



Report

Canadian and U.S. Travel Behaviour

October 2, 2025

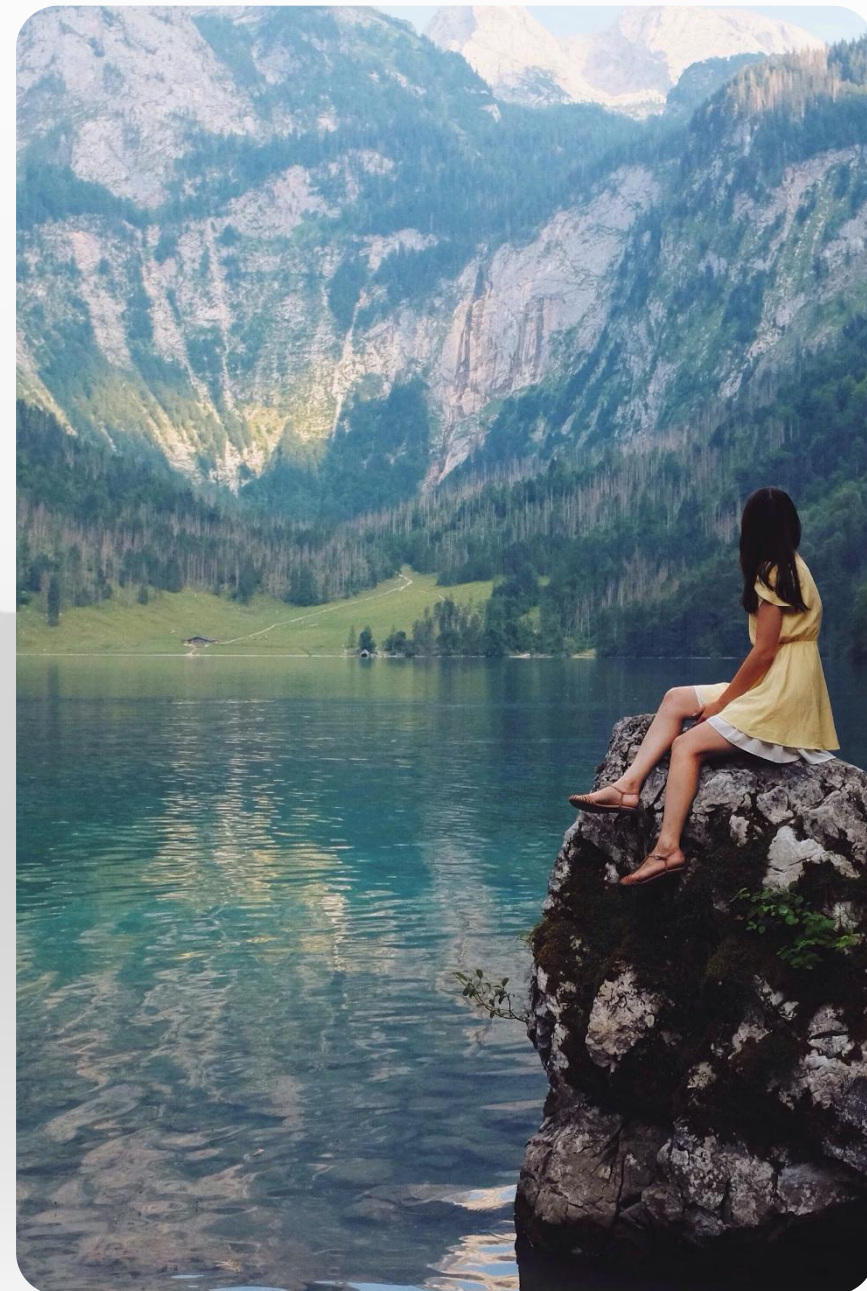
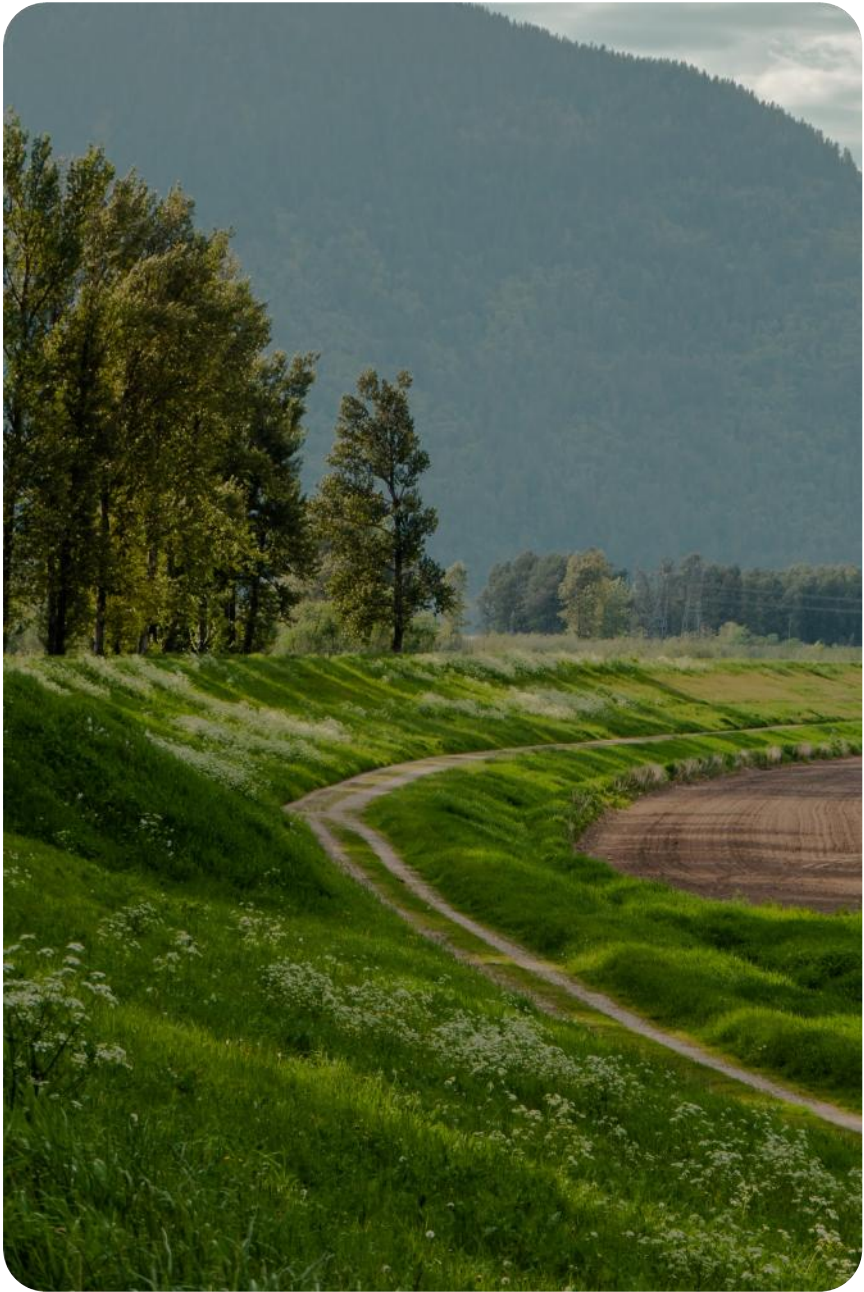


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Methodology



Methodology

Online survey with Canadian and American residents aged 18 years and older.

- **Canada:**
 - Summer 2025: n= 1,537
 - Fall 2025: n= 1,621
- **United States:**
 - Fall 2025: n=1,015

Respondents were randomly recruited using LEO's online panel.



When

Summer 2025: May 16-19, 2025

Fall 2025: August 29-31, 2025



Margin of Error

A margin of error cannot be associated with a non-probability sample in a panel survey.

However, a probability sample of comparable size would yield the following margins of error:

- **Canada:** A sample of 1,621 respondents yields a margin of error of $\pm 2.43\%$ (19 times out of 20)
- **United States:** A sample of 1,015 respondents yields a margin of error of $\pm 3.09\%$ (19 times out of 20).



Weighting

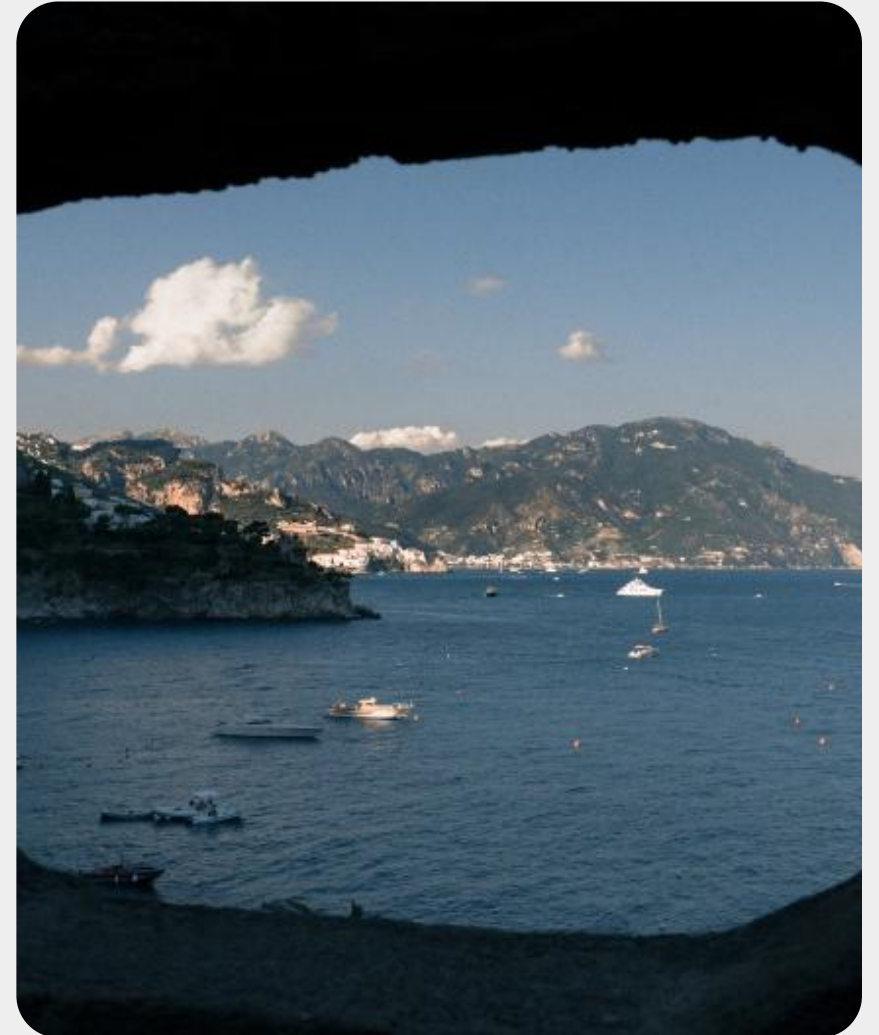
Results were weighted by age, gender, and region to ensure the data is representative of the Canadian and U.S. populations, using the most recent census data from Statistics Canada and the U.S. Census Bureau.

Leger's Travel and Tourism Team

Specialized Expertise	Dedicated team of 12 researchers who specialize in travel and tourism research.
Industry Thought Leadership	Regularly published insights through content pieces and press releases.
Extensive Experience	Proven track record with hundreds of travel and tourism projects.
Diverse Clientele	Trusted by destination organizations, airports, airlines, attractions, tourism associations, and hotels.
Comprehensive Research Solutions	Full-service qualitative and quantitative research.



Key Findings & Implications



Key Findings: **Canadians** are embracing “support local” travel, while U.S. destinations continue to face resistance, a trend unlikely to ease in the months ahead.

Planned summer travel closely aligns with intended plans.



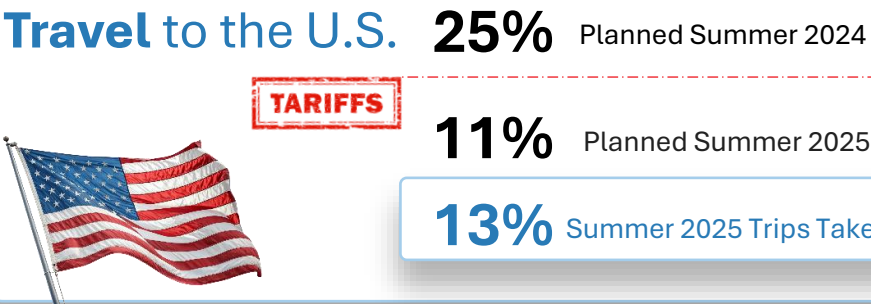
Most Canadians stayed close to home this summer.

Most Canadians stayed close to home, with over half travelling within their own province – well above the 37% who had originally planned to do so.

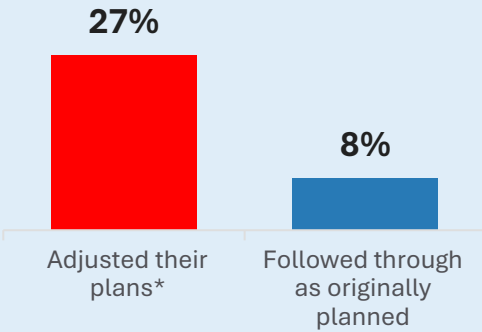


Canadians continue to turn their backs on U.S. Travel due to Trump/Tariffs

Conforming to their intentions, Canadians continue to limit their travel to the U.S.

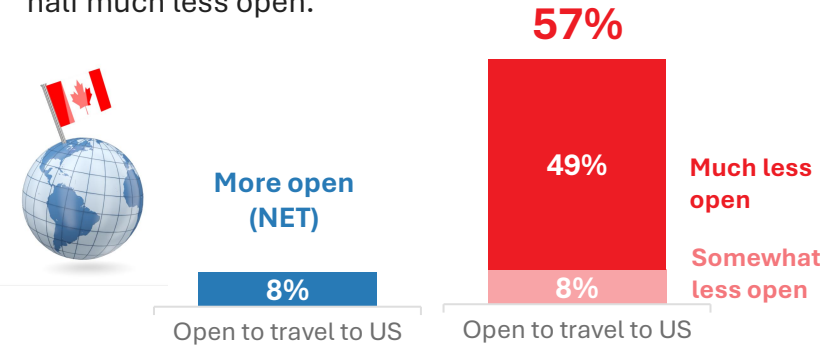


The political climate affected summer travel plans to the U.S.



Canadians continue to remain steadfast in their avoidance of U.S. travel.

Nearly three in five Canadians say they are less open to travelling to the U.S. in the next six months, with almost half much less open.



*postponing, cancelling, or choosing alternative destinations

↑ Statistically significantly higher than previous wave
↓ Statistically significantly lower than previous wave

Key Findings *Continued*

Americans' summer travel remained mostly domestic, with Canada attracting little interest and tariffs showing minimal influence on their choices.

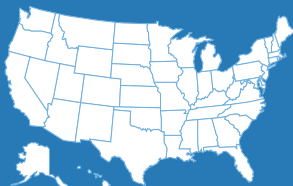
This summer, Americans largely stayed within their own borders.



38%
Travelled this summer



89%
Within the U.S



39%
In their home state

Canada remains a niche choice for American summer travellers.



Travelled to Canada



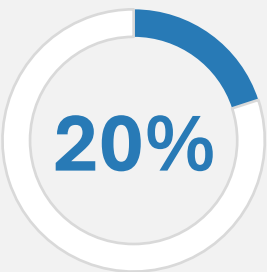
But Canada still holds potential

Not considered Canada before, but more open to considering it 12%

Considered Canada before, and consideration level has not changed 23%

Considered Canada before, but less likely to consider it now 7%

Unlike Canadians, Americans' travel decisions are far less influenced by politics or the U.S.–Canada tensions.



Travel plans affected in the past year



When Americans changed their travel plans, their choices were driven primarily by practical concerns.



45%

Cost of travel



35%

Personal reasons/scheduling conflicts



23%

Weather concerns



13%

Political climate



8%

US/Canada trade tariffs

Recommendations for Canadian Tourism Operators

1

Focus on Close-to-Home Travel Experiences

With Canadians prioritizing travel within their own province, tourism organizations can **design shorter, bundled experiences** – from weekend stays and cultural tours to local attractions and dining. **The focus should be on convenience, affordability, and flexibility**, encouraging Canadians to replace one long vacation further away with several smaller getaways throughout the year, spreading demand across seasons and regions.

Marketing should emphasize the ease, proximity, and value of provincial and regional travel. Hyper-local messaging, such as “explore your backyard” or “discover hidden gems close to home,” can be paired with enticing weekend or staycation packages to inspire action.

2

Anchor Storytelling in Trust and Pride

Position Canada as the safe, reliable, and welcoming choice, contrasting it with the uncertainty of U.S. travel.

Campaigns should weave in emotional storytelling that celebrates Canadian landscapes, traditions, and culture.

Reinforcing a “*Canada welcomes you*” narrative can spark national pride and strengthen loyalty to domestic travel.

3

Reframe Canada as the Winter Escape

With Canadians showing little appetite for escaping to the U.S. in the near future, there is an opportunity for tourism organizations to **challenge the traditional narrative of heading south for the winter by positioning Canadian destinations as exciting seasonal alternatives**. Campaigns can highlight the warmth of coastal retreats, the adventure of the Rockies, the wide-open beauty of the Prairies, the charm of Atlantic escapes, and the magic of Quebec’s winter resorts. By reframing Canada as the natural choice for winter getaways, these destinations can be promoted as compelling substitutes for sun-seekers, keeping travel spending at home.

Recommendations for Canadian Tourism Operators (*Continued*)

4

Seize the Opportunity to Attract American Visitors

Since a meaningful share of Americans are open to visiting Canada, this presents **an opportunity for Canadian tourism organizations to engage more directly with U.S. audiences. Campaigns can emphasize Canada's safety, accessibility, and rich diversity of landscapes and experiences** – from vibrant cities and cultural festivals to natural wonders and outdoor adventures – while positioning Canadian destinations as distinct alternatives to U.S. domestic travel.

By targeting receptive American travellers, particularly those under 35 or in nearby border states, Canadian operators can capture new demand at a time when Canadians themselves are choosing to stay closer to home.

Recommendations for U.S. Tourism Operators

1

Strengthen Domestic Travel Loyalty by Addressing Practical Pain Points

With nearly nine in ten American travellers travelling within the U.S. this summer, **American tourism operators should continue to focus on domestic travellers and market offers that match their specific needs.** Campaigns can celebrate regional diversity and promote hidden gems and secondary destinations, while emphasizing affordability, convenience, and pride in discovering more of America.

At the same time, operators should address the main reasons Americans change their plans – cost and scheduling conflicts – by offering flexible booking policies (easy cancellations, rebooking guarantees) to reduce uncertainty and encourage travellers to follow through with their plans. Messaging should highlight reliability and ease, making domestic trips both attractive and practical.

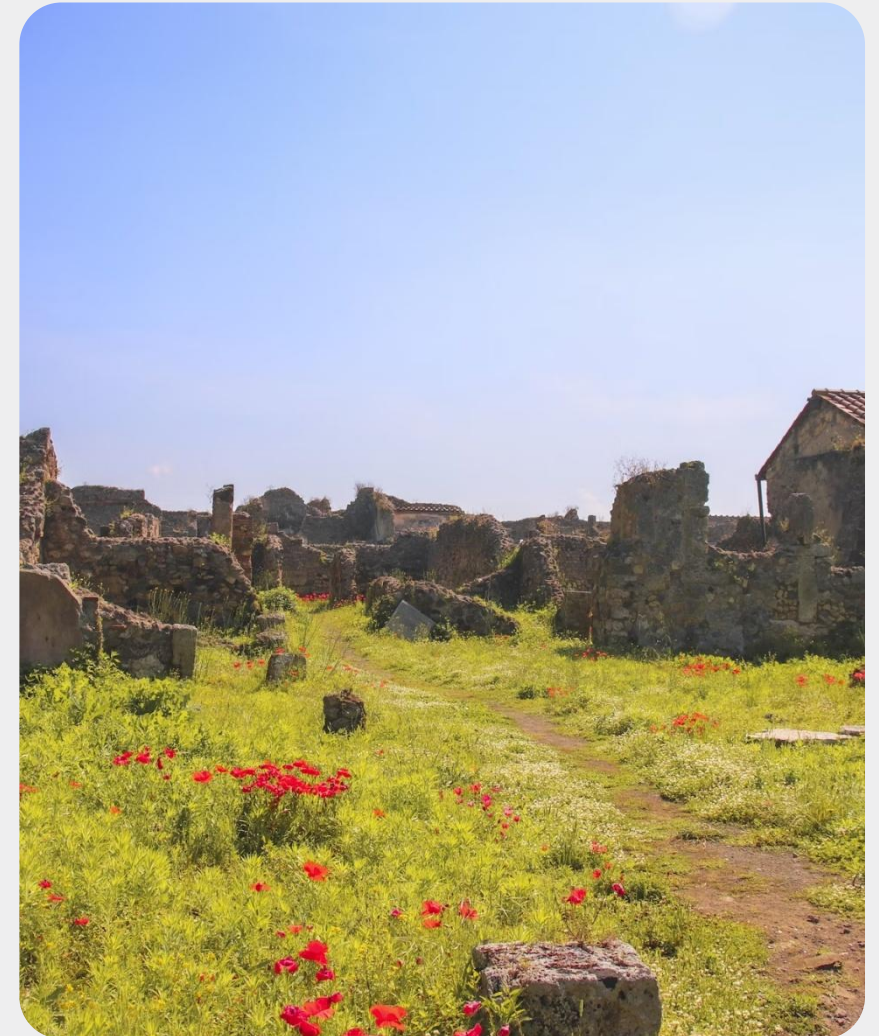
2

Counter the Political Climate Driving Canadians Away

The sharp decline in U.S.-bound travel is more about Canadians' reactions to political tensions and recent decisions from U.S. leadership. **American tourism operators should focus on separating politics from the travel experience,** emphasizing that Canadians are genuinely welcomed by communities across the U.S. Campaigns can highlight hospitality, local connections, and people-to-people warmth, reinforcing the message that “the politics don't reflect the people.”

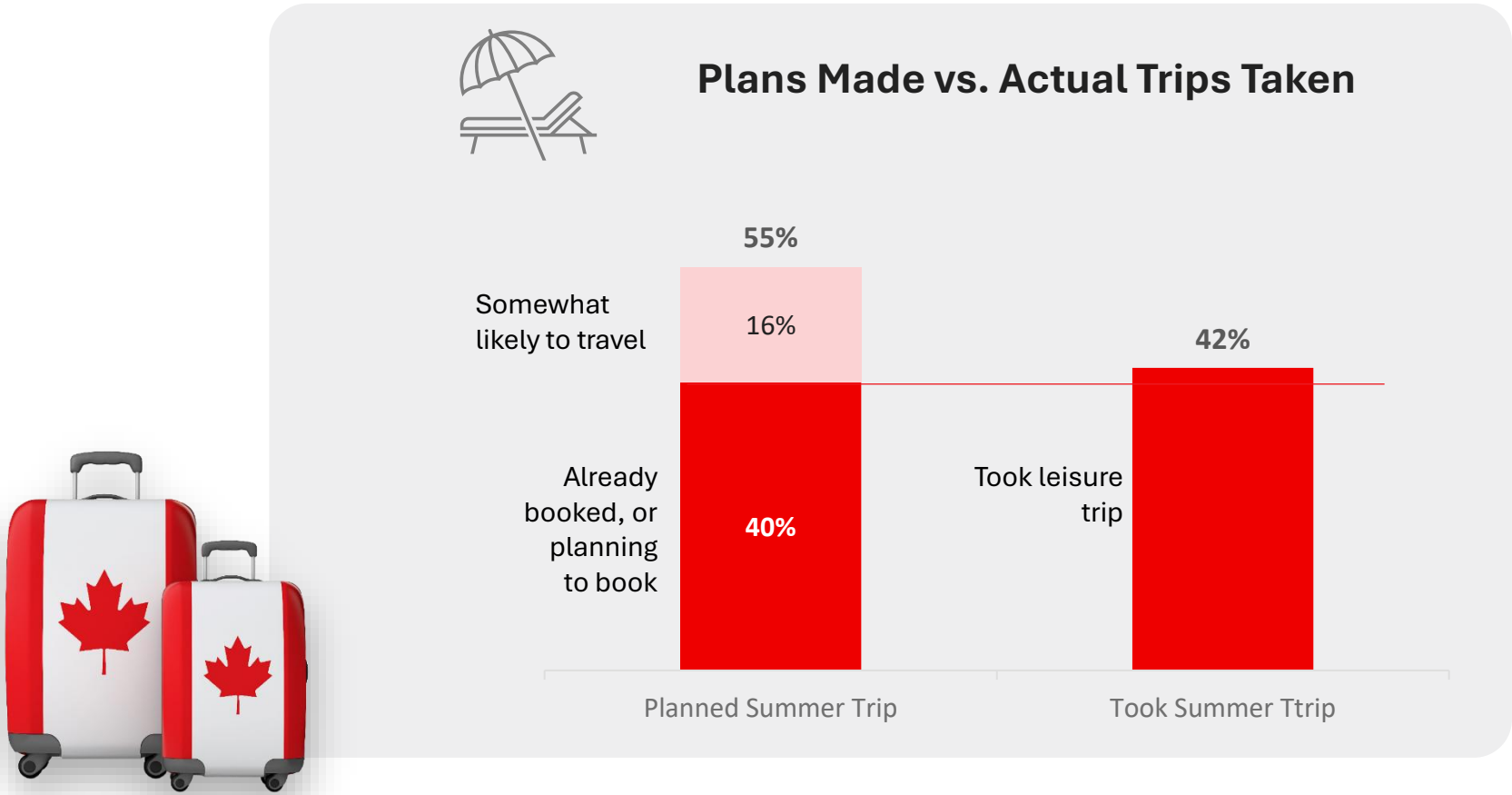
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Detailed Findings



Canadian Summer Travel: Plans Made vs. Trips Taken

Over the summer, just over two in five Canadians took a leisure trip, aligned with the proportion who had already booked or were planning a trip.

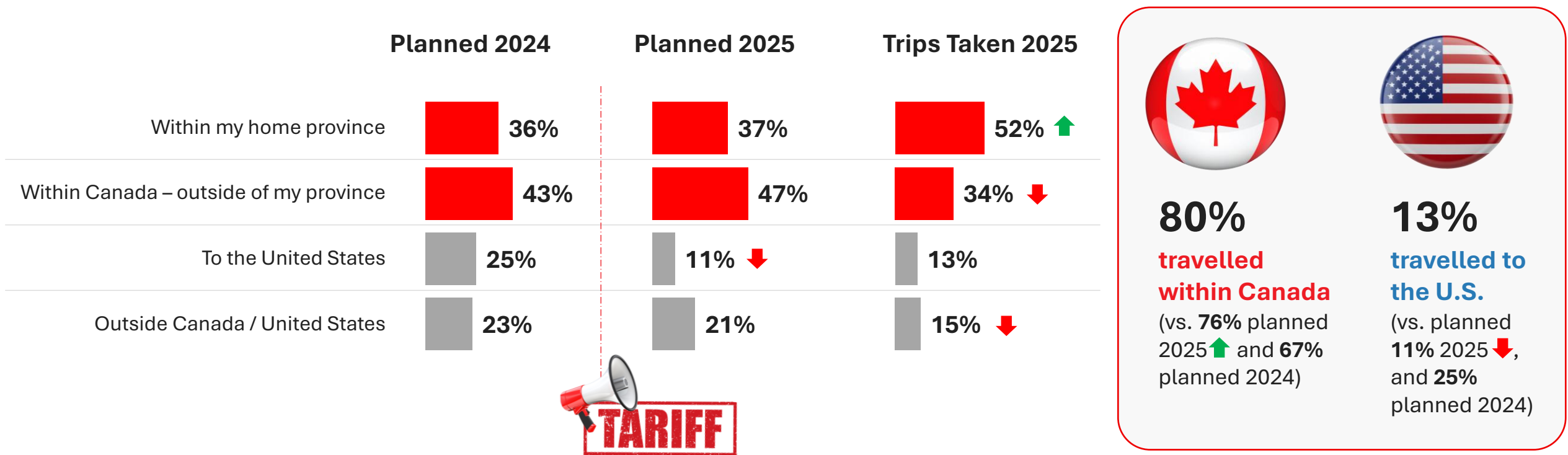


Base: Canadian residents. September 2025 (n=1,621), May 2025 (n=1,537)
CT1. Did you take a leisure trip this past summer (June to August 2025)
May 2025 - CTIA1. Are you planning to take a leisure trip during the summer (June to August 2025)?

↑ Statistically significantly **higher** than previous wave
↓ Statistically significantly **lower** than previous wave

Summer Leisure Travel Destinations: Plans Made vs. Trips Taken

Canadians prioritized domestic travel this summer, with more ultimately choosing to stay local (52% travelled within their home province compared to 37% who had originally intended to do so). In contrast, although close to half planned to travel outside their home province, only one-third actually did so. Lower cross-border trips to the U.S. compared to 2024 confirm a continued softening in U.S. visitation.





TARIFF



80%

travelled within Canada

(vs. 76% planned 2025 ↑ and 67% planned 2024)



13%

travelled to the U.S.

(vs. planned 11% 2025 ↓, and 25% planned 2024)

Base: Canadian residents who took/were planning to travel for leisure purposes. September 2025 (n=675); Sept 2025 - CT2. Where did you travel for leisure this past summer (June to August 2025)?

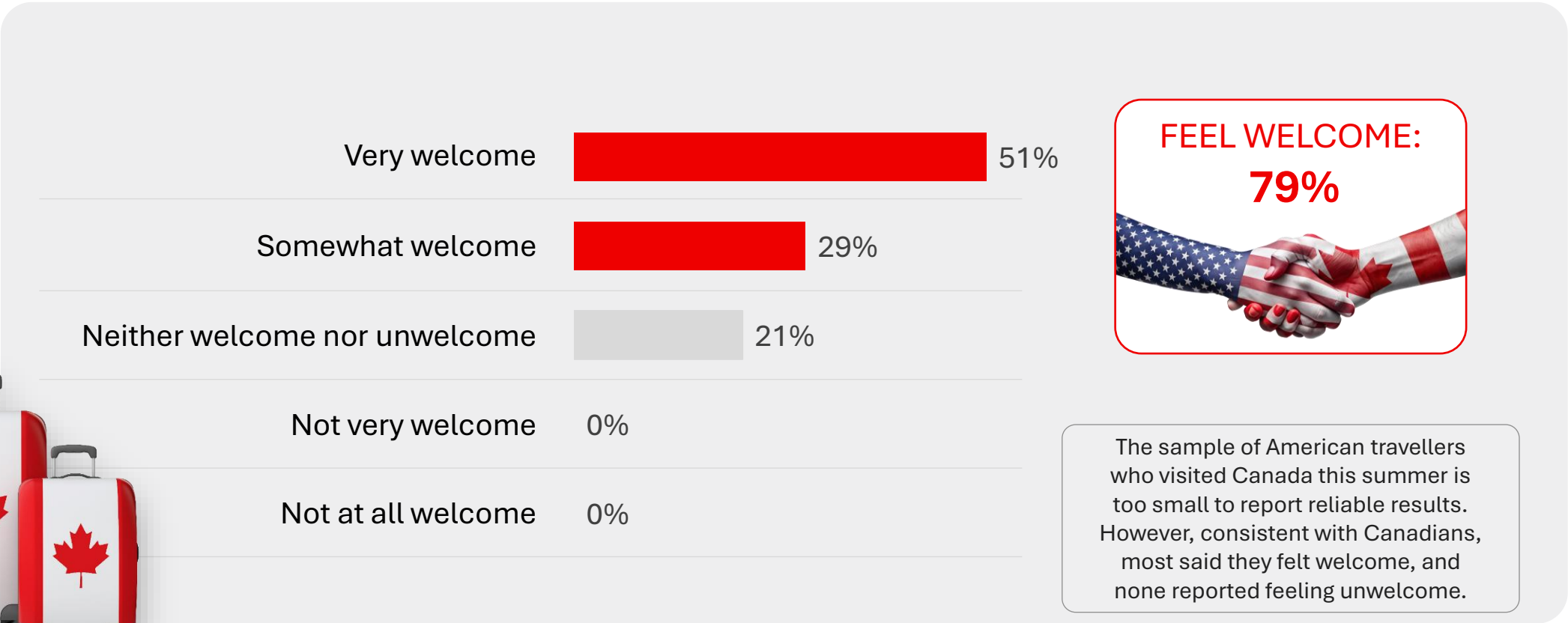
Base: Travellers who booked or planned to travel over the summer, excluding Not Sure. May 2025 (n=613), April 2024 (n=514) May 2025/April 2024 - CTIA2. Where are you planning to travel to for leisure this summer (June to August 2025)? (June to August 2024)? / (June to August 2025)?

↑ Statistically significantly higher than previous wave
↓ Statistically significantly lower than previous wave

13

Feeling of Welcome Among Canadians Visiting the U.S

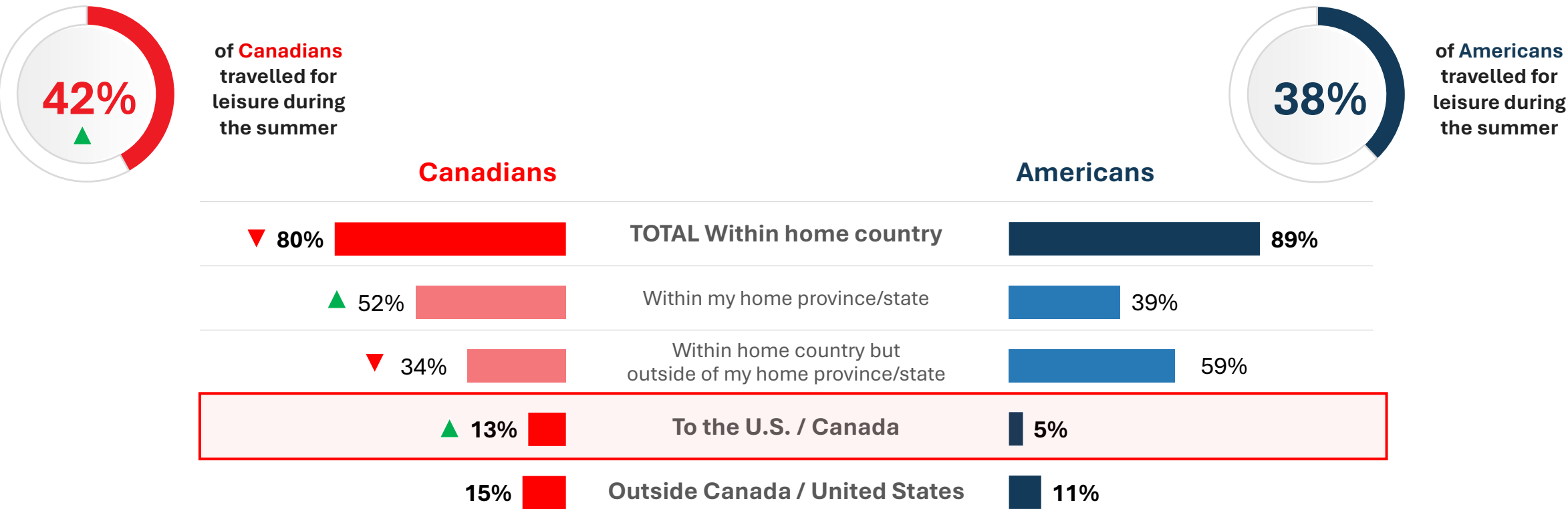
Nearly four in five Canadians (79%) who travelled to the U.S. this summer reported feeling welcome, with over half (51%) saying they felt very welcome. Conversely, not a single respondent reported feeling unwelcome.



Base: Canadian residents who travelled to the U.S. September 2025 (n=79*);*: Small base size (<100), interpret with caution.
Sept 2025 – CT2. Thinking about your leisure trip(s) to the United States this past summer, how welcome did you feel as a Canadian visitor?

Summer Leisure Travel Destinations: Canadians vs. Americans

More Canadians travelled for leisure this summer compared to Americans (42% vs. 38%), and both prioritized travel within their own country – especially Americans, at almost nine in ten. Canadians are more likely to favour travel within their home province than Americans are to stay within their own state. While Canadian travel to the U.S. has declined compared to 2024 (as mentioned in the previous slide), Canadians are still more likely than Americans to cross the border for leisure travel (13% vs. 5%).



Base: Canadian/ U.S. residents. Canada (n=1,621); U.S (n=1,015)
CT1/UST1. Did you take a leisure trip this past summer (June to August 2025)
Base: Canadian/ U.S. residents who travelled for leisure purposes. Canada (n=675); U.S.(n=398)
CT1b/UST1b. Where did you travel for leisure this past summer (June to August 2025)?

* In a study conducted in May 2024, 23% of Canadian residents planning to travel for leisure during the summer of 2024 intended to visit the U.S. (n=785);
▲ Statistically significantly higher than the U.S.
▼ Statistically significantly lower than the U.S.

Summer Travel 2025 – By Canadian Demographics

Overall, close to half of residents aged 35-54 travelled this summer, with younger adults more likely to have done so. Older Canadians who travelled tended to stay close to home, with six in ten staying in their home province. Albertans are most likely to have travelled within Canada (94%) and outside of their own province (60%), while younger Canadians aged 18-34 and Ontario residents are most likely to have travelled outside Canada/U.S.

Travel Destination	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	1,621	806	815	372	444	805	168	145	136	640	426	106
Yes (travelled over the summer)	42%	41%	43%	46%	48%	34%	40%	46%	39%	44%	38%	40%
(Among travellers) n=	675	339	336	168	223	284	69*	63*	55*	288	159	41**
NET Canada	80%	80%	79%	73%	79%	85%	81%	94%	82%	74%	78%	89%
Within my home province	52%	51%	53%	40%	54%	60%	56%	58%	54%	51%	54%	31%
Within Canada – outside of my province	34%	35%	34%	40%	30%	34%	27%	60%	36%	27%	29%	63%*
To the United States	13%	13%	13%	16%	16%	8%	14%	23%	18%	12%	10%	6%
Outside Canada / United States	15%	13%	16%	21%	14%	10%	16%	8%	2%	19%	16%	8%
No	57%	58%	56%	51%	51%	66%	60%	51%	59%	55%	62%	59%

Base: Canadian residents. September 2025 (n=1,621)

CT1. Did you take a leisure trip this past summer (June to August 2025)?

CT1b. Where did you travel for leisure this past summer (June to August 2025)? *Small base size, interpret with caution. **Very small base size, interpret with extreme caution

Significantly higher than comparison group(s)

Significantly lower than comparison group(s)

Summer Travel 2025 – By U.S. Demographics

Summer travel among Americans is largely consistent across gender, age, and most regions, with the exception of residents from the South, who are less likely to have travelled. Among Americans who travelled for leisure this summer, travel within the U.S. is especially strong among residents of the Midwest (97%) and South (94%). International travel is highest among those aged 35 to 54 and those who live in the Northeast (20%) and the West (18%). Interestingly, men are more likely to have visited Canada this summer compared to women.

Type of Travel	Total	Male	Female	18-34	35-54	55+	NE	MW	South	West
n=	1,015	467	548	179	341	495	194	218	390	213
Yes (travelled over the summer)	38%	37%	38%	42%	36%	36%	41%	37%	32%	44%
(Among travellers) n=	398	190	208	85*	121	192	82*	79*	143	94*
NET Within U.S.	89%	88%	89%	90%	83%	92%	79%	97%	94%	83%
Within my home state	39%	41%	38%	42%	41%	36%	37%	33%	42%	42%
Within the United States – outside of my home state	59%	58%	59%	62%	51%	62%	50%	72%	58%	56%
To Canada	5%	8%	2%	6%	4%	5%	11%	1%	3%	6%
Outside Canada / United States	11%	10%	13%	11%	19%	5%	20%	3%	6%	18%
No	62%	62%	61%	58%	64%	63%	57%	63%	67%	56%

Base: American residents. September 2025 (n=1,015)
UST1. Did you take a leisure trip this past summer (June to August 2025)?
UST1b. Where did you travel for leisure this past summer (June to August 2025)? *Small base size, interpret with caution

Significantly higher than comparison group(s)
Significantly lower than comparison group(s)

Impact of Tariff Announcements/ Political Climate on Travel to the U.S.

Beyond the many Canadians who had already decided against travelling to the U.S. this summer, the political climate reinforced hesitation among others, with over a quarter (27%) changing their plans (postponing, cancelling, or choosing another destination), and under one in ten (8%) ultimately travelling to the U.S. as planned.

NET: Affected Travel Plans 27%

I cancelled a previously booked trip 7%

I postponed or delayed my trip to the U.S 13%

I had planned to go to the U.S. but visited a different destination instead 10%

I was not planning to travel to the U.S., and I didn't travel 65%

I travelled to the U.S. as originally intended 8%



Impact of Political Climate on Travel to the U.S. – By Demographics

U.S. travel disruptions are not affecting all Canadians equally. Men are most likely to have changed their plans and younger Canadians aged 18-34 are most likely to have cancelled a previously booked trip. Atlantic (76%) and Quebec residents (71%), those aged 55+ (72%), and women (68%) are most likely to have not planned a trip to the U.S. in the first place.

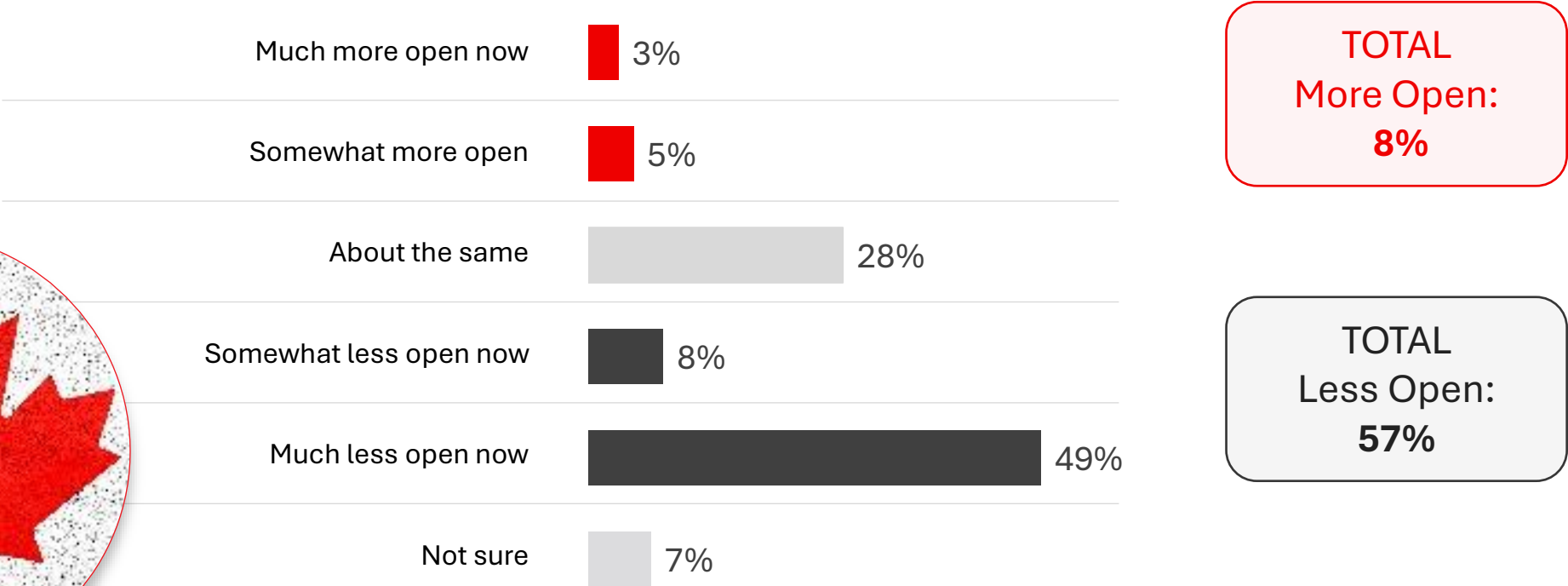
Travel Destination	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	1,621	806	815	372	444	805	168	145	136	640	426	106
NET: Affected Travel Plans	27%	30%	24%	29%	29%	23%	28%	26%	26%	30%	24%	19%
I cancelled a previously booked trip	7%	9%	5%	11%	6%	6%	9%	6%	8%	9%	4%	5%
I postponed or delayed my trip to the U.S	13%	13%	12%	12%	14%	12%	16%	12%	9%	14%	11%	9%
I planned to go to the U.S. but now intend to visit a different destination	10%	12%	9%	11%	12%	9%	7%	12%	13%	12%	9%	9%
I was not planning to travel to the U.S., and I didn't travel	65%	62%	68%	60%	60%	72%	62%	62%	66%	62%	71%	76%
I still plan to travel to the U.S. as originally intended	8%	8%	8%	11%	11%	5%	11%	12%	8%	8%	5%	5%

Base: Canadian residents, (n=1,621)
CT3. How, if at all, have the U.S. tariff announcements and statements about Canada by President Trump affected your summer travel plans to the United States?

Significantly higher than comparison group(s)
Significantly lower than comparison group(s)

Openness to Travelling to the U.S. in the Next 6 Months

The political climate between the U.S. and Canada continues to impact Canadians’ travel intentions to the U.S., with no signs of improvement in the near term. Compared to six months ago, nearly three in five Canadians now feel **less** open to travelling south in the next six months, including half who say they are much less open. By contrast, only 8% report being **more** open to U.S. travel than they were six months ago.



Base: Canadian residents. September 2025 (n=1,621)
CT4. Compared to how you felt about travelling to the United States six months ago, how open are you to travelling to the U.S. in the next six months?

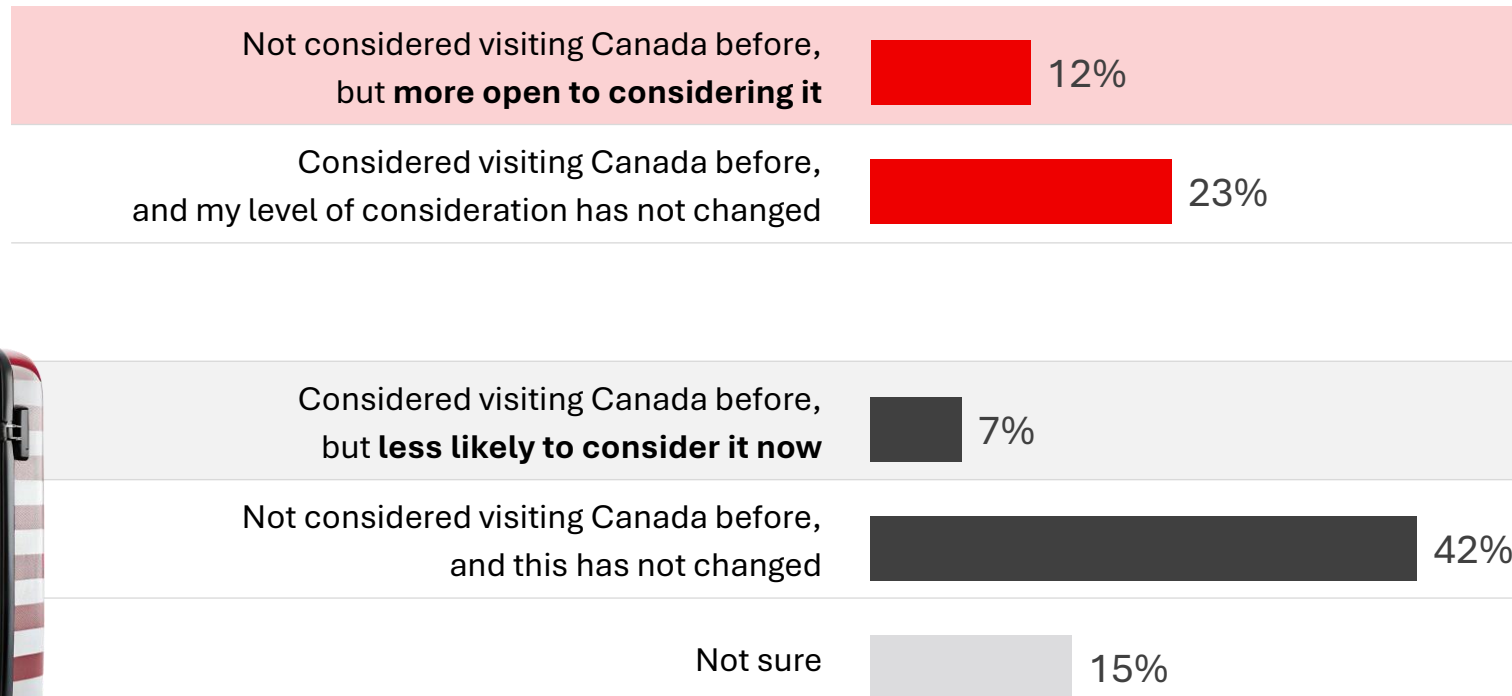
Openness to Travelling to the U.S. in the Next 6 Months – By Demographics

Older Canadians aged 55+ are the most likely to feel less open to visiting the U.S. (70%), and over half of Quebec residents (54%) are **much less** open. Conversely, younger adults aged 18 to 34 and men are the most open to U.S. travel (17% and 13%, respectively).

Open to Travel	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	1,621	806	815	372	444	805	168	145	136	640	426	106
NET More Open	8%	13%	4%	17%	8%	3%	11%	8%	12%	10%	6%	2%
Much more open now	3%	5%	2%	3%	5%	2%	3%	4%	5%	4%	2%	0%
Somewhat more open	5%	8%	2%	14%	3%	1%	8%	3%	7%	5%	4%	2%
About the Same	28%	26%	29%	29%	34%	22%	31%	35%	27%	26%	26%	26%
NET Less Open	57%	54%	60%	43%	52%	70%	55%	46%	52%	59%	61%	64%
Somewhat less open	8%	8%	8%	12%	7%	6%	6%	4%	11%	10%	7%	10%
Much less open	49%	47%	51%	31%	45%	64%	49%	42%	42%	49%	54%	54%
Not Sure	7%	7%	7%	10%	6%	5%	4%	11%	9%	6%	7%	8%

Impact of Political Climate on Travel to Canada **Among Americans**

The tension between Canada and the U.S. does not seem to negatively affect Americans' travel considerations to Canada: fewer than one in ten (7%) say they are now less likely to visit. Nearly a quarter (23%) had already considered a trip and remain unchanged in their interest, while more than one in ten (12%) are now more open to visiting. These results suggest that interest in visiting Canada is rooted more in underlying preferences than in political dynamics.



TOTAL Open to Visit Canada:
35%

Impact of Political Climate on Travel to Canada

Among Americans

– By Demographics

Compared to older travellers, Americans aged 18 to 54 are more open to visiting Canada. Close to two in ten residents aged 18 to 34 who **had not** previously considered Canada are now more open to travel there, as are 16% of those from the South. In contrast, over one in ten younger Americans aged 18 to 34 and men who **had previously** considered Canada are now less likely to do so due to geopolitical events.

Likely to Consider Travel to Canada	Total	Male	Female	18-34	35-54	55+	NE	MW	South	West
n=	1,015	467	548	179	341	495	194	218	390	213
NET Open to Visit	35%	36%	35%	41%	37%	30%	41%	34%	33%	37%
Not considered visiting Canada before, but more open to considering it	12%	13%	12%	18%	13%	7%	8%	5%	16%	15%
Considered visiting Canada before, and my level of consideration has not changed	23%	23%	23%	23%	24%	23%	32%	28%	17%	22%
Considered visiting Canada before, less likely to consider it now	7%	11%	3%	12%	5%	5%	11%	6%	7%	6%
Not considered visiting Canada before, and this has not changed	42%	39%	45%	30%	36%	55%	32%	43%	47%	41%
Not Sure	15%	13%	17%	16%	21%	10%	16%	17%	13%	17%

Change in Leisure Travel Plans and Behaviour among American Residents

One in five Americans altered their leisure travel plans in the past year. Changes were driven mainly by practical considerations, including cost of travel, personal reasons/scheduling conflicts, and weather-related concerns. Political influences played a smaller role, with one in ten (13%) citing broader geopolitical tensions and 8% pointing to U.S./Canada tariff disputes.



Base: U.S. residents. September 2025 (n=1,015)
UST5. In the past year, did you do anything differently when planning or taking your leisure trips? Multiple answers possible
Base: U.S. residents who changed their travel plans over the last year. September 2025 (n=184)
UST6. What were the reasons you changed your travel plans this past summer? Multiple answers possible

Changes in Leisure Travel Plans and Behaviour among American Residents

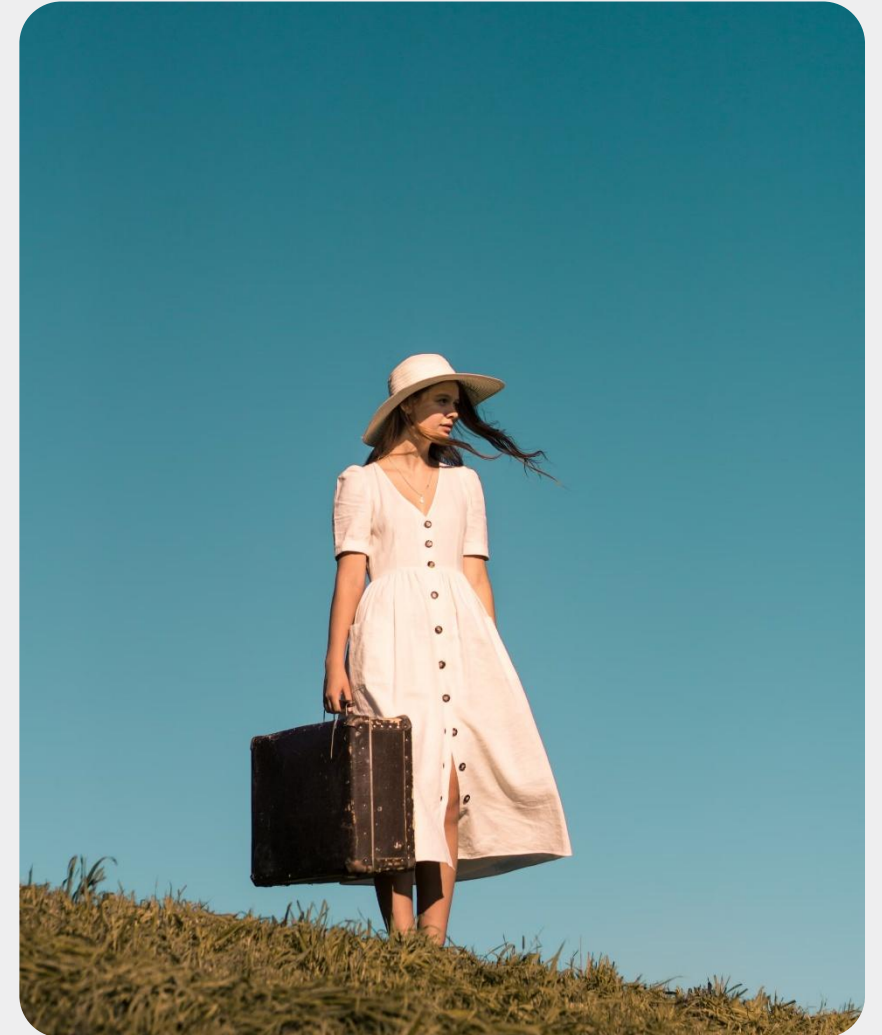
– By Demographics

Changes in travel plans were most common among younger adults aged 18 to 34 (28%), while those aged 35 to 54 are most likely to have chosen a different travel destination (13%). When it comes to follow-through, older adults are most likely to have travelled as planned (44%).

Change in Plans	Total	Male	Female	18-34	35-54	55+	NE	MW	South	West
n=	1,015	467	548	179	341	495	194	218	390	213
NET Cancelled/postponed/different destinations	20%	22%	18%	28%	23%	12%	24%	18%	19%	19%
I cancelled a trip I had already booked	4%	4%	4%	7%	3%	3%	7%	4%	4%	1%
I postponed or delayed a trip	10%	12%	9%	14%	11%	8%	10%	11%	10%	10%
I chose a different destination than originally planned	8%	9%	7%	10%	13%	2%	9%	4%	8%	11%
I did not plan to travel, and I did not travel	45%	44%	45%	40%	47%	45%	41%	44%	49%	42%
I travelled as originally planned	38%	37%	38%	35%	32%	44%	36%	40%	34%	42%

3

Respondent Profile



Weighted and Unweighted Sample

The tables below present the distribution of respondents on key variables before and after weighting.

September 2025		
	Weighted	Unweighted
Region Canada	1,621	1,621
British Columbia	226	168
Alberta	178	145
Saskatchewan/Manitoba	104	136
Ontario	629	640
Quebec	375	426
Atlantic	109	106
Region US	1,015	1,015
Northeast	175	194
Midwest	217	218
South	384	390
West	239	213

September 2025				
Area	Canadian Residents		U.S. Residents	
	Weighted	Unweighted	Weighted	Unweighted
Urban	678	709	335	270
Suburban	633	607	491	532
Rural	298	297	189	213
Gender				
Male	792	806	487	467
Female	829	815	528	548
Age				
18-34	431	372	274	179
35-54	522	444	342	341
55+	668	802	400	495

Contact Us

For more information on this study, please contact our experts:



Jane Ha-Trapp

Senior Vice-President
jhatrapp@leger360.com
403-209-4110



Steve Mossop

Executive Vice-President
smossop@leger360.com
604-424-1017

Our Services

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End-to-end research solutions

Customer Experience (CX)

Strategic and operational customer experience consulting services

Leger Analytics (LEA)

Data modelling and analysis

Leger Opinion (LEO)

Panel management

Leger Communities

Online community management

Leger Digital

Digital strategy and user experience

Products

Solutions that integrate AI, innovation, and the latest technologies

International Research

Worldwide Independent Network (WIN)

600
employees

185
consultants

8
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