



THE ROAD AHEAD

Canadian Travel Sentiment Study

WAVE 6

AUG 11, 2026

 **Longwoods**
INTERNATIONAL

Key Highlights



Canadian Travel Sentiment Study July 2026

➤ Recent Travel Activity Improves Year-Over-Year

28% of Canadian travelers visited the U.S. in the last 6 months, up from 23% in July 2025, while 51% did not travel and had no intent, down from 60%.

Intent to Travel to the U.S. Increases from April 2026

49% intend to visit in the next 12 months, up from 43% in April 2026. 37% have not yet booked their travel and 12% have already done so.

U.S. Policy Deterrence Declines as No Influence on Travel Plan Rises

56% say U.S. policies make them less likely to travel, down from 63% in July 2025, while 25% say policies have no influence, up from 18% in July 2025.

Switching to Other International Destinations Declines While Domestic Substitution Remains the Top Alternative

Only 16% would switch to an international destination other than U.S., down from 25% in April 2026, while 37% would replace a U.S. trip with a domestic trip, down from 42% in July 2025.

Avoidance of Certain U.S. Areas Increases

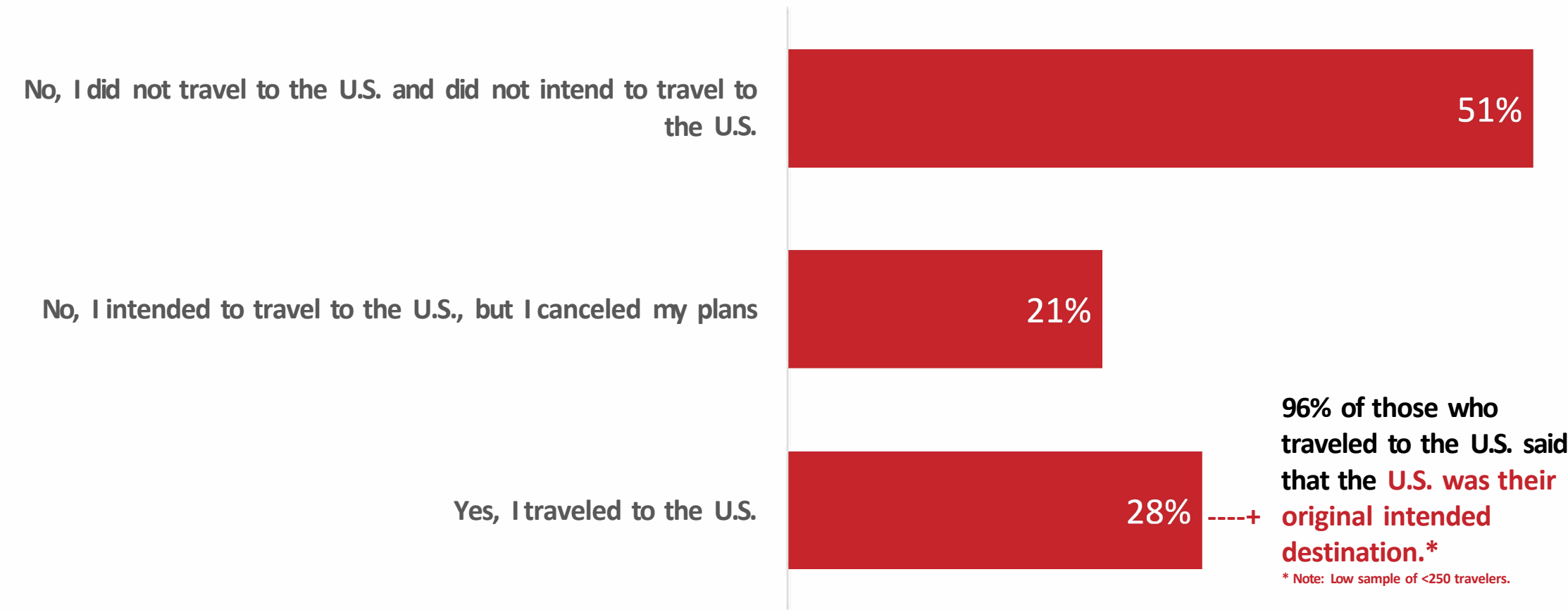
19% of policy-concerned travelers say they will alter their itinerary to avoid certain U.S. areas, up from 11% in January 2026.

Recognition of U.S. Attractions Peaks While Safety Concerns Persist

Agreement that the U.S. has "lots to see and do" reached a study-period high of 91%, while only 37% agree the U.S. is a safe place to visit.

Recent U.S. Travel Activity: 28% Traveled, 21% Canceled

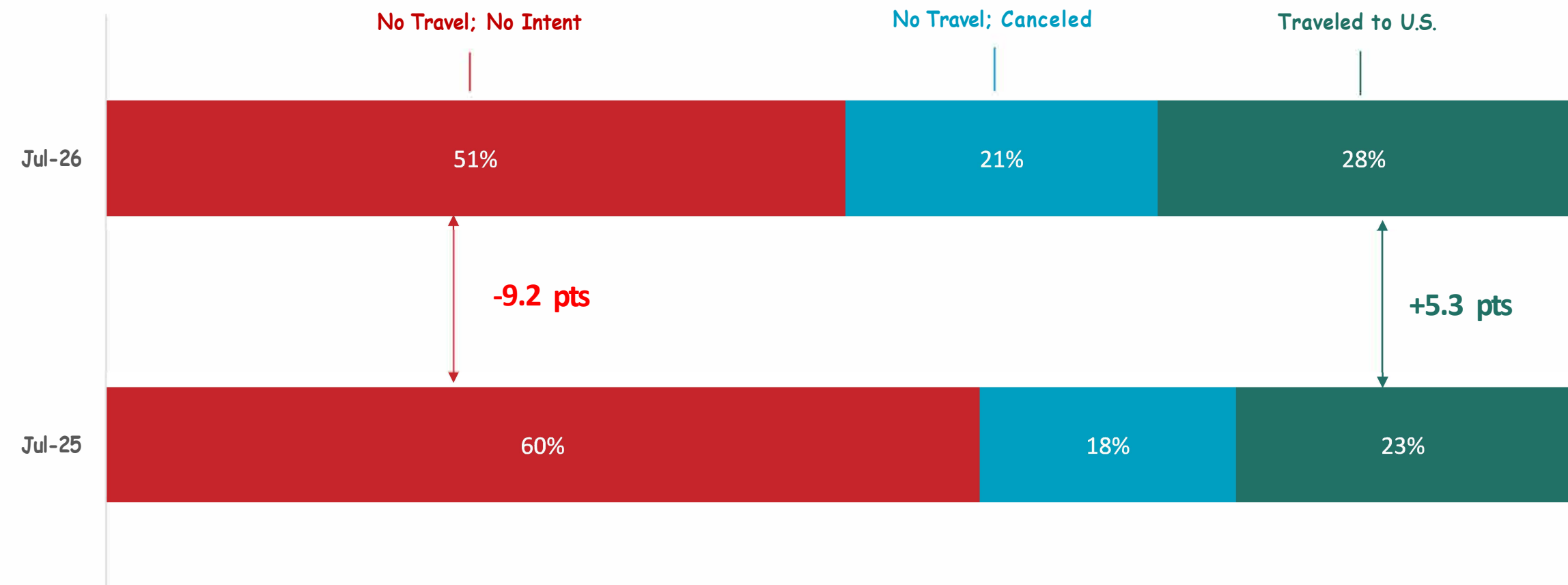
Did you travel to the U.S. in the last 6 months?



King £9,2

Recent U.S. Travel Rises as Non-Travel Declines Year-Over-Year

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



Leading £9,2

Canadian Travel Sentiment Study July 2026 vs previous waves/ Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

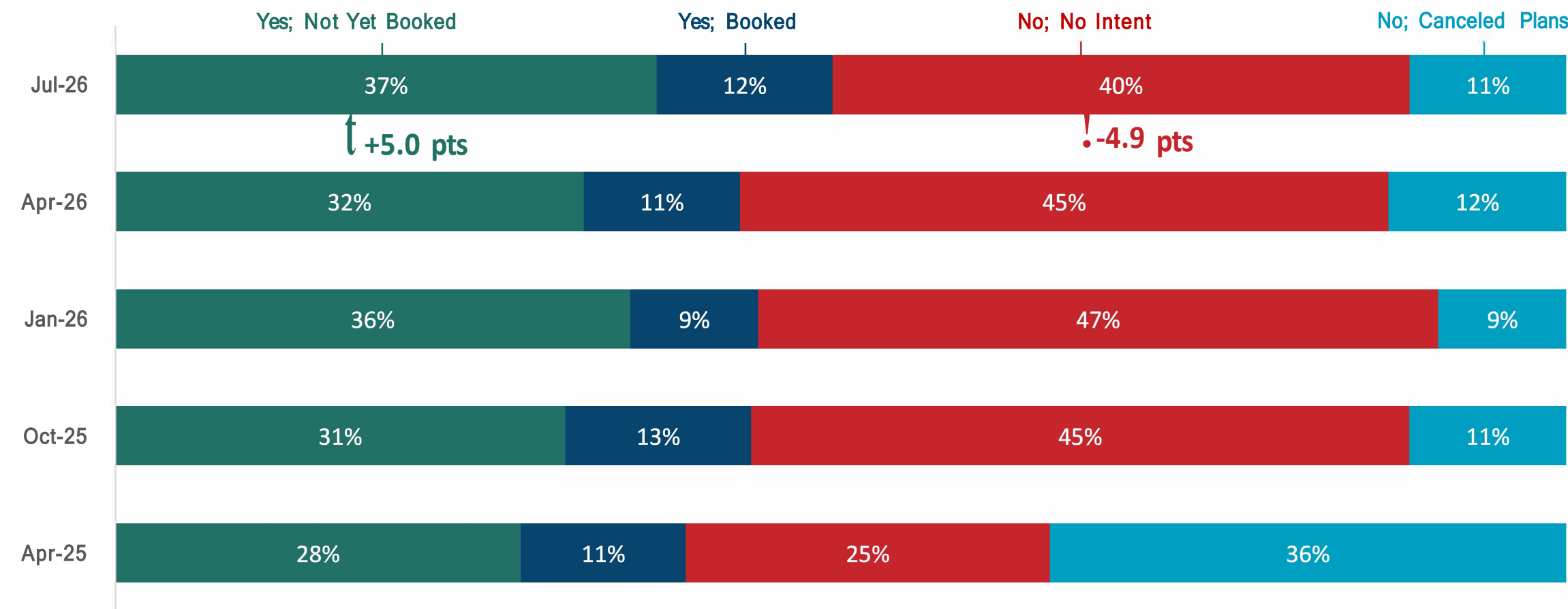
49% of Canadian Travelers Intend to Travel to the U.S. in Next 12 Months

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



Intent to Travel to the U.S. Increases from April 2026

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

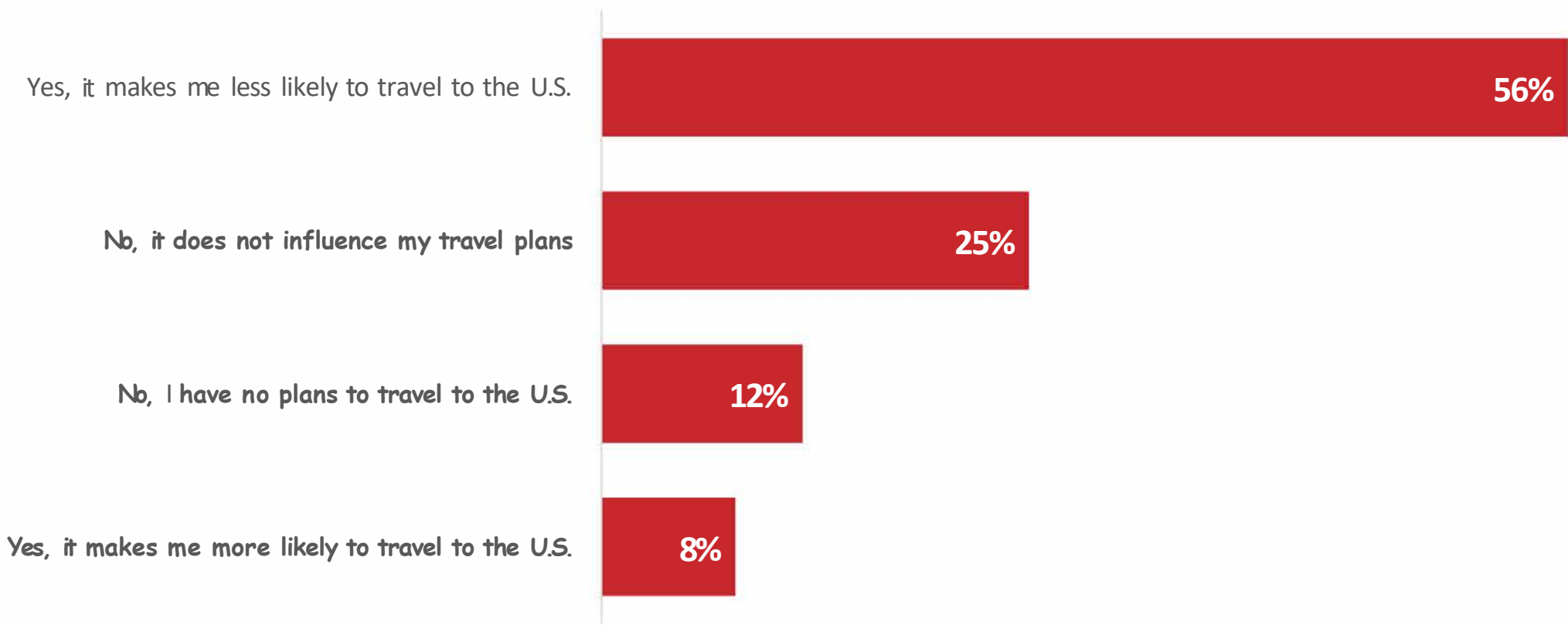


King £9,2

Canadian Travel Sentiment Study July 2026 vs previous waves / Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

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

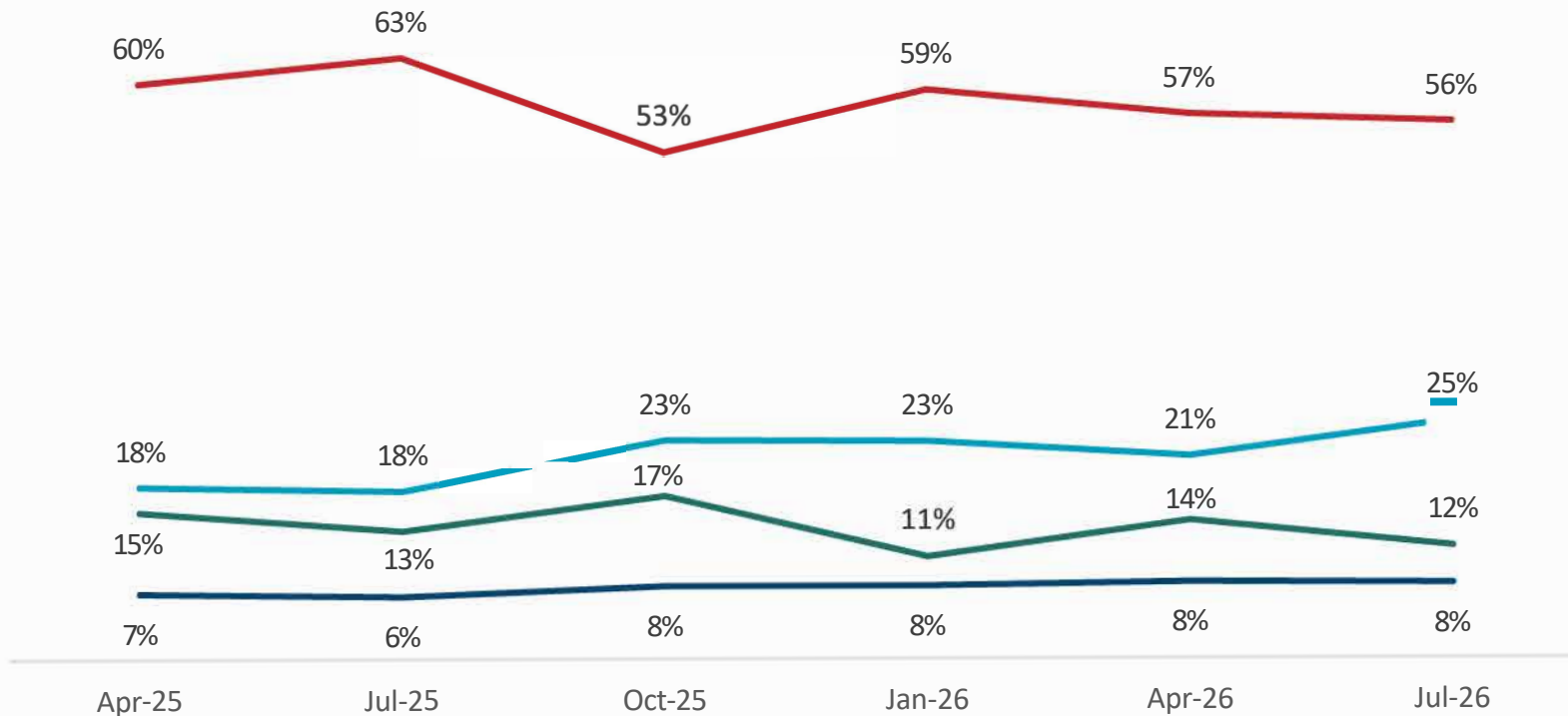
Are current U.S. Government policies, trade practices, and/or political statements influencing you to change your travel plans to the U.S. in the next 12 months?



U.S. Policy Deterrence Declines from July 2025 as No Influence on Travel Plan Rises

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?

- Less Likely to Travel to U.S. - No Influence on Travel Plans - No Plans to the U.S. - More Likely to Travel to U.S.

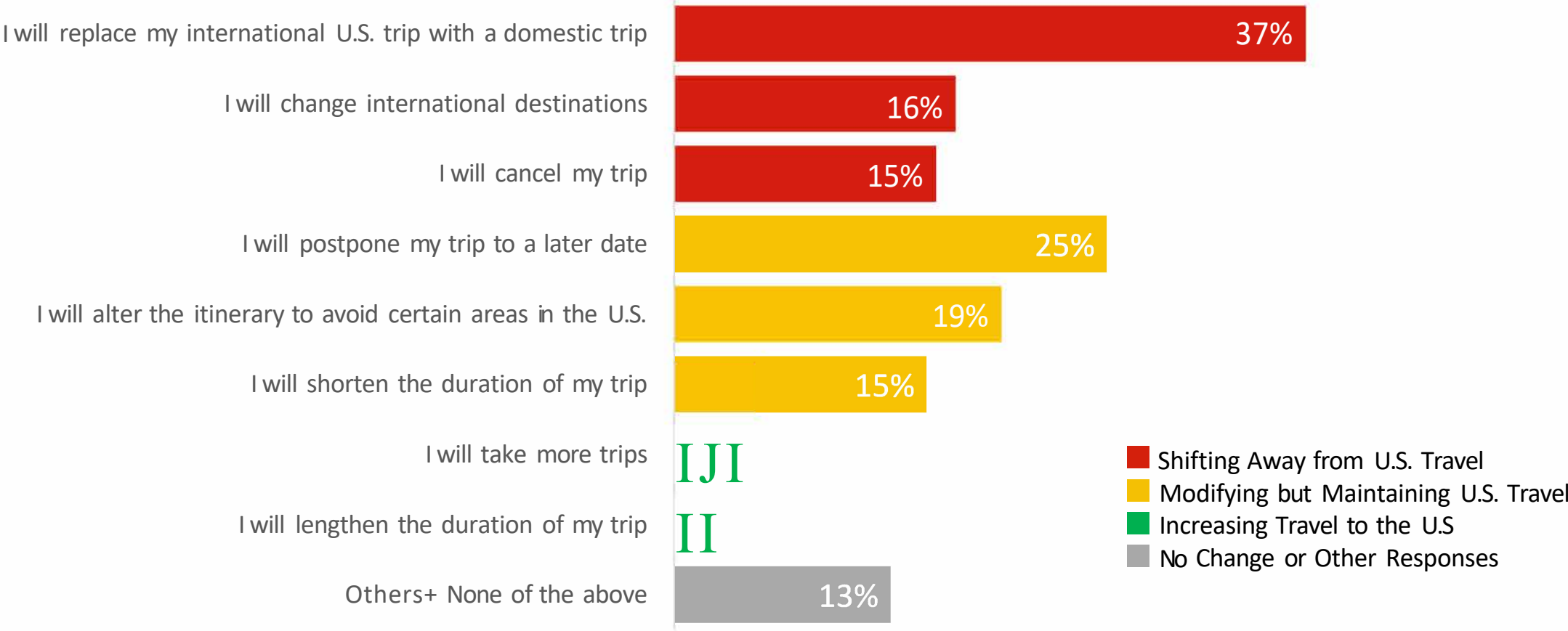


Compared with July 2025, the share of Canadian travelers who say U.S. policies make them **less likely to travel declined from 63% to 56%**, while the share saying policies have **no influence increased from 18% to 25%**.

King £9,2

Canadian Travel Adaptations: Domestic Substitution Remains Top Alternative

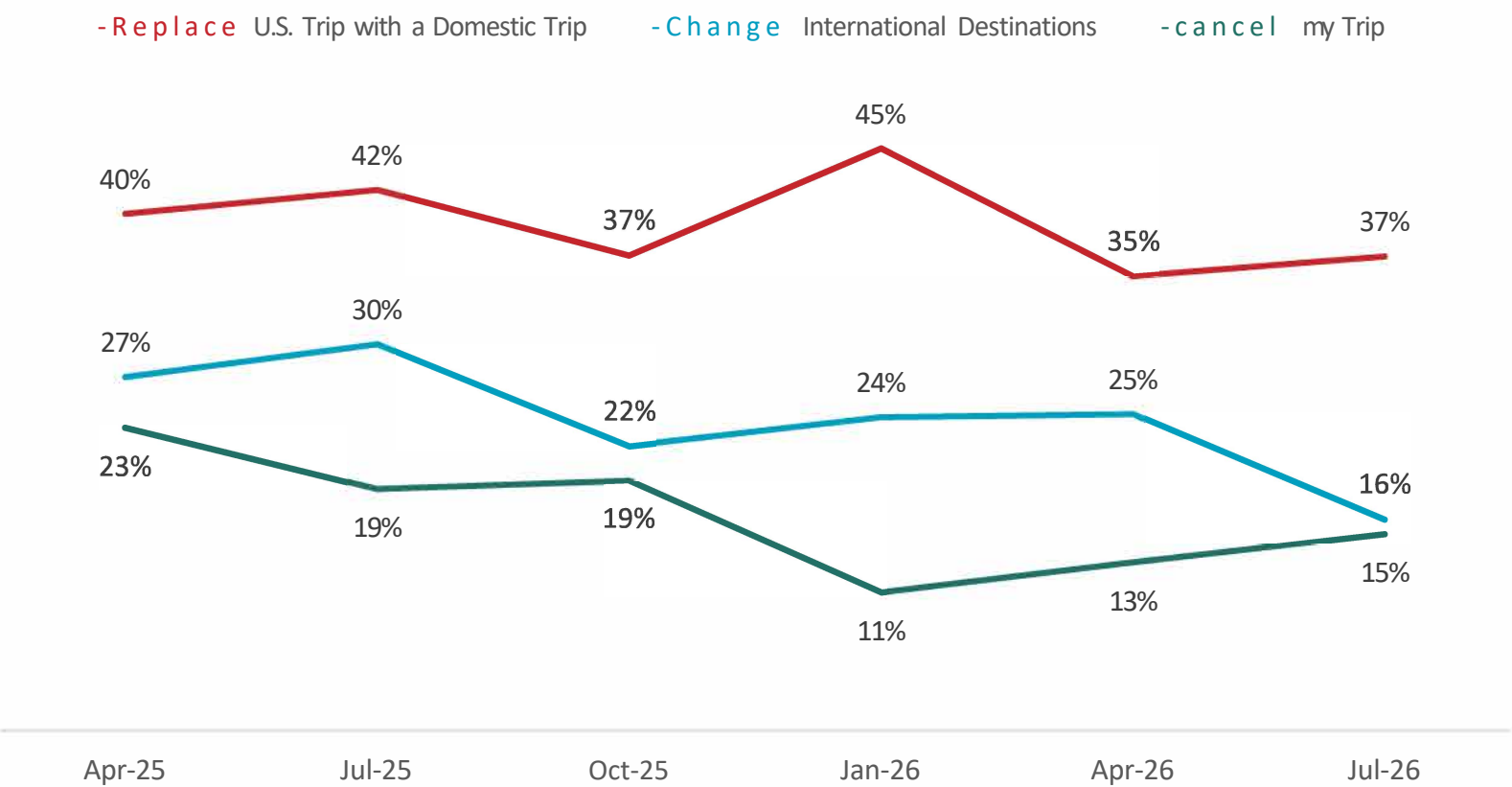
You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



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

Shift to International Destinations Falls from April 2026

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?



Only 16% of affected travelers say they will switch to another international destination, down from 25% in April 2026. Domestic replacement remains the **top alternative at 37%**, while **15% say they will cancel their trip.**

Leading £9,2

Canadian Travel Sentiment Study July 2026 vs previous waves / Percentages are based only on respondents who are confirmed travelers and indicated U.S. policies and politics are influencing their travel plans

Alternative International Destinations: Europe and Mexico 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.

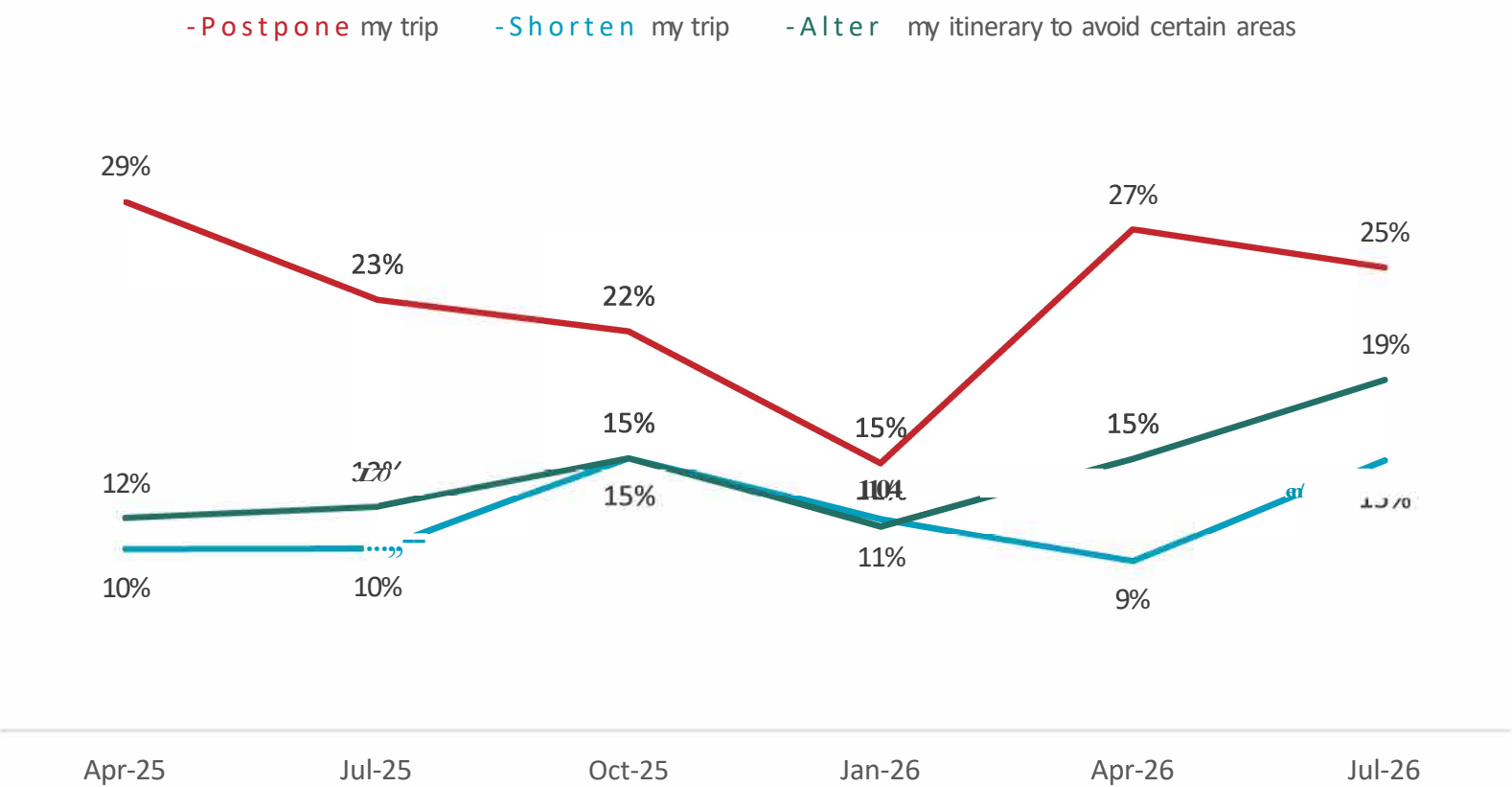


- **Europe and Mexico** were the most frequently mentioned alternative international destinations to the U.S.
- **The Caribbean and Japan** were also commonly mentioned as alternatives.

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.

Avoidance of Certain U.S. Areas Reaches 19% Among Policy-Concerned Travelers

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?



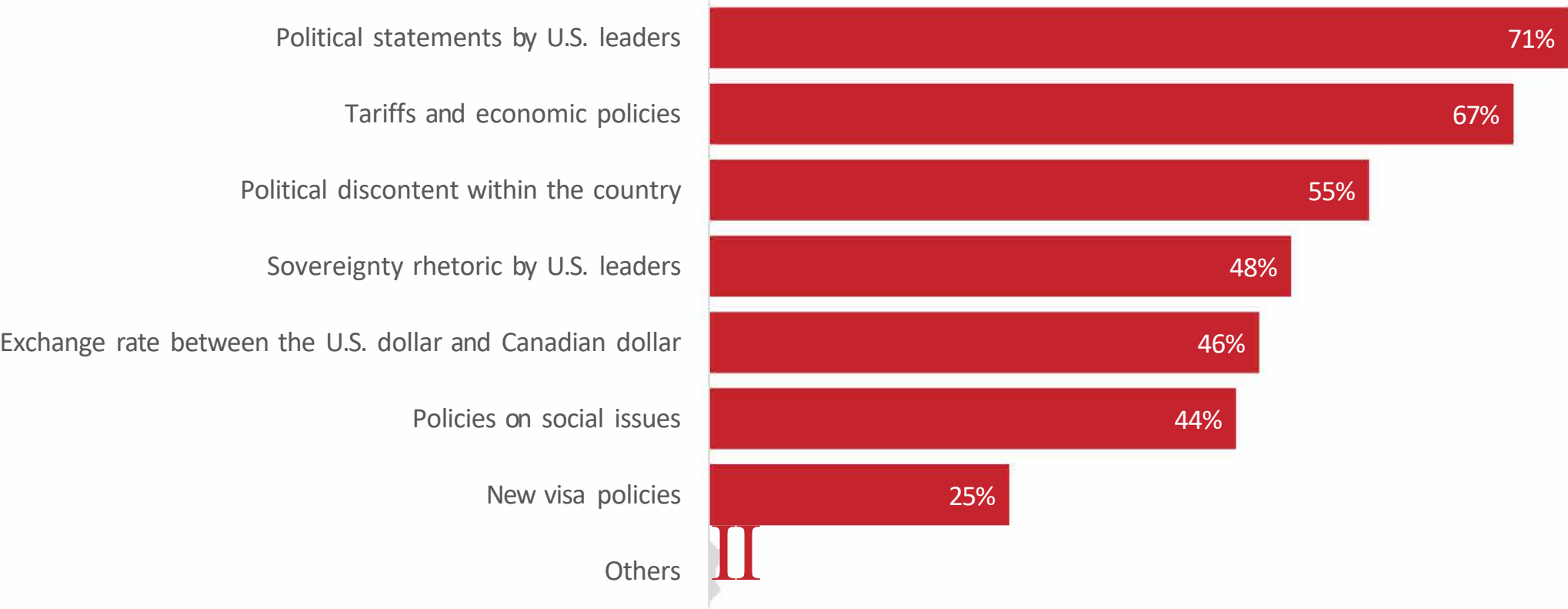
Among policy-concerned travelers, **avoidance of certain U.S. areas continued to increase to 19% from 11% in January 2026, an 8.0-point increase.**

King £9,2

Canadian Travel Sentiment Study July 2026 vs previous waves / Percentages are based only on respondents who are confirmed travelers and indicated U.S. policies and politics are influencing their travel plans

U.S. Politics and Tariffs Shape Canadian Travel Plans

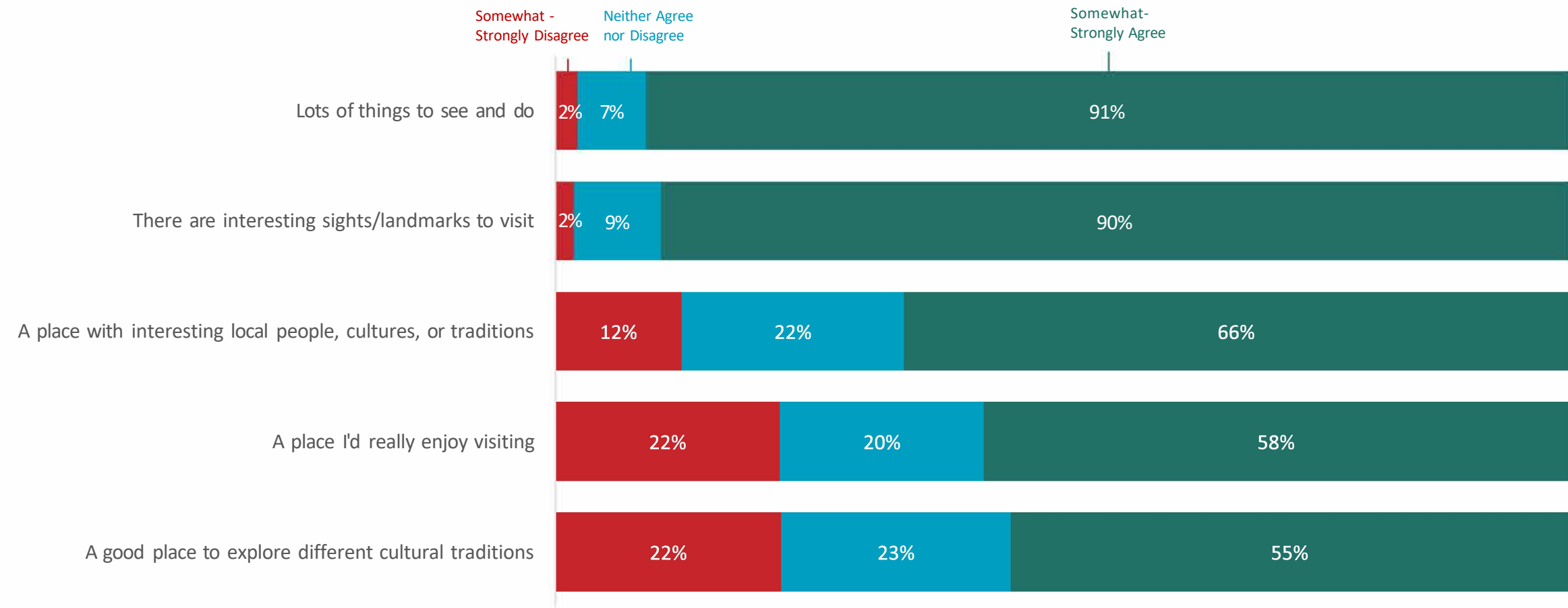
You indicated that you will change your travel plans to the U.S. in the next 12 months. Which of the following U.S. government policies, trade practices, and/or political statements caused you to change your travel plans?



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

U.S. Widely Perceived by Canadian Travelers as a Place with Lots to See and Do

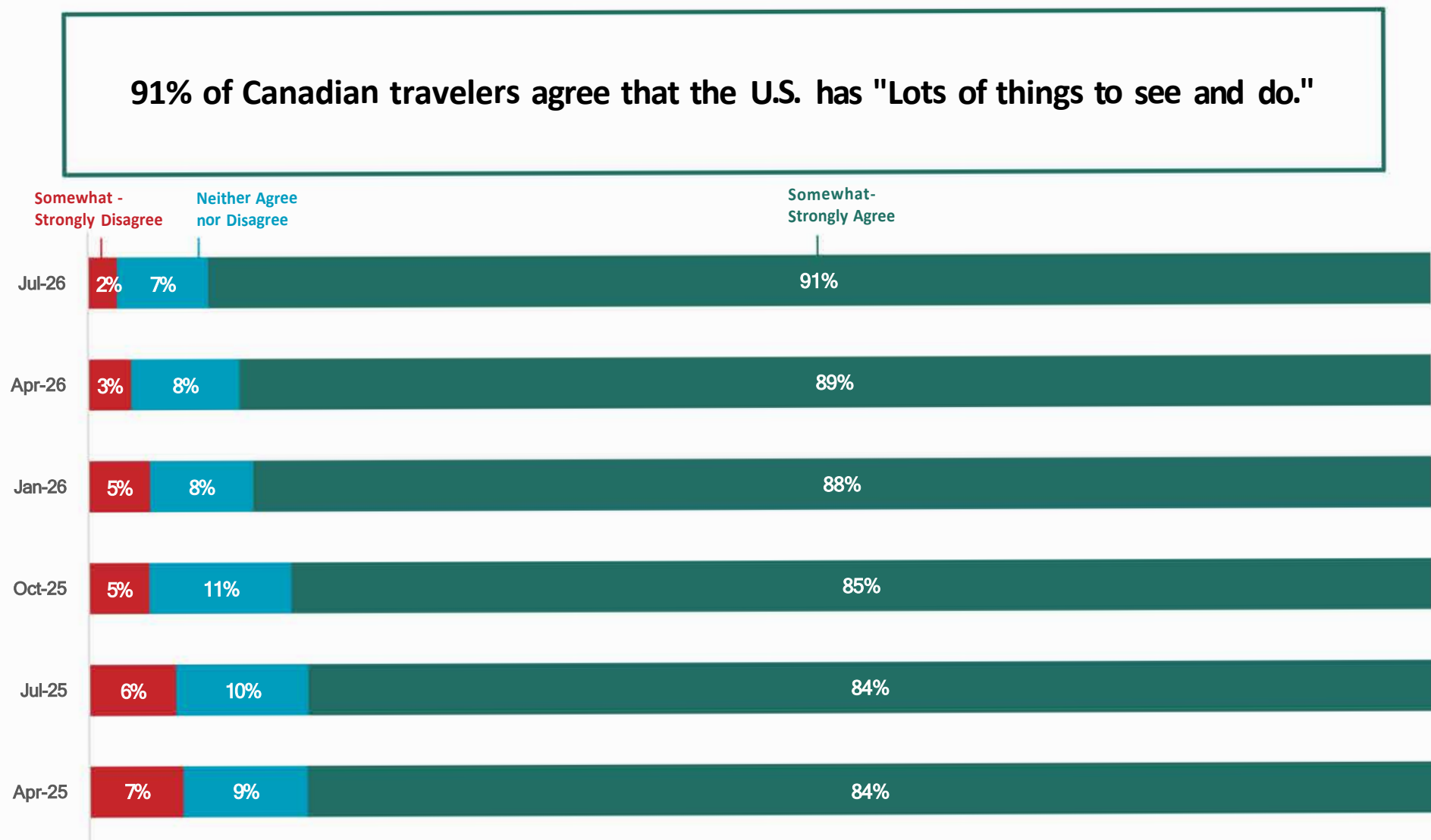
Please provide your personal impressions of the United States as an international tourism destination.



King £9,2

Canadian Travel Sentiment Study July 2026 / Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

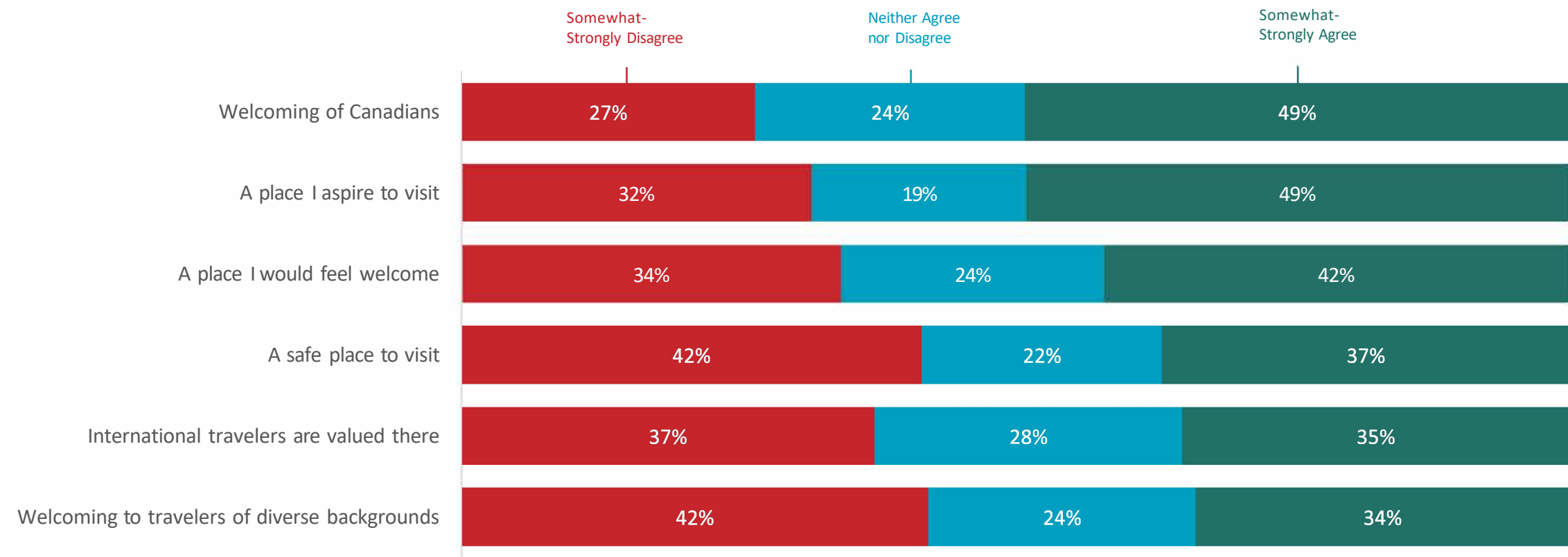
Recognition of U.S. Attractions Peaks at 91%, Highest in the Study Period



Canadian Travel Sentiment Study July 2026 vs previous waves / Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Perceptions of U.S. as Welcoming, Safe, and Valuing International Travelers Remain Low

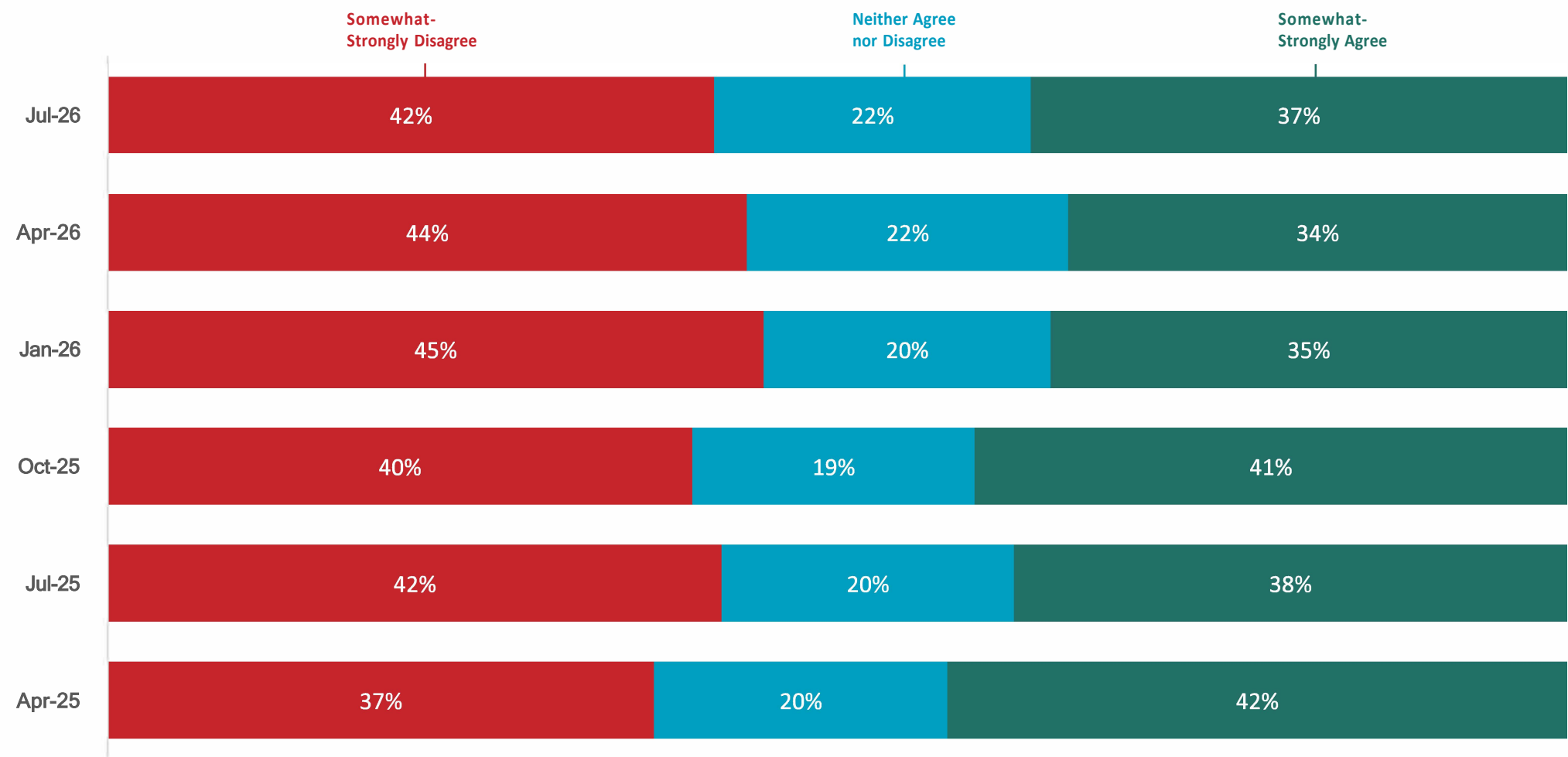
Please provide your personal impressions of the United States as an international tourism destination.



Canadian Travel Sentiment Study July 2026 / Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

Canadian Travelers' Confidence in U.S. Safety

Please provide your personal impressions of the United States as "A Safe Place to Visit"



Canadian Travel Sentiment Study July 2026 vs previous waves / Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)



Canadian Travel Sentiment Study

Methodology

Key Details:

- Survey Date: July 9-14, 2026
- 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

Miles Partnership Research and Insights
www.MilesPartnership.com/How-We-Think

This study is supported by Miles Partnership.

Thank You!