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The Best Place for What? British Columbia Economic Profile and Forecast

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November 2009



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WESTERN CANADA'S ECONOMY

Monitoring economic activity in the four western provinces is a priority for Canada West Foundation. One provincial economic profile and forecast report is produced each year for British Columbia, Alberta, Saskatchewan and Manitoba. These reports are supplemented by extensive media commentary and presentations on the western Canadian economy.

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1. OVERVIEW

The troubles in the US economy have hit all regions of Canada as demand for our exports has declined significantly. This has been especially true for British Columbia, where the collapse of the housing market south of the border has created great difficulties for the forest industry.

Aren't you tired of reading that story over and over?

For some reason, everywhere you look, the problems of the BC forestry and related activities industry¹ are the focus of what analysts say about the province's economy. (The provincial government often joins in.) While forestry, a key export, plays a crucial role in some areas of the BC interior and employs a workforce of nearly 60,000, it represents about 5% of BC's economic production. This is why the province has beaten the national average in terms of economic growth and job creation from 2002 to 2007 while the value of its forest product exports shrank by 14%. There is a lot more to BC than just two-by-fours. As the Business Council of British Columbia puts it, "[BC's] impressive economic expansion from 2003 to 2007 was largely underpinned by robust domestic activity rather than a buoyant export sector."

BC is a forward-looking and unique province in many regards. Its trade infrastructure is resolutely turned towards Asia, where most of the current and upcoming growth is taking place. It is a hotbed for green and renewable energy technologies. It was the first jurisdiction in North America to follow Europe and impose a carbon tax. And it is probably the province with the best

¹ In accordance with BC Stats' approach, we use *Forestry and related activities* to represent the combination of the forestry and logging industry (a primary activity) and the wood product and paper product industries (which belong in the manufacturing sector).

West

relationship with its First Nations, even if the government's Recognition and Reconciliation proposals have been put on hold.

Above all, BC benefits from its unique natural setting and the high quality of life associated with both its cities and its more rugged areas. This has allowed it to become a tourism hub both for international visitors and for Calgarians looking for a playground. Tourism is nothing to sniff at: it creates jobs (not just dish washer-type ones) and brings consumers in from outside the province. In addition, BC is a migration magnet and has successfully absorbed various waves of newcomers, becoming one of the most diversified societies in Canada.

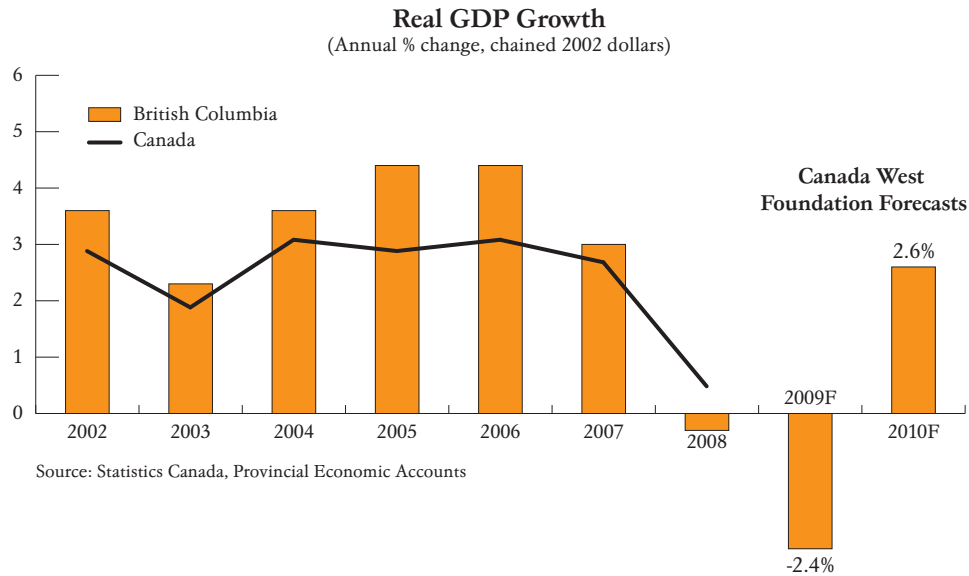
To paraphrase a number of observers, the 2010 Winter Olympic and Paralympic Games in Vancouver/Whistler will help "solve some of BC's underlying problems for a while". As this report hopes to show, the "for a while" is true: the Olympic-driven growth burst will be short-lived. However, BC's economy of today does not have as many problems as forestry-focused headlines would suggest. It is home to a solid consumer base, has a long list of infrastructure projects underway and benefits from the presence of many innovative firms.

Just like the rest of the country, economic activity in BC began a steady decline in the fall of 2008 and had just begun to turn around 12 months later (Central 1 Credit Union 2009b). As a result, there is a consensus among forecasters that 2009 will mark the first significant decline for BC's economy since 1982. (The modest decline of 0.3% in 2008 was too close to call.) Although recessions are not great times for making forecasts, we confidently expect BC's economy to recover before the end of 2009, followed by solid growth in 2010. So far in 2009, most economic indicators, such as employment and investment, position BC's slowdown in the middle of the provincial pack. In 2010 growth will return, but this growth will not all be the result of a temporary Olympic boost.

Readers must keep in mind that there are risks associated to this forecast. Among them are the unknowns regarding the timing and strength of the

West

Figure 1



economic recovery in the US, which is BC's largest export market. Canada West Foundation is forecasting that BC's real GDP will decline by 2.4% in 2009 and grow by 2.6% in 2010 (see Figure 1).

Last year, BC's government unveiled a new slogan for the province: no longer modestly "beautiful", BC is now confidently "the Best Place on Earth". Unanswered, though, is the following question: the best place for what? There is a wealth of options available, and while diversification is always a good thing, hopefully circumstances will lead BC toward a few fields where it will become the champion it has the potential to be.

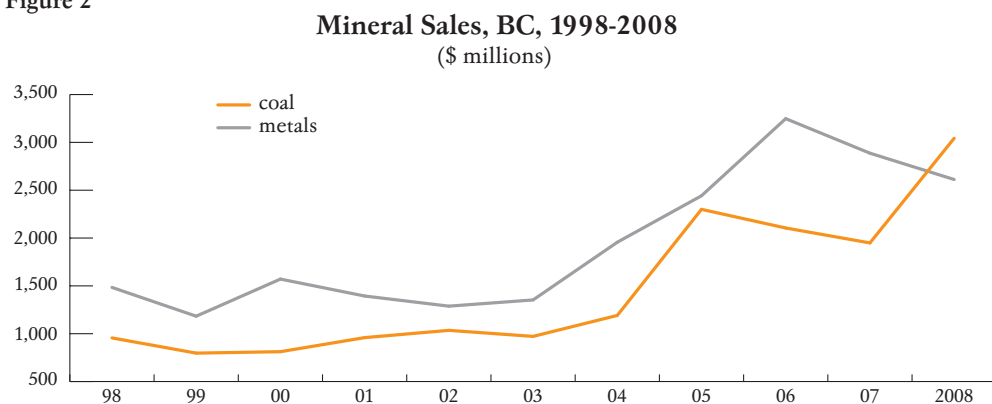
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2. INDUSTRIAL PRODUCTION

Mineral Resources and Utilities

Amid all the recessionary gloom, natural gas was one of BC's few relative success stories this year. With the emergence of massive shale plays in the Southeast US, which caused gas surpluses and depressed prices in North America, the discovery of vast shale gas reserves in the Horn River region was a bit of a mixed blessing. However, this challenge became an opportunity as plans for a liquefied natural gas (LNG) import terminal in Kitimat were switched to an export terminal project, with strong backing by Korea Gas Corp., the world's largest gas importer. Gas producers also received a boost from the provincial government's temporary royalty rebate for new wells, a timely measure given that the number of drilled wells has been trending down, from a peak of 1,202 in 2005 to 805 in 2008 (Canadian Association of Petroleum Producers 2009). Overall, other than uncertain market conditions, bad news in the industry was limited to the scare caused by repeated pipeline bombings near Dawson Creek.

Figure 2



Source: BC Ministry of Energy, Mines and Petroleum Resources.

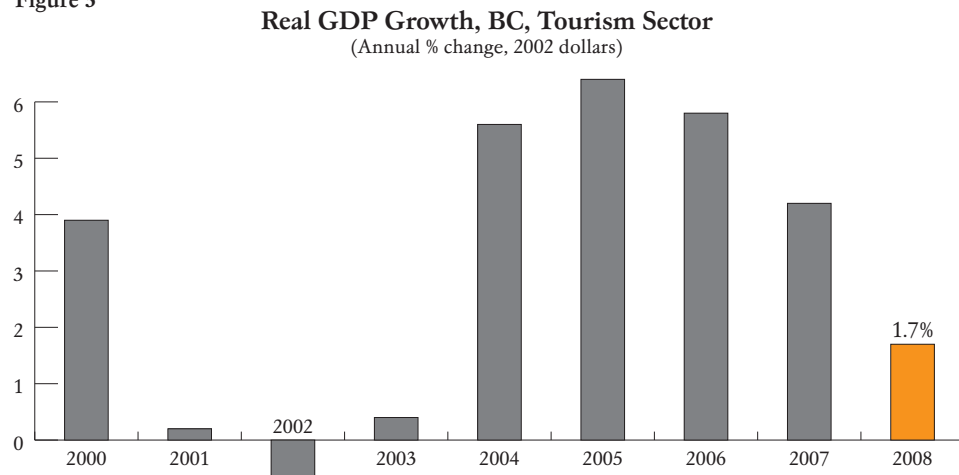
In the mining industry, coal production increased in response to demand in Japan and South Korea. In 2008, the value of coal sales jumped 56%, reaching a higher level than that of mined metals for the first time since 1985 (see Figure 2). So far in 2009 though, low coal contract prices have made export results less spectacular.

BC has become more dependent on electric power imports, especially from the US. The province posted a net electricity trade deficit during three of the last five years (BC Stats 2009c). In response to the government's goal of electric self-sufficiency by 2016, hydro electric development has hit its stride, with projects of all sizes and types, ranging from the expansion of the Revelstoke Dam, to the development of the new Northwestern Transmission Line near Terrace. Some uncertainty was introduced into the industry when the BC Utilities Commission went against the prevailing trend and rejected part of BC Hydro's long-term acquisition plan for renewable energy.

Tourism

BC's tourism sector grew 1.7% in 2008 (see Figure 3). It outpaced the rest of the province's economy for a fifth straight year despite the fact that since 2001 visits from the US have been in a steep decline. In 2008, tourism growth turned out to be the slowest since 2003. Conditions softened at the end of the

Figure 3



Source: BC Stats, *Business Indicators*, July 2009

year, resulting in a modest annual increase of 0.7% in room rental revenue. US tourism in Vancouver Island showed the most significant decline.

So far in 2009, tourism results do not point to a pick-up in growth, which is not surprising given the H1N1 flu pandemic and forest fires near Kelowna. Over the first five months of 2009, room revenue in the Vancouver area was down 9.8% compared to the same period in 2008 (BC Stats 2009a, 2009b). Obviously, a short-term surge in tourism is expected as a result of the Winter Games, but the key will be the long-term increase resulting from Vancouver's international visibility. While this can only have a positive impact for BC's tourism industry, one must keep in mind that the Winter Games have a more limited global audience than the summer ones.

Forestry and Manufacturing

Total sales of the BC manufacturing sector were lower by \$3 billion (-6.5%) in 2008. More than one-third of the decline was the result of a 15.9% drop in wood product sales. Nearly all manufacturing industries posted lower sales results in 2008, one of the notable exceptions being computer and electronic

Figure 4

Value of Manufacturing Sales, BC (\$ millions)

	2007	2008	% chg	2008 Jan-July	2009 Jan- July	% chg
All manufacturing industries	42,526	39,759	-6.5	23,514	18,742	-20.3
Food	5,479	5,471	-0.1	3,047	3,193	4.8
Wood products	8,071	6,788	-15.9	4,148	2,653	-36.1
Paper	5,843	5,401	-7.6	3,250	2,506	-22.9
Primary metal	3,180	2,845	-10.5	1,783	1,177	-34.0
Machinery	2,304	1,998	-13.3	1,191	911	-23.5
Non-metallic mineral products	2,001	1,834	-8.3	1,082	777	-28.2
Beverage and tobacco products	1,210	1,217	0.5	701	688	-1.8
Computer and electronic products	1,444	1,635	13.2	943	666	-29.4
Transportation equipment	1,564	1,357	-13.2	835	579	-30.7
Plastics and rubber products	1,328	1,105	-16.8	658	531	-19.4
Furniture	1,067	1,054	-1.2	640	516	-19.2
Printing and related activities	903	832	-7.9	482	356	-26.1
Other activities*	8,133	8,223	1.1	4,754	4,189	-11.9

* Some industries are not available from Statistics Canada due to confidentiality.

Source: Statistics Canada, CANSIM Table 304-0015.

products (+13.2%). Over the first seven months of 2009, manufacturing sales have declined further (see Figure 4).

BC's forestry and related activities were already in bad shape and on a downward slope when the US housing market collapsed in 2008. Lower US demand for BC lumber just made things worse for the forest sector, which has seen its share of the province's GDP, employment and exports decline systematically from its heyday 50 years ago. The decline was more pronounced during the last decade, which saw BC lumber exports cut by half.

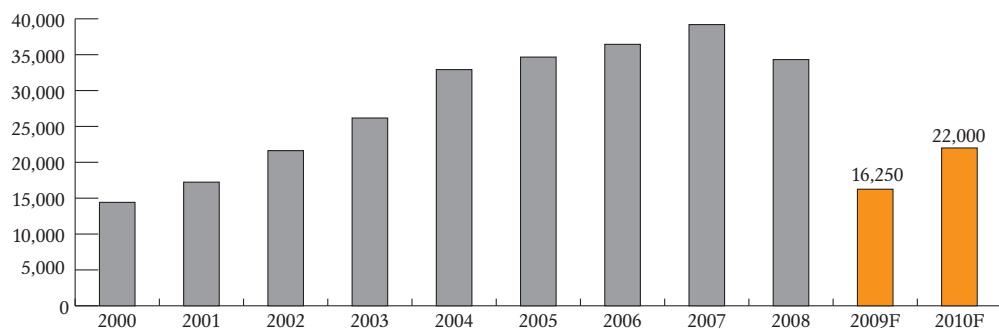
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3. CONSTRUCTION AND INVESTMENT

While not as spectacular as its Alberta neighbour, the BC housing market has been in an upturn for most of the decade. This came to an end in 2008. Housing starts declined from 39,000 units to 34,000 units (-12.4%) in 2008 and the Canada Mortgage and Housing Corporation forecasts a further cut by half to 16,000 in 2009, then a bounce back in 2010 albeit not near their peak from earlier this decade (see Figure 5). Home resales dropped by a third, from 103,000 in 2007 to 69,000 in 2008 (see Figure 6), with CMHC forecasting an immediate return to growth in 2009. Demographic pressures will sustain demand for existing housing but at a discount: BC will be the only province (apart from Alberta) where average residential resale prices will decline in 2009 (see Figure 7) (Canada Mortgage and Housing Corporation 2009).

Figure 5

Housing Starts, BC, 2000-2010

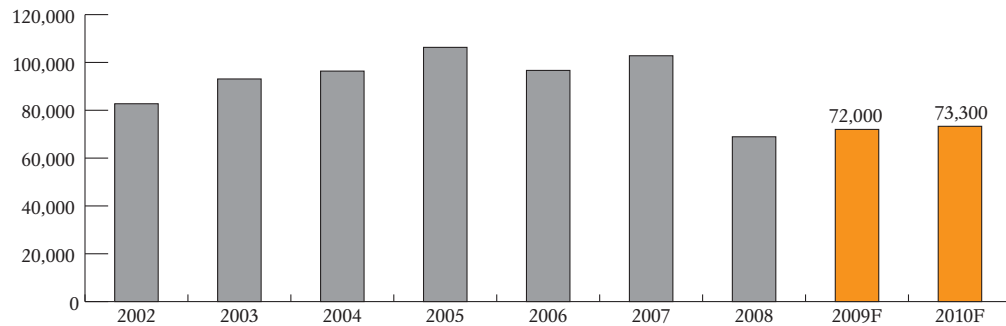


NOTE: 2009 and 2010 figures are CMHC forecasts.

Source: Canada Mortgage and Housing Corporation, Housing Market Outlook: Canada Edition, Third Quarter 2009.

Figure 6

Residential Resales, BC, 2002-2010

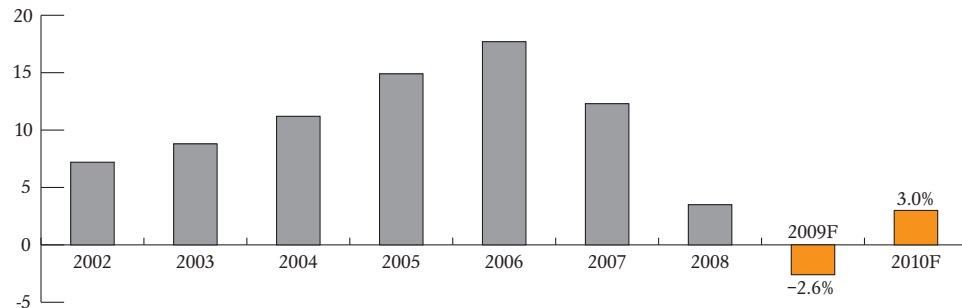


NOTE: 2009 and 2010 figures are CMHC forecasts.

Source: Canada Mortgage and Housing Corporation, Housing Market Outlook: Canada Edition, Third Quarter 2009.

Figure 7

Annual Percentage Change in Average Residential Resale Prices, 2002-2010 (%)

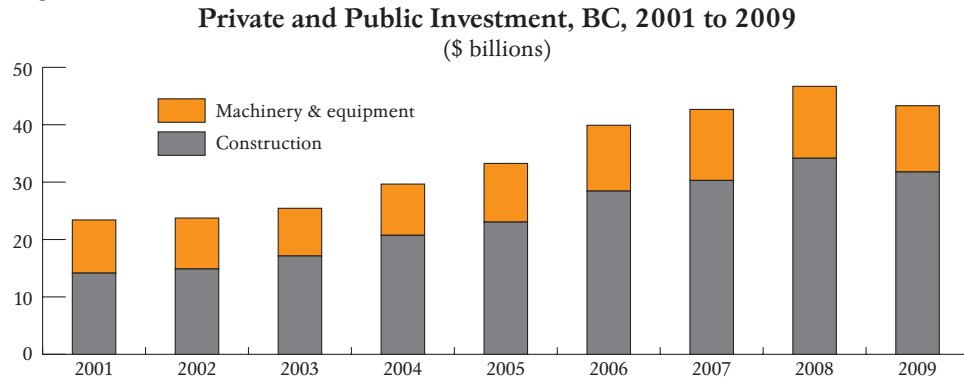


NOTE: 2009 and 2010 figures are CMHC forecasts.

Source: Canada Mortgage and Housing Corporation, Housing Market Outlook: Canada Edition, Third Quarter 2009.

Things are a bit brighter on the non-residential side of construction. At \$31.8 billion, construction intentions for 2009 were 7.0% lower than in 2008 but remained high when compared historically (see Figure 8). Most of the decline in 2009 is due to the winding-down of major Olympic-related infrastructure projects such as the \$2.0 billion Canada Line extension to the Vancouver SkyTrain and the \$600 million improvements to the Sea-to-Sky Highway between Vancouver and Whistler. Some other large projects, with a less direct

Figure 8



NOTE: The value for 2008 is preliminary actual and the value for 2009 is intentions.
Source: Statistics Canada CANSIM Table 029-0024.

connection to the Olympic Games, were also recently completed, including the Vancouver Convention Centre (\$883 million) and the Golden Ears Bridge (\$808 million) between Maple Ridge and Langley.

This will not mark the end of large-scale construction in BC, but it appears that the private sector will take a larger role. According to the *British Columbia Major Projects Inventory*, as of June 2009, 893 capital projects, worth an estimated \$188 billion over their complete lifespan were planned or underway in BC, an increase of 11% compared to the same date the previous year. Among the projects started in 2009, there are two that stand out: the Port Mann Bridge and Highway 1 Improvements Gateway Program (\$2.5 billion) and the Westhills Green residential project in Langford, near Victoria (\$2.0 billion) (BC Ministry of Small Business, Technology and Economic Development 2009). In addition, significant capital investments are being undertaken by BC Hydro and the BC Transmission Corporation as part of their multi-year plans to refurbish and expand energy infrastructure.

4. EXPORTS

The beginning of the recession at the end of 2008 hampered trade globally, as lower demand joined forces with the resurgence of protectionism. Over the first seven months of 2009, BC's exports are down 23% from the same period in 2008 (Figure 9). Most of the decline is the result of lower exports of lumber (-28%), pulp (-30%) and natural gas (-44%). Other provinces (most notably, Alberta and Ontario) have experienced much steeper drops in the level of their exports in 2009. The Canadian dollar once again rising above 90 cents US this past summer is certainly not what the doctor ordered.

While the US represents an important market for BC exports, especially in the case of forest products, BC is in fact the province the least dependent on the US as an export destination. BC ships 8% of Canada's total exports, but is the source of 17% of Canada's exports to non-US countries. Between 2000 and 2008, the value of BC's exports to the US was reduced by \$4.6 billion (or 21%), mainly the result of the recent US housing market collapse. Over the same period, sales to other countries jumped, especially China (an increase

Figure 9



NOTE: 2009 preliminary based on first seven months of the year
Source: Statistics Canada, CANSIM series V847738

of \$1.3 billion, or 171%), South Korea (+\$1.0 billion), Brazil, Mexico and the Netherlands (+\$0.3 billion each). Higher exports of coal and copper were behind many of these increases. In fact, in 2008, coal replaced lumber as the top export category for BC. Ongoing negotiations on a free trade agreement between Canada and South Korea, one of the growing markets for BC coal, could make this new order permanent.

However, not all of BC's export growth comes from resources. According to the BC Business Council, while resource-based products constitute the core of BC's exports, there have been "significant increases in export shipments of high technology products, machinery and equipment, plastics and a host of other non-resource goods" (Finlayson and Peacock 2009).

5. NEW INDUSTRIES AND RESEARCH

With three-quarters of its economy concentrated in service industries (the highest ratio in the West), BC's economy is gradually moving away from resource extraction and processing. New and exciting sectors are appearing above (or still just below) the horizon, some of which preserve a link with the province's more traditional sectors.

Environmental technology is being developed in BC in a number of diverse areas. Bioteq, a company located in Vancouver, uses eco-friendly processes to turn industrial wastewater into clean water and other by-products, both with commercial value. Energold Drilling offers environmentally and socially sensitive drilling services to the mining industry. Burnaby's Day4Energy has a patented electrode technology allowing it to market solar power to a mass clientele.

There are also further interesting prospects in the information technology sector. A number are located in the Lower Mainland, such as Kodak Print On-Demand Solutions in Burnaby (formerly CREO), which provides software for printers, or Strangeloop Networks, which manufactures accelerators for Web systems. In addition, Kelowna's "Silicon Vineyard" has attracted many startups, the most famous probably being Club Penguin, an online playground for preteens started as a shoestring operation. It was purchased by Disney for \$700 million US in 2007.

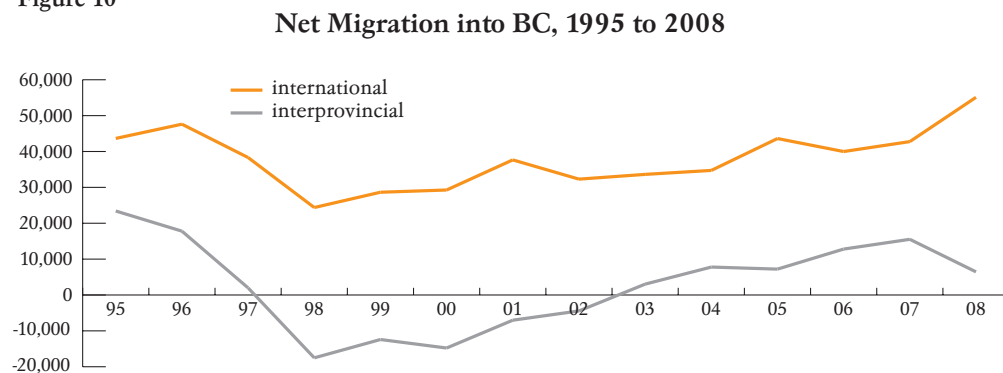
And then there is the film industry. Vancouver is the third largest film and television production centre in North America after California and New York. The industry directly employs 20,000 people and over 10,000 people indirectly. Last year, 260 productions were shot in BC, injecting over \$1.0 billion into the economy. Recent movies and television series shot in BC include *Fantastic Four*, *Juno*, and *Stargate*. The industry is now morphing to include new media formats for existing and upcoming types of electronic entertainment, creating the challenge of ensuring that BC has an adequate supply of talent to maintain growth in this rising sector.

West

6. POPULATION

BC has long been a major point of entry to Canada for international immigrants. In the late 1980s, net international migration outranked natural increase (that is, births minus deaths) as the main source of population growth. Net international migration into BC has grown consistently since then, while net interprovincial migration has been more volatile, sometimes negative depending on the circumstances, the most recent one being Alberta's oil boom of a few years ago (see Figure 10).

Figure 10



Source: Statistics Canada (Cansim Tables 051-0017 and 051-00377).

In 2008, net international migration into BC grew by 28% from the previous year to reach a record level of 55,000 net migrants. While net interprovincial migration went in the opposite direction that same year, it has been trending up somewhat since 2000. Almost all international immigration is concentrated in the Lower Mainland region, while interprovincial migrants settle in other areas, including the Okanagan and Vancouver Island.

The high level of international migration is an asset for BC. Not only does it reflect its long-established links to Asian countries and the multicultural facets of its population, it also demonstrates the quality of life enjoyed by BC residents,

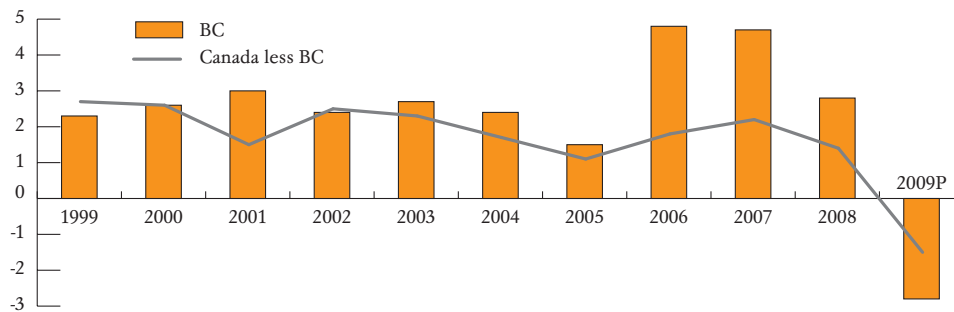
especially in the cities, which are the main pole of attraction for international immigrants. In a study released in July, Wisconsin-based *Next Generation Consulting* ranked Victoria and Vancouver as first and third respectively among the Canadian cities that young professionals consider the best places to live and work. Factors considered by respondents included earning potential, lifestyle cost and many elements having to do with fun. So much for Victoria's reputation for stodginess! (Next Generation Consulting 2009)

7. LABOUR MARKET

From 2003 to 2008, BC created jobs at a faster pace than the rest of the country. This story has been flipped on its head so far in 2009: BC is now bleeding jobs faster (-2.8%) than the average of all the other provinces (see Figure 11). If we measure those job losses starting from October 2008, which was the month before national job numbers started trending down, BC employment has fallen 2.3%, with only Ontario (-3.1%) and Alberta (-2.8%) worse off. This is somewhat of a shock for British Columbians, given that they “took a pass” on the last recession in 1992-93, during which employment rose 5.5% in BC while it fell in all other provinces.

Figure 11

Employment Growth, BC and Rest of Canada 1999 to 2009
(% change)



NOTE: 2009 preliminary based on first eight months of the year.
Source: Statistics Canada, CANSIM Tables 282-0002, 282-0007

The last time the unemployment rate in BC was this high was at the beginning of 2004. Since last October, BC’s unemployment rate has risen from 5.2% to 7.8% but increases have been somewhat similar in other provinces. As a result, BC remains the province with the fourth-lowest unemployment rate (but the highest in the West) just like at the beginning of the recession. Furthermore, the province’s unemployment rate has been relatively stable over the last few months.

From an industry perspective, BC was the western province where job losses were the most widespread, with 11 sectors showing declines, compared to seven in Alberta and Manitoba and five in Saskatchewan (where job losses have been minimal). The BC industries most severely hit in terms of jobs lost between July 2008 and July 2009 were manufacturing (35,000 jobs, or -17.5%), construction (31,500 jobs, or -13.5%) and transportation (14,400 jobs, or -10.9%). In the smaller resource and utility sectors, job loss numbers were smaller but still significant in percentage, with declines adding up to 13.5% and 22.6% respectively. However, some BC sectors did experience healthy job creation over that one-year period, the main ones being trade (+8.8%) and agriculture (+9.2%). It is worth noting that among the jobs that remain, there has been a gradual shift from private-sector jobs to self-employment, which means that the overall "quality" (if there is such a thing) of jobs has declined (Business Council of British Columbia 2009).

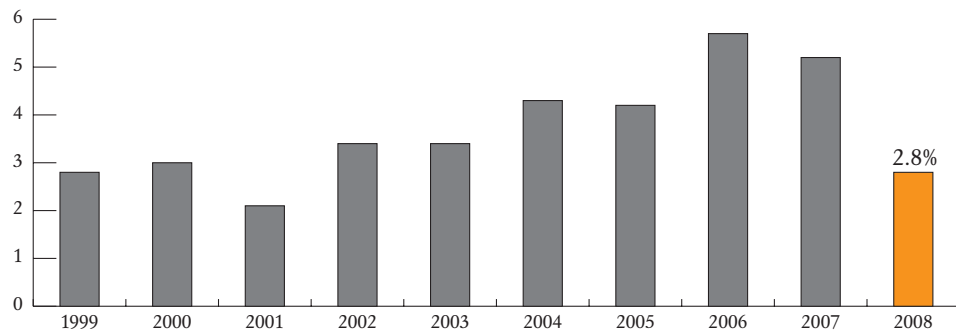
In recent months, job losses have been more modest in BC. Although the corner has not yet been turned, things look better than at the beginning of 2009. The Winter Games will generate a temporary blip of job creation during the course of the event itself, followed by a return to normal. The key question: what will the "new normal" be like?

8. CONSUMER SPENDING AND PRICES

Labour income in BC (the sum of wages, salaries and supplementary labour income) grew 5.6% in 2008, a slight slowdown compared to the 6.5% rate observed in 2007, and the smallest gain since 2003. BC wage rates grew 2.8% in 2008, in line with the national average of 2.9%. At \$798 per week, BC wage rates are slightly below the national average of \$811 and have been so since 2002. As BC consumers saw their earning prospects moderate, they ratcheted the growth in their spending down to 2.8% in real terms in 2008 (see Figure 12). Spending on durable goods (such as cars, furniture and household appliances) actually declined (-0.4%) in 2008 for the first time in more than a decade.

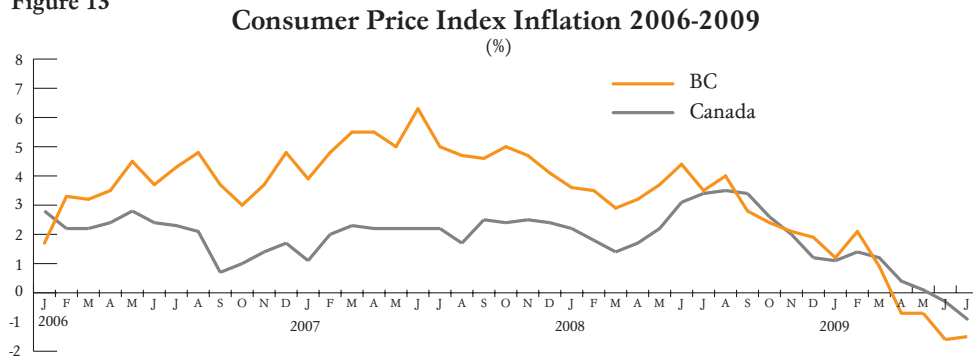
Figure 12

Personal Expenditure 1999-2008 (annual % change, chained 2002 dollars)



Source: Statistics Canada, CANSIM series V15855941

Figure 13



Source: Statistics Canada, CANSIM Series V41690973, V41692462

Consumer inflation averaged 2.1% in BC in 2008, higher than the 1.8% rate reached in 2007 but still below the national average of 2.3%. Inflation has been lower in BC than in Canada every year but one since 1996. Recently, this pattern endured when, as a result of a drop in natural gas prices, the national inflation rate ended up in the negative range for the first time since 1994 – BC prices turned out to decrease even more than Canada-wide ones (see Figure 13).

9. PUBLIC FINANCES

Over the last year or so, managing provincial finances in Canada has become very similar to Olympic biathlon: not only do governments have to go down the slippery slope of recession, they also have to stop from time to time to aim their economic forecasts at some target, a peculiarly moving one to boot. Very few hit the mark. In BC's case, the exercise was even more perilous in 2009 because the province was first out of the gate, with a budget presented on February 17 as economists still had precious little data available for assessing the damage from the recession. By the time of the September budget update, which itself followed a spring election, the economic and revenue forecasts released by Finance Minister Colin Hansen in February were in need of substantial revisions.

The September update shows that provincial revenue will decline from \$38.3 billion in 2008-09 to \$37.6 billion in 2009-10, mainly due to lower taxation and natural resource revenue (see Figure 14). Expenses, however, will not decline, growing from \$38.3 billion in 2008-09 to \$40.1 billion in 2009-10 as the government invests heavily in infrastructure projects to sustain the economy. This means that after posting a modest surplus of \$78 million last year, BC will fall into a \$2.8 billion deficit this year (including a forecast allowance), with a return to surpluses projected to take place only in 2013-14. The government has prudently re-adjusted its aim, but it will take some time to assess the impact of the update on the province's wallets and minds.

Figure 14

Provincial Revenue, BC (\$ millions)

	2008-09 Actual	2009-10 Estimate*	Change from 2008-09 to 2009-10
Taxation Revenue	18,197	17,217	-980
Natural resource revenue	3,848	2,577	-1,271
Other revenue	7,389	7,672	283
Contributions from the federal government	5,989	7,250	1,261
Commercial Crown corporation net income	2,905	2,892	-13
Total revenue	38,328	37,608	-720

* Based on September 1 Budget update.

Source: BC September Budget Update – 2009/10 to 2011/12, page 10

Beyond numbers, the budget update also grabbed the headlines because the government announced its intention to harmonize the provincial sales tax to the federal GST, joining a movement started a few months earlier by Ontario. Such a move, according to TD Bank, is “a tough political decision because it shifts the burden of taxation from businesses to consumers. Politically, it’s a challenging choice, but economically, it’s the right one” (CBC News 2009). The federal government will provide transition funding for the Harmonized Sales Tax switch, some of which appears in the update as a \$750 million revenue item for 2009-10.

BC governments have a solid record when it comes to picking the right solutions over the convenient ones. From investments in public transit to the implementation of a carbon tax, BC governments of the recent past have been at the forefront of innovative public policy. It is the hope of many that the current fiscal difficulties faced by the provincial government will not represent an obstacle to good policy in the medium and long term.

10. CONCLUSION

The Olympic and Paralympic Games are a big party, and just like with any other party, the end will come too soon and be followed by a period that feels like a bit of a letdown. Once the flame is extinguished, the inevitable after-party cleanup completed and the furniture put back where it belongs, many British Columbians will ask “now what?”

There is more of 2009 behind us than there is remaining ahead and, at this point, BC’s economic landscape is a combination of positives and negatives. The main positive factor is the number of large construction projects; the negatives include lower exports and employment. No one can blame the province’s population for being a bit skeptical about their short-term economic prospects.

Maybe BC should look at its past for a better idea of what the post-Olympic future has in store. Two decades ago, Expo 86 was a success not only because it increased the province’s profile, but also because it left behind a legacy of infrastructure and urban renewal which still plays a vital role in the Vancouver of today. The Winter Games don’t last as long as a world fair, but the capital investment they require will remain in place long after they are over. In September, a Vancouverite was shocked to discover that new Olympic venues that were previously visible on Google Maps had suddenly disappeared from the website! This technical glitch won’t happen in reality.

Another less tangible asset attached to the Games is their impact on the vision all British Columbians (and not only Lower Mainland ones) have of their province. Often when we have visitors in our homes we tend to notice all the details that are wrong (finger marks on the walls, pet hair on the floor) and we find it hard to believe that our guests only see the positive: tasteful pictures and comfortable furniture. Maybe this is what will happen to BC next year: the province’s residents will pay heed to outsiders’ enthusiastic comments about the great potential BC has, and with a bit of luck, they will forget about the forest industry’s difficulties and come out of this with the reinforced conviction that the province they call home is the best place for innovating, for reaching out to new markets and for enjoying a unique and spectacular natural environment.

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About Canada West Foundation

Our Vision

A dynamic and prosperous West in a strong Canada.

Our Mission

A leading source of strategic insight, conducting and communicating non-partisan economic and public policy research of importance to the four western provinces and all Canadians.

Canada West Foundation is a registered Canadian charitable organization incorporated under federal charter (#11882 8698 RR 0001).

In 1970, the One Prairie Province Conference was held in Lethbridge, Alberta. Sponsored by the University of Lethbridge and the Lethbridge Herald, the conference received considerable attention from concerned citizens and community leaders. The consensus at the time was that research on the West (including BC and the Canadian North) should be expanded by a new organization. To fill this need, Canada West Foundation was created under letters patent on December 31, 1970. Since that time, Canada West Foundation has established itself as one of Canada's premier research institutes. Non-partisan, accessible research and active citizen engagement are hallmarks of the Foundation's past, present and future endeavours. These efforts are rooted in the belief that a strong West makes for a strong Canada.

More information can be found at www.cwf.ca.

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