



The Value of Tourism in British Columbia

Trends from 1998 to 2008

Tourism British Columbia
November 2009



MAP OF BRITISH COLUMBIA TOURISM REGIONS



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Cover photo: Canoeing in Bowron Lakes Provincial Park, the photo is available from the Tourism British Columbia Image Bank www.imagebank.tourismbc.net

1. Overview

The tourism industry plays a significant role in the BC economy in terms of revenue earned by tourism businesses, valued added to the economy by tourism activities and the creation of employment opportunities.

Tourists or visitors in BC include BC residents, Canadian residents, and international visitors. Visitors may be travelling for pleasure, business/government, or educational purposes.

Key highlights:

- In 2008, the tourism industry generated \$13.8B in revenue, a 4% increase over 2007 and a 62% increase since 1998.
- The accommodations sector – which includes hotels, motels, bed & breakfasts, and other lodgings – generated nearly \$2B in room revenue, in 2008, a 64% cumulative increase in revenue since 1998.
- In 2008, tourism generated \$937M in provincial tax revenue (income, hotel, gas and other taxes) and \$3.6B in export revenues in 2008.
- Tourism generated a direct contribution to gross domestic product (GDP) of \$6.6B, a 32% increase in GDP since 1998 (2002 constant \$).
- There were 17,774 tourism-related business establishments operating in BC in 2008. The number of establishments has remained steady since 1998.
- In 2008, the tourism industry employed 131,000 full-time equivalent employees, a 28% increase since 1998.
- Total tourism wages and salaries were \$4.7B in 2008, a 61% increase since 1998.

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 earned by businesses, individuals and governments from tourism activities.
- Gross domestic product (GDP) measures the value added to the economy from tourism activities. The cost of supplies and services used to produce goods or services are subtracted from total revenues. This measure highlights the specific contribution that the tourism industry makes to the BC economy.

Previously, it has been difficult to accurately estimate tourism revenues because the tourism industry draws from parts of several industries: accommodation and food services, retail services, transportation services and other services.

In the past, 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). 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 for the tourism industry. This new approach is similar to the methodology for calculating tourism GDP. BC Stats has developed tourism revenue estimates back to 1998.

This chapter summarizes total tourism revenues and the tourism industry's GDP between 1998 and 2008. This chapter also includes a discussion of accommodation room revenue, tax revenues, and export revenues. Detailed tables are available in Appendix A.

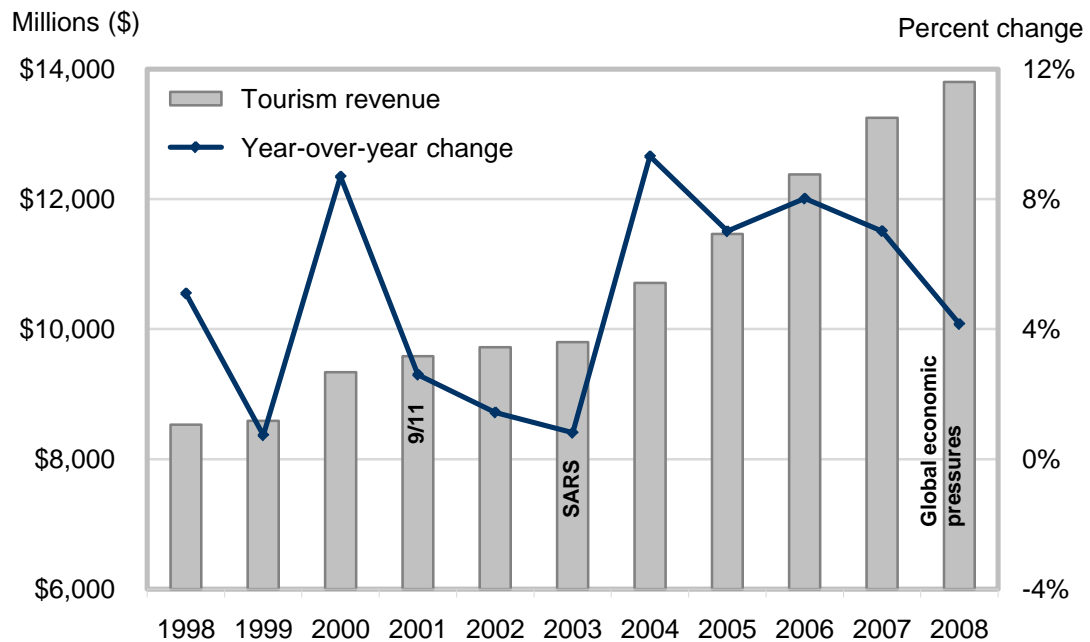
TOURISM REVENUES

Total revenue

The tourism industry generated \$13.8 billion in 2008¹, an increase of 4% from 2007 (Figure 1). Since 1998, total tourism revenues have grown 62%. Tourism revenues have grown every year between 1998 and 2008, but growth has varied considerably, cycling between highs of 9% and lows of about 1%.

¹ Source: BC Stats, BC Business Indicators, July 2009 (<http://www.bcstats.gov.bc.ca/pubs/bcbi/bcbi0907.pdf>).

FIGURE 1. OVERALL TOURISM REVENUE AND YEAR-OVER-YEAR CHANGE (1998 TO 2008).



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

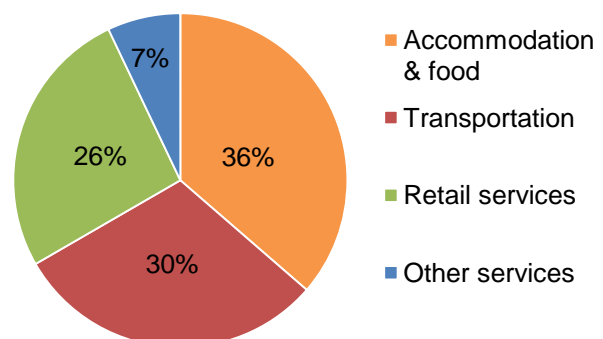
However, for business planning purposes, it is important to understand the relative importance of different markets of origin in generating revenue for the tourism industry. It is also important to have information on the extent to which growth rates differ by market of origin and visitor and trip behavior and characteristics to efficiently target marketing and development investments. This information is captured through visitor surveys, and is presented in Section 4.0 of this document.

Revenue by tourism sector

In 2008, accommodation and food services, and transportation services generated a total of two thirds of tourism revenues, while retail services accounted for another quarter of the revenue (Figure 2).

Other tourism-related services - which include vehicle rentals, tourism-related recreation and entertainment, and vacation

FIGURE 2. SHARE OF TOURISM REVENUE (2008).



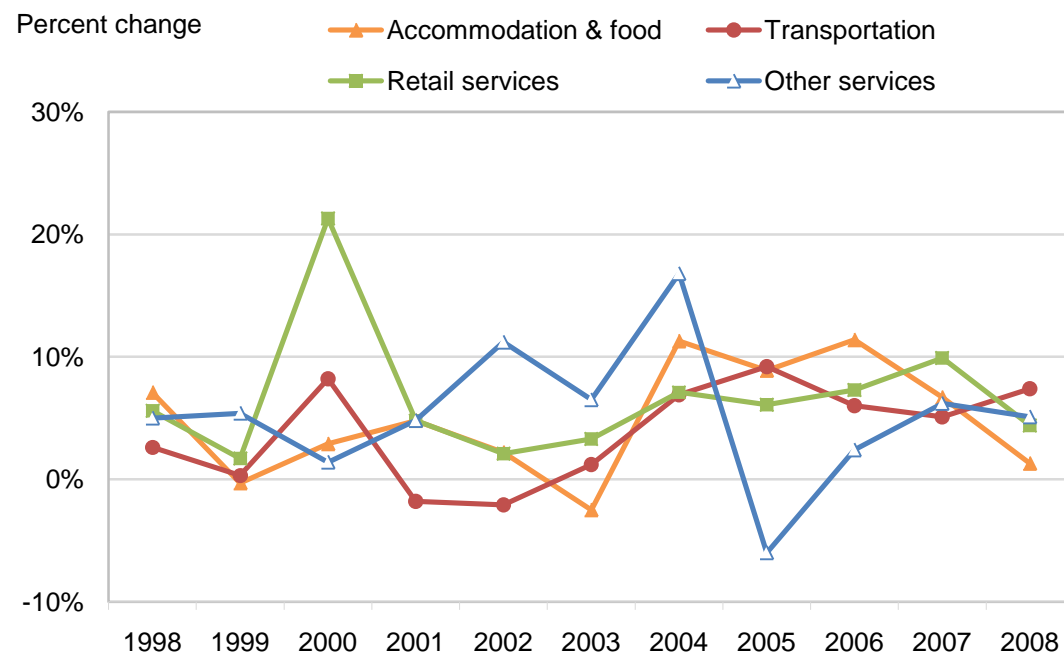
homes accounted for less than 10% of total revenues.

Since 1998, accommodation and food services and transportation services have grown by approximately 50%, while retail services and other tourism services have experienced stronger growth over the ten-year period (91% and 66% cumulative growth).

While the share of total revenue generated by each sector² has remained relatively consistent over the ten-year period, annual growth rates have fluctuated considerably since 1998 (Figure 3).

The transportation services sector had negative growth in 2001 and 2002, but has recovered to average 7% annual growth since 2004. Accommodation and food services had negative growth in 2003, rebounded to 11% in 2004 but has slid since 2006. Retail services grew 21% in 2000 and have averaged 7% growth since 2004. The growth of other tourism-related services has cycled over the years with a large decline in 2004/05.

FIGURE 3. REVENUE GROWTH RATES BY TOURISM SECTOR (1998 TO 2008).



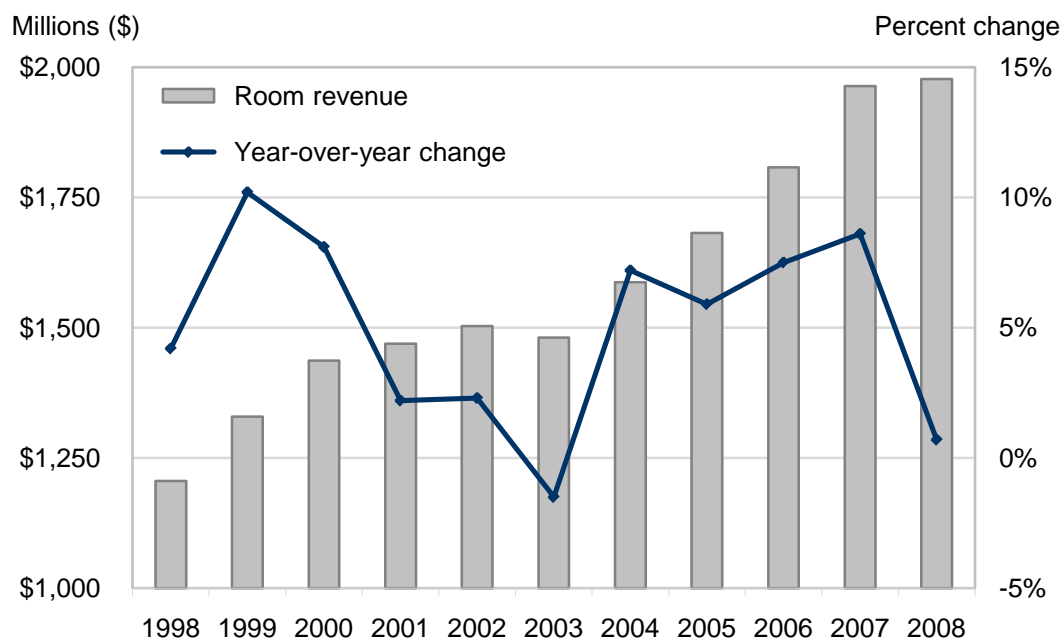
Accommodation room revenue

In 2008, the accommodations sector – which includes hotels, motels, bed & breakfasts, and other lodgings – generated nearly \$2B in room revenue, a 64% cumulative increase in revenue since 1998 (Figure 4).

² Two different terms are used to refer to industries in this document. For example, the term “retail services industry” encompasses the whole retail services industry. The tourism-related component of the retail services industry is referred to as the “retail services sector” in this document.

Accommodation room revenue had negative growth in 2003, related to the slowdown in visitation due to Severe Affected Respiratory Syndrome (SARS). Between 2004 and 2007, room revenue averaged 7% annual growth, but grew less than 1% in 2008 as global economic pressures mounted.

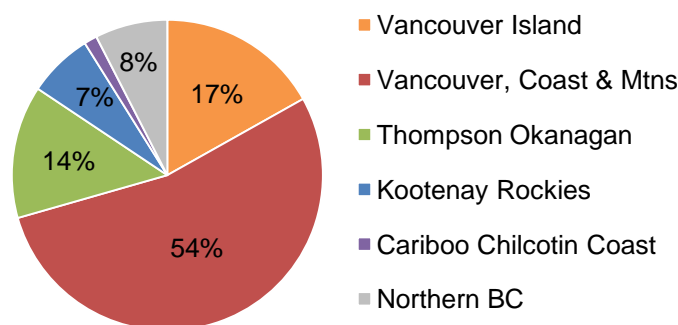
FIGURE 4. ACCOMMODATION REVENUE AND YEAR-OVER-YEAR CHANGE (1998 TO 2008).



Accommodation room revenue by region

FIGURE 5. REGIONAL SHARE OF ROOM REVENUE (2008).

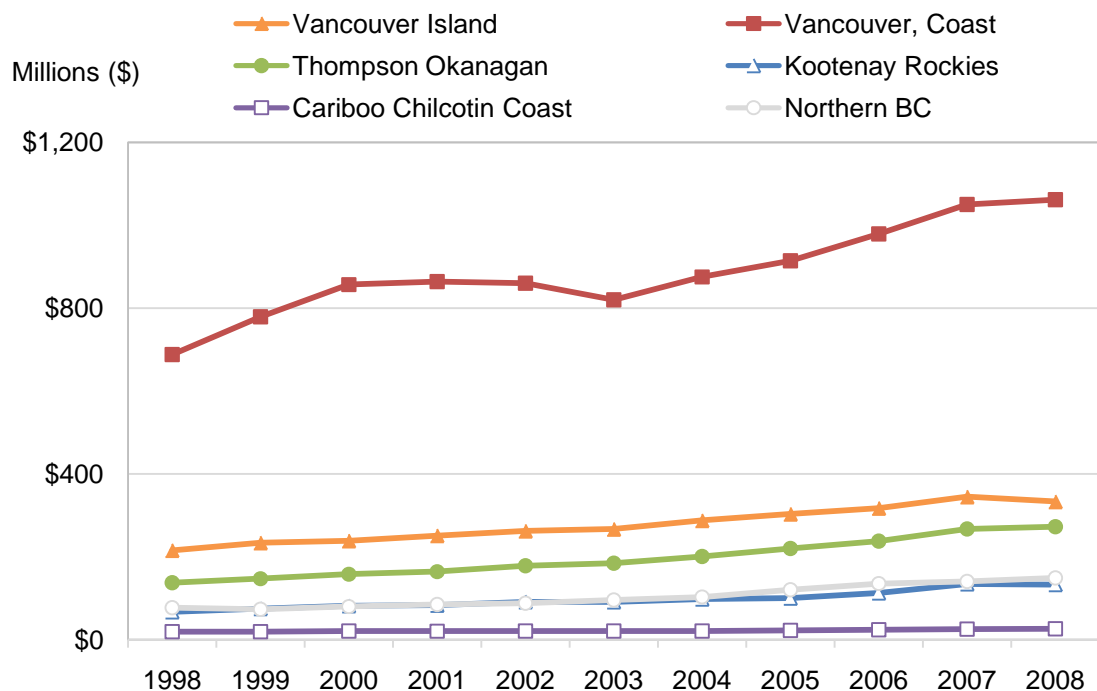
The Vancouver, Coast and Mountains region³ generates over half of BC's room revenue, followed by Vancouver Island and the Thompson Okanagan (Figure 5). The regional shares of room revenue have been fairly constant over the ten-year period.



Since 1998, room revenue has increased in each region (Figure 6). The Vancouver Island and Vancouver, Coast and Mountains regions posted 55% growth over the 10 years. While the Cariboo Chilcotin Coast saw cumulative growth of 35%, room revenue in the Northern BC, the Kootenay Rockies and the Thompson Okanagan nearly doubled (over 90% cumulative growth in each region).

³ See page 1 for map of tourism regions in British Columbia.

FIGURE 6. TOURISM ROOM REVENUES BY REGION (1998 TO 2008).



While room revenue has increased in each region over the ten years, annual growth rates in room revenue have fluctuated considerably with the widest fluctuations occurring in the three smallest regions (Figure 7). Most regions experienced low or negative growth rates in 2003, except Northern BC which posted 8.5% growth.

Between 2004 and 2007, the Vancouver Island and Vancouver, Coast & Mountains regions averaged 6.5% annual growth, while the Thompson Okanagan averaged nearly 10%. Kootenay Rockies and Northern BC regions also averaged about 10% annual growth in the same period, but their year-over-year growth rates varied considerably. Northern BC experienced strong growth in 2005 led by the Bulkley-Nechako, Fraser Fort George and Peace River/Northern BC regional districts.

In 2008, five of the six regions experienced low or negative growth rates in room revenue due to the global economic downturn, while Northern BC experienced higher growth in 2008. Most growth in Northern BC in 2008 occurred in the Peace River/Northern BC regional district.

FIGURE 7A. YEAR-OVER-YEAR CHANGE IN REGIONAL ROOM REVENUE (1998 TO 2008) FOR THE VANCOUVER ISLAND, VANCOUVER, COAST AND MOUNTAINS AND THOMPSON OKANAGAN TOURISM REGIONS.

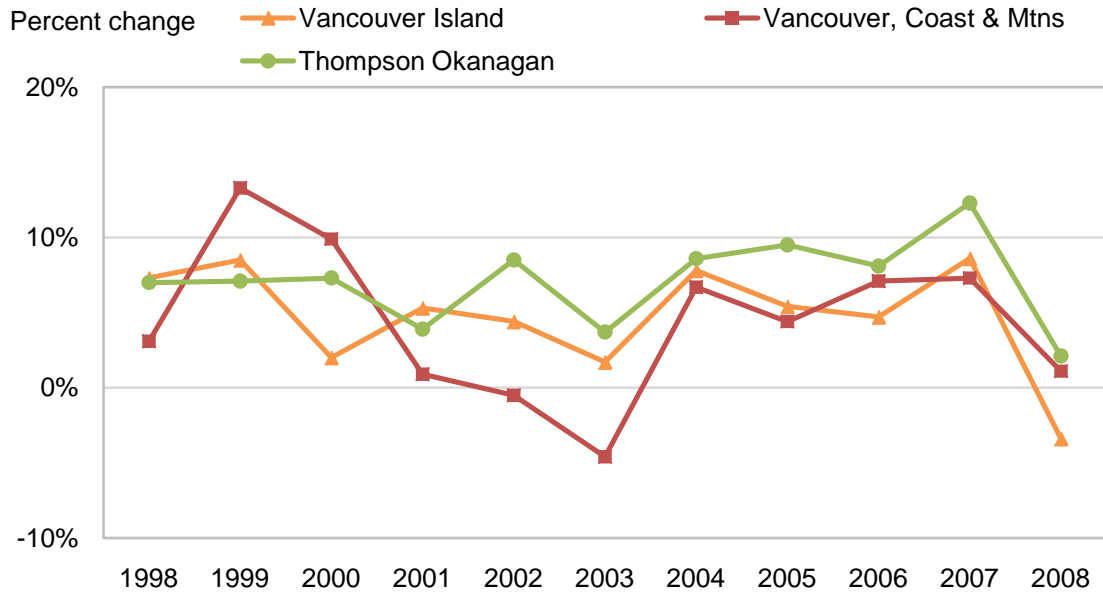
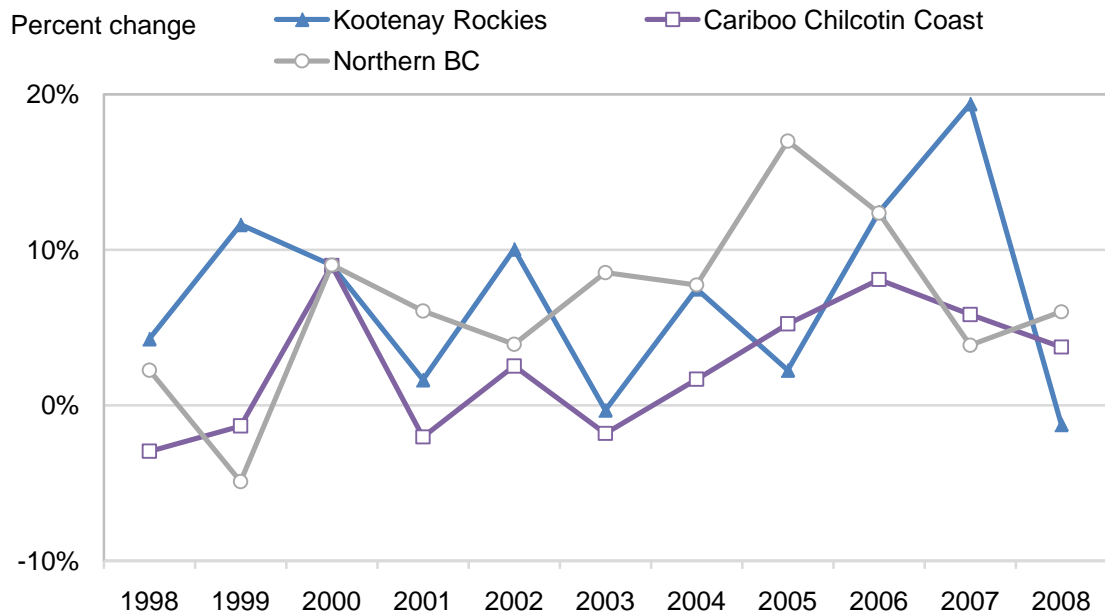


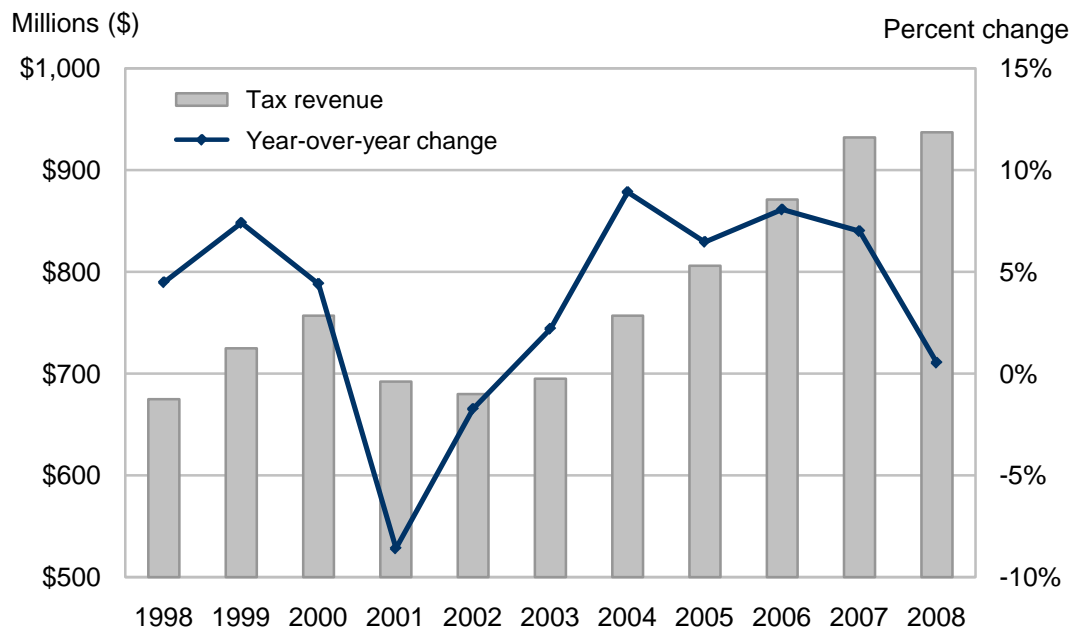
FIGURE 7B. YEAR-OVER-YEAR CHANGE IN REGIONAL ROOM REVENUE (1998 TO 2008) FOR THE KOOTENAY ROCKIES, NORTHERN BC AND CARIBOO CHILCOTIN COAST TOURISM REGIONS.



Tax revenues

In 2008, the tourism industry generated \$937M in revenue from provincial taxes, which include income, hotel, gas and other taxes (Figure 8). Since 1998, tax revenue has increased 39%. In 2001, BC experienced a considerable drop in tax revenue, related to tax cuts following the 2001 election. The growth in tax revenue rebounded and averaged 8% between 2004 and 2007. Tax revenue growth slid to less than 1% in 2008.

FIGURE 8. TOURISM-RELATED TAX REVENUE AND YEAR-OVER-YEAR CHANGE (1998 TO 2008).



Export revenues

The tourism industry generated \$3.6B in export revenues in 2008 (Figure 9).⁴ Export revenues are generated from the sale of tourism products and services to international visitors. Tourism revenues dropped in 2003, rebounded in 2004 and has steadied with annual growth of 2.7% and 3.5% in 2007 and 2008, representing a 3.3% cumulative increase since 2000.

The size of the tourism industry's export revenues was similar to the agriculture and fish products, and mineral products between 2000 and 2008 (Figure 10). While agricultural exports and tourism exports have remained relatively steady, mineral exports rose 60% since 2004 (or up 82% since 2000).

Forest products generated the largest export revenues, but have fallen 33% since 2004 (down 39% since 2000) due to the weakening housing market, low timber prices, softwood lumber duties and the weakening pulp market.⁵ On the other

⁴ Pre-2000 export data for the tourism industry consistent with the current data series were not available at the time of publication

⁵ Ministry of Forests and Range 2009/10-2011/12 Service Plan Update

hand, energy exports have risen 113% since 2004 (up 58% since 2000) as energy demand increased over the last decade.

FIGURE 9. TOURISM EXPORT REVENUES (2000 TO 2008).

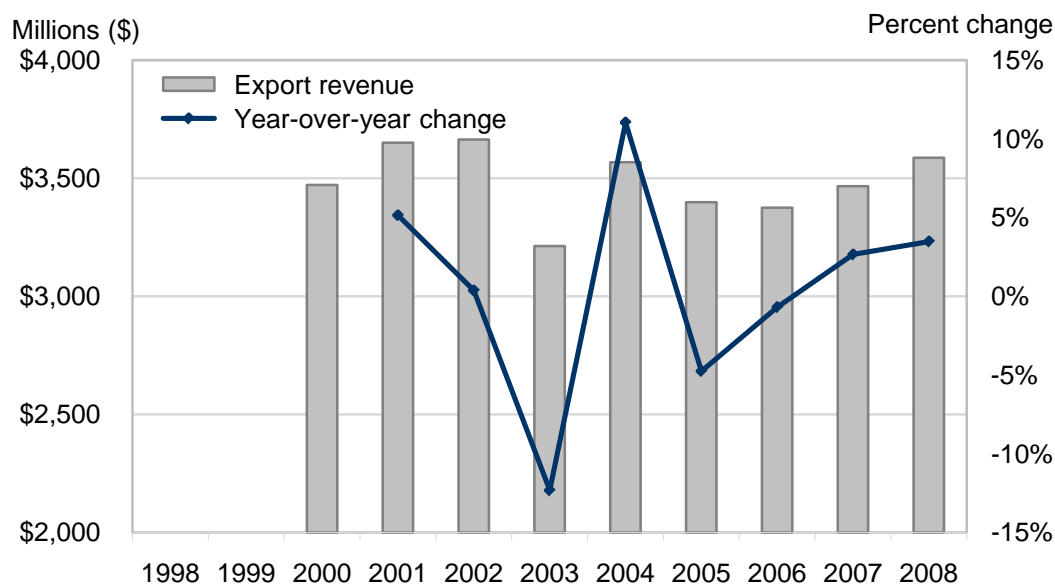
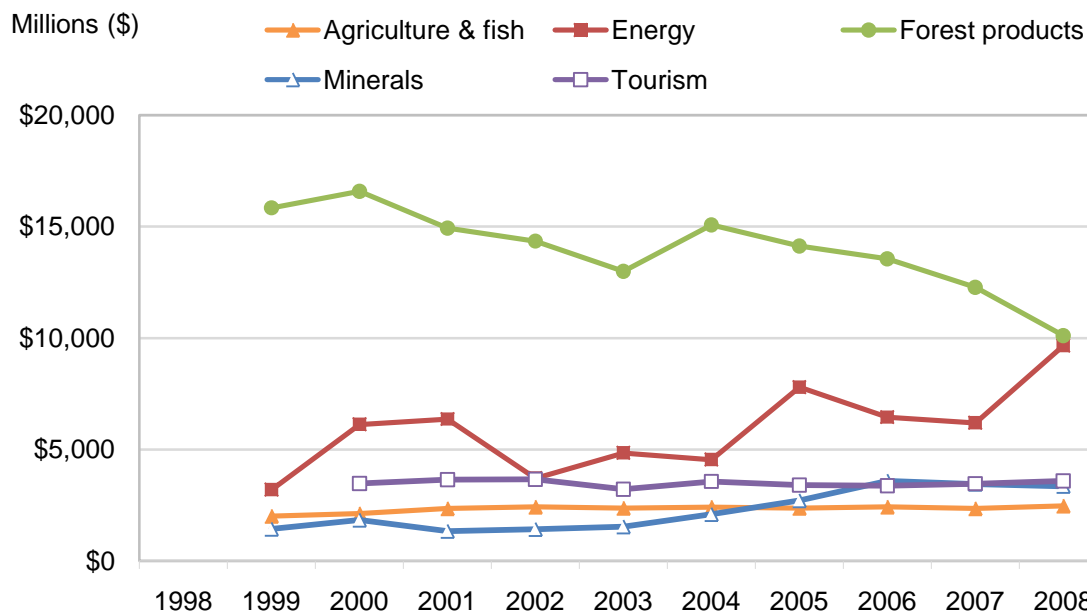


FIGURE 10. EXPORT REVENUES FROM BC'S PRIMARY RESOURCE COMMODITIES (1999 TO 2008).

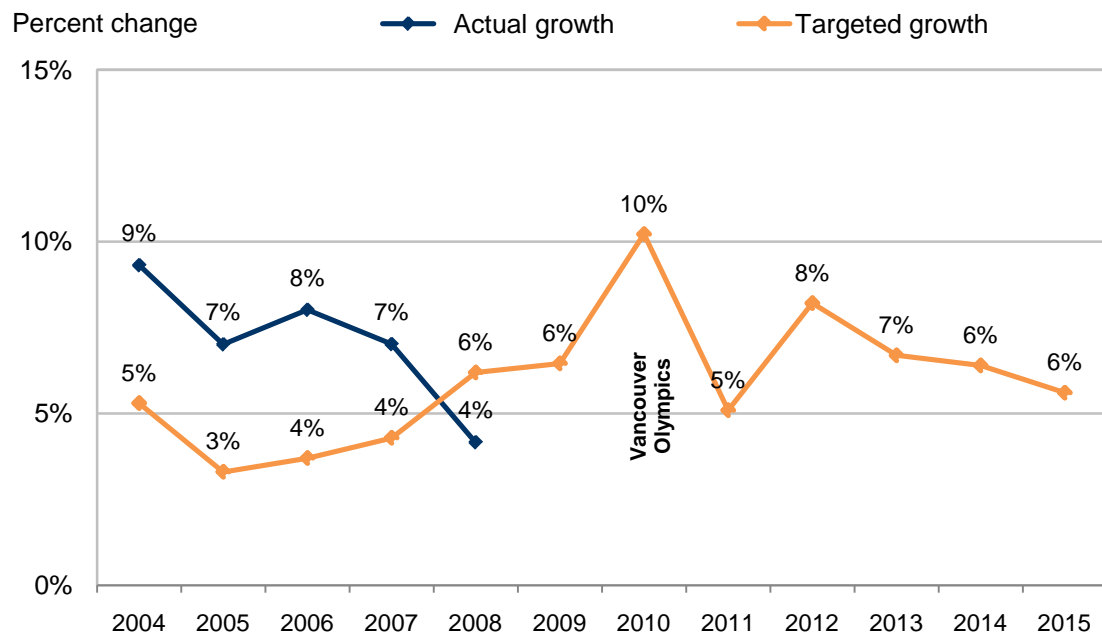


Progress towards doubling tourism revenues

In 2003, Premier Gordon Campbell challenged British Columbia's tourism sector to double provincial tourism revenues to \$19.6B, a target confirmed in November 2006 by Cabinet as a provincial priority.⁶

Figure 11 outlines the projected annual growth rates needed to reach this target, and the actual growth rates between 2004 and 2008. Prior to 2008, total revenue growth rates exceeded the target growth rates established in 2003. The global economic slowdown depressed the 2008 actual growth rate by 2 points (4%) compared to the projected rate (6%).

FIGURE 11. PROGRESS TOWARDS THE TARGET OF DOUBLING TOURISM REVENUES BY 2015.



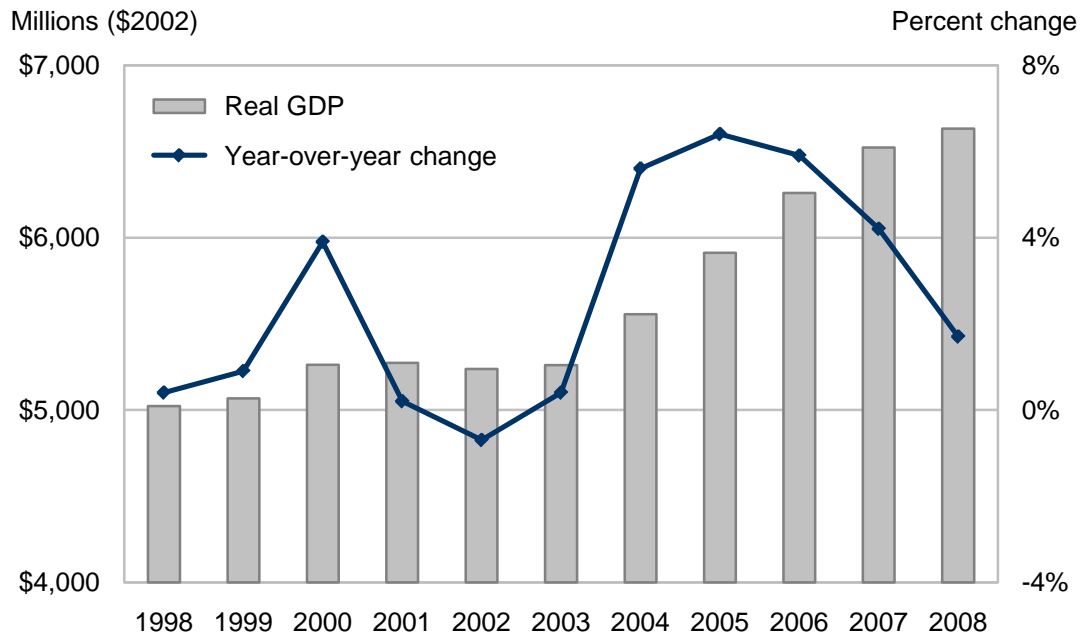
The economic pressures continued in 2009 and may continue into 2010. However, the gains made since 2004 from the higher than projected growth rates and the upward pressure of the Olympics in 2010 may balance out the negative pressures currently on tourism revenues.

⁶ The original target was to double *overnight tourism revenues* from \$8.9B to \$18B between 2003 and 2015. Following the adoption of the new method for estimating tourism revenue, the target was revised to double *total tourism revenues* to \$19.6B by 2015, starting from a revised 2003 base value of \$9.8B.

GROSS DOMESTIC PRODUCT (GDP)

While the tourism industry generated \$13.8B in total revenue, it contributed \$6.6B of added value to the economy in 2008, measured using GDP (in 2002 constant dollars), which represents a 32% increase in GDP since 1998 (Figure 12).

FIGURE 12. TOURISM GROSS DOMESTIC PRODUCT AND YEAR-OVER-YEAR CHANGE (1998 TO 2008).

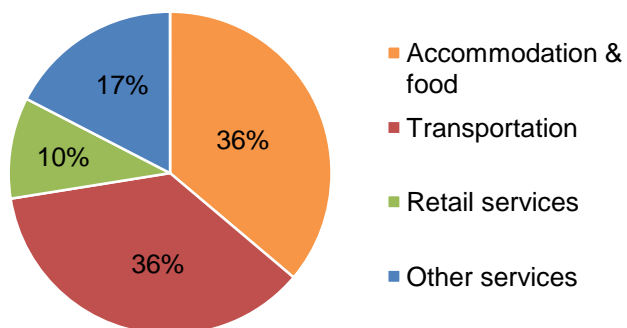


GDP by tourism sectors

In 2008, accommodation and food services and transportation services accounted for over 70% of GDP (based on 2002 constant dollars, Figure 13).

While retail services earned a quarter of revenue, this group accounted for 10% of GDP. By comparison, other tourism services accounted for 17% of GDP, but only 7% of revenue.

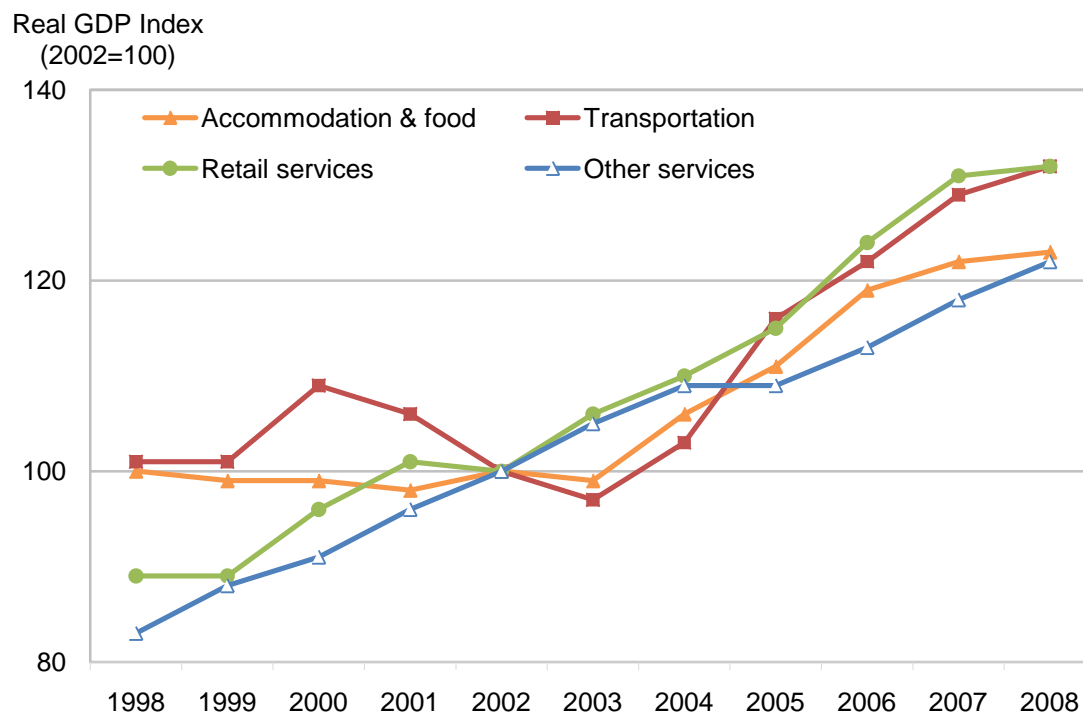
FIGURE 13. SHARE OF 2008 GDP BY TOURISM SECTORS.



GDP in other tourism services showed strong growth over the period, slowing slightly between 2007 and 2008 (Figure 14). All other tourism sectors lost ground in 2003, and have since rebounded. Retail services made the largest gains, with strong growth from 2005 onwards. GDP growth in transportation services increased strongly in the early 2000 as

demand for transportation and fuel prices increased, but growth has slowed starting in 2007, as the economic pressures mounted.

FIGURE 14. COMPARING REAL GDP FOR TOURISM SECTORS (1998 TO 2008).



Industry comparisons

The tourism industry makes a significant contribution to the BC economy compared to the other primary resource industries, which include forestry, agriculture⁷ and mining and oil & gas extraction (Figure 15).

Over the ten-year period, the GDP for the tourism, and mining and oil & gas extraction industries has increased 30% while agriculture and forestry have suffered negative cumulative growth (-8% and -18% respectively).

Tourism is the only primary industry that has maintained steady upward growth in real GDP since 2002 (Figure 16). In 2008, the real GDP of the agriculture, forestry and mining and oil and gas extraction industries were at or below 2002 levels.

⁷ The agriculture industry includes crop and animal production, agricultural support services, and fishing, trapping and hunting.

FIGURE 15. REAL GDP OF BC'S PRIMARY RESOURCE INDUSTRIES (1998 TO 2008).

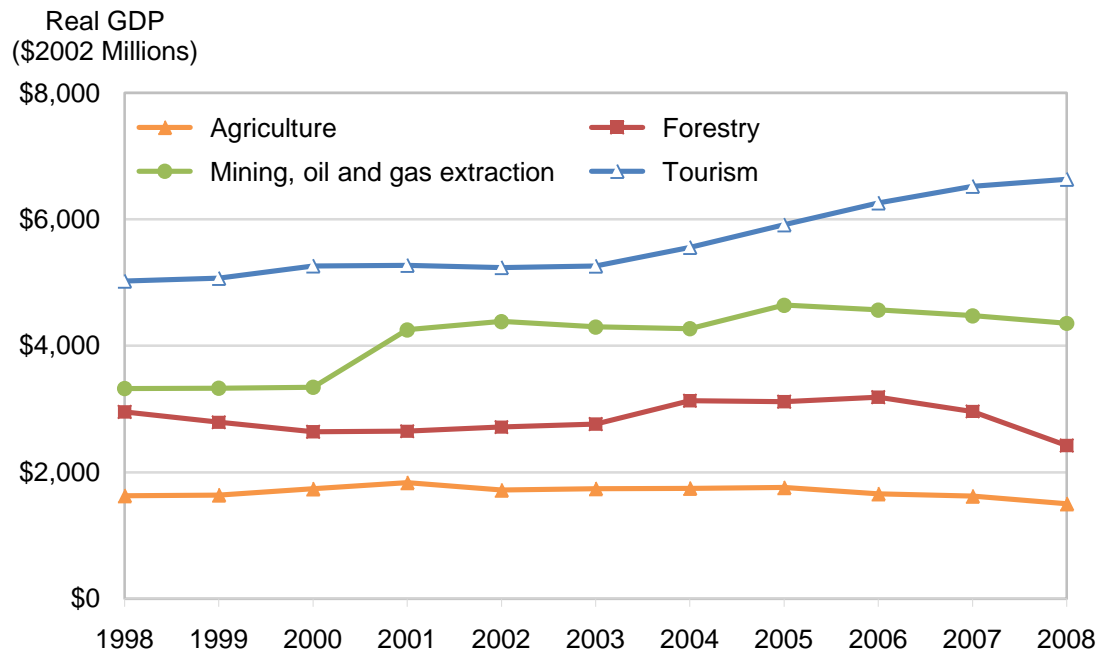
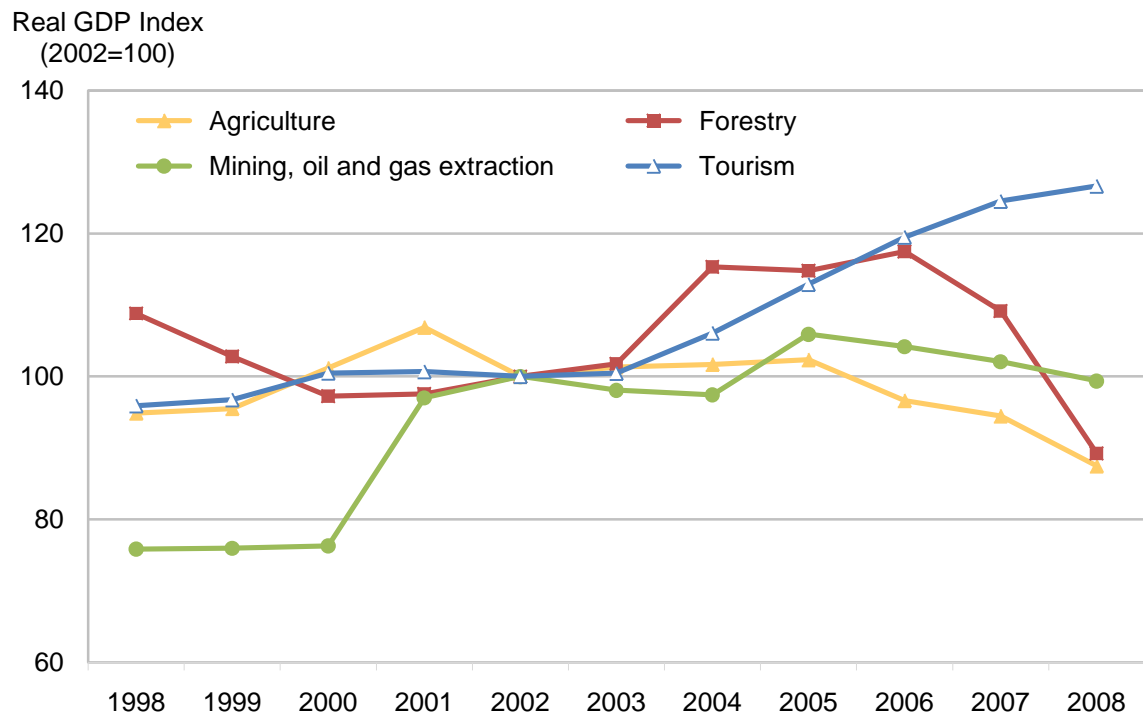


FIGURE 16. COMPARING REAL GDP INDEX BY PRIMARY RESOURCE INDUSTRY (2002 TO 2008).



3. Business and people

In addition to the revenues and gross domestic product that the tourism industry contributes to the BC economy, the tourism industry supports a wide range of small, medium and large business and provides employment across the province.

This chapter summarizes the number of tourism establishments (businesses) in BC and provides statistics on tourism employment. Detailed tables are available in Appendix A.

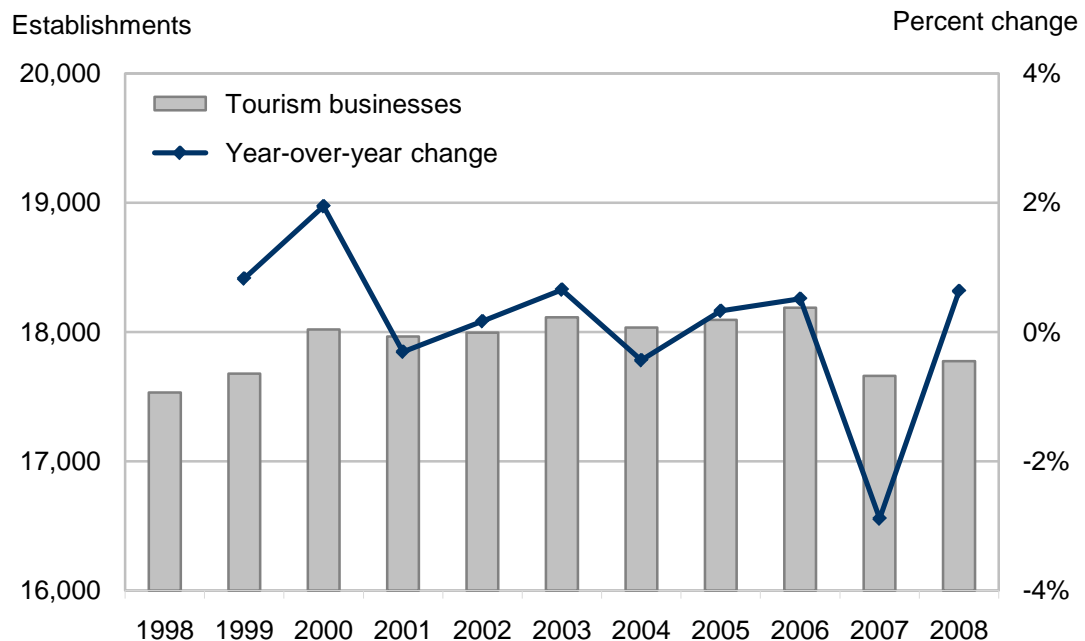
TOURISM BUSINESSES

Total establishments

In 2008, there were 17,774 tourism-related business establishments operating in BC (Figure 17). However, the number of tourism businesses grew only 1% cumulatively since 1998.

Each year, tourism businesses are established and closed. While there was a net increase of 489 businesses between 1998 and 2000, there was a cumulative net increase of only 166 businesses over the following six years with a peak of 18,187 businesses in 2006. In 2007, there was a net decrease of 525 businesses, which was softened by a net increase of 112 businesses in 2008.

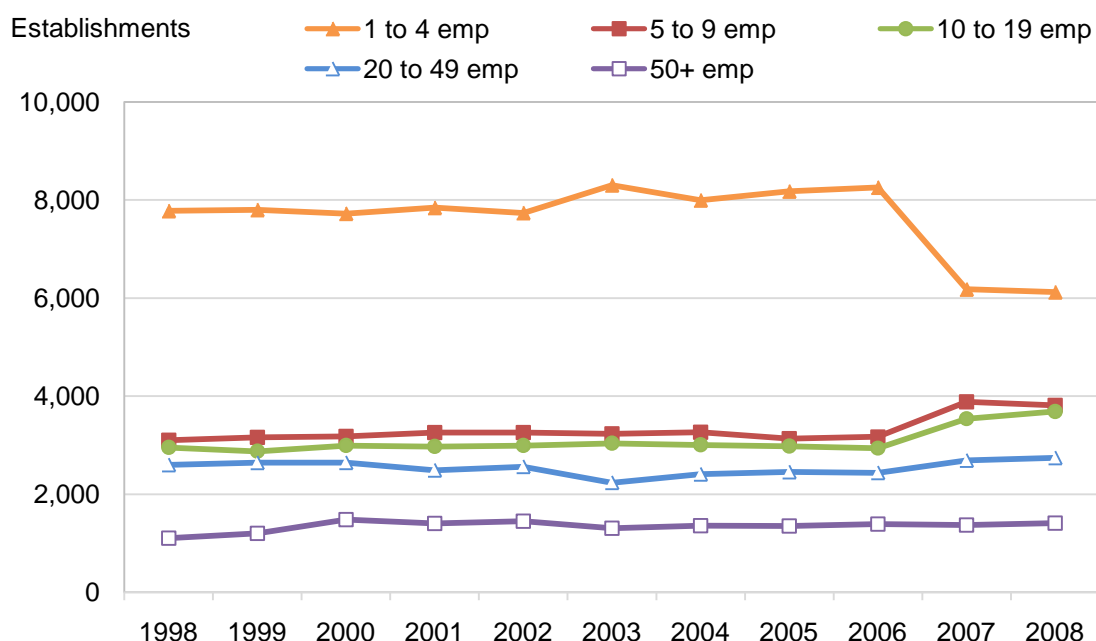
FIGURE 17. COUNT AND YEAR-OVER-YEAR CHANGE OF BC TOURISM BUSINESSES (1998 TO 2008).



The 2007 decrease in the number of tourism establishments occurred primarily among very small businesses (1 to 4 employees), which account for a third of all tourism establishments. The number of very small businesses shrank by 2,077, a 25% decrease over the previous year (Figure 18).

However, the number of slightly larger businesses (5 to 9 and 10 to 19 employees) grew by 1,317, a 22% increase. While some very small businesses undoubtedly closed in 2007, others may have grown larger to meet customer demands, before the impacts of the economic slowdown were felt.

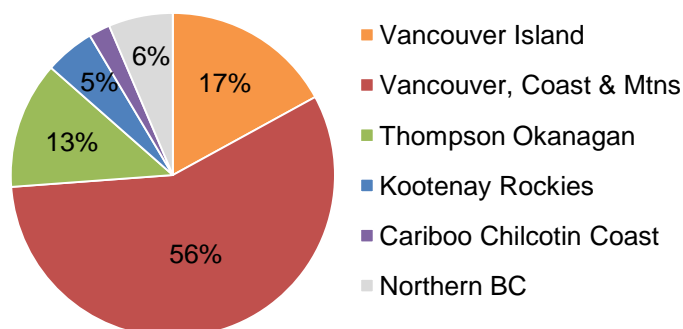
FIGURE 18. COUNT OF TOURISM BUSINESSES BY SIZE (NUMBER OF EMPLOYEES) (1998 TO 2008).



Businesses by region

FIGURE 19. TOURISM BUSINESSES BY REGION (2008).

Over half of BC's tourism-related establishments are located in the Vancouver, Coast & Mountains region, and the three largest regions (Vancouver, Coast & Mountains, Vancouver Island and the Thompson Okanagan account for 86% of tourism businesses (Figure 19).



Since 1998, the number of tourism establishments has increased by 20% in the Vancouver Island region and

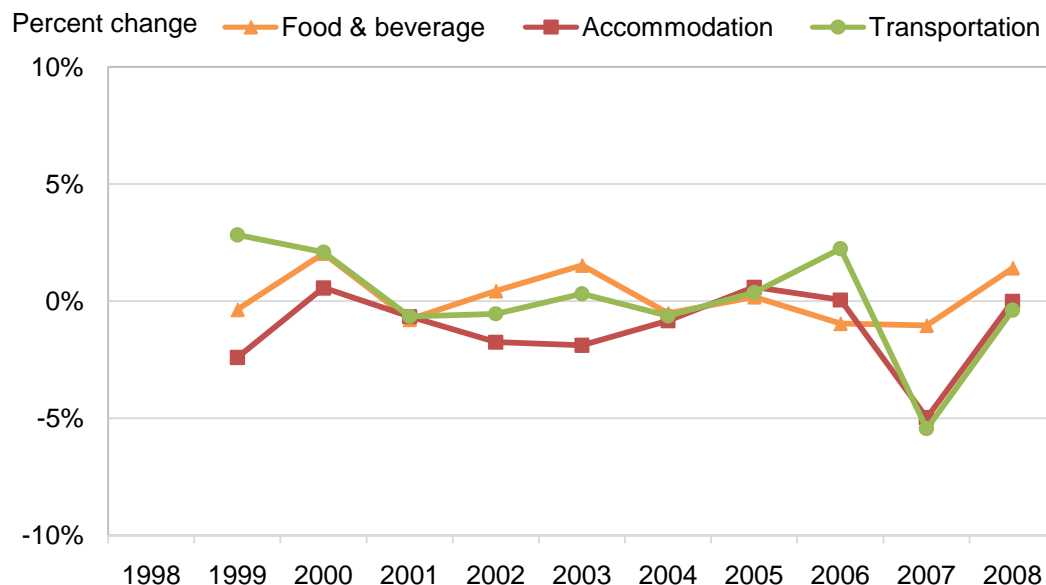
about 10% in Vancouver Coast & Mountains and Thompson Okanagan (7% and 11% respectively). The Cariboo Chilcotin Coast region saw a significant net increase in the number of tourism businesses, up 72% over the ten-year period. Tourism businesses grew 21% in the Kootenay Rockies and 6% in Northern BC.

Businesses by sector

In 2008, the accommodation & food services sector accounted for 65% and the transportation sector accounted for nearly 20% of tourism-related establishments in BC.⁸ Within the accommodation & food services industry group, the split is 83% food & beverage businesses and 17% accommodation businesses.

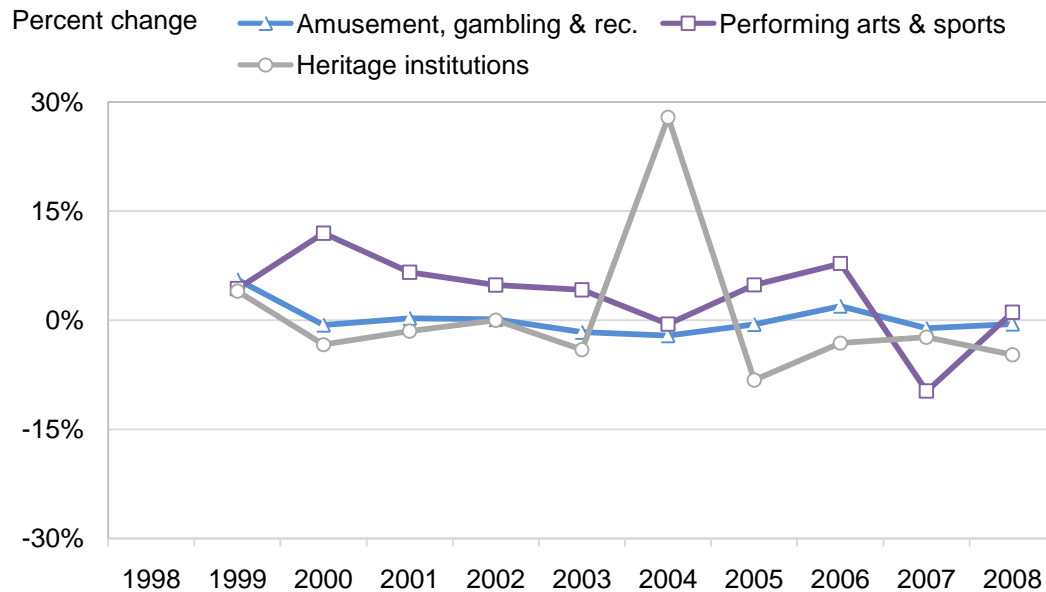
In 2007, all tourism sectors experienced a net decrease in the number of businesses but the impact was less pronounced in the food & beverage sector, amusement, gambling & recreation sector, and heritage institutions (Figure 20). The number of heritage institutions leapt 28% in 2004 most likely due to the provincial government devolving the management of a number of heritage properties (28).

FIGURE 20A. YEAR-OVER-YEAR CHANGE IN TOURISM BUSINESSES FOR THE FOOD & BEVERAGE, ACCOMMODATION AND TRANSPORTATION SECTORS (1998 TO 2008)



⁸ The data on tourism-related establishments is based on the Statistics Canada Business Register. This register uses slightly different coding for sectors, compared to the revenue and GDP data.

FIGURE 20B. YEAR-OVER-YEAR CHANGE IN TOURISM BUSINESSES FOR THE AMUSEMENT, PERFORMING ARTS & SPORTS AND HERITAGE SECTORS(1998 TO 2008)



TOURISM EMPLOYMENT

Direct employment

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

In 2008, the BC tourism industry employed 131,000, a 3% increase over 2007 (Figure 21)⁹. Since 1998, the number of people employed in the tourism industry has grown 28%.

In 1999, tourism employment experienced a slight decline in 1999, and then grew 7% in 2001. The events of September 11th, 2001 interrupted this growth rate but tourism employment held steady in 2002, rather than decreasing.

The accommodation and food services sector accounts for half of all tourism employment in BC. The transportation services sector is the second largest employer with a quarter of tourism employment. Since 1998, the number of employees has grown 30% in accommodation and food services, and 40% in the retail services (Figure 22). Employment in transportation and other services grew by 20% each.

⁹ Tourism employment estimates are developed from Statistics Canada's Survey of Employment, Payroll and Hours (SEPH) and is derived from information on payroll deductions. SEPH may underreport employment as it does not include self-employed workers, who do not make payroll deductions. The Labour Force Survey also collects employment data but the industrial coding estimates are available from the Labour Force Survey, however, the coding by industry is less reliable than SEPH, so the accuracy of industry breakdowns is less precise.

FIGURE 21. EMPLOYMENT IN THE TOURISM INDUSTRY (1998 TO 2008).

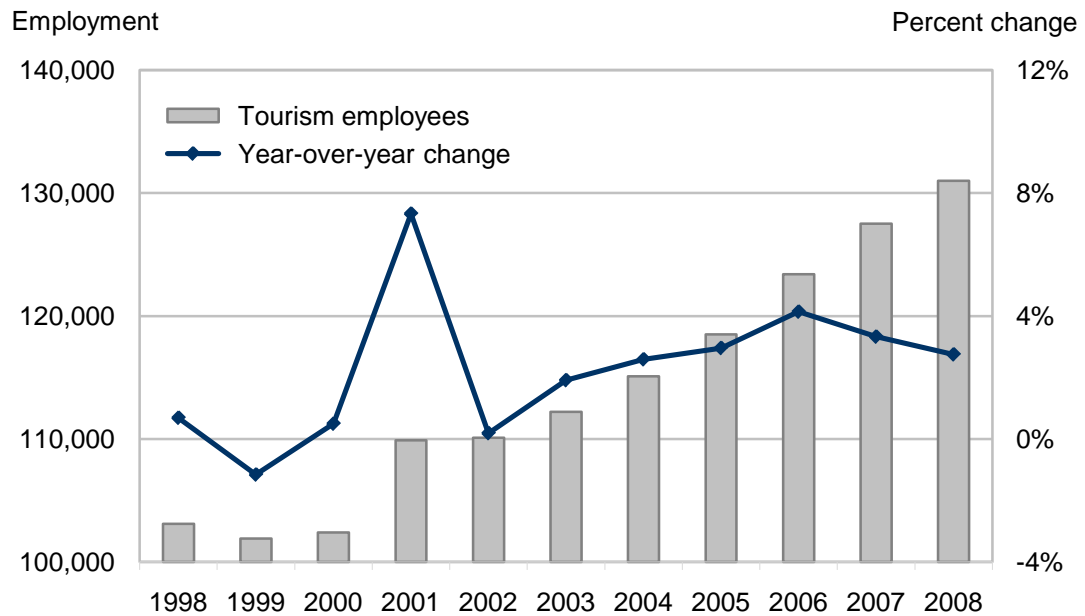
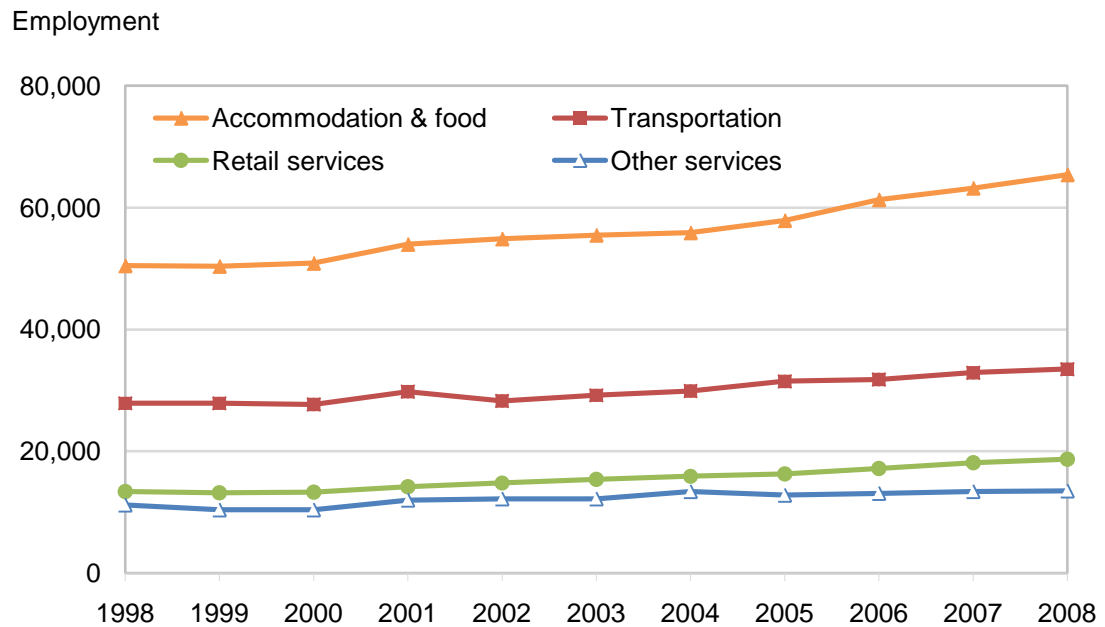


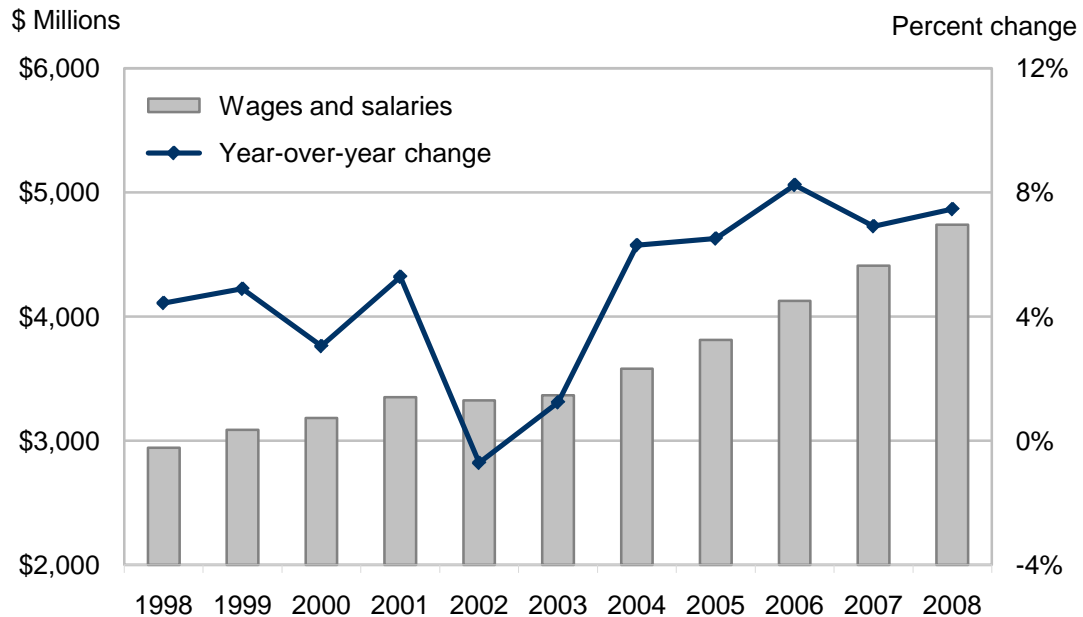
FIGURE 22. TOURISM EMPLOYMENT BY SECTOR (1998 TO 2008).



Wages and salaries

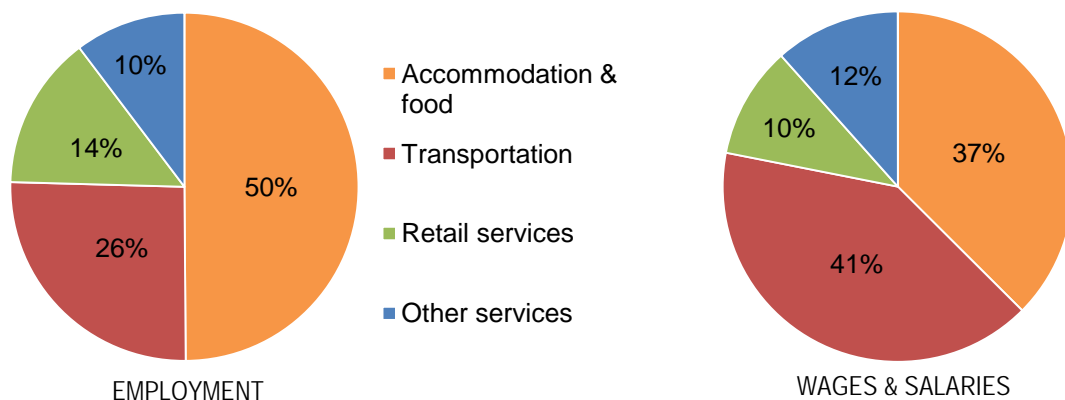
The tourism industry paid \$4.7B in wages and salaries in 2008, an 8% increase over 2007 (Figure 23). While tourism wages and salaries posted a cumulative increase of 61% since 1998, the growth rates in compensation have not been steady. Salaries and wages experienced negative growth after 2001 but rebounded quickly in 2003 and 2004. Since 2005, wages and salaries have averaged 7% annual growth.

FIGURE 23. WAGES AND SALARIES PAID IN THE TOURISM INDUSTRY (1998 TO 2008).



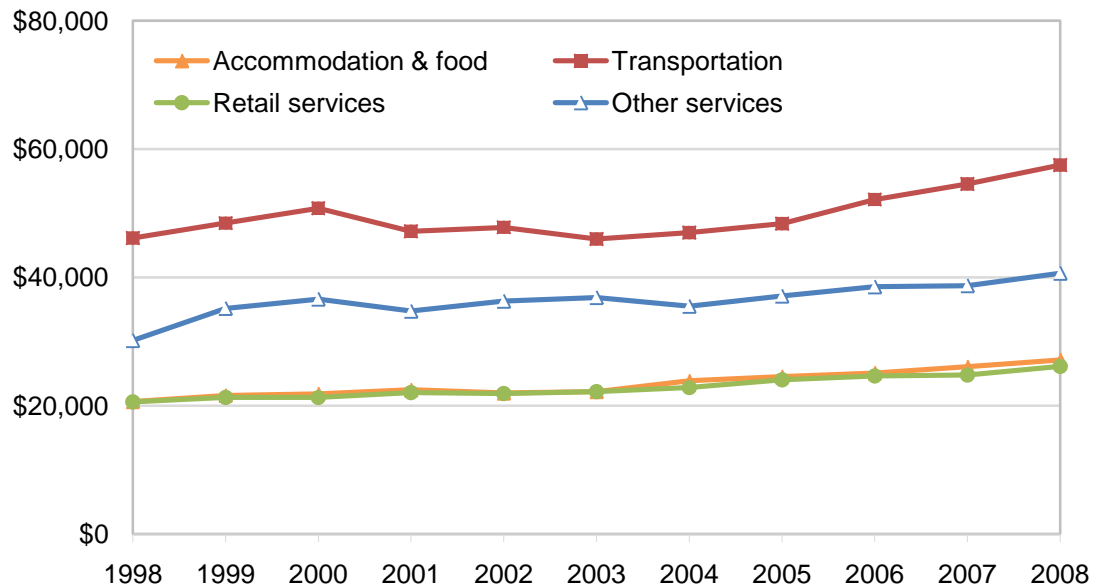
Accommodation and food services account for half of employment but less than 40% of total wages and salaries (Figure 24). Transportation services account for a quarter of employment and over 40% of tourism wages and salaries.

FIGURE 24. SHARE OF TOURISM EMPLOYMENT AND SALARIES BY SECTOR (2008).



While wages and salaries in all tourism sectors have increase 25% to 37% since 1998, the average compensation within transportation services has been more than double the compensation for accommodation and food, and retail services since 1998 (Figure 25). Compensation in transportation services dropped and flattened between 2000 and 2004 but has risen 6% per year on average steadily since 2006. Wages in accommodation and food, and retail services have risen 3% per year since 2006.

FIGURE 25. AVERAGE COMPENSATION PER EMPLOYEE (1998 TO 2008).



4. Market origin

Market origin data is captured through visitor surveys. Tourism British Columbia relies on two surveys conducted by Statistics Canada:

- International Travel Survey (ITS): an exit survey for some international visitors and an entry and mail return survey for others¹⁰
- Travel Survey of Residents of Canada (TSRC): a monthly telephone survey of Canadian households¹¹

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, there are differences arising from differences in survey methodologies (different survey modes, differences in trip or traveller definitions), which may affect visitor volume or expenditure/revenue¹² estimates.

There are also differences in estimates of tourism expenditure/revenue 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 TSRC.
- Trips by Canadians that include a component in BC but have a destination outside Canada are not included in the TSRC.
- Pre-trip expenditures on tourism dedicated durable goods are not included in the TSRC.
- Respondents to telephone surveys, such as the TSRC, may under-report the number of trips and trip expenditures to reduce interview times or may fail to recall trips or trip details.

These factors mean that data presented here on market origin should be interpreted with caution.

This section summarizes visitor volume of overnight travellers to British Columbia (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.

¹⁰ Please visit Statistics Canada's website for more information on the ITS Frontier counts (<http://www.statcan.gc.ca/cgi-bin/imdb/p2SV.pl?Function=getSurvey&SDDS=5005&lang=en&db=imdb&adm=8&dis=2>) and the ITS mail-back questionnaires and air exit surveys (<http://www.statcan.gc.ca/cgi-bin/imdb/p2SV.pl?Function=getSurvey&SDDS=3152&lang=en&db=imdb&adm=8&dis=2>)

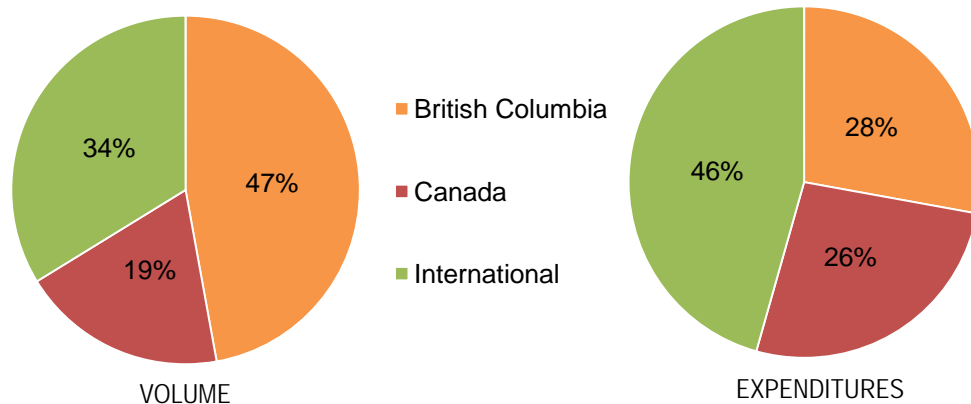
¹¹ Please visit Statistics Canada's website for more information on the TSRC questionnaire (<http://www.statcan.gc.ca/cgi-bin/imdb/p2SV.pl?Function=getSurvey&SDDS=3810&lang=en&db=imdb&adm=8&dis=2>)

¹² Trip expenditures (from the visitor's perspective) is the flip side of tourism revenues (from the BC economy's perspective).

Overall visitor volume

In 2007, there were 14.5 million visitors in BC.¹³ Nearly half of the visitors were BC residents (Figure 26). Domestic visitors from other parts of Canada accounted for almost 20% of overall visitor volume and international visitors accounted for the remaining third. However, international visitors account for nearly half of visitor expenditures, with Canadian and BC residents each accounting for less than 30% of expenditures.

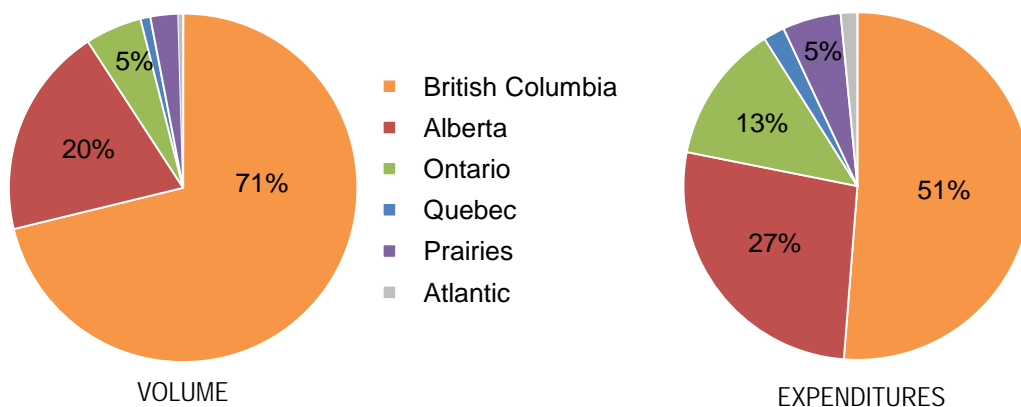
FIGURE 26. VISITOR VOLUME AND EXPENDITURES BY MARKET ORIGIN (2007).



Domestic market

In the domestic market, BC residents made up the largest share of visitor volume (71%) and expenditures in 2007 (51%; Figure 27). Alberta was the second largest domestic market of overnight visitors to BC in 2007. Combined, Alberta and BC represented over 90% of the Canadian visitor volume and 78% of revenues in 2007.

FIGURE 27. SHARE OF DOMESTIC VISITOR VOLUME AND EXPENDITURES (2007).



¹³Source: Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC). 2008 TSRC information is not available for domestic visitors. 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.

International markets

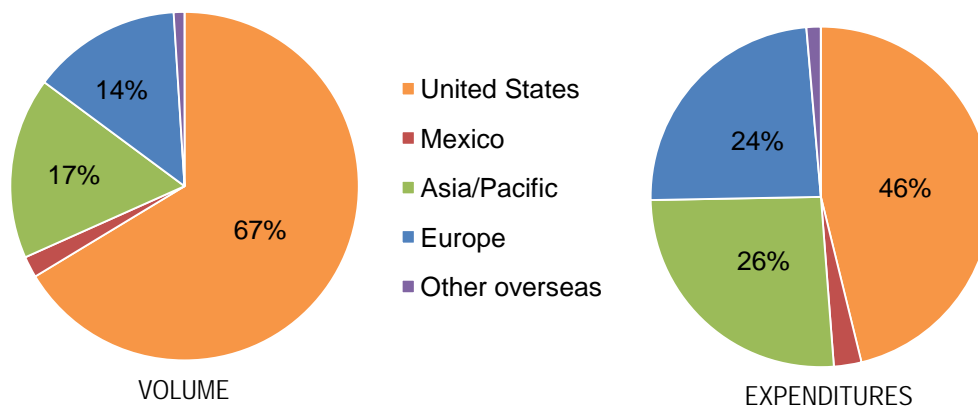
In 2008, 4.5 million international visitors came to BC. The number of international visitors decreased 8% from 2007 and has decreased slightly each year since 2004 (a cumulative decrease of 12% over the five year period).

The United States is the largest overnight international market for BC, making up over two-thirds of international visitor volume and nearly half of expenditures in 2008 (Figure 28). The number of US visitors dropped 11% since 2007 and has decreased each year since 2004 (19% decrease in volume since 2004). US visitor expenditures dropped 1% since 2007 but has decreased 14% since 2004. Within the US, Washington and California are the largest markets, representing nearly half of US visitor volume and 41% of expenditures in 2007.

Mexico has been one of the few international markets with increased visitation each year, growing 28% in volume and 25% in expenditures since 2004. However, this market represents a small share of the overall international market (2% of visitor volume and 3% of expenditures in 2008).

Since 2007, the number of visitors from Asia/Pacific and Europe dropped slightly. However, there has been a cumulative increase in visitor volume from these markets since 2004 (Asia/Pacific 1%, and Europe 8%). Visitor expenditures for these two markets have posted considerable cumulative increases since 2004 (Asia/Pacific 13% and Europe 25%).

FIGURE 28. INTERNATIONAL VISITOR VOLUME AND EXPENDITURES (2008).



While many Asia/Pacific markets saw declines in 2008, several markets have experienced growth in visitation since 2004, such as Australia and New Zealand (when combined represent 4% of the total international market).

The United Kingdom is the largest European market, representing 50% of the European visitor volume and 45% of visitor revenues in 2008. Most major European markets experienced declines during the economic slowdown. French

¹⁴ 2008 ITS information is currently under review and the breakouts by US states are not available.

visitor volume and expenditures have remained positive but represent a small international market (less than 1% of overall international volume in 2008).

Detailed tables of market origin are available in Appendix A.

APPENDIX A

Detailed tables

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TABLE 1. SUMMARY OF KEY ECONOMIC INDICATORS FOR THE TOURISM INDUSTRY.

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total revenue (\$ million)	\$8,529	\$8,592	\$9,339	\$9,582	\$9,720	\$9,799	\$10,712	\$11,463	\$12,382	\$13,251	\$13,802
% change	5.1%	0.7%	8.7%	2.6%	1.4%	0.8%	9.3%	7.0%	8.0%	7.0%	4.2%
Accommodation room revenue	\$1,206	\$1,329	\$1,437	\$1,469	\$1,503	\$1,481	\$1,587	\$1,682	\$1,808	\$1,964	\$1,977
% change	4.2%	10.2%	8.1%	2.2%	2.3%	-1.5%	7.2%	5.9%	7.5%	8.6%	0.7%
Tax revenues	\$675	\$725	\$757	\$692	\$680	\$695	\$757	\$806	\$871	\$932	\$937
% change	4.5%	7.4%	4.4%	-8.6%	-1.7%	2.2%	8.9%	6.5%	8.1%	7.0%	0.5%
Export revenue	.	.	\$3,471	\$3,650	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,587
% change	.	.	.	5.2%	0.4%	-12.3%	11.0%	-4.7%	-0.7%	2.7%	3.5%
Gross Domestic Product	\$5,023	\$5,067	\$5,263	\$5,273	\$5,238	\$5,261	\$5,556	\$5,913	\$6,259	\$6,522	\$6,633
% change	0.4%	0.9%	3.9%	0.2%	-0.7%	0.4%	5.6%	6.4%	5.9%	4.2%	1.7%
Total establishments	17,532	17,677	18,021	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774
% change		0.8%	1.9%	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%
Tourism employment	17,532	17,677	18,021	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774
% change	0.8%	1.9%	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.8%
Wages and salaries	\$2,944	\$3,088	\$3,182	\$3,350	\$3,326	\$3,367	\$3,579	\$3,812	\$4,126	\$4,411	\$4,740
% change	3.7%	6.1%	2.5%	-1.9%	-0.9%	-0.7%	3.6%	3.5%	3.9%	3.5%	4.6%
International visitors (,000)	.	.	5,305	5,307	5,345	4,844	5,149	4,983	4,951	4,911	4,515
% change	.	.	.	0.04%	0.7%	-9.4%	6.3%	-3.2%	-0.6%	-0.8%	-8.1%

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

	Industry groups	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Revenue (\$ millions)	Accommodation & food services	\$3,193	\$3,183	\$3,276	\$3,434	\$3,510	\$3,422	\$3,810	\$4,150	\$4,624	\$4,936	\$4,998
	Transportation services	\$2,843	\$2,852	\$3,087	\$3,031	\$2,967	\$3,004	\$3,212	\$3,509	\$3,721	\$3,911	\$4,200
	Retail services	\$1,886	\$1,918	\$2,326	\$2,437	\$2,487	\$2,568	\$2,751	\$2,920	\$3,132	\$3,442	\$3,595
	Other services	\$607	\$640	\$649	\$680	\$756	\$805	\$940	\$884	\$905	\$961	\$1,010
	Overall	\$8,529	\$8,592	\$9,339	\$9,582	\$9,720	\$9,799	\$10,712	\$11,463	\$12,382	\$13,251	\$13,802
% change	Accommodation & food services	7.1%	-0.3%	2.9%	4.8%	2.2%	-2.5%	11.3%	8.9%	11.4%	6.7%	1.3%
	Transportation services	2.6%	0.3%	8.2%	-1.8%	-2.1%	1.2%	6.9%	9.2%	6.0%	5.1%	7.4%
	Retail services	5.6%	1.7%	21.3%	4.8%	2.1%	3.3%	7.1%	6.1%	7.3%	9.9%	4.4%
	Other services	5.0%	5.4%	1.4%	4.8%	11.2%	6.5%	16.8%	-6.0%	2.4%	6.2%	5.1%
	Overall	5.1%	0.7%	8.7%	2.6%	1.4%	0.8%	9.3%	7.0%	8.0%	7.0%	4.2%

Source: BC Stats

TABLE 3. ACCOMMODATION ROOM REVENUE AND YEAR-OVER-YEAR CHANGE BY TOURISM REGION.

Region		1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Room revenue (\$ million)	Vancouver Island	\$216	\$234	\$239	\$251	\$263	\$267	\$288	\$303	\$318	\$345	\$333
	Vancouver, Coast & Mtns	\$688	\$780	\$857	\$864	\$860	\$820	\$876	\$914	\$979	\$1,050	\$1,062
	Thompson Okanagan	\$138	\$148	\$158	\$164	\$179	\$185	\$201	\$220	\$238	\$267	\$273
	Kootenay Rockies	\$67	\$75	\$82	\$83	\$92	\$91	\$98	\$100	\$113	\$135	\$133
	Cariboo Chilcotin Coast	\$20	\$20	\$21	\$21	\$21	\$21	\$21	\$23	\$24	\$26	\$27
	Northern BC	\$77	\$73	\$80	\$85	\$88	\$96	\$103	\$121	\$136	\$141	\$149
	Overall	\$1,206	\$1,329	\$1,437	\$1,469	\$1,503	\$1,481	\$1,587	\$1,682	\$1,808	\$1,964	\$1,977
% change	Vancouver Island	7.3%	8.5%	2.0%	5.3%	4.4%	1.7%	7.8%	5.4%	4.7%	8.6%	-3.4%
	Vancouver, Coast & Mtns	3.1%	13.3%	9.9%	0.9%	-0.5%	-4.6%	6.7%	4.4%	7.1%	7.3%	1.1%
	Thompson Okanagan	7.0%	7.1%	7.3%	3.9%	8.5%	3.7%	8.6%	9.5%	8.1%	12.3%	2.1%
	Kootenay Rockies	4.3%	11.6%	9.0%	1.6%	10.0%	-0.3%	7.5%	2.3%	12.4%	19.4%	-1.2%
	Cariboo Chilcotin Coast	-3.0%	-1.3%	9.0%	-2.0%	2.5%	-1.8%	1.7%	5.2%	8.1%	5.8%	3.7%
	Northern BC	2.3%	-4.9%	9.0%	6.1%	3.9%	8.5%	7.7%	17.0%	12.4%	3.9%	6.0%
	Overall	4.2%	10.2%	8.1%	2.2%	2.3%	-1.5%	7.2%	5.9%	7.5%	8.6%	0.7%

Source: BC Stats

TABLE 4. TOTAL PROVINCIAL TAX REVENUE GENERATED BY THE TOURISM INDUSTRY (1998 TO 2008).

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Total provincial taxes ^A (\$ million)	\$675	\$725	\$757	\$692	\$680	\$695	\$757	\$806	\$871	\$932	\$937
% change	4.5%	7.4%	4.4%	-8.6%	-1.7%	2.2%	8.9%	6.5%	8.1%	7.0%	0.5%

^A Provincial taxes include income, hotel, gas and other taxes.

Source: BC Stats

TABLE 5. EXPORT REVENUE GENERATED BY THE TOURISM INDUSTRY.

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Tourism export revenue (\$ million)	.	.	\$3,471	\$3,650	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,587
% change	.	.	.	5.2%	0.4%	-12.3%	11.0%	-4.7%	-0.7%	2.7%	3.5%

Tourism export revenue data is not available prior to 2000.

TABLE 6. COMPARING EXPORT REVENUES FOR BC'S PRIMARY COMMODITIES (1999 TO 2008).

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Forest industry	.	\$15,847	\$16,591	\$14,940	\$14,353	\$12,997	\$15,081	\$14,134	\$13,560	\$12,282	\$10,107
<i>Wood products</i>		\$10,193	\$9,652	\$9,374	\$9,284	\$8,239	\$10,062	\$9,485	\$8,776	\$7,164	\$5,408
<i>Pulp and paper products</i>		\$5,654	\$6,939	\$5,566	\$5,069	\$4,758	\$5,019	\$4,649	\$4,784	\$5,118	\$4,699
Agriculture and fish	.	\$2,013	\$2,125	\$2,350	\$2,420	\$2,371	\$2,416	\$2,371	\$2,422	\$2,349	\$2,468
<i>Agriculture and food</i>		\$1,168	\$1,230	\$1,385	\$1,406	\$1,390	\$1,442	\$1,386	\$1,444	\$1,452	\$1,569
<i>Fish products</i>		\$845	\$895	\$965	\$1,014	\$981	\$974	\$985	\$978	\$897	\$899
Metallic mineral products	.	\$1,430	\$1,836	\$1,336	\$1,420	\$1,535	\$2,089	\$2,705	\$3,586	\$3,445	\$3,348
Energy products	.	\$3,195	\$6,130	\$6,366	\$3,713	\$4,847	\$4,549	\$7,801	\$6,455	\$6,201	\$9,671
Tourism industry	.	.	\$3,471	\$3,650	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,587

Source: BC Stats

TABLE 7. PROGRESS TOWARDS TARGET OF DOUBLING TOURISM REVENUE BY 2015.

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Projected growth to achieve target	5.3%	3.3%	3.7%	4.3%	6.2%	6.5%	10.2%	5.1%	8.2%	6.7%	6.4%
Actual revenue growth	9.3%	7.0%	8.0%	7.0%	4.2%						

Source: BC Ministry of Tourism, Culture and the Arts, Tourism British Columbia

TABLE 8. TOURISM GDP USING 2002 DOLLARS BY SECTOR (1998 TO 2008).

	Sectors	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
GDP (\$ millions)	Accommodation & food services	\$1,954	\$1,937	\$1,926	\$1,908	\$1,955	\$1,943	\$2,079	\$2,176	\$2,324	\$2,385	\$2,398
	Transportation services	\$1,842	\$1,853	\$1,988	\$1,950	\$1,831	\$1,785	\$1,889	\$2,127	\$2,238	\$2,354	\$2,409
	Retail services	\$452	\$450	\$489	\$514	\$508	\$540	\$561	\$583	\$628	\$668	\$672
	Other services	\$786	\$835	\$864	\$907	\$945	\$993	\$1,026	\$1,028	\$1,070	\$1,116	\$1,154
	Overall	\$5,023	\$5,067	\$5,263	\$5,273	\$5,238	\$5,261	\$5,556	\$5,913	\$6,259	\$6,522	\$6,633
% change	Accommodation & food services	-1.2%	-0.9%	-0.6%	-0.9%	2.5%	-0.6%	7.0%	4.7%	6.8%	2.6%	0.5%
	Transportation services	0.1%	0.6%	7.3%	-1.9%	-6.1%	-2.5%	5.8%	12.6%	5.2%	5.2%	2.3%
	Retail services	6.4%	-0.4%	8.7%	5.1%	-1.2%	6.3%	3.9%	3.9%	7.7%	6.4%	0.6%
	Other services	0.1%	6.2%	3.5%	5.0%	4.2%	5.1%	3.3%	0.2%	4.1%	4.3%	3.4%
	Overall	0.4%	0.9%	3.9%	0.2%	-0.7%	0.4%	5.6%	6.4%	5.9%	4.2%	1.7%

Source: BC Stats

TABLE 9. COMPARING GDP OF TOURISM SECTORS USING AN INDEX WHERE 2002 = 100.

Sectors	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Accommodation & food services	100	99	99	98	100	99	106	111	119	122	123
Transportation services	101	101	109	106	100	97	103	116	122	129	132
Retail services	89	89	96	101	100	106	110	115	124	131	132
Other services	83	88	91	96	100	105	109	109	113	118	122
Tourism industry	96	97	100	101	100	100	106	113	119	125	127

Source: BC Stats

TABLE 10. COMPARING GDP OF BC PRIMARY RESOURCE INDUSTRIES (1998 TO 2008).

	Industries	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
GDP (\$ millions)	Agriculture	\$1,628	\$1,639	\$1,736	\$1,834	\$1,716	\$1,739	\$1,745	\$1,756	\$1,658	\$1,621	\$1,501
	Forestry	\$2,952	\$2,789	\$2,638	\$2,647	\$2,713	\$2,761	\$3,129	\$3,114	\$3,187	\$2,961	\$2,421
	Mining, oil and gas extraction	\$3,324	\$3,329	\$3,344	\$4,252	\$4,383	\$4,298	\$4,270	\$4,642	\$4,566	\$4,474	\$4,355
	Tourism	\$5,023	\$5,067	\$5,263	\$5,273	\$5,238	\$5,261	\$5,556	\$5,913	\$6,259	\$6,522	\$6,633
Index (2002 = 100)	Agriculture	95	96	101	107	100	101	102	102	97	94	87
	Forestry	109	103	97	98	100	102	115	115	117	109	89
	Mining, oil and gas extraction	76	76	76	97	100	98	97	106	104	102	99
	Tourism	96	97	100	101	100	100	106	113	119	125	127

TABLE 11. TOURISM ESTABLISHMENTS BY BUSINESS SIZE (1998 T 2008).

	Business size	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Establishments	1 to 4 employees	7,777	7,799	7,723	7,842	7,737	8,302	7,995	8,177	8,256	6,179	6,121
	5 to 9 employees	3,101	3,160	3,182	3,259	3,260	3,234	3,266	3,133	3,170	3,886	3,816
	10 to 19 employees	2,952	2,874	2,991	2,974	2,991	3,038	3,007	2,980	2,937	3,538	3,687
	20 to 49 employees	2,599	2,644	2,645	2,490	2,563	2,235	2,408	2,454	2,438	2,691	2,744
	50 to 199 employees	1,002	1,087	1,349	1,270	1,316	1,178	1,221	1,204	1,220	1,230	1,248
	200 or more emp.	101	113	131	131	129	127	138	146	166	138	158
	Overall	17,532	17,677	18,021	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774
% change	1 to 4 employees		0.3%	-1.0%	1.5%	-1.3%	7.3%	-3.7%	2.3%	1.0%	-25.2%	-0.9%
	5 to 9 employees		1.9%	0.7%	2.4%	0.0%	-0.8%	1.0%	-4.1%	1.2%	22.6%	-1.8%
	10 to 19 employees		-2.6%	4.1%	-0.6%	0.6%	1.6%	-1.0%	-0.9%	-1.4%	20.5%	4.2%
	20 to 49 employees		1.7%	0.0%	-5.9%	2.9%	-12.8%	7.7%	1.9%	-0.7%	10.4%	2.0%
	50 to 199 employees		8.5%	24.1%	-5.9%	3.6%	-10.5%	3.7%	-1.4%	1.3%	0.8%	1.5%
	200 or more emp.		11.9%	15.9%	0.0%	-1.5%	-1.6%	8.7%	5.8%	13.7%	-16.9%	14.5%
	Overall		0.8%	1.9%	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%

Source: BC Stats

TABLE 12. TOURISM ESTABLISHMENTS BY INDUSTRY SECTOR (1998 TO 2008).

	Business size	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Establishments	Food & beverage	9,369	9,335	9,525	9,450	9,491	9,636	9,586	9,603	9,511	9,412	9,545
	Accommodation	2,162	2,110	2,122	2,108	2,071	2,032	2,015	2,027	2,028	1,927	1,927
	Transportation	3,358	3,453	3,525	3,502	3,483	3,494	3,472	3,485	3,563	3,369	3,356
	Amusement, gambling & recreation	1,732	1,829	1,817	1,822	1,824	1,794	1,756	1,746	1,780	1,760	1,751
	Performing arts & sports	711	742	831	886	929	968	963	1,010	1,089	983	994
	Heritage institutions	200	208	201	198	198	190	243	223	216	211	201
	Overall	17,532	17,677	18,021	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774
% change	Food & beverage		-0.4%	2.0%	-0.8%	0.4%	1.5%	-0.5%	0.2%	-1.0%	-1.0%	1.4%
	Accommodation		-2.4%	0.6%	-0.7%	-1.8%	-1.9%	-0.8%	0.6%	0.0%	-5.0%	0.0%
	Transportation		2.8%	2.1%	-0.7%	-0.5%	0.3%	-0.6%	0.4%	2.2%	-5.4%	-0.4%
	Amusement, gambling & recreation		5.6%	-0.7%	0.3%	0.1%	-1.6%	-2.1%	-0.6%	1.9%	-1.1%	-0.5%
	Performing arts & sports		4.4%	12.0%	6.6%	4.9%	4.2%	-0.5%	4.9%	7.8%	-9.7%	1.1%
	Heritage institutions		4.0%	-3.4%	-1.5%	0.0%	-4.0%	27.9%	-8.2%	-3.1%	-2.3%	-4.7%
	Overall		0.8%	1.9%	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%

Source: BC Stats

TABLE 13. TOURISM ESTABLISHMENTS BY REGION (1998 TO 2008).

Region	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Vancouver Island	2,494	2,485	2,511	2,460	2,421	2,991	2,994	2,994	3,014	2,933	2,998
Vancouver, Coast & Mtns	9,377	9,468	9,743	9,767	9,847	10,190	10,169	10,323	10,346	9,964	10,014
Thompson Okanagan	2,018	2,028	2,048	2,046	2,037	2,343	2,329	2,302	2,339	2,168	2,231
Kootenay Rockies	723	715	755	744	733	940	903	884	882	854	873
Cariboo Chilcotin Coast	219	217	219	208	197	368	369	355	365	360	376
Northern BC	1,071	1,086	1,050	1,033	1,020	1,259	1,234	1,202	1,201	1,144	1,132
<i>Standard geographic coding not available</i>	1,630	1,678	1,695	1,708	1,741	23	37	34	40	239	150
Total establishments	17,532	17,677	18,021	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774
% change		0.8%	1.9%	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%

Note: The year-over-year change by region is not shown. The number of businesses without geocoding decreased dramatically in 2003, creating spurious growth in number of establishments by region compared to 2002.

Source: BC Stats

TABLE 14. TOURISM EMPLOYMENT BY SECTOR (1998 TO 2008).

	Sectors	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Employment	Accommodation & food services	50,500	50,400	50,900	54,000	54,900	55,500	55,900	57,900	61,300	63,200	65,400
	Transportation services	27,900	27,900	27,700	29,800	28,300	29,200	29,900	31,500	31,800	32,900	33,500
	Retail services	13,400	13,200	13,300	14,200	14,800	15,400	15,900	16,300	17,200	18,100	18,700
	Other services	11,200	10,400	10,400	12,000	12,200	12,200	13,400	12,800	13,100	13,400	13,500
	Overall	103,100	101,900	102,400	109,900	110,100	112,200	115,100	118,500	123,400	127,500	131,000
% change	Accommodation & food services	-0.6%	-0.2%	1.0%	6.1%	1.7%	1.1%	0.7%	3.6%	5.9%	3.1%	3.5%
	Transportation services	5.7%	0.0%	-0.7%	7.6%	-5.0%	3.2%	2.4%	5.4%	1.0%	3.5%	1.8%
	Retail services	0.0%	-1.5%	0.8%	6.8%	4.2%	4.1%	3.2%	2.5%	5.5%	5.2%	3.3%
	Other services	-5.1%	-7.1%	0.0%	15.4%	1.7%	0.0%	9.8%	-4.5%	2.3%	2.3%	0.7%
	Overall	0.7%	-1.2%	0.5%	7.3%	0.2%	1.9%	2.6%	3.0%	4.1%	3.3%	2.7%

Source: BC Stats

TABLE 15. TOURISM WAGES AND SALARIES BY SECTOR (1998 TO 2008).

	Sectors	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Wages & salaries (\$millions)	Accommodation & food services	\$1,042	\$1,089	\$1,112	\$1,213	\$1,206	\$1,232	\$1,334	\$1,420	\$1,539	\$1,648	\$1,775
	Transportation services	\$1,288	\$1,352	\$1,406	\$1,406	\$1,353	\$1,343	\$1,405	\$1,524	\$1,658	\$1,795	\$1,926
	Retail services	\$276	\$281	\$283	\$313	\$324	\$342	\$363	\$392	\$424	\$449	\$489
	Other services	\$338	\$366	\$381	\$417	\$443	\$450	\$476	\$475	\$505	\$519	\$549
	Overall	\$2,944	\$3,088	\$3,182	\$3,350	\$3,326	\$3,367	\$3,579	\$3,812	\$4,126	\$4,411	\$4,740
% change	Accommodation & food services	-0.9%	4.7%	1.1%	2.8%	-2.2%	1.1%	7.5%	2.8%	2.4%	3.9%	4.1%
	Transportation services	1.6%	5.0%	4.7%	-7.0%	1.3%	-3.8%	2.2%	3.0%	7.8%	4.6%	5.4%
	Retail services	4.9%	3.4%	0.0%	3.6%	-0.7%	1.4%	2.8%	5.3%	2.5%	0.6%	5.4%
	Other services	19.1%	16.6%	4.1%	-5.1%	4.5%	1.6%	-3.7%	4.5%	3.9%	0.5%	5.0%
	Overall	3.7%	6.1%	2.5%	-1.9%	-0.9%	-0.7%	3.6%	3.5%	3.9%	3.5%	4.6%

Source: BC Stats

TABLE 16. INTERNATIONAL VISITOR VOLUME (2004 TO 2008).

Market	Volume (thousands)					% change				
	2004	2005	2006	2007	2008	04-05	05-06	06-07	07-08	04-08
United States	3,711	3,536	3,518	3,394	3,020	-5%	-1%	-4%	-11%	-19%
Washington	1,393	1,332	1,257	1,201	.	-4%	-6%	-4%		
California	530	466	488	474	.	-12%	5%	-3%		
Oregon	212	202	209	188	.	-5%	3%	-10%		
Arizona	69	86	75	78	.	25%	-13%	4%		
Florida	108	104	93	91	.	-4%	-11%	-2%		
Texas	106	123	136	127	.	16%	11%	-7%		
Mexico	57	59	62	69	73	4%	5%	11%	6%	28%
Asia/Pacific	750	757	744	765	760	1%	-2%	3%	-1%	1%
Japan	200	204	183	172	142	2%	-10%	-6%	-17%	-29%
Taiwan	98	91	88	75	55	-7%	-3%	-15%	-27%	-44%
Hong Kong	66	62	58	63	75	-6%	-6%	9%	19%	14%
Australia	107	113	119	144	161	6%	5%	21%	12%	50%
South Korea	104	107	120	110	102	3%	12%	-8%	-7%	-2%
China	68	65	65	69	75	-4%	0%	6%	9%	10%
New Zealand	18	21	23	25	32	17%	10%	9%	28%	78%
India	10	8	9	22	24	-20%	13%	144%	9%	140%
Europe	580	595	576	635	626	3%	-3%	10%	-1%	8%
United Kingdom	288	298	289	324	310	3%	-3%	12%	-4%	8%
Germany	116	111	104	101	100	-4%	-6%	-3%	-1%	-14%
Netherlands	45	43	45	48	45	-4%	5%	7%	-6%	0%
France	24	17	19	23	28	-29%	12%	21%	22%	17%
Other overseas	32	35	51	48	35	9%	46%	-6%	-27%	9%
TOTAL INTERNATIONAL	5,131	4,983	4,951	4,911	4,515	-3%	-1%	-1%	-8%	-12%

TABLE 17. INTERNATIONAL VISITOR EXPENDITURES (2004 TO 2008).

Market	Expenditures (\$ millions)					% change				
	2004	2005	2006	2007	2008	04-05	05-06	06-07	07-08	04-08
United States	\$1,925	\$1,722	\$1,727	\$1,671	\$1,654	-11%	0%	-3%	-1%	-14%
Washington	\$427	\$402	\$371	\$369	\$0	-6%	-8%	-1%		
California	\$364	\$289	\$329	\$323	\$0	-21%	14%	-2%		
Oregon	\$89	\$90	\$88	\$94	\$0	1%	-2%	7%		
Arizona	\$39	\$60	\$49	\$47	\$0	54%	-18%	-4%		
Florida	\$82	\$72	\$54	\$46	\$0	-12%	-25%	-15%		
Texas	\$82	\$88	\$92	\$80	\$0	7%	5%	-13%		
Mexico	\$75	\$74	\$79	\$83	\$94	-1%	7%	5%	13%	25%
Asia/Pacific	\$825	\$815	\$824	\$844	\$929	-1%	1%	2%	10%	13%
Japan	\$217	\$236	\$194	\$164	\$148	9%	-18%	-15%	-10%	-32%
Taiwan	\$87	\$75	\$75	\$71	\$57	-14%	0%	-5%	-20%	-34%
Hong Kong	\$74	\$68	\$53	\$58	\$77	-8%	-22%	9%	33%	4%
Australia	\$125	\$128	\$144	\$177	\$213	2%	13%	23%	20%	70%
South Korea	\$120	\$124	\$162	\$138	\$138	3%	31%	-15%	0%	15%
China	\$95	\$68	\$75	\$101	\$120	-28%	10%	35%	19%	26%
New Zealand	\$18	\$10	\$19	\$22	\$34	-44%	90%	16%	55%	89%
India	\$3	\$2	\$3	\$11	\$17	-33%	50%	267%	55%	467%
Europe	\$685	\$744	\$687	\$808	\$857	9%	-8%	18%	6%	25%
United Kingdom	\$343	\$384	\$388	\$392	\$385	12%	1%	1%	-2%	12%
Germany	\$124	\$143	\$126	\$113	\$120	15%	-12%	-10%	6%	-3%
Netherlands	\$52	\$42	\$50	\$54	\$53	-19%	19%	8%	-2%	2%
France	\$22	\$22	\$26	\$37	\$59	0%	18%	42%	59%	168%
Other overseas	\$58	\$43	\$60	\$59	\$49	-26%	40%	-2%	-17%	-16%
TOTAL INTERNATIONAL	\$3,568	\$3,399	\$3,376	\$3,466	\$3,587	-5%	-1%	3%	3%	1%

TABLE 18. DOMESTIC CANADIAN VISITOR VOLUME AND EXPENDITURES (2007).

Region	Visitor volume	Revenue (\$million)
British Columbia	6,859	\$2,117
Alberta	1,890	\$1,111
Ontario	506	\$533
Quebec	88	\$82
Prairies	248	\$224
Atlantic	43	\$64
Total	9,635	\$4,131