

2026 US Consumer Study

Final Report

March 2026

Prepared for:



This project has been made possible through funding provided by the Atlantic Canada Agreement on Tourism (ACAT). ACAT is a nine-member pan-Atlantic initiative comprised of the Atlantic Canada Opportunities Agency, the four Atlantic Canada Tourism Industry Associations, and the four Provincial Departments responsible for tourism.



NARRATIVE
RESEARCH



Background & Purpose



Background & Research Objectives

The past year has marked a period of considerable change for the tourism industry, particularly within North America, creating both challenges and opportunities for Canadian destinations, including Atlantic Canada. In the United States, the inbound tourism market is facing challenges due to a decline in international visitation and spending. This has resulted in a growing push to increase domestic tourism within the United States through state-level outreach and cross-state promotions.

While affected, US outbound tourism has remained relatively strong to date, with Americans continuing to travel internationally despite economic pressures. That said, higher travel costs due to inflation and tariffs, political concerns, competition from other destinations, shifting travel patterns, and border-related issues (e.g., reports of enhanced screening and stricter enforcement of entry requirements) highlight the critical need for Atlantic Canadian tourism partners to have timely, data-driven research to guide their upcoming marketing strategies.

With this in mind, the Tourism Industry Association of Prince Edward Island (TIAPEI), through the Atlantic Canada Agreement on Tourism (ACAT), commissioned Narrative Research to once again undertake quantitative research with Americans living in the Mid-Atlantic and New England regions. The goal was to better understand these travellers' current mindset regarding travel intentions, choices, and behaviours; assess visitor market potential from each of these regions; and identify the factors that may influence destination choice moving forward. More specific research objectives included:

- Assess awareness of each Atlantic province;
- Understand familiarity with each Atlantic province;
- Assess intent to visit Canada;
- Identify which provinces travellers are most likely to visit on a future trip;
- Assess past visitation to Canada and each Atlantic province;
- Understand barriers to visiting each Atlantic province;
- Identify motivations for visiting each Atlantic province;
- Assess general ad recall/ad awareness; and
- Assess the impact of the current geopolitical landscape on perceptions of, and current or planned travel to, Atlantic Canada.





Methodology



Overview

To meet the study objectives, an online survey was conducted with members of a general population online panel. A total of 2,418 travellers from the Mid-Atlantic (New York, New Jersey, and Pennsylvania) and New England (Maine, Massachusetts, New Hampshire, Connecticut, Vermont, and Rhode Island) regions took part in the study. To qualify, all participants were required to hold a valid passport and:

- Have taken at least one vacation trip of at least two nights outside their home state during the past three years (with at **least 1 night spent in a paid accommodation**); or
- Have definite plans to take such a trip over the next year.

Overall, 96% of those who completed the survey have taken a recent trip, and 4% have definite plans to take such a trip soon. Soft quotas were put in place for age, gender, and region for the 2026 study, and the data is weighted by age, gender, and region.

The survey was based on ACAT’s 2024 US Consumer Survey design, with several revisions made in consultation with the ACAT research team. Data collection was completed over two and a half weeks, during a period of trade disputes between the two countries.

The following presents a summary of results. A detailed set of data tables is also provided, including results broken down for each question by region (i.e., Mid-Atlantic and New England) and key demographics.

Note: Given that the online survey is a non-probability sample, a margin of error is not applied to results.



Mode: Online survey



Audience: Travellers from the *Mid-Atlantic* and *New England* regions of the United States



Completes: 2,418 travellers
(*Mid-Atlantic: 1,209 & New England: 1,209*)



Data Collection Dates:
January 8-25, 2026



Average Completion Time:
10.8 minutes





Study Highlights

Recent Travel Activities & Regional Awareness

A strong proportion of US travellers are aware of each Atlantic Canada province, with Nova Scotia being the most recognized and familiar province in the region.

- On average, US travellers have taken 5.0 separate trips in the past three years, consistent with findings from 2024. However, reported travel within the US has increased notably, while recent visitation to Canada has declined significantly. Among those who have taken recent trips, one-quarter report having visited Canada – down from nearly one-half in 2024.
- In terms of awareness, results show year-over-year growth in awareness for most provinces, including all Atlantic Canada provinces, with the strongest increases in Nova Scotia and Prince Edward Island. Consistent with historical results, Nova Scotia is the Atlantic Canada province US travellers are most aware of. In terms of familiarity with what there is to do and see in each province, at least one-half of travellers who are aware are familiar with each Atlantic Canada province, with the highest familiarity levels seen for Nova Scotia.

Travel Intentions

The proportion of US travellers in the ‘active planning’ stage in for visiting Canada has declined sharply since 2024. That said, most are open to the idea.

- Currently, one-quarter of US travellers say they are ‘actively planning’ a trip to Canada, with very few having already booked or currently making arrangements. That said, more than one-half of travellers in the key markets of New England and the Mid-Atlantic are open to visiting Canada for vacation in the next couple of years. This suggests that continued investment in engagement and promotion in these markets is worthwhile, despite short- to medium-term challenges.
- Among those who would consider a future trip to Canada, the provinces of Ontario and Quebec are most appealing. For Atlantic Canada specifically, travellers from New England show stronger interest in visiting the region than those from the Mid-Atlantic, especially when it comes to visiting Nova Scotia.
- Among those who are likely to consider Canada as a vacation destination, one-third say they would like to visit all four Atlantic provinces. Those who are unlikely to visit or will not consider Canada as a destination most commonly attribute this to a lack of familiarity, followed by a lack of personal desire, a preference for other destinations, or distance.
- The vast majority of US travellers (81%) place importance on having a direct flight option when considering an Atlantic Canada vacation, with Mid-Atlantic travellers being most likely to place importance on this factor.
- Consistent with past findings, the planning cycle for an Atlantic Canadian vacation typically falls within a one-to-six-month window, while US travellers tend to book within roughly three months of their travel date. Overall, potential travellers rely on a wide range of information sources for planning purposes, with destination websites, travel websites, and online review sites serving as key tools.





Study Highlights - *Continued*

Ad Recall

Exposure to Atlantic Canada tourism advertising is modest.

- One-half of US travellers recall having recently seen advertising for Canadian tourism, while two in ten recall ads for Atlantic Canada. More specifically, within the region recall is highest for Nova Scotia (29%), followed by Prince Edward Island (22%), New Brunswick (17%), and Newfoundland & Labrador (15%). Across US markets, recall of Atlantic Canada travel advertising is generally consistent, both overall and for each province, with one exception. New England travellers are notably more likely than Mid-Atlantic travellers to report having seen Nova Scotia ads.

US/Canada Travel

Intentions to visit Canada within the next two years are modest, and down notably from 2024. However, openness to visiting is high, reinforcing the importance of sustained market presence.

- As mentioned, despite a reported decline in recent visitation to Canada, with just one-quarter actively planning such a vacation, most US travellers in the Mid-Atlantic and New England markets appear open to the idea of travelling to Canada. Indeed, six in ten are seriously considering or dreaming of visiting Canada.
- The vast majority of US travellers hold positive impressions of Canada and consider it an appealing vacation destination. That said, awareness of the current US-Canada geopolitical situation is high, and travellers overall are equally as likely to view the relationship between the two countries positively as negatively. New England travellers, however, are more likely to describe the current relationship as negative than positive. Despite a net negative perception of the relationship between Canada and the US, findings suggest that this has not translated into negative perceptions of Canada as a vacation destination. In fact, the current geopolitical environment was not identified, unaided, as a barrier to travel to Canada.
- ***US travellers hold overwhelmingly positive views of Canada, however, perceptions of how travel to Canada has changed in recent years are mixed, and many express concerns.*** Notable proportions of US travellers express concerns about rising costs, reduced welcome, increased border difficulty, and safety. Despite these concerns, most US travellers indicate that their own travel plans to Canada have not changed over the past year because of the current situation.

An infographic summary of research results is presented on the following page.





ACAT – 2026 US Consumer Study

Key Highlights

Methodology: 2,418 online surveys with US travellers living in the Mid-Atlantic and New England States.
Data Collection: January 8-25, 2026.

Recent Travel Activity



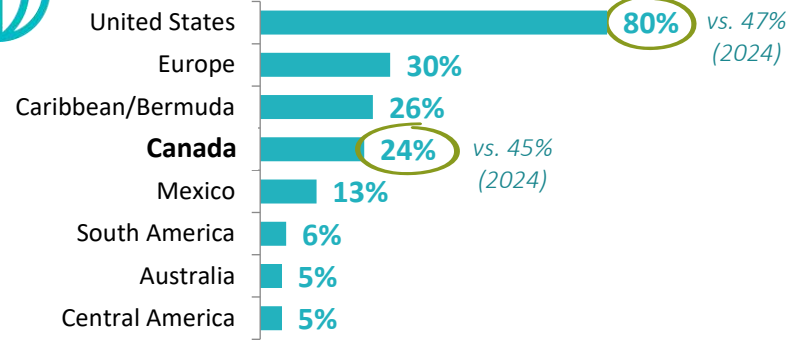
On average, US travellers took

5

trips in recent years



Top Destinations Travelled in Recent Years



Awareness & Familiarity



NS

Aware



NB

Aware



PEI

Aware



NL

Aware

61%

49%

48%

44%

Of those aware, what % are familiar with what there is to see and do in that province?



Familiar

65%

Familiar

48%

Familiar

55%

Familiar

49%

Perceptions of US-Canada Travel & Geopolitical Situation



89% have positive impressions of Canada as a place to visit



91% consider Canada an appealing vacation destination right now



86% are aware of the current US-Canada geopolitical situation



50% believe travelling to Canada has become more expensive



46% believe Americans are now generally less welcomed by Canadians



43% believe it has become more difficult for Americans to cross the US-Canada border



25% consider Canada less safe than it has been in the past for American visitors



Current US-Canada Relationship

Is as likely to be described as positive as negative

30%



31%

Although perceptions are more negative in New England (24% vs. 37%)

Future Travel Considerations



70%



of US travellers are likely to consider travel to **at least one** Atlantic Canada province in the next 2 years (vs. 79% in 2024)

24%

Of US travellers are 'actively planning' a trip to Canada (vs. 42% in 2024)



% Likely to Visit Atlantic Provinces as Part of a Canadian Vacation Among Those Open to Taking a Canadian Trip

81%



Place importance on having a **direct flight option** when considering an Atlantic Canada vacation

25%



13%



9%



9%





Key Considerations

Results from the **2026 US Consumer Study** suggest that, as ACAT evaluates American vacation travel to Atlantic Canada, the following considerations should guide decision-making.

- **US travel patterns have shifted, at least in the near term.** More US travellers are choosing to vacation within the United States, and fewer have taken recent trips to Canada. That said, interest in Canada and Atlantic Canada remains favourable. One-quarter of US travellers are actively planning a trip to Canada, a notable decline from 2024. Still, six in ten are either seriously considering or dreaming about a trip to Canada, an increase from 2024, which reinforces the importance of maintaining a strong market presence.
- **Concerns about feeling welcome, as well as issues related to safety, border crossing, and cost, may continue to affect travel to Canada and Atlantic Canada.** Clear, positive messaging that highlights value, safety, ease of access, and traveller welcome can help mitigate these concerns and encourage future trips. In addition, reinforcing Atlantic Canada's unique offerings and value proposition may help address underlying hesitations.
- **Despite near-term travel impacts and concerns, there remains a strong opportunity to maintain visibility and remain top-of-mind with US travellers.** Overall awareness and familiarity with Atlantic Canada is moderate and varies by province. Lack of familiarity is the most frequently cited barrier to visitation. Elevating the region's profile and highlighting the experiences and attributes that most strongly motivate destination choice represent key opportunities. Strengthening regional awareness, improving direct air access, and enhancing online trip-planning resources will be important for meeting US traveller expectations and increasing consideration of Atlantic Canada as a vacation destination.
- **Air access is critical.** Direct flight access is highly important to most US travellers when considering a trip to Atlantic Canada, especially those from the Mid-Atlantic region. This likely helps explain the stronger visitation intentions and higher past visitation to Nova Scotia from these key US markets, as it is currently the only Atlantic province offering direct air service from the United States. Expanding air access will be essential to meeting traveller needs, particularly for those interested in exploring multiple provinces within the region.





Travel Activities

The following section provides an overview of respondents' recent travel activities, specifically in relation to pleasure trips of 2 or more nights, where at least 1 night is spent in paid accommodations.



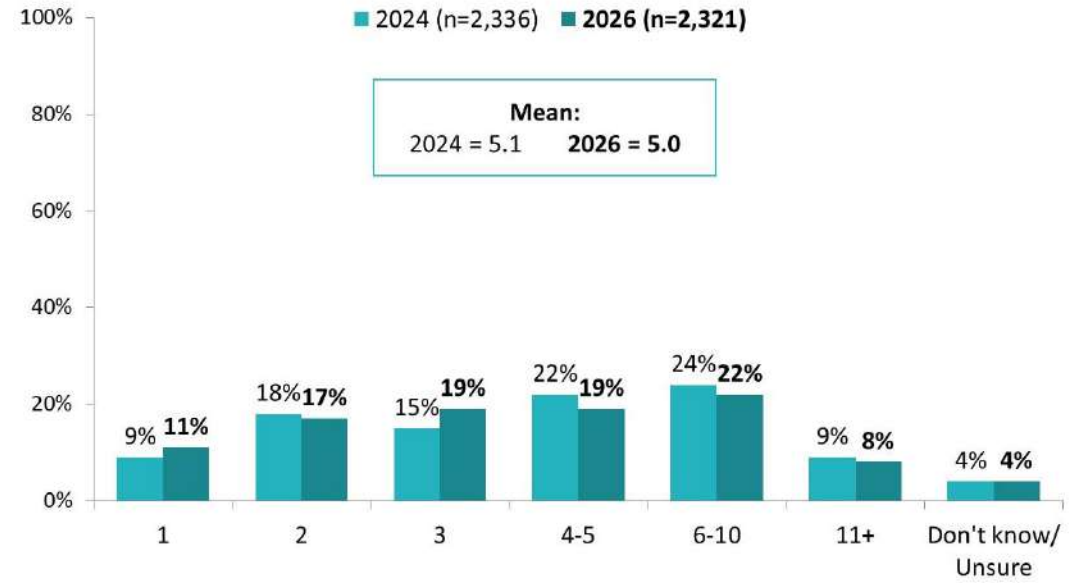
Recent Out of State Vacation

On average, travellers surveyed took 5.0 separate trips in the past three years.

As per screening criteria, all survey respondents hold a valid passport and have either taken at least one vacation trip outside their home state within the past three years or have definite plans to do so over the next year. Once given a clear definition of a vacation trip, virtually all US travellers (96%; unchanged since 2024) report having taken a vacation trip in the past three years while the remaining respondents express *definite* intentions to take such a trip in the coming year. (Tables 5 & 7)

- Among those who recently travelled, the number of vacation trips taken ranges from one to eleven or more, with the number of trips varying across demographics. Consistent with 2024 findings, travellers report taking an average of **five trips** in the past three years.
- Consistent with previous findings, across key demographics, US travellers with higher household incomes and higher levels of education are more likely than their respective counterparts to report a greater number of recent trips. (Table 6)

Number of Separate Recent Trips



Q.6: [IF HAVE TAKEN A RECENT OUT-OF-TOWN VACATION; 'YES' IN Q.5] How many separate out of state vacation trips have you taken in the past 3 years (again, thinking of those pleasure trips of 2 or more nights, where at least 1 night was spent in paid accommodations)?

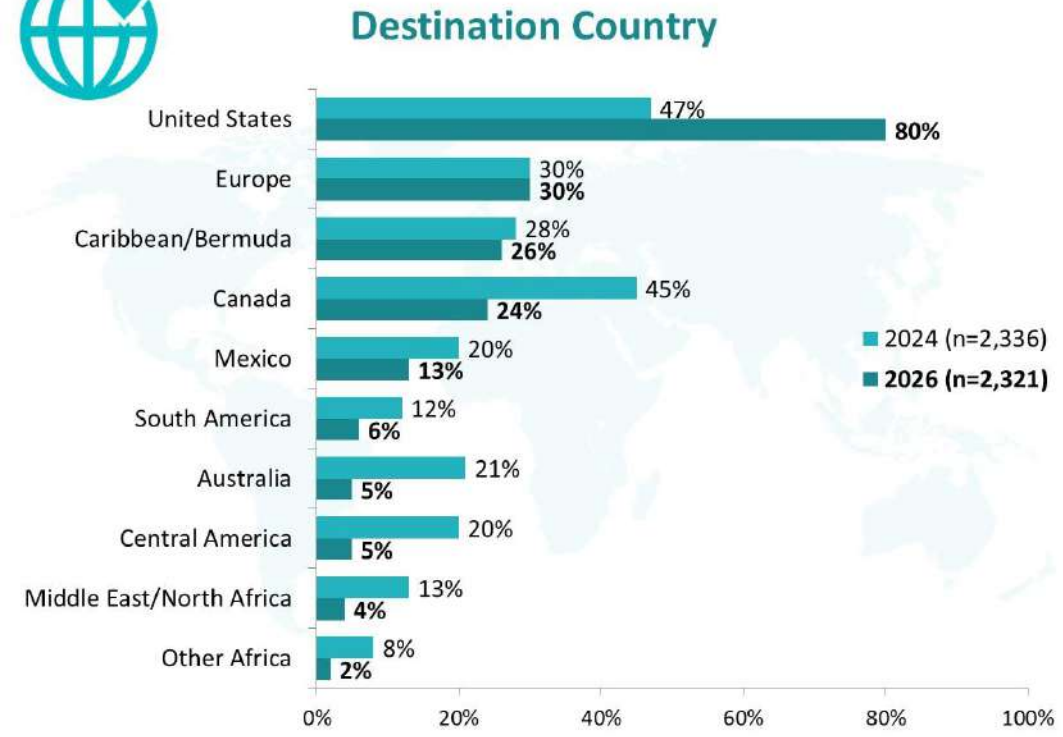


Destination Country of Recent Travellers

Travel within the US has experienced strong growth in recent years, while significantly fewer US travellers have travelled to Canada.

Those who travelled out of state for pleasure for two or more nights within the past three years (including at least one night in paid accommodations) were asked which destinations they had visited.

- Eight in ten recent travellers took a recent out-of-state pleasure trip within the US, representing a significant increase over 2024. Reports of travel within the US increase with both age and household income and are consistent across both markets.
- In contrast, travel to Canada has decreased notably, with only one-quarter stating they have taken a recent pleasure trip there. Of note, this level of decline exceeds the figures reported by Statistics Canada for overall US travel to Canada in recent years.
- Reflecting a change year-over-year, the likelihood of travelling to Canada is now consistent across both Mid-Atlantic and New England markets. This reflects a notable shift over previous year’s results, when New England residents were significantly more likely than Mid-Atlantic residents to travel to Canada.
- Reported travel to Mexico has also declined since 2024, albeit to a lesser extent, with just over one in ten travellers having made a trip to that destination.
- Meanwhile, visitation to Europe and the Caribbean/Bermuda has remained relatively stable since 2024, making these locations marginally more popular than Canada.
- US travellers with higher household incomes are more likely than their less affluent counterparts to report having travelled to Europe and are slightly more likely to report having travelled to Canada. (Table 9)



Q.9: [IF HAVE TAKEN A RECENT OUT-OF-TOWN VACATION, 'YES' IN Q.5] Now we would like you to consider the vacation trips for pleasure purposes that you have taken in recent years. Again, please think for a moment about all of the out of state pleasure trips of 2 or more nights you have taken in the past 3 years where you spent at least 1 night in paid accommodations. What destinations did you visit on these trips?

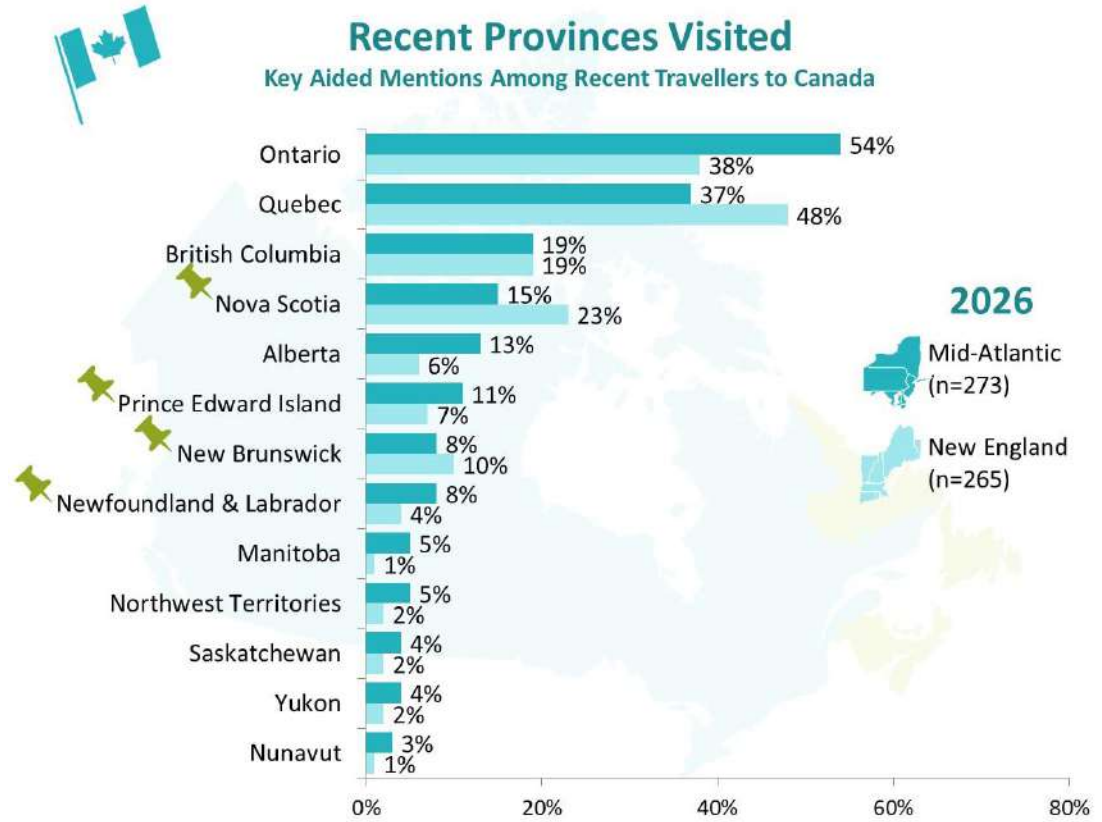


Recent Canadian Travel Destinations

US travellers who have recently visited Canada are most likely to have visited Ontario and Quebec. However, visitation patterns across Canadian provinces differ notably between travellers from the Mid-Atlantic and New England regions.

Travellers who recently visited Canada were asked to specify the provinces or territories they visited.

- Overall, US travellers most commonly report having travelled to **Ontario** and **Quebec** in the past three years. Visitation to **Ontario** is highest among Mid-Atlantic travellers, while travel to **Quebec** is highest among New England travellers.
- As may be expected, visitation to Atlantic Canada varies across the two markets. New England travellers are more likely than Mid-Atlantic travellers to have visited **Nova Scotia**. Conversely, Mid-Atlantic travellers are marginally more likely to report recent visits to **Prince Edward Island** and **Newfoundland & Labrador**, while visitation to **New Brunswick** is nearly equal between the two markets. (Table 10)



	Mid-Atlantic (n=273)	New England (n=265)
2026 Sample size (n)	n=273	n=265
NS	15%	23%
PEI	11%	7%
NB	8%	10%
NL	8%	4%

Q.10: [IF 'CANADA' IN Q.9] Which Canadian provinces/territories have you visited on a pleasure trip of 2 or more nights in the past 3 years?



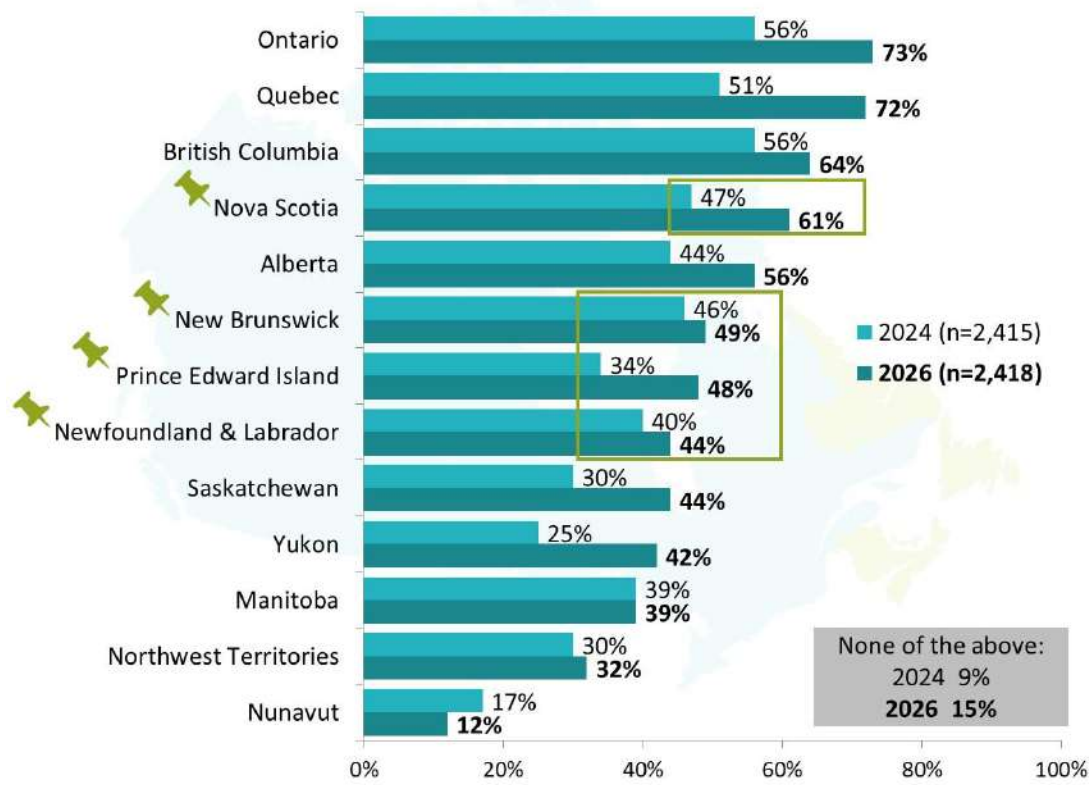
Awareness of Provinces/Territories Overall

Looking at the US travellers' market overall, awareness is strongest for Ontario and Quebec. At the same time, many US travellers are aware of each Atlantic Canadian province.

The following provides a summary of total awareness among the US traveller market.

- **Ontario** and **Quebec** have the highest levels of awareness (visited/heard of) overall, with nearly three-quarters of US travellers aware of each province, followed by **British Columbia** and **Nova Scotia**, with just under two-thirds of travellers being aware of each province.
- Just over one-half of travellers are currently aware of **Alberta**, while marginally fewer are aware of **New Brunswick** and **Prince Edward Island**. More than four in ten are aware of **Newfoundland & Labrador**, while similar proportions are aware of **Saskatchewan**, **Yukon**, and **Manitoba**.
- One-third of travellers are aware of the **Northwest Territories**, while only one in ten are aware of **Nunavut**.
- Overall, the results show year-over-year growth in awareness for most provinces, including all Atlantic Canada provinces, with the strongest increases in **Nova Scotia** and **Prince Edward Island** within the region. (Table 10/11)

Awareness of Provinces Among US Travellers



Q.10/Q.11: [FULL BASE] [Which Canadian provinces/territories have you visited on a pleasure trip of 2 or more nights in the past 3 years?] / [Outside of the provinces/territories you have recently visited, which other Canadian provinces and territories, if any, have you heard of prior to this survey?] / [Which Canadian provinces and territories, if any, have you heard of prior to this survey?] This could include provinces/territories that you have visited MORE than 3 years ago.



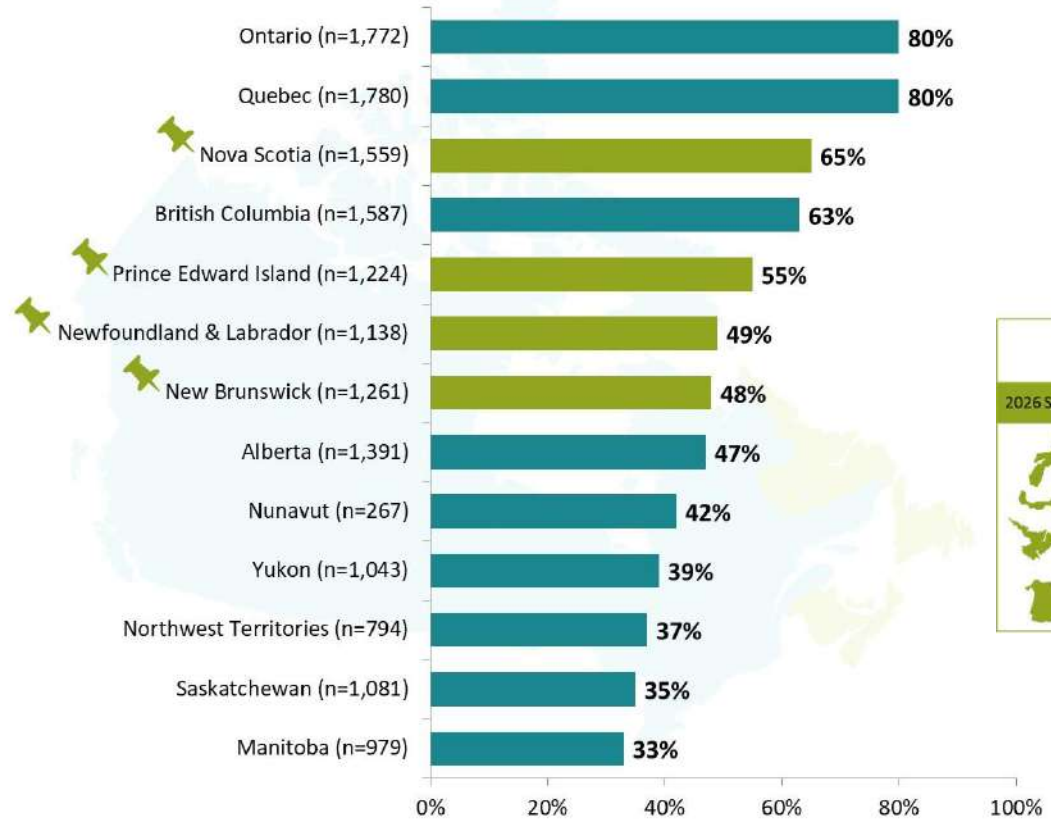
Familiarity of Provinces/Territories

Among those aware of the various provinces, familiarity is strongest for Ontario and Quebec. Across the Atlantic provinces, familiarity is highest for Nova Scotia.

The following provides a summary of familiarity among the US traveller market who are already aware of each given province (n=267-1,780).

- Overall, familiarity is highest for **Ontario** and **Quebec**, with at least eight in ten aware travellers familiar with what there is to see and do in each province. About two-thirds of US travellers aware of **Nova Scotia** are familiar with its offerings. At the same time, just over one-half of those aware of **Prince Edward Island** are familiar with what there is to see and do while vacationing on the Island. Slightly fewer travellers aware of **Newfoundland & Labrador** and **New Brunswick** report similar familiarity with each province.
- As would be expected, recent visitors to Atlantic Canada are notably more likely than non-recent visitors to report familiarity with what there is to see and do in the region.
- Across US markets (among those aware), New England travellers are more likely than Mid-Atlantic travellers to report familiarity with each Atlantic province, with the exception of **Newfoundland & Labrador**, where both markets report equal levels of familiarity. (Table 12)

Familiarity of Provinces Among Travellers Aware of Each Province



Familiarity of AC Provinces By Market

	Mid-Atlantic	New England
2026 Sample size (n)	n=580-775	n=558-784
NS	62%	72%
PEI	53%	61%
NL	49%	50%
NB	46%	54%

Q.12: [AMONG THOSE AWARE; IF VISITED PROVINCES OR HEARD OF IN Q.10/Q.11, EXCLUDING THOSE WHO SAID 'NONE OF THE ABOVE' IN Q.11] How familiar are you with what there is to see and do in [this/these] provinces/territories while on vacation?



Awareness & Familiarity Overview: Atlantic Canada

Again, a strong proportion of US travellers are aware of each Atlantic Canada province, with Nova Scotia being the most recognized and familiar province in the region.

The following provides a recap of awareness and familiarity for each Atlantic Canadian province.

- As previously noted, awareness of each Atlantic Canada province varies between 44% and 61%. Both awareness and familiarity are highest for Nova Scotia. Two-thirds of US travellers aware of Nova Scotia report being familiar with what there is to see and do while on vacation in the province.
- Across the other Atlantic Canada provinces, approximately one-half of US travellers who are aware of each province also report being familiar with what there is to see and do there.

Awareness & Familiarity

Province	Aware	Aware	Aware	Aware			
NS	61%	NB	49%	PEI	48%	NL	44%
Of those aware, what % are familiar with what there is to see and do in that province?							
Familiar	65%	Familiar	48%	Familiar	55%	Familiar	49%



Recent Traveller Profile



The following provides a brief profile of recent visitors to each of the four Atlantic Canada provinces, offering insights into those who recently visited each province and how travel levels vary.

- As shown below, travel levels differ across destinations, with recent visitors to **Newfoundland & Labrador** most likely to report a greater number of out-of-state trips in the past three years. *(Note: small sample sizes)*



Recently Visited NB
(n=47)*

Avg. # of Trips Recently Taken	6.6	Gender	
		Man	67%
		Woman	33%
% Recently Travelled to Other Atl. Prov.		Age	
NS	50%	18-34	34%
PEI	28%	35-54	23%
NL	25%	55-75	44%



Recently Visited NL
(n=28)*

Avg. # of Trips Recently Taken	9.0	Gender	
		Man	63%
		Woman	37%
% Recently Travelled to Other Atl. Prov.		Age	
NS	68%	18-34	33%
PEI	37%	35-54	30%
NB	31%	55-75	37%



Recently Visited PEI
(n=47)*

Avg. # of Trips Recently Taken	7.6	Gender	
		Man	58%
		Woman	42%
% Recently Travelled to Other Atl. Prov.		Age	
NS	50%	18-34	32%
NL	25%	35-54	30%
NB	24%	55-75	38%



Recently Visited NS
(n=101)

Avg. # of Trips Recently Taken	7.0	Gender	
		Man	63%
		Woman	37%
% Recently Travelled to Other Atl. Prov.		Age	
PEI	29%	18-34	37%
NL	26%	35-54	20%
NB	25%	55-75	43%



*Caution: Small sample size.



Travel Intentions

The following section provides an overview of respondents' future travel intentions for pleasure purposes, including considerations of Atlantic Canada.

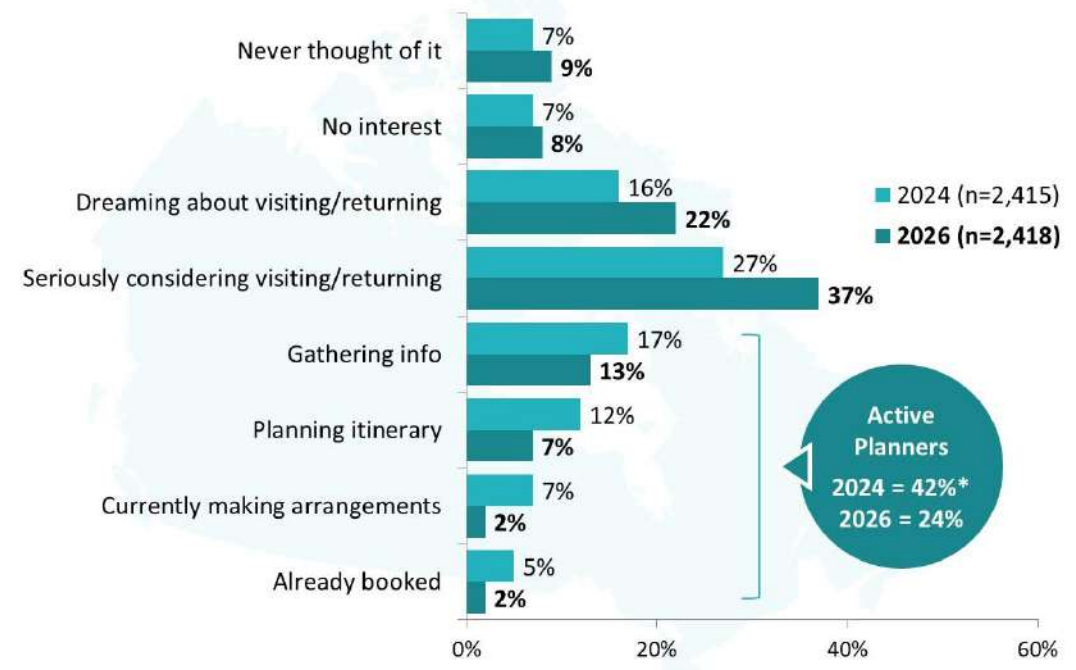


Intentions to Visit Canada

Intentions to visit Canada within the next two years are modest and have declined notably from 2024. However, openness to visiting is high, reinforcing the importance of a sustained market presence.

- Overall, one-quarter of US travellers are currently in the ‘active planning’ stage for a trip to Canada over the next two years, **gathering info, planning their itinerary, making arrangements**, or having **already booked** a trip. Levels of active planning are generally consistent across the two markets.
- While the proportion of ‘active planners’ to Canada has declined notably since 2024, a majority of travellers are open to the idea of visiting. Six in ten state they are either **seriously considering visiting or returning to Canada** or are **dreaming of taking such a trip**. This is up considerably from 2024, underscoring the need to maintain visibility in these markets.
- Consistent with past results, fewer than two in ten travellers have either **never thought of Canada as a vacation spot** or **have no interest** in Canada as a destination.
- Of note, older travellers (i.e., those aged 55-75) are less likely than their younger counterparts to be active planners. (Table 13)

Intentions to Visit Canada in Next 2 Years



Q.13: Which statement best describes your intentions to visit Canada for a pleasure trip of 2 or more nights in the next 2 years?
*Due to rounding.

* Due to rounding





Provinces Likely to Visit

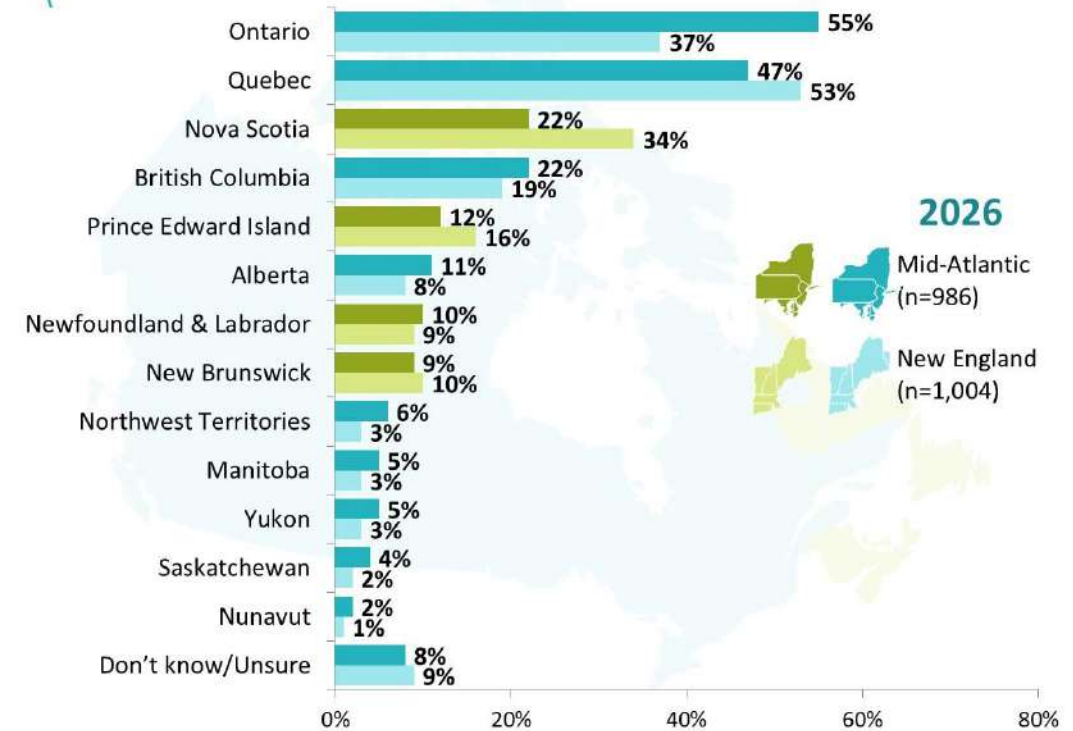
Ontario and Quebec continue to be the top intended Canadian destinations for US travellers, while New England travellers show comparatively stronger interest in visiting Atlantic Canada, specifically Nova Scotia.

US travellers who intend to visit Canada in the next two years, or who are interested in Canada as a travel destination, were asked which province or territory they would visit. Note, this excluded travellers who indicated they had never thought of visiting Canada or were not interested.

- Among both Mid-Atlantic and New England travellers, **Ontario** and **Quebec** are the provinces most-commonly mentioned as intended Canadian destinations over the next two years, albeit to varying degrees. Mid-Atlantic travellers are notably more likely to express intentions to visit **Ontario**, while New England travellers are slightly more likely to intend to visit **Quebec**.
- Within Atlantic Canada, New England travellers are more likely than Mid-Atlantic travellers to report intentions to visit **Nova Scotia** and are marginally more likely to express interest in visiting **Prince Edward Island**. Notably, among New England travellers, similar proportions indicate intentions to visit **Ontario** and **Nova Scotia**.
- Across demographics, a few differences warrant mention. Intentions to visit **Nova Scotia** and **Prince Edward Island** increase with age, while intentions to visit **New Brunswick** decrease slightly with age. (Table 14)



Provinces Likely to Visit in Next 2 Years



Q.14: [IF INTENDING TO VISIT IN Q.13] Which Canadian provinces/territories are you likely to visit in the next 2 years?



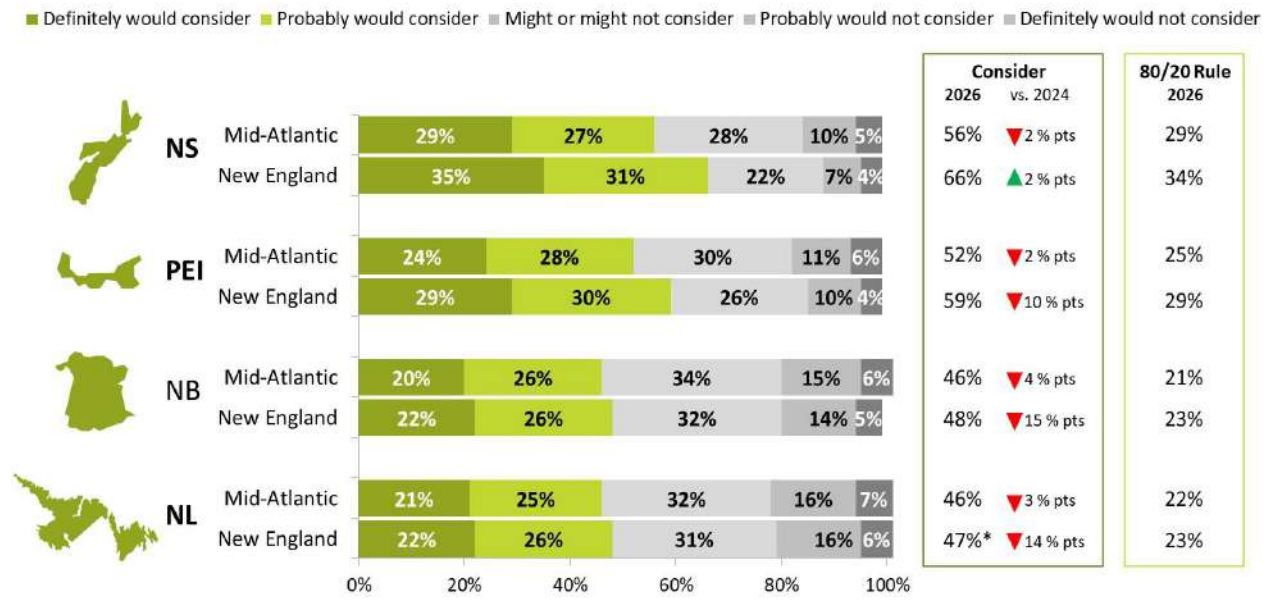
Consideration of Specific Atlantic Canadian Travel Destinations

New England travellers are more inclined than Mid-Atlantic travellers to consider a trip to any Atlantic province, with the majority stating they would consider each province as a vacation destination in the next two years.

All respondents were then asked how likely they would be to consider each Atlantic province as a vacation destination.

- Overall, when it comes to Atlantic Canada, US travellers are most likely to consider **Nova Scotia** as a vacation destination, followed by **Prince Edward Island**. That said, New England travellers are more likely than Mid-Atlantic travellers to say they would 'definitely' or 'probably' consider visiting **Nova Scotia** and **Prince Edward Island**, with differences of at least seven points are evident.
- Intentions to visit **New Brunswick** and **Newfoundland & Labrador** in the near future are consistent across markets, with just under one-half of US travellers indicating they would consider each province.
- Of note, across markets, likelihood of considering each Atlantic province as a vacation destination is down year-over-year, with the exception of travel to **Nova Scotia**, where New England travellers are slightly more likely to consider visiting.
- Inclination to consider an Atlantic Canadian province varies somewhat across demographics. Younger travellers and those with children in the home are more likely than their respective counterparts to consider each of the four provinces. Recent visitors to the region are also more likely than non-recent visitors to say that they would consider a trip to each Atlantic province over the next two years. (Tables 15a-d)

Likely to Consider Each Vacation Destination in the Next 2 Years



Q.15a-d: When thinking of your travel plans over the next 2 years, how likely are you to consider each of the following destinations as part of a vacation trip of 2 or more nights away from home, where at least 1 night is spent in paid accommodations? (Again, this excludes any travel that would be solely for business purposes, trips to your own cottage, and trips for personal reasons such as attending a wedding/funeral, for medical reasons, etc.). (2024: Mid-Atlantic, n=1,215; New England, n=1,200) (2025: Mid-Atlantic, n=1,209; New England, n=1,209)
*Due to rounding.

To provide a more realistic estimation of visitation, an 80/20 rule for predicting behaviour was applied. This rule assumes that 80% of those who say they would **definitely** consider visiting a province in the next two years would actually do so, while only 20% of those who say they would **probably** consider visiting a province would actually do so. Application of this rule provides a more conservative estimate that between 21% and 34% of travellers would likely consider visiting an Atlantic Canadian province in the next two years.



Likelihood to Consider Atlantic Canada

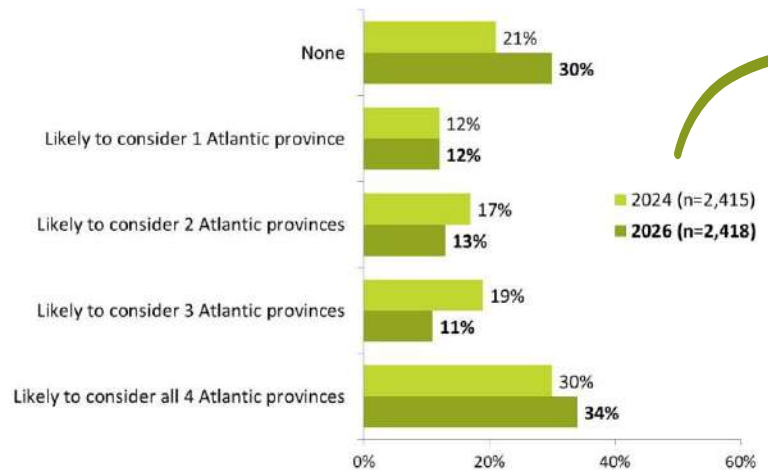
While a clear majority of US travellers are likely to consider visiting Atlantic Canada over the next two years, intentions are down compared to 2024.

To further assess the likelihood of travel to Atlantic Canada over the next two years, the number of Atlantic Canada provinces that travellers say they would *definitely* or *probably* consider visiting in the next two years was calculated.

- Overall, the majority of US travellers indicate they would likely consider visiting Atlantic Canada over the next two years, with seven in ten expressing some likelihood of visiting at least one Atlantic Canadian province during this period. While overall consideration of the region is down from 2024 (70% in 2026 vs. 79% in 2024), one-third currently express some level of consideration for visiting **all four Atlantic provinces** during this timeframe – representing a marginal increase from 2024.
- Travel intentions continue to vary by region, with those from New England being more likely than those from the Mid-Atlantic to consider at least one Atlantic Canada province over the next two years (76% vs. 67%). At the same time, across demographics, US travellers under the age of 55, those with children in the home, and those with annual household incomes below \$150K are more likely than their respective counterparts to consider visiting a province in Atlantic Canada. (Tables 15a-d combined)

Likely to Consider Atlantic Canada Vacation

% Definitely/Probably



Likely to Consider at Least One Atlantic Canada Vacation

% Definitely/Probably



By Region...

Likely to Consider Atlantic Canada Vacation

% Definitely/Probably

	Mid-Atlantic		New England	
Sample size (n)	2024 n=1,215	2025 n=1,209	2024 n=1,200	2025 n=1,209
None	26%	33%	11%	24%
Likely to consider 1 Atlantic province	14%	12%	10%	14%
Likely to consider 2 Atlantic provinces	15%	12%	21%	14%
Likely to consider 3 Atlantic provinces	15%	10%	30%	14%
Likely to consider all 4 Atlantic provinces	31%	34%	29%	34%
Likely to consider at least 1 Atlantic province	74%	67%	89%	76%

Q.15a-d [COMBINED]: When thinking of your travel plans over the next 2 years, how likely are you to consider each of the following destinations as part of a vacation trip of 2 or more nights away from home, where at least 1 night is spent in paid accommodations? Number of Atlantic Provinces Definitely or Probably would consider visiting.





Barriers to Considering Atlantic Canada

Lack of familiarity is increasingly likely to be mentioned as the primary barrier to considering Atlantic Canada as a vacation destination.

US travellers who indicated they would *probably not* or *definitely not* consider Atlantic Canada as a destination were asked, unaided, what keeps them from considering any of the Atlantic provinces as a vacation spot.

- At least three in ten are unable to cite a specific reason for their lack of interest, down notably from 2024.
- Among those who did cite a reason, US travellers most commonly report a **lack of familiarity** as a barrier, followed by a **lack of personal desire**, a **preference for other destinations**, and **distance**. Few other barriers for visitation are mentioned, including **cost concerns**, **climate**, a perception that there's **nothing to do**, **time constraints**, **transportation limitations**, and **having already visited the region**. Of note, unaided, the current geopolitical climate was not top of mind as a barrier to considering Atlantic Canada as a vacation destination.
- Generally, travellers from the Mid-Atlantic are slightly more likely than those from New England to cite a **lack of familiarity** as a barrier to visiting each Atlantic province as a vacation destination (NB: 29% vs. 24%, NL: 33% vs. 30%, NS: 21% vs. 13%, PEI: 29% vs. 23%, respectively). (Tables 16-19)

Barriers to Considering Atlantic Canada as a Vacation Destination Unaided Mentions

	NB		NL		NS		PEI	
	2024	2026	2024	2026	2024	2026	2024	2026
Sample size (n)	n=315	n=491	n=354	n=538	n=261	n=332	n=277	n=388
Unfamiliar/Don't know much about it	17%	28%	20%	32%	11%	19%	18%	28%
Not interested/No personal desire	9%	13%	8%	12%	12%	15%	8%	11%
Other preferred destinations/take priority	3%	8%	3%	6%	3%	9%	4%	7%
Distance/Too far away	7%	6%	8%	9%	9%	6%	8%	5%
Price/Expensive	3%	3%	4%	5%	4%	3%	3%	4%
Climate/Weather conditions	3%	3%	5%	5%	5%	8%	4%	2%
Nothing to do there/Boring destination	4%	2%	2%	3%	2%	5%	4%	5%
Time constraints/No time for vacation	1%	1%	2%	0%	2%	0%	1%	1%
Transportation limitations/Not sure how to get there	1%	1%	2%	2%	1%	1%	1%	4%
Have already visited	n/a	1%	n/a	1%	n/a	4%	n/a	2%
Other	6%	1%	6%	3%	6%	4%	5%	1%
Nothing is keeping me from considering it	3%	2%	1%	2%	6%	3%	4%	1%
Don't know/Unsure	49%	38%	46%	29%	45%	30%	44%	34%

Q.16, 17, 18, 19: [IF 'PROBABLY WOULD NOT', OR 'DEFINITELY WOULD NOT' CONSIDER' [PROVINCE] IN Q.15] What if anything keeps you from considering [NB / NL / NS / PEI] as a vacation destination?





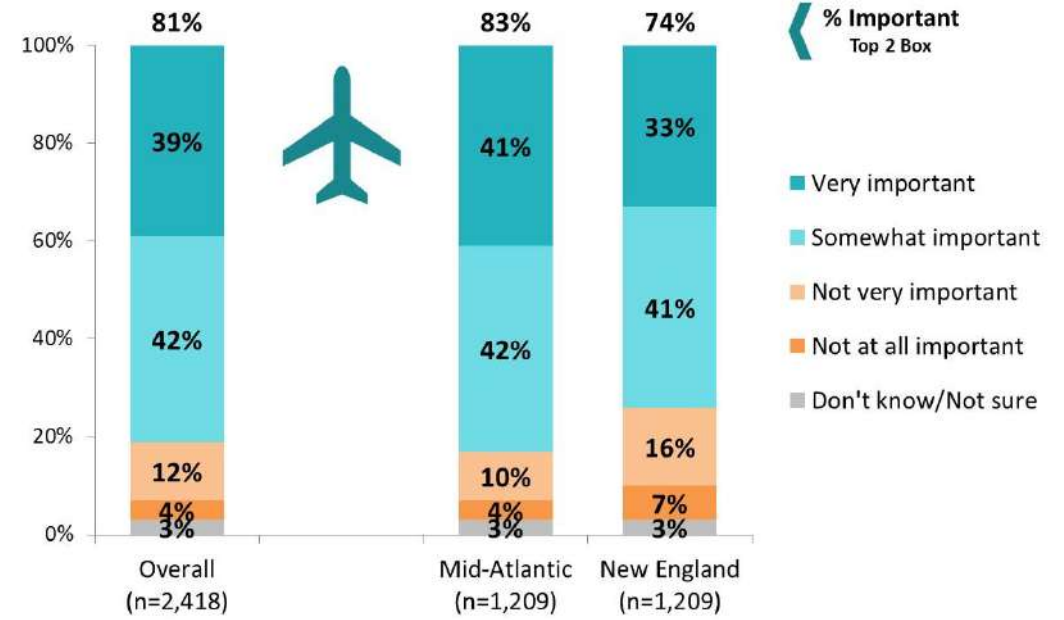
Direct Flights to Atlantic Canada

Direct air access is deemed an important factor for US travellers when considering Atlantic Canada as a vacation destination.

New this year, US travellers were asked how important it is to have a direct flight option to the region when considering a trip to Atlantic Canada.

- The vast majority of US travellers place at least some importance on direct flight access, with four in ten describing it as a 'very important' factor.
- As may be expected, Mid-Atlantic travellers are more likely than those from New England to place importance on having a direct flight option.
- Across demographics, those under the age of 55 are more likely than their older counterparts to place importance on having a direct flight option (18-34: 86% and 35-54: 82% vs. 55-75: 75%). (Table 20)

Importance of Having Direct Flights to Atlantic Canada



Q.20: When considering a trip to Atlantic Canada, how important is it to have a direct flight to the region? New 2026.





Trip Planning/Researching and Booking

Overall, the planning cycle for an Atlantic Canadian vacation takes approximately six months.

Those who previously visited an Atlantic province and were able to recall their planning process, indicated how many months in advance they planned and booked their most recent trip to the region.

- Overall, the planning cycle generally lasted several months. Depending on the province visited, US travellers spent approximately six months **planning and researching** their trip and **booked** their trip three to four months in advance.
- More specifically, for each Atlantic province, approximately three-quarters took no more than six months to **plan and research** their trip. That said, no more than one in ten (9%) travellers took less than a month to plan and research their trip.
- In terms of **booking**, for those who took time to plan their trip (i.e., took at least one month to plan), approximately six in ten booked their trip within a three-month window (NB: 61%; NL: 58%; NS: 61%; PE: 58%).
- Across demographics, those without children in the home are generally more likely to spend more time planning and researching their trip. (Tables 25 & 26)

Average Number of Months to Plan/Research and Book Most Recent Trip to Atlantic Canada

	NB	NL	NS	PEI
Plan/Research				
2026 Sample size (n)	730	631	956	702
Less than one month	9%	6%	9%	9%
1-3 months	33%	29%	32%	31%
4-6 months	34%	37%	34%	34%
More than 6 months	24%	28%	25%	26%
Mean	5.6	6.4	5.7	5.8
Book				
2026 Sample size (n)	436	370	612	408
Less than one month	10%	8%	9%	12%
1-3 months	52%	50%	52%	46%
4-6 months	30%	32%	29%	32%
More than 6 months	8%	10%	10%	10%
Mean	3.6	3.9	3.9	3.8

Q.25: [IF TRAVELLED TO OR HEARD OF ATLANTIC PROVINCES IN Q.10/Q.11] How many months in advance did you start **planning/ researching** your most recent trip to these provinces?

Q.26: [IF TRAVELLED TO OR HEARD OF ATLANTIC PROVINCES IN Q.10/Q.11 AND PLANNED/RESEARCHED AT LEAST 1 TO MORE THAN 6 MONTHS IN ADVANCE] How many months in advance did you start **booking** your most recent trip to these provinces?

Note: Responses of 'Not applicable' and 'Don't know/Unsure' are excluded from the calculations.





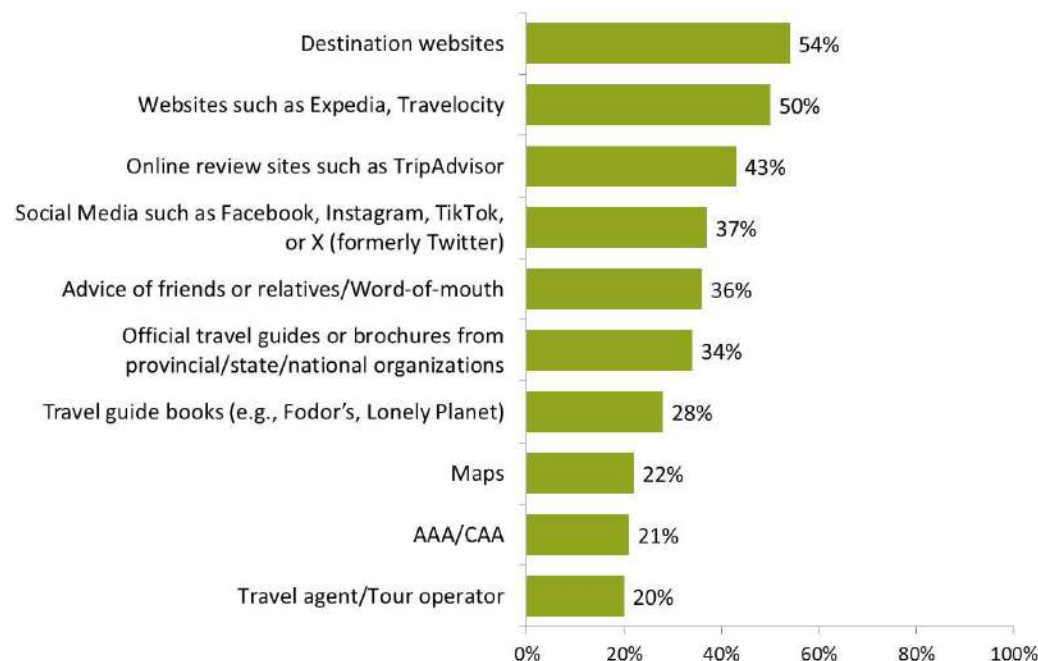
Information Sources

Potential travellers rely on a wide range of information sources on Atlantic provinces with destination websites, travel websites, and online review sites serving as key tools.

Regardless of which Atlantic province they expressed interest in visiting, all potential visitors were asked to identify where they would look for information on Atlantic Canada. A detailed list of options was provided, along with an opportunity to share additional sources, if relevant.

- Overall, a wide range of information sources are considered, and travellers indicate they would use multiple sources (an average of 4.3). Online tools are fundamental, with **destination websites** mentioned most often, closely followed by **travel related websites** (e.g., Expedia, Travelocity). **Online review sites** (e.g., TripAdvisor), **social media** platforms (e.g., Facebook, Instagram, TikTok, X), **advice or word-of-mouth from friends/family**, and **official travel guides or brochures from provincial, state or national organizations** are each identified as information sources by at least one-third of potential travellers. Fewer travellers indicate they would rely on **travel guide books** (e.g., Fodor’s, Lonely Panet), **maps, AAA/CAA**, or a **travel agent/tour operator**.
- Usage of information sources varies across regions and demographics. In particular, usage of non-online information sources (i.e., **advice/word-of-mouth, travel guide books, AAA/CAA, and official travel guides/brochures**) tends to be higher among older travellers, while usage of **destination websites** also increases with age. Conversely, younger travellers are notably more likely than their older counterparts to rely on **social media** (18-34: 53%; 35-54: 42%; 55-75: 16%).
- Across genders, women are more likely than men to rely on **destination websites** (59% vs. 49%), **online review sites** (47% vs. 38%), and **advice from friends or relatives** (40% vs. 32%).
- Finally, across markets, Mid-Atlantic travellers are more likely than New England travellers to use **travel-related websites** such as Expedia and Travelocity (53% vs. 43%), and slightly less likely to use **AAA/CAA** (19% vs. 25%). (Table 27)

Information Sources



Q.27: [IF LIKELY TO CONSIDER TRAVEL TO ATLANTIC PROVINCES; 'MIGHT OR MIGHT NOT', 'PROBABLY WOULD', OR 'DEFINITELY WOULD' IN Q.15] Where would you look for information on [name provinces selected at Q.15]? (n=2,213) KEY MENTIONS.
Note: Responses of 'Don't know/Unsure' are excluded from the calculations.





Potential Traveller Profile



A profile of potential visitors to each of the four Atlantic Canada provinces is also provided, namely those who indicated they were likely to visit over the next two years. (Table 14)

- Those likely to visit Nova Scotia express modest interest in other provinces, while a slight majority of those likely to visit Newfoundland & Labrador also report being likely to visit Nova Scotia. Those who indicate they are likely to visit New Brunswick or Prince Edward Island also report moderate to moderately high interest in other Atlantic provinces, with Nova Scotia being the most commonly identified additional Atlantic Canada province. This may reflect air-travel intentions, given that direct flights are available to Halifax.



Potential NB Visitor (n=176)			
Avg. # of Trips Recently Taken	5.5	Gender	
		Man	50%
		Woman	50%
% Likely to Visit Other Atl. Prov. in Next 2 Years		Age	
NS	38%	18-34	40%
NL	26%	35-54	25%
PEI	24%	55-75	35%



Potential NL Visitor (n=182)			
Avg. # of Trips Recently Taken	6.4	Gender	
		Man	58%
		Woman	42%
% Likely to Visit Other Atl. Prov. in Next 2 Years		Age	
NS	56%	18-34	23%
PEI	40%	35-54	19%
NB	25%	55-75	58%



Potential PEI Visitor (n=301)			
Avg. # of Trips Recently Taken	6.3	Gender	
		Man	43%
		Woman	57%
% Likely to Visit Other Atl. Prov. in Next 2 Years		Age	
NS	49%	18-34	18%
NL	28%	35-54	17%
NB	27%	55-75	64%



Potential NS Visitor (n=563)			
Avg. # of Trips Recently Taken	5.9	Gender	
		Man	46%
		Woman	54%
% Likely to Visit Other Atl. Prov. in Next 2 Years		Age	
PEI	26%	18-34	24%
NL	21%	35-54	17%
NB	14%	55-75	58%





Ad Recall & Motivating Factors for Visitation

The following section provides an overview of recall of tourism related advertising for various destinations, along with assessment of motivating factors for visitation to each Atlantic province.

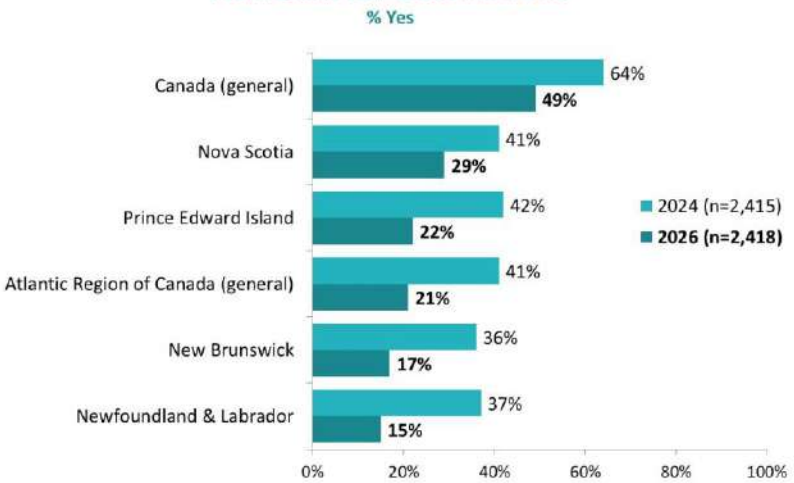


Overall Ad Recall By Destination

Exposure to advertising for Canadian tourism, and Atlantic Canada specifically, is modest, and has declined notably year-over-year.

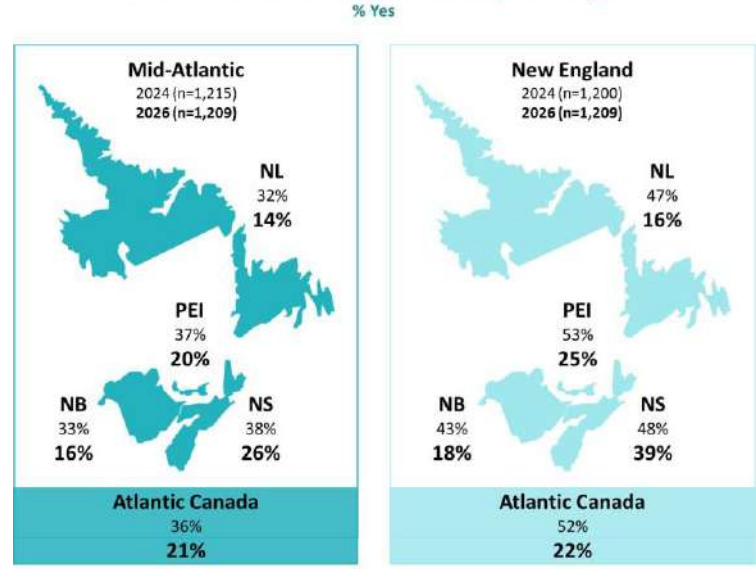
- Overall, one-half of US travellers recall recent advertising related to Canadian tourism in general, reflecting a marked year-over-year change. Two in ten have recently seen or heard advertisements specifically promoting the Atlantic Canada region. That said, ad recall varies across provinces, with Nova Scotia achieving the highest level of recall overall with three in ten US travellers having been exposed to advertising for the province. Two in ten recall advertisements related to Prince Edward Island, while slightly fewer recall advertising for New Brunswick or Newfoundland & Labrador.
- Across US markets, recall of Atlantic Canada travel advertising is generally consistent, both overall and for each province. However, ad recall for Nova Scotia is notably stronger within the New England region, with four in ten New England travellers having seen or heard such ads, compared to one-quarter of Mid-Atlantic travellers. Recall of advertising for Atlantic Canada (general) and for each Atlantic Canada province is higher among US travellers who have recently visited the region. Men and younger travellers are also generally more likely than their respective counterparts to report ad recall. (Tables 28a-f)

Ad Recall for Destinations



Q.28a-f: Thinking about travel advertising or promotions you may have seen on TV, the Internet, billboards, or in newspapers or magazines during the past 12 months, have you seen or heard advertising for any for the following destinations? Slight wording change 2026.

Recall of Atlantic Canada Ads by US Region



Ad recall has declined notable since 2024, which could be attributed to several factors:

- Timing of the ad buy relative to the data collection period (2024 data collection in Oct.; 2026 data collection in Jan).
- Changes in the media buy or media mix and/or changes in consumer media behaviour.
- Changes in the competitive landscape (e.g., increased advertising promoting US travel).





Motivating Factors to Visit: New Brunswick



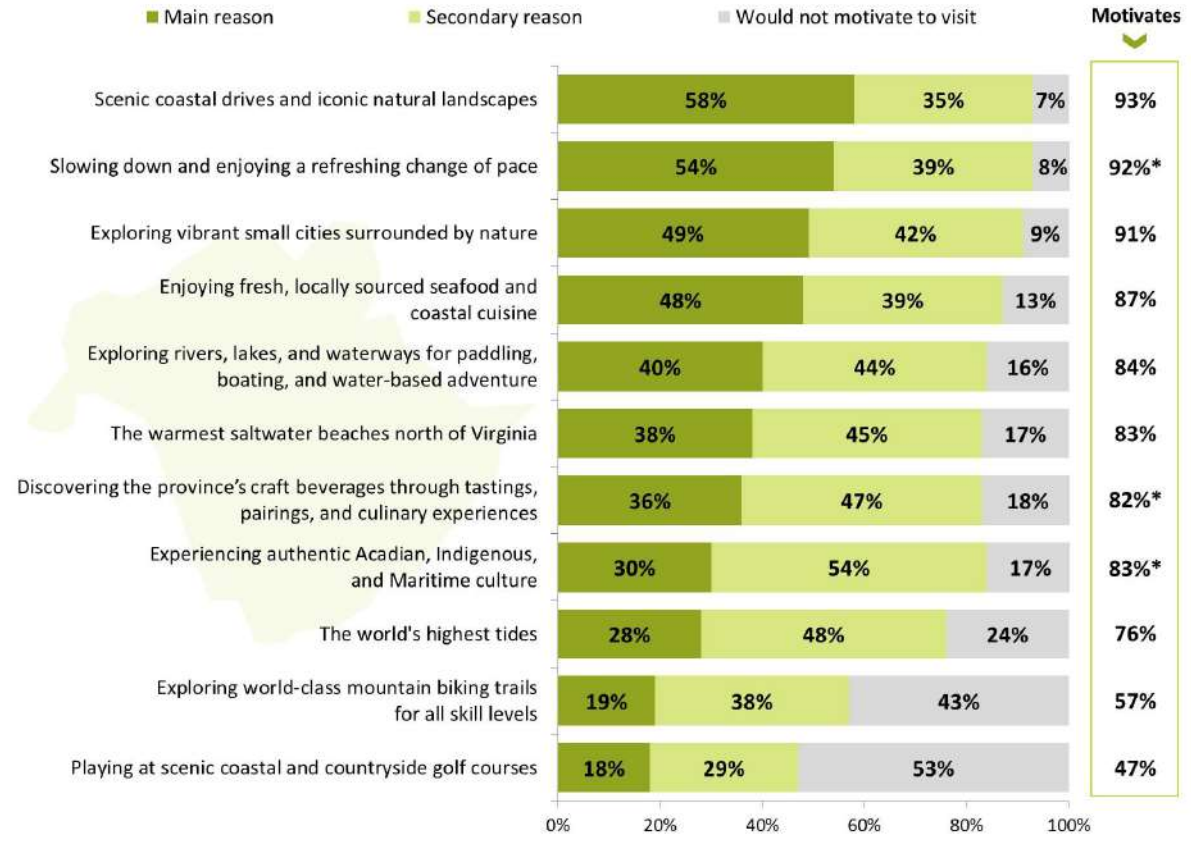
A variety of factors are considered strong motivators to visit New Brunswick, most notably its scenic drives and change of pace.

US travellers were asked to what extent specific attributes of each province would motivate them to visit that province.

New Brunswick

- Overall, most factors examined are considered motivators for visiting New Brunswick by the bulk of US travellers. That said, more than one-half cite its *scenic coastal drives and iconic natural landscapes* and *slowing down and enjoying a refreshing change of pace* as a main reason for visiting New Brunswick.
- Exploring vibrant small cities surrounded by nature, enjoying fresh, locally sourced seafood and coastal cuisine, and exploring rivers, lakes, and waterways for paddling, boating, and water-based adventures* are each considered main motivators to at least four in ten US travellers overall, while marginally fewer consider *the warmest saltwater beaches north of Virginia* and *discovering the province's craft beverages through tastings, pairings and culinary experiences* as main motivators. *Experiencing authentic Acadian, Indigenous and Maritime culture* and *the world's highest tides* are each considered main visitation motivators by three in ten US travellers, while fewer feel this way about *exploring world-class mountain biking trails for all skill levels* and *playing at scenic coastal and countryside golf courses*.
- Motivating factors are generally consistent across the Mid-Atlantic and New England markets. That said, older travellers (i.e., those 55-75 years of age) are less likely than their younger counterparts to cite *exploring world-class mountain biking trails, playing at scenic coastal and countryside golf courses, exploring rivers, lake and waterways* and *discovering the province's craft beverages* as motivators for visiting New Brunswick. (Tables 21a-k)

Motivating Factors to Visit NB



Q.21a-k: [IF 'MIGHT OR MIGHT NOT', OR 'PROBABLY WOULD' OR 'DEFINITELY WOULD' CONSIDER VISITING IN Q.15] Below is a selection of things to see and do in New Brunswick. What impact, if any, would each of the following factors have in motivating you to visit this province? (n=1,927) *Due to rounding.





Motivating Factors to Visit: Newfoundland & Labrador

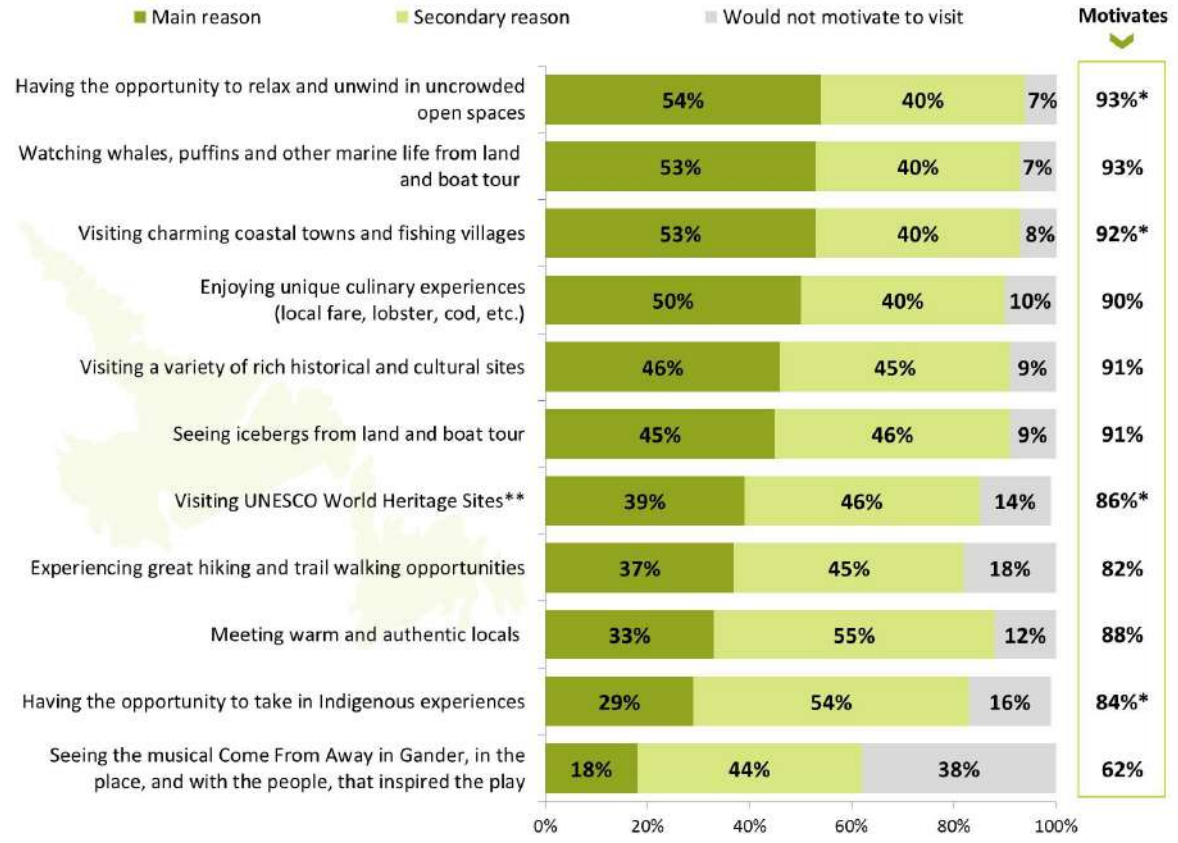


Many factors are considered motivators to visit Newfoundland & Labrador, most notably the opportunity to unwind, seeing natural wildlife, and visiting coastal towns.

Newfoundland & Labrador

- With one exception, eight in ten or more US travellers say each factor would be motivating in visiting Newfoundland & Labrador. More than one-half cite **having the opportunity to relax and unwind in uncrowded open spaces, watching whales, puffins and other marine life from land and boat tours, and visiting charming coastal towns and fishing villages** as main reasons for travel to the province.
- At the same time, at least one-third of travellers consider **enjoying unique culinary experiences, visiting a variety of rich historical and cultural sites, seeing icebergs from land and boat tours, visiting UNESCO World Heritage Sites, experiencing great hiking and trail walking opportunities, or meeting warm and authentic locals** as main reasons for visiting the province. Slightly fewer feel this way about **having the opportunity to take in Indigenous experiences**. Approximately two in ten consider **the musical Come From Away in Gander** as a main factor for visiting Newfoundland & Labrador.
- Motivating factors are generally consistent between the Mid-Atlantic and New England markets. However, older travellers (i.e., those 55-75 years of age) are less likely than their younger counterparts to cite **experiencing great hiking and trail walking opportunities** and **seeing the musical Come From Away in Gander** as motivators for visiting Newfoundland & Labrador. (Tables 22a-k)

Motivating Factors to Visit NL



Q.22a-k: [IF 'MIGHT OR MIGHT NOT', OR 'PROBABLY WOULD' OR 'DEFINITELY WOULD' CONSIDER VISITING IN Q.15] Below is a selection of things to see and do in Newfoundland & Labrador. What impact, if any, would each of the following factors have in motivating you to visit this province? (n=1,880) *Due to rounding. ** (Gros Morne National Park, L'Anse aux Meadows, Red Bay, Mistaken Point, Discovery Geopark)





Motivating Factors to Visit: Nova Scotia

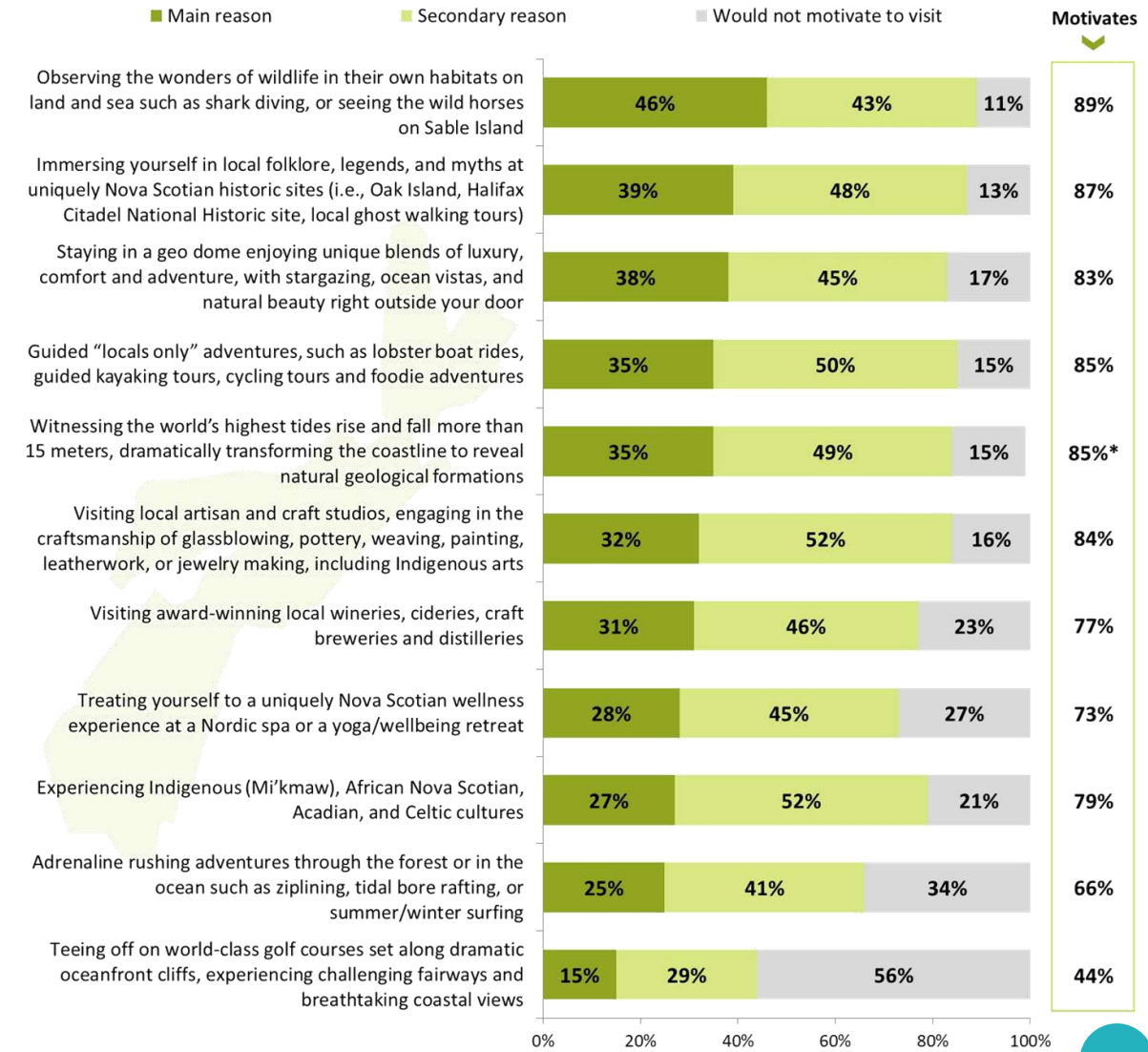


Observing the wonders of wildlife in their own habitats is the foremost driver for future visits to Nova Scotia, though most other factors are considered motivators by the bulk of US travellers.

Nova Scotia

- Similar to other provinces, the bulk of travellers consider almost all factors examined as motivators for visiting Nova Scotia, with nearly one-half citing *observing the wonders of wildlife in their own habitats* as a main reason for visiting.
- At least three in ten travellers consider *immersing yourself in local folklore, legends and myths at uniquely Nova Scotian historic sites, staying in a geo dome, guided 'locals only' adventures, witnessing the world's highest tides, visiting local artisan and craft studios, or visiting award-winning local wineries, cideries, craft breweries and distilleries* as a primary motivator for visiting the province. Slightly fewer feel this way about *wellness activities, experiencing Indigenous, African Nova Scotian, Acadian and Celtic cultures, and adrenaline rushing adventures through the forest or in the ocean*. Only one in six consider *teeing off on world-class golf courses set along dramatic oceanfront cliffs* to be a main motivator for visiting Nova Scotia.
- Again, while motivations are generally consistent across markets, some key differences across demographics are noted. Specifically, older travellers are less likely than their younger counterparts to consider a *uniquely Nova Scotian wellness experience at a Nordic spa or yoga/wellbeing retreat, adrenaline rushing adventures through the forest or in the ocean, and teeing off on world-class golf courses* as motivators for visiting Nova Scotia. Men are also more likely than women to consider these latter two factors as motivators for visiting the province. (Tables 23a-k)

Motivating Factors to Visit NS



Q.23a-k: [IF 'MIGHT OR MIGHT NOT', OR 'PROBABLY WOULD' OR 'DEFINITELY WOULD' CONSIDER VISITING IN Q.15] Below is a selection of things to see and do in Nova Scotia. What impact, if any, would each of the following factors have in motivating you to visit this province? (n=2,086) *Due to rounding.



Motivating Factors to Visit: Prince Edward Island

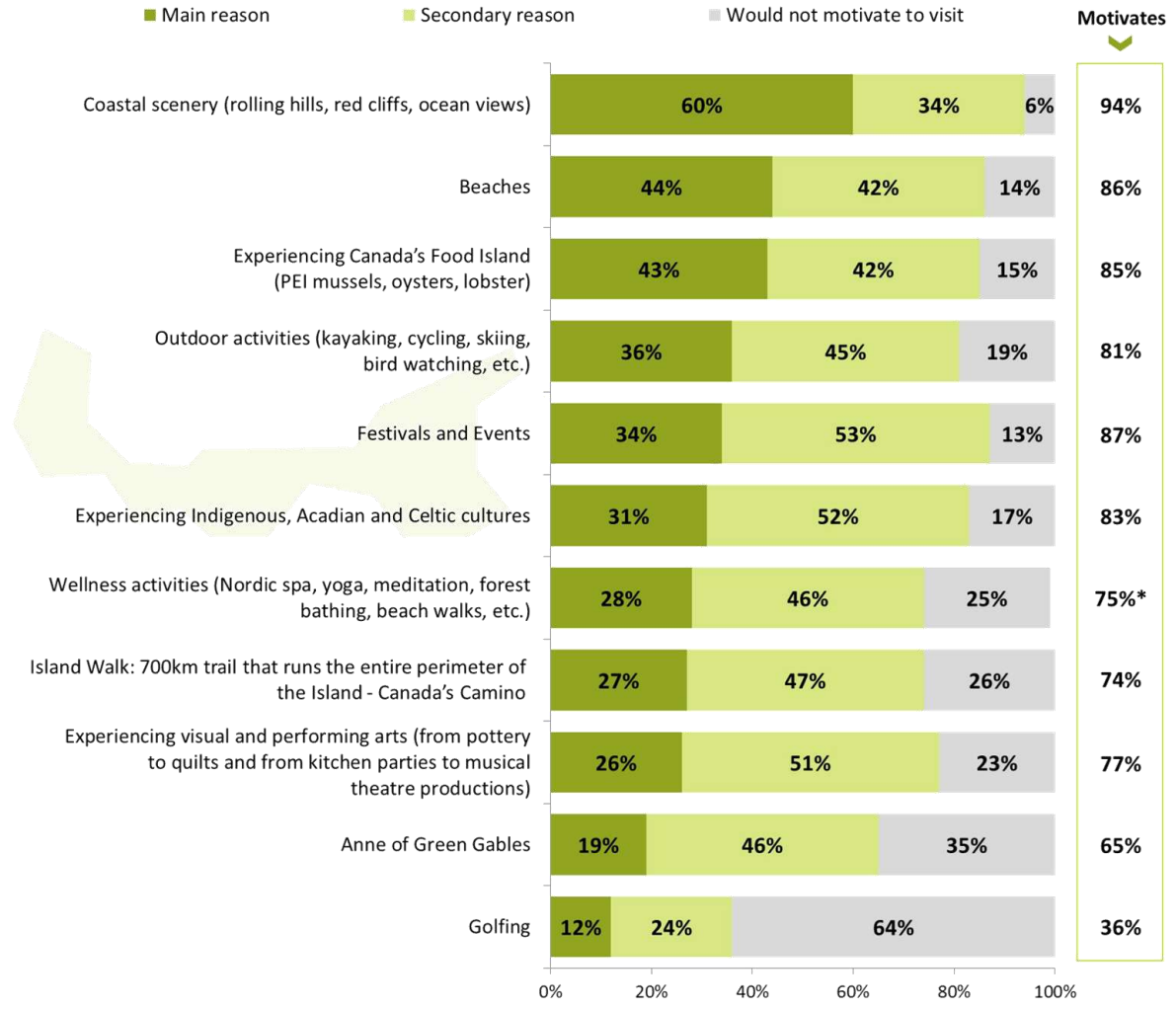


Coastal scenery is considered the greatest motivator for visiting PEI in the future, along with a wide variety of other factors including beaches, experiencing Canada's Food Island, and festivals and events.

Prince Edward Island

- With the exception of golfing, at least two-thirds of US travellers cite each factor as a motivator for future visits to Prince Edward Island. That said, six in ten find the Island's **coastal scenery (rolling hills, red cliffs, ocean views)** to be a main reason for visiting, while **beaches** and **experiencing Canada's Food Island** are each cited as main reasons by more than four in ten US travellers.
- More than one-third report **outdoor activities** and **festivals and events** as main reasons to visit, while slightly fewer would be primarily motivated by **experiencing Indigenous, Acadian and Celtic cultures**, **wellness activities**, the **Island Walk**, and **experiencing visual and performing arts**.
- Two in ten US travellers consider **Anne of Green Gables** to be a main reason for visiting, while one in ten would consider **golfing** to be a main reason to come to the Island.
- Results are again generally consistent across markets and demographics, although older travellers are generally less likely to find wellness and active outdoor/recreational activities as being motivating. Specifically, older travellers are less likely than their younger counterparts to consider **wellness activities**, **an Island walk**, **outdoor activities**, **experiencing visual and performing arts**, and **golfing** as motivators for visiting Prince Edward Island. Men are again more likely than women to consider golfing a motivators for visiting. (Tables 24a-k)

Motivating Factors to Visit PEI



Q.24a-k: [IF 'MIGHT OR MIGHT NOT', OR 'PROBABLY WOULD' OR 'DEFINITELY WOULD' CONSIDER VISITING IN Q.15] Below is a selection of things to see and do in Prince Edward Island. What impact, if any, would each of the following factors have in motivating you to visit this province? (n=2,030) *Due to rounding.





US/Canada Travel



The following section explores geopolitical awareness and sentiment and perceptions of Canada as a travel destination broadly, including how the US-Canada relationship shapes overall appeal and actual/expected travel behaviour. Of note, unaided, the current geopolitical climate was not top of mind as a barrier to considering Atlantic Canada as a vacation destination.

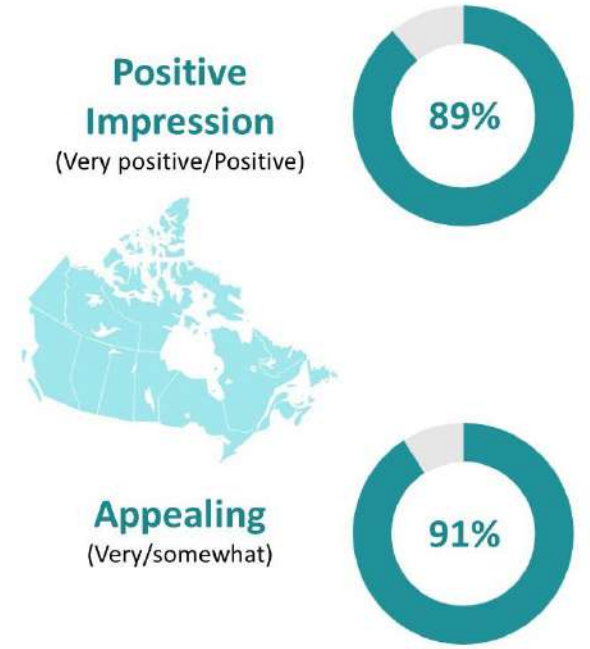


Impression and Appeal of Canada

US travellers from the Mid-Atlantic and New England regions hold overwhelmingly positive views of Canada, with perceptions consistent across both markets.

- Overall, nine in ten US travellers have a **positive impression** of Canada as a place to visit, with one-half (49%) holding 'very positive' impressions. Impressions of Canada as a place to visit are consistent across markets.
- When asked how **personally appealing** Canada is as a travel destination, the same proportion consider it appealing, with one-half (51%) describing Canada as a 'very appealing' vacation destination. Once again, perceptions are consistent across both markets.
- Those under the age of 55 and those with lower household incomes are slightly more likely than their respective counterparts to find Canada personally appealing as a travel destination. (Tables 29 & 30)

Canada as a Place to Visit/Destination



Q.29: What is your overall impression of Canada as a place to visit? (n=2,418)
 Q.30: And how appealing is Canada to you as a travel destination right now? (n=2,418)
 New 2026.



US and Canada Situation/Relationship

Awareness of the current US-Canada geopolitical situation is high, with the vast majority of US travellers considering themselves informed about the matter.

- Nearly nine in ten US travellers report being aware of the current geopolitical situation between the United States and Canada, with nearly one-half (45%) considering themselves to be 'very aware' of the situation.

For those with some level of awareness, US travellers were asked to provide, unaided, additional context regarding their impressions of the situation.

- A wide range of feedback was offered, reflecting both positive and negative viewpoints. Among those with negative impressions, the situation was most-commonly described as 'not good' or 'tense', with some citing general dissatisfaction with the situation, expressing dissatisfaction with the President, perceiving the US as acting aggressively or poorly towards Canada, feeling the situation was unnecessary, or generally describing it as a trade/tariff issue. Conversely, those with a more optimistic or neutral outlook most often characterized the situation as positive or stable, said it had no personal impact on their travel, expressed optimism that the situation would improve, or expressed general support for Canada.
- Regardless of their awareness or impressions of the situation, overall, only three in ten US travellers consider the current US-Canada relationship to be positive, with only one in ten describing it as 'very positive'. Conversely, one-third view the relationship as negative, with New England travellers more likely than Mid-Atlantic travellers to hold this view. Overall, the net perception of the current relationship between the US and Canada is negative; however, this does not translate to negative perceptions of Canada as a vacation destination. (Tables 31-33)

Survey Quotes:

"It's more hype than anything else!"

"I think everything will work out in the long-term."

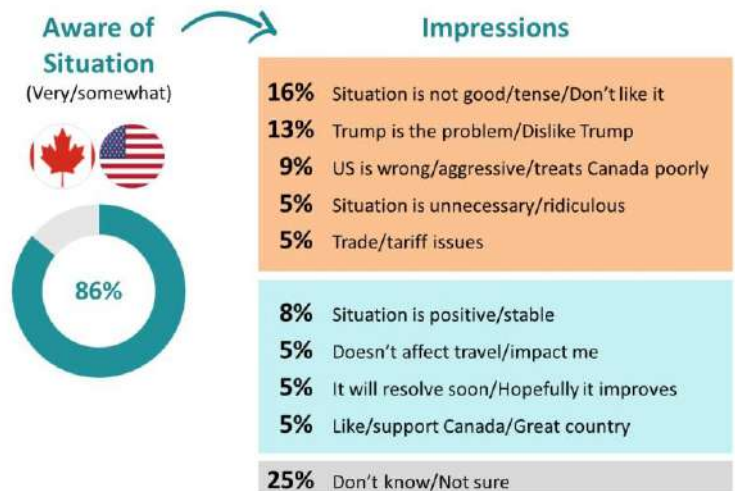
"Our government seems determined to alienate our northern neighbors."

"I think that Canada is on the right side of the issue. The current US administration is being a bully and wants to take over the whole continent."

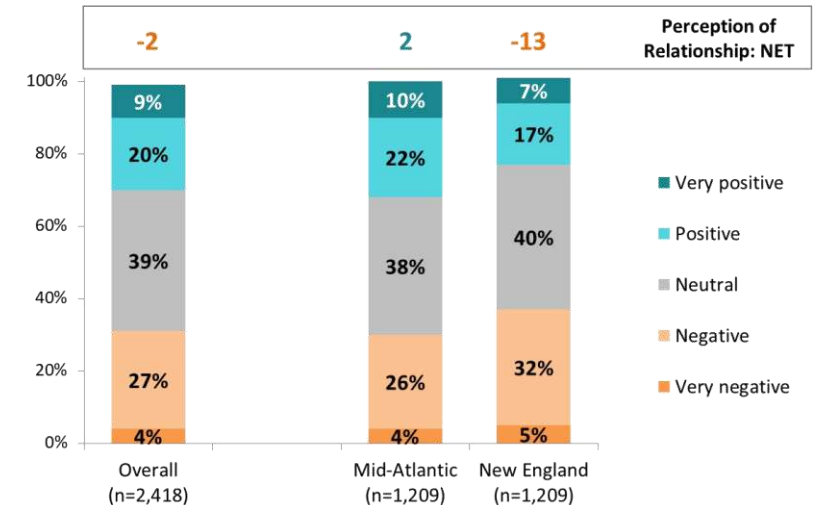
"As an American, right now is not a good time to visit Canada because we are vilified."

"I think there is some tension between the US and Canada. Not sure how much they want us there."

Current Geopolitical Situation Between the US & Canada



Current Relationship Between US & Canada



Q.31: How aware are you of the current geopolitical situation between the US and Canada? (n=2,418)
 Q.32: [IF AWARE OF GEOPOLITICAL SITUATION IN Q.31] What is your impression of the situation? (n=2,079) UNAIDED KEY MENTIONS, New 2026.

Q.33: How would you describe the current relationship between the US and Canada? New 2026. *Due to rounding.



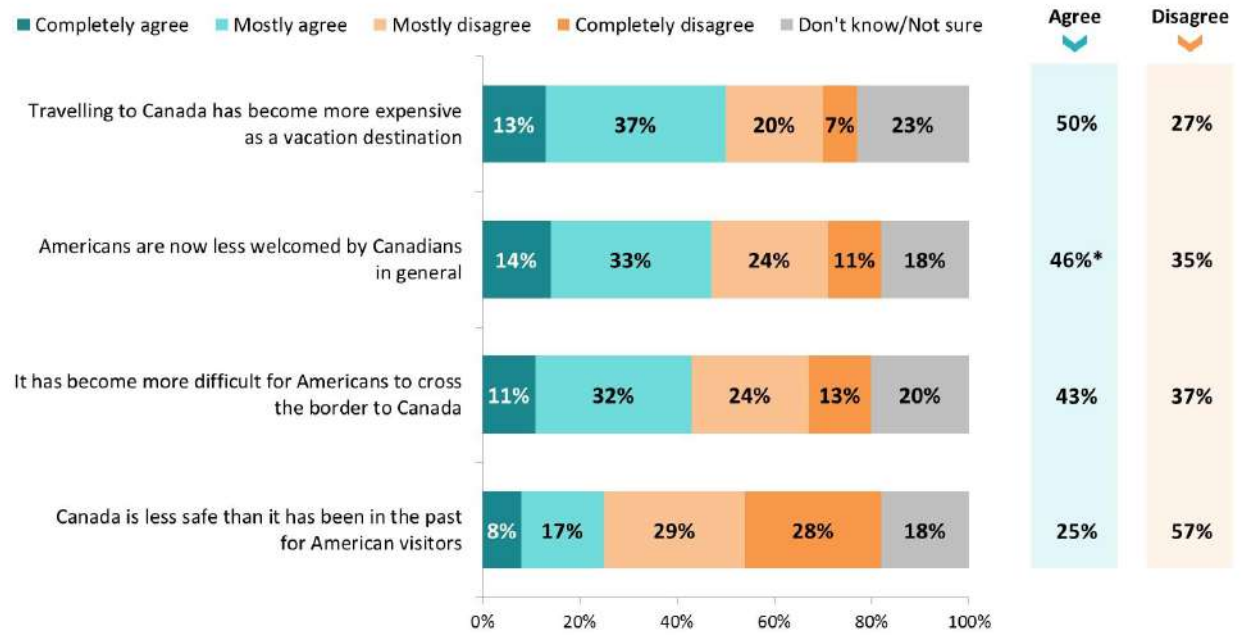
Current Perceptions About Travel to Canada

Overall, perceptions of how travel to Canada has changed in recent years are mixed, with notable proportions of US travellers across both markets expressing concerns about rising costs, reduced welcome, increased border difficulty, and safety.

Regardless of their impressions of Canada or of the current US-Canada geopolitical situation, all US travellers were asked to indicate their level of agreement with four statements assessing how travel to Canada today compares with two to three years ago.

- One-half of US travellers express some level of agreement that *travelling to Canada has become more expensive as a vacation destination*, with just over one in ten offering 'complete agreement'. Conversely, approximately one-quarter disagree with this assessment, while slightly fewer are uncertain.
- Nearly one-half of US travellers agree *Americans are now less welcomed by Canadians in general*, while just over one-third disagree with this view.
- Perceptions of border difficulty are mixed. While more than four in ten offer some level of agreement that it has *become more difficult for Americans to cross the border into Canada*, only slightly fewer disagree with this statement.
- Most US travellers disagree with the notion that *Canada is a less safe destination than it has been in the past for American visitors*. However, one-quarter believe there is some validity to this idea, with nearly one in ten in 'complete agreement'.
- Perceptions regarding how travel to Canada has changed in recent years are generally consistent across the two markets. That said, those who have recently visited at least one Atlantic Canada province and male travellers are more likely than their respective counterparts to express some level of agreement with each statement examined. (Tables 34a-d)

Travel to Canada Now Compared with 2-3 Years Ago



Q.34a-k: Thinking about travel to Canada now, compared with two to three years ago, to what extent do you agree or disagree with each of the following statements? (n=2,418)
*Due to rounding.



Travel Plans

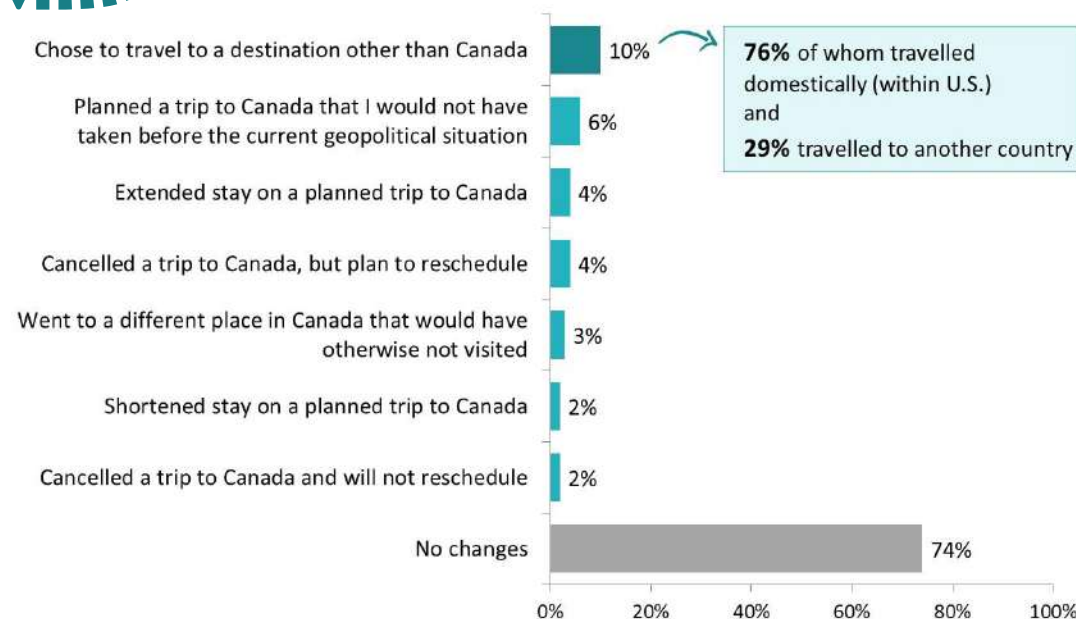
Despite noted decline in recent travel to Canada and some expressed concern about the US-Canada geopolitical situation, most US travellers indicate their own travel plans to Canada have been unaffected over the past year.

Again, regardless of their level of awareness of the US-Canada geopolitical situation, all US travellers were also asked whether their own travel plans to Canada had changed over the past year as a result of the situation.

- Overall, three-quarters report that the current situation has had **no impact** on their plans.
- Among those who indicated the situation had influenced their Canadian travel plans, the most common alternative plan was **choosing to travel to an alternative destination**. Fewer reported other types of changes, including **taking a trip to Canada they would not otherwise have taken, extending their Canadian vacation, cancelling a trip they intend to reschedule, shortening their stay in Canada, or cancelling their trip with no plans to reschedule**.
- For those who chose an alternative destination, the majority replaced their planned trip to Canada with **travel within the US**. (Tables 35-36)



Travel Plans to Canada Changed in Past Year Due to Current Geopolitical Situation



Q.35: In the past year, how, if at all, have your travel plans to Canada changed because of the current geopolitical situation? (n=2,418)
 Q.36: [IF CHOSE TO TRAVEL TO DESTINATION OTHER THAN CANADA IN Q.35] When you chose to travel to a destination other than Canada, which of the following best describes this trip? (n=234)
 New 2026.



Respondent Profile

The following outlines the demographic and regional breakdown of respondents.



2026 Respondent Profile

The following provides a profile of survey respondents (n=2,418).

