



THE ROAD AHEAD

Canadian Travel Sentiment Study

WAVE 1

APRIL 29, 2025

Longwoods
INTERNATIONAL

Key Highlights

Strong Travel Intent Among Canadians

- **4 in 5 Canadians (79%)** have travel plans in the next 6 months.
- **39%** either plan to visit the U.S. or have already booked their trip.

U.S. Travel Plans Being Reevaluated

- **60%** of Canadians say U.S. policies and politics make them less likely to visit.
- **36%** had planned a U.S. trip but have since cancelled.
- **29%** have chosen to postpone their upcoming trip to the U.S.

Canadians Choosing Alternatives to U.S. Travel

- **40%** are replacing a U.S. trip with a domestic getaway.
- **27%** are choosing **different international destinations instead, with Europe and Mexico** as the top alternatives.

Policies and Politics Driving the Shift

- **Tariffs (79%) and Political statements made by U.S. leaders (64%)** are the leading reasons behind reduced interest in U.S. travel.

Perceptions of Welcomeness Remain Low

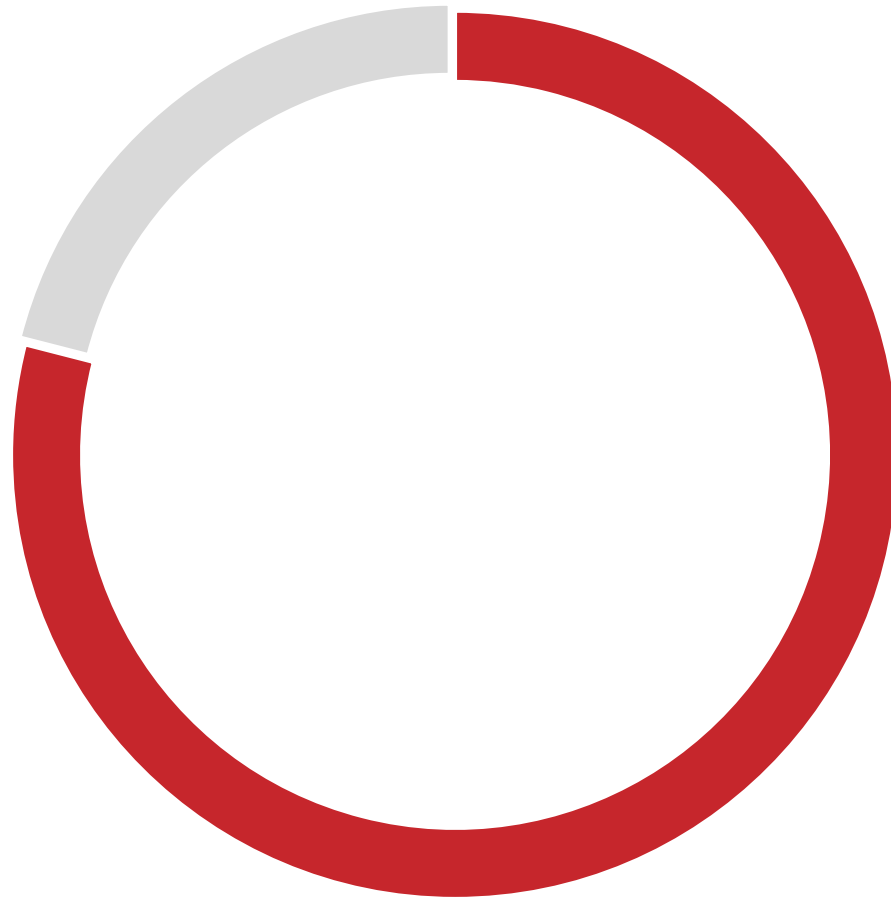
- Just **42%** of Canadians strongly feel the U.S. is welcoming to them personally, highlighting a significant perception gap.

U.S. Retains a Strong Place in Canadian's Travel Perceptions

- Canadian travelers continue to see the U.S. as a diverse and attractive international destination, with more than 80% saying that the destination has 'lots of things to see and do' and 57% indicating it's "a place I'd really enjoy visiting".



4 In 5 Canadians Have Travel Plans



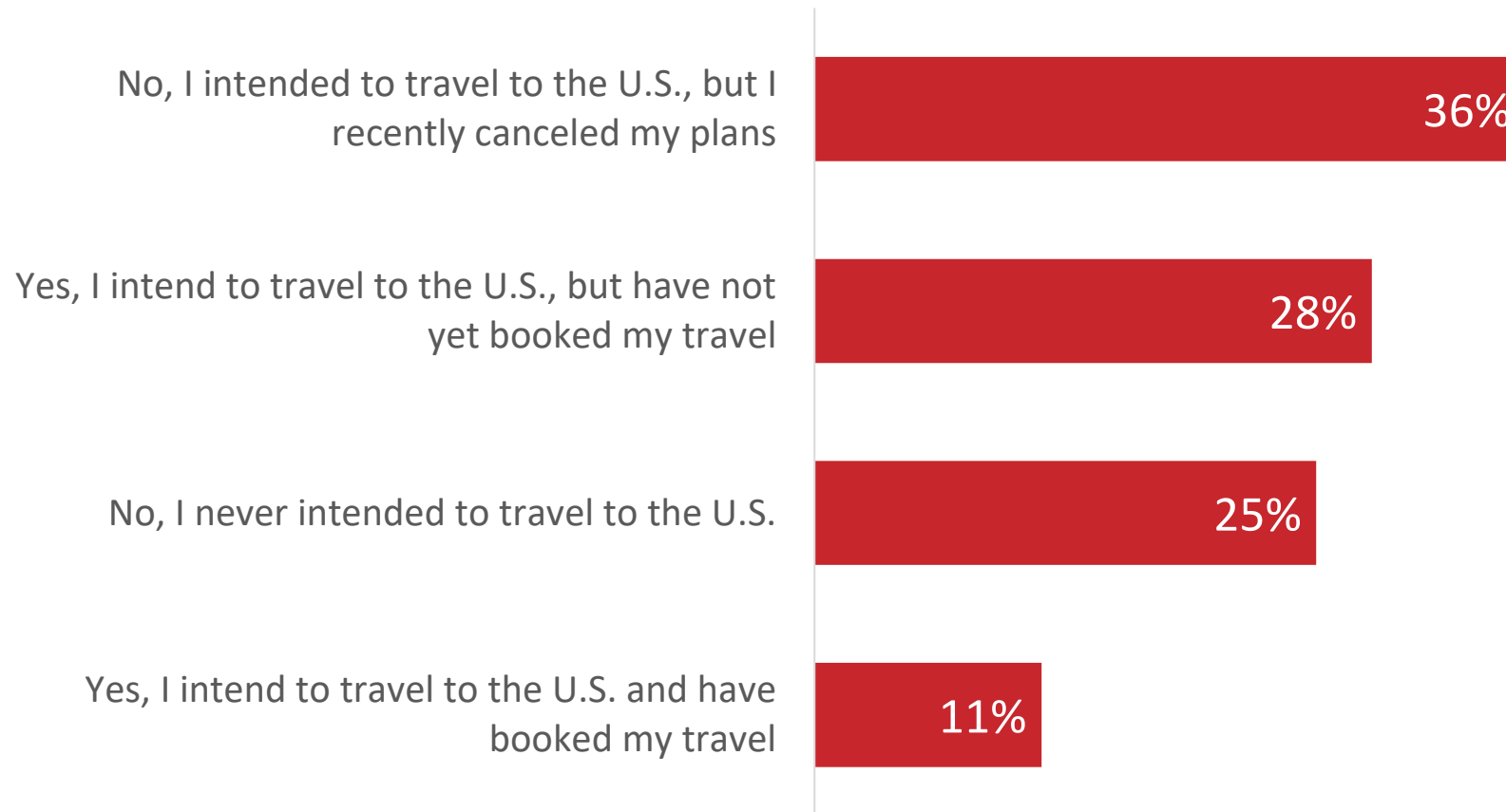
■ Have Travel Plans ■ No Travel Plans

79%

of Canadians have travel plans in the next 6 months

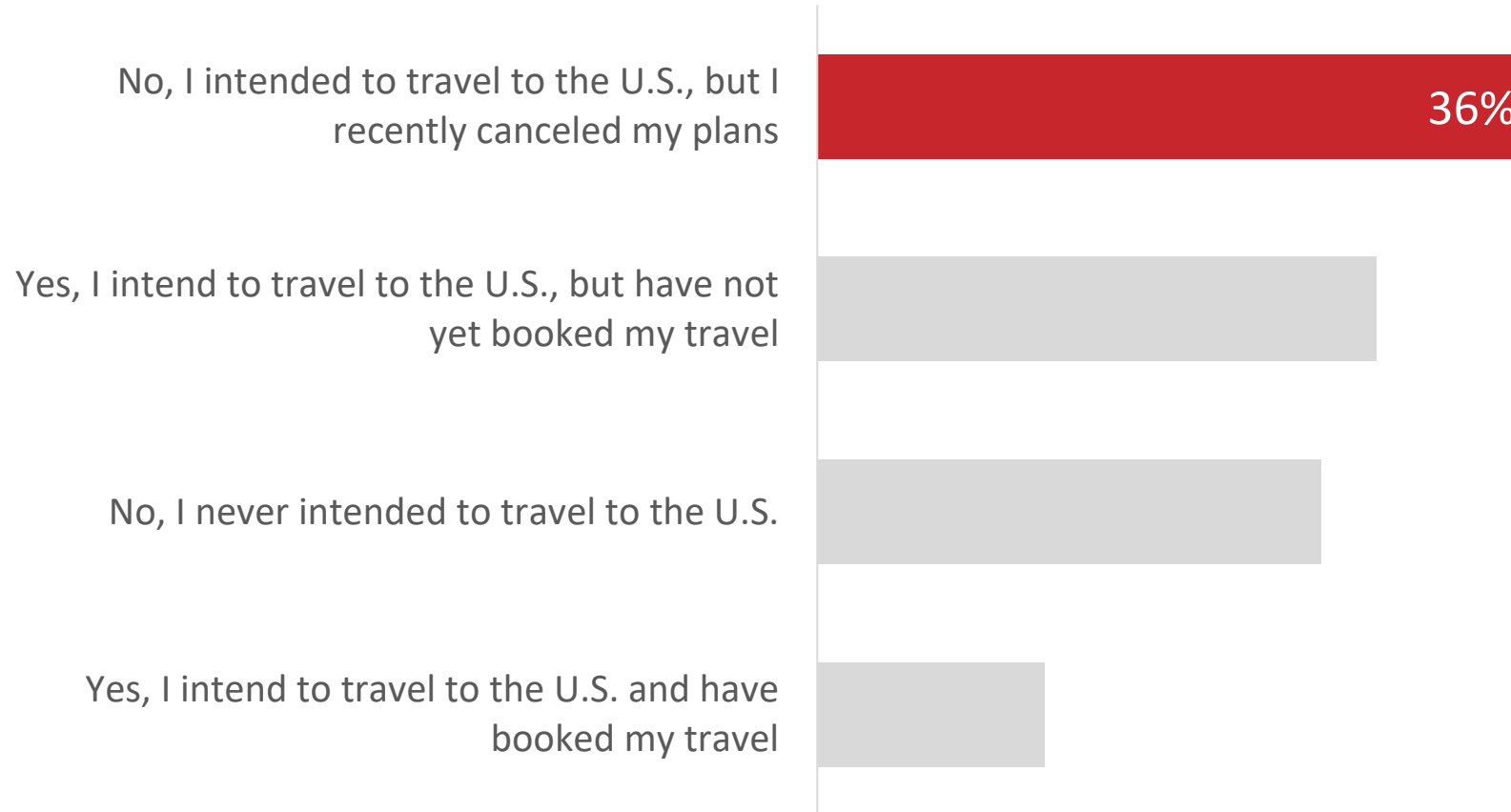
Intent to Travel to the U.S.

In the next 12 months, do you intend to travel to the United States?



No Interest in U.S. Travel

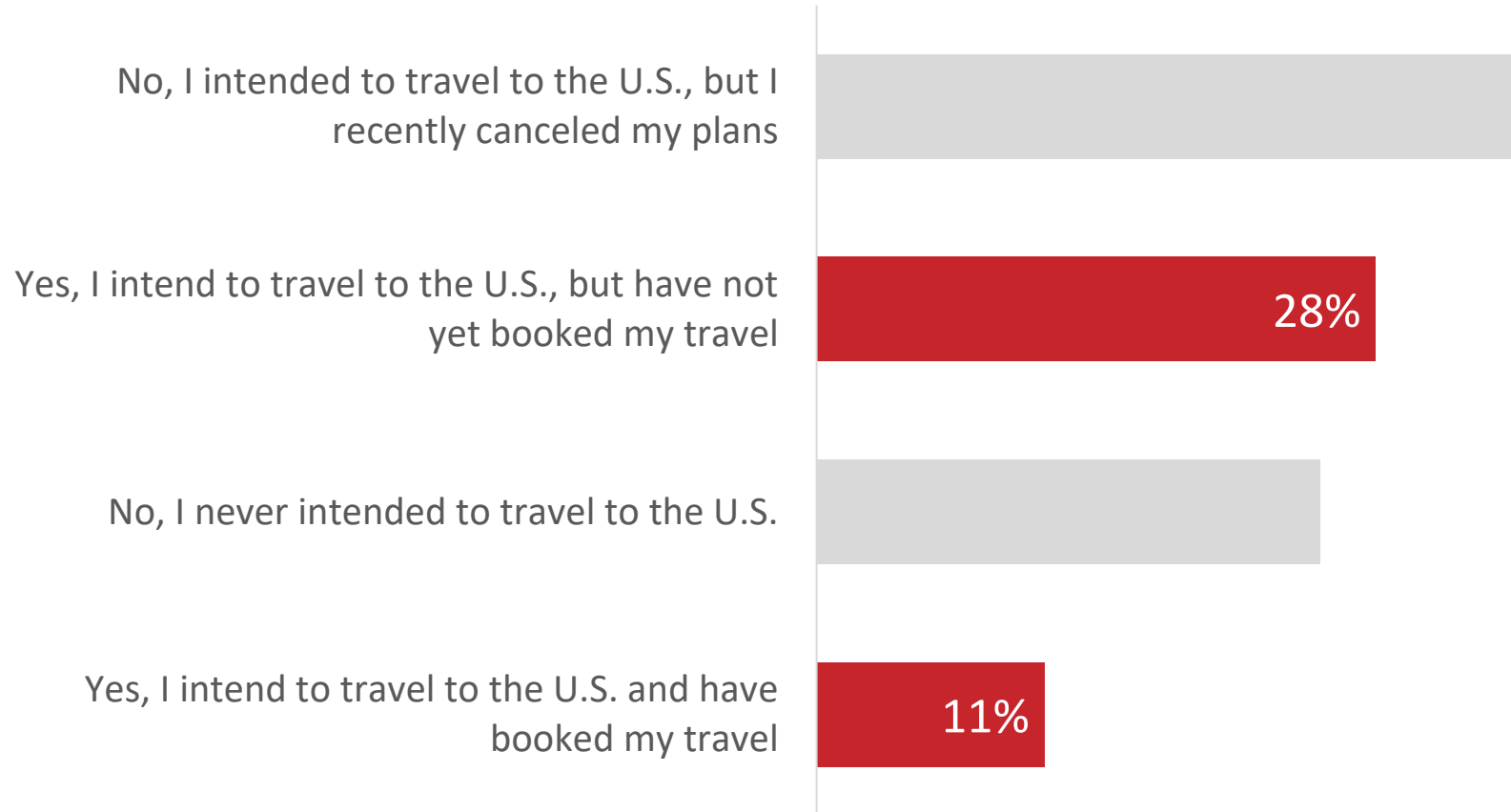
In the next 12 months, do you intend to travel to the United States?



36% of Canadians had plans to visit the U.S. but chose to cancel

Canadians Planning U.S. Travel

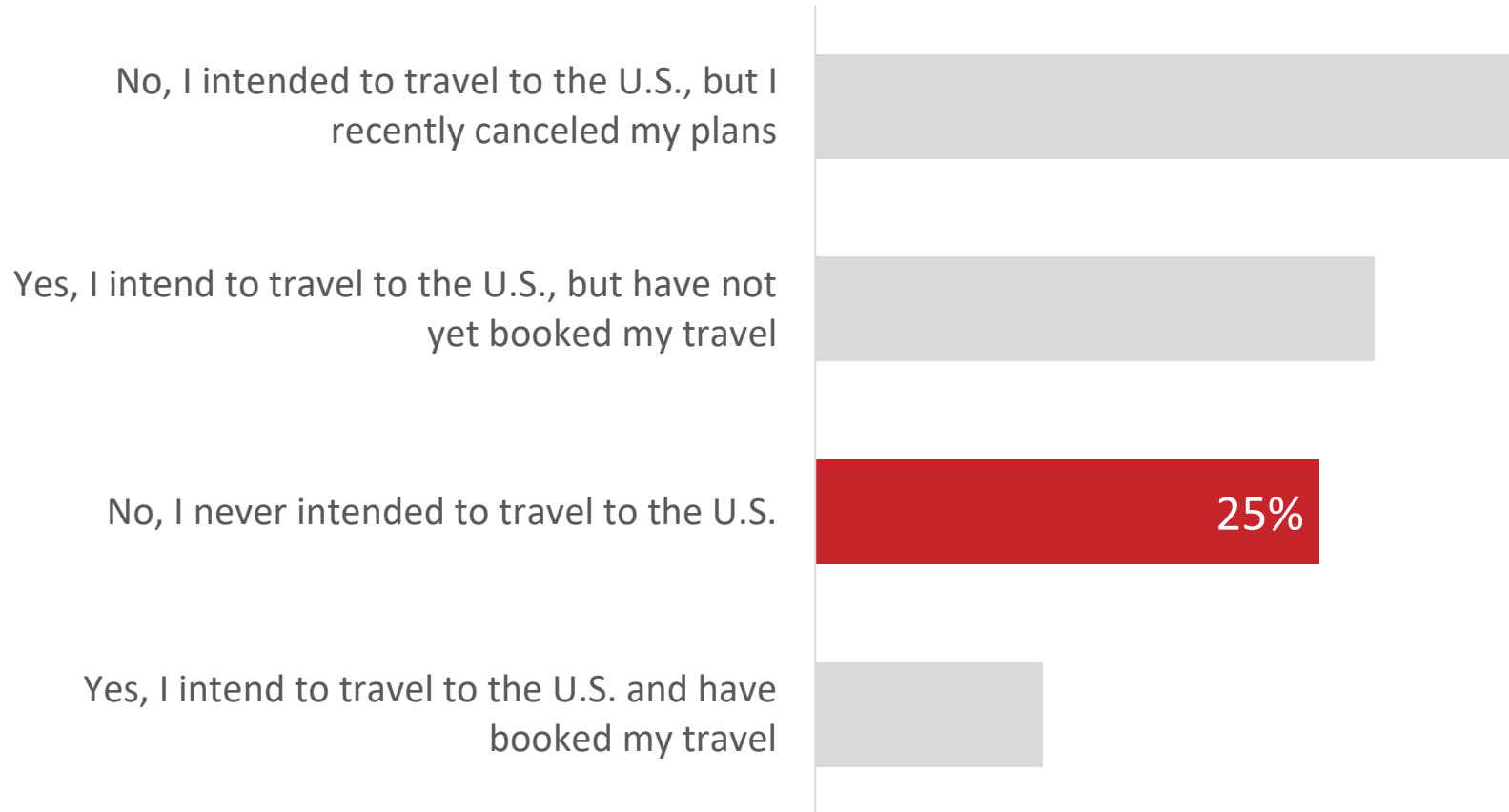
In the next 12 months, do you intend to travel to the United States?



39% of Canadians either plan to visit the U.S. or have already booked their trip, signaling strong travel intent and an opportunity for targeted engagement.

Canceled U.S. Travel Plans

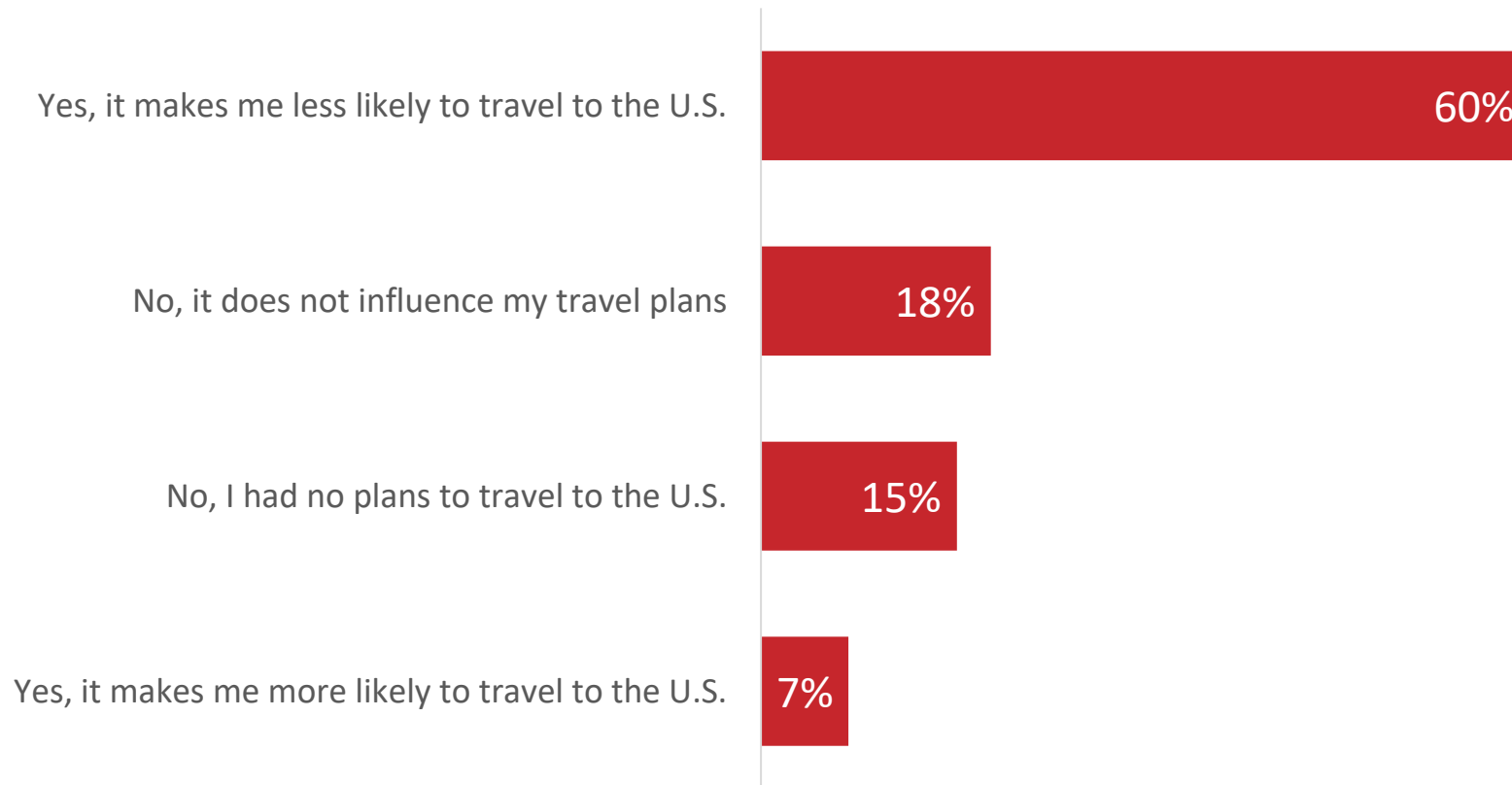
In the next 12 months, do you intend to travel to the United States?



A quarter of Canadians surveyed have no plans or interest in traveling to the U.S. in the next year

Policy & Politics Discourage Canadian Visitors

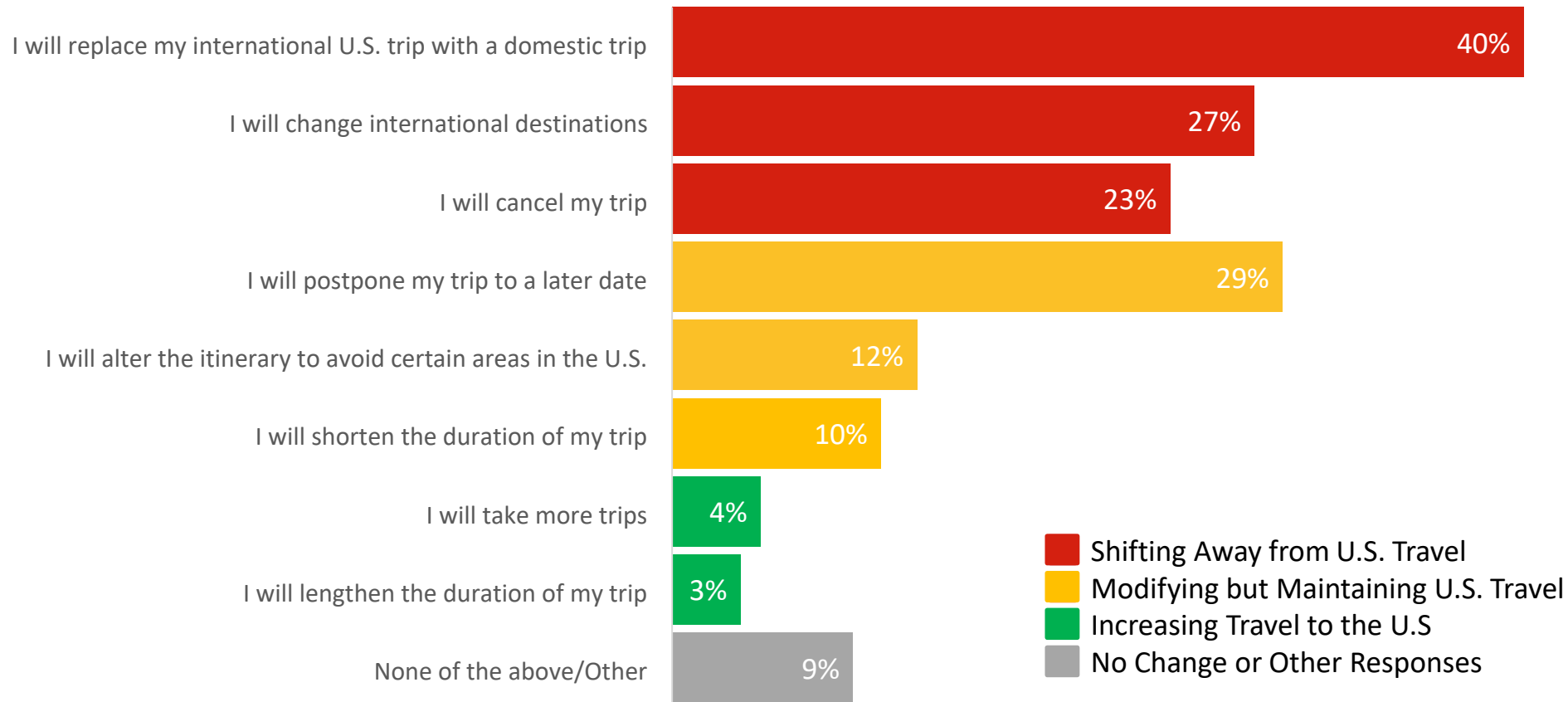
Are current U.S. Government policies, trade practices, and/or political statements influencing you to change your travel plans to the U.S. in the next 12 months?



60% of Canadians responded that they are **less likely to visit U.S.** due to policy & politics

How Canadians Are Adjusting Their U.S. Travel Plans

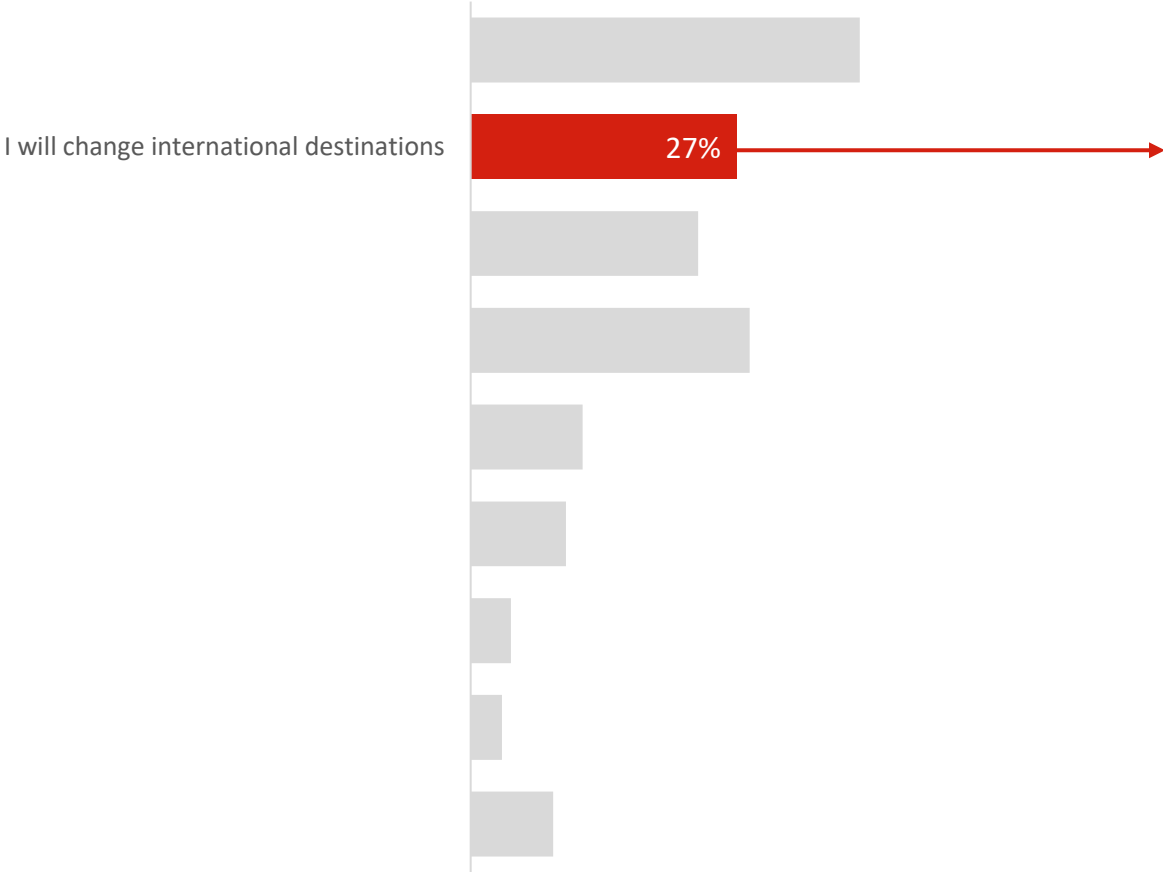
You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



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

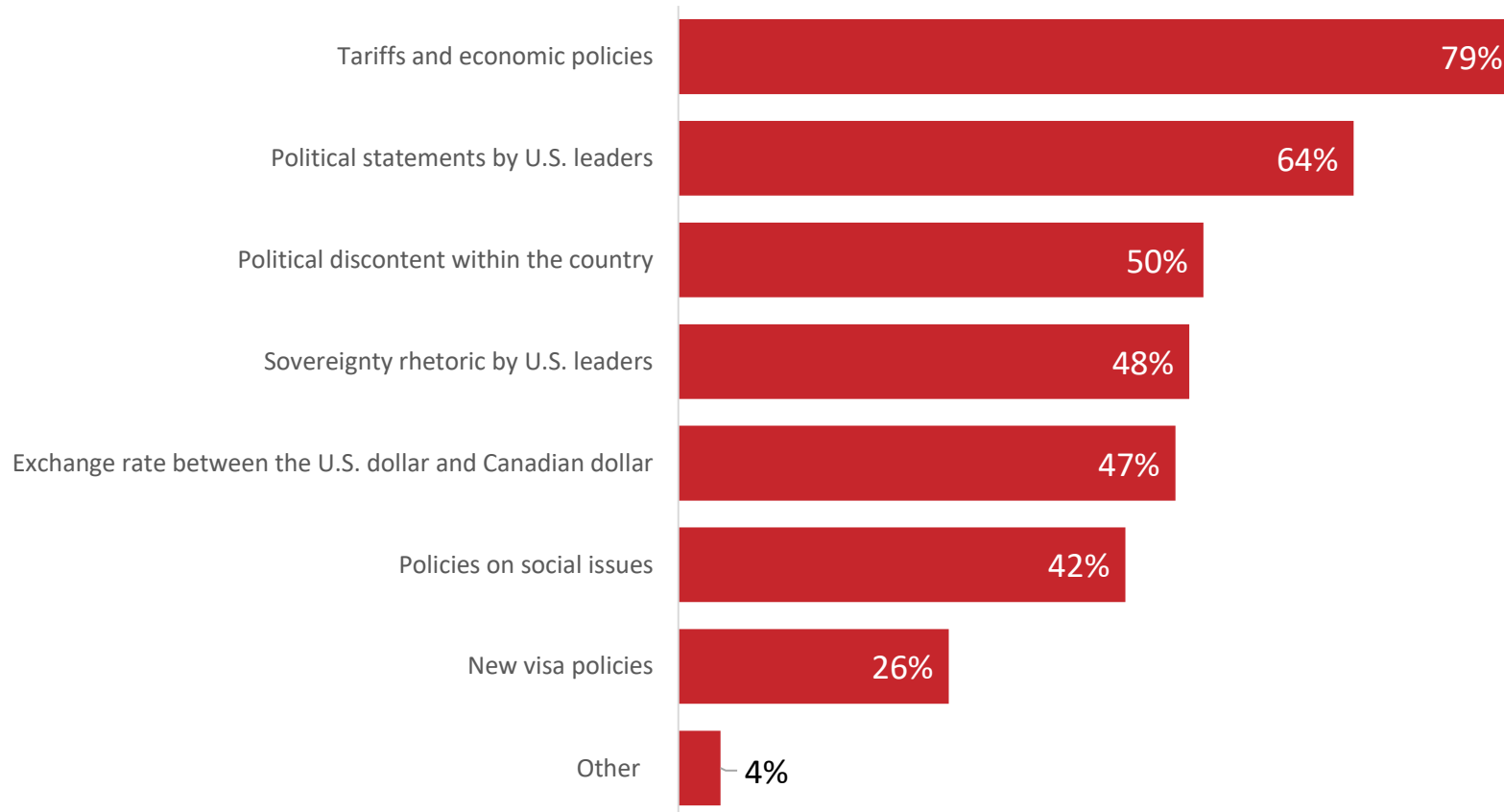
Canadians Eye Europe and Mexico Over U.S.

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



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?



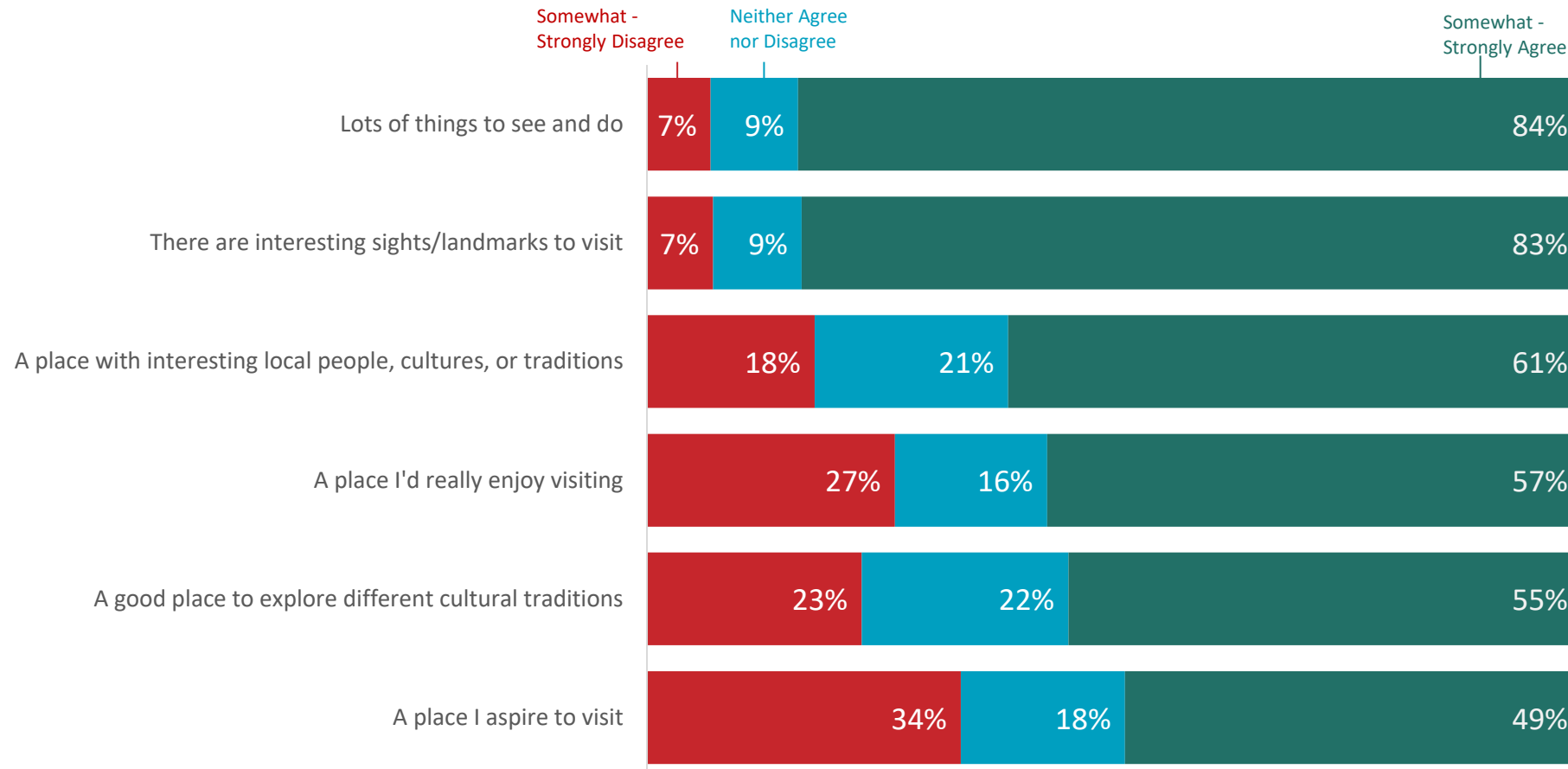
Note: Respondents could select multiple options; therefore, percentages may not sum up to 100%.

Tariffs (79%) and Political statements by U.S. leaders (64%) are the top reasons Canadians are reconsidering travel to the U.S.

Additionally, the exchange rate between the U.S. dollar and Canadian dollar (47%) remains a key factor.

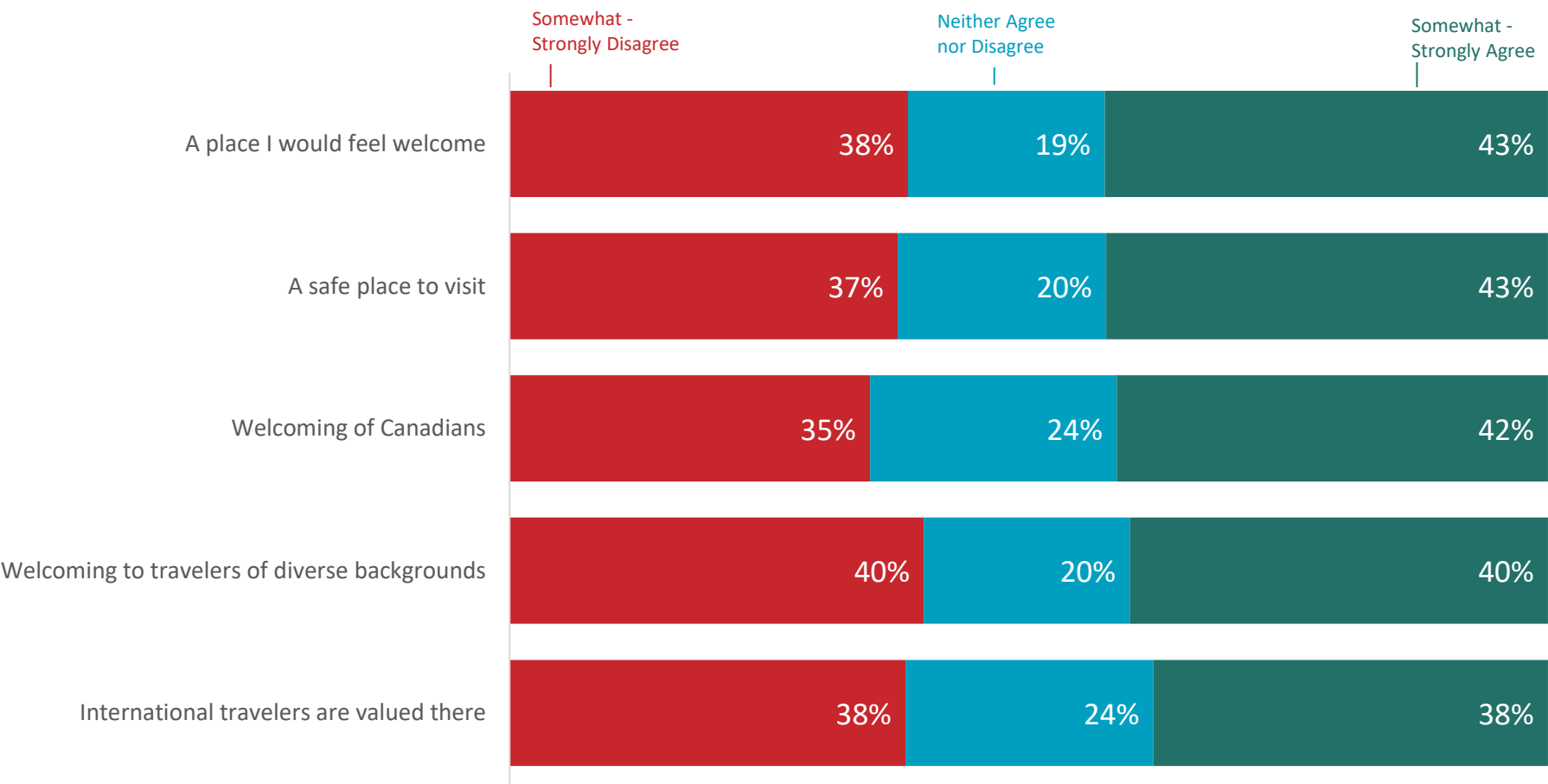
Canadians See the U.S. as a Diverse Tourist Destination

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



But Perception of the U.S. as a Welcoming Destination Remains Low

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



Canadian Travel Sentiment Study April 2025
Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)



Canadian Travel Sentiment Study

Methodology

Key Details:

- Survey Date: April 10-11, 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!