



Report

Canadian Travel Intentions & Emerging Trends

June 5, 2025

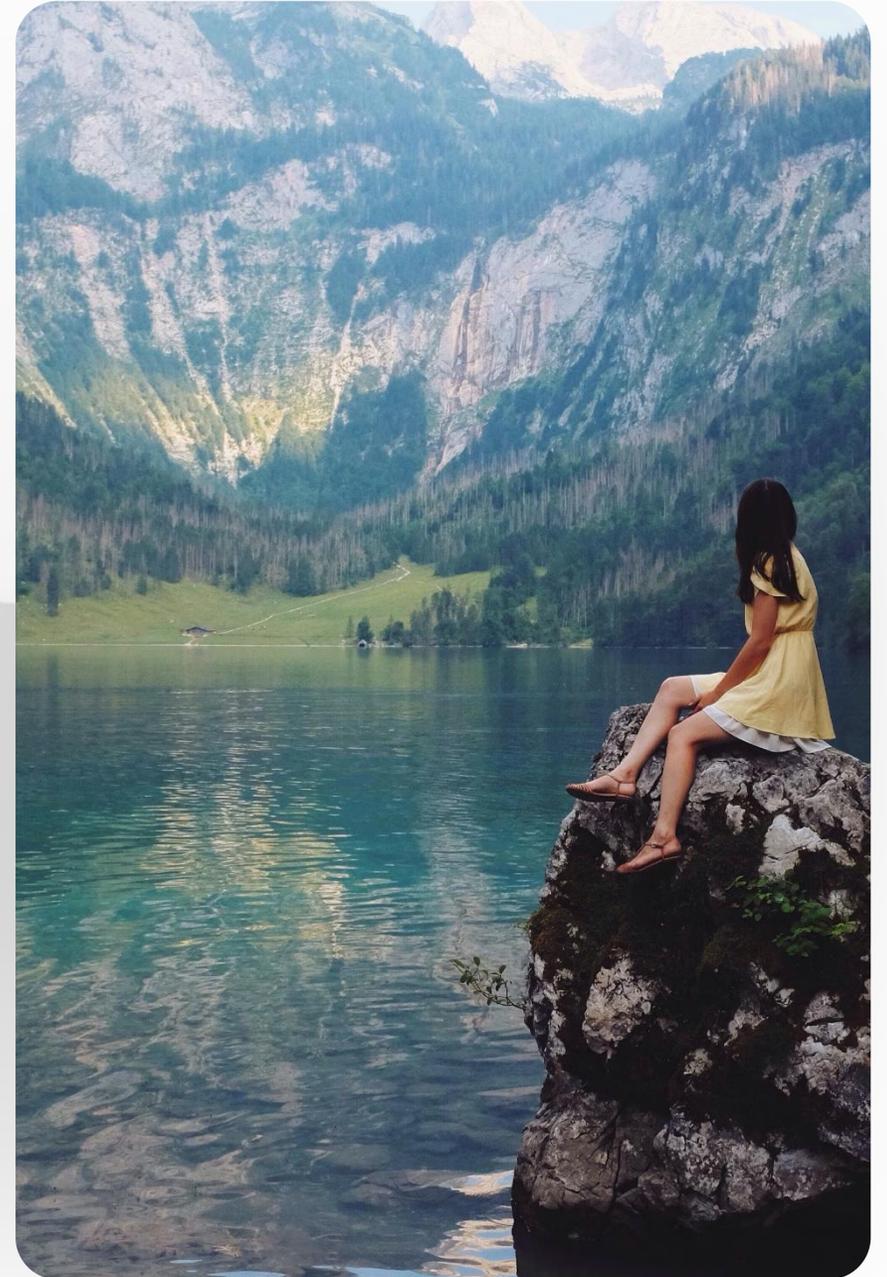
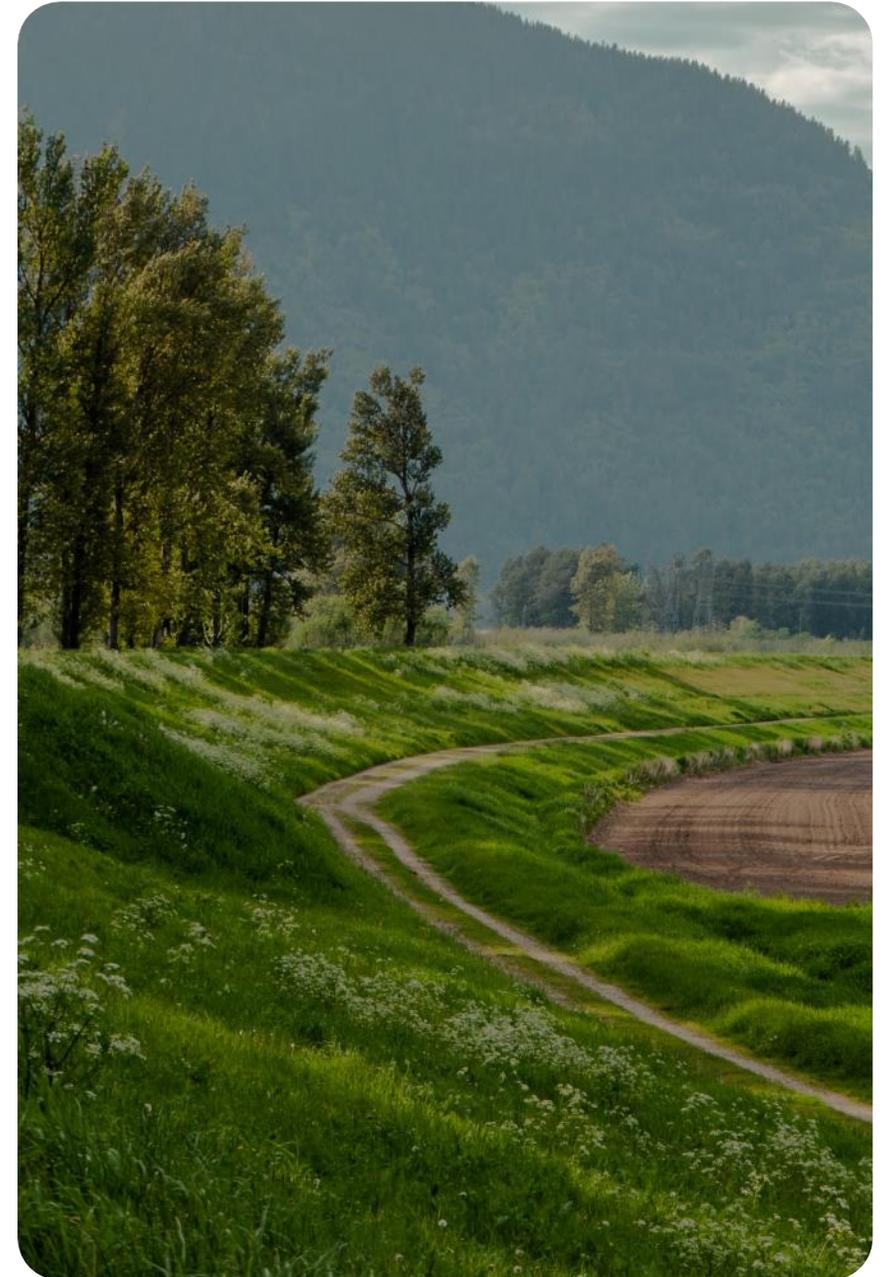


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Methodology



Methodology

Online survey with Canadian residents 18 years or older.

- Summer 2024: n=1,610
- Spring 2025: n=1,527
- **Summer 2025: n= 1,537**

Respondents were randomly recruited using LEO's online panel.



When

Summer 2024: April 25-28, 2024
Spring 2025: February 1-2, 2025

Summer 2025: May 16-19, 2025



Margin of Error

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

For comparison purposes, a probability sample of this size yields a margin of error no greater than $\pm 2.50\%$ (19 times out of 20)..



Weighting

Results were weighted according to age, gender, and region to ensure a representative sample of the Canadian population using data from Statistics Canada's latest census.

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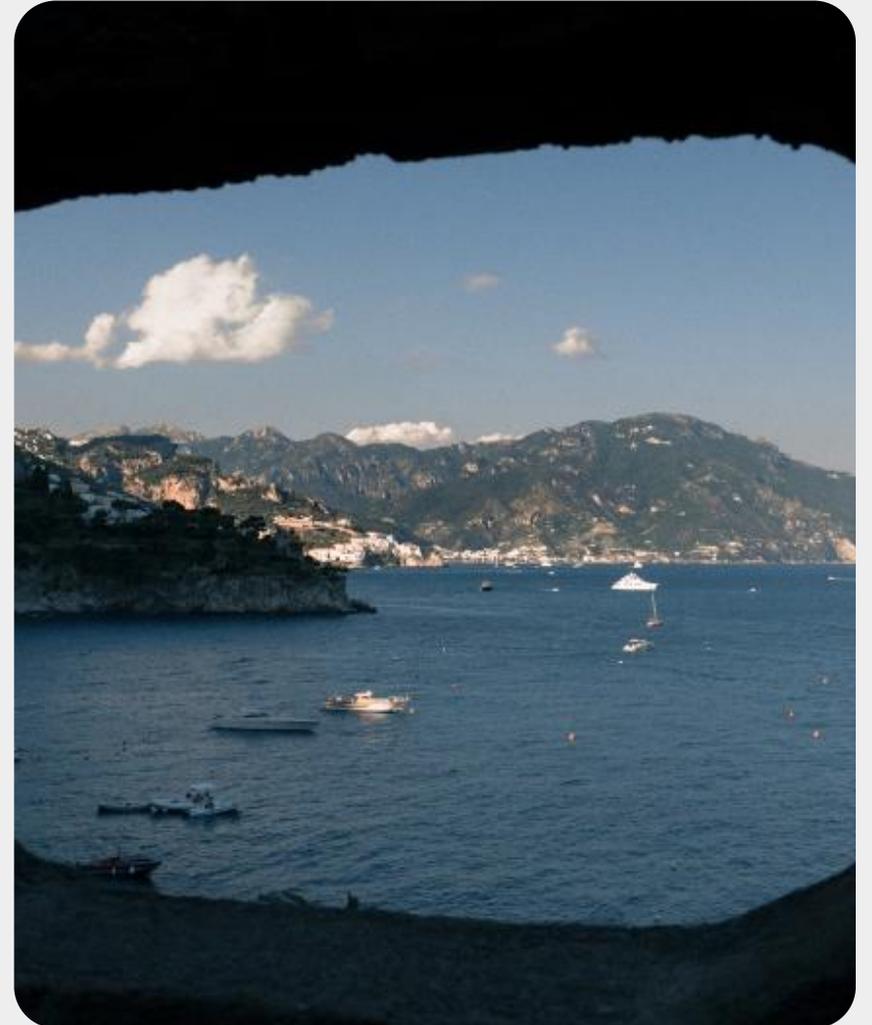
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1

Key Findings & Implications



Key Findings

Summer travel intention is surging in 2025.

Over half of Canadians plan to take a leisure trip this summer (up significantly from 2024).



Although overall summer travel intentions are strong, interest in U.S.-bound travel this summer is collapsing.



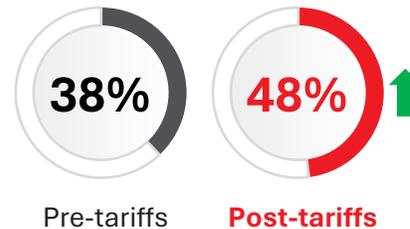
The U.S tariff backlash is real.

Over seven-in-ten say they are **less likely** to visit the U.S. throughout 2025 compared to last year.

Less likely to travel to the U.S. in 2025

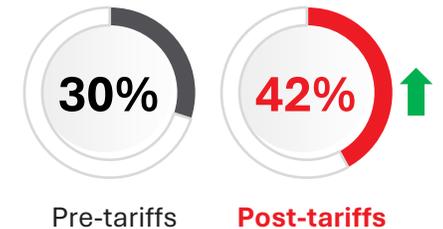


More likely to travel within home province in 2025



Meanwhile, domestic tourism intentions are soaring as more Canadians plan local or interprovincial trips.

More likely to travel to other provinces in 2025



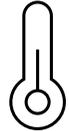
↑ Statistically significantly higher than previous wave

Key Findings *Continued*

However, Canadians are avoiding U.S. travel due to more than just tariffs – **poor exchange rates** and **safety concerns** are also key deterrents.



64%
Tariff/trade tensions



61%
Political climate



47%
Feeling unsafe



46%
Poor exchange rate



44%
Don't feel welcome



Some Canadians **still plan to go to the U.S.**, undeterred by the political climate.

Top Reasons
for Still Planning to Visit the U.S.



Three-quarters of Canadians who were planning a trip to the U.S. say the **tariff announcements** have **influenced their travel plans.**



Tariffs affected travel plans



56% **Planned to go to the U.S. but now intend to visit a different destination**

21% **Cancelled a previously booked trip**

6% **Considering cancelling a booked trip**

Recommendations for Canadian Tourism Operators

1

Capitalize on Rising Domestic Travel Demand

With domestic tourism booming amid growing anti-Trump sentiment, there's a key opportunity to capture spending redirected from U.S. travel. Many Canadians are now seeking local alternatives, making it an ideal time to highlight **affordable, culturally rich, and unique experiences** across Canada.

- Invest in marketing campaigns that promote **“close-to-home” exploration**, emphasizing hidden gems, nature, and community-driven experiences.
- Use **“pride and proximity”** messaging that taps into national pride and a deeper connection to Canada's landscapes, culture, and people.

2

Leverage Younger Travellers as Catalysts

Canadians aged 18–54 are leading the surge in interprovincial travel and are eager to explore new parts of the country.

- Use **digital-first campaigns** to showcase authentic, experience-rich travel – highlighting adventure, culture, and local flavour.
- Feature **user-generated content** such as Instagram photos, TikTok clips, and YouTube videos to build credibility and word-of-mouth appeal.

3

Strengthen Regional Collaboration

With interprovincial travel on the rise, there's an opportunity for tourism operators and destination marketing organizations to collaborate across regions.

- Create **joint** itineraries or bundled promotions that link nearby destinations through themes like food, culture, or nature.
- **Cross-promote** events and attractions to make multi-stop trips more seamless and attractive.

Recommendations for U.S. Tourism Operators

1

Rebuild Trust and Confidence Among Canadian Travellers

With U.S.-bound travel in steep decline, concerns around safety, political climate, and feeling unwelcome are major deterrents for Canadian travellers.

- Prioritize messaging that **reassures Canadians** about safety, hospitality, ease of entry, and respectful treatment.
- Be transparent in **addressing concerns** and highlight the destination's inclusive values and welcoming, cross-cultural environment.
- Focus on a **"it's them, not us"** message – demonstrate to travellers that the vast majority of Americans are very welcoming of Canadian tourists.

2

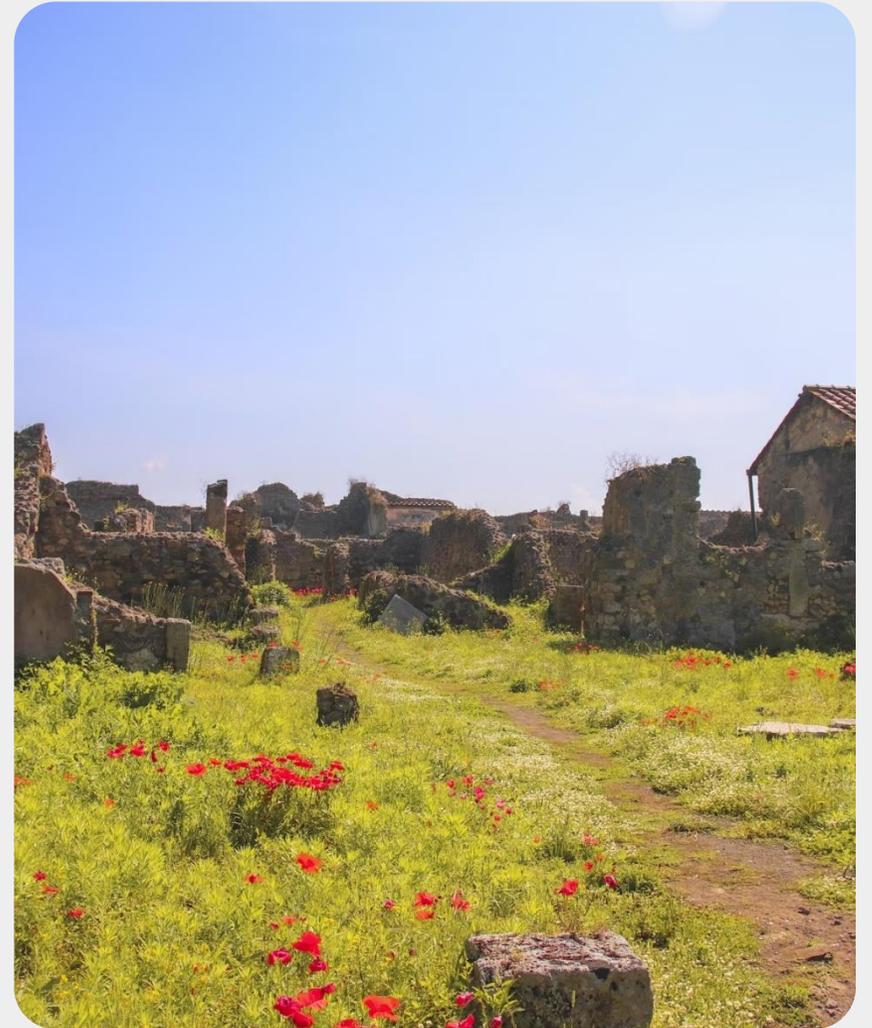
Target the Most Open Segments

Canadian men, younger travellers, and Albertans remain more open to U.S. travel and are less affected by recent barriers.

- Focus marketing on **niche motivators** such as visiting family and friends, attending sports events, or cross-border shopping.

2

Detailed Findings



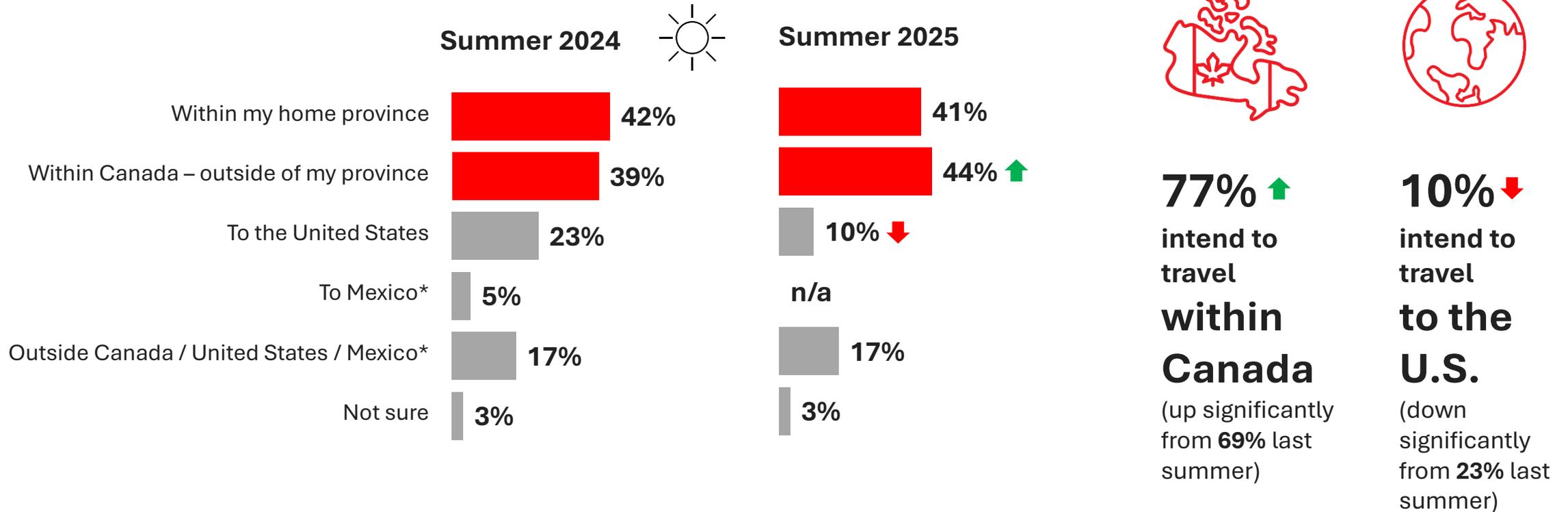
Summer Travel Plans 2025 – By Demographics

The rebound in summer 2025 travel intent is being driven by both ends of the age spectrum and key regional markets. Younger Canadians aged 18 to 34 (+11 points from 2024) and residents of Alberta (+12), Ontario (+10), and Quebec (+15) show the largest year-over-year increases and are the most likely to be planning summer leisure travel in 2025. In contrast, intent remains lower among older adults 55+ (despite a 9-point gain) and among Manitoba/Saskatchewan residents.

Type of Travel	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	1,537	801	736	424	475	638	161	133	125	604	412	102
NET YES	55%	56%	54%	63%	57%	48%	49%	63%	43%	57%	56%	48%
Yes, already booked	20%	18%	22%	21%	19%	19%	20%	22%	14%	20%	21%	15%
Planning but not booked	20%	21%	18%	25%	23%	14%	18%	26%	17%	21%	17%	19%
Somewhat likely to travel	16%	17%	14%	17%	15%	15%	12%	15%	12%	16%	19%	15%
No	37%	37%	37%	29%	33%	45%	39%	30%	48%	34%	38%	46%
Not sure	8%	7%	9%	8%	10%	7%	12%	7%	10%	8%	6%	6%

Summer Leisure Travel Destinations 2024 vs. 2025

A sharp decline in U.S. travel intention is fueling a surge in domestic tourism this summer, with Canadians opting for trips within their own province or to other Canadian provinces.



Base: Canadian residents who are planning to travel for leisure purposes. Summer 2024 (n=785); Summer 2025 (n=865)
 CTIA2. Where are you planning to travel to for leisure this summer (June to August 2024) / (June to August 2025)?
 Note: * Mexico attribute asked in summer 2024 survey, not asked in summer 2025

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

Summer Leisure Travel Destinations 2025 – By Demographics

Domestic tourism strategies should be tailored by both age and region. During the summer, Canadians aged 35+ plan to stay closer to home, while younger travellers favour interprovincial trips. Atlantic Canadians show the strongest domestic travel intentions. Compared to those in other regions, Albertans remain most interested in U.S. travel this summer, while Ontarians are most likely to consider destinations beyond North America.

Travel Destination	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	865	462	403	264	284	317	81*	83*	62*	353	235	51*
NET Canada	77%	76%	78%	71%	80%	78%	80%	74%	80%	74%	76%	94%
Within my home province	41%	41%	41%	28%	45%	48%	48%	38%	25%	41%	43%	41%
Within Canada – outside of my province	44%	43%	45%	51%	45%	38%	44%	54%	59%	40%	40%	60%
To the United States	10%	10%	10%	14%	10%	7%	10%	17%	13%	9%	10%	4%
Outside Canada / United States	17%	16%	19%	19%	18%	16%	12%	11%	8%	23%	19%	9%
Not sure	3%	4%	2%	6%	1%	3%	4%	8%	6%	3%	1%	0%

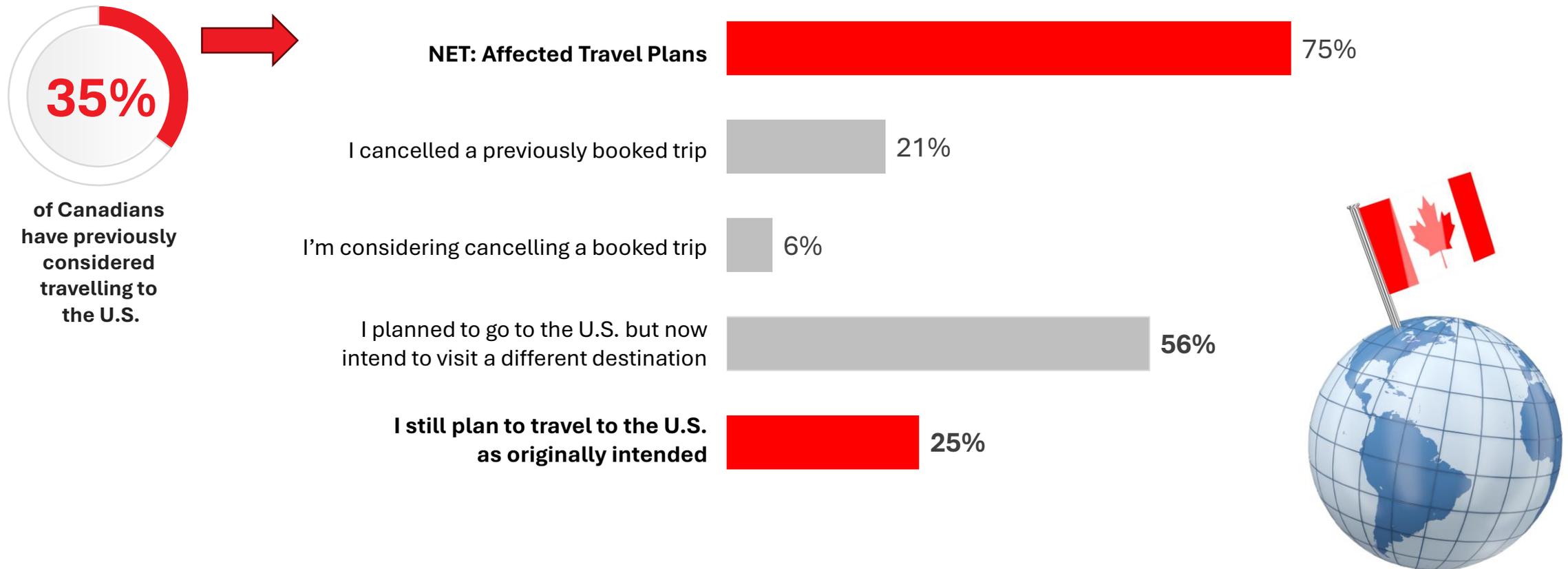
Base: Canadian residents who are planning to travel for leisure purposes. Summer 2025 (n=865).
CTIA2. Are you planning to take a leisure trip during the summer (June to August 2025)?

*Small base size, interpret with caution

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

Impact of Tariff Announcements on Travel Plans to the United States

Tariffs and Trump policies have had a dramatic impact on existing travel plans to the U.S. Among the 35% of Canadians who had been considering a trip to the United States, three-quarters have been impacted by recent tariff announcements. Over half now intend to visit a different destination, while one-in-five have cancelled a previously booked trip. One-quarter still plan to travel to the U.S.



Base: Canadian residents, excluding not planning to travel to the U.S. and Not sure. Summer 2025 (n=542)
 CTIA3a. How, if at all, have recent U.S. tariff announcements and statements about Canada by President Trump affected your travel plans to the United States?

Impact of Tariff Announcements on Travel Plans – By Demographics

Tariffs are not affecting all Canadians equally. British Columbians, Ontarians, and Quebecers are most likely to have changed their U.S. plans, while Albertans remain more committed to cross-border travel.

Travel Destination	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	542	293	249	163	170	209	65*	51*	42*	218	138	28**
NET: Affected Travel Plans	75%	73%	76%	76%	76%	72%	82%	56%	71%	79%	73%	69%
I cancelled a previously booked trip	21%	22%	20%	21%	21%	21%	23%	15%	27%	28%	11%	15%
I'm considering cancelling a booked trip	6%	8%	4%	10%	5%	4%	7%	3%	1%	6%	6%	12%
I planned to go to the U.S. but now intend to visit a different destination	56%	52%	60%	51%	60%	56%	59%	45%	45%	57%	60%	53%
I still plan to travel to the U.S. as originally intended	25%	27%	24%	24%	24%	28%	18%	44%	29%	21%	27%	31%

Base: Canadian residents, excluding not planning to travel to the U.S. and Not sure. Summer 2025 (n=542)

CTIA3a. How, if at all, have recent U.S. tariff announcements and statements about Canada by President Trump affected your travel plans to the United States?

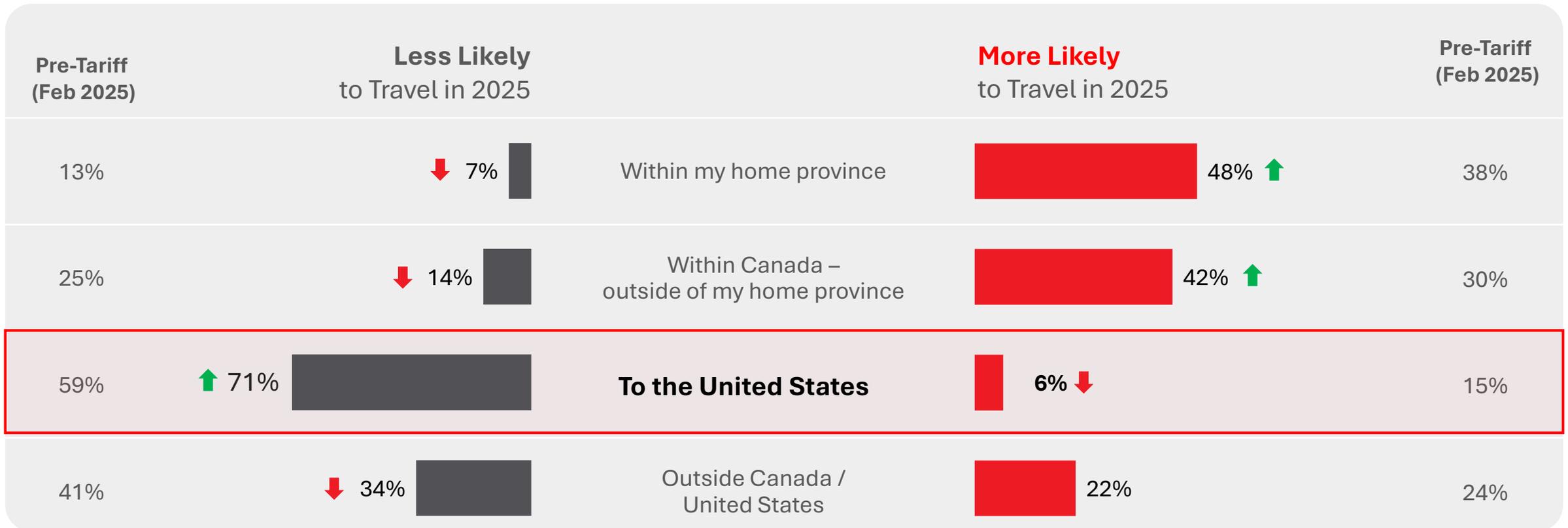
* Small base size, interpret with caution **Very small base size, interpret with extreme caution

Significantly higher than comparison group(s)

Significantly lower than comparison group(s)

Change in 2025 Leisure Travel Destinations: Pre vs. Post Tariffs

Domestic tourism demand is rising as shifting cross-border dynamics prompt Canadians to reallocate U.S. travel plans to destinations within their own province or other Canadian provinces. Since the U.S. tariffs on Canada took effect, intent to visit the U.S. has dropped sharply. Over seven-in-ten Canadians now say they are less likely to visit, up from 59% in February 2025, before the tariffs were announced.



Base: Canadian residents. Spring 2025 (n= 1,533); Summer 2025 (n=1,537)
CTIA3. How does your likelihood of travelling for leisure to the following destinations in 2025 compare to last year?

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

Change in 2025 Leisure Travel Destinations: **More Likely** to Travel – By Demographics

This shift towards increased domestic travel in 2025 is especially strong in Quebec, Ontario, and British Columbia where residents are now significantly more likely to plan travel within their province or to other parts of Canada. While domestic travel intent is rising across most groups, younger Canadians are more likely to look beyond their home province, and men are more inclined than women to consider travel to the U.S.

% MORE likely to travel	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	1,537	801	736	424	475	638	161	133	125	604	412	102
Within my home province	48%	47%	49%	47%	48%	48%	48%	42%	32%	48%	56%	38%
Within Canada – outside of my province	42%	42%	43%	46%	41%	41%	44%	32%	41%	45%	44%	41%
To the United States	6%	8%	4%	10%	6%	3%	4%	6%	4%	6%	8%	6%
Outside Canada / United States	22%	23%	21%	26%	21%	20%	21%	21%	15%	22%	25%	17%

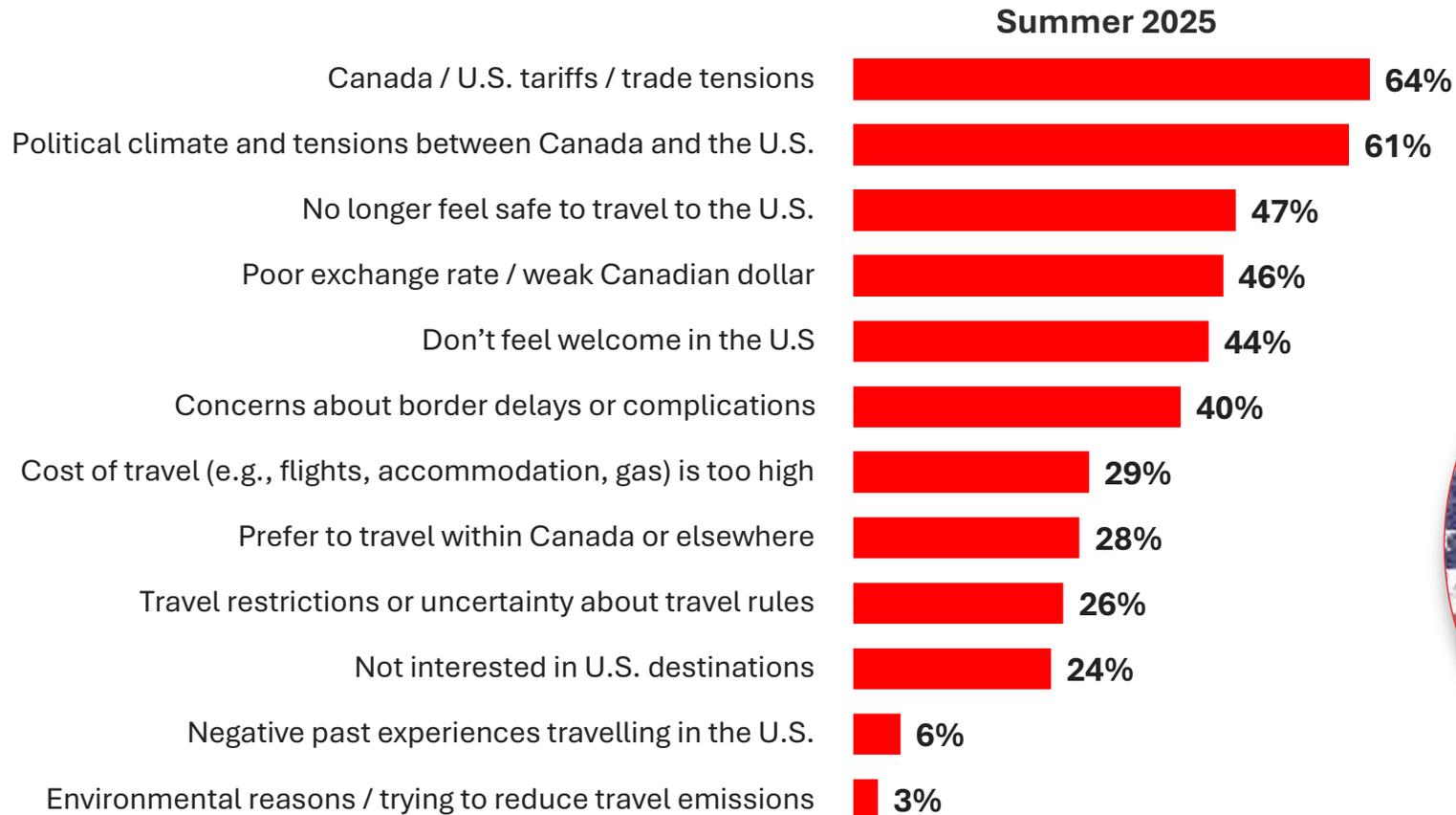
Change in 2025 Leisure Travel Destinations: **Less Likely** to Travel – By Demographics

Women and Canadians aged 35+ are pulling back from U.S. travel, suggesting a need for more trust-building by U.S. destinations focused on cross-border travel. Compared to a year ago, women and older Canadians 55+ are the most likely to have reduced their travel to the United States. Albertans are the least likely to have done so.

% LESS likely to travel to	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	1,537	801	736	424	475	638	161	133	125	604	412	102
Within my home province	7%	7%	7%	7%	7%	6%	9%	5%	6%	6%	8%	5%
Within Canada – outside of my province	14%	15%	13%	10%	12%	18%	13%	11%	8%	12%	22%	11%
To the United States	71%	65%	77%	61%	69%	79%	76%	59%	67%	70%	75%	77%
Outside Canada / United States	34%	31%	36%	23%	32%	42%	34%	24%	39%	32%	35%	50%

Reasons for Being Less Likely to Travel to the United States

Canadians' decisions to avoid U.S. travel are being driven by more than just tariffs. While over six-in-ten indicate tariffs and political tensions as key concerns, other key factors include safety concerns, poor exchange rate, not feeling welcome, and concerns about border delays, highlighting how both policy and perception are shaping cross-border travel decisions.



Base: Leisure travellers less likely to travel to the United States. Summer 2025 (n=1,111)

CTIA4. Why are you less likely to travel to the United States for leisure in 2025?

Note: Responses 3% or higher shown

Reasons for Being Less Likely to Travel to the United States – By Demographics

Messaging aimed at encouraging U.S. travel may need to be tailored by audience. Older Canadians (55+) may require more reassurance on a range of concerns, as they are the most sensitive to political, economic, and safety issues. In contrast, Quebecers express fewer concerns overall.

Reasons	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	1,111	538	573	266	329	516	123	83*	90*	424	308	83*
Canada / U.S. tariffs / trade tensions	64%	63%	65%	57%	61%	69%	68%	60%	66%	66%	60%	61%
Political climate and tensions between Canada and the U.S.	61%	62%	61%	52%	56%	69%	63%	53%	52%	61%	66%	60%
No longer feel safe to travel to the U.S.	47%	44%	50%	41%	43%	53%	51%	43%	43%	53%	37%	54%
Poor exchange rate / weak Canadian dollar	46%	42%	48%	38%	38%	55%	42%	48%	45%	50%	42%	39%
Don't feel welcome in the U.S	44%	46%	43%	34%	45%	48%	43%	42%	40%	47%	43%	37%
Concerns about border delays or complications	40%	39%	41%	29%	38%	48%	53%	37%	37%	46%	25%	41%
Cost of travel (e.g., flights, accommodation, gas) is too high	29%	29%	29%	29%	29%	29%	35%	33%	32%	32%	18%	31%
Prefer to travel within Canada or elsewhere	28%	25%	31%	22%	25%	33%	24%	22%	38%	33%	24%	21%
Travel restrictions or uncertainty about travel rules	26%	26%	26%	20%	17%	35%	33%	26%	34%	29%	14%	25%
Not interested in U.S. destinations	24%	27%	23%	17%	19%	31%	28%	23%	24%	27%	18%	28%
Negative past experiences travelling in the U.S.	6%	6%	5%	5%	6%	6%	6%	6%	1%	9%	2%	6%
Environmental reasons / trying to reduce travel emissions	3%	3%	3%	4%	2%	4%	6%	2%	1%	4%	2%	2%

Base: Leisure travellers less likely to travel to the United States. Summer 2025 (n=1,111)

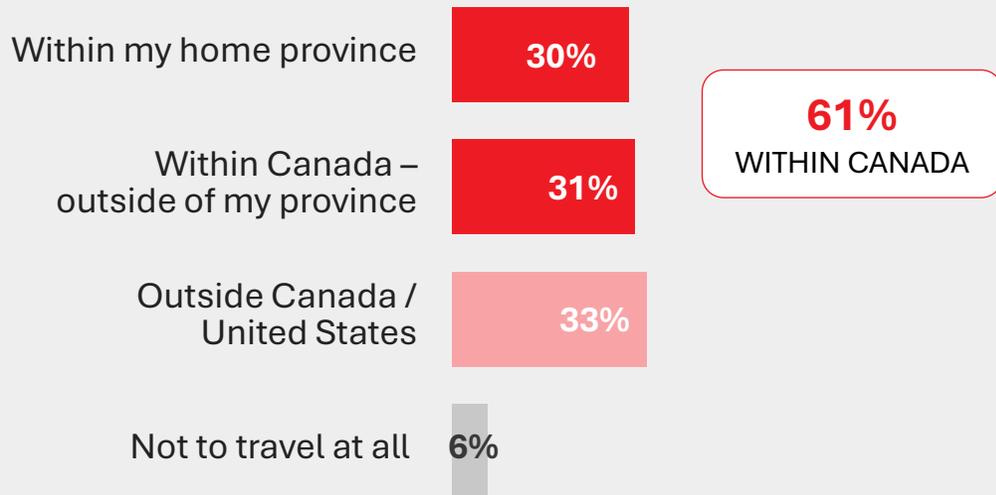
CTIA4. Why are you less likely to travel to the United States for leisure in 2025? *Small base size, interpret with caution

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

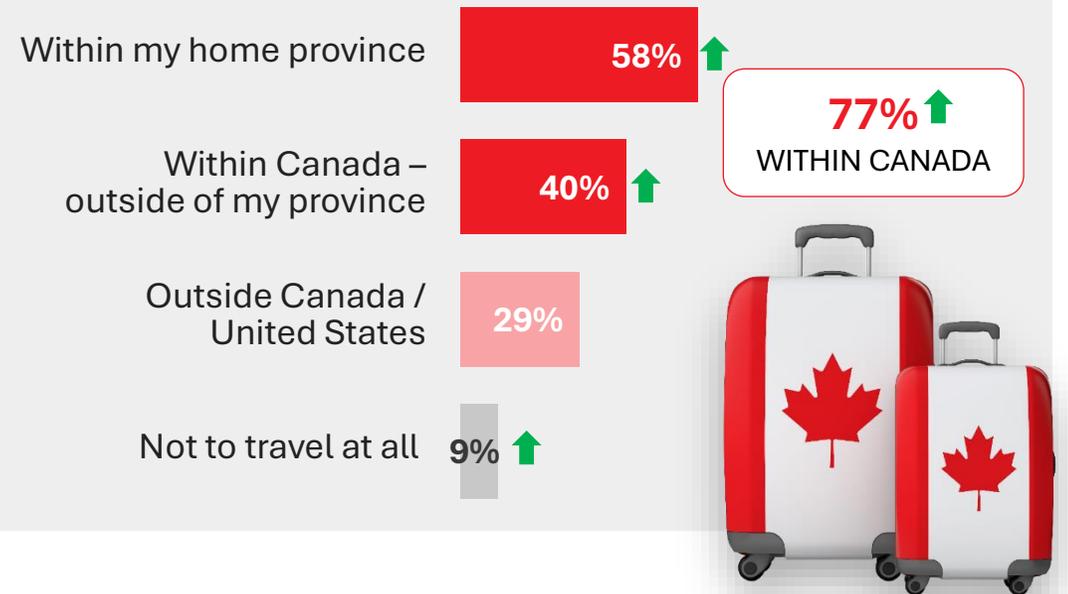
Alternate Travel Destinations for Canadians Less Likely to Travel to the U.S. in 2025

Domestic destinations are benefitting as more Canadians shift away from U.S. travel, presenting an opportunity for Canadian destinations to build loyalty among travellers who might not have considered staying closer to home. Since the tariff announcements, Canadians who are now less likely to travel to the U.S. are increasingly choosing domestic alternatives, particularly within their home province. The proportion opting for travel within Canada has climbed from 61% in February 2025 to 77% currently.

Where going instead of the U.S. BEFORE Tariffs



Where going instead of the U.S. AFTER Tariffs



Base: Leisure travellers less likely to travel to the United States. Spring 2025 (n=747), Summer 2025 (n=1,111) CTIA5. Where, if at all, are you more likely to travel instead?

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

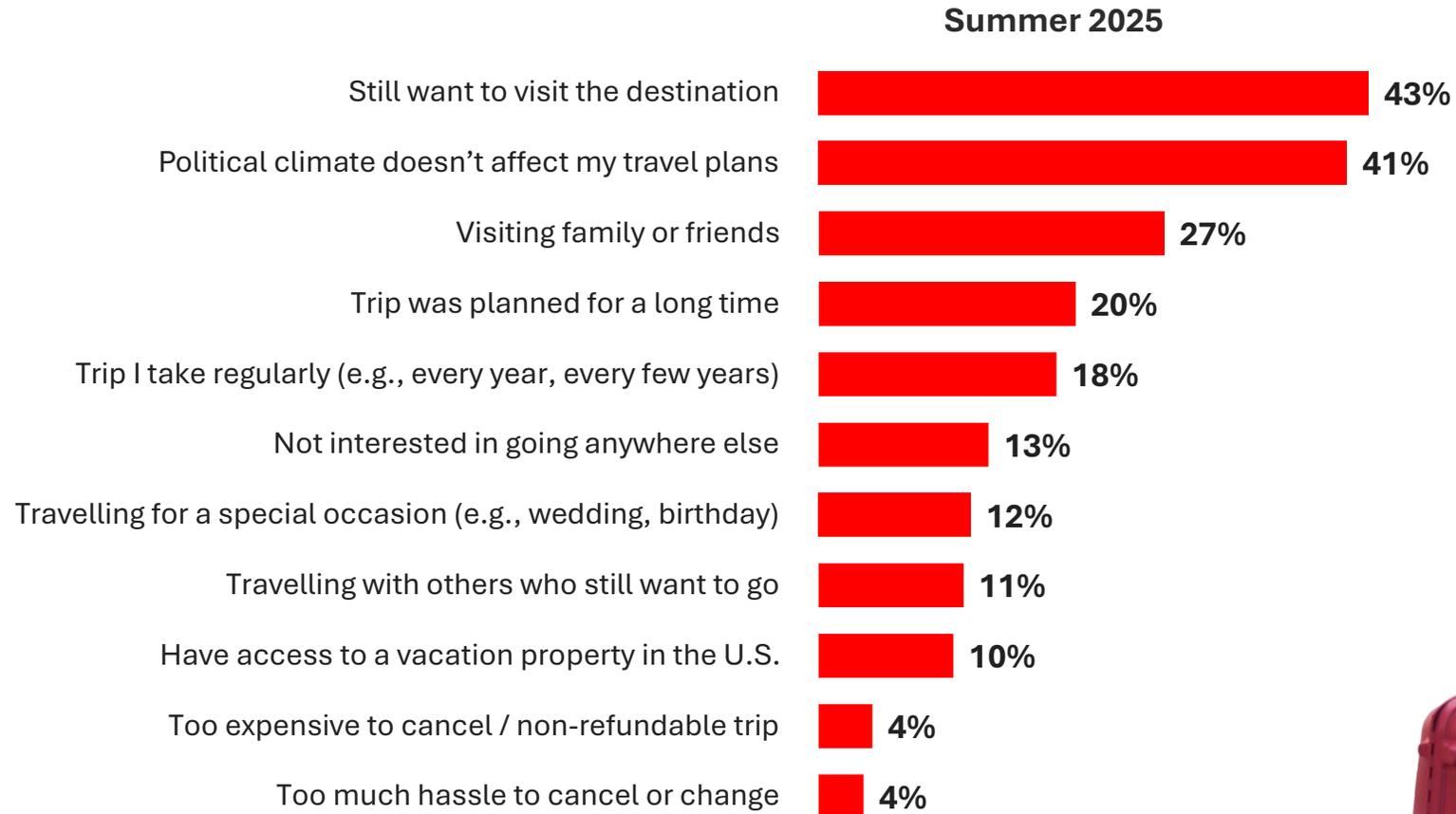
Alternate Travel Destinations for Canadians Less Likely to Travel to the U.S. in 2025 – By Demographics

Younger Canadians who are less likely to travel to the U.S. are playing a key role in the shift toward domestic travel, with those aged 18 to 54 especially likely to substitute U.S. trips with domestic ones. Regional trends are also emerging: Ontario and Quebec residents favour in-province travel, while British Columbians show a stronger interest in international destinations.

	Total	Male	Female	18-34	35-54	55+	BC	AB	MB/SK	ON	QC	Atlantic
n=	1,111	538	573	266	329	516	123	83	90	424	308	83
NET: Canada	77%	78%	76%	78%	84%	71%	70%	79%	75%	79%	75%	82%
Within my home province	58%	59%	56%	54%	63%	55%	52%	58%	44%	58%	64%	53%
Within Canada – outside of my province	40%	40%	40%	50%	46%	31%	33%	51%	54%	43%	29%	49%
Outside Canada / United States	29%	27%	30%	34%	26%	28%	33%	32%	18%	31%	28%	16%
Not to travel at all	9%	9%	9%	7%	6%	12%	9%	9%	19%	6%	10%	13%

Reasons for Still Planning to Travel to the United States

Despite political tensions, a segment of Canadians remains committed to U.S. travel, driven by a strong desire to visit, longstanding plans, and personal connections. Among those still planning U.S. trips, the top motivations are a strong interest in the destination and indifference to the political climate – each cited by over four-in-ten. Visiting family or friends is also a key factor, mentioned by just over a quarter.

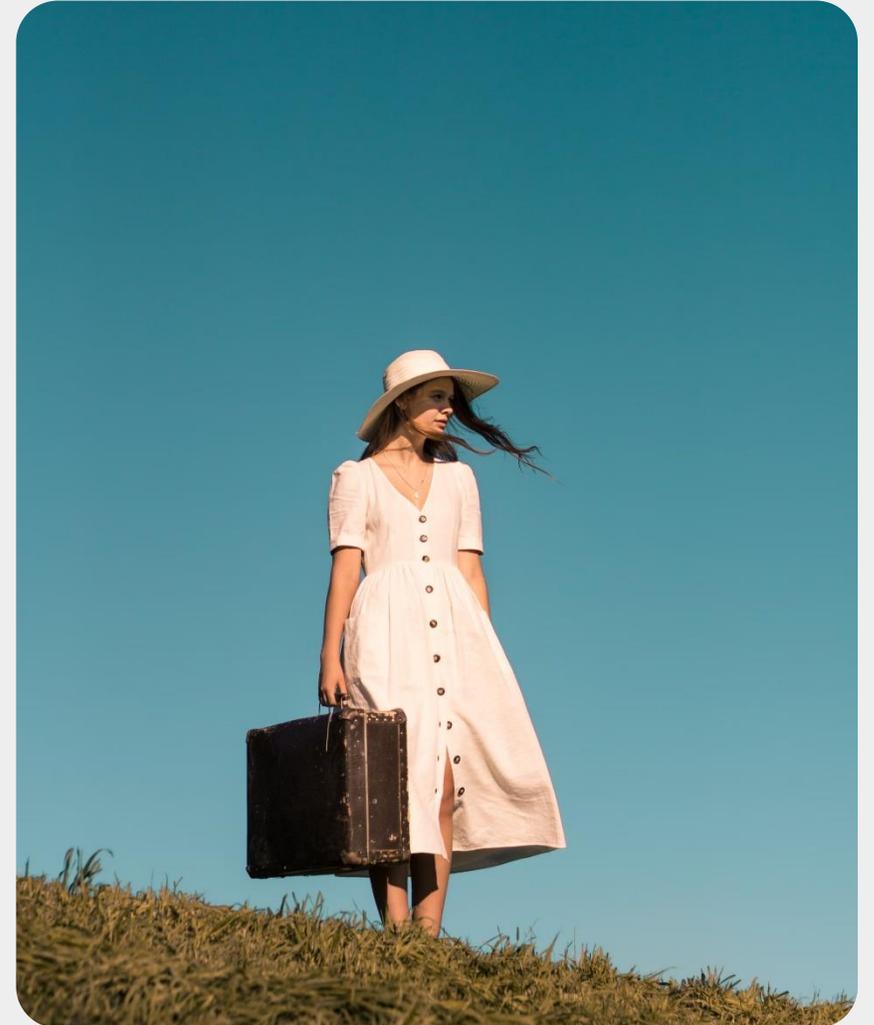


Base: Leisure travellers still planning to travel to the United States. Summer 2025 (n=119). Note: sample sizes too small to report results by demographics. CTIA6. Why do you still plan to travel to the U.S. for leisure this year?

Note: Responses 3% or higher shown

3

Respondent Profile



Weighted and Unweighted Sample

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

Summer 2025

	Weighted	Unweighted
Region	1,537	1,537
British Columbia	214	161
Alberta	171	133
Saskatchewan/Manitoba	99	125
Ontario	595	604
Quebec	355	412
Atlantic	103	102
Area		
Urban	614	652
Suburban	606	590
Rural	306	285

Summer 2025

	Weighted	Unweighted
Gender	1,537	1,537
Male	749	801
Female	788	736
Age		
18-34	410	424
35-54	495	475
55+	632	638

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

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