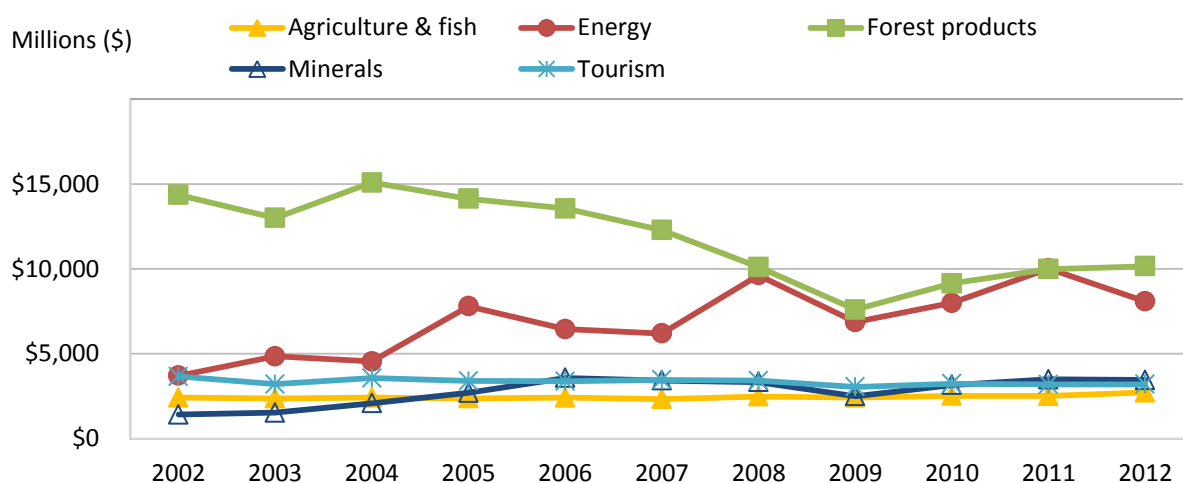
**FIGURE 5: TOURISM EXPORT REVENUE (2002 TO 2012)**



Between 2002 and 2012, the tourism industry's export revenue was similar to that of agriculture and fish products, and mineral products (Figure 6). While agricultural exports have remained relatively steady at an average of \$2.7 billion per year, mineral exports rose 143.4% since 2002 to \$3.5 billion, while tourism exports have dropped by 12.6% since 2002 (and 7.6% from 2007). See also Table 3, page 34.

Forest product export revenues have increased since 2009 to \$10.2 billion, gaining some growth back from the annual declines as of 2005, but are still down 29% since 2002.<sup>11</sup> Energy exports generated the largest export revenues in 2011 (\$8.1 billion), but declined by 19.4% in 2012. There has been a dramatic increase (117.7%) in energy export revenues since 2002.

**FIGURE 6: EXPORT REVENUE FROM BRITISH COLUMBIA'S PRIMARY RESOURCE COMMODITIES (2002 TO 2012)**



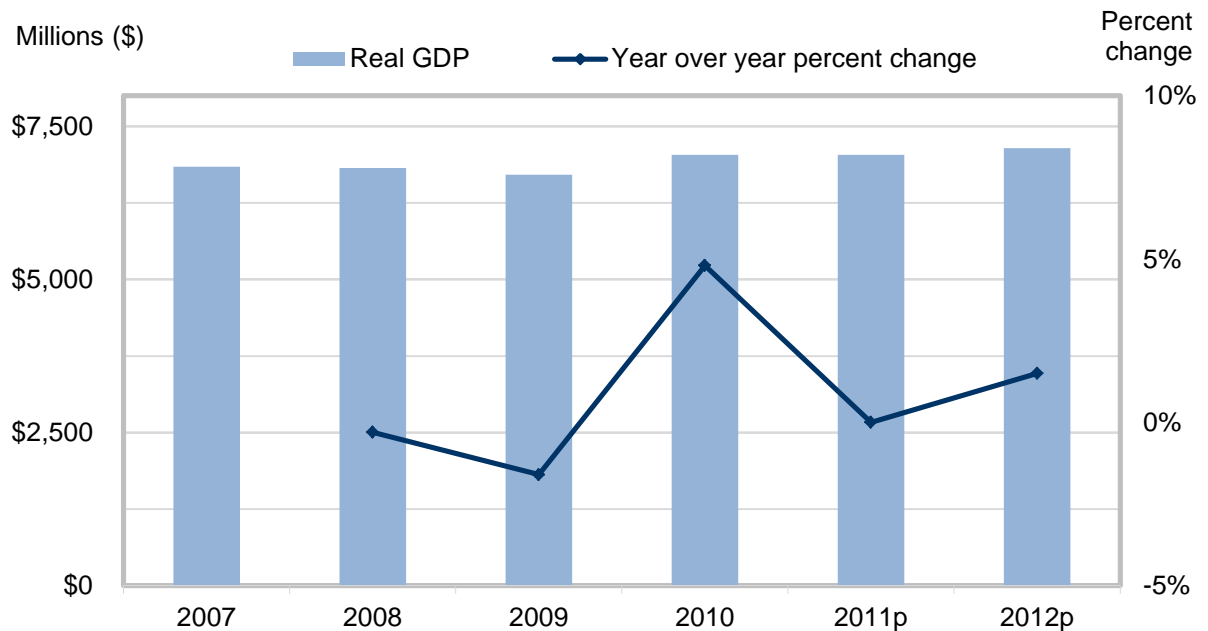
<sup>11</sup> Ministry of Forests and Range, 2009/10-2011/12 Service Plan Update: Declines were due to the weakening housing market, low timber prices, softwood lumber duties and the weakening pulp market.

## GROSS DOMESTIC PRODUCT (GDP)

### GDP

While the tourism industry generated \$13.5 billion in total revenue, it contributed \$7.1 billion of added value to the economy in 2012, measured using GDP (in 2007 constant dollars).<sup>12</sup> This was an increase of 1.5% compared with 2011, and over a 4.4% increase from 2007 (Figure 7). See also Table 1, page 32.

**FIGURE 7: TOURISM GROSS DOMESTIC PRODUCT AND YEAR-OVER-YEAR CHANGE (2007 TO 2012)**

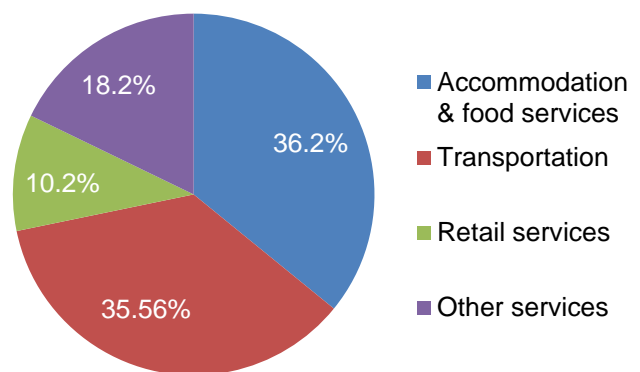


### GDP by sector

In 2012, transportation and accommodation and food services accounted for 64.5% of tourism GDP (based on 2007 constant dollars) (Figure 8).

While retail services earned 27.5% of revenue, this sector only accounted for 10.2% of GDP. Comparatively, other services earned 8.0% of revenue but accounted for more than double that, in terms of share of GDP.

**FIGURE 8: SHARE OF 2012 GDP BY SECTOR**

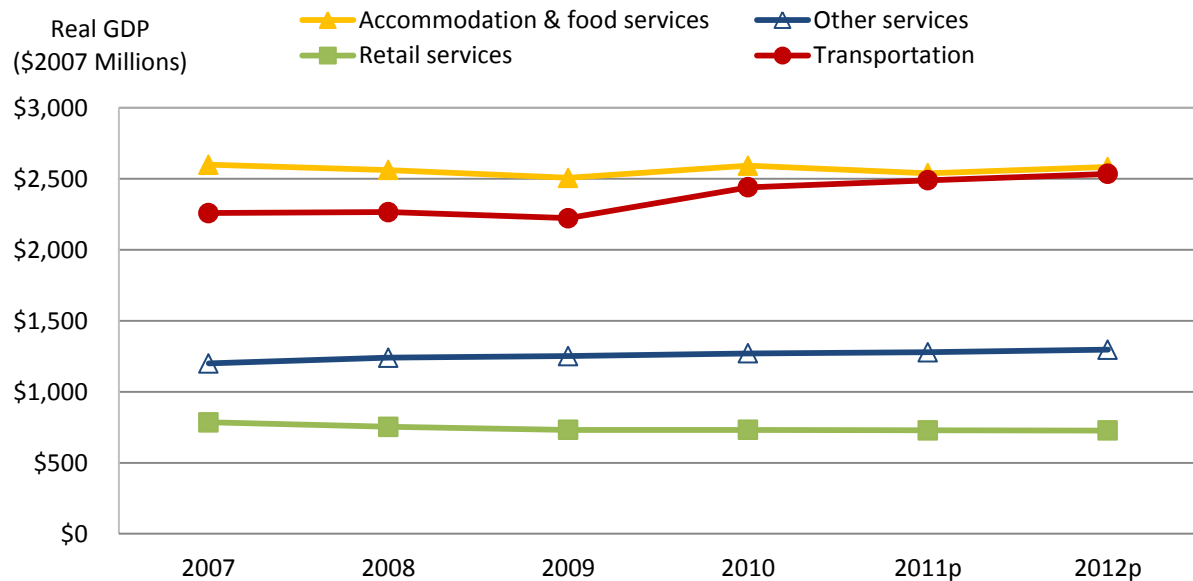


<sup>12</sup> Source: BC Stats; Real GDP data for 2011 and 2012 are preliminary estimates and are subject to revision ("2011p" and "2012p"). Pre-2007 real GDP data is not yet available.



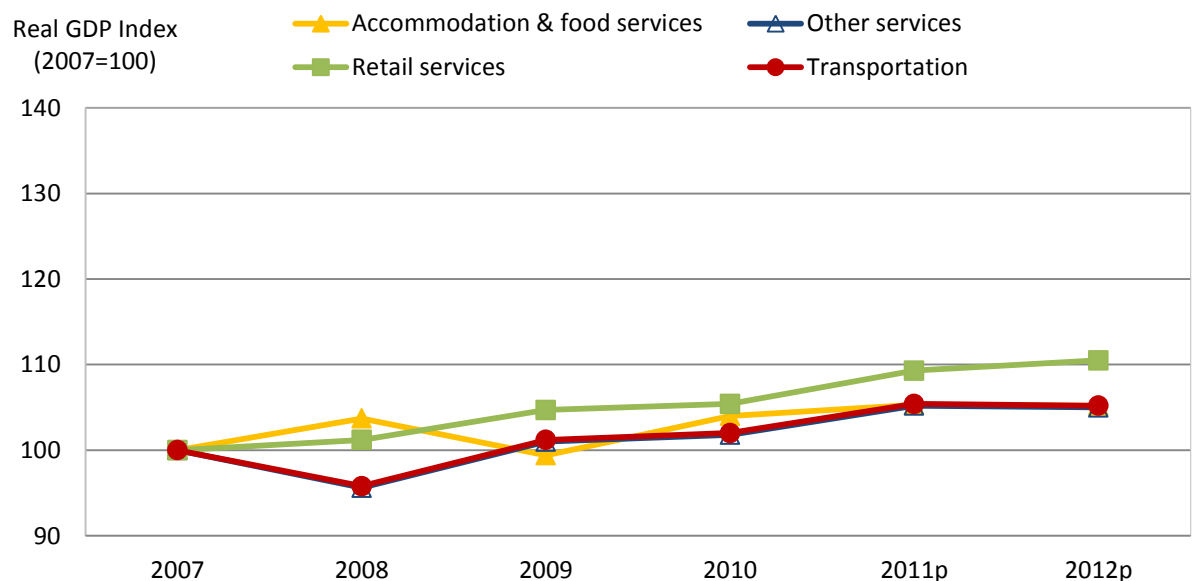
Transportation and other services have seen growth in real GDP since 2007 (12.2% and 8.2%, respectively), while retail and accommodation and food services have seen declines since 2007 (-7.4% and -0.6%, respectively) (Figure 9). See also Table 4, page 35.

**FIGURE 9: REAL GDP BY SECTOR (2007 TO 2012)**



Accommodation and food services, and transportation lost ground in 2009, but resumed growth in 2010, which continued through 2012. The retail services sector has seen flat growth since declines in 2009 (Figure 10). See also Table 5, page 36.

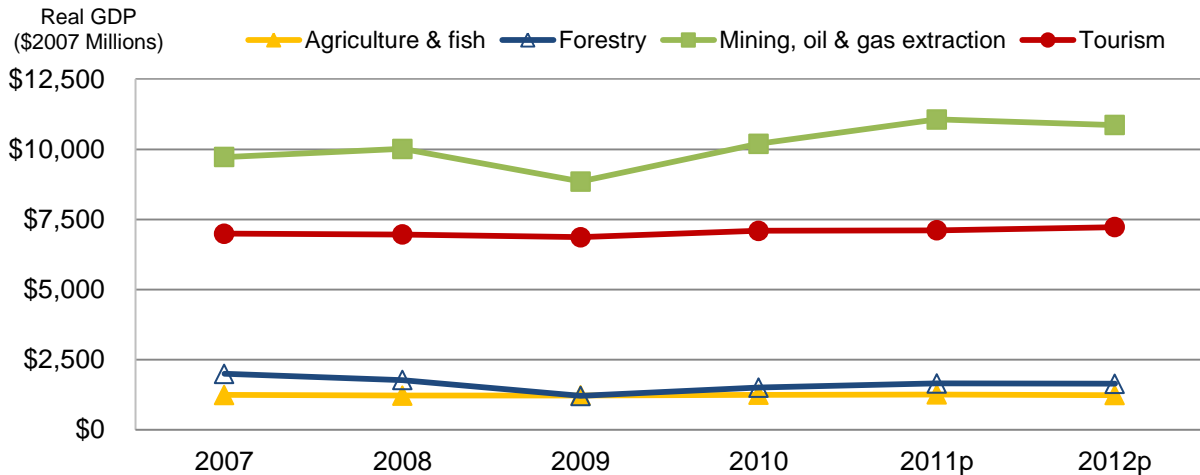
**FIGURE 10: REAL GDP INDEX BY SECTOR (2007 TO 2012)**



## GDP by primary resource industry

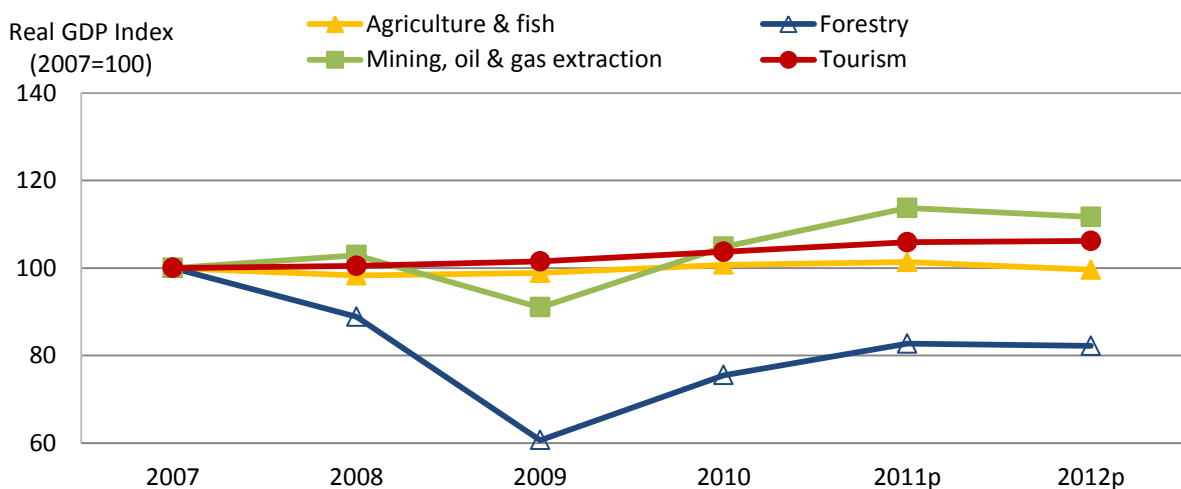
The tourism industry makes a significant contribution to the British Columbia economy compared with other primary resource industries<sup>13</sup>, including forestry, agriculture and fish<sup>14</sup>, and mining, oil and gas extraction (Figure 11). See also Table 6, page 36. From 2007 to 2012, GDP of the mining, oil and gas extraction, and tourism industries have each increased (11.7% and 4.4%, respectively), while forestry has dropped significantly (-17.8%) and agriculture and fish have dropped slightly (0.4%).

**FIGURE 11: REAL GDP BY PRIMARY RESOURCE INDUSTRY (2007 TO 2012)**



The real GDP index of tourism and the agriculture and fish industries have hovered around their respective 2007 levels, while the real GDP index for the forest industry experienced high variation. Similarly, the real GDP index for the mining, oil and gas industry has fluctuated since 2007.

**FIGURE 12: COMPARING REAL GDP INDEX BY PRIMARY RESOURCE INDUSTRY (2007 TO 2012)**



<sup>13</sup> Source: BC Stats (<http://www.bcstats.gov.bc.ca/StatisticsBySubject/Economy/EconomicAccounts.aspx>, 2002-2012, chained 2007\$).

<sup>14</sup> "Agriculture and fish" includes crop and animal production, agricultural support services, and fishing, trapping and hunting.

### 3. Business and people

In addition to the revenues and gross domestic product 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. Every year, new tourism businesses are established and others are closed.

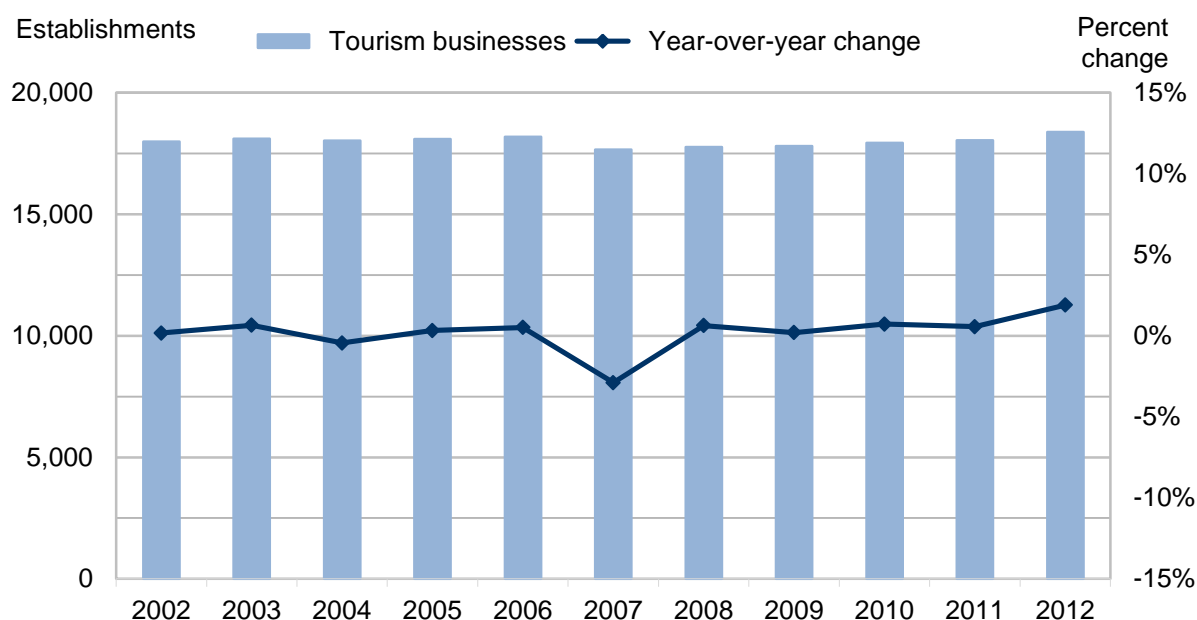
This section summarizes the number of tourism establishments (businesses) in British Columbia and provides statistics on tourism establishments. Detailed tables are available in Appendix A; Tables 1 and 7 through 12 are specific to the information covered in this section.

#### TOURISM BUSINESSES

##### Total establishments

In 2012, there were 18,387<sup>15</sup> tourism-related establishments operating in British Columbia (Figure 13). The number of tourism establishments was fairly steady from 2002 to 2011, with overall growth of only 0.4%, while 2012 saw more substantial growth of 2.0%. See also Table 1, page 32.

FIGURE 13: COUNT OF TOURISM BUSINESSES AND YEAR-OVER-YEAR CHANGE (2002 TO 2012)



The decrease in the number of tourism establishments in 2007 occurred primarily among very small businesses (those of 1 to 4 employees).<sup>16</sup> In 2006, very small businesses accounted for 45.4% of businesses; in 2007, the number of very small businesses

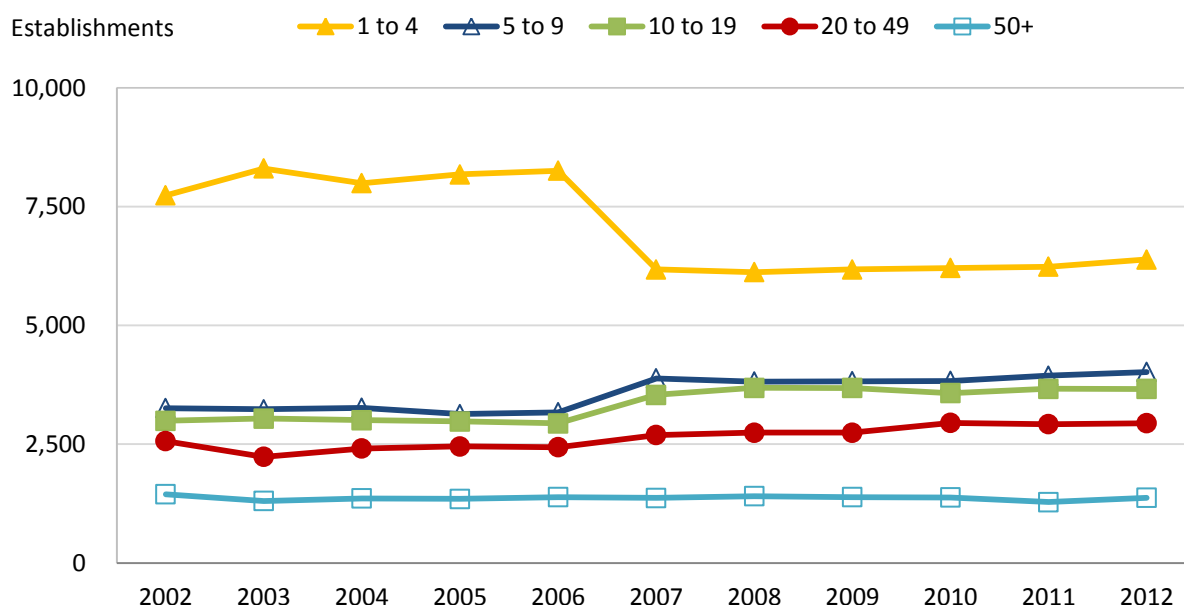
<sup>15</sup> Source: BC Stats.

<sup>16</sup> 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>).

dropped to 6,179, a decline of 25.2% from the previous year<sup>17</sup> (Figure 14). See also Table 7, page 37.

From 2007 through 2011, the number of businesses (of all sizes) was stable. In 2012, businesses with fewer than 9 employees saw 6.5% growth (3.3% for 1 to 4 employees and 3.2% from 5 to 9 employees).

**FIGURE 14: COUNT OF TOURISM BUSINESSES BY SIZE (NUMBER OF EMPLOYEES) (2002 TO 2012)**

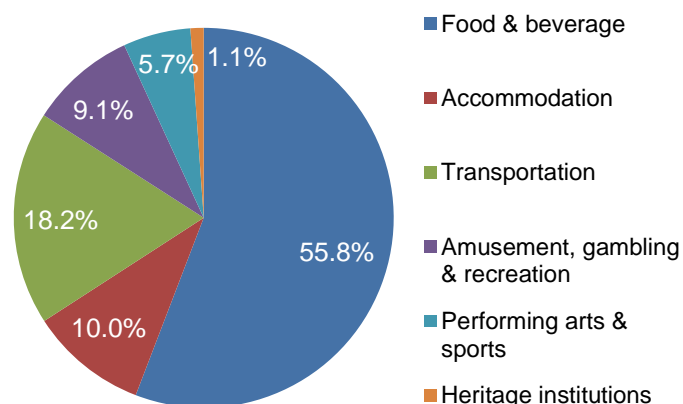


### Tourism businesses by sector

Two-thirds of British Columbia's tourism-related businesses are in the accommodation and food and beverage sectors, while transportation is the next largest sector (Figure 15).<sup>18</sup> Within the accommodation and food services sector, 55.8% were food and beverage businesses, while 10.0% were accommodations.

The performing arts and sports and the food and beverage sectors experienced overall growth since 2002

**FIGURE 15: SHARE OF 2012 TOURISM BUSINESSES BY SECTOR**



(by 13.8% and 8.2%, respectively). In 2007, all tourism sectors experienced a

<sup>17</sup> As noted in the previous footnote, the large decline was partly the result of the redesign of the Business Register.

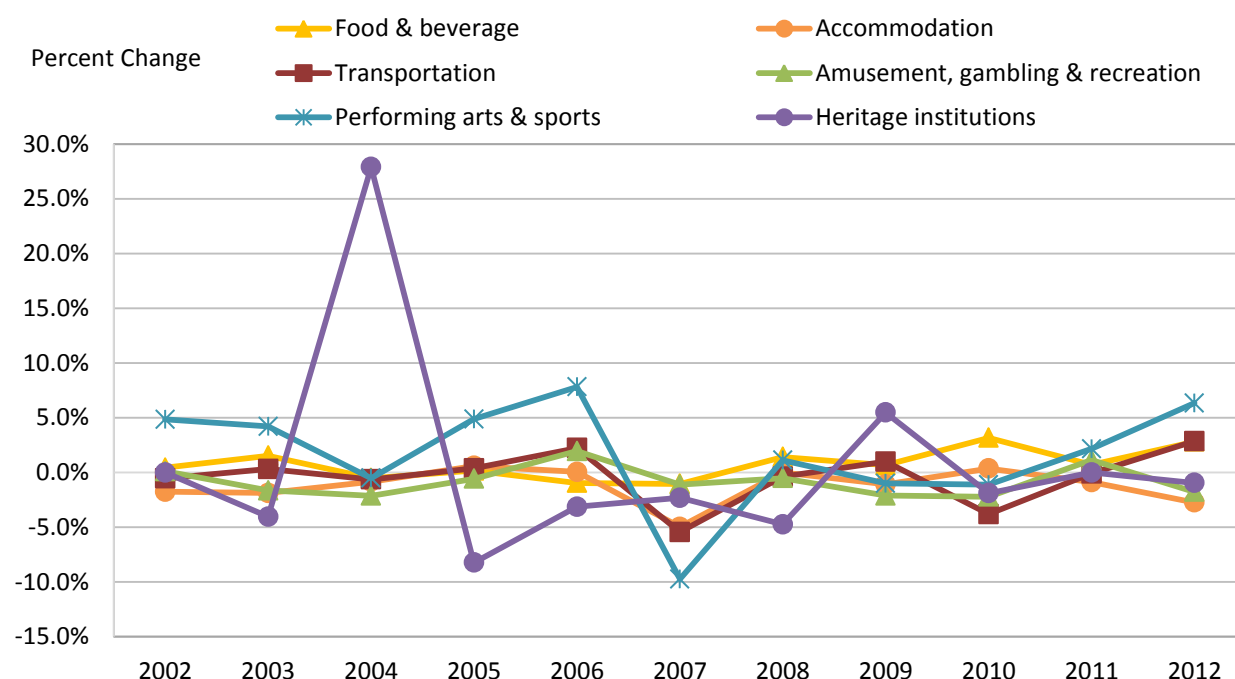
<sup>18</sup> The data on tourism-related establishments is based on the Statistics Canada Business Register, which uses slightly different coding for sectors compared with the revenue and GDP data.



net decrease in the number of tourism establishments, but the decline was less pronounced in the food and beverage sector, amusement, gambling and recreation sector, and heritage institutions (Figure 16). See also Table 8, page 38. While the performing arts and sports sector experienced the largest decline in 2007, growth in nearly all other years 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 heritage properties), and also grew in 2009 (by 5.5%), but has been flat since then. Overall, the number of heritage institutions has grown by 4.0% since 2002.

The number of businesses in both the accommodation and transportation sectors have declined in the ten-year period from 2002 to 2012 (-11.0% and -3.8%, respectively), in large part due to declines in 2007 (and 2011 for the accommodation sector). Other than slight growth of 1.9% in 2006, the amusement, gambling and recreation sector has also been slowly but continually declining since 2002, for an overall decrease of 8.7%.

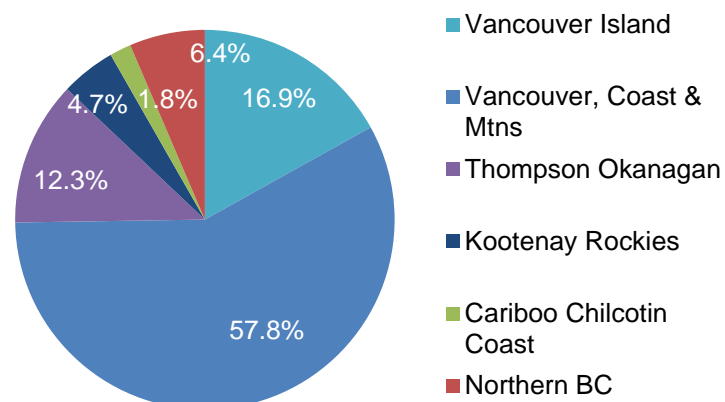
**FIGURE 16: TOURISM BUSINESS GROWTH RATES BY SECTOR (2002 TO 2012)**



## Tourism businesses by region

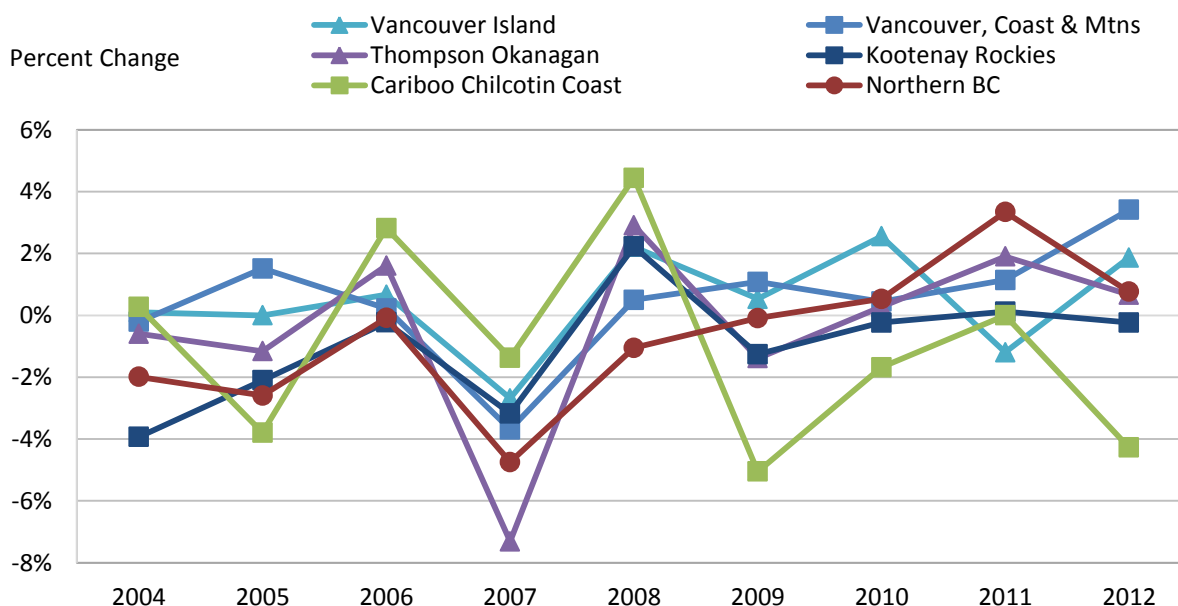
More than half of British Columbia's tourism-related businesses are located in the Vancouver, Coast & Mountains region (Figure 17). This region and the two other largest regions (Vancouver Island and the Thompson Okanagan) account for 87.1% of British Columbia's tourism establishments. The Vancouver, Coast & Mountains (3.4%), Vancouver Island (1.9%), Northern BC (0.8%), and the Thompson Okanagan (0.7%) regions all saw growth in tourism businesses in 2012 (over 2011), while the Kootenay Rockies and the Cariboo, Chilcotin Coast dropped (-0.6% and -4.3%, respectively) in 2012 over 2011.

FIGURE 17: SHARE OF 2012 TOURISM BUSINESSES BY REGION



Since 2003<sup>19</sup>, the number of tourism establishments has increased by 4.0% in the Vancouver Island region and 4.4% in the Vancouver, Coast & Mountains region (Figure 18). See also Table 9, page 39. The Cariboo Chilcotin Coast (-8.7%), the Kootenay Rockies (-8.6%), Northern BC (-6.0%), and the Thompson Okanagan (-3.4%) have each experienced declines in the number of tourism establishments since 2003.

FIGURE 18: TOURISM BUSINESS GROWTH RATES BY REGION (2004 TO 2012)



<sup>19</sup> The number of businesses without geocoding (the process of assigning latitude and longitude to a point to provide geographic coordinates for an address) decreased dramatically in 2003. Specifically, standard geographic coding was not available for 1,708 businesses in 2001 and 1,741 in 2002, but dropped to 23 in 2003. Therefore, the number of businesses by tourism region is not reported before 2003.

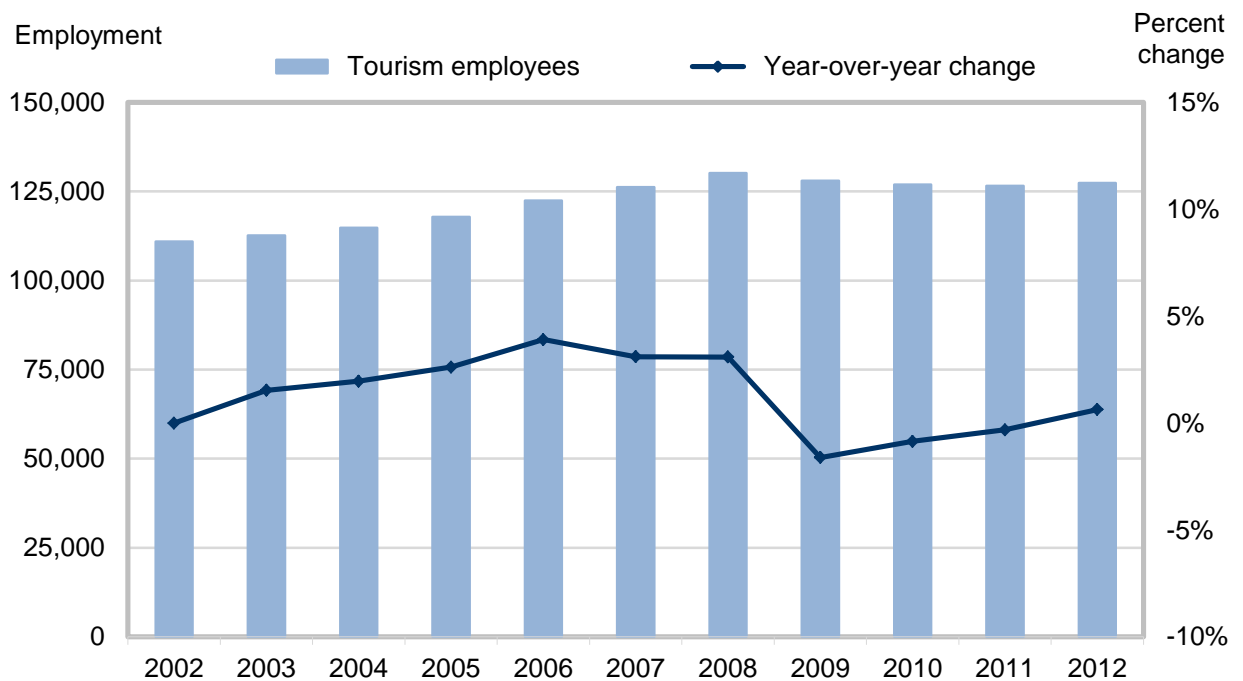
## TOURISM EMPLOYMENT

### Direct employment

Direct tourism employment measures the number of people working in the four tourism-related sectors due to tourism activities. Employment statistics are generated by assigning a percentage of total employment in each sector to the tourism industry.

In 2012, British Columbia tourism industry employment was 127,300, a 0.6% increase from 2011 (Figure 19).<sup>20</sup> Since 2002, the number of people employed in the tourism industry has grown by 14.8%. Between 2002 and 2012, employment in the tourism industry peaked in 2008 at 130,100. Since then, employment has declined by 2.2%, with fewer people employed in 2009, 2010, 2011, and 2012. See also Table 1, page 32.

FIGURE 19: EMPLOYMENT IN THE TOURISM INDUSTRY AND YEAR-OVER-YEAR CHANGE (2002 TO 2012)



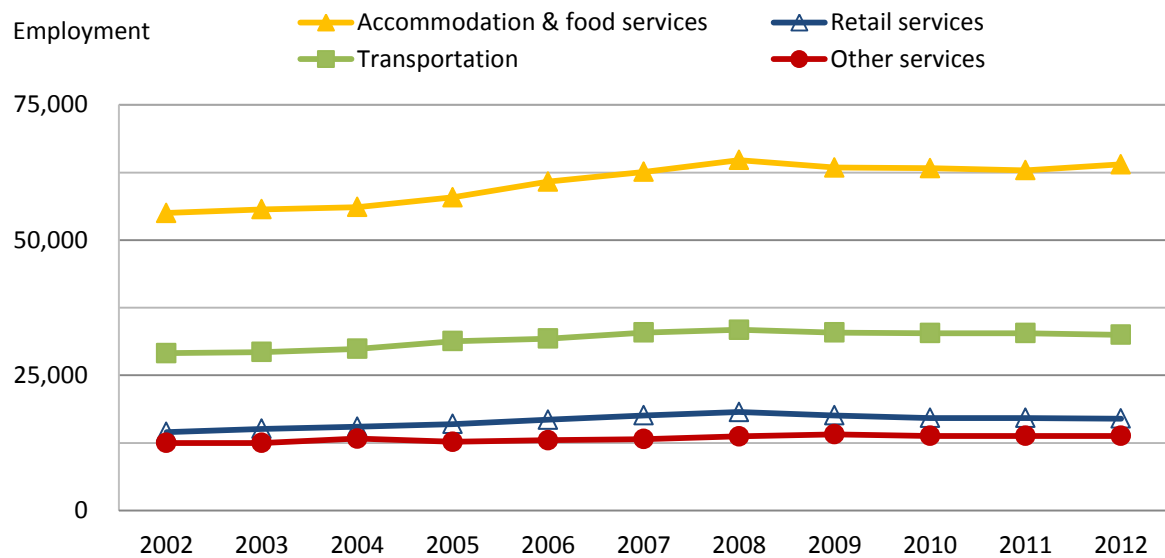
<sup>20</sup> Tourism employment estimates are developed from Statistics Canada's Survey of Employment, Payroll and Hours (SEPH), and are derived from information on payroll deductions. SEPH may under-report employment, as it does not include self-employed workers, who do not make payroll deductions. 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.

## Tourism employment by sector

The accommodation and food services sector accounts for half of all tourism employment in British Columbia, while the transportation sector accounts for another quarter (Figure 20).

Since 2002, the number of employees has grown by 17.2% in the retail services, 16.4% in the accommodation and food services, 11.7% in the transportation sector, and by 10.4% in other services. See also Table 10, page 40.

FIGURE 20: TOURISM EMPLOYMENT BY SECTOR (2002 TO 2012)





## Tourism employment by region

As with the number of tourism establishments, the Vancouver, Coast & Mountains region has the largest share of British Columbia tourism employment (63.8%), and is followed by Vancouver Island (13.2%) and the Thompson Okanagan (11.5%) (Figure 21). Combined, these three regions account for 88.5% of all tourism employment in British Columbia.

In 2012, tourism employment, and shares by region, remained fairly similar to the previous year. There was no change at all in the Thompson Okanagan, while there was a slight increase in tourism employment in the Vancouver, Coast & Mountains (2.9%), and slightly larger increase in the Cariboo Chilcotin Coast (5.0%). The biggest change was seen on Vancouver Island, with a 6.1% drop from 2011. Northern BC and the Kootenay Rockies also experienced declines in tourism employment in 2012 (-2.8% and -1.7%, respectively).

Despite fluctuation in the number of employees in each region since 2002, the ten-year period shows growth in all but one region. Substantial growth occurred in the Cariboo Chilcotin Coast (50.0%), Vancouver, Coast & Mountains (19.4%), Thompson Okanagan (16.5%), the Kootenay Rockies (14.0%) and Northern BC (11.3%). Vancouver Island saw a decline of 5.1% in 2012 from 2002 (Figure 22). See also Table 11, page 41.

FIGURE 21: SHARE OF 2012 TOURISM EMPLOYMENT BY REGION

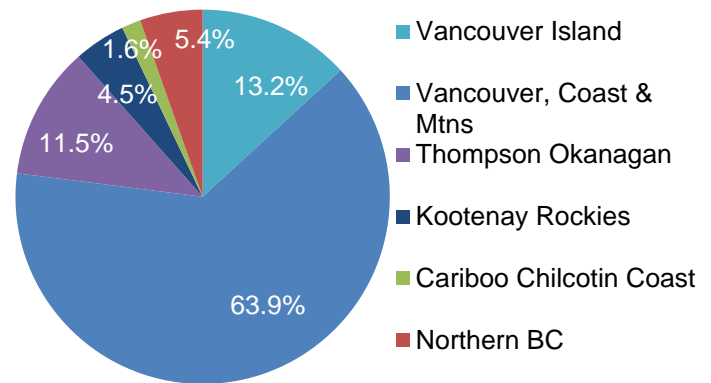
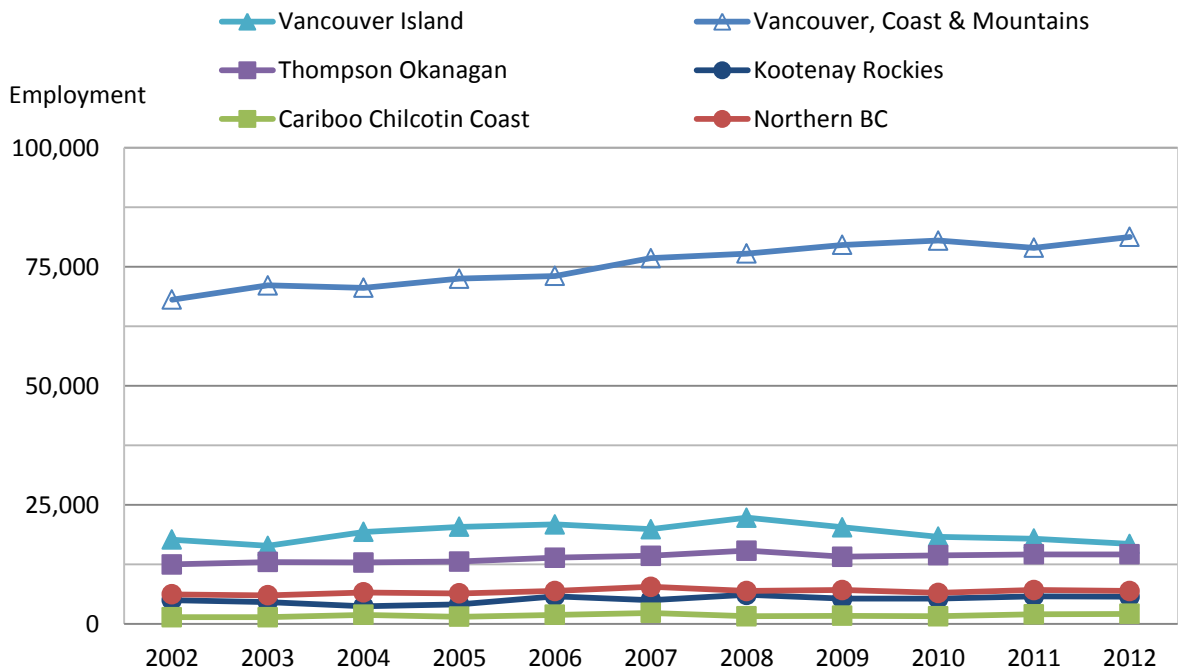


FIGURE 22: TOURISM EMPLOYMENT BY REGION (2002 TO 2012)



## Wages and salaries

The tourism industry paid \$4.3 billion in wages and salaries in 2012.<sup>21</sup> While the number of employees increased slightly (0.6%) from 2011, earnings increased substantially (4.0%) (Figure 23).

While tourism wages and salaries posted an increase of 30.5% since 2002, the growth in compensation has not been steady. Earnings dropped in 2002, rebounded in 2003, and continued to grow by an average of 4.7% from 2004 through 2008. Wages and salaries dropped during the 2009 economic downturn, picked up again in 2010. See also Table 1, page 32.

**FIGURE 23: WAGES & SALARIES PAID IN THE INDUSTRY AND YEAR-OVER-YEAR CHANGE (2002 TO 2012)**

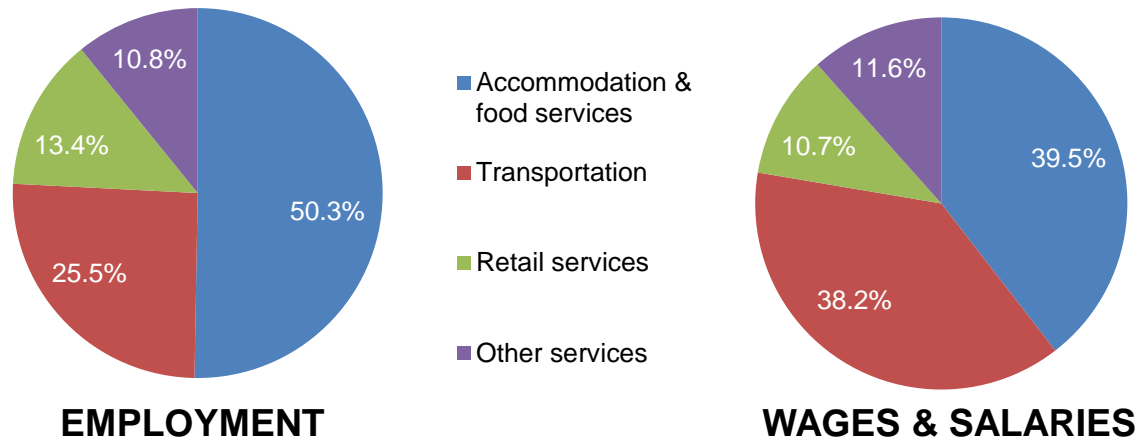


<sup>21</sup> Source: BC Stats.

## Tourism salaries by sector

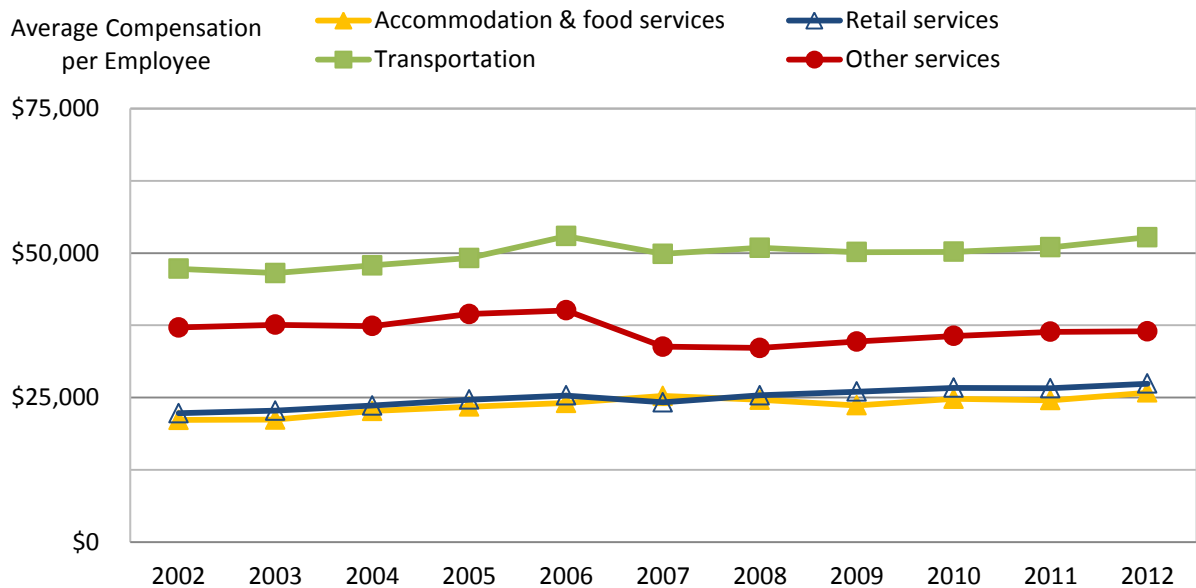
As mentioned earlier, the accommodation and food services sector comprises half of all tourism businesses; however, this sector only earns 39.5% of tourism wages and salaries. In contrast, the transportation sector accounts for 25.5% of tourism establishments but takes 38.2% of tourism earnings (Figure 24). See also Table 12, page 42.

**FIGURE 24: SHARE OF 2012 TOURISM EMPLOYMENT AND SALARIES BY SECTOR**



While the average compensation per employee in all tourism sectors has increased since 2002, the average compensation within transportation has been more than double the figure for accommodation and food (Figure 25). Since 2002, growth in average earnings has been highest in retail services (23.1% increase in the ten-year period), followed by accommodation and food services (22.4%), and transportation (11.5%). The other services sector has seen substantial declines since 2002 (-1.8%).

**FIGURE 25: AVERAGE COMPENSATION PER EMPLOYEE BY SECTOR (2002 TO 2012)**



## 4. Market origin

Market origin data is captured through visitor surveys. Destination British Columbia relies on two surveys<sup>22</sup> conducted by Statistics Canada:

- International Travel Survey (ITS): an exit survey for some international visitors and an entry and mail return 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 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<sup>23</sup> estimates.

There are also differences in estimates of tourism expenditures/revenues between Statistics Canada (demand-side estimates) and the 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 TRSC.
- Trips by Canadians that include a component in British Columbia but have a destination outside Canada are not included in the TRSC.
- Pre-trip expenditures on durable goods for tourism purposes are not included in the TRSC.
- 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.

Therefore, market 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 international, domestic and all travellers to British Columbia. This section also reports tourism expenditures by origin from the visitor surveys to provide a more complete picture of British Columbia's tourism markets.

*Domestic data for 2012 is preliminary. An updated version of this report will be made available when final data is provided.*

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<sup>22</sup> Please visit Statistics Canada's website for more information on the ITS Frontier counts, the ITS mail-back questionnaire and air exit surveys, as well as the TSRC questionnaire.

<sup>23</sup> Trip expenditures (from the visitor's perspective) are the flip side of tourism revenues (from the BC economy's perspective).

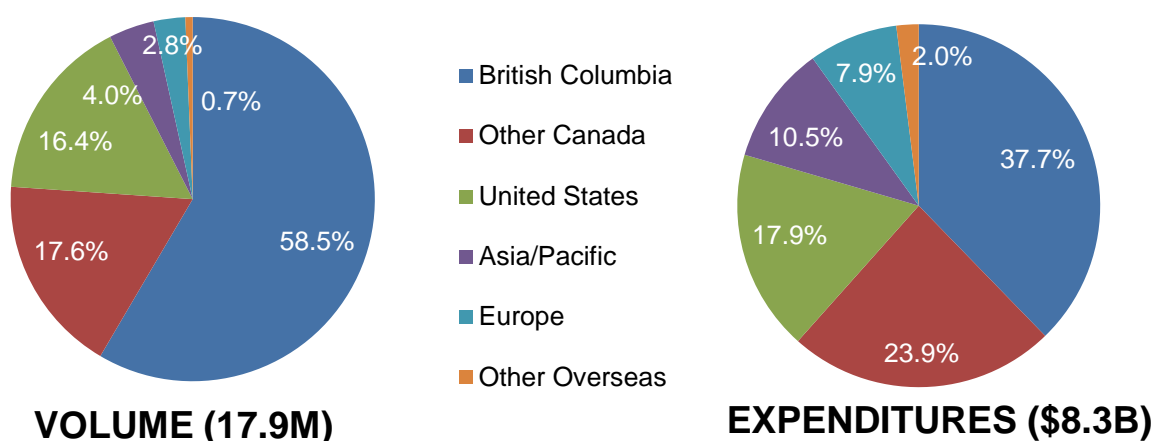


Detailed tables of market origin are available in Appendix A; Tables 1, and 13 through 18 are specific to the information covered in this section.

### Overall visitor volume and expenditures

In 2012, there were 17.9 million overnight visitors in British Columbia, an increase of 1.1% over 2011, who spent \$8.3 billion, a decline of 2.4% from 2011<sup>24</sup>. Over half of the visitors (58.5%) were British Columbia residents (Figure 26). Visitors from other parts of Canada accounted for 17.6% of all visits, while international visitors accounted for the remaining 23.9% of visitor volume. However, international visitors accounted for 38.4% of visitor expenditures. British Columbia residents accounted for 37.7% and Canadian residents accounted for 23.9% of visitor expenditures.

FIGURE 26: OVERALL VISITOR VOLUME AND EXPENDITURES BY MARKET ORIGIN (2012)



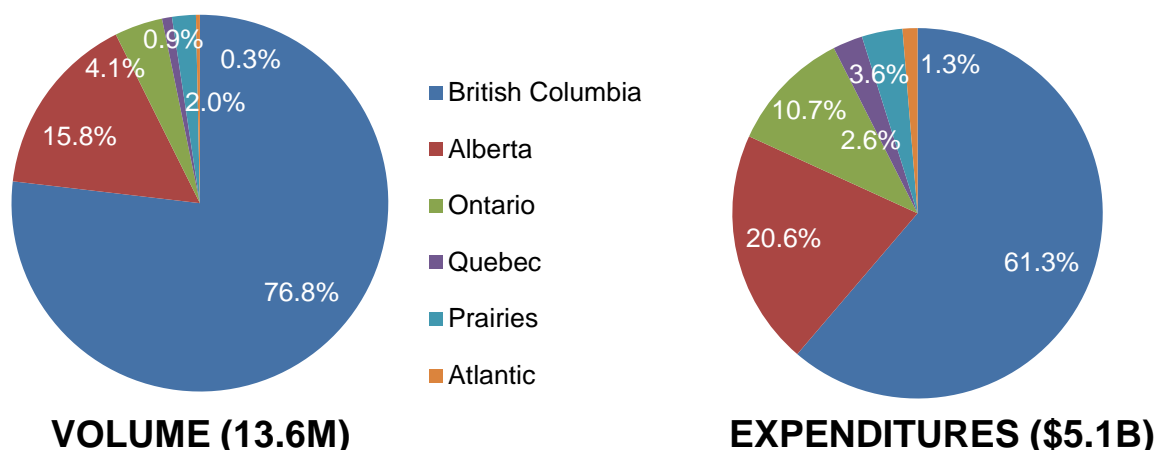
### Domestic Markets: visitor volume and expenditures

*Domestic data for 2012 is preliminary. An updated version of this report will be made available when final data is available.*

Overnight visitors from Canada accounted for over 13.5 million travellers in 2012, a 1.3% increase from 2011. Of travellers from Canada, British Columbia residents made up the largest share of visitor volume (76.8%) and expenditures (61.3%) in 2012 (Figure 27). Alberta was the second largest domestic market of overnight visitors to British Columbia, representing 15.8% of the Canadian visitor volume and 20.6% of expenditures. Overall, visitors from Canada spent about 4.0% less in 2012 than in 2011.

<sup>24</sup> 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 and therefore, time series data is not available for domestic markets. *2012 domestic data is preliminary. An updated version of this report will be made available when final data is available. Revisions to 2012 domestic overnight visitor volume and expenditures, and overall overnight visitor volume and expenditures will occur.*  
Source of international data: Statistics Canada, International Travel Survey.

**FIGURE 27: SHARE OF 2012 DOMESTIC VISITOR VOLUME AND EXPENDITURES BY MARKET ORIGIN**

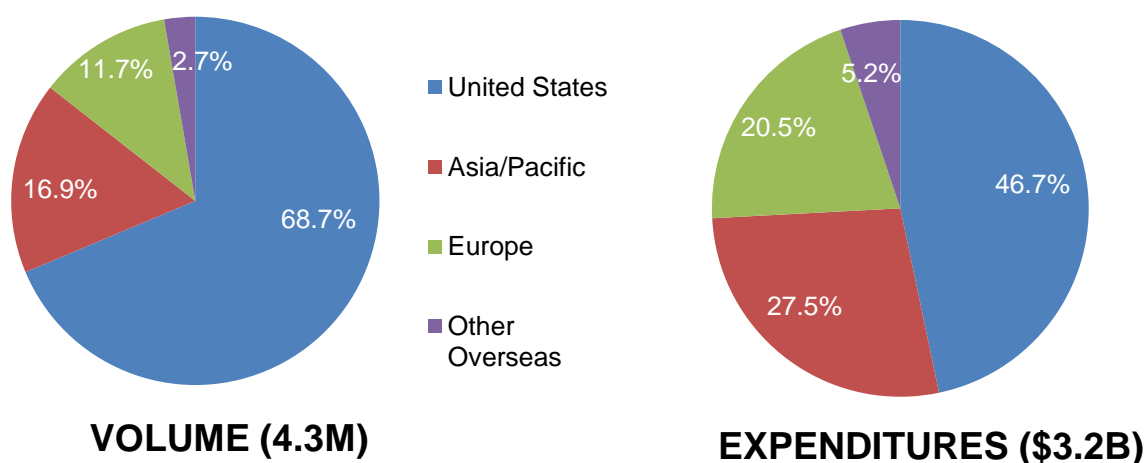


### International markets: visitor volume and expenditures

In 2012, over 4.3 million international overnight visitors came to British Columbia. The number of international visitors increased by 0.5% from 2011, but has declined by 12.8% from 2007, and by 19.9% since 2002.<sup>25</sup> With expenditures at \$3.2 billion, international visitors spent 0.2% more in 2012 than in 2011, and less than in either 2007 (-7.6%) or 2002 (-12.8%).

The United States is the largest overnight international market for British Columbia, comprising 68.7% of international visitor volume and 46.7% of expenditures in 2012 (Figure 28). Asia/Pacific and Europe comprise 28.6% of the international market and almost half of expenditures (48.1%), while other overseas markets account for the remaining small portion.

**FIGURE 28: SHARE OF 2012 INTERNATIONAL VISITOR VOLUME AND EXPENDITURES BY MARKET ORIGIN**



<sup>25</sup> Unlike domestic data, international data is available for the entire 10-year period referred to in this report. Therefore, comparisons are provided back one year (to 2011) and back ten years (to 2002) to complement the majority of this report. Due to recent methodological survey changes with the ITS, quantifying a 10-year trend is not feasible.

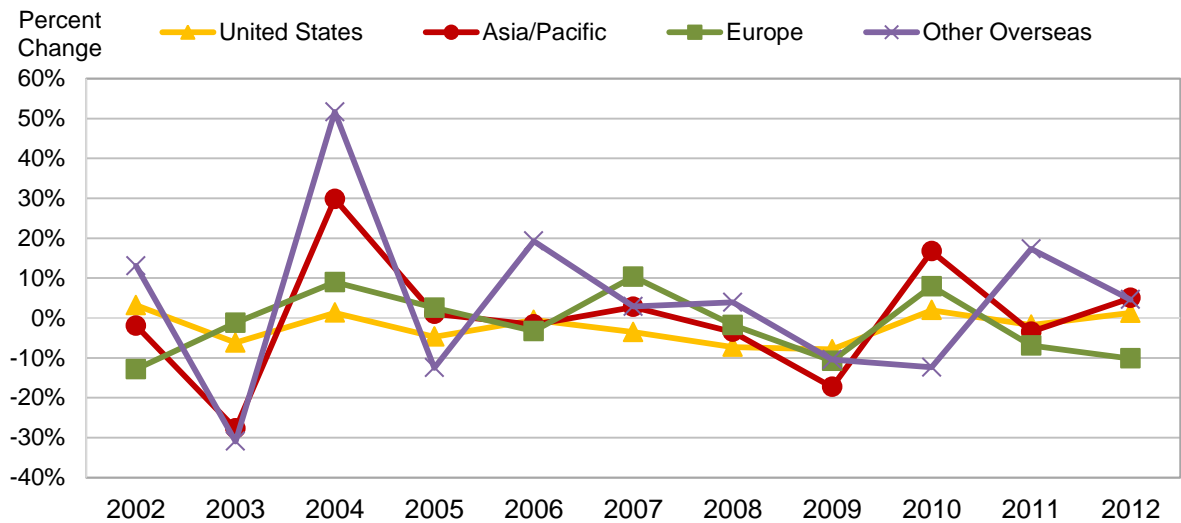
Over the past decade, the number of United States visitors has declined in all years except slight increases in 2004 (1.3%), 2010 (1.9%) and 2012 (1.3%). United States visitor expenditures increased by 1.9% in 2012 (Figure 29 and Figure 30). Overall, United States expenditures have declined by 10.6% from 2007 and 27.0% since 2002. Within the United States, Washington and California are the largest markets, representing 55.5% of United States visitor volume and 47.0% of expenditures in 2012. See also tables 1 and 15 through 18.

In 2012, the number of visitors from the Asia/Pacific increased by 5.0% and expenditures grew by 1.5%. Although volume is lower in 2012 than in 2007 (-5.6%) or 2002 (-9.5%), expenditures are up 4.2% from 2007 and are even with 2002 (0.2%). In 2012, several markets in the Asia/Pacific have experienced strong growth in visitation since 2011, such as New Zealand (45.8%), China (19.1%) and Hong Kong (8.2%).

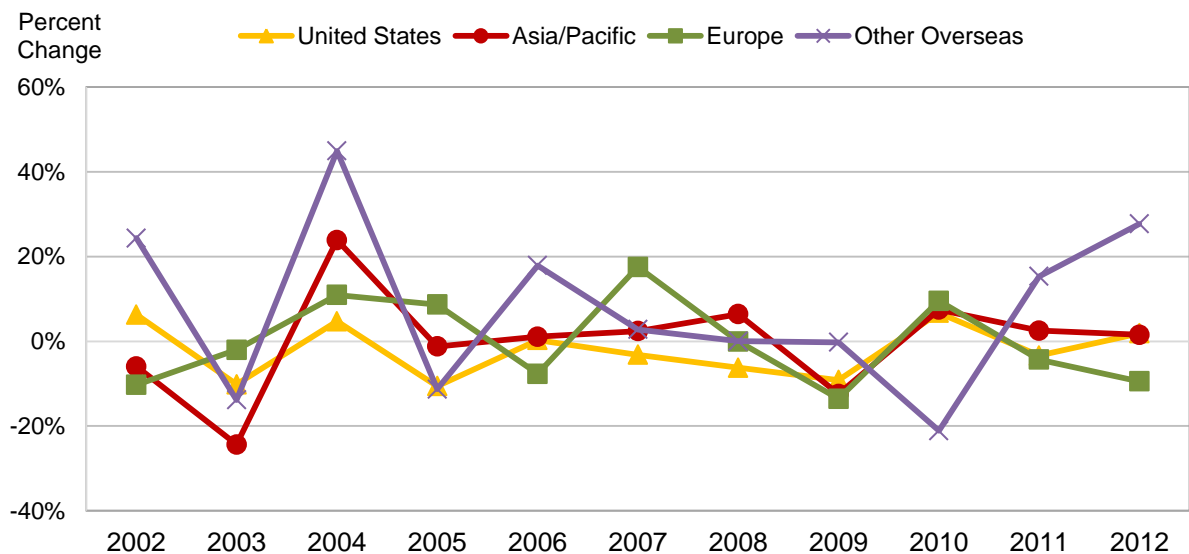
Visitor volume from Europe dropped by 10.2% in 2012 (over 2011), by 20.9% over 2007, and 6.8% over 2002. Visitors from Europe spent 9.5% less in 2012 than in 2011, these expenditures are a 18.1% decline from 2007, but 5.1% growth since 2002. Most major European markets experienced declines during the economic downturn in 2009, but most bounced back in 2010. The United Kingdom is the largest European market, representing 38.7% of the European visitor volume and 36.7% of visitor revenues in 2012. However, United Kingdom visitor volume has decreased by 40.0% from 2007 and 23.5% since 2002, while expenditure declined by 38.1% from 2007 and 19.8% from 2002. In contrast, both visitor volume and expenditures increased in 2012 over 2002 in both of the Netherlands and France markets. While German visitor volume has dropped from both 2007 (-3.9%) and 2002 (-9.0%) levels, German visitor expenditures are 22.9% higher than they were in 2007.

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. In 2012, Mexico visitor volume has grown over 2002 by 6.5%, but has decreased by 16.6% from 2007. 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 and substantial growth in 2012 (35.2%). Expenditures from the Mexico market have shown substantial growth since 2002 (55.1%) and moderate growth since 2007 (7.3%).

**FIGURE 29: INTERNATIONAL VISITOR VOLUME GROWTH RATES BY MARKET ORIGIN (2002 TO 2012)**



**FIGURE 30: INTERNATIONAL VISITOR EXPENDITURE GROWTH RATES BY MARKET ORIGIN (2002 TO 2012)**



## 5. Summary

This report presents the economic value of tourism in British Columbia through measures of revenue generated (whether that revenue be 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 origin.

This report provided current values, and changes relative to one and ten years ago.

Tourism Indicators	2012	% Change from 2011	% Change from 2002
Total Tourism Revenue	\$13.5B	↑ 2.5%	↑ 40.5%
Accommodation Room Revenue <sup>A</sup>	Data not available		
Municipal Regional District Tax Revenue <sup>A</sup>	\$1.5B	↑ 1.6%	NA
Provincial Tax Revenue	\$1.2B	↑ 4.7%	↑ 72.6%
Export Revenue	\$3.2B	↑ 0.2%	↓ 12.6%
Gross Domestic Product (2007 constant dollars)	\$7.1B	↑ 1.5%	↑ 4.4% <sup>C</sup>
Tourism-Related Businesses	18,387	↑ 2.0%	↑ 2.2%
Tourism Employment	127,300	↑ 0.6%	↑ 14.8%
Tourism Wages & Salaries	\$4.3B	↑ 4.0%	↑ 30.5%
Average Tourism Compensation	\$34K	↑ 3.3%	↑ 13.7%
Domestic Visitor Volume <sup>B</sup>	13.6M	↑ 1.3%	NA
International Visitor Volume	4.3M	↑ 0.5%	↓ 19.9%
Domestic Visitor Expenditures <sup>B</sup>	\$5.1B	↓ 4.0	NA
International Visitor Expenditures	\$3.2B	↑ 0.2%	↓ 12.6%

<sup>A</sup> Estimates of provincial accommodation room revenue are no longer available due to the elimination of the Hotel Room Tax (HRT), which was repealed on June 30, 2010. Room revenue data is provided only for those urban communities that collected Municipal Regional District Tax (MRDT) in 2010 and 2011, other than those in the Cariboo Chilcotin Coast region. 2012 MRDT data is not yet available; an updated version of this report will be made available when data is available.

<sup>B</sup> Preliminary domestic market origin data (visitor volume and expenditures) were available at time of publication of this report. Final data will be used to update this report when available. A new methodology used to produce domestic visitor data in this table and elsewhere in this report does not permit comparison to years before 2011.

<sup>C</sup> Percent change from 2007 (not 2002); Pre-2007 real GDP data is not yet available.

## Tourism Revenues and GDP

Tourism revenue measures the money received due to tourism activities, by businesses, individuals and governments. Accurate tourism revenues are difficult to obtain, as several sectors contribute to the industry. As of 2012, tourism revenue estimates have been based on a supply-side approach by which BC Stats applies a specific tourism proportion to each sector's revenue, which is calculated directly from annual and monthly business data.

- Total tourism revenue totalled \$13.5 billion in 2012.
  - 32.9% was generated by the accommodation and food services sector, 31.6% by transportation, and 27.5% by retail services.
- Accommodation room revenue earned by properties in communities that have utilized the Municipal Regional District Tax (MRDT) in five of the six tourism regions generated \$1.5 billion in 2012.<sup>26</sup>
- Tourism-related provincial tax revenue was \$1.2 billion in 2012.
- Tourism export revenue totalled \$3.2 billion in 2012.
  - Agriculture and fish products (\$2.7B) and mineral products (\$3.5B) generated similar export revenues, while forest products (\$10.2B) and energy demand (\$8.1B) both remained as larger primary resource commodities for British Columbia.
- Tourism industry contributed \$7.1 billion of added value in gross domestic product in 2012; this is more than other primary resource industries except mining, oil and gas extraction.
  - 36.2% was accounted for by the accommodation and food services sector 35.5% by transportation, and 10.2% by retail services.
  - Agriculture and fish products contributed 18.2% tourism industry's contribution to GDP (\$1.2B), forestry contributed a quarter of what tourism did (\$1.6B), while mining, oil and gas extraction contributed more to GDP than the tourism industry (\$10.9B).

## Tourism Businesses and Employment

The tourism industry supports a wide range of small, medium and large businesses, and provides jobs across the province. Direct tourism employment measures the number of people working due to tourism activities in the four tourism-related sectors.

- 18,387 tourism-related businesses were in operation in British Columbia in 2012.
  - 34.7% had 1 to 4 employees, 21.9% had 5 to 9 employees, 19.9% employed 10 to 19 people, and 16.0% employed 20 to 49 people.
  - 57.5% of businesses were in the Vancouver, Coast & Mountains region, 16.9% on Vancouver Island and 12.3% in the Thompson Okanagan.
  - 65.8% of establishments were in the accommodation & food sector, and 18.2% were of the transportation sector.
- 127,300 people were employed in the tourism industry in 2012.

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<sup>26</sup> 2012 MRDT data breakdown for tourism regions is not yet available; an updated version of this report will be made available when the data is provided to Destination British Columbia.

- 50.3% of employment was in accommodation and food services, 25.5% were in transportation, and 13.4% were in retail services.
- 63.9% of employment was in the Vancouver, Coast & Mountains region, 13.2% on Vancouver Island, and 11.5% in the Thompson Okanagan.
- \$4.3 billion was paid in wages and salaries in the tourism industry in 2012.
  - 39.5% of wages and salaries was paid in the transportation sector, 38.2% was paid in the accommodation and food sector, and 10.7% went to retail services.
- Average annual compensation in the tourism industry in 2012 was \$34,069.
  - Transportation earned the highest average compensation (\$53K), followed by retail services (\$27K), and accommodation and food services (\$26K).

### **Domestic and International Overnight Visitors and Expenditures**

Overnight travellers to British Columbia (i.e., one or more nights were spent in British Columbia) can be either international or domestic visitors, and visit for a variety of purposes (i.e., leisure, business, personal).

- 13.6 million domestic tourists visited British Columbia in 2012, and spent \$5.1 billion.
  - 76.8% were British Columbia residents, 15.8% were from Alberta, 4.1% from Ontario, 2.0% from the Prairies, and less than 1% each from either Quebec (0.9%) or the Atlantic (0.3%).
  - 61.3% of expenditures were from British Columbia residents, 20.6% was spent by Albertans, 10.7% by the Ontario market, 3.6% by Prairie visitors, 2.6% by Quebecois, and 1.3% by Atlantic visitors.
- 4.3 million international tourists visited British Columbia in 2012, and spent \$3.2 billion.
  - 68.7% were from the United States (mainly Washington and California), 16.9% were from Asia/Pacific, 11.7% from Europe (mainly the United Kingdom and Germany), 1.3% from Mexico, and 2.7% from other overseas markets.
  - 46.7% of expenditures were from United States visitors, 27.5% was spent by the Asia/Pacific, 20.7% by Europeans, 2.8% by Mexicans, and 2.3% by other overseas markets.



## **APPENDIX A**

### **Detailed tables**

## Contents of Appendix

Table 1: Summary of key economic indicators for the tourism industry and year-over-year change .....	32
Table 2: Tourism revenue and year-over-year change by sector .....	33
Table 3: Comparing export revenues for BC's primary commodities.....	34
Table 4: Tourism GDP using 2007 dollars and year-over-year change by sector .....	35
Table 5: Comparing GDP of tourism sectors using an index (2007 = 100).....	36
Table 6: Comparing GDP of BC primary resource industries (2007 = 100) .....	36
Table 7: Tourism establishments and year-over-year change by business size .....	37
Table 8: Tourism establishments and year-over-year change by sector .....	40
Table 9: Tourism establishments and year-over-year change by region.....	40
Table 10: Tourism employment and year-over-year change by sector .....	40
Table 11: Tourism employment and year-over-year change by region.....	41
Table 12: Tourism wages and salaries and year-over-year change by sector .....	42
Table 13: Domestic visitor volume and year-over year change by market origin (2011 and 2012).....	43
Table 14: Domestic visitor expenditures and year-over year change by market origin (2011 and 2012)..	43
Table 15: International visitor volume by market origin .....	44
Table 16: International visitor volume year-over-year change by market origin .....	45
Table 17: International visitor expenditures by market origin .....	46
Table 18: International visitor expenditures year-over-year change by market origin.....	47

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

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Total revenue (\$ millions)	\$9,571	\$9,647	\$10,544	\$11,276	\$12,006	\$12,717	\$13,124	\$12,382	\$12,920	\$13,123	\$13,452
% change	1.7%	0.8%	9.2%	6.9%	6.5%	5.9%	3.2%	-5.7%	4.3%	1.6%	2.5%
Total provincial taxes (\$ millions)	\$687	\$702	\$766	\$816	\$885	\$925	\$897	\$855	\$906	\$1,133	\$1,186
% change	-1.7%	2.2%	9.1%	6.5%	8.5%	4.5%	-3.0%	-4.7%	6.0%	25.1%	4.7%
Tourism export revenue (\$ millions)	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049	\$3,240	\$3,194	\$3,201
% change	0%	-12%	11%	-5%	-1%	3%	-2%	-11%	6%	-1.4%	0.2%
Gross Domestic Product (GDP; \$2007 millions)						\$6,042	\$6,822	\$6,712	\$7,035	\$7,035	\$7,143
% change							-0.3%	-1.6%	4.8%	0.0%	1.5%
Total establishments	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,034	18,387
% change	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%	0.7%	0.5%	2.0%
Tourism employment ('000s)	110.9	112.6	114.8	117.8	122.4	126.2	130.1	128.0	126.9	126.5	127.3
% change	0.0%	1.5%	2.0%	2.6%	3.9%	3.1%	3.1%	-162%	-0.9%	-0.3%	0.6%
Wages and salaries (\$ millions)	\$3,324	\$3,353	\$3,566	\$3,788	\$4,091	\$4,093	\$4,215	\$4,095	\$4,164	\$4,171	\$4,337
% change	-1.0%	0.9%	6.4%	6.2%	8.0%	0.0%	3.0%	-2.8%	1.7%	0.2%	4.0%
International visitors ('000s)	5,345	4,844	5,149	4,983	4,951	4,911	4,630	4,175	4,364	4,262	4,282
% change	0.7%	-9.4%	6.3%	-3.2%	-0.6%	-0.8%	-5.7%	-9.8%	4.5%	-2.3%	0.5%

Source: BC Stats for all except International visitors (source: Statistics Canada).

Note: 2011 and 2012 revenue data and associated taxes are preliminary and subject to revision.

Note: Provincial taxes include income, hotel, gas, and other taxes.

Note: Pre-2007 real GDP data is not yet available.

**TABLE 2: TOURISM REVENUE AND YEAR-OVER-YEAR CHANGE BY SECTOR**

Sectors		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011p	2012p
Revenue (\$ millions)	Accommodation & food services	\$3,515	\$3,427	\$3,815	\$4,155	\$4,452	\$4,692	\$4,637	\$4,285	\$4456	\$4352	\$4430
	Transportation services	\$2,842	\$2,879	\$3,057	\$3,336	\$3,535	\$3,687	\$3,812	\$3,599	\$3860	4045.0	\$4246
	Retail services	\$2,491	\$2,573	\$2,754	\$2,924	\$3,138	\$3,396	\$3,615	\$3,432	\$3522	\$3656.0	\$3705
	Other services	\$722	\$768	\$919	\$861	\$882	\$943	\$1,060	\$1,066	\$1081	\$1071	\$1072
	<b>Overall</b>	<b>\$9,571</b>	<b>\$9,647</b>	<b>\$10,544</b>	<b>\$11,276</b>	<b>\$12,006</b>	<b>\$12,717</b>	<b>\$13,124</b>	<b>\$12,382</b>	<b>\$12,920</b>	<b>\$13,123</b>	<b>\$13,452</b>
% change	Accommodation & food services	-1.5%	1.3%	6.2%	9.1%	6.0%	4.3%	3.4%	-5.6%	7.3%	4.8%	5.0%
	Transportation services	2.2%	-2.5%	11.3%	8.9%	7.1%	5.4%	-1.2%	-7.6%	4.0%	-2.3%	1.8%
	Retail services	2.0%	3.3%	7.0%	6.2%	7.3%	8.2%	6.4%	-5.1%	2.6%	3.8%	1.3%
	Other services	11.1%	6.4%	19.7%	-6.3%	2.4%	6.9%	12.4%	0.6%	1.4%	-0.9%	0.1%
	<b>Overall</b>	<b>1.7%</b>	<b>0.8%</b>	<b>9.3%</b>	<b>6.9%</b>	<b>6.5%</b>	<b>5.9%</b>	<b>3.2%</b>	<b>-5.7%</b>	<b>4.3%</b>	<b>1.6%</b>	<b>2.5%</b>

Source: BC Stats.

Note: 2011 and 2012 revenue data are preliminary and subject to revision.

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

<b>BC Primary Commodities</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Forest industry	\$ 14,353	\$12,997	\$15,081	\$14,134	\$13,560	\$12,282	\$10,107	\$7,602	\$9,143	\$9,985	\$10,159
<i>Wood products</i>	<b>\$9,284</b>	<b>\$8,239</b>	<b>\$10,062</b>	<b>\$9,485</b>	<b>\$8,776</b>	<b>\$7,164</b>	<b>\$5,408</b>	<b>\$4,127</b>	<b>\$5,106</b>	<b>\$5,706</b>	<b>\$6,175</b>
<i>Pulp and paper products</i>	<b>\$5,069</b>	<b>\$4,758</b>	<b>\$5,019</b>	<b>\$4,649</b>	<b>\$4,784</b>	<b>\$5,118</b>	<b>\$4,699</b>	<b>\$3,475</b>	<b>\$4,037</b>	<b>\$4,279</b>	<b>\$3,985</b>
Agriculture and fish	\$2,420	\$2,371	\$2,416	\$2,371	\$2,422	\$2,332	\$2,484	\$2,424	\$2,524	\$2,512	\$2,721
<i>Agriculture and food</i>	<b>\$1,406</b>	<b>\$1,390</b>	<b>\$1,442</b>	<b>\$1,386</b>	<b>\$1,443</b>	<b>\$1,435</b>	<b>\$1,585</b>	<b>\$1,555</b>	<b>\$1,579</b>	<b>\$1,613</b>	<b>\$1,868</b>
<i>Fish products</i>	<b>\$1,014</b>	<b>\$981</b>	<b>\$974</b>	<b>\$985</b>	<b>\$978</b>	<b>\$897</b>	<b>\$899</b>	<b>\$869</b>	<b>\$945</b>	<b>\$898</b>	<b>\$853</b>
Metallic mineral products	\$1,420	\$1,535	\$2,089	\$2,705	\$3,581	\$3,430	\$3,336	\$2,503	\$3,163	\$3,492	\$3,456
Energy products	\$3,713	\$4,847	\$4,549	\$7,801	\$6,455	\$6,196	\$9,623	\$6,864	\$7,996	\$10,025	\$8,085
Tourism industry	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049	\$3,240	\$ 3,194	\$ 3,201

Source: BC Stats.

**TABLE 4: TOURISM GDP USING 2007 DOLLARS AND YEAR-OVER-YEAR CHANGE BY SECTOR**

<b>Sectors</b>		<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
GDP (\$ millions)	Accommodation & food services	\$2,599	\$2,562	\$2,507	\$2,593	\$2,539	\$2,584
	Transportation services	\$2,259	\$ 2,266	\$2,223	\$2,440	\$2,490	\$2,535
	Retail services	\$785	\$753	\$732	\$732	\$728	\$727
	Other services	\$1,199	\$1,240	\$1,251	\$1,271	\$1,278	\$1,297
	<b>Overall</b>	<b>\$6,842</b>	<b>\$6,822</b>	<b>\$6,712</b>	<b>\$7,035</b>	<b>\$7,035</b>	<b>\$7,143</b>
% change	Accommodation & food services		-1.4%	-2.1%	3.4%	-2.0%	1.8%
	Transportation services		0.4%	-0.8%	5.7%	3.2%	1.7%
	Retail services		-4.1%	-2.8%	-0.1%	-0.5%	0.0%
	Other services		-2.3%	0.3%	0.6%	-0.5%	2.0%
	<b>Overall</b>		<b>-0.5%</b>	<b>-1.3%</b>	<b>3.3%</b>	<b>0.2%</b>	<b>1.6%</b>

Source: BC Stats.

Note: Pre-2007 real GDP data is not yet available.

**TABLE 5: COMPARING GDP OF TOURISM SECTORS USING AN INDEX (2007 = 100)**

Sectors	2007	2008	2009	2010	2011	2012
Accommodation & food services	100	104	99	104	105	105
Transportation services	100	96	101	102	105	105
Retail services	100	101	105	105	109	111
Other services	100	96	101	102	105	105
<b>Tourism industry</b>	<b>100</b>	<b>101</b>	<b>102</b>	<b>104</b>	<b>106</b>	<b>106</b>

Source: BC Stats.

Note: Pre-2007 real GDP data is not yet available.

**TABLE 6: COMPARING GDP OF BC PRIMARY RESOURCE INDUSTRIES (2007 = 100)**

Industries		2007	2008	2009	2010	2011	2012
GDP (\$ millions)	Agriculture	\$1,243	\$1,222	\$1,229	\$1,252	\$1,260	\$1,238
	Forestry	\$1,998	\$1,776	\$1,212	\$1,509	\$1,653	\$1,643
	Mining, oil and gas extraction	\$9,727	\$10,014	\$8,853	\$10,196	\$11,063	\$10,863
	Tourism	\$6,842	\$6,822	\$6,712	\$7,035	\$7,035	\$7,143
Index (2007 = 100)	Agriculture	100	98	99	101	101	100
	Forestry	100	89	61	76	83	82
	Mining, oil and gas extraction	100	103	91	105	114	112
	Tourism	100	100	98	103	103	104

Source: BC Stats.

Note: Pre-2007 real GDP data is not yet available.



TABLE 7: TOURISM ESTABLISHMENTS AND YEAR-OVER-YEAR CHANGE BY BUSINESS SIZE

Business size		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Establishments	1 to 4 employees	7,737	8,302	7,995	8,177	8,256	6,179	6,121	6,177	6,208	6,182	6,386
	5 to 9 employees	3,260	3,234	3,266	3,133	3,170	3,886	3,816	3,823	3,830	3,897	4,021
	10 to 19 employees	2,991	3,038	3,007	2,980	2,937	3,538	3,687	3,684	3,576	3,636	3,664
	20 to 49 employees	2,563	2,235	2,408	2,454	2,438	2,691	2,744	2,744	2,949	2,958	2,943
	50 to 199 employees	1,316	1,178	1,221	1,204	1,220	1,230	1,248	1,230	1,226	1,223	1,238
	200 or more employees	129	127	138	146	166	138	158	156	154	138	135
	<b>Overall</b>	<b>17,996</b>	<b>18,114</b>	<b>18,035</b>	<b>18,094</b>	<b>18,187</b>	<b>17,662</b>	<b>17,774</b>	<b>17,814</b>	<b>17,943</b>	<b>18,034</b>	<b>18,387</b>
% change	1 to 4 employees	-1.3%	7.3%	-3.7%	2.3%	1.0%	-25.2%	-0.9%	0.9%	0.5%	-0.4%	3.3%
	5 to 9 employees	0.0%	-0.8%	1.0%	-4.1%	1.2%	22.6%	-1.8%	0.2%	0.2%	1.7%	3.2%
	10 to 19 employees	0.6%	1.6%	-1.0%	-0.9%	-1.4%	20.5%	4.2%	-0.1%	-2.9%	1.7%	0.5%
	20 to 49 employees	2.9%	-12.8%	7.7%	1.9%	-0.7%	10.4%	2.0%	0.0%	7.5%	0.3%	-0.5%
	50 to 199 employees	3.6%	-10.5%	3.7%	-1.4%	1.3%	0.8%	1.5%	-1.4%	-0.3%	-0.2%	1.2%
	200 or more employees	-1.5%	-1.6%	8.7%	5.8%	13.7%	-16.9%	14.5%	-1.3%	-1.3%	-10.4%	-2.2%
	<b>Overall</b>	<b>0.2%</b>	<b>0.7%</b>	<b>-0.4%</b>	<b>0.3%</b>	<b>0.5%</b>	<b>-2.9%</b>	<b>0.6%</b>	<b>0.2%</b>	<b>0.7%</b>	<b>0.5%</b>	<b>2.0%</b>

Source: BC Stats.

Note: The decrease in the number of tourism establishments with 1 to 4 employees in 2007 is attributed to the introduction of new “inactivation rules” in the redesigned Business Register, which is intended to detect inactive businesses as early as possible, resulting in more accuracy in reflecting the operating structure of businesses (<http://ivt.crepuq.qc.ca/industries/documentation/brengl3.pdf>).

**TABLE 8: TOURISM ESTABLISHMENTS AND YEAR-OVER-YEAR CHANGE BY SECTOR**

Sectors		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Establishments	Food & beverage	9,491	9,636	9,586	9,603	9,511	9,412	9,545	9,609	9,913	9,984	10,265
	Accommodation	2,071	2,032	2,015	2,027	2,028	1,927	1,927	1,906	1,913	1,896	1,844
	Transportation	3,483	3,494	3,472	3,485	3,563	3,369	3,356	3,389	3,260	3,257	3,350
	Amusement, gambling & recreation	1,824	1,794	1,756	1,746	1,780	1,760	1,751	1,714	1,676	1,695	1,665
	Performing arts & sports	929	968	963	1,010	1,089	983	994	984	973	994	1,057
	Heritage institutions	198	190	243	223	216	211	201	212	208	208	206
	<b>Overall</b>	<b>17,996</b>	<b>18,114</b>	<b>18,035</b>	<b>18,094</b>	<b>18,187</b>	<b>17,662</b>	<b>17,774</b>	<b>17,814</b>	<b>17,943</b>	<b>18,034</b>	<b>18,387</b>
% change	Food & beverage	0.4%	1.5%	-0.5%	0.2%	-1.0%	-1.0%	1.4%	0.7%	3.2%	0.7%	2.8%
	Accommodation	-1.8%	-1.9%	-0.8%	0.6%	0.0%	-5.0%	0.0%	-1.1%	0.4%	-0.9%	-2.7%
	Transportation	-0.5%	0.3%	-0.6%	0.4%	2.2%	-5.4%	-0.4%	1.0%	-3.8%	-0.1%	2.9%
	Amusement, gambling & recreation	0.1%	-1.6%	-2.1%	-0.6%	1.9%	-1.1%	-0.5%	-2.1%	-2.2%	1.1%	-1.8%
	Performing arts & sports	4.9%	4.2%	-0.5%	4.9%	7.8%	-9.7%	1.1%	-1.0%	-1.1%	2.2%	6.3%
	Heritage institutions	0.0%	-4.0%	27.9%	-8.2%	-3.1%	-2.3%	-4.7%	5.5%	-1.9%	0.0%	-1.0%
	<b>Overall</b>	<b>0.2%</b>	<b>0.7%</b>	<b>-0.4%</b>	<b>0.3%</b>	<b>0.5%</b>	<b>-2.9%</b>	<b>0.6%</b>	<b>0.2%</b>	<b>0.7%</b>	<b>0.5%</b>	<b>2.0%</b>

Source: BC Stats.

**TABLE 9: TOURISM ESTABLISHMENTS AND YEAR-OVER-YEAR CHANGE BY REGION**

Region		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Establishments	Vancouver Island	2,421	2,991	2,994	2,994	3,014	2,933	2,998	3,014	3,091	3,054	3,111
	Vancouver, Coast & Mtns	9,847	10,190	10,169	10,323	10,346	9,964	10,014	10,122	10,167	10,283	10,634
	Thompson Okanagan	2,037	2,343	2,329	2,302	2,339	2,168	2,231	2,200	2,206	2,248	2,263
	Kootenay Rockies	733	940	903	884	882	854	873	862	860	864	859
	Cariboo Chilcotin Coast	197	368	369	355	365	360	376	357	351	351	336
	Northern BC	1,020	1,259	1,234	1,202	1,201	1,144	1,132	1,131	1,137	1,175	1,184
	<i>Standard geographic coding not available</i>	<i>1,741</i>	<i>23</i>	<i>37</i>	<i>34</i>	<i>40</i>	<i>239</i>	<i>150</i>	<i>128</i>	<i>131</i>	<i>72</i>	<i>0</i>
<b>Overall</b>		<b>17,996</b>	<b>18,114</b>	<b>18,035</b>	<b>18,094</b>	<b>18,187</b>	<b>17,662</b>	<b>17,774</b>	<b>17,814</b>	<b>17,943</b>	<b>18,034</b>	<b>18,387</b>
% change	Vancouver Island				0.0%	0.7%	-2.7%	2.2%	0.5%	2.6%	-1.2%	1.9%
	Vancouver, Coast & Mtns	The number of businesses without geocoding decreased dramatically in 2003, creating spurious growth in number of establishments by region compared with 2002. Therefore, year-over-year change in 2001, 2001, and 2003 by region is not provided.			1.5%	0.2%	-3.7%	0.5%	1.1%	0.4%	1.1%	3.4%
	Thompson Okanagan				-1.2%	1.6%	-7.3%	2.9%	-1.4%	0.3%	1.9%	0.7%
	Kootenay Rockies				-2.1%	-0.2%	-3.2%	2.2%	-1.3%	-0.2%	0.5%	-0.6%
	Cariboo Chilcotin Coast				-3.8%	2.8%	-1.4%	4.4%	-5.1%	-1.7%	0.0%	-4.3%
	Northern BC				-2.6%	-0.1%	-4.7%	-1.0%	-0.1%	0.5%	3.3%	0.8%
	<b>Overall</b>	<b>0.2%</b>	<b>0.7%</b>	<b>-0.4%</b>	<b>0.3%</b>	<b>0.5%</b>	<b>-2.9%</b>	<b>0.6%</b>	<b>0.2%</b>	<b>0.7%</b>	<b>0.5%</b>	<b>2.0%</b>

Source: BC Stats.

**TABLE 10: TOURISM EMPLOYMENT AND YEAR-OVER-YEAR CHANGE BY SECTOR**

Sectors		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Employment	Accommodation & food services	55,000	55,700	56,100	57,900	60,800	62,600	64,800	63,400	63,300	62,900	64,000
	Transportation services	29,100	29,300	29,900	31,300	31,800	32,900	33,400	32,900	32,800	32,800	32,500
	Retail services	14,500	15,100	15,500	16,000	16,800	17,600	18,200	17,600	17,100	17,100	17,000
	Other services	12,500	12,500	13,300	12,700	13,000	13,200	13,700	14,100	13,800	13,800	13,800
	<b>Overall</b>	<b>110,900</b>	<b>112,600</b>	<b>114,800</b>	<b>117,800</b>	<b>122,400</b>	<b>126,200</b>	<b>130,100</b>	<b>128,000</b>	<b>126,900</b>	<b>126,500</b>	<b>127,300</b>
% change	Accommodation & food services	1.7%	1.3%	0.7%	3.2%	5.0%	3.0%	3.5%	-2.2%	-0.2%	-0.6%	1.7%
	Transportation services	-4.3%	0.7%	2.0%	4.7%	1.6%	3.5%	1.5%	-1.5%	-0.3%	0.0%	-0.9%
	Retail services	2.1%	4.1%	2.6%	3.2%	5.0%	4.8%	3.4%	-3.3%	-2.8%	0.0%	-0.6%
	Other services	1.6%	0.0%	6.4%	-4.5%	2.4%	1.5%	3.8%	2.9%	-2.1%	0.0%	0.0%
	<b>Overall</b>	<b>0.0%</b>	<b>1.5%</b>	<b>2.0%</b>	<b>2.6%</b>	<b>3.9%</b>	<b>3.1%</b>	<b>3.1%</b>	<b>-1.6%</b>	<b>-0.9%</b>	<b>-0.3%</b>	<b>0.6%</b>

Source: BC Stats.

**TABLE 11: TOURISM EMPLOYMENT AND YEAR-OVER-YEAR CHANGE BY REGION**

Region		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Tourism Employment	Vancouver Island	17,700	16,400	19,300	20,400	20,900	19,900	22,300	20,300	18,300	17,900	16,800
	Vancouver, Coast & Mountains	68,100	71,100	70,600	72,500	73,100	76,800	77,800	79,600	80,500	79,000	81,300
	Thompson Okanagan	12,500	13,000	12,900	13,100	13,900	14,300	15,400	14,100	14,400	14,600	14,600
	Kootenay Rockies	5,000	4,600	3,700	4,100	5,800	5,000	6,100	5,300	5,300	5,800	5,700
	Cariboo Chilcotin Coast	1,400	1,400	1,900	1,500	1,900	2,300	1,600	1,700	1,600	2,000	2,100
	Northern BC	6,200	6,000	6,600	6,400	6,900	7,800	6,900	7,100	6,500	7,100	6,900
	<b>Overall</b>	<b>110,900</b>	<b>112,600</b>	<b>114,800</b>	<b>117,800</b>	<b>122,400</b>	<b>126,200</b>	<b>130,100</b>	<b>128,000</b>	<b>126,900</b>	<b>126,500</b>	<b>127,300</b>
% change	Vancouver Island	10.6%	-7.3%	17.7%	5.7%	2.5%	-4.8%	12.1%	-9.0%	-9.9%	-2.2%	-6.1%
	Vancouver, Coast & Mountains	-3.4%	4.4%	-0.7%	2.7%	0.8%	5.1%	1.3%	2.3%	1.1%	-1.9%	2.9%
	Thompson Okanagan	16.8%	4.0%	-0.8%	1.6%	6.1%	2.9%	7.7%	-8.4%	2.1%	1.4%	0.0%
	Kootenay Rockies	-9.1%	-8.0%	-19.6%	10.8%	41.5%	-13.8%	22.0%	-13.1%	0.0%	9.4%	-1.7%
	Cariboo Chilcotin Coast	-22.2%	0.0%	35.7%	-21.1%	26.7%	21.1%	-30.4%	6.3%	-5.9%	25.0%	5.0%
	Northern BC	-6.1%	-3.2%	10.0%	-3.0%	7.8%	13.0%	-11.5%	2.9%	-8.5%	9.2%	-2.8%
	<b>Overall</b>	<b>0.0%</b>	<b>1.5%</b>	<b>2.0%</b>	<b>2.6%</b>	<b>3.9%</b>	<b>3.1%</b>	<b>3.1%</b>	<b>-1.6%</b>	<b>-0.9%</b>	<b>-0.3%</b>	<b>0.6%</b>

Source: BC Stats.

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

Sectors		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Wages & salaries (\$ millions)	Accommodation & food services	\$1,162	\$1,179	\$1,272	\$1,355	\$1,463	\$1,582	\$1,594	\$1,499	\$1568	\$1542	\$1655
	Transportation services	\$1,376	\$1,363	\$1,431	\$1,538	\$1,683	\$1,640	\$1,700	\$1,650	\$1647	\$1672	\$1714
	Retail services	\$323	\$343	\$366	\$394	\$426	\$425	\$462	\$458	\$456	\$455	\$466
	Other services	\$464	\$470	\$497	\$501	\$521	\$446	\$460	\$489	\$492	\$502	\$503
	<b>Overall</b>	<b>\$3,324</b>	<b>\$3,353</b>	<b>\$3,566</b>	<b>\$3,788</b>	<b>\$4,091</b>	<b>\$4,093</b>	<b>\$4,215</b>	<b>\$4,095</b>	<b>\$4,164</b>	<b>\$4,171</b>	<b>\$4,337</b>
% change	Accommodation & food services	-1.2%	1.5%	7.9%	6.5%	8.0%	8.1%	0.8%	-6.0%	4.6%	-1.7%	7.3%
	Transportation services	-3.3%	-0.9%	5.0%	7.5%	9.4%	-2.6%	3.7%	-2.9%	-0.2%	1.5%	2.5%
	Retail services	3.5%	6.2%	6.7%	7.7%	8.1%	-0.2%	8.7%	-0.9%	-0.4%	-0.2%	2.4%
	Other services	4.0%	1.3%	5.7%	0.8%	4.0%	-14.4%	3.1%	6.3%	0.6%	2.0%	0.2%
	<b>Overall</b>	<b>-1.0%</b>	<b>0.9%</b>	<b>6.4%</b>	<b>6.2%</b>	<b>8.0%</b>	<b>0.0%</b>	<b>3.0%</b>	<b>-2.8%</b>	<b>1.7%</b>	<b>0.2%</b>	<b>4.0%</b>

Source: BC Stats.

**TABLE 13: DOMESTIC VISITOR VOLUME AND YEAR-OVER YEAR CHANGE BY MARKET ORIGIN (2011 AND 2012)**

Market	Volume ('000s)		% change 2011-12
	2011	2012	
British Columbia	9,926	10,469	5.5%
Alberta	2,529	2,151	-14.9%
Ontario	530	563	6.2%
Quebec	109	116	6.4%
Prairies	297	278	-6.4%
Atlantic	52	46	-11.5%
<b>Overall</b>	<b>13,443</b>	<b>13,624</b>	<b>1.3%</b>

Source: Statistics Canada, Travel Survey of Residents of Canada. Methodological changes to the Travel Survey of Residents of Canada do not allow comparisons before 2011. Therefore, time series data is not available for domestic markets. Domestic data for 2012 is preliminary. An updated version of this report will be made available when final data is provided.

**TABLE 14: DOMESTIC VISITOR EXPENDITURES AND YEAR-OVER YEAR CHANGE BY MARKET ORIGIN (2011 AND 2012)**

Market	Expenditures (\$ millions)		% change 2011-12
	2011	2012	
British Columbia	\$3,273	\$3,145	-3.9%
Alberta	\$1,240	\$1,056	-14.8%
Ontario	\$469	\$550	17.4%
Quebec	\$128	\$134	4.4%
Prairies	\$193	\$182	-5.3%
Atlantic	\$48	\$67	39.7%
<b>Overall</b>	<b>\$5,350</b>	<b>\$5,134</b>	<b>-4.0%</b>

Source: Statistics Canada, Travel Survey of Residents of Canada. Methodological changes to the Travel Survey of Residents of Canada do not allow comparisons before 2011. Therefore, time series data is not available for domestic markets. An updated version of this report will be made available when final data is provided.



TABLE 15: INTERNATIONAL VISITOR VOLUME BY MARKET ORIGIN

Market		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Volume ('000)	<b>United States</b>	<b>3,904</b>	<b>3,663</b>	<b>3,711</b>	<b>3,536</b>	<b>3,518</b>	<b>3,394</b>	<b>3,147</b>	<b>2,899</b>	<b>2,955</b>	<b>2,904</b>	<b>2,941</b>
	Washington	1,577	1,422	1,393	1,332	1,257	1,201	1,187	1,153	1,134	1,152	1,208
	California	553	515	530	466	488	474	419	375	414	418	425
	Oregon	179	190	212	202	209	188	162	148	186	194	185
	Arizona	74	64	69	86	75	78	64	61	54	63	67
	Florida	102	107	108	104	93	91	93	65	85	84	67
	Texas	144	107	106	123	136	127	117	118	91	76	103
	<b>Asia/Pacific</b>	<b>799</b>	<b>577</b>	<b>750</b>	<b>757</b>	<b>744</b>	<b>765</b>	<b>738</b>	<b>611</b>	<b>713</b>	<b>688</b>	<b>723</b>
	Japan	264	149	200	204	183	172	125	84	105	86	90
	Taiwan	96	63	98	91	88	75	49	37	41	43	37
	Hong Kong	79	53	66	62	58	63	77	60	69	61	66
	Australia	93	92	107	113	119	144	142	129	126	137	138
	South Korea	103	94	104	107	120	110	104	73	94	88	88
	China	57	43	68	65	65	69	90	92	109	130	155
	New Zealand	14	21	18	21	23	25	36	31	35	24	35
	India	5	7	10	8	9	22	23	26	48	29	21
	<b>Europe</b>	<b>539</b>	<b>533</b>	<b>580</b>	<b>595</b>	<b>576</b>	<b>635</b>	<b>624</b>	<b>557</b>	<b>601</b>	<b>559</b>	<b>502</b>
	United Kingdom	254	258	288	298	289	324	293	235	231	216	194
	Germany	107	103	116	111	104	101	112	111	120	102	98
	Netherlands	36	40	45	43	45	48	50	43	50	41	36
	France	21	23	24	17	19	23	27	25	31	35	30
	<b>Mexico</b>	<b>54</b>	<b>27</b>	<b>57</b>	<b>59</b>	<b>62</b>	<b>69</b>	<b>82</b>	<b>64</b>	<b>54</b>	<b>55</b>	<b>57</b>
	<b>Other overseas</b>	<b>50</b>	<b>45</b>	<b>51</b>	<b>35</b>	<b>51</b>	<b>48</b>	<b>39</b>	<b>44</b>	<b>41</b>	<b>56</b>	<b>59</b>
	<b>TOTAL INTERNATIONAL</b>	<b>5,345</b>	<b>4,844</b>	<b>5,149</b>	<b>4,983</b>	<b>4,951</b>	<b>4,911</b>	<b>4,630</b>	<b>4,175</b>	<b>4,364</b>	<b>4,262</b>	<b>4,282</b>

Source: Statistics Canada: International Travel Survey.

TABLE 16: INTERNATIONAL VISITOR VOLUME YEAR-OVER-YEAR CHANGE BY MARKET ORIGIN

Market		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	02-12
Volume (% change)	<b>United States</b>	<b>3.2%</b>	<b>-6.2%</b>	<b>1.3%</b>	<b>-4.7%</b>	<b>-0.5%</b>	<b>-3.5%</b>	<b>-7.3%</b>	<b>-7.9%</b>	<b>1.9%</b>	<b>-1.8%</b>	<b>1.3%</b>	<b>-24.7%</b>
	Washington	2.9%	-9.8%	-2.0%	-4.4%	-5.7%	-4.5%	-1.2%	-2.8%	-1.7%	1.6%	4.9%	-23.4%
	California	2.9%	-9.8%	-2.0%	-4.4%	-5.7%	-4.5%	-1.2%	-2.8%	-1.7%	1.6%	4.9%	3.4%
	Oregon	-6.2%	5.8%	11.7%	-4.8%	3.4%	-9.9%	-13.7%	-9.0%	25.7%	4.7%	-4.5%	-23.1%
	Arizona	-1.9%	-13.5%	7.1%	25.4%	-13.2%	4.1%	-18.2%	-4.6%	-10.5%	16.1%	5.9%	-9.8%
	Florida	61.2%	4.4%	1.1%	-4.1%	-9.7%	-2.5%	2.1%	-29.6%	29.8%	-0.6%	-20.5%	-34.4%
	Texas	22.1%	-25.7%	-0.6%	15.2%	11.2%	-7.1%	-7.5%	0.2%	-22.5%	-16.8%	35.4%	-28.8%
	<b>Asia/Pacific</b>	<b>-1.9%</b>	<b>-27.7%</b>	<b>29.8%</b>	<b>1.0%</b>	<b>-1.7%</b>	<b>2.8%</b>	<b>-3.5%</b>	<b>-17.3%</b>	<b>16.7%</b>	<b>-3.5%</b>	<b>5.0%</b>	<b>-9.5%</b>
	Japan	2.8%	-43.6%	34.3%	1.6%	-10.1%	-5.9%	-27.6%	-33.0%	26.1%	-18.3%	4.1%	-66.1%
	Taiwan	-11.8%	-33.8%	53.9%	-7.2%	-3.3%	-14.0%	-35.5%	-24.8%	10.9%	5.1%	-12.3%	-61.0%
	Hong Kong	-2.9%	-33.4%	24.9%	-6.0%	-6.6%	9.8%	22.0%	-22.4%	15.9%	-12.8%	8.2%	-17.0%
	Australia	-0.2%	-1.1%	16.3%	4.8%	5.9%	20.8%	-1.6%	-9.2%	-2.2%	9.0%	0.6%	47.8%
	South Korea	4.9%	-8.4%	10.5%	3.3%	11.7%	-8.1%	-5.7%	-29.6%	28.4%	-6.6%	0.0%	-14.6%
	China	8.6%	-24.2%	57.4%	-4.0%	-0.4%	6.4%	30.0%	2.2%	17.9%	20.0%	19.1%	171.4%
	New Zealand	-28.7%	48.1%	-12.8%	14.3%	10.4%	8.4%	44.5%	-14.0%	12.8%	-32.2%	45.8%	144.7%
	India	-25.9%	27.2%	46.1%	-18.4%	10.2%	140.4%	5.3%	14.7%	81.4%	-38.5%	-29.6%	281.2%
	<b>Europe</b>	<b>-12.8%</b>	<b>-1.2%</b>	<b>9.0%</b>	<b>2.5%</b>	<b>-3.3%</b>	<b>10.3%</b>	<b>-1.8%</b>	<b>-10.7%</b>	<b>7.9%</b>	<b>-6.9%</b>	<b>-10.2%</b>	<b>-6.8%</b>
	United Kingdom	-11.0%	1.5%	11.7%	3.5%	-3.2%	12.2%	-9.4%	-19.8%	-1.9%	-6.4%	-10.1%	-23.5%
	Germany	-20.6%	-3.8%	12.5%	-3.9%	-6.4%	-2.8%	10.3%	-0.7%	7.8%	-14.8%	-4.3%	-9.0%
	Netherlands	-9.7%	12.4%	12.7%	-5.0%	3.4%	7.4%	5.1%	-15.5%	17.9%	-17.5%	-12.0%	1.5%
	France	4.4%	11.4%	2.1%	-29.2%	12.0%	23.0%	16.8%	-6.8%	21.6%	14.2%	-14.5%	43.6%
	<b>Mexico</b>	<b>18.6%</b>	<b>-50.0%</b>	<b>113.8%</b>	<b>3.5%</b>	<b>3.5%</b>	<b>11.5%</b>	<b>19.9%</b>	<b>-22.4%</b>	<b>-16.1%</b>	<b>3.6%</b>	<b>3.2%</b>	<b>6.5%</b>
	<b>Other overseas</b>	<b>7.7%</b>	<b>-10.2%</b>	<b>14.2%</b>	<b>-30.5%</b>	<b>45.8%</b>	<b>-7.4%</b>	<b>-19.1%</b>	<b>15.2%</b>	<b>-7.0%</b>	<b>35.1%</b>	<b>6.0%</b>	<b>19.2%</b>
	<b>TOTAL INTERNATIONAL</b>	<b>0.7%</b>	<b>-9.4%</b>	<b>6.3%</b>	<b>-3.2%</b>	<b>-0.6%</b>	<b>-0.8%</b>	<b>-5.7%</b>	<b>-9.8%</b>	<b>4.5%</b>	<b>-2.3%</b>	<b>0.5%</b>	<b>-19.9%</b>

Source: Statistics Canada: International Travel Survey.

TABLE 17: INTERNATIONAL VISITOR EXPENDITURES BY MARKET ORIGIN

Market		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2011
Expenditures (\$ millions)	<b>United States</b>	<b>\$2,047</b>	<b>\$1,839</b>	<b>\$1,925</b>	<b>\$1,722</b>	<b>\$1,727</b>	<b>\$1,671</b>	<b>\$1,567</b>	<b>\$1,424</b>	<b>\$1,519</b>	<b>\$1,468</b>	<b>\$1,495</b>
	Washington	\$493	\$436	\$427	\$402	\$371	\$369	\$365	\$364	\$384	\$402	\$418
	California	\$409	\$327	\$364	\$289	\$329	\$323	\$290	\$246	\$261	\$270	\$284
	Oregon	\$84	\$94	\$89	\$90	\$88	\$94	\$95	\$91	\$97	\$90	\$78
	Arizona	\$67	\$38	\$39	\$60	\$49	\$47	\$38	\$36	\$39	\$34	\$43
	Florida	\$70	\$74	\$82	\$72	\$54	\$46	\$42	\$36	\$55	\$47	\$49
	Texas	\$97	\$65	\$82	\$88	\$92	\$80	\$83	\$77	\$72	\$54	\$75
	<b>Asia/Pacific</b>	<b>\$881</b>	<b>\$666</b>	<b>\$825</b>	<b>\$815</b>	<b>\$824</b>	<b>\$844</b>	<b>\$898</b>	<b>\$786</b>	<b>\$845</b>	<b>\$866</b>	<b>\$879</b>
	Japan	\$283	\$180	\$217	\$236	\$194	\$164	\$138	\$111	\$126	\$125	\$117
	Taiwan	\$89	\$58	\$87	\$75	\$75	\$71	\$49	\$44	\$42	\$48	\$36
	Hong Kong	\$81	\$46	\$74	\$68	\$53	\$58	\$70	\$59	\$64	\$64	\$70
	Australia	\$107	\$110	\$125	\$128	\$144	\$177	\$191	\$172	\$166	\$196	\$200
	South Korea	\$140	\$122	\$120	\$124	\$162	\$138	\$165	\$117	\$150	\$134	\$125
	China	\$58	\$54	\$95	\$68	\$75	\$101	\$121	\$135	\$132	\$140	\$172
	New Zealand	\$20	\$31	\$18	\$10	\$19	\$22	\$48	\$49	\$42	\$29	\$43
	India	\$2	\$1	\$3	\$2	\$3	\$11	\$16	\$18	\$37	\$23	\$11
	<b>Europe</b>	<b>\$630</b>	<b>\$617</b>	<b>\$685</b>	<b>\$744</b>	<b>\$687</b>	<b>\$808</b>	<b>\$807</b>	<b>\$698</b>	<b>\$764</b>	<b>\$731</b>	<b>\$662</b>
	United Kingdom	\$303	\$304	\$343	\$384	\$338	\$392	\$369	\$268	\$263	\$253	\$243
	Germany	\$124	\$122	\$124	\$143	\$126	\$113	\$147	\$156	\$163	\$146	\$139
	Netherlands	\$39	\$43	\$52	\$42	\$50	\$54	\$67	\$57	\$61	\$49	\$51
	France	\$19	\$25	\$22	\$22	\$26	\$37	\$26	\$30	\$44	\$54	\$39
	<b>Mexico</b>	<b>\$58</b>	<b>\$42</b>	<b>\$75</b>	<b>\$74</b>	<b>\$79</b>	<b>\$83</b>	<b>\$96</b>	<b>\$89</b>	<b>\$67</b>	<b>\$66</b>	<b>\$90</b>
	<b>Other overseas</b>	<b>\$48</b>	<b>\$49</b>	<b>\$58</b>	<b>\$43</b>	<b>\$60</b>	<b>\$59</b>	<b>\$46</b>	<b>\$53</b>	<b>\$45</b>	<b>\$63</b>	<b>\$76</b>
	<b>TOTAL INTERNATIONAL</b>	<b>\$3,664</b>	<b>\$3,213</b>	<b>\$3,568</b>	<b>\$3,399</b>	<b>\$3,376</b>	<b>\$3,466</b>	<b>\$3,414</b>	<b>\$3,049</b>	<b>\$3,240</b>	<b>\$3,194</b>	<b>\$3,201</b>

Source: Statistics Canada: International Travel Survey.

TABLE 18: INTERNATIONAL VISITOR EXPENDITURES YEAR-OVER-YEAR CHANGE BY MARKET ORIGIN

Market		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	02-12
Expenditures (% change)	<b>United States</b>	<b>6.3%</b>	<b>-10.2%</b>	<b>4.7%</b>	<b>-10.6%</b>	<b>0.3%</b>	<b>-3.2%</b>	<b>-6.3%</b>	<b>-9.1%</b>	<b>6.7%</b>	<b>-3.4%</b>	<b>1.9%</b>	<b>-27.0%</b>
	Washington	9.6%	-11.7%	-2.0%	-5.9%	-7.7%	-0.6%	-1.1%	-0.2%	5.6%	4.6%	3.9%	-15.3%
	California	-5.2%	-19.8%	11.1%	-20.5%	13.7%	-1.6%	-10.4%	-15.3%	6.5%	3.2%	5.3%	-30.5%
	Oregon	-6.0%	11.2%	-5.1%	1.6%	-3.1%	7.2%	1.7%	-5.1%	7.5%	-7.3%	-13.6%	-7.3%
	Arizona	3.9%	-42.7%	1.8%	53.5%	-18.2%	-3.7%	-18.7%	-5.8%	7.5%	-12.9%	26.6%	-35.9%
	Florida	67.0%	5.8%	10.5%	-12.6%	-25.0%	-13.9%	-9.7%	-13.0%	50.4%	-13.5%	2.6%	-30.9%
	Texas	31.0%	-33.3%	26.9%	6.7%	4.7%	-13.1%	4.3%	-8.1%	-5.9%	-25.0%	38.2%	-23.3%
	<b>Asia/Pacific</b>	<b>-6.0%</b>	<b>-24.4%</b>	<b>23.9%</b>	<b>-1.2%</b>	<b>1.1%</b>	<b>2.4%</b>	<b>6.4%</b>	<b>-12.4%</b>	<b>7.5%</b>	<b>2.5%</b>	<b>1.5%</b>	<b>-0.2%</b>
	Japan	-2.4%	-36.5%	20.8%	8.8%	-17.9%	-15.6%	-15.7%	-19.8%	14.0%	-0.6%	-7.0%	-58.7%
	Taiwan	-19.3%	-35.3%	50.3%	-13.7%	0.1%	-5.1%	-30.9%	-9.8%	-4.2%	14.5%	-25.5%	-59.5%
	Hong Kong	-8.8%	-43.4%	60.4%	-8.1%	-22.3%	10.4%	20.0%	-15.0%	8.0%	-0.2%	10.1%	-13.5%
	Australia	1.3%	3.4%	13.4%	2.1%	12.6%	23.2%	8.1%	-10.0%	-3.5%	18.3%	2.0%	88.1%
	South Korea	5.9%	-13.2%	-1.6%	3.5%	30.8%	-15.1%	19.5%	-28.8%	27.5%	-10.1%	-7.4%	-11.3%
	China	-12.8%	-6.7%	75.8%	-28.9%	10.5%	34.3%	20.3%	11.6%	-2.6%	6.2%	22.9%	195.3%
	New Zealand	-10.8%	57.4%	-41.8%	-46.3%	94.8%	17.3%	114.4%	1.6%	-14.6%	-29.1%	44.7%	114.6%
	India	-53.4%	-33.2%	135.7%	-33.0%	38.3%	249.1%	41.7%	10.0%	110.5%	-38.7%	-51.3%	400.1%
	<b>Europe</b>	<b>-10.3%</b>	<b>-2.0%</b>	<b>10.9%</b>	<b>8.7%</b>	<b>-7.7%</b>	<b>17.6%</b>	<b>-0.1%</b>	<b>-13.6%</b>	<b>9.6%</b>	<b>-4.3%</b>	<b>-9.5%</b>	<b>5.1%</b>
	United Kingdom	-4.1%	0.3%	12.8%	12.1%	-12.0%	16.1%	-6.0%	-27.3%	-1.9%	-3.8%	-3.9%	-19.8%
	Germany	-22.2%	-1.8%	1.6%	15.9%	-12.1%	-10.5%	30.5%	6.0%	4.6%	-10.3%	-5.3%	11.8%
	Netherlands	-3.0%	10.9%	21.8%	-20.3%	20.3%	6.4%	24.4%	-14.2%	7.5%	-19.6%	2.9%	30.8%
	France	-1.4%	31.1%	-12.1%	1.1%	18.3%	42.9%	-29.7%	15.6%	43.3%	24.0%	-27.7%	105.8%
	<b>Mexico</b>	<b>39.6%</b>	<b>-26.6%</b>	<b>76.4%</b>	<b>-0.8%</b>	<b>6.5%</b>	<b>5.7%</b>	<b>15.5%</b>	<b>-7.3%</b>	<b>-24.9%</b>	<b>-1.3%</b>	<b>35.2%</b>	<b>55.1%</b>
	<b>Other overseas</b>	<b>10.1%</b>	<b>1.3%</b>	<b>17.7%</b>	<b>-24.9%</b>	<b>37.4%</b>	<b>-1.1%</b>	<b>-21.9%</b>	<b>14.7%</b>	<b>-14.8%</b>	<b>40.1%</b>	<b>19.8%</b>	<b>56.0%</b>
	<b>TOTAL INTERNATIONAL</b>	<b>0.4%</b>	<b>-12.3%</b>	<b>11.0%</b>	<b>-4.7%</b>	<b>-0.7%</b>	<b>2.6%</b>	<b>-1.5%</b>	<b>-10.7%</b>	<b>6.3%</b>	<b>-1.4%</b>	<b>0.2%</b>	<b>-12.6%</b>

Source: Statistics Canada: International Travel Survey.