



THE ROAD AHEAD

Canadian Travel Sentiment Study

WAVE 2

AUGUST 12, 2025

Longwoods
INTERNATIONAL

Key Highlights

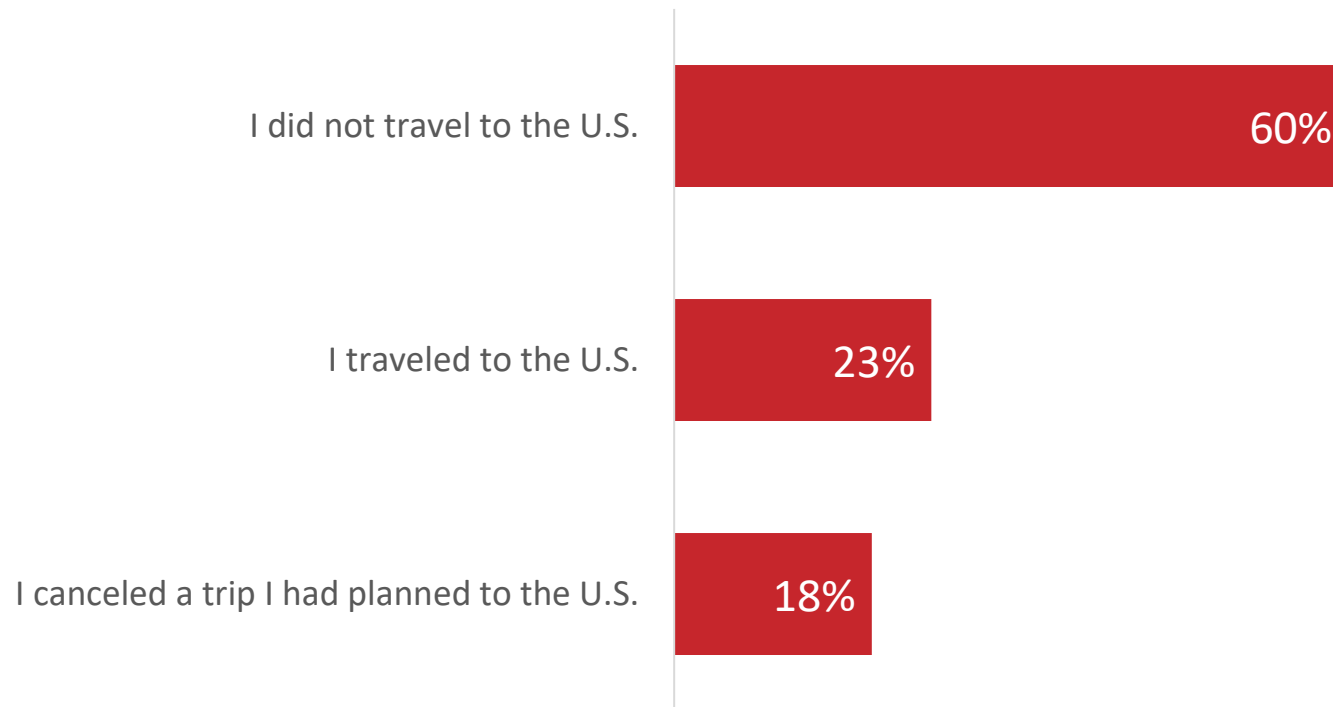


Canadian Travel Sentiment Study July 2025

- **Recent Travel Patterns:** Within the past six months, 18% of Canadian travelers canceled a previously planned visit. Looking ahead, nearly one in five Canadian travelers (17%) indicated they intended to travel to the U.S. in the next 12 months, but recently canceled their plans, significantly less than April 2025 (36%)
- **Policy-Driven Avoidance:** A strong majority (63%) say U.S. policies make them less likely to visit. Leading deterrents include concerns about tariffs and economic policies (80%), as well as political statements by U.S. leaders (71%) that contribute to a less welcoming environment and greater uncertainty around cross-border travel.
- **Domestic Substitution Pattern:** When changing U.S. plans, Canadians are choosing domestic alternatives (42%) over international alternatives to the U.S. (30%).
- **Alternative Destination Preferences:** Europe was the most frequently mentioned alternative, followed by Mexico and the Caribbean.
- **Escalating Political Influence:** The impact of political factors on travel decisions increased from April to July. Political statements by U.S. leaders became more influential (+7.4 points), as did overall political discontent within the U.S. (+4.0 points), and sovereignty rhetoric by U.S. leaders (+4.5 points), showing that high-profile political dynamics are increasingly discouraging Canadian visits.
- **Perception Gap:** While 84% of Canadians acknowledge the U.S. offers abundant attractions, only 36% perceive it as welcoming to travelers of diverse backgrounds and 43% feel welcomed as Canadians, revealing a substantial gap between destination appeal and hospitality perceptions.

Within the Last Six Months, 18% of Canadian Travelers Canceled a Trip to the U.S.

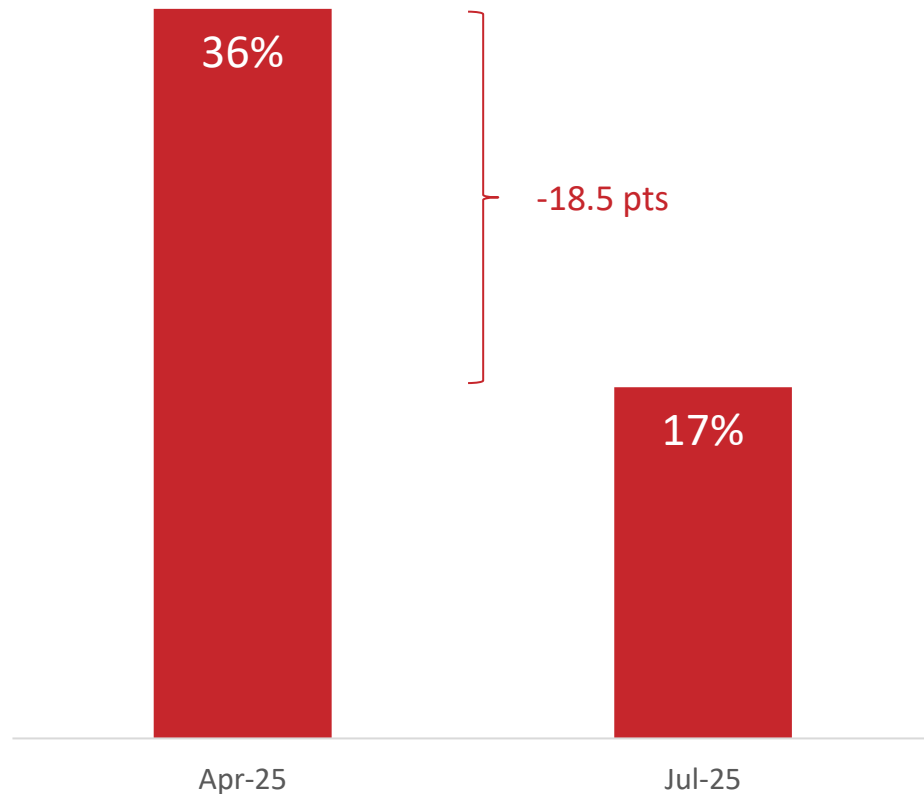
Within the last 6 months:



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Wave-Over-Wave Comparison: Fewer Cancellations (July 2025 vs April 2025)

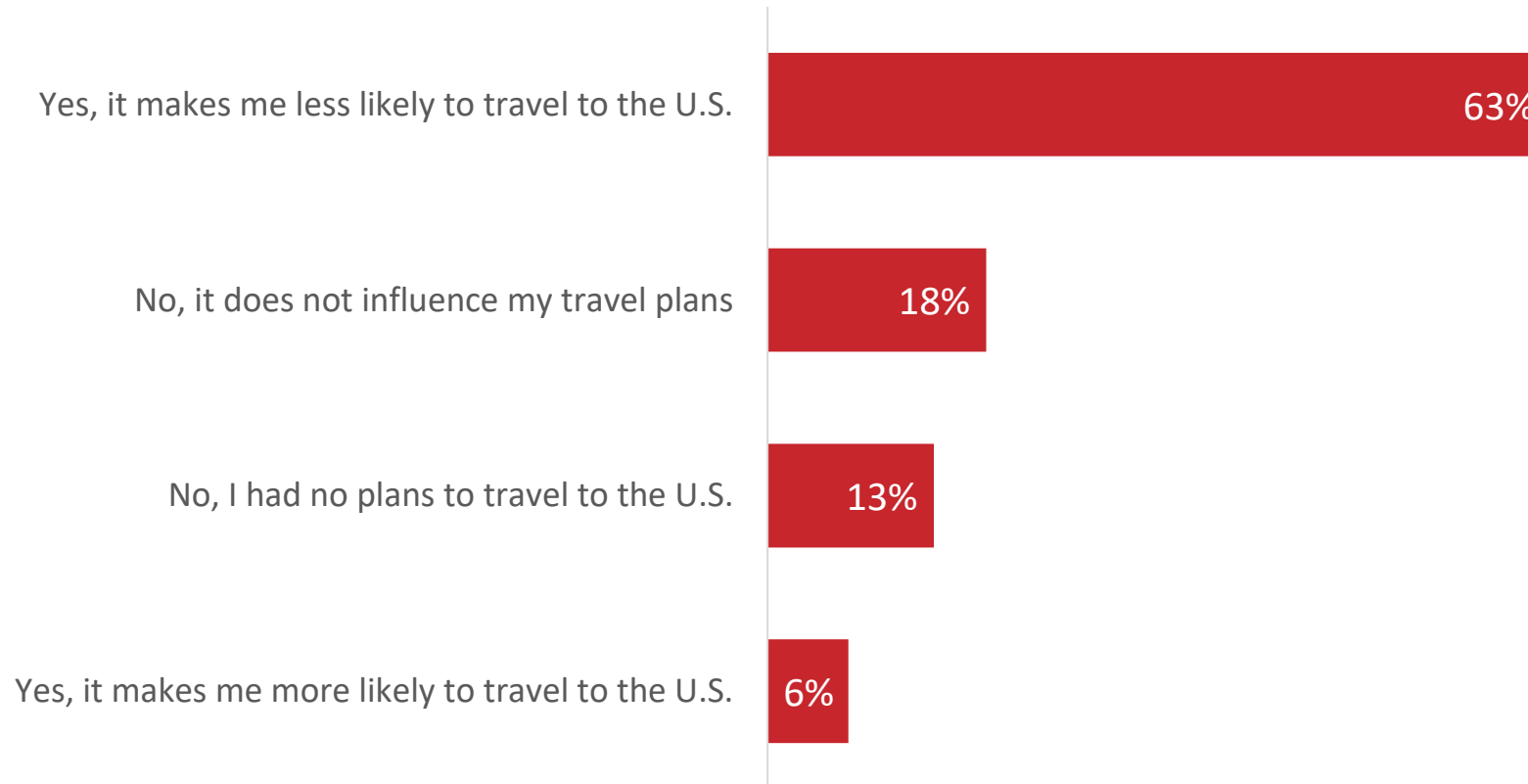
In the next 12 months, do you intend to travel to the U.S.?
I intended to travel to the U.S., but I recently canceled my plans



Nearly one in five Canadian travelers (17%) indicated they intended to travel to the U.S. in the next 12 months but recently canceled their plans – **significantly less than April 2025 (36%).**

Policy and Politics Discourage Canadian Travelers

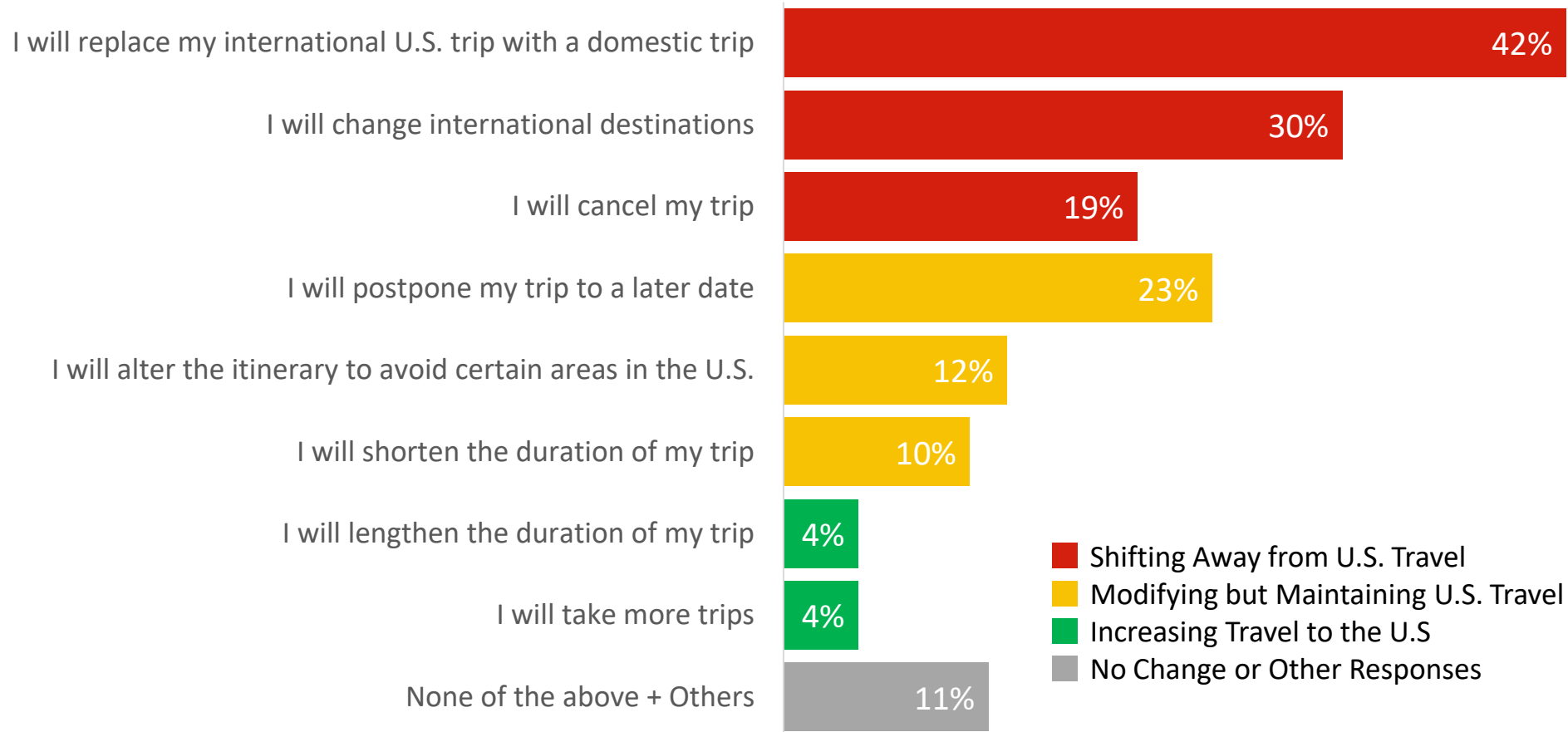
Are current U.S. Government policies, trade practices, and/or political statements influencing you to change your travel plans to the U.S. in the next 12 months?



63% of Canadian travelers responded that they are **less likely to visit the U.S.** due to policy and politics

Canadian Travel Adaptations: Domestic Substitution Dominates

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%.

Alternative International Destinations: Europe, Mexico and Caribbean Most Mentioned

You indicated you will change international destinations. Please specify where you are traveling instead.

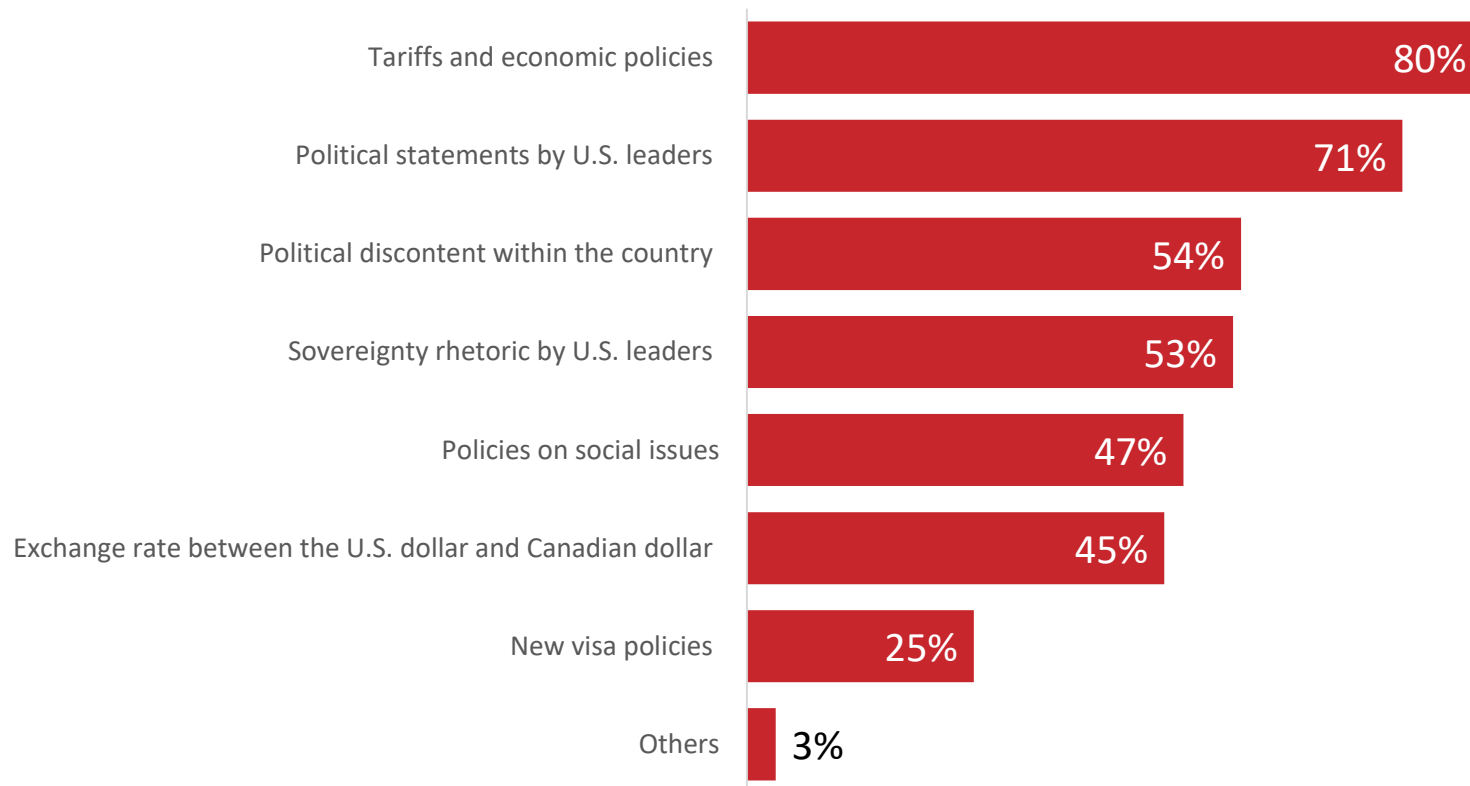


- **Europe was the most frequently mentioned** alternative destination, with both the region and specific countries highly represented.
- **Mexico and the Caribbean** were also commonly named as alternatives to U.S. travel.

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.

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?



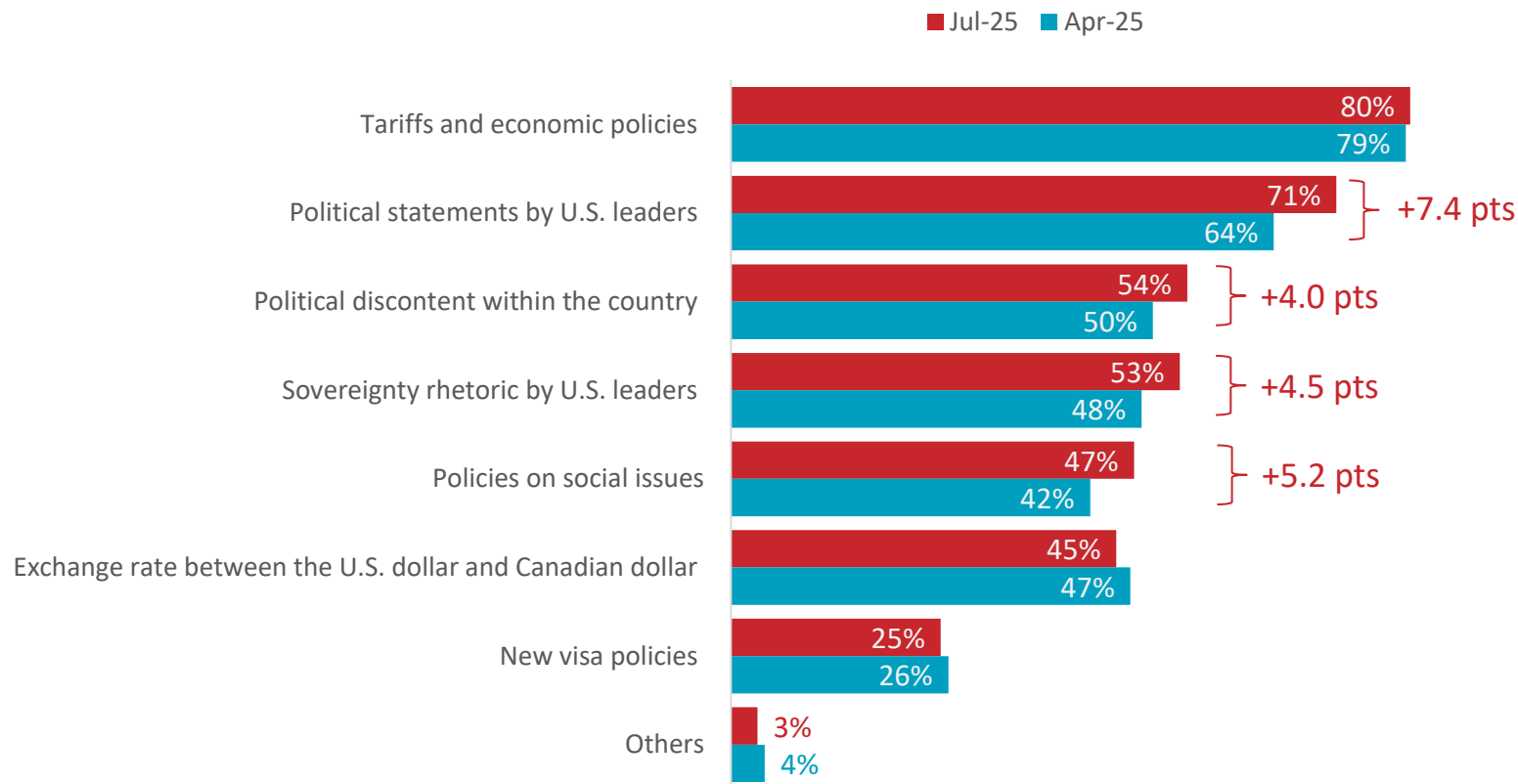
Tariffs and economic policies (80%) and political statements by U.S. leaders (71%) are the most common factors prompting Canadian travelers to reconsider their travel plans to the U.S.

Political discontent within the U.S. (54%) and sovereignty rhetoric by U.S. leaders (53%) both play a major role, indicating that travelers are responding to broader political climate issues.

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

Escalating Policy Concerns: Growing Impact on Travel Decisions

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?

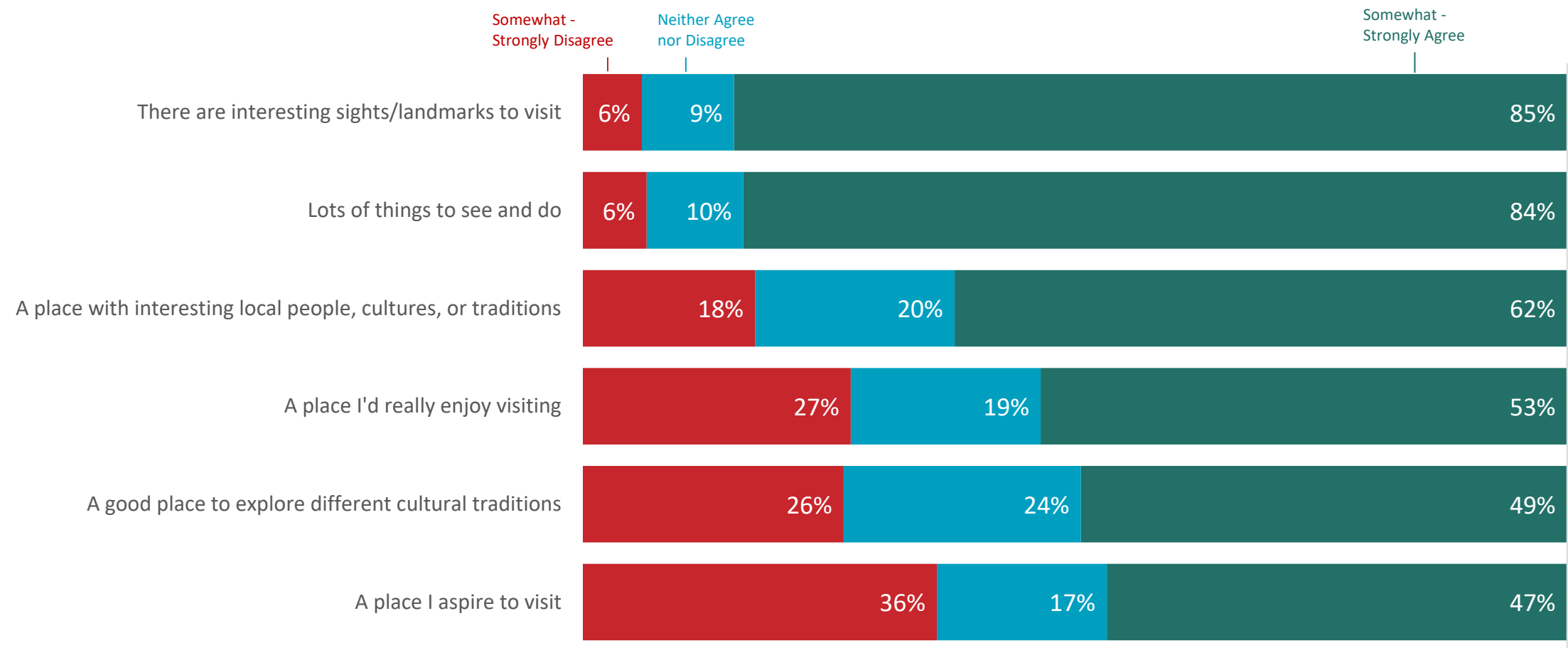


Between April and July 2025, the influence of U.S. political factors intensified significantly: **political statements by leaders, political discontent, sovereignty rhetoric, and policies on social issues** all increased, showing deteriorating Canadian traveler sentiment toward U.S. travel.

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

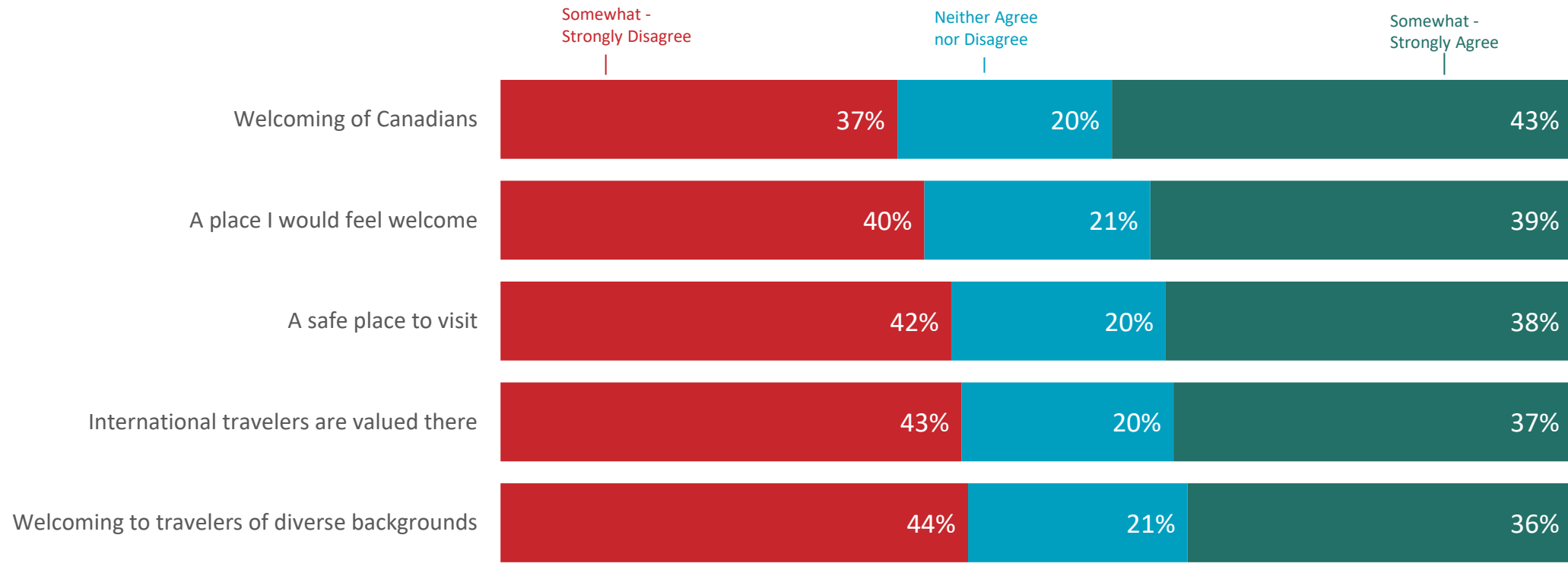
Strong U.S. Tourism Attraction Appeal Persists

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



Low Welcoming Perceptions Despite Attraction Appeal

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





Canadian Travel Sentiment Study

Methodology

Key Details:

- Survey Date: July 10-13, 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

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

This study is supported by Miles Partnership.

Thank You!