



THE ROAD AHEAD

# Canadian Travel Sentiment Study

WAVE 3

NOV 13, 2025

Longwoods  
INTERNATIONAL

# Key Highlights



- **Almost One Quarter (23%) of Canadian Travelers Indicated They Canceled Their Travel Plans to the U.S.**  
In the past six months, 23% of Canadian travelers surveyed canceled a previously planned trip to the U.S. Looking ahead, 56% do not intend to visit in the next year.
- **Policy and Politics Continue to Deter Visits, but Indifference is Growing**  
53% of Canadian travelers report U.S. government policies, trade practices, or political statements make them less likely to travel to the U.S.—a drop from 63% in July and 60% in April. The share saying U.S. policies have no influence on their intent has increased to 23%, signaling a modest shift toward indifference.
- **Domestic Substitution Remains Top Alternative**  
37% of Canadian travelers now say they would substitute a planned U.S. trip with a domestic trip—down from 42% in July—but still the most chosen alternative. Only 22% are shifting to new international destinations, and trip cancellations have held steady since July at 19%.
- **Europe Retains Lead as Most Considered International Alternative**  
Among those replacing the U.S. with international travel, Europe remains the top alternative, followed by Mexico and the Caribbean.
- **U.S. Draws Praise for Attractions but Remains Perceived as Unwelcoming**  
While 85% say the U.S. offers abundant attractions, only 39% see it as welcoming to travelers of diverse backgrounds, and just 44% feel welcomed as Canadians, highlighting an enduring gap between destination appeal and hospitality perceptions.

# 23% Of Canadian Travelers Canceled Their U.S. Plans In The Last 6 Months

Did you travel to the U.S. in the last 6 months?

No, I did not travel to the U.S. and did not intend to travel to the U.S.

47%

No, I intended to travel to the U.S., but I canceled my plans

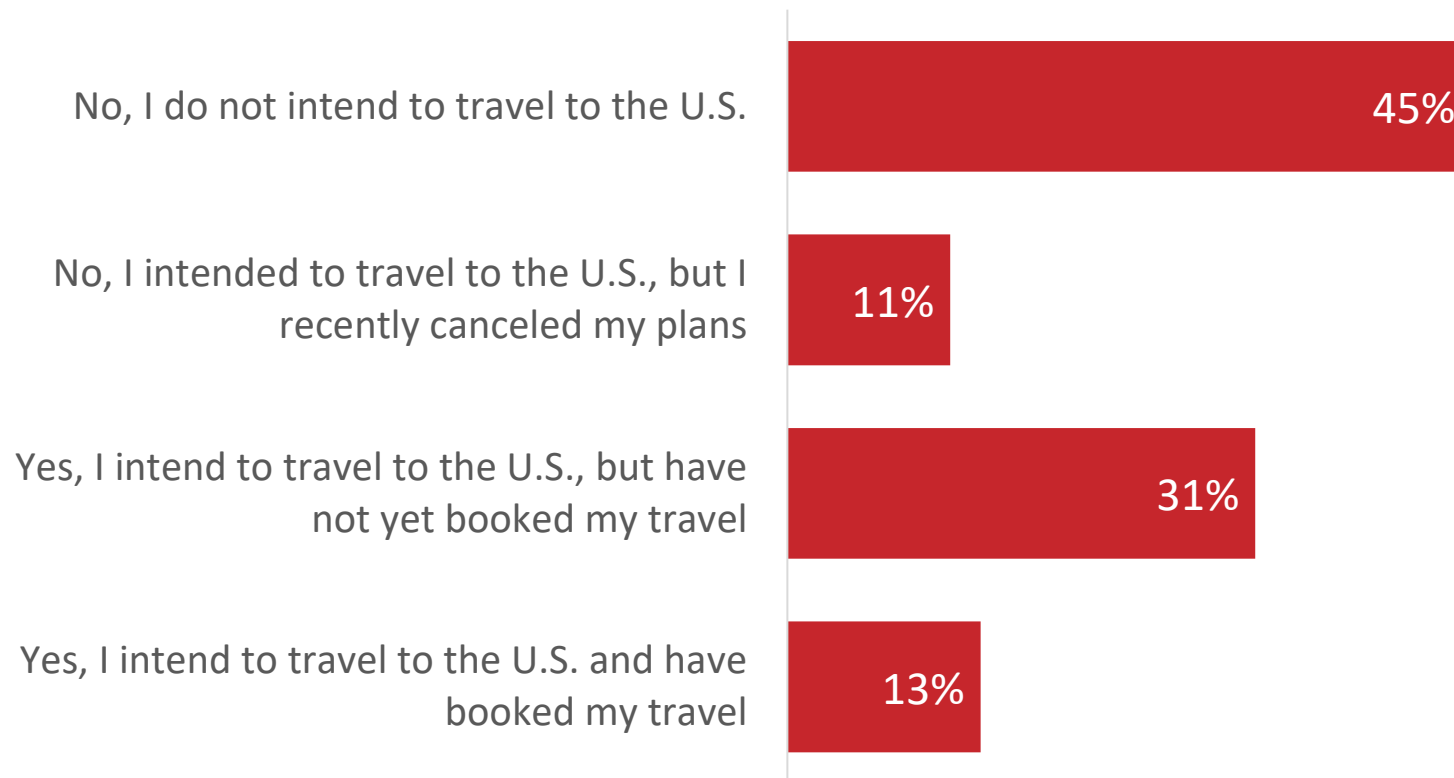
23%

Yes, I traveled to the U.S.

29%

# Nearly Half of Canadian Travelers Do Not Intend to Travel to the U.S. in the Next Year

In the next 12 months, do you intend to travel to the U.S.?

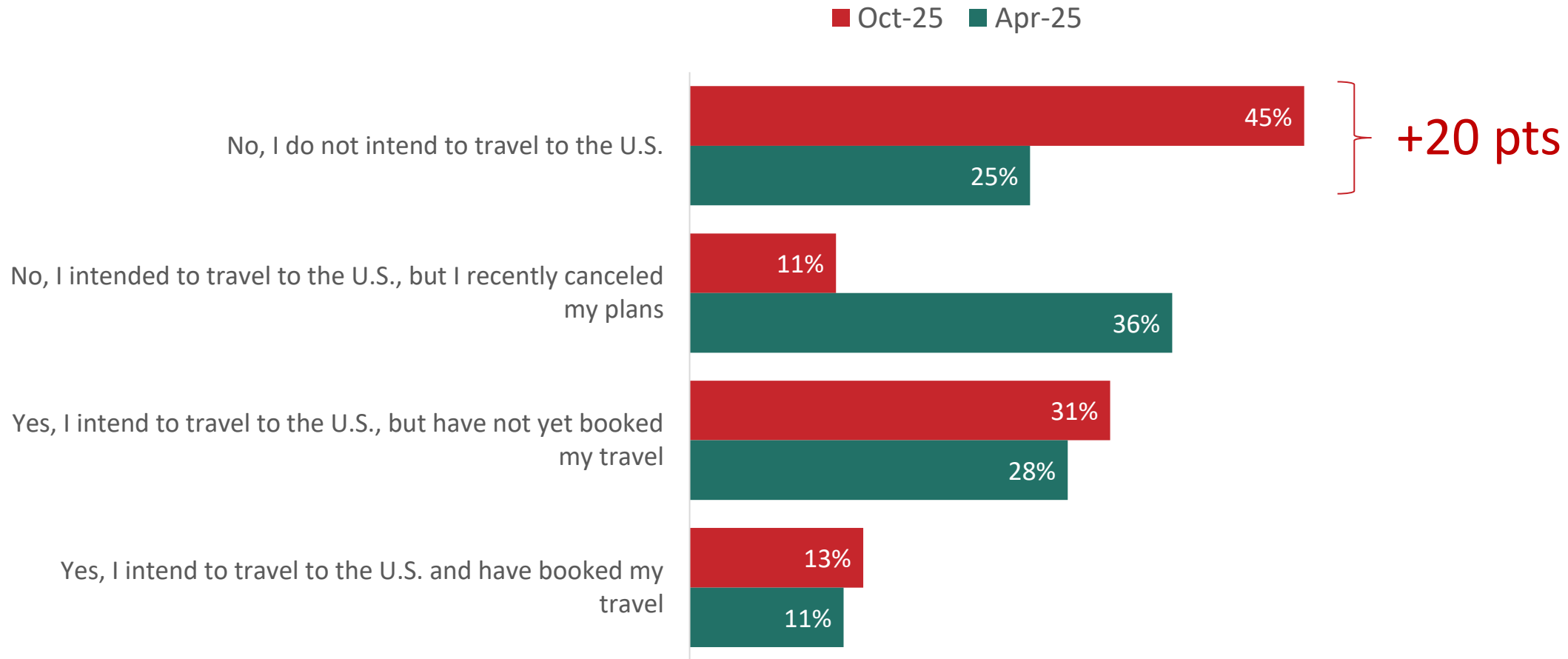


In the next twelve months, **56% of Canadian travelers** do not intend to travel to the U.S., **11%** of which previously intended to visit, but recently canceled their plans.

**44% of Canadian travelers** do have intentions to travel to the U.S., of which **13%** have already booked their travel.

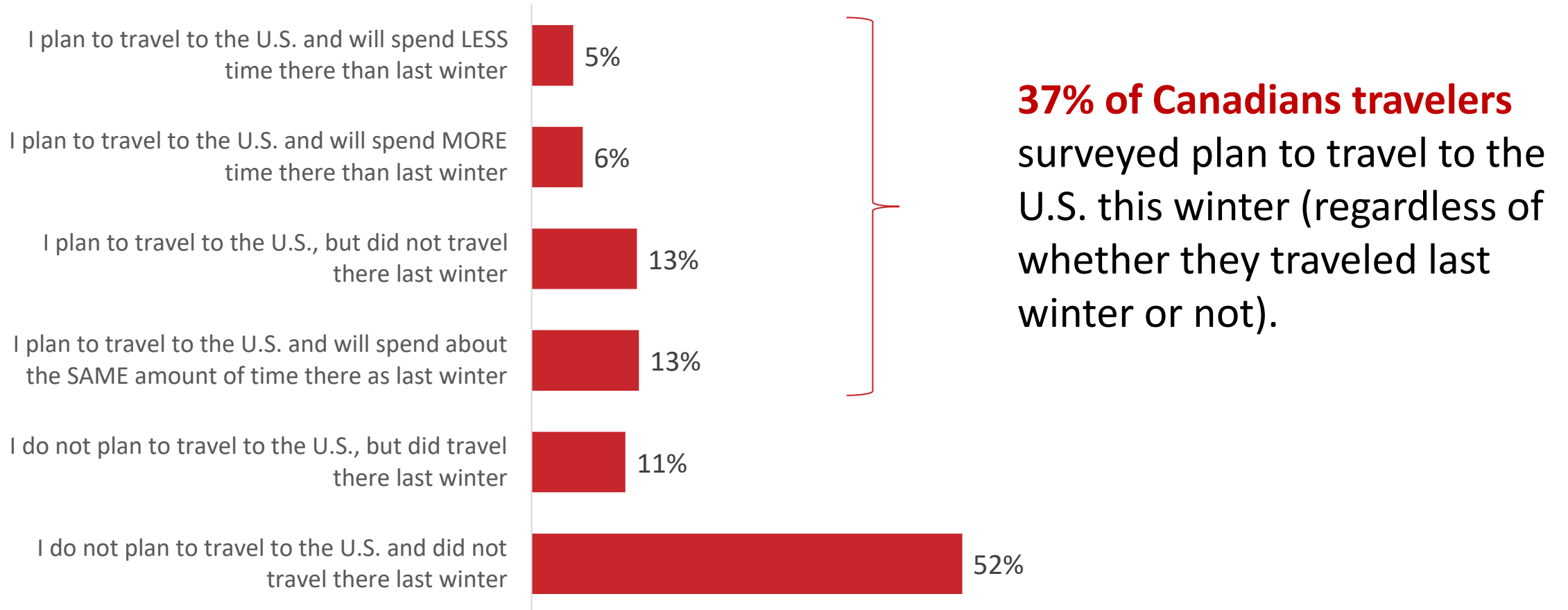
# Intent to Travel to the U.S. Continues to Decline

In the next 12 months, do you intend to travel to the U.S.?



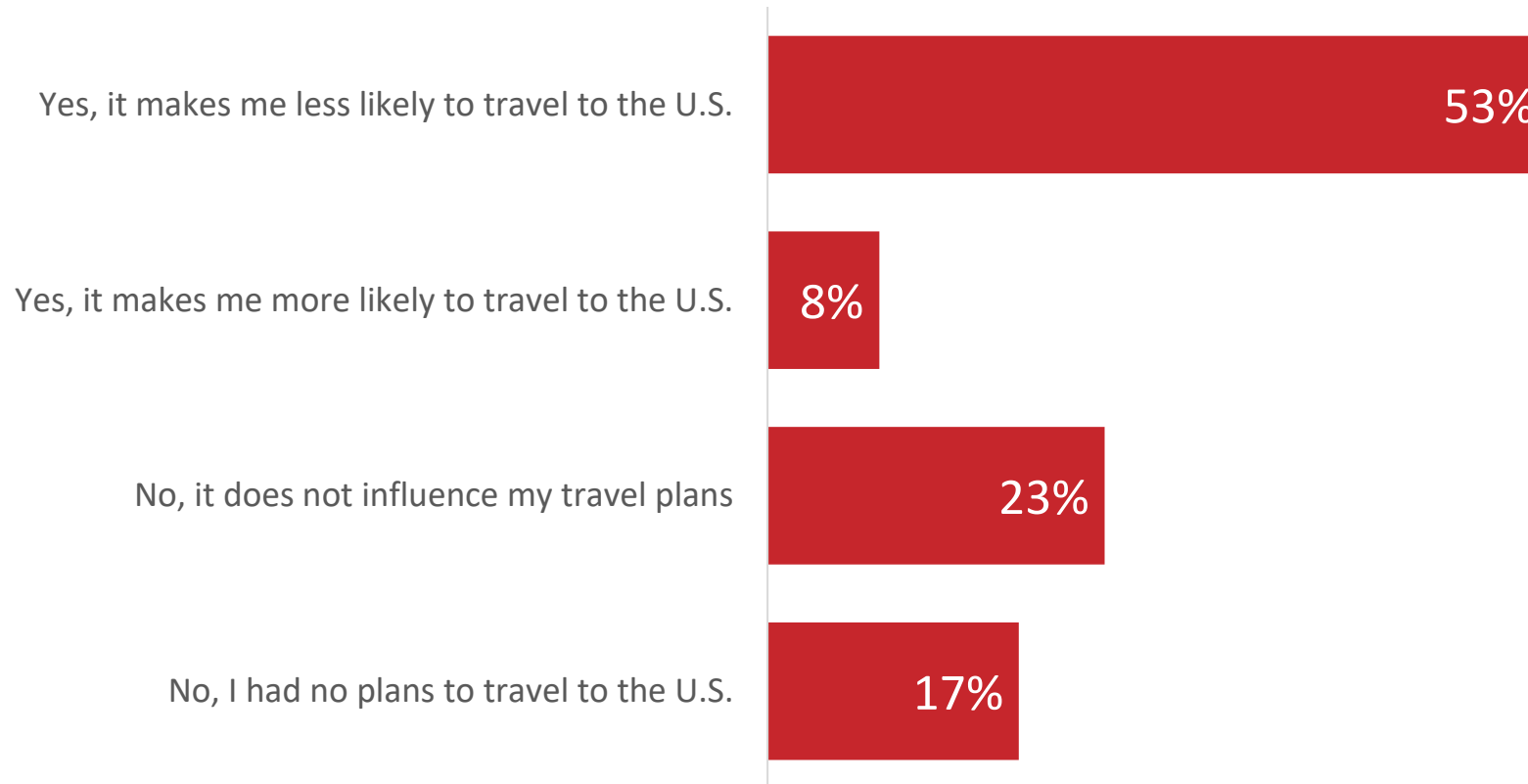
# 37% Plan U.S. Winter Travel

Thinking about the upcoming winter season, how do your travel plans to the U.S. this winter compare to last winter?



# U.S. Policies and Politics Continue to Deter Canadian Travelers

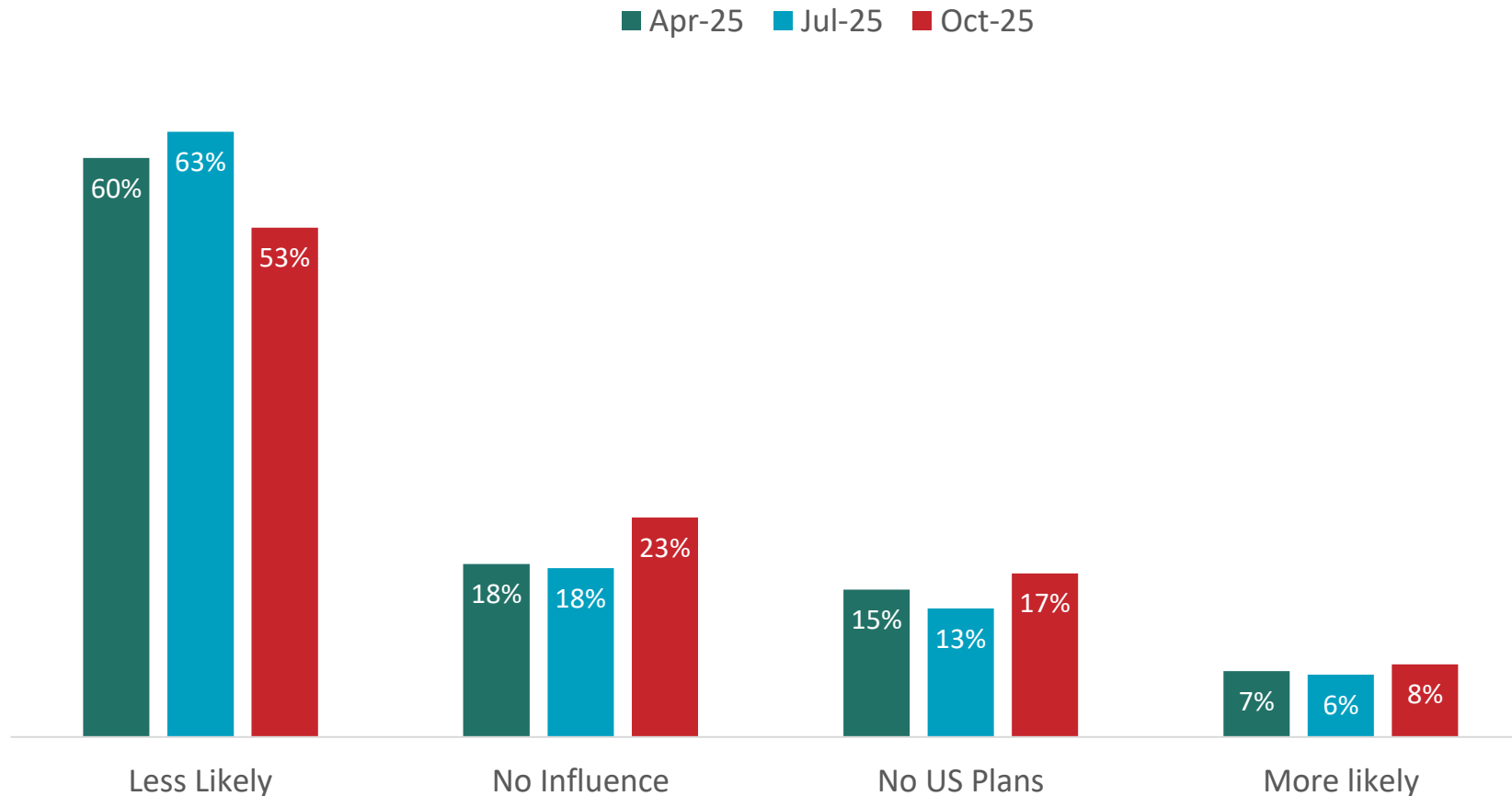
Are current U.S. Government policies, trade practices, and/or political statements influencing you to change your travel plans to the U.S. in the next 12 months?



**53% of Canadian travelers** responded that they are **less likely to visit U.S.** due to policy and politics.

# Majority of Canadian Travelers Still Deterred by U.S. Policies, But Less So

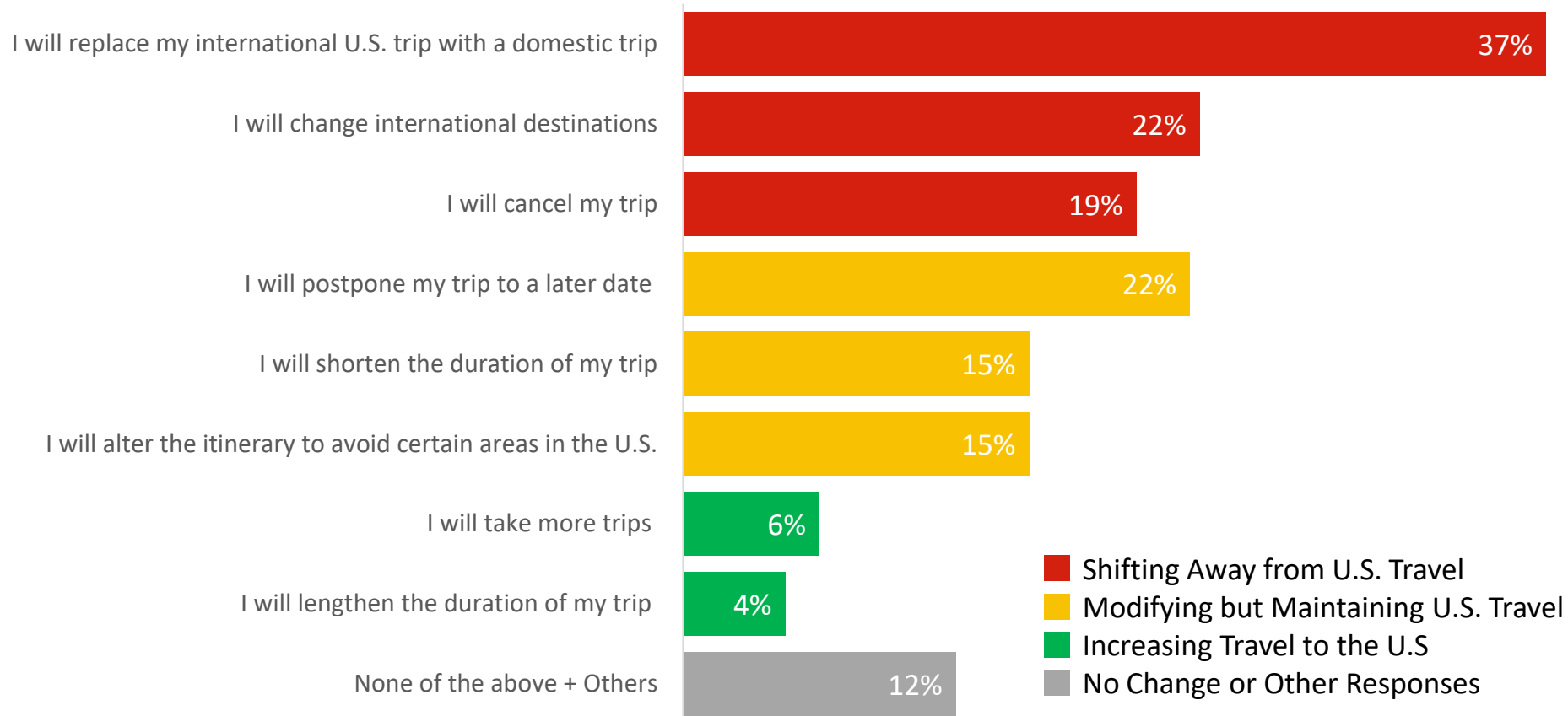
Are current U.S. Government policies, trade practices, and/or political statements influencing you to change your travel plans to the U.S. in the next 12 months?



In the most recent October 2025 study, **53% of Canadian travelers** say U.S. government policies make them **less likely** to travel to the U.S.—a significant change **compared to 63% in July and 60% in April**. At the same time, the share who say these policies have **no influence** on their travel plans has grown **from 18% in April and July to 23% in October**, indicating a modest shift toward indifference among Canadian travelers.

# Canadian Travel Adaptations: Domestic Substitution Remains Top Alternative

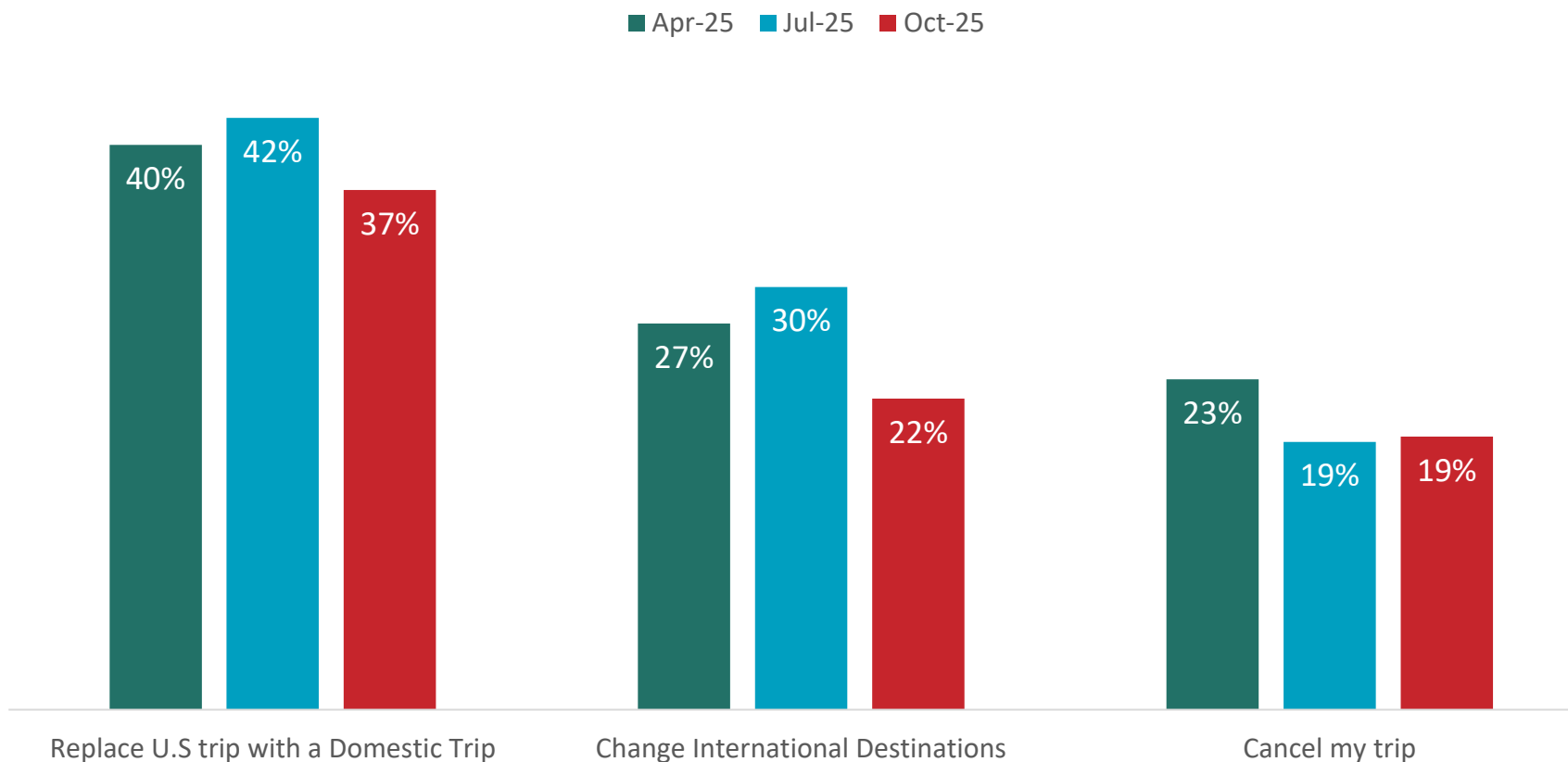
**You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?**



Note: Respondents could select multiple options; therefore, percentages may not sum to 100%.

# Fewer Canadian Travelers Are Choosing Domestic Over U.S. Trips, But It Remains the Top Alternative

**For respondents shifting away from U.S. travel:** You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



In October 2025, **37% of Canadian travelers** plan to replace their U.S. trip with a domestic one—a **drop from 42% in July and 40% in April**, but still the top alternative to U.S. travel. The share changing international destinations from U.S. **fell to 22%**, and cancellations held steady or declined, indicating a softening intent to shift away from the U.S.

# Alternative International Destinations: Europe, Mexico, and Caribbean Most Mentioned

You indicated you will change international destinations. Please specify the international destination you are considering in place of your original U.S. trip.

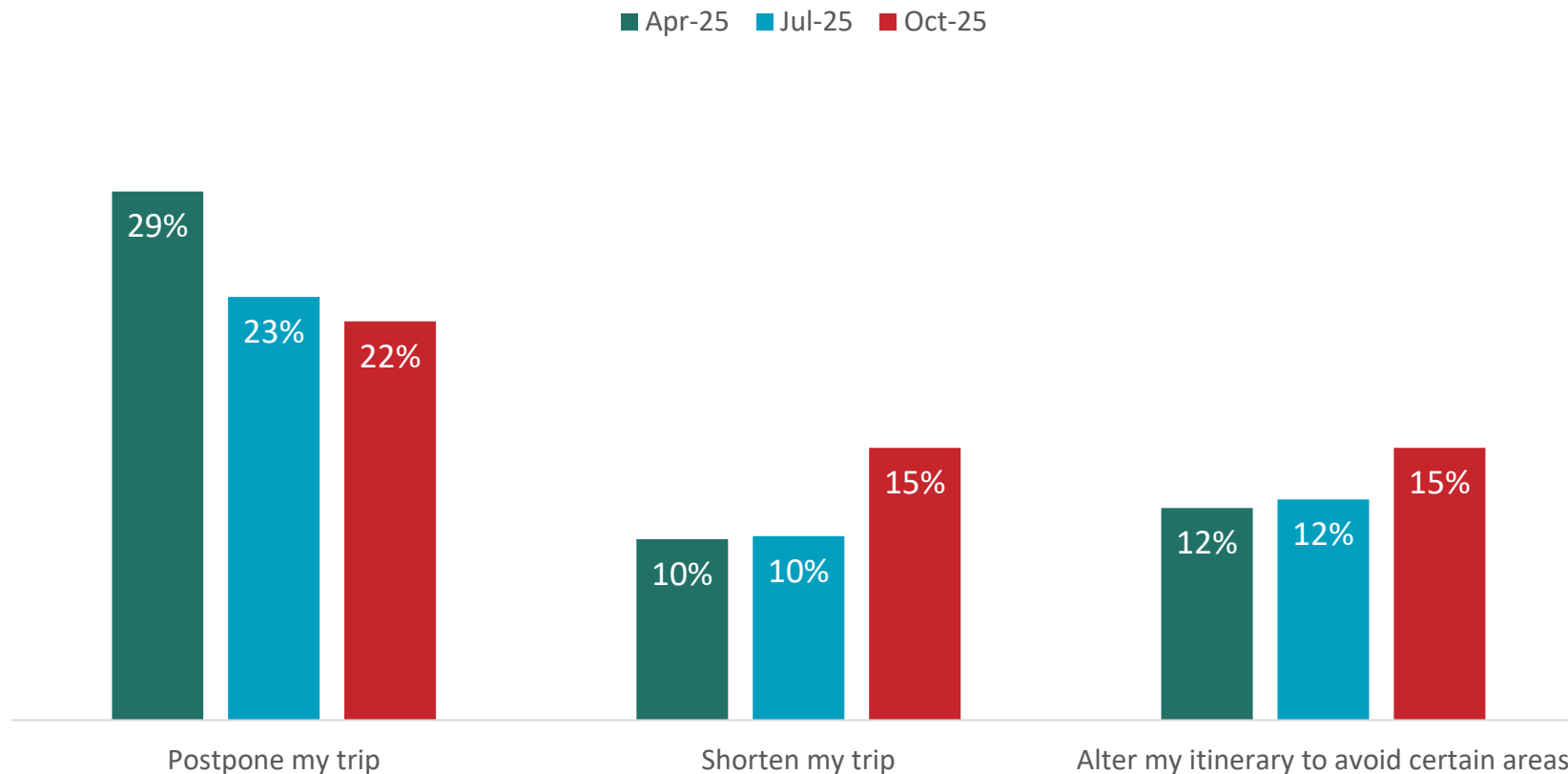


- **Europe was the most frequently mentioned** alternative destination, with both the region and specific countries highly represented.
- **Mexico and the Caribbean** were also commonly named as alternatives to U.S. travel.
- Additional favored destinations include **Asian countries** like Vietnam, Japan, and Singapore.

Note: This data reflects responses to an open-ended question about preferred travel destinations, where respondents mentioned countries they are interested in visiting instead of the U.S. The font size corresponds to the frequency of each country's mention, highlighting the most popular destinations among Canadian travelers. Grouped or ambiguous answers (e.g., "Europe or Asia", "Japan Mexico Costa Rica") were split, and country spellings/synonyms were standardized.

# Postponement of U.S. Trips Declines; More Canadian Travelers Plan to Shorten Travel

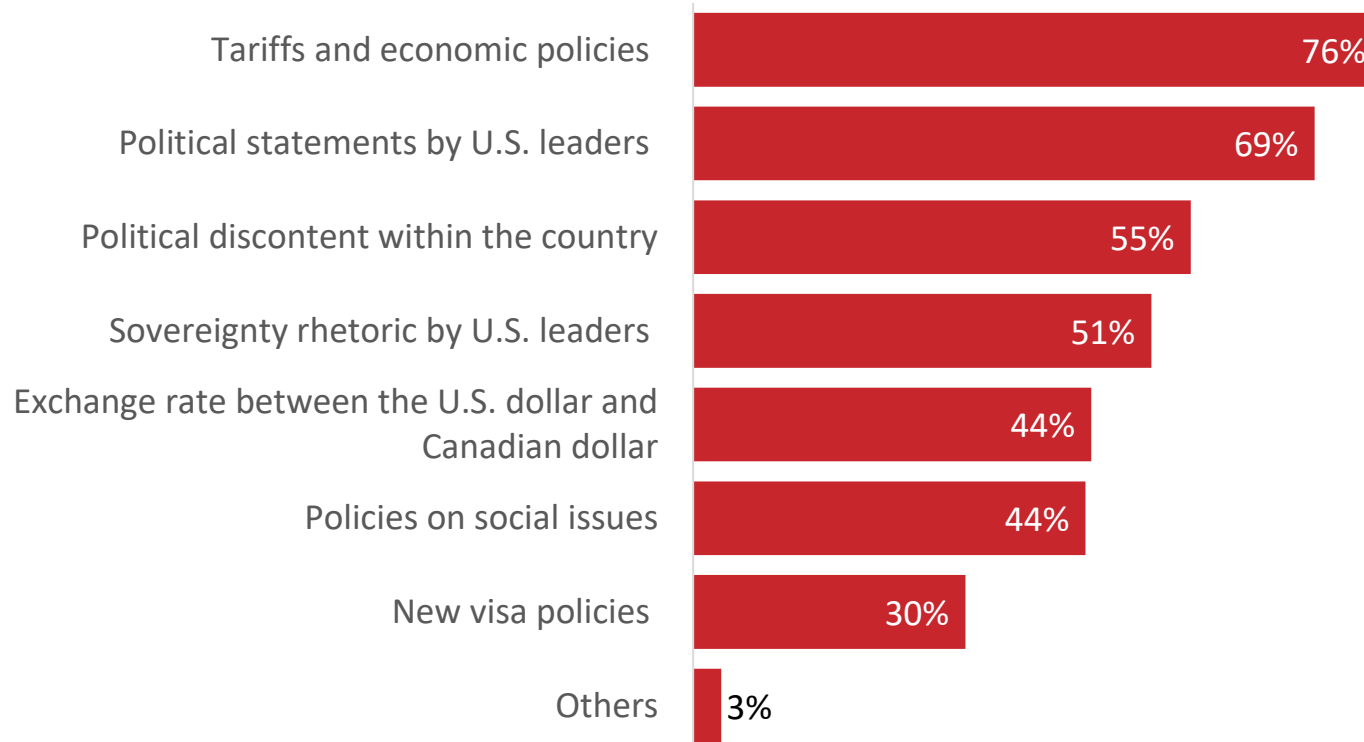
**For respondents modifying but maintaining U.S. Travel:** You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



The percentage of **Canadian travelers postponing their U.S. trip declined to 22%** in October 2025, down from 29% in April. At the same time, **more travelers are shortening their trips** (15% in October vs. 10% in July and April) or altering their itineraries to avoid certain areas in the U.S. (15% vs. 12% in July and April). These figures reflect a modest shift in how Canadians are adapting their U.S. travel plans.

# Tariffs and U.S. Politics Shape Canadian Travel Plans

You indicated that you will change your travel plans to the U.S. in the next 12 months. Which of the following U.S. government policies, trade practices, and/or political statements caused you to change your travel plans?

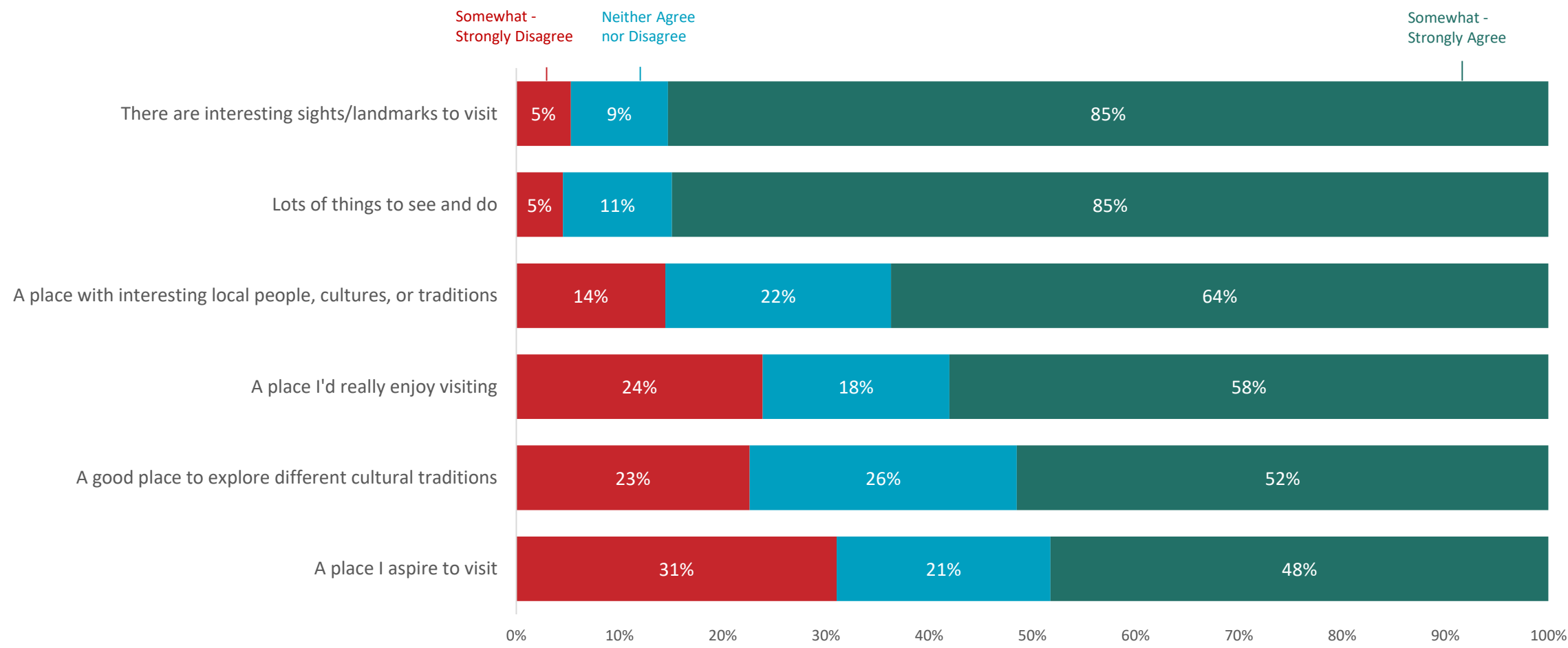


While economic policies and political rhetoric are the leading factors, the **exchange rate between the U.S. dollar and Canadian dollar (44%)** and **policies on social issues (44%)** are also important considerations influencing Canadian travelers' travel decisions.

Note: Respondents could select multiple options; therefore, percentages may not sum up to 100%.

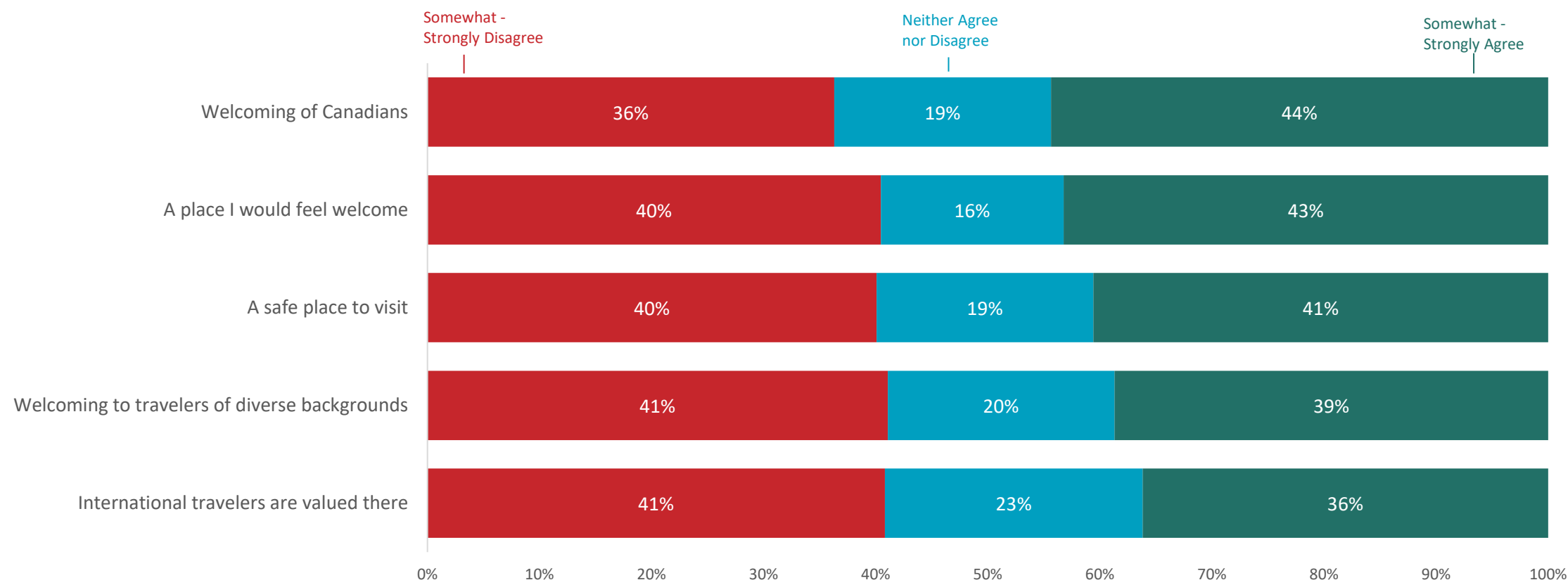
# U.S. Widely Perceived by Canadian Travelers as Rich in Attractions and Experiences

Please provide your personal impressions of the United States as an international tourism destination.



# Many Canadian Travelers Perceive the U.S. as Unwelcoming and Less Inclusive

Please provide your personal impressions of the United States as an international tourism destination.





## Canadian Travel Sentiment Study

# Methodology

### Key Details:

- Survey Date: Oct 9-15, 2025
- Sample Size: 1,000 Canadian adults (18+)
- Margin of Error:  $\pm 3\%$
- Representative of Canadian population demographics (age, gender, province)

Travelers are only respondents that have taken a trip in the last 3 years and intend to take a trip in the next 2 years.



## Additional Resources

Longwoods International Research  
[www.longwoods-intl.com/travel-sentiment](http://www.longwoods-intl.com/travel-sentiment)

Miles Partnership Research and Insights  
[www.MilesPartnership.com/How-We-Think](http://www.MilesPartnership.com/How-We-Think)

*This study is supported by Miles Partnership.*

A person wearing a red jacket, a beanie, and a scarf stands on a rocky outcrop, looking out over a vibrant turquoise lake. The lake's surface is calm, perfectly reflecting the surrounding landscape. In the background, majestic, rugged mountains with patches of snow and glaciers rise above a dense forest of evergreen trees. The sky is overcast with soft, grey clouds. The overall scene is serene and breathtaking, capturing a moment of quiet reflection in a stunning natural setting.

# Thank You!