

TRAVEL  
SOUTH  
USA

THE INTERNATIONAL  
GATEWAY TO THE  
SOUTHERN USA



# Program of Work Canada

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# Growth Trajectory

2015–2019 CAGR

**-3.6%**

Spending

**-0.3%**

Visits

2023–2027 PROJECTED CAGR

**-0.8%**

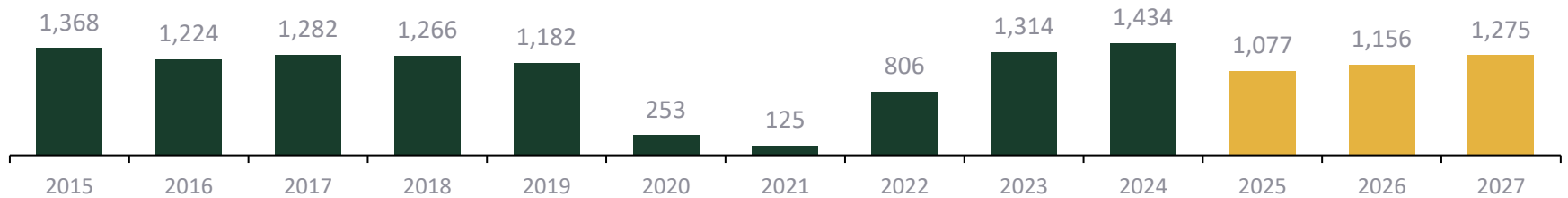
Spending

**-3.1%**

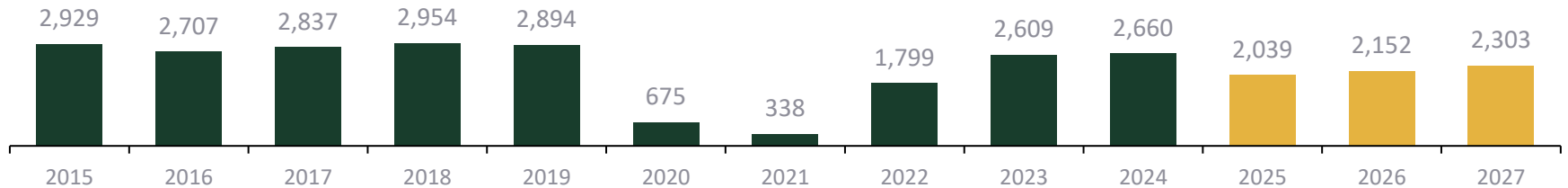
Visits

CAGR is Compound Annual Growth Rate.

## Visitor Spending (\$M)



## Visits (K)



■ Historic    ■ Forecast

# Canada

**\$1.2B**

2026 TSUSA Spending

**+7.3% YOY** vs. 2025

**2.2M**

2026 TSUSA Visitors

**+5.5% YOY** vs. 2025

**\$16.4B**

2026 USA Spending

**+7.6% YOY** vs. 2025

**20.9M**

2026 USA Visitors

**+6.6% YOY** vs. 2025

**\$1.1B**

2025 TSUSA Spending

**-24.9% YOY** vs. 2024

**2M**

2025 TSUSA Visitors

**-23.3% YOY** vs. 2024

**\$15.2B**

2025 USA Spending

**-21.5% YOY** vs. 2024

**19.6M**

2025 USA Visitors

**-23.1% YOY** vs. 2024

# Where are we?

## **Visitor Recovery:**

Sights are on recovery following a challenging 2025 for visitor volumes. The region is rebuilding momentum with renewed focus on attracting the right travellers.

## **Social Media:**

Canada social channels are seeing gains with growing engagement across platforms.

## **Media Coverage:**

Behind expectations as Canadian travel sections are not broadly prioritizing USA destinations. The Global Summit proved there is growing appetite for Southern experiences among media.

## **New Air Access:**

Porter Airlines launched a new direct route to Nashville on May 11, 2026 — a key connectivity win opening the region to a new wave of Canadian travellers.

## **Trade Strategy:**

FY27 will focus on digital strategy and key industry meetings with airlines. Consumer outreach will be prioritized to offset the current narrative and appeal to specific demographics that are actively travelling.

# Strategic Plan for FY 2026-27

For FY2026-27, the strategy will focus on rebuilding market momentum through targeted trade engagement, renewed destination storytelling and consumer outreach to high-potential Canadian travelers.

## TRAVEL TRADE OUTREACH

Rebuild momentum by strengthening trade relationships and positioning the South as a compelling choice for Canadian travelers seeking distinctive U.S. experiences.

**Key activity:**

- Targeted sales and industry meetings
- International Showcase buyer recruitment
- Product education and itinerary development
- Airline relationship building
- Focus on road trips, outdoors, culture, culinary and music
- This gives the trade program more purpose while staying grounded in their stated strategy and priority segments.

## PR & MEDIA OUTREACH

Reignite destination awareness through targeted earned media that positions the South as culturally rich, accessible and relevant to younger and affluent Canadian travelers.

**Key activity:**

- Ongoing media relations and pitching
- Monthly media newsletters
- Print, digital and broadcast outreach
- Global Media Marketplace and FAM recruitment
- PR mission and media event
- Culinary, culture, outdoors, music and road trip storytelling

## SOCIAL & CREATOR UGC

Grow consumer engagement through inspiring social content and targeted activations that reach Canadians who remain highly motivated to travel.

**Key activity:**

- Organic social content and community growth
- Destination and thematic storytelling
- Food & Drink Festival activation
- Social amplification of PR and consumer initiatives
- Creator engagement tied to culinary and lifestyle storytelling

# CANADA Market Overview

## KPI's & GOALS

| Project                                    | KPI          |
|--------------------------------------------|--------------|
| <b>TRADE</b>                               |              |
| Tour operator meetings                     | 20           |
| Agents Trained                             | 0            |
| International Showcase & FAMs participants | 5            |
| Travel South Travel Trade Newsletter       | 0            |
| Open rate for Newsletters/leads generated  | 0%           |
| <b>Managed Media</b>                       |              |
| Media Meetings                             | 50           |
| No. of Articles Generated                  | 30           |
| Impressions                                | 20M          |
| Global Media Marketplace & FAMs            | 4            |
| Travel South USA PR Newsletters            | 10           |
| Open rate for Newsletters/leads generated  | 20%          |
| <b>Social Posts - Owned Channels</b>       |              |
| <b>Facebook</b>                            |              |
| # of Posts (at least 6 per month)          | 6+ per month |
| <b>Partner Engagement</b>                  |              |
| Alabama Highlighted Activation             | 1            |
| Arkansas Highlighted Activation            | 1            |
| Kentucky Highlighted Activation            | 1            |
| Mississippi Highlighted Activation         | 1            |
| Missouri Highlighted Activation            | 1            |
| North Carolina Highlighted Activation      | 1            |
| South Carolina Highlighted Activation      | 1            |
| Tennessee Highlighted Activation           | 1            |
| ROTS Highlighted Activation                | 1            |

## Canada - 2026

| Category      | Date                                 | Description                                                          | Location             |
|---------------|--------------------------------------|----------------------------------------------------------------------|----------------------|
| Industry      | July 22, 2026                        | Discover America Canada Consul General Garden Party Networking Event | Toronto, ON          |
| Media         | October 26-29, 2026                  | Brand USA Canada Connect                                             | Toronto, ON          |
| Media & Trade | December 2026 - TBC                  | Discover America Canada Holiday Event                                | Toronto, ON          |
| Trade         | Nov 29-Dec 3, 2026 + Dec 3 - 6, 2026 | Travel South International Showcase                                  | Nashville, TN + FAMS |

## Canada - 2027

| Category | Date                    | Description                               | Location                      |
|----------|-------------------------|-------------------------------------------|-------------------------------|
| Media    | March 31- April 2, 2027 | Media Mission                             | Toronto, ON                   |
| Media    | April 2-4, 2027         | Toronto Food & Drink Fest - Consumer Show | Toronto, ON                   |
| Media    | April 26-29, 2027       | Travel South Media Marketplace            | Bentonville, AR + Press Trips |
| Industry | TBC                     | Discover America Canada AGM               | Toronto, ON                   |
| Trade    | May 2-6, 2027           | IPW                                       | New Orleans, LA               |