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Tourism Highlights 1994

TOURISM
BRITISH COLUMBIA



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- TOURISM -
BRITISH COLUMBIA

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Executive Summary

Tourism Highlights 1994 provides an annual overview of the tourism industry in British Columbia. Important indicators, used by Tourism BC to monitor industry performance, are presented in a world-wide, national and provincial context. Measures of visitor volumes, revenues and provincial indicators are examined, as well as the economic contribution of the tourism industry to the province.

The World Tourism Organization estimates that total world-wide international visitations increased 3.7% in 1994 over 1993, to reach 531.4 million. Receipts from international tourists increased by 9.2% in 1994, to reach US \$335.8 billion.

Canada ranked 12th in the world for visitor arrivals, and 14th in the world for tourism receipts. Although both visitors and receipts were up in 1994, Canada's market share for each relative to other countries slipped over the previous year. For receipts, this can be partly attributed to the decline in the value of the Canadian dollar, since receipts are measured in US dollar equivalents.

Canada continues to capture approximately 3% of the world visitor market. Declining visitors from the US (-0.6% compared to 1993) caused 1994 growth in total international visitors to be low, at 1.5%. Unlike last year, "Asia/Oceania led the increase in Overseas visitors to Canada with a growth rate of 18.5% Europe followed with a growth rate of 4.2%.

In order to focus business and marketing strategies, Tourism BC divides visitors into geographic markets based on place of origin. These markets include BC, Regional, North American Long Haul, Asia/Oceania, Europe and Other International, with BC residents being the largest market. In 1994, growth was once again positive in all markets over 1993. An estimated 25.65 million overnight trips were taken within BC, up 5.1 % from 1993. Total spending by visitors on these trips was estimated at \$6.31 billion, up 8.5% from 1993. The top six international nations providing the largest number of visitors to BC continue to be the United States, Japan, the United Kingdom, Germany, Hong Kong and Australia.

Provincial tourism indicators each show positive growth in 1994 over 1993. Domestic air passenger traffic through Vancouver International Airport was up 4.9%; BC Ferry passenger traffic between Vancouver and Vancouver Island was up 4.2%; Rogers Pass westbound passenger vehicle traffic was up 8.27%; Coquihalla passenger vehicle traffic was up 3.6%; provincial campground attendance was up 7.5 % and accommodation room revenue was up 9.6%.

In 1994, the BC tourism industry contributed \$3.75 billion to the provincial Gross Domestic Product (GDP), representing 4.3% of the provincial total. In 1994, tourism earned \$1.66 billion in foreign exchange, making it the third largest export industry in BC, after softwood lumber and pulp.

It has been estimated that approximately 220,400 people in 1994 worked in tourism related services such as accommodation, transportation, restaurants, entertainment and recreation. This number is up an average 4.3% each year over the past two years.

Introduction

Tourism has an important role to play in the future stability, diversification and growth of British Columbia's economy. The positive impacts of tourism are wide-reaching and varied, including job creation, economic growth, foreign exchange and regional distribution of benefits.

When discussing or measuring the impacts of tourism, it is important to have standard definitions that will allow for comparisons between countries, provinces and regions. In 1993, the United Nations approved standard international tourism definitions for visitors as follows:

A *visitor* is a person who travels to a place outside their usual environment, for a period not exceeding 12 months, and whose main purpose of visit is other than the exercise of an activity remunerated from the place visited.

Visitors may be traveling for leisure, recreation and holidays; visiting friends and relatives; business and other professional reasons; health treatment; religion/pilgrimages; or other purposes. Visitors are further divided depending on their length of stay:

- *an overnight visitor* is a visitor who stays at least one night in the place visited in a collective or private accommodation; and
- a *same day visitor*, or excursionist, is a visitor who travels more than 80 km one way, and who does not stay overnight.

Managed properly, tourism can continue to provide a significant contribution to the diversification of the BC economy, as well as offer residents and visitors opportunities for entertainment and recreation. This report highlights the results of Tourism BC's efforts to attract visitors to our province, as well as to encourage BC residents to travel within BC. Both the world and Canadian tourism markets are summarized. Following are highlights on tourism in British Columbia, including volume and revenue estimates, domestic travel indicators, tourism trends, primary sources of international visitors, and the economic impact of tourism in BC. Also included are regional reports from each of the tourism associations in British Columbia.

¹ The ambiguity of the term "usual environment" has led to the establishment of distance measures to define tourist travel. Tourism BC has adopted Tourism Canada's definition, with a minimum one-way travel distance of 80 kilometres.

International tourism numbers continue to grow. In 1994, total world-wide international visitation was estimated at 531.4 million persons, up 3.7% over 1993. Receipts from international tourists were estimated at US \$335.8 billion, up 9.2% over 1993 receipts. Growth rates in both visitations and receipts surpassed those of last year.

International Tourism Estimates

Year	Total International Visitations (millions)	% change from Previous Year	Receipts from International Tourists (US \$billions)	% Change from Previous Year
1950	25.3		2.1	
1960	69.3		6.9	
1970	165.8		17.9	
1980	287.8		103.5	
1990	455.9	6.2%/0	261.0	21.1%
1991	463.1	1.6%	267.5	2.5%
1992	502.9	8.6%	305.0	14.0%/0
1993	512.5	1.9%/0	307.4	0.8%
1994	531.4	3.7%	335.8	9.2%

Source: World Tourism Organization

On the following page, the world's top fifteen nations in terms of visitor destinations and revenue earners are ranked. France and the United States were once again the top two nations in terms of international visitor arrivals, although the United States saw a slight decline (less than 1.0%) in 1994. Visitor arrivals in 1994 were 60.6 and 45.5 million, respectively, for France and the United States, with Spain coming in a close third at 43.2 million visitors. In terms of receipts, the United States once again led all other nations, with an estimated total of US \$60.0 billion. France, with an estimated total of US \$25.0 billion, once again ranked a distant second.

An estimated 16.0 million visitors came to Canada in 1994, making it the 12th largest nation for visitor arrivals. Tourism receipts were US \$6.3 billion, making Canada the 14th largest nation in terms of tourism earnings. Although both visitors and receipts were up for Canada in 1994 -- 5.96% and 6.66%, respectively -- the increases were not as high as those in some nations. As a result, Canada fell from 11th to 12th place for number of visitors, and from 11th to 14th place for tourism receipts, compared to 1993. For receipts, this can be partly attributed to the decline in the value of the Canadian dollar, since receipts are measured in US dollar equivalents.

Hong Kong and China continue to receive an increasing share of total international tourism spending, rising from 2.47% and 1.64% of all international tourism spending, respectively, in 1993 to 2.68% and 2.08% in 1994.

The Top Fifteen Tourism Destinations In The World

Rank		Country	1994 Visitors millions	1994 % of World Arrivals	o/o Change 1 994/93
1985	1994				
1	1	France	60.6	11.40	0.83
3	2	United States	45.5	8.56	-0.66
2	3	Spain	43.2	8.13	7.73
4	4	Italy	27.5	5.18	4.17
11	5	Hungary	21.4	4.03	-6.14
12	6	China	21.1	3.97	11.05
6	7	United Kingdom	20.9	3.93	7.18
14	8	Poland	18.8	3.54	10.59
5	9	Austria	17.9	3.37	-2.19
9	10	Mexico	17.1	3.22	3.64
	11	Czech Republic	17.0	3.20	47.83
7	12	Canada	16.0	3.01	5.96
8	13	Germany	14.5	2.73	1.40
10	14	Switzerland	12.2	2.30	-1.61
13	15	Greece	10.1	1.90	7.45

Source: Economist Intelligence Unit

The Top Fifteen Tourism Earners In The World

Rank		Country	1994 Receipts \$billions US	1994 % of World Receipts	o/o Change 1 994/93
1985	1994				
1	1	United States	60.001	17.87	4.13.
3	2	France	25.000	7.44	6.79
2	3	Italy	23.927	7.12	16.60
4	4	Spain	21.410	6.37	10.22
11	5	United Kingdom	13.983	4.17	3.96
12	6	Austria	13.160	3.93	-2.99
6	7	Germany	10.650	3.19	1.34
5	8	Hong Kong	8.987	2.68	18.84
14	9	Switzerland	7.793	2.32	11.31
9	10	China	7.000	2.08	49.48
81	11	Thailand	6.592	1.97	31.47
7	12	Mexico	6.557	1.97	6.32
8	13	Singapore	6.459	1.94	11.50
10	14	Canada	6.290	1.88	6.66
13	15	Poland	6.150	1.85	36.67

Source: World Tourism Organization

Tourism in Canada

Inbound travel to Canada has continued to recover from the recession during the early 1990s. World-wide economic growth and rising consumer confidence led to an increase of 7.0% in total visitor entries (sameday plus overnight travelers) over 1993. This increase was attributed to US sameday visitors (up 11.5%), and Overseas visitors (up 9.0%). Unlike last year, Asia/Oceania led the increase in Overseas visitors with a growth rate of 18.5%. Europe followed with a growth rate of 4.2%.

Annual visitor volumes to Canada from US overnight travelers continues to fluctuate. While volume was up 6.5% in 1993, it was down slightly (less than 1.0%) in 1994. Unless total outbound US volume was down as well, the decrease in 1994 means that Canada is capturing a smaller share of the US overnight market. This corroborates Tourism Canada's report that Canada is capturing less and less of the US outbound market.

The top seven markets for Overseas visitors to Canada in 1993 continue to dominate in 1994. These are: the United Kingdom, Japan, France, Germany, Hong Kong, Australia, and Italy. Unlike last year, where only four of these seven markets saw increases over the previous year, 1994 saw increases in six out of seven. In addition, South Korea is emerging as a major market for visitors to Canada. 1994 visitors increased by 104% over 1993, making South Korea the eighth largest market for Overseas visitors to Canada.

1994 Major Overseas Visitor Markets

Inbound from:	Visitors	94/93 % change	1994 % of Overseas Market	1993 % of Overseas Market
United Kingdom	620,754	-1.3%	16.4%	18.1%
Japan	563,204	11.3%	14.9%	14.5%
France	427,192	11.8%	11.3%	11.0%
Germany	409,274	3.1%	10.8%	11.4%
Hong Kong	136,188	10.6%	3.6%	3.5%
Australia	126,891	23.6%	3.3%	3.0%
Italy	113,466	2.3%	3.0%	3.2%
South Korea	100,699	103.7%	2.7%	1.4%
Other	1,294,336	9.9%	34.1%	33.9%
Total Overseas	3,792,004	9.0%	100.0%	100.0%

Another large visitor market for Canada is Canadian residents. Efforts made to encourage Canadians to "Buy Canadian", therefore keeping travel dollars within the country, seem to be working. The Travel Account compares total dollars spent within Canada by residents of other countries with total dollars spent internationally by Canadian residents. According to Statistics Canada, the 1993 Travel Account deficit showed a decrease of 9% over 1992. In 1994, the deficit was \$4.2 billion, down 30% over 1993. The decrease in 1994 was due partially to a decrease in total dollars spent internationally by Canadians. If total domestic and international spending by Canadians decreased by a lesser amount, this means that more was spent in Canada.

Tourism encompasses a wide variety of production and consumption activities which are inter-related with non-tourism activities. As a result, the tourism industry is difficult to measure. Wide-scale visitor studies measuring consumer demand are complex and expensive to undertake each year. It is therefore necessary to supplement periodic studies with estimated measures of the tourism industry. These estimates are based on various travel surveys by Statistics Canada, total border crossing counts by Canada Customs (direct entries), domestic and international economic conditions, and various domestic travel indicators.

BC Volume and Revenue Estimates

Tourism BC provides estimates on the number of visitors to the province each month, and on the total amount spent in BC by these visitors each quarter. In 1994, an estimated 25.65 million overnight trips were taken within BC, up 5.1% from 1993. Total spending by visitors on these trips was estimated at \$6.31 billion, up 8.5% from 1993.

In order to focus business and marketing strategies, Tourism BC divides visitors into geographic markets based on place of origin. These markets include BC, Regional, North American Long Haul, Asia/Oceania, Europe and Other International.

BC: BC residents supply the province with the largest number of visitors. As well, BC residents are the largest source of tourism revenue. In 1994, 17.25 million overnight trips, representing 67.3% of the total number of visitors, were taken in BC by BC residents. An estimated \$3.24 billion, representing 51.3% of total tourism revenue, was spent on these trips. Overnight visits by BC residents increased 4.1% in 1994, surpassing the growth rate of last year. Total spending on these trips increased by 6.1%, slightly lower than the increase in 1993.

Regional: The Regional market includes the provinces of Alberta, Saskatchewan and Manitoba; the Yukon and Northwest Territories; and the states of Alaska, Washington, Oregon, Montana and Idaho. This market provided the 2nd largest number of visitors to BC, and the 3rd largest contribution to tourism revenue. In 1994, 4.54 million overnight visitors, representing 17.7% of the total number, came to BC. \$1.18 billion, representing 18.7% of the total tourism revenue earned, came from Regional visitors. Both volume and revenue from the Regional market grew in 1994, with volume up 5.8% and revenue up 8.5% over 1993 figures.

North American Long Haul: The North American Long Haul market includes the remaining provinces and states not in the Regional market, as well as Mexico. In 1994, this market provided the 3rd largest number of visitors to BC, and the 2nd largest contribution to revenue. 2.78 million visitors, or 10.9% of the total, came to BC. \$1.27 billion, or 20.1% of total tourism revenue earned, came from the North American Long Haul market. Volume and revenue from this market also show growth rates higher than that of last year. In 1994, volume was up 6.1%, while revenue was up 9.5% over 1993 figures.

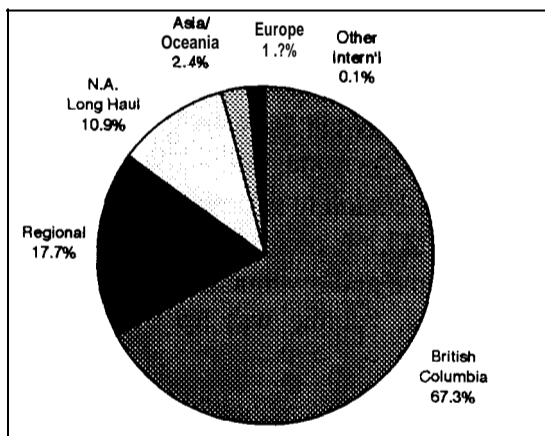
Summary of Overnight Volume and Revenue for Major Markets, 1990-1994

	1990		1991		1992		1993		1994	
	Volume millions	Revenue billions	Volume millions	Revenue billions	Volume millions	Revenue billions	Volume millions	Revenue billions	Volume millions	Revenue billions
BC	15.613	2.882	16.081	2.814	16.242	2.842	16.567	3.051	17.253	3.238
Regional	4.163	0.977	4.233	1.025	4.258	1.041	4.289	1.087	4.537	1.179
NA Long Haul	2.696	1.153	2.657	1.141	2.615	1.123	2.623	1.158	2.784	1.268
Asia/Oceania	0.484	0.247	0.480	0.252	0.504	0.271	0.539	0.302	0.622	0.366
Europe	0.297	0.151	0.325	0.171	0.340	0.183	0.375	0.210	0.426	0.248
Other Internat'	0.016	0.008	0.018	0.009	0.018	0.010	0.021	0.012	0.024	0.014
TOTAL	23.268	5.417	23.794	5.412	23.976	5.470	24.413	5.819	25.647	6.314

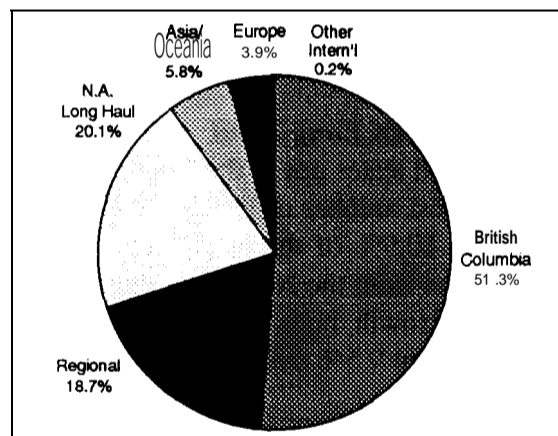
Market Share of Total Overnight Volume and Revenue (%s)

	1990		1991		1992		1993		1994	
	Volume millions	Revenue billions	Volume millions	Revenue billions	Volume millions	Revenue billions	Volume millions	Revenue billions	Volume millions	Revenue billions
BC	67.1	53.2	67.6	52.0	67.7	52.0	67.9	52.4	67.3	51.3
Regional	17.9	18.0	17.8	18.9	17.8	19.0	17.6	18.7	17.7	18.7
NA Long Haul	11.6	21.3	11.2	21.1	10.9	20.5	10.7	19.9	10.9	20.1
Asia/Oceania	2.1	4.6	2.0	4.7	2.1	5.0	2.2	5.2	2.4	5.8
Europe	1.3	2.8	1.4	3.2	1.4	3.3	1.5	3.6	1.7	3.9
Other Internat'	0.1	0.1	0.1	0.2	0.1	0.2	0.1	0.2	0.1	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

1994 Overnight Visitor Volume



1994 Overnight Revenue



Asia/Oceania: Asia and Oceania makeup the 4th largest market in terms of visitors to BC and spending in BC. In 1994, 622,000 visitors, came to BC, contributing \$366 million to the province's tourism revenue. These numbers were up 15.4% and 21.2%, respectively, over 1993.

Europe: Europe was the 5th largest market in terms of both visitors to BC and spending in BC. In 1994, 426,000 visitors came to BC from Europe, up 13.6% over 1993. These visitors contributed \$248 million to total tourism revenue in 1994, up 18.1% over 1993.

Other International: The Other International market comprises all overseas countries except those in Asia, Oceania, Europe and Mexico. These countries provided 24,000 visitors to BC, and contributed \$14 million to tourism revenue. Both visitors and spending was up in 1994 for residents of other international countries coming to BC. Volume increased by 14.3%, while spending increased by 16.7%, over 1993 figures.

Domestic Travel Indicators

Many domestic travel data sources available on a regular basis can serve as proxy, or substitute, measures of the tourism industry in BC. Tourism BC tracks regional travel volume each month through such sources as BC Ferries, Parks Canada, and the provincial Ministry of Transportation and Highways.

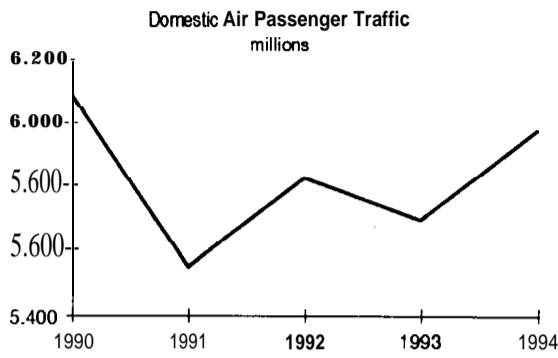
Domestic travel increased in 1994 for each indicator tracked. As well, all indicators except Coquihalla Highway volume showed increased growth rates over those of 1993. The following table shows the performance of each indicator. The second row of each shows the growth rates over 1993 figures.

1994 Domestic Travel Indicators

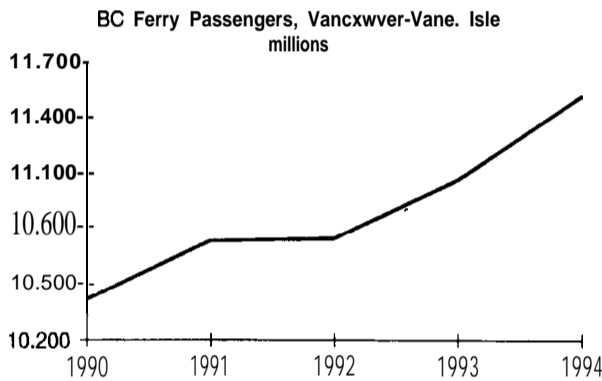
Jan	Feb	Mar	April	May	June	July	Aug	Sept	Ott	Nov	Dec	Total
Ferry Traffic - Port Hardy to Prince Rupert												
2,134 (12.1%)	1,709 18.4%	2,782 19.5%	3,283 20.7%	5,029 (2.6%)	9,884 0.1%	14,100 1.3%	14,583 (0.4%)	11,910 22.6%	2,138 (27.7%)	1,719 3.4%	3,797 35.5%	73,086 4.9%
Ferry Traffic - Vancouver Island to/from Vancouver (Routes 1, 2, 30)												
588,937 13.0%	580,178 5.1%	820,332 11.1%	851,691 2.0%	980,692 4.8%	1,050,069 4.5%	1,515,233 3.9%	1,611,530 0.3%	1,139,477 5.4%	1,881,725 0.9%	644,180 <0.1%	831,580 5.8%	1,516,586 4.2%
Rogers Pass (westbound passenger vehicles)												
38,198 11.6%	40,428 4.0%	67,950 19.9%	95,730 8.0%	130,050 3.4%	167,738 12.5%	357,125 11.7%	306,635 2.8%	188,828 9.6%	122,575 8.3%	47,676 1.1%	73,729 7.7%	1,844,662 8.2%
Coquihalla Highway (paid passenger vehicles)												
107,359 23.8%	89,896 (3.0%)	186,864 8.4%	199,706 1.4%	243,184 6.4%	240,464 6.5%	388,672 2.8%	383,807 (0.1%)	269,713 6.4%	206,516 0.6%	107,207 (6.7%)	132,574 4.3%	2,503,842 3.6%
Domestic Air Passenger Arrivals and Departures - Vancouver												
411,117 4.0%	378,850 (1.6%)	483,547 3.7%	444,321 (0.4%)	503,206 5.8%	550,922 6.3%	589,229 7.3%	649,302 7.0%	561,434 6.9%	510,613 6.7%	421,580 6.0%	493,639 4.7%	5,977,560 4.9%
Provincial Campground Attendance (number of people)												
5,939 136.7%	5,789 4.6%	17,514 44.5%	50,778 37.2%	239,338 6.1%	383,338 5.2%	856,861 14.2%	812,419 5.3%	345,843 0.4%	56,682 10.9%	8,458 77.4%	2,758 (22.1%)	2,785,715 8.3%
Accommodation Revenue (unadjusted, \$Millions)												
47.203 14.2%	53.170 10.3%	88.839 11.4%	59.515 9.3%	74.088 6.2%	90.937 9.7%	121.514 12.4%	133.309 13.1%	109.149 13.6%	73.955 16.1%	49.739 16.0%	51.414 20.4%	930.832 12.4%

Tourism Trends in British Columbia

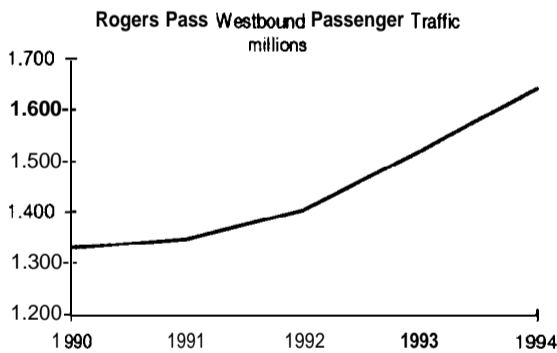
The following set of charts on domestic travel indicators for BC show trends over the years 1990 to 1994



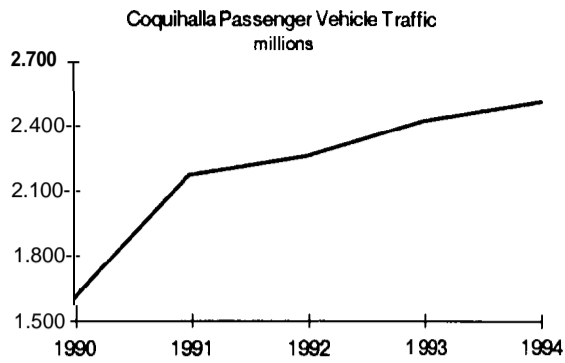
Domestic air passenger traffic through Vancouver International Airport increased 4.9% in 1994, over 1993. The Canadian Tourism Research Institute reports that this was largely due to an increase in both charter and business travelers. Passengers for 1994 totalled 5.97 million, down 1.8% from 1990 volume.



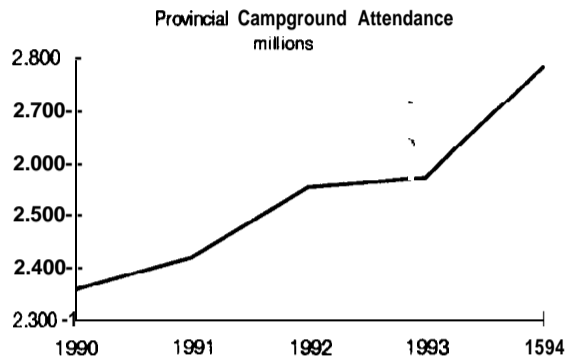
BC Ferry passenger traffic between Vancouver and Vancouver Island has increased each year since 1990. 1994 passengers grew at a greater rate than they did the previous year, with volume up 4.2% over 1993. A total of 11.52 million people used this service in 1994, up 10.6% since 1990.



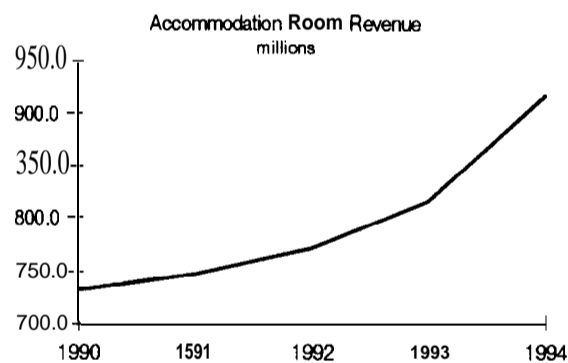
Westbound passenger traffic also continues to increase through *Rogers Pass*. 1994 traffic increased by about the same amount in 1994 as it did in 1993. A total of 1.64 million passengers travelled through the Pass in 1994, up 8.2% over 1993 passengers. Volume as a whole has increased 23.6% since 1990.



Passenger vehicles on the *Coquihalla Highway* increased 3.6% in 1994, over 1993. This route has become a major east-west connector for the province. Passenger vehicles for 1994 totalled 2.50 million, up 56% since 1990.



Provincial campground attendance showed a significant increase over 1993 attendance, as volume was up in every month except December. Total attendance for 1994 was 2.79 million, up 7.5% over the 1993 total. This has been the largest rate of increase since 1990. Campground attendance has increased by 18.2% since 1990.



Accommodation room revenue is seen as an excellent proxy for tourism trends since virtually all of its revenues are from visitors. Accommodation room revenue totalled \$919.1 million in 1994, up 12.3% over 1993 revenue. Since 1990, accommodation room revenue has increased by 25.49%. While south-western BC dominates this industry in terms of volume and revenue, its position has eroded somewhat, indicating greater regional distribution of benefits. Hotels, motels, fishing lodges and vacation rentals are included in total revenue,

Primary Sources of International Visitors to BC

Statistics Canada keeps a monthly record of all visitors entering British Columbia through international borders. Although the Canadian market (including BC) provides the largest number of visitors to the province, this market is difficult to track as travelers are not necessarily crossing an international border when they enter. Since Tourism BC has more information on international visitors, it is able to take a closer look at them.

Because visitors can have a large impact on the provincial tourism economy, trends and market shares must be determined in order to focus business and marketing activities. The six international nations providing the most visitors to BC continue to be the United States, Japan, the United Kingdom, Germany, Hong Kong and Australia. In total, these nations supplied 92.5% of the international visitor volume in 1994. Volume from Taiwan and South Korea continue to grow. In 1994, these nations provided the 7th and 8th largest number of visitors to BC. The following table shows the top 15 nations in terms of visitors to BC, as well as the growth rates over the past year, and market shares for 1994 and 1993.

International Visitors to British Columbia

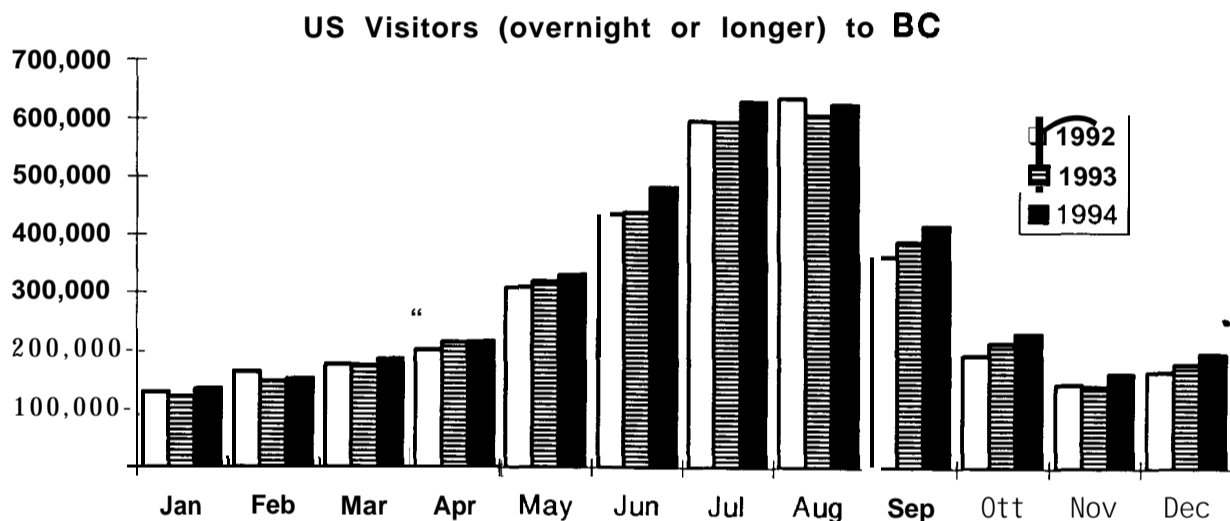
Inbound from:	Visitors	94/93 % Change	1994 % of Internat'l Market	1993 % of Internat'l Market
United States	3,757,724	6.30/o	77.4%0	78.70/o
Japan	274,174	9.80/o	5.7%	5.60/o
United Kingdom	168,436	16.70/o	3.5%	3.20/o
Germany	131,789	12.1%0	2.70/o	2.60/o
Hong Kong	80,522	5.6%	1.7%0	1.79'0
Australia	73,555	26.5%	1.5%0	1.3%0
Taiwan	49,935	41.9?40	1.0%0	0.80/0
South Korea	36,301	106.6'0%0	0.7%	0.4%0
Netherlands	24,648	12.80/o	0.5%	0.5%0
Mexico	22,380	4.9'?/0	0.59'0	0.5%
New Zealand	21,033	7.5%	0.4?40	0.4%
Switzerland	19,308	2.2%	0.4%	0.4%
France	17,563	29.10/0	0.4%	0.3%
Philippines	10,128	-0.40/0	0.2%	0.2%
Italy	9,413	1.60/0	0.2%	0.2%
Other	155,344	9.1%	3.2%	3.20/o
Total International	4,852,253	8.00/0	100.0%0	100.0%

The Top Six International Markets

THE UNITED STATES

The United States is British Columbia's largest source of international visitors. Total overnight volume in 1994 was 3.58 million, representing 77.4910 of international visitors to BC. Volume was up in each month compared to 1993, with the largest growth in November, December and January. In total volume increased 6.3% over the 1993 volume, following a marginal increase of less than 1.0% last year. This compares with a slight decrease in US visitors to Canada as a whole during the same period.

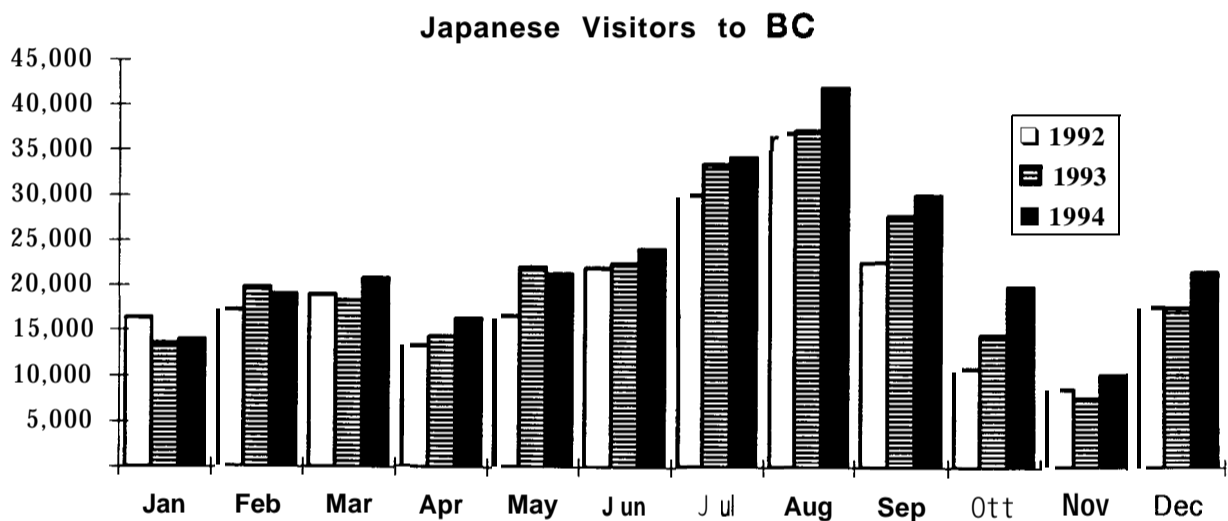
The United States is the largest source of international tourism revenue for BC. Tourism revenue from US residents was just over \$1.0 billion in 1994, representing 61.3% of international tourism revenue. This figure was up 12.190 over 1993 revenue.



JAPAN

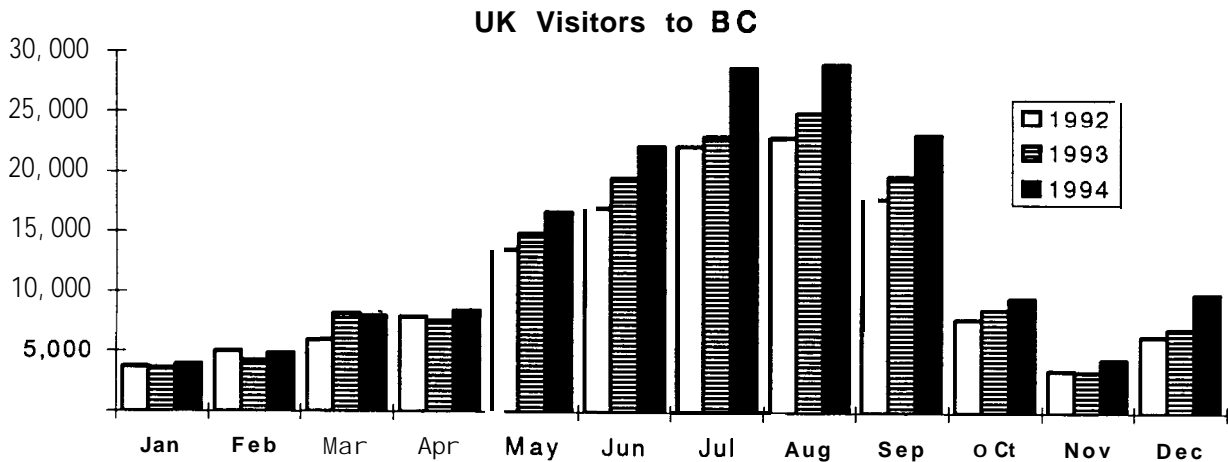
Japan is BC'S second largest source of international visitors, and maintains its position as the largest overseas visitor market, with 274,174 traveling to BC in 1994. In addition, BC is the most popular destination in Canada for Japanese visitors, with almost half (48.7%) of all Japanese visitors to Canada coming to BC. Japanese visitors to BC represented a slightly larger share of total international visitors in 1994 - 5.7% compared to 5.6% in 1993. In addition, volume increased 9.8% over 1993 visitors.

Similar to last year, exceptional growth took place in the shoulder season. October, November and December showed the largest growth rates over 1993, with volume increasing 36.4%, 32.5% and 22.2% respectively. Factors affecting this could be the improved profile of BC'S golf and ski products, and changes in the Japanese work life which allow for more flexible vacation scheduling. February and May were the only months showing small decreases over the same months last year.



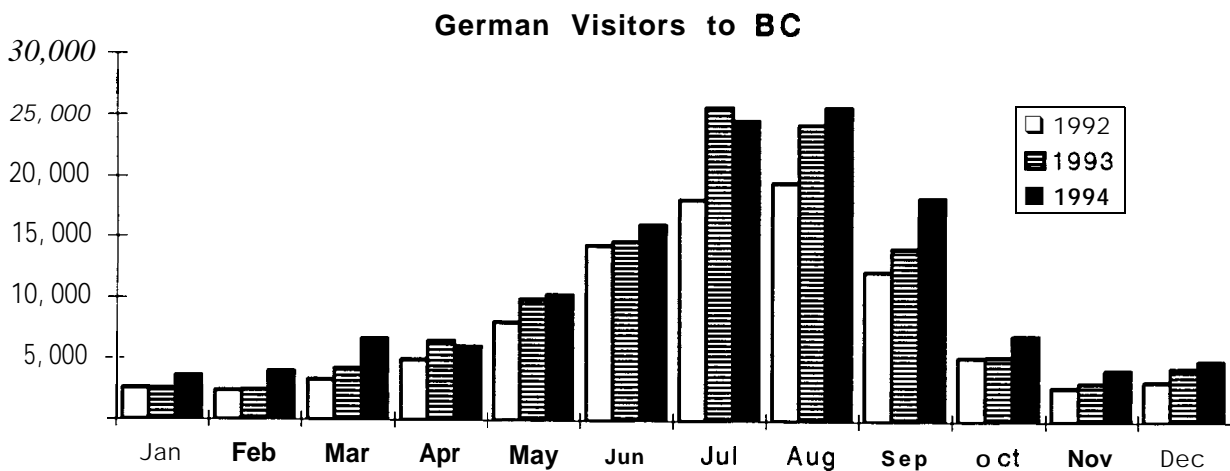
UNITED KINGDOM

The United Kingdom is the source of the third largest group of international visitors to BC after Japan and the US. In 1994, 168,436 people visited BC from the UK, representing 3.5% of the international market. Volume was up 16.7% over volume in 1993. Growth in volume was also up over last year, making 1994 the third consecutive year for increases in the growth rate over the previous year. BC greatly outperformed the national average as the number of visitors to Canada decreased by 1.3% in 1994 over 1993.

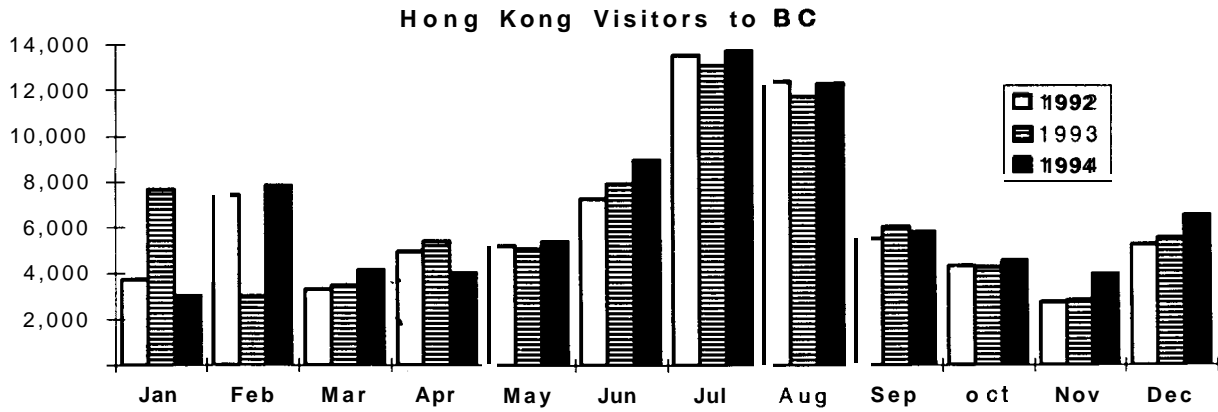


GERMANY

Germans make up the fourth largest group of international visitors to the province, representing 2.7% in 1994. Germany continues to show remarkable increases in its number of visitors to BC. In 1994, 131,789 people visited the province, up 12.1% over the 1993 figure. BC also outperformed Canada in the German market, as volume to Canada saw an increase of only 3.1% in 1994.

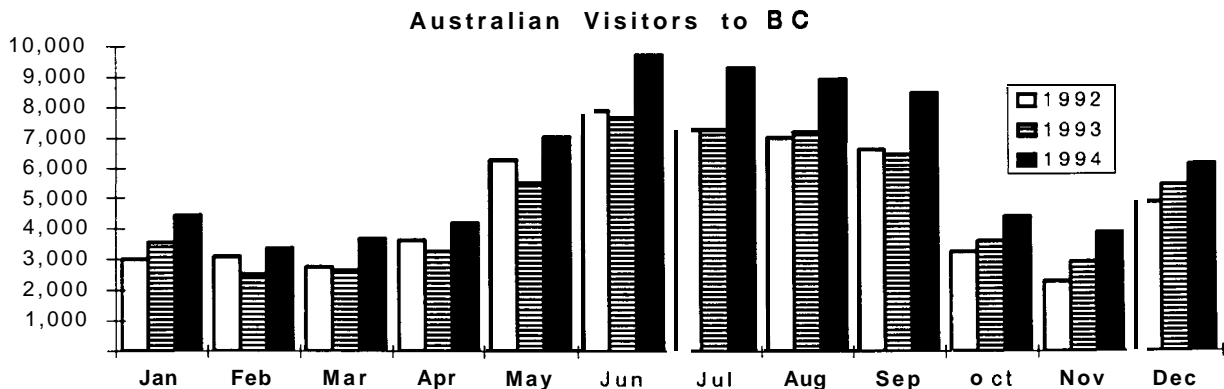


Hong Kong travelers are the fifth largest group of international visitors to British Columbia. In 1994, 80,522 visitors, representing 1.7% of the overseas number, travelled to the province. This showed an increase of 5.6% over 1993 volume, a considerable improvement over a yearly growth rate of 0.4% in 1993. 1994 growth brings the total number of visitors close to a 1989 peak level of 80,924, established after the announcement of the colony's future re-unification with mainland China.



AUSTRALIA

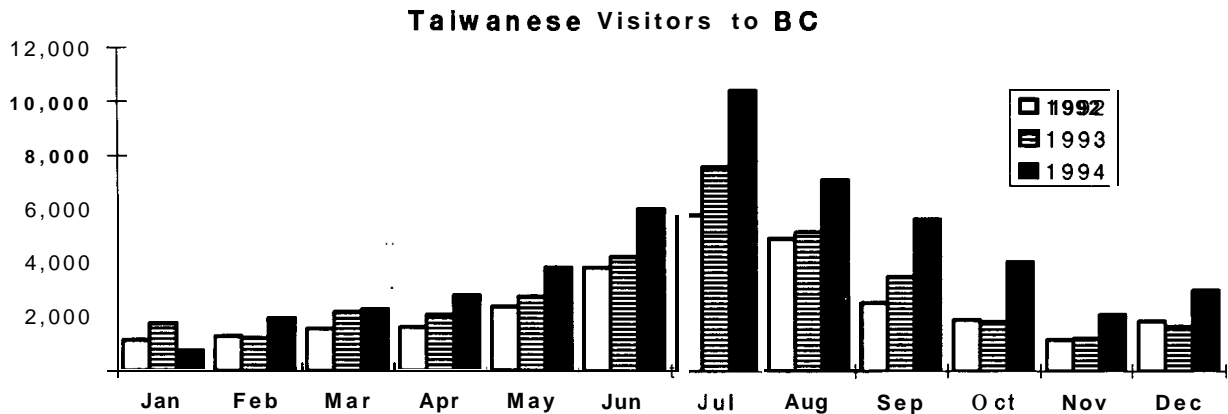
Australian visitation continues to be erratic each year. Strong growth in 1989 (23.0%) was followed by two years of declining entries (-1.6% and -8.0%). 1992 and 1993 showed improvements, with entries up 3.490 and 0.3%, respectively, in each year over the previous year. In 1994, visitation showed the largest improvement since 1987, with entries increasing 26.5% over the 1993 number. This improvement was large enough to bring visitors in 1994 (73,555) above a previous peak level of 61,526 in 1989. While Canada as a whole has outperformed EC for growth in visitors over the past few years, BC outperformed Canada in 1994. At 1.5% of total international visitors to BC, Australia is the sixth largest international market.



Emerging International Markets

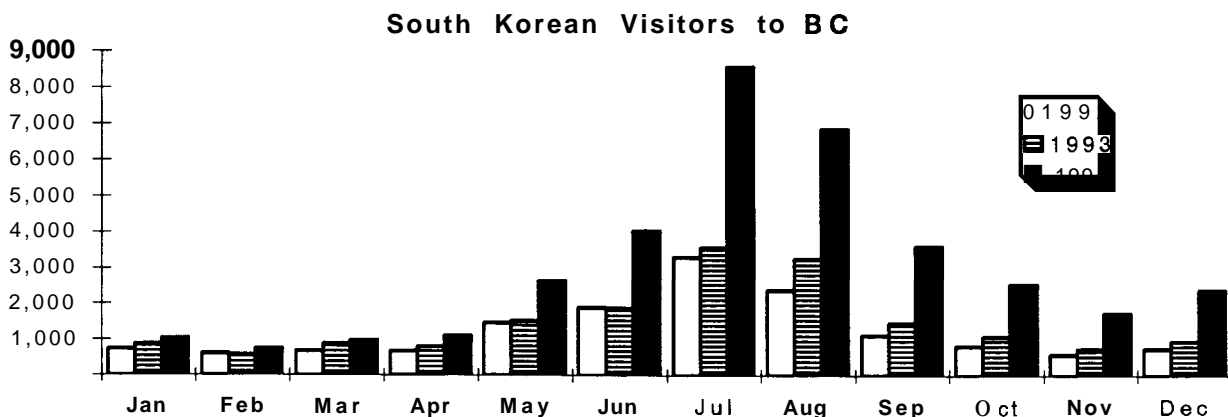
TAIWAN

British Columbia has seen growth of over 209.0% in visitation from Taiwan since 1989. In 1994, 49,935 visitors came to BC, up 41,990 over 1993 visitors. International market share increased from 0.8% in 1993 to 1.0% in 1994. BC as the first point of entry to Canada has also grown considerably - from almost 40% in 1989 to 70.0% in 1994. Much of this growth can be attributed to improved airline connections between Taiwan and British Columbia.



SOUTH KOREA

Prior to 1989, Korean outbound travel was limited as travel visas were only granted for officially sanctioned missions benefiting national development. As a result, annual outbound trips were in the range of 500,000 for a population of 43 million. In 1988 and 1989, most of these controls were removed. Since then, phenomenal growth has taken place. Between 1989 and 1994, visitation to BC has grown 296.4%, to reach 36,301 entries. In 1994 alone, visitation increased 106.6%. Growth in recent years has allowed South Korea to jump ahead of both the Netherlands and Mexico in its share of BC's international visitor market.



The Economic Impact of Tourism in British Columbia

Visitors to BC are served by more than 12,000 businesses in the province, many of which are small businesses. Because tourism only constitutes a proportion of the consumption in goods and services from these businesses, it is difficult to determine the total contribution of the tourism industry to the economy. In the past, the industry has only been measured from the *demand* side, examining goods and services which tourists demand through their activities and expenditures. Another approach to measuring the economic contribution of the tourism industry is from the *supply* side, measuring the outputs of businesses which supply goods and services for tourists. The supply-side measurement is common with most other industries. For example, the forestry industry measures its contribution in the value of board feet of lumber produced.

The measurement of tourism from the supply-side was undertaken for the first time in 1991, making direct comparisons of the economic value of tourism with other industries possible. On the following pages, the measurement and value of tourism's Gross Domestic Product, export earnings and employment are described.

Gross Domestic Product

British Columbia's Gross Domestic Product (GDP) measures the value of all goods and services produced within BC. GDP is the standard measurement of industry performance world-wide, and is the strongest indicator of direct economic impact. One way to determine GDP is to total the *value added* of all output in the BC economy. The total value of any individual output is therefore made up of raw materials and value added, or GDP.

A simple example of GDP is presented in the table below. It shows that a \$20 restaurant meal contributes \$9 to the provincial GDP. The remaining \$11 is not included as GDP accruing to the restaurant meal, as it was included earlier in the GDP to produce the inputs.

GDP created from a \$20 restaurant meal:

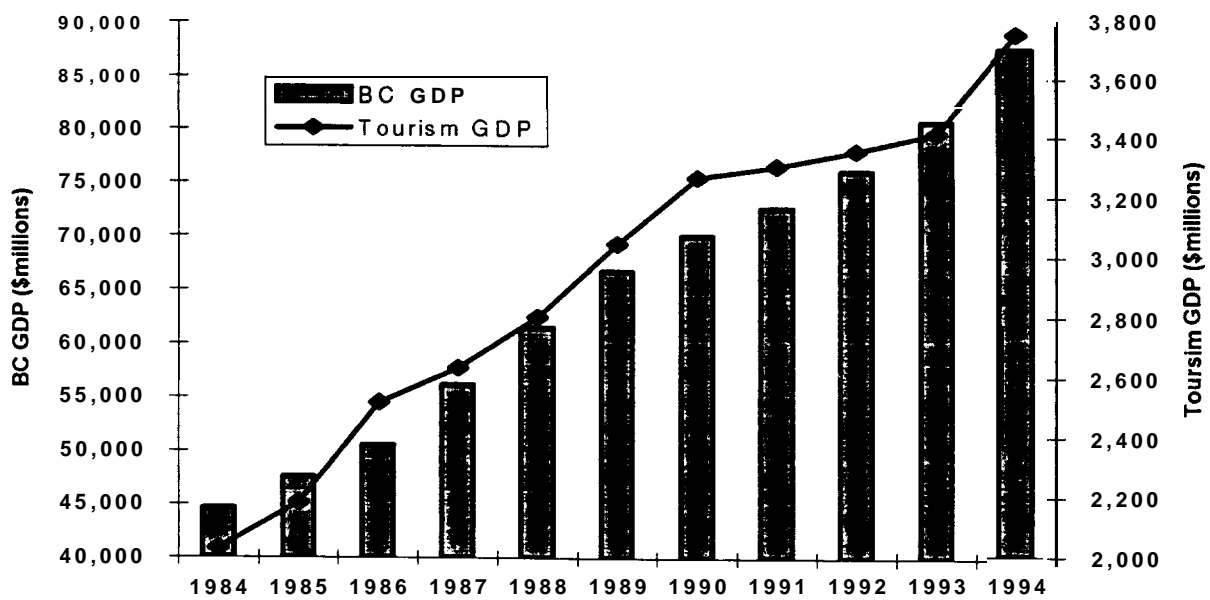
Inputs (raw materials)	
vegetables, meat, spices, electricity	\$11
GDP (value added)	
wages (payments to labour)	
interest, depreciation (payments for capital)	
profit (payments to owners)	\$9
Restaurant Meal (revenue received)	\$20

Tourism BC, together with the Ministry of Government Services, developed an accredited methodology to estimate Tourism GDP, therefore determining the economic contribution of tourism to the BC economy. In developing the methodology, economists asked different categories of businesses to estimate the proportion of their revenues which were attributable to tourism. These proportions are used to calculate Tourism GDP in each business category. The values are then added to give total Tourism GDP. The following table and chart provide BC and tourism GDP figures from 1984 to 1994.

Table: BC and Tourism GDP. 1984 to 1994 (current \$)

Year	BC GDP millions	% change	Tourism GDP millions	% change	Proportion of Tourism to BC GDP
1984	44,624		2,030		4.5% ⁰
1985	47,554	6.6% ⁰	2,186	7.7%	4.6%
1986	50,492	6.2%	2,521	15.3% ⁴⁰	5.0%
1987	56,164	11.2% ⁴⁰	2,638	4.6% ⁰	4.7%
1988	61,450	9.4%	2,809	6.5%	4.6%
1989	66,757	8.6%	3,055	8.8% ⁴⁰	4.6%
1990	70,030	4.9%	3,276	7.2%	4.7%
1991	72,591	3.7%	3,313	1.1% ⁰	4.6%
1992	76,087	4.8%	3,364	1.5% ⁰	4.4%
1993	80,671	6.0% ⁰	3,424	1.8% ⁰	4.2% ⁰
1994	87,198	8.1% ⁰	3,750	9.5%	4.3%

Chart: BC and Tourism GDP. 1984 to 1994 (current \$)



Note: scales are not the same

In 1994, tourism contributed \$3.75 billion to provincial GDP, up 9.5% over tourism GDP last year. BC GDP was \$87.20 billion, up 8.1% over last year's figure. Between 1984 and 1994, Tourism GDP grew on average 8.5% annually. 1986, at 15.390, was an exceptional year for growth as a result of Expo '86.

From the chart, it is clear that tourism GDP follows the same trend as that for the province as a whole. This could be because the state of the BC economy directly impacts the largest visitor market - BC residents.

Tourism Earnings

Tourism in BC generated revenues of \$6.31 billion in 1994. This was an increase of 8.5% over revenues generated in 1993. Tourism BC divides revenues into two broad categories: export earnings and import substitution earnings.

EXPORT EARNINGS

Because the tourism industry sells goods and services to international residents, it is considered an export industry. In 1994, tourism earned \$1.66 billion in foreign exchange, making it the third largest export industry in BC, after softwood lumber and pulp. Key tourism export markets are the United States, contributing \$1.02 billion, and overseas countries such as Japan, the United Kingdom and Germany. In total, overseas countries contributed \$628 million. The overseas market continues to outperform the US in earnings growth. While US annual earnings increased 12.1% over earnings in 1993, overseas earnings increased 17.2% over the same period.

IMPORT SUBSTITUTION EARNINGS

When Canadian residents decide to travel within BC as opposed to another province or nation, their tourism expenditures stay in BC. These earnings are called *import substitution earnings* by Tourism BC, since Canadians are substituting travel in BC, for travel in other provinces or nations. In 1994, Canadians spent \$4.65 billion traveling in British Columbia, up 5.7% over similar spending last year. Of this total, \$3.24 billion was attributed to BC residents, and \$1.42 billion to the rest of Canada.

Tourism Employment

Job creation is another important measure of the value of tourism in BC. Between 1992 and 2001, the average annual growth rate in tourism related occupations has been projected to be 3.1%. In comparison, the average annual growth rate in all employment is projected to be 1.9%. Currently, one in nine people in the BC labour force work in tourism related jobs.

It has been estimated that approximately 220,400 employees in 1994 worked in tourism related services such as accommodation, transportation, restaurants, entertainment and recreation. This number is up an average 4.3% each year over the past two years.

Regional Tourism Association Reports

British Columbia has nine tourism regions. The following is a summary of the year, as submitted by each of the regional associations. A map outlining each region can be found on the back page of this publication.

Vancouver Hand

The increasing number of attraction developments outside of the Greater Victoria area continues to encourage visitors to explore up-island. Visitors can then exit the Island via Nanaimo to Vancouver or Tsawassen, via Comox to Powell River and the Sunshine Coast, or via Port Hardy through the Inside Passage to Prince Rupert.

The current interest in health and fitness has influenced many travelers to partake in outdoor recreation holidays. This trend can be seen in the growth at many hiking, whale-watching and kayaking operations on the Island.

One potentially large growth area for visitors to Vancouver Island is the "snow bird" market. A great number of retired couples from the prairie provinces have begun to winter in Victoria, as the high exchange rate prohibits extended stays in the US.

The overseas market to Vancouver Island and the Gulf Islands continues to grow steadily, due to Tourism BC'S overseas marketing department and the increased awareness of the islands as an international vacation destination.

Vancouver, Coast and Mountains

The Vancouver, Coast and Mountains area covers approximately 55,000 square kilometers, and includes the largest share of the provincial population at 53 per cent. The region is divided into 5 diverse destination areas: Greater Vancouver, Sea to Sky Country, the Sunshine Coast, Fraser Valley Heritage Country and Rainbow Country.

Vancouver, Coast and Mountains is a popular destination year-round, with excellent touring and outdoor activity opportunities, coupled with quality attractions and areas of historical interest. Vancouver, the gateway to southwestern BC and the province, is internationally recognized as being one of the world's prettiest cities. However, Vancouver offers not only scenery, but every type of accommodation, restaurant and shop imaginable, in a safe and clean environment.

The Sunshine Coast, a great getaway and fishing destination, offers picturesque coastal communities overlooking the Strait of Georgia. Whistler Resort has once again been nominated by Snow Country Magazine to be the #1 Ski Resort in North America, but is also increasingly popular as a four-season destination to visitors from around the globe. Now that the Duffy Lake Road (Highway 99) has been paved, thousands of visitors are attracted to an alternate and scenic route to the interior, or on a circle tour that encompasses many different geoclimatic zones

including fjords, mountains, glaciers, ranchland, river gorges and lush agricultural land. "Farm tours" are gathering interest, especially with the Japanese tour market, and the Vancouver Coast and Mountains region is exploring new avenues in "agritounsm".

Okanagan-Similkameen

An abundance of attractions, lakes, orchards, vineyards and activities, coupled with long warm summers and natural beauty, are found in the region of the Okanagan-Similkameen. Located six hours driving time from Calgary, four hours from Vancouver and five hours from Spokane or Seattle, most of the region's marketing targets Alberta, Washington and British Columbia. Tourism marketing for the region focuses on the agri-tourism product, including wineries, orchard tours, technical tours and all aspects of the fruit industry. Skiing, golfing, soft adventure, meeting and incentive travel, and festivals and events are also premier products offered in the region.

Located in south central BC, the Okanagan-Similkameen Tourism region enjoyed a very strong tourism year. Apex Resort, Silver Star Mountain Resort and Big White Ski Resort, enjoyed increases in destination skier.. visits. Golf product continues to expand, and cohesive golf marketing efforts are emerging, Various golf properties reported an increase in business this year and a very busy season overall.

The Fall Okanagan Wine Festival, which runs for 10 days throughout the valley, saw an increase of over 12,000 visitors and has incorporated a Spring Wine Festival in May.

The Okanagan-Similkameen Tourism Association continues to pursue the lucrative motor coach and group tour market in North America and overseas markets, with primary emphasis on Japan and the United Kingdom. Several tour operators are now selling packages to this region as part of their Canadian tourism product.

Kootenay Country

Kootenay Country is nestled between the BC Rockies to the east, the Okanagan Valley to the west, Highway 1 to the north and the US border to the south.

Kootenay Country offers an abundance of natural beauty in a pristine wilderness setting. Three mountain ranges (the Purcells in the east, the Selkirks in the centre and the Monashees in the west), a myriad of lakes (Kootenay, Arrow, Slocan, Champion and Christina), provincial parks (Monashee, Champion Lakes, Cody Caves, Kokanee Glacier and Valhalla) as well as mountain meadows, valleys, rivers and streams, all offer unmatched beauty and an abundance of four season outdoor activities.

Kootenay Country's main focus is on attracting fully-independent travelers from Washington, Alberta and British Columbia who enjoy touring, sightseeing and/or outdoor pursuits such as golfing, skiing, fishing and hiking. The shoulder seasons are increasing in popularity, especially May and September.

1994 saw a record number of visitors enjoying the provincial parks, guest ranches and hot springs. There were more skiers, both alpine and nordic, compared to the previous season, golfing had one of its best seasons ever, and many courses had higher than average traffic in the fall shoulder months of September and early October. Interest in historical sites continues to grow, benefiting the many popular heritage attraction buildings, communities and ghost towns.

Special Events such as the Creston Blossom Festival, Kaslo Jazz Festival, Canadian Mountain Bike Championships in Rossland and the Grand Forks International Baseball Tournament were very successful in attracting out of town visitors in 1994.

High Country

The High Country region is located in BC'S southern interior and extends east towards the Rockies. It is most widely known as the prime travel corridor between Vancouver and the Canadian Rockies, as well as for its wealth of outdoor activities. Expansion has been in a wide range of guided, active outdoor vacations, including backcountry adventures and guest ranches. Sun Peaks resort near Kamloops has undergone significant expansion and is drawing international interest.

Increasing interest in outdoor recreation from all markets has impacted positively on the High Country. The region is home to two national parks -- Mount Revelstoke and Glacier -- near Revelstoke, as well as two showcase provincial parks -- Wells Gray and Mt. Robson -- which are becoming well known overseas as prime outdoor destinations. Popular vacations, including houseboating, freshwater fishing, rafting and lakeside relaxation, continue to fuel increases from key close-by markets.

Cariboo Country

Located in the central interior of BC, the Cariboo-Chilcotin-Coast area, or Cariboo Country, is bounded by the Pacific Ocean to the west, and the Cariboo Mountains to the east. Scenic campgrounds, rustic guest ranches, wilderness resorts, lodges and communities (many located near one of over 8,000 lakes!) are linked together on one of two main routes: the Gold Rush Trail (Highway 97) from north to south, and the Freedom Highway (Highway 20) from west to east. Improved access via Highway 99 through Lillooet continues to attract visitation from the Lower Mainland, and has inspired international clientele looking for a scenic route between Whistler, the Interior and Jasper.

The region is increasingly packaged by tour operators and agents using BC Rail Passenger Services as the mode of entry. This region is also becoming more popular, not only with BC residents, but with visitors from Europe and the United States. Barkerville showed a strong increase in visitors over last year, while the majority of operators experienced steady growth.

North by Northwest

The largest region in the province, North by Northwest stretches from Mount Robson Park in the east, to the Queen Charlotte Islands in the west and to the Yukon border to the north.

Because of the popularity of Alaska as a destination and increased awareness developed by the Regional Tourism Association and other consortiums promoting the north, visitation by business travelers as well as tourists is flourishing. Highways in the region continue to be improved, with Highway 37 north to the Yukon border drawing increasing amounts of traffic due to its scenery, wilderness and access to the Yukon and Alaska.

The North is experiencing substantial increases in soft adventure enthusiasts and the development of new experiences and services throughout the region appears to be increasing as well. Communities are being encouraged to undertake an inventory of their available product to promote longer stays.

Peace River-Alaska Highway

The Peace River Alaska Highway region represents one quarter of British Columbia's total land mass and is approximately 135,000 square kilometres in size. It is characterised by rugged wilderness, vast plains, rolling foothills and deep river valleys. Bordered by Alberta to the east, the Rocky Mountains to the west and south, and the Yukon and Northwest Territories to the north, the area is rich in natural resources, abundant in energy and strategically located for trade.

In 1994, the region's seventy-one properties (with 2,310 rooms) earned \$20.6 million in accommodation room revenue, amounting to 2.2% of the province's total room revenue. This represents an increase of **5896** over 1993. The region's 19 hotel properties earned more revenue than all other accommodation categories, approximately \$12 million in 1994.

The 200th anniversary of the journey of Alexander Mackenzie took place in 1993, with the north-eastern region of British Columbia very much involved in its promotion and celebration. This year Jean Chretien, Prime Minister of Canada, recognized and proclaimed the Peace River as a vital and integral part of our Canadian heritage. This is the infamous route followed by Alexander Mackenzie and his crew in 1789. Having this route declared as a Heritage River creates a great opportunity for co-operative tourism development between Canada, the provinces and the industry itself.

The Alaska Highway is less of a lure to today's traveller than in the past. Many of the forefathers who took part in the building of the highway have passed on. The highway is no longer the lure - Alaska is!

Consumer trends are changing and we are marketing to a younger generation. Motor coach companies are finding that trends are moving towards shorter trips, niche markets, incentive travel and leisure packages. Therefore, a three to four week motorcoach ride to Alaska becomes less appealing. More people are traveling by cars, vans and motorhomes.

Soft adventure, sightseeing, native culture and eco-tourism are 'buzz' words for new tourism opportunities. These changes will bring a new focus of tourism traffic to northern British Columbia to experience our region's untapped wilderness. Already, the Association has seen an increase in the number of requests for these kinds of tourism products and leisure experiences in the region. In addition, arts, culture and heritage are rapidly becoming popular tourism products and the Association recognizes that work needs to be done to highlight and expand on these experiences and opportunities.

BC Rockies

The BC Rockies region of British Columbia, located in the province's southeast corner, exemplifies the scenic attributes of the Super, Natural British Columbia image.

Ski and golf resorts, hot springs, back-country lodges and attractions of national significance form the backbone of the year-round visitor industry.

Primary local markets for this region are Alberta, Saskatchewan, eastern Washington and Idaho. Overseas markets are principally Germany and the United Kingdom, with point of entry being the Calgary International Airport.

A continuing rise in the level of sophistication of community and property marketing endeavors, matched by steady product expansion, has resulted in increased visitation throughout the early 1990s.

New festival and event co-ordination, community reservations systems, co-operative packaging and sales initiatives are responsible for much of the success achieved in 1994.

Heritage continues to gain prominence within the Rockies visitor industry with planning underway on many new major projects like the Sullivan Mine Interpretive Centre in Kimberley. Fort Steele Heritage Town and the Canadian Museum of Rail Travel in Cranbrook are currently the mainstays of the region's diverse heritage product.

A. Tracking Reports

ACCOMMODATION ROOM REVENUE REPORTS

Room revenues are summarized at the provincial, development region, regional district and urban centre levels. Annual summary reports are also produced.

TOURISM FACTS

A brief summary document outlining the economic contribution of the tourism industry to British Columbia. Tourism GDP, export earnings, revenue, visitation and employment are highlighted.

QUARTERLY TOURISM INDICATORS

A one-page quarterly summary sheet highlighting growth in visitor markets and provincial indicators.

MONTHLY TOURISM INDICATORS

A monthly summary sheet showing volumes and growth rates in direct entries and visitors to BC, as well as in domestic travel indicators.

Where To Find Tracking Reports

These reports can be found at BC Statistics, the Pacific Rim Institute of Tourism and all Regional Destination Marketing Organizations.



B.' Tourism Publications

TOURISM HIGHLIGHTS 1993

World, national and provincial tourism highlights, such as volume and revenue figures, and economic performance reviews.

TOURISM DATA SOURCES STUDY

Consists of two documents:

- *Tourism Data Sources Reference Manual* - describes 119 sets of tourism related time-series data.
- *Tourism Data Gap Analysis* - outlines the research options and alternatives available to the Tourism Division to meet Ministry tourism performance information standards.

EGO TOURISM - NATURE/ADVENTURE/CULTURE STUDY

A study commissioned by Canadian Heritage, Industry Canada, British Columbia, Alberta and the Outdoor Recreational Council of BC to assess potential markets for ecotourism in BC and Alberta. The study consists of six reports:

- *Main Report*
- *Ecotourist Mail Survey*
- *Consumer Telephone Survey*
- *Travel Trade Survey Results*
- *Ecotourism Market Literature Review*
- *A Detailed Look at Two Popular Activities: Wildlife Viewing and Cultural Experiences*

Where to Find Tourism Publications

The majority of our publications can be found in your local public library, as well as at the following locations:

BRITISH COLUMBIA

Victoria:

BC Parks Library, 2nd Floor, 800 Johnson Street	387-3974
Legislative Library, Government Documents Division, Parliament Buildings	387-6510
Ministry of Environment, Lands and Parks Library, 780 Blanshard Street	387-9745
Ministry of Employment and Investment Library, 712 Yates Street	387-0341

Tourism Association of Vancouver Island, 302-45 Bastion Square	382-3551
Victoria Business Information Centre, 890 Douglas Street	384-2432
BC Statistics, 553 Superior Street	387-1502
University of Victoria McPherson Library	721-8274
Camosun College Library, 3100 Foul Bay Road	370-3622

Vancouver:

Statistics Canada, Vancouver Office	(800) 663-1551
Tourism Vancouver	682-2222
Tourism Association of Vancouver, Coast and Mountains, 204 - 1755 West Broadway, Vancouver	739-9011
Industry Canada (BC), 900-650 West Georgia Street, Vancouver	666-5000
Canada-BC Business Information Centre, 601 West Cordova Street, Vancouver	775-5525
Pacific Rim Institute of Tourism, 930-555 West Hastings Street, Vancouver	682-8000
Vancouver Public Library, Government Documents Division, 750 Burrard Street, Vancouver	331-3600
Simon Fraser University WAC Bennett Library, Burnaby	291-3869
British Columbia Institute of Technology Library, 3700 Willingdon Avenue, Burnaby	432-8371
Capilano College Library, 2055 Purcell Way, North Vancouver	984-4944
Douglas College Library, 700 Royal Avenue, New Westminster	527-5467
Vancouver Community College Library, 250 West Pender Street Vancouver	443-8340
Langara Campus Library, 100 West 49th Avenue, Vancouver	323-5462

Regions:

Okanagan-Similkameen Tourism Association, 1332 Water Street, Kelowna	860-5999
First Nation's Tourism Association, 201515 Highway 97 South, Kelowna	
Okanagan College Library, 100 KLO Road, Kelowna	
Kootenay Country Tourist Association, 610 Railway Street, Nelson	352-6033
East Kootenay Community College Learning Resource Centre, Cranbrook and Invermere	
High Country Tourism Association, 2-1490 Pearson Place, Kamloops	372-7770
Cariboo College Library, Kamloops	
Cariboo Tourism Association, 190 Yorston Street, Williams Lake	392-2226
North by Northwest Tourism Association, 3840 Alfred Avenue, Smithers	847-5227
University of Northern British Columbia Library, Prince George	

College of New Caledonia, Enterprise Development Centre, 125 - 1577 7th Avenue, Prince George

Peace River Alaska Highway Tourist Association, 10631- 100th Street, Fort St. John

785-4424

Rocky Mountain Visitors Association, PO Box 10, Kimberley

427-4838

Ministry of Skills, Training and Labour, Business Resource Centre, 155 Skinner Street, Nanaimo

Masaspina College Library, 900 Fifth Street, Nanaimo

North West Community College Library, RR#2, Site 49, C- 1, Smithers

ALBERTA

Alberta Tourism Library, 5th Floor, 10155- 102nd Street, Edmonton

University of Calgary, Management Resource Centre, 301 Scurfield Hall, 2500 University Drive NW, Calgary

ONTARIO

Canadian Tourism Research Institute, 255 Smyth Road, Ottawa

(613) 526-3280

Tourism Canada, Tourism Reference & Documentation Centre, 4th Floor East, 235 Queen Street, Ottawa

Tourism Documentation Centre, Georgian College of Applied Arts & Technology, 1 Georgian Drive, Barrie

QUEBEC

Centre D'Etudes du Tourisme, Case Postal 8000, Succursale A, Montreal

British Columbia Tourism Regions

