

# 2014 GATEWAY TO GROWTH VISITOR VISA PROGRESS REPORT



TOURISM INDUSTRY ASSOCIATION OF CANADA  
ASSOCIATION DE L'INDUSTRIE TOURISTIQUE DU CANADA



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# EXECUTIVE SUMMARY

Attracting international visitors from countries with the greatest growth potential requires an easy and modern visa system. Studies show that facilitation and removal of visa requirements have significant impacts on tourism and trade in general. For example, in Canada just taking steps to facilitate visas such as improved information, digitalization, and regional agreements<sup>1</sup> would mean between \$98M and \$885.7M in incremental spending next year alone.<sup>2</sup>

While ensuring the safety of its citizens, the Canadian government recognizes that cumbersome travel documentation requirements act as a trade barrier and has taken a number of steps to modernize Canada's visa system. The facilitation of online applications, investment in new Visa Application Centres (VACs), the CAN+ program and the electronic travel authorization (eTA) are all creating momentum with which to move forward.

There is still work to be done: Canada ranked 106/140 in terms of number of countries that require visas upon entry<sup>3</sup> and is still reputed to have some of the world's strictest requirements.<sup>4</sup> TIAC understands the need for screening of security threats, however this must be balanced to ensure legitimate visitors are allowed to travel and do business in Canada. TIAC encourages the government to continue to facilitate international visitation while keeping Canadians safe including:

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## Short Term

- Ensure new eTA rules help, not hinder visitor documentation process
  - Consider a Fall 2015 roll out of the eTA program to ensure operators have ample time to educate their clients about the changes
  - Reinvest processing fees for more VACs and processing capabilities
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## Medium Term

- Waive Visa Requirements for Brazil and Mexico
  - Allow for visa and eTA continuance onto new passports
  - Continue with and expand on fast track programs like CAN+
  - Regional reciprocal visa agreement with the US for visas and ESTA/eTA
  - Expand current visa facilitation proposal for Pan American Games' athletes and families to all legitimate travellers from the Americas
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## Long Term

- Continue to strive for clarity in the application process
  - Expand Transit Without Visa using Interactive Advance Passenger Information (IAPI) system
-

Modernizing the visa process is one part of TIAC’s plan to increase international visitation by addressing the following barriers:

**FIGURE 1**  
**INTERNATIONAL MARKETING, ACCESS AND PEOPLE & PRODUCT**



# SECTION 1

## PROGRESS REPORT FOR CANADA

### MOVING TO A MODERN VISA PROCESS

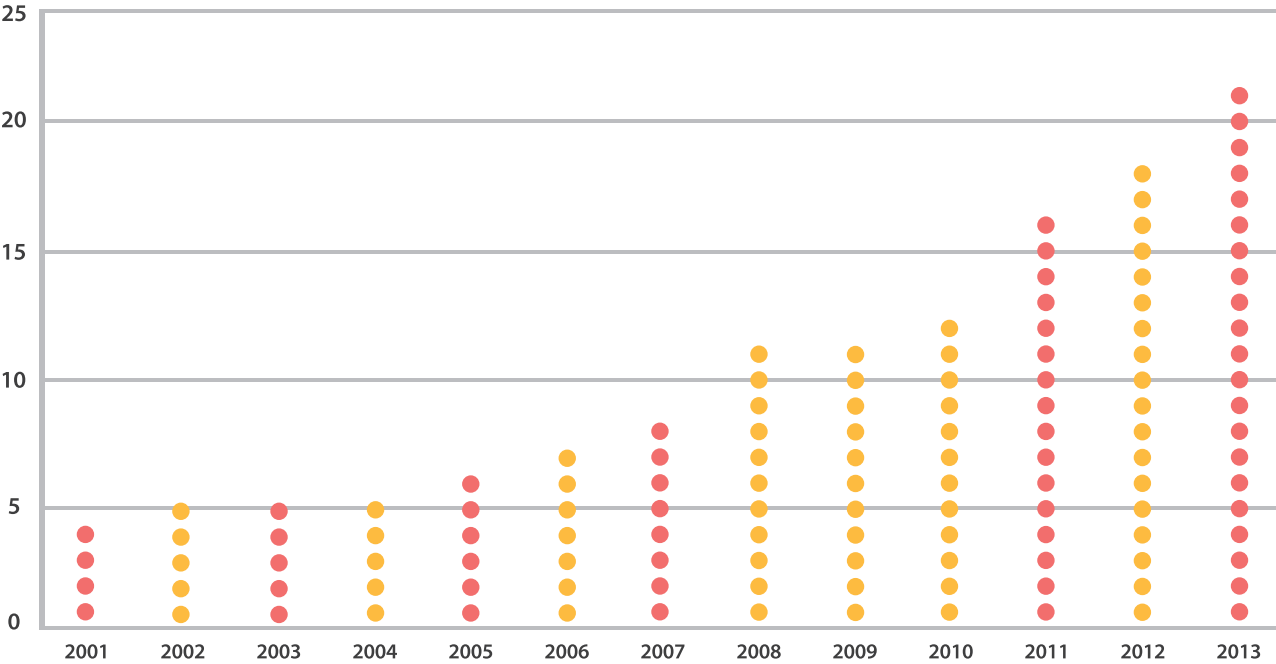
In consultation with TIAC, Citizenship and Immigration Canada (CIC) has taken some important steps in easing travel document requirements.

POLICY	BENEFIT
CAN+ Program for Mexico and India	Applicants who have previously visited Canada without incident or who have been approved for a US visa will be fast-tracked.
10 Year Multi Entry Visas (subject to validity of passport)	All visas to Canada are now valid for 10 years and multiple entries which encourages repeat visitors.
Proposed 2015 Pan American Games Facilitated Application and Entry Process	The government is proposing regulations that would facilitate the visa application for the family members of athletes. This is a good opportunity to explore easing visa restrictions for many countries in the Americas. <sup>5</sup>
Expansion of Visa Application Centre (VAC) network to around 130 locations <sup>6</sup>	The \$42 million investment announced in the 2013 budget for CIC operations over 2 years has greatly expanded access for applicants.
Commitment to implement Electronic Travel Authorization (eTA) for business and leisure visitors arriving by plane	The eTA will give Canadian security officials advanced information on foreign visitors. Having this additional information opens the door for removing traditional visas for low risk countries like Brazil and Mexico.
Launch of online applications	Since December 2012, applicants have been able fill out their application form online. By only mailing their passport in to be stamped at a later point in the process, the time that the applicant is without his or her passport is reduced.
Reasonable admissibility policy	Americans with minor convictions in their distant past can now enter Canada by obtaining a visa issued at the point of entry.

# VISITOR VISA PROCESSING STATISTICS

While these steps are certainly a move in the right direction, the process remains burdensome. Despite large investments in Visitor Application Centres (VACs), a shift to online applications and other fast-track programs, average wait times for visas continue to grow.

**FIGURE 2**  
**PROCESSING TIMES ARE INCREASING**  
**VISITOR VISA PROCESSING TIMES FOR ALL POSTS**



Processing time should read as: 80% of cases were completed within x days or less  
 Source: Citizenship and Immigration Canada

# THE PROFESSIONAL ASSOCIATION OF FOREIGN SERVICE OFFICERS (PAFSO) STRIKE

In June 2013 the Professional Association of Foreign Service Officers began picketing and staging rotating walkouts at home and abroad over their collective bargain agreement. The target of their job action was the processing of international visas which affected the 15 largest Canadian missions including Beijing, New Delhi and Mexico City.<sup>7</sup>

This job action in the middle of tourism’s high season certainly had an effect: processing times during the summer (June, July and August) were up an average of 5 days in 2013 from the year prior.<sup>8</sup>

**FIGURE 3**  
**PAFSO STRIKE HAD A MAJOR IMPACT ON PROCESSING TIMES IN 2013**  
**TEMPORARY RESIDENT VISA OVERSEAS PROCESSING TIMES\* (IN DAYS)**

See Appendix 1 for complete table

		Mexico City	Sao Paulo	Chandigarh	New Delhi	Beijing	Shanghai	Hong Kong	All Posts
2012	Summer	10	10	10	3	10	14	6	21
	Year	11	14	12	3	11	12	6	18
2013	Summer	32	25	27	20	20	12	9	26
	Year	24	22	32	14	16	15	8	21

\*Processing time should read as: 80% of cases were completed within x days or less  
Source: Citizenship and Immigration Canada

**BIGGEST CITIES IN KEY MARKETS IN EMERGING ECONOMIES WERE HEAVILY AFFECTED BY THE STRIKE.**

**OVERALL, SUMMER WAIT TIMES WERE UP 5 DAYS IN 2013.**

# APPROVAL RATES

On a positive note, approval rates have held steady despite a large increase in the volume of cases being processed. We can infer that this is because more applications are being filled out correctly most likely due to the steps that CIC has taken to increase efficiency in the application process.

**FIGURE 4**  
**MORE APPLICATIONS ARE BEING PROCESSED WITH APPROVAL RATES HOLDING STEADY**  
**TEMPORARY RESIDENT VISA APPLICATIONS RECEIVED AND PROCESSED OVERSEAS**  
**FROM 2001-2013 (PERSONS)**



Source: Citizenship and Immigration Canada

# HOUSE OF COMMONS STANDING COMMITTEE ON CITIZENSHIP AND IMMIGRATION REPORT

In March 2014, the House of Commons Standing Committee on Citizenship and Immigration released a report on the Temporary Resident (Visitor) Visa system in Canada. The committee heard from a number of experts and stakeholders in the security, travel and tourism sectors including TIAC. Many witnesses maintained that while the safety of Canada and Canadians was paramount, the current visitor documentation was too blunt an instrument and was hindering legitimate travel by business

people, students and tourists.<sup>9</sup> TIAC was heartened by the committee’s recommendations to modernize the visitor documentation system.

This fall the Government tabled an encouraging response that indicated they understand how traveller documentation requirements impact tourism and trade in general: **“The Government understands that [...] to ensure that Canada remains a destination of choice, the visa system must be more user-friendly, timely and efficient. It is not a choice, in today’s global market, it is a competitive imperative.”**<sup>10</sup> The Government committed to progress or continued progress in the following key areas.

	COMMITTEE RECOMMENDATIONS <sup>11</sup>	GOVERNMENT RESPONSES AND COMMITMENTS <sup>12</sup>
e-Applications	That the Government of Canada further develop its e-application system to prevent delivery delays for applications. That the Government of Canada make the visa application system more user friendly [...]	<p><b>Agree Fully</b></p> <ul style="list-style-type: none"> <li>Objective is to see the vast majority of visitor visas submitted and processed online at the earliest possible date</li> <li>Seek to have e-applications available on all platforms, including smartphones and tablets</li> </ul>
Express Service	That the Government of Canada explore the feasibility of an alternative fee structure for an express visa service that is timely and achieves business commerce needs	<p><b>Agree Fully</b></p> <ul style="list-style-type: none"> <li>CIC will explore the feasibility of an alternative fee structure that would be based on specific eligibility criteria in order to allow more flexibility vis-à-vis processing times and service standards</li> </ul>
Passport Submission	That the Government of Canada make publicly aware to applicants that, in many circumstances, they can retain their passports during the application process and that when passports are collected by the government, they are returned as promptly as possible	<p><b>Agree Fully</b></p> <ul style="list-style-type: none"> <li>CIC will update its web site and visitor visa instruction guide and include this information within the e-application</li> <li>Include this messaging when promoting CIC’s facilitative measures, for example, in departmental news releases, media responses, fact sheets, and through social media channels</li> </ul>

Clear Application	<p>That the Government of Canada review the visa application guide in order to give applicants a better understanding of the information required to fill in a complete visa application</p>	<p><b>Agree Fully</b></p> <ul style="list-style-type: none"> <li>• CIC has developed new client service goals to help guide the delivery of services such as ease of use, timely service, up to date case information, clear decisions and opportunities to provide feedback</li> <li>• The Government will [...] work to further streamline the TRV application guides, including plain language editing, [...]. In the context of reviewing and improving online applications, the Government is already working to provide more client specific information in a client's refusal letter</li> </ul>
Safe List of Countries	<p>That the Government of Canada consider establishing a list of countries whose nationals may be eligible for expedited visitor and student visas</p>	<p><b>Agree in Principle</b></p> <ul style="list-style-type: none"> <li>• The Government does not maintain a specific "list of countries for expedited services" because it would be too costly and impractical to maintain. However, based on the success of its numerous visa facilitation programs, the Government will continue to work with its partners to provide service enhancements for key priority markets. To maximize its finite resources, CIC targets key markets where Canada derives the most benefit</li> </ul>
Streamline those with US Visas	<p>That the Government of Canada establish a program that streamlines applications from foreign nationals who have already been screened by the United States and examine the feasibility to include those screened by the European Union</p>	<p><b>Agree in Principle</b></p> <ul style="list-style-type: none"> <li>• As the Government continues to implement new technologies, processes and capabilities, including those stemming from the Canada-US. Beyond-the-Border Action Plan, it will explore more ways to facilitate legitimate travellers, including those screened by trusted partners</li> <li>• Ultimately, Canada must retain its sovereignty in making admissibility and eligibility decisions, particularly as it relates to screening applications for threats to Canada's national security</li> </ul>

## SECTION 2

# QUANTIFYING THE IMPACT OF VISA REGULATIONS

In 2002 Canada was the 7<sup>th</sup> most visited country in the world with 20 million international visitors. Today, international visitors have dropped by 4 million and Canada's rank has dropped to 17<sup>th</sup>. This weak performance is in stark contrast to the global tourism sector. The average annual growth in visitors around the world was 5% in 2013 – three times Canada's 1.5% increase.<sup>13</sup>

International visitors are effective economic drivers as they spend more and stay longer. In 2013, international visitors spent \$18.2 billion in Canada – making tourism the largest service export in the country. However Canada is slowly losing its grip on this excellent source of economic activity. Unfortunately Canada has become overly reliant on domestic travellers which reduces export value and increases risk for the sector by narrowing its customer base.

If Canada were to keep pace with the world average, it would mean growth at four times that of inflation and significant economic gains. **5% growth would mean:**



**\$4.1 billion**  
more in overall  
exports



**\$613 million**  
more in overall  
spending<sup>1</sup>



**2,700**  
more flights<sup>2</sup>



**4,538 more jobs**  
**2,269 for youth<sup>3</sup>**

1) Based on \$768 average spend per visitor 2) Based on 68% of visitors arrived by air, 200 seats/plane in 2013 3) Based on every \$135 365 in additional spending creating 1 new job

A modern visa system is key to increasing international visitors from countries with the greatest growth potential. While important progress has been made the difficulty, intrusiveness and expense of obtaining a Canadian visa is still deterring visitors and harming Canadian tourism businesses. A recent Nanos survey of tourism businesses found that on average businesses rated visa requirements as their third most pressing policy issue.<sup>14</sup>

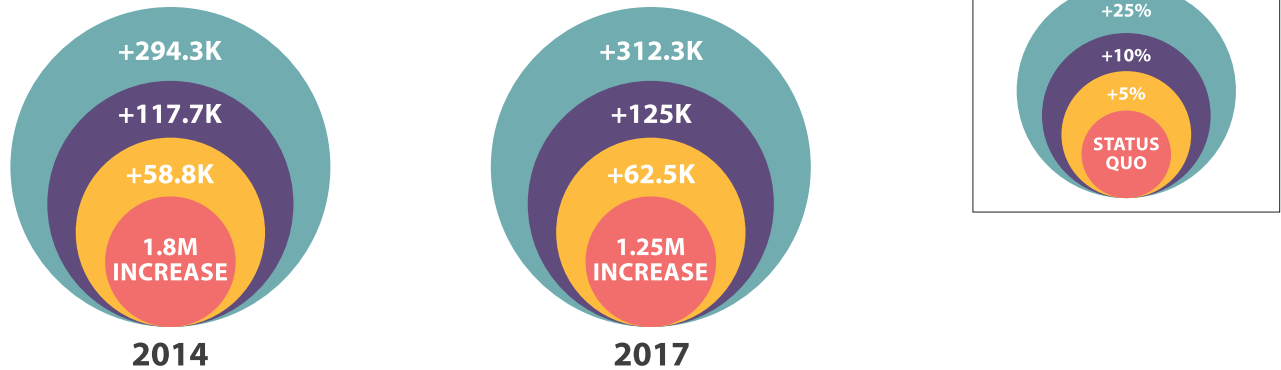
**A 2010 report found that visa requirements can reduce visitation by as much as 31%. In a real world example, the outright waiver of visas for Brazilians and Mexicans, both low risk countries, to enter Canada would mean up to an additional \$186 million in spending per year.<sup>15</sup>**

Another report that looked at a number of G20 case studies found that mere facilitation can boost visitation by 5%-25%.<sup>16</sup> For example, in Canada the facilitation of visas would mean between \$95M and \$885.7M more in spending next year alone.<sup>17</sup>

Many steps the government can take to facilitate visa processing cost little or nothing. For example the new Electronic Travel Authorization (eTA) is expected to be cost neutral<sup>18</sup> while rewording the application for clarity is free.

Figures 5, 6 and 7 show the impact of the above scenarios for Canada.

**FIGURE 5**  
**VISITOR GROWTH POTENTIAL FROM VISA FACILITATION<sup>19</sup>**



**FIGURE 6**  
**VISITOR SPENDING GROWTH POTENTIAL FROM VISA FACILITATION (\$B)<sup>20</sup>**



**FIGURE 7**  
**JOBS GROWTH POTENTIAL FROM VISA FACILITATION<sup>21</sup>**



# BROADER ECONOMIC IMPLICATIONS: TRADE AND INVESTMENT

While the increase in visitor visas for the key markets of Mexico, India, Brazil and China is certainly moving in the right direction, the 6% decline in business visas since 2010 highlights how Canada’s international trade and economy is vulnerable to difficulties with traveller documentation requirements.

Visas do not only block travellers (and their money) from entering the country, they also prevent the development of wider international trade. A Deloitte report states that every 1% increase in international visitation generates over \$800 million in incremental export activity.<sup>22</sup> Examining the phenomenon from another angle, a recent study quantifies export revenue lost specifically due to visa requirements.

**It estimates that countries with bilateral visa requirements reduce bilateral trade and Foreign Direct Investment (FDI) by up to 25% (with one way visa restrictions that drops to 19%).<sup>23</sup>**

**FIGURE 8**  
**HEALTHY GROWTH IN VISITOR VISAS, DECLINE**  
**IN BUSINESS VISAS SHOWS IMPACT ON TRADE**  
**BUSINESS AND VISITOR VISAS**  
**(MEXICO, INDIA, BRAZIL AND CHINA)**

	2010	2011	2012	2013	Increase / Decline %
<b>Business</b>	70591	76017	70485	66356	<b>-6%</b>
<b>Visitor</b>	253411	292519	339972	371147	<b>46%</b>

Source: Citizenship and Immigration Canada

# VISITING FRIENDS AND RELATIVES (VFR)

In 2012, almost 30% of visitors to Canada came to visit friends and relatives (VFR). China and India have the highest proportion of travellers who come to visit friends and relatives with 35% and 49% respectively.<sup>24</sup>

People who visit friends and family – especially those from overseas – are significant contributors to the tourism economy.

An Ontario study shows that overseas VFR visitors spend almost twice as long in the region than domestic or US visitors, with 40% opting to stay in paid accommodations one or more nights during their trip. Overseas VFR visitors are significantly more likely to research, plan and incorporate traditional tourist activities such as eating out, sightseeing, shopping and visiting entertainment venues.<sup>25</sup>

As of the 2011 census there were almost 1.3 million people living in Canada who were born in Brazil, Mexico, China and India whose family and friends need visas to visit.<sup>26</sup>

### CASE STUDY: SPOTLIGHT ON MEXICO

In 2009, Canada re-imposed a visa on Mexicans in response to concerns about bogus refugee claimants from the country. Since then the Government has introduced the *Protecting Canada's Immigration System Act* which has helped alleviate this problem significantly by clearing bogus refugee claims from designated countries more quickly.

**FIGURE 9**  
**FORGONE ECONOMIC ACTIVITY AS A RESULT OF VISA REQUIREMENTS FOR MEXICANS<sup>27</sup>**



### CASE STUDY: SPOTLIGHT ON SOUTH AMERICA: BRAZIL AND CHILE

While visa requirements are useful in helping governments control access to their borders, they are often heavy handed and in many cases out of date. The change in the geo-political and financial status of many countries means that visa restrictions that were originally imposed to curtail refugee claimants and security threats are no longer needed.

With strong economic growth over the past decade and stabilized political landscapes, Chile and Brazil are examples of countries that have outgrown the need for extensive travel documentation. In fact these countries produce significant numbers of high yield visitors. Considering the US has already waived visa requirements for Chile and is in talks to do the same with Brazil, Canada must consider the competitiveness implications of continuing to require visas from these countries.

## CHILE

Since 2007, Chileans have increased their spending in the US by 60% with \$710 million spent in 2012 alone<sup>28</sup> and refusal rates have dropped from 6.7% in 2007 to a mere 1.6% in 2013.<sup>29</sup> In February 2014, the US Department of Homeland Security announced that it had accepted Chile into its visa waiver program. As the new rules only went into effect on May 1st, 2014 we do not yet have the data to measure growth after the visa waiver. However, we can estimate that visitors will increase by over 80 thousand incremental visitors<sup>30</sup> and US exports to Chile will be boosted by over \$5 billion.<sup>31</sup>

**With Canada exporting more than \$800 million a year to Chile, we stand to gain almost \$200 million more in trade if we follow the US lead on waiving visa requirements for Chilean visitors.<sup>32</sup>**

## BRAZIL

In the US, Brazilians are big spenders. For example in 2012, 800 000 Brazilians visited New York City alone, the highest number of foreign visitors after Canada and the UK. More importantly they are high yield. At \$2.4 billion, they ranked first for spending in New York City that year.<sup>33</sup>

Canada is trailing behind the US in attracting Brazilian travellers. In 2012 Canada only captured 5% of the number of Brazilians that the US did. Visitation growth is also stronger in the US than Canada (15% growth in the US versus 1% increase in Canada in 2013).<sup>34</sup>

The competition for Brazilian visitors is about to get worse. The US is well underway in talks with Brazil to include them into their visa waiver program. In 2012, then US Secretary of Homeland Security announced a statement of intent to establish a working group with Brazil to examine the possibility of waiving visas for Brazilian visitors.<sup>35</sup> A year later during his visit to Brazil, US Secretary of State John Kerry said, "I'm confident we'll get to the day when we have an open visa program."<sup>36</sup>

**If Canada were to waive visa requirements it would help our competitiveness as well as bringing in an additional \$70 million a year in tourism spending and boosting trade by over \$800 million.<sup>37</sup>**

## SECTION 3

# CANADA'S VISA PROCESS COMPARED GLOBALLY

### OVERVIEW OF CANADIAN VISA PROCESS

Canada has a reputation for being a particularly difficult country from which to obtain a visa. Unclear admission criteria, cumbersome and intrusive forms, unclear instructions and the requirement to surrender original documents all contribute to the barriers that Canada imposes on certain foreign visitors.

#### The application process:

Citizenship and Immigration Canada does process visa applications at its overseas offices but prefers applicants use a Visa Application Centre (VAC) or apply online if allowed. When printed, the application instructions total 40 pages and are available in French and English only. Applications are \$100 for single or multi-entry.

### What is the difference between a visa office and a visa application centre?

Visa Application Centres (VACs) are run by private companies authorized by the Canadian government to accept applications from people within a geographic area who want to come to Canada temporarily or permanently. At VACs, staff review applications for completeness, collect fees and provide a range of other services depending on the country in which they are operating.

Visa offices are Canadian government missions abroad. They receive visa applications either directly or from VACs. Immigration officers at these missions are the only people authorized to assess applications and decide whether to issue a visa or refuse an application.

Applicants must fill in a basic four page form which asks for in-depth personal information including some questions that are perhaps unnecessary for short-term visitors like:

- Education attained including in school names
- Previous three places of employment
- If applicant has taken a test from a designated testing agency to assess proficiency in English or French

After the application is complete applicants may be required to follow up with additional information including:

- Medical examination
- Police certificate
- In-person interview
- Additional bank, employment and family information

Residents of 30 countries are required to provide biometrics (fingerprints and photo) at a VAC which costs \$85. This must be completed before applying for a visa.

There is no appeal process for applicants who have been refused and the feedback that the government provides is vague and, in many cases, unhelpful.<sup>38</sup>

## HOW CANADA'S VISA PROCESS COMPARES GLOBALLY

FIGURE 10

### GLOBAL COMPARISON OF VISA PROCESSES

See Appendix 2 for complete table with footnotes

Country	Number of Visa required Countries	Number of eTA required Countries	Average Visa/eTA Processing Time	Approval/ Rejection Rates	Number of VACs	Online Application for Visa?	Length of Form	Submit Passport?	Visa/ETA transfer to new passport?
Canada	147	60 (Beginning in 2015)	21 days	83%	133	Yes, in some cases	4 pages	Yes	No
US	155	31	Visa: 21 days to get interview.  ESTA: Immediate, 1-3 days for Authorization Pending	78%	NA	Yes, but in-person interview is required	2 pages	Yes	ESTA: No Visa: Yes
UK	182+	Electronic visa waiver (EVW): Qatar, Oman and UAE are eligible	95% of family visitor applications within 15 days	80%	185+ VACs share consulate space in US and NZ	Visa: Yes	12 pages	Yes	Yes, carry both
Australia	124	eVisitor: 36 eTA: 8	Visa: April -June 2013 Tourist: 12 days Business Visitor: 15 days	97% in fiscal year 2012-2013	68	Yes	Tourist Visa: 16 pages	No	Yes, but must notify gov't of change
EU	116	NA	Must be processed in 10 days	94%	NA	No	Visa: 3 pages	Yes	No

## CANADA'S PROPOSED eTA POLICY

Canada is set to impose a requirement for all foreign nationals from visa exempt countries to obtain an Electronic Travel Authorization (eTA) before entering Canada by air. The US would be exempt from these eTA requirements. Starting in 2015, visa exempt visitors arriving by air will pay a \$7 fee to apply for the authorization. The application would be done online through a government website and would allow officials to conduct a pre-travel risk assessment.

If the process is similar to Australia where it is a quick, simple online process, the eTA can be a facilitation tool to ease requirements – and totally waive them in some cases – to help modernize Canada's travel documentation process. The ability to perform a pre-travel risk assessment for all foreign nationals means that Canada can start to move low-risk visa-required countries into the eTA system as they will continue to be screened by Canadian security officials. The government also anticipates that the eTAs will expedite security processing at ports of entry.<sup>39</sup>

The initial request for comments on the regulation changes included worrisome language indicating a complicated application form similar to a visa application. "...foreign nationals who require an eTA must apply online through the CIC Web site by entering mandatory biographic, passport and background information similar to the information that is currently requested by officers at ports of entry or in applications for a TRV."<sup>40</sup> Fortunately, the proposed regulations published in June 2014 make no mention of the eTA being similar to that of a TRV application.<sup>41</sup> We hope this is a sign that the government is actively looking to simplify the process, as it is imperative that eTA applications are quicker and easier than those for TRVs and that the process operates under strict service standards.

We are also concerned about the proposed Spring 2015 roll out date and hope the government will reconsider the timing to better align the new program with tourism business cycles. A Fall 2015 roll out would ensure operators would have ample time to educate their clients about the changes.

To encourage "two-nation vacations" between Canada and the US, Canada should consider accepting US Electronic System for Travel Authorization (ESTAs) for travel to Canada. There are many countries that are part of both the US and Canadian visa waiver programs and since both countries have developed a common approach to assessing threats under the Beyond the Borders Action Plan, a passenger who has been granted an ESTA for the US should not be of any more danger to Canada.

## **INTERACTIVE ADVANCE PASSENGER INFORMATION INITIATIVE (IAPI) AND TRANSIT WITHOUT VISA (TWOV)**

As part of the Beyond the Border Action Plan, the US and Canada committed to a common approach for screening travellers at the perimeter. The Government of Canada aims to detect security threats well before they reach the physical border. Working in conjunction with the eTA, the Interactive Advance Passenger Information initiative is one way to intercept security threats at an early stage. This initiative will allow the Canadian Border Services Agency (CBSA) access to air passenger information before passengers board the plane. CBSA will then notify the airline which passengers are and are not allowed to board the plane. This is an expansion of the current Advance Passenger Information/ Passenger Name Record program.

Again these additional security measures should allow for the lifting of visa requirements in some cases. In particular, this security measure should allow for the expansion of the Transfer Without Visa program in airports connecting to the US. CIC and CBSA have already established the Transit Without Visa (TWOV) program and the China Transit Program (CTP) which allows a limited number of foreign nationals to transit through Canada to the US when travelling by air on designated airlines with a US visa. Expanding this program to include more countries of origin and destination, more airlines (including code sharing flights) would increase traffic. This would have positive economic outcome. The Conference Board of Canada has estimated that expanding the TWOV program to include new origins (primarily India and China), ease restrictions to attract new carriers on flights to the US alone would generate \$270 million in GDP, 3 200 jobs and \$67 million in federal revenue.<sup>42</sup> In addition to economic benefits from increased flights into Canada, the increase in passengers and routes would create competition thus lowering the price of air travel.

## SECTION 4

# RECOMMENDATIONS

### SHORT TERM

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**Ensure new eTA rules help, not hinder visitor documentation process:** As the US and Australian models have proven, a quick and easy eTA process has little effect on visitation levels. However, the line between the eTA being an extra yet reasonable step in travel planning to a red tape hurdle that dissuades visitors is fine. The government must ensure the process from beginning to end takes less time than it does to purchase the airline ticket itself.

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**Consider a Fall 2015 roll out of the eTA program:** The proposed Spring 2015 roll out date clashes with tourism business cycles. A Fall 2015 roll out would ensure operators would have ample time to educate their clients about the changes.

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**Reinvest processing fees for more VACs and processing capabilities:** TIAC was encouraged by the 2-year, \$42 million investment for increasing visa processing capacity in the 2012 Federal Budget. However, applications keep increasing and along with them, wait times. TIAC recommends that the government invest a portion of the \$350 million<sup>43</sup> collected every year in fees be directly re-invested into the system on an ongoing basis.

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### MEDIUM TERM

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**Waive Visa Requirements from Brazil and Mexico:** TIAC sees the implementation of eTAs as an opportunity that will give security officials access to enough information on citizens from low risk countries (e.g. Brazil, Mexico) that visas for these nationals will no longer be necessary.

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**Allow for visa and eTA continuance onto new passport:** Like the US, UK and Australia, Canada should extend visas and eTAs from expired passports to new ones. In order to maintain the integrity of the program, some countries request that the traveller present both their current and old passports upon arrival.

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**Continue with and expand on fast track programs:** The government has made important progress recently with the implementation of fast track programs like:

- **CAN+ for Mexico and India:** Expedited processing for applicants who had successfully visited Canada or the US in the previous 10 years
  - **Preferred Agent Program:** Expedited processing for Chinese travel agents in good standing
  - These are effective facilitation tools that can be expanded to other countries.
- 

**Extend Pan American Games Facilitate Entry Process:** Markets in the Americas present great growth opportunities for Canadian tourism businesses. Expanding the facilitated entry process that is being proposed by the government for the family of athletes to all legitimate travellers would be an effective pilot project for the eventual relaxation of visa requirements from many low-risk countries in the Americas.

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## LONG TERM

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### **Continue to strive for clarity in application process:**

Many tour operators complain that their customers are often denied visas without an adequate explanation noting that similar/almost identical application have received positive responses.<sup>44</sup> In its report, the House of Commons Standing Committee also recommended that the government review the visa application guide to make it easier to complete.<sup>45</sup>

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### **Regional Visa Agreement with the US for visas and eTAs:**

The government's CAN+ program shows great promise as a tool to simplify screening processes by using information and security networks already available. As part of the Beyond the Border Action Plan, the US and Canada are sharing more border security information on visitors as well as aligning screening criteria. As our countries move towards a unified approach it makes more sense for Canada to consider accepting a US visa as a valid proof of security screening for visitors to Canada.

- **Citizenship and Immigration Committee made a similar recommendation:**

"Recommendation: That the Government of Canada establish a program that streamlines applications for foreign nationals who have already been screened by the United States and examine the feasibility to include those screened by the EU."<sup>46</sup>

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### **Expand Transit Without Visa using Interactive Advance Passenger Information (IAPI) system:**

Expanding the program to include more countries and airlines will increase the number of passengers. An expanded TWOV program would also help make some marginal international services more feasible. An increase in both routes and passengers will increase airlift, increase competition and lower prices.

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## SECTION 5

### APPENDICES & FOOTNOTES

#### APPENDIX 1

#### TEMPORARY RESIDENT VISA OVERSEAS PROCESSING TIMES\* (IN DAYS)

Final Decision Month	Mexico City	Sao Paulo	Chandigarh	New Delhi	Beijing	Shanghai	Hong Kong	All Posts
2013/Jan	10	17	50	6	20	19	8	20
2013/Feb	15	15	63	6	20	17	8	19
2013/Mar	18	11	71	5	13	5	7	19
2013/Apr	16	20	27	8	10	17	8	18
2013/May	20	22	15	10	7	9	6	19
2013/Jun	24	18	36	17	15	10	6	22
2013/Jul	35	30	27	24	19	16	8	26
2013/Aug	38	28	18	18	26	11	12	29
2013/Sept	15	16	32	11	12	11	7	26
2013/Oct	20	12	13	9	9	15	7	23
2013/Nov	14	13	8	9	9	14	7	21
2013/Dec	15	9	12	9	9	19	4	21
2013	24	22	32	14	16	15	8	21
*Processing time should read as: 80% of cases were completed within x days or less								

## APPENDIX 2

### GLOBAL COMPARISON OF VISA PROCESSES

Country	Number of Visa required Countries	Number of eTA required Countries	Average Visa/eTA Processing Time	Approval/ Rejection Rates	Number of VACs	Online Application for Visa?	Length of Form	Submit Passport?	Visa/ETA transfer to new passport?
<b>Canada</b>	147 <sup>1</sup>	60 (Beginning in 2015)	21 days <sup>2</sup>	83% <sup>3</sup>	133 <sup>4</sup>	Yes in some cases	4 pages	Yes <sup>5</sup>	No
<b>US</b>	155 <sup>6</sup>	31 <sup>7</sup>	Visa: 21 days to get interview <sup>8</sup>  ESTA: Immediate, 1-3 days for Authorization Pending <sup>9</sup>	78% <sup>10</sup>	NA <sup>11</sup>	Yes, but in-person interview is required <sup>12</sup>	2 pages <sup>13</sup>	Yes <sup>14</sup>	ESTA: No <sup>15</sup> Visa: Yes <sup>16</sup>
<b>UK</b>	182+ <sup>17</sup>	Electronic visa waiver (EVW): Qatar, Oman and UAE are eligible <sup>18</sup>	95% of family visitor applications within 15 days <sup>19</sup>	80% <sup>20</sup>	185+ VACs share consulate space in US and NZ <sup>21</sup>	Visa: yes <sup>22</sup>	12 pages <sup>23</sup>	Yes	Yes, carry both <sup>24</sup>
<b>Australia</b>	124 <sup>25</sup>	eVisitor: 36 eTA: 8 <sup>26</sup>	Visa: April -June 2013 Tourist: 12 days Business Visitor: 15 days <sup>27</sup>	97% in fiscal year 2012-2013 <sup>28</sup>	68 <sup>29</sup>	Yes <sup>30</sup>	Tourist Visa: 16 pages <sup>31</sup>	No <sup>32</sup>	Yes, but must notify gov't of change <sup>33</sup>
<b>EU</b>	116 <sup>34</sup>	NA	Must be processed in 10 days <sup>35</sup>	94% <sup>36</sup>	NA	No <sup>37</sup>	Visa: 3 pages <sup>38</sup>	Yes <sup>39</sup>	No <sup>40</sup>

## APPENDIX 2

### FOOTNOTES

<sup>1</sup><http://www.cic.gc.ca/english/visit/visas-all.asp>

<sup>2</sup>80% of applications are processed in 21 days. Chart from CIC “Temporary Resident Visa Overseas Processing Times”- 21 days

<sup>3</sup>Chart from CIC “Temporary Resident Visa Applications Received and Processed Overseas”

<sup>4</sup><http://www.cic.gc.ca/english/information/offices/vac/list.asp>

<sup>5</sup>Correspondence with CIC

<sup>6</sup>196-38 – Mex, Cda and Bermuda: 155 [http://www.esta.us/visa\\_waiver\\_countries.html](http://www.esta.us/visa_waiver_countries.html)

<sup>7</sup>[https://esta.cbp.dhs.gov/esta/WebHelp/ESTA\\_Screen-Level\\_Online\\_Help\\_1.htm#vwp3](https://esta.cbp.dhs.gov/esta/WebHelp/ESTA_Screen-Level_Online_Help_1.htm#vwp3)

<sup>8</sup>85% of applications are processed in 21 days. Department of State and Department of Homeland Security (Aug 2012). Executive Order 13597: Improvements to Visa Processing and Foreign Visitor processing 180-Day Progress Report. Retrieved at: [http://www.whitehouse.gov/sites/default/files/docs/eo\\_13597\\_180\\_day\\_report\\_final.pdf](http://www.whitehouse.gov/sites/default/files/docs/eo_13597_180_day_report_final.pdf) P.18

<sup>9</sup>[https://esta.cbp.dhs.gov/esta/WebHelp/ESTA\\_Screen-Level\\_Online\\_Help\\_1.htm#ata1](https://esta.cbp.dhs.gov/esta/WebHelp/ESTA_Screen-Level_Online_Help_1.htm#ata1)

<sup>10</sup><http://travel.state.gov/content/dam/visas/Statistics/Non-Immigrant-Statistics/NIVWorkload/FY2013NIVWorkloadbyVisaCategory.pdf> B1, B1/B2 and B2

<sup>11</sup>307 embassies, consulate and missions <http://www.cnn.com/2013/05/09/politics/btn-diplomatic-presence/>

<sup>12</sup><https://ceac.state.gov/genniv/>

<sup>13</sup><http://www.state.gov/documents/organization/108128.pdf>

<sup>14</sup><http://travel.state.gov/content/visas/english/visit/visitor.html#apply>

<sup>15</sup>[https://esta.cbp.dhs.gov/esta/WebHelp/ESTA\\_Screen-Level\\_Online\\_Help\\_1.htm#ta5](https://esta.cbp.dhs.gov/esta/WebHelp/ESTA_Screen-Level_Online_Help_1.htm#ta5)

<sup>16</sup>[https://help.cbp.gov/app/answers/detail/a\\_id/826/~/\\_what-to-do-if-my-visa-is-in-an-expired-passport](https://help.cbp.gov/app/answers/detail/a_id/826/~/_what-to-do-if-my-visa-is-in-an-expired-passport)

<sup>17</sup>Does not include overseas territories or disputed land. <https://www.gov.uk/find-a-visa-application-centre>

<sup>18</sup><https://www.gov.uk/government/news/uk-electronic-visa-waiver-introduced-for-oman-qatar-and-uae>

<sup>19</sup>CIMM, Protecting Canada and Canadians, Welcoming the world.

<sup>20</sup>CIMM, Protecting Canada and Canadians, Welcoming the world.

<sup>21</sup><https://www.gov.uk/find-a-visa-application-centre>

<sup>22</sup><https://www.gov.uk/apply-uk-visa>

<sup>23</sup>[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/255355/vaf1a.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/255355/vaf1a.pdf)

<sup>24</sup><https://www.gov.uk/transfer-visa>

<sup>25</sup><http://www.immi.gov.au/Services/Pages/visitor-visa-online-applications.aspx>

<sup>26</sup><http://www.immi.gov.au/Services/Pages/visitor-visa-online-applications.aspx>

<sup>27</sup>CIMM, Protecting Canada and Canadians, Welcoming the world.

<sup>28</sup>CIMM, Protecting Canada and Canadians, Welcoming the world.

<sup>29</sup><http://www.immi.gov.au/contacts/overseas/sdplocator/>

<sup>30</sup><http://www.immi.gov.au/Help/Pages/Visa-Labels.aspx>

<sup>31</sup><http://www.immi.gov.au/allforms/pdf/1419.pdf>

<sup>32</sup>[http://www.india.embassy.gov.au/ndli/vm\\_obtainlabel.html](http://www.india.embassy.gov.au/ndli/vm_obtainlabel.html)

<sup>33</sup><http://www.immi.gov.au/Help/Pages/Visa-Labels.aspx>

<sup>34</sup><http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32001R0539&from=EN> and <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32014R0509&from=EN>

<sup>35</sup>[http://europa.eu/rapid/press-release\\_IP-14-347\\_en.htm](http://europa.eu/rapid/press-release_IP-14-347_en.htm) “More flexible visa rules to boost growth and job creation”, EU press release

<sup>36</sup>[http://ec.europa.eu/dgs/home-affairs/what-we-do/policies/borders-and-visas/visa-policy/index\\_en.htm](http://ec.europa.eu/dgs/home-affairs/what-we-do/policies/borders-and-visas/visa-policy/index_en.htm)

<sup>37</sup><http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32009R0810&from=EN> art. 10, sec1

<sup>38</sup><http://www.government.nl/documents-and-publications/forms/2013/02/22/schengen-visa-application-form.html>

<sup>39</sup><http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32009R0810&from=EN>

<sup>40</sup>[http://www.windhuk.diplo.de/contentblob/2784102/Daten/4398089/Download\\_Guidelines\\_Schengen\\_Visa.pdf](http://www.windhuk.diplo.de/contentblob/2784102/Daten/4398089/Download_Guidelines_Schengen_Visa.pdf) need better source

## FOOTNOTES

<sup>1</sup>Facilitation includes: improved information delivery, facilitate current process, differentiate tourist visas, implement eVisa programs and regional agreements where a visa for one country can be accepted in another. UNWTO/WTTC. (May 2012).The Impact of Visa Facilitation on Job Creation in the G20 Economies.

<sup>2</sup>Based on theory that facilitation boosts travel by 5-25%. UNWTO/WTTC. (May 2012).The Impact of Visa Facilitation on Job Creation in the G20 Economies.

<sup>3</sup>WEF (2013). Travel & Tourism Competitiveness Index 2013, p131.

<sup>4</sup>CTC-TNS, Assessment of Visa Processes 2011- Final Report.

<sup>5</sup>CIC (2014). 2015 Pan and Parapan American Games- Citizenship and Immigration Canada Facilitated Application and Entry Process. Retrieved at: <http://www.cic.gc.ca/english/department/acts-regulations/forward-regulatory-plan/pan-parapan-games.asp>

<sup>6</sup>CIC. Personal Correspondence. July 10, 2014.

<sup>7</sup>CTV News (Sept 26, 2013). Striking Diplomats Reach Tentative Agreement with Ottawa. Retrieved at: <http://www.ctvnews.ca/politics/striking-diplomats-reach-tentative-agreement-with-ottawa-1.1472545>

<sup>8</sup>CIC, Temporary Resident Visa Overseas Processing Times (in Days).

<sup>9</sup>CIMM (March 2014). Protecting Canada and Canadians, Welcoming the World: A modern visa system to help Canada seize the moment. HOC.

<sup>10</sup>Government of Canada Response to the Second Report of the Standing Committee on Citizenship and Immigration, "Protecting Canada and Canadians, Welcoming the World: A Modern Visa System to Help Canada Seize the Moment"

<sup>11</sup>CIMM, Protecting Canada and Canadians, Welcoming the World: A modern visa system to help Canada seize the moment. March 2014. HOC. 35-36.

<sup>12</sup>Government of Canada Response to the Second Report of the Standing Committee on Citizenship and Immigration, "Protecting Canada and Canadians, Welcoming the World: A Modern Visa System to Help Canada Seize the Moment"

<sup>13</sup>UNWTO, World Tourism Barometer, April 2014.

<sup>14</sup>TIAC, CTC and Nanos,(2013). Nanos Tourism Industry Survey, p.7.

<sup>15</sup>Neumayer, E. (2010). Visa Restrictions and Bilateral Travel. The Professional Geographer, 62(2), 171-181 and CTC (2013). Year in Review for visitor spend per country.

<sup>16</sup>UNWTO and WTTC (2012). The Impact of Visa Facilitation on Job Creation in the G20 Economies.

<sup>17</sup>Based on theory that facilitation boosts travel by 5-25%. UNWTO/WTTC. (May 2012).The Impact of Visa Facilitation on Job Creation in the G20 Economies and CTC (2013). Year in Review.

<sup>18</sup>Government of Canada (June 21, 2014). Regulations Amending the Immigration and Refugee Protection Regulations. Retrieved at: <http://www.gazette.gc.ca/rp-pr/p1/2014/2014-06-21/html/reg1-eng.php>

<sup>19</sup>Deloitte (2014), Passport to Growth: How international arrivals stimulate Canadian exports.

<sup>20</sup>Neumeyer, Eric (2011). On the detrimental impact of visa restrictions on bilateral trade and foreign direct investment. Applied Geography 31. 901-907.

<sup>21</sup>CTC (2013). Year in Review 2012.

<sup>22</sup>TNS (ND). Impact of VFR: Visiting Friends and Relatives. Ontario Ministry of Tourism Sport and Culture. Retrieved at : [http://www.mtc.gov.on.ca/en/research/studies/Impact\\_of\\_VFR.pdf](http://www.mtc.gov.on.ca/en/research/studies/Impact_of_VFR.pdf)

<sup>23</sup>Statistics Canada (2012). National Household Survey.

<sup>24</sup>Calculations based on Neumayer theory and the Canadian Tourism Commission visitor spend information.

<sup>25</sup>Calculations based on Neumayer theory and the Canadian Tourism Commission visitor spend information.

<sup>26</sup>Calculations based on Neumayer theory and the Canadian Tourism Commission visitor spend information.

<sup>27</sup>Calculating a 31% increase of the Mexican visitation numbers from 2009 to 2013 and multiplying each year by its respective average spend per trip quantifies the missed opportunities. This is a conservative estimate as Mexican visas dropped significantly the two years following the implication of the visa. We found that another 320,000 Mexican would have visited and spent over \$465 million dollars. The additional revenue would have supported another Canadian 3400 jobs (CTC jobs multiplier, email exchange with Michel Dubreuil February 18, 2014). From the imposition of the visa in 2009 to 2013 Canadian exports to Mexico were worth \$31.9 billion. (Industry Canada (2014). Trade Data Online. Retrieved at <https://www.ic.gc.ca/app/scr/tdst/tdo/crtr.html?productType=NAICS&lang=eng>). Having the visas in place means we missed out on up to \$7.5 billion in trade (Based on Neumeyer, Eric (2011). On the detrimental impact of visa restrictions on bilateral trade and foreign direct investment. Applied Geography 31. 901-907.)

<sup>28</sup>US National Travel and Tourism Office (2013). Market Profile: Chile.

<sup>29</sup>US Department of State, Bureau of Consular Affairs. Adjusted Refusal Rate – B-Visas only- by Nationality. Fiscal Year 2007 and 2013.

<sup>30</sup>Applying Neumeyer's theory that visa restrictions diminish visitation rates by 31% by using 2012 numbers for Chile. National Travel and Tourism Office (2013). Market Profile: Chile.

<sup>31</sup>Applying Neumeyer's theory that unilateral visa restrictions diminish exports by 19% by using 2012 numbers for exports to Chile. Office of the United States Trade Representative (2013). Market Profile: Chile. Retrieved at: <http://www.ustr.gov/countries-regions/americas/chile>

<sup>32</sup>Applying Neumeyer's theory that unilateral visa restrictions diminish exports by 19% . Industry Canada. Trade Data Online

<sup>33</sup>Bruce Wallace (January 28, 2014). Brazilians are taking New York City by storm – with their cash. Public Radio International's The World.

<sup>34</sup>National Travel and Tourism Office (2013). Market Profile: Brazil and CTC (2013). Year in Review.

<sup>35</sup>US Travel Association (July 12, 2012). US Travel Commends Visa Waiver Program Working Group with Brazil.

<sup>36</sup>US Department of State (April 13, 2013). Remarks with Brazilian Foreign Minister Antonio de Aguiar Patriota After Their Meeting. Retrieved at: <http://www.state.gov/secretary/remarks/2013/08/213105.htm>

<sup>37</sup>CTC (2013). Year in Review and Industry Canada. Trade Data Online.

<sup>38</sup>CIC Help Centre: How do I get help if my Visa Application is Refused? <http://www.cic.gc.ca/english/helpcentre/answer.asp?q=422&t=16>

<sup>39</sup>Canada Gazette Part 1 (7 December 2013). Notice Requesting comments on a proposal to amend the Immigration and Refugee Protection Regulations to establish the electronic travel authorization.P.2754.

<sup>40</sup>Canada Gazette Part 1 (7 December 2013). Notice Requesting comments on a proposal to amend the Immigration and Refugee Protection Regulations to establish the electronic travel authorization.P.2754.

<sup>41</sup>Canada Gazette Part 1 (21 June 2014). Proposed Regulations Accessed at <http://www.gazette.gc.ca/rp-pr/p1/2014/2014-06-21/html/reg1-eng.php>

<sup>42</sup>Conference Board of Canada. Growing Canada's Economy: A New National Air Transportation Policy.

<sup>43</sup><http://www.cic.gc.ca/english/resources/publications/finance/statement2013.asp>

<sup>44</sup>CTC-TNS, Assessment of Visa Processes 2011- Final Report

<sup>45</sup>CIMM, Protecting Canada and Canadians, Welcoming the World: A modern visa system to help Canada seize the moment.

<sup>46</sup>CIMM, Protecting Canada and Canadians, Welcoming the World: A modern visa system to help Canada seize the moment

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