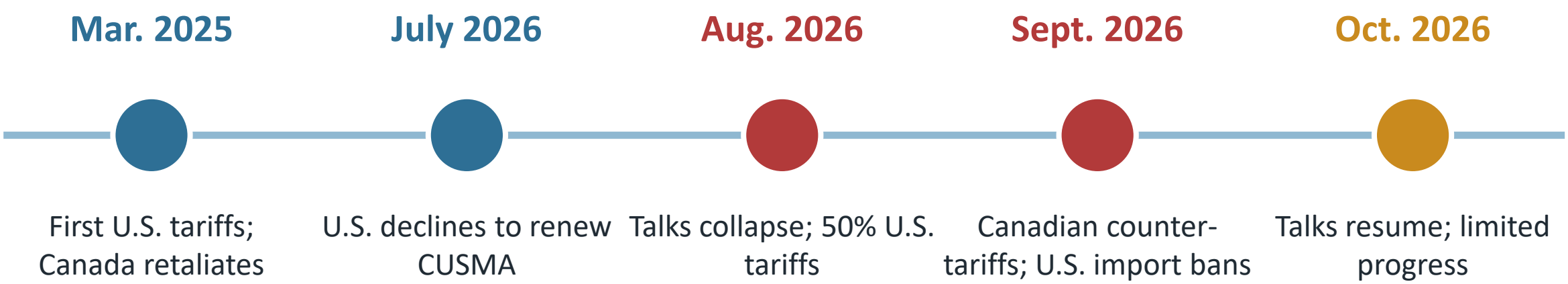


Julie Dennett

SVP, Membership Engagement-
Destinations International

Eighteen Months of Escalation



Sources: Congressional Research Service IF12595; BLG; The Canadian Press and Reuters (Oct. 2026).

Some Deescalation Language, Lesser Follow Through

Washington says a deal is close.

Ottawa says it will not sign August's terms.

What to watch



Nov. 3 midterms



Court test of the tariffs



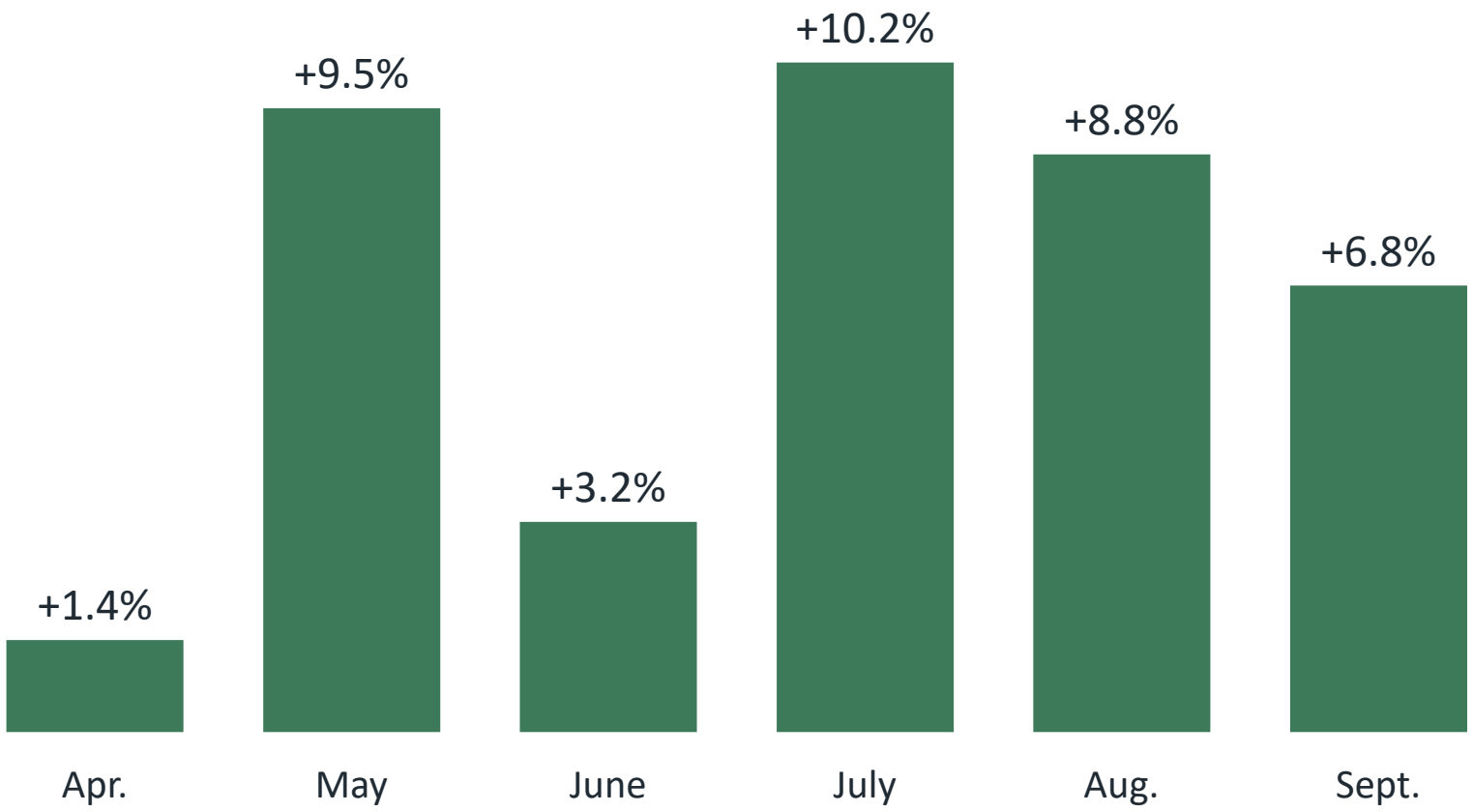
CUSMA review



Snowbird season

Sources: Bloomberg (Oct. 25, 2026); The Globe and Mail (Oct. 26, 2026); The Canadian Press (Oct. 27, 2026).

September Escalation Threatens Nascent Recovery in Canadian Travel to US



Canadian trips to the U.S.

vs. the same month of 2025

Real gains, measured against the worst year on record.

Source: Statistics Canada, Leading Indicator of International Arrivals to Canada, April to September 2026 (preliminary).

Recovery Still Well Below 2024 Levels



-31%

Car trips, Sept. 2026 vs. Sept. 2024



-19%

Air trips, Sept. 2026 vs. Sept. 2024

Car trips drive the border-region market, and they have the furthest to go.

Source: Statistics Canada, Leading Indicator of International Arrivals to Canada (Oct. 13, 2026).

Day trips are back. Overnight stays aren't

$145/C$206

Average spend, same-day visit

$946/C$1,344

Average spend, overnight visit

Two of three Canadian car trips south in June 2026 were same-day trips. Visits are recovering faster than spending.

Sources: Statistics Canada, National Travel Survey Q1 2026; international travel, June 2026. USD at US$1 = C$1.42.

Meanwhile, Americans keep heading north

+17%

U.S.-resident trips to Canada, Sept. 2026: the eighth monthly gain in a row

US$1 = C$1.42

The weak loonie makes Canada a bargain for Americans and the U.S. pricier for Canadians.

Sources: Statistics Canada, Leading Indicator (Oct. 13, 2026); exchange-rates.org (October 2026).

The Northeast corridor: hit hard, healing slowly

New York

-28%

Canadian visitor spending, 2025

1000 Islands

~15%

Share of N.Y.-side visitor spending from Canadians

Vermont

+28%

Canadian card spending, Aug. 2026 vs. 2025

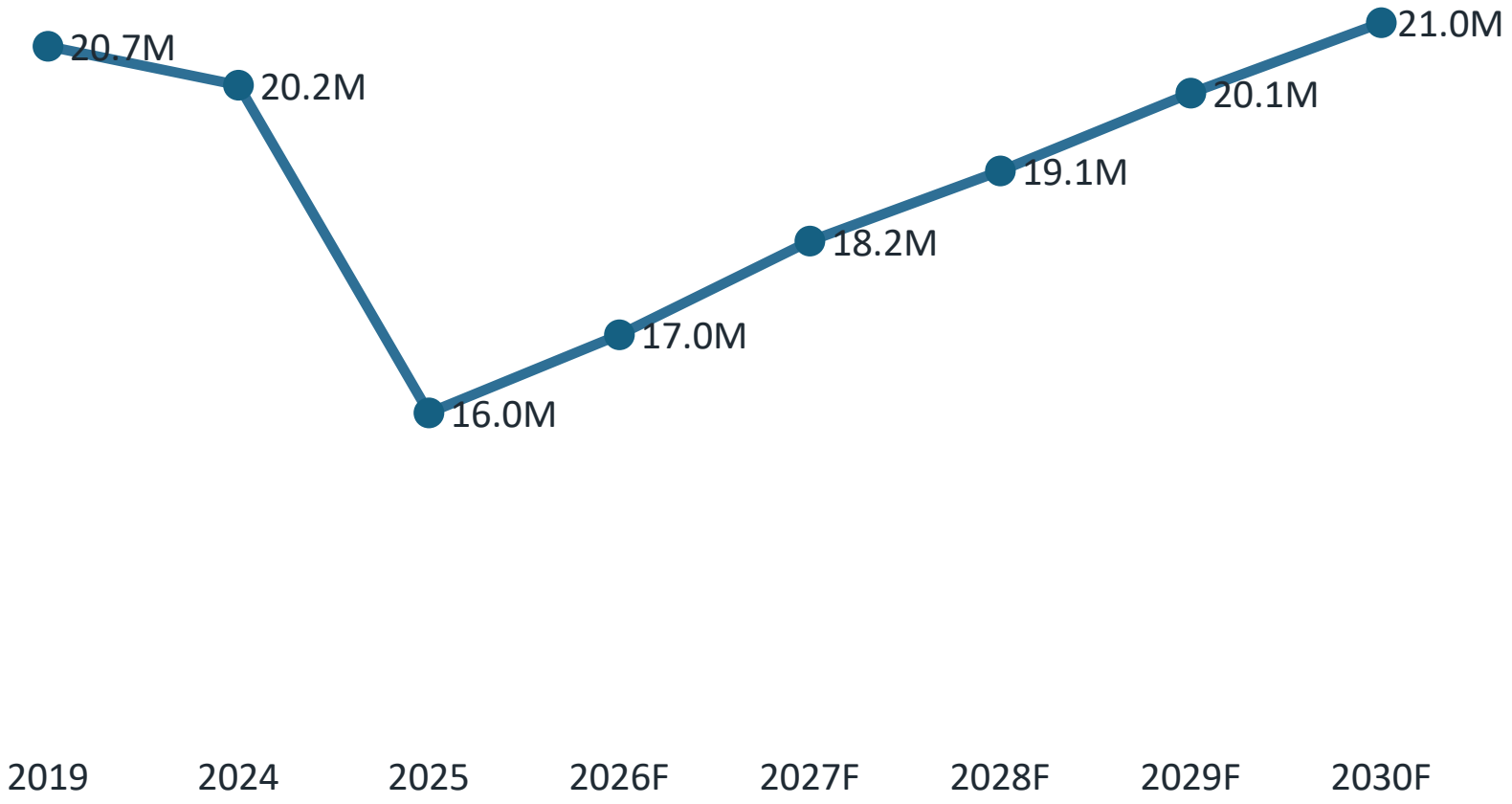
Maine

-20%

Crossings, July 2026 vs. July 2024

Sources: NY Governor's Office (Aug. 21, 2026); NYSTIA (Aug. 2026); Vermont Dept. of Tourism and CBP data via Portland Press Herald and Hashtag Investing (Sept. 2026).

A Long Climb Back to Baseline



Canadian overnight visits to the U.S.

Back to 2019 levels in 2030, assuming tensions remain stable or improve.

Does not account for potential Canadian traveler demand destruction.

Source: U.S. Travel Association Travel Forecast, Spring 2026 (Tourism Economics model).

Three Roads from Here

De-escalation

~19M

Canadian visits in 2027

US$0.5B to 1.0B a year below 2024

Drive market and day trips rebound first

Status quo

~18M

Canadian visits in 2027

US$1.0B to 2.1B a year below 2024

Slow grind; overnight stays lag

Escalation

15M to 16M

Canadian visits in 2027

US$2.0B to 5.3B a year below 2024

Border regions feel it first

DI scenarios built on the U.S. Travel / Tourism Economics Spring 2026 baseline, Statistics Canada 2025 spending data, and U.S. Travel's sensitivity estimate.

VISITOR SPENDING



October 2026 | YTD 2026 Market Intelligence · Canadian Data Collective (LASR) & Environics Analytics

INTRODUCING

MEGAN KNOTT

CEO, Tourism Kingston

(she/her)



MARKET OVERVIEW · YTD 2026 THROUGH AUGUST

VISITOR SPENDING AT A GLANCE

ONTARIO
visitor spending YTD

−1.6%

OVERSEAS
visitor spending YTD

+11%

UNITED STATES
visitor spending YTD

+0.5%

Ontario, Kingston's largest source market, saw a modest decline in spending. Overseas markets are driving meaningful growth year to date through August 2026.

Source: Canadian Data Collective, LASR, YTD 2026 through August

U.S. VISITOR SPENDING · YTD 2026

U.S. REMAINS KINGSTON'S #2 SPENDING MARKET

U.S. VISITOR SPENDING, YTD 2026

$62.6M

▲ +0.5% vs. YTD 2025

#2

Ranked second overall, behind Ontario

16.3%

Share of total visitor spending YTD

Ahead of Quebec

U.S. visitors outspend Quebec visitors in Kingston

Source: Canadian Data Collective, LASR, YTD 2026 through August

OVERSEAS VISITOR SPENDING · YTD 2026

OVERSEAS SPENDING UP 11%

+11%

OVERSEAS SPENDING YTD VS. 2025

MARKETS WITH SPENDING GROWTH

France
United Kingdom
Germany
Australia

Spending from French, British, German and Australian visitors all increased through August 2026 compared to the same period in 2025.

Source: Canadian Data Collective, LASR, YTD 2026 through August

CANADIAN VISITOR SPENDING · YTD 2026

REST OF CANADA: SPENDING UP 1%

VISITOR SPENDING FROM CANADA, OUTSIDE ONTARIO
YTD 2026

$60.7M

▲ +1% vs. YTD 2025

PROVINCES DRIVING GROWTH

Alberta

▲ Spending up YTD 2026

British Columbia

▲ Spending up YTD 2026

Source: Canadian Data Collective, LASR, YTD 2026 through August

CHINESE VISITOR SPENDING · YTD 2026

CHINESE MARKET SPENDING DOWN 22% YTD

−22%

YTD 2026 VS. SAME PERIOD 2025

$8.9M

2024 spending (recent high)

$3.8M

Spending through August 2026

After reaching a recent high of $8.9M in 2024, spending from Chinese visitors fell to $3.8M through August 2026, a 22% drop compared to the same period in 2025.

Source: Canadian Data Collective, LASR, YTD 2026 through August

TRIP VOLUMES · SUMMER 2026 VS. 2025 · ENVIRONICS ANALYTICS

INTERNATIONAL TRIPS UP, U.S. TRIPS DOWN

+15%

INTERNATIONAL TRIPS
Summer 2026 vs. 2025

−6%

U.S. TRIPS
Summer 2026 vs. 2025

TOP OVERSEAS MARKETS BY TRIP GROWTH

UK · Germany · Italy · Spain

Source: Environics Analytics, Summer 2026