



The Value of Tourism in British Columbia

Trends from 2001 to 2011

Ministry of Jobs, Tourism and Skills Training
November 2012



TourismBC

MAP OF BRITISH COLUMBIA TOURISM REGIONS

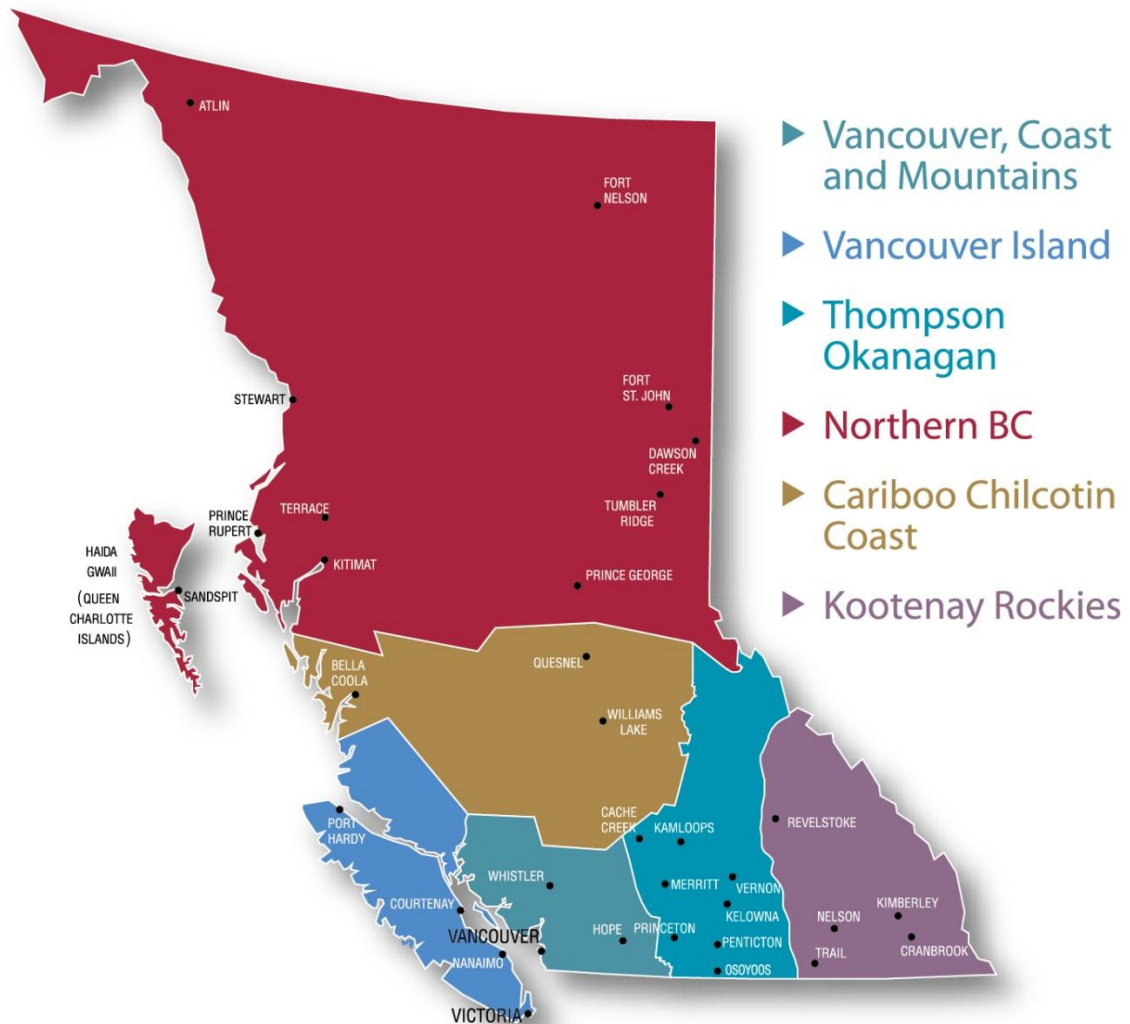


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Cover photo: Trees at Green Lake Provincial Park in the Cariboo Chilcotin Coast, available from the Tourism British Columbia
Image Bank: www.imagebank.tourismbc.net; photographer Tom Ryan

1. Overview

The tourism industry in British Columbia has demonstrated strong tourism growth since 2001, 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 2001 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 2011.

The tourism industry continues to play a significant role in the BC 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 BC include BC residents, other Canadian residents, and international visitors. Visitors may be travelling for pleasure, business/government, or educational purposes.

Key highlights:

- In 2011, the tourism industry generated \$13.4 billion in revenue, a slight 1.4% increase from 2010, and a 39% increase over 2001.
 - \$1.49 billion of accommodation room revenue was earned in communities with the Municipal Regional District Tax (MRDT)¹, a decrease of 4% from 2010.
 - The tourism industry contributed \$1.13 billion in provincial taxes, an increase of 23% from 2010, and 61% since 2001.
 - \$3.2 billion in export revenue, a 1.4% decrease from 2010 and a 12% drop since 2001.
- Tourism generated a direct contribution to British Columbia's gross domestic product (GDP) of \$6.5 billion (2002 constant dollars), an increase of 1.2% over 2010, and a 23% increase from 2001.



1.4%

*Total Tourism
Revenue*



4%

*Accommodation
Room Revenue
(MRDT
communities)*



23%

*Provincial Tax
Revenue*



-1.4%

*Export
Revenue*



+1.2%

*Tourism
GDP*

¹ Since the MRDT is collected only in certain municipalities in BC, room revenue data will only be provided for those areas that collected MRDT in 2010, 2011 and 2012 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.

- In 2011, there were 18,034 tourism-related businesses in operation in BC. This number of establishments is essentially on par with 2010 (up 0.5%) and 2001 (down 0.4%).
- The tourism industry employed 126,700 people in 2011, essentially the same as in 2010 (down 0.5%), but an increase of 15% over 2001.
- In 2011, total tourism wages and salaries were \$4.4 billion, the same as in 2010 (down 0.7%), but an increase of 30% from 2001. Average compensation in the tourism industry is approaching \$35,000.
- In 2010, there were 11.4 million overnight *domestic* visitors (i.e., from Canada) to BC.² More than 8 million (74%) were BC residents. The number of overnight visitors to BC from Canada (including BC residents) increased by 9% from 2009.
- In 2011, there were 4.4 million overnight *international* visitors (i.e., from other countries) to BC, a decrease of 1.8% from 2010. Over two-thirds (68%, nearly 3 million) of all international overnight visitors were from the United States.
- Overnight *domestic* visitor expenditures totalled \$4.6 billion in 2010, a decrease of 1.3% since 2009. Of these travellers, BC resident visitors contributed the largest portion of expenditures (\$2.5 billion, 54%), a spending increase of 1.4% from 2009.
- Overnight *international* visitor expenditures dropped 1.4% from 2010 to \$3.2 billion. While US visitors were the source of the largest share of international expenditures (46%), they spent proportionately less than visitors from overseas.

↑
+0.5%

*Tourism
Businesses*

↓
-0.5%

*Tourism
Employment*

↓
-0.7%

*Tourism Wages
& Salaries*



7%
(2010 data)

*Domestic
Visitor Volume*



-1.3%
(2010 data)

*Domestic
Expenditures*



-1.8%

*International
Visitor Volume*



-1.4%

*International
Expenditures*

² Domestic visitor estimates for 2011 will not be available until early 2013. An updated version of this report will be made available in May 2013. Therefore, 2010 numbers have been reported for overall and domestic visitor estimates in this report.

2. Contributions to the economy

There are two principal ways of measuring the tourism industry's contribution to the BC 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 BC 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 (TSA³). 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 BC provincial statistical agency (BC Stats) and Tourism British Columbia adopted a supply-side approach for estimating tourism industry revenues for BC. 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 2001 and 2011. The section also includes a discussion of accommodation room revenue, 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.

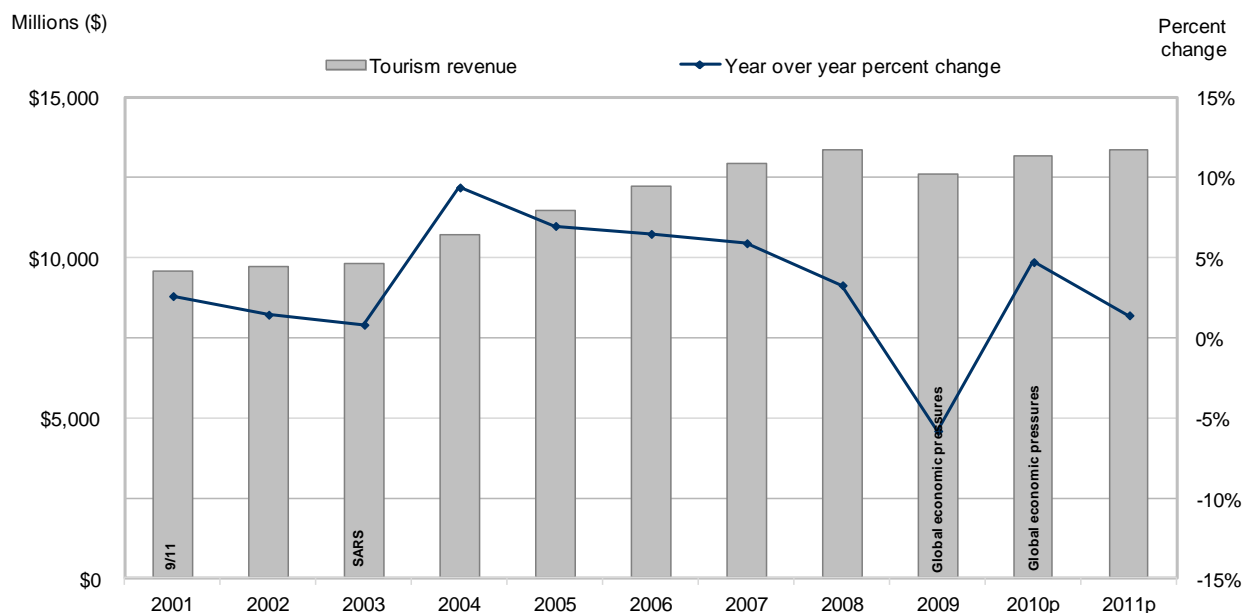
³ A tourism satellite account is a system of measuring the impact of tourism on the economy; it is a framework that accounts for the impacts across all industries which, in turn, reveals the total direct impact on the economy.

TOURISM REVENUES

Total revenue

The tourism industry generated revenues of \$13.4 billion in 2011⁴, a slight increase of 1.4% from 2010 (Figure 1). Since 2001, total tourism revenues have grown 39%. In fact, tourism revenues have grown every year between 2001 and 2011 (other than 2009), but growth varied considerably, ranging between a high of 9% and a low of about 1%. A decline of tourism revenues in 2009 was caused by several 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 2011 was at least partially attributable to the high-profile exposure from the 2010 Winter Olympics and Paralympics and implementation in China of Approved Destination Status for Canada alongside increased air capacity from China. See also Table 1, page 42.

FIGURE 1: OVERALL TOURISM REVENUE AND YEAR-OVER-YEAR CHANGE (2001 TO 2011)



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 4.0 of this report.

⁴ Source: BC Stats; 2010 and 2011 data are preliminary estimates ("2010p" and "2011p").

Tourism revenue by sector

In 2011, 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 – which include vehicle rentals, tourism-related recreation and entertainment, and vacation homes – accounted for less than 10% of total revenues.

Since 2001, accommodation and food services, and transportation have grown by 24% and 39%, respectively, while retail services and other tourism services saw even stronger growth over the 10-year period (55% and 65%, respectively).

While the share of total revenue generated by each sector⁵ has remained relatively constant from 2001 to 2011, 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. See also Table 2, page 43.

FIGURE 2: SHARE OF 2011 TOURISM REVENUE BY SECTOR

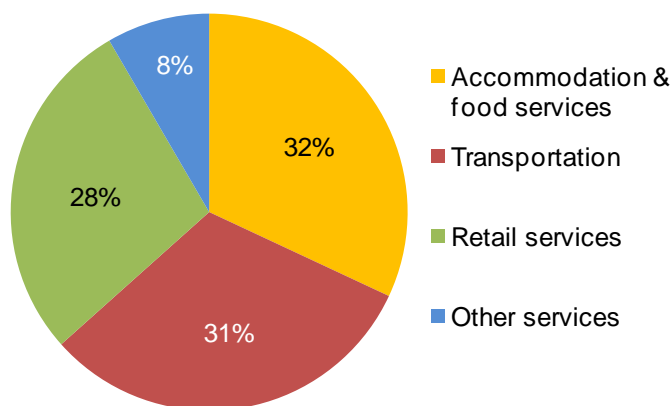
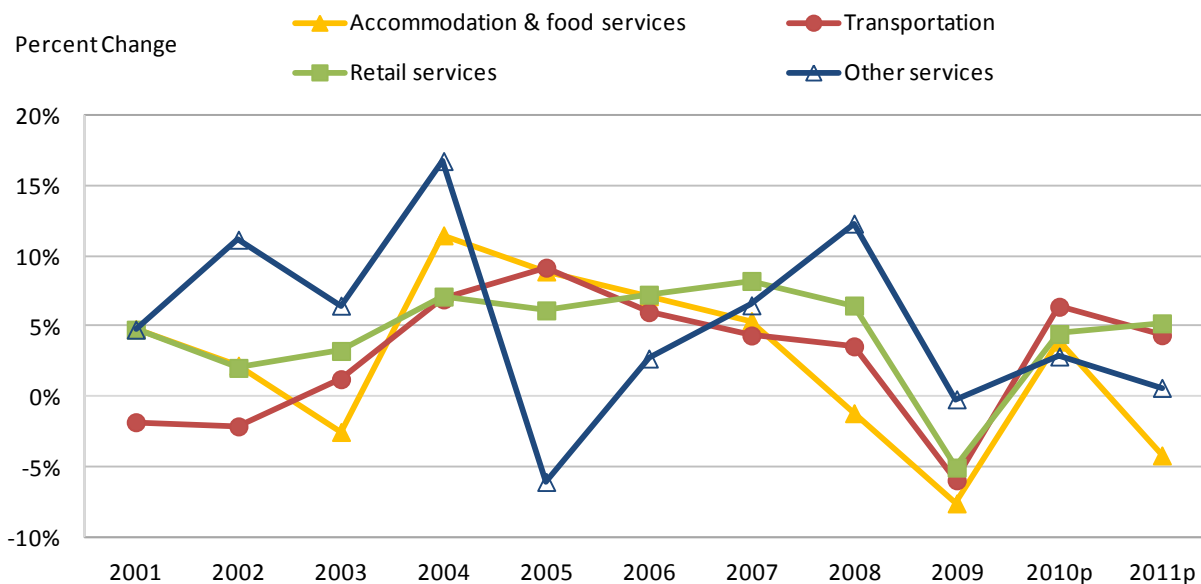


FIGURE 3: TOURISM REVENUE GROWTH RATES BY SECTOR (2001 TO 2011)



⁵ 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% growth in 2004, continued growing (but to lessening degrees) through 2007, dropped in 2009, returned to the 2006 level in 2010, but then lost this gain in 2011.

The transportation services sector lost ground in 2001 and 2002 by 2% each year, gained an average 6% annual growth from 2004 to 2008, fell by 6% in 2009, but grew 6% in 2010, and grew another 4% in 2011.

Low growth in retail services in 2002 and 2003 was followed by an average 7% growth from 2004 to 2008. The 5% drop in 2009 was nearly overcome in 2010, and growth continued in 2011.

The performance of other tourism-related services has varied greatly over the years, with a high of 17% growth in 2004 to a low of a 6% decline in 2005, followed by steadily increasing growth from 2006 through 2008, then little change in 2009, a small 2% increase in 2010, but then no change in 2011.

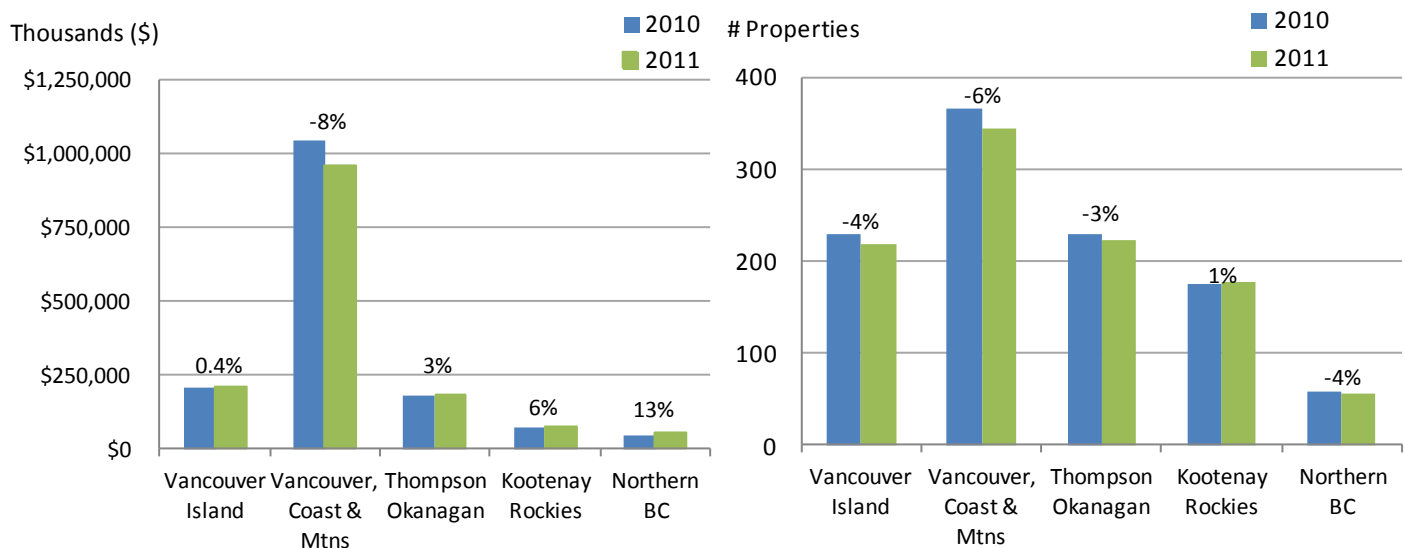
Accommodation room revenue

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.⁶

Estimated accommodation room revenue, based on MRDT collected in five of British Columbia's six tourism regions, amounted to \$1.49 billion in 2011, a decrease of 4% from 2010. There was also a 4% drop in the number of properties that collected MRDT in 2011 over 2010 (1,018 in 2011 versus 1,057 in 2010). See Table 3, page 44.

Since 2010, room revenue has increased in the Thompson Okanagan, the Kootenay Rockies, and by 13% in Northern BC, despite a drop in the number of properties collecting MRDT in both the Thompson Okanagan and Northern BC (Figure 4). Despite 4% fewer properties on Vancouver Island, this region did not see a decline in room revenue. Vancouver, Coast & Mountains was the sole region with a drop in room revenue in 2011, alongside a 6% decrease in the number of properties collecting MRDT. This was primarily due to a one-time spike in room revenue in February and March 2010 in Vancouver and Whistler, both MRDT communities, due to the impact of the 2010 Winter Olympics.

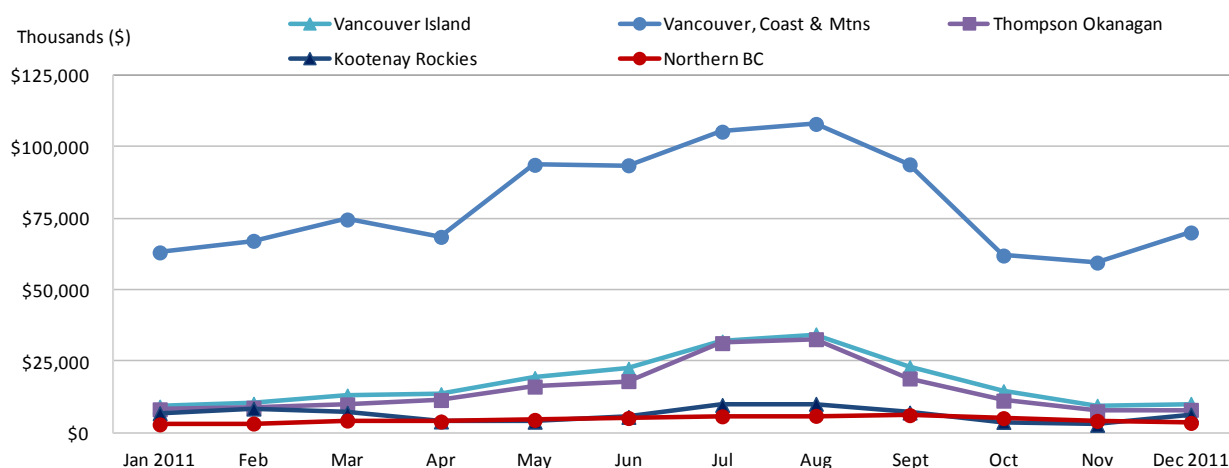
FIGURE 4: ACCOMMODATION REVENUE (MRDT) AND YEAR-TO-YEAR CHANGE BY REGION (2010 & 2011)



⁶ Historic room revenue estimates were based exclusively on the amount of Hotel Room Tax (HRT) collected by eligible accommodation establishments across BC. 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 BC, 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 known to no longer collect MRDT in 2012 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.

Vancouver, Coast & Mountains collected over \$960,000 in room revenue in 2011. Altogether, the remaining regions brought in just over half that amount, with Vancouver Island collecting over \$211,000, the Thompson Okanagan collecting over \$182,000, the Kootenay Rockies collecting over \$75,000, and Northern British Columbia collecting over \$54,000 in 2011. Comparing to the corresponding month in 2010, with the exception of October, 2011 months saw growth from April through December. Specifically, there was a 14% increase in May 2011, and an average 6% increase from June through September. The impact of the 2010 Winter Olympic Games led to declines to typical amounts of room revenue in January through March 2011 compared to 2010. See Figure 5.

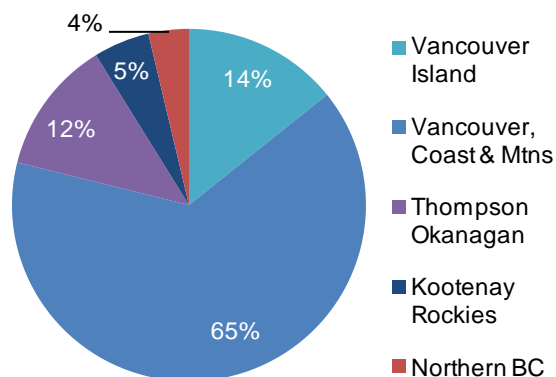
FIGURE 5: MONTH BY MONTH ACCOMMODATION ROOM REVENUE BY REGION (2011)



Accommodation room revenue by region

In 2011, the Vancouver, Coast & Mountains region generated two-thirds of BC's reportable MRDT based estimates of room revenue, followed by Vancouver Island (14%) and the Thompson Okanagan (12%; Figure 6). The regional shares of room revenue are essentially the same as in 2010. Note that the shares reflect the relative size of each region with respect to tourism and also the proportion of communities in each region that have opted to collect the MRDT. See also Table 3, page 44.

FIGURE 6: SHARE OF 2011 MRDT BY REGION



The remainder of this room revenue section focuses on select communities in each of the five regions. The communities chosen to be highlighted in this report were those with the largest annual room revenue and that had data for each month in 2011. Monthly room revenue in 2011 is compared with that of the corresponding month in 2010.

Cariboo Chilcotin Coast

Data for the communities in the Cariboo Chilcotin Coast region that collect MRDT is not provided as there were not enough properties to meet the confidentiality based threshold for reporting.

Vancouver, Coast & Mountains

The three largest areas in the Vancouver, Coast & Mountains region that collect MRDT are Richmond, Whistler and Downtown Vancouver. These three areas comprised 89% of the region's total reported MRDT in 2011. Overall MRDT revenue in the region decreased by 8% since 2010; while it decreased in each of the three communities as well, the largest drop since 2010 was in Whistler (-18%; see Figure 7), again due to the impact of hosting the 2010 Games on 2010 room revenue.

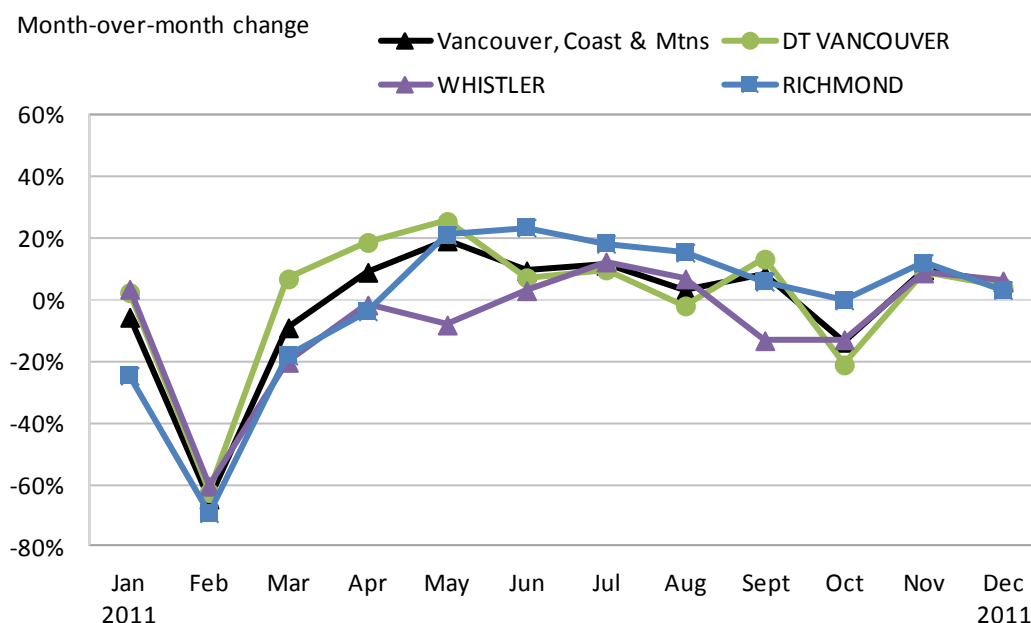
In each community, and the region overall (-65%), there were large declines in room revenue in February (2010 over 2011), due to the 2010 Olympics being hosted in Vancouver and Whistler in February 2010. There were also declines in March in Whistler, Richmond, and the region overall.

Richmond had an average 19% increase in room revenue from May through August, and an average of 5% growth from September through December. Richmond's room revenue dropped by 9% compared to 2010, for a total of \$195 million in 2011.

Downtown Vancouver, which comprised 54% of the region's total room revenue in 2011, grew by 3% over 2010, for a total of \$521 million. Downtown Vancouver earned more room revenue in each month in 2011, except for February, August and October.

Room revenue in Whistler generally saw decreases in 2011 over 2010, but averaged increases of 7% in the summer, and saw growth again in November and December. Overall room revenue in Whistler came to a total of \$142 million in 2011.

FIGURE 7: ROOM REVENUE GROWTH RATES FOR SELECT COMMUNITIES: VCM (2011)



Vancouver Island

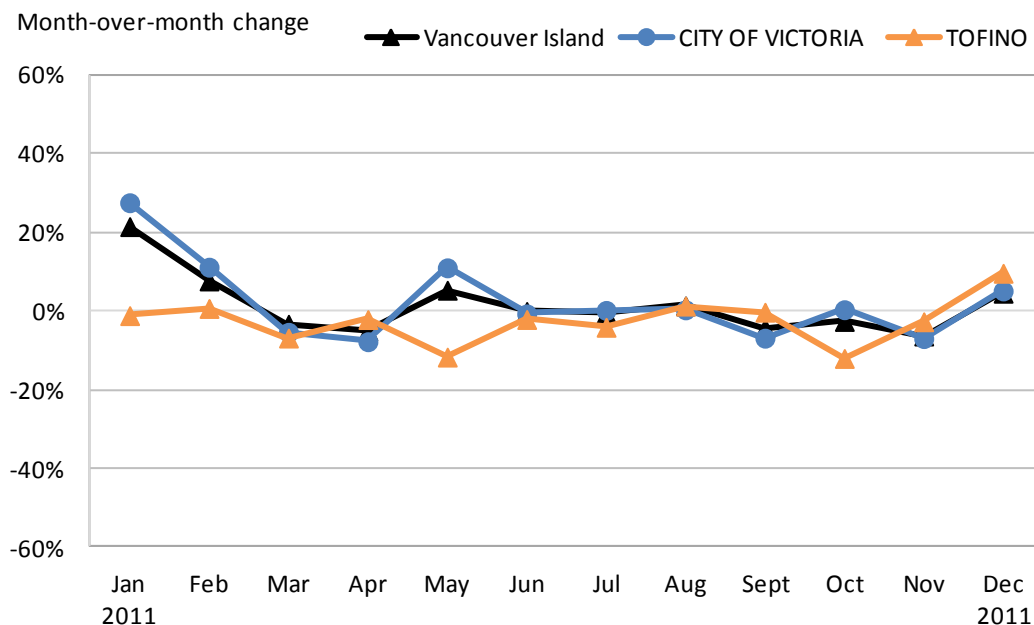
The two largest urban communities on Vancouver Island region that collect MRDT are the City of Victoria and Tofino. These two communities comprised 76% of the region's total reported MRDT in 2011. Tofino's room revenue decreased by 3% from 2010, while the City of Victoria, and Vancouver Island overall, remained stable (1% and 0.4% growth, respectively). See Figure 8.

The City of Victoria, which comprised 59% of the region's total MRDT revenue in 2011, collected \$126 million in MRDT revenue. By month-over-month comparisons, January saw the largest increase (28%), while September and November each dropped by 7%.

Tofino collected \$34 million in MRDT revenue in 2011, 16% of the region's total. Tofino saw decreases in MRDT revenue for each month over the corresponding month in 2010, with the exception of a 10% increase in December and stability in February, August and September.

Tofino and the City of Victoria experienced opposite changes in May and October: Tofino saw decreases while the City of Victoria saw increases in room revenue revenue over 2010 during those months.

FIGURE 8: ROOM REVENUE GROWTH RATES FOR SELECT COMMUNITIES: VI (2011)



Thompson Okanagan

The three largest urban communities in the Thompson Okanagan region that collect MRDT are Kamloops, Kelowna and Penticton. These three communities comprised 72% of the region's total reported MRDT revenue in 2011. While Kamloops showed a 10% increase in room revenue over 2010, both Kelowna (2%) and Penticton (2%) had slight decreases. There was 3% growth in the region overall, compared to 2010. Change in room revenue by month varied between 6% growth and 6% drops in the Thompson Okanagan region overall, other than an 8% increase in November 2011 over November 2010.

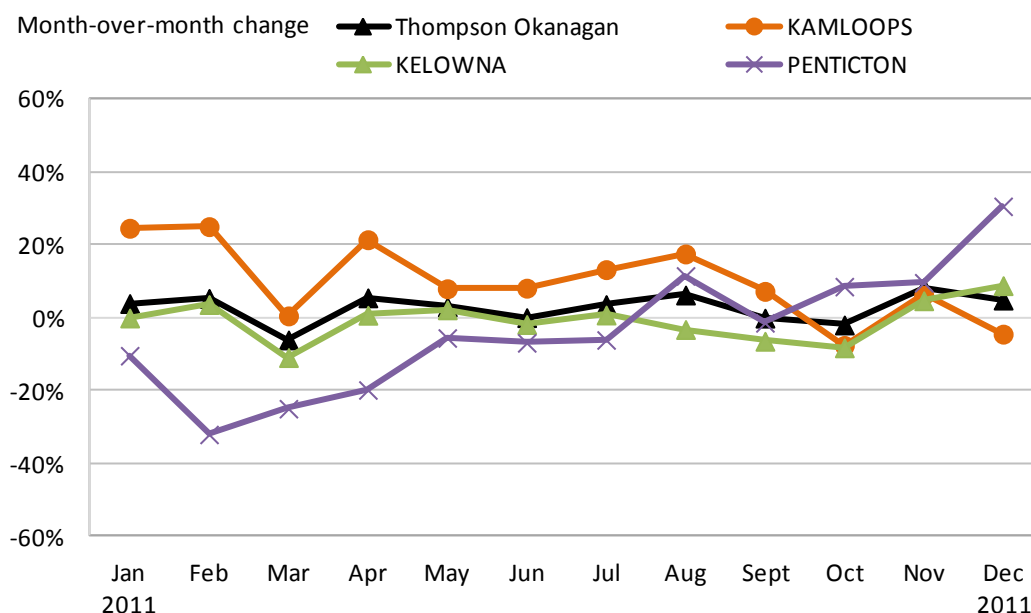
As shown in Figure 9, other than drops in October and December, Kamloops showed increases in room revenue every month in 2011 over 2010.

Kelowna experienced an 11% drop in room revenue in March and a 9% increase in December, but otherwise hovered around 0% growth every month of the year, other than an average 7% drop in September and October.

Penticton's room revenue fell during each of the first seven months of 2011, relative to the same months of 2010. However, the remainder of the year generally showed growth over the same months of 2010.

Kelowna collected 37% of the region's (MRDT communities) room revenue, for a total of \$68 million in 2011. Kamloops brought in \$43 million, 23% of the region's total in 2011. Penticton collected 12% of the region's MRDT revenue, for a total of \$22 million in room revenue in 2011.

FIGURE 9: ROOM REVENUE GROWTH RATES FOR SELECT COMMUNITIES: TOTA (2011)



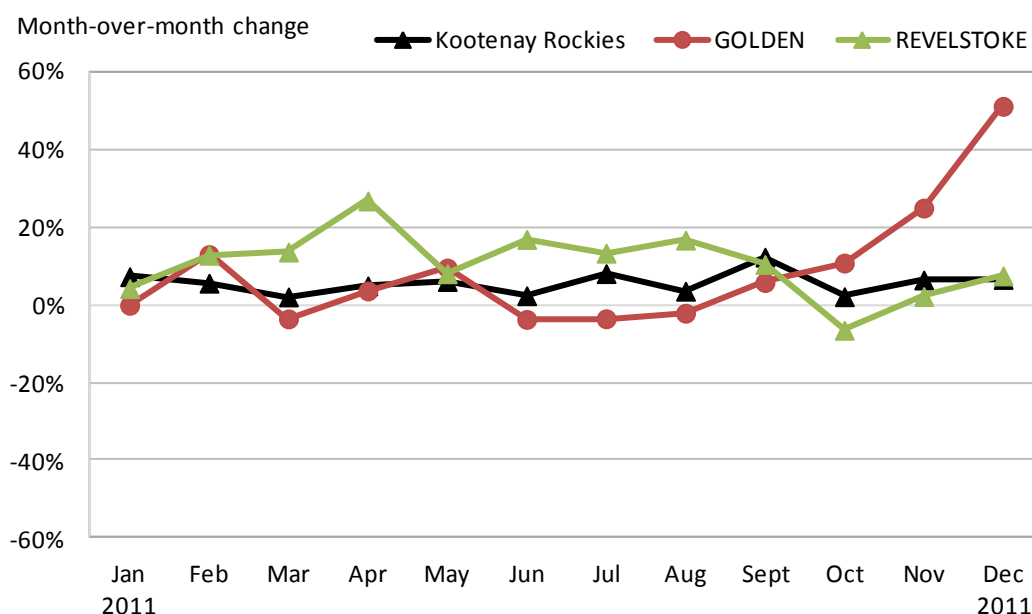
Kootenay Rockies

The two largest urban communities in the Kootenay Rockies region that collect MRDT, and had available data for each month in 2011, are Golden and Revelstoke.⁷ These two communities comprised 38% of the region's total reported MRDT in 2011. The region overall saw a 6% increase in MRDT revenue over 2010, and both communities also saw increases (4% in Golden and 11% in Revelstoke).

The Kootenay Rockies region overall saw month-over-month growth all year compared to 2010 (see Figure 10). Revelstoke saw increases in room revenue each month in 2011 over the corresponding month in 2010, other than a 7% decrease in October. While Golden saw drops in March and the summer months, there were large increases in November, and especially December, over 2010.

Golden, which comprised 16% of the Kootenay Rockies MRDT revenue, brought in a total of \$12 million in room revenue 2011. Properties in Revelstoke collected \$17 million in room revenue, 22% of the region's total (for MRDT communities).

FIGURE 10: ROOM REVENUE GROWTH RATES FOR SELECT COMMUNITIES: KR (2011)



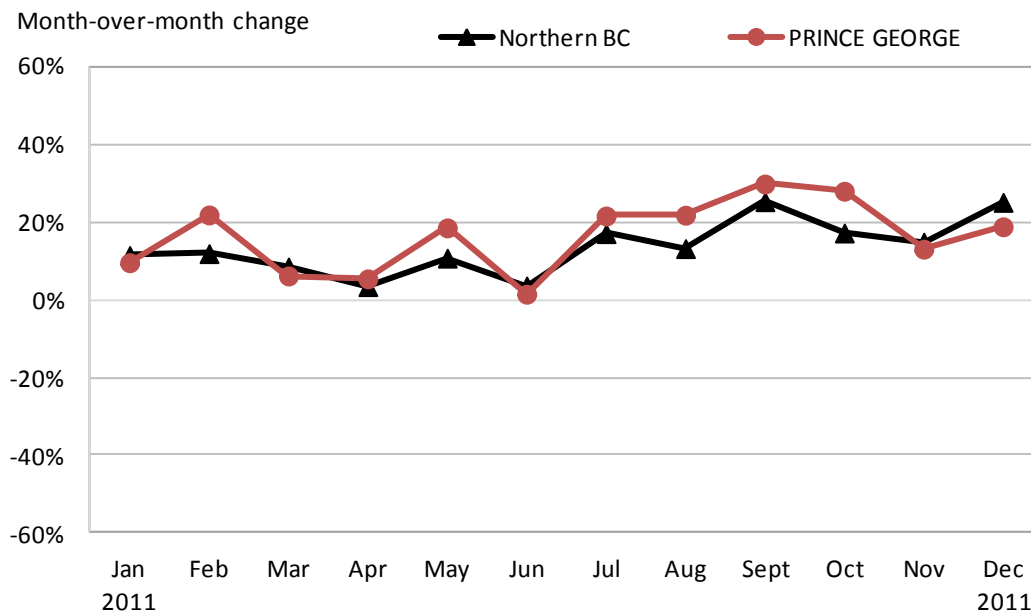
⁷ Fernie, East Kootenay Area A actually collected more MRDT revenue in 2011 than Golden, but did not have enough data to meet the threshold. Therefore, the next largest community, Golden, was included in this analysis.

Northern British Columbia

Only three urban communities in the Northern British Columbia region collect MRDT: Prince George, Prince Rupert and Smithers.⁸ However, only Prince George had month-over-month data available for all of 2011. This community comprised 54% of the region's total reported MRDT in 2011, and followed a similar pattern as the region overall in month-over-month change. See Figure 11.

Prince George properties collected \$30 million in room revenue in 2011. Prince George saw growth in each month in 2011 over the corresponding 2010 month, from 1% to a peak of a 30% increase seen in September, for an overall growth of 16% in room revenue. Northern British Columbia saw its highest increases in room revenue over 2010 in September and December (25% growth in both months).

FIGURE 11: ROOM REVENUE GROWTH RATES FOR SELECT COMMUNITIES: NBC (2011)



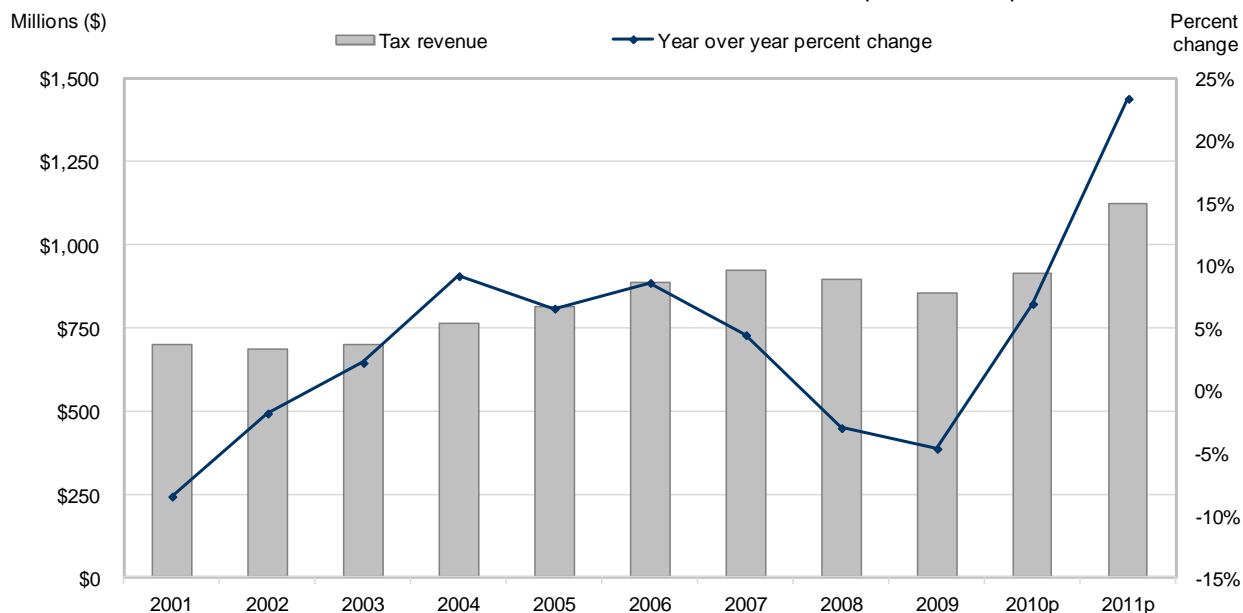
⁸ Terrace collected MRDT revenue in 2011, but stopped in June 2012. Therefore, Terrace was excluded from regional totals and individual analyses.

Tax revenue

In 2011, the tourism industry generated \$1.13 billion⁹ in revenue from provincial taxes, which include income, hotel, gas and other taxes (Figure 12).

Since 2001, tax revenue has increased 61%. In 2001, BC experienced a considerable drop in tourism tax revenue related to tax cuts instituted that year. The growth in tax revenue rebounded between 2004 and 2007 due to industry growth. Provincial tourism tax revenues decreased in 2009, but increased by 7% in 2010 as the industry recovered and the Harmonized Sales Tax (HST) was introduced. In 2011, provincial tourism tax revenue grew by 23% due in large part to the HST.¹⁰ See also Table 1, page 42.

FIGURE 12: TOURISM-RELATED TAX REVENUE AND YEAR-OVER-YEAR CHANGE (2001 TO 2011)



⁹ Source: BC Stats; 2010 and 2011 data are preliminary estimates ("2010p" and "2011p").

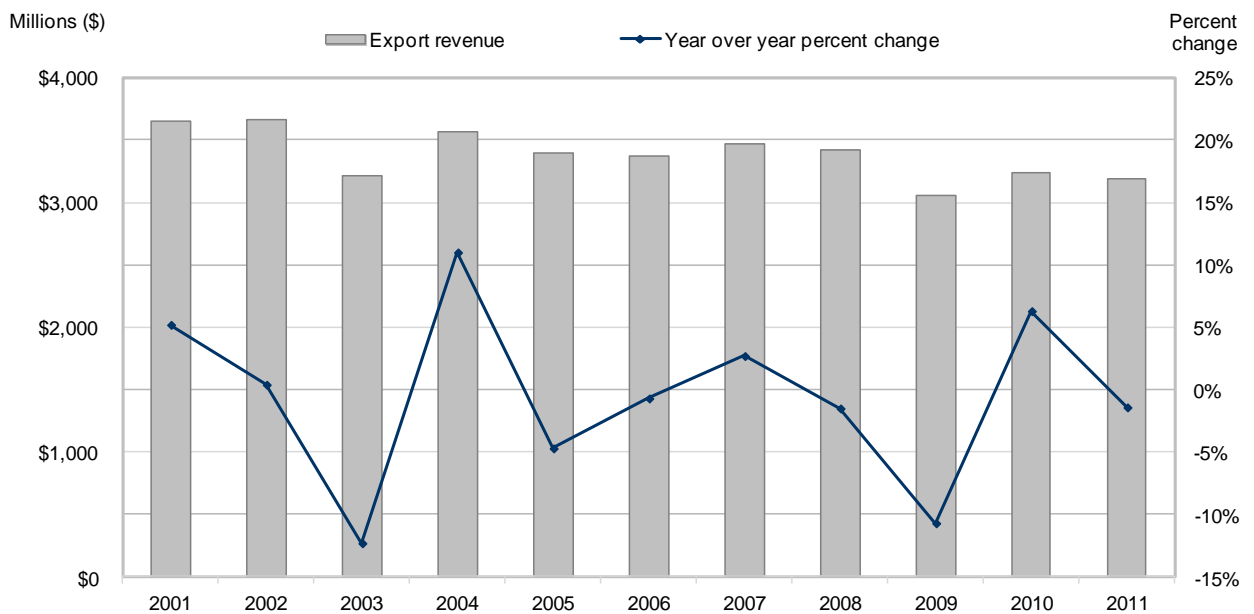
¹⁰ 2011 was the first full year of HST implementation. The HST is applicable to consumer purchases, many of which were previously exempt from the provincial sales tax.

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 2011, a slight decrease of 1.4 % from 2010 (Figure 13).

Tourism export revenue varied considerably between 2001 and 2011. In 2003, export revenue declined by 12%, due to the impact of SARS, but then rebounded 11% the following year. Export revenue dropped by 5% in 2005, and stabilized in 2006. The slight gain in 2007 was lost in 2008 and export revenue dropped dramatically in 2009 as the recession impacted international markets. In 2010, export revenue grew by 6%. Overall, tourism export revenue decreased by 12% between 2001 and 2011. See also Table 1, page 42.

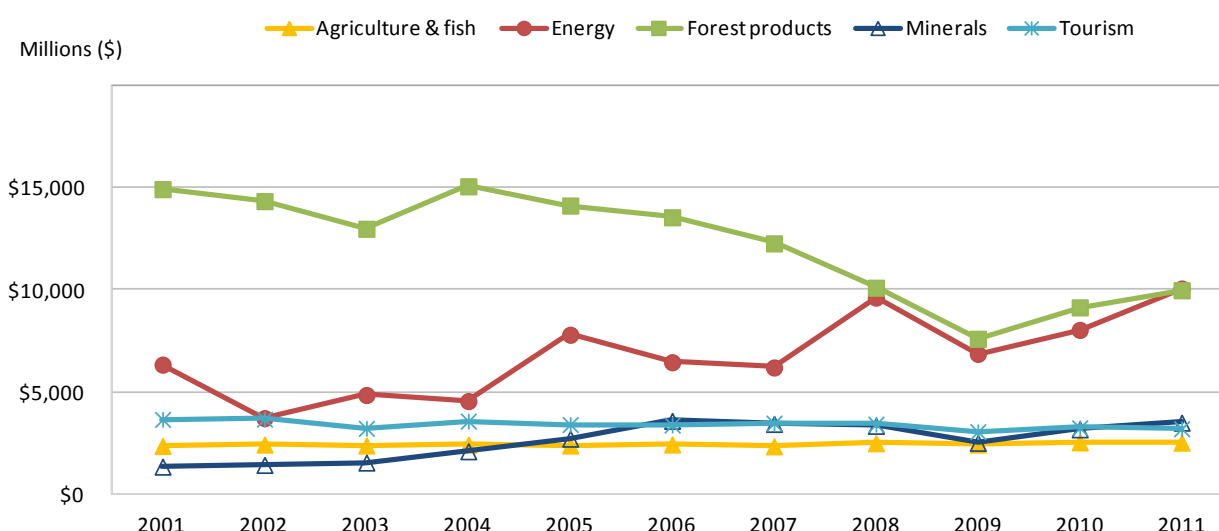
FIGURE 13: TOURISM EXPORT REVENUE (2001 TO 2011)



Between 2001 and 2011, the tourism industry's export revenue was similar to that of agriculture and fish products, and mineral products (Figure 14). While agricultural exports have remained relatively steady at an average of \$2.4 billion per year, mineral exports rose 29% since 2005 to \$3.5 billion, while tourism exports dropped by 6% since 2005. See also Table 4, page 45.

Forest product export revenues have increased since 2009 to \$10 billion, gaining some growth back from the annual declines as of 2005, but are still down 33% since 2001.¹¹ Energy exports generated the largest export revenues in 2011 (\$10.1 billion) due to a 25% increase over 2010, and a 59% increase since 2001, as energy demand increased over the last decade.

FIGURE 14: EXPORT REVENUE FROM BC'S PRIMARY RESOURCE COMMODITIES (2001 TO 2011)



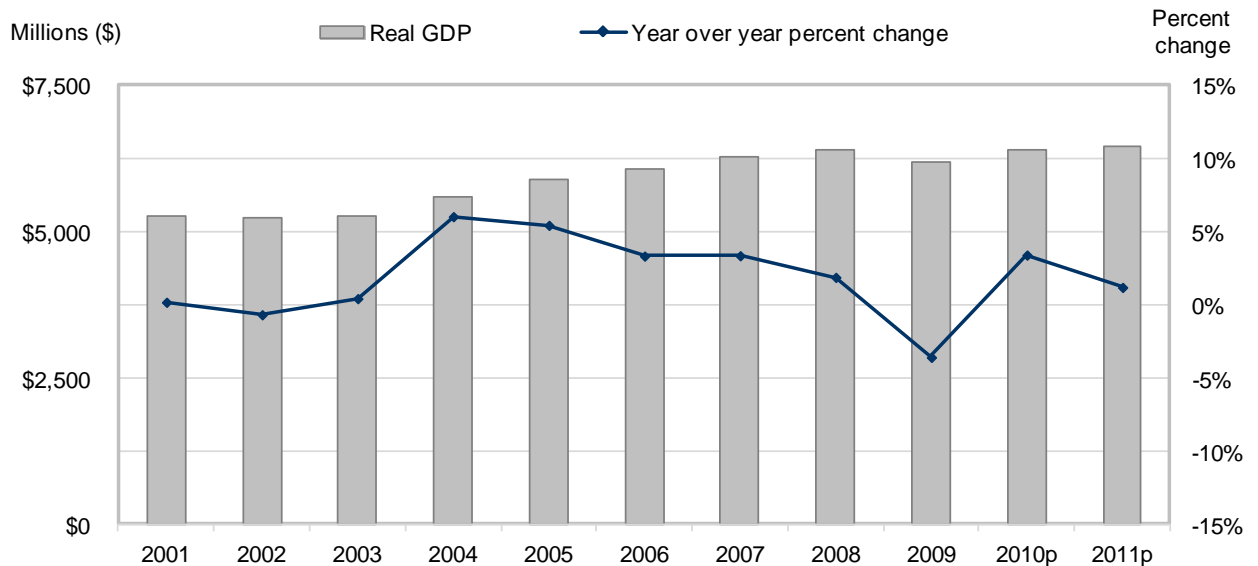
¹¹ Ministry of Forests and Range, 2009/10-2011/12 Service Plan Update: Declines were due to the weakening housing market, low timber prices, softwood lumber duties and the weakening pulp market.

GROSS DOMESTIC PRODUCT (GDP)

GDP

While the tourism industry generated \$13.4 billion in total revenue, it contributed \$6.5 billion of added value to the economy in 2011, measured using GDP (in 2002 constant dollars).¹² This was a slight increase of 1% compared with 2010, and a 23% increase from 2001 (Figure 15 and Table 1, page 42).

FIGURE 15: TOURISM GROSS DOMESTIC PRODUCT AND YEAR-OVER-YEAR CHANGE (2001 TO 2011)

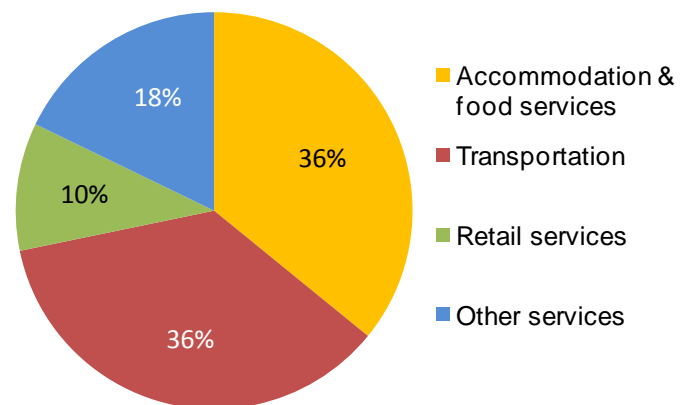


GDP by sector

In 2011, transportation and accommodation and food services accounted for nearly three-quarters of tourism GDP (based on 2002 constant dollars, Figure 16).

While retail services earned 28% of revenue, this sector only accounted for 10% of GDP. Comparatively, other services earned 8% of revenue but accounted for more than double that, in terms of share of GDP.

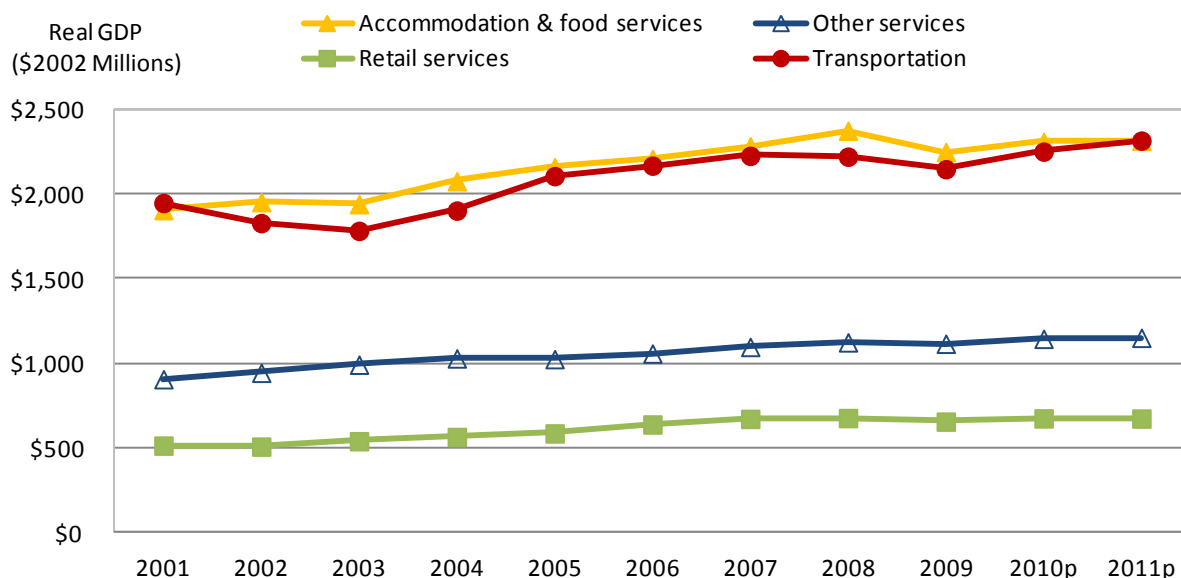
FIGURE 16: SHARE OF 2011 GDP BY SECTOR



¹² Source: BC Stats; 2010 and 2011 data are preliminary estimates ("2010p" and "2011p").

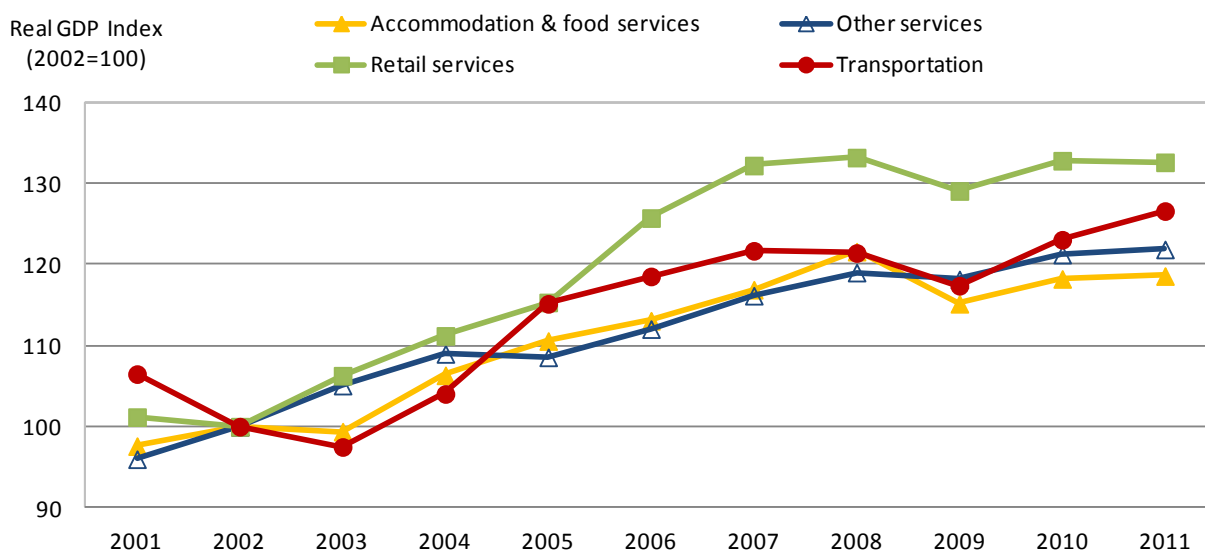
Transportation and accommodation and food services have followed similar paths in real GDP with mild fluctuations in growth, for an overall increase in real GDP since 2001 (19% and 22%, respectively). Retail services and other services have grown steadily over time, by 31% and 27% respectively, since 2001. See Figure 17, and Table 5 on page 46.

FIGURE 17: REAL GDP BY SECTOR (2001 TO 2011)



Accommodation and food services, transportation, and retail services all lost ground in 2009, but resumed growth in 2010 and 2011. Except for 2005, GDP in other tourism services showed strong growth. See Figure 18, and Table 6 on page 47.

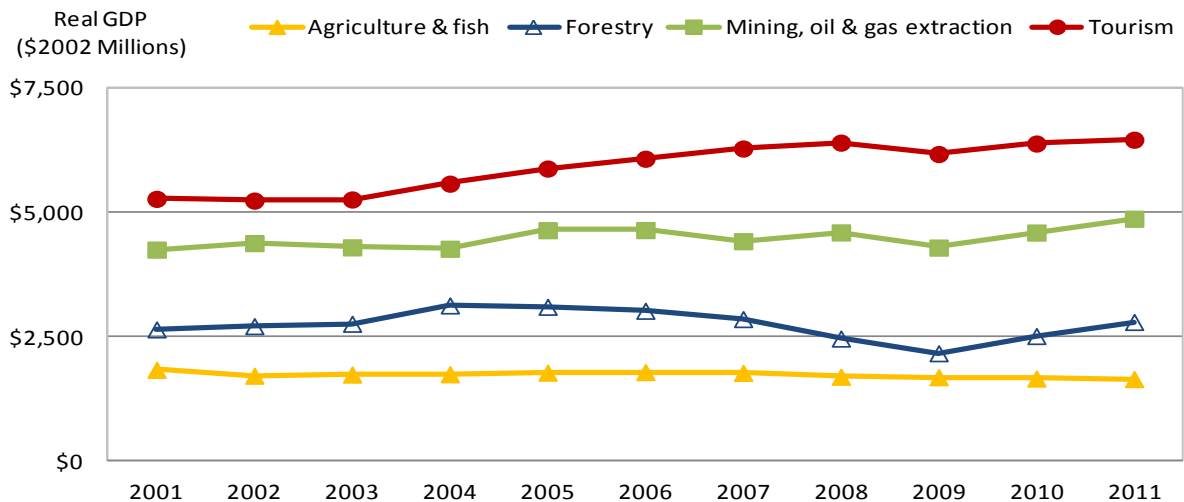
FIGURE 18: REAL GDP INDEX BY SECTOR (2001 TO 2011)



GDP by primary resource industry

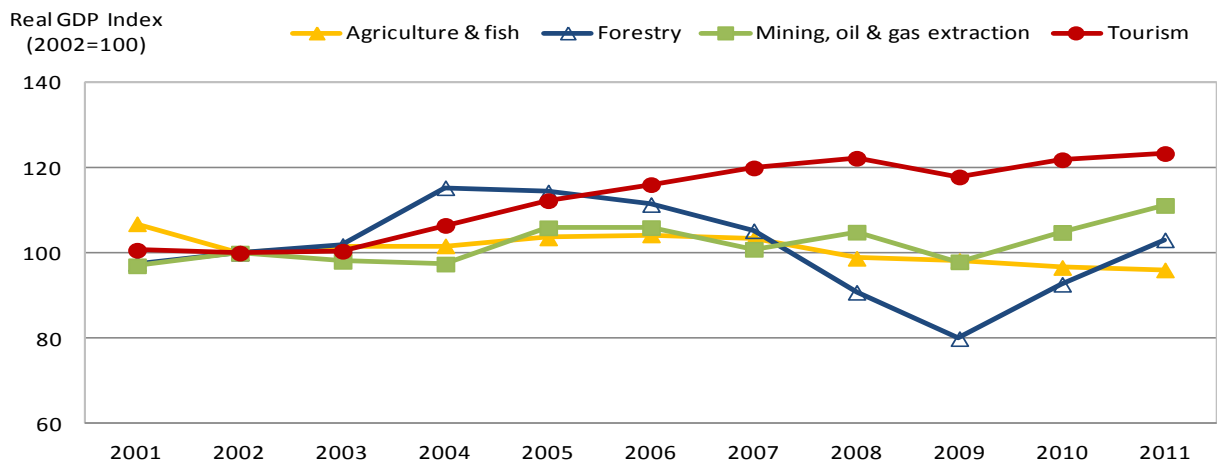
The tourism industry makes a significant contribution to the BC economy compared with other primary resource industries¹³, including forestry, agriculture & fish¹⁴, and mining and oil & gas extraction (Figure 19, and Table 7 on page 47). From 2001 to 2011, GDP of the forestry, mining and oil & gas extraction, and tourism industries have each increased (6%, 15% and 23%, respectively), while agriculture & fish has dropped by 10%.

FIGURE 19: REAL GDP BY PRIMARY RESOURCE INDUSTRY (2001 TO 2011)



Tourism is the only primary industry that has maintained steady growth in the real GDP index (2002 = 100) from 2004 to 2008, and again in 2010 and 2011. Comparatively, the real GDP index of the agriculture & fish, and the mining and oil & gas extraction industries have hovered around their respective 2002 levels, usually within 4 points. The real GDP index for the forestry industry experienced high variation, ranging from 115 down to 80.

FIGURE 20: COMPARING REAL GDP INDEX BY PRIMARY RESOURCE INDUSTRY (2001 TO 2011)



¹³ Source: <http://www.bcstats.gov.bc.ca/StatisticsBySubject/Economy/EconomicAccounts.aspx>, 1997-2011 Chained 2002\$.

¹⁴ "Agriculture & 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 BC 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 BC and provides statistics on tourism establishments. 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 establishments

In 2011, there were 18,034¹⁵ tourism-related establishments operating in BC (Figure 21). The number of tourism establishments has been fairly steady in the ten-year period from 2001 to 2011, with an overall growth of only 0.4%. See also Table 1 on page 42.

FIGURE 21: COUNT OF TOURISM BUSINESSES AND YEAR-OVER-YEAR CHANGE (2001 TO 2011)



The decrease in the number of tourism establishments in 2007 occurred primarily among very small businesses (those of one to four employees).¹⁶ In 2006, very small businesses accounted for 45% of businesses; in 2007, the number of very small businesses dropped to 6,179, a decline of 25% from the previous year.¹⁷ See Figure 22, and Table 8 on page 48.

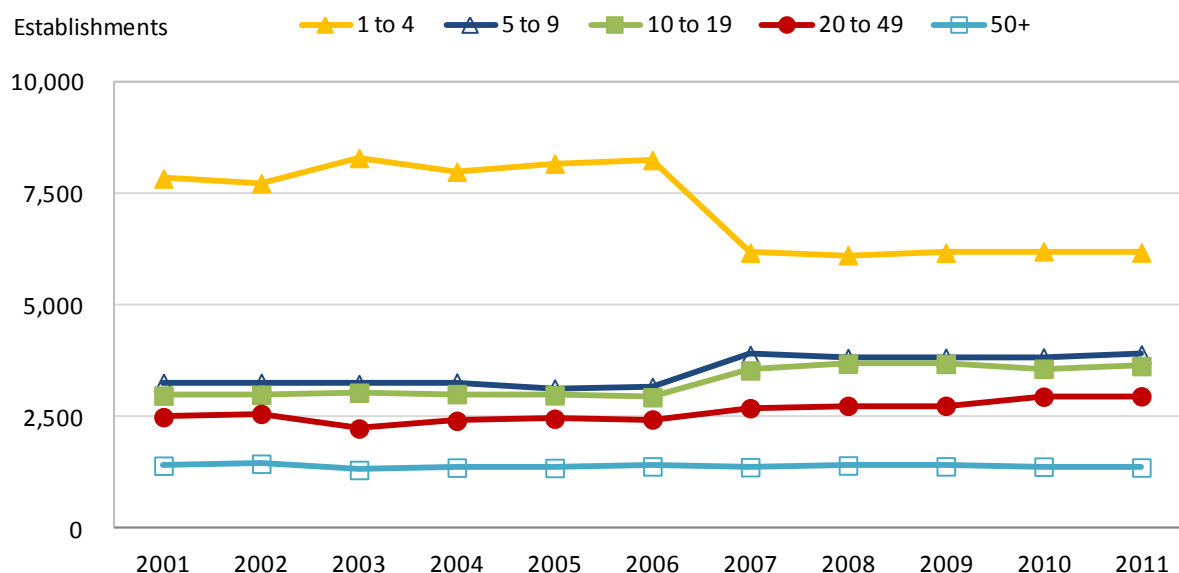
¹⁵ Source: BC Stats.

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, which results in more accuracy in reflecting the operating structure of businesses (<http://ivt.crepug.qc.ca/industries/documentation/brengl3.pdf>).

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

Comparatively, the number of tourism businesses with 5 or more employees either grew annually or remained stable after 2007. While some very small businesses were inactive or closed in 2007, others may have grown larger to meet customer demands, before the effects of the economic downturn of 2008 and 2009 were felt. From 2007 through 2011, the number of businesses, of all sizes, was stable.

FIGURE 22: COUNT OF TOURISM BUSINESSES BY SIZE (NUMBER OF EMPLOYEES) (2001 TO 2011)

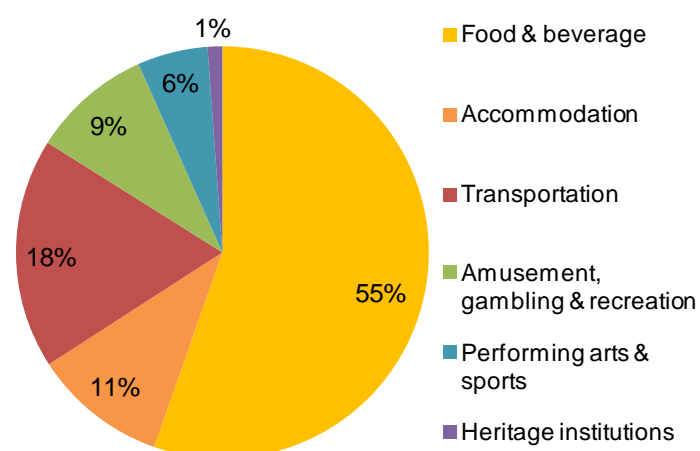


Tourism businesses by sector

Two-thirds of BC's tourism-related businesses are in the accommodation and food & beverage sectors, while transportation is the next largest sector (Figure 23).¹⁸ Within the accommodation and food services sector, 55% were food & beverage businesses, while 11% were accommodations.

The performing arts & sports and the food & beverage sectors experienced overall growth since 2001 (by 12% and 6%, respectively). In 2007, all tourism sectors experienced a net decrease in the number of tourism establishments, but the decline was less pronounced in the food & beverage sector, amusement, gambling & recreation sector, and heritage institutions (Figure 24, and Table 9 on page 49). While the performing arts & sports sector experienced the largest decline

FIGURE 23: SHARE OF 2011 TOURISM BUSINESSES BY SECTOR

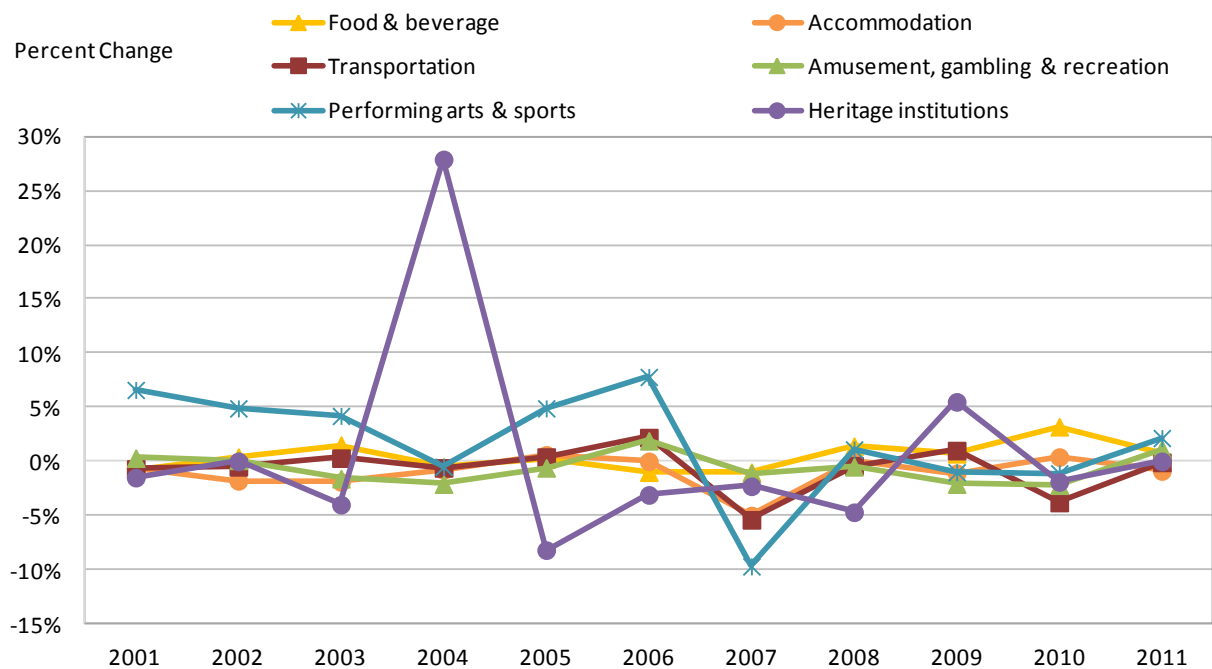


¹⁸ The data on tourism-related establishments is based on the Statistics Canada Business Register, which uses slightly different coding for sectors compared with the revenue and GDP data.

in 2007, growth in nearly all other years has kept this sector in expansion. The number of heritage institutions spiked by 28% in 2004, due to the provincial government devolving the management of 28 heritage properties, and was also the only sector that grew in 2009 (by 6%). Overall, the number of heritage institutions has grown by 5% since 2001.

The number of businesses in both the accommodation and transportation sectors have declined in the ten-year period from 2001 to 2011 (by 10% and 7%, respectively), in large part due to the decline in 2007. Other than a slight growth by 2% in 2006, the amusement, gambling & recreation sector has also been slowly but continually declining since 2002, for an overall decrease of 7%.

FIGURE 24: TOURISM BUSINESS GROWTH RATES BY SECTOR (2001 TO 2011)



Tourism businesses by region

More than half of BC's tourism-related businesses are located in the Vancouver, Coast & Mountains region (Figure 25). This region, along with the two other largest regions, Vancouver Island and the Thompson Okanagan, account for 86% of BC's tourism establishments.

Since 2003¹⁹, the number of tourism establishments has increased by 2% in the Vancouver Island region and 1% in the Vancouver, Coast & Mountains region, but has dropped by 7% in the Thompson Okanagan (Figure 26, and Table 10 on page 50). Northern BC and the Kootenay Rockies each experienced an 8% decrease in the number of tourism establishments since 2003, while the number of tourism establishments in the Cariboo Chilcotin Coast dropped by 4% since 2003.

FIGURE 25: SHARE OF 2011 TOURISM BUSINESSES BY REGION

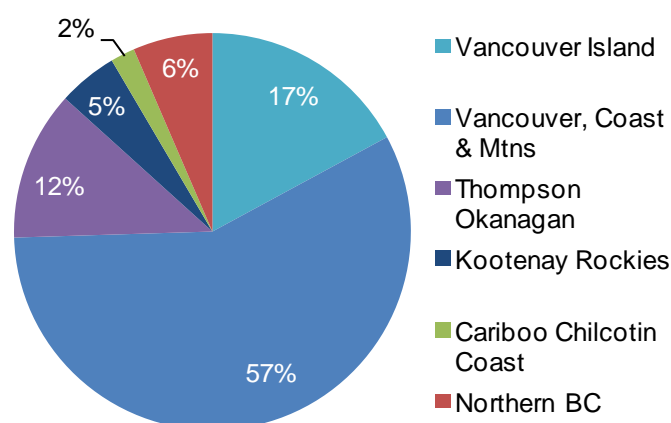
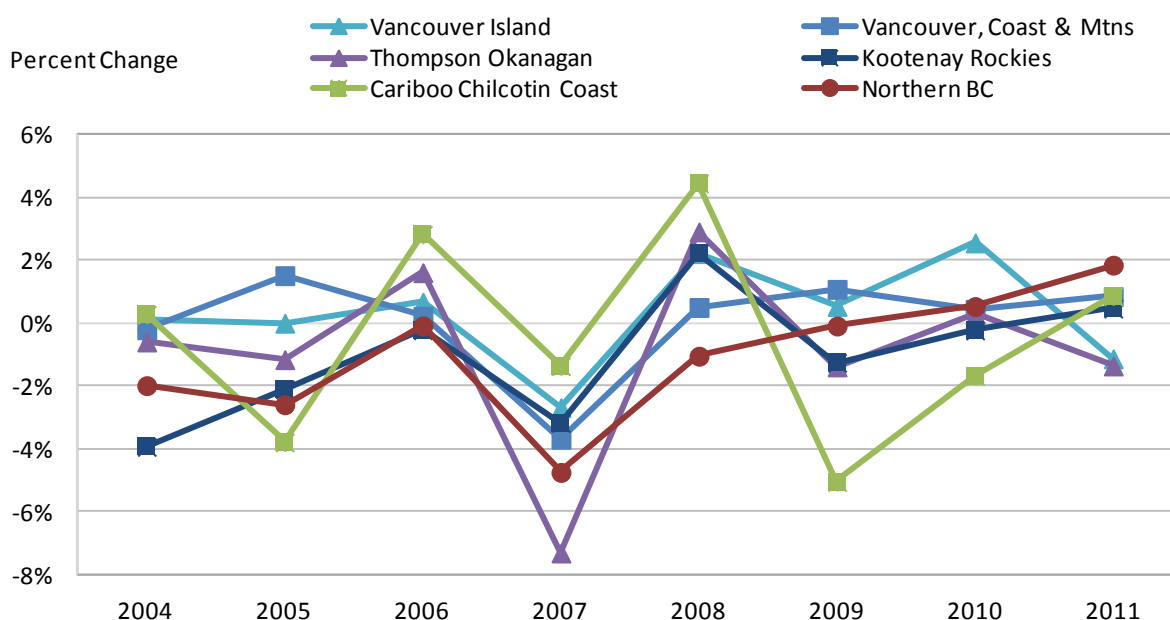


FIGURE 26: TOURISM BUSINESS GROWTH RATES BY REGION (2003 TO 2011)



¹⁹ The number of businesses without geocoding 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 of the sectors to the tourism industry.

In 2011, BC tourism industry employment was 126,700, a small 0.5% decrease from 2010 (Figure 27).²⁰ Since 2001, the number of people employed in the tourism industry has grown by 15%. Between 2001 and 2011, employment in the tourism industry peaked in 2008 at 130,600. Since then, employment has decreased by 3%, with fewer people employed in 2009, 2010, and still in 2011. See also Table 1 on page 42.

FIGURE 27: EMPLOYMENT IN THE TOURISM INDUSTRY AND YEAR-OVER-YEAR CHANGE (2001 TO 2011)



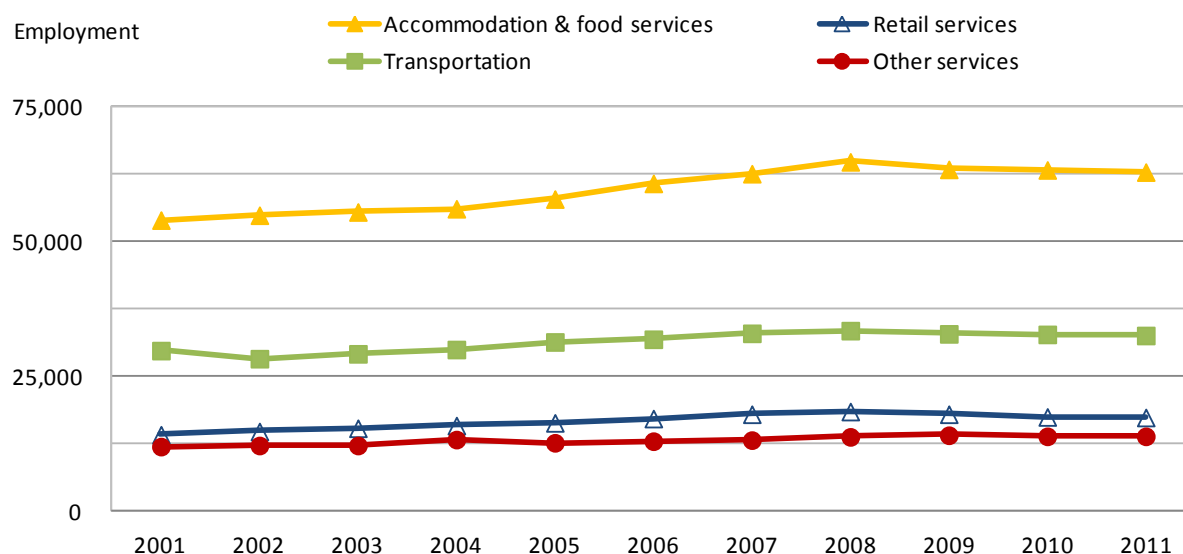
²⁰ Tourism employment estimates are developed from Statistics Canada's Survey of Employment, Payroll and Hours (SEPH), and are derived from information on payroll deductions. SEPH may under-report employment, as it does not include self-employed workers, who did not make payroll deductions. The Labour Force Survey also collects employment data, and the individual coding estimates are available; however, the coding by industry is less reliable than SEPH, so the accuracy of industry breakdowns is less precise.

Tourism employment by sector

The accommodation and food services sector accounts for half of all tourism employment in BC, while the transportation sector accounts for another quarter (Figure 28).

Since 2001, the number of employees has grown 23% in the retail services, and 16% in each of the accommodation & food services and other services sectors. Employment in the transportation sector has also grown in the ten-year period, by 9%. See also Table 11 on page 51.

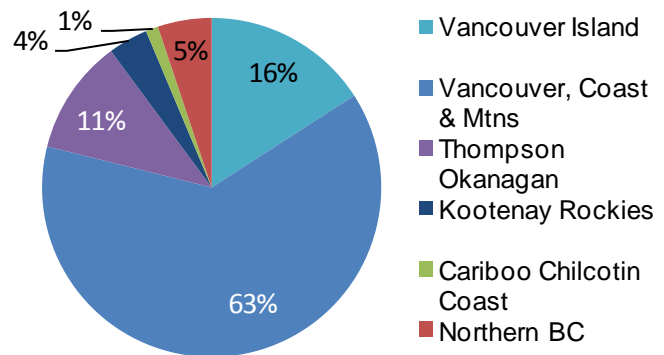
FIGURE 28: TOURISM EMPLOYMENT BY SECTOR (2001 TO 2011)



Tourism employment by region

As with the number of tourism establishments, the Vancouver, Coast & Mountains region has the largest share of BC tourism employment (63%), and is followed by Vancouver Island (16%), and the Thompson Okanagan (11%) (Figure 29). Combined, these three regions account for 90% of all tourism employment in BC.

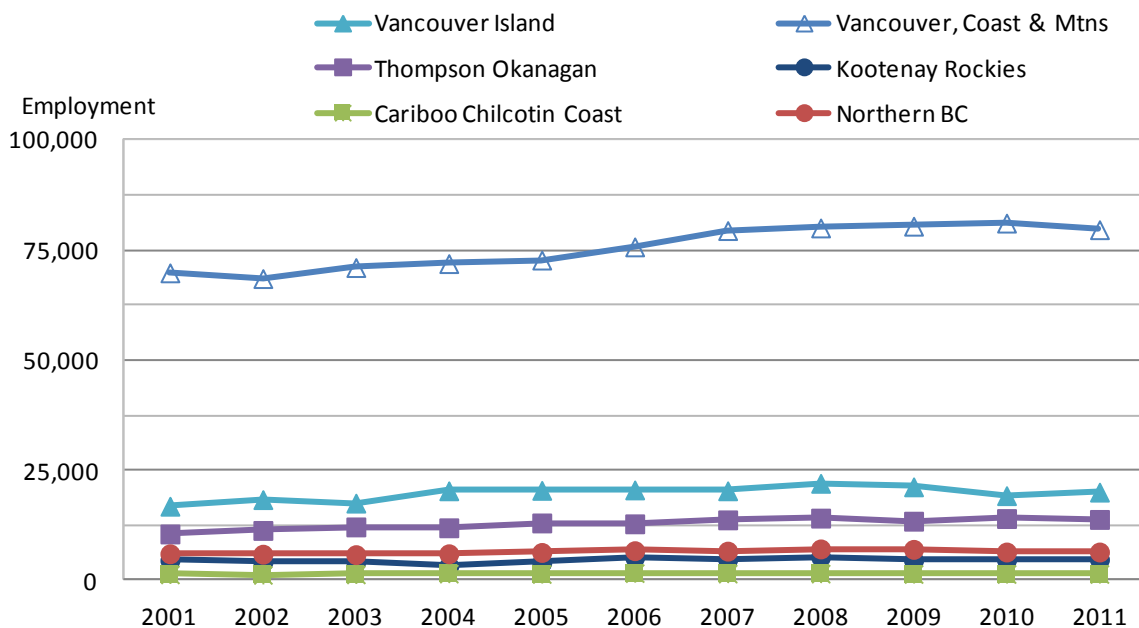
FIGURE 29: SHARE OF 2011 TOURISM EMPLOYMENT BY REGION



In 2011, tourism employment, and shares by region, remained fairly similar to the previous year. The biggest change was seen on Vancouver Island, with 4% growth over 2010. The Kootenay Rockies was the only other region to see growth in tourism employment in 2011, by 2%. There was no change at all in either the Cariboo Chilcotin Coast or Northern BC, while there was a slight decrease in tourism employment in the Thompson Okanagan (-1%) and Vancouver, Coast & Mountains (-2%).

Despite similar levels to 2010 and fluctuation in the number of employees in each region since 2001, the ten-year period shows overall growth in each region. Growth was more substantial in the Thompson Okanagan (31%), Vancouver Island (19%) and Vancouver, Coast & Mountains (14%), than in the Cariboo Chilcotin Coast (7%), Northern BC (7%), and the Kootenay Rockies (4%). See Figure 30, and Table 12 on page 52.

FIGURE 30: TOURISM EMPLOYMENT BY REGION (2001 TO 2011)



Wages and salaries

The tourism industry paid \$4.4 billion in wages and salaries in 2011.²¹ While the number of employees dropped by 0.5% from 2010, earnings decreased by 0.7% (Figure 31). This differs from 2010, where employment dropped by 0.8% but earnings increased by 1.5%.

While tourism wages and salaries posted an increase of 30% since 2001, the growth rates in compensation have not been steady. Earnings that dropped in 2002 rebounded in 2003 and continued to grow by an average 6% from 2004 through 2008. Wages and salaries dropped during the 2009 economic downturn, picked up again in 2010, but have dropped slightly this year. See also Table 1 on page 42.

FIGURE 31: WAGES & SALARIES PAID IN THE INDUSTRY AND YEAR-OVER-YEAR CHANGE (2001 TO 2011)

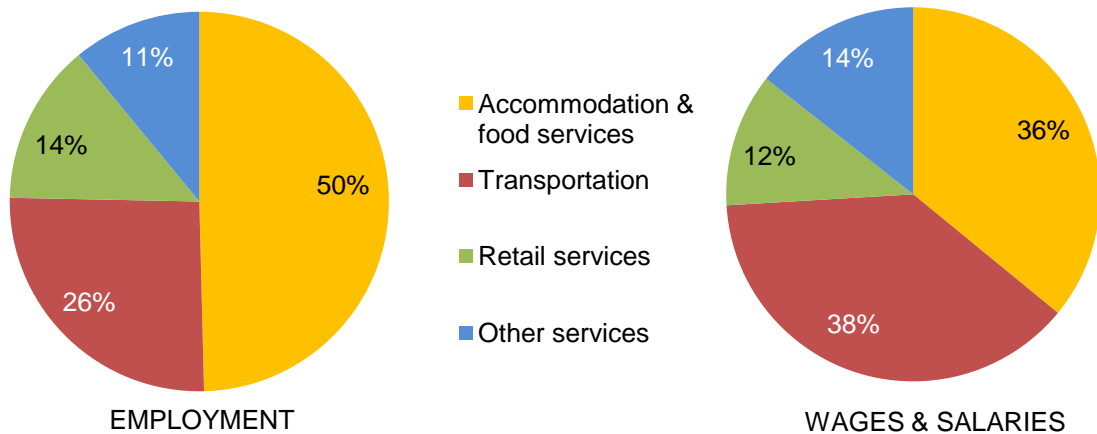


²¹ Source: BC Stats.

Tourism salaries by sector

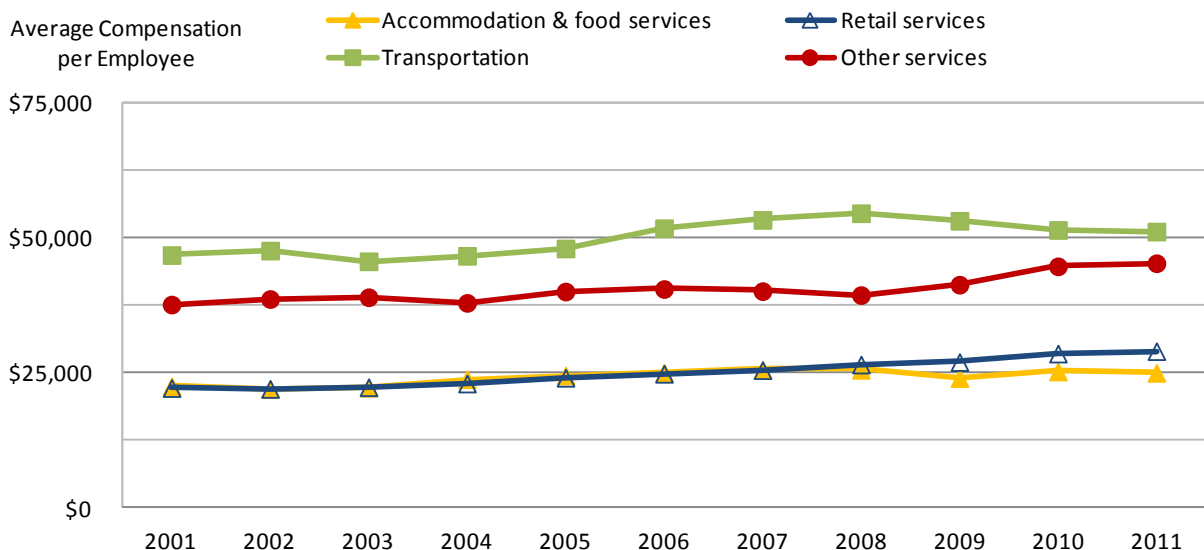
As mentioned earlier, the accommodation and food services sector comprises half of all tourism businesses; however, this sector only earns 36% of tourism wages and salaries. In contrast, the transportation sector accounts for 26% of tourism establishments but takes 38% of tourism earnings. See Figure 32, and Table 13 on page 53.

FIGURE 32: SHARE OF 2011 TOURISM EMPLOYMENT AND SALARIES BY SECTOR



While the average compensation per employee in all tourism sectors has increased since 2001, the average compensation within transportation has been more than double the figure for accommodation and food (Figure 33). Transportation average compensation was more than double that of retail services through 2008, but with steady increase since 2003 and transportation wage declines since 2009, the average compensation in retail services is now more than half that of transportation. Since 2001, growth in average earnings is highest in retail services (31% increase in the ten-year period), followed by other services (20%), accommodation and food services (11%), and transportation (9%).

FIGURE 33: AVERAGE COMPENSATION PER EMPLOYEE BY SECTOR (2001 TO 2011)



4. Market origin

Market origin data is captured through visitor surveys. Tourism British Columbia relies on two surveys²² 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/revenue²³ 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 BC are not included in the analysis of Statistics Canada surveys (only overnight travellers to BC are included).
- 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 BC 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 caution.

This section summarizes visitor volume of overnight travellers to BC (i.e., one or more nights were spent in BC) by international, domestic and all travellers to BC. This section also reports tourism expenditures by origin from the visitor surveys to provide a more complete picture of BC's tourism markets. *Domestic data for 2011 will not be available until early 2013. An updated version of this report will be made available in May 2013. Therefore, 2010 numbers have been reported for overall and domestic data in this report.*

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

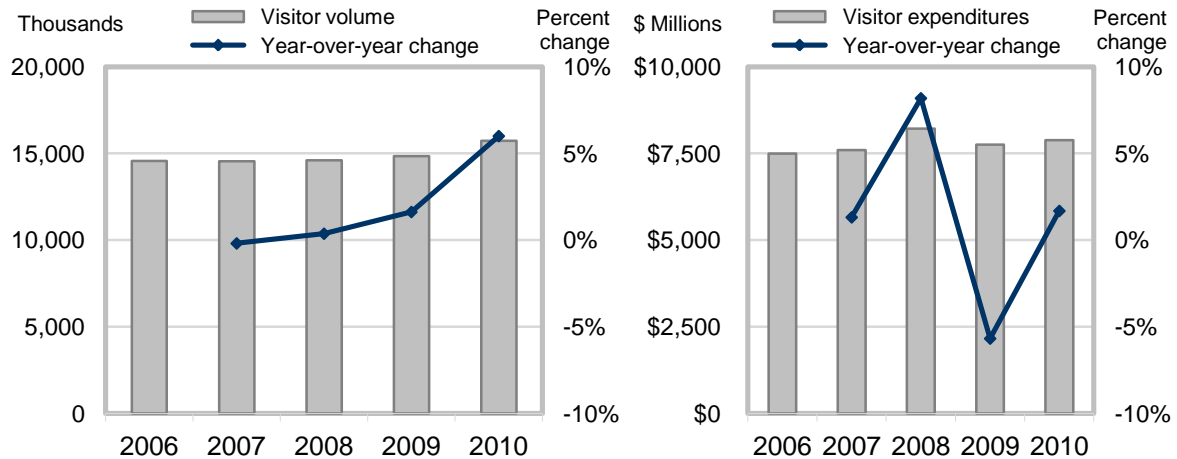
²² Please visit Statistics Canada's website for more information on the ITS Frontier counts, the ITS mail-back questionnaire and air exit surveys, as well as the TSRC questionnaire.

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

Overall visitor volume & expenditures

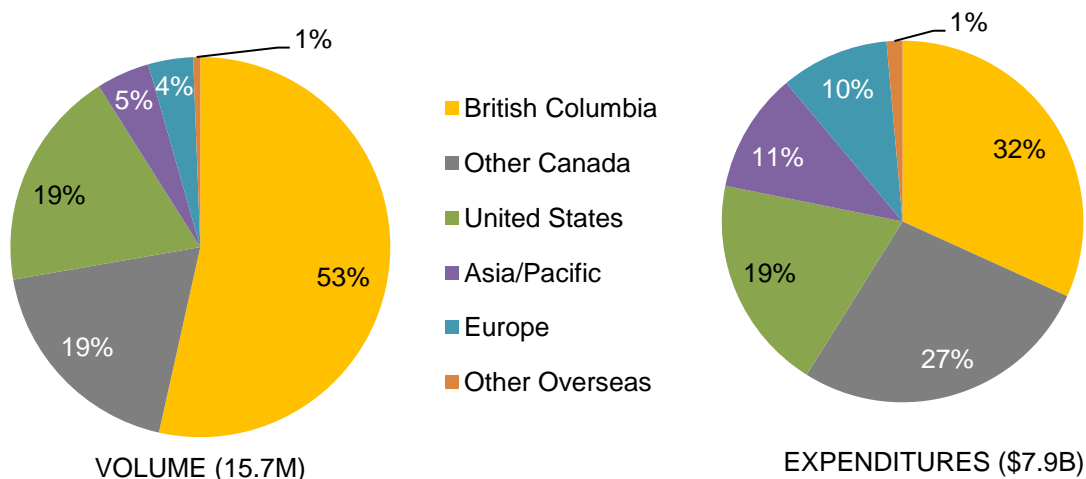
In 2010, there were 15.7 million overnight visitors in BC, an increase of 6% over 2009, who spent \$7.9 billion, an increase of 2% from 2009 (Figure 34).²⁴ Visitor volume fell slightly in 2007, but has been otherwise increasing between 2006 and 2010 (8% overall), with a spike in 2010, most likely due to the 2010 Winter Olympic and Paralympic Games. Visitor expenditures rose slightly in 2007 and up by 8% 2008, fell by 6% in 2009, and increased slightly in 2010, for an overall 5% increase from 2006 to 2010.

FIGURE 34: OVERALL VISITOR VOLUME & EXPENDITURES AND YEAR-OVER-YEAR CHANGE (2006 TO 2010)



Over half of the visitors (53%) were BC residents (Figure 35). Visitors from other parts of Canada accounted for 19% of all visits, while international visitors accounted for the remaining 28% of visitor volume. However, international visitors accounted for 41% of visitor expenditures, while Canadian and BC residents accounted for about 30% each.

FIGURE 35: OVERALL VISITOR VOLUME & EXPENDITURES BY MARKET ORIGIN (2010)



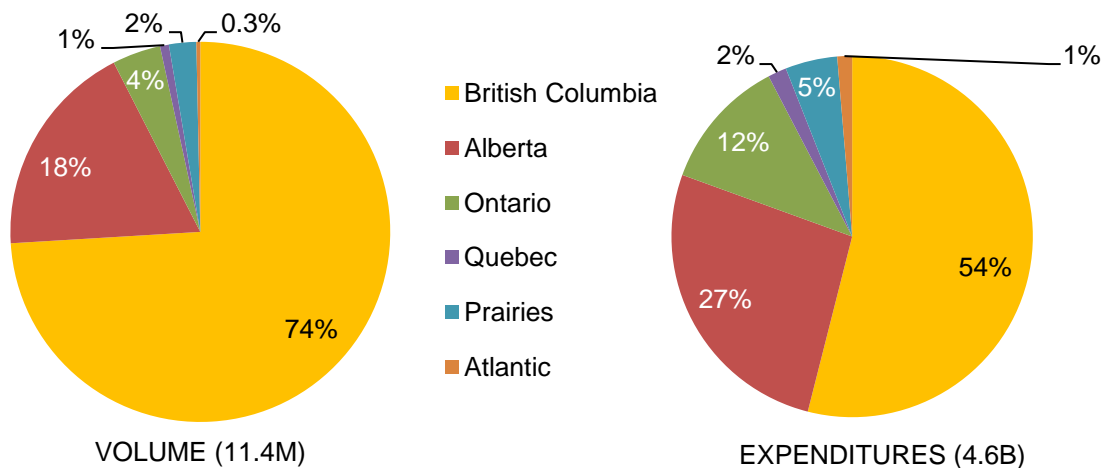
²⁴ Source of domestic data: Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC). Migration from the Canadian Travel Survey (pre 2005) to the Travel Survey of Residents of Canada, which started in 2005, does not allow comparisons before 2006.
Source of international data: Statistics Canada, International Travel Survey.

Domestic markets: visitor volume & expenditures

Domestic data for 2011 will not be available until early 2013. An updated version of this report will be made available in May 2013. Therefore, 2010 numbers have been reported for domestic, and thus overall, market origin data in this report.

Overnight visitors from Canada accounted for over 11 million travellers in 2010, a 7% increase from 2009, and an 18% increase since 2006. Of travellers from Canada, BC residents made up the largest share of visitor volume (74%) and expenditures (54%) in 2010 (Figure 36). Alberta was the second largest domestic market of overnight visitors to BC, representing one-fifth of the Canadian visitor volume (19%) and 26% of expenditures. Overall, visitors from Canada spent about 1% less in 2010 than in 2009, but 13% more than in 2006.

FIGURE 36: SHARE OF 2010 DOMESTIC VISITOR VOLUME & EXPENDITURES BY MARKET ORIGIN



BC resident visitor volume has been steadily increasing since 2008, by an average 7% over three years (Figure 37).²⁵ There has been corresponding growth since 2007, with a spike in 2008, for an average of 6% growth in spending by BC residents (Figure 38). See also tables on page 54.

Visitor volume from Alberta spiked in 2007 (increase of 25% over 2006), held at 6% growth in 2008 and 2009, but then dropped 2% in 2010. Expenditures by Albertans grew immensely in 2007 and 2008, but then dropped by 4% in 2009, and 3% again in 2010.

Quebec has a small share of both domestic market visitor volume and expenditures. Visitor volume from Quebec has varied widely between 2006 and 2009, but settled in 2010. Visitors from Quebec spent more per visitor than those from other (non-Atlantic) provinces; therefore, changes in Quebec visitor volume led to large corresponding changes in expenditures by Quebec visitors.

Visitor volume from the remainder of the country dropped in 2007 and 2008, grew in 2009 (excluding Ontario market), and in 2010 (excluding the Atlantic market). Other than a period of growth in expenditures in 2008, Ontario visitor expenditures have dropped each

²⁵ Domestic market visitor volume and expenditures data was not available in 2005 due to the data source change; therefore, percent change cannot be calculated for 2006.

year. Comparatively, expenditures have grown every year (other than 2009) by visitors from the prairies. Expenditures from Atlantic visitors increased by 30% in 2007, dropped in 2008, grew again in 2009, and dropped slightly in 2010.

FIGURE 37: DOMESTIC VISITOR VOLUME GROWTH RATES BY MARKET ORIGIN (2007 TO 2010)

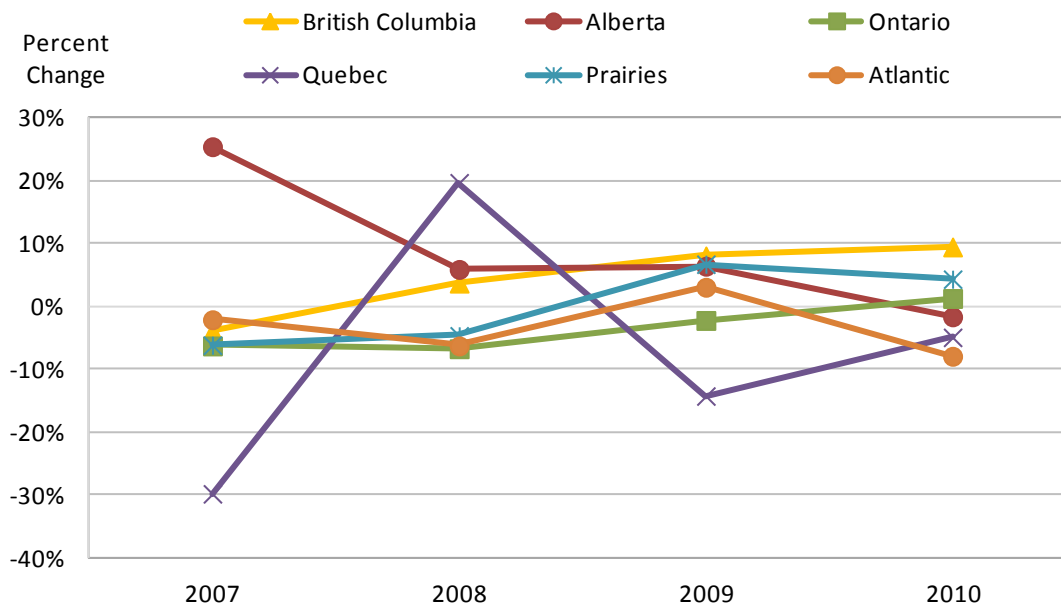
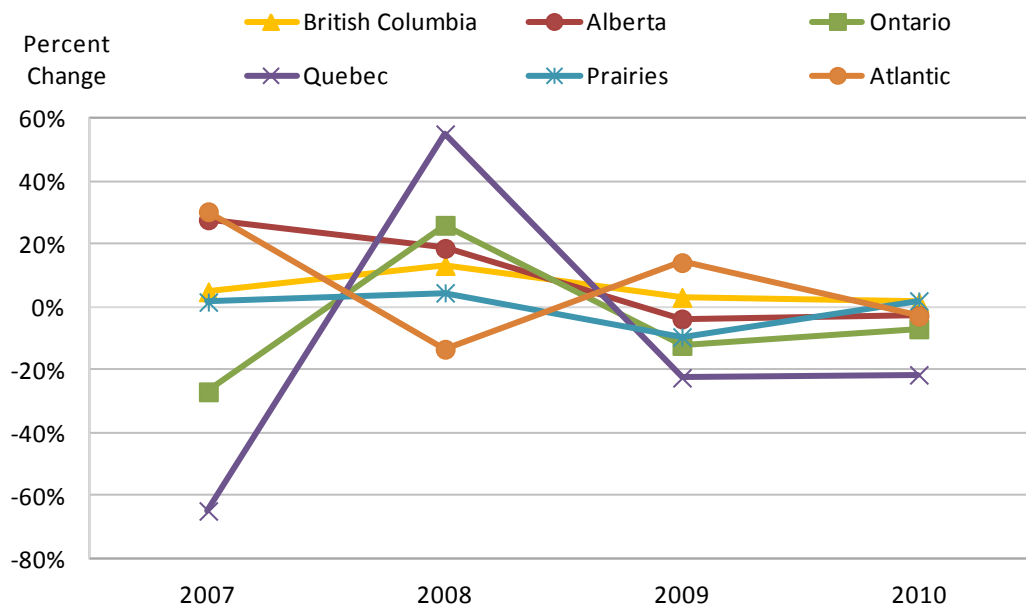


FIGURE 38: DOMESTIC VISITOR EXPENDITURE GROWTH RATES BY MARKET ORIGIN (2007 TO 2010)

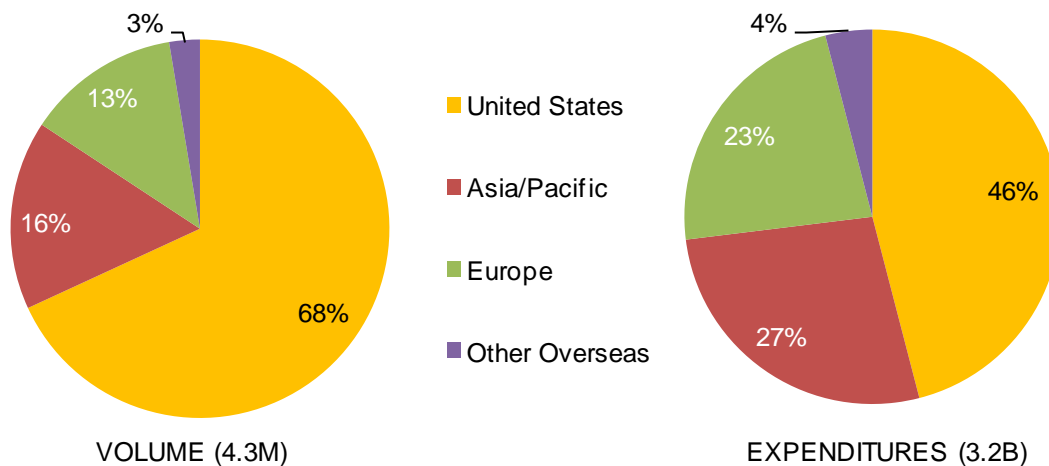


International markets: visitor volume & expenditures

In 2011, over 4 million international overnight visitors came to BC. The number of international visitors decreased by 2.3% from 2010, and has decreased by 14% from 2006, and by 20% since 2001.²⁶ With expenditures at \$3.2 billion, international visitors spent 1.4% less in 2011 than in 2010, and less than in either 2006 (-5%) or 2001 (-12%).

The United States is the largest overnight international market for BC, comprising over two-thirds of international visitor volume and nearly half of expenditures in 2011 (Figure 39). Asia/Pacific and Europe comprise 29% of the international market and a full half of expenditures, while other overseas markets account for the remaining small portion.

FIGURE 39: SHARE OF 2011 INTERNATIONAL VISITOR VOLUME & EXPENDITURES BY MARKET ORIGIN



The number of US visitors decreased 2% compared with 2010, and has decreased each year since 2003 other than slight increases in 2004 and 2010 (17% decrease in volume since 2006, and by 23% since 2001). Similarly, US visitor expenditures in 2011 decreased 3% from 2010, 15% since 2006, and 24% since 2001 (Figure 40 and Figure 41). Within the US, Washington and California are the largest markets, representing 54% of US visitor volume and 46% of expenditures in 2011. See also tables on pages 54 through 58.

In 2011, the number of visitors from the Asia/Pacific decreased 3%. Both volume and expenditures are lower in 2011 than they were in 2001 (-15% and -8%, respectively). However, while there was a decrease in visitor volume from Asia/Pacific (-8%) between 2006 and 2011, expenditures from Asia/Pacific visitors increased by 5%. While many Asia/Pacific markets saw declines in 2011, several markets have experienced growth in visitation over 2010, such as Australia, New Zealand, and especially China and India.

Visitor volume from Europe dropped by 7% in 2011, by 3% over 2006, and 10% over 2001. While visitors from Europe spent 4% less in 2011 than in 2010, these expenditures are an increase over 2006 (by 6%), and over 2001 (by 4%). 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 39% of the

²⁶ 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 2010) and back ten years (to 2001) to complement the majority of this report, as well as to 2006 to complement the domestic data time trends.

European visitor volume and 35% of visitor revenues in 2011. However, UK visitor volume and expenditures have both decreased by 20% to 25% since 2001 and 2006. Comparatively, both visitor volume and expenditures have increased in 2011 over 2006 and 2001 in both of the Netherlands and France markets. While German visitor volume has dropped from both 2006 and 2001 levels, German visitor expenditures are 16% higher than they were in 2006.

While other overseas markets comprise a small share of visitor volume (111,000) and expenditures (\$1.3 million), Mexico comprises half of those shares (50% and 51%, respectively). Visitor volume from the Mexico market has been steadily growing from 2004 through 2008 to 82,000 visitors. Volume dropped in 2009 and 2010, and stabilized in 2011 at 55,000. Mexico visitor volume has grown over 2001 by 22%, but has decreased by 10% from 2006. Mexico visitor expenditures follow the same path as that of volume, with annual growth from 2004 through 2008 to \$96 million. This growth was followed by a 7% decline in 2009, a 25% decline in 2010, but stabilization in 2011. Since 2001, expenditures from the Mexico market have increased substantially (by 60%), but have dropped by 16% since 2006.

FIGURE 40: INTERNATIONAL VISITOR VOLUME GROWTH RATES BY MARKET ORIGIN (2001 TO 2011)

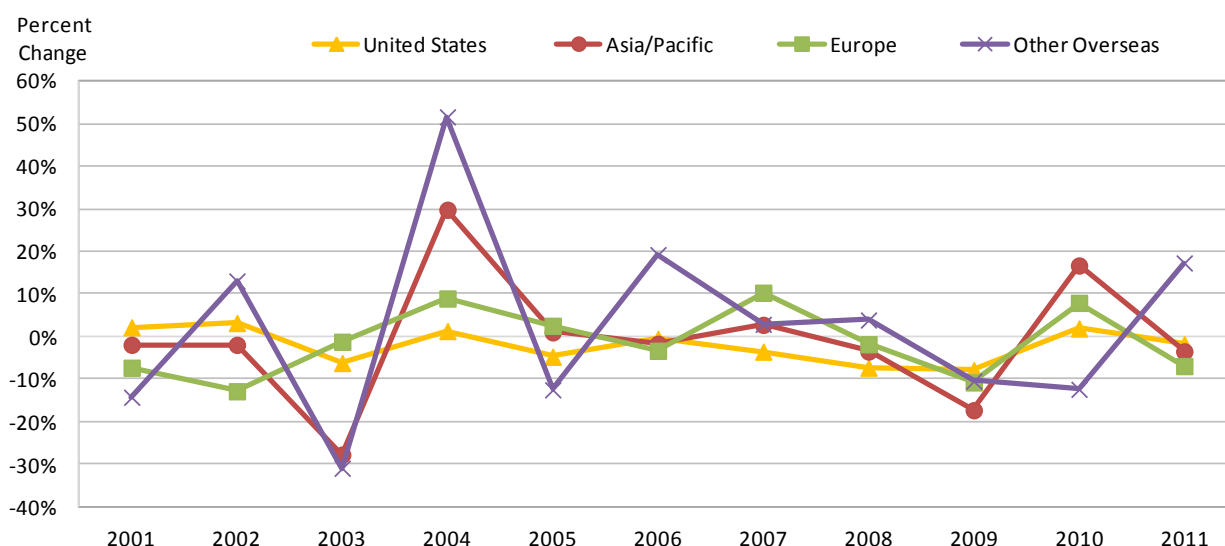
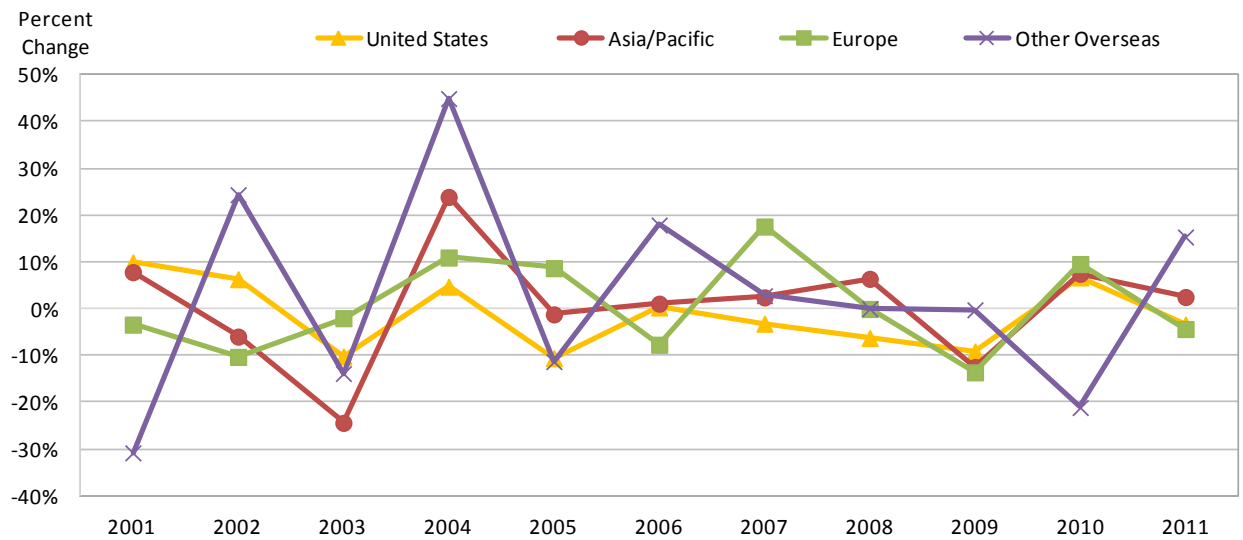


FIGURE 41: INTERNATIONAL VISITOR EXPENDITURE GROWTH RATES BY MARKET ORIGIN (2001 TO 2011)



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	2011	% Change from 2010	% Change from 2001
Total Tourism Revenue	\$13.4B	↑ 1.4%	↑ 39%
Accommodation Room Revenue ^A	Data not available		
Municipal Regional District Tax Revenue ^A	\$1.49B	↓ 4%	Na
Provincial Tax Revenue	\$1.13B	↑ 23%	↑ 61%
Export Revenue	\$3.2B	↓ 1.4%	↓ 12%
Gross Domestic Product (2002 constant dollars)	\$6.5B	↑ 1.2%	↑ 23%
Tourism-Related Businesses	18,034	↑ 0.5%	↓ 0.4%
Tourism Employment	126,700	↓ 0.5%	↑ 15%
Tourism Wages & Salaries	\$4.4B	↓ 0.7%	↑ 30%
Average Tourism Compensation	\$35K	↓ 0.2%	↑ 12%
Domestic Visitor Volume ^B	11.4M (2010)	↑ 7% (2009)	↑ 18% (2006)
International Visitor Volume	4.3M	↓ 2.3%	↓ 20%
Domestic Visitor Expenditures ^B	\$4.6B (2010)	↓ 1.3 (2009)	↑ 13% (2006)
International Visitor Expenditures	\$3.2B	↓ 1.4%	↓ 12%

^A 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.

^B Domestic market origin data (visitor volume and expenditures) was not available at time of publication of this report. Domestic visitor data in this table and elsewhere in this report refer to 2010 numbers, and comparisons are to 2009 and 2006.

Tourism Revenues and GDP

Tourism revenue measures the money received by businesses, individuals, and governments due to tourism activities. Accurate tourism revenues are difficult to obtain, as several sectors contribute to the industry. As of 2009, tourism revenue estimates have been based on a supply-side approach in 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 \$13.4 billion in 2011.
 - 32% was generated by the accommodation & food services sector
 - 31% by transportation, and 28% 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 \$1.49 billion in 2011.
 - 65% came from the Vancouver, Coast & Mountains region, while another 14% came from Vancouver Island, and 12% from the Thompson Okanagan.
- Tourism-related provincial tax revenue was \$1.13 billion in 2011.
- Tourism export revenue totalled \$3.2 billion in 2011.
 - Agriculture & fish products (\$2.5B) and mineral products (\$3.5B) generated similar export revenues, while forest products (\$10.0B) and energy demand (\$10.1B) both remained as larger primary resource commodities for BC.
- Tourism industry contributed \$6.5 billion of added value in gross domestic product in 2011, more than other primary resource industries.
 - 36% was accounted for by the accommodation & food services sector
 - 36% by transportation, and 10% by retail services.
 - Agriculture & fish products contributed only a quarter of the tourism industry's contribution to GDP (\$1.7B), forestry contributed less than half than tourism did (\$2.8B), while mining, oil & gas extraction was the most similar primary resource industry in contributions to GDP (\$4.8B), compared with the tourism industry.

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.

- 18,034 tourism-related businesses were in operation in BC in 2011.
 - 34% had one to four employees, 22% had five to nine employees, 20% employed 10 to 19 people, and 16% employed 20 to 49 people.
 - 57% of businesses were in the Vancouver, Coast & Mountains region, 17% on Vancouver Island and 12% in the Thompson Okanagan.
 - 66% of establishments were in the accommodation & food sector, and 18% were of the transportation sector.
- 126,700 people were employed in the tourism industry in 2011.
 - 50% of employment was in accommodation & food services, 26% were in transportation, and 14% were in retail services.
 - 63% of employment was in the Vancouver, Coast & Mountains region, 16% on Vancouver Island, and 11% in the Thompson Okanagan.
- \$4.4 billion was paid in wages and salaries in the tourism industry in 2011.
 - 38% of wages and salaries was paid in the transportation sector, 36% was paid in the accommodation & food sector, and 12% went to retail services.
- Average annual compensation in the tourism industry in 2011 was \$34,538.
 - Transportation earned the highest average compensation (\$51K), followed by retail services (\$29K), and accommodation & food services (\$25K).

Domestic & International Overnight Visitors and Expenditures

Overnight travellers to BC (i.e., one or more nights were spent in BC) can be either international or domestic visitors, and visit for a variety of purposes (i.e., leisure, business, personal). *Note that domestic market origin data is based on 2010 numbers.*

- 11.4 million domestic tourists visited BC in 2010, and spent \$4.6 billion.
 - 74% were BC residents, 18% were from Alberta, 4% from Ontario, 2% from the Prairies, and less than 1% each from either Quebec or the Atlantic.
 - 54% of expenditures were from BC residents, 27% was spent by Albertans, 12% by the Ontario market, 5% by Prairie visitors, 2% by Quebecois, and 1% by Atlantic visitors.
- 4.3 million international tourists visited BC in 2011, and spent \$3.2 billion.
 - 68% were from the US (mainly Washington and California), 16% were from Asia/Pacific, 13% from Europe (mainly the UK and Germany), 1.3% from Mexico, and 1.3% from other overseas markets.
 - 46% of expenditures were from US visitors, 27% was spent by the Asia/Pacific, 23% by Europeans, 2% by Mexicans, and 2% by other overseas markets.

APPENDIX A

Detailed tables

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TABLE 1: SUMMARY OF KEY ECONOMIC INDICATORS²⁷ FOR THE TOURISM INDUSTRY AND YEAR-OVER-YEAR CHANGE

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Total revenue (\$ millions)	\$9,582	\$9,720	\$9,799	\$10,717	\$11,465	\$12,208	\$12,928	\$13,351	\$12,576	\$13,169	\$13,354
% change	2.6%	1.4%	0.8%	9.4%	7.0%	6.5%	5.9%	3.3%	-5.8%	4.7%	1.4%
Total provincial taxes ²⁸ (\$ millions)	\$698	\$685	\$700	\$764	\$814	\$884	\$923	\$895	\$853	\$912	\$1,125
% change	-8.5%	-1.9%	2.2%	9.1%	6.5%	8.6%	4.4%	-3.0%	-4.7%	6.9%	23.4%
Tourism export revenue (\$ millions)	\$3,650	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049	\$3,240	\$3,194
% change	5.2%	0.4%	-12.3%	11.0%	-4.7%	-0.7%	2.7%	-1.5%	-10.7%	6.3%	-1.4%
Gross Domestic Product (GDP; \$2002 millions)	\$5,273	\$5,238	\$5,261	\$5,579	\$5,883	\$6,080	\$6,285	\$6,404	\$6,175	\$6,386	\$6,463
% change	0.2%	-0.7%	0.4%	6.0%	5.4%	3.3%	3.4%	1.9%	-3.6%	3.4%	1.2%
Total establishments	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,034
% change	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%	0.7%	0.5%
Tourism employment ('000)	109.9	110.1	112.2	115.2	118.3	122.9	126.8	130.6	128.4	127.4	126.7
% change	7.3%	0.2%	1.9%	2.7%	2.7%	3.9%	3.2%	3.0%	-1.7%	-0.8%	-0.5%
Wages and salaries (\$ millions)	\$3,378	\$3,355	\$3,388	\$3,609	\$3,832	\$4,128	\$4,351	\$4,519	\$4,342	\$4,409	\$4,376
% change	5.6%	-0.7%	1.0%	6.5%	6.2%	7.7%	5.4%	3.9%	-3.9%	01.5%	-0.7%
International visitors ('000)	5,307	5,345	4,844	5,149	4,983	4,951	4,911	4,630	4,175	4,364	4,262
% change	0.04%	0.7%	-9.4%	6.3%	-3.2%	-0.6%	-0.8%	-5.7%	-9.8%	4.5%	-2.3%

²⁷ Source: BC Stats for all except International visitors (source: Statistics Canada)

²⁸ Provincial taxes include income, hotel, gas, and other taxes

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

Sectors		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Revenue (\$ millions)	Accommodation & food services	\$3,434	\$3,510	\$3,422	\$3,815	\$4,155	\$4,452	\$4,692	\$4,637	\$4,285	\$4,453	\$4,267
	Transportation services	\$3,031	\$2,967	\$3,004	\$3,212	\$3,507	\$3,718	\$3,880	\$4,019	\$3,780	\$4,022	\$4,198
	Retail services	\$2,437	\$2,487	\$2,568	\$2,751	\$2,920	\$3,132	\$3,390	\$3,610	\$3,428	\$3,581	\$3,768
	Other services	\$680	\$756	\$805	\$940	\$883	\$907	\$966	\$1,085	\$1,083	\$1,114	\$1,121
	Overall	\$9,582	\$9,720	\$9,799	\$10,717	\$11,465	\$12,208	\$12,928	\$13,351	\$12,576	\$13,169	\$13,354
% change	Accommodation & food services	4.8%	2.2%	-2.5%	11.5%	8.9%	7.1%	5.4%	-1.2%	-7.6%	3.9%	-4.2%
	Transportation services	-1.8%	-2.1%	1.2%	6.9%	9.2%	6.0%	4.4%	3.6%	-5.9%	6.4%	4.4%
	Retail services	4.8%	2.1%	3.3%	7.1%	6.1%	7.3%	8.2%	6.5%	-5.0%	4.5%	5.2%
	Other services	4.8%	11.2%	6.5%	16.8%	-6.1%	2.7%	4.6%	12.3%	-0.2%	2.9%	0.6%
	Overall	2.6%	1.4%	0.8%	9.4%	7.0%	6.5%	5.9%	3.3%	-5.9%	4.7%	1.4%

Source: BC Stats.

TABLE 3: ACCOMMODATION ROOM REVENUE (MRDT) AND MONTH-OVER-MONTH CHANGE BY REGION

Region		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Room revenue (\$ millions)	Kootenay Rockies	\$6,869	\$8,482	\$7,064	\$3,976	\$3,886	\$5,591	\$9,766	\$10,172	\$7,110	\$3,826	\$2,786	\$6,429
	Northern BC	\$2,949	\$3,255	\$4,294	\$3,943	\$4,531	\$5,176	\$5,772	\$5,948	\$6,185	\$5,139	\$4,185	\$3,475
	Thompson Okanagan	\$8,226	\$8,800	\$9,970	\$11,483	\$16,177	\$18,101	\$31,396	\$32,771	\$19,022	\$11,258	\$7,555	\$8,051
	Vancouver, Coast & Mtns	\$63,141	\$67,201	\$74,653	\$68,578	\$93,796	\$93,629	\$105,391	\$108,110	\$93,949	\$62,043	\$59,578	\$70,109
	Vancouver Island	\$9,197	\$10,203	\$13,076	\$13,572	\$19,201	\$22,451	\$31,961	\$34,471	\$23,003	\$14,594	\$9,487	\$10,155
	Overall	\$90,381	\$97,941	\$109,056	\$101,552	\$137,590	\$144,947	\$184,286	\$191,471	\$149,268	\$96,861	\$83,590	\$98,219
% change	Kootenay Rockies	7.2%	5.6%	2.0%	4.9%	6.0%	2.3%	8.0%	3.5%	12.3%	2.1%	6.4%	6.5%
	Northern BC	11.4%	11.9%	8.4%	3.4%	10.7%	3.6%	17.0%	13.2%	25.2%	17.2%	14.8%	25.1%
	Thompson Okanagan	4.0%	5.4%	-6.0%	5.5%	3.1%	0.1%	3.7%	6.3%	0.0%	-1.9%	8.3%	4.9%
	Vancouver, Coast & Mtns	-5.7%	-64.6%	-9.1%	8.9%	19.1%	9.4%	11.2%	2.9%	8.1%	-13.8%	9.7%	5.8%
	Vancouver Island	21.5%	7.7%	-3.3%	-5.0%	5.4%	0.0%	-0.6%	1.4%	-4.3%	-2.6%	-6.3%	4.6%
	Overall	-1.2%	-55.2%	-6.9%	6.1%	14.2%	6.1%	7.6%	3.5%	5.7%	-9.1%	7.6%	6.2%

Source: BC Stats.

TABLE 4: COMPARING EXPORT REVENUES FOR BC'S PRIMARY COMMODITIES

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Forest industry	\$14,940	\$14,353	\$12,997	\$15,081	\$14,134	\$13,560	\$12,282	\$10,107	\$7,602	\$9,143	\$9,983
<i>Wood products</i>	\$9,374	\$9,284	\$8,239	\$10,062	\$9,485	\$8,776	\$7,164	\$5,408	\$4,127	\$5,106	\$5,704
<i>Pulp and paper products</i>	\$5,566	\$5,069	\$4,758	\$5,019	\$4,649	\$4,784	\$5,118	\$4,699	\$3,475	\$4,037	\$4,279
Agriculture and fish	\$2,350	\$2,420	\$2,371	\$2,416	\$2,371	\$2,422	\$2,332	\$2,484	\$2,424	\$2,524	\$2,512
<i>Agriculture and food</i>	\$1,385	\$1,406	\$1,390	\$1,442	\$1,386	\$1,443	\$1,435	\$1,585	\$1,555	\$1,579	\$1,613
<i>Fish products</i>	\$965	\$1,014	\$981	\$974	\$985	\$978	\$897	\$899	\$869	\$945	\$898
Metallic mineral products	\$1,336	\$1,420	\$1,535	\$2,089	\$2,705	\$3,581	\$3,430	\$3,336	\$2,503	\$3,163	\$3,492
Energy products	\$6,366	\$3,713	\$4,847	\$4,549	\$7,801	\$6,455	\$6,196	\$9,623	\$6,864	\$8,038	\$10,066
Tourism industry	\$3,650	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049	\$3,240	\$ 3,194

Source: BC Stats.

TABLE 5: TOURISM GDP USING 2002 DOLLARS AND YEAR-OVER-YEAR CHANGE BY SECTOR

Sectors		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
GDP (\$ millions)	Accommodation & food services	\$1,908	\$1,955	\$1,943	\$2,079	\$2,162	\$2,211	\$2,286	\$2,378	\$2,252	\$2,312	\$2,319
	Transportation services	\$1,950	\$1,831	\$1,785	\$1,905	\$2,109	\$2,171	\$2,229	\$2,224	\$2,150	\$2,254	\$2,319
	Retail services	\$514	\$508	\$540	\$565	\$586	\$639	\$672	\$677	\$656	\$675	\$674
	Other services	\$907	\$945	\$993	\$1,030	\$1,026	\$1,059	\$1,098	\$1,125	\$1,117	\$1,146	\$1,152
	Overall	\$5,273	\$5,238	\$5,261	\$5,579	\$5,883	\$6,080	\$6,285	\$ 6,404	\$6,175	\$6,386	\$ 6,463
% change	Accommodation & food services	-0.9%	2.5%	-0.6%	7.0%	4.0%	2.3%	3.4%	4.0%	-5.3%	2.7%	0.3%
	Transportation services	-1.9%	-6.1%	-2.5%	6.7%	10.7%	2.9%	2.7%	-0.2%	-3.3%	4.8%	2.9%
	Retail services	5.1%	-1.2%	6.3%	4.6%	3.7%	9.0%	5.2%	0.7%	-3.1%	2.9%	-0.1%
	Other services	5.0%	4.2%	5.1%	3.7%	-0.4%	3.2%	3.7%	2.5%	-0.7%	2.6%	0.5%
	Overall	0.2%	-0.7%	0.4%	6.0%	5.4%	3.3%	3.4%	1.9%	-3.6%	3.4%	1.2%

Source: BC Stats.

TABLE 6: COMPARING GDP OF TOURISM SECTORS USING AN INDEX WHERE 2002 = 100

Sectors	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Accommodation & food services	98	100	99	106	111	113	117	122	115	118	119
Transportation services	106	100	97	104	115	119	122	121	117	123	127
Retail services	101	100	106	111	115	126	132	133	129	133	133
Other services	96	100	105	109	109	112	116	119	118	121	122
Tourism industry	101	100	100	107	112	116	120	122	118	122	123

Source: BC Stats.

TABLE 7: COMPARING GDP OF BC PRIMARY RESOURCE INDUSTRIES (2002 = 100)

	Industries	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
GDP (\$ millions)	Agriculture	\$1,834	\$1,716	\$1,739	\$1,745	\$1,777	\$1,789	\$1,774	\$1,695	\$1,686	\$1,658	\$1,658
	Forestry	\$2,647	\$2,713	\$2,761	\$3,129	\$3,102	\$3,022	\$2,855	\$2,463	\$2,168	\$2,514	\$2,797
	Mining, oil and gas extraction	\$4,252	\$4,383	\$4,298	\$4,270	\$4,643	\$4,645	\$4,422	\$4,598	\$4,293	\$4,595	\$4,873
	Tourism	\$5,273	\$5,238	\$5,261	\$5,579	\$5,883	\$6,080	\$6,285	\$6,404	\$6,175	\$6,386	\$6,463
Index (2002 = 100)	Agriculture	107	100	101	102	104	104	103	99	98	97	96
	Forestry	98	100	102	115	114	111	105	91	80	93	103
	Mining, oil and gas extraction	97	100	98	97	106	106	101	105	98	105	111
	Tourism	101	100	100	106	112	116	120	121	118	122	123

Source: BC Stats <http://www.bcstats.gov.bc.ca/StatisticsBySubject/Economy/EconomicAccounts.aspx>.

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

Business size		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Establishments	1 to 4 employees	7,842	7,737	8,302	7,995	8,177	8,256	6,179	6,121	6,177	6,208	6,182
	5 to 9 employees	3,259	3,260	3,234	3,266	3,133	3,170	3,886	3,816	3,823	3,830	3,897
	10 to 19 employees	2,974	2,991	3,038	3,007	2,980	2,937	3,538	3,687	3,684	3,576	3,636
	20 to 49 employees	2,490	2,563	2,235	2,408	2,454	2,438	2,691	2,744	2,744	2,949	2,958
	50 to 199 employees	1,270	1,316	1,178	1,221	1,204	1,220	1,230	1,248	1,230	1,226	1,223
	200 or more employees	131	129	127	138	146	166	138	158	156	154	138
	Overall	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,034
% change	1 to 4 employees	1.5%	-1.3%	7.3%	-3.7%	2.3%	1.0%	-25.2%	-0.9%	0.9%	0.5%	-0.4%
	5 to 9 employees	2.4%	0.0%	-0.8%	1.0%	-4.1%	1.2%	22.6%	-1.8%	0.2%	0.2%	1.7%
	10 to 19 employees	-0.6%	0.6%	1.6%	-1.0%	-0.9%	-1.4%	20.5%	4.2%	-0.1%	-2.9%	1.7%
	20 to 49 employees	-5.9%	2.9%	-12.8%	7.7%	1.9%	-0.7%	10.4%	2.0%	0.0%	7.5%	0.3%
	50 to 199 employees	-5.9%	3.6%	-10.5%	3.7%	-1.4%	1.3%	0.8%	1.5%	-1.4%	-0.3%	-0.2%
	200 or more employees	0.0%	-1.5%	-1.6%	8.7%	5.8%	13.7%	-16.9%	14.5%	-1.3%	-1.3%	-10.4%
	Overall	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%	0.7%	0.5%

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

Source: BC Stats.

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

Sectors		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Establishments	Food & beverage	9,450	9,491	9,636	9,586	9,603	9,511	9,412	9,545	9,609	9,913	9,984
	Accommodation	2,108	2,071	2,032	2,015	2,027	2,028	1,927	1,927	1,906	1,913	1,896
	Transportation	3,502	3,483	3,494	3,472	3,485	3,563	3,369	3,356	3,389	3,260	3,257
	Amusement, gambling & recreation	1,822	1,824	1,794	1,756	1,746	1,780	1,760	1,751	1,714	1,676	1,695
	Performing arts & sports	886	929	968	963	1,010	1,089	983	994	984	973	994
	Heritage institutions	198	198	190	243	223	216	211	201	212	208	208
	Overall	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,034
% change	Food & beverage	-0.8%	0.4%	1.5%	-0.5%	0.2%	-1.0%	-1.0%	1.4%	0.7%	3.2%	5.7%
	Accommodation	-0.7%	-1.8%	-1.9%	-0.8%	0.6%	0.0%	-5.0%	0.0%	-1.1%	0.4%	-10.1%
	Transportation	-0.7%	-0.5%	0.3%	-0.6%	0.4%	2.2%	-5.4%	-0.4%	1.0%	-3.8%	-7.0%
	Amusement, gambling & recreation	0.3%	0.1%	-1.6%	-2.1%	-0.6%	1.9%	-1.1%	-0.5%	-2.1%	-2.2%	-7.0%
	Performing arts & sports	6.6%	4.9%	4.2%	-0.5%	4.9%	7.8%	-9.7%	1.1%	-1.0%	-1.1%	12.2%
	Heritage institutions	-1.5%	0.0%	-4.0%	27.9%	-8.2%	-3.1%	-2.3%	-4.7%	5.5%	-1.9%	5.1%
	Overall	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%	0.7%	0.4%

Source: BC Stats.

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

Region		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Establishments	Vancouver Island	2,460	2,421	2,991	2,994	2,994	3,014	2,933	2,998	3,014	3,091	3,056
	Vancouver, Coast & Mtns	9,767	9,847	10,190	10,169	10,323	10,346	9,964	10,014	10,122	10,167	10,253
	Thompson Okanagan	2,046	2,037	2,343	2,329	2,302	2,339	2,168	2,231	2,200	2,206	2,176
	Kootenay Rockies	744	733	940	903	884	882	854	873	862	860	864
	Cariboo Chilcotin Coast	208	197	368	369	355	365	360	376	357	351	354
	Northern BC	1,033	1,020	1,259	1,234	1,202	1,201	1,144	1,132	1,131	1,137	1,158
	<i>Standard geographic coding not available</i>	<i>1,708</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>173</i>
	Overall	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,034
% change	Vancouver Island				0.1%	0.0%	0.7%	-2.7%	2.2%	0.5%	2.6%	-1.1%
	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.			-0.2%	1.5%	0.2%	-3.7%	0.5%	1.1%	0.4%	0.8%
	Thompson Okanagan				-0.6%	-1.2%	1.6%	-7.3%	2.9%	-1.4%	0.3%	-1.4%
	Kootenay Rockies				-3.9%	-2.1%	-0.2%	-3.2%	2.2%	-1.3%	-0.2%	0.5%
	Cariboo Chilcotin Coast				0.3%	-3.8%	2.8%	-1.4%	4.4%	-5.1%	-1.7%	0.9%
	Northern BC				-2.0%	-2.6%	-0.1%	-4.7%	-1.0%	-0.1%	0.5%	1.8%
	Overall	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%	0.7%	0.5%

Source: BC Stats.

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

Sectors		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Employment	Accommodation & food services	54,000	54,900	55,500	56,100	57,900	60,800	62,600	64,800	63,400	63,300	62,900
	Transportation services	29,800	28,300	29,200	30,000	31,400	31,900	33,000	33,500	32,900	32,800	32,600
	Retail services	14,200	14,800	15,400	15,900	16,400	17,200	18,000	18,500	18,000	17,500	17,400
	Other services	12,000	12,200	12,200	13,300	12,700	13,000	13,200	13,800	13,800	13,900	13,900
	Overall	109,900	110,100	112,200	115,200	118,300	122,900	126,800	136,600	128,700	127,400	126,700
% change	Accommodation & food services	6.1%	1.7%	1.1%	1.1%	3.2%	5.0%	3.0%	3.5%	-2.2%	-0.2%	-0.6%
	Transportation services	7.6%	-5.0%	3.2%	2.7%	4.7%	1.6%	3.4%	1.5%	-1.8%	-0.3%	-0.6%
	Retail services	6.8%	4.2%	4.1%	3.2%	3.1%	4.9%	4.7%	2.8%	-2.7%	-2.8%	-0.6%
	Other services	15.4%	1.7%	0.0%	9.0%	-4.5%	2.4%	1.5%	4.5%	2.2%	-1.4%	0.0%
	Overall	7.3%	0.2%	1.9%	2.7%	2.7%	3.9%	3.2%	3.0%	-1.7%	-0.8%	-0.5%

Source: BC Stats.

TABLE 12: TOURISM EMPLOYMENT AND YEAR-OVER-YEAR CHANGE BY REGION

Region		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Tourism Employment	Vancouver Island	16,900	18,400	17,600	20,400	20,500	20,600	20,400	22,100	21,300	19,300	20,100
	Vancouver, Coast & Mtns	69,900	68,600	71,100	72,000	72,800	75,800	79,500	80,100	80,500	81,200	79,700
	Thompson Okanagan	10,600	11,400	12,200	12,000	13,100	12,900	13,800	14,200	13,500	14,100	13,900
	Kootenay Rockies	4,600	4,200	4,300	3,300	4,100	5,300	4,800	5,400	4,600	4,700	4,800
	Cariboo Chilcotin Coast	1,400	1,300	1,400	1,600	1,500	1,700	1,600	1,600	1,500	1,500	1,500
	Northern BC	6,100	6,000	5,900	6,100	6,400	6,800	6,700	7,200	7,100	6,500	6,500
	Overall	109,900	110,100	112,200	115,200	118,300	122,900	126,800	130,600	128,400	127,400	126,700
% change	Vancouver Island	0.0%	8.9%	-4.3%	15.9%	0.5%	0.5%	-1.0%	8.3%	-3.6%	-9.4%	4.1%
	Vancouver, Coast & Mtns	9.4%	-1.9%	3.6%	1.3%	1.1%	4.1%	4.9%	0.8%	0.5%	0.9%	-1.8%
	Thompson Okanagan	-2.8%	7.5%	7.0%	-1.6%	9.2%	-1.5%	7.0%	2.9%	-4.9%	4.4%	-1.4%
	Kootenay Rockies	21.1%	-8.7%	2.4%	-23.3%	24.2%	29.3%	-9.4%	12.5%	-14.8%	2.2%	2.1%
	Cariboo Chilcotin Coast	0.0%	-7.1%	7.7%	14.3%	-6.3%	13.3%	-5.9%	0.0%	-6.3%	0.0%	0.0%
	Northern BC	7.0%	-1.6%	-1.7%	3.4%	4.9%	6.3%	-1.5%	7.5%	-1.4%	-8.5%	0.0%
	Overall	7.3%	0.2%	1.9%	2.7%	2.7%	3.9%	3.2%	3.0%	-1.7%	-0.8%	-0.5%

Source: BC Stats.

TABLE 13: TOURISM WAGES AND SALARIES AND YEAR-OVER-YEAR CHANGE BY SECTOR

Sectors		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Wages & salaries (\$ millions)	Accommodation & food services	\$1,215	\$1,208	\$1,234	\$1,336	\$1,419	\$1,521	\$1,600	\$1,656	\$1,523	\$1,598	\$1,572
	Transportation services	\$1,396	\$1,349	\$1,334	\$1,401	\$1,509	\$1,653	\$1,761	\$1,829	\$1,750	\$1,689	\$1,669
	Retail services	\$315	\$326	\$344	\$366	\$395	\$427	\$459	\$491	\$486	\$500	\$505
	Other services	\$452	\$472	\$476	\$505	\$509	\$527	\$530	\$544	\$583	\$622	\$630
	Overall	\$3,378	\$3,355	\$3,388	\$3,609	\$3,832	\$4,128	\$4,351	\$4,519	\$4,342	\$4,409	\$4,376
% change	Accommodation & food services	9.1%	-0.6%	2.2%	8.3%	6.2%	7.2%	5.2%	3.5%	-8.0%	4.9%	-1.6%
	Transportation services	-0.1%	-3.4%	-1.1%	5.0%	7.7%	9.5%	6.5%	3.9%	-4.3%	-3.5%	-1.2%
	Retail services	10.9%	3.5%	5.5%	6.4%	7.9%	8.1%	7.5%	7.0%	-1.0%	2.9%	1.0%
	Other services	11.3%	4.4%	0.8%	6.1%	0.8%	3.5%	0.6%	2.6%	7.2%	6.7%	1.3%
	Overall	5.6%	-0.7%	1.0%	6.5%	6.2%	7.7%	5.4%	3.9%	-3.9%	1.5%	-0.7%

Source: BC Stats.

TABLE 14: DOMESTIC VISITOR VOLUME AND YEAR-OVER YEAR CHANGE BY MARKET ORIGIN (2006 TO 2010)

Market	Volume (thousands)					% change				
	2006	2007	2008	2009	2010	06-07	07-08	08-09	09-10	06-10
British Columbia	7,140	6,859	7,114	7,687	8,415	-4%	4%	8%	10%	18%
Alberta	1,507	1,890	2,002	2,130	2,095	25%	6%	6%	-2%	39%
Ontario	540	506	472	462	468	-6%	-7%	-2%	1%	-13%
Quebec	125	88	105	90	86	-30%	20%	-14%	-5%	-32%
Prairies	264	248	236	252	263	-6%	-5%	7%	4%	-0.4%
Atlantic	44	43	40	41	38	-2%	-6%	3%	-8%	-13%
Overall	9,621	9,635	9,970	10,663	11,365	0.1%	4%	7%	7%	18%

Source: Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC). Migration from the Canadian Travel Survey (pre 2005) to the Travel Survey of Residents of Canada, which started in 2005, does not allow comparisons with previous years.

TABLE 15: DOMESTIC VISITOR EXPENDITURES AND YEAR-OVER YEAR CHANGE BY MARKET ORIGIN (2006 TO 2010)

Market	Expenditures (\$ millions)					% change				
	2006	2007	2008	2009	2010	06-07	07-08	08-09	09-10	06-10
British Columbia	\$2,019	\$2,117	\$2,397	\$2,471	\$2,505	5%	13%	3%	1.4%	24%
Alberta	\$870	\$1,111	\$1,319	\$1,269	\$1,234	28%	19%	-4%	-3%	42%
Ontario	\$729	\$533	\$671	\$589	\$548	-27%	26%	-12%	-7%	-25%
Quebec	\$234	\$82	\$127	\$99	\$77	-65%	55%	-23%	-22%	-67%
Prairies	\$221	\$224	\$235	\$212	\$216	2%	5%	-10%	2%	-2%
Atlantic	\$49	\$64	\$56	\$63	\$62	30%	-13%	14%	-3%	25%
Overall	\$4,122	\$4,131	\$4,804	\$4,703	\$4,643	0.2%	16%	-2%	-1%	13%

Source: Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC). Migration from the Canadian Travel Survey (pre 2005) to the Travel Survey of Residents of Canada, which started in 2005, does not allow comparisons with previous years.

TABLE 16: INTERNATIONAL VISITOR VOLUME BY MARKET ORIGIN

Market		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Volume (thousands)	United States	3,783	3,904	3,663	3,711	3,536	3,518	3,394	3,147	2,899	2,955	2,904
	Washington	1,532	1,577	1,422	1,393	1,332	1,257	1,201	1,187	1,153	1,134	1,152
	California	616	553	515	530	466	488	474	419	375	414	418
	Oregon	191	179	190	212	202	209	188	162	148	186	194
	Arizona	75	74	64	69	86	75	78	64	61	54	63
	Florida	63	102	107	108	104	93	91	93	65	85	84
	Texas	118	144	107	106	123	136	127	117	118	91	76
	Asia/Pacific	814	799	577	750	757	744	765	738	611	713	688
	Japan	257	264	149	200	204	183	172	125	84	105	86
	Taiwan	109	96	63	98	91	88	75	49	37	41	43
	Hong Kong	81	79	53	66	62	58	63	77	60	69	61
	Australia	94	93	92	107	113	119	144	142	129	126	137
	South Korea	98	103	94	104	107	120	110	104	73	94	88
	China	53	57	43	68	65	65	69	90	92	109	130
	New Zealand	20	14	21	18	21	23	25	36	31	35	24
	India	7	5	7	10	8	9	22	23	26	48	29
	Europe	618	539	533	580	595	576	635	624	557	601	559
	United Kingdom	286	254	258	288	298	289	324	293	235	231	216
	Germany	135	107	103	116	111	104	101	112	111	120	102
	Netherlands	40	36	40	45	43	45	48	50	43	50	41
	France	20	21	23	24	17	19	23	27	25	31	35
	Mexico	45	54	27	57	59	62	69	82	64	54	55
	Other overseas	46	50	45	51	35	51	48	39	44	41	56
	TOTAL INTERNATIONAL	5,307	5,345	4,844	5,149	4,983	4,951	4,911	4,6304	4,175	4,364	4,262

Source: Statistics Canada: International Travel Survey

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

Market		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	01-11
Volume (percent change)	United States	3%	-6%	1%	-5%	-1%	-4%	-7%	-8%	2%	-2%	-17%	-23%
	Washington	3%	-10%	-2%	-4%	-6%	-4%	-1%	-3%	-2%	2%	-8%	7%
	California	-10%	-7%	3%	-12%	5%	-3%	-12%	-10%	10%	1%	-14%	-32%
	Oregon	-6%	6%	12%	-5%	3%	-10%	-14%	-9%	26%	5%	-7%	2%
	Arizona	-2%	-14%	7%	25%	-13%	4%	-18%	-5%	-10%	16%	-16%	-16%
	Florida	61%	4%	1%	-4%	-10%	-3%	2%	-30%	30%	-1%	-10%	33%
	Texas	22%	-26%	-1%	15%	11%	-7%	-7%	0%	-23%	-17%	-44%	-36%
	Asia/Pacific	-2%	-28%	30%	1%	-2%	3%	-3%	-17%	17%	-3%	-8%	-15%
	Japan	3%	-44%	34%	2%	-10%	-6%	-28%	-33%	26%	-18%	-53%	-67%
	Taiwan	-12%	-34%	54%	-7%	-3%	-14%	-35%	-25%	11%	5%	-51%	-61%
	Hong Kong	-3%	-33%	25%	-6%	-7%	10%	22%	-22%	16%	-13%	5%	-25%
	Australia	0%	-1%	16%	5%	6%	21%	-2%	-9%	-2%	9%	15%	46%
	South Korea	5%	-8%	10%	3%	12%	-8%	-6%	-30%	28%	-7%	-27%	-10%
	China	9%	-24%	57%	-4%	0%	6%	30%	2%	18%	20%	100%	148%
	New Zealand	-29%	48%	-13%	14%	10%	8%	44%	-14%	13%	-32%	3%	20%
	India	-26%	27%	46%	-18%	10%	140%	5%	15%	81%	-39%	224%	301%
	Europe	-13%	-1%	9%	3%	-3%	10%	-2%	-11%	8%	-7%	-3%	-10%
	United Kingdom	-11%	2%	12%	4%	-3%	12%	-9%	-20%	-2%	-6%	-25%	-24%
	Germany	-21%	-4%	12%	-4%	-6%	-3%	10%	-1%	8%	-15%	-2%	-24%
	Netherlands	-10%	12%	13%	-5%	3%	7%	5%	-16%	18%	-18%	-7%	4%
	France	4%	11%	2%	-29%	12%	23%	17%	-7%	22%	14%	86%	75%
	Mexico	19%	-50%	114%	3%	4%	12%	20%	-22%	-16%	4%	-10%	22%
	Other overseas	8%	-10%	14%	-31%	46%	-7%	-19%	15%	-7%	35%	8%	21%
	TOTAL INTERNATIONAL	1%	-9%	6%	-3%	-1%	-1%	-6%	-10%	5%	-2%	-14%	-20%

Source: Statistics Canada: International Travel Survey

TABLE 18: INTERNATIONAL VISITOR EXPENDITURES BY MARKET ORIGIN

Market		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Expenditures (\$ millions)	United States	\$1,925	\$2,047	\$1,839	\$1,925	\$1,722	\$1,727	\$1,671	\$1,567	\$1,424	\$1,519	\$1,468
	Washington	\$450	\$493	\$436	\$427	\$402	\$371	\$369	\$365	\$364	\$384	\$402
	California	\$431	\$409	\$327	\$364	\$289	\$329	\$323	\$290	\$246	\$261	\$270
	Oregon	\$90	\$84	\$94	\$89	\$90	\$88	\$94	\$95	\$91	\$97	\$90
	Arizona	\$64	\$67	\$38	\$39	\$60	\$49	\$47	\$38	\$36	\$39	\$34
	Florida	\$42	\$70	\$74	\$82	\$72	\$54	\$46	\$42	\$36	\$55	\$47
	Texas	\$74	\$97	\$65	\$82	\$88	\$92	\$80	\$83	\$77	\$72	\$54
	Asia/Pacific	\$937	\$881	\$666	\$825	\$815	\$824	\$844	\$898	\$786	\$845	\$866
	Japan	\$290	\$283	\$180	\$217	\$236	\$194	\$164	\$138	\$111	\$126	\$125
	Taiwan	\$110	\$89	\$58	\$87	\$75	\$75	\$71	\$49	\$44	\$42	\$48
	Hong Kong	\$89	\$81	\$46	\$74	\$68	\$53	\$58	\$70	\$59	\$64	\$64
	Australia	\$105	\$107	\$110	\$125	\$128	\$144	\$177	\$191	\$172	\$166	\$196
	South Korea	\$133	\$140	\$122	\$120	\$124	\$162	\$138	\$165	\$117	\$150	\$134
	China	\$67	\$58	\$54	\$95	\$68	\$75	\$101	\$121	\$135	\$132	\$140
	New Zealand	\$22	\$20	\$31	\$18	\$10	\$19	\$22	\$48	\$49	\$42	\$29
	India	\$5	\$2	\$1	\$3	\$2	\$3	\$11	\$16	\$18	\$37	\$23
	Europe	\$702	\$630	\$617	\$685	\$744	\$687	\$808	\$807	\$698	\$764	\$731
	United Kingdom	\$316	\$303	\$304	\$343	\$384	\$338	\$392	\$369	\$268	\$263	\$253
	Germany	\$159	\$124	\$122	\$124	\$143	\$126	\$113	\$147	\$156	\$163	\$146
	Netherlands	\$40	\$39	\$43	\$52	\$42	\$50	\$54	\$67	\$57	\$61	\$49
	France	\$19	\$19	\$25	\$22	\$22	\$26	\$37	\$26	\$30	\$44	\$54
	Mexico	\$41	\$58	\$42	\$75	\$74	\$79	\$83	\$96	\$89	\$67	\$66
	Other overseas	\$44	\$48	\$49	\$58	\$43	\$60	\$59	\$46	\$53	\$45	\$63
	TOTAL INTERNATIONAL	\$3,650	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049	\$3,240	\$3,194

Source: Statistics Canada: International Travel Survey

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

Market		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	01-11
Expenditures (percent change)	United States	10%	6%	-10%	5%	-11%	0%	-3%	-6%	-9%	7%	-3%	-24%
	Washington	7%	10%	-12%	-2%	-6%	-8%	-1%	-1%	0%	6%	5%	-11%
	California	12%	-5%	-20%	11%	-21%	14%	-2%	-10%	-15%	6%	3%	-37%
	Oregon	28%	-6%	11%	-5%	2%	-3%	7%	2%	-5%	8%	-7%	1%
	Arizona	95%	4%	-43%	2%	53%	-18%	-4%	-19%	-6%	7%	-13%	-47%
	Florida	-15%	67%	6%	10%	-13%	-25%	-14%	-10%	-13%	50%	-14%	12%
	Texas	-2%	31%	-33%	27%	7%	5%	-13%	4%	-8%	-6%	-25%	-27%
	Asia/Pacific	8%	-6%	-24%	24%	-1%	1%	2%	6%	-12%	7%	3%	-8%
	Japan	5%	-2%	-36%	21%	9%	-18%	-16%	-16%	-20%	14%	-1%	-57%
	Taiwan	-19%	-19%	-35%	50%	-14%	0%	-5%	-31%	-10%	-4%	14%	-56%
	Hong Kong	14%	-9%	-43%	60%	-8%	-22%	10%	20%	-15%	8%	0%	-28%
	Australia	1%	1%	3%	13%	2%	13%	23%	8%	-10%	-3%	18%	87%
	South Korea	2%	6%	-13%	-2%	4%	31%	-15%	19%	-29%	27%	-10%	1%
	China	72%	-13%	-7%	76%	-29%	10%	34%	20%	12%	-3%	6%	110%
	New Zealand	-2%	-11%	57%	-42%	-46%	95%	17%	114%	2%	-15%	-29%	32%
	India	-13%	-53%	-33%	136%	-33%	38%	249%	42%	10%	111%	-39%	378%
	Europe	-3%	-10%	-2%	11%	9%	-8%	18%	0%	-14%	10%	-4%	4%
	United Kingdom	-8%	-4%	0%	13%	12%	-12%	16%	-6%	-27%	-2%	-4%	-20%
	Germany	2%	-22%	-2%	2%	16%	-12%	-11%	30%	6%	5%	-10%	-8%
	Netherlands	-16%	-3%	11%	22%	-20%	20%	6%	24%	-14%	7%	-20%	23%
	France	-5%	-1%	31%	-12%	1%	18%	43%	-30%	16%	43%	24%	181%
	Mexico	-21%	40%	-27%	76%	-1%	6%	6%	16%	-7%	-25%	-1%	60%
	Other overseas	-38%	10%	1%	18%	-25%	37%	-1%	-22%	15%	-15%	40%	43%
	TOTAL INTERNATIONAL	5%	0%	-12%	11%	-5%	-1%	3%	-1%	-11%	6%	-1%	-12%

Source: Statistics Canada: International Travel Survey