

Recent Travel Activity



On average, US travellers took **5** out of state trips in recent years

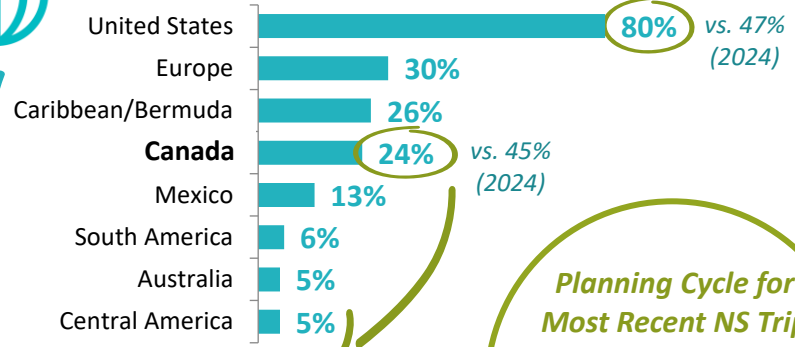


29%

of US travellers recalled recent travel advertising or promotions over the past year specifically for **Nova Scotia**



Top Destinations Travelled in Recent Years



Of those who recently visited Canada went to **Nova Scotia**
(Mid-Atlantic: 15% vs. New England: 23%)

Planning Cycle for Most Recent NS Trip

59% Took 4+ months to plan their NS trip
61% Booked up to 3 months in advance

Awareness & Familiarity



61%

of US travellers are **aware** of NS

Of those **aware**...

65%

are **familiar** with what there is to see and do in the Province



Future Travel Considerations

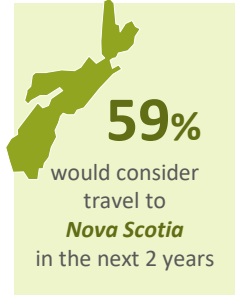


Of US travellers are **'actively planning'** a trip to **Canada**
(vs. 42% in 2024)



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)

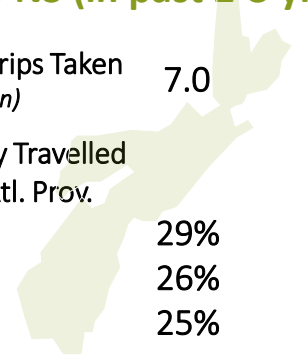


would consider travel to **Nova Scotia** in the next 2 years

Profile of Visitors to NS (in past 2-3 yrs)

(n=101)

Avg. # of Trips Taken (Any Location)	7.0	Gender	
		Man	63%
		Woman	37%
% Recently Travelled to Other Atl. Prov.		Age	
PEI	29%	18-34	37%
NL	26%	35-54	28%
NB	25%	55-75	34%



81%

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



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










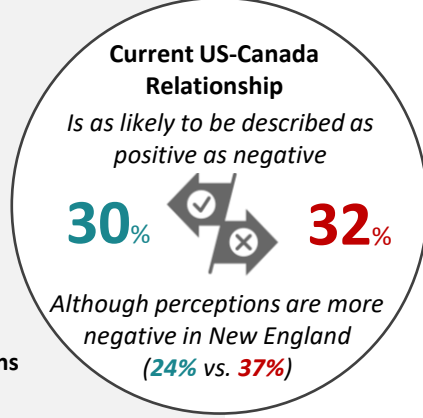


Main Motivating Factors to Visit NS

-  **46%** Observing wonders of wildlife in own habitats (e.g., shark diving, wild horses on Sable Island)
-  **39%** Immersing oneself in local folklore, legends and myths at uniquely NS historic sites
-  **38%** Staying in a geo dome enjoying unique blends of luxury, comfort and adventure
-  **35%** Guided 'locals only' adventures (e.g., lobster boat rides, guided kayaking tours, cycling tours, foodie adventures)
-  **35%** Witnessing the world's highest tides
-  **32%** Visiting local artisan and craft studios, engaging in the craftsmanship
-  **31%** Visiting award-winning local wineries, cideries, craft breweries and distilleries
-  **28%** Treating yourself to a uniquely Nova Scotian wellness experience
-  **27%** Experiencing Indigenous, African Nova Scotian, Acadian and Celtic cultures
-  **25%** Adrenaline rushing adventures through the forest or in the ocean (e.g., ziplining, tidal bore rafting, surfing)
-  **15%** Teeing off on world-class golf courses set along dramatic oceanfront cliffs

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



Key Considerations

1. US travel patterns have shifted, at least in the near term.
2. 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.
3. Despite near-term travel impacts and concerns, there remains a strong opportunity to maintain visibility and remain top-of-mind with US travellers.
4. Air access is critical.