



Oh Canada!

Staying in tune with the Neighbo(u)rs to the North

May/June Reporting

rovetmarketing.ca
July 2025

rove[™]

Canadian perspective...

Trends show continued emphasis on decline in visitation to US

Month	Tone	Themes	Media Focus
February 2025	Emotional, reactive, and nationalistic	- Widespread backlash to U.S. tariffs and annexation rhetoric. - Calls for boycotts of U.S. travel and goods. - Symbolic protests (e.g., “Canadiano”).	Highlighting public anger, political tensions, and immediate travel declines.
March 2025	Defensive and cautious	- Canadian travel media paused U.S. coverage. - Tourism boards and editors reassessed messaging. - Forecasts of sustained travel decline.	Cultural and emotional fatigue; protecting Canadian identity and values.
April 2025	Analytical and policy-focused	- Continued travel decline during peak periods. - New U.S. entry/exit rules - Focus on long-term economic and diplomatic implications	Data-driven reporting and structural analysis of cross-border friction.
May 2025	Diplomatic, cautiously optimistic, yet skeptical	- Snowbird act to increase stay without a Visa - U.S. senators visited Ottawa. - U.S. States launched campaigns to woo Canadians. - U.S. Court strikes tariffs but then there is an appeal	Trying for repair efforts, economic pragmatism, and mixed public sentiment.
June 2023	Critical, reflective	- Sustained tourism to US decline emphasized - Continued diplomacy with US win back marketing efforts - Resilience of Canadian domestic tourism – Canada Strong Pass, positive domestic shift - Tariff talks/threats persist acting as a reminder for sentiment	Analytical and skeptical, questioning long-term viability

In the news...

Canadian media narratives

The Canada Strong Pass is now available – free admission to parks, museums, campgrounds.

Canadian campers are going 'elbows up' and staying north of the border amid U.S. trade war

Trump is ending trade talks with Canada

We are not in normal times

Canadian trips back from the U.S. plummet again amid trade war: StatCan

The U.S. boycott remains strong. Why many Canadians are digging in their heels

Tourism industry responds examples

Maine governor wants N.B. tourists back, but premier says major 'change' needed

Opinion: From Plattsburgh, a message of support, affection and gratitude

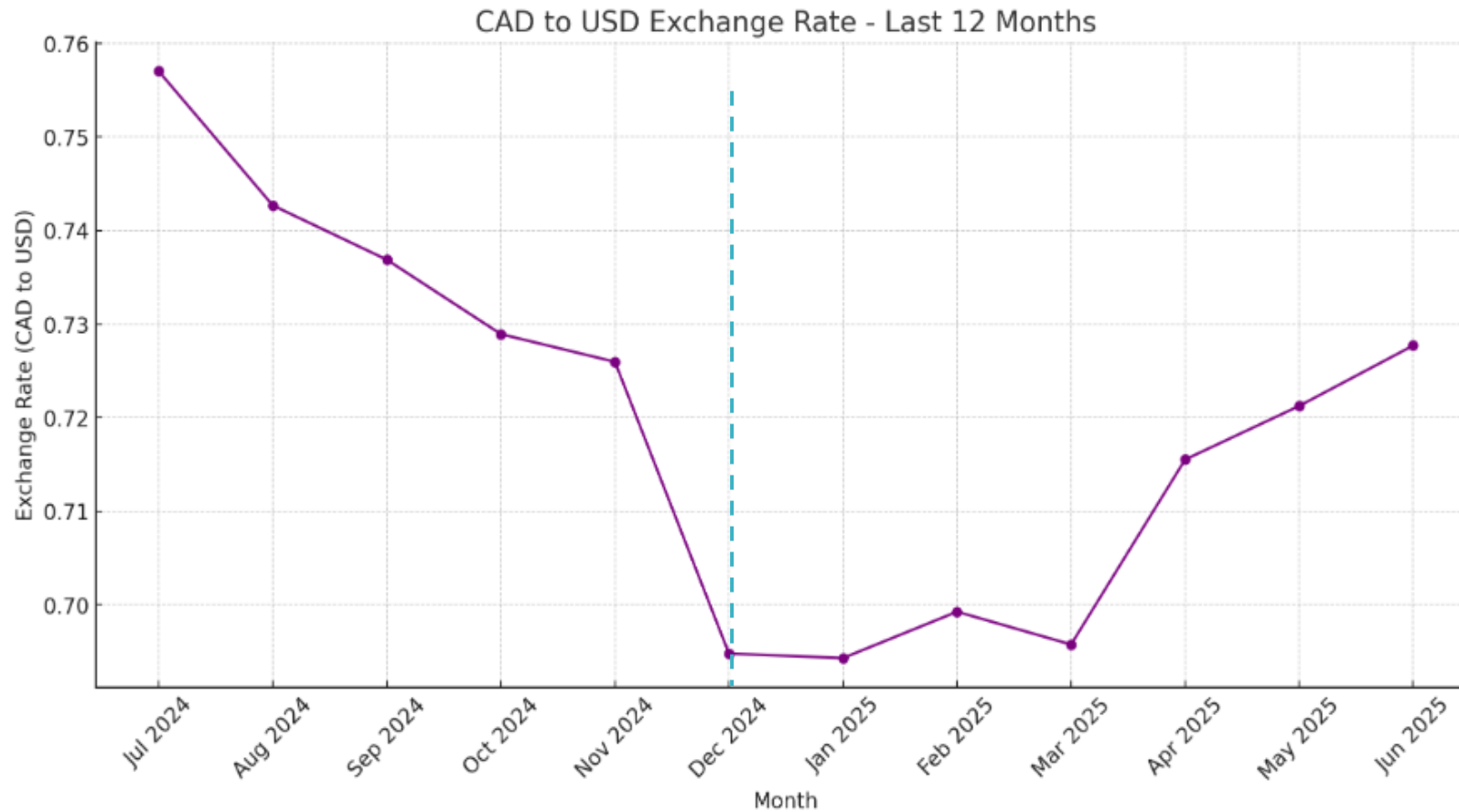
Northern U.S. states try to woo travellers with 'Canadians-only' deals amid faltering cross-border tourism

'A very emotional thing': U.S. resort owners try to win back Canadians

Fewer Americans are visiting Canada. Ad campaigns assure them they're welcome here



Canadian \$ continues to rise

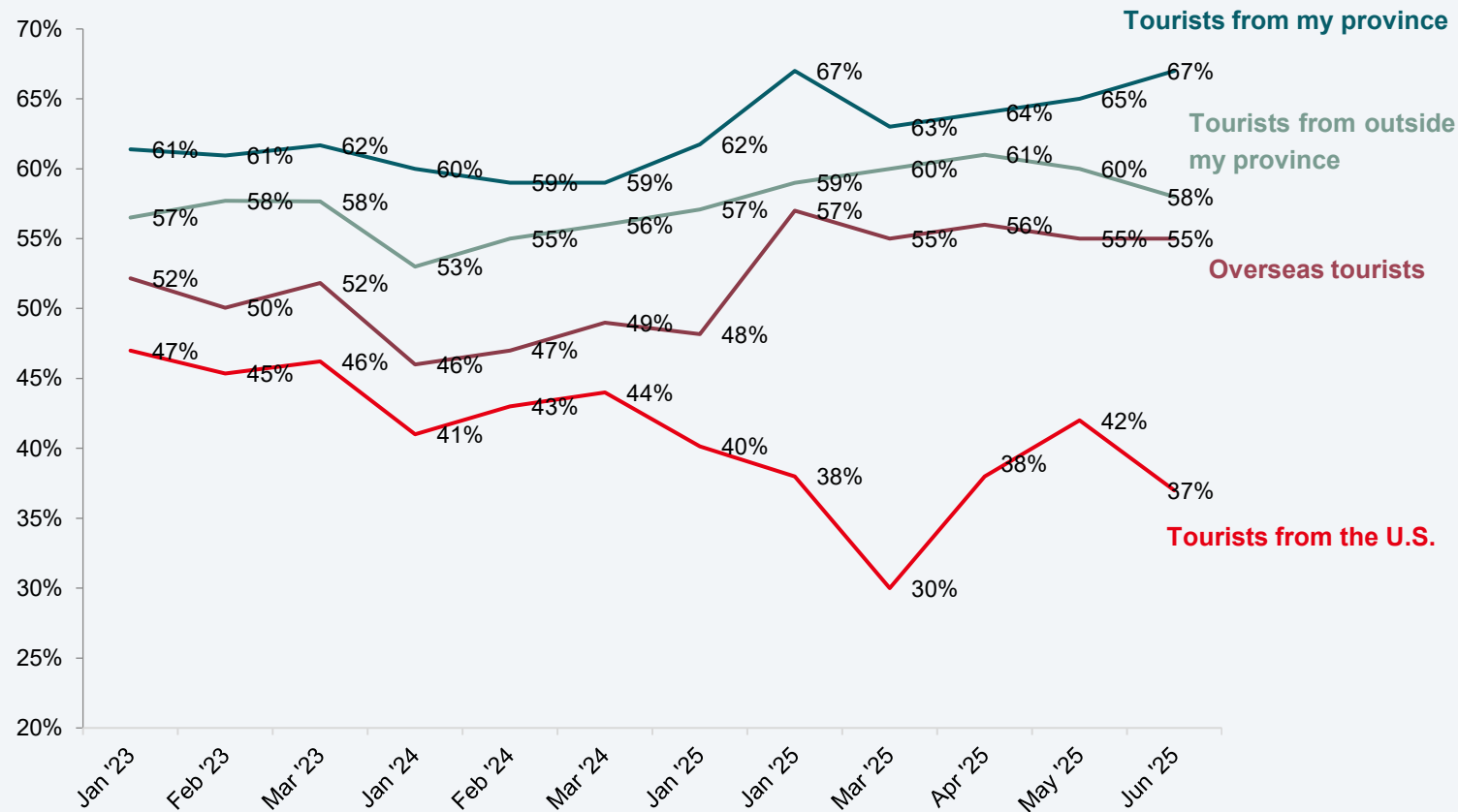


Source: Bank of Canada



U.S. still least desired tourism inbound market but improved after hitting a low in March 2025

Question: In your opinion, should Canada attract more of the following types of visitors in the future?



U.S. tourists have historically been the least desired, and deteriorating international relations may further this sentiment

Canadian Travel Sentiment – June Reporting

[Full Report Link: Travel Trends and Intentions Survey Report](#)

U.S.-Bound Travel Declines Sharply:

- Only **10%** of Canadians plan to visit the U.S. this summer (down from **23%** in 2024)
- Main deterrents: **tariffs (64%)**, **political tensions (61%)**, **safety concerns (47%)**, **poor exchange rate (46%)**, **not feeling welcome (44%)**, and **border delays (40%)**

Domestic Travel Surges:

- **77%** plan to travel within Canada (up from **69%** in 2024)
- Travel within home province: **48%** (up from **38%** pre-tariffs)
- Travel to other provinces: **42%** (up from **30%** pre-tariffs)
- **Atlantic Canadians** lead in domestic travel intent (**94%**), especially for out-of-province trips (**60%**)

Regional Differences in U.S. Travel:

- **Albertans** are the most likely to maintain U.S. travel plans (**44%** of those with bookings)
- Some Canadians still plan to go to the US - motivations include:
 - Desire to visit the destination (**43%**)
 - Feeling unaffected by politics (**41%**)
 - Visiting family/friends (**27%**)

Canadian Travel Sentiment – June Reporting

Key Recommendations for U.S. Tourism Operators

Rebuild Trust with Canadians:

- U.S.-bound travel is declining due to safety concerns, political tensions, and feeling unwelcome. Reassure travellers with messaging focused on hospitality, inclusivity, and ease of entry. Emphasize that most Americans are welcoming to Canadians.

Target More Open Segments:

- Focus efforts on men, younger travellers, and Albertans, groups still receptive to U.S. travel, by highlighting key motivators such as visiting family, attending sports events, and shopping.

United States perspective...

US news updates...

Dollar firms against peers as investors brace for Trump tariff deadline

[Canadian Boycott Of U.S. Travel Is Going Stronger Than Ever, New Data Says](#)

[Deep Dive: Destination Anywhere \(But the US\) ...](#)

[Fewer Americans are visiting Canada. Ad campaigns assure them they're welcome here | CBC News](#)

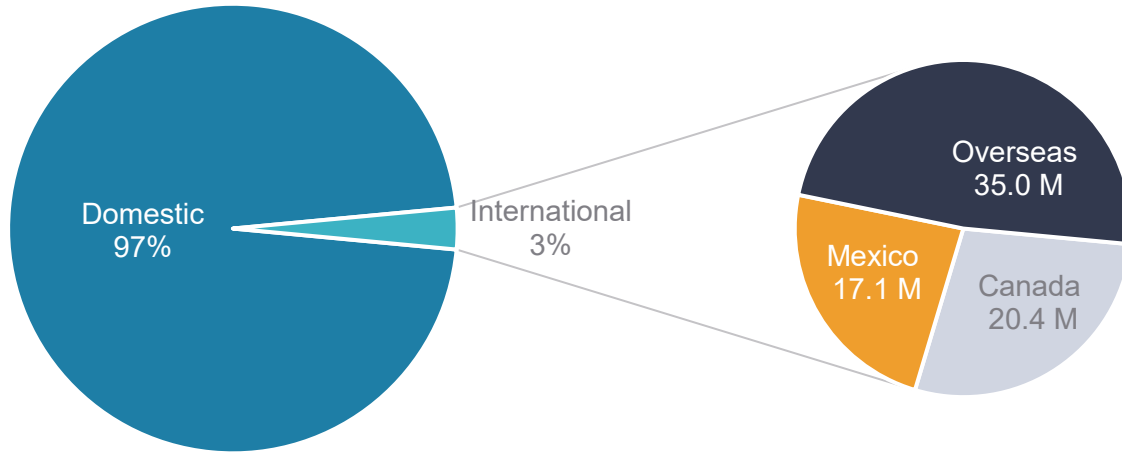
Why Tour Operators Are Embracing Domestic Travel for Summer 2025 & Beyond

Air travel hits new milestone with 6 record days in 2025 -- and July Fourth surge expected ahead

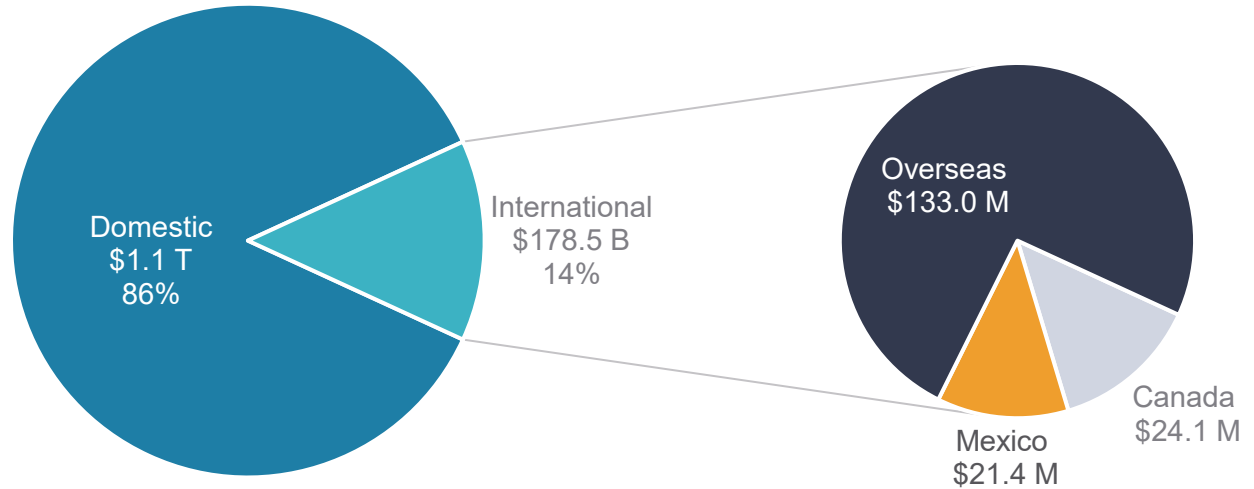
It's a sign of "how well the economy is doing," a former TSA official says.

International – 3% of Total Trips and 14% of Spend

Total U.S. Trips
2.4 Billion (2024)



Total Visitor Spending
\$1.3 Trillion (2024)



Domestic travellers remain a strong market

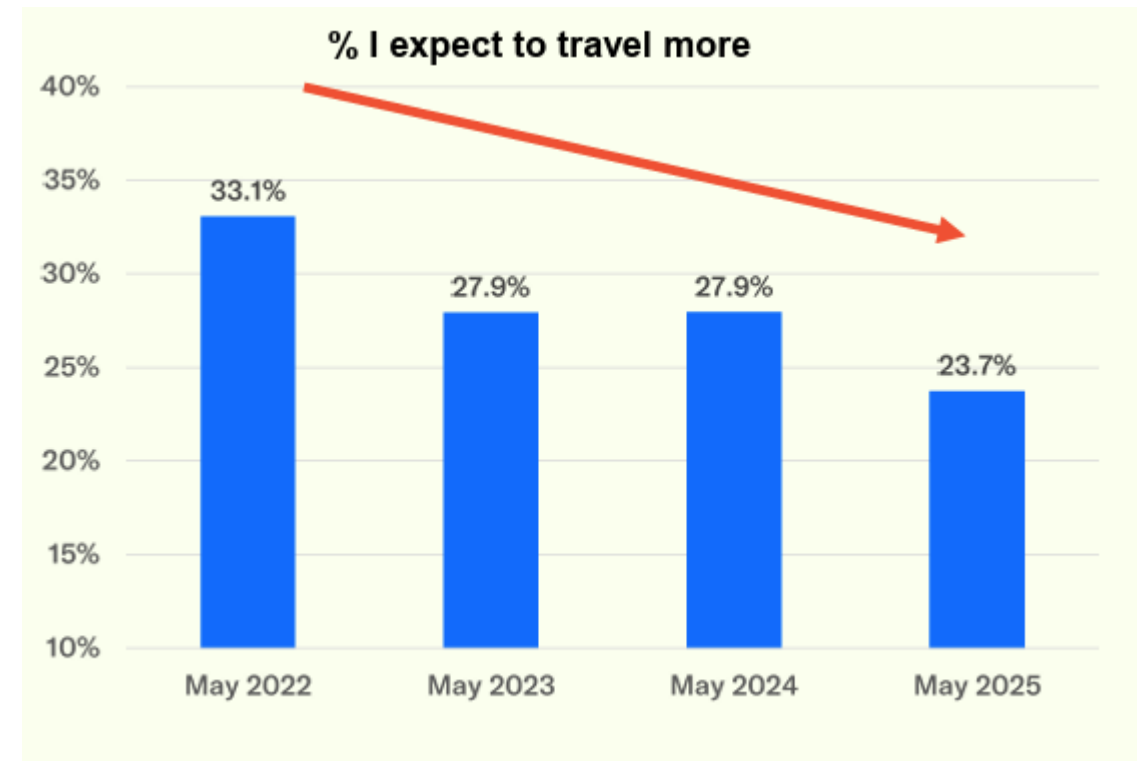
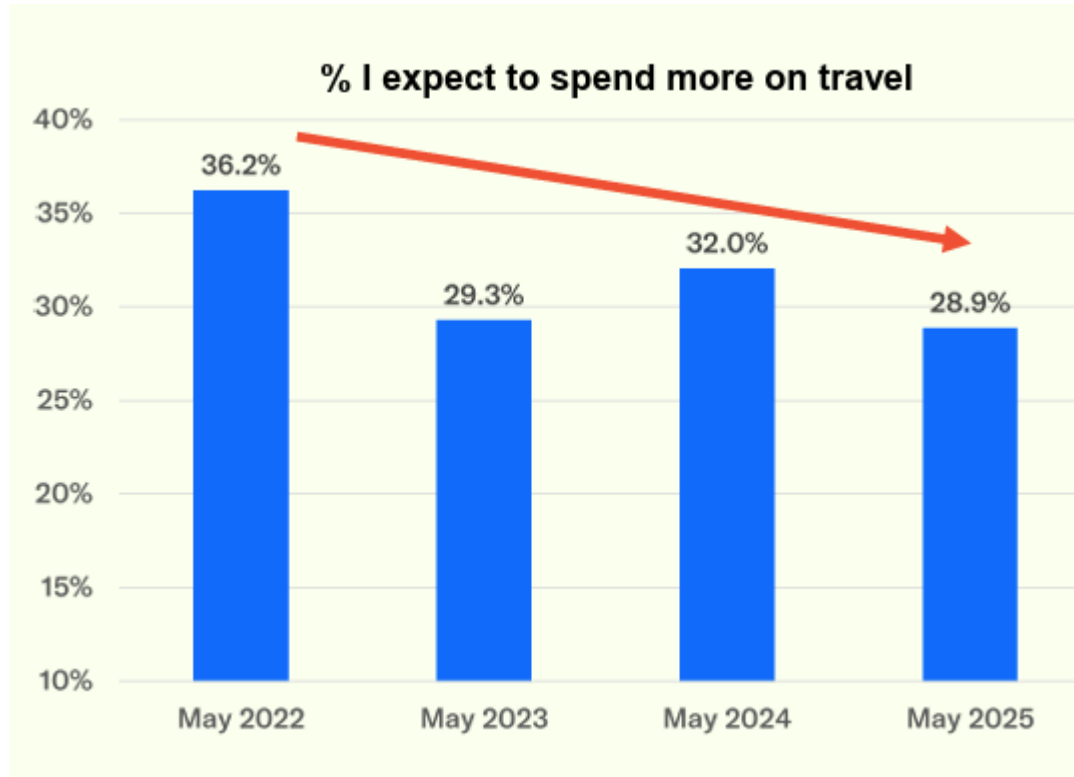
Nearly 87 percent of travelers have at least one trip on the books right now.

Question: *In which months do you currently have any leisure trips planned (even if only tentatively)?*



86.5%
have at least one trip
currently planned

Domestic travel remains strong but travel spend and trip expectations are softening



Shifting travel behaviors due to economic concerns

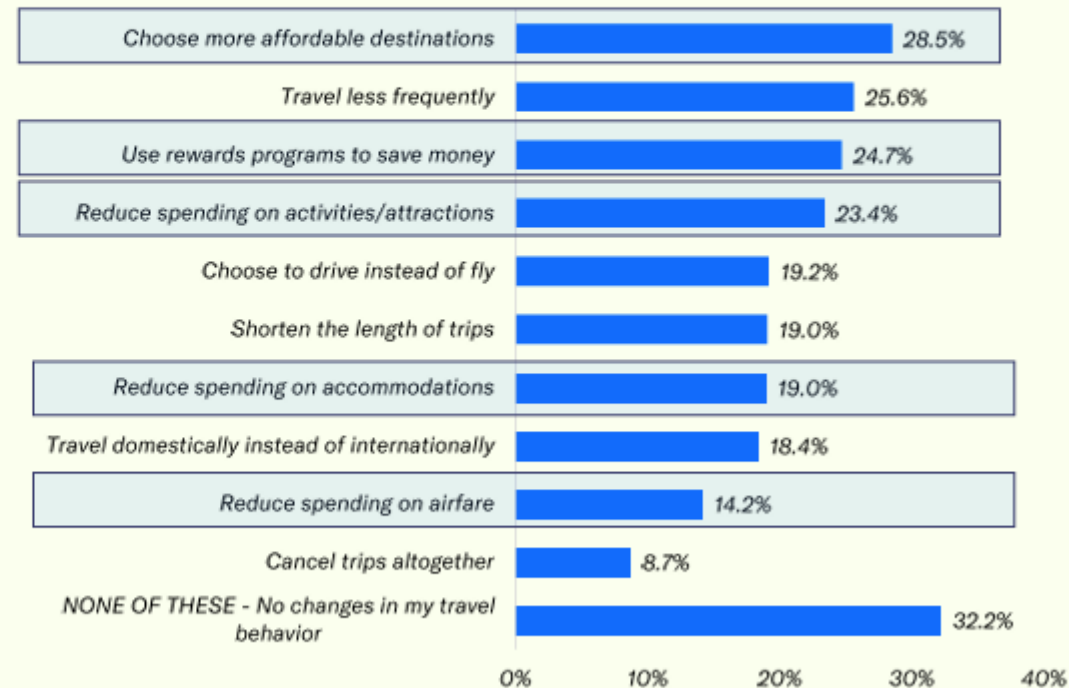
71% of travelers expects to be using one of these (in the next 6 months) to deal with economic concerns.

54.4%
(one of these)

Question:

Have concerns about the economy led you to change your thinking about travel or travel plans for the NEXT SIX (6) MONTHS? If so, please describe how below.

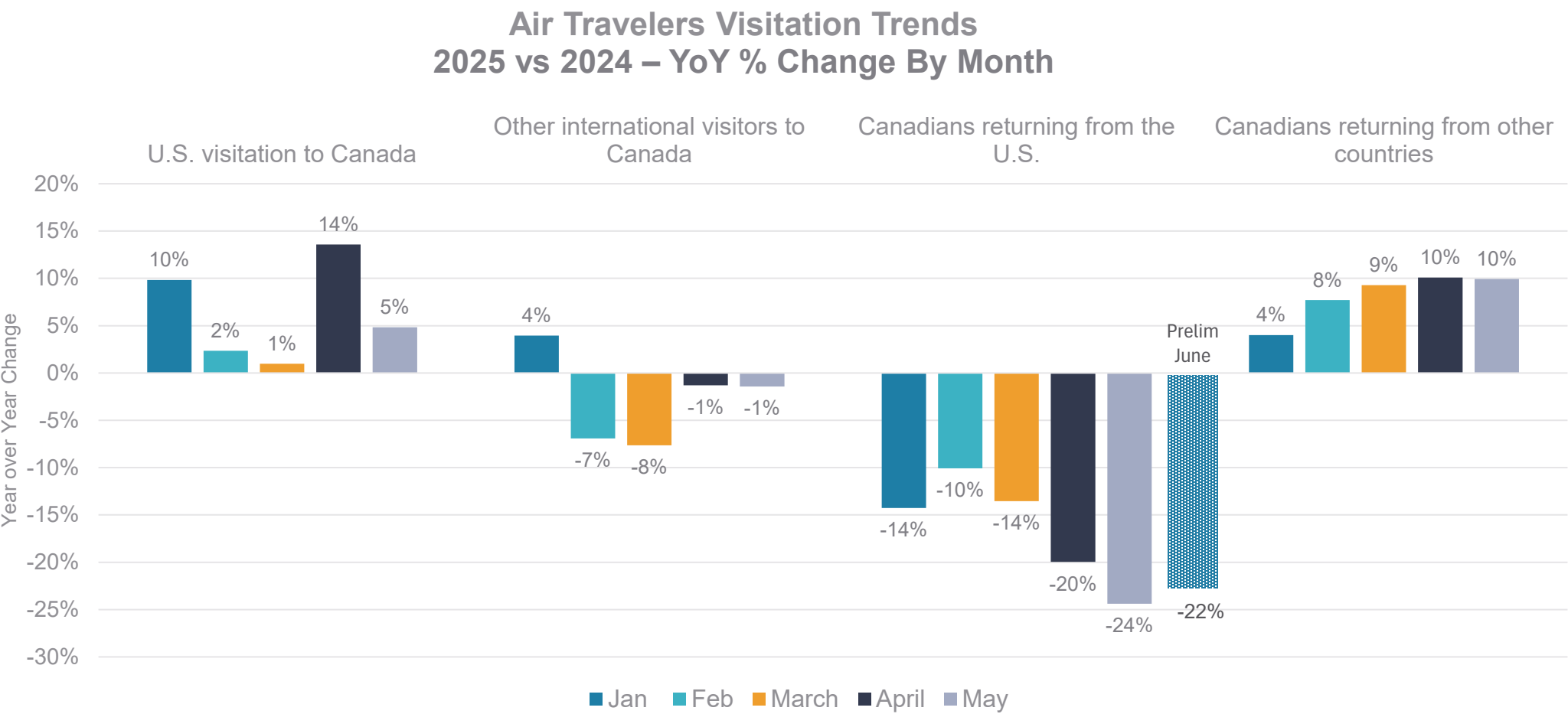
Due specifically to concerns about the economy, I expect to



Traveler trends

Air traveler trends

Decrease in Canadians returning from the U.S

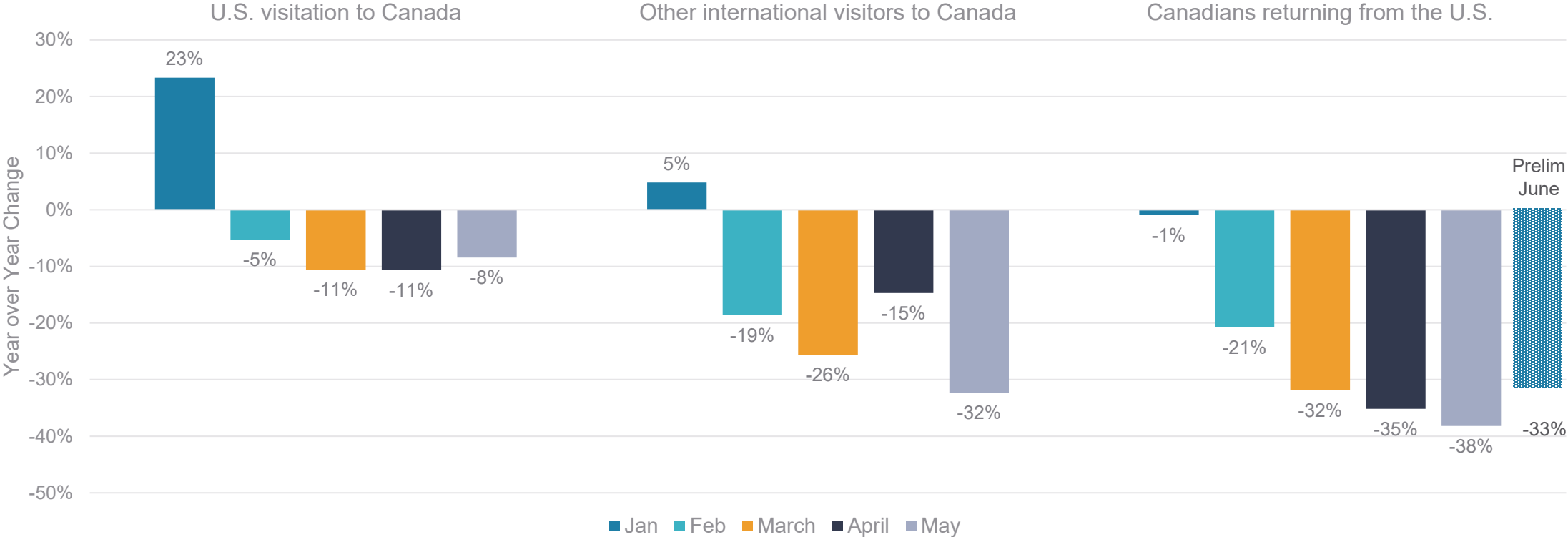


Source StatsCanada

Auto traveler trends

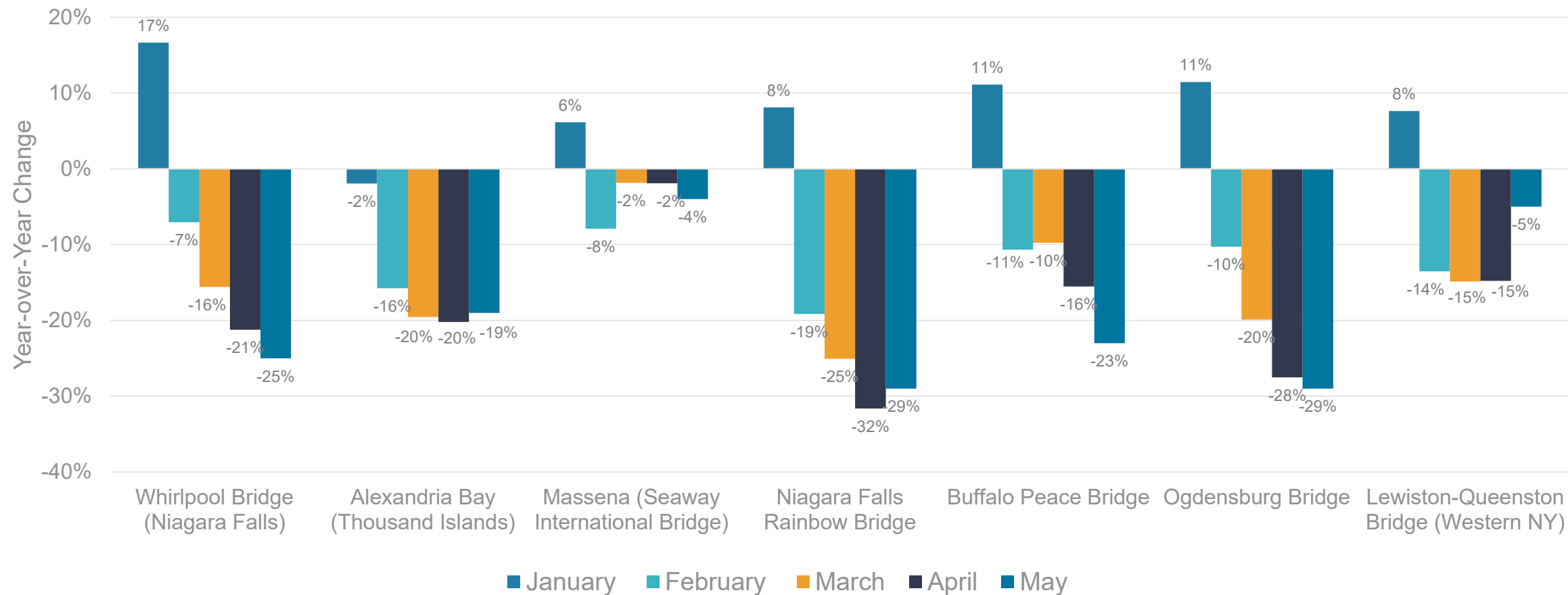
Decrease in Canadians returning from the U.S

Auto Travelers Visitation Trends
2025 vs 2024 – YoY % Change By Month



Auto traveler trends

Border Traffic (all types) Trend
2025 vs 2024 % Change



Note: Need to factor in that Easter was in March in 2024 and Eclipse was in April 2024
Source: Bridge and Tunnel Operators Association (BTOA)

Accommodation trends



AIRDNA

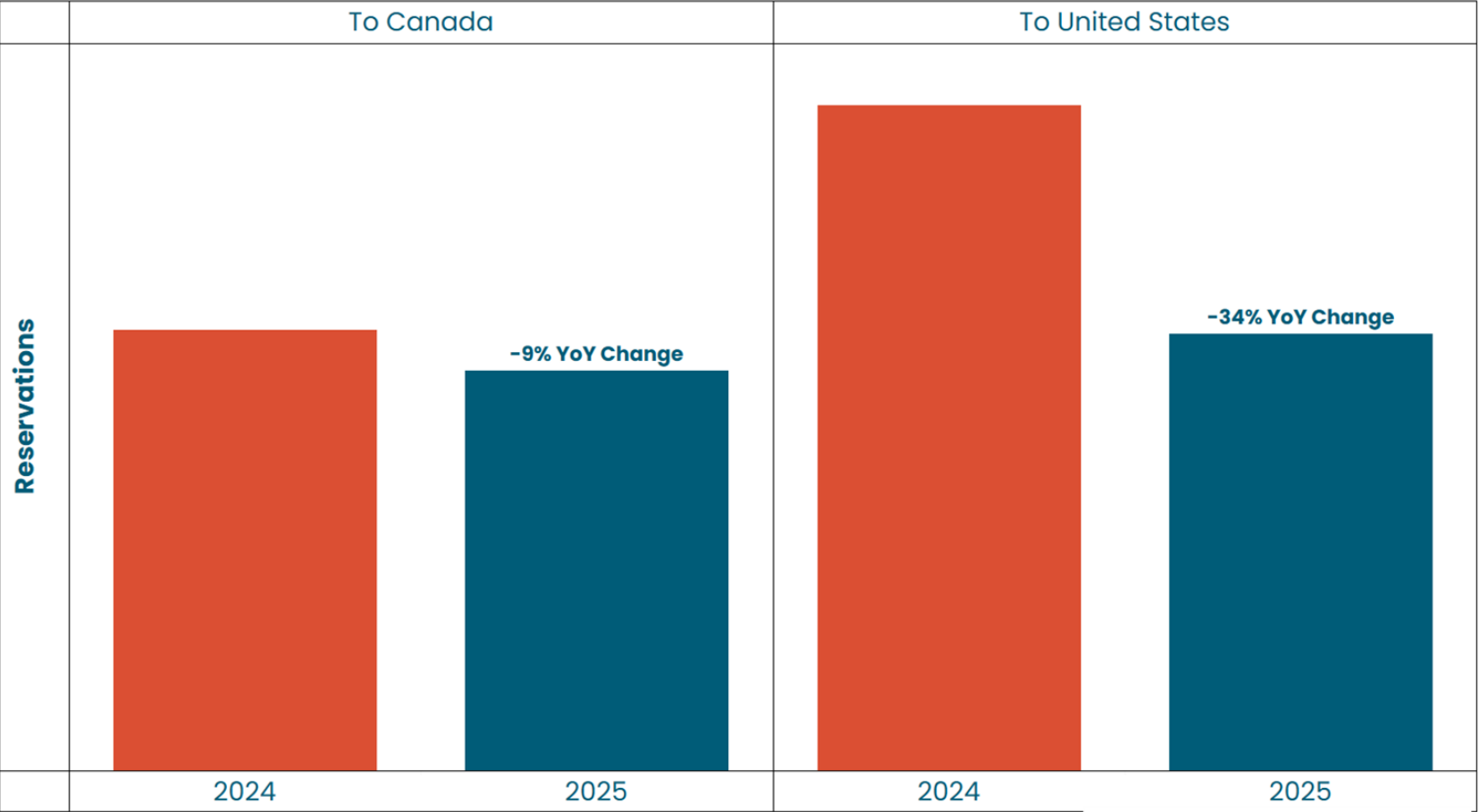




Canadian Travel Impacts

Direct data for Canadian bookings made between January 1 – July 15

Direct Vacation Rental
Reservations Made by Canadian Travelers



Booked On Date



- Following the initial tariff announcement in January, we've seen a shift in Canadian booking behavior.
- Bookings to the U.S. are down sharply YoY (-34%); Bookings within Canada are down (-9%).

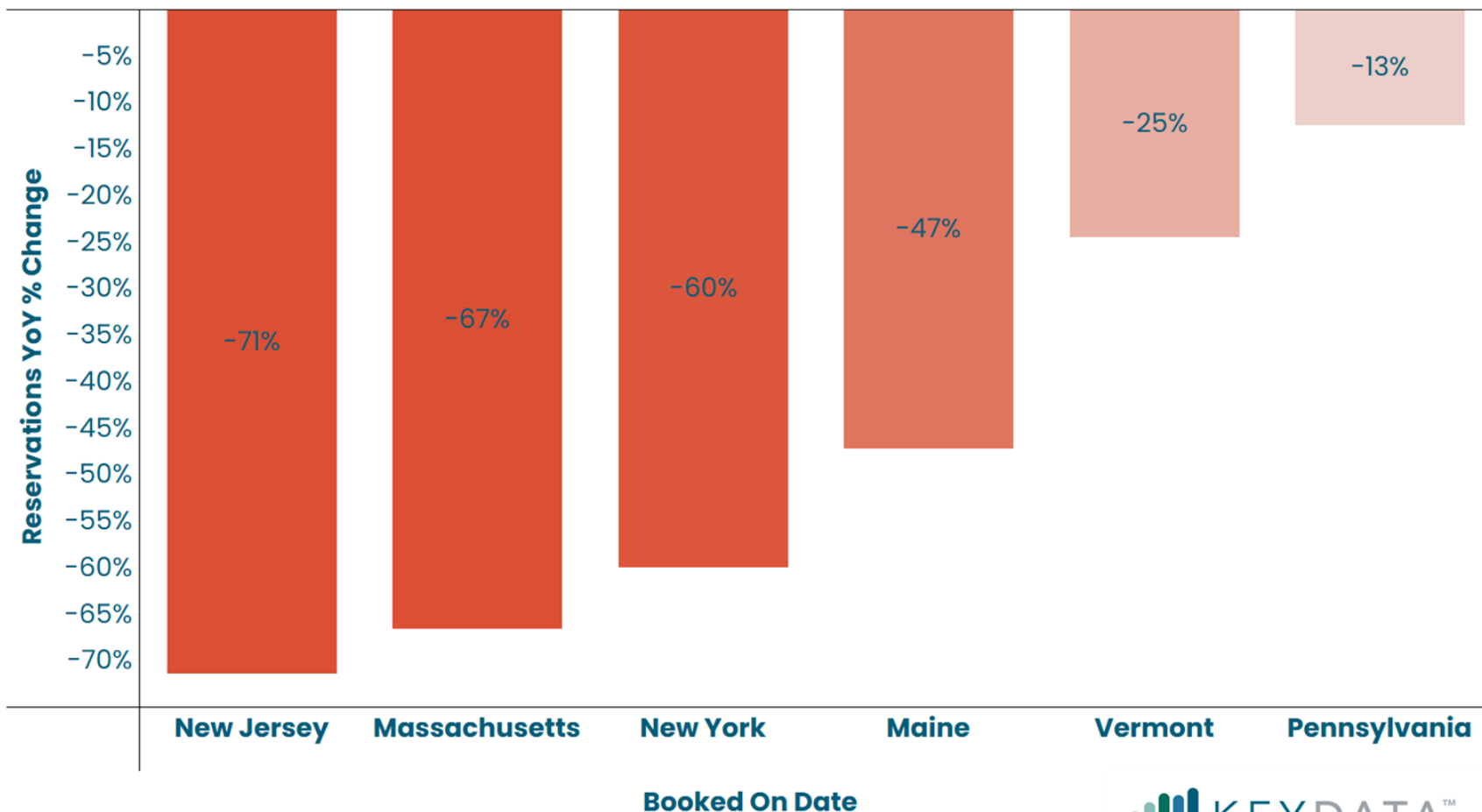
Direct Vacation Rental Data: Booked On Date between January 1 – July 15



Canadian Travel Impacts – Focus on Northeast U.S.

Direct data for Canadian bookings made between January 1 – July 15

Direct Vacation Rental
Reservations Made by Canadian Travelers to Northeastern States



- National Average: down 34%
- New York State: down 60% which is a slightly improvement from May (down 71%)
- Other Northeastern states are also seeing steep declines, New Jersey, Massachusetts, and Maine all more than the national average.

Direct Vacation Rental Data: Booked On Date between January 1 – July 15

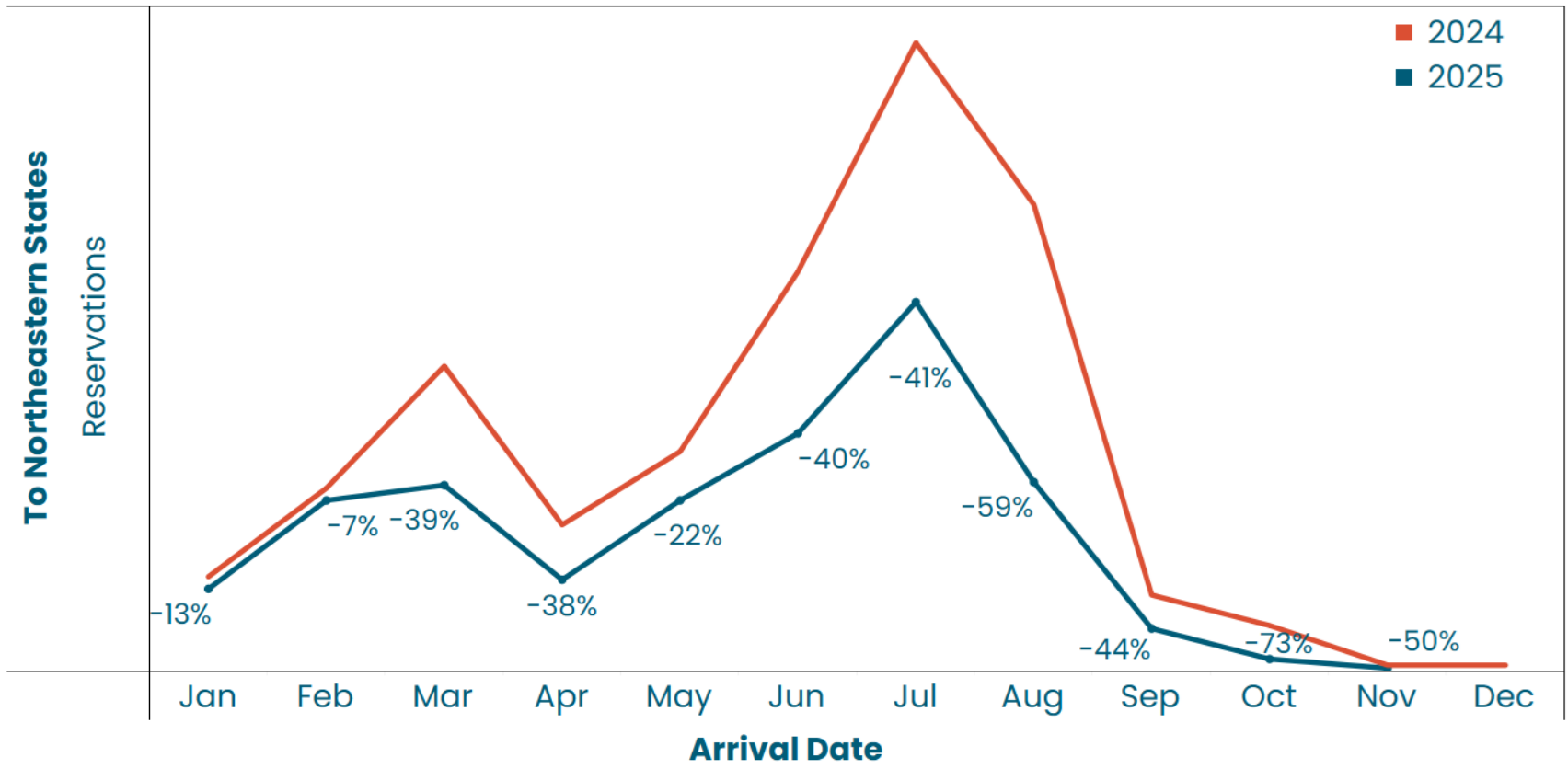


Canadian Travel Impacts – Pacing – Focus on Northeast U.S.

Direct data as of July 15

Direct Vacation Rental Reservations
Year-over-Year Pacing from Canadian Travelers

KEYDATA™

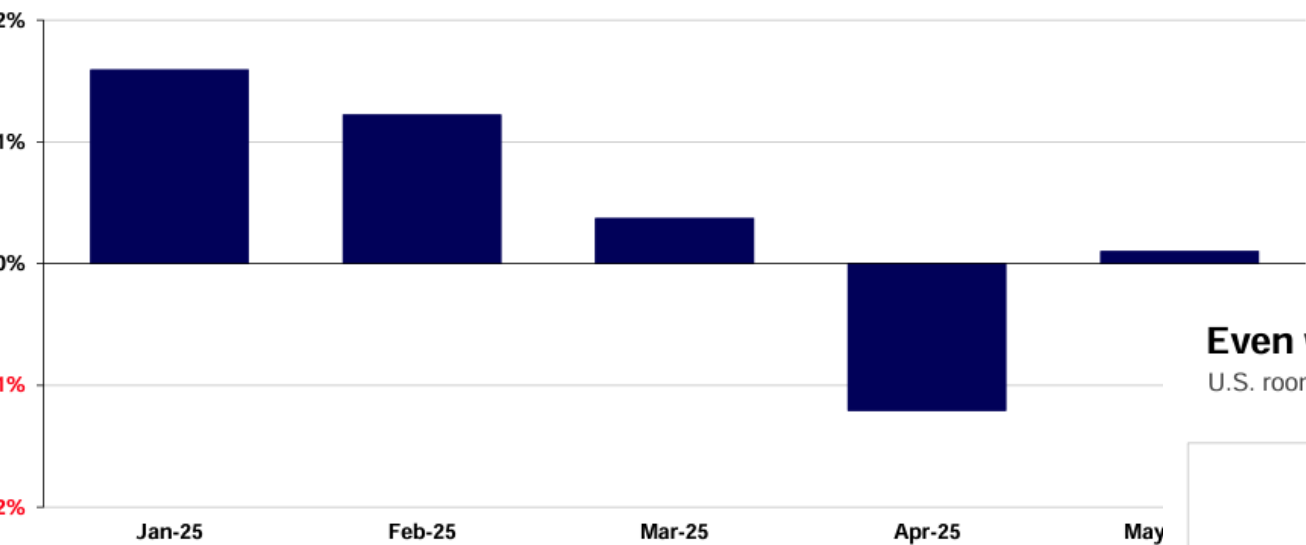


Direct Vacation Rental Data: Pacing as of July 15

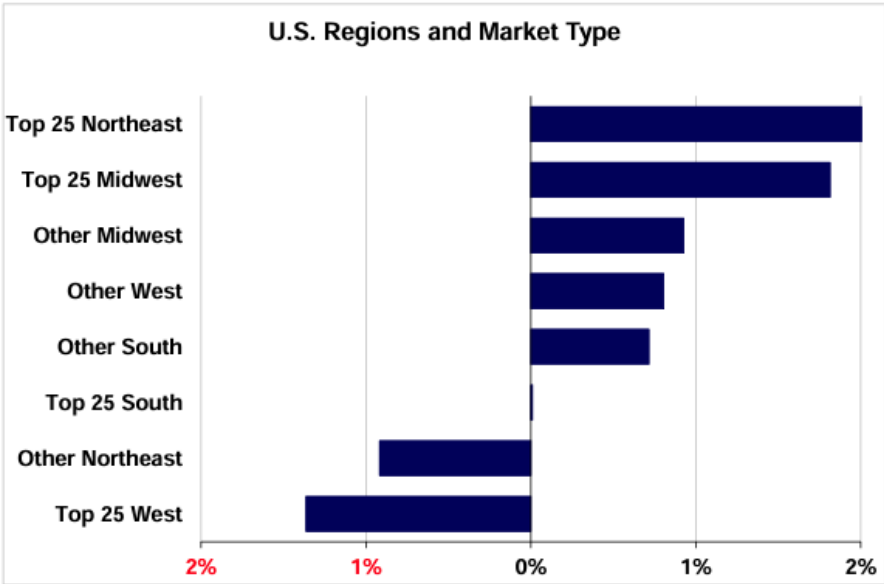
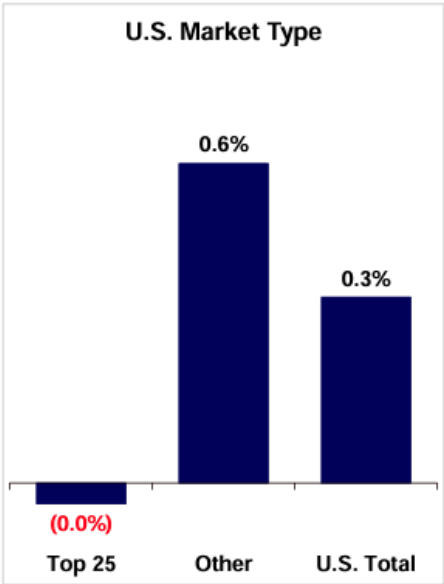
- New York State and the broader Northeast are seeing steep pacing declines in summer, with August arrivals down - 59%.
- September and October are pacing well below last year as well, signaling a significant potential impact to the fall season.

YTD limited to no Impact on Hotel demand—but some cracks emerge

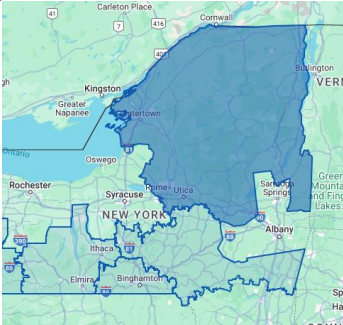
U.S. demand trending downward
U.S. room demand change



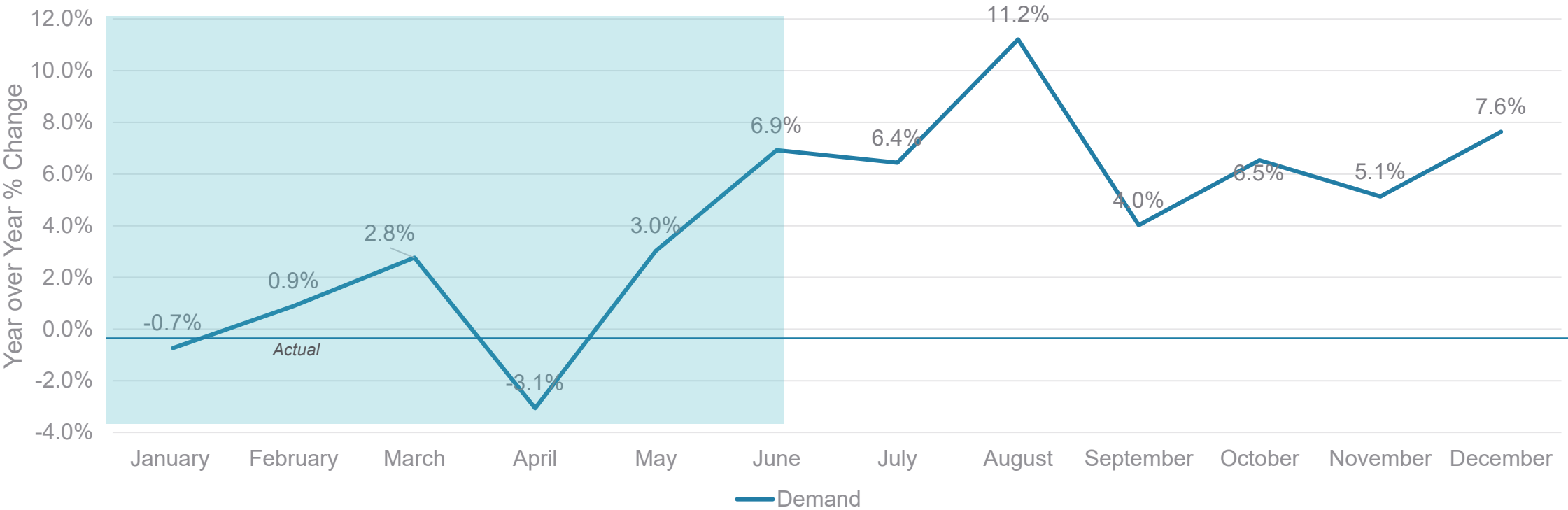
Even with the lower May demand gain, YTD still better than a year ago
U.S. room demand change by market location, May 2025 YTD estimate



Early forecast shows little impact on total hotel demand by all markets of origin



Upstate New York Market Segment
2025 Actual and Forecast YoY % Change Hotel Demand



Note: April demand declines largely driven by April 2024 Solar Eclipse event

Source: STR/Co-Star, as of July 10, 2025



Digging into your data

VISA

AIRDNA

 **Azira**TM

Q1 Canadian spend declines in Q1 2025



Visitor Segment | All Markets of Origin | All Card Spend | 2024 | Jan – Mar 2024 & 2025

	2024 total % of visitor spend			Q1 2025 vs Q1 2024 YoY % change		
	% Visitor Total Spend Domestic	% Visitor Total Spend International	Proportion of Canadian International Spend	Canadian Spend	Domestic Out of State Spend	Domestic In-State Spend
Jefferson	86.1%	13.9%	95.9%	-50.5%	-6.8%	2.7%
Genesee	95.6%	4.4%	82.4%	-9.6%	4.6%	-0.7%
Warren	96.4%	3.6%	80.5%	-40.7%	-2.5%	-4.1%
Cortland	97.0%	3.0%	74.4%	-20.6%	3.4%	-3.3%
Oneida	97.6%	2.4%	69.9%	-22.4%	5.0%	0.9%
CATS Region	98.0%	2.0%	46.9%	-15.9%	4.1%	7.5%

Start to measure impact of spend decreases



Visitor Segment | All Markets of Origin | All Card Spend | 2024 | Jan – Mar 2024 & 2025

**2024 total % of Canadian visitors expenditures
by top sectors**

	Fuel	Restaurants & Dining	Food & Grocery	Retail
Jefferson	13.4%	15.8%	17.6%	42.4%
Genesee	31.1%	29.4%	9.2%	13.7%
Warren	18.7%	25.5%	10.7%	24.7%
Cortland	49.6%	25.1%	8.9%	2.4%
Oneida	11.7%	24.7%	5.9%	12.8%
CATS Region	39.5%	25.1%	14.1%	7.7%

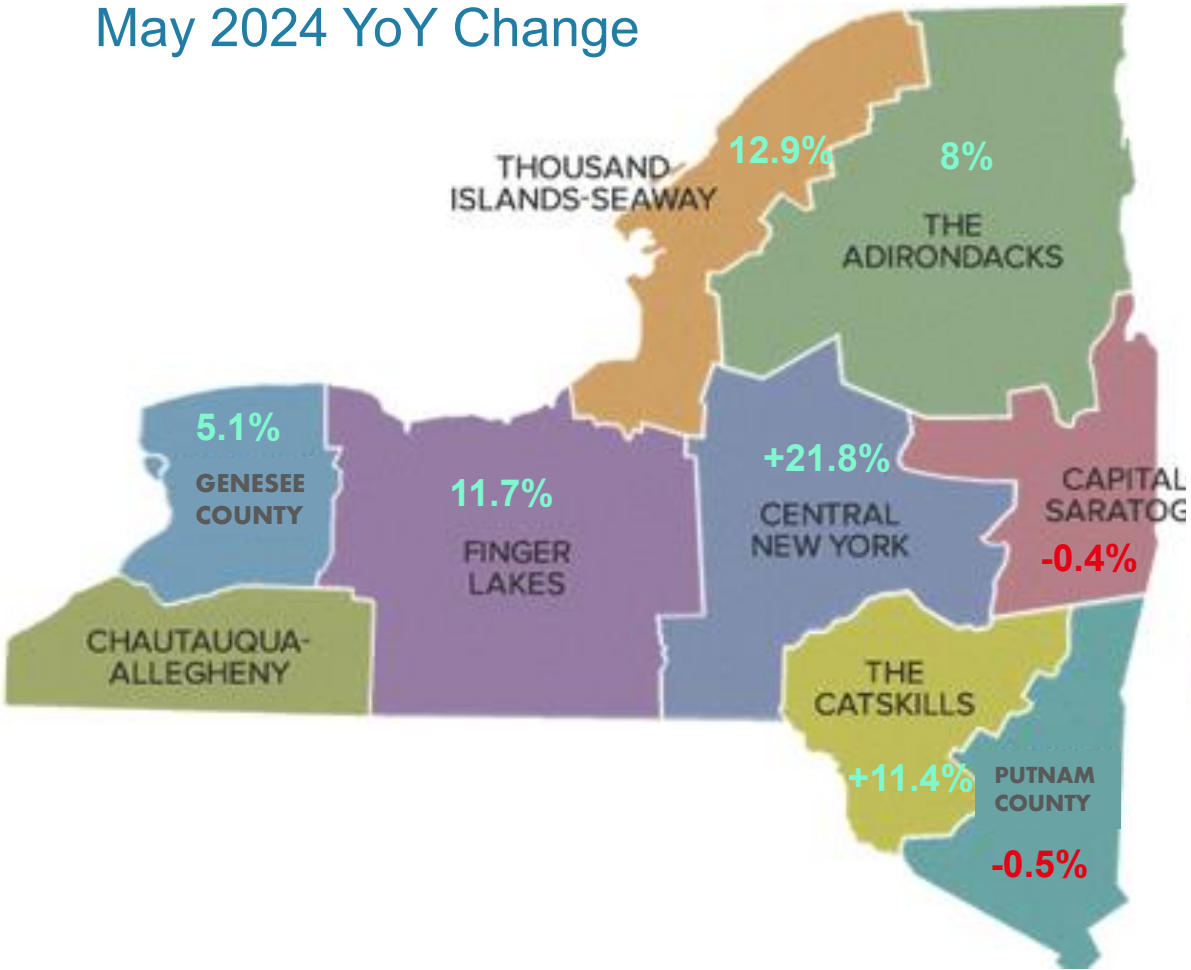
**Q1 2025 vs Q1 2024
YoY change in spend by Canadian visitors**

	Fuel	Restaurants & Dining	Food & Grocery	Retail
Jefferson	-29.9%	-49.2%	-56.8%	-57.2%
Genesee	-12.5%	-3.9%	-0.7%	-32.7%
Warren	-25.1%	-31.0%	-47.3%	-49.0%
Cortland	-20.5%	5.3%	-16.9%	-34.3%
Oneida	-14.7%	-5.6%	13.4%	-56.3%
CATS Region	-20.0%	-7.0%	-18.6%	3.0%

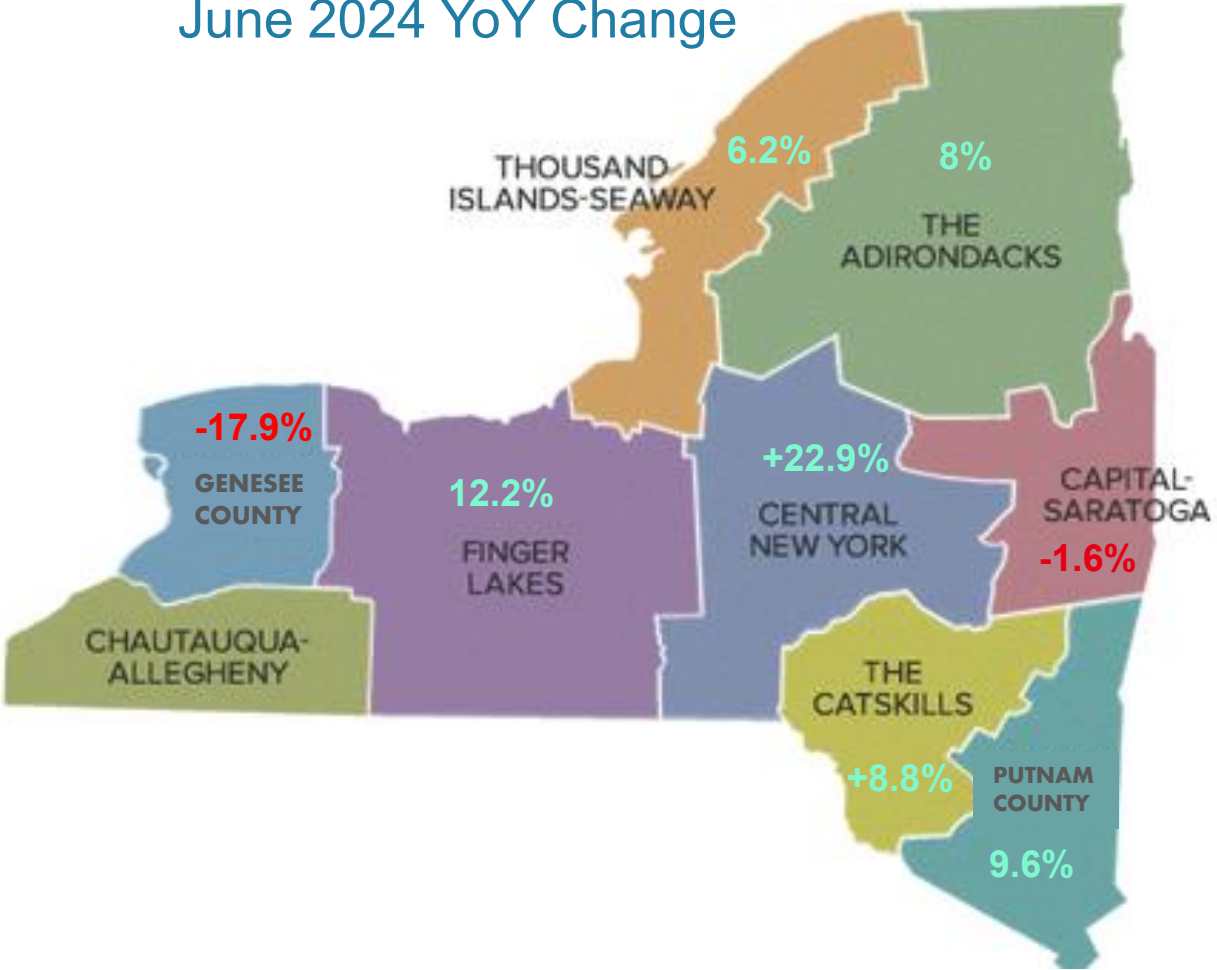
* Visa spend includes hotel & lodging expenditures, but only in destination card charges

Short-Term rental revenue (from *all markets of origin*)

May 2024 YoY Change



June 2024 YoY Change



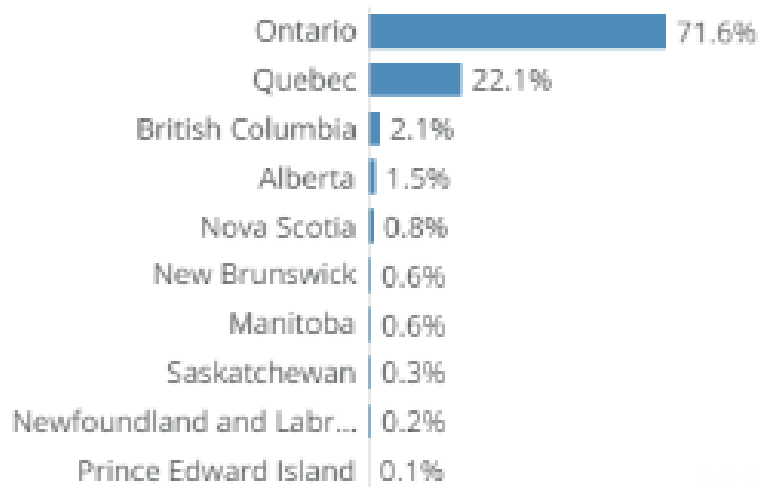
Increase in *cumulative* proportion of overnight stays by Quebecers in 2025 vs 2024; Ontario proportions decline



International Tourist Segment | Across All Up State Counties (excl. Long Island and New York) | Overnights

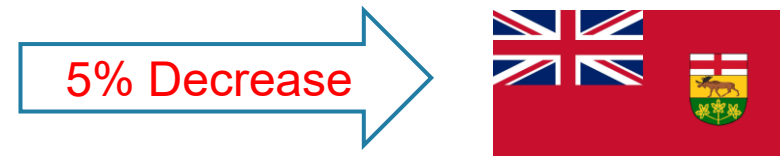
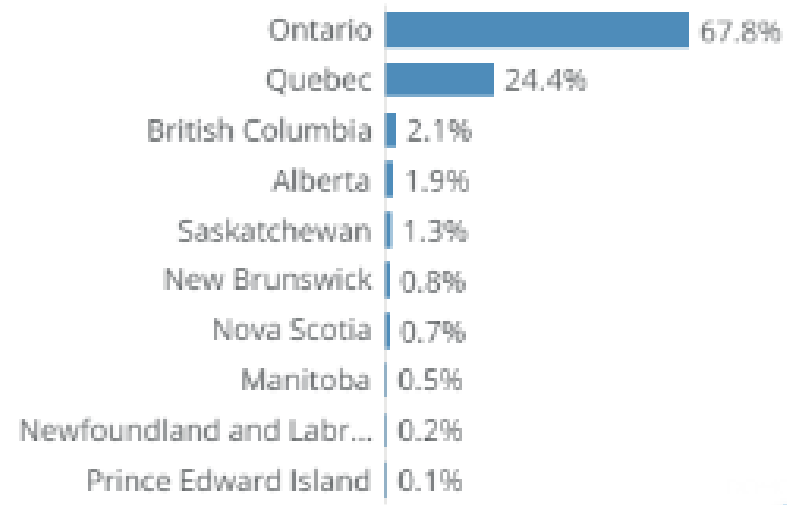
Jan 1 – June 15, **2024**

Common Evening State/Province



Jan 1 – June 15, **2025**

Common Evening State/Province



**Keeping a pulse on
tourism > tensions**

Take Aways

1. Canadian domestic travel thriving – summer **Canada Strong Pass** for free entry to National Parks, campgrounds, museums
2. Canadian *sentiment* still indicating a strong **YoY decline in intention to visit US**
3. **But Domestic travel market remains strong** with some shift in behavior based on economic uncertainty
4. YoY short-term **rental revenue up** in May and June across most all upstate NY regions – is Domestic visitation filling in the gap?

Thanks!

we are here to help

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