



THE ROAD AHEAD

# Canadian Travel Sentiment Study

WAVE 4

FEB 18, 2026

Longwoods  
INTERNATIONAL

# Key Highlights



- **Recent Travel Activity: Only 1 in 4 Traveled; Almost 1 in 4 Canceled**  
In the past six months, 26% of Canadian travelers visited the U.S., while 23% canceled a previously planned trip. Looking ahead, 56% do not intend to visit in the next year
- **U.S. Policies and Politics Discourage Visits**  
59% of Canadian travelers report U.S. government policies, trade practices, or political statements make them less likely to travel to the U.S.—up from 53% in October.
- **Domestic Substitution Is Top Alternative**  
45% of Canadian travelers now say they would substitute a planned U.S. trip with a domestic trip—up from 37% in October. 24% are shifting to international destinations. Trip cancellations stand at 11%—down from 23% in April.
- **Europe Most Frequently Mentioned as International Alternative**  
Among those replacing the U.S. with international travel, Europe remains the top alternative, followed by Mexico and the Caribbean.
- **High Agreement on U.S. Attractions; Lower Agreement on Safety**  
While 88% say the U.S. offers "Lots of things to see and do"—up from 84% in April—only 35% agree it is "A Safe Place to Visit," down from 43% in April. Just 46% agree the U.S. is "Welcoming of Canadians."

# Recent U.S. Travel Activity: Only 1 in 4 Canadian Travelers Traveled; Almost 1 in 4 Cancelled

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

No, I did not travel to the U.S. and did not intend to travel to the U.S.

51%

No, I intended to travel to the U.S., but I canceled my plans

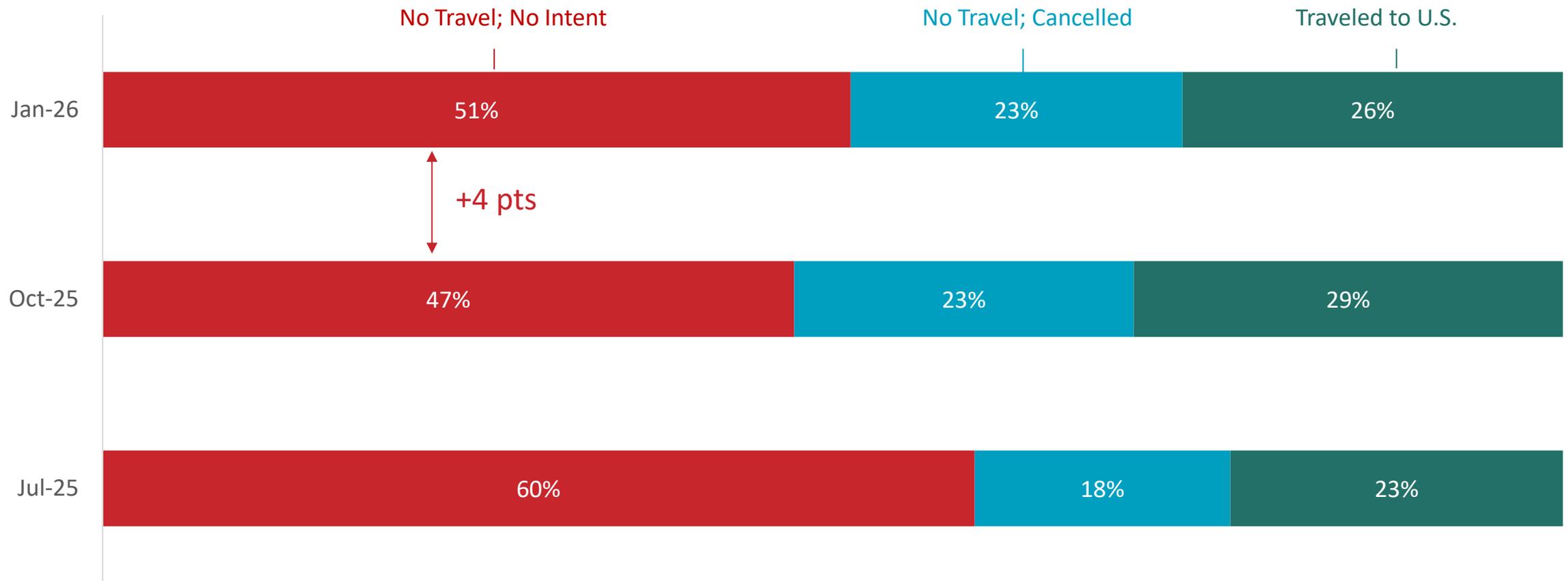
23%

Yes, I traveled to the U.S.

26%

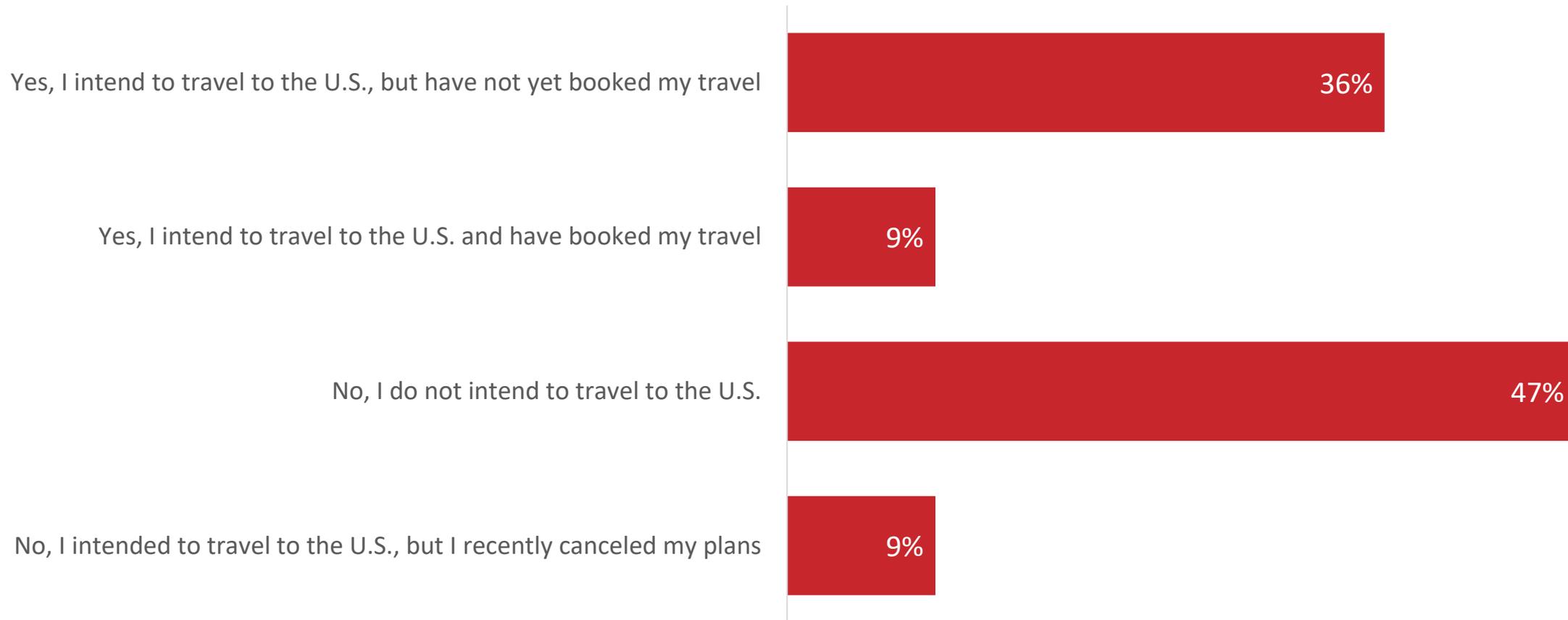
# U.S. Non-Travel Up Since October, Still Below July

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



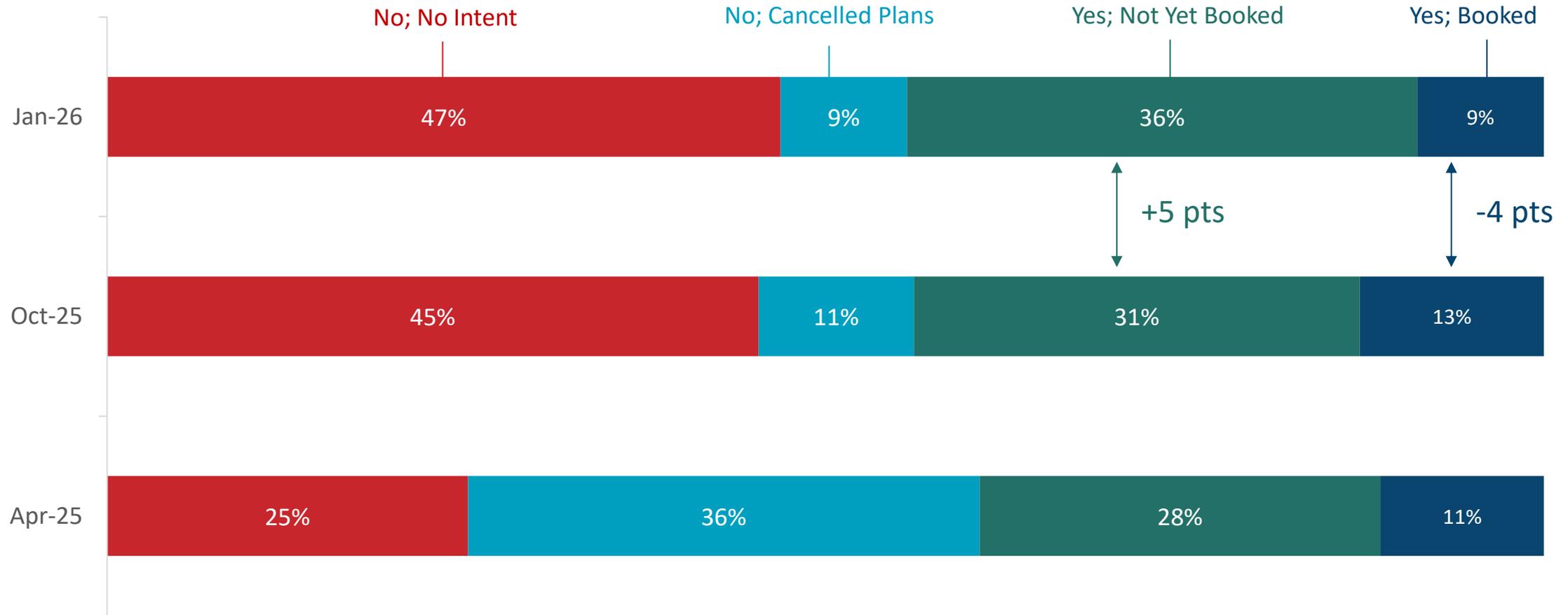
# 45% of Canadian Travelers Intend to Travel to the U.S. in Next 12 Months

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



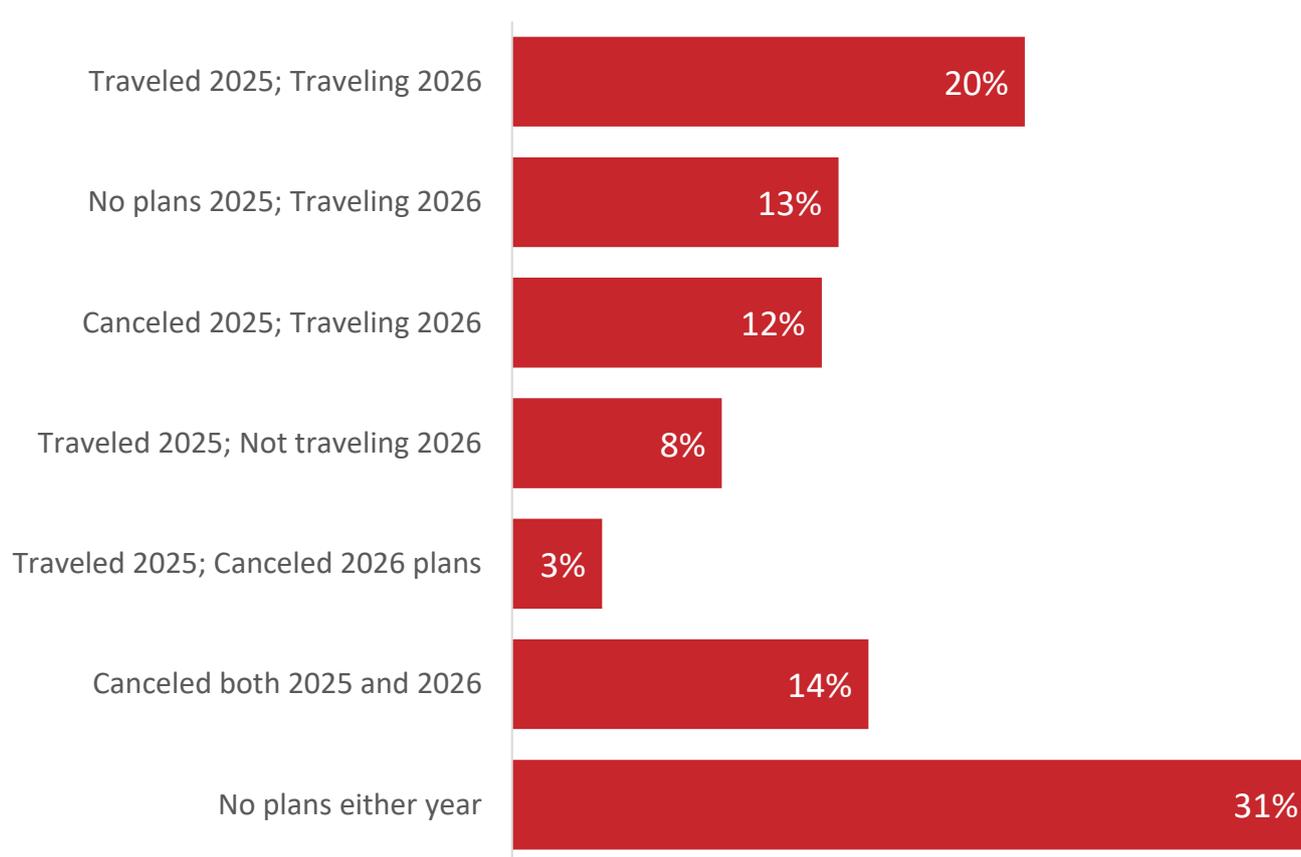
# Intent Up, Bookings Down: Gap Widens Between Plans and Reservations

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



# Nearly Half of Canadian Travelers Plan U.S. Trips in 2026

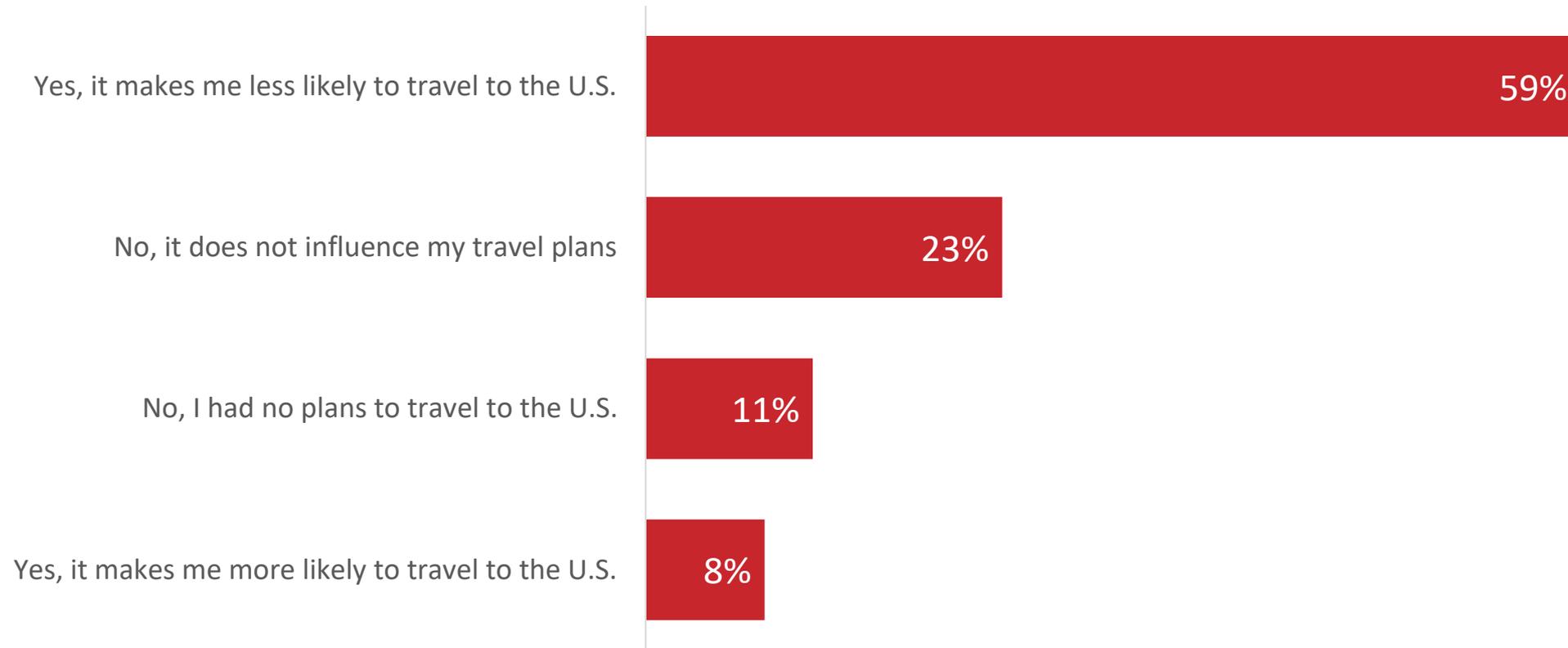
How do your travel plans to the U.S. in 2026 compare to your travel to the U.S. in 2025?



**45% of Canadian travelers** plan to visit the U.S. in 2026.

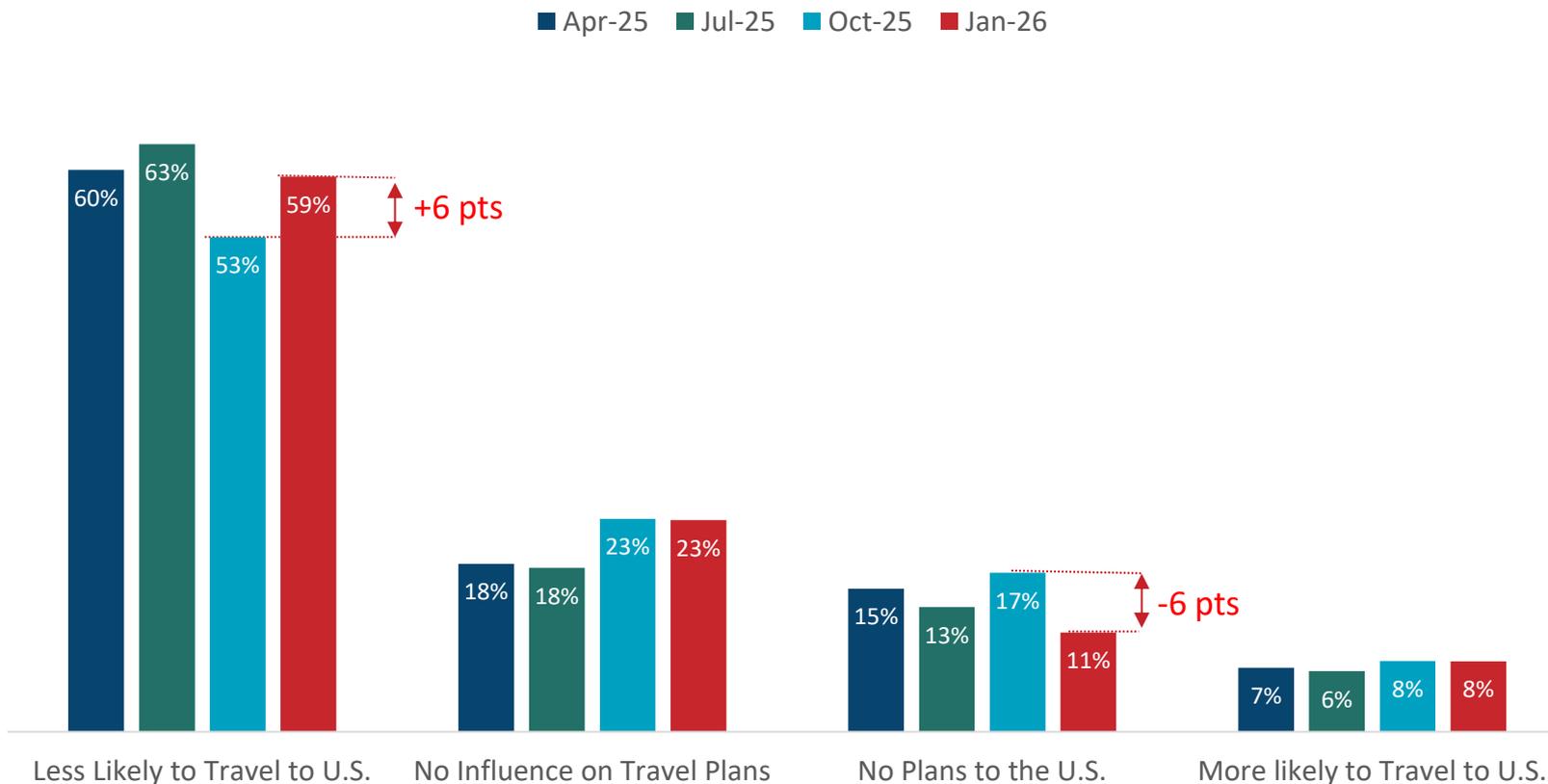
# U.S. Policies and Politics Continue to Deter Canadian Travelers

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?



# Policy Deterrence Hardening Among Canadian Travelers

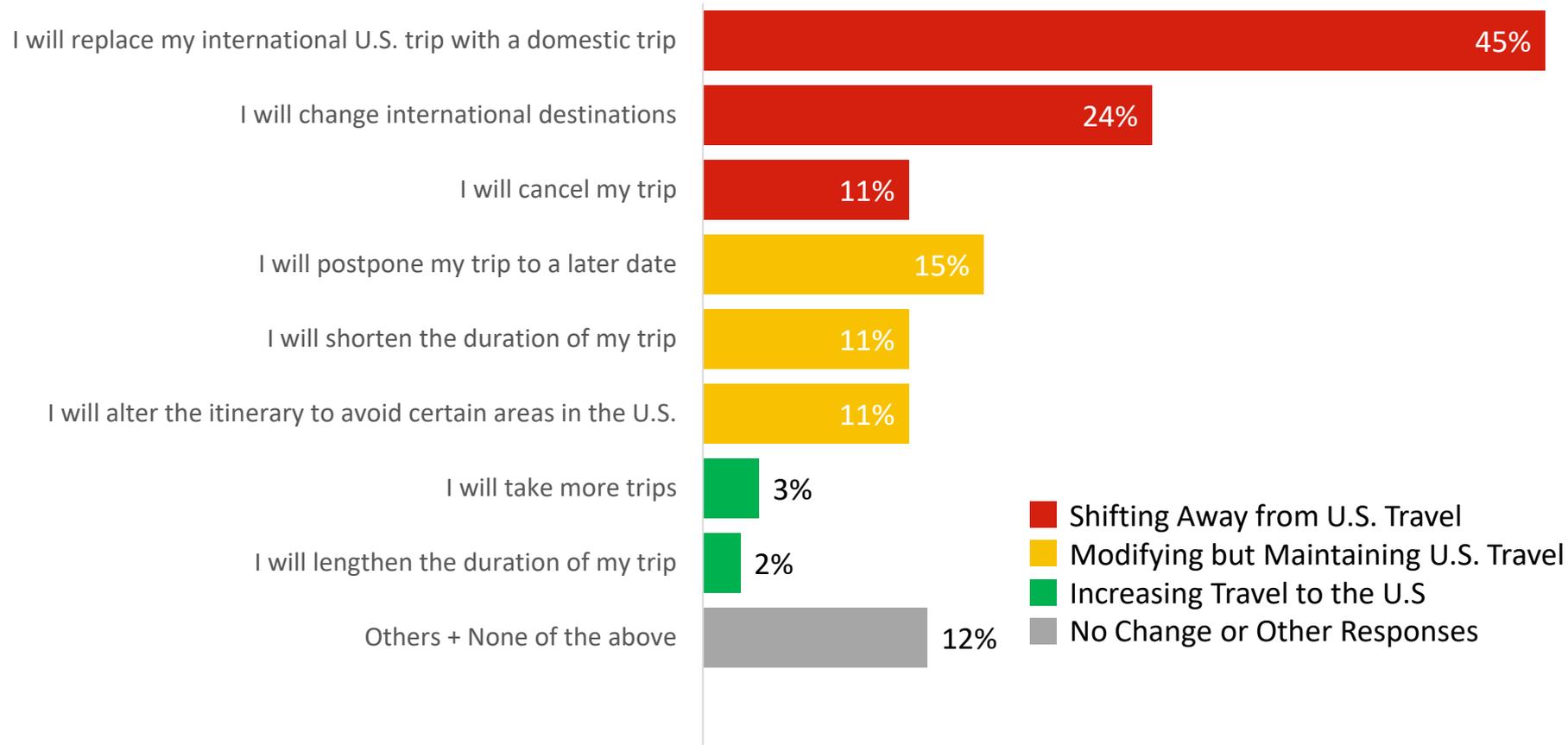
Are current U.S. Government policies, trade practices, and/or political statements influencing you to change your travel plans to the U.S. in the next 12 months?



In the most recent January 2026 study, **59% of Canadian travelers** say U.S. government policies make them **LESS LIKELY** to travel to the U.S.— up from **53%** in October (a 6-point increase).

# Canadian Travel Adaptations: Domestic Substitution Remains Top Alternative

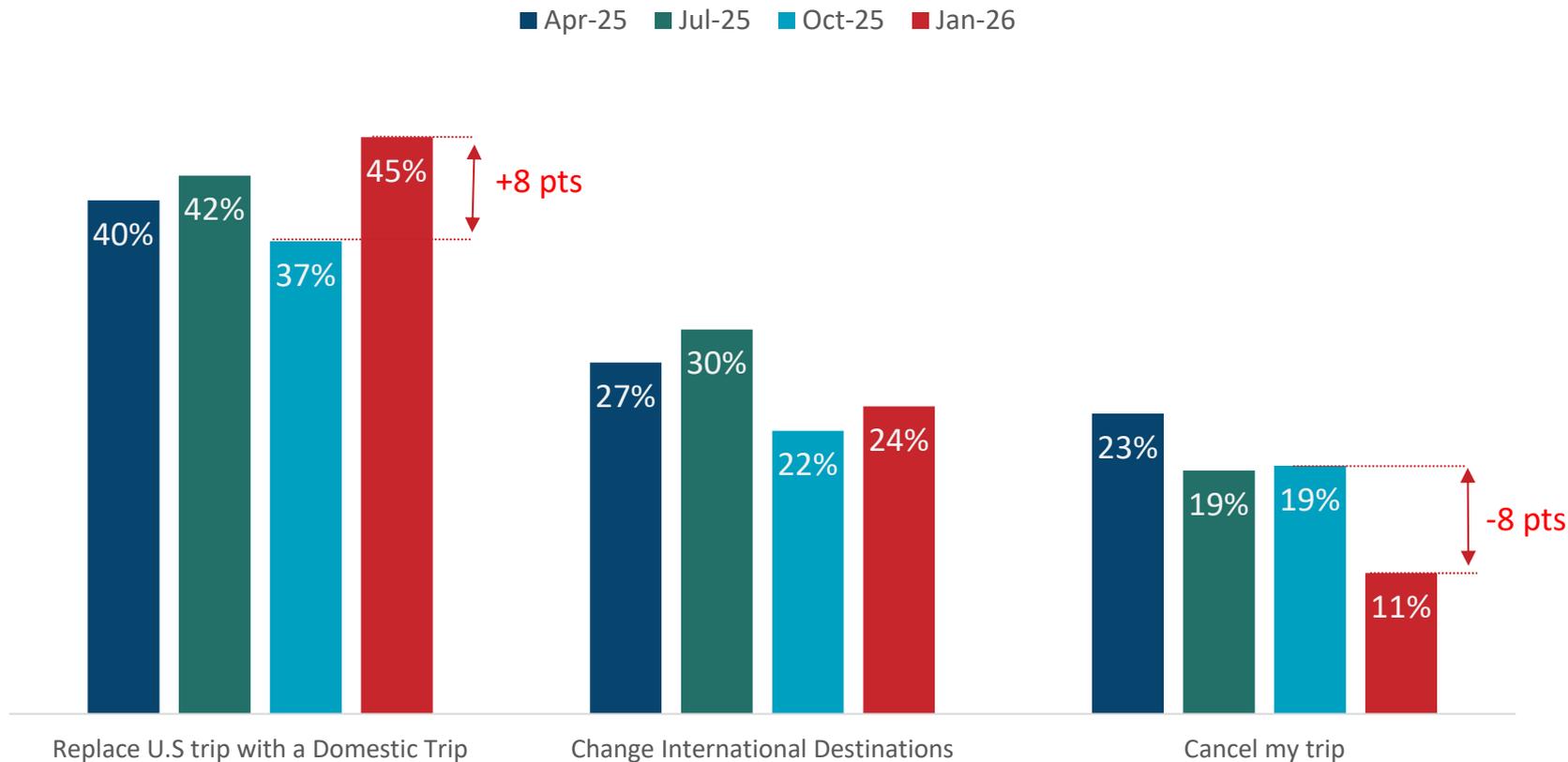
You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



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

# U.S. Policy Concerns Prompt Shift to Domestic Alternatives

**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?



**45% of Canadian Travelers will replace** U.S. trips with domestic trips—up from 37% in October and the highest since April. **24% will change** to international destinations. **11% will cancel** trips—down from 19% in October.

# Alternative International Destinations: Europe, 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.

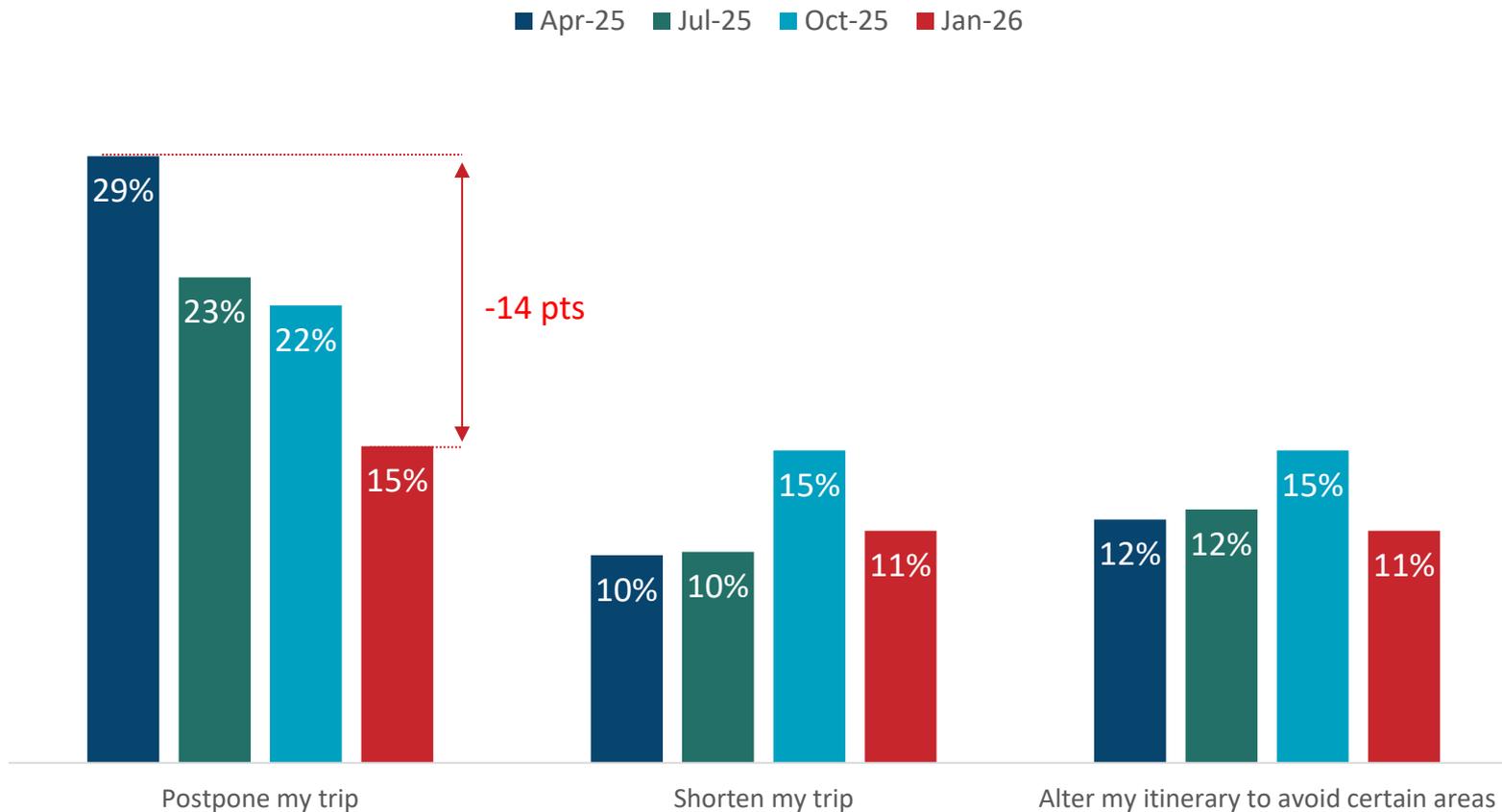


- **Europe was the most frequently** mentioned alternative international destination to U.S.
- **Mexico and the Caribbean** were also commonly mentioned as alternatives.
- Additional destination preferences include **Asian** countries.

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.

# Trip Postponement Declines Among Policy-Concerned Travelers

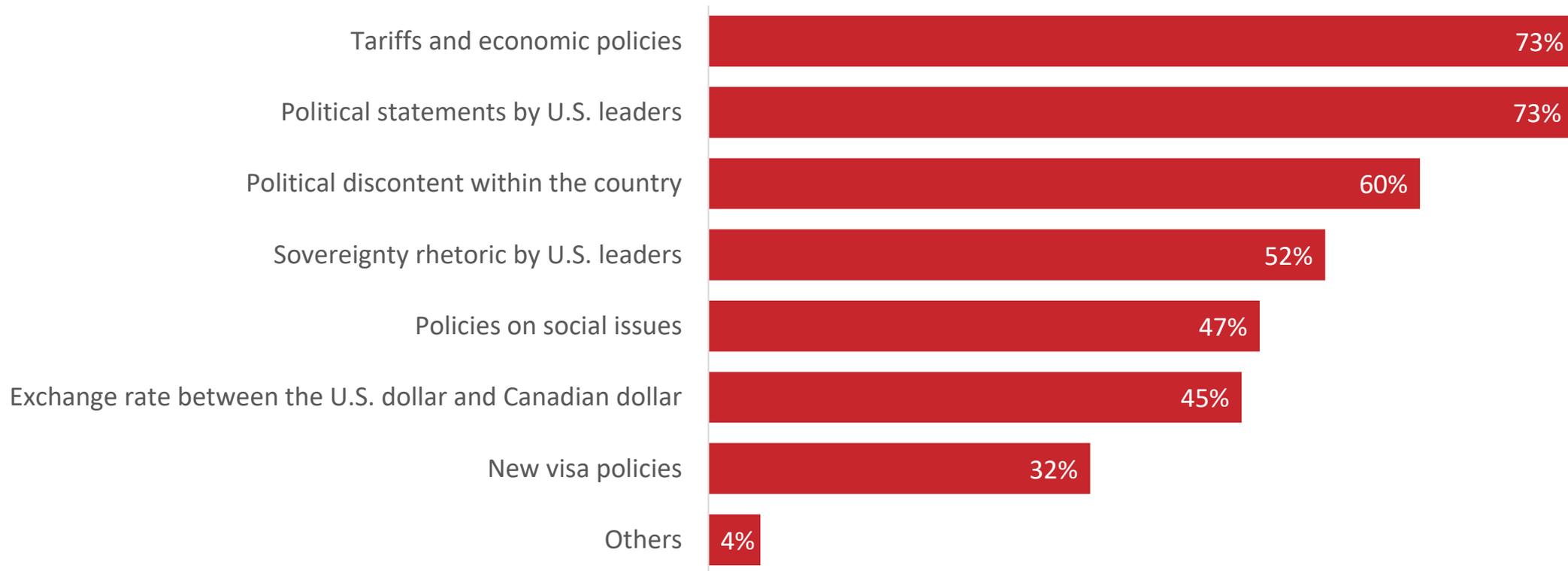
**For respondents modifying but maintaining U.S. Travel:** You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



Among policy-concerned travelers, **trip postponement declined from 29%** in April 2025 to **22%** in October 2025 to **15%** in January 2026, a 14-percentage-point decrease since April.

# Tariffs and U.S. Politics Shape Canadian Travel Plans

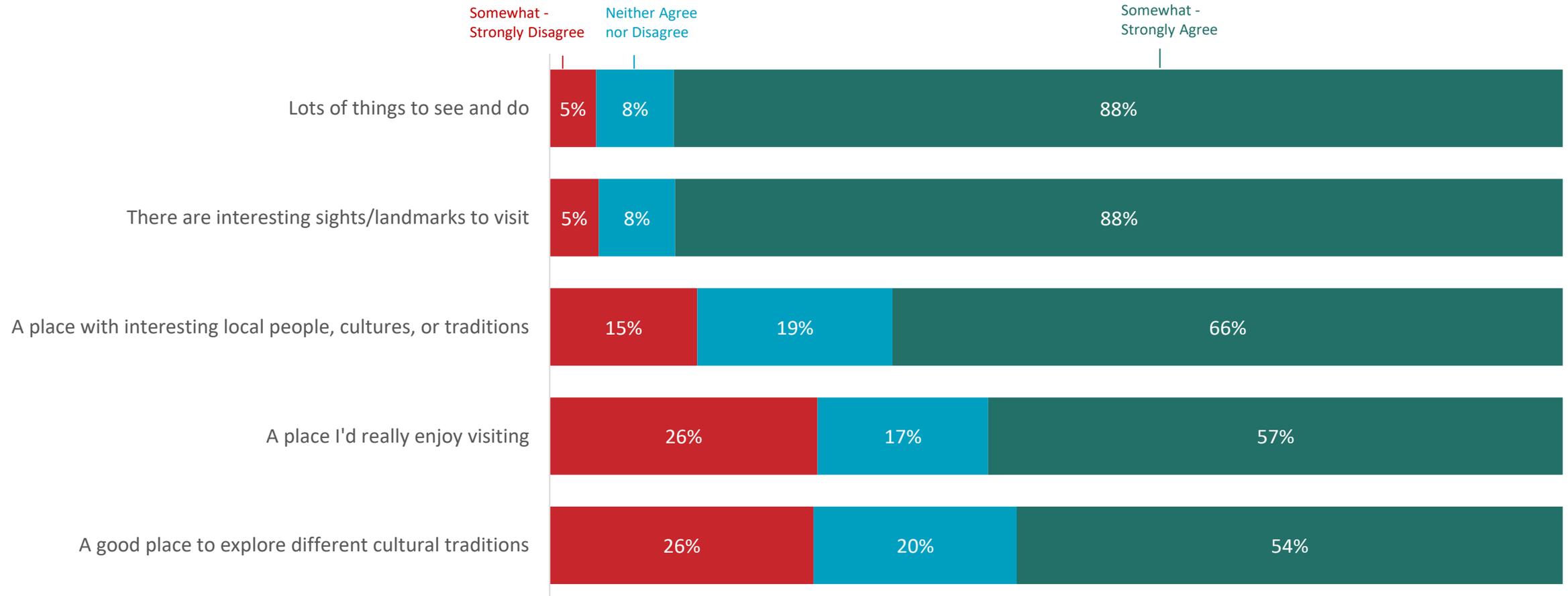
You indicated that you will change your travel plans to the U.S. in the next 12 months. Which of the following U.S. government policies, trade practices, and/or political statements caused you to change your travel plans?



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

# U.S. Widely Perceived by Canadian Travelers as Rich in Attractions and Experiences

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



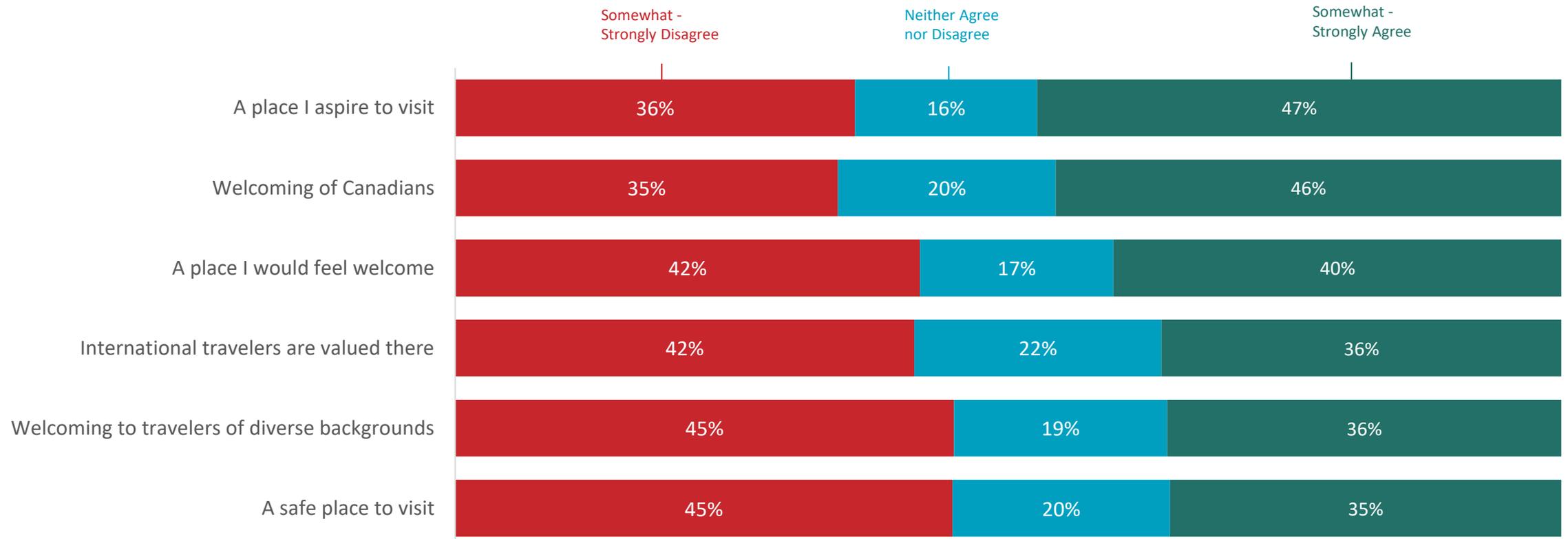
# Canadian Recognition of U.S. Attractions Peaks at 88%

**88% of Canadian travelers** agree that the U.S. has "Lots of things to see and do"—**a 4-point increase** since April 2025.

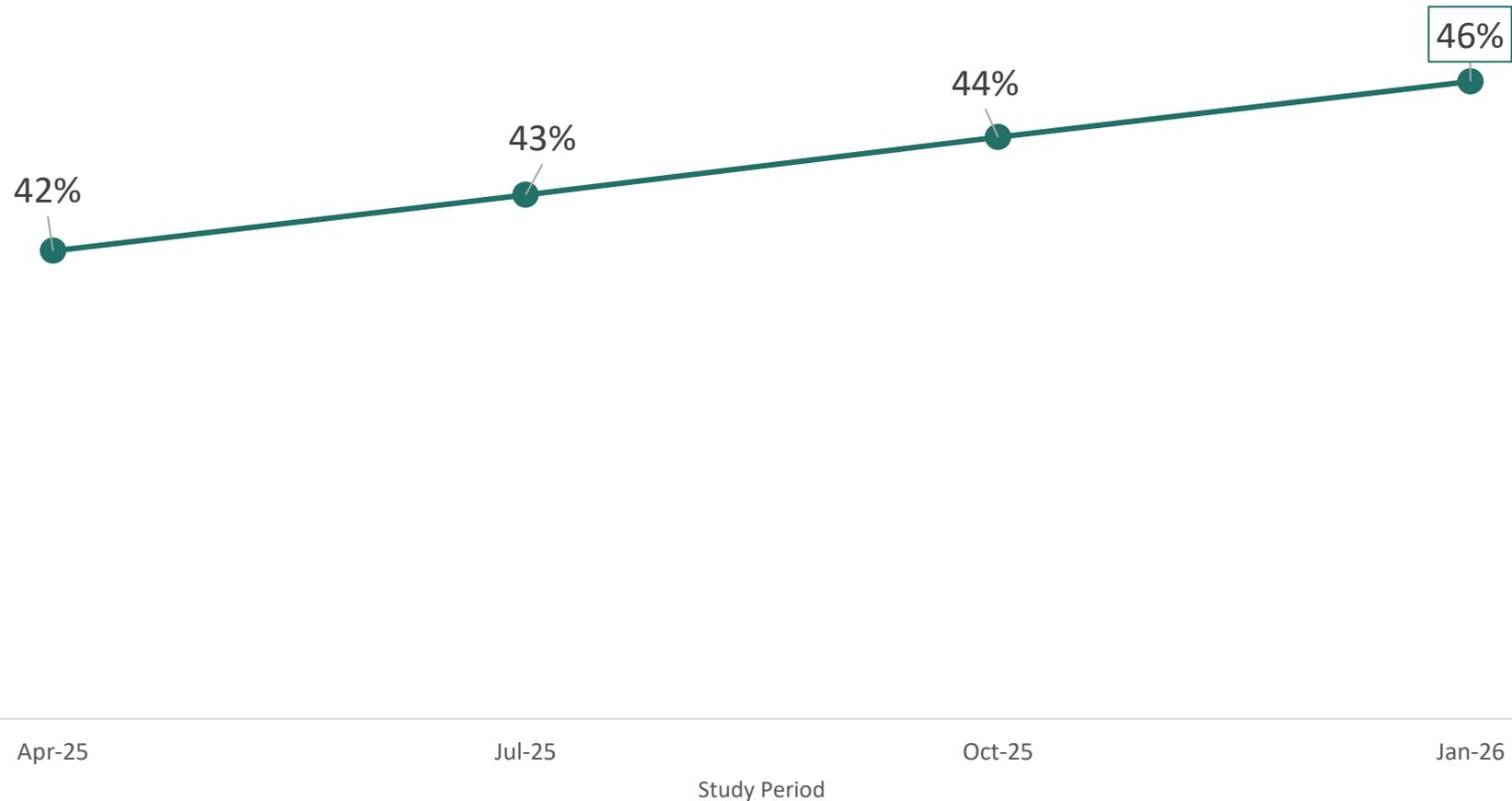


# Perceptions of U.S. as Welcoming, Safe, and Valuing International Travelers Remain Low

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



# % of Canadians Agreeing with the U.S. perception: "Welcoming of Canadians"



Only **46%** of Canadian travelers agree the U.S. is "Welcoming of Canadians"—holding steady since October.

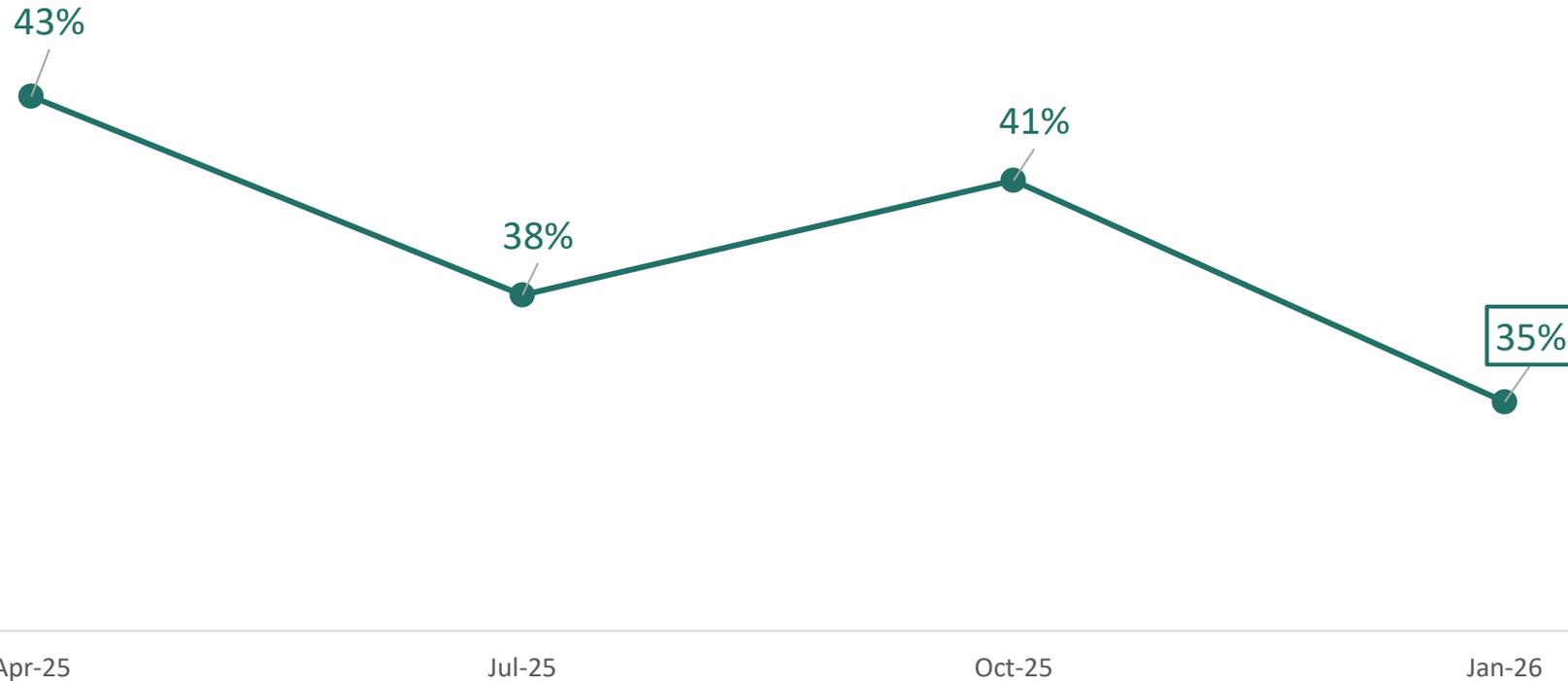
# Canadian Travelers' Confidence in U.S. Safety Reaches Lowest Levels

## % of Canadians Agreeing with the U.S. perception: "A safe place to visit"



# Canadian Travelers' Confidence in U.S. Safety Reaches Lowest Levels

% of Canadians Agreeing with the U.S. perception: "A safe place to visit"



Only **35% of Canadian travelers** feel the U.S. is "A safe place to visit"—an **8-point decline** since April 2025.



## Canadian Travel Sentiment Study

# Methodology

### Key Details:

- Survey Date: Jan 8-10, 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](http://www.longwoods-intl.com/travel-sentiment)

Miles Partnership Research and Insights  
[www.MilesPartnership.com/How-We-Think](http://www.MilesPartnership.com/How-We-Think)

*This study is supported by Miles Partnership.*

# Thank You!