

# 2025 GLOBAL TRAVELLER RESEARCH PROGRAM

## UNITED STATES HIGHLIGHTS REPORT



Canada



Emerald Lake Alberta



CANADIAN TOURISM DATA  
COLLECTIVE

# TABLE OF CONTENTS

---

**03**

Study Overview: US  
Market

---

**14**

Indigenous Travel

---

**04**

Key Insights

---

**18**

Travel Behaviours

---

**05**

Market Sizing

---

**23**

Most Recent Trip to  
Canada

---

**10**

Considering Canada as  
a Travel Destination

---



# STUDY OVERVIEW: UNITED STATES MARKET



The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in English, with sample being sourced from a nationally established panel.


The target population are residents aged 18 years and older who have taken an out of state vacation trip, where they had stayed at least 1 night with a minimum of 1 night in paid accommodations in the past 3 years, or plan to take such a trip in the next 2 years.

HEG Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.




**Timing of Fieldwork**

**November 24<sup>th</sup> –  
December 3<sup>rd</sup>, 2025**



**Geographical Definition  
for Qualified Trips**

**Outside of: your state**



**Sample Distribution**

<b>Sample distribution:</b>	<b>National</b>
<b>Highly Engaged Guest (HEG) Audience:</b>	<b>2233</b>
<b>Other travellers:</b>	<b>1356</b>
<b>Total sample size:</b>	<b>3589</b>

In 2023, Destination Canada switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.



Consideration for Canada continues to be strong among US travellers, with the next 2-year immediate potential for Canada being 49M. The current geopolitical climate has also aided in Canada's popularity among US travellers, with 28% stating that they are more likely to visit Canada as a result.



Potential visitors to Canada are more likely to consider a visit during the summer months, followed by fall and spring, with Ontario accounting for the highest number of potential visitors.



US travellers are most likely to base an entire trip around natural attractions, oceanside beaches, and historical or heritage sites, while also being interested in trying local cuisine, and going on nature walks.



While domestic destinations are stronger, Canada is the highest among international competitors for unaided mentions of Indigenous tourism destinations. US travellers seek safety and comfort in experiences that are authentic.



While the use of AI is common (and usage has increased among older travellers), travel agents continue to be used for booking flights and accommodations, as well as researching accommodations.

# MARKET SIZING



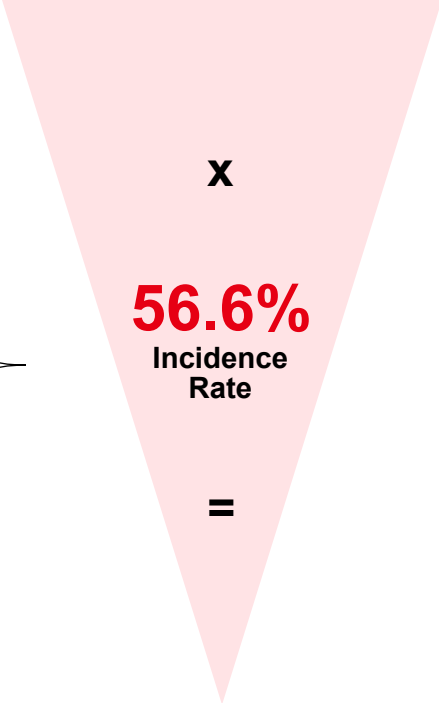
Killarney Provincial Park  
Ontario



# MARKET SIZING – OUT-OF-STATE TRAVELLERS

**Total United States Population 18+ 266,752,500**

64% Passport Ownership	170,721,500
59% Took an Out-of-State Pleasure Trip in the Past 3 Years (Recent Out-of-State Travellers)	157,384,000
54% Plan To Take an Out-of-State Pleasure Trip In Next 2 Years (Upcoming Out-of-State Travellers)	144,046,500



**Total potential out-of-state pleasure travellers (past 3 years/planned next 2 years) and current passport holders/intenders 150,982,000**

Note: Results are from 2023 YouGov Canada Omnibus Survey  
 Base: General population aged 18+ (n=1150)

# POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)

Total potential **Out-of-State Pleasure** travellers aged 18 years or more

**150,982,000**

X

**Target Market for Canada**  
*(Those in the dream to purchase stages of the path to purchase for Canada)*

**73.3%**

=

Size of the Target Market

**110,700,000**

X

**Immediate Potential for Canada**  
*(Will definitely/very likely visit Canada in the next 2 years<sup>1</sup>)*

**44.9%**

=

Immediate Potential

**49,704,500**

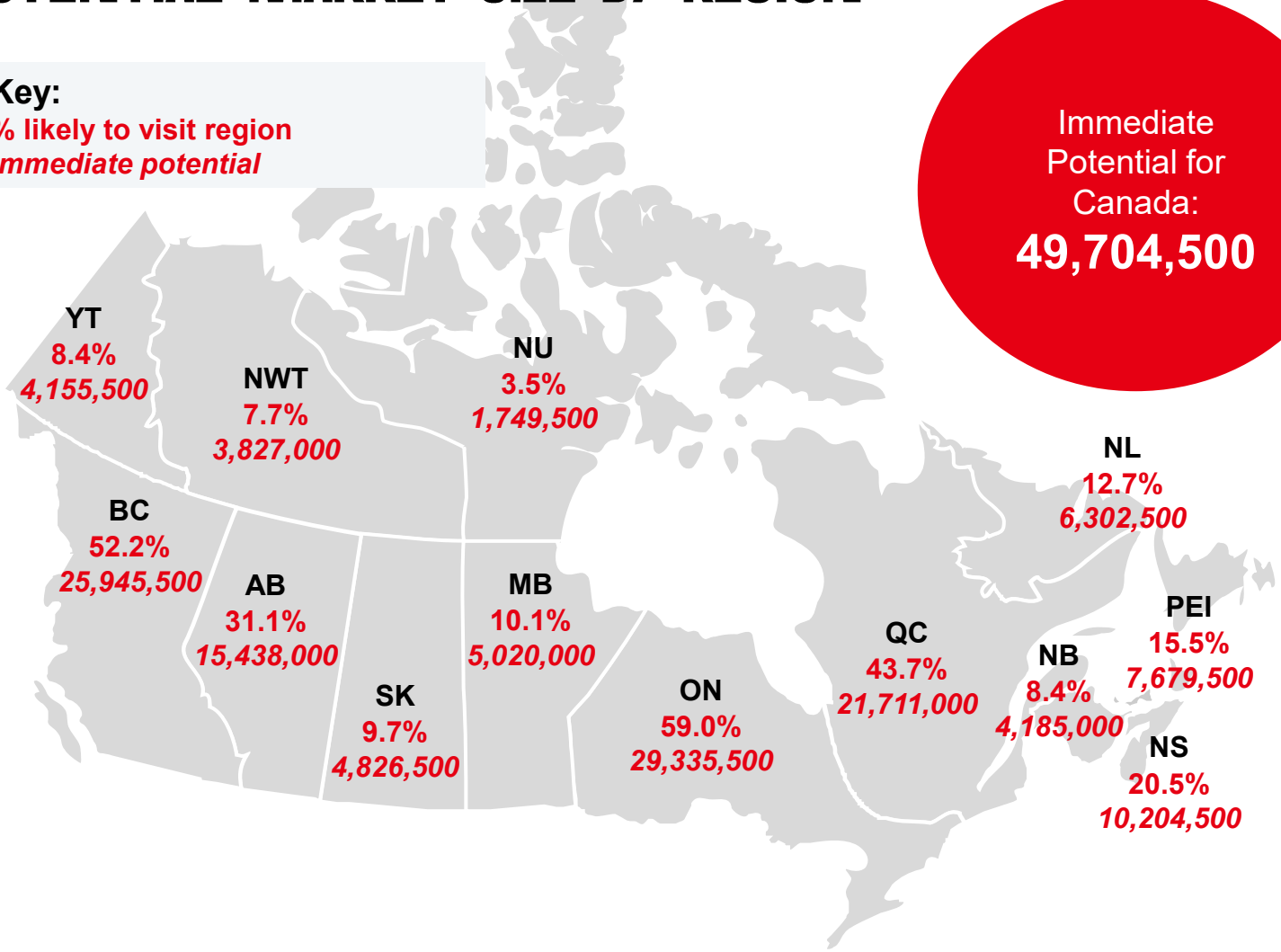
<sup>1</sup> Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.  
Base: Target market for Canada = out-of-state pleasure travellers (past 3 years or next 2 years) (n=3589); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=2602)  
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)  
E1. Realistically, how likely are you to take a vacation trip to Canada in the **next 2 years**? (Select one)

# POTENTIAL MARKET SIZE BY REGION

Ontario has the highest potential to draw in over 29.3 million US travellers over the next two years.

Immediate Potential for Canada:  
**49,704,500**

**Key:**  
% likely to visit region  
*Immediate potential*



Nunavut


Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=2602)  
E2. If you were to take a vacation trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)

# TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	7%	19%	29%	19%
Alberta	5%	11%	16%	10%
Saskatchewan	2%	5%	4%	3%
Manitoba	2%	4%	5%	4%
Ontario	8%	22%	32%	21%
Quebec	7%	16%	24%	16%
New Brunswick	1%	3%	4%	3%
Nova Scotia	2%	7%	12%	9%
Prince Edward Island	2%	5%	9%	6%
Newfoundland & Labrador	1%	5%	8%	6%
Yukon	2%	3%	5%	3%
Northwest Territories	2%	2%	4%	2%
Nunavut	1%	1%	2%	1%



**US travellers show the strongest interest in summer months, while fall and spring are also popular.**



Whitehorse  
Yukon

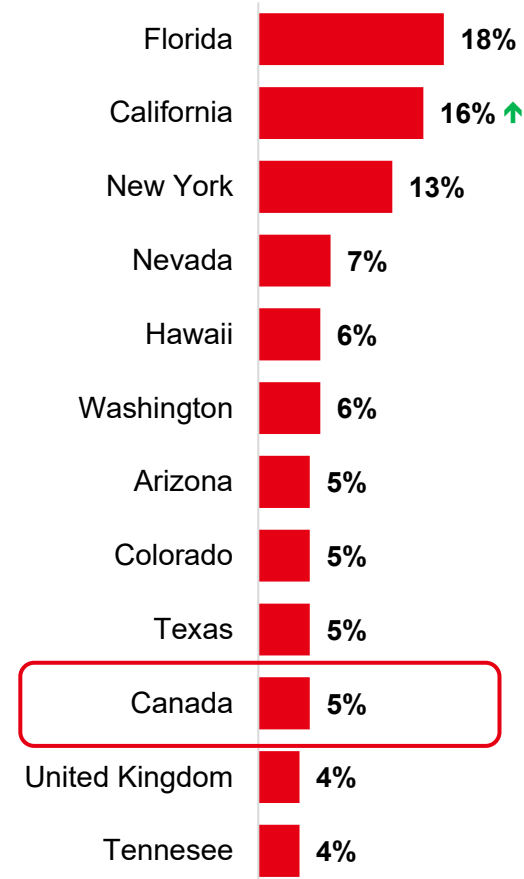
United States GTRP –  
December 2025

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=2602) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

# CONSIDERING CANADA AS A TRAVEL DESTINATION

# UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)<sup>1</sup>

On an unaided basis, Canada ranks tenth overall among US travellers, but leads as the top destination for travel beyond the US. Notably, scores for California have increased compared to 2024.

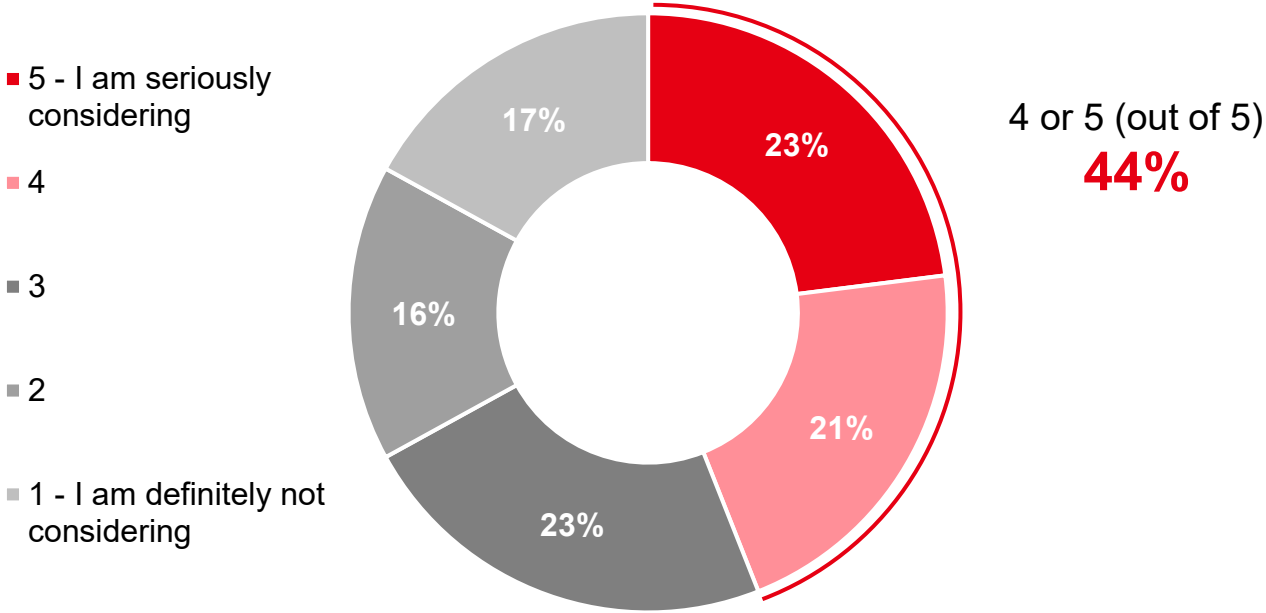


<sup>1</sup> Roll-up of brand mentions by country (e.g., percentage who said “Canada” or any destination in Canada).  
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=3589)  
B1. You mentioned that you are likely to take out-of-state vacation in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)



# AIDED CONSIDERATION FOR CANADA (NEXT 2 YEARS)



**Over four in ten US travellers are considering travelling to Canada in the next 2 years.**



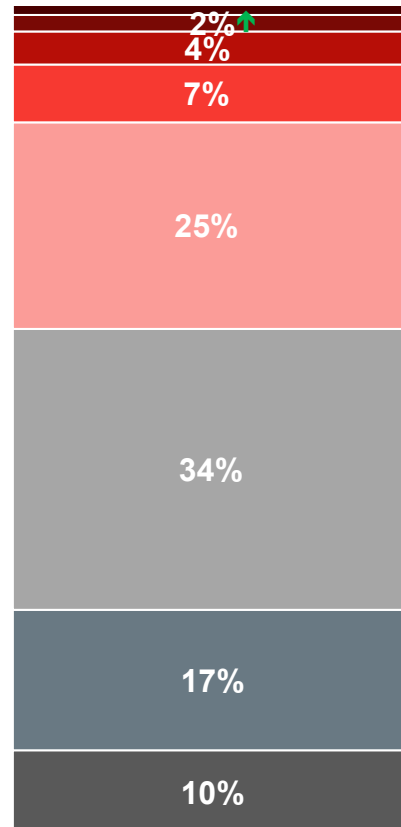
United States GTRP – December 2025

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=3589)  
 C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years?  
 Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

# STAGE IN THE PURCHASE CYCLE FOR CANADA

- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



Actively Planning trip to Canada **14%**

Over one in ten US travellers are actively planning a trip to Canada, on par with 2024.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.  
Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Evaluated Canada (n=3589)  
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a vacation trip? (Select one for each)

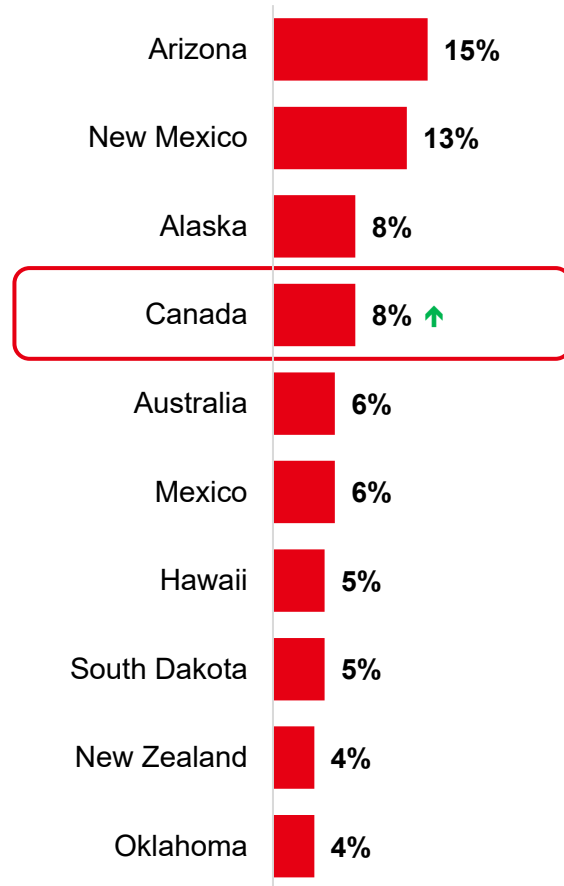
# INDIGENOUS TRAVEL



Carcross  
Yukon



# UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=3589)

B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism**? (Please list up to 3 destinations. You can mention destinations within or outside of your state.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a vacation trip.

**While domestic destinations are stronger, Canada is the highest among international competitors for unaided mentions of Indigenous tourism destinations, increasing significantly compared to 2024.**



# INTEREST IN CANADA AS AN INDIGENOUS DESTINATION

Over one half of US travellers are interested in participating in Indigenous experiences in Canada, with one in ten very interested.

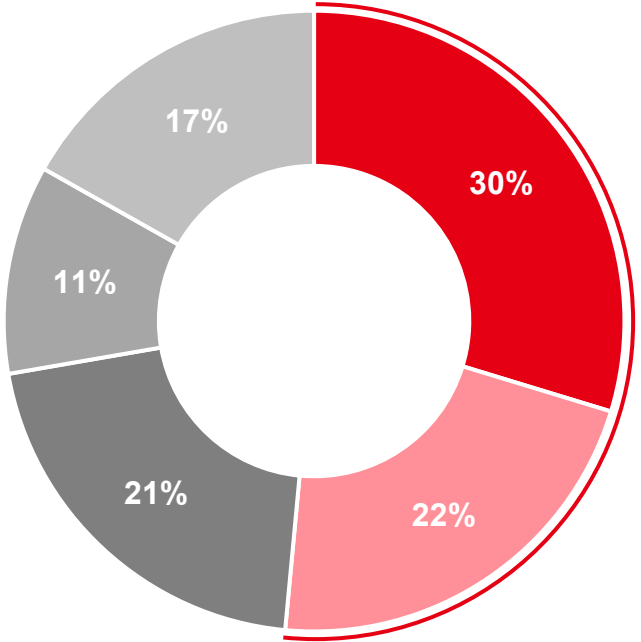
■ 5 - Very interested

■ 4

■ 3

■ 2

■ 1 - Not at all interested



4 or 5 (out of 5)  
**52%**

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)  
 Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=1822)  
 C10. As you may or may not know, Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?



# FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES

Safety and comfort, followed by authenticity, are the primary drivers of interest in Indigenous cultural experiences, though mentions across many factors have declined year over year.



\*\*New statement added in 2025  
 Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)  
 Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=1768)  
 C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)



Victoria  
 British Columbia

# TRAVEL BEHAVIOURS

FARINE  
FIVE ROSES



Montreal  
Quebec



# TOP 10 TRIP ANCHORS ACTIVITIES

**32%**

Natural Attractions

**18%**

Nature Parks

**28%**

Oceanside Beaches

**18%**

Nature Walks

**26%**

Historical, Archaeological, or World Heritage Sites

**17%**

Art Galleries or Museums

**22%**

Trying Local Food and Drink

**16%**

Food and Drink Festivals or Events

**20%**

Northern Lights

**16%**

Viewing Wildlife or Marine Life

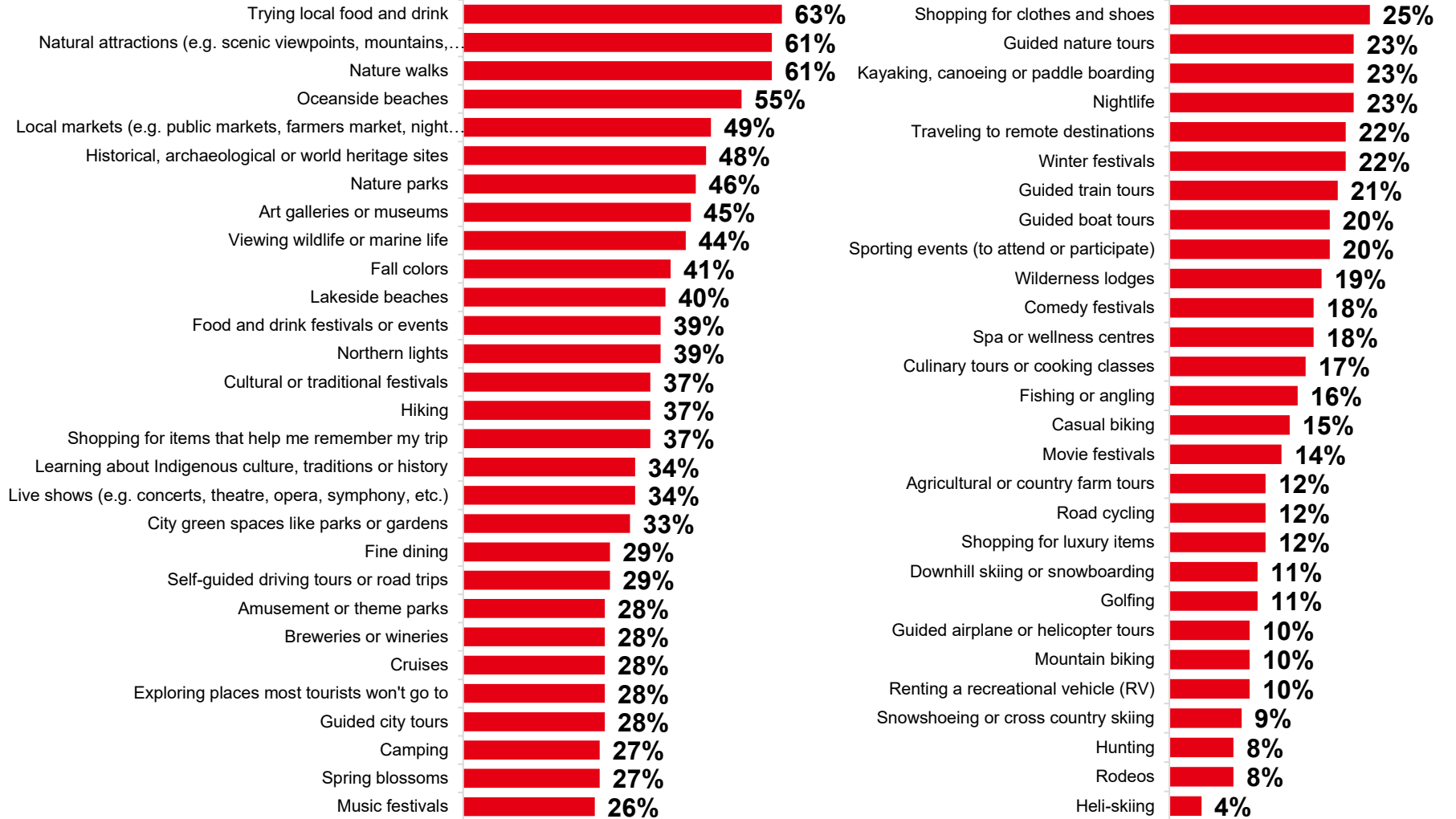


**US travellers are most likely to base an entire vacation around natural attractions, oceanside beaches, and historical archaeological or world heritage sites.**



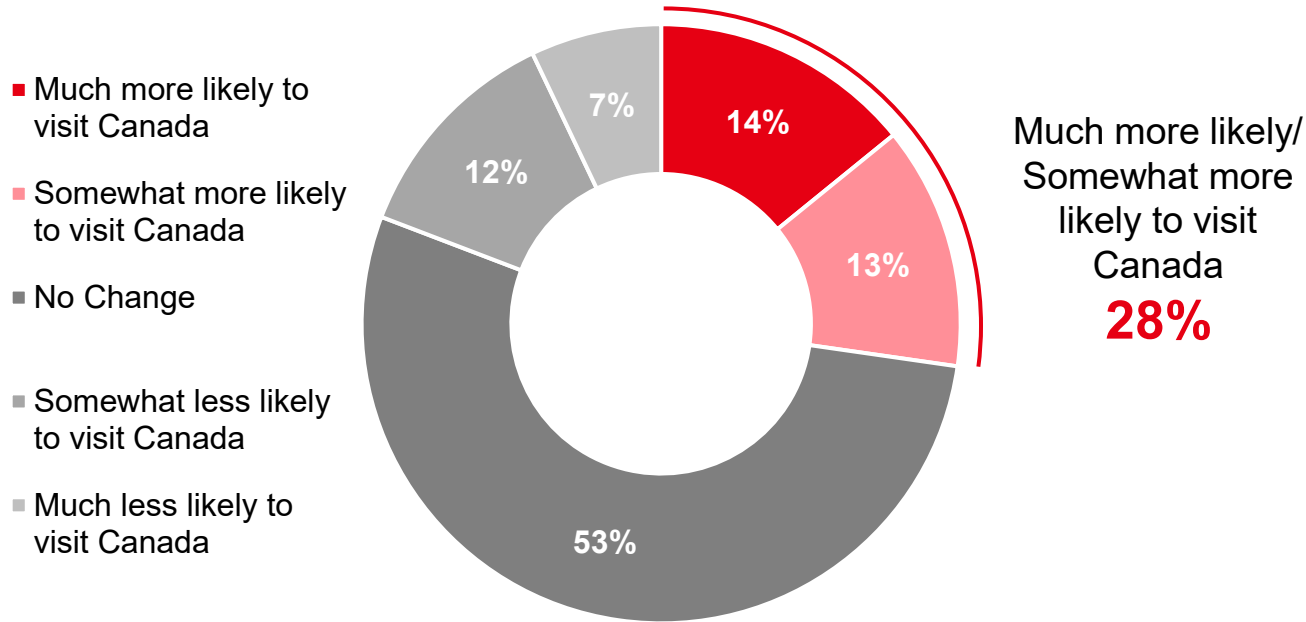
# GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

Top activities when on a vacation include trying local cuisine, natural attractions, and nature walks.



Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=3589)  
 D4. In general, what activities or places are you interested in while on vacation? (Select all that apply)

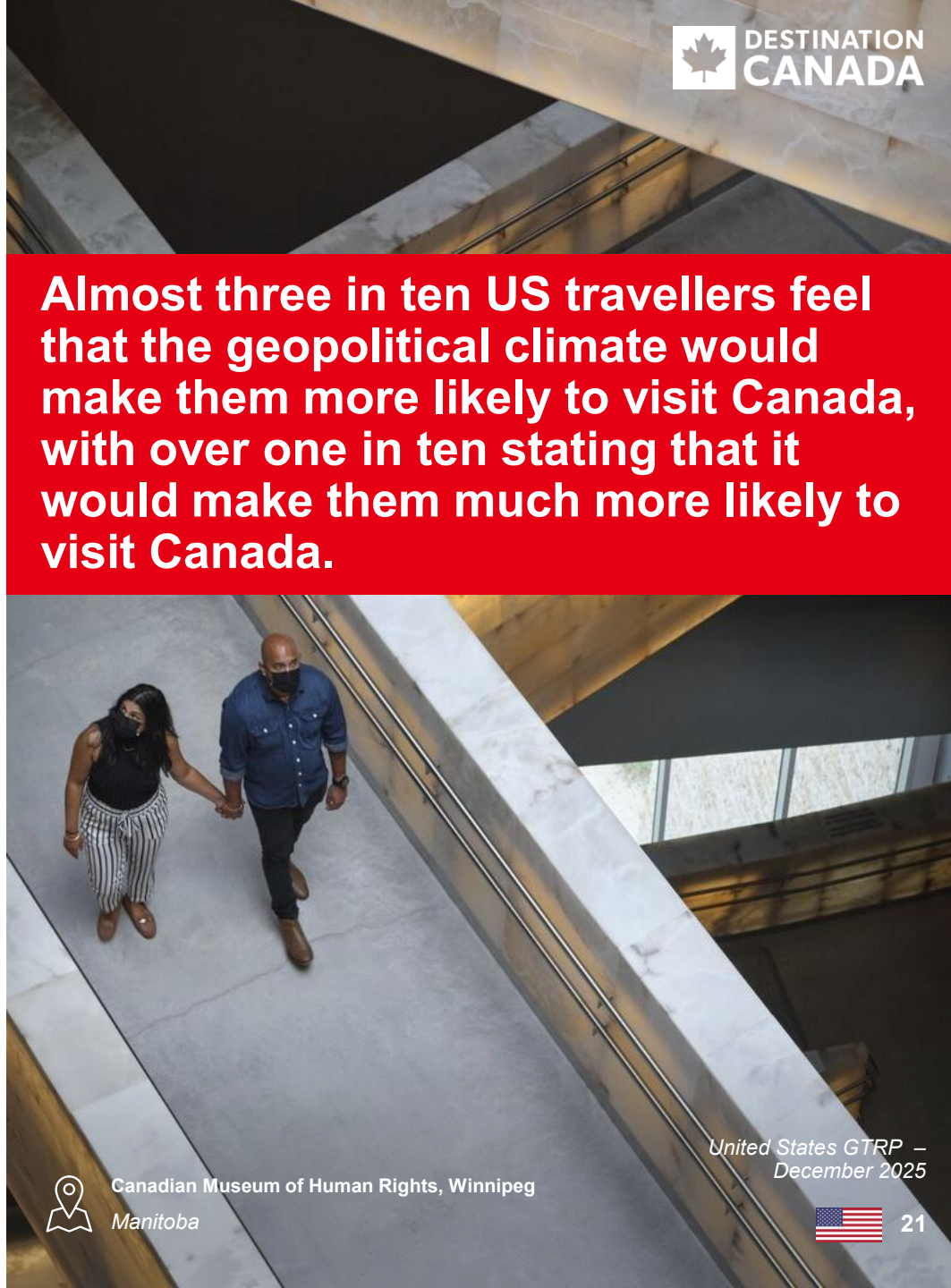
# STATED IMPACT OF GEOPOLITICAL CLIMATE ON VISITING CANADA



## Geopolitical Climate Description

Geopolitical climate can include factors such as politics, international relations, trade disputes, or global conflicts.

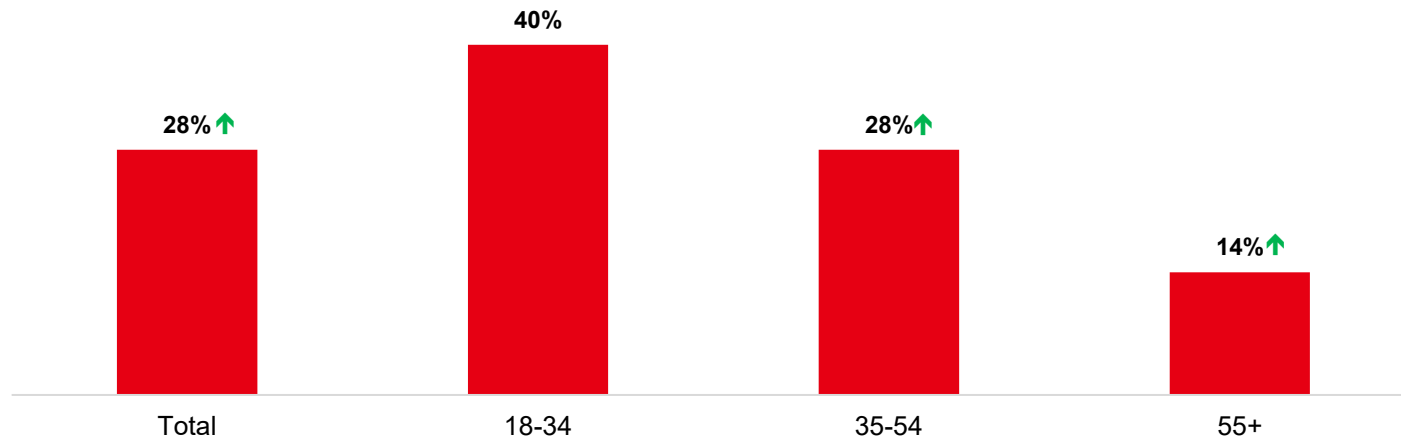
Note: respondents were asked either about decision for which airline to fly with (D18) or stated impact of geopolitical climate on visiting Canada (E16)  
 Base: Out-of-state pleasure travellers (past 3 years or next 2 years) (n=1777)  
 E16. How does the current geopolitical climate affect your likelihood of visiting Canada?



**Almost three in ten US travellers feel that the geopolitical climate would make them more likely to visit Canada, with over one in ten stating that it would make them much more likely to visit Canada.**



# USAGE OF AI TOOLS TO PLAN TRIPS: BY AGE



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Note: Question wording was updated in 2025 to include "booking a trip"  
Base: Out-of-state pleasure travellers (past 3 years or next 2 years) 2025 (n=3589); 2025 18-34 (n=1091); 2025 35-54 (n=960); 2025 55+ (n=1538)  
D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research, plan or book a trip?

AI adoption in travel planning is growing among US travellers, with significant increases this year among those aged 35+.



Montmorency Falls Park, Quebec City  
Quebec

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December 2025



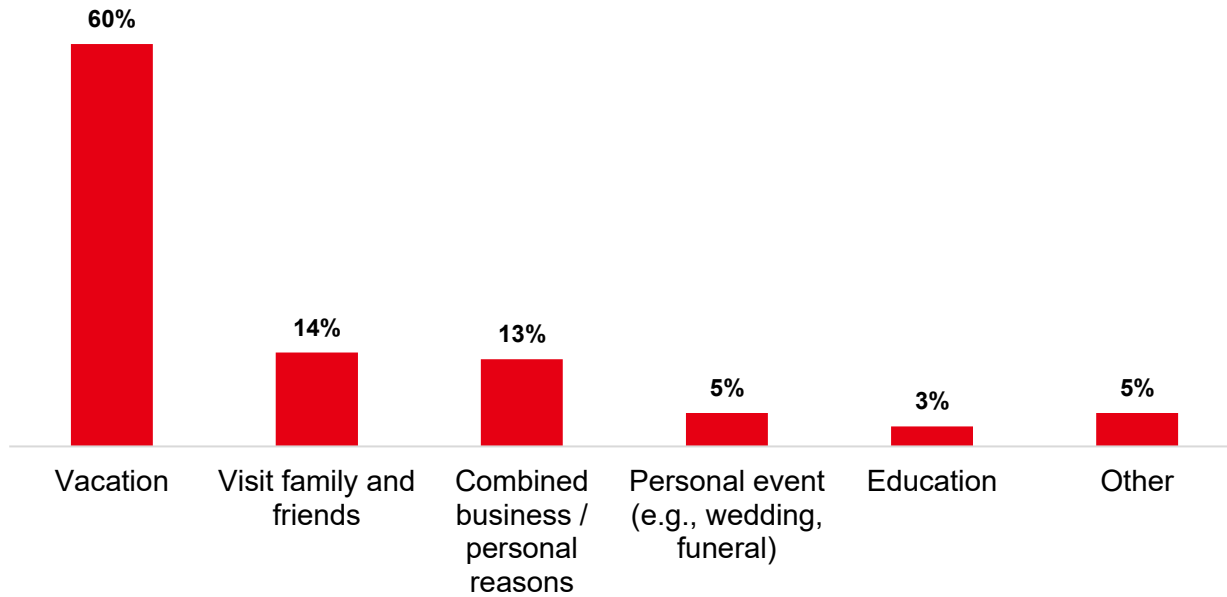
# MOST RECENT TRIP TO CANADA



Le Pays de la Sagouine  
New Brunswick



# MAIN PURPOSE OF RECENT TRIP



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=705)  
 F2. What was the main purpose of this trip? (Select one)



**Vacation continues to be the dominant purpose for US travellers to Canada in the past three years, on par with 2024.**

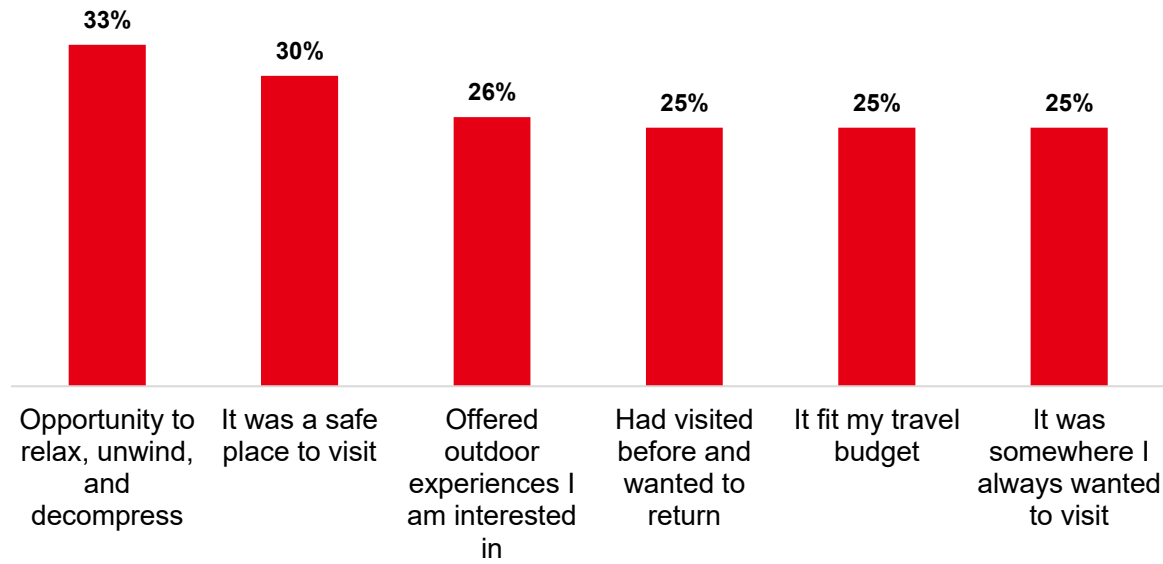


Nahanni National Park Reserves  
 Northwest Territories

United States GTRP –  
 December 2025



# FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



US travellers tended to choose Canada for the opportunity to relax and because it was a safe place to visit.

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Took a vacation (n=433)  
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

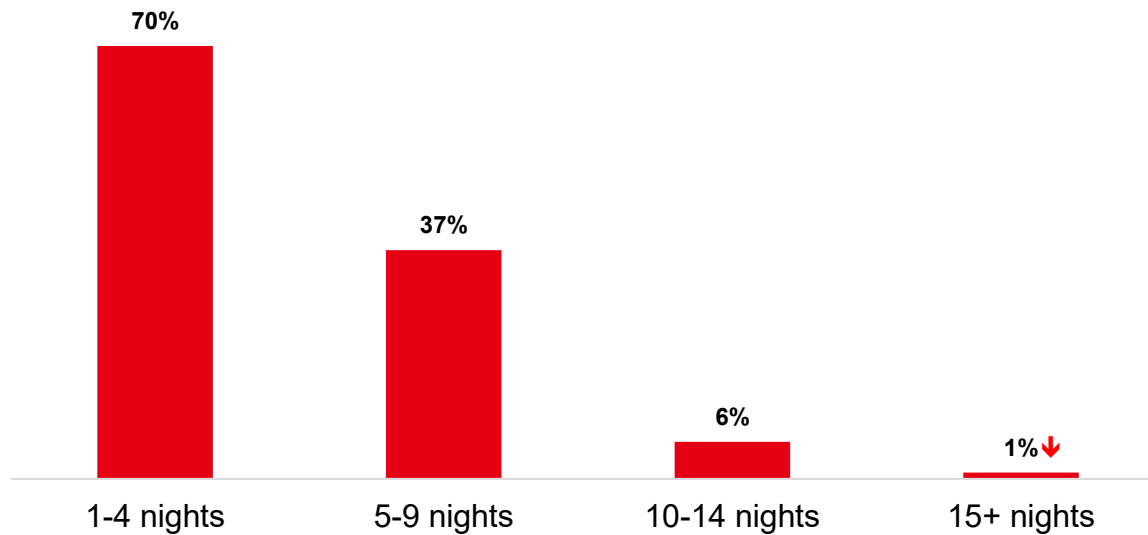


Fundy Trail Provincial Park  
New Brunswick

United States GTRP –  
December 2025



# NIGHTS SPENT DURING RECENT TRIP



**US travellers are most likely to take a shorter trip of 1-4 nights, while trips that are 15+ nights have decreased compared to 2024.**

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=705)

F4. How many nights did you spend in this destination?



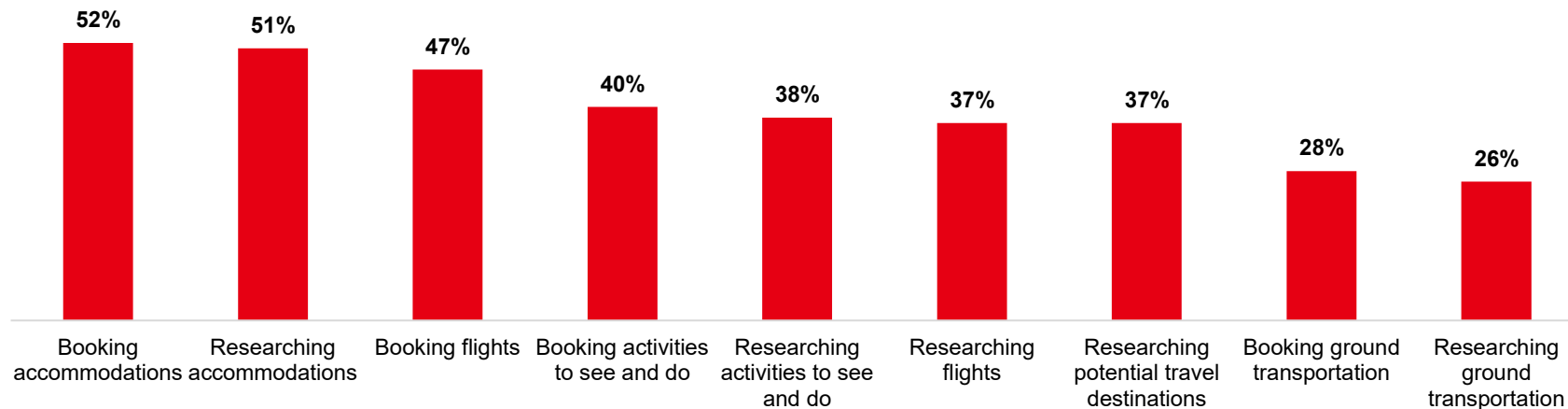
Barren Canyon, Algonquin Park  
Ontario

United States GTRP –  
December 2025



# TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP: BY DESTINATION (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)

**30%** used a travel agent



**Three in ten US travellers to Canada used a travel agent, most likely for booking or researching accommodations, followed by booking flights.**

↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=204)

F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Collette Vacations or Liberty Travel, they do not include AI Travel Assistants or online booking engines like Expedia or Booking.com. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Used a Travel Agent/Tour Operator

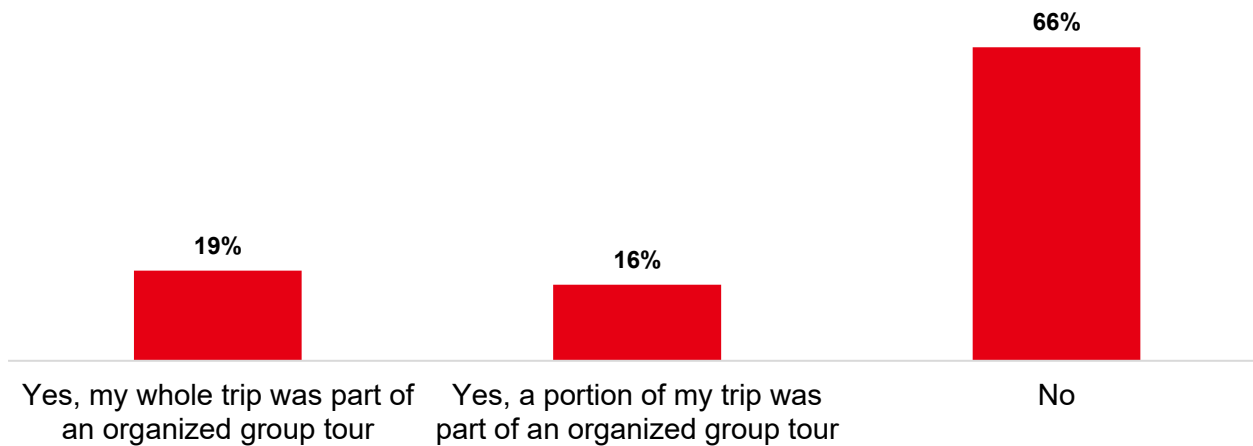
F10. Which of the following did a travel agent or tour operator help you with?

United States GTRP –  
December 2025

Twin Falls Lodge  
Saskatchewan



# ORGANIZED GROUP TOUR FOR RECENT TRIP: BY DESTINATION

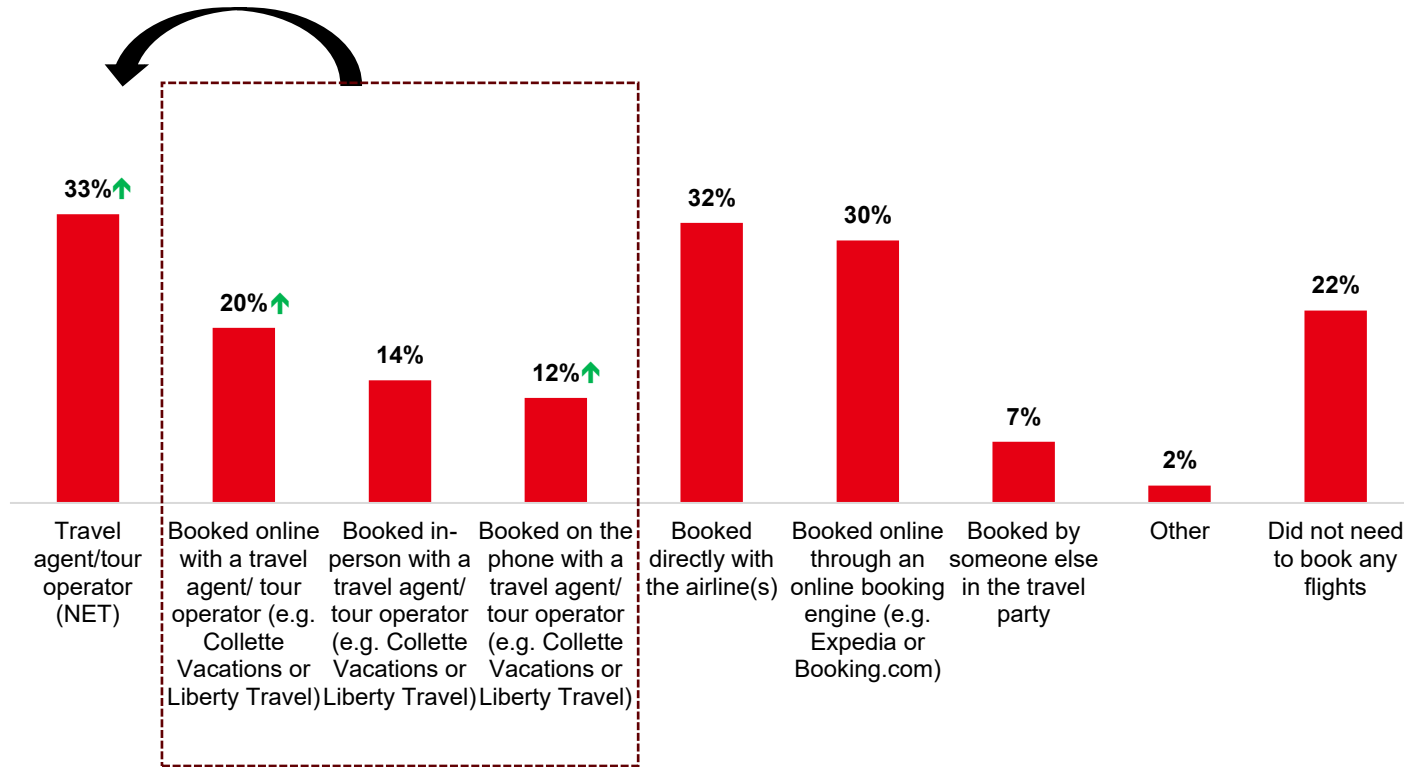


↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=705)  
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

One third of US travellers to Canada in the past three years used an organized group tour for at least a portion of their trip, with usage on par with 2024.

# BOOKING FLIGHTS FOR RECENT TRIP



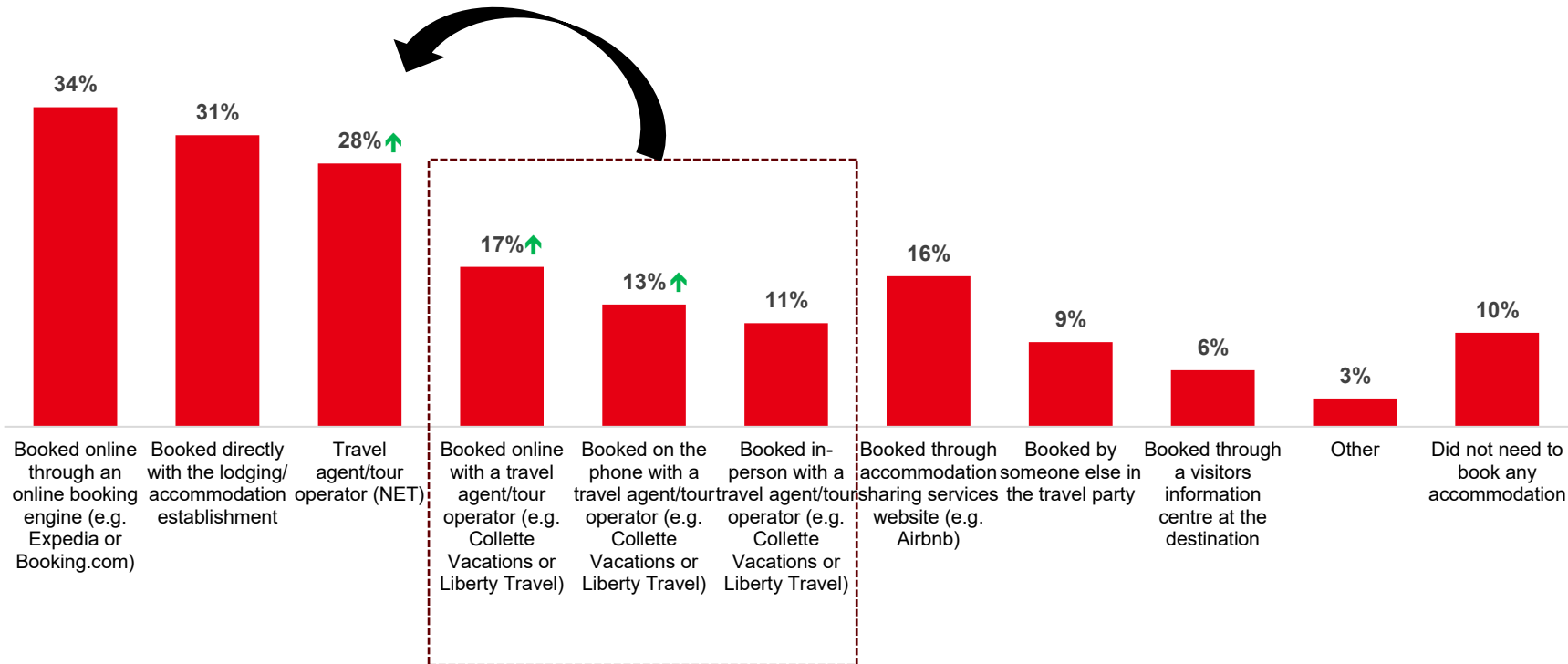
**US travellers to Canada almost equally book flights through travel agents or tour operators, directly with the airline, or through an online booking engine. Usage of travel agents or tour operators increased significantly compared to 2024.**



↑ / ↓ = significantly higher/lower result (2025 vs. 2024)  
 Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=705)  
 F12. How did you book your flight for this trip? (Select all that apply)



# BOOKING ACCOMMODATIONS FOR RECENT TRIP

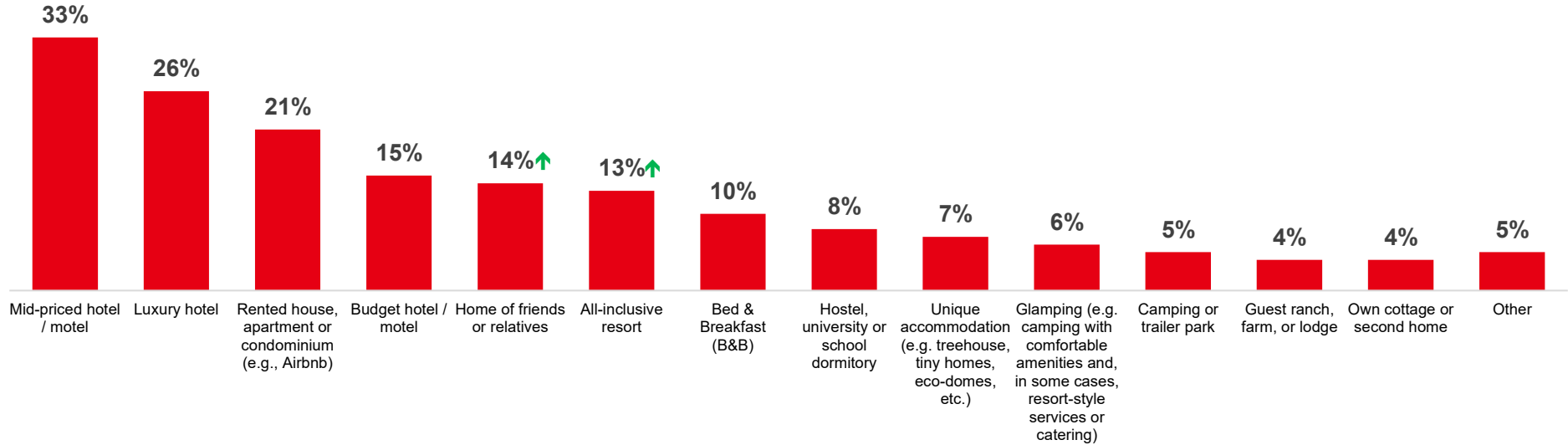


↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=705)  
 F13. How did you book your accommodation for this trip? (Select all that apply)

While online booking engines remain the primary channel for booking accommodations, followed by directly with establishments, US travellers are increasingly turning to travel agents and tour operators compared to 2024.

# TYPE OF ACCOMMODATIONS FOR RECENT TRIP



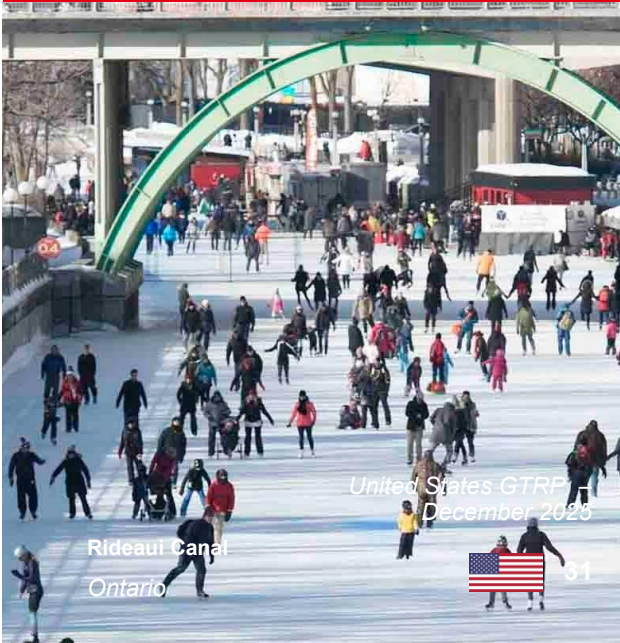
↑ / ↓ = significantly higher/lower result (2025 vs. 2024)

Base: Out-of-state pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodations (n=642)

F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



**US travellers that recently travelled to Canada were most likely to stay in a mid-priced hotel or motel.**



United States GTRF, December 2026

Rideau Canal  
Ontario



# THANK YOU

For any questions, please reach out to [research@destinationcanada.com](mailto:research@destinationcanada.com)

