Tourism in Canada
Seizing economic growth
Contents

Executive summary ................................................................. 2
Canada's tourism challenge.......................................................... 3
Seizing the opportunities............................................................ 8
Message to government: Keep the momentum going ........ 11
Visa barriers for visitors to Canada ............................................. 13
Competitiveness of Canada’s air transportation industry .... 22
  Cost structure ........................................................................... 23
  Air access to Canada ................................................................. 26
Marketing Canada as a travel destination ......................... 32
Summary .................................................................................. 38
Appendix 1 ............................................................................... 41
Appendix 2 ............................................................................... 42
Appendix 3 ............................................................................... 43
International tourism is accelerating at a fast pace globally and brings significant economic benefits to the countries that are able to attract international visitors. But Canada’s performance in attracting these visitors is lagging behind virtually all of its competitors.

This submission is a call to action to the federal government to build on the initiatives it has already undertaken and seize the economic opportunities available by making strategic and targeted changes to policies and resources which together would allow Canada to regain its competitive position as a leading destination for the world’s travellers.
The global tourism market generates US$1.2 trillion in tourism receipts and is growing rapidly. While growth in international tourist arrivals globally was 5% in 2013, Canada saw growth of only 1.5%.

Taking action to level the playing field and allow for an increase in Canada’s share of this growing market would have significant economic benefits. Numerous industries across the economy would benefit, new jobs would be created, federal revenues would increase and, over time, exports would rise.

In light of the importance of these issues for the tourism industry and Canada, a broad group of stakeholders representing regions and business tourism organizations across Canada commissioned Deloitte to study the opportunities for improving Canada’s position as a destination for international travellers. In preparing this submission, Deloitte carried out secondary research, stakeholder interviews and economic modelling.

The federal government has made some progress in support of a healthier tourism sector through its Federal Tourism Strategy and other broader structural policies. Further improvements are required for Canada to become more competitive in the market for global travellers. Such improvements would have wide-ranging economic benefits.

The Canadian tourism industry is united in its belief of the need to focus on a combination of reducing the visa barriers for visitors to Canada, increasing the competitiveness of Canada’s air transportation industry by addressing our cost structure and opening up more routes and capacity, and considering innovative funding approaches to increase the Canadian Tourism Commission’s investment into marketing Canada as an international travel destination.

These improvements are needed to level the playing field between Canada and its competitors in the market for international tourists.

This study demonstrates that levelling the playing field would allow Canada to reach the goal of a 7% growth rate in international tourist arrivals. By 2017, this would result in 3.8 million new arrivals, $2.9 billion of additional tourism spending, an increase of $2.5 billion in GDP, and 21,000 to 40,000 new jobs. Over time, this would also result in a $6.1 billion increase in exports.
Tourism is a large and high-growth industry that significantly impacts the global economy. In 2013, there were over a billion international tourists worldwide, creating US$1.2 trillion (C$1.35 trillion) in receipts\(^1\).

In 2013, tourism contributed $84 billion to Canada’s economy, representing 2% of GDP\(^2\). Tourism activity in Canada contributed $22 billion in federal government revenue in 2012 and employed more than 618,000 people\(^3\) in 2013. Opportunities exist for Canada to profit more from the high growth in the global tourism market.

In 2013, global tourism receipts have more than doubled since 2000. \(^1\)United Nations World Tourism Organization, \(^2\)Statistics Canada, \(^3\)Canadian Tourism Commission 2013 annual report
Canada’s ranking for international tourist arrivals fell from 8th in 2000 to 17th in 2013. Canada is one of the very few top 20 tourism countries that has actually seen international tourist arrivals fall. For Canada to have achieved the 8th spot in 2013, the number of arrivals would have had to be 9 million higher, or 28.5 million in total, which would have required cumulative annual growth at a rate of at least 3% over the period.

Global Rankings: International Tourist Arrivals

Since 2000, Canada has dropped 9 spots and has experienced a 15% decline in international tourists.

Source: United Nations World Tourism Organization - World Tourism Barometer
Domestic travel within Canada has grown steadily since 2000, while US travel to Canada has declined and international travel to Canada has remained relatively flat. While strong domestic growth has helped Canada’s tourism sector, the lack of growth in US and international arrivals has resulted in a loss of market share and forgone economic benefit. This loss of market share is a direct loss to Canada’s economy, as international travellers inject new monies into Canada, like any export industry.

Tourism spending in Canada from 1998-2012 (in billions)

Source: United Nations World Tourism Organization
Canada also has a travel deficit, with Canadians spending $17.8 billion more abroad in 2013 than foreigners spent in Canada. This travel deficit has increased steadily since 2001. Canada’s travel deficit grew at a cumulative annual growth rate of 20% from 2001 to 2012 (from $2 billion in 2001 to $17.8 billion in 2012). The cumulative travel deficit during the period is $105 billion.

In contrast, the US is experiencing a growing travel surplus. In 2012, the travel surplus for the US reached $47.5 billion.

Source: Statistics Canada, Deloitte 'Passport to Growth'

Source: International Trade Administration: Office of Travel & Tourism Industries
In 2013, the growth in international tourist arrivals globally was 5%, while Canada saw growth of only 1.5%. If Canada achieved a 5% growth rate, it would see an increase in tourism spending of $2 billion and 15,000 to 28,000 additional jobs over the next 3 years.

This report will highlight the even greater potential returns that could be realized by addressing barriers faced by the Canadian tourism industry.
Tourism is a trillion dollar global industry and is one of the fastest growing industries in the world, having risen 4% on average over the 2000 to 2012 period – a period that includes the global recession during which international travel was significantly curtailed. Only fuels, chemicals and foods surpass tourism in terms of international export volume*.

The travel and tourism sector impacts numerous industries and businesses across the economy. Businesses that benefit, directly and indirectly, from a strong tourism sector include transportation, accommodations, meetings and conferences, food and beverage, attractions, festivals and events, other retail and real estate/realty finance.

---

Tourism is not 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.
The travel and tourism sector also provides significant indirect benefits to the Canadian economy. According to Deloitte analysis, a $100 million increase in direct spending on tourism would generate $69 million in indirect spending—an increase in indirect spending that is more than the same increase in direct spending would generate in many other key sectors. The impact on jobs from increased revenues in tourism is far greater than similar increases in the mining or oil & gas industries.

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

<table>
<thead>
<tr>
<th>Industry</th>
<th>Indirect Output</th>
<th>New Job Creation*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism</td>
<td>$69 million</td>
<td>1,373 new jobs</td>
</tr>
<tr>
<td>Health support services</td>
<td>$41 million</td>
<td>1,376 new jobs</td>
</tr>
<tr>
<td>Automotive**</td>
<td>$51 million</td>
<td>353 new jobs</td>
</tr>
<tr>
<td>Mining***</td>
<td>$50 million</td>
<td>438 new jobs</td>
</tr>
<tr>
<td>Oil and Gas</td>
<td>$50 million</td>
<td>326 new jobs</td>
</tr>
</tbody>
</table>

Source: Statistics Canada (Input-Output National Multipliers, 2009)
*Calculated in person years of employment
**Automobile and light-duty motor vehicle manufacturing industry (Statistics Canada)
***Coal mining, metal ore mining, and non-metallic mineral mining and quarrying
Tourism is already an important industry for Canada, representing 2% of GDP and 2.9% of total exports, but could contribute more to our economic performance. The opportunities are there for Canada to regain its standing as a top international tourist destination. However, in order for Canada to realize these opportunities, we need to ensure the framework is in place to allow Canada to be competitive.

Achieving a higher annual sustained growth rate for international arrivals in Canada going forward would have significant economic benefits for Canada. For example, if the growth rate for international arrivals to Canada merely grew at the global average rate of 5%, overall spending in the economy would increase by $2 billion, federal revenues would increase by $250 million and 15,000 to 28,000 jobs would be created over the next 3 years. In addition, over time, Canadian exports would increase by $4.4 billion⁴.

The tourism industry is united in believing that to seize these opportunities, Canada needs to be competitive in terms of:

- the visa barriers visitors face – which means addressing travel visa exemptions and travel visa administration;
- a place for domestic and foreign airlines to operate and to set up business – which means reducing costs and opening more routes and capacity;
- the profile of Canada as a destination for international travel – which means finding ways to increase funding for marketing.

⁴Deloitte Passport to Growth: How international arrivals stimulate Canadian exports
Message to government: seize the opportunities

The federal government has made some initial strides into improving the policy framework for tourism in Canada through its Federal Tourism Strategy and whole-of-government approach to supporting Canada’s tourism industry. Further strategic and targeted improvements need to be made to reduce visa barriers, reduce air transportation costs, liberalize air access by opening more routes and capacity, and grow national tourism marketing funding.
Federal actions to date have been helpful.

- Under the Blue Sky Policy, Canada has concluded new or expanded Air Transport Agreements covering over 80 countries.
- The federal government has also taken a number of positive steps with regard to the visa process – targeting key markets to improve processing times, expanding the number of Visa Application Centres, improving on-line services, and investing in enhanced capacity to issue visitor visas.
- In addition, the federal government has put in place broader structural policies to strengthen the competitive landscape for Canadian businesses generally, such as lowering corporate tax rates and the GST, reducing red tape and paper burden for businesses, and negotiating free trade agreements.

The industry is calling on the federal government to make further improvements to allow Canada to regain its position as a top international tourist destination. These improvements would focus on:

1. Removing visa barriers for visitors to Canada;
2. Increasing competitiveness of Canada’s air transportation industry: reducing costs and opening more routes and capacity;
3. Increase funding for marketing Canada as a travel destination.

Strategic and targeted improvements in each of these three areas would allow Canada to become more competitive in the global tourism market, which would bring significant economic benefits to the country, including the sustained growth in global tourism necessary to offset the declines of the last decade.
Visa barriers for visitors to Canada

Visitor visas play an important role in maintaining security and regulating immigration. At the same time, the visa process for tourists is often considered onerous and deters people from traveling to Canada. In cases where a country’s citizens are exempt from visa requirements, such as the US and UK, the process for entering Canada is expedited.

The introduction of visa restrictions has a demonstrated direct impact on travel. Clear evidence of this can be gleaned from the impact of the announcement by the federal government, in July 2009, that all Mexican citizens would require a visa to travel to Canada. In the first year after this announcement, overnight visits from Mexico fell 48%. It has been estimated that in-bound visitation to North America is over 30% lower, on average, when there is a visa requirement for citizens from that country⁵.

Further evidence of the impact of visa restrictions on international travel can be seen in the following chart, which shows the dramatic increase, decrease and subsequent increase in the number of travelers from the Czech Republic to Canada when visa restrictions were lifted in 2007, imposed in 2009 and lifted again in 2013.

*Prorated based on data available from Jan – July 2014
Green bar denotes visa restrictions lifted, Red bar denotes visa restrictions implemented
Source: Statistics Canada
With the growth of international tourism by citizens of countries such as China, Brazil, India and Mexico, where Canada imposes a visa requirement, the impact of onerous visa requirements on Canada’s international tourist market is accentuated.

The process for obtaining a visa to visit Canada is often considered more onerous than for competitor countries. The process generally involves potential visitors gathering required documents, completing an application form, and submitting the application by mail or in person to the Canadian visa office or visa application centre, but can be slowed down by the requirement for an interview or biometrics and/or from processing delays due to a shortage of visa officers or outdated technology.

Nearly 60% of Brazilians who are not interested in visiting Canada cite visa/passport issues as a reason, which illustrates the significant impact visa requirements have on international travel to Canada⁶.

⁶Canadian Tourism Commission (2011), Global Tourism Watch: Brazil Report
In addition, processing delays for visitor visas to Canada have increased over the past decade, and visitor visa processing times in Canada are significantly longer than processing times in Australia and the US.

**Temporary Canadian Resident Visa Overseas Processing Times*** (In Days)

- Processing times for travel visas have more than quadrupled in the past 11 years.
- Tourist visa processing times in Canada are significantly higher than processing times in Australia and the U.S.

Source: TIAC Gateway to Growth: Progress Report on Canadian Visitor Visa Process
*Processing time refers to: 80% of cases completed within x days or less

**2012 Average Travel Visa Overseas Processing Times*** (In Days)

- Canadian processing times for tourist visas have more than quadrupled in the past 11 years.
- Tourist visa processing times in Canada are significantly higher than processing times in Australia and the U.S.

*Processing time refers to: 80% of cases completed within x days or less
Thanks to changes announced in Economic Action Plan 2013, both the backlog and processing time of Canadian citizenship applications will be reduced.

For example, the legislative changes to the Canadian Citizenship Act announced in Economic Action Plan 2013 will reduce both the backlog and processing time of citizenship applications. The proposed reforms will reduce the decision-making process from 3 steps to 1. This will cut the processing time by almost 2 years.

Tourism stakeholders are calling on the federal government to achieve similar improvements to the visitor visa process.
Canadian tourism stakeholders recognize and appreciate the significant improvements in the visitor visa process the federal government has made in recent years.

- Express Service is improving service in key markets, such as New Delhi and Shanghai, although continued efforts are required;
- The introduction of new visa application centres and electronic processing will help to further improve processing time;
- Increased funding to support enhanced processing capacity within the Temporary Resident Program, which issues visitor visas, will help to further improve the process;
- The recent announcement of the launch of a new program to expedite visa processing for some Mexican travellers will help grow international travel into Canada.

Making strategic and targeted changes to address visa barriers for visitors to Canada would create significant economic benefits and foster trade.
But more needs to be done to improve the situation for visitors to Canada. Examples include:

1. Providing a visa exemption for citizens of Mexico and Brazil, and considering visa exemptions for citizens of additional countries.

   The concerns that led to the visa restriction on visitors from Mexico should be adequately addressed by new legislation shortening refugee application processing times.

   The US may be considering extending a visa exemption to Brazilian visitors. The EU already provides such an exemption. Canada could benefit from being the first country in North America to provide a visa exemption to visitors from Brazil. If Canada does not move before or in tandem with the US, it will become even less competitive in the market for Brazilian tourists. In fact, the first to move on this will be the long-term winner. Visa exemptions could also be considered for other countries where the immigration and security risks are manageable and the potential international tourism benefits are substantial.

2. Working with the US to provide dual-country visas for visitors from other countries.

   Canada’s sovereign immigration policy would not be threatened by having a Canada/US reciprocal visa program, provided the immigration policy of both countries was taken into account in the implementation of such a program. Such an approach could focus on countries where the immigration and security risks are lowest and the potential benefits to Canada in terms of tourist travel are greatest. As a starting point, visitors from Brazil and Mexico (to the extent that an exemption is not yet provided), and China and India could be considered for such a program.

Wherever possible, Canada should ensure that its visa approach meets or exceeds those of its trading partners.
Eliminating the visa requirement for Mexico and Brazil could increase visitors to Canada from those countries by 30% or more. If growth then continued at the global average of 5% per year, there would be 102,000 more international arrivals from the two source markets by 2017.

- With average spending of $1,650 per visit from Mexican and Brazilian tourists, this would increase overall tourism spending in Canada by $168 million by 2017.

- Using Statistics Canada multipliers, Deloitte has carried out analysis showing that this additional spending would have direct and indirect impacts resulting in an increase of $143 million of GDP and 1,200 to 2,300 new jobs by 2017.

Streamlining the visitor visa process for India and China would also increase visitors to Canada from those countries. Even if the initial growth impact was half of that of lifting the visa requirement altogether, there would be 141,000 more international arrivals by 2017.

- This would increase overall tourism spending in Canada by $219 million by 2017 from the two markets.

- Deloitte analysis shows that this additional spending would have direct and indirect impacts resulting in an increase of $187 million of GDP and 1,600 to 3,000 new jobs by 2017.

- Streamlining the visitor visa process for additional countries would further add to this positive impact.
### Examples of economic benefits from removal of visa barriers (2015 - 2017)*

**Mexico**
- **$94M** increase in overall tourism spending
- **64,000** incremental increase in arrivals
- **211,000** projected 2017 arrivals
- **$80M** increase in GDP
- **700 - 1,300** in new jobs
- **$12M** increase in federal revenue

**Brazil**
- **$74M** increase in overall tourism spending
- **38,000** incremental increase in arrivals
- **125,000** projected 2017 arrivals
- **$63M** increase in GDP
- **500 - 1,000** in new jobs
- **$9M** increase in federal revenue

**India**
- **$46M** increase in overall tourism spending
- **43,000** incremental increase in arrivals
- **204,000** projected 2017 arrivals
- **$39M** increase in GDP
- **300 - 600** in new jobs
- **$6M** increase in federal revenue

**China**
- **$174M** increase in overall tourism spending
- **98,000** incremental increase in arrivals
- **462,000** projected 2017 arrivals
- **$148M** increase in GDP
- **1,300 - 2,000** in new jobs
- **$21M** increase in federal revenue

*Growth rate assumptions
- 2014 arrivals derived from applying historical 2012 arrivals growth rate to 2012 arrivals.
- 30% in arrivals growth for Brazil and Mexico in 2014. 5% in subsequent years.
- 15% in arrivals growth for China and India in 2014. 5% in subsequent years.
Both cost structure and air access play important roles in the competitiveness of Canada as a location for airlines to operate, be it Canadian or foreign. The higher price of air travel is a significant competitive disadvantage for Canada when attracting tourists from international markets. It also hampers domestic travel and encourages outbound travel from US border airports. Restrictive air agreements also affect Canada’s competitiveness.

When properly targeted and implemented, liberalized air policy helps to ensure a greater variety and volume of air routes, more competitive airfares, and a resulting increase in passenger traffic. Liberalized air policy can also bring greater marketing dollars into Canada from foreign carriers, and free marketing of Canada by these carriers abroad.
Cost structure

Fees and charges faced by the air transportation industry have been shown to negatively impact travel patterns and passenger demand. These fees and charges affect the price charged by both Canadian and foreign airlines for flights within, to and from Canada.

Estimate of differences in airfare costs between U.S. and Canada

Airline Base Fare is approximately 43% higher at a Canadian airport vs. U.S. border airport

Fees and Taxes are approximately 35% higher at a Canadian airport vs. U.S. border airport

Source: Conference Board of Canada
Airlines operating from a Canadian airport charge a base fare that is approximately 43% higher than airlines operating from a US airport, largely due to airport ground rent and navigational fees. Canadian airfares also include fees and taxes that are approximately 35% higher than those included in US airfares, largely due to international fees and sales taxes. Structural costs put Canadian airports at a price disadvantage when compared to their cross-border counterparts.

Not surprisingly, this translates into lower prices for international flights to large US cities vs. those to large Canadian cities.

### Comparison of flight costs from international destinations to comparable Canadian and U.S. cities

<table>
<thead>
<tr>
<th>U.S. Arrival City</th>
<th>Canadian Arrival City</th>
<th>Cheapest Flight Cost (CAD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chicago</td>
<td>Toronto</td>
<td></td>
</tr>
<tr>
<td>Amsterdam</td>
<td>New York</td>
<td>$131 (12%)</td>
</tr>
<tr>
<td>London</td>
<td>New York</td>
<td>$301 (25%)</td>
</tr>
<tr>
<td>Sao Paulo</td>
<td>New York</td>
<td>$230 (23%)</td>
</tr>
<tr>
<td>Tokyo</td>
<td>Los Angeles</td>
<td>$922 (48%)</td>
</tr>
<tr>
<td>Beijing</td>
<td>Vancouver</td>
<td>$128 (10%)</td>
</tr>
<tr>
<td>Panama City</td>
<td>Toronto</td>
<td>$74 (4%)</td>
</tr>
<tr>
<td>Sydney</td>
<td>Los Angeles</td>
<td>$742 (46%)</td>
</tr>
<tr>
<td>New York</td>
<td>Vancouver</td>
<td>$646 (26%)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$209 (34%)</td>
</tr>
</tbody>
</table>


Average: $398 (24%)
It is clear that the cost structure applied to the Canadian air transport industry has important implications for Canada’s competitiveness in tourism:

- International travellers may choose less expensive destinations than Canada, or travel to Canada through the US;
- Canadian travellers may choose to fly to international destinations from US airports;
- Or worse, Canadian travellers may choose not to travel at all, whether to a domestic or an international destination; and
- There is a lack of new domestic players in the airline industry – greater competition would lower ticket prices. While two new low-cost airlines are reported to be setting up to launch in Canada - Jetlines and Jet Naked - previous attempts by low-cost airlines to enter the Canadian market have failed. One of the key factors for this lack of success is that the fees and taxes imposed on airlines are much higher in Canada than in many other jurisdictions.

In short, a lack of competition and high costs mean less international tourist visitors to Canada, which means less economic benefit, less jobs, less exports and less government revenue.

Tourism stakeholders welcome the federal government’s announcement on June 14, 2014 of a review of the competitiveness of Canada’s aviation cost structure as part of the review of the Canada Transportation Act.

It is estimated that five million Canadians are crossing the US border on land every year to fly from US airports, resulting in approximately $3.5 billion of airfares and taxes going to the US vs. Canada. This is being driven by lower airfare offered by US carriers.\(^7\)

\(^7\)The Conference Board of Canada. Driven away: Why more Canadians are choosing cross border airports
The federal government has made the Blue Sky policy a priority and has indicated it “will continue to negotiate new and expanded agreements to promote the interests of Canadian consumers, as well as our trade and tourism sectors”.

Air access to Canada

Air access policy is implemented through bilateral agreements which govern commercial aviation between countries. These agreements cover, among other things, the routes airlines can fly, the number of flights that can be operated, the number of passengers that can be carried, and the specific airlines permitted to operate between the two countries.

Liberalization of air policy has a long history of demonstrated success in growing passenger traffic:

- Liberalization within the EU resulted in the development of low-cost carriers and was a factor in the tripling of air travel in Europe over the 1980 to 2000 period.

- In the first five years after the 1995 Canada-US Air Transport Agreement (a free trade agreement on air access between Canada and the US), the number of trips by air rose 40%.

- Travel between Australia and New Zealand increased by 40% between 2000 and 2004, after the 2000 Australia-New Zealand air agreement.

- Travel between Vancouver and San Diego increased over 95% and travel between Vancouver and Chengdu/Shenyang increased over 300% when new service started up, following air liberalization between Canada and the US, and Canada and China⁸.

⁸Vancouver airport authority data.
Air liberalization played a significant role in expanding passenger traffic between many Canadian and US routes.

Despite progress toward more open skies, Canada’s air policy is considered restrictive relative to other major global tourism nations.
Growth in passenger traffic of selected Canadian and US routes*

Source: Economic impact of Air Service Liberalization (InterVistas)

Competitiveness of international air agreements

<table>
<thead>
<tr>
<th>Competitive indicators</th>
<th>Canadian Ranking</th>
<th>US Ranking</th>
<th>UK Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Liberalization Index*</td>
<td>83rd best in the world</td>
<td>16th best in the world</td>
<td>26th best in the world</td>
</tr>
</tbody>
</table>

*Experts assign weights to different aspects of Air Service Agreements (e.g. grant of rights, tariff approval, etc.)

<table>
<thead>
<tr>
<th></th>
<th>Canada</th>
<th>US</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of agreements</td>
<td>98</td>
<td>138</td>
</tr>
<tr>
<td>Number of open, non-restrictive agreements</td>
<td>16</td>
<td>110</td>
</tr>
<tr>
<td>Share of agreements considered open and non-restrictive</td>
<td>16%</td>
<td>80%</td>
</tr>
</tbody>
</table>

Source: World Trade Organization, TiAC gateway to growth: aiming high - air access to Canada
Some have criticized the implementation of Canada’s air liberalization policy on the basis that negotiations are not transparent and that there appears to be a reluctance to sign agreements with countries that have subsidized carriers.

In order to focus its efforts in negotiating Air Transport Agreements in a manner that is most likely to benefit Canada and the tourism industry, the federal government should target countries where, for example, there is interest by the partner country to use the expanded capacity, Canadian airlines are confident they will be able to obtain the same level of access as airlines in the partner country have in Canada, and residents of the partner country have a strong connection to Canada.

Stakeholders are asking the government to enter into targeted liberalized agreements, and to ensure that the negotiation process is transparent.
Addressing cost structure would result in an increase in competition in Canada, leading to lower ticket prices and greater air travel.

Lower fees/charges leading to lower and more competitive airfares would increase the demand for international travel to Canada and create economic benefits for the country. A $25 decrease in airfares driven by lower fees/charges would result in an increase of $182 million of GDP and 445,000 additional travellers (including US). As an example, this fare reduction is in line with the differential found in research by the Buffalo Niagara International Airport between fees/charges per passenger at Pearson International Airport and those at the Buffalo airport.

More liberalized air access, which includes opening more routes, would also create more competition and lower airfares in Canada. These changes will help level the playing field for Canada’s air transportation industry, and increase international visitors to Canada. In addition, when new carriers enter a market, their marketing and promotional efforts help to create awareness of new routes and ultimately stimulate travel.

Summary: competitiveness of Canada’s air transportation industry

Addressing cost structure would result in an increase in competition in Canada, leading to lower ticket prices and greater air travel.

Lower fees/charges leading to lower and more competitive airfares would increase the demand for international travel to Canada and create economic benefits for the country. A $25 decrease in airfares driven by lower fees/charges would result in an increase of $182 million of GDP and 445,000 additional travellers (including US). As an example, this fare reduction is in line with the differential found in research by the Buffalo Niagara International Airport between fees/charges per passenger at Pearson International Airport and those at the Buffalo airport.

More liberalized air access, which includes opening more routes, would also create more competition and lower airfares in Canada. These changes will help level the playing field for Canada’s air transportation industry, and increase international visitors to Canada. In addition, when new carriers enter a market, their marketing and promotional efforts help to create awareness of new routes and ultimately stimulate travel.

Summary: competitiveness of Canada’s air transportation industry

Addressing cost structure would result in an increase in competition in Canada, leading to lower ticket prices and greater air travel.

Lower fees/charges leading to lower and more competitive airfares would increase the demand for international travel to Canada and create economic benefits for the country. A $25 decrease in airfares driven by lower fees/charges would result in an increase of $182 million of GDP and 445,000 additional travellers (including US). As an example, this fare reduction is in line with the differential found in research by the Buffalo Niagara International Airport between fees/charges per passenger at Pearson International Airport and those at the Buffalo airport.

More liberalized air access, which includes opening more routes, would also create more competition and lower airfares in Canada. These changes will help level the playing field for Canada’s air transportation industry, and increase international visitors to Canada. In addition, when new carriers enter a market, their marketing and promotional efforts help to create awareness of new routes and ultimately stimulate travel.

Summary: competitiveness of Canada’s air transportation industry

Addressing cost structure would result in an increase in competition in Canada, leading to lower ticket prices and greater air travel.

Lower fees/charges leading to lower and more competitive airfares would increase the demand for international travel to Canada and create economic benefits for the country. A $25 decrease in airfares driven by lower fees/charges would result in an increase of $182 million of GDP and 445,000 additional travellers (including US). As an example, this fare reduction is in line with the differential found in research by the Buffalo Niagara International Airport between fees/charges per passenger at Pearson International Airport and those at the Buffalo airport.

More liberalized air access, which includes opening more routes, would also create more competition and lower airfares in Canada. These changes will help level the playing field for Canada’s air transportation industry, and increase international visitors to Canada. In addition, when new carriers enter a market, their marketing and promotional efforts help to create awareness of new routes and ultimately stimulate travel.

Summary: competitiveness of Canada’s air transportation industry

Addressing cost structure would result in an increase in competition in Canada, leading to lower ticket prices and greater air travel.

Lower fees/charges leading to lower and more competitive airfares would increase the demand for international travel to Canada and create economic benefits for the country. A $25 decrease in airfares driven by lower fees/charges would result in an increase of $182 million of GDP and 445,000 additional travellers (including US). As an example, this fare reduction is in line with the differential found in research by the Buffalo Niagara International Airport between fees/charges per passenger at Pearson International Airport and those at the Buffalo airport.

More liberalized air access, which includes opening more routes, would also create more competition and lower airfares in Canada. These changes will help level the playing field for Canada’s air transportation industry, and increase international visitors to Canada. In addition, when new carriers enter a market, their marketing and promotional efforts help to create awareness of new routes and ultimately stimulate travel.

Summary: competitiveness of Canada’s air transportation industry

Addressing cost structure would result in an increase in competition in Canada, leading to lower ticket prices and greater air travel.

Lower fees/charges leading to lower and more competitive airfares would increase the demand for international travel to Canada and create economic benefits for the country. A $25 decrease in airfares driven by lower fees/charges would result in an increase of $182 million of GDP and 445,000 additional travellers (including US). As an example, this fare reduction is in line with the differential found in research by the Buffalo Niagara International Airport between fees/charges per passenger at Pearson International Airport and those at the Buffalo airport.

More liberalized air access, which includes opening more routes, would also create more competition and lower airfares in Canada. These changes will help level the playing field for Canada’s air transportation industry, and increase international visitors to Canada. In addition, when new carriers enter a market, their marketing and promotional efforts help to create awareness of new routes and ultimately stimulate travel.

Summary: competitiveness of Canada’s air transportation industry

Addressing cost structure would result in an increase in competition in Canada, leading to lower ticket prices and greater air travel.

Lower fees/charges leading to lower and more competitive airfares would increase the demand for international travel to Canada and create economic benefits for the country. A $25 decrease in airfares driven by lower fees/charges would result in an increase of $182 million of GDP and 445,000 additional travellers (including US). As an example, this fare reduction is in line with the differential found in research by the Buffalo Niagara International Airport between fees/charges per passenger at Pearson International Airport and those at the Buffalo airport.

More liberalized air access, which includes opening more routes, would also create more competition and lower airfares in Canada. These changes will help level the playing field for Canada’s air transportation industry, and increase international visitors to Canada. In addition, when new carriers enter a market, their marketing and promotional efforts help to create awareness of new routes and ultimately stimulate travel.

Summary: competitiveness of Canada’s air transportation industry

Addressing cost structure would result in an increase in competition in Canada, leading to lower ticket prices and greater air travel.

Lower fees/charges leading to lower and more competitive airfares would increase the demand for international travel to Canada and create economic benefits for the country. A $25 decrease in airfares driven by lower fees/charges would result in an increase of $182 million of GDP and 445,000 additional travellers (including US). As an example, this fare reduction is in line with the differential found in research by the Buffalo Niagara International Airport between fees/charges per passenger at Pearson International Airport and those at the Buffalo airport.

More liberalized air access, which includes opening more routes, would also create more competition and lower airfares in Canada. These changes will help level the playing field for Canada’s air transportation industry, and increase international visitors to Canada. In addition, when new carriers enter a market, their marketing and promotional efforts help to create awareness of new routes and ultimately stimulate travel.

Summary: competitiveness of Canada’s air transportation industry

Addressing cost structure would result in an increase in competition in Canada, leading to lower ticket prices and greater air travel.

Lower fees/charges leading to lower and more competitive airfares would increase the demand for international travel to Canada and create economic benefits for the country. A $25 decrease in airfares driven by lower fees/charges would result in an increase of $182 million of GDP and 445,000 additional travellers (including US). As an example, this fare reduction is in line with the differential found in research by the Buffalo Niagara International Airport between fees/charges per passenger at Pearson International Airport and those at the Buffalo airport.

More liberalized air access, which includes opening more routes, would also create more competition and lower airfares in Canada. These changes will help level the playing field for Canada’s air transportation industry, and increase international visitors to Canada. In addition, when new carriers enter a market, their marketing and promotional efforts help to create awareness of new routes and ultimately stimulate travel.
If air policies were liberalized with key source markets that have untapped market potential due to current restrictive air agreements, international arrivals from these destinations (for example: Singapore, Taiwan, Turkey, Thailand and UAE) could increase by 35% or more. This is based on research done by InterVISTAS on the impact of changes in air liberalization policies globally. By 2017, this would result in 66,000 more international arrivals, $105 million more in overall tourism spending, an increase of almost $90 million in GDP and 800 to 1,400 new jobs.

Examples of economic benefits from more liberalized air policies (2015 - 2017)*

15%
1 year post air liberalization (sample source markets include Singapore, Taiwan, Turkey, Thailand, UAE)
- $58M increase in overall tourism spending
- 36,000 incremental increase in arrivals
- 172,000 projected 2017 arrivals
- $49M increase in GDP
- 400 - 800 in new jobs
- $7M increase in federal revenue

25%
1 year post air liberalization (sample source markets include Singapore, Taiwan, Turkey, Thailand, UAE)
- $81M increase in overall tourism spending
- 51,000 incremental increase in arrivals
- 187,000 projected 2017 arrivals
- $69M increase in GDP
- 600 - 1,100 in new jobs
- $10M increase in federal revenue

35%
1 year post air liberalization (sample source markets include Singapore, Taiwan, Turkey, Thailand, UAE)
- $105M increase in overall tourism spending
- 66,000 incremental increase in arrivals
- 202,000 projected 2017 arrivals
- $89M increase in GDP
- 800 - 1,400 in new jobs
- $13M increase in federal revenue

*Growth rate assumptions
- 2014 arrivals derived from applying historical 2012 arrivals growth rate to 2012 arrivals.
- 15%, 25%, 35% in arrivals growth in 2014. 5% in subsequent years.
Marketing Canada as a travel destination

Tourism marketing plays a critical role in increasing awareness of a country, and therefore in attracting travellers. With competition for the global traveller increasing, the role of marketing becomes even more important.

The Canadian Tourism Commission (CTC) 2013 annual report indicates that, based on an advertising evaluation study, its activities and campaigns were responsible for almost 400,000 visits by international travellers in 2013.

The success of Brand USA, an organization that is funded through public and private sources to promote the US as a tourism destination, provides further evidence that marketing can attract international visitors. The intent of Canadians to visit the US increased from 58% to 71% after Brand USA launched a campaign in five priority markets, including Canada.

*Brand USA Fiscal Year 2012 Annual Report*
In Canada, tourism marketing is carried out through the CTC (Federal Crown Corporation), and provincial, regional, city and resort tourism marketing organizations.

In carrying out its work, the CTC collaborates with businesses, players in the international travel trade, meeting and convention professionals, and the governments of Canada, the provinces and the territories. Currently the CTC focuses on promoting Canada in 10 leisure markets around the world, the United Kingdom, Germany, France, Australia, Japan, South Korea, China, India, Mexico and Brazil.

CTC’s base funding has declined in recent years as part of the federal government’s efforts to return to fiscal balance. From a level of almost $100 million in 2001, CTC’s budget has declined to $58 million this year. Event specific funding was provided in some years, for example for the lead up to the Olympics in 2010\textsuperscript{10}.

In contrast, funding for tourism organizations in other countries is increasing. Canada faces the difficult task of increasing tourism with a diminishing marketing budget.

The CTC continues to promote Canada in an exemplary fashion within the constraints of its declining budget. Indeed, Canada has continued, since 2008, to rank either first or second in terms of country brand in terms of FutureBrand’s Country Brand Index. However, the CTC is having to make trade-offs in choosing where to allocate its scarce resources and this is affecting Canada’s competitiveness in the international tourism market. Notably, the CTC has had to divert resources away from the US leisure market due to funding pressures. At the same time, the US has increased its marketing efforts to attract Canadian tourists.

\textsuperscript{10}Canadian Tourism Commission 2012 annual report
Restoring CTC’s funding, adjusted for inflation, and keeping it stable at a higher level, would allow CTC and make strategic investments to optimize international travel to Canada in markets where opportunities are the strongest, such as the US.

Perhaps more importantly, an increase in national funding and therefore marketing will allow many tourism operators to redeploy some of their funds towards other priorities (i.e. investment and expansion of product), which in turn will create a much more efficient structure to market Canada as a travel destination.

---

### Marketing budget changes across select countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Budget (CAD$)*</th>
<th>Budget Growth from previous year</th>
<th>Arrivals growth in key markets 1996-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>$219M</td>
<td>↑</td>
<td>14%</td>
</tr>
<tr>
<td>Mexico</td>
<td>$191M</td>
<td>↑</td>
<td>4%</td>
</tr>
<tr>
<td>Australia</td>
<td>$141M</td>
<td>↑</td>
<td>30%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>$129M</td>
<td>↑</td>
<td>257%</td>
</tr>
<tr>
<td>USA**</td>
<td>$125M</td>
<td>↑</td>
<td>N/A</td>
</tr>
<tr>
<td>NZ</td>
<td>$102M</td>
<td>↑</td>
<td>83%</td>
</tr>
<tr>
<td>Korea</td>
<td>$94M</td>
<td>↑</td>
<td>158%</td>
</tr>
<tr>
<td>S. Africa</td>
<td>$77M</td>
<td>↑</td>
<td>7%</td>
</tr>
<tr>
<td>Canada</td>
<td>$58M</td>
<td>↓</td>
<td>-10%</td>
</tr>
</tbody>
</table>

Source: UNWTO, OECD Trends & Policies 2014, Various National Tourism Organizations’ corporate plans

*Where publicly disclosed. Majority of budgets were for F2013 or F2014.

**Brand USA operating budget. Budget does not include amounts allocated to individual state tourism offices.
The international tourism sector is a fast growing and ever changing landscape. This requires tourism marketers to be innovative and nimble in order to ensure a growing share of the market. Stable funding will allow CTC to build its promotional activities, build and maintain its partnerships, and respond to changes in the marketplace.

It may also be time to consider innovative funding approaches across the public and private sector, with a stable and appropriate level of federal contribution, like that employed for Brand USA. There are also ongoing opportunities for all of Canada’s destination marketers to coordinate and better leverage collective funding across the industry.

Tourism stakeholders would welcome the opportunity to discuss new funding approaches with the government.
Increased marketing awareness in certain source markets would yield substantial positive economic benefits for Canada.

If newly funded CTC marketing resulted in the same increase in US visitors to Canada as the US has enjoyed from Canada thanks to Brand USA marketing efforts – a 6.4% increase – by 2017, this would result in 1.6 million new visitors from the US.

Deloitte analysis shows that the additional spending that would result – $876 million by 2017 – would have direct and indirect impacts resulting in an increase of **$745 million of GDP and 6,400 to 12,000 new jobs** by 2017.

If these newly funded marketing efforts increased visitors from priority markets (UK, France, Germany and Australia) by 5% – the international rate of growth in 2013 – and increased visitors from new markets that have a higher rate of growth of international tourists (Japan, South Korea, Mexico, Brazil, China and India) by 8%, by 2017, this would result in 321,000 new visitors.

Deloitte analysis shows that the additional tourism spending of $481 million that would result would have direct and indirect impacts resulting in an increase of **$409 million of GDP and 3,600 to 6,600 new jobs** by 2017.

The increase in federal revenues of $166 million that would result from these changes would be more than sufficient to fund a return to the CTC funding level of almost $100 million in 2001 (and to adjust this amount for inflation).
Examples of economic benefits from increases in tourism marketing budget (2015-2017)*

**US**
- $876M increase in overall tourism spending
- 1,644,000 incremental increase in arrivals
- 14,409,000 projected 2017 arrivals
- **$745M increase in GDP**
- 6,500 - 12,000 in new jobs
- $107M increase in federal revenue

**Priority Markets**
- $231M increase in overall tourism spending
- 165,000 incremental increase in arrivals
- 1,608,000 projected 2017 arrivals
- **$196M increase in GDP**
- 1,700 - 3,200 in new jobs
- $28M increase in federal revenue

**New Markets**
- $250M increase in overall tourism spending
- 157,000 incremental increase in arrivals
- 1,230,000 projected 2017 arrivals
- **$213M increase in GDP**
- 1,800 - 3,400 in new jobs
- $31M increase in federal revenue

*Growth rate assumptions
- 2014 arrivals derived from applying historical 2012 arrivals growth rate to 2012 arrivals.
- 6.4% in arrivals growth for US in 2014. 3% in subsequent years.
- 5% in arrivals growth for priority markets in 2014. 3% in subsequent years.
- 8% in arrivals growth for new markets in 2014. 3% in subsequent years.
Tourism is an important sector in the Canadian economy, contributing more than $84 billion in economic activity, employing more than 618,000 Canadians and creating important opportunities for international trade. However, while international tourism is growing, Canada’s market share is declining (Canada’s global ranking in international arrivals has dropped from 8th to 17th) – global international arrivals grew by 5% in 2013 while international arrivals into Canada grew at only 1.5% in that year. Canada is one of the few top 20 tourism countries that has actually seen arrivals fall since 2000. There are a number of opportunities for sustained growth that Canada can seize to regain some of this ground.

For Canada to compete in the global marketplace and re-establish itself as a top international tourism destination, there is a need to:

1. Address the barriers associated with visa requirements. As a starting point, the government should eliminate the visa requirements for visitors from Mexico and Brazil, and further reduce the processing burden for visitors from India and China.

2. Reduce fees and charges that are creating an unlevel playing field for the air transportation industry. The industry looks forward to discussing this issue in the context of the Minister of Transport’s consultation process.

3. Negotiate more targeted, open and non-restrictive air agreements to open up more air routes and capacity.

4. Restore the Canadian Tourism Commission’s funding to its 2001 level, adjusted for inflation, and consider alternative funding approaches that could further leverage private sector partner contributions.
These initiatives will have a significant and immediate positive impact on Canada’s economy. They will level the playing field for Canada’s tourism industry and allow Canada to reach the goal of a 7% growth rate in international tourist arrivals. By 2017, this would result in 3.8 million new arrivals, $2.9 billion of additional tourism spending, an increase of $2.5 billion in GDP, and 21,000 to 40,000 new jobs. Over time, this would also result in a $6.1 billion increase in exports.

The projected increase in federal revenues and broader economic impact will offset costs related to reducing visa barriers, returning CTC funding levels to those in 2001, adjusted for inflation, reducing fees and charges that are currently contributing to the high cost structure for airlines in Canada, and liberalizing air agreements.

The opportunities for economic benefits are simply too great to pass up. The government must act now to improve Canada’s competitiveness as a destination for international travel.
Examples of economic benefits from increase in annual arrivals (2015 - 2017)*

- **3%** International arrivals
  - *2013 arrivals growth rate of non-US countries to Canada
  - $1,196M increase in overall tourism spending
  - $1,017M increase in GDP
  - *0.07% increase in Canadian GDP
  - $2,615M increase in exports
  - 9,000 - 16,000 increase in new jobs
  - $146M increase in federal revenue

- **5%** International arrivals
  - *2013 global arrivals growth rate
  - $2,033M increase in overall tourism spending
  - $1,729M increase in GDP
  - *0.11% increase in Canadian GDP
  - $4,358M increase in exports
  - 15,000 - 28,000 increase in new jobs
  - $250M increase in federal revenue

- **7%** International arrivals
  - *Potential goal with all barriers removed
  - $2,902M increase in overall tourism spending
  - $2,469M increase in GDP
  - *0.16% increase in Canadian GDP
  - $6,101M increase in exports
  - 21,000 - 40,000 increase in new jobs
  - $355M increase in federal revenue

*Growth rate assumptions:
- 2014 arrivals derived from applying historical 2012 arrivals growth rate to 2012 arrivals. 3%, 5% or 7% in subsequent years.
# Appendix 1-
Organizations interviewed

<table>
<thead>
<tr>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Canada</td>
</tr>
<tr>
<td>Ambassatours Grayline</td>
</tr>
<tr>
<td>Canadian Tourism Commission</td>
</tr>
<tr>
<td>Hotel Association of Canada</td>
</tr>
<tr>
<td>Jonview</td>
</tr>
<tr>
<td>Le Massif de Charlevoix</td>
</tr>
<tr>
<td>Post Hotel &amp; Spa</td>
</tr>
<tr>
<td>Rocky Mountaineer</td>
</tr>
<tr>
<td>Tourism Australia</td>
</tr>
<tr>
<td>Tourism Industry Association of Canada</td>
</tr>
<tr>
<td>Tourism Whistler</td>
</tr>
<tr>
<td>Vancouver Airport Authority</td>
</tr>
<tr>
<td>WestJet</td>
</tr>
</tbody>
</table>
# Appendix 2 – National Funders

<table>
<thead>
<tr>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alberta Tourism, Parks &amp; Recreation</td>
</tr>
<tr>
<td>Banff Lake Louise Tourism</td>
</tr>
<tr>
<td>B.C. Ministry of Jobs, Tourism &amp; Skills Training</td>
</tr>
<tr>
<td>Canada West Ski Areas Association</td>
</tr>
<tr>
<td>Canadian Ski Council</td>
</tr>
<tr>
<td>Destination British Columbia</td>
</tr>
<tr>
<td>Destination St. John’s (Newfoundland)</td>
</tr>
<tr>
<td>Edmonton International Airport</td>
</tr>
<tr>
<td>Edmonton Tourism</td>
</tr>
<tr>
<td>Fairmont Hotels &amp; Resorts</td>
</tr>
<tr>
<td>Grouse Mountain Resorts Ltd.</td>
</tr>
<tr>
<td>Hotel Association of Canada</td>
</tr>
<tr>
<td>Quebec City Tourism</td>
</tr>
<tr>
<td>Resorts of the Canadian Rockies</td>
</tr>
<tr>
<td>Rocky Mountaineer</td>
</tr>
<tr>
<td>Tourism Big White</td>
</tr>
<tr>
<td>Tourism Kelowna</td>
</tr>
<tr>
<td>Tourism Prince George</td>
</tr>
<tr>
<td>Tourism Saskatoon</td>
</tr>
<tr>
<td>Tourism Sun Peaks</td>
</tr>
<tr>
<td>Tourism Vancouver</td>
</tr>
<tr>
<td>Tourism Victoria</td>
</tr>
<tr>
<td>Tourism Whistler</td>
</tr>
<tr>
<td>Travel Alberta</td>
</tr>
<tr>
<td>Vancouver International Airport</td>
</tr>
</tbody>
</table>
Appendix 3 – Definitions & Assumptions

<table>
<thead>
<tr>
<th>Factors</th>
<th>Definitions &amp; Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>International Arrivals</td>
<td>• Where year-over-year growth is used, growth rate is assumed to be constant.</td>
</tr>
<tr>
<td></td>
<td>• Definition: overnight visits from all international markets.</td>
</tr>
<tr>
<td>Tourism Spending (by source markets)</td>
<td>• Definition: International receipts (Statistics Canada). Includes all expenses incidental to travel in Canada by non-residents.</td>
</tr>
<tr>
<td></td>
<td>• Among these are expenditures in Canada for lodging, food, entertainment, local and intercity transportation and all other purchases of goods and services (including gifts) made by travellers.</td>
</tr>
<tr>
<td>Tourism Spending (overall)</td>
<td>• Calculated by multiplying international arrivals by spend per visitor.</td>
</tr>
<tr>
<td>Spend per visitor</td>
<td>• Average spending per visit of all non-resident overnight travellers to Canada in 2012.</td>
</tr>
<tr>
<td>Base year</td>
<td>• All international arrivals and tourism spending are based on 2012 data.</td>
</tr>
<tr>
<td>GDP multiplier</td>
<td>• 2010 Statistics Canada Input-Output National Multipliers. Simple multipliers (includes direct and indirect effects).</td>
</tr>
<tr>
<td></td>
<td>• GDP multiplier obtained by aggregating GDP basic price multipliers from tourism-related industries. The GDP basic price multiplier was weighted based on the respective weight of the individual industries’ GDP as a part of overall tourism GDP.</td>
</tr>
<tr>
<td>Jobs multiplier</td>
<td>• 2010 Statistics Canada Input-Output National Multipliers. Simple multipliers (includes direct and indirect effects).</td>
</tr>
<tr>
<td></td>
<td>• Jobs multiplier obtained by aggregating jobs multipliers from tourism-related industries. The job multiplier was weighted based on the respective weight of the individual industries’ GDP as a part of overall tourism GDP.</td>
</tr>
<tr>
<td>Changes in GDP</td>
<td>• Calculated by multiplying GDP multiplier by tourism spending for specific source market.</td>
</tr>
<tr>
<td>Changes in jobs</td>
<td>• Calculated by dividing tourism spending for specific source market by amount of spend required to create a new job.</td>
</tr>
<tr>
<td>Amount of spend required to create a new job</td>
<td>• Calculated by taking total tourism demand and dividing by the total employment attributable to tourism (Statistics Canada).</td>
</tr>
<tr>
<td>Changes in federal revenue</td>
<td>• Calculated by multiplying federal revenue (Statistics Canada, Government revenue attributable to tourism) raised with tourism spending for specific source market.</td>
</tr>
<tr>
<td>Changes in overall exports</td>
<td>• Calculated based on assumptions listed in Deloitte’s ‘Passport to Growth’ paper.</td>
</tr>
<tr>
<td></td>
<td>• For detailed methodology, please refer to ‘Deloitte Tourism &amp; Trade Study – Technical Appendix’.</td>
</tr>
</tbody>
</table>