

A vertical photograph of a person rappelling down a dark, moss-covered rock face. The person is positioned in the center-left of the frame, with a rope extending upwards. Below the rock face, a small waterfall flows into a pool of water. The scene is dimly lit, with light filtering through the trees at the top of the frame, creating a dramatic and adventurous atmosphere.

THE VALUE OF TOURISM IN BRITISH COLUMBIA

Trends from 2003-2013
February 2015

Destination
British Columbia™

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Cover photo: Box Canyon Creek near Squamish © Jordan Manley.

1. Overview

The tourism industry in British Columbia has demonstrated strong growth since 2003, despite multiple external shocks such as 2003 SARS, the 2009 H1N1 virus, the 2011 earthquake and tsunami in Japan, and the global economic crisis. These setbacks have been mitigated by the positive impacts stemming from the 2010 Olympic and Paralympic Winter Games in Vancouver and Whistler, and the successful 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 2003 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 2013.

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

Key highlights:

- In 2013, the tourism industry generated \$13.9 billion in revenue, a 3.6% increase from 2012 and a 44.3% increase over 2003.
 - In 2012¹, \$1.5 billion of accommodation room revenue was earned in communities with the Municipal Regional District Tax (MRDT)², an increase of 1.6% from 2011.
 - The tourism industry contributed \$980 million in provincial taxes, a decrease of 14.3% from 2012 and an increase of 38.0% from 2003³.
 - In 2012⁴, \$3.2 billion in export revenue was generated, a slight 0.2% increase from 2011 and a decrease of 12.6% since 2002.



¹ 2013 accommodation room revenue data is not yet available; an updated version of this report will be published when final data is available.

² The MRDT is collected only in certain municipalities in British Columbia, room revenue data will only be provided for those areas that collected MRDT in 2010 and 2011 to allow year-over-year comparisons. Total 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.

³ The decrease in 2013 provincial taxes was due to British Columbia's transition from the Harmonized Sales Tax (HST) to the Provincial Sales Tax (PST) on April 1, 2013.

⁴ 2013 tourism export revenue data is not yet available; an updated version of this report will be published when final data is available.

- Tourism generated a direct contribution to British Columbia's gross domestic product (GDP) of \$7.3 billion (2007 constant dollars), an increase of 2.1% over 2012 and a 7.2% increase from 2007.⁵



- In 2013, there were 19,254 tourism-related businesses in operation in British Columbia. The number of establishments is up 3.9% from 2012 and 6.3% from 2003.

- The tourism industry employed 132,200 people in 2013, an increase of 3.0% over 2012 and up 17.6% over 2003.



- In 2013, total tourism wages and salaries were \$4.5 billion, up 3.8% from 2012 and an increase of 34.4% from 2003. Average compensation in the tourism industry is just over \$34,000.

- In 2013, there were 14.7 million overnight domestic visitors (i.e., from Canada) to British Columbia.⁶ More than 10.7 million overnight visitors (73.2%) were British Columbia residents. The number of overnight visitors to British Columbia from Canada (including British Columbia residents) increased by 7.8% from 2012.



- In 2012⁷, there were 4.3 million overnight international visitors (i.e., from other countries) to British Columbia, a slight increase of 0.5% from 2011. Over two-thirds (68.7%, nearly 3 million) of all international overnight visitors were from the United States.

- Overnight domestic visitor expenditures totalled \$5.7 billion in 2013, an increase of 10.4% since 2012. Of these travellers, British Columbia resident visitors contributed the largest portion of expenditures (55.3%, \$3.1 billion), a slight decrease of 0.3% from 2012.

- In 2012⁷, overnight international visitor expenditures increased slightly (0.2%) from 2011 to \$3.2 billion. While United States visitors were the source of the largest share of international expenditures (46.7%), they spent less per visit than visitors from overseas.



⁵ Currently, 2007 constant dollars GDP is only available back to 2007 (not 2003).

⁶ 2013 overnight domestic visitor data is preliminary and is subject to revisions; an updated version of this report will be published when final data is available.

⁷ 2013 international visitor volume and expenditure data is not yet available; an updated version of this report will be published when final data is available.

2. Contributions to the economy

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

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

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

In the past, British Columbia's estimates of tourism revenue were based on spending reported by visitors through surveys – a demand-side approach. Many tourism and statistical agencies have recognized the challenges of relying on visitor surveys to estimate tourism revenue and have adopted a supply-side approach to estimating tourism revenue by developing tourism satellite accounts (TSA)⁸. Statistics Canada and the Canadian Tourism Commission have been leaders in developing a national TSA, which is the source of estimates of tourism revenue for Canada as a whole.

In 2009, the British Columbia provincial statistical agency (BC Stats) adopted a supply-side approach for estimating tourism industry revenues for British Columbia. The total revenue for each tourism-related industry is calculated directly from annual and monthly data collected from businesses. Then, a specific tourism proportion is applied to the revenue for each tourism-related industry to determine the total revenue due to the tourism industry. This approach is similar to the methodology that was already in place for estimating tourism GDP. BC Stats has developed tourism revenue estimates back to 1998.

This section summarizes total tourism revenues and the tourism industry's GDP between 2003 and 2013. The section also includes a discussion of accommodation room revenue (2012)⁹, tax revenues, and export revenues (2002-2012)¹⁰. Detailed tables are available in Appendix A; Tables 1 through 6 are specific to the information covered in this section.

⁸ A TSA is a system of measuring the impact of tourism on the economy; it is a framework that accounts for the impacts across all industries which, in turn, reveals the total direct impact on the economy.

⁹ 2013 accommodation room revenue data is not yet available; an updated version of this report will be published when final data is available.

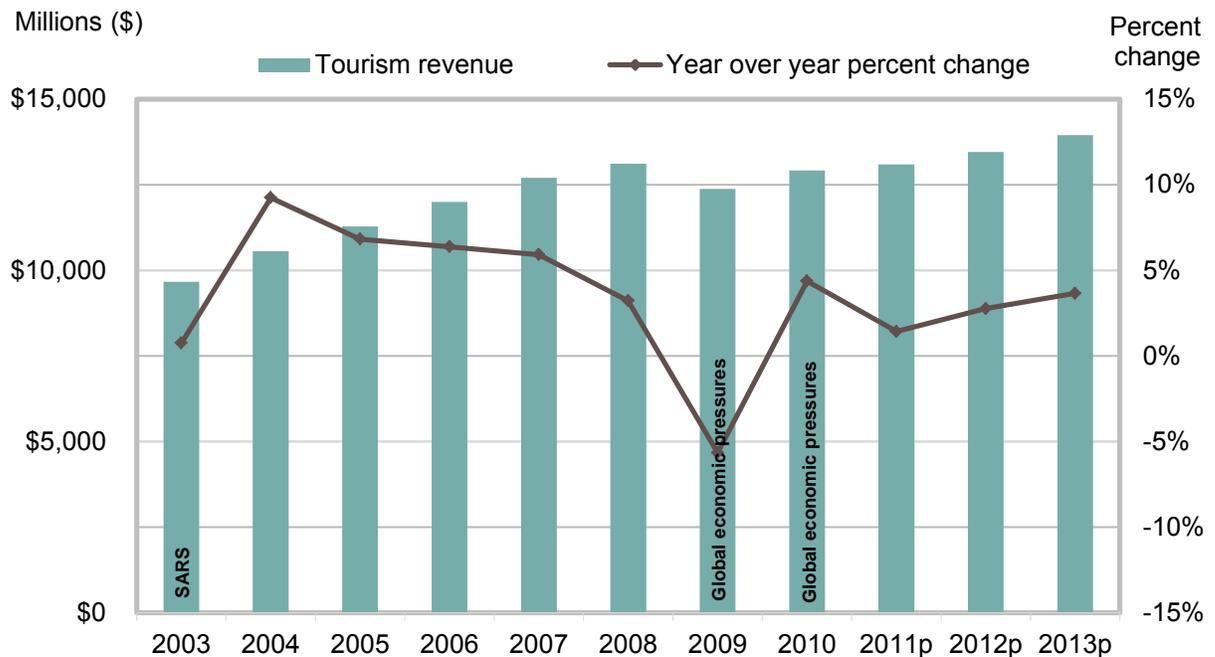
¹⁰ 2013 tourism export revenue data is not yet available; an updated version of this report will be published once final data is available.

TOURISM REVENUES

Total revenue

The tourism industry generated revenues of \$13.9 billion in 2013¹¹, an increase of 3.6% from 2012 (Figure 1). Since 2003, total tourism revenues have grown 44.3%. In fact, tourism revenues have grown every year between 2003 and 2013, with the exception of 2009. However, growth varied considerably, ranging between an increase of 9.2% and a decrease of 5.7%. A decline of tourism revenues in 2009 was caused by numerous factors, notably the global economic recession (particularly the impact on the United States) and the appreciation of the Canadian dollar. The increase in tourism revenues that began in 2010 and continued through 2013 was at least partially attributable to the high-profile exposure from the 2010 Olympic and Paralympic Winter Games, implementation in China of Approved Destination Status for Canada in conjunction with increased air capacity from China, and a rebound of the global economy. See also Table 1, page 32.

FIGURE 1: OVERALL TOURISM REVENUE AND YEAR-OVER-YEAR CHANGE (2003 TO 2013)



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

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

¹¹ Source: BC Stats; 2011, 2012 and 2013 data are preliminary and subject to revision (“2011p”, “2012p” and “2013p”).

Tourism revenue by sector

In 2013, transportation and accommodation & food services generated nearly two-thirds (64.9%) of total tourism revenues, while retail services accounted for more than a quarter (27.2%) of revenues (Figure 2).

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

Since 2003, the accommodation & food services sector has grown by 36.8%, while transportation, retail services and other tourism services saw even stronger growth over the 10-year period, with an increase of 50.3%, 47.7% and 44.1%, respectively.

While the share of total revenue generated by each sector¹² has remained relatively constant from 2003 to 2013, 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 2011, 2012 and 2013. See also Table 2, page 33.

FIGURE 2: SHARE OF 2013 TOURISM REVENUE BY SECTOR

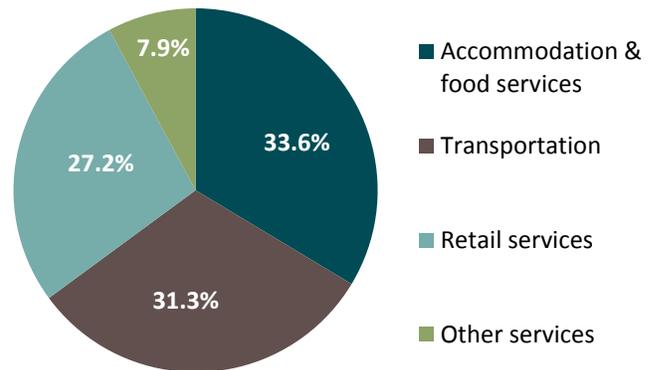
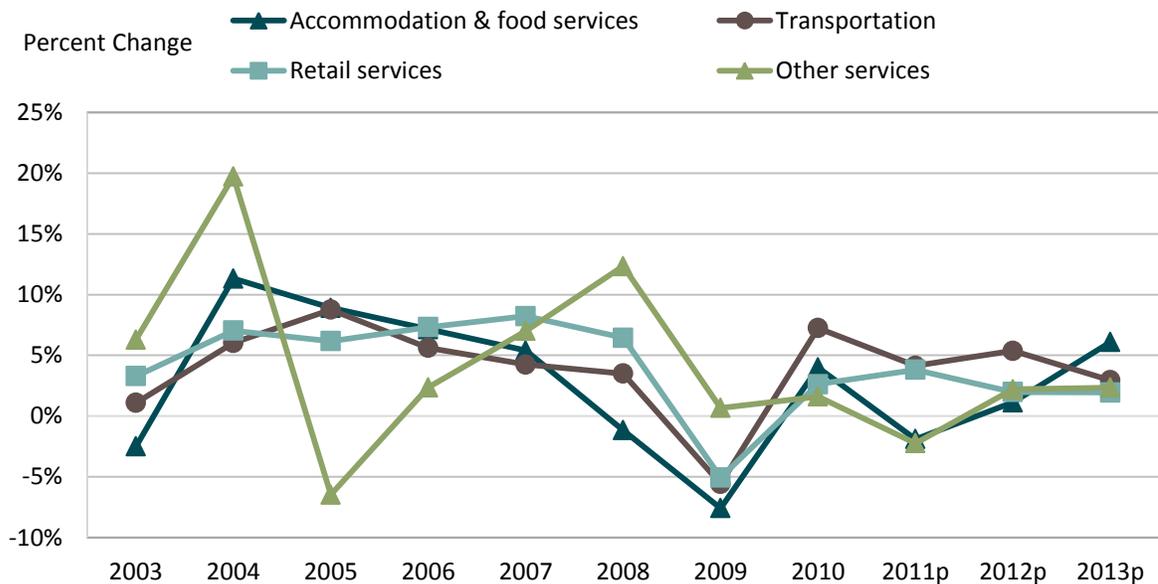


FIGURE 3: TOURISM REVENUE GROWTH RATES BY SECTOR (2003 TO 2013)



¹² 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 & food services contracted in 2003, rebounded with 11.3% growth in 2004, continued growing through 2007, dropped in 2008 and 2009, increased again in 2010, lost a portion of the increase in 2011 but regained it back in 2012 and 2013.

The transportation services sector gained an average 5.0% annual growth from 2003 to 2008, fell by 5.6% in 2009, and rebounded with an increase of 4.1%, 5.4%, and 2.9% in 2011, 2012 and 2013, respectively.

Low growth in retail services in 2003 was followed by an average 7.0% growth from 2004 to 2008. The 5.1% drop in 2009 was nearly overcome in 2010 (2.6%), while growth continued in 2011 (3.8%), 2012 (2.0%) and 2013, but at a slower rate (1.9%).

The performance of other tourism-related services has varied greatly over the years, with a high of 19.7% growth in 2004 to a low of a 6.5% decline in 2005, followed by steadily increasing growth from 2006 through 2008, then a small increase in 2009 and 2010 (0.7% and 1.6%, respectively), slight declines in 2011 (-2.2%), and a growth in 2012 (2.2%) and 2013 (2.3%).

Accommodation room revenue¹³

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.¹⁴

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

Estimated accommodation room revenue based on MRDT is only currently available as a total for 2012. Regional breakdown of MRDT data is not yet available nor the 2013 total accommodation room revenue data. An updated version of this report will be published when the data is available.

Tax revenue

In 2013, the tourism industry generated \$980 million¹⁵ in revenue from provincial taxes, which include income, hotel, gas, and other taxes (Figure 4).

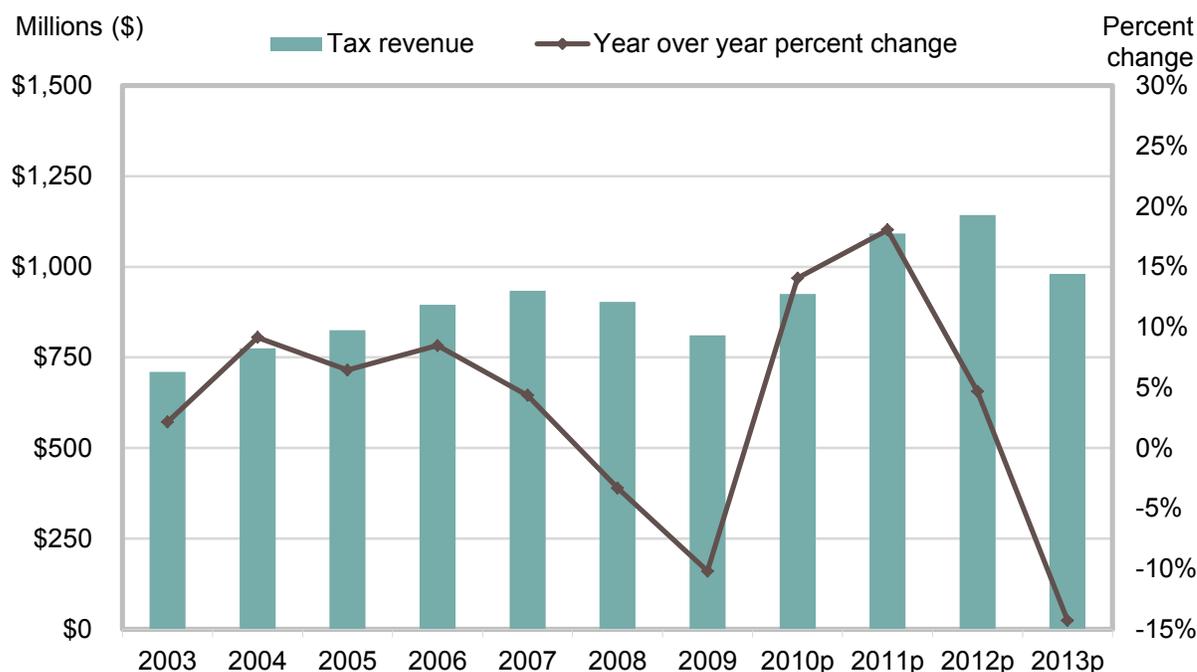
¹³ 2013 accommodation room revenue data is not yet available; an updated version of this report will be published once final data is available.

¹⁴ Historic room revenue estimates were based exclusively on the amount of Hotel Room Tax (HRT) collected by eligible accommodation establishments across British Columbia. This tax was repealed on June 30, 2010. BC Stats is now basing room revenues estimates on the amount of Municipal Regional District Tax (MRDT) collected. Since the MRDT is collected only in certain municipalities in British Columbia, room revenue data will only be provided for those areas that collected MRDT in 2010 and 2011 to allow year-over-year comparisons. (Those areas that no longer collect MRDT have been excluded.) As well, MRDT is not reported for the Cariboo Chilcotin Coast tourism region, as not enough communities in that region collected MRDT to meet data confidentiality requirements. Therefore, "overall" accommodation room revenue is simply the sum of the five other regions' reportable MRDT based estimates of room revenue. MRDT areas account for between 70% and 75% of total provincial accommodation room revenue.

¹⁵ Source: BC Stats; 2011, 2012 and 2013 revenue data are preliminary and subject to revision ("2011p", "2012p" and "2013p").

Since 2003, tax revenue has increased 38.0%. In 2003, British Columbia experienced a 2.2% growth in tourism tax revenue. The growth in tax revenue continued to grow between 2004 and 2007 (average growth of 7.1%), due to industry growth. Provincial tourism tax revenues decreased in 2008 and 2009, but increased by 14.1% in 2010, as the industry recovered from the global recession and the Harmonized Sales Tax (HST) was introduced. In 2011, provincial tourism tax revenue grew by 18.1% due in large part to the HST¹⁶. In 2012, the second full year of the HST, tax revenues stabilized with 4.7% growth. 2013 witnessed a decrease of 14.3% over 2012. This decrease was due to British Columbia's transition from the Harmonized Sales Tax (HST) to the Provincial Sales Tax (PST) on April 1, 2013. See also Table 1, page 32.

FIGURE 4: TOURISM-RELATED TAX REVENUE AND YEAR-OVER-YEAR CHANGE (2003 TO 2013)



Export revenue¹⁷

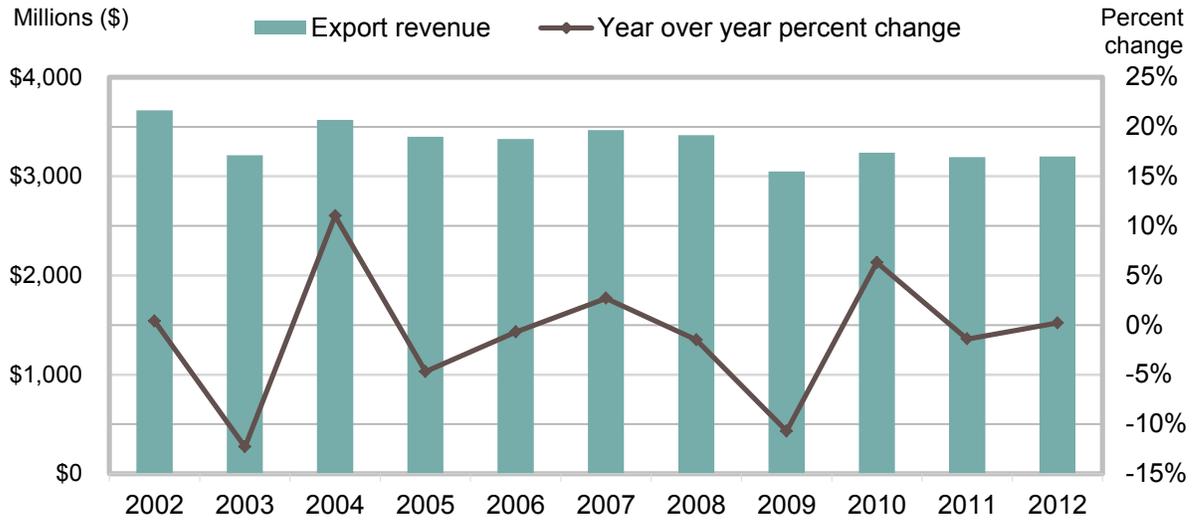
Export revenue is generated from the sale of tourism products and services to international visitors. The tourism industry generated \$3.2 billion in export revenue in 2012, similar to 2011 (0.2%) (Figure 5).

Tourism export revenue varied considerably between 2002 and 2012. In 2003, export revenue declined by 12.3%, due to the impact of SARS, but then rebounded 11.0% the following year. Export revenue dropped by 4.7% in 2005 and stabilized in 2006. The slight gain in 2007 was lost in 2008 and export revenue dropped dramatically in 2009, as the global recession impacted international markets. Export revenue grew by 6.3% in 2010, dipped by 1.4% in 2011 and grew very slightly in 2012 (0.2%). Overall, tourism export revenue decreased by 12.6% between 2002 and 2012. See also Table 1, page 32.

¹⁶ 2011 was the first full year of the Harmonized Sales Tax (HST) implementation. The HST is applicable to consumer purchases, many of which were previously exempt from the Provincial Sales Tax.

¹⁷ 2013 tourism export revenue data is not yet available; an updated version of this report will be published once final data is available.

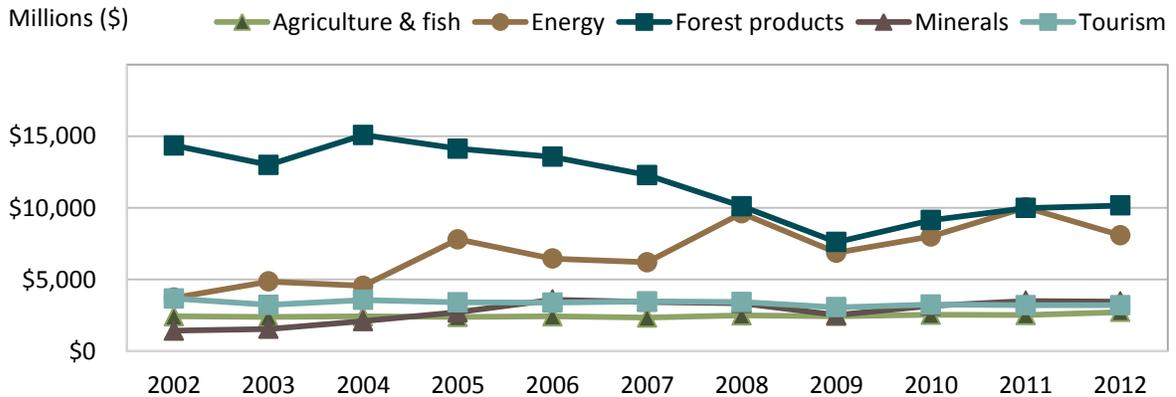
FIGURE 5: TOURISM EXPORT REVENUE (2002 TO 2012)



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

Forest product export revenues have increased since 2009 to \$10.2 billion, gaining some growth back from the annual declines as of 2005, but are still down 29% since 2002.¹⁸ Energy exports generated the largest export revenues in 2011 (\$8.1 billion), but declined by 19.4% in 2012. There has been a dramatic increase (117.7%) in energy export revenues since 2002.

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



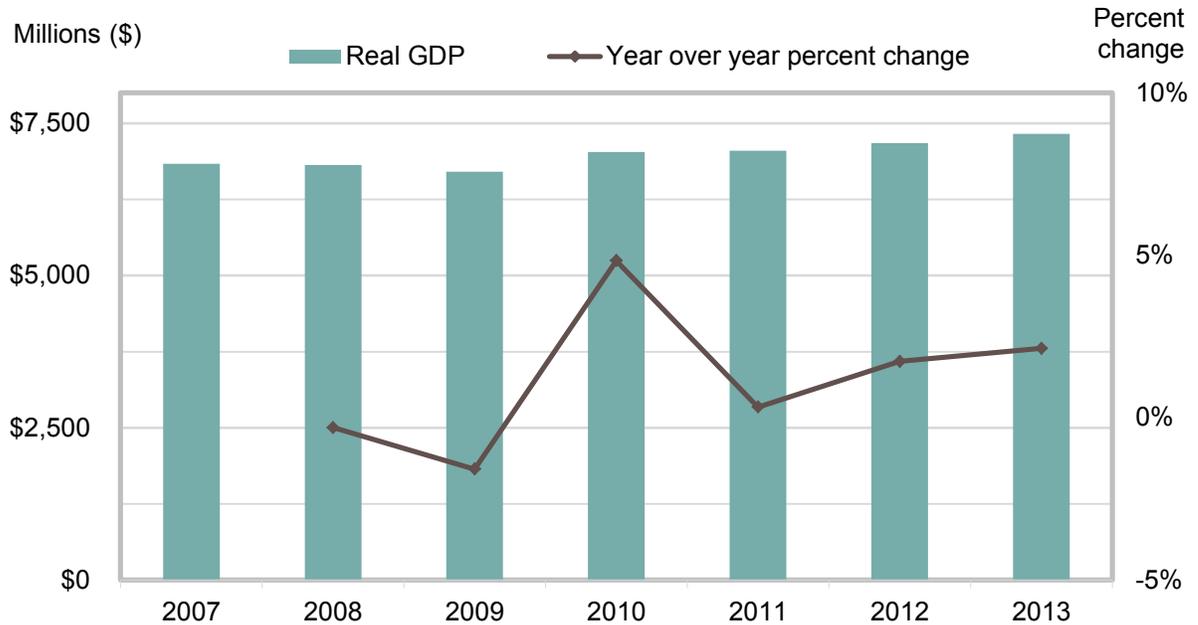
¹⁸ Ministry of Forests and Range, 2009/10-2011/12 Service Plan Update: Declines were due to the weakening housing market, low timber prices, softwood lumber duties and the weakening pulp market.

GROSS DOMESTIC PRODUCT (GDP)

GDP

While the tourism industry generated \$13.9 billion in total revenue, it contributed \$7.3 billion of added value to the economy in 2013, measured using GDP (in 2007 constant dollars).¹⁹ This was an increase of 2.1% compared with 2012, and over a 7.2% increase from 2007 (Figure 7). See also Table 1, page 32.

FIGURE 7: TOURISM GROSS DOMESTIC PRODUCT AND YEAR-OVER-YEAR CHANGE (2007 TO 2013)

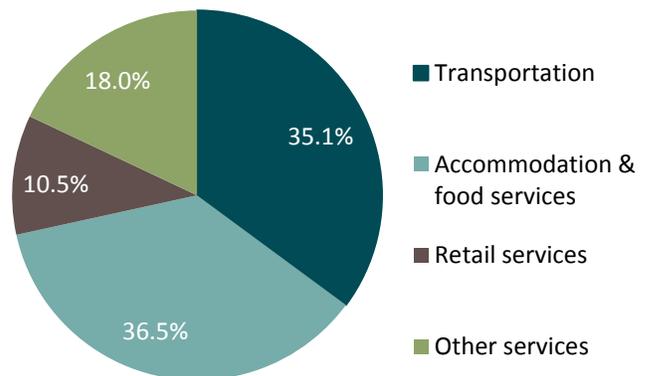


GDP by sector

In 2013, transportation and accommodation & food services accounted for 71.6% of tourism GDP (based on 2007 constant dollars) (Figure 8).

While retail services earned 27.2% of revenue, this sector only accounted for 10.5% of GDP. Comparatively, other services earned 7.9% of revenue but accounted for more than double that in terms of share of GDP.

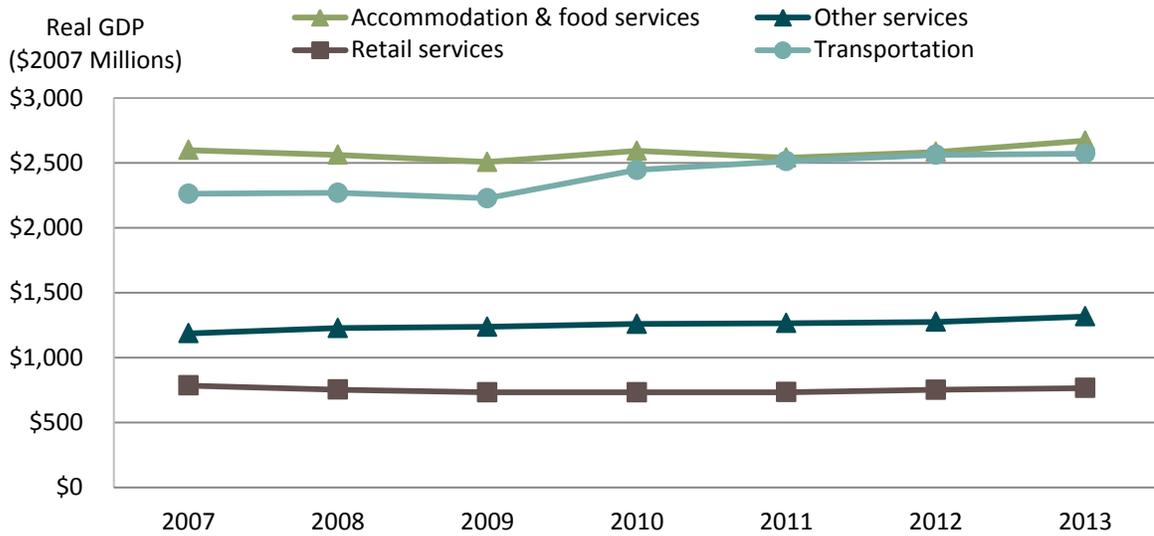
FIGURE 8: SHARE OF 2013 GDP BY SECTOR



¹⁹ Source: BC Stats; Real GDP data for 2011, 2012 and 2013 are preliminary estimates and are subject to revision ("2011p" "2012p" and "2013p"). Pre-2007 real GDP data is not yet available.

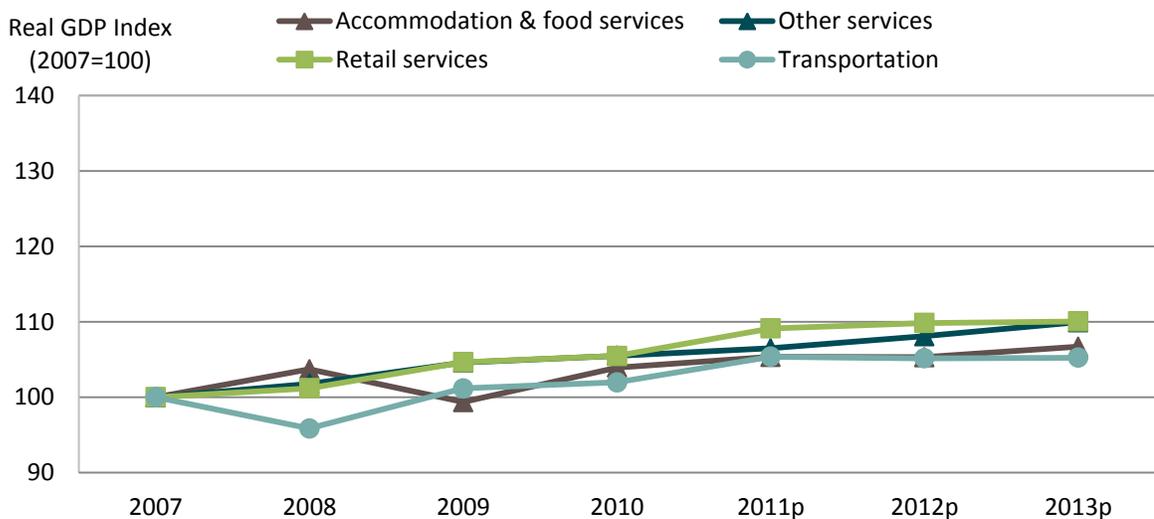
Transportation and other services have seen growth in real GDP since 2007 (13.7% and 11.0%, respectively) and to a less extent accommodation & food services (2.8%). However, retail has seen a decline of 2.4% since 2007 (Figure 9). See also Table 4, page 35.

FIGURE 9: REAL GDP BY SECTOR (2007 TO 2013)



Accommodation & food services and transportation lost ground in 2009, but resumed growth in 2010, which continued through 2013. The retail services sector has seen flat growth since declines in 2009 and grew 2% in 2012 and 2013 (Figure 10). See also Table 5, page 36.

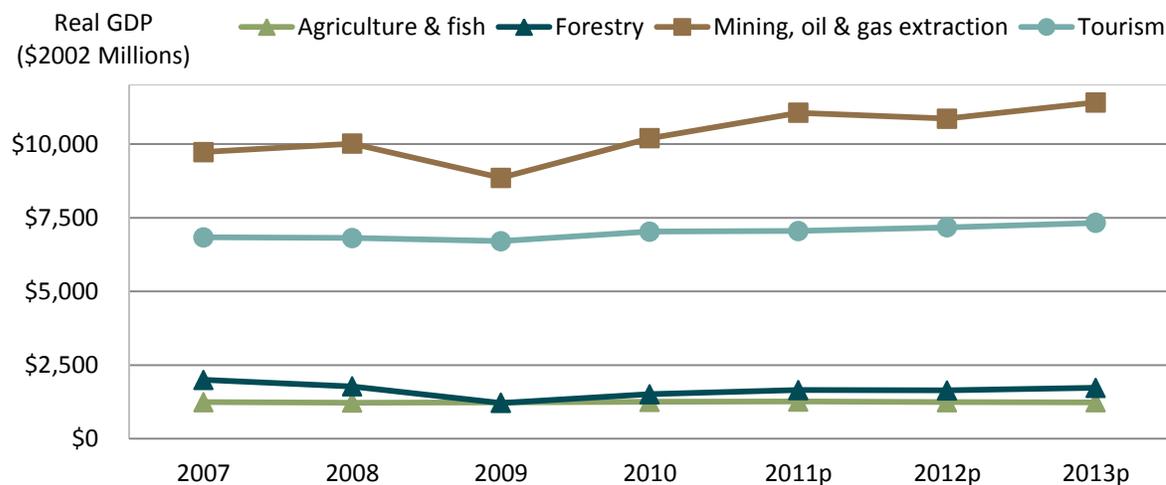
FIGURE 10: REAL GDP INDEX BY SECTOR (2007 TO 2012)



GDP by primary resource industry

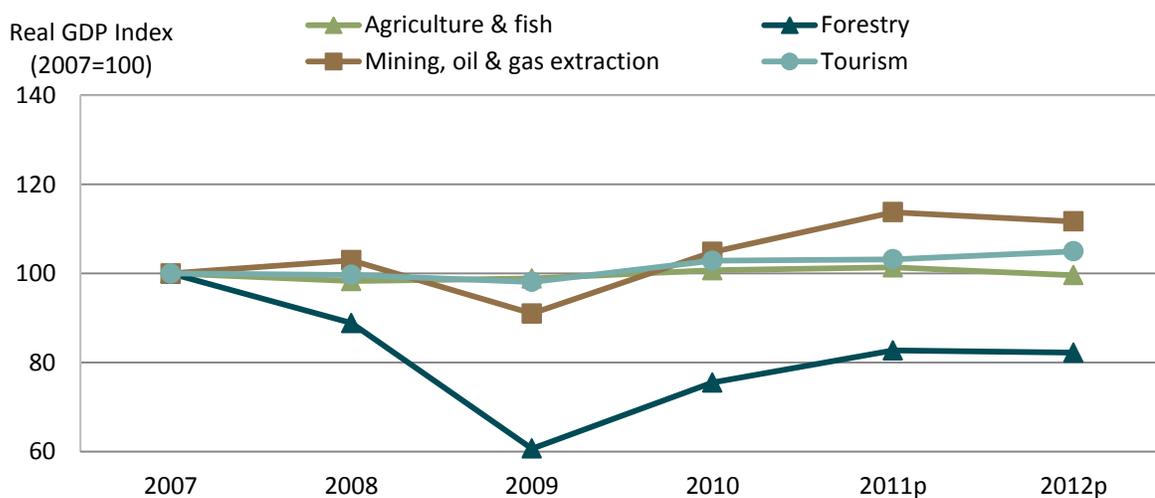
The tourism industry makes a significant contribution to the British Columbia economy compared with other primary resource industries²⁰, including forestry, agriculture & fish²¹, and mining, oil & gas extraction (Figure 11). See also Table 6, page 36. From 2007 to 2013, GDP of the mining, oil & gas extraction, and tourism industries have each increased (17.3% and 7.2%, respectively), while forestry has dropped significantly (-13.7%), and agriculture & fish have dropped slightly (0.8%).

FIGURE 11: REAL GDP BY PRIMARY RESOURCE INDUSTRY (2007 TO 2013)



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

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



²⁰ Source: BC Stats (<http://www.bcstats.gov.bc.ca/StatisticsBySubject/Economy/EconomicAccounts.aspx>, 2002-2012, chained 2007\$).

²¹ "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 British Columbia economy, the industry supports a wide range of small, medium and large businesses, and provides jobs across the province. Every year, new tourism businesses are established and others are closed.

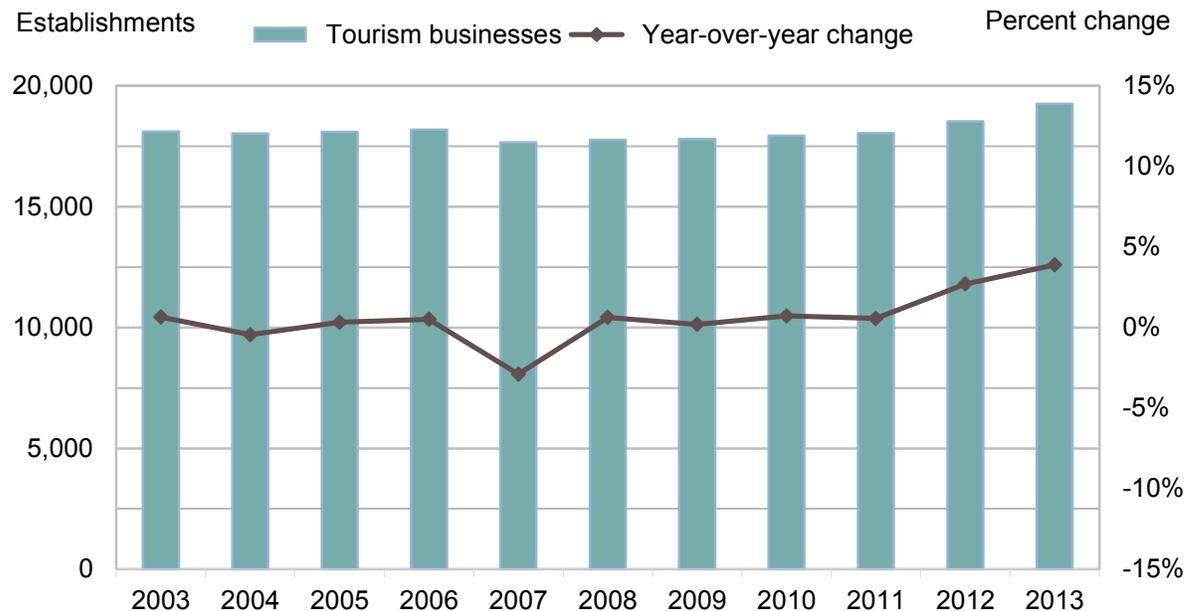
This section summarizes the number of tourism establishments (businesses) in British Columbia and provides statistics on tourism establishments. Detailed tables are available in Appendix A; Tables 1 and 7 through 12 are specific to the information covered in this section.

TOURISM BUSINESSES

Total establishments

In 2013, there were 19,254²² tourism-related establishments operating in British Columbia (Figure 13). The number of tourism establishments was fairly steady from 2003 to 2011, with overall growth of only 0.4%, while 2012 and 2013 saw more substantial growth of 2.7% and 3.9% respectively. See also Table 1, page 32.

FIGURE 13: COUNT OF TOURISM BUSINESSES AND YEAR-OVER-YEAR CHANGE (2003 TO 2013)



The decrease in the number of tourism establishments in 2007 occurred primarily among very small businesses (those of 1 to 4 employees).²³ In 2006, very small businesses accounted for 45.4% of businesses; in 2007, the number of very small businesses

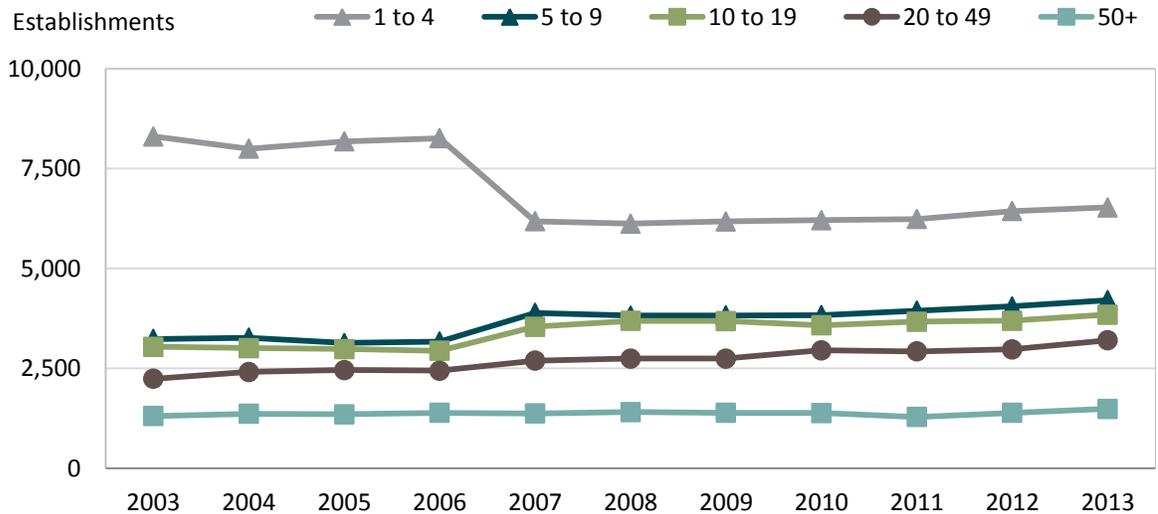
²² Source: BC Stats.

²³ The decrease in the number of tourism establishments in 2007 was attributed to the introduction of new “inactivation rules” in the redesigned Business Register to detect inactive businesses as early as possible, resulting in a more accurate reflection of the operating structure of businesses (<http://ivt.crepuq.qc.ca/industries/documentation/brengl3.pdf>).

dropped to 6,179, a decline of 25.2% from the previous year²⁴ (Figure 14). See also Table 7, page 37.

From 2007 through 2011, the number of businesses (of all sizes) was nearly stable. In 2013, businesses with more than 20 employees saw 7.4% growth (7.7% for 20 to 49 employees and 7.2% for 50+ employees).

FIGURE 14: COUNT OF TOURISM BUSINESSES BY SIZE (NUMBER OF EMPLOYEES) (2003 TO 2013)

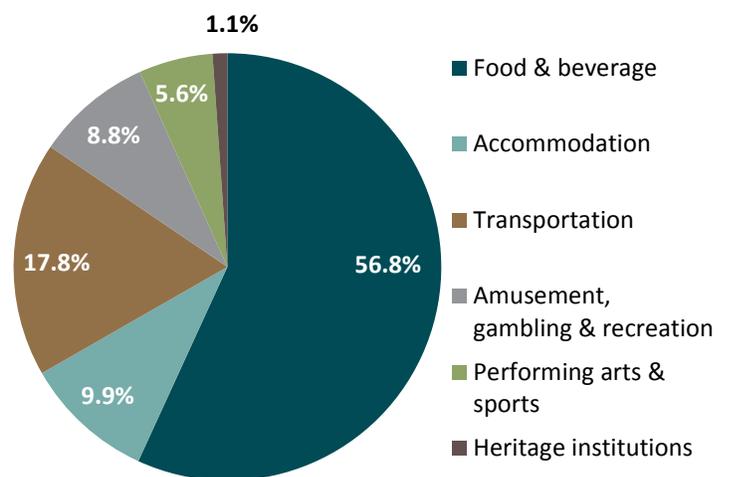


Tourism businesses by sector

Two-thirds of British Columbia's tourism-related businesses are in the accommodation and food & beverage sectors, while transportation is the next largest sector (Figure 15).²⁵

The performing arts & sports and food & beverage sectors experienced overall growth since 2003 (by 11.5% and 13.6%, 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 16). See also Table 8, page 38. While the performing arts & sports sector experienced the largest decline in 2007, growth in nearly

FIGURE 15: SHARE OF 2013 TOURISM BUSINESSES BY SECTOR



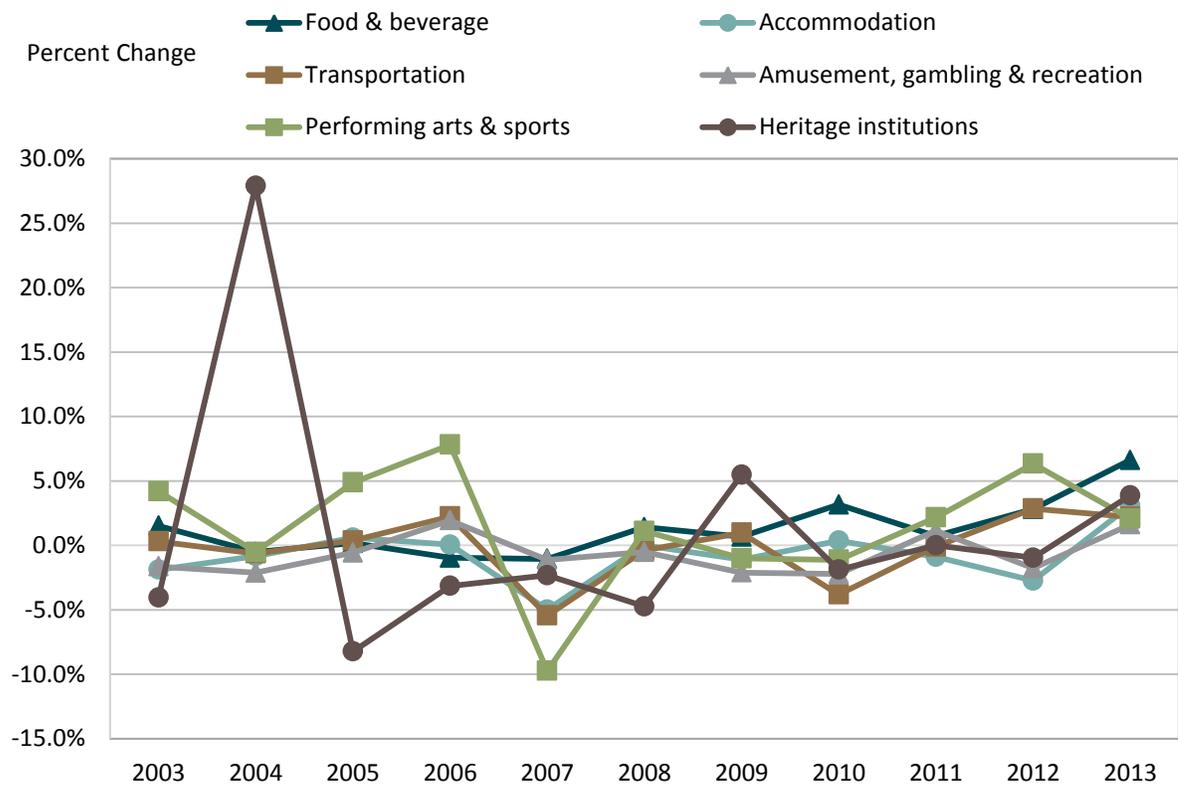
²⁴ As noted in the previous footnote, the large decline was partly the result of the redesign of the Business Register.

²⁵ 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.

all other years has kept this sector in expansion. The number of heritage institutions spiked by 27.9% in 2004 (due to the provincial government devolving the management of 28 heritage properties), and also grew in 2009 (by 5.5%) and 3.9% in 2013. Overall, the number of heritage institutions has grown by 12.6% since 2003.

The number of businesses in both the accommodation and transportation sectors have declined in the ten-year period from 2003 to 2013 (-6.4% and -2.0%, respectively), in large part due to declines in 2007 (and 2012 for the accommodation sector). Other than slight growth in 2006 and 2013 (by 1.9% and 1.6% respectively), the amusement, gambling and recreation sector has also been slowly but continually declining since 2003, for an overall decrease of 5.7%.

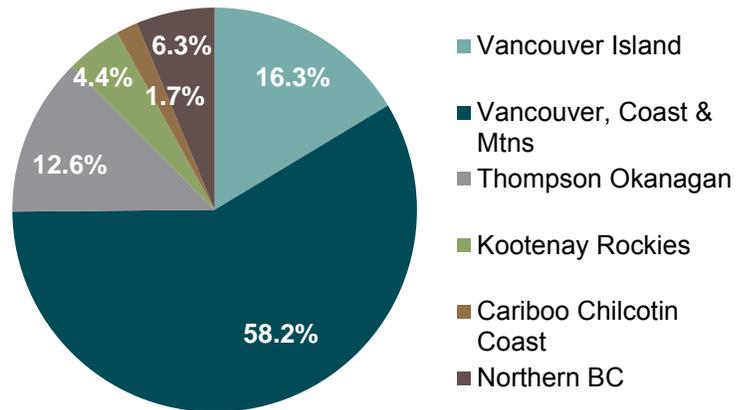
FIGURE 16: TOURISM BUSINESS GROWTH RATES BY SECTOR (2003 TO 2013)



Tourism businesses by region

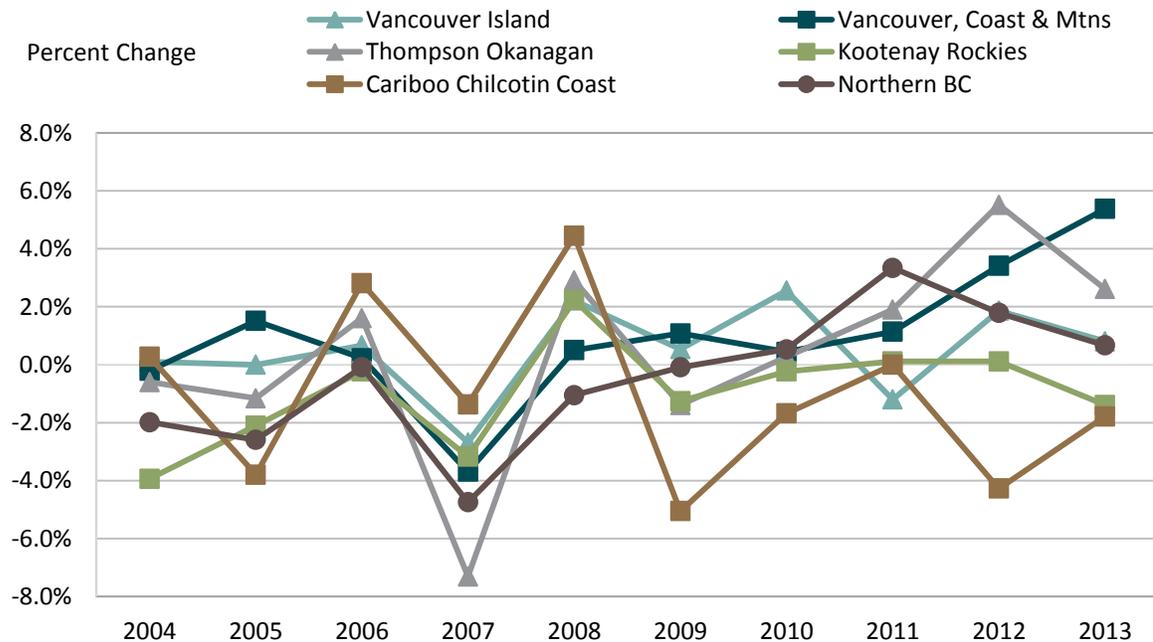
More than half of British Columbia's tourism-related businesses are located in the Vancouver, Coast & Mountains region (Figure 17). This region and the two other largest regions (Vancouver Island and the Thompson Okanagan) account for 87.1% of British Columbia's tourism establishments. The Vancouver, Coast & Mountains (5.4%), Vancouver Island (0.8%), Northern BC (0.7%), and the Thompson Okanagan (2.6%) regions all saw growth in tourism businesses in 2013 (over 2012), while the Kootenay Rockies and the Cariboo Chilcotin Coast dropped (-1.4% and -1.8%, respectively) in 2013 over 2012.

FIGURE 17: SHARE OF 2013 TOURISM BUSINESSES BY REGION



Since 2003²⁶, the number of tourism establishments has increased by 4.8% in the Vancouver Island region, 10.0% in the Vancouver, Coast & Mountains region and 3.9% in the Thompson Okanagan (Figure 18). See also Table 9, page 39. The Cariboo Chilcotin Coast (-10.3%), the Kootenay Rockies (-9.6%), and Northern BC (-4.4%) have each experienced declines in the number of tourism establishments since 2003.

FIGURE 18: TOURISM BUSINESS GROWTH RATES BY REGION (2004 TO 2013)



²⁶ The number of businesses without geocoding (the process of assigning latitude and longitude to a point to provide geographic coordinates for an address) decreased dramatically in 2003. Specifically, standard geographic coding was not available for 1,708 businesses in 2001 and 1,741 in 2002, but dropped to 23 in 2003. Therefore, the number of businesses by tourism region is not reported before 2003.

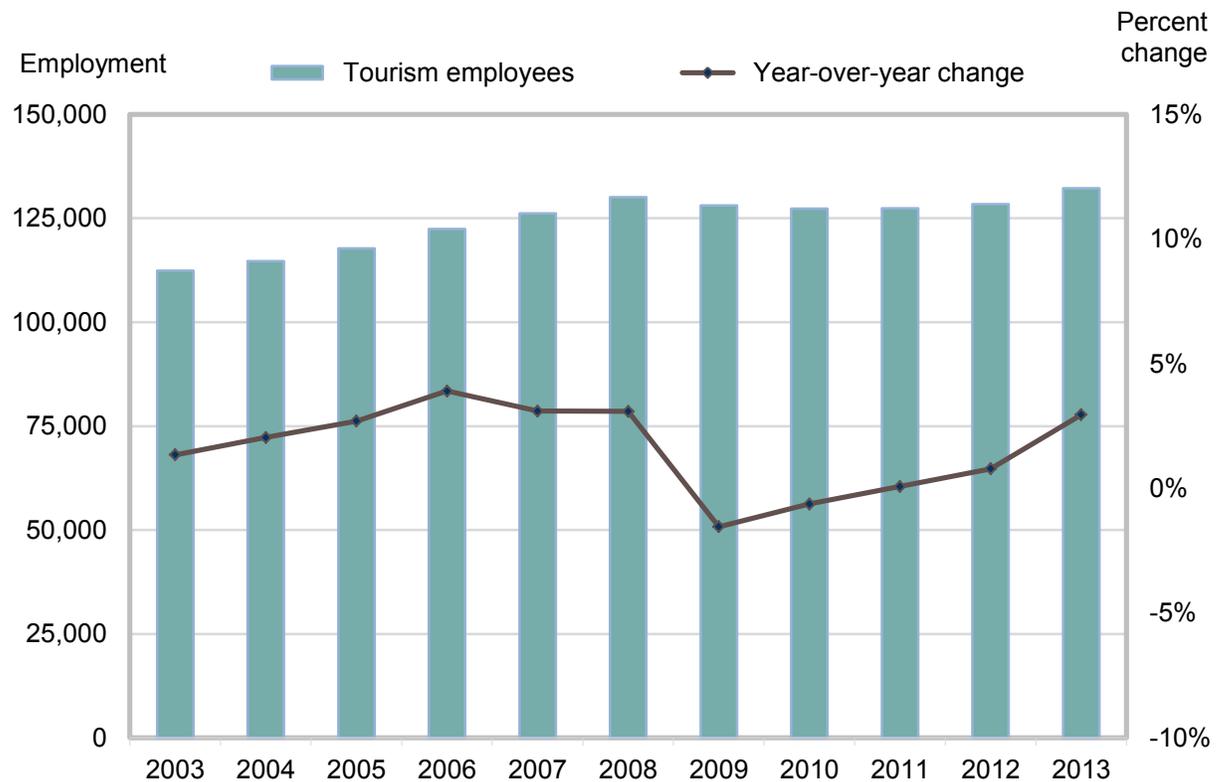
TOURISM EMPLOYMENT

Direct employment

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

In 2013, British Columbia tourism industry employment was 132,200, a 3.0% increase from 2012 (Figure 19).²⁷ Since 2003, the number of people employed in the tourism industry has grown by 17.6%. Between 2003 and 2013, employment in the tourism industry peaked in 2008 at 130,100. Since then, employment has declined by 1.5% and 0.6% in 2009 and 2010, respectively, with fewer people employed in 2011 and 2012. See also Table 1, page 32.

FIGURE 19: EMPLOYMENT IN THE TOURISM INDUSTRY AND YEAR-OVER-YEAR CHANGE (2003 TO 2013)



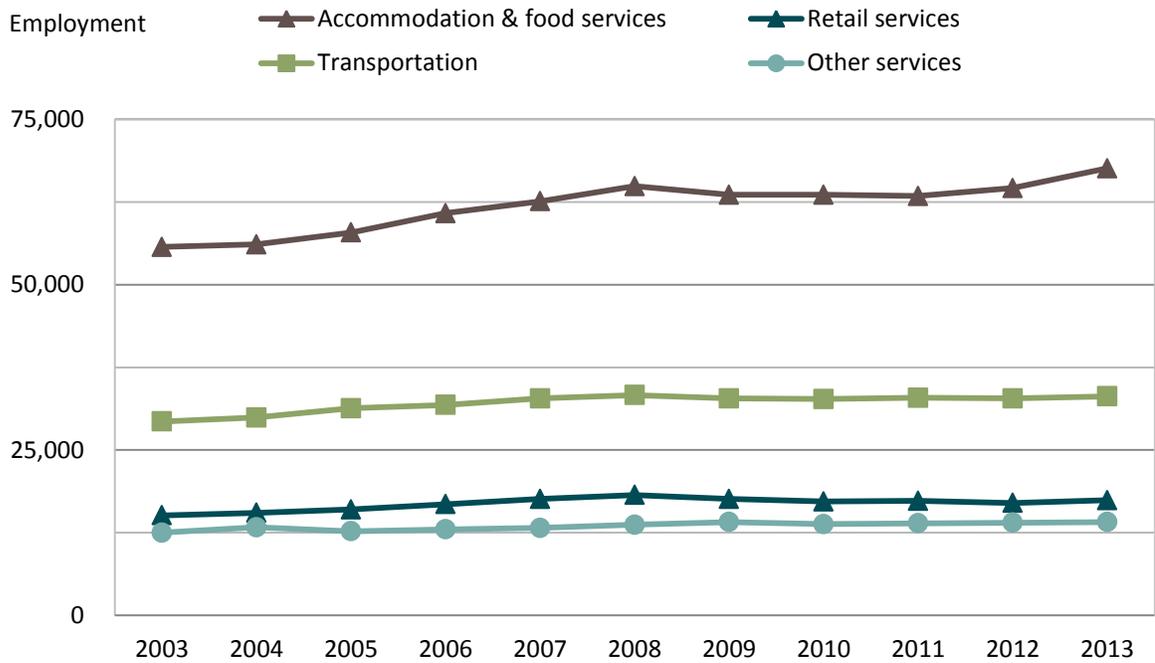
²⁷ Tourism employment estimates are developed from Statistics Canada's Survey of Employment, Payroll and Hours (SEPH), and are derived from information on payroll deductions. SEPH may under-report employment, as it does not include self-employed workers, who do not make payroll deductions. The Labour Force Survey also collects employment data, and the individual coding estimates are available; however, the coding by industry is less reliable than SEPH, so industry breakdowns are less accurate.

Tourism employment by sector

The accommodation and food services sector accounts for half (51.1%) of all tourism employment in British Columbia, while retail services sector accounts for another quarter (25.0%) (Figure 20).

Since 2003, the number of employees has grown by 15.2% in the retail services, 21.4% in the accommodation & food services, 13.0% in the transportation sector, and by 12.8% in other services. See also Table 10, page 40.

FIGURE 20: TOURISM EMPLOYMENT BY SECTOR (2003 TO 2013)



Tourism employment by region²⁸

As with the number of tourism establishments, the Vancouver, Coast & Mountains region has the largest share of British Columbia tourism employment (63.9%), and is followed by Vancouver Island (13.2%) and the Thompson Okanagan (11.5%) (Figure 21). Combined, these three regions account for 88.5% of all tourism employment in British Columbia.

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

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

FIGURE 21: SHARE OF 2012 TOURISM EMPLOYMENT BY REGION

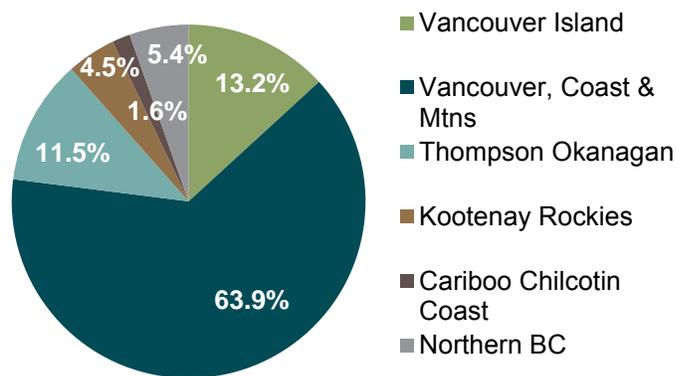
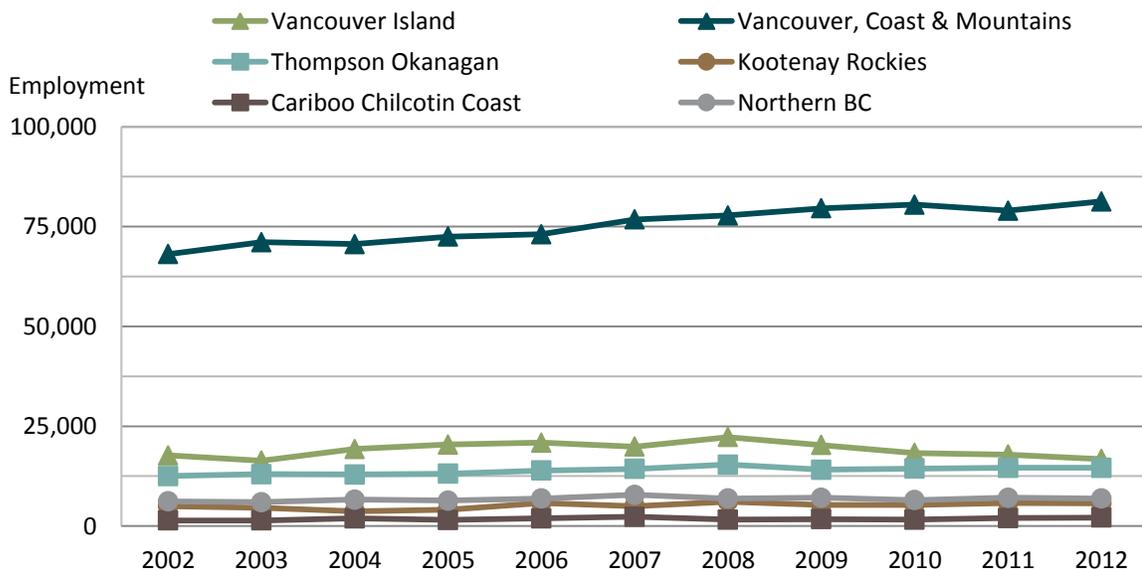


FIGURE 22: TOURISM EMPLOYMENT BY REGION (2002 TO 2012)



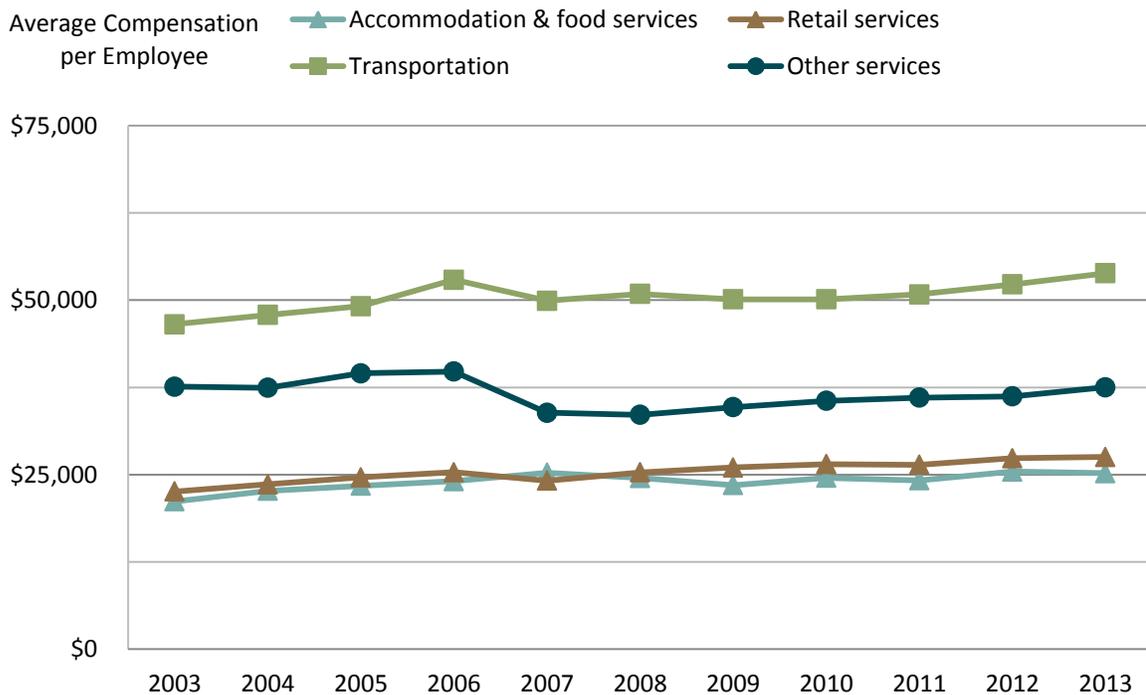
²⁸ 2013 tourism employment by region data is not yet available; an updated version of this report will be made available once final data has been obtained.

Wages and salaries

The tourism industry paid \$4.5 billion in wages and salaries in 2013.²⁹ Compared to 2012, the number of employees and employees' earnings have increased 3.0% and 3.8%, respectively (Figure 23).

While tourism wages and salaries posted an increase of 34.3% since 2003, the growth in compensation has not been steady. Since 2003, earnings continued to grow by an average of 4.7% from 2004 through 2008. Wages and salaries dropped during the 2009 economic downturn, but picked up again in 2010. See also Table 1, page 32.

FIGURE 23: WAGES & SALARIES PAID IN THE INDUSTRY AND YEAR-OVER-YEAR CHANGE (2003 TO 2013)



²⁹ Source: BC Stats.

Tourism salaries by sector

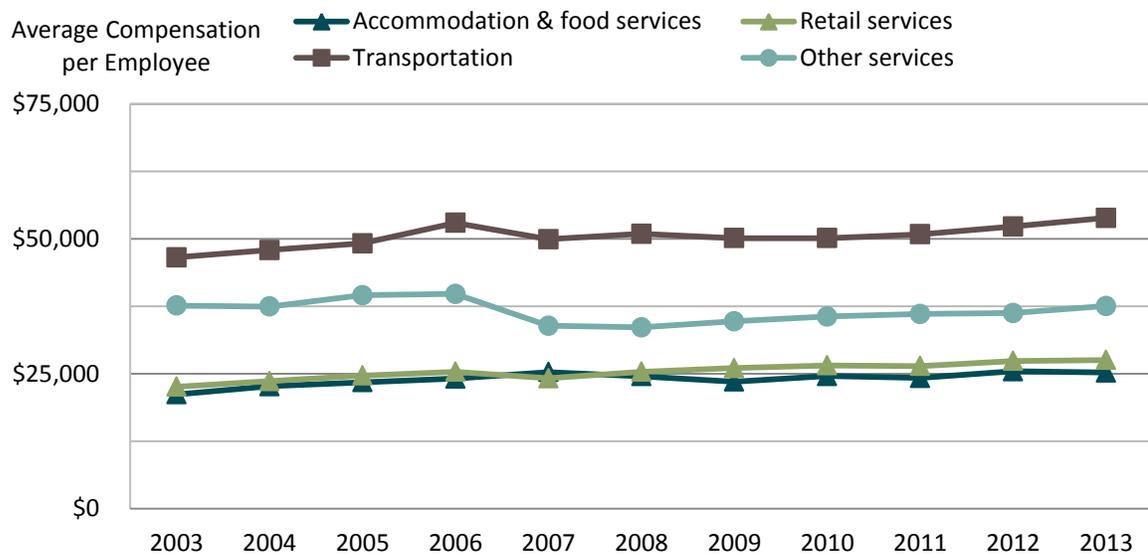
As mentioned earlier, the accommodation & food services sector comprises half of all tourism businesses; however, this sector only earns 37.9% of tourism wages and salaries. In contrast, the transportation sector accounts for 13.2% of tourism establishments but takes 39.7% of tourism earnings (Figure 24). See also Table 12, page 41.

FIGURE 24: SHARE OF 2013 TOURISM EMPLOYMENT AND SALARIES BY SECTOR



While the average compensation per employee in all tourism sectors has increased since 2003, the average compensation within transportation has been more than double the figure for accommodation & food (Figure 25). Since 2003, growth in average earnings has been highest in retail services (21.9% increase in the ten-year period), followed by accommodation & food services (19.1%), and transportation (15.7%). Other services sector have seen declines since 2003 (-0.2%).

FIGURE 25: AVERAGE COMPENSATION PER EMPLOYEE BY SECTOR (2003 TO 2013)



4. Market origin

Market origin data is captured through visitor surveys. Destination British Columbia relies on two surveys³⁰ 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/revenue³¹ estimates.

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

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

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

This section summarizes visitor volume of overnight travellers to British Columbia (i.e., one or more nights were spent in British Columbia) by international, domestic and all travellers to British Columbia. This section also reports tourism expenditures by origin from the visitor surveys to provide a more complete picture of British Columbia's tourism markets.

International visitor volume and expenditures data for 2013 is not yet available for reporting. Accordingly, the 2012 data for both international and domestic markets will be

³⁰ 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.

³¹ Trip expenditures (from the visitor's perspective) are the flip side of tourism revenues (from the BC economy's perspective).

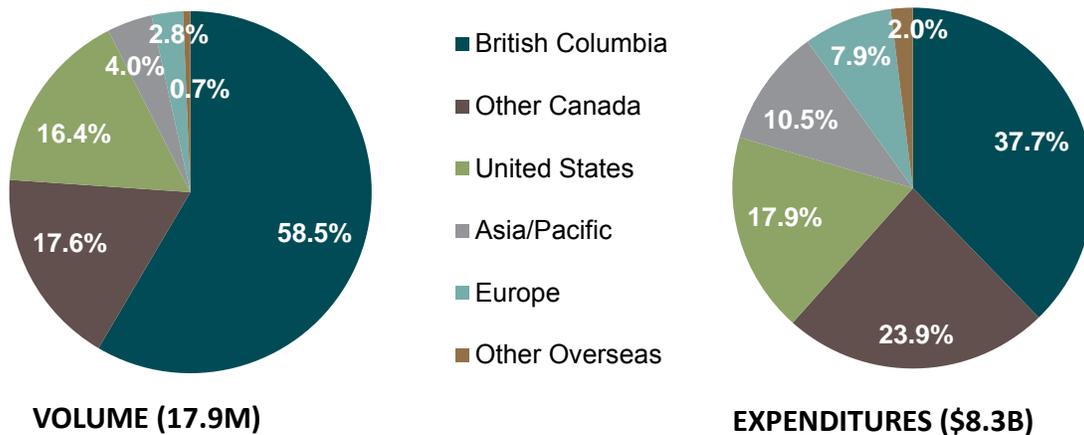
used when reporting the overall visitor volume and expenditures. An updated version of this report will be made available when final data is provided.

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

Overall visitor volume and expenditures³²

In 2012, there were 17.9 million overnight visitors in British Columbia, an increase of 1.1% over 2011, who spent \$8.3 billion, a decline of 2.4% from 2011³³. Over half of the visitors (58.5%) were British Columbia residents (Figure 26). Visitors from other parts of Canada accounted for 17.6% of all visits, while international visitors accounted for the remaining 23.9% of visitor volume. However, international visitors accounted for 38.4% of visitor expenditures. British Columbia residents accounted for 37.7% and Canadian residents accounted for 23.9% of visitor expenditures.

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



Domestic Markets: visitor volume and expenditures

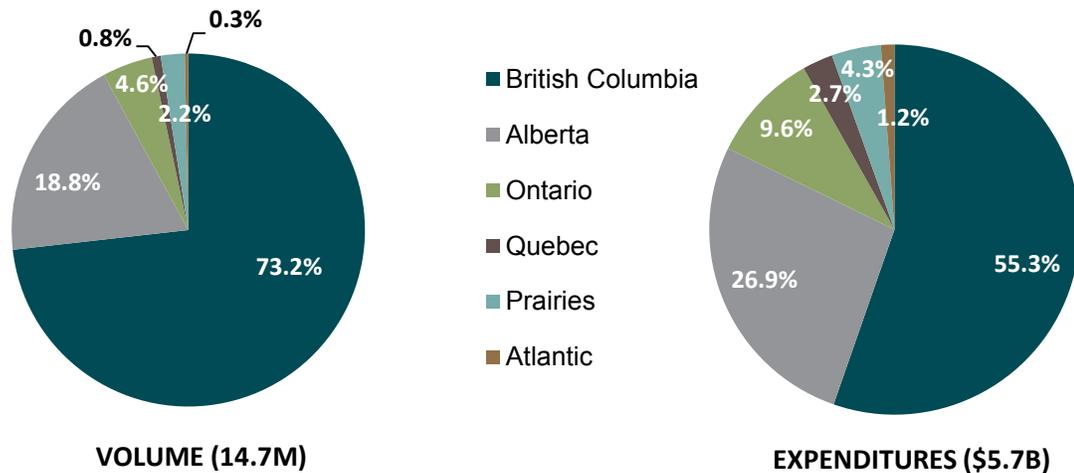
Overnight visitors from Canada accounted for over 14.7 million travellers in 2013, a 7.8% increase from 2012. Of travellers from Canada, British Columbia residents made up the largest share of visitor volume (73.2%) and expenditures (55.3%) in 2013 (Figure 27). Alberta was the second largest domestic market of overnight visitors to British Columbia, representing 18.8% of the Canadian visitor volume and 26.9% of expenditures. Overall, visitors from Canada spent about 10.4% more in 2013 than in 2012.

³² 2013 international visitors volume and expenditures data is not yet available; an updated version of this report will be made available once final data has been obtained.

³³ Source of domestic data: Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC). Methodological changes to the Travel Survey of Residents of Canada do not allow comparisons before 2011 and therefore, time series data is not available for domestic markets. An updated version of this report will be made available when final data is available.

Source of international data: Statistics Canada, International Travel Survey.

FIGURE 27: SHARE OF 2013 DOMESTIC VISITOR VOLUME AND EXPENDITURES BY MARKET ORIGIN



In 2013, the number of visitors from Alberta and Prairies increased substantially by 28.6% and 15.5%, respectively and their expenditures grew by 44.2% and 33.6%, respectively over 2012. Compared to 2012, visitor volume from Ontario increased by 20.2% in 2013, however, their expenditures slightly declined by 1.0%.

Visitor volume from British Columbia grew steadily from 2011 to reach 10.7 million visitors in 2013. In 2013, British Columbia visitor volume has grown by 2.6% over 2012, but visitor expenditures have decreased by 0.3% over 2012.

The growth of visitor volume from Quebec increased by a 4.3% over 2012, and their expenditures have shown substantial growth since 2012 (13.2%).

Visitor volume from Atlantic Provinces dropped by 11.5% in 2013 (over 2012), however, their expenditures grew 8.0% in 2013 (over 2012).

International markets: visitor volume and expenditures³⁴

In 2012, over 4.3 million international overnight visitors came to British Columbia. The number of international visitors increased by 0.5% from 2011, but has declined by 12.8% from 2007, and by 19.9% since 2002.³⁵ With expenditures at \$3.2 billion, international visitors spent 0.2% more in 2012 than in 2011, and less than in either 2007 (-7.6%) or 2002 (-12.8%).

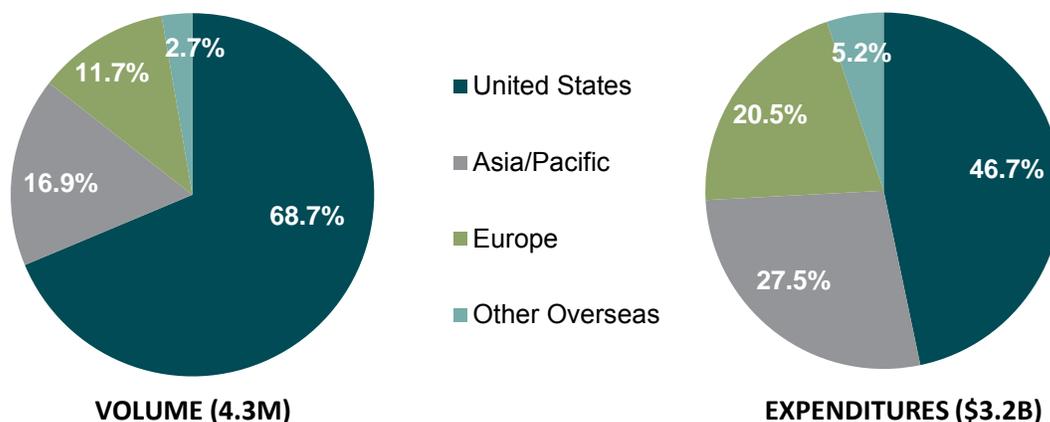
The United States is the largest overnight international market for British Columbia, comprising 68.7% of international visitor volume and 46.7% of expenditures in 2012 (Figure 28). Asia/Pacific and Europe comprise 28.6% of the international market and

³⁴ 2013 International visitors volume and expenditures data is not yet available; an updated version of this report will be made available once final data has been obtained.

³⁵ Unlike domestic data, international data is available for the entire 10-year period referred to in this report. Therefore, comparisons are provided back one year (to 2011) and back ten years (to 2002) to complement the majority of this report. Due to recent methodological survey changes with the ITS, quantifying a 10-year trend is not feasible.

almost half of expenditures (48.1%), while other overseas markets account for the remaining small portion.

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



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

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

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

Visitor volume from Mexico grew steadily from 2004 through 2008 to 82,000 visitors. Volume dropped in 2009 and 2010 due to the introduction of the visa requirements for Mexican visitors, stabilized in 2011 and grew to 57,000 in 2012. In 2012, Mexico visitor volume has grown over 2002 by 6.5%, but has decreased by 16.6% from 2007. Mexico visitor expenditures have followed the same path as that of volume, with annual growth

from 2004 through 2008 to \$96 million. This growth was followed by a 7.3% decline in 2009, a 24.9% decline in 2010, but stabilization in 2011 and substantial growth in 2012 (35.2%). Expenditures from the Mexico market have shown substantial growth since 2002 (55.1%) and moderate growth since 2007 (7.3%).

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

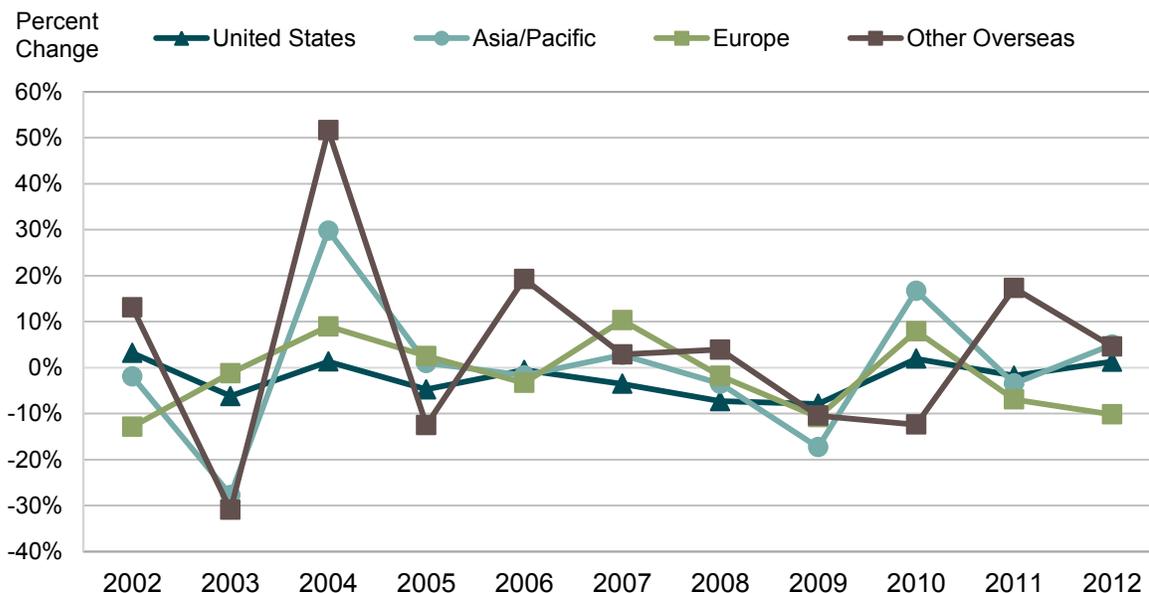
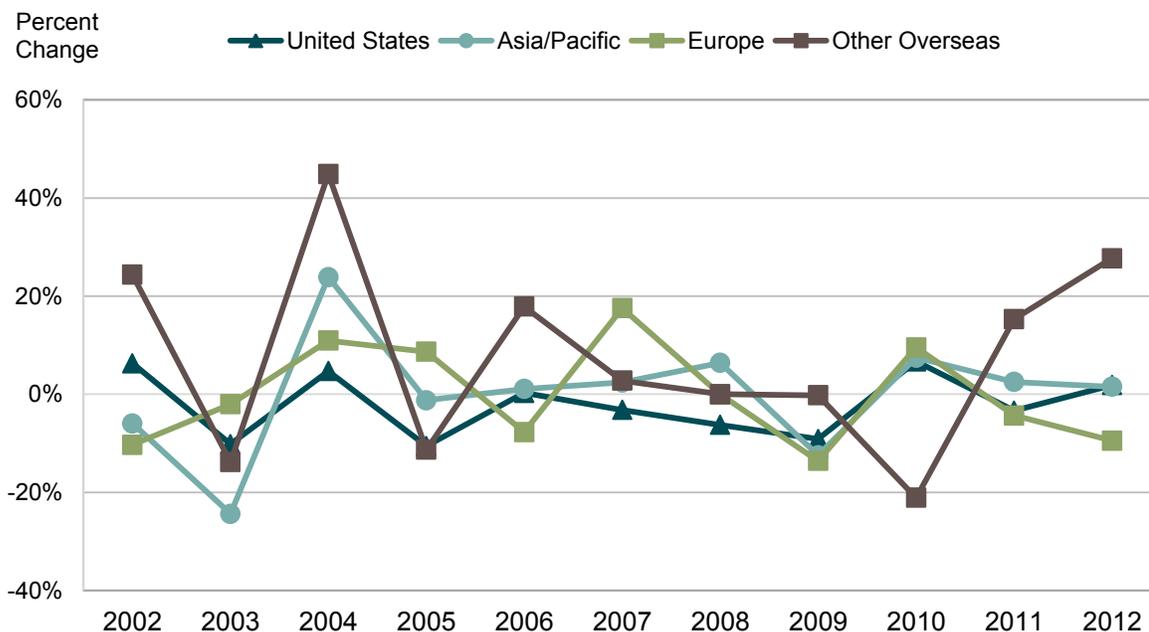


FIGURE 30: INTERNATIONAL VISITOR EXPENDITURE GROWTH RATES BY MARKET ORIGIN (2002 TO 2012)



5. Summary

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

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

Tourism Indicators	2013	% Change from 2012	% Change from 2003
Total Tourism Revenue	\$13.9B	↑ 3.6%	↑ 44.3%
Accommodation Room Revenue ^A	Data not available		
Provincial Tax Revenue	\$980M	↓ 14.3%	↑ 38.0%
Export Revenue (2012)	\$3.2B	↑ 0.2%	↓ 12.6%
Gross Domestic Product (2007 constant dollars) ^C	\$7.3B	↑ 2.1%	↑ 7.2% ^C
Tourism-Related Businesses	19,254	↑ 3.9%	↑ 6.3%
Tourism Employment	132,200	↑ 3.0%	↑ 17.6%
Tourism Wages & Salaries	\$4.5B	↑ 3.8%	↑ 34.3%
Average Tourism Compensation	\$34K	↑ 0.8%	↑ 14.2%
Domestic Visitor Volume	14.6M	↑ 7.8%	NA
International Visitor Volume (2012) ^B	4.3M	↑ 0.5%	↓ 19.9%
Domestic Visitor Expenditures	\$5.7B	↓ 10.4%	NA
International Visitor Expenditures (2012) ^B	\$3.2B	↑ 0.2%	↓ 12.6%

^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 2013 international visitor volume and expenditures data are not available at time of publication of this report. An updated version of this report will be published once final data is available.

^C Percent change from 2007 (not 2002); Pre-2007 real GDP data is not yet available.

Tourism Revenues and GDP

Tourism revenue measures the money received due to tourism activities, by businesses, individuals and governments. Accurate tourism revenues are difficult to obtain, as several sectors contribute to the industry. As of 2013, tourism revenue estimates have been based on a supply-side approach by which BC Stats applies a specific tourism proportion to each sector's revenue, which is calculated directly from annual and monthly business data.

- Total tourism revenue totalled \$13.9 billion in 2013.
 - 33.6% was generated by the accommodation & food services sector, 31.3% by transportation, and 27.2% by retail services.
- In 2012³⁶, accommodation room revenue earned by properties in communities that have utilized the Municipal Regional District Tax (MRDT) in five of the six tourism regions generated \$1.5 billion.
- Tourism-related provincial tax revenue was \$980 million in 2013.
- In 2012³⁷, tourism export revenue totalled \$3.2 billion in 2012.
 - Agriculture & fish products (\$2.7B) and mineral products (\$3.5B) generated similar export revenues, while forest products (\$10.2B) and energy demand (\$8.1B) both remained as larger primary resource commodities for British Columbia.
- Tourism industry contributed \$7.3 billion of added value in gross domestic product in 2013; this is more than other primary resource industries except mining, oil & gas extraction.
 - 36.5% was accounted for by the accommodation & food services sector, 35.1% by transportation, and 10.5% by retail services.
 - Agriculture and fish products contributed (\$1.2B), tourism industry's contribution to GDP (\$7.3B), forestry contributed a quarter of what tourism did (\$1.7B), while mining, oil & gas extraction contributed more to GDP than the tourism industry (\$11.4B).

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.

- 19,254 tourism-related businesses were in operation in British Columbia in 2013.
 - 33.9% had 1 to 4 employees, 21.8% had 5 to 9 employees, 19.9% employed 10 to 19 people, and 16.6% employed 20 to 49 people.
 - 58.2% of businesses were in the Vancouver, Coast & Mountains region, 16.3% on Vancouver Island, and 12.6% in the Thompson Okanagan.
 - 66.7% of establishments were in the accommodation & food sector and 17.8% were of the transportation sector.

³⁶ 2013 accommodation room revenue is not yet available; an updated version of this report will be published when final data is available.

³⁷ 2013 tourism export revenue data is not yet available; an updated version of this report will be published when final data is available.

- 132,200 people were employed in the tourism industry in 2013.
 - 51.1% of employment was in accommodation & food services, 25.0% were in retail services, and 13.2% were in transportation.
 - In 2012³⁸, 63.9% of employment was in the Vancouver, Coast & Mountains region, 13.2% on Vancouver Island, and 11.5% in the Thompson Okanagan.
- \$4.5 billion was paid in wages and salaries in the tourism industry in 2013.
 - 39.7% of wages and salaries was paid in the transportation sector, 37.9% was paid in the accommodation & food sector, and 10.7% went to retail services.
- Average annual compensation in the tourism industry in 2013 was \$34,002.
 - Transportation earned the highest average compensation (\$53.9K), followed by retail services (\$27.5K), and accommodation & food services (\$25.2K).

Domestic and International Overnight Visitors and Expenditures

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

- 14.6 million domestic visitors travelled to/within British Columbia in 2013 and spent \$5.7 billion.
 - 73.2% were British Columbia residents, 18.8% were from Alberta, 4.6% from Ontario, 2.2% from the Prairies, and less than 1% each from either Quebec (0.8%) or the Atlantic (0.3%).
 - 55.3% of expenditures were from British Columbia residents, 26.9% was spent by Albertans, 9.6% by the Ontario market, 4.3% by Prairie visitors, 2.7% by Quebecois, and 1.2% by Atlantic visitors.
- 4.3 million international visitors travelled to British Columbia in 2012³⁹ and spent \$3.2 billion.
 - 68.7% were from the United States (mainly Washington and California), 16.9% were from Asia/Pacific, 11.7% from Europe (mainly the United Kingdom and Germany), 1.3% from Mexico, and 2.7% from other overseas markets.
 - 46.7% of expenditures were from United States visitors, 27.5% was spent by the Asia/Pacific, 20.7% by Europeans, 2.8% by Mexicans, and 2.3% by other overseas markets.

³⁸ 2013 tourism regional employment data is not yet available; an updated version of this report will be published when final data is available.

³⁹ 2013 international overnight visitors and expenditures data is not yet available; an updated version of this report will be published when final data is available.

APPENDIX A

Detailed tables

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

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total revenue (\$ millions)	\$9,665	\$10,558	\$11,278	\$11,997	\$12,706	\$13,115	\$12,373	\$12,914	\$13,097	\$13,458	\$13,949
<i>% change</i>	0.7%	9.2%	6.8%	6.4%	5.9%	3.2%	-5.7%	4.4%	1.4%	2.8%	3.6%
Total provincial taxes (\$ millions)	710	775	825	895	934	903	811	925	1,092	1,143	980
<i>% change</i>	2.2%	9.2%	6.5%	8.5%	4.4%	-3.3%	-10.2%	14.1%	18.1%	4.7%	-14.3%
Tourism export revenue (\$ millions)	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049	\$3,240	\$3,194	\$3,201	n/a
<i>% change</i>	-12.3%	11.0%	-4.7%	-0.7%	2.6%	-1.5%	-10.7%	6.3%	-1.4%	0.2%	n/a
Gross Domestic Product (GDP; \$2007 millions)					\$6,833	\$6,812	\$6,704	\$7,028	\$7,051	\$7,173	\$7,326
<i>% change</i>						-0.3%	-1.6%	4.8%	0.3%	1.7%	2.1%
Total establishments	18,114	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,044	18,533	19,254
<i>% change</i>	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%	0.7%	0.6%	2.7%	3.9%
Tourism employment ('000s)	112.4	114.7	117.8	122.4	126.2	130.1	128.1	127.3	127.4	128.4	132.2
<i>% change</i>	1.4%	2.0%	2.7%	3.9%	3.1%	3.1%	-1.5%	-0.6%	0.1%	0.8%	3.0%
Wages and salaries (\$ millions)	\$3,348	\$3,562	\$3,784	\$4,087	\$4,090	\$4,209	\$4,086	\$4,147	\$4,163	\$4,329	\$4,495
<i>% change</i>	0.8%	6.4%	6.2%	8.0%	0.1%	2.9%	-2.9%	1.5%	0.4%	4.0%	3.8%
International visitors ('000s)	4,844	5,149	4,983	4,951	4,911	4,630	4,175	4,364	4,262	4,282	n/a
<i>% change</i>	-9.4%	6.3%	-3.2%	-0.6%	-0.8%	-5.7%	-9.8%	4.5%	-2.3%	0.5%	n/a

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

Note: 2011, 2012 and 2013 revenue data and associated taxes are preliminary and subject to revision.

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

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

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

Sectors		2003	2004	2005	2006	2007	2008	2009	2010	2011p	2012p	2013p
Revenue (\$ millions)	Accommodation & food services	\$3,427	\$3,815	\$4,155	\$4,452	\$4,692	\$4,637	\$4,285	\$4,456	\$4,371	\$4,420	\$4,689
	Transportation services	\$2,904	\$3,079	\$3,349	\$3,537	\$3,687	\$3,816	\$3,603	\$3,864	\$4,024	\$4,240	\$4,365
	Retail services	\$2,573	\$2,754	\$2,924	\$3,138	\$3,396	\$3,615	\$3,432	\$3,522	\$3,656	\$3,728	\$3,800
	Other services	\$760	\$910	\$851	\$871	\$932	\$1,047	\$1,054	\$1,071	\$1,047	\$1,070	\$1,095
	Overall	\$9,594	\$9,665	\$10,558	\$11,278	\$11,997	\$12,706	\$13,115	\$12,373	\$12,914	\$13,097	\$13,458
% change	Accommodation & food services	-2.5%	11.3%	8.9%	7.1%	5.4%	-1.2%	-7.6%	4.0%	-1.9%	1.1%	6.1%
	Transportation services	1.1%	6.0%	8.8%	5.6%	4.2%	3.5%	-5.6%	7.2%	4.1%	5.4%	2.9%
	Retail services	3.3%	7.0%	6.2%	7.3%	8.2%	6.4%	-5.1%	2.6%	3.8%	2.0%	1.9%
	Other services	6.3%	19.7%	-6.5%	2.4%	7.0%	12.3%	0.7%	1.6%	-2.2%	2.2%	2.3%
	Overall	0.7%	9.2%	6.8%	6.4%	5.9%	3.2%	-5.7%	4.4%	1.4%	2.8%	3.6%

Source: BC Stats.

Note: 2011, 2012 and 2013 revenue data are preliminary and subject to revision.

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

BC Primary Commodities	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Forest industry	\$12,997	\$15,081	\$14,134	\$13,560	\$12,282	\$10,107	\$7,602	\$9,143	\$9,985	\$10,159	\$11,654
<i>Wood products</i>	\$8,239	\$10,062	\$9,485	\$8,776	\$7,164	\$5,408	\$4,127	\$5,106	\$5,706	\$6,175	\$7,746
<i>Pulp and paper products</i>	\$4,758	\$5,019	\$4,649	\$4,784	\$5,118	\$4,699	\$3,475	\$4,037	\$4,279	\$3,985	\$3,908
Agriculture & fish	\$2,371	\$2,416	\$2,371	\$2,422	\$2,332	\$2,484	\$2,424	\$2,524	\$2,512	\$2,721	\$2,918
<i>Agriculture and food</i>	\$1,390	\$1,442	\$1,386	\$1,443	\$1,435	\$1,585	\$1,555	\$1,579	\$1,613	\$1,868	\$2,045
<i>Fish products</i>	\$981	\$974	\$985	\$978	\$897	\$899	\$869	\$945	\$898	\$853	\$873
Metallic mineral products	\$1,535	\$2,089	\$2,705	\$3,581	\$3,430	\$3,336	\$2,503	\$3,163	\$3,492	\$3,456	\$3,833
Energy products	\$4,847	\$4,549	\$7,801	\$6,455	\$6,196	\$9,623	\$6,864	\$7,996	\$10,025	\$8,085	\$7,957
Tourism industry	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049	\$3,240	\$3,194	\$3,201	n/a

Source: BC Stats.

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

Sectors		2007	2008	2009	2010	2011	2012	2013
GDP (\$ millions)	Accommodation & food services	\$2,599	\$2,562	\$2,507	\$2,593	\$2,540	\$2,584	\$2,671
	Transportation services	\$2,262	\$2,269	\$2,227	\$2,445	\$2,513	\$2,562	\$2,572
	Retail services	\$785	\$753	\$732	\$732	\$734	\$752	\$766
	Other services	\$1,187	\$1,228	\$1,238	\$1,259	\$1,265	\$1,275	\$1,317
	Overall	\$6,833	\$6,812	\$6,704	\$7,028	\$7,051	\$7,173	\$7,326
% change	Accommodation & food services		-1.4%	-2.1%	3.4%	-2.0%	1.7%	3.4%
	Transportation services		0.3%	-1.9%	9.8%	2.8%	1.9%	0.4%
	Retail services		-4.1%	-2.8%	0.0%	0.3%	2.5%	1.9%
	Other services		3.5%	0.8%	1.7%	0.5%	0.8%	3.3%
	Overall		-0.3%	-1.6%	4.8%	0.3%	1.7%	2.1%

Source: BC Stats.

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

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

Sectors	2007	2008	2009	2010	2011	2012	2013
Accommodation & food services	100	104	99	104	105	105	107
Transportation services	100	96	101	102	105	105	105
Retail services	100	101	105	105	109	110	110
Other services	100	102	105	105	106	108	110
Tourism industry	100	100	102	104	106	106	107

Source: BC Stats.

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

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

Industries		2007	2008	2009	2010	2011	2012	2013
GDP (\$ millions)	Agriculture	\$1,243	\$1,222	\$1,229	\$1,252	\$1,260	\$1,238	\$1,233
	Forestry	\$1,998	\$1,776	\$1,212	\$1,509	\$1,653	\$1,643	\$1,725
	Mining, oil & gas extraction	\$9,727	\$10,014	\$8,853	\$10,196	\$11,063	\$10,863	\$11,412
	Tourism	\$6,833	\$6,812	\$6,704	\$7,028	\$7,051	\$7,173	\$7,326
Index (2007 = 100)	Agriculture	100	98	99	101	101	100	101
	Forestry	100	89	61	76	83	82	97
	Mining, oil & gas extraction	100	103	91	105	114	112	114
	Tourism	100	100	98	103	103	105	108

Source: BC Stats.

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

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

Business size		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Establishments	1 to 4 employees	8,302	7,995	8,177	8,256	6,179	6,121	6,177	6,208	6,235	6,435	6,525
	5 to 9 employees	3,234	3,266	3,133	3,170	3,886	3,816	3,823	3,830	3,941	4,049	4,205
	10 to 19 employees	3,038	3,007	2,980	2,937	3,538	3,687	3,684	3,576	3,667	3,692	3,840
	20 to 49 employees	2,235	2,408	2,454	2,438	2,691	2,744	2,744	2,949	2,920	2,973	3,201
	50 to 199 employees	1,178	1,221	1,204	1,220	1,230	1,248	1,230	1,226	1,157	1,248	1,322
	200 or more employees	127	138	146	166	138	158	156	154	124	136	161
	Overall	18,114	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,044	18,533	19,254
% change	1 to 4 employees	7.3%	-3.7%	2.3%	1.0%	-25.2%	-0.9%	0.9%	0.5%	0.4%	3.2%	1.4%
	5 to 9 employees	-0.8%	1.0%	-4.1%	1.2%	22.6%	-1.8%	0.2%	0.2%	2.9%	2.7%	3.9%
	10 to 19 employees	1.6%	-1.0%	-0.9%	-1.4%	20.5%	4.2%	-0.1%	-2.9%	2.5%	0.7%	4.0%
	20 to 49 employees	-12.8%	7.7%	1.9%	-0.7%	10.4%	2.0%	0.0%	7.5%	-1.0%	1.8%	7.7%
	50 to 199 employees	-10.5%	3.7%	-1.4%	1.3%	0.8%	1.5%	-1.4%	-0.3%	-5.6%	7.9%	5.9%
	200 or more employees	-1.6%	8.7%	5.8%	13.7%	-16.9%	14.5%	-1.3%	-1.3%	-19.5%	9.7%	18.4%
	Overall	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%	0.7%	0.6%	2.7%	3.9%

Source: BC Stats.

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

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

Sectors		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Establishments	Food & beverage	9,636	9,586	9,603	9,511	9,412	9,545	9,609	9,913	9,984	10,265	10,944
	Accommodation	2,032	2,015	2,027	2,028	1,927	1,927	1,906	1,913	1,896	1,844	1,901
	Transportation	3,494	3,472	3,485	3,563	3,369	3,356	3,389	3,260	3,257	3,350	3,424
	Amusement, gambling & recreation	1,794	1,756	1,746	1,780	1,760	1,751	1,714	1,676	1,695	1,665	1,692
	Performing arts & sports	968	963	1,010	1,089	983	994	984	973	994	1,057	1,079
	Heritage institutions	190	243	223	216	211	201	212	208	208	206	214
	Overall	18,114	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,034	18,387	19,254
% change	Food & beverage	1.5%	-0.5%	0.2%	-1.0%	-1.0%	1.4%	0.7%	3.2%	0.7%	2.8%	6.6%
	Accommodation	-1.9%	-0.8%	0.6%	0.0%	-5.0%	0.0%	-1.1%	0.4%	-0.9%	-2.7%	3.1%
	Transportation	0.3%	-0.6%	0.4%	2.2%	-5.4%	-0.4%	1.0%	-3.8%	-0.1%	2.9%	2.2%
	Amusement, gambling & recreation	-1.6%	-2.1%	-0.6%	1.9%	-1.1%	-0.5%	-2.1%	-2.2%	1.1%	-1.8%	1.6%
	Performing arts & sports	4.2%	-0.5%	4.9%	7.8%	-9.7%	1.1%	-1.0%	-1.1%	2.2%	6.3%	2.1%
	Heritage institutions	-4.0%	27.9%	-8.2%	-3.1%	-2.3%	-4.7%	5.5%	-1.9%	0.0%	-1.0%	3.9%
	Overall	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%	0.7%	0.5%	2.0%	4.7%

Source: BC Stats.

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

Region*		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Establishments	Vancouver Island	2,421	2,991	2,994	2,994	3,014	2,933	2,998	3,014	3,091	3,054	3,111
	Vancouver, Coast & Mtns	9,847	10,190	10,169	10,323	10,346	9,964	10,014	10,122	10,167	10,283	10,634
	Thompson Okanagan	2,037	2,343	2,329	2,302	2,339	2,168	2,231	2,200	2,206	2,248	2,263
	Kootenay Rockies	733	940	903	884	882	854	873	862	860	864	859
	Cariboo Chilcotin Coast	197	368	369	355	365	360	376	357	351	351	336
	Northern BC	1,020	1,259	1,234	1,202	1,201	1,144	1,132	1,131	1,137	1,175	1,184
	<i>Standard geographic coding not available</i>	1,741	23	37	34	40	239	150	128	131	72	0
Overall	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814	17,943	18,034	18,387	
% change	Vancouver Island				0.0%	0.7%	-2.7%	2.2%	0.5%	2.6%	-1.2%	1.9%
	Vancouver, Coast & Mtns				1.5%	0.2%	-3.7%	0.5%	1.1%	0.4%	1.1%	3.4%
	Thompson Okanagan				-1.2%	1.6%	-7.3%	2.9%	-1.4%	0.3%	1.9%	0.7%
	Kootenay Rockies				-2.1%	-0.2%	-3.2%	2.2%	-1.3%	-0.2%	0.5%	-0.6%
	Cariboo Chilcotin Coast				-3.8%	2.8%	-1.4%	4.4%	-5.1%	-1.7%	0.0%	-4.3%
	Northern BC				-2.6%	-0.1%	-4.7%	-1.0%	-0.1%	0.5%	3.3%	0.8%
	Overall	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%	0.7%	0.5%	2.0%

Source: BC Stats.

*2013 tourism establishments' data by regions is not yet available; an updated version of this report will be made available when final data is obtained.

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

Sectors		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Employment	Accommodation & food services	55,700	56,100	57,900	60,800	62,600	64,900	63,600	63,600	63,400	64,600	67,600
	Transportation services	29,300	29,900	31,300	31,800	32,800	33,300	32,800	32,700	32,900	32,800	33,100
	Retail services	15,100	15,500	16,000	16,800	17,600	18,200	17,600	17,200	17,300	17,000	17,400
	Other services	12,500	13,300	12,700	13,000	13,200	13,700	14,100	13,800	13,900	14,000	14,100
	Overall	112,400	114,700	117,800	122,400	126,200	130,100	128,100	127,300	127,400	128,400	132,200
% change	Accommodation & food services	1.3%	0.7%	3.2%	5.0%	3.0%	3.7%	-2.0%	0.0%	-0.3%	1.9%	4.6%
	Transportation services	0.7%	2.0%	4.7%	1.6%	3.1%	1.5%	-1.5%	-0.3%	0.6%	-0.3%	0.9%
	Retail services	4.1%	2.6%	3.2%	5.0%	4.8%	3.4%	-3.3%	-2.3%	0.6%	-1.7%	2.4%
	Other services	0.0%	6.4%	-4.5%	2.4%	1.5%	3.8%	2.9%	-2.1%	0.7%	0.7%	0.7%
	Overall	1.4%	2.0%	2.7%	3.9%	3.1%	3.1%	-1.5%	-0.6%	0.1%	0.8%	3.0%

Source: BC Stats.

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

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

Source: BC Stats.

*2013 tourism employment by region data is not yet available; an updated version of this report will be published when final data is available.

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

Sectors		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Wages & salaries (\$ millions)	Accommodation & food services	\$1,179	\$1,272	\$1,355	\$1,463	\$1,582	\$1,592	\$1,495	\$1,561	\$1,534	\$1,643	\$1,704
	Transportation services	\$1,359	\$1,427	\$1,533	\$1,678	\$1,637	\$1,695	\$1,644	\$1,639	\$1,672	\$1,714	\$1,783
	Retail services	\$341	\$366	\$394	\$426	\$425	\$461	\$458	\$456	\$457	\$465	\$479
	Other services	\$470	\$498	\$502	\$521	\$447	\$460	\$489	\$491	\$501	\$507	\$529
	Overall	\$3,348	\$3,562	\$3,784	\$4,087	\$4,090	\$4,209	\$4,086	\$4,147	\$4,163	\$4,329	\$4,495
% change	Accommodation & food services	1.5%	7.9%	6.5%	8.0%	8.1%	0.6%	-6.1%	4.4%	-1.7%	7.1%	3.7%
	Transportation services	-0.9%	5.0%	7.4%	9.5%	-2.4%	3.5%	-3.0%	-0.3%	2.0%	2.5%	4.0%
	Retail services	5.2%	7.3%	7.7%	8.1%	-0.2%	8.5%	-0.7%	-0.4%	0.2%	1.8%	3.0%
	Other services	1.3%	6.0%	0.8%	3.8%	-14.2%	2.9%	6.3%	0.4%	2.0%	1.2%	4.3%
	Overall	0.8%	6.4%	6.2%	8.0%	0.1%	2.9%	-2.9%	1.5%	0.4%	4.0%	3.8%

Source: BC Stats.

TABLE 13: DOMESTIC VISITOR VOLUME AND YEAR-OVER YEAR CHANGE BY MARKET ORIGIN (2011, 2012 AND 2013)

Market	Volume ('000s)			% change	
	2011	2012	2013	2011-2012	2012-13
British Columbia	9,926	10,469	10,745	5.5%	2.6%
Alberta	2,529	2,151	2,766	-14.9%	28.6%
Ontario	530	563	677	6.2%	20.2%
Quebec	109	116	121	6.4%	4.3%
Prairies	297	278	321	-6.4%	15.5%
Atlantic	52	52	46	0.0%	-11.5%
Overall	13,443	13,624	14,683	1.3%	7.8%

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

TABLE 14: DOMESTIC VISITOR EXPENDITURES AND YEAR-OVER YEAR CHANGE BY MARKET ORIGIN (2011, 2012 AND 2013)

Market	Expenditures (\$ millions)			% change	
	2011	2012	2013	2011-2012	2012-13
British Columbia	\$3,273	\$3,145	\$3,134	-3.9%	-0.3%
Alberta	\$1,240	\$1,056	\$1,523	-14.8%	44.2%
Ontario	\$469	\$550	\$545	17.4%	-1.0%
Quebec	\$128	\$134	\$151	4.4%	13.2%
Prairies	\$193	\$182	\$244	-5.3%	33.6%
Atlantic	\$48	\$67	\$72	39.7%	8.0%
Overall	\$5,350	\$5,134	\$5,670	-4.0%	10.4%

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

TABLE 15: INTERNATIONAL VISITOR VOLUME BY MARKET ORIGIN

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

Source: Statistics Canada: International Travel Survey.

*2013 international visitor volume data is not yet available; an updated version of this report will be published when final data is available.

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

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

Source: Statistics Canada: International Travel Survey.

*2013 international visitor volume data is not yet available; an updated version of this report will be published when final data is available.

TABLE 17: INTERNATIONAL VISITOR EXPENDITURES BY MARKET ORIGIN

Market		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Expenditures (\$ millions)	United States	\$2,047	\$1,839	\$1,925	\$1,722	\$1,727	\$1,671	\$1,567	\$1,424	\$1,519	\$1,468	\$1,495
	Washington	\$493	\$436	\$427	\$402	\$371	\$369	\$365	\$364	\$384	\$402	\$418
	California	\$409	\$327	\$364	\$289	\$329	\$323	\$290	\$246	\$261	\$270	\$284
	Oregon	\$84	\$94	\$89	\$90	\$88	\$94	\$95	\$91	\$97	\$90	\$78
	Arizona	\$67	\$38	\$39	\$60	\$49	\$47	\$38	\$36	\$39	\$34	\$43
	Florida	\$70	\$74	\$82	\$72	\$54	\$46	\$42	\$36	\$55	\$47	\$49
	Texas	\$97	\$65	\$82	\$88	\$92	\$80	\$83	\$77	\$72	\$54	\$75
	Asia/Pacific	\$881	\$666	\$825	\$815	\$824	\$844	\$898	\$786	\$845	\$866	\$879
	Japan	\$283	\$180	\$217	\$236	\$194	\$164	\$138	\$111	\$126	\$125	\$117
	Taiwan	\$89	\$58	\$87	\$75	\$75	\$71	\$49	\$44	\$42	\$48	\$36
	Hong Kong	\$81	\$46	\$74	\$68	\$53	\$58	\$70	\$59	\$64	\$64	\$70
	Australia	\$107	\$110	\$125	\$128	\$144	\$177	\$191	\$172	\$166	\$196	\$200
	South Korea	\$140	\$122	\$120	\$124	\$162	\$138	\$165	\$117	\$150	\$134	\$125
	China	\$58	\$54	\$95	\$68	\$75	\$101	\$121	\$135	\$132	\$140	\$172
	New Zealand	\$20	\$31	\$18	\$10	\$19	\$22	\$48	\$49	\$42	\$29	\$43
	India	\$2	\$1	\$3	\$2	\$3	\$11	\$16	\$18	\$37	\$23	\$11
	Europe	\$630	\$617	\$685	\$744	\$687	\$808	\$807	\$698	\$764	\$731	\$662
	United Kingdom	\$303	\$304	\$343	\$384	\$338	\$392	\$369	\$268	\$263	\$253	\$243
	Germany	\$124	\$122	\$124	\$143	\$126	\$113	\$147	\$156	\$163	\$146	\$139
	Netherlands	\$39	\$43	\$52	\$42	\$50	\$54	\$67	\$57	\$61	\$49	\$51
	France	\$19	\$25	\$22	\$22	\$26	\$37	\$26	\$30	\$44	\$54	\$39
Mexico	\$58	\$42	\$75	\$74	\$79	\$83	\$96	\$89	\$67	\$66	\$90	
Other overseas	\$48	\$49	\$58	\$43	\$60	\$59	\$46	\$53	\$45	\$63	\$76	
TOTAL INTERNATIONAL	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049	\$3,240	\$3,194	\$3,201	

Source: Statistics Canada: International Travel Survey.

*2013 international visitor expenditure data is not yet available; an updated version of this report will be published when final data is available.

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

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

Source: Statistics Canada: International Travel Survey.

*2013 international visitor expenditure data is not yet available; an updated version of this report will be published when final data is available.