SKIFT US PERCEPTION AND BEHAVIOUR RESEARCH PROGRAM

Prioritizing perceptions of Canada among US traveller consumers

Wave 1 Results; Presentation 2

July 2025

Skift
ADVISORY

INTRODUCTION

- **Shifting U.S.–Canada dynamics**: Rising political tension, tariffs chaos, and changing leadership in both countries are creating new uncertainties for cross-border tourism.
- **Tourism at risk**: With U.S. travellers making up a critical share of Canada's visitor economy, it's vital to understand how current events are reshaping perceptions, intentions, and barriers to travel.

OBJECTIVES

- **To assess travel appetite:** Gauge how likely Americans are to travel to Canada in the next 12–24 months — and what types of trips they're planning.
- **To understand changing sentiment:** Explore evolving views on safety, political climate, affordability, and Canada's overall appeal.
- **To uncover motivators and barriers**: Identify what's driving or deterring U.S. travellers — from media narratives and major events to border concerns and cost.
- **To guide regional action:** Provide region-specific insights to help provincial and local tourism organizations tailor strategies and stay competitive.

METHODOLOGY

A mixed methodology was followed to arrive at key insights regarding Canadian travel intentions from US international travellers.

Overview and Timing

- Data was collected through digital listening and a quantitative survey.
- Digital Listening results span between 1 April and 30 June 2025.
- The survey was conducted between 6 and 17 June 2025.

Digital Listening

- Mentions monitored via Mentionlytics platform.
- Platforms monitored: X, Facebook, YouTube, Instagram, Others (e.g. Reddit, Bluesky).
- Keywords used: Canada / Region + (Travel, Tourism, Visit, Vacation, Holiday, Trip, Itinerary).

Quantitative Survey

- Target population: US international travellers (past or intended) aged 18+
- Data collected via online panel
- Total sample size of 2,000 respondents
- Sample proportionally representative of U.S. demographics

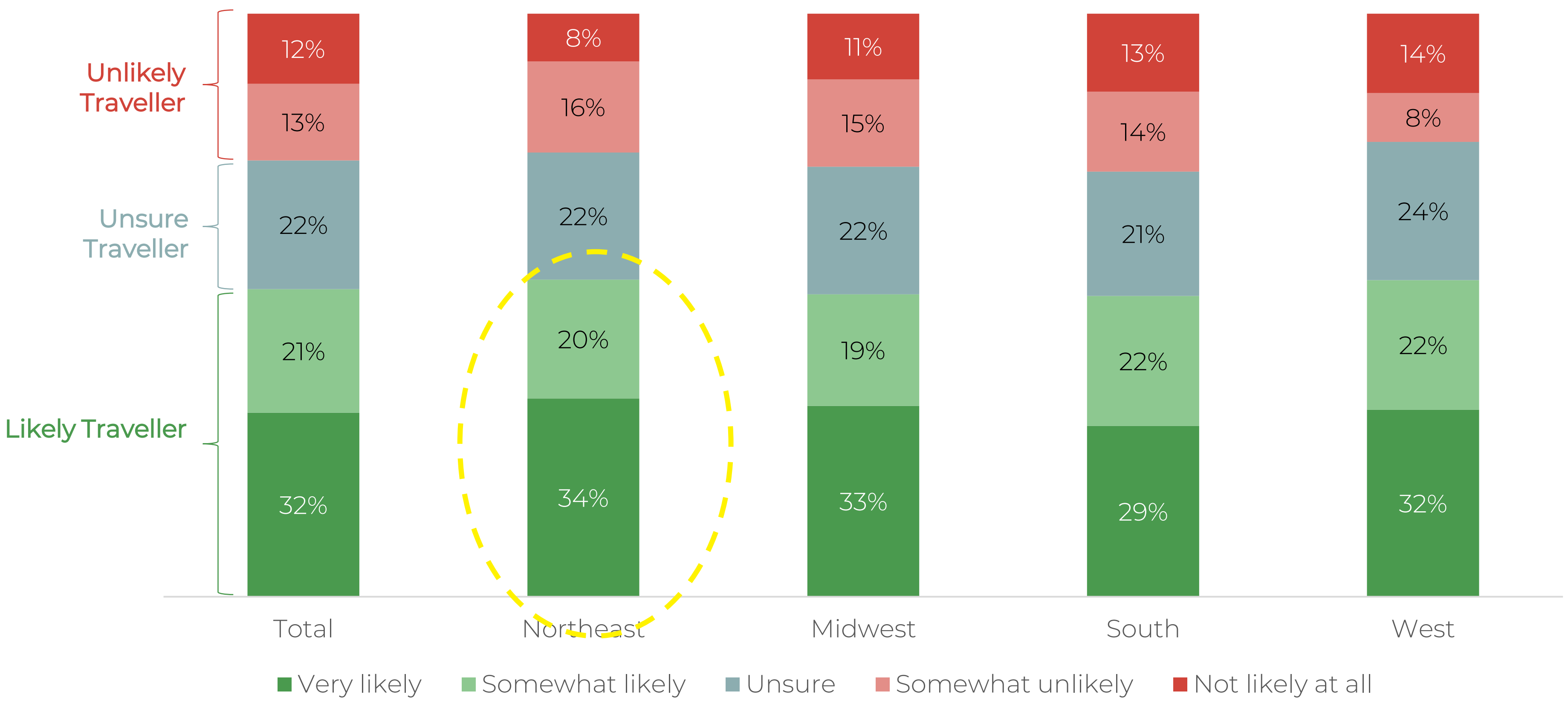
Data Analysis

- Data was analysed against stated likelihood of Canadian travel in the next 12 months
- Regression analysis employed to derive drivers of destination appeal
- Skift contextual insights applied

GENERAL TRAVEL INTENTIONS

More than 50% of US international travellers indicate they are likely to travel to Canada in the next 12 months, with very little variation by region within the US.

Likelihood to travel to Canada in the next 12 months



Impact of political leaning on likelihood to travel (Top-2 Box Score)

Conservative	51%
Independent	51%
Liberal	▲ 62%
Prefer not to say	▼ 26%

- **Conservative**: advocate for limited government, traditional values, free-market policies. Tend to vote Republican.'
- **Liberal**: support progressive change, government intervention to promote social equity, policies like healthcare reform, environmental protection, and diversity. Tend to vote Democrat.
- **Independent**: value pragmatism, may base decisions on personal or economic factors rather than party loyalty.

How likely are you to travel to Canada in the next 12 months?

Likely US Travellers

- Informed and media-aware: Engages with digital and social media platforms (and credible media) and is aware of political and economic developments like tariffs, Trump-era comments, and trade policies.
- Concerned but confident: Has higher overall confidence in the safety and stability of travelling to Canada, but is also more likely than others to express concerns about:
  - Border delays and documentation requirements
  - Feeling unwelcome as a U.S. citizen
  - Economic and political tensions impacting travel
- Demographically distinct: Tends to be younger, more educated, higher income, and slightly less conservative than the general U.S. population.
- Vacation-focused and open-minded: Primarily motivated by leisure travel, especially during summer and fall, with plans for longer stays and higher spending

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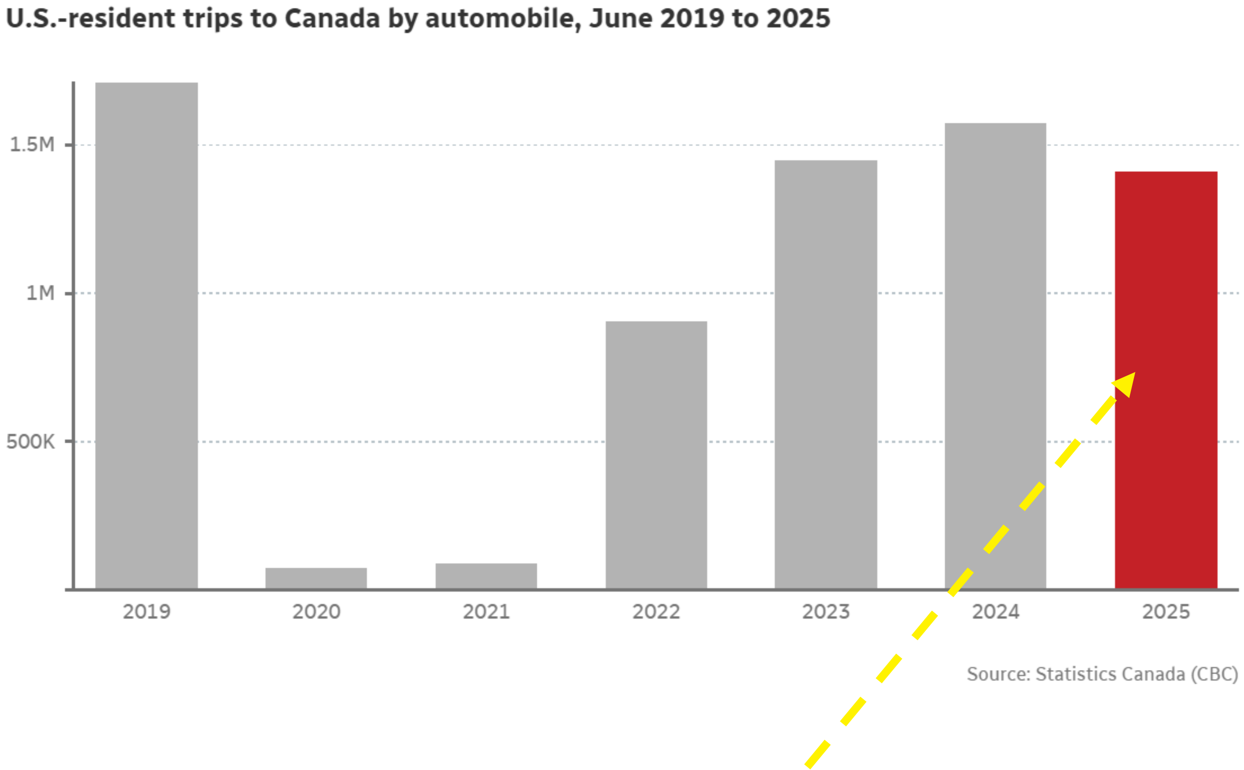
PART 2

Medium to Long-term Strategic Opportunities

AUTO TRAVEL TO CANADA FROM THE US

U.S. arrivals by car dropped 10.4%—about 1.4 million trips versus 1.56 million in June 2024

Total airline capacity Canada to/from US, 2025 vs. 2024 (Top 10 markets)

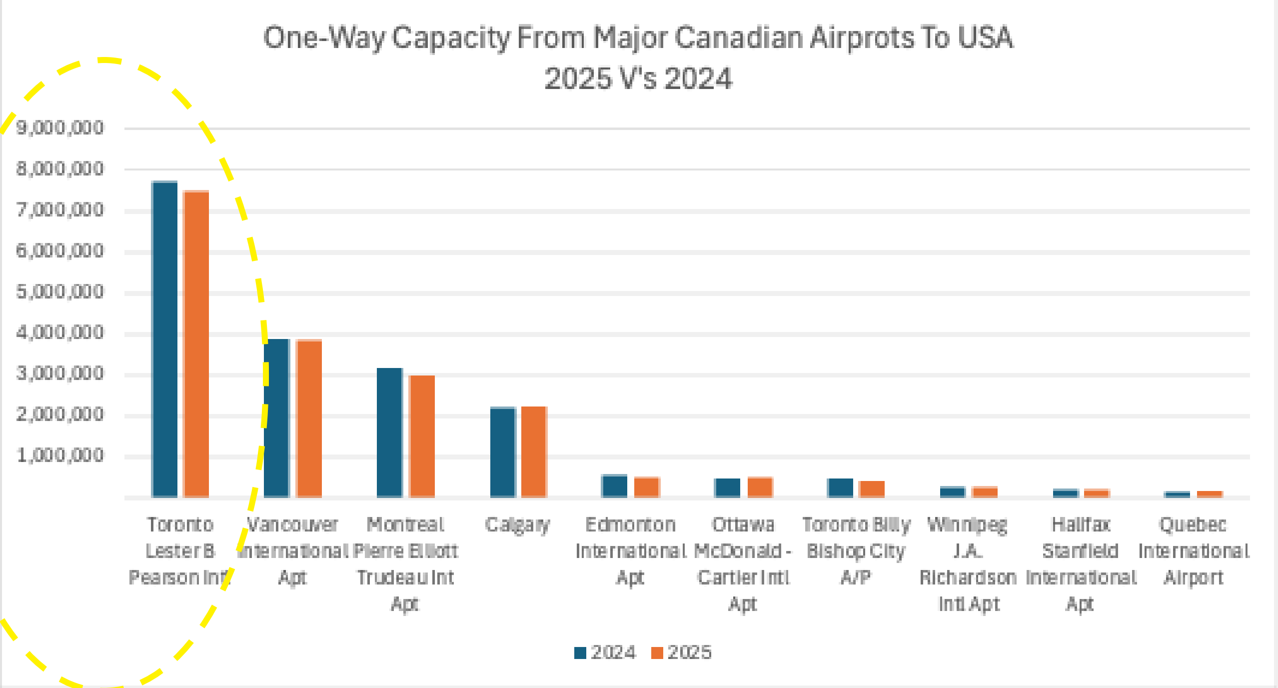


Source: Statistics Canada, 2025

AIRLINE CAPACITY

Capacity is down 3% to/from Toronto 2025 vs. 2024; while relatively small it doesn't tell the full story

Total airline capacity Canada to/from US, 2025 vs. 2024



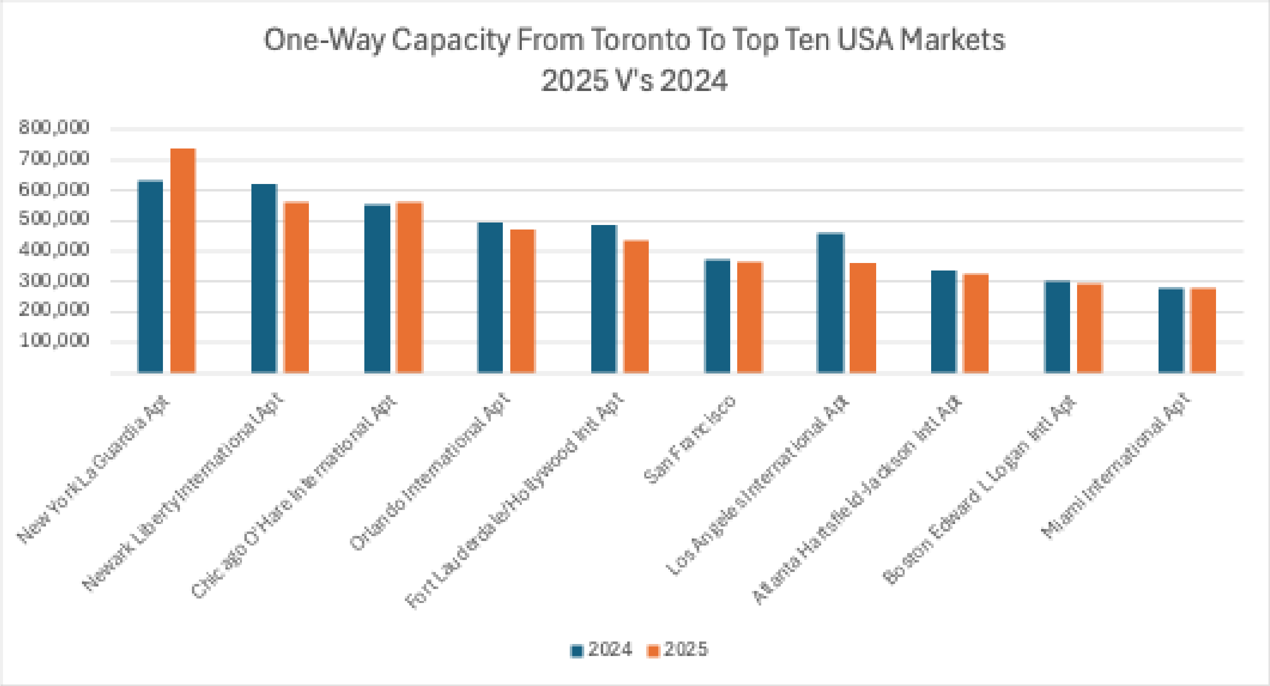
Departing City	2024	2025	% Change
Toronto Lester B Pearson Intl	7,716,764	7,482,126	-3.0%
Vancouver International Apt	3,889,473	3,833,035	-1.5%
Montreal Pierre Elliott Trudeau Int Apt	3,184,787	2,992,683	-6.0%
Calgary	2,208,283	2,232,535	1.1%
Edmonton International Apt	553,894	515,701	-6.9%
Ottawa McDonald - Cartier Intl Apt	479,228	502,316	4.8%
Toronto Billy Bishop City A/P	486,568	401,076	-17.6%
Winnipeg J.A. Richardson Intl Apt	274,794	266,109	-3.2%
Halifax Stanfield International Apt	195,265	219,294	12.3%
Quebec International Airport	145,515	171,101	17.6%
Total Canada	19,432,326	18,932,292	-2.6%

Sources: OAG; Skift Aviation Analysis, 2025

AIRLINE CAPACITY, CONT'D

NY capacity is up, LA capacity is substantially down

Total airline capacity Canada to/from US, 2025 vs. 2024 (Top 10 markets)



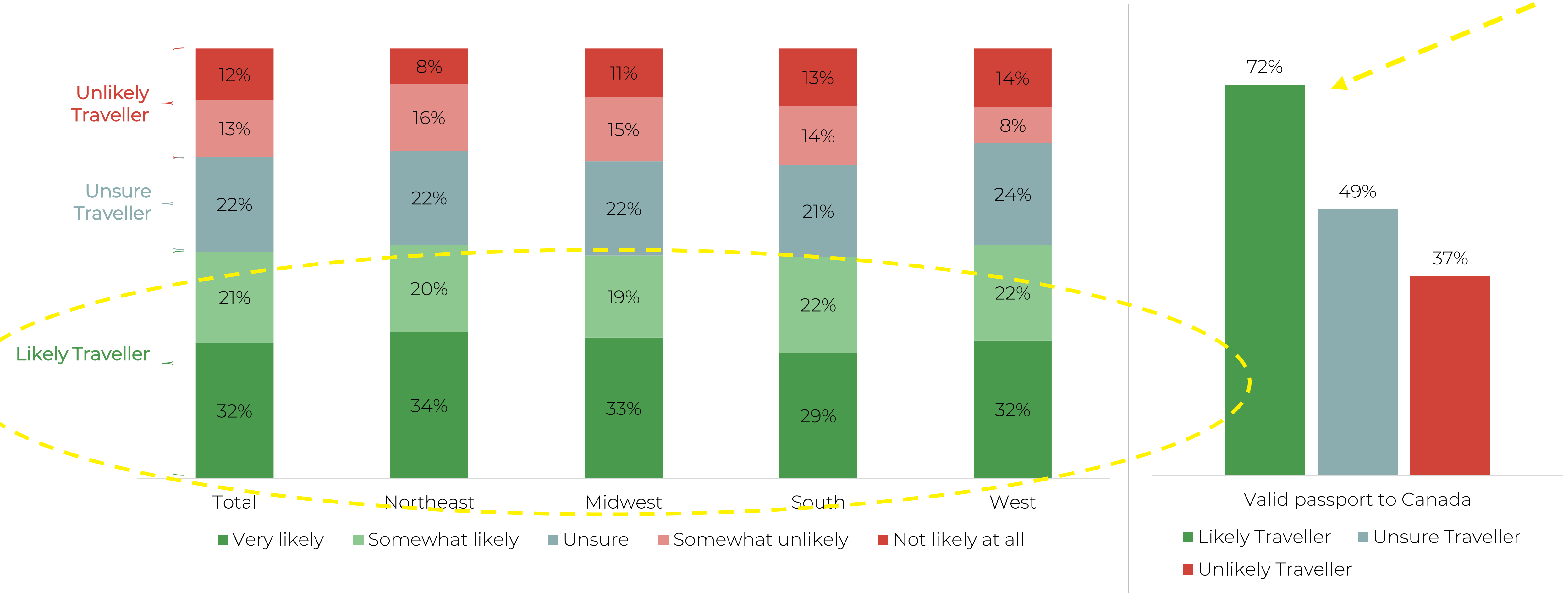
Arriving Cities From Toronto	2024	2025	% Change
New York LaGuardia Apt	633,630	739,013	16.6%
Newark Liberty International Apt	619,750	561,951	-9.3%
Chicago O'Hare International Apt	553,423	560,288	1.2%
Orlando International Apt	495,439	471,017	-4.9%
Fort Lauderdale/Hollywood Intl Apt	487,745	433,409	-11.1%
San Francisco	370,524	364,612	-1.6%
Los Angeles International Apt	457,620	361,084	-21.1%
Atlanta Hartsfield-Jackson Intl Apt	335,952	326,359	-2.9%
Boston Edward L Logan Intl Apt	301,633	294,578	-2.3%
Miami International Apt	278,034	275,809	-0.8%

Sources: OAG; Skift Aviation Analysis, 2025

GENERAL TRAVEL INTENTIONS

Likelihood of travelling to Canada is at least in part correlated with having valid travel documents, indicating lower likelihood is more related to destination apathy than rejection.

Likelihood to travel to Canada in the next 12 months

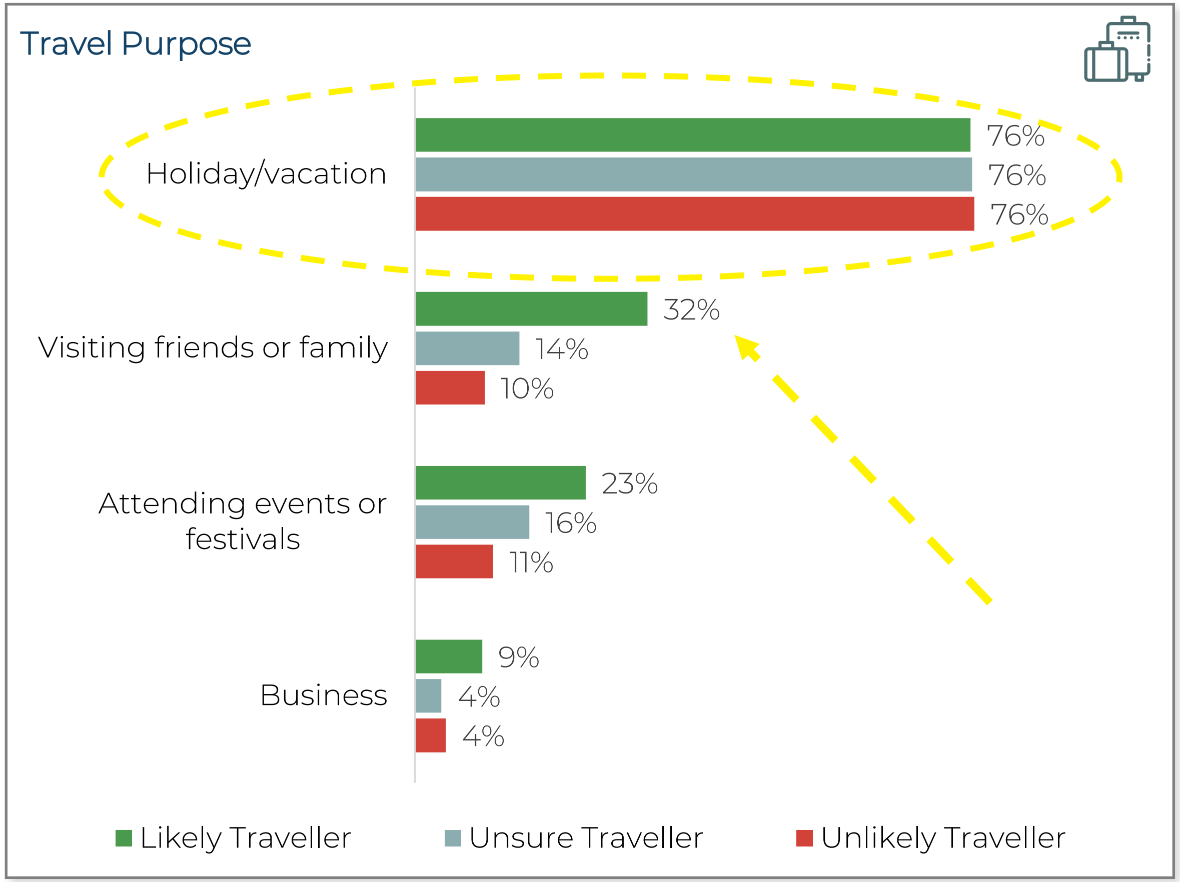


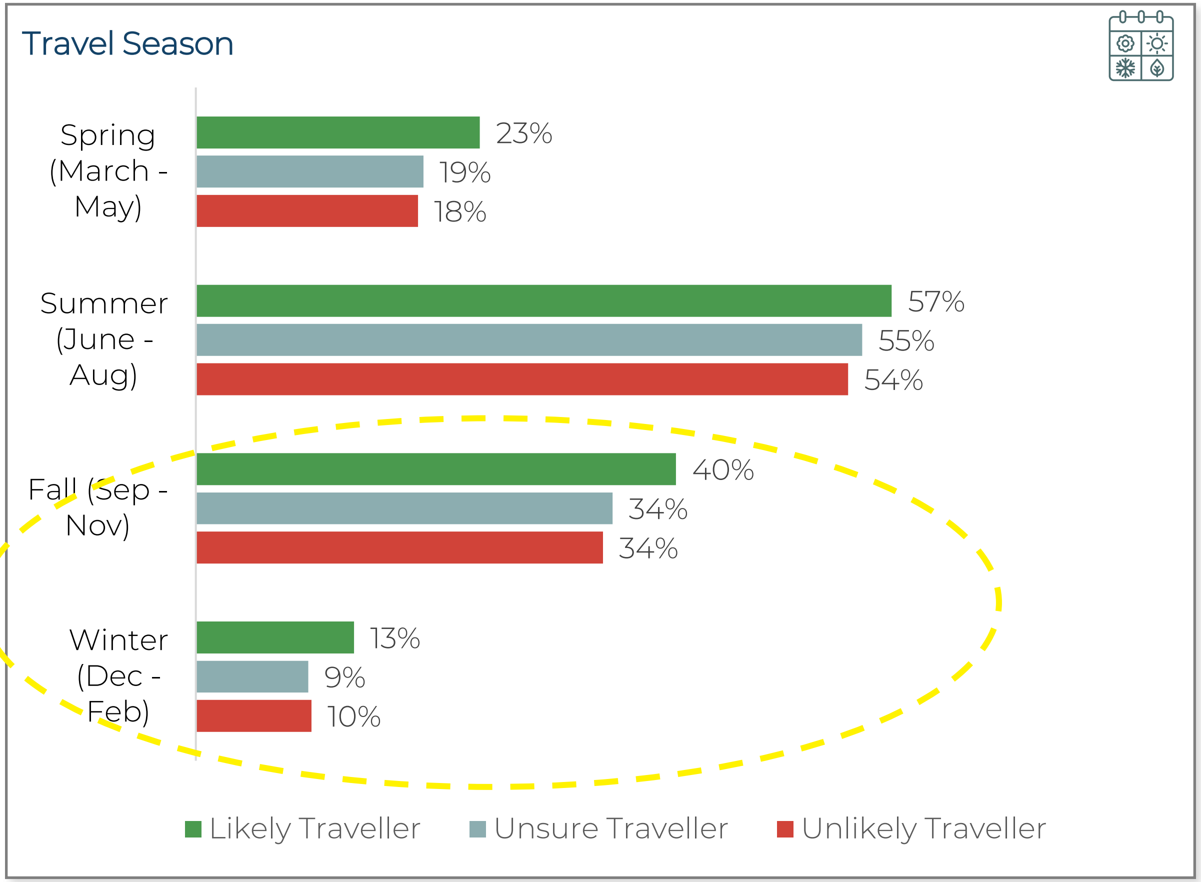
How likely are you to travel to Canada in the next 12 months?

GENERAL TRAVEL INTENTIONS

Holiday travel during the Summer or Fall are the primary drivers of visiting Canada by US travellers.

Canada Travel Purpose and Timing





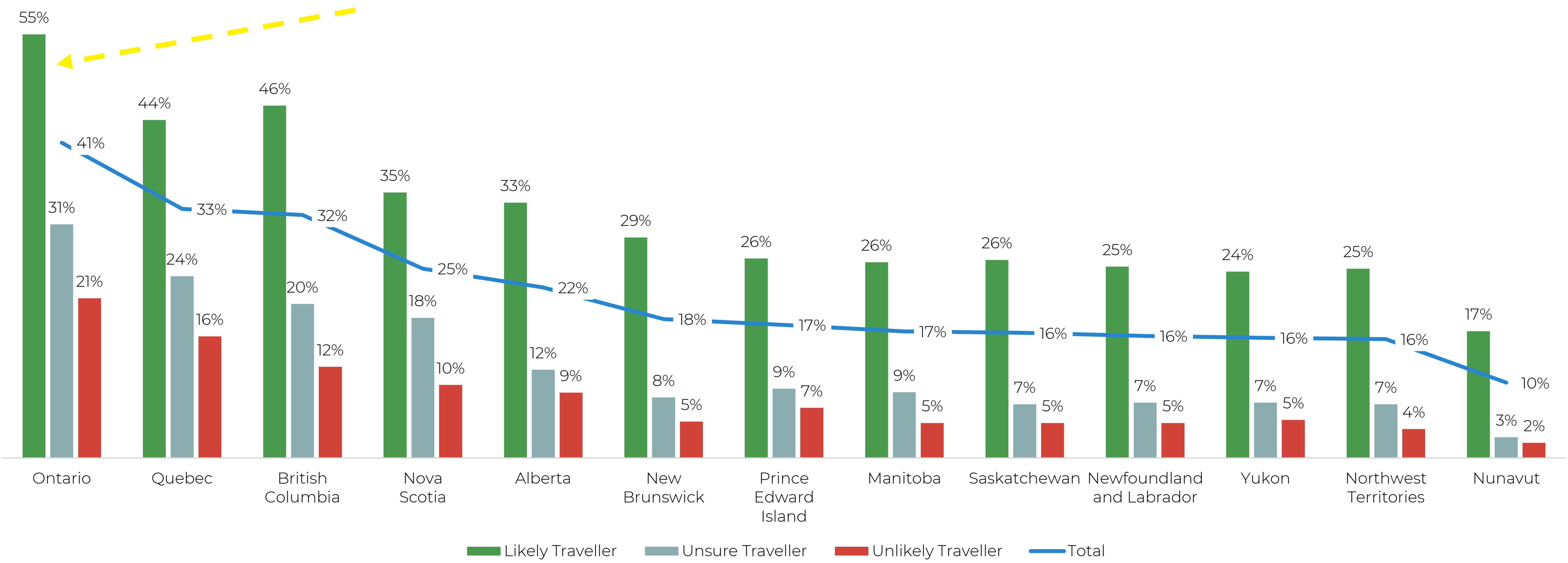
What type of travel would you be planning to Canada? (Select all that apply)
When are you most likely to travel to Canada? (Select all that apply)
How long would you likely stay in Canada for a trip?

Who would you likely travel to Canada with? (Select all that apply)
What is your estimated budget for a trip to Canada (excluding flights)?

DESTINATION FAMILIARITY

Likely travellers claim significantly higher familiarity with all Canadian provinces or territories, proving again that destination familiarity is a primary driver of travel intent.

Canadian Regional Familiarity (Top-2 Box Score)



How familiar are you with the following Canadian provinces/territories in relation to tourism?

DESTINATION FAMILIARITY

Destination familiarity is generally highest in Northeast US and lowest in the Midwest. Some exceptions are evident for more rural areas that are more familiar in the Southern US and selected regions in the West.

Canadian Regional Familiarity (Top-2 Box Score)

Low Familiarity ▬ High Familiarity

	Total	Northeast	Midwest	South	West
Ontario	41%	49%	40%	40%	37%
Quebec	33%	43%	27%	32%	31%
British Columbia	32%	27%	28%	31%	40%
Nova Scotia	25%	30%	21%	26%	22%
Alberta	22%	19%	21%	23%	25%
New Brunswick	18%	22%	14%	19%	17%
Prince Edward Island	17%	21%	15%	17%	18%
Manitoba	17%	14%	17%	18%	17%
Saskatchewan	16%	17%	15%	17%	17%
Newfoundland and Labrador	16%	18%	15%	17%	13%
Yukon	16%	15%	13%	18%	16%
Northwest Territories	16%	14%	15%	17%	16%
Nunavut	10%	12%	8%	11%	9%
Toronto	39%	48%	39%	38%	36%
Niagara	25%	32%	25%	25%	20%
Northern Ontario	16%	14%	16%	16%	15%
Southeastern Ontario	13%	14%	12%	14%	11%

How familiar are you with the following Canadian provinces/territories/sub-regions in relation to tourism?

DESTINATION FAMILIARITY

Cost of travel is a significant concern across all provinces, while the three major provinces generally have much better perceptions than the smaller territories.

Improvements required by province (Top-2 Box Score)

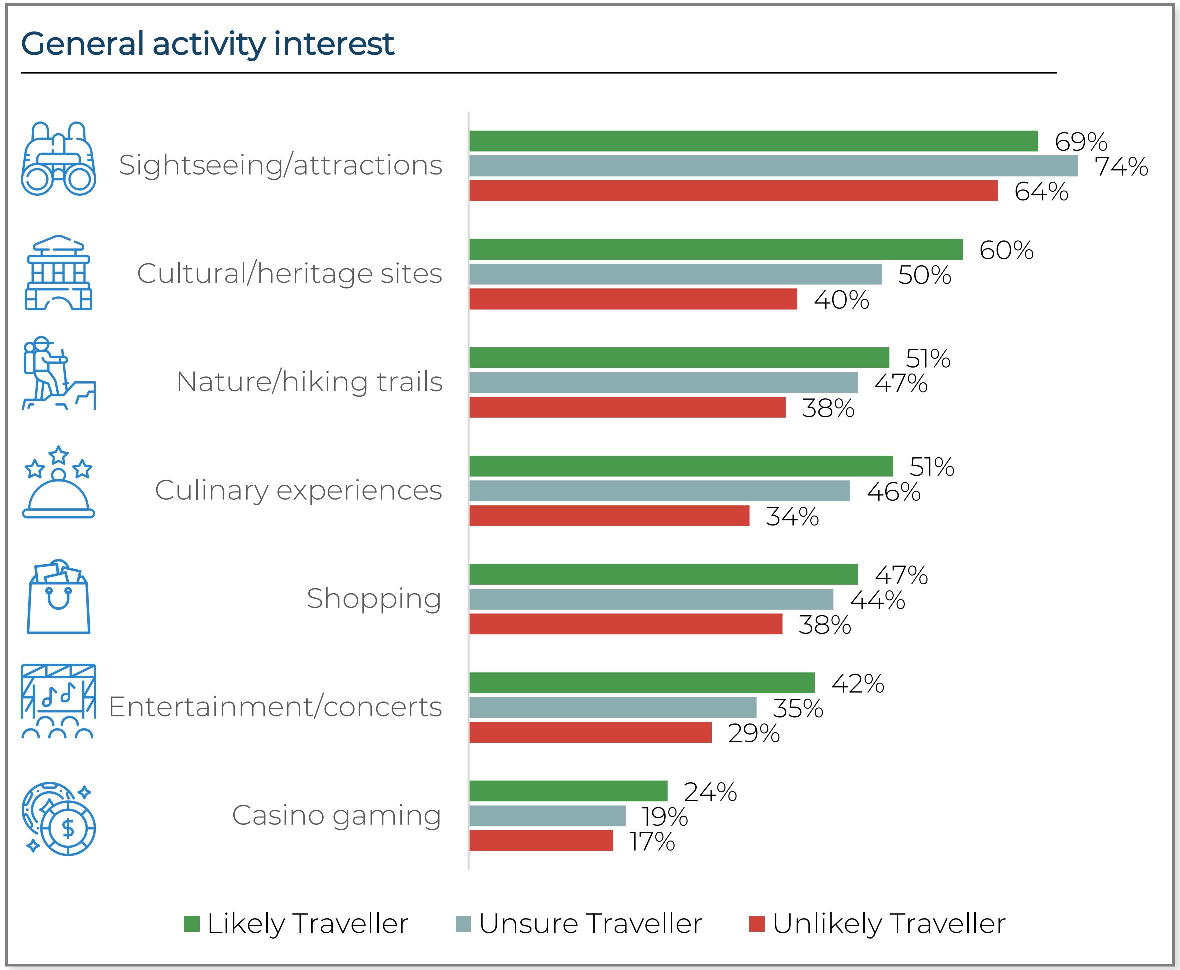
Significant Improvement Required — Little Improvement Required

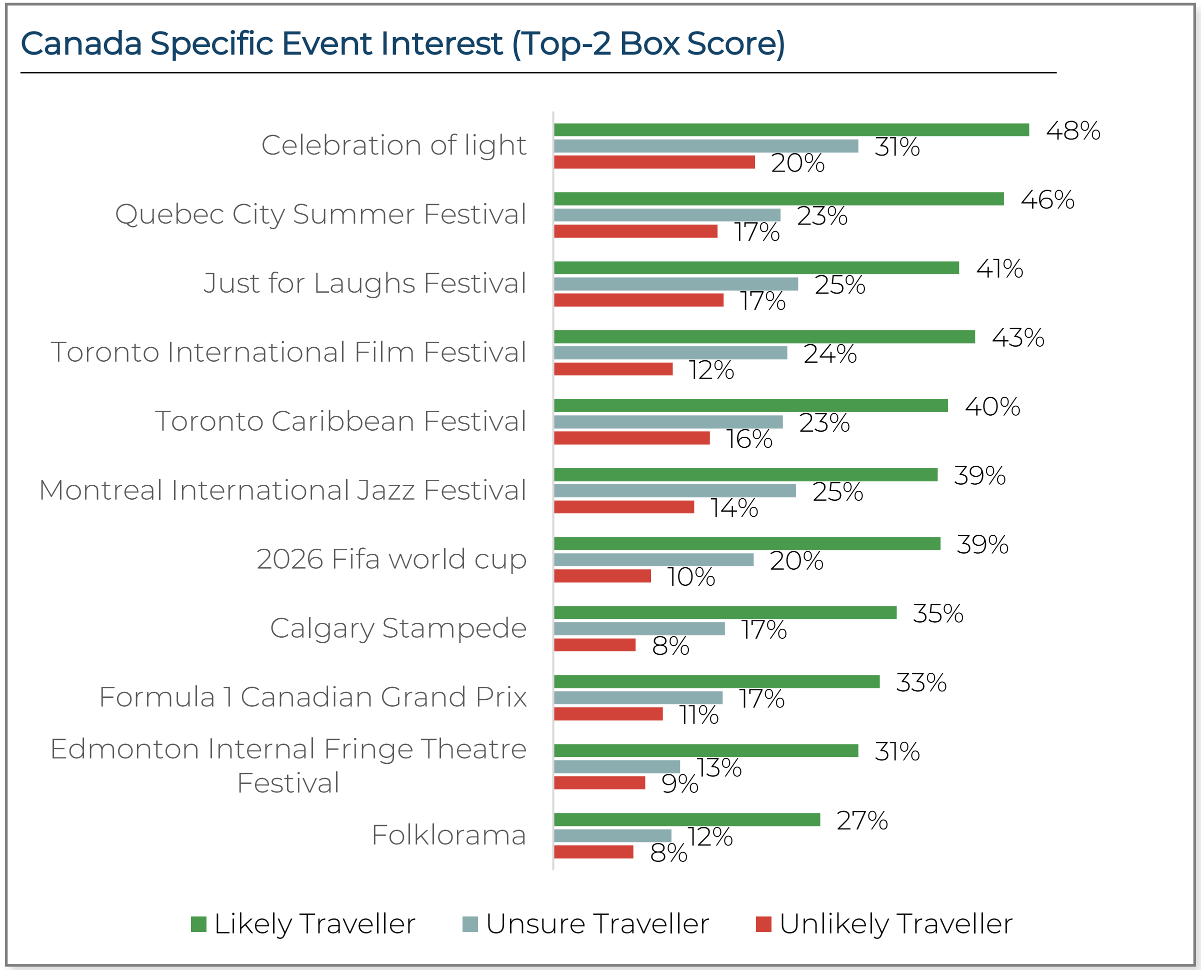
	Online travel agency representation	Accommodation and tourism packages	Cost of travel	Transportation options	Access to information	Accommodation options	Activity options	Travel Experience
Ontario	45%	43%	34%	43%	48%	46%	45%	46%
Quebec	42%	40%	33%	42%	46%	50%	47%	47%
British Columbia	41%	44%	36%	40%	41%	40%	40%	40%
Nova Scotia	32%	38%	38%	35%	34%	38%	39%	41%
Alberta	31%	34%	27%	32%	40%	38%	37%	38%
New Brunswick	31%	28%	32%	36%	39%	32%	32%	35%
Prince Edward Island	38%	39%	33%	28%	31%	31%	32%	39%
Manitoba	40%	48%	35%	34%	45%	35%	34%	48%
Saskatchewan	32%	32%	27%	36%	41%	36%	36%	32%
Newfoundland and Labrador	31%	30%	29%	27%	39%	32%	32%	34%
Yukon	33%	25%	21%	30%	30%	30%	27%	34%
Northwest Territories	29%	26%	27%	30%	31%	33%	33%	32%
Nunavut	30%	27%	37%	24%	27%	33%	23%	27%

For each province/territory that you are somewhat or very familiar with, please rate the degree of improvement required in the following areas related to tourism

TRAVEL NEEDS OF US TRAVELLERS

Sightseeing is the primary activity interest of all traveller groups and could be a lever to convert uncertain travel to likely travel.



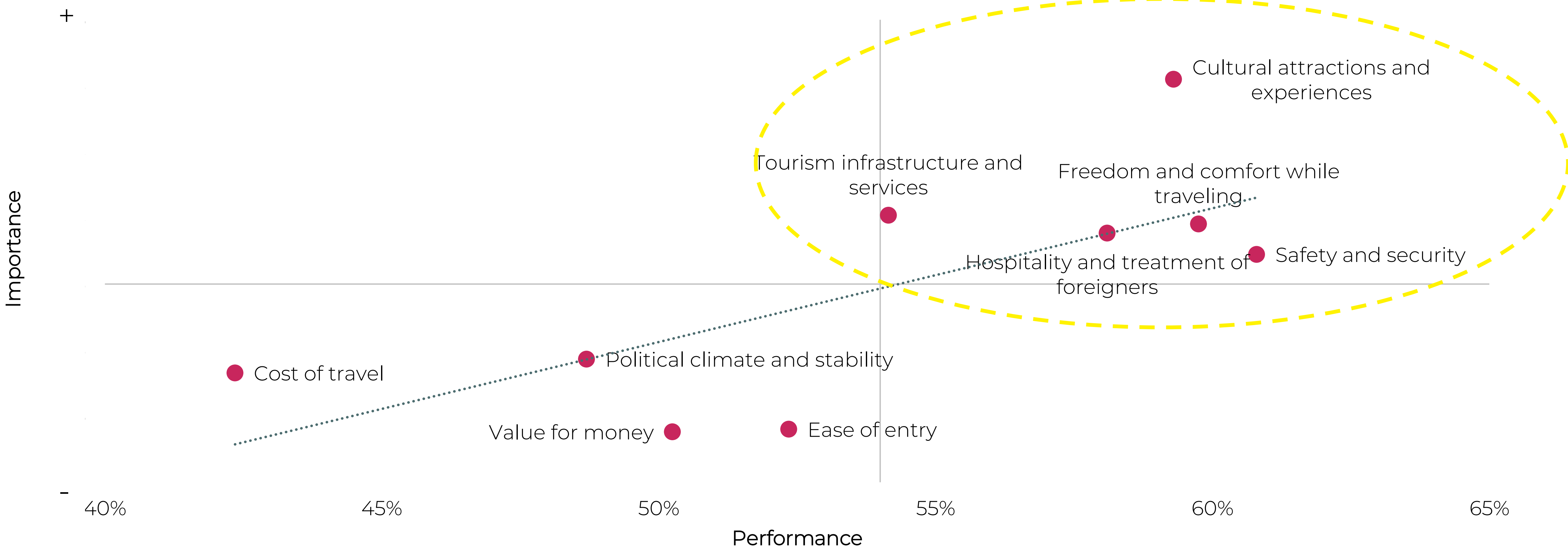


Which activities or experiences interest you most when considering visiting Canada?
How interested are you in attending the following major events in Canada?

DRIVERS OF DESTINATION APPEAL

Canada's overall appeal as a destination is strongly driven by cultural attractions, safety, and comfort. Lower performing attributes are also deemed less important – an ideal situation for the destination.

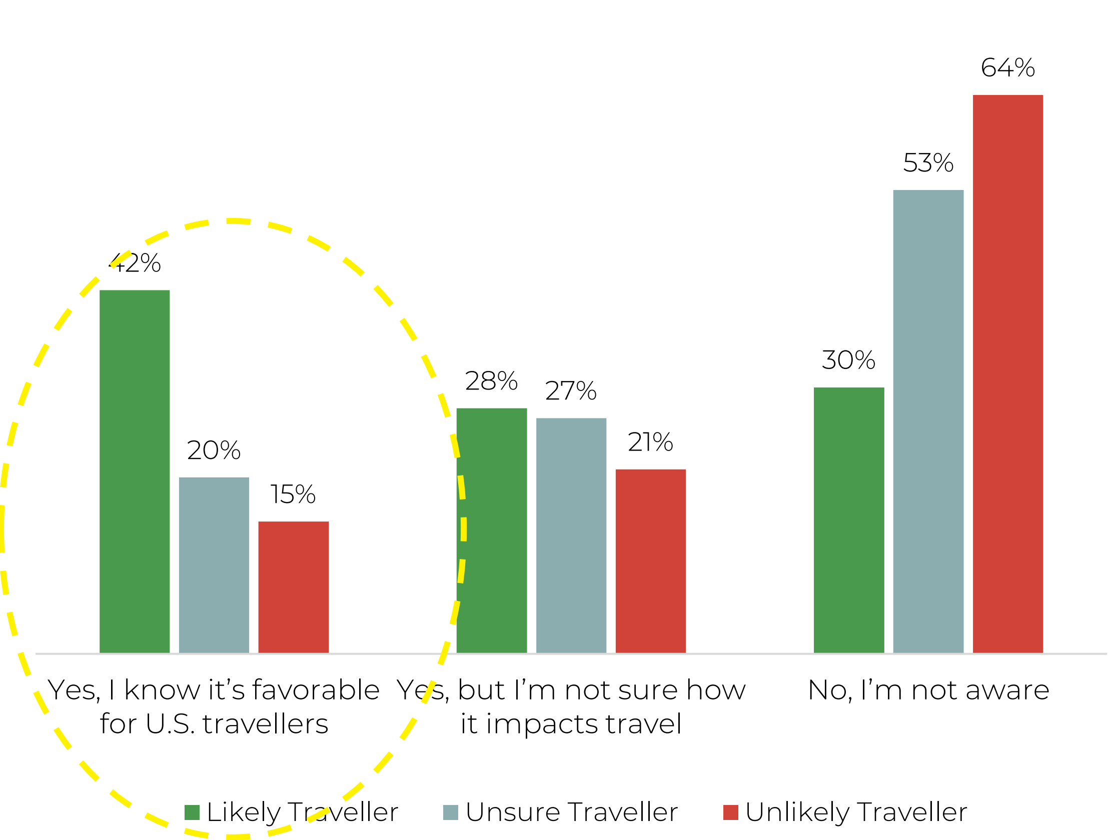
Drivers of destination appeal



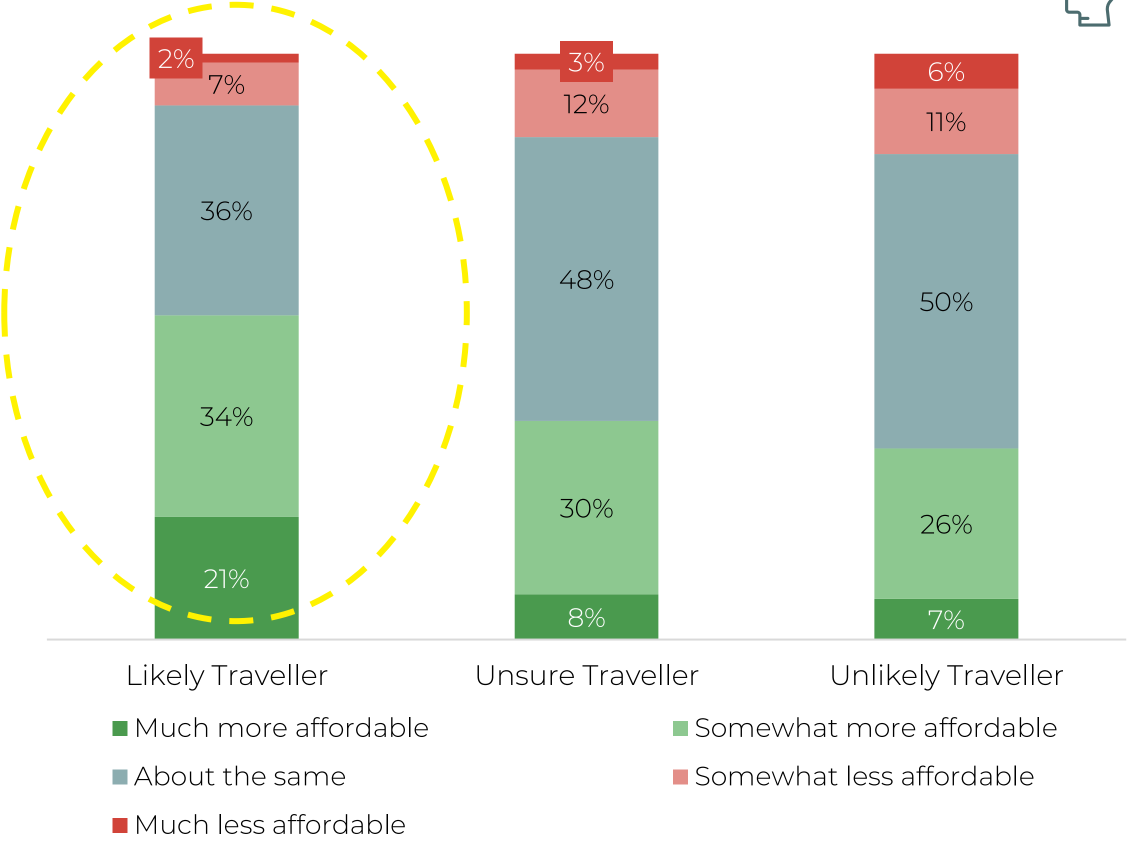
BARRIERS TO CANADIAN TRAVEL

Exchange rate impact is not well-understood and could be a lever to improve travel cost perceptions. That said, relative perceptions of the relative cost of travelling to Canada are generally positive.

Exchange rate awareness



Relative cost perceptions of travelling to Canada

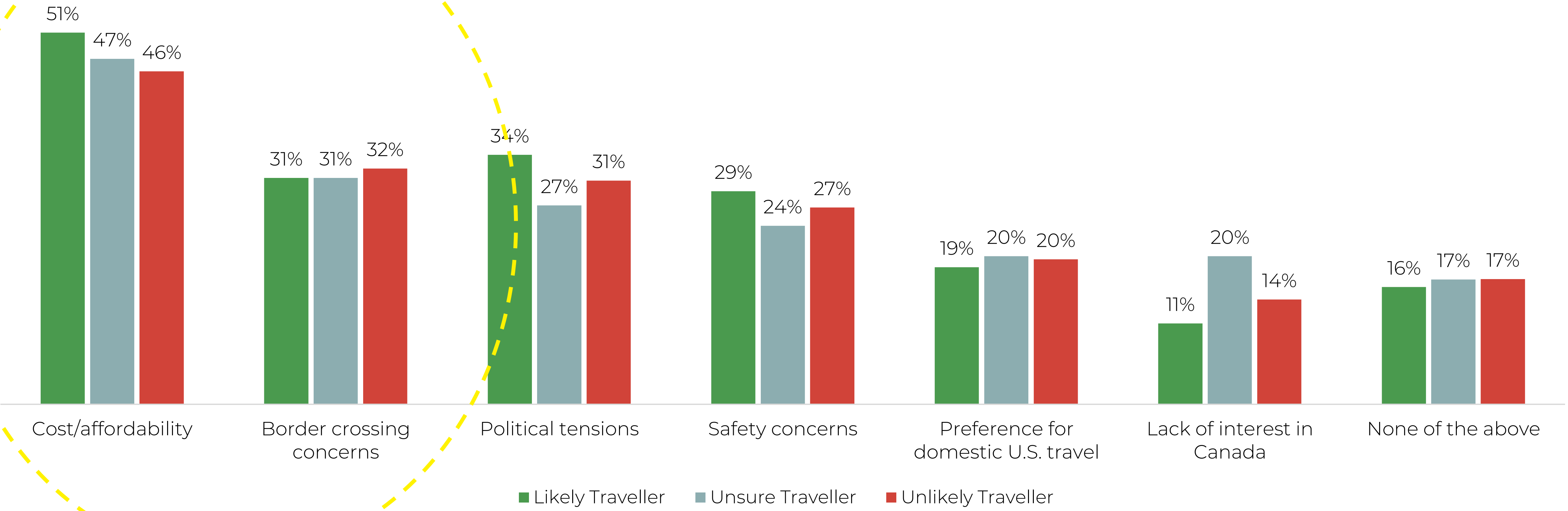


Are you aware of the current exchange rate between the U.S. dollar and the Canadian dollar?
How do you perceive the cost of traveling to Canada compared to other destinations?

BARRIERS TO CANADIAN TRAVEL

At an absolute level however, cost and affordability is seen as the primary barrier to travel, which is likely a general barrier rather than specific to the destination. Politics and safety are lower on the list of concerns.

Barriers to Canadian travel

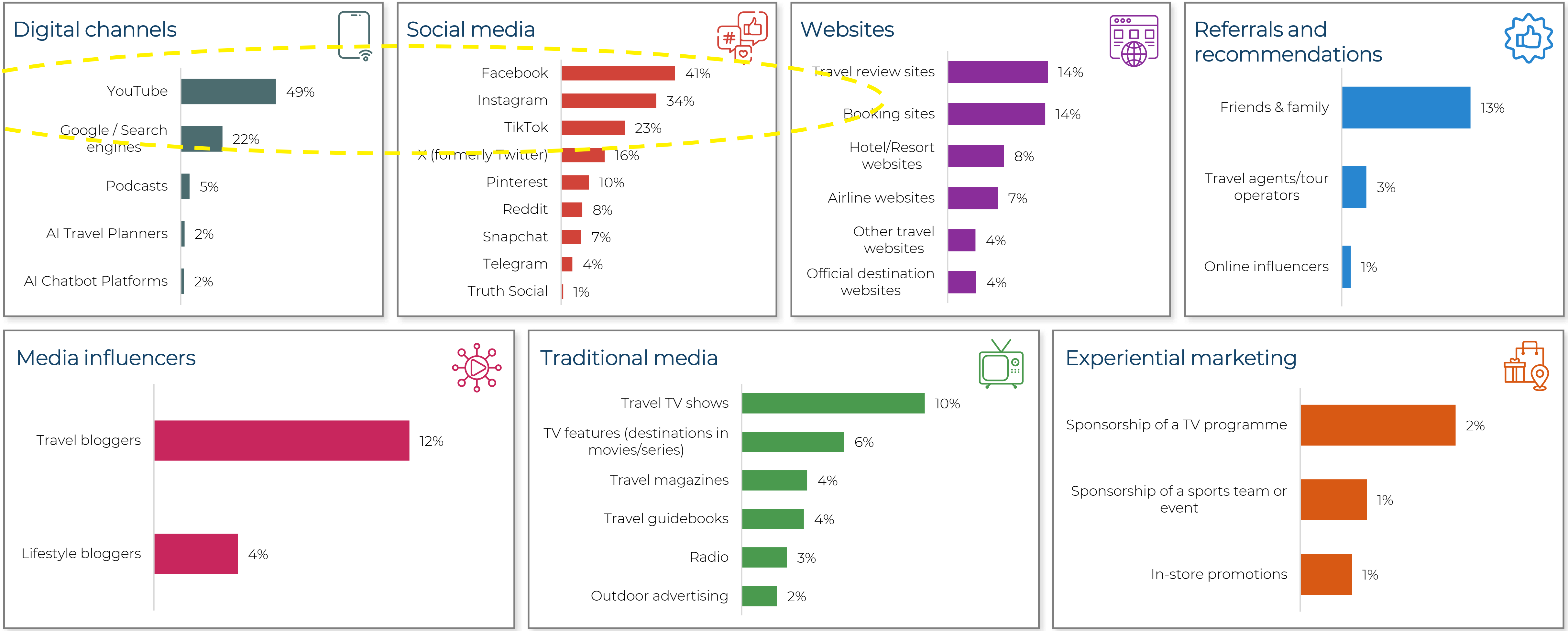


What factors, if any, might prevent you from traveling to Canada?

INFLUENCERS OF CANADIAN TRAVEL

Digital channels, in particular YouTube, are particularly important in influencing destination perceptions. Social media and search can also play an important role, while the impact of traditional media continues to wane.

Media channels influencing Canadian travel perceptions

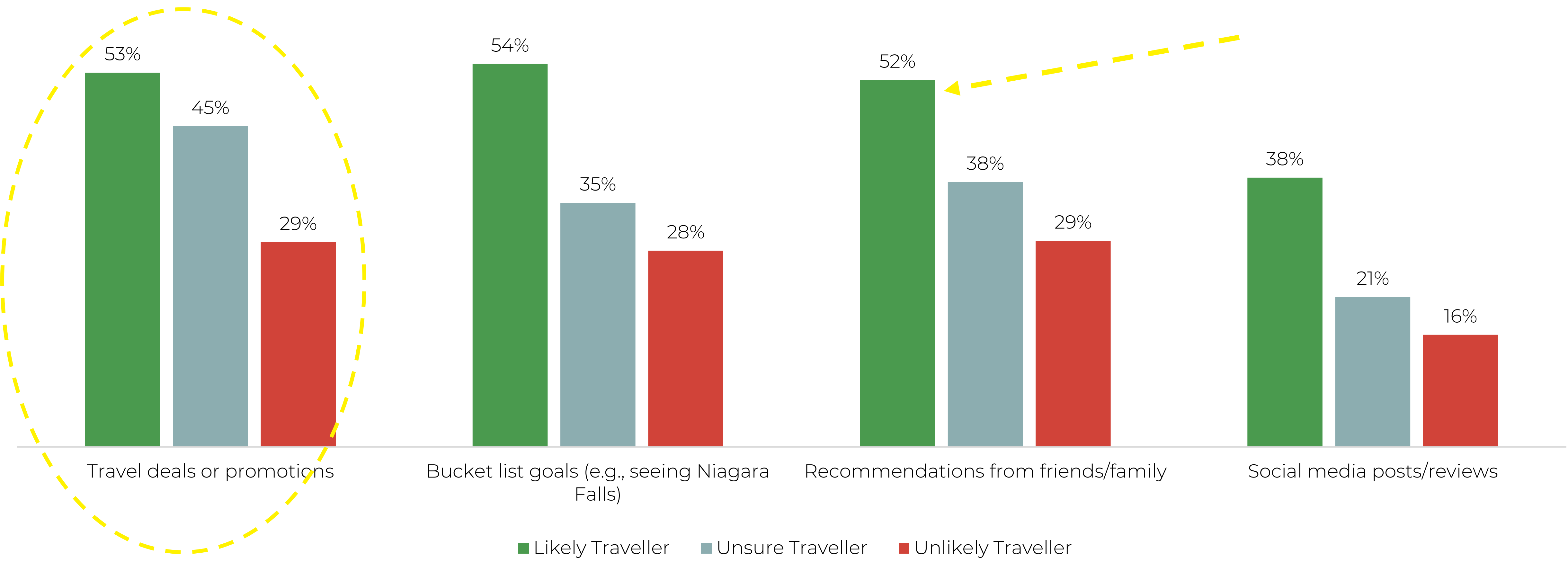


Which media channels influence your perception of Canada as a travel destination?

INFLUENCERS OF CANADIAN TRAVEL

Social media alone is however not enough of an influencer, with promotions, attractions, and word-of-mouth playing a significant role in influencing travel decisions.

Influencers of travel intentions (Top-2 Box Score)

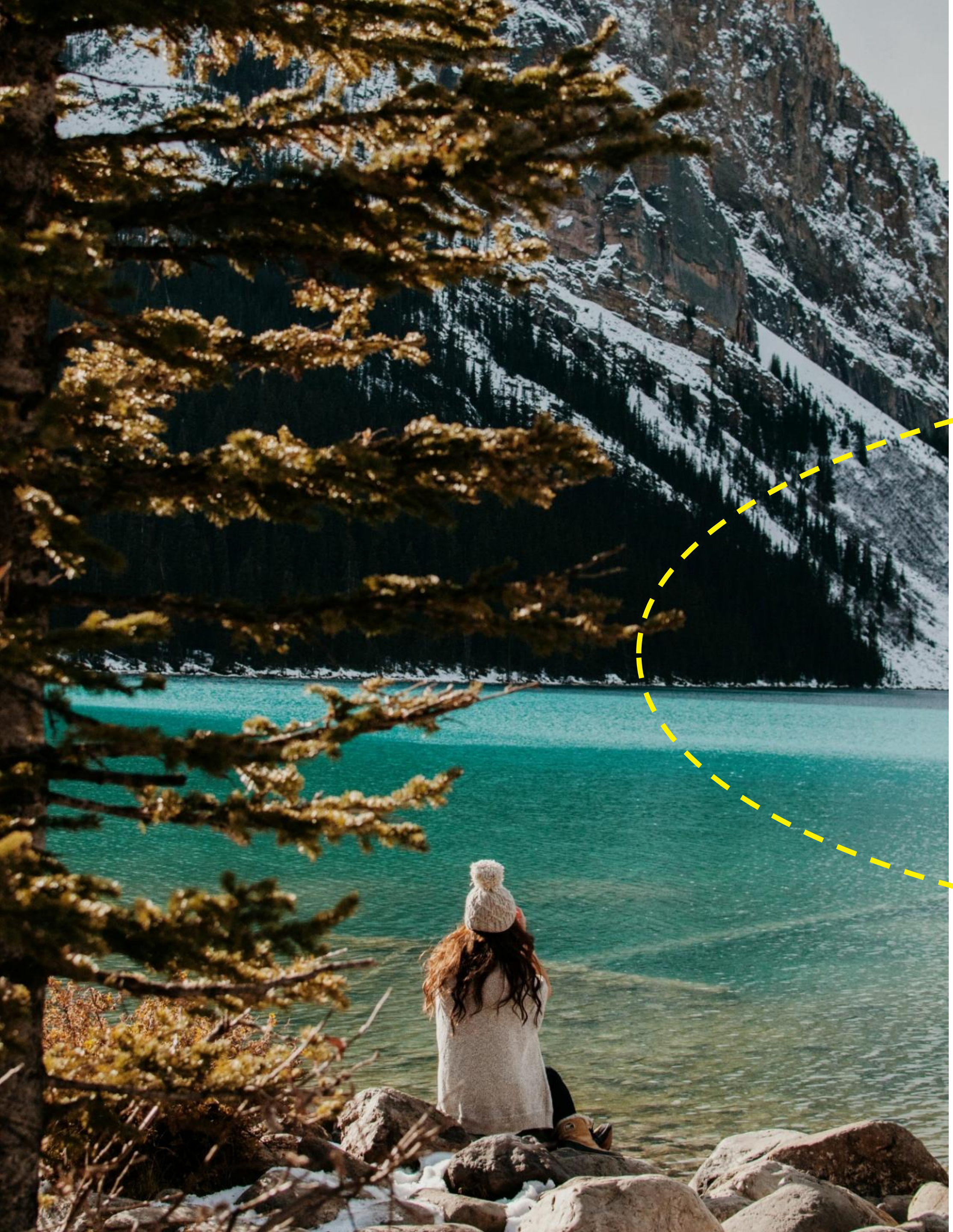


How much do the following influence your decision to travel to Canada?

STRATEGIC RECOMMENDATIONS

Recommendation 1: Seasonality and Purpose

- Winter Weak Spot: Canada still struggles with Winter appeal — US travellers overwhelmingly prefer Summer and Fall.
- Perception Problem: Fixing Winter travel intent requires a unified national push to shift attitudes and showcase Winter experiences.
- Vacation Leads: Leisure is the #1 driver — messaging should double down on vacation-focused storytelling.
- Anchor in Interests: Sightseeing, culture, hiking, and food are top draws — tailor these to regional strengths to boost awareness and consideration.
- Event Impact Is Limited: Big events help nudge likely travellers, but don't move the needle with the unsure or uninterested.



STRATEGIC RECOMMENDATIONS

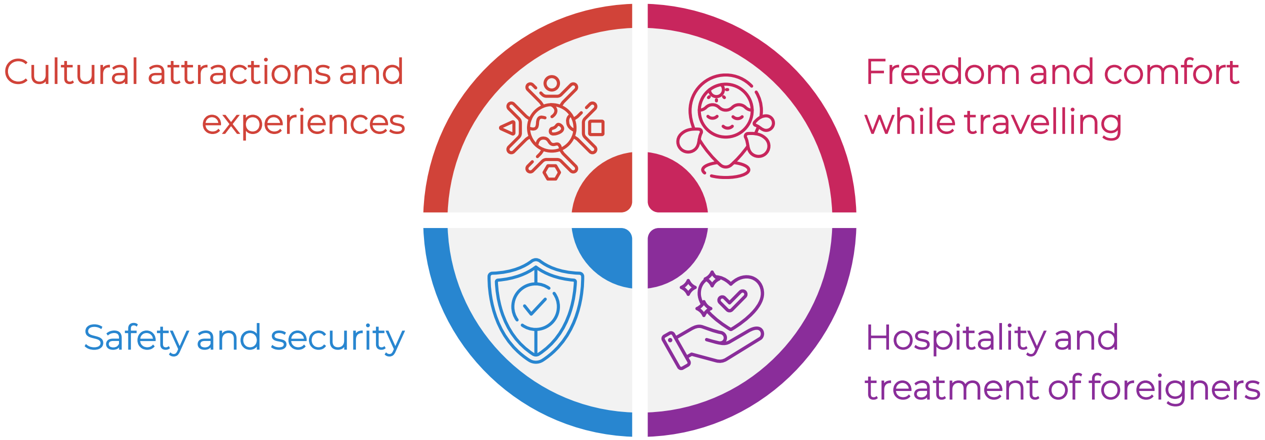
Recommendation 2: Destination Familiarity

- Familiarity Drives Intent: Lower awareness of regions = lower likelihood to travel — especially for unsure and unlikely travellers
- Awareness Alone Isn't Enough: Familiarity must be paired with messages that directly address key barriers like cost, access, and activities.
- Highlight Affordability: Travel cost remains a concern — communicate affordable options and favorable exchange rates.
- Spotlight Packages: Lack of packaged deals in remote regions like Yukon and Nunavut is a turnoff — address this through targeted promotions.
- Fix Access Perceptions: Boost confidence in transportation access for under-visited regions like PEI and Newfoundland.

STRATEGIC RECOMMENDATIONS

Recommendation 3: Leverage strengths and address barriers

- **Focus on strengths:** Overall, Canada is positioned well as a destination with important attributes performing well, and those that are performing below average being seen as less important. Ongoing positioning communication that highlights key strengths will serve to further entrench the destination's appeal:



- With cost of travel being an ever-present barrier, it is important to highlight things that offset this like exchange rate favourability and parity with travel costs to other destinations. Combining this with proximity and range of activities can improve consideration of Canada over other potential destinations.

STRATEGIC RECOMMENDATIONS

Recommendation 4: Digital First with Incentives

- **Digital video** (YouTube), **social media**, and **search** are the primary channels of influence for US travellers.
- A **digitally led communication strategy** with a focus on video content should therefore be the leading marketing approach, supported by enticing social media content.
- A combination of **organic and promoted content is recommended**, with promoted content focussing on top-of-the-funnel messaging (awareness, familiarity, high-level activity awareness, drivers of appeal) and organic content focussed more on improving destination knowledge (detailed destination attractions and sub-regional familiarity).
- It is important to indicate the **"reason to believe"** across these communications by supporting it with promotional offers, appealing to travel motivators (e.g. bucket list goals), or utilising testimonials to mimic word-of-mouth recommendations.

DEFINING THE FUTURE OF SUSTAINABLE TOURISM IN CANADA.

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