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Passport to Growth

How international arrivals stimulate Canadian exports

Deloitte's Future of Canada series

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Global tourism is one of the world's fastest growing industries. In 2012, global international tourist arrivals passed the one-billion mark, having risen 4% per year for the last decade. Over the past 12 years, global tourism receipts have more than doubled, from $475 million U.S. in 2000 to $1.075 trillion U.S. in 2012. International departures from key emerging economies are increasing an average of 13% per year – far above the overall global average increase of 4%. **Yet Canada's tourism industry is struggling to compete.**

Executive summary

In 1970, Canada was the world's second most popular destination. In 1990, we were tenth, and by 2011 we were eighteenth, trailing such countries as Ukraine and Saudi Arabia. Since 2000, the number of international travellers to Canada has dropped 20%.

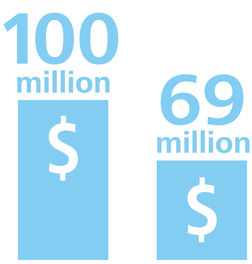
Despite this trend, tourism is still a sizeable part of Canada's economy. The sector employs 600,000 Canadians and represents 2% of national GDP, generating $22.7 billion in tax revenue. This paper presents new research showing that a turnaround of the tourism sector could have a significant impact on Canadian exports.

Canada's tourism industry

2%
of Canada's 2012 GDP

$22.7
billion in government tax revenue

Consider:



According to Statistics Canada data, a $100 million increase in tourism direct spending would generate a $69 million in indirect spending.

1%

increase in Canadian arrivals

$817

million in Canadian exports

An analysis of Statistics Canada data suggests that each 1% increase in Canadian arrivals would generate an $817 million increase in Canadian exports.

Tourism provides significant indirect benefits to the Canadian economy. According to Statistics Canada data, a $100-million increase in direct spending on tourism would generate $69 million in indirect spending – more than the same increase in direct spending would generate in the auto manufacturing sector ($51 million), mining ($50 million), or oil and gas extraction ($41 million).

Travel fosters trade. New Deloitte research analyzes Canadian data using established empirical techniques to show that a rise in business or leisure travel between countries can be linked to subsequent increases in export volumes to the visitors' countries – as well as an increase in the variety of goods exported.

Trade can support productivity growth. Our previous studies in Canadian productivity have shown that firms that expose their business to the competitive intensity of the global market are more likely to foster higher growth, more innovation and better long-term prospects than those that restrict themselves to domestic markets.

Strengthening Canadian tourism would have a large impact on Canada's overall economy. An analysis of Statistics Canada data suggests that each 1% increase in Canadian arrivals would generate an $817 million increase in Canadian exports. Had Canada's 2011 international arrivals grown at the U.S. rate, we project that Canadian export volumes would rise by $4.1 billion – nearly as much as Canada exports to Brazil and Russia combined.

Tourism, trade and Canadian competitiveness

Globalization has opened up incredible opportunities for Canada to capitalize on its strengths – an educated, skilled, talented workforce and a wealth of natural resources – and punch above its weight in global markets. But Canadian companies aren't seizing those opportunities.

Instead, many Canadian companies choose to do business in the same markets they've operated in for years. Statistics Canada data suggests that only 3% of firms based in Canada do business with international customers. Survey data from Deloitte's 2013 report, *The future of productivity: A wake-up call for Canadian companies*, suggests that, on average, Canadian firms with more than 10 employees derive only 14% of their revenue from exports.[1] And 56% of Canadian companies limit themselves to local or regional markets.[2]

Working with familiar clients and markets is a comfortable option and, in the short term, it may reduce risk. However, our studies on Canadian productivity have shown that firms that expose their businesses to the competitive intensity of a global market are more likely to enjoy higher productivity, more innovation and better prospects than those restricting themselves to domestic markets.

Over the long term, playing it safe can cause companies to lose their edge. If investment flatlines or falls, productivity stagnates and companies gradually become less and less competitive. Eventually, these companies are left behind as others – with their competitive instincts sharpened in international markets – outperform them.

Tourism is inherently international

Businesses in Canada's tourism industry can't opt out of international competition. Each day, these companies serve a demanding international customer base and face stiff foreign challenges from both established players and upstart newcomers.

Can a better understanding of Canada's tourism sector help us uncover ways to encourage more Canadian companies to improve their productivity and competitiveness by doing battle in global markets? Our research suggests there are some strong links between inbound Canadian tourism and Canadian exports – and that strengthening tourism could have a positive impact on Canadian companies and Canada's economy overall.

In turn, this could encourage Canadian companies to open themselves up to new markets and new opportunities in international markets – which can also have a major positive impact on Canada's economy.

Tourism: At the vanguard of the global economy

With the number of international travellers poised to continue rising significantly in the years to come, Canada has a tremendous opportunity to seize a sizeable share of the market. But there are challenges, too. Today's travellers are truly global. Tourism organizations and destinations must adapt and respond to customer expectations to fight and win in this competitive arena.

Unfortunately, Canada's tourism industry is already struggling to compete. While Canada remains a recognized and respected "brand" in international country rankings, we have been less successful at using our brand to attract travellers. In 1970, only Italy was more popular than Canada as an international destination. By 1990, we had fallen to tenth place and by 2011 we were eighteenth, trailing such countries as Ukraine and Saudi Arabia. Since 2000, we have lost 20% of our visits from abroad.[3]

Globally, it's a much different story. Tourism is among the world's largest and fastest growing industries. Only fuels, chemicals and foods surpass tourism in terms of international export volume.[4*] In fact, tourism is at the leading edge of the unprecedented changes that are reshaping global trade and fueling the rise in international travel.

Table 1

Global growth of international travelers
TOURIST ARRIVALS PER 100 POPULATION

1980 – 2020
CAGR: 2.8%

6%	11%	18%
1980	2000	2020 (projected)

* Tourism isn't commonly considered an export industry. However, purchases of goods and services by foreign visitors to Canada are counted as exports and account for 2.9% of the country's total exports.

Over the past 30 years, the world has seen a dramatic increase in the number of people travelling outside their home country.

- In 1980, only 6% of the global population travelled internationally. By 2000, the rate had risen to 11%; by 2020, nearly one in five people on the planet (18%) will travel abroad (Table 1).[5]
- Global international tourist arrivals passed the one billion mark for the first time in 2012, having risen 4% on average for the past 10 years.[6]
- Global tourism receipts have more than doubled in the past 12 years, from $475 billion U.S. in 2000 to $1.075 *trillion* U.S. in 2012 (Table 2).[7]

Table 2

Increase in tourist spending
GLOBAL TOURISM RECEIPTS (IN $US BILLIONS)

2000 – 2012
CAGR: 7%

Global tourism's rapid growth can be directly linked to the same three trends that continue to shape the global economy: emerging-market growth, international migration and demographic change.

The growth of emerging markets

Rapid economic growth in emerging markets is creating a new and fast-growing middle class with the resources to travel. And travel they do. International departures from key emerging economies are rising an average of 13% per year, far above the 4% annual rise in overall global international departures (Table 3).[8]

Rising international migration

More and more people are migrating to find work and create new lives for themselves. This is driving more international travel as migrants and their friends and families periodically make trips to visit one another. In 2011, 30% of foreign travellers to Canada said "visiting friends and family" was the main purpose of their trip.[9] With approximately 41 million more people anticipated to be living and working in foreign countries by 2030,[10] this trend will only continue.

Shifting demographics

Other demographic factors are also driving the increase in global travel as more young people and retirees travel abroad.

Driven by a sense of adventure and a desire to see the world, growing numbers of young people are exploring foreign lands before settling down to further education, family or career. Between 2000 and 2010, youth (aged 15 to 30) accounted for 20% of all travellers. Travel by this cohort is projected to grow 6.3% per year, reaching 300 million in 2020 (Table 4).[11]

With more leisure time and fewer family responsibilities, the world's rapidly growing retiree population is equally keen to travel. As the baby-boomer cohort ages, the percentage of the world's population aged 60 or older is projected to rise to 13% by 2020 from its current level of 11%.[12] This group is expected to travel abroad more often. This is particularly notable given that retirees are among the highest-spending international travellers.

Table 3

Global growth of travellers from emerging economies

INTERNATIONAL TOURISM DEPARTURES CAGR FROM 1998 – 2010

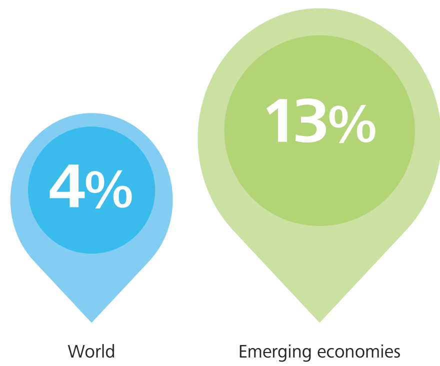
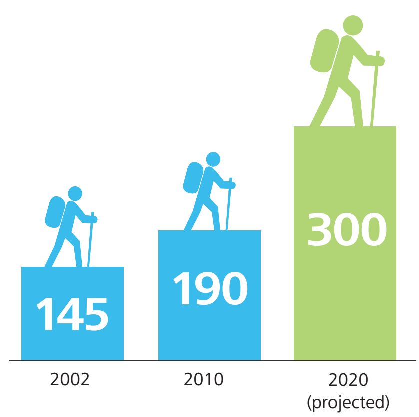


Table 4

Growth of youth travellers

GLOBAL YOUTH TRIPS PER YEAR (IN MILLIONS)

2002 – 2020
CAGR: 6.3%



Tourism: An overlooked asset

Canada's tourism sector plays a significant – if unheralded – role in our economy. In 2012, tourism generated $15.4 billion in revenue from international visitors alone and accounted for approximately 2% of Canada's GDP. The sector directly employs over 600,000 Canadians and, in 2012, generated $22.7 billion in tax revenue.[13]

Not surprisingly, Canada's tourism sector has a sizeable indirect impact on the rest of our economy. In fact, these indirect impacts are as great as, and maybe even greater than, the automotive manufacturing, mining, and oil and gas extraction industries (Table 5).

According to Statistics Canada's input-output multiplier calculations for 2009*, a $100-million rise in direct spending in the tourism industry generates $18 million to $28 million more in indirect spending than the auto manufacturing, mining, or oil and gas extraction sectors.[14]

Tourism also creates jobs: that same $100-million rise in direct tourism spending creates nearly 1,400 full-time-equivalent jobs. While these jobs are often seasonal or part-time and pay less than those in some other sectors, they create economic benefits for a broad group of stakeholders.[15 16 17]

If tourism's economic impact can be overlooked, it's because tourism's position as one of Canada's major industries is less obvious than that of other sectors. You can *see* an auto plant, a refinery or a mine, and it's equally easy to see how a plant or mine closure can devastate a local economy. In contrast, there are no "tourism factories" employing thousands. Tourism is geographically diffuse, taking place across the country each day – from a kayak tour along the B.C. coast to the bustle of the international arrivals area at Pearson Airport to a stroll through the shops of Old Montreal.

* Input-output multipliers for the tourism and mining industries were calculated using an average of all tourism sub-industries weighted by their contribution to total tourism GDP for 2009.

Table 5

Indirect benefits of key industries

A $100 million increase in direct spending for the following industries generates

	Indirect output	New job creation*
Tourism	$69 million	1,373 new jobs
Auto manufacturing	$51 million	353 new jobs
Mining	$50 million	438 new jobs
Oil and gas extraction	$41 million	326 new jobs

* Calculated in person years of employment

Source: Statistics Canada (2013). Input-Output National Multipliers. Industry Accounts Division / Statistics Canada.

Can tourism boost Canadian exports?

Tourism's direct and indirect impact on economic output and employment is clear and substantial. However, there are increasing signs that tourism can also play a significant role on facilitating export growth – by furthering business relationships and stimulating foreign demand for domestically produced goods.

Business travel leads to more business

There is new evidence that business travel contributes to increasing the volume and variety of exported goods and services. Business travellers develop connections that in turn open up pathways into new markets and create a foundation for trade relationships. Travel enables the face-to-face meetings that can be so essential to overcoming linguistic or cultural barriers and building the trust necessary for parties to enter into a trade agreement.

A study of Arizona agribusiness firms found that companies were up to 51% more likely to trade with their counterparts in Mexico if their personnel had made a business visit there.[18] Another recent paper, by U.S. researcher Jennifer Poole, suggests that travel plays a strong role in stimulating trade between countries that speak different languages.[19]

New Deloitte analysis suggests that, had Canada's international arrivals grown at the same rate as the U.S. in 2011, Canadian export volumes would have risen $4.1 billion – or almost as much as we export to Brazil and Russia combined.

Travel increases foreign demand for goods

Some studies also suggest that travel – for leisure or business – can help expand the volume and variety of goods traded with other countries. Travel increases visitors' awareness of a country's products and, subsequently, their demand for those products once they return home.

German researchers exploring the connection between tourism and wine exports in Germany and Spain found that inbound visits from Germany were responsible for approximately 0.5% of all Spanish wine exports over the period of the study.[20] In addition, Poole's study used a "trade-weighted gravity model" to analyze tourism's impact on trade patterns between the United States and its trading partners. She found that an increase in the number of inbound business travellers from a country to the U.S. significantly correlated with higher export volumes to that country – as well as an expansion of the variety of goods and services exported.[21]

The Poole study

A trade-weighted gravity model

In physics, the gravitational movement of bodies is governed by their mass and the distance between them, with larger and closer objects being more strongly drawn together. In a trade-weighted gravity model, the level of trade between two countries is assumed to be governed by their "mass" (i.e. GDP), while the distance between them is defined as the distance between their two largest cities.

If Canada were to regain its former popularity as a destination for leisure and business travellers, the positive impact on our economy could be material.

The Keum study

A Granger causality test

The Granger causality test has been used by economists since the 1960s to determine whether past values of a particular time series contain information that is useful in predicting later values in another time series. If they do, it can be said that a "Granger-causal" link is discovered, and that the first time series – i.e., travel – led to the resulting increase or decrease in the second time series – i.e., exports.

South Korean researcher Kiyong Keum employed Granger causality analysis to evaluate the direction of causation between international visits to, and exports from, South Korea and 21 trading partners. He discovered a granger-causal link from tourism flows to trade flows – in other words, more tourism led to more trade – indicating that fostering international travel can be an effective means of increasing exports.[22]

Tourism's impact on Canadian trade

Unfortunately, little similar analysis has been conducted on the relationship between travel and trade in the Canadian market. To close this gap, Deloitte undertook its own research using Poole's trade-weighted gravity model, Keum's Granger causality analysis and Canadian data on exports and international arrivals.

Deloitte analysis shows statistically significant evidence that changes in international arrivals drive change in exports to the visitors' country of origin in the following year. We also found that the impact of this relationship was quite sizable. Our model suggests that an increase of just 1% in international arrivals to Canada from each country of origin would result in total Canadian exports rising by $817 million over the following two years. The model suggests that this increased travel would also increase the range of goods exported to our trading partners by 0.27% for each 1% increase in international arrivals.*

If Canada were to regain its former popularity as a travel destination and attract more and more leisure and business travellers – reversing the 20% drop we've experienced since 2000[23] – the positive impact on our economy could be material.

A linear extrapolation of our research suggests that, had Canadian 2011 international arrivals grown at the U.S. rate, Canadian export volumes would have risen $4.1 billion. To put that figure into context, that's almost 1% of total Canadian exports in 2011 – and nearly as much as our 2011 exports to Brazil and Russia combined ($4.3 billion).[24]

It's very clear that Canada's tourism industry has the potential to support an expansion in Canadian trade volumes. And with emerging markets driving much of the growth in international travel in the years to come, Canada's tourism sector can also help us grow and diversify our trade partners.

* These are the technical conclusions and insights from the econometric modelling process. All results are statistically significant at the 5% level of significance. Variables removed from the analysis due to their insignificant contribution or their absolutely counter-intuitive behaviour are deemed not to have an impact on export/import value or variety given the current data. Other technical modeling protocols were followed, such as checking for data issues. For a detailed explanation of the methodology, please visit the Deloitte Tourism report website.

Opening a new route to Canadian competitiveness

Canada needs a strong, internationally competitive tourism sector. Tourism provides important direct and indirect benefits to the Canadian economy. And as Deloitte's research shows, a strong, competitive tourism sector can play an important role in opening up new markets for Canadian companies.

This, in turn, can encourage some Canadian companies to step outside safe, familiar comfort zones and compete for their place on the world stage. As our research into Canadian productivity has shown, doing business internationally is one of the most powerful ways to improve Canadian competitiveness. Competitive intensity can drive growth, innovation and productivity.

But there is work to be done to build a stronger, better Canadian tourism sector. Canada's tourism sector and governments must respond in order to increase international arrivals and reverse our loss of tourism market share.

Numerous organizations have put forth sound policy and business recommendations in recent years, including the Conference Board of Canada, Canadian Tourism Human Resource Council, The Tourism Industry Association of Canada, the Canadian Tourism Commission, Industry Canada and the Standing Senate Committee on Transport and Communications. Based on our analysis, we have summarized the recommendations that we believe are most relevant.

Recommendations

Tourism organizations:

Innovate

Tourism organizations must respond to the trends transforming the industry. According to Canada's Federal Tourism Strategy: *Welcoming the World*, organizations should diversify their offerings and create new products that appeal to new demographics and meet the needs of travellers from a range of cultural and geographic backgrounds.[25]

Invest in the business

Canada's Federal Tourism Strategy: *Welcoming the World* also advises tourism companies to invest in their businesses – upgrading their tools and technology to improve efficiency, productivity and competitiveness.[26]

Develop and retain top talent

An aging population may mean a rising number of travellers, but it also means a looming labour shortage for Canadian businesses. The Canadian Tourism Human Resource Council recommends that tourism companies proactively ensure they can offer career growth and development opportunities that attract and retain talent.[27]

Governments:

Introduce structural reforms to the air travel sector

Governments can help ensure Canada is an affordable, hassle-free destination for international travellers, according to a 2012 report by the Conference Board of Canada. The report recommends structural reforms in the air travel sector, where high base fares, fees and taxes conspire to make Canada a less desirable destination.[28] The Standing Senate Committee on Transport and Communications has recommended phasing out airport ground rents over the short term, and transferring airport ownership to airport authorities over the long term. These changes would help lower fares paid by travellers to Canadian airports – and create incentives for new airport development projects.

Reform the visa issuance process

As the Conference Board of Canada has pointed out, the federal government should also take steps to meaningfully reform visa issuance, where long wait times and labour disputes are making Canada inaccessible for many travellers. Updating technology to reduce wait times and backlogs is one option – the U.S. recently introduced proprietary software designed to reduce its own visa processing time. Initiatives like the Five Country Conference (FCC), a visa-processing collaboration between Canada, Australia, New Zealand, the U.S. and UK, also represent a step in the right direction. We encourage the government to pay close attention to this initiative in the hope that it will serve as a template for similar programs in the future.

Investing in Canadian tourism is not just about making the tourism sector stronger. It's about making the entire Canadian economy bigger, stronger and more productive and competitive. By attracting greater numbers of travellers to Canada, we can expand the breadth and amount of Canadian exports. In doing so, we encourage increasing numbers of Canadian companies to set foot in the global marketplace where they can hone their competitive edge against the best the world can offer. At the same time, a stronger Canadian tourism sector means job growth and greater economic output across the country, growth that isn't dependent on geography or geology.

The destination is clear.

We simply need the will to write our own ticket.

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Methodology

For a detailed explanation of the methodology we employed for our empirical analysis, please visit the Deloitte tourism website.

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