BEYOND BORDERS TOURISM COALITION

BINATIONAL INTELLIGENCE REPORT

Publish date: August 12, 2026 | Intelligence window: July 30 to August 12, 2026 (14 days)

Prepared by the BBTC Intelligence Desk : AI Agent. Where an underlying data release carries a different reference date, that date is noted inline.

URGENCY CALLOUT

The recovery in this window is arithmetic, not structural. Statistics Canada's August 11 release shows a fourth consecutive month of year-over-year growth in Canadian return trips from the United States, and Statistics Canada itself attributes the gain to a base-year effect off the 2025 trough. Measured against July 2024, the honest baseline, Canadian auto returns are still 28.9% lower and air returns 26.8% lower. Into that fragile picture, 50% United States tariffs on roughly US$20 billion of Canadian goods take effect on August 19, seven days after this report publishes, with Canada-United States negotiations described by Prime Minister Carney as firm and unresolved.

SECTION 0 Active Topics Index

Fast-scan index of every topic with a development inside the window, plus the two standing entries that appear every cycle.

Topic	Status	One-line summary	See sections
Canada to United States travel volumes	Escalating	Fourth straight year-over-year gain, but July auto trips remain 28.9% below July 2024 and air trips 26.8% below.	1, 2, 3.A
United States and overseas arrivals to Canada	Active	United States resident trips up 6.5% to 2.66 million; overseas resident trips up 5.7%, the strongest net-new-money line in the print.	2, 3.B, 3.5
Tariffs and the USMCA trade track	Escalating	50% sectoral tariffs on roughly US$20 billion effective August 19; Carney declines a narrow deal and keeps all strategic sectors on the table.	3.C, 4, 6
TSA staffing, ICE deployment and data sharing	Escalating	New TSA administrator confirmed July 30; three House measures in nine days to sever TSA to ICE passenger data flow.	2, 3.D, 5, 6, 7
Fuel and transportation costs	Active	Jet fuel fell 7.5% week over week to US$146.93 per barrel, but United States diesel remains 44.2% above a year ago.	2, 3.E, 3.5, 6
Iran conflict (inbound only)	Stable	No material inbound tourism impact identified in this window; the transmission channel remains fuel pricing, which eased.	3.E, 6
Gateway community economics	Active	Named-operator evidence of an American-inbound offset in Atlantic Canada and Quebec City; the United States gateway side produced no fresh in-window reporting.	3.B, 3.5, 5
Jay Treaty and Indigenous cross-border tourism	No Development This Window	No fresh in-window development. ITAC remains paused and the coalition's Indigenous pillar remains at structural risk.	4, 6
FIFA World Cup 2026 cross-border readiness	No Development This Window	Tournament closed July 19. No in-window announcement on whether tournament-era entry facilitation becomes permanent.	6

Topic	Status	One-line summary	See sections
Bright Spots / Tailwinds	Active	Five genuine in-window signals, led by United States and overseas arrivals into Canada and the reversal in jet fuel.	1, 3.5

SECTION 1 Week-over-Week Dashboard

This period: July 30 to August 12, 2026. Prior period: July 16 to July 29, 2026.

Indicator	This period	Prior period	Note
New Tier 1 data releases	2	3	Statistics Canada leading indicator for the July reference month (August 11) and the AAA daily fuel benchmark (August 12). The prior period was led by the Statistics Canada year-in-review of July 22.
New policy or regulatory actions	4	3	TSA administrator confirmed July 30; Larson bill August 5; Tlaib H.R. 10040 August 6; the August 19 sectoral tariff schedule held in place through the negotiating round.
Gateway-community impact stories	1	2	A thin window. Named-operator evidence from Atlantic Canada and Quebec City (August 5). No fresh United States border-town reporting surfaced inside the window.
Sentiment trend	Flat, fragile upward tilt	Worsening	Longwoods International: there are indicators that the bleeding may have stopped. Flight Centre Canada: United States leisure bookings up 5.7% but still down 39% against two years ago.
BBTC or member advocacy actions	0	0	Second consecutive zero-action window. The most recent traceable coalition statement remains March 2026 on the USMCA Travel and Tourism Resiliency Act.
Iran flag	No	No	No material inbound tourism impact identified in this window.
Fuel and transportation flag	Yes	Yes	Jet fuel reversed direction and fell 7.5% week over week. Pump diesel is still 44.2% above a year ago, which is what motorcoach and drive-market operators actually pay.
TSA and ICE flag	Yes, escalating	Yes	Records covering more than 31,000 travellers and more than 800 immigration arrests are now documented, and the issue moved from oversight letters into introduced legislation.
FIFA readiness flag	No	Yes	No Development This Window. The tournament closed July 19 and no in-window announcement addressed permanence of entry facilitation.
Bright Spots flag	Yes, five signals	Yes	Led by United States resident and overseas resident arrivals into Canada, and by the jet fuel reversal.

METHODOLOGY FLAG: COUNTS ARE DESK TALLIES

The release, action and story counts above are BBTC Intelligence Desk tallies of items meeting this report's selection rules, not a published index. They are directionally useful for period-to-period comparison and should not be cited as an external statistic.

SECTION 2 Key Statistics

The Statistics Canada anchor for this cycle is the [Leading indicator of international arrivals to Canada, July 2026](), released August 11, 2026. The URL was fetched directly and resolved live on the official statcan.gc.ca domain.

Statistic and geography	Figure	Date	Source (tier)	Versus prior period
Canadian-resident return trips from the United States, all modes (Canada)	2,277,054, up 10.2% year over year	July 2026 reference month, released Aug 11	Statistics Canada (Tier 1)	Fourth consecutive month of year-over-year growth. Statistics Canada attributes the increase to a base-year effect following the sharp 2025 decline.
Canadian-resident returns by mode, measured against the 2024 baseline	Auto 28.9% below July 2024; air 26.8% below July 2024	July 2026 reference month	Statistics Canada (Tier 1)	The honest measure. Against 2025 the same figures read auto up 12.8% and air down 1.4%. Air has still not turned.
United States resident trips to Canada	2,663,946, up 6.5% (auto up 7.2%, air up 4.8%)	July 2026 reference month	Statistics Canada (Tier 1)	Acceleration from the June reference month, which recorded 2.182 million and up 5.1%. The strongest northbound reading of the year to date.
Overseas-resident trips to Canada	863,649, up 5.7% (air up 6.8%, auto down 3.4%)	July 2026 reference month	Statistics Canada (Tier 1)	Net new international spending into Canada, growing on the air channel where yield is highest.
Total international arrivals to Canada	6.8 million, up 6.3%	July 2026 reference month	Statistics Canada (Tier 1)	Prior period reading for the June reference month was 5.5 million and up 3.6%. Seasonal peak plus genuine inbound growth.
Global average jet fuel price	US$146.93 per barrel, down 7.5% week over week	Weekly assessment	IATA Jet Fuel Price Monitor (Tier 1). Page carries no explicit date.	A genuine reversal. The prior period reading was US$160.06 per barrel and up 7.1% week over week.
United States pump prices, regular and diesel (national average)	US$4.036 and US$5.358 per gallon	August 12, 2026	AAA (Tier 2 fuel benchmark)	Regular eased 1.1% week over week but is 28.5% above a year ago. Diesel is 44.2% above a year ago and 9.8% above a month ago.
TSA passenger records shared with ICE	More than 31,000 travellers; more than 800 immigration arrests	July 31, 2026	American Oversight (Tier 3) citing TSA records	New scale figures. The prior period documented the existence of the May 2025 memorandum of agreement, not the volume of records moved under it.

HONESTY FLAG: TSA TO ICE VOLUMES ARE NOT AGENCY-CONFIRMED

The 31,000 records and 800-plus arrests figures originate with American Oversight, an oversight organisation, citing disclosed TSA records. They have not been independently confirmed in a DHS or TSA statement. Carry them as documented but unconfirmed, and attribute them to the source rather than to the agency.

SECTION 3 What Moved and Why It Matters

3.A The July print is a base-year artifact, not a reversal

What changed: Statistics Canada reported 2,277,054 Canadian-resident return trips from the United States in July 2026, up 10.2% year over year, with auto up 12.8% and air down 1.4%. This is the fourth consecutive month of year-over-year growth, and it is the first cycle in which the agency has put its own base-year caveat in writing: the increase is largely attributable to the sharp 2025 decline that follows the geopolitical break. Against July 2024, auto returns are 28.9% lower and air returns 26.8% lower. Flight Centre Canada put the same point in commercial terms: United States leisure bookings are up 5.7% but remain 39% below two years ago.

Who it affects: United States gateway DMOs and border-town operators reading the headline as a turn; Canadian outbound sellers pricing fall and winter programmes; airlines deciding whether to restore transborder capacity they removed across 2026.

Why it matters on both sides: The auto and air divergence is the analytically important part. Auto returns are recovering because day trips and short drive trips are cheap to resume and cheap to abandon. Air returns, which carry the overnight stays, the hotel nights and the higher per-trip spend, are still falling. A United States gateway that plans on the 10.2% headline is planning for volume it will not monetise. August prints will flatter further still, because July and August 2025 were the deepest months of the trough. This desk will continue to lead with the 2024 comparison.

Track connection: The air weakness compounds the carrier capacity withdrawals already booked for the winter season, including the eight Air Canada United States routes cut or postponed in the prior window. Restoring air demand and restoring air capacity are now a chicken-and-egg problem heading into a shoulder season.

3.B Americans and overseas visitors are carrying Canada's inbound side

What changed: United States resident trips to Canada reached 2,663,946 in July, up 6.5%, with auto up 7.2% and air up 4.8%. Overseas-resident trips reached 863,649, up 5.7%, with the air channel up 6.8%. Total international arrivals hit 6.8 million, up 6.3%. Separately, Statistics Canada data reported August 5 put first-quarter 2026 Canadian tourism spending at C$29.5 billion, up 5.6%, of which C$23.5 billion was domestic. Ambassatours Gray Line in Halifax told reporters its passenger counts are running 29% ahead of last year, crediting both American visitors taking advantage of the exchange rate and Canadians staying home.

Who it affects: Canadian DMOs, attractions, Indigenous tourism operators and receptive operators; United States outbound sellers; and, in mirror image, the United States gateway communities losing the volume Canada is gaining.

Why it matters on both sides: This is the clearest evidence in several cycles that the cross-border relationship has become asymmetric rather than simply smaller. Canada's inbound side is growing on both the American and the overseas channel while its outbound-to-United States side recovers only in the cheapest mode. For BBTC that asymmetry is a message, not a scoreboard: facilitation and welcome are producing measurable volume in one direction and friction is suppressing it in the other, inside the same fourteen days.

A caution on the domestic figure: The C$23.5 billion domestic component fills capacity but redistributes spending already inside the Canadian economy. Only the international lines represent genuinely new money. That distinction should be preserved in any coalition use of the number.

3.C The August 19 tariff wall lands inside the travel-planning window

What changed: The 50% United States tariffs on roughly US$20 billion of Canadian imports, covering wine, hockey sticks, cement, dairy, furniture and other categories, remain scheduled for August 19, 2026. Inside this window Prime Minister Carney characterised Canada's negotiating tone as already quite firm and said he is not interested in a narrow deal, with all strategic sectors under discussion. No resolution was reached before this report's publication date.

Who it affects: Border-town retail and hospitality on both sides; Canadian producers whose visitor experiences are attached to exported goods, notably wineries and distilleries; motorcoach and group operators selling autumn cross-border programmes; and DMOs whose Canadian visitor messaging now competes with a fresh trade grievance.

Why it matters on both sides: The tourism effect of a tariff round is not the tariff. It is the sentiment shock that follows it, and the timing is unhelpful: August 19 falls squarely inside the decision window for Canadian autumn travel and for the fall foliage motorcoach season that United States border states depend on. The 2025 pattern was that each escalation produced a step down in Canadian travel intent that did not fully recover. A base-year-flattered summer print is a weak shield against a second such step.

3.D TSA to ICE data sharing became a legislative fight in nine days

What changed: The Senate confirmed David Cummins as TSA Administrator on July 30. On July 31, American Oversight called on him to give Congress and the public a full accounting of the TSA and ICE data-sharing partnership and to reconcile disclosed records with prior sworn testimony, citing records covering more than 31,000 travellers, more than 800 immigration arrests, and airport arrests in Boston, Las Vegas and Denver. On August 5 Representative John Larson announced the No TSA Data for ICE Act following covert ICE operations at Bradley International Airport in which passenger names, addresses and credit card numbers were shared. On August 6 Representative Rashida Tlaib introduced H.R. 10040 with 25 cosponsors, and on August 11 Representative Nikema Williams pressed the same measure in Atlanta. The bills would also bar DHS from revoking PreCheck or Global Entry status over First Amendment activity.

Who it affects: Canadian transborder air passengers directly, since NEXUS and Global Entry members are exactly the segment the trusted-traveller architecture was built to move quickly; Canadian tour operators selling United States air programmes; and United States airport-adjacent hotels and attractions.

Why it matters on both sides: This is the most consequential in-window development for the air channel, and it maps directly onto the one mode that has not recovered. Air returns from the United States are down 26.8% against 2024 and still falling year over year. Canadian travellers do not need to be personally at risk for enforcement at the screening line to change the perceived cost of an American air itinerary. The counter-pressure is real and bipartisan in its subject matter if not yet in its cosponsors, and it is the clearest advocacy opening of the cycle.

Track connection: It also complicates the FIFA legacy question. Any argument for making tournament-era entry facilitation permanent has to be made in an environment where the trusted-traveller brand is being contested in Congress.

3.E Fuel reversed direction, and the Iran channel is the reason

What changed: The IATA Jet Fuel Price Monitor shows the global average at US$146.93 per barrel, down 7.5% week over week, against US$160.06 and rising in the prior window. AAA's national averages on August 12 were US$4.036

for regular and US$5.358 for diesel, with regular easing 1.1% week over week. Both remain far above a year ago: regular up 28.5%, diesel up 44.2%.

Who it affects: Motorcoach and charter operators pricing autumn cross-border programmes, who buy diesel and are therefore still absorbing a 44% annual increase; drive-market gateway towns; and transborder carriers whose 2026 earnings guidance was rebuilt around elevated fuel.

Why it matters on both sides: The weekly reversal is welcome but it has not reached the pump in the mode that matters most to border tourism. Jet fuel resets quickly and diesel resets slowly, so the group and motorcoach segment will still be quoting autumn programmes off elevated costs while airlines begin to see relief. That gap favours air over coach at exactly the moment the air channel is impaired for other reasons.

Iran track: No material inbound tourism impact identified in this window. The conflict continues to reach North American cross-border tourism through fuel pricing rather than through airspace, advisories or source-market sentiment, and in this window that channel eased. United States carriers absorbed roughly [US$2.2 billion to US$6 billion in added annual fuel expense] earlier in the summer, which is the cost base the current relief is working against.

3.5 Bright Spots: Levers and Tailwinds

These signals are presented as levers and tailwinds, not as evidence that the broader crisis is easing. Five genuine in-window signals were identified; none is recycled from the prior window.

Signal	What it means for BBTC and how to use it
United States resident trips to Canada accelerating	2,663,946 trips in July, up 6.5%, with auto up 7.2% and air up 4.8%, against 2.182 million and up 5.1% in the June reference month. This is Tier 1, in-window, and it is the coalition's single best proof that cross-border demand responds to welcome. Use it as the constructive half of every message: the corridor is not broken, one direction of it is being suppressed. It also gives Canadian members a growth story to bring to their own governments rather than only a grievance.
Overseas arrivals into Canada, the net-new-money line	863,649 overseas-resident trips, up 5.7%, with the air channel up 6.8%. Unlike domestic substitution, this is genuinely new spending entering North America. For a binational coalition it is the strongest available argument that facilitation investment pays: the countries that made entry easier are capturing the incremental long-haul visitor. Pair it with the United States inbound weakness to make the facilitation case without partisanship.
Jet fuel reversed: down 7.5% week over week	US$146.93 per barrel against US$160.06 and climbing a fortnight ago. If the reversal holds through the autumn it eases the cost floor under transborder capacity decisions and gives carriers room to reconsider routes withdrawn for winter. Watch it weekly rather than banking it: the same monitor moved 7.1% in the opposite direction in the prior window.
Named-operator evidence of a real American offset	Ambassatours Gray Line in Halifax reports passenger counts 29% ahead of last year, attributed to American visitors using the exchange rate and to Canadians staying home. Operator-level, on the record, and in-window. This is the kind of proof point that survives scrutiny in a legislative meeting where an aggregate percentage will not. Seek two or three equivalents from member operators in gateway markets before the next cycle.
Congressional counter-pressure on airport enforcement	Three House measures in nine days to sever TSA to ICE passenger data flow, plus an oversight demand to a newly confirmed administrator. The coalition does not need to take a position on immigration enforcement to note that trusted-traveller integrity is a transborder commerce issue. This is a live legislative vehicle with an open door, and it is the only in-window development that offers BBTC a place to stand without waiting for the Resiliency Act calendar.

SECTION 4 Narrative Shift and Urgency Assessment

How the issue is framed this period. The dominant frame flipped inside this window, and not in the coalition's favour. For fifteen months the story was collapse. On August 11 the story became recovery: Skift led with travel ticking up again, Forbes with Canadian visitors up 10%, and Longwoods International's chief executive supplied the quotable line that there are indicators the bleeding may have stopped. Every one of those pieces carried the 2024 caveat, and none of them led with it. The risk to BBTC is specific and immediate: a recovery frame removes urgency from a legislative agenda that has not yet produced a markup, while the underlying air channel continues to deteriorate.

Whether urgency is rising or falling. Falling in perception, holding or rising in substance. The substantive case is unchanged: air returns are 26.8% below 2024 and still negative year over year, carriers have removed transborder capacity through the winter season, and a tariff escalation lands on August 19. What has changed is the availability of a number that sounds like good news. Base-year discipline is now the coalition's most valuable analytical asset, because it is the difference between being early and being contradicted.

Policymaker engagement signals. Congress is in its August period and the USMCA Travel and Tourism Resiliency Act saw no in-window action. The commitment from the United States Trade Representative to support the bill, given at Senate Finance on July 22, remains the highest-value uncashed asset in the file and it is now three weeks old. Engagement energy this window went instead to airport enforcement, where three members introduced or promoted legislation in nine days. On the Canadian side the Prime Minister's office is fully absorbed by the tariff track, which crowds out tourism-specific asks but also creates a hook for them.

Industry unity or fracture points. The binational asymmetry is becoming a genuine fracture risk. Canadian members are looking at a growing inbound business, a record domestic season and a government in a trade confrontation; United States gateway members are looking at a fourth consecutive year-over-year gain that does not reach their hotel nights. A coalition message built only on shared loss will start to ring false to half the membership. The message that still unites both sides is that friction suppresses volume and facilitation restores it, which this window demonstrates in both directions at once.

STANDING FLAG: THE INDIGENOUS PILLAR AND THE COALITION'S OWN SILENCE

No fresh Jay Treaty or Indigenous tourism development was identified inside this window. This is reported as a gap rather than filled. The standing position is unchanged: ITAC paused operations on May 8, 2026 with no federal allocation for 2026-27 and co-chair Keith Henry working unpaid, and the February 26, 2026 Assembly of First Nations and Jay Treaty Border Alliance objection to Canada's passport advisory remains unresolved. Separately, this desk documented zero BBTC or member advocacy actions for the second consecutive window; the most recent traceable coalition statement is dated March 2026. Both items are structural risks to the coalition's credibility and are surfaced here for the analyst rather than buried.

SECTION 5 Strategically Important Items

Statistics Canada confirms the July uptick and names it a base-year effect

Statistics Canada, August 11, 2026   The Tier 1 anchor for this cycle: 6.8 million total international arrivals, Canadian returns from the United States up 10.2% but 28.9% (auto) and 26.8% (air) below July 2024, and United States resident trips up 6.5%. The agency's own base-year language is the single most useful sentence a BBTC spokesperson can quote this cycle.

Canadian travel to the United States ticks up again, but is far from a full recovery

Skift, August 11, 2026 The most analytically disciplined trade coverage of the release, and the source of the Flight Centre Canada datapoint that United States leisure bookings are up 5.7% while still 39% below two years ago. Useful for members who need the caveat in someone else's words.

Canadian visitors to the United States were up 10% in July, but new steep tariffs threaten the tourism lift

Forbes, August 11, 2026 Connects the July print directly to the August 19 tariff round and carries the Longwoods International quote now circulating in the recovery frame. Also restates the scale of the loss: US$4.5 billion in forgone Canadian spending against a 2024 base of US$20.5 billion.

American Oversight demands a full accounting of the TSA and ICE data-sharing agreement

American Oversight, July 31, 2026 Puts a number on the programme for the first time: records covering more than 31,000 travellers and more than 800 immigration arrests, with airport arrests in Boston, Las Vegas and Denver. Directed at David Cummins, confirmed as TSA Administrator the day before.

Larson announces the No TSA Data for ICE Act after covert ICE operations at Bradley International

Office of Rep. John Larson, August 5, 2026 The precipitating detail matters for tourism: TSA shared passenger names, addresses and credit card numbers, and detentions occurred from the security line without notice to the airport authority. This is the traveller-experience fact pattern, not an abstract privacy dispute.

Tlaib introduces H.R. 10040 to prevent TSA passenger data flowing to immigration enforcement

Michigan Advance, August 6, 2026 Twenty-five cosponsors at introduction, and the bill reaches beyond data sharing to bar DHS from revoking PreCheck or Global Entry over First Amendment activity. That second provision is what makes it a trusted-traveller integrity bill and therefore a transborder commerce bill.

Georgia congresswoman presses the case against ICE use of TSA data

Atlanta News First, August 11, 2026 Shows the issue acquiring a gateway-airport constituency: an immigration attorney reports seven client families detained at Hartsfield-Jackson. Airport-level pressure of this kind is what converts an introduced bill into a hearing.

Canada's tourism industry recorded a first-quarter boom, with named-operator confirmation

CP24 / CTV News, August 5, 2026 First-quarter 2026 tourism spending of C$29.5 billion, up 5.6%, with C$23.5 billion domestic, and Ambassatours Gray Line reporting passenger counts 29% ahead of last year. The operator quote is the most usable in-window gateway evidence on the Canadian side.

SECTION 6 Emerging Threats and Opportunities: 14 to 30 Days Ahead

- **August 19 sectoral tariffs.** The 50% tariffs on roughly US$20 billion of Canadian goods take effect seven days after publication absent a negotiated outcome. Watch for a second step down in Canadian travel intent in the days following, and for retaliatory measures that touch travel-adjacent categories.
- **The August StatCan print will flatter hardest.** August 2025 was the deepest month of the trough. The mid-September release for the August reference month will therefore produce the largest year-over-year gain of the cycle. Prepare the 2024 comparison in advance so the coalition is not reacting to a headline it could have anticipated.
- **Congressional return and the Resiliency Act calendar.** The single highest-value action available is converting the United States Trade Representative's July 22 commitment into a scheduled markup when Congress returns. That commitment ages badly and there is no in-window evidence anyone has moved on it.
- **TSA and ICE escalation or containment.** Three introduced measures, an oversight demand to a new administrator, and an airport-level constituency in Atlanta. Watch for a hearing request, a DHS or TSA

response that either confirms or disputes the 31,000-record figure, and any effect on NEXUS and Global Entry enrolment or renewals among Canadians.

- **Fuel trajectory into the autumn coach season.** Jet fuel has reversed; diesel has not. If diesel holds above US$5.30 the fall foliage motorcoach programmes that United States border states rely on will be quoted at costs their Canadian group buyers have not seen before. This is a concrete, quantifiable gateway threat and the best available motorcoach-side story for the next cycle.
- **Transborder capacity decisions for winter.** Carriers set winter schedules in this period. With air returns still 26.8% below 2024, further withdrawals are more likely than restorations, and each withdrawal makes the following season's recovery harder. Watch Air Canada, WestJet, Flair and the United States majors.
- **FIFA readiness horizon.** The tournament closed July 19 and nothing in this window addressed permanence. The live questions for the next 30 days are whether any tournament-era entry facilitation, expedited processing lane or ESTA and eTA modification is retained, whether CBP and CBSA publish operational after-action findings, and whether the WTTC border management report of June 11 is picked up by either government as a policy template. If nothing surfaces by the next cycle, report the gap plainly rather than the aspiration.
- **Indigenous tourism signals.** Watch for any federal response on ITAC's 2026-27 allocation, a private-funding close, or movement on the Jay Treaty Border Alliance objection to Canada's passport advisory. The coalition's Indigenous pillar has now gone multiple cycles without a positive development.
- **Competitive displacement.** Overseas-resident trips to Canada are up 5.7% while United States inbound weakens. Every cycle that gap persists, long-haul tour programming rebalances toward Canada in ways that are slow to reverse once catalogues are printed.

SECTION 7 BBTC Advocacy Intelligence

Three evidence-based messages the coalition could advance this period. Analytical, not promotional. Note that this desk documented zero BBTC or member advocacy actions inside the window, so all three are openings rather than continuations.

Message 1: The recovery is arithmetic. The air channel has not turned.

The credible message: Cross-border travel is not recovering; it is being measured against a collapse. Statistics Canada says so itself. Any policy judgment made on the July headline will be made on a number the issuing agency has already qualified.

Strongest proof points: Canadian auto returns 28.9% below July 2024 and air returns 26.8% below, both Tier 1 and both in the same release that produced the 10.2% headline. Statistics Canada's own base-year attribution. Flight Centre Canada's booking data: up 5.7% year over year, down 39% on two years. Carrier behaviour as the independent check, with eight Air Canada United States routes cut or postponed for the winter season.

Who should hear it now: Senate Finance and House Ways and Means staff ahead of the return from the August period; the Office of the United States Trade Representative, to hold the July 22 commitment against a fresh dataset; Global Affairs Canada; and the trade press that ran the recovery frame on August 11, where a well-sourced correction lands better than a complaint.

Message 2: Trusted-traveller integrity is a transborder commerce issue

The credible message: The coalition takes no position on immigration enforcement. It does take a position on this: when the trusted-traveller system that moves Canadian business and leisure travellers becomes a subject of contested enforcement, the air channel prices that in. The one mode that has not recovered is the one mode where this is happening.

Strongest proof points: Air returns from the United States down 26.8% against July 2024 and still negative year over year, against auto up 12.8%, a divergence within a single Tier 1 release. Records covering more than 31,000 travellers and more than 800 arrests as documented by American Oversight, carried with the honesty flag in Section 2. Provisions in H.R. 10040 that would bar revoking PreCheck or Global Entry over protected activity, which is precisely the trusted-traveller integrity point. Airport arrests documented in Boston, Las Vegas, Denver, Hartford and Atlanta, all markets with Canadian transborder service.

Who should hear it now: The offices of Representatives Larson, Tlaib and Williams, which have an active vehicle and no tourism-sector voice on it yet; TSA Administrator David Cummins, newly confirmed and taking his first positions; CBP trusted-traveller programme leadership; the Canadian Consulates General in Boston, Detroit and Atlanta; and airport authorities in Hartford, Boston and Atlanta, which have already been drawn in.

Message 3: Facilitation demonstrably works, in the same fourteen days

The credible message: The same release that shows suppressed southbound travel shows United States resident trips to Canada up 6.5% and overseas-resident trips up 5.7%. Cross-border demand is intact. Where entry is easy, volume grows; where it is uncertain, volume does not. This is the least partisan and most persuasive version of the coalition's core argument, and it is available as Tier 1 evidence from one dataset.

Strongest proof points: United States resident trips to Canada of 2,663,946, up 6.5% and accelerating from 5.1% in the June reference month. Overseas-resident trips of 863,649, up 5.7% with air up 6.8%, representing genuinely new spending rather than redistributed domestic spending. Operator-level confirmation from Ambassatours Gray Line at 29% ahead year over year. First-quarter Canadian tourism spending of C$29.5 billion, up 5.6%, with the domestic and international split preserved so the new-money claim stays defensible.

Who should hear it now: Destination Canada and provincial marketing organisations, as the constructive counterpart; United States state tourism offices in Washington, Montana, North Dakota, Minnesota, Michigan, New York, Vermont and New Hampshire, who need an argument their delegations can carry that is not purely a complaint; the Brand USA and United States Travel Association research desks; and the FIFA legacy conversation, where the case for retaining tournament-era facilitation is exactly this argument with a deadline attached.