DESTINATIONS INTERNATIONAL
CANADIAN DESTINATION LEADERSHIP COUNCIL

FREQUENTLY ASKED QUESTIONS



ANTICIPATED QUESTIONS ABOUT THE IMPACT OF THE VISITOR ECONOMY ON CANADIAN EXPORTS STUDY

ABOUT THE STUDY

Who conducted this study, and who paid for it?

EY-Parthenon conducted the analysis and wrote the narrative. Destinations International commissioned the work in partnership with the Canadian Destination Leadership Council (CDLC), with financial support from the Destinations International Foundation and contributions from DI's members. EY-Parthenon's role was independent: they designed the methodology, ran the analysis, and authored the technical report.

What is the headline finding in one sentence?

A 1% increase in non-resident visits to Canada from a country is associated with approximately **$1.06 billion in additional Canadian exports** to that country, measured over a two-year horizon. This is on top of tourism's direct contribution as a service export.

What time period and countries does the analysis cover?

The analysis covers 24 countries that together account for over 95% of Canada's total exports: Australia, Belgium, Brazil, China, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Mexico, Netherlands, Norway, Russian Federation, Saudi Arabia, Singapore, South Korea, Spain, Switzerland, Taiwan, Turkey, United Kingdom, and United States. EY-Parthenon analyzed data from Q1 2002 to Q2 2025.

What does "non-tourism services exports" mean in the headline finding?

The $1.06B figure measures the impact on goods exports plus services exports that are NOT tourism. Tourism's own direct value as a service export is on top of this. The point of measuring it this way is to isolate the broader trade-enabling effect of inbound visitation, beyond the tourism revenue itself.

METHODOLOGY AND CREDIBILITY

Is this just correlation, or does it actually show causation?

The study takes specific steps to support a causal interpretation. The Fixed Effects panel regression controls for country-specific factors that don't change over time (geography, language, trade history) and for global shocks that affect all countries together. EY-Parthenon also ran a Granger causality test, which specifically asks whether tourism leads exports in time— and confirms that it does. Multiple alternative model specifications produced consistent results. This is the same evidentiary framework economists use to evaluate trade and tourism research in other industries.

How does this compare to the 2013 Deloitte "Passport to Growth" study?

Deloitte's 2013 study used the same fundamental approach (panel data econometrics) and reached the same qualitative conclusion: international visitation drives Canadian export growth. Deloitte's headline number was $817M per 1% lift in inbound tourism. EY-Parthenon's 2026 estimate is $1.06B for the same lift. The difference reflects three things: more recent data (2002–2025 vs. Deloitte's earlier window), a larger and more diversified Canadian export base, and updated methodology. The two studies are complementary, not contradictory.

Why a two-year horizon? Why not measure the same year?

Tourism's effect on trade isn't immediate. Business relationships, supply contracts, and repeat purchasing decisions take time to develop. A visit in year one might lead to a procurement conversation in year two, then a multi-year contract signed in year three. The two-year window captures both immediate and delayed effects, giving a more complete picture of how visitation translates to trade.

APPLYING THE FINDINGS TO MY DESTINATION

Does this apply to my specific destination?

Yes, but in different ways depending on your destination's profile. The four mechanisms in the report (trade corridors, business events, trade diversification, national brand) apply to every Canadian destination, though the dominant mechanism varies. A major air hub city may see the strongest air-cargo effects. An inland city with major convention infrastructure may see the strongest business-events effects. A region that markets to a specific international audience may see the strongest brand and diversification effects

Can I use the $1.06B number for my city or region specifically?

No. The $1.06B is a national-level estimate based on Canada's overall trade with 24 countries. It cannot be subdivided to a single province, city, or region. What you can do at the local level: identify the export industries in your region that depend on air connectivity, business events, or international relationships; document local examples in the same spirit as the Cape Breton, Edmonton, and Victoria case studies; and frame your work as the local expression of the national pattern the study describes.

What if a stakeholder asks whether AI or remote work has reduced the value of in-person visits?

Poole (2010), one of the foundational studies in the literature, found that face-to-face business travel has the strongest effect on differentiated goods, exactly the categories where trust, judgment, and relationships matter most. The study's stakeholder interviews reinforce this: business events function as "reverse trade missions" because they bring buyers and investors physically into Canada in ways that virtual engagement cannot replicate.

SOURCES, CITATIONS, AND RELATED RESEARCH

Where can I cite the study, and how should I cite it?

Cite as: EY-Parthenon (Ernst & Young LLP), *The Impact of the Visitor Economy on Canadian Exports*, prepared for Destinations International, February 2026.

Where can I access the study?

The study is available from Destinations International at https://destinationsinternational.org/impact-visitor-economy-canadian-exports.