



The Value of Tourism in British Columbia

Trends from 1999 to 2009

Ministry of Jobs, Tourism and Innovation
April 2011



TourismBC

MAP OF BRITISH COLUMBIA TOURISM REGIONS

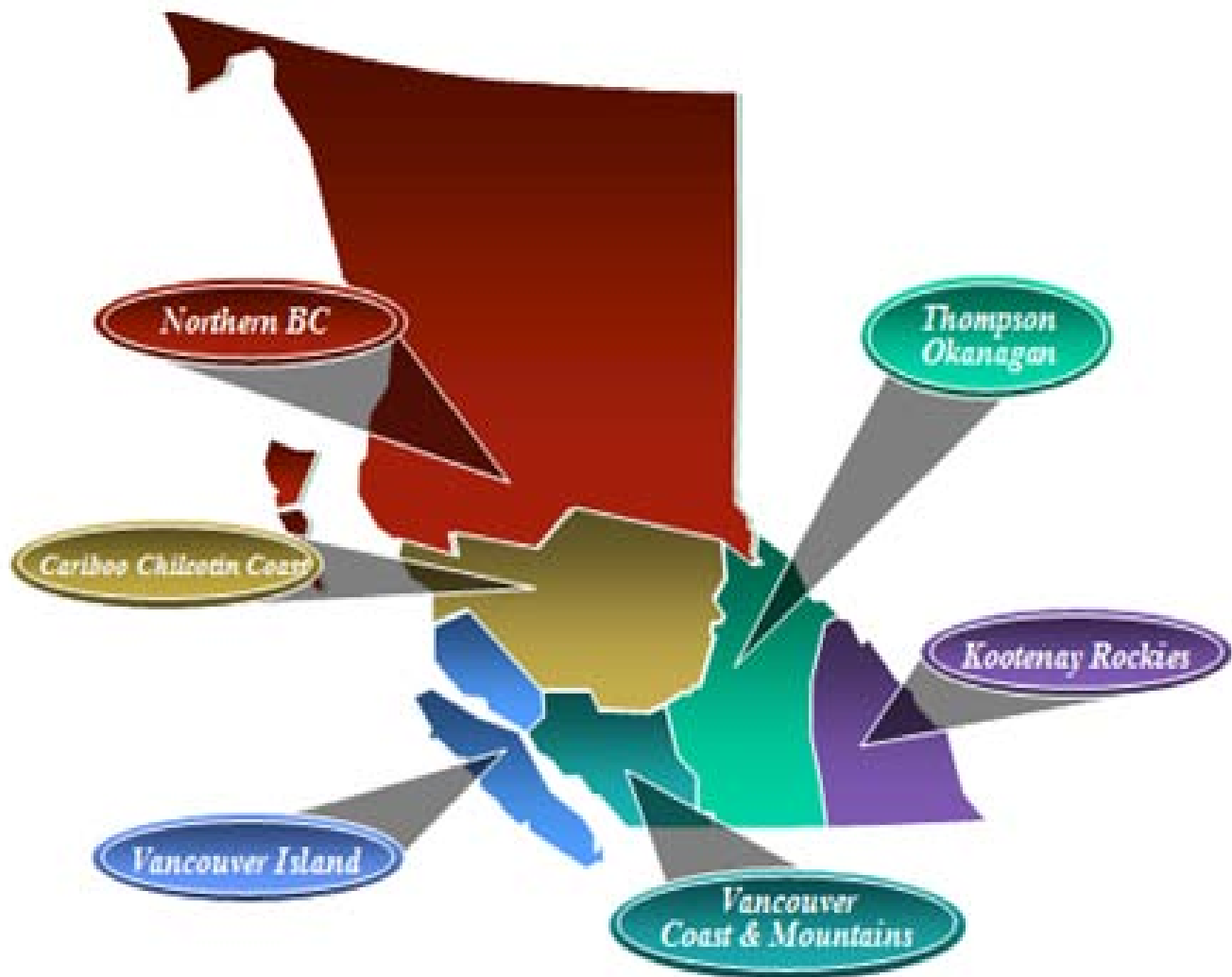


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Cover photo: Autumn in the Thompson Okanagan, available from the Tourism British Columbia Image Bank: www.imagebank.tourismbc.net

1. Overview

This document presents 10 years of data about the economic value of tourism to British Columbia. Strong tourism growth was demonstrated between 1999 and 2007, but was affected in 2008 and 2009 by the worldwide downturn in the economy. The tourism industry started its recovery in 2010, and is expected to continue to rebound in future years.

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 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 2009, the tourism industry generated \$12.7 billion in revenue, a decrease of 6% from 2008 but a 48% increase since 1999.
- The accommodations sector – which includes hotels, motels, bed & breakfasts, and other lodgings – generated over \$1.7 billion in room revenue in 2009, a 12% decrease from 2008 but a 31% increase since 1999.
- In 2009, tourism generated \$863 million in provincial tax revenue (income, hotel, gas, and other taxes), a decline of 7% compared with 2008 but a 19% increase since 1999.
- The tourism industry generated \$3 billion in export revenues in 2009, 11% below 2008 levels and 12% below 2000.
- Tourism generated a direct contribution to gross domestic product of \$6.3 billion (2002 constant dollars), a 2% decrease from 2008 but a 24% increase since 1999.
- There were 17,814 tourism-related business establishments operating in BC in 2009. The number of establishments was about the same in 2009 as in 2008 but has grown slightly since 1999 (1%).
- In 2009, the tourism industry employed 128,600 people, a decrease of 2% from 2008 but a 26% increase since 1999.
- Total tourism wages and salaries were \$4.7 billion in 2009, an increase of 1% over 2008 and 52% since 1999.

SUMMARY OF ECONOMIC INDICATORS OF TOURISM INDUSTRY IN BC

	2009	% Change from 2008	% Change from 1999
Tourism Revenue	\$12.7B	-6%	+48%
Accommodation Room Revenue	\$1.7B	-12%	+31%
Provincial Tax Revenue	\$863M	-7%	+19%
Export Revenue	\$3B	-11%	-12% (% change from 2000)
Gross Domestic Product (GDP; 2002 constant dollars)	\$6.3B	-2%	+24%
Tourism-Related Businesses	17,814	0%	+1%
Tourism Employment	128,600	-2%	+26%
Tourism Wages & Salaries	\$4.7B	+1%	+52%

Key highlights (continued):

- There were almost 15 million overnight visitors to BC in 2009 (about 11 million were from Canada, or 72%; and 4 million from other countries, or 28%). Of travellers from Canada, BC residents made up the largest share of overnight visitor volume (72%) and expenditures (53%). However, international visitors account for nearly 40% of total visitor expenditures, despite their smaller numbers.
- The number of overnight visitors from Canada increased by almost 7% in 2009 compared with 2008, while international visitor volume declined by almost 10% in 2009 from 2008. International visitors spent 11% less in 2009 than in 2008, and Canadian visitors, 2% less.

SUMMARY OF VISITOR VOLUME AND EXPENDITURES OF TOURISM INDUSTRY IN BC

	2009	% Change from 2008	% Change from 2006
Overnight Visitor Volume (Total)	14.8M	+2%	+2%
Canadian Visitors	10.6M	+7%	+11%
International Visitors	4.2M	-10%	-16%
Overnight Visitor Expenditures (Total)	\$7.8B	-6%	+3%
Canadian Visitors	\$4.7B	-2%	+14%
International Visitors	\$3.1B	-11%	-10%

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 costs of supplies and services used to produce goods or services are subtracted from total revenues. This measure highlights the specific contribution the tourism industry makes to the BC economy.

Previously, it has been difficult to estimate tourism revenues accurately 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 (TSA¹). 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 1999 and 2009. 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

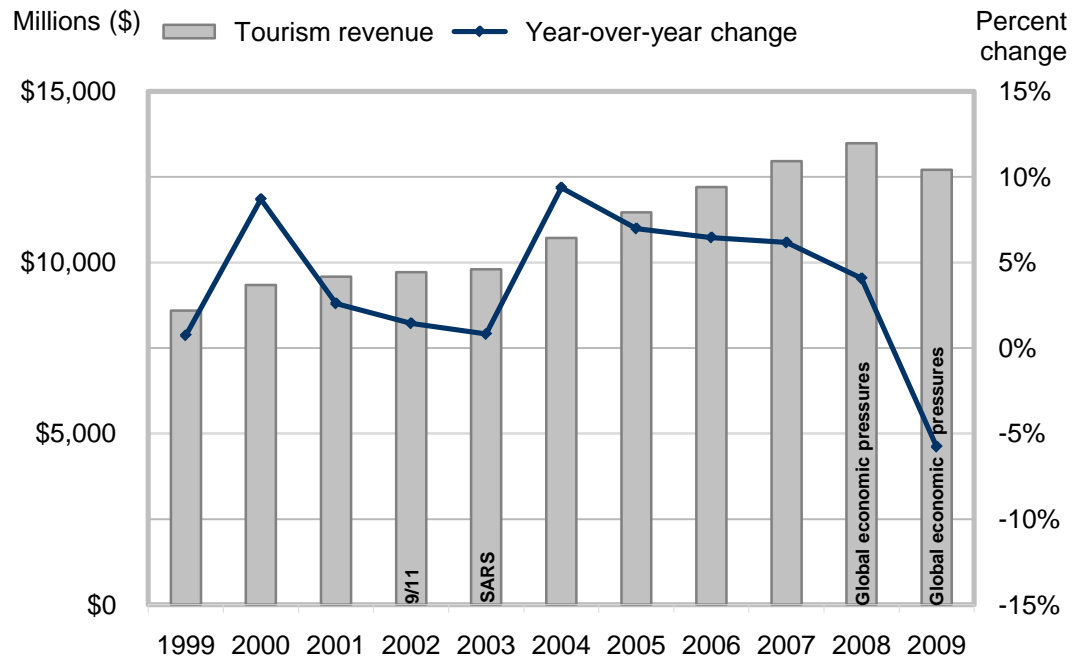
The tourism industry generated \$12.7 billion in 2009², a decrease of 6% from 2008 (Figure 1). Since 1999, total tourism revenues have grown 48%. Tourism revenues have grown every year between 1999 and 2008, but growth has varied considerably, cycling between highs of 9% and lows of about 1%. A decline of tourism revenues in 2009 was caused by numerous factors, including the global

¹ A tourism satellite account is a system of measuring the impact of tourism on the economy, it is a framework that accounts for the impacts across all industries which, in turn, reveals the total direct impact on the economy.

² Source: BC Stats, Tourism Sector Monitor, August 2010 (<http://www.bcstats.gov.bc.ca/pubs/tour/tsm1008.pdf>).

economic recession, the economic uncertainty in the United States, and the appreciation of the Canadian dollar.

FIGURE 1: OVERALL TOURISM REVENUE AND YEAR-OVER-YEAR CHANGE (1999 TO 2009)



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.

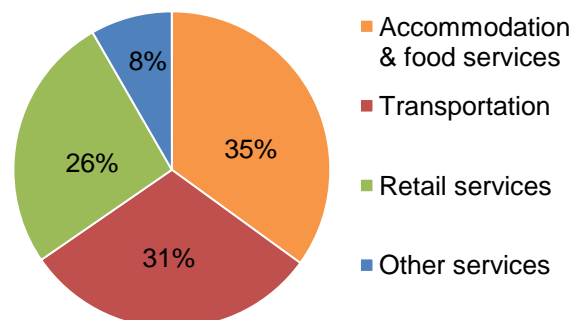
However, for business planning purposes, it is important to understand the relative importance of different markets of origin in generating revenue for the tourism industry. It is also important to have information on the extent to which growth rates differ by market of origin – as well as data on visitor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

Revenue by tourism sector

In 2009, transportation, accommodation and food services generated a total of two-thirds of tourism revenues, while retail services accounted for another quarter of the revenue (Figure 2Error! Reference source not found.).

Other tourism-related services –

FIGURE 2: SHARE OF TOURISM REVENUE (2009)



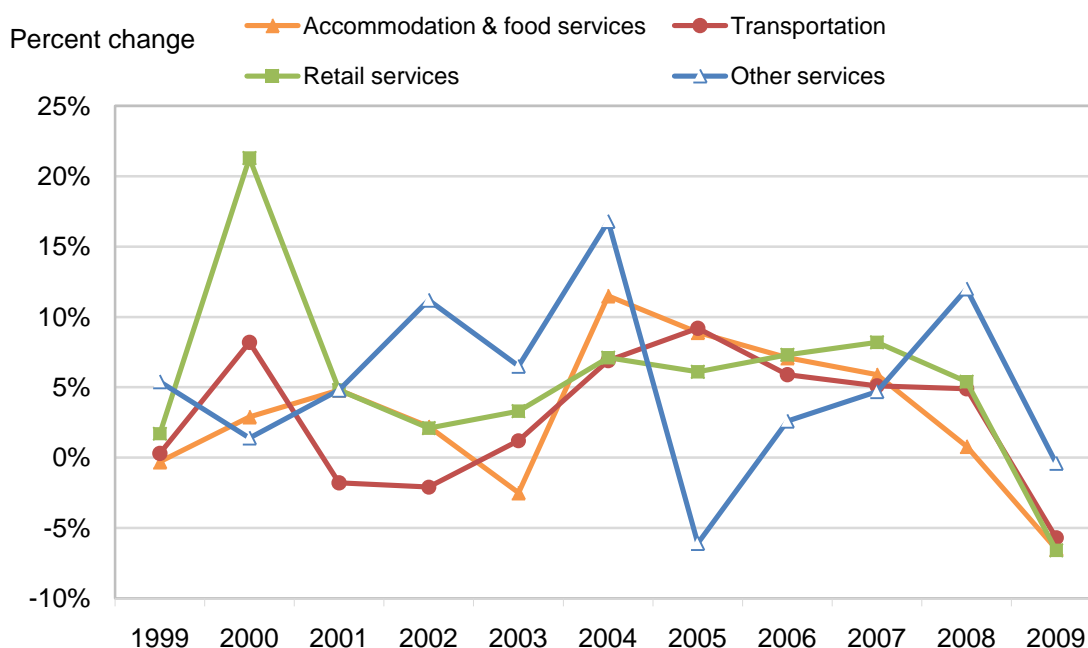
which include vehicle rentals, tourism-related recreation and entertainment, and vacation homes – accounted for less than 10% of total revenues.

Since 1999, transportation, accommodation and food services have grown by about 40%, while retail services and other tourism services experienced stronger growth over the 10-year period (74% and 65%, respectively).

While the share of total revenue generated by each sector³ has remained relatively constant from 1999 to 2010, annual growth rates have fluctuated considerably since 1999 (Figure 3).

The transportation services sector lost ground in 2001 and 2002, but recovered to an average 7% annual growth from 2004 to 2008. Revenues from transportation services fell 6% in 2009. Accommodation and food services contracted in 2003, rebounded with 11% growth in 2004 but has slid since 2006, with a drop of 7% in 2009. Retail services grew 21% in 2000 and has averaged 7% growth from 2004 to 2008; however, revenues dropped by 7% in 2009. The rise and fall of other tourism-related services has cycled over the years, with a large decline in 2004/05. In 2009, revenues for other tourism-related services remained largely unchanged.

FIGURE 3: REVENUE GROWTH RATES BY TOURISM SECTOR (1999 TO 2009)



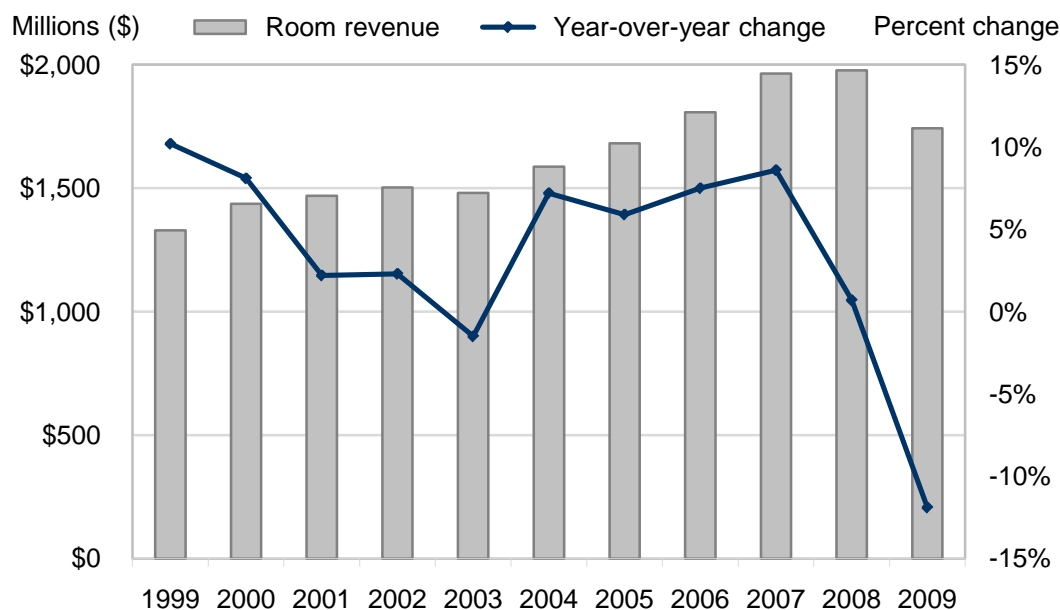
Accommodation room revenue

In 2009, the accommodations sector – which includes hotels, motels, bed & breakfasts, and other lodgings – generated more than \$1.7B in room revenue, a 31% increase in revenue since 1999 (Figure 4).

³ Two different terms are used to refer to industries in this document. 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 fell in 2003, related to the slowdown in visitation due to Severe Acute Respiratory Syndrome (SARS). Between 2004 and 2007, room revenue averaged 7% annual growth, but grew less than 1% in 2008 and dropped 12% in 2009 as a result of the global economic downturn.

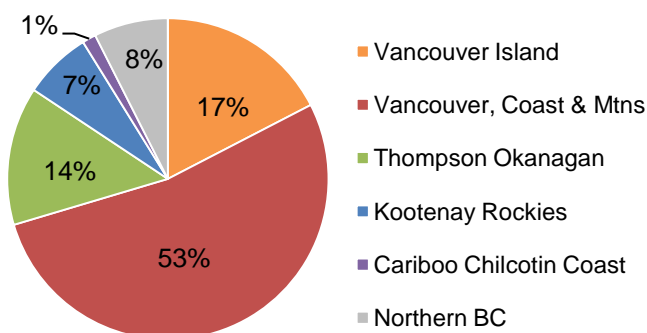
FIGURE 4: ACCOMMODATION REVENUE AND YEAR-OVER-YEAR CHANGE (1999 TO 2009)



Accommodation room revenue by region

FIGURE 5: REGIONAL SHARE OF ROOM REVENUE (2009).

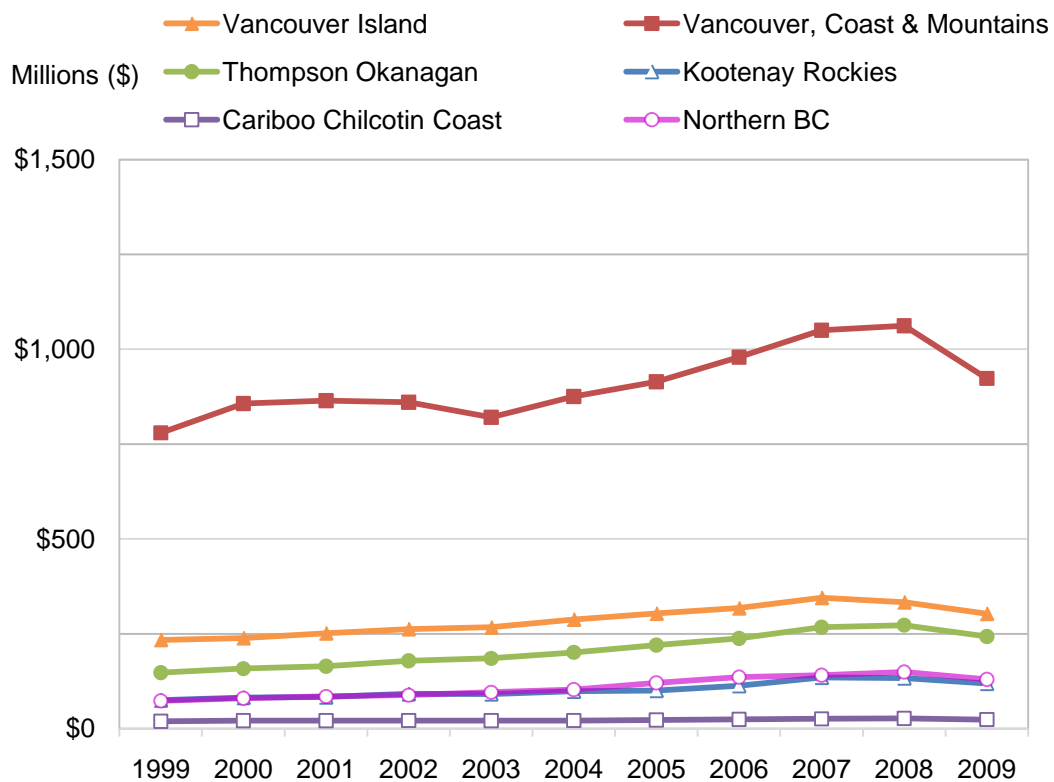
The Vancouver, Coast and Mountains region⁴ generates over half of BC's room revenue, followed by Vancouver Island (17%) and the Thompson Okanagan (14%; Figure 5). The regional shares of room revenue have been fairly constant over the 10-year period.



Since 1999, room revenue has increased in each region (Figure 6). From 1999 to 2009, the Vancouver Island and Vancouver, Coast and Mountains regions posted nearly 30% and 20% growth, respectively. While the Cariboo Chilcotin Coast saw growth of 20%, room revenue in the Northern BC, the Kootenay Rockies and the Thompson Okanagan nearly doubled (about 80% growth in Northern BC and nearly 60% and 65% growth in the Kootenay Rockies and the Thompson Okanagan).

⁴ See page 1 for map of tourism regions in British Columbia.

FIGURE 6: TOURISM ROOM REVENUES BY REGION (1999 TO 2009).



In 2009, room revenues for all six tourism regions dropped between 9% and 13% as a result of the global economic downturn. The largest declines were in Vancouver, Coast & Mountains and Northern BC, while Vancouver Island experienced the smallest drop in room revenues.

During the economic recession in 2008, five of the six regions experienced either modest growth or declines in room revenue, while Northern BC experienced higher growth in 2008. Most of the growth in Northern BC in 2008 occurred in the Peace River Regional District.

While room revenue has increased in each region from 1999 to 2009, 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 growth rates or drops in 2003, except Northern BC, which posted 9% 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 regional districts.

FIGURE 7A: YEAR-OVER-YEAR CHANGE IN REGIONAL ROOM REVENUE (1999 TO 2009) FOR THE VANCOUVER ISLAND, VANCOUVER, COAST AND MOUNTAINS AND THOMPSON OKANAGAN TOURISM REGIONS.

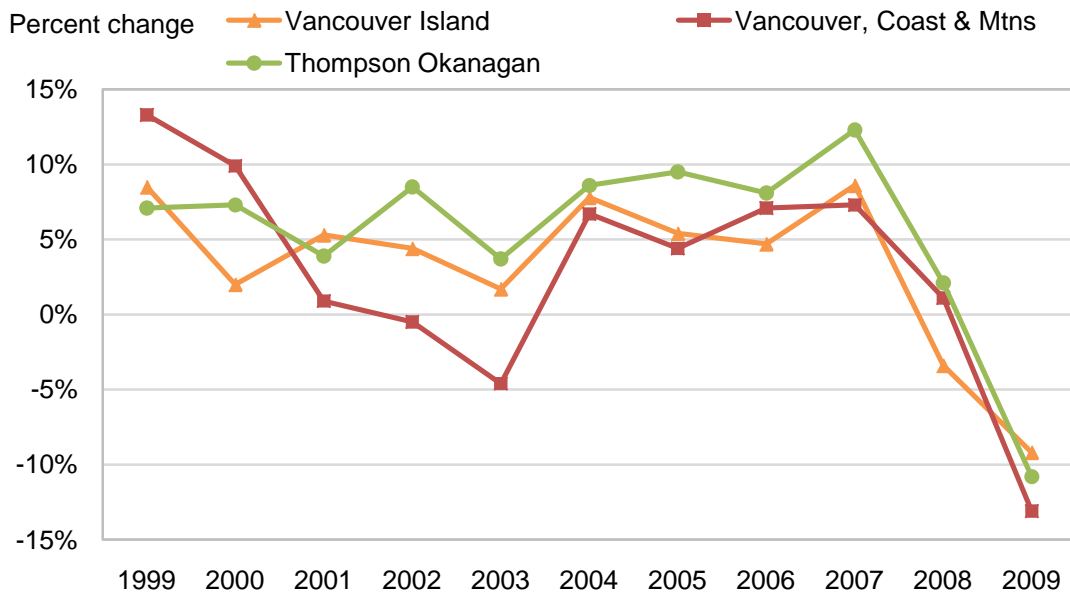
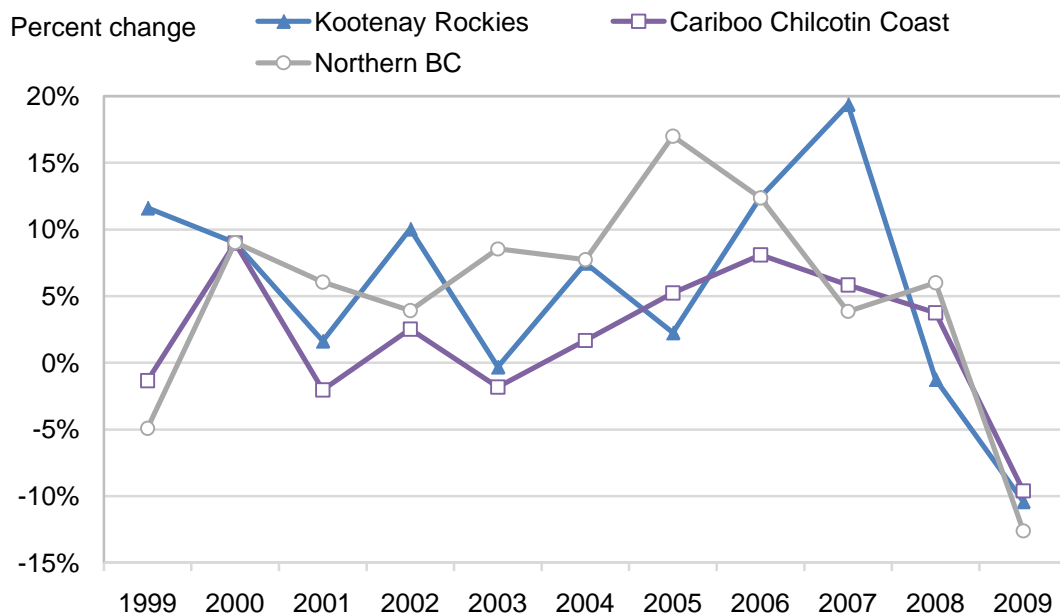


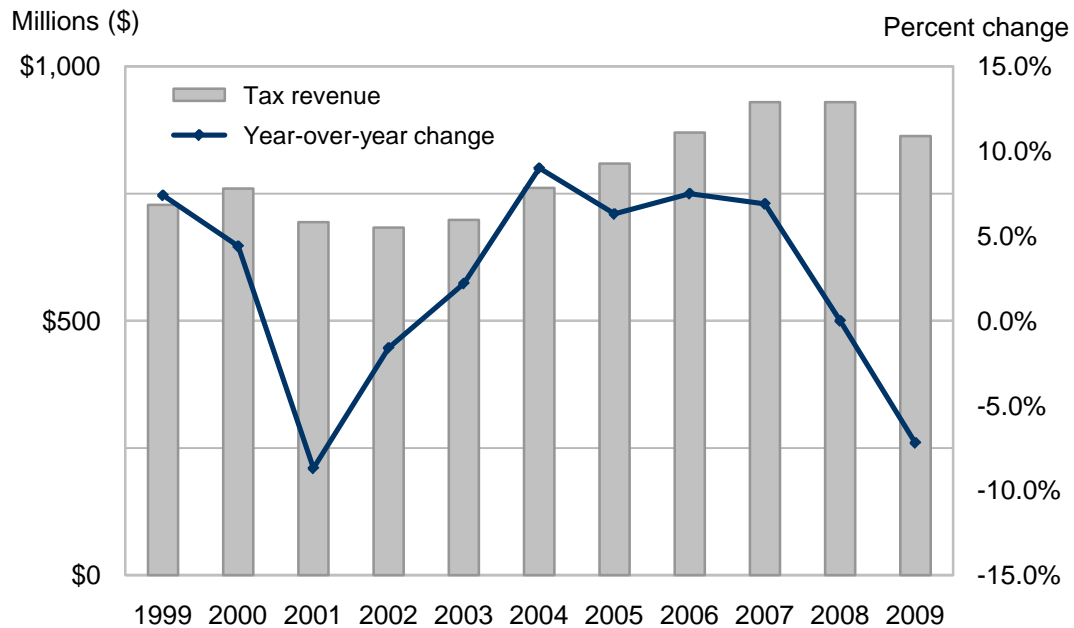
FIGURE 7B: YEAR-OVER-YEAR CHANGE IN REGIONAL ROOM REVENUE (1999 TO 2009) FOR THE KOOTENAY ROCKIES, NORTHERN BC AND CARIBOO CHILCOTIN COAST TOURISM REGIONS.



Tax revenues

In 2009, the tourism industry generated \$863 million in revenue from provincial taxes, which include income, hotel, gas and other taxes (Figure 8). Since 1999, tax revenue has increased 19%. 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 remained flat in 2008 and declined by 7% in 2009.

FIGURE 8: TOURISM-RELATED TAX REVENUE AND YEAR-OVER-YEAR CHANGE (1999 TO 2009).



Export revenues

The tourism industry generated \$3 billion in export revenues in 2009 (Figure 9).⁵ Export revenues are generated from the sale of tourism products and services to international visitors. Tourism export revenues varied considerably between 2000 and 2009. The revenues dropped in 2009 (11%) as a result of the global economic downturn (a 12% decline since 2000).

Between 2000 and 2009, the size of the tourism industry's export revenues was similar to exports of agriculture and fish products, and mineral products between when compared to forest products and the energy sector (Figure 10). While agricultural exports have remained relatively steady, mineral exports rose nearly 20% and tourism exports dropped by 15% since 2004.

Forest products generated the largest export revenues, but fell 50% between 2004 and 2009 (down 54% between 2000 and 2009) due to the weakening housing market, low timber prices, softwood lumber duties and the weakening pulp market.⁶

⁵ Pre-2000 export data for the tourism industry consistent with the current data series were not available at the time of publication.

⁶ Ministry of Forests and Range 2009/10-2011/12 Service Plan Update

On the other hand, energy exports have risen 48% since 2004 (up 10% since 2000) as energy demand increased over the last decade.

FIGURE 9: TOURISM EXPORT REVENUES (2000 TO 2009).

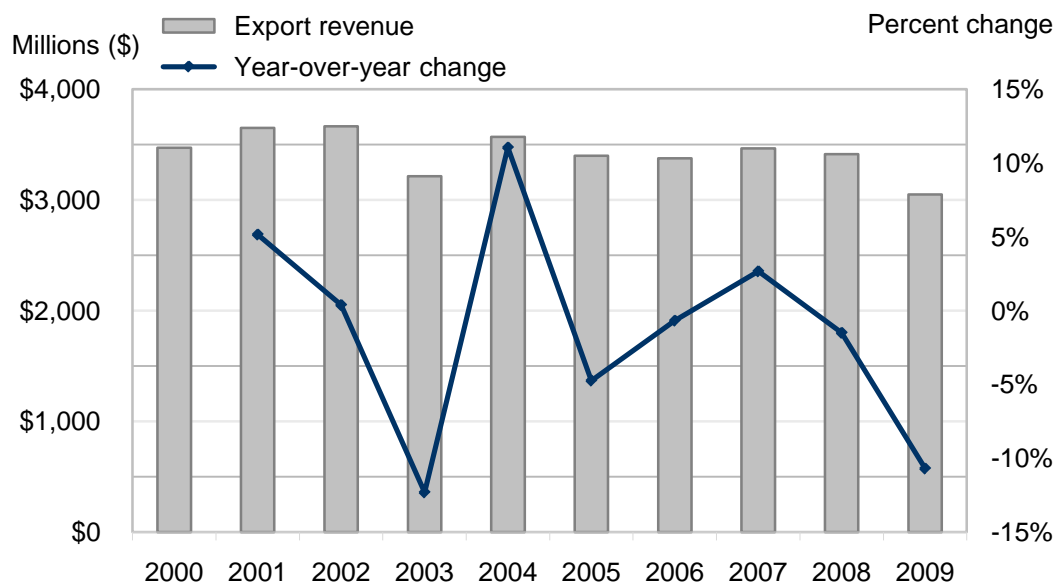
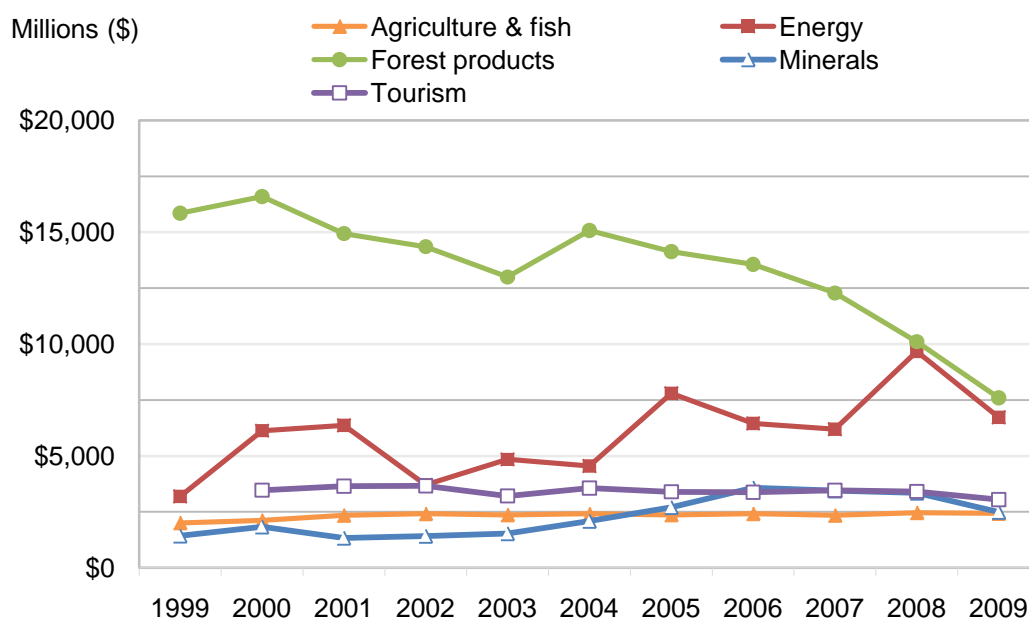


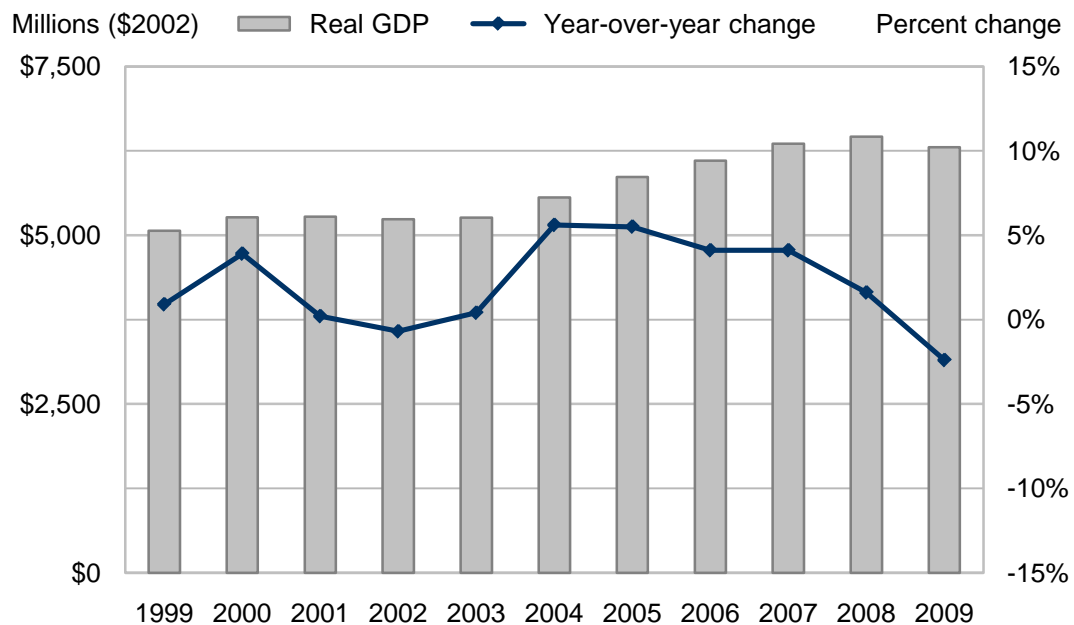
FIGURE 10: EXPORT REVENUES FROM BC'S PRIMARY RESOURCE COMMODITIES (1999 TO 2009).



GROSS DOMESTIC PRODUCT (GDP)

While the tourism industry generated \$12.7 billion in total revenue, it contributed \$6.3 billion of added value to the economy in 2009, measured using GDP (in 2002 constant dollars), which represents a decline of 2% compared with 2008. Since 1999, tourism GDP has increased by 24% (Figure 12).

FIGURE 12: TOURISM GROSS DOMESTIC PRODUCT AND YEAR-OVER-YEAR CHANGE (1999 TO 2009).

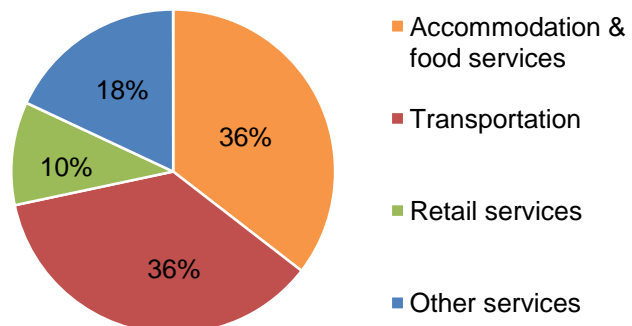


GDP by tourism sectors

FIGURE 13: SHARE OF 2009 GDP BY TOURISM SECTORS.

In 2009, accommodation and food services and transportation services accounted for over 70% of GDP (based on 2002 constant dollars, Figure 13).

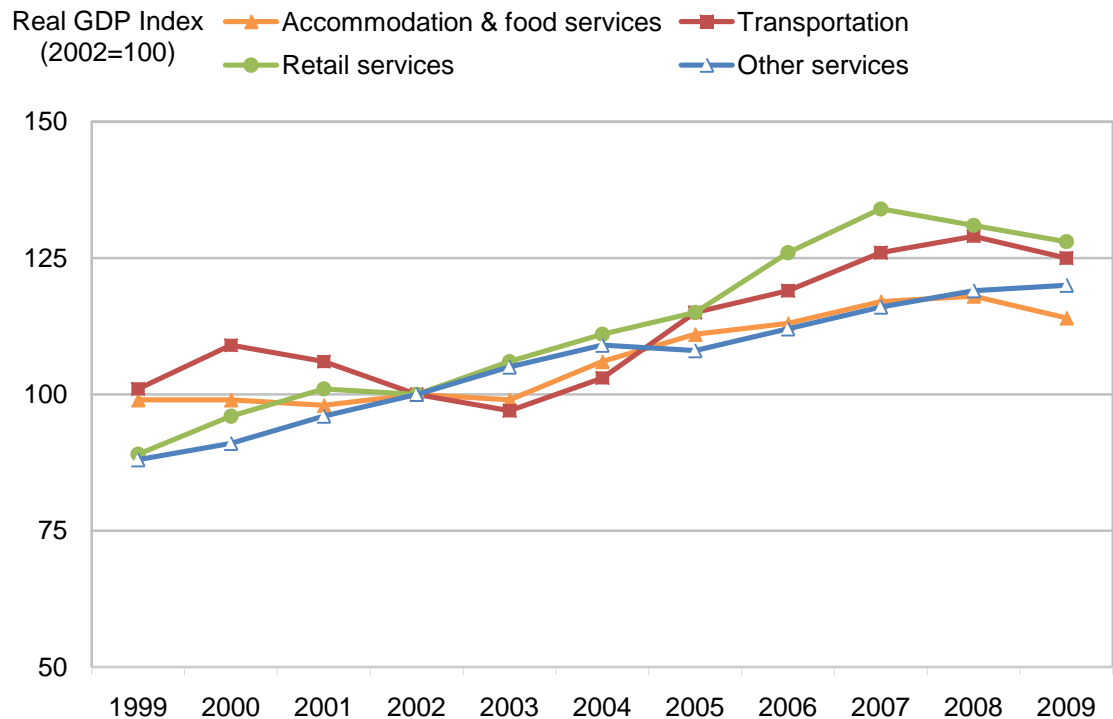
While retail services earned over a quarter of revenue, this group accounted for just 10% of GDP. By comparison, other tourism services accounted for 18% of GDP, but only 8% of revenue.



Except for 2005, GDP in other tourism services showed strong growth (Figure 14). Accommodation and food services lost ground in 2003, and have since rebounded except for 2009 (down 4%). Retail services made the largest gains, with strong growth from 2005 to 2007. GDP growth in transportation services increased

strongly in the early 2000 as demand for transportation and fuel prices increased, but growth has slowed since 2007 as the economic pressures mounted.

FIGURE 14: COMPARING REAL GDP FOR TOURISM SECTORS (1999 TO 2009).



Industry comparisons

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

From 1999 to 2009, the GDP for the tourism, and mining and oil & gas extraction industries have both increased 25%, while agriculture dropped by 1% and forestry declined by 30%.

Tourism is the only primary industry that has maintained steady growth in real GDP from 2002 to 2008, dropping slightly in 2009 (-2%, Figure 16). In 2009, the real GDP of the agriculture, forestry and mining and oil and gas extraction industries were 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 (1999 TO 2009).

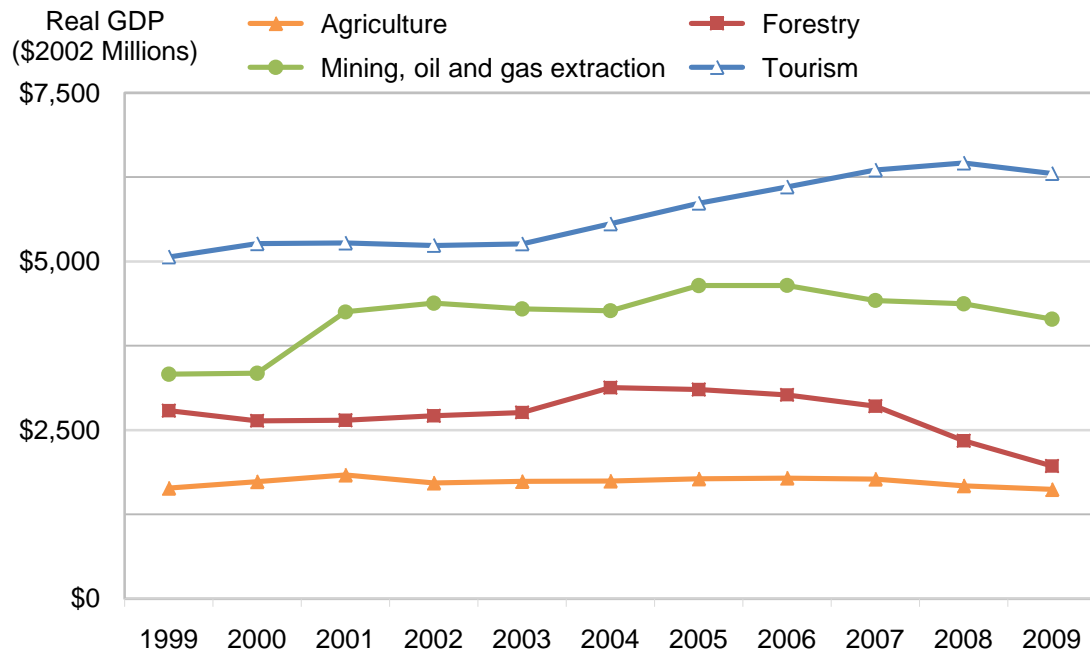
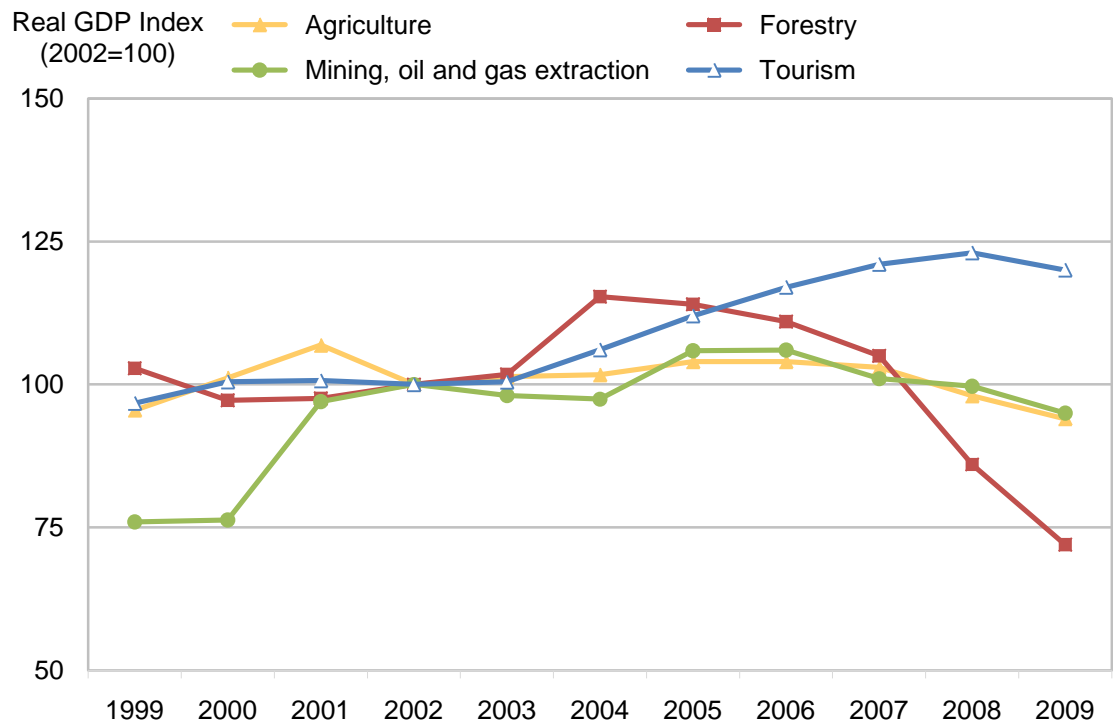


FIGURE 16: COMPARING REAL GDP INDEX BY PRIMARY RESOURCE INDUSTRY (1999 TO 2009).



2. Business and people

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

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

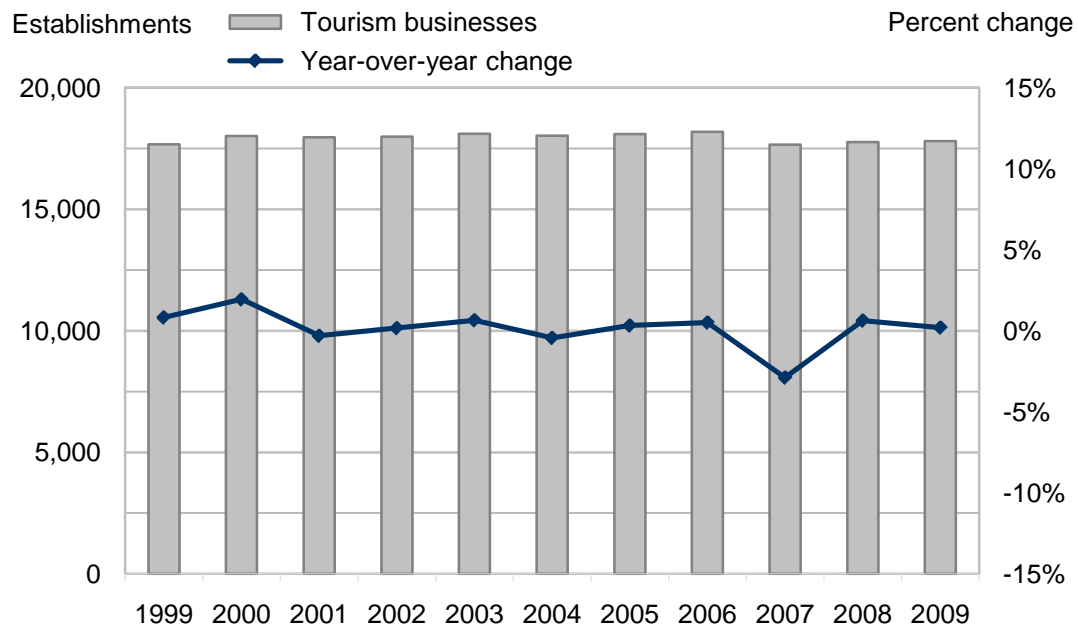
TOURISM BUSINESSES

Total establishments

In 2009, there were 17,814⁸ tourism-related business establishments operating in BC (Figure 17). However, the number of tourism businesses grew less than 1% since 1999.

Each year, tourism businesses are established and closed. While there was a net increase of 344 businesses between 1999 and 2000, there was a 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 businesses⁹, which was softened by net increases of 112 businesses in 2008 and 40 businesses in 2009.

FIGURE 17: COUNT AND YEAR-OVER-YEAR CHANGE OF BC TOURISM BUSINESSES (1999 TO 2009).



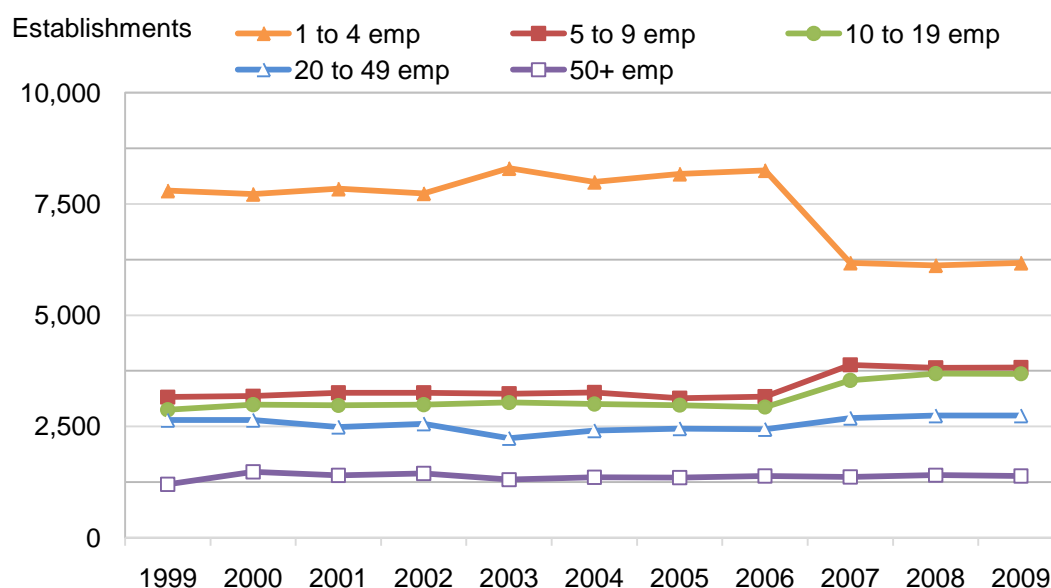
⁸ Source: BC Stats, Tourism Sector Monitor, May 2010 (<http://www.bcstats.gov.bc.ca/pubs/tour/tsm1005.pdf>).

⁹ The decrease in the number of tourism establishments in 2007 was attributed to the introduction of new "inactivation rules" in the redesigned Business Register to detect inactive businesses as early as possible, which results in more accuracy in reflecting the operating structure of businesses (<http://ivt.crepug.qc.ca/industries/documentation/brengl3.pdf>).

The 2007 decrease in the number of tourism establishments occurred primarily among very small businesses (one to four employees), which account for a third of all tourism establishments. The number of very small businesses shrank by 2,077, a 25% decrease from the previous year¹⁰ (Figure 18).

However, the number of slightly larger businesses (five to nine and 10 to 19 employees) grew by 1,317, a 22% increase. While some very small businesses were inactive or closed in 2007, others may have grown larger to meet customer demands, before the effects of the economic slowdown were felt. The number of tourism businesses of all sizes was about the same in 2007, 2008 and 2009.

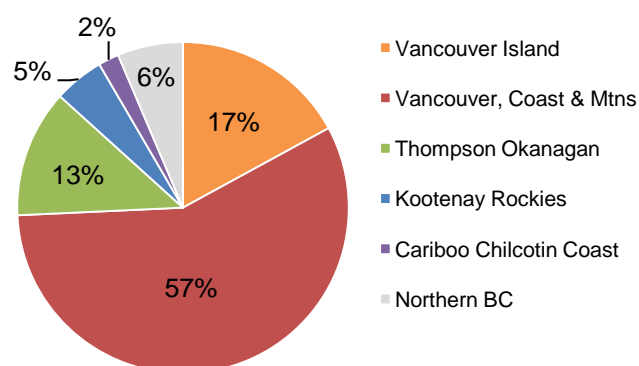
FIGURE 18: COUNT OF TOURISM BUSINESSES BY SIZE (NUMBER OF EMPLOYEES) (1999 TO 2009).



Businesses by region

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).

FIGURE 19: TOURISM BUSINESSES BY REGION (2009)



¹⁰ The decrease in the number of tourism establishments with one to four employees in 2007 was attributed to the introduction of new "inactivation rules" in the redesigned Business Register to detect inactive businesses as early as possible, which results in more accuracy in reflecting the operating structure of businesses (<http://ivt.crepug.qc.ca/industries/documentation/brengl3.pdf>).

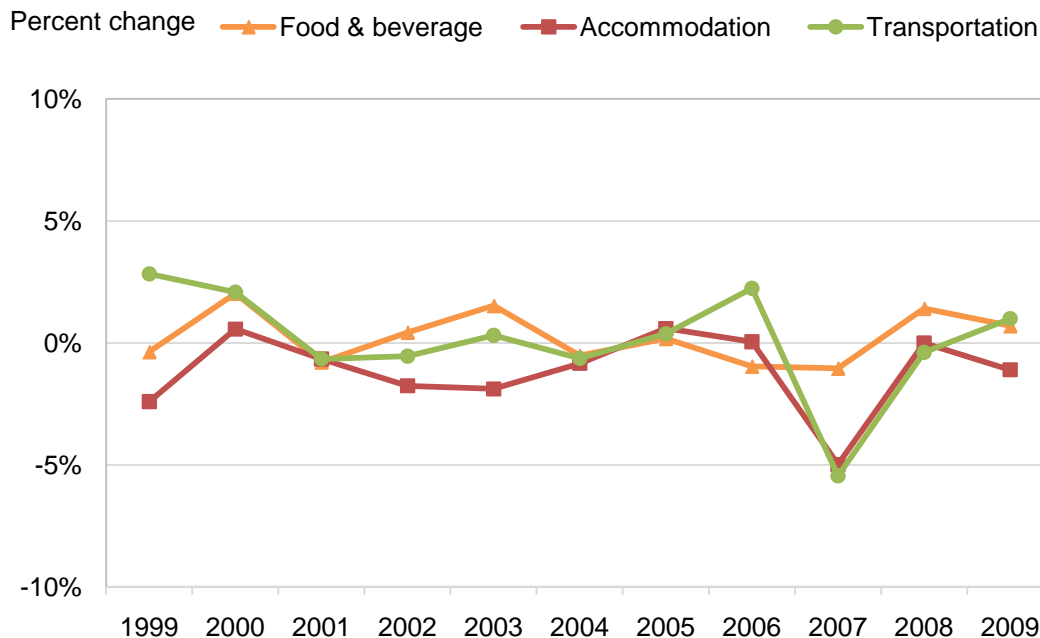
Since 1999, the number of tourism establishments has increased by 21% in the Vancouver Island region, 7% in Vancouver Coast & Mountains and 8% in Thompson Okanagan. The Cariboo Chilcotin Coast region saw a 65% net increase in the number of tourism businesses. Tourism businesses grew 21% in the Kootenay Rockies and 4% in Northern BC.

Businesses by sector

In 2009, the accommodation and food services sector accounted for 65% of tourism-related establishments in BC, and the transportation sector accounted for nearly 20%.¹¹ Within the accommodation and food services industry group, the split is 83% food and beverage businesses and 17% accommodation businesses.

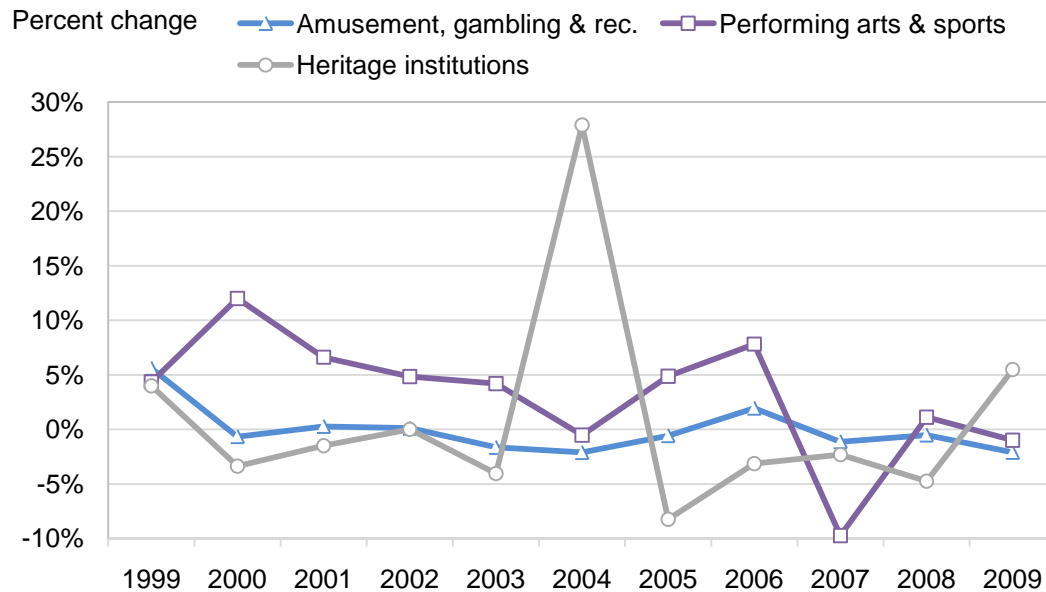
In 2007, all tourism sectors experienced a net decrease in the number of businesses, but the impact was less pronounced in the food and beverage sector, amusement, gambling and recreation sector, and heritage institutions (Figure 20). The number of heritage institutions leapt 28% in 2004, most likely due to the provincial government devolving the management of 28 heritage properties. The accommodation and food services sector experienced a net increase of 133 in the number of businesses in 2008, and the performing arts and sports sector saw an increase of 11 businesses. The numbers were slightly down for the other sectors.

FIGURE 20A: YEAR-OVER-YEAR CHANGE IN TOURISM BUSINESSES FOR THE FOOD & BEVERAGE, ACCOMMODATION AND TRANSPORTATION SECTORS (1999 TO 2009).



¹¹ The data on tourism-related establishments is based on the Statistics Canada Business Register. This register uses slightly different coding for sectors, compared with the revenue and GDP data.

FIGURE 20B: YEAR-OVER-YEAR CHANGE IN TOURISM BUSINESSES FOR THE AMUSEMENT, PERFORMING ARTS & SPORTS AND HERITAGE SECTORS (1999 TO 2009).



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 each of the industries.

In 2009, the BC tourism industry employed 128,600, a 2% decrease from 2008 (Figure 21)¹². Since 1999, the number of people employed in the tourism industry has grown by 26%.

In 1999, tourism employment experienced a slight decline, and then grew 7% in 2001. The events of Sept. 11, 2001, interrupted this growth, 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 1999, the number of employees has grown 26% in accommodation and food services, and 37% in retail services (Figure 22). Employment in transportation grew by 19%, and other services went up 36%.

¹² 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 industrial coding estimates are available; 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 (1999 TO 2009).

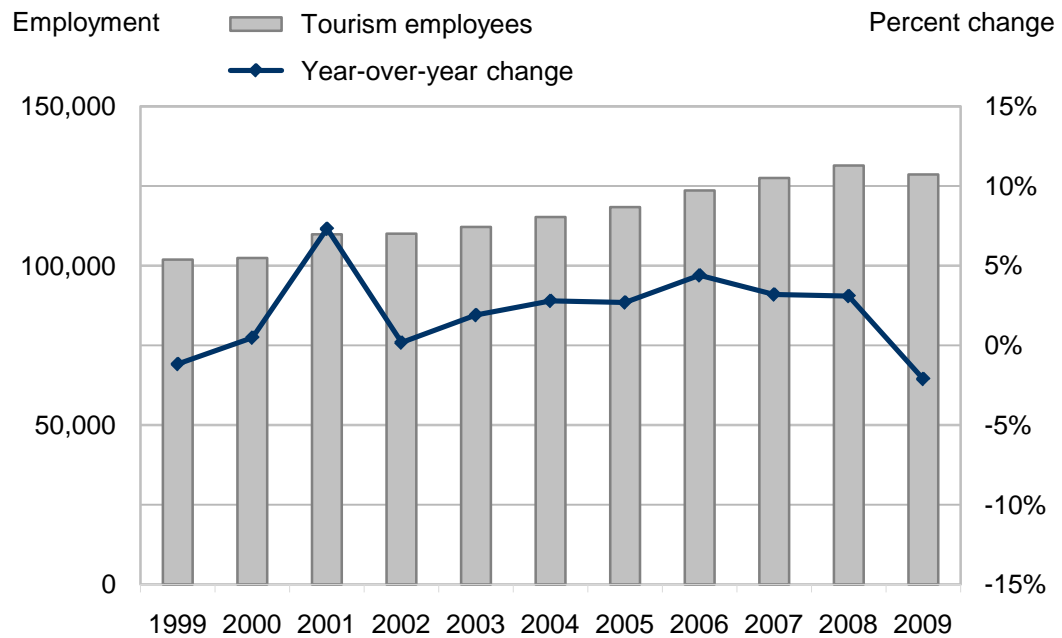
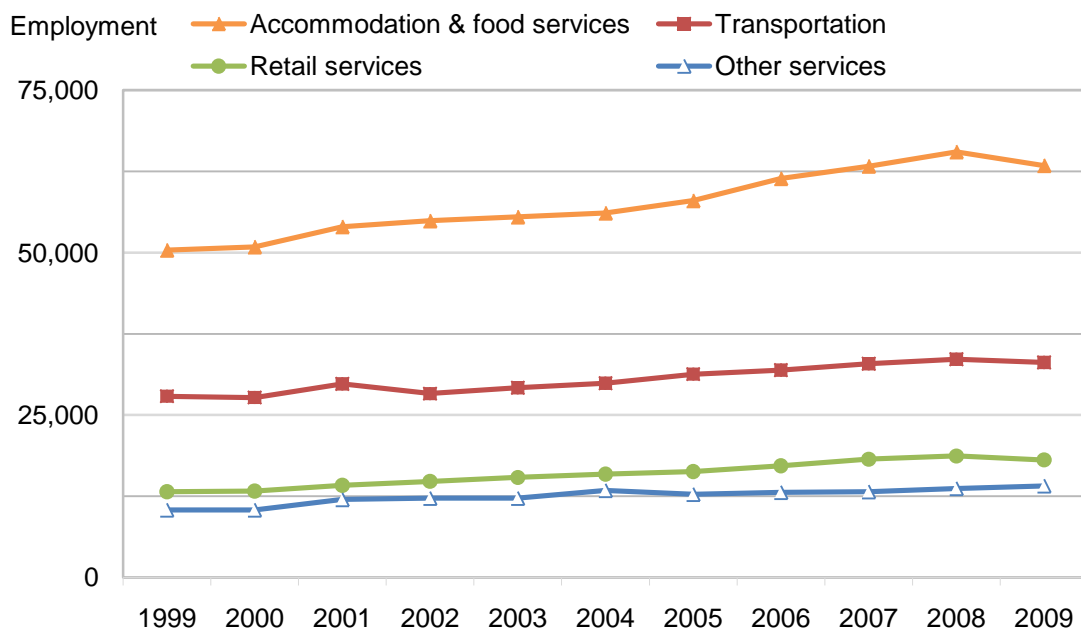


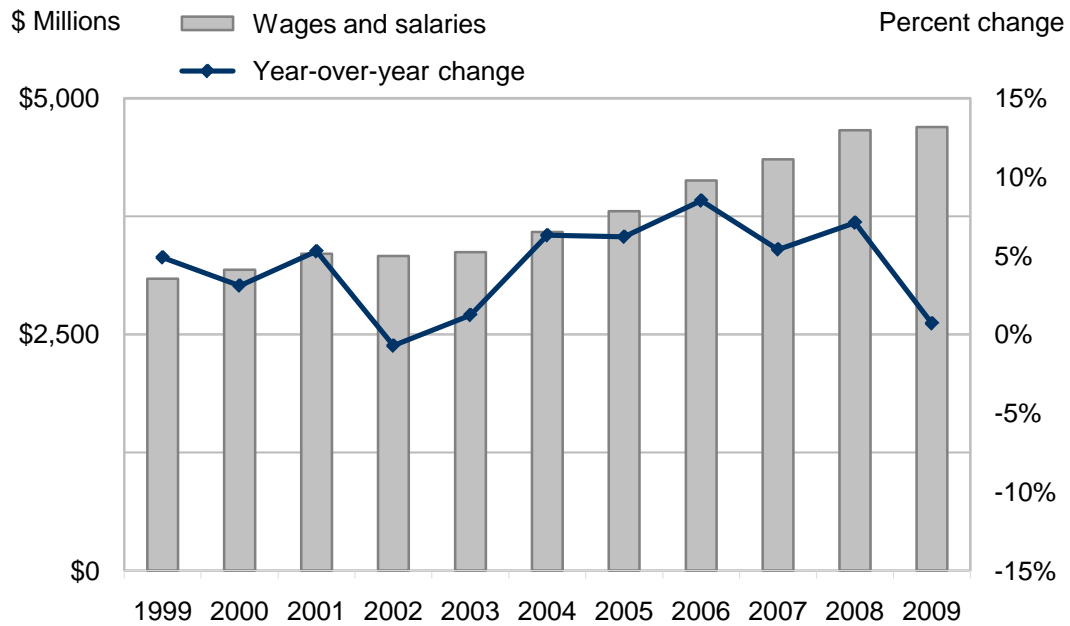
FIGURE 22: TOURISM EMPLOYMENT BY SECTOR (1999 TO 2009).



Wages and salaries

The tourism industry paid \$4.7 billion in wages and salaries in 2009. Even though the number of people employed dropped by 2% from 2008, the 2009 earnings increased by 1% (Figure 23). While tourism wages and salaries posted an increase of 52% since 1999, the growth rates in compensation have not been steady. Salaries and wages dropped after 2001 but rebounded quickly in 2003 and 2004. From 2005 to 2008, wages and salaries have averaged 7% annual growth.

FIGURE 23: WAGES AND SALARIES PAID IN THE TOURISM INDUSTRY (1999 TO 2009).



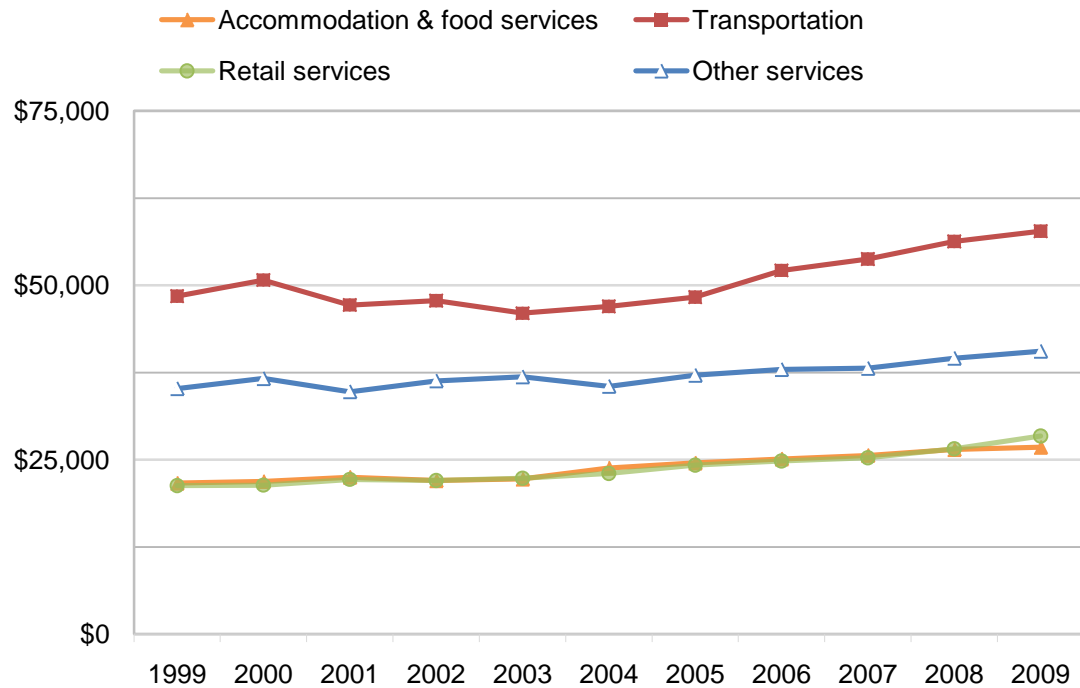
Accommodation and food services account for half of employment, but only 35% of total wages and salaries, whereas transportation services account for one quarter of employment but over 40% of tourism wages and salaries (Figure 24).

FIGURE 24: SHARE OF TOURISM EMPLOYMENT AND SALARIES BY SECTOR (2009).



While the average compensation per employee in all tourism sectors has increased between 15% and 33% since 1999, the average compensation within transportation has been more than double the figure for accommodation and food, and retail services (Figure 25). Compensation in transportation dropped and flattened between 2000 and 2004 but has risen steadily by an average 5% per year since 2006. Wages in accommodation and food have risen 2% per year since 2006, and in retail services, by 4% per year.

FIGURE 25: AVERAGE COMPENSATION PER EMPLOYEE (1999 TO 2009).



3. 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 others¹³
- Travel Survey of Residents of Canada (TSRC): a monthly telephone survey of Canadian households¹⁴

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/revenue¹⁵ 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 durable goods for tourism purposes are not included in the TSRC.
- Respondents to telephone surveys, such as the TSRC, may under-report the number of trips and trip expenditures to reduce interview times or may fail to recall trips or trip details.

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.

¹³ 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>)

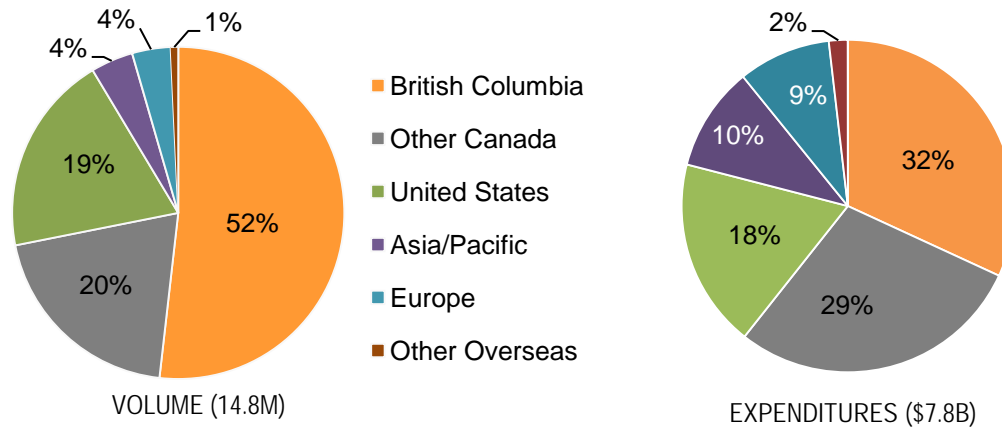
¹⁴ Please visit Statistics Canada's website for more information on the TSRC questionnaire (<http://www.statcan.gc.ca/cgi-bin/imdb/p2SV.pl?Function=getSurvey&SDDS=3810&lang=en&db=imdb&adm=8&dis=2>)

¹⁵ Trip expenditures (from the visitor's perspective) are the flip side of tourism revenues (from the BC economy's perspective).

Overall visitor volume

In 2009, there were almost 15 million overnight visitors in BC, a slight increase of 2% over 2008.¹⁶ About half of the visitors were BC residents (Figure 26). Visitors from other parts of Canada accounted for 20%, while international visitors accounted for the remaining 28% of overall visitor volume. However, international visitors accounted for nearly 40% of visitor expenditures, while Canadian and BC residents each accounted for about 30%.

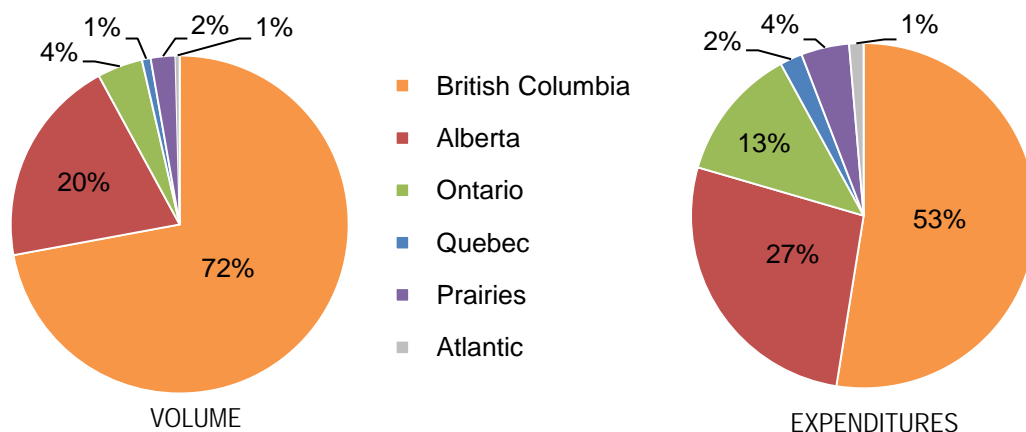
FIGURE 26: VISITOR VOLUME (OVERNIGHT) AND EXPENDITURES BY MARKET ORIGIN (2009).



Domestic market

Visitors from Canada accounted for nearly 11 million travellers in 2009, about a 7% increase from 2008. Of travellers from Canada, BC residents made up the largest share of visitor volume (72%) and expenditures (53%) in 2009 (Figure 27). Alberta was the second largest domestic market of overnight visitors to BC, representing one-fifth of the Canadian visitor volume and 27% of expenditures. Overall, visitors from Canada spent about 2% less in 2009 than in 2008.

FIGURE 27: SHARE OF DOMESTIC VISITOR VOLUME AND EXPENDITURES (2009).



¹⁶Source: Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC). Migration from the Canadian Travel Survey (pre 2005) to the Travel Survey of Residents of Canada, which started in 2005, does not allow comparisons with previous years.

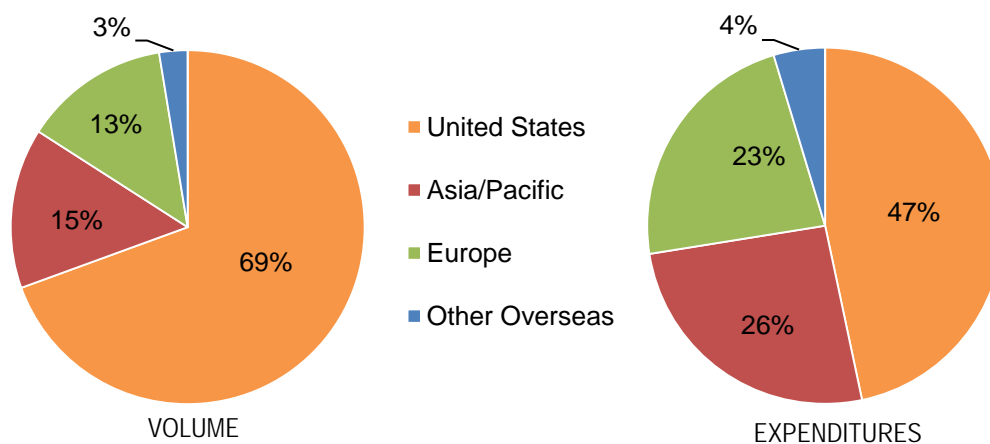
International markets

In 2009, over 4 million international overnight visitors came to BC. The number of international visitors decreased by almost 10% from 2008 and has decreased each year since 2004 (nearly 19%). International visitors spent almost 11% less in 2009 than in 2008.

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 2009 (Figure 28). The number of US visitors dropped 8% compared with 2008 and has decreased each year since 2004 (22% decrease in volume since 2004). US visitor expenditures dropped 9% in 2009 compared with 2008 and have decreased 26% since 2004. Within the US, Washington and California are the largest markets, representing 53% of US visitor volume and 43% of expenditures in 2009.

The number of visitors from the Asia/Pacific dropped 17 per cent in 2009, and from Europe, 11%. Since 2004, there has been a decrease in visitor volume from these markets (Asia/Pacific 19%, and Europe 4%). Between 2004 and 2009, visitor expenditures from Asia/Pacific posted decreases of 5%, while the expenditures from European visitors increased by 2%.

FIGURE 28: INTERNATIONAL VISITOR VOLUME AND EXPENDITURES (2009).



While many Asia/Pacific markets saw declines in 2009, several markets have experienced growth in visitation since 2004, such as Australia, New Zealand and China (which combined represent 6% of the total international market).

The United Kingdom is the largest European market, representing 42% of the European visitor volume and 38% of visitor revenues in 2009. Most major European markets experienced declines during the economic slowdown. Even though the visitor volumes from Germany and France dropped by 1% and 7% respectively, visitor expenditures from these markets increased by 6% and 15.6%). When combined, visitor volume from Germany and France represent 3% of overall international volume in 2009.

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.

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total revenue (\$ millions)	\$8,592	\$9,339	\$9,582	\$9,720	\$9,799	\$10,717	\$11,465	\$12,205	\$12,957	\$13,484	\$12,706
% change	0.7%	8.7%	2.6%	1.4%	0.8%	9.4%	7.0%	6.5%	6.2%	4.1%	-5.8%
Accommodation room revenue (\$ millions)	\$1,329	\$1,437	\$1,469	\$1,503	\$1,481	\$1,587	\$1,682	\$1,808	\$1,964	\$1,977	\$1,743
% change	10.2%	8.1%	2.2%	2.3%	-1.5%	7.2%	5.9%	7.5%	8.6%	0.7%	-11.9%
Tax revenues	\$728	\$760	\$694	\$683	\$698	\$761	\$809	\$870	\$930	\$930	\$863
% change	7.4%	4.4%	-8.7%	-1.6%	2.2%	9.0%	6.3%	7.5%	6.9%	0.0%	-7.2%
Export revenue	.	\$3,471	\$3,650	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049
% change	.	.	5.2%	0.4%	-12.3%	11.0%	-4.7%	-0.7%	2.7%	-1.5%	-10.7%
Gross Domestic Product (GDP; \$2002 millions)	\$5,067	\$5,263	\$5,273	\$5,238	\$5,261	\$5,557	\$5,864	\$6,105	\$6,356	\$6,459	\$6,304
% change	0.9%	3.9%	0.2%	-0.7%	0.4%	5.6%	5.5%	4.1%	4.1%	1.6%	-2.4%
Total establishments	17,677	18,021	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814
% change	0.8%	1.9%	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%
Tourism employment ('000)	101.9	102.4	109.9	110.1	112.2	115.3	118.4	123.6	127.5	131.4	128.6
% change	-1.2%	0.5%	7.3%	0.2%	1.9%	2.8%	2.7%	4.4%	3.2%	3.1%	-2.1%
Wages and salaries (\$ millions)	\$3,090	\$3,186	\$3,354	\$3,330	\$3,371	\$3,583	\$3,805	\$4,129	\$4,353	\$4,663	\$4,696
% change	4.9%	3.1%	5.3%	-0.7%	1.2%	6.3%	6.2%	8.5%	5.4%	7.1%	0.7%
International visitors ('000)	.	5,305	5,307	5,345	4,844	5,149	4,983	4,951	4,911	4,629	4,175
% change	.	.	0.04%	0.7%	-9.4%	6.3%	-3.2%	-0.6%	-0.8%	-5.7%	-9.8%

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

	Industry groups	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Revenue (\$ millions)	Accommodation & food services	\$3,183	\$3,276	\$3,434	\$3,510	\$3,422	\$3,815	\$4,155	\$4,451	\$4,714	\$4,753	\$4,445
	Transportation services	\$2,852	\$3,087	\$3,031	\$2,967	\$3,004	\$3,212	\$3,507	\$3,715	\$3,905	\$4,097	\$3,865
	Retail services	\$1,918	\$2,326	\$2,437	\$2,487	\$2,568	\$2,751	\$2,920	\$3,132	\$3,390	\$3,572	\$3,337
	Other services	\$640	\$649	\$680	\$756	\$805	\$940	\$883	\$906	\$949	\$1,063	\$1,059
	Overall	\$8,592	\$9,339	\$9,582	\$9,720	\$9,799	\$10,717	\$11,465	\$12,205	\$12,957	\$13,484	\$12,706
% change	Accommodation & food services	-0.3%	2.9%	4.8%	2.2%	-2.5%	11.5%	8.9%	7.1%	5.9%	0.8%	-6.5%
	Transportation services	0.3%	8.2%	-1.8%	-2.1%	1.2%	6.9%	9.2%	5.9%	5.1%	4.9%	-5.7%
	Retail services	1.7%	21.3%	4.8%	2.1%	3.3%	7.1%	6.1%	7.3%	8.2%	5.4%	-6.6%
	Other services	5.4%	1.4%	4.8%	11.2%	6.5%	16.8%	-6.1%	2.6%	4.7%	12.0%	-0.4%
	Overall	0.7%	8.7%	2.6%	1.4%	0.8%	9.4%	7.0%	6.5%	6.2%	4.1%	-5.8%

Source: BC Stats

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

Region		1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Room revenue (\$ millions)	Vancouver Island	\$234	\$239	\$251	\$263	\$267	\$288	\$303	\$318	\$345	\$333	\$303
	Vancouver, Coast & Mtns	\$780	\$857	\$864	\$860	\$820	\$876	\$914	\$979	\$1,050	\$1,062	\$923
	Thompson Okanagan	\$148	\$158	\$164	\$179	\$185	\$201	\$220	\$238	\$267	\$273	\$243
	Kootenay Rockies	\$75	\$82	\$83	\$92	\$91	\$98	\$100	\$113	\$135	\$133	\$119
	Cariboo Chilcotin Coast	\$20	\$21	\$21	\$21	\$21	\$21	\$23	\$24	\$26	\$27	\$24
	Northern BC	\$73	\$80	\$85	\$88	\$96	\$103	\$121	\$136	\$141	\$149	\$130
	Overall	\$1,329	\$1,437	\$1,469	\$1,503	\$1,481	\$1,587	\$1,682	\$1,808	\$1,964	\$1,977	\$1743
% change	Vancouver Island	8.5%	2.0%	5.3%	4.4%	1.7%	7.8%	5.4%	4.7%	8.6%	-3.4%	-9.2%
	Vancouver, Coast & Mtns	13.3%	9.9%	0.9%	-0.5%	-4.6%	6.7%	4.4%	7.1%	7.3%	1.1%	-13.1%
	Thompson Okanagan	7.1%	7.3%	3.9%	8.5%	3.7%	8.6%	9.5%	8.1%	12.3%	2.1%	-10.8%
	Kootenay Rockies	11.6%	9.0%	1.6%	10.0%	-0.3%	7.5%	2.3%	12.4%	19.4%	-1.2%	-10.4%
	Cariboo Chilcotin Coast	-1.3%	9.0%	-2.0%	2.5%	-1.8%	1.7%	5.2%	8.1%	5.8%	3.7%	-9.6%
	Northern BC	-4.9%	9.0%	6.1%	3.9%	8.5%	7.7%	17.0%	12.4%	3.9%	6.0%	-12.6%
	Overall	10.2%	8.1%	2.2%	2.3%	-1.5%	7.2%	5.9%	7.5%	8.6%	0.7%	-11.9%

Source: BC Stats

TABLE 4: TOTAL PROVINCIAL TAX REVENUE GENERATED BY THE TOURISM INDUSTRY (1999 TO 2009).

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total provincial taxes ^A (\$ millions)	\$728	\$760	\$694	\$683	\$698	\$761	\$809	\$870	\$930	\$930	\$863
% change	7.4%	4.4%	-8.7%	-1.6%	2.2%	9.0%	6.3%	7.5%	6.9%	0.0%	-7.2%

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

Source: BC Stats

TABLE 5: EXPORT REVENUE GENERATED BY THE TOURISM INDUSTRY.

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Tourism export revenue (\$ millions)	.	\$3,471	\$3,650	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049
% change	.	.	5.2%	0.4%	-12.3%	11.0%	-4.7%	-0.7%	2.7%	-1.5%	-10.7%

Tourism export revenue data is not available prior to 2000.

TABLE 6: COMPARING EXPORT REVENUES FOR BC'S PRIMARY COMMODITIES (1999 TO 2009).

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Forest industry	\$15,847	\$16,591	\$14,940	\$14,353	\$12,997	\$15,081	\$14,134	\$13,560	\$12,282	\$10,107	\$7,602
<i>Wood products</i>	\$10,193	\$9,652	\$9,374	\$9,284	\$8,239	\$10,062	\$9,485	\$8,776	\$7,164	\$5,408	\$4,127
<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	\$3,475
Agriculture and fish	\$2,013	\$2,125	\$2,350	\$2,420	\$2,371	\$2,416	\$2,371	\$2,422	\$2,349	\$2,468	\$2,432
<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	\$1,563
<i>Fish products</i>	\$845	\$895	\$965	\$1,014	\$981	\$974	\$985	\$978	\$897	\$899	\$869
Metallic mineral products	\$1,430	\$1,836	\$1,336	\$1,420	\$1,535	\$2,089	\$2,705	\$3,586	\$3,445	\$3,348	\$2,491
Energy products	\$3,195	\$6,130	\$6,366	\$3,713	\$4,847	\$4,549	\$7,801	\$6,455	\$6,201	\$9,671	\$6,728
Tourism industry	.	\$3,471	\$3,650	\$3,664	\$3,213	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049

Source: BC Stats

TABLE 7: TOURISM GDP USING 2002 DOLLARS BY SECTOR (1999 TO 2009).

	Sectors	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
GDP (\$ millions)	Accommodation & food services	\$1,937	\$1,926	\$1,908	\$1,955	\$1,943	\$2,079	\$2,162	\$2,218	\$2,279	\$2,306	\$2,236
	Transportation services	\$1,853	\$1,988	\$1,950	\$1,831	\$1,785	\$1,889	\$2,097	\$2,188	\$2,305	\$2,366	\$2,282
	Retail services	\$450	\$489	\$514	\$508	\$540	\$563	\$583	\$639	\$680	\$665	\$649
	Other services	\$835	\$864	\$907	\$945	\$993	\$1,026	\$1,023	\$1,060	\$1,092	\$1,122	\$1,137
	Overall	\$5,067	\$5,263	\$5,273	\$5,238	\$5,261	\$5,557	\$5,864	\$6,105	\$6,356	\$6,459	\$6,304
% change	Accommodation & food services	-0.9%	-0.6%	-0.9%	2.5%	-0.6%	7.0%	4.0%	2.6%	2.8%	1.2%	-3.0%
	Transportation services	0.6%	7.3%	-1.9%	-6.1%	-2.5%	5.8%	11.0%	4.3%	5.3%	2.6%	-3.6%
	Retail services	-0.4%	8.7%	5.1%	-1.2%	6.3%	4.3%	3.6%	9.6%	6.4%	-2.2%	-2.4%
	Other services	6.2%	3.5%	5.0%	4.2%	5.1%	3.3%	-0.3%	3.6%	3.0%	2.7%	1.3%
	Overall	0.9%	3.9%	0.2%	-0.7%	0.4%	5.6%	5.5%	4.1%	4.1%	1.6%	-2.4%

Source: BC Stats

TABLE 8: COMPARING GDP OF TOURISM SECTORS USING AN INDEX WHERE 2002 = 100.

Sectors	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Accommodation & food services	99	99	98	100	99	106	111	113	117	118	114
Transportation services	101	109	106	100	97	103	115	119	126	129	125
Retail services	89	96	101	100	106	111	115	126	134	131	128
Other services	88	91	96	100	105	109	108	112	116	119	120
Tourism industry	97	100	101	100	100	106	112	117	121	123	120

Source: BC Stats

TABLE 9: COMPARING GDP OF BC PRIMARY RESOURCE INDUSTRIES (1999 TO 2009).

	Industries	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
GDP (\$ millions)	Agriculture	\$1,639	\$1,736	\$1,834	\$1,716	\$1,739	\$1,745	\$1,777	\$1,789	\$1,774	\$1,675	\$1,620
	Forestry	\$2,789	\$2,638	\$2,647	\$2,713	\$2,761	\$3,129	\$3,102	\$3,022	\$2,855	\$2,343	\$1,966
	Mining, oil and gas extraction	\$3,329	\$3,344	\$4,252	\$4,383	\$4,298	\$4,270	\$4,643	\$4,645	\$4,422	\$4,371	\$4,144
	Tourism	\$5,067	\$5,263	\$5,273	\$5,238	\$5,261	\$5,557	\$5,864	\$6,105	\$6,356	\$6,459	\$6,304
Index (2002 = 100)	Agriculture	96	101	107	100	101	102	104	104	103	98	94
	Forestry	103	97	98	100	102	115	114	111	105	86	72
	Mining, oil and gas extraction	76	76	97	100	98	97	106	106	101	99.7	95
	Tourism	97	100	101	100	100	106	112	117	121	123	120

Source: BC Stats http://www.bcstats.gov.bc.ca/data/bus_stat/bcea/BCEAchnd.asp

TABLE 10: TOURISM ESTABLISHMENTS BY BUSINESS SIZE (1999 TO 2009).

	Business size	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Establishments	1 to 4 employees	7,799	7,723	7,842	7,737	8,302	7,995	8,177	8,256	6,179	6,121	6,177
	5 to 9 employees	3,160	3,182	3,259	3,260	3,234	3,266	3,133	3,170	3,886	3,816	3,823
	10 to 19 employees	2,874	2,991	2,974	2,991	3,038	3,007	2,980	2,937	3,538	3,687	3,684
	20 to 49 employees	2,644	2,645	2,490	2,563	2,235	2,408	2,454	2,438	2,691	2,744	2,744
	50 to 199 employees	1,087	1,349	1,270	1,316	1,178	1,221	1,204	1,220	1,230	1,248	1,230
	200 or more employees	113	131	131	129	127	138	146	166	138	158	156
	Overall	17,677	18,021	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814
% 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%	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%	0.2%
	10 to 19 employees	-2.6%	4.1%	-0.6%	0.6%	1.6%	-1.0%	-0.9%	-1.4%	20.5%	4.2%	-0.1%
	20 to 49 employees	1.7%	0.0%	-5.9%	2.9%	-12.8%	7.7%	1.9%	-0.7%	10.4%	2.0%	0.0%
	50 to 199 employees	8.5%	24.1%	-5.9%	3.6%	-10.5%	3.7%	-1.4%	1.3%	0.8%	1.5%	-1.4%
	200 or more employees	11.9%	15.9%	0.0%	-1.5%	-1.6%	8.7%	5.8%	13.7%	-16.9%	14.5%	-1.3%
	Overall	0.8%	1.9%	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%

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

Source: BC Stats

TABLE 11: TOURISM ESTABLISHMENTS BY INDUSTRY SECTOR (1999 TO 2009).

	Business size	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Establishments	Food & beverage	9,335	9,525	9,450	9,491	9,636	9,586	9,603	9,511	9,412	9,545	9,609
	Accommodation	2,110	2,122	2,108	2,071	2,032	2,015	2,027	2,028	1,927	1,927	1,906
	Transportation	3,453	3,525	3,502	3,483	3,494	3,472	3,485	3,563	3,369	3,356	3,389
	Amusement, gambling & recreation	1,829	1,817	1,822	1,824	1,794	1,756	1,746	1,780	1,760	1,751	1,714
	Performing arts & sports	742	831	886	929	968	963	1,010	1,089	983	994	984
	Heritage institutions	208	201	198	198	190	243	223	216	211	201	212
	Overall	17,677	18,021	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814
% change	Food & beverage	-0.4%	2.0%	-0.8%	0.4%	1.5%	-0.5%	0.2%	-1.0%	-1.0%	1.4%	0.7%
	Accommodation	-2.4%	0.6%	-0.7%	-1.8%	-1.9%	-0.8%	0.6%	0.0%	-5.0%	0.0%	-1.1%
	Transportation	2.8%	2.1%	-0.7%	-0.5%	0.3%	-0.6%	0.4%	2.2%	-5.4%	-0.4%	1.0%
	Amusement, gambling & recreation	5.6%	-0.7%	0.3%	0.1%	-1.6%	-2.1%	-0.6%	1.9%	-1.1%	-0.5%	-2.1%
	Performing arts & sports	4.4%	12.0%	6.6%	4.9%	4.2%	-0.5%	4.9%	7.8%	-9.7%	1.1%	-1.0%
	Heritage institutions	4.0%	-3.4%	-1.5%	0.0%	-4.0%	27.9%	-8.2%	-3.1%	-2.3%	-4.7%	5.5%
	Overall	0.8%	1.9%	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%

Source: BC Stats

TABLE 12: TOURISM ESTABLISHMENTS BY REGION (1999 TO 2009).

Region	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Vancouver Island	2,485	2,511	2,460	2,421	2,991	2,994	2,994	3,014	2,933	2,998	3,014
Vancouver, Coast & Mtns	9,468	9,743	9,767	9,847	10,190	10,169	10,323	10,346	9,964	10,014	10,122
Thompson Okanagan	2,028	2,048	2,046	2,037	2,343	2,329	2,302	2,339	2,168	2,231	2,200
Kootenay Rockies	715	755	744	733	940	903	884	882	854	873	862
Cariboo Chilcotin Coast	217	219	208	197	368	369	355	365	360	376	357
Northern BC	1,086	1,050	1,033	1,020	1,259	1,234	1,202	1,201	1,144	1,132	1,131
<i>Standard geographic coding not available</i>	<i>1,678</i>	<i>1,695</i>	<i>1,708</i>	<i>1,741</i>	<i>23</i>	<i>37</i>	<i>34</i>	<i>40</i>	<i>239</i>	<i>150</i>	<i>128</i>
Total establishments	17,677	18,021	17,966	17,996	18,114	18,035	18,094	18,187	17,662	17,774	17,814
% change	0.8%	1.9%	-0.3%	0.2%	0.7%	-0.4%	0.3%	0.5%	-2.9%	0.6%	0.2%

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 with 2002.

Source: BC Stats

TABLE 13: TOURISM EMPLOYMENT BY SECTOR (1999 TO 2009).

	Sectors	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Employment	Accommodation & food services	50,400	50,900	54,000	54,900	55,500	56,100	58,000	61,400	63,300	65,500	63,400
	Transportation services	27,900	27,700	29,800	28,300	29,200	29,900	31,300	31,900	32,900	33,600	33,100
	Retail services	13,200	13,300	14,200	14,800	15,400	15,900	16,300	17,200	18,200	18,700	18,100
	Other services	10,400	10,400	12,000	12,200	12,200	13,400	12,800	13,100	13,200	13,700	14,100
	Overall	101,900	102,400	109,900	110,100	112,200	115,300	118,400	123,600	127,500	131,400	128,600
% change	Accommodation & food services	-0.2%	1.0%	6.1%	1.7%	1.1%	1.1%	3.4%	5.9%	3.1%	3.5%	-3.2%
	Transportation services	0.0%	-0.7%	7.6%	-5.0%	3.2%	2.4%	4.7%	1.9%	3.1%	2.1%	-1.5%
	Retail services	-1.5%	0.8%	6.8%	4.2%	4.1%	3.2%	2.5%	5.5%	5.8%	2.7%	-3.2%
	Other services	-7.1%	0.0%	15.4%	1.7%	0.0%	9.8%	-4.5%	2.3%	0.8%	3.8%	2.9%
	Overall	-1.2%	0.5%	7.3%	0.2%	1.9%	2.8%	2.7%	4.4%	3.2%	3.1%	-2.1%

Source: BC Stats

TABLE 14: TOURISM WAGES AND SALARIES BY SECTOR (1999 TO 2009).

	Sectors	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Wages & salaries (\$ millions)	Accommodation & food services	\$1,091	\$1,114	\$1,215	\$1,208	\$1,234	\$1,336	\$1,423	\$1,542	\$1,622	\$1,733	\$1,698
	Transportation services	\$1,352	\$1,406	\$1,406	\$1,353	\$1,343	\$1,405	\$1,512	\$1,663	\$1,769	\$1,891	\$1,912
	Retail services	\$281	\$284	\$315	\$326	\$344	\$366	\$395	\$427	\$460	\$497	\$514
	Other services	\$366	\$381	\$417	\$443	\$450	\$476	\$475	\$497	\$503	\$542	\$572
	Overall	\$3,090	\$3,186	\$3,354	\$3,330	\$3,371	\$3,583	\$3,805	\$4,129	\$4,353	\$4,663	\$4,696
% change	Accommodation & food services	4.5%	2.1%	9.1%	-0.6%	2.2%	8.3%	6.5%	8.4%	5.2%	6.8%	-2.0%
	Transportation services	5.0%	4.0%	0.0%	-3.8%	-0.7%	4.6%	7.6%	10.0%	6.4%	6.9%	1.1%
	Retail services	1.4%	1.1%	10.9%	3.5%	5.5%	6.4%	7.9%	8.1%	7.7%	8.0%	3.4%
	Other services	8.3%	4.1%	9.4%	6.2%	1.6%	5.8%	-0.2%	4.6%	1.2%	7.8%	5.5%
	Overall	4.9%	3.1%	5.3%	-0.7%	1.2%	6.3%	6.2%	8.5%	5.4%	7.1%	0.7%

Source: BC Stats

TABLE 15: INTERNATIONAL VISITOR VOLUME (2004 TO 2009).

Market	Volume (thousands)						% change					
	2004	2005	2006	2007	2008	2009	04-05	05-06	06-07	07-08	08-09	04-09
United States	3,711	3,536	3,518	3,394	3,147	2,899	-5%	-1%	-4%	-7%	-8%	-22%
Washington	1,393	1,332	1,257	1,201	1,187	1,153	-4%	-6%	-5%	-1%	-3%	-17%
California	530	466	488	474	419	375	-12%	5%	-3%	-12%	-10%	-29%
Oregon	212	202	209	188	162	148	-5%	3%	-10%	-14%	-9%	-30%
Arizona	69	86	75	78	64	61	25%	-13%	4%	-18%	-5%	-12%
Florida	108	104	93	91	93	65	-4%	-10%	-3%	2%	-30%	-40%
Texas	106	123	136	127	117	118	15%	11%	-7%	-8%	0%	11%
Mexico	57	59	62	69	82	64	4%	4%	12%	20%	-22%	12%
Asia/Pacific	750	757	744	765	738	611	1%	-2%	3%	-4%	-17%	-19%
Japan	200	204	183	172	125	84	2%	-10%	-6%	-28%	-33%	-58%
Taiwan	98	91	88	75	49	37	-7%	-3%	-14%	-36%	-25%	-62%
Hong Kong	66	62	58	63	77	60	-6%	-7%	10%	22%	-22%	-9%
Australia	107	113	119	144	142	129	5%	6%	21%	-2%	-9%	21%
South Korea	104	107	120	110	104	73	3%	12%	-8%	-6%	-30%	-30%
China	68	65	65	69	90	92	-4%	0%	6%	30%	2.2%	35%
New Zealand	18	21	23	25	36	31	14%	10%	8%	45%	-14%	72%
India	10	8	9	22	23	26	-18%	10%	140%	5%	14.7%	160%
Europe	580	595	576	635	624	557	3%	-3%	10%	-2%	-11%	-4%
United Kingdom	288	298	289	324	293	235	4%	-3%	12%	-9%	-20%	-18%
Germany	116	111	104	101	112	111	-4%	-6%	-3%	10.3%	-1%	-4%
Netherlands	45	43	45	48	50	43	-5%	3%	7%	5%	-16%	-4%
France	24	17	19	23	27	25	-29%	12%	23%	17%	-7%	4%
Other overseas	51	35	51	48	39	44	-31%	46%	-7%	-19%	15%	-14%
TOTAL INTERNATIONAL	5,149	4,983	4,951	4,911	4,630	4,175	-3%	-1%	-1%	-6%	-10%	-19%

TABLE 16: INTERNATIONAL VISITOR EXPENDITURES (2004 TO 2009).

Market	Expenditures (\$ millions)						% change					
	2004	2005	2006	2007	2008	2009	04-05	05-06	06-07	07-08	08-09	04-09
United States	\$1,925	\$1,722	\$1,727	\$1,671	\$1,567	\$1,424	-11%	0%	-3%	-6%	-9%	-26%
Washington	\$427	\$402	\$371	\$369	\$365	\$364	-6%	-8%	-1%	-1%	0%	-15%
California	\$364	\$289	\$329	\$323	\$290	\$246	-21%	14%	-2%	-10%	-15%	-32%
Oregon	\$89	\$90	\$88	\$94	\$95	\$91	2%	-3%	7%	2%	-5%	2%
Arizona	\$39	\$60	\$49	\$47	\$38	\$36	54%	-18%	-4%	-19%	-6%	-8%
Florida	\$82	\$72	\$54	\$46	\$42	\$36	-13%	-25%	-14%	-10%	-13%	-56%
Texas	\$82	\$88	\$92	\$80	\$83	\$77	7%	5%	-13%	4%	-8%	-6%
Mexico	\$75	\$74	\$79	\$83	\$96	\$89	-1%	7%	6%	16%	-7%	19%
Asia/Pacific	\$825	\$815	\$824	\$844	\$898	\$786	-1%	1%	2%	6%	-12%	-5%
Japan	\$217	\$236	\$194	\$164	\$138	\$111	9%	-18%	-16%	-16%	-20%	-50%
Taiwan	\$87	\$75	\$75	\$71	\$49	\$44	-14%	0%	-5%	-31%	-10%	-49%
Hong Kong	\$74	\$68	\$53	\$58	\$70	\$59	-8%	-22%	10%	20%	-15%	-20%
Australia	\$125	\$128	\$144	\$177	\$191	\$172	2%	13%	23%	8%	-10%	38%
South Korea	\$120	\$124	\$162	\$138	\$165	\$117	4%	31%	-15%	20%	-28%	-3%
China	\$95	\$68	\$75	\$101	\$121	\$135	-29%	11%	34%	20%	12%	42%
New Zealand	\$18	\$10	\$19	\$22	\$48	\$49	-46%	95%	17%	114%	2%	172%
India	\$3	\$2	\$3	\$11	\$16	\$18	-33%	38%	249%	42%	10%	500%
Europe	\$685	\$744	\$687	\$808	\$807	\$698	9%	-8%	18%	-0.1%	-14%	2%
United Kingdom	\$343	\$384	\$338	\$392	\$369	\$268	12%	-12%	16%	-6%	-27%	-22%
Germany	\$124	\$143	\$126	\$113	\$147	\$156	16%	-12%	-11%	31%	6%	26%
Netherlands	\$52	\$42	\$50	\$54	\$67	\$57	-20%	20%	6%	24%	-14%	10%
France	\$22	\$22	\$26	\$37	\$26	\$30	1%	18%	43%	-30%	16%	36%
Other overseas	\$58	\$43	\$60	\$59	\$46	\$53	-25%	37%	-1%	-22%	15%	-9%
TOTAL INTERNATIONAL	\$3,568	\$3,399	\$3,376	\$3,466	\$3,414	\$3,049	-5%	-1%	3%	-2%	-11%	-15%

TABLE 17: DOMESTIC CANADIAN VISITOR VOLUME AND EXPENDITURES (2009).

Region	Visitor volume (thousands)	Revenue (\$millions)
British Columbia	7,687	\$2,471
Alberta	2,130	\$1,269
Ontario	462	\$589
Quebec	90	\$99
Prairies	252	\$212
Atlantic	41	\$63
Total	10,663	\$4,703