



REPORT

2025 Canadian Travel & Tourism Outlook Report

ENVIRONICS
RESEARCH

TRAVEL
& TOURISM

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Canadian travellers are increasingly making values-driven decisions.

Uncover what Canadians' travel intentions are for 2025 and 2026, by focusing on how Social Values influence both their travel mindsets and destination choices.



Introduction

Understanding the values and motivations behind Canadians' travel decisions in 2025

Context

The outlook in the travel industry in Canada is bright. Canadians' appetite for travel is strong, and intent to travel to the U.S. is down – meaning there is significant opportunity for travel destinations and attractions elsewhere. Canadian and international destinations can win those trips formerly destined for the U.S. by leveraging the unique features and experiences they offer and by tapping into the varying travel needs, motivations, and values of distinct traveller segments.

About The Study

This report explores Canadians' travel outlooks and intentions between Spring 2025 and Summer 2026, with a focus on how Social Values influence both their travel mindsets and destination choices. The 2025 Canadian Travel & Tourism Outlook Report is based on a national survey of 1,516 Canadian Travellers (defined as those who are planning to take at least one overnight leisure trip in the next 12-18 months) fielded in Spring 2025. The comprehensive survey covers over 500 datapoints including travel intentions, trip planning, motivations, behaviours, Social Values, and demographic profiling.

Applying Social Values

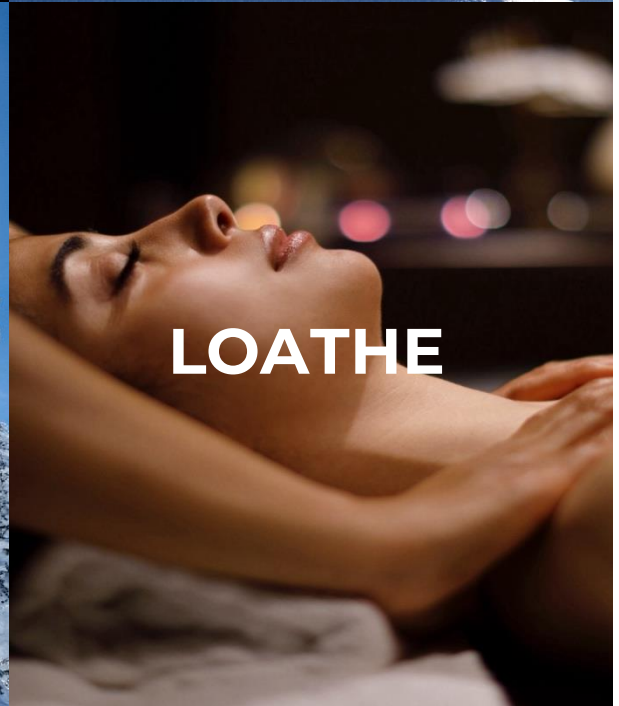
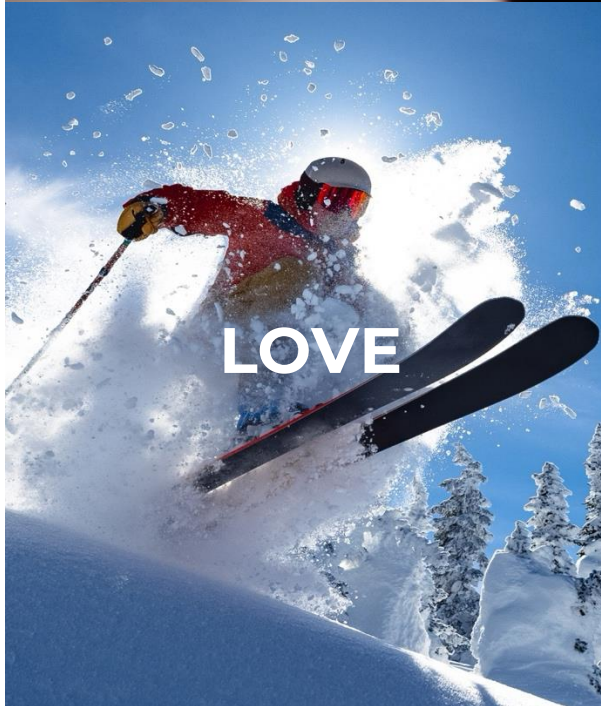
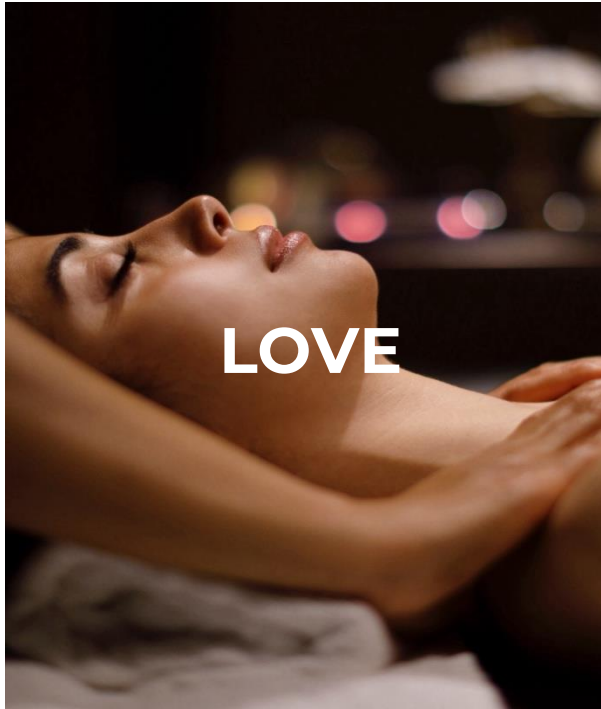
In the ever-evolving landscape of travel, understanding the values and motivations of Canadian travellers is crucial for destinations and operators looking to break through, differentiate, and capture interest. A values-based approach provides a strategic roadmap for engagement, helping destinations to create offerings and experiences tailored to the needs and preferences of distinct groups of Canadian travellers, making journeys memorable and fulfilling.

Social Values (psychographics) relate to people's deepest motivations and attitudes, revealing WHY people do what they do. For marketers and strategists, psychographic insights are a valuable complement to traditional demographic and behavioural data. Two travellers who might be demographically identical (i.e., same age, gender, socio-economic status) can be fundamentally different from a psychographic and behavioural perspective. In these cases, the most effective messaging speaks to their Social Values.

By examining the Social Values that shape various traveller mindsets, we can understand what motivates these travellers to travel (or not), what's behind their preferences for experiences, and determine how best to communicate and position products and assets for maximum impact.

Introduction

Social Values – The Keys To Traveller Engagement





Introduction | Opportunities For Destinations

In today's dynamic travel industry, the Canadian Travel & Tourism Outlook Report unveils opportunities for destinations and operators both within Canada and internationally. As Canadians research their options and gear up for travel, these data-informed insights can help destinations and operators tailor their offerings to meet the diverse and evolving preferences of travellers.



Political climate, economic factors, and cost are all shaping travel decisions, but Canadians remain keen to travel (mainly outside the United States).

There continues to be a strong appetite for travel – with some groups intending to travel more than before. One-third of Canadian travellers are avoiding travel to the U.S., a preference that opens up a window of opportunity in the foreseeable future for both Canadian and international destinations.



Share of the pie for Canada (and international destinations) has grown. Major markets standing to benefit most, 'so far' are Ontario, British Columbia, Alberta and Mexico.

Half of Canadians are taking an average three trips with at least one over-night stay over the next 12-18 months – meaning a trip roughly every six months. Canadian destinations are mostly competing with each other and with other international destinations, rather than with the U.S. It's critical for destinations to understand how to capitalize on their opportunities with target travellers and build potential.



We've identified a diverse range of Canadian traveller mindsets, each with distinct Social Values and travel preferences.

In order to cut through the noise and connect – whether it's appealing to a wilderness adventurer, urban explorer, experience seeker, or mainstream vacationer – destinations must understand who their top traveller segments are, why they travel, and what appeals to them as they progress through their journeys. Motivations, values, and mindsets influence travel decisions and vary across segments: different groups will present different market opportunities.

Section 1

Travel Intentions



Section 1: Travel Intentions

Canadian Travellers Are Optimistic

Despite political tensions and their own economic and cost concerns, Canadians remain optimistic about travel. Most plan to take more trips this year than last, although many aim to avoid travel to the U.S.



Key Consideration:

Travellers who are increasing their activity—and those deliberately avoiding the U.S.—are driven by distinct mindsets and value systems. Recognizing these underlying motivations can help tourism organizations better align their strategies and messaging for greater impact and differentiation.

Despite economic uncertainty and an uneasy geopolitical environment, nearly 8 in 10 Canadians are planning to travel as much, or more, in the coming year compared to 2024. This optimism presents a prime opportunity for destinations to attract travellers who are eager to explore new and authentic experiences.

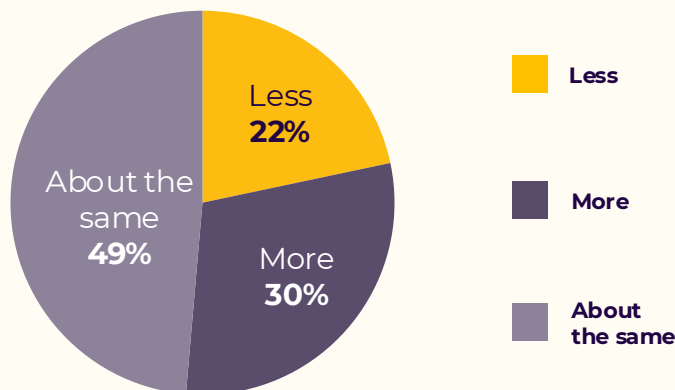
8 in 10

Canadians are planning to travel as much, or more, in the coming year compared to 2024.



In the next 12-18 months I'm planning to travel....

Q2. How do your leisure travel plans for the next 12-18 months compare to the previous year?
Base: Canadian Leisure Travellers, n=1516



Social Values Analysis

Canadians Who Are Planning To Travel More

30% of Canadians are planning to travel more in the next 12-18 months.

Canadians planning to travel more in the coming year stand out for their strong *Financial Security* and *Personal Optimism*. These travellers feel secure about their financial future and are optimistic about their personal outcomes. This sense of security and optimism along with their *Pursuit Of Novelty* and *Pursuit Of Intensity* fuels their desire to explore new destinations and embrace new experiences. They approach life with *Vitality* and have a lively attitude that drives their enthusiasm for travel and their desire for authentic and genuine experiences. *Social Learning* makes them eager to interact with locals and immerse themselves in different cultures.

Strategies to connect with this group:

- Increase awareness of lesser-known destinations or showcase attractions off the beaten path. Messages that introduce them to new travel opportunities and experiences and have an optimistic and energetic tone will be well received, ultimately sparking their curiosity and desire to explore.
- Boost consideration by showing how they can connect with the local culture. When introducing new experiences and activities, focus on genuine interactions with locals in ways that broaden travellers' perspectives and create a sense of learning and discovery.

FINANCIAL SECURITY

HIGH



PERSONAL OPTIMISM

HIGH



PURSUIT OF NOVELTY

HIGH



VITALITY

HIGH



PURSUIT OF INTENSITY

HIGH



SOCIAL LEARNING

HIGH



Section 1: Travel Intentions

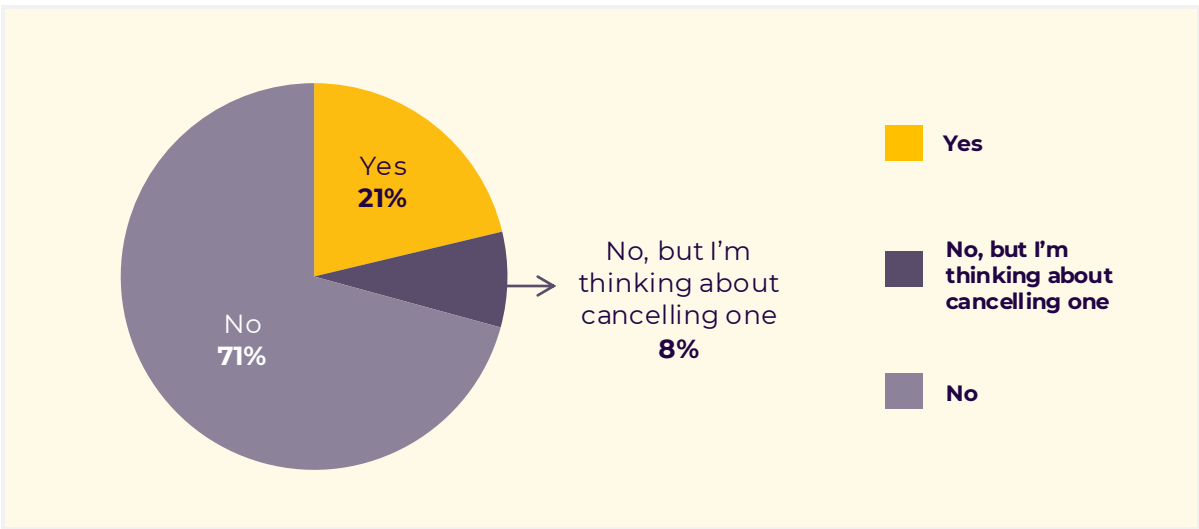
Political Climate

The avoidance of the United States is a significant trend, with 21% of Canadian travellers canceling trips to popular U.S. destinations like New York, Florida, and California. Just 13% of trips in the next 12-18 months are expected to be south of the border. This shift opens up opportunities for Canadian and international destinations to position themselves as attractive alternatives.

Did you cancel any trips to the U.S. in the past couple of months?

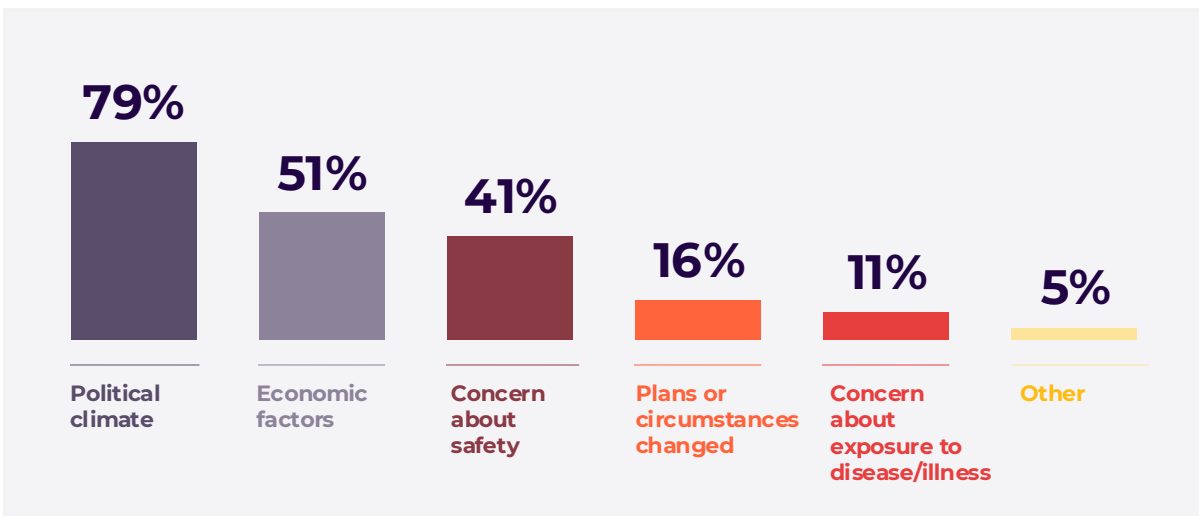
Q4. Did you cancel any trips to the U.S. in the past couple of months?

Base: Canadian Leisure Travellers, n=1516



Which of the following influenced your travel plans?

Q6. Which of the following, if any, influenced your travel plans?



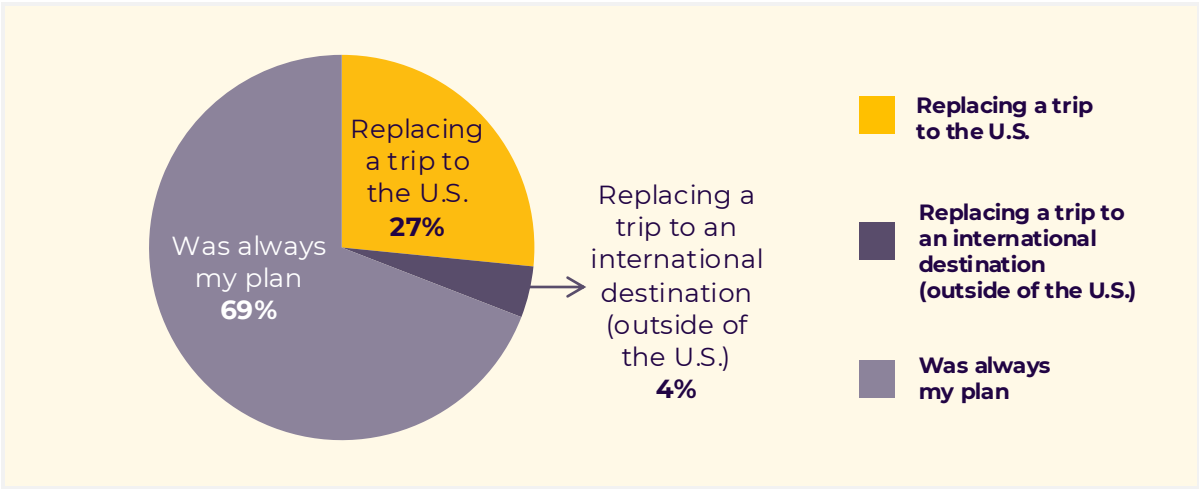
Section 1: Travel Intentions

Domestic Loyalty

Nearly 3 in 10 Canadians planning to travel locally or domestically are replacing a trip they would have otherwise taken to the U.S. The states most impacted by cancellations are New York, Florida, and California, but the drop in travel interest is seen across the country. The political climate is the top reason for trip cancellations but economic factors and concern about safety are also affecting travel plans.

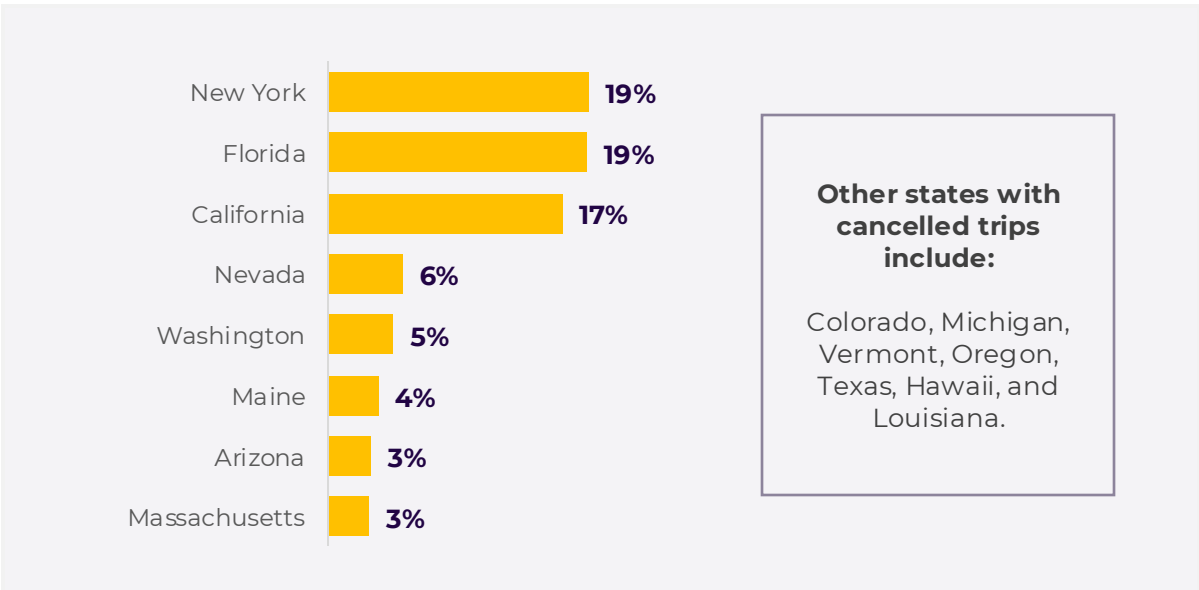
Next local / domestic trip is...

Q5a. Is your next local / domestic trip replacing a trip you would have take to a destination outside of Canada?



Top states with trips originally planned

Q5b. Which state were you originally planning to visit?



Social Values Analysis

Canadians Who Replaced a U.S. Trip With Canada

27% of Canadians say they have replaced a trip to the U.S. with one in Canada.

Canadians choosing to replace trips to the U.S. with domestic travel have high *Global Consciousness*, considering themselves citizens of the world, and value an authentic lifestyle. They are driven by *Pursuit Of Intensity* and are not shy to voice their opinions. If they are not aligned with the current direction of U.S. politics, their values are such that they would likely “walk the talk” and be less willing to visit America. It’s also likely that these outspoken travellers would advocate for others to follow suit. They believe in *Community Involvement* and an *Active Government*, whose role is to get involved in societal issues, and will have listened to, and advocated for, the calls for boycotting travelling to the U.S. This sentiment drives them to seek alternative destinations that align better with their values and preferences.

Strategies to connect with this group:

- Boost consideration by appealing to their values: This group will be open to messages that prioritize Canada over the U.S. but that also situate Canada as part of the world at large (vs. more isolationist messaging).
- Drive conversion by showcasing the benefits of local exploration: Staying local can be a way to get involved in the community and support neighbours, but also a chance to explore your backyard and find new experiences close to home.

GLOBAL CONSCIOUSNESS

HIGH



PURSUIT OF INTENSITY

HIGH



ACTIVE GOVERNMENT

HIGH



CONSUMPTION EVANGELISM

HIGH



BRAND GENUINENESS

HIGH



COMMUNITY INVOLVEMENT

HIGH



Section 2

Travel Destinations





Section 2: Travel Destinations

Where Are Canadians Going?

Share of the pie for Canada and international destinations has grown. Major markets standing to benefit most, 'so far' are Ontario, British Columbia, and Alberta in Canada, and internationally, Mexico, the United Kingdom, and France.



Key Consideration:

Destinations that align with the values, motivations, and preferences of travellers seeking new places to visit will have an edge in attracting Canadians who are not ready to visit the U.S.

Canadians are balancing connection with exploration—prioritizing local visits to loved ones while seeking meaningful experiences abroad. Canadians are planning an average of three trips in the next year. Over half will stay within their province or elsewhere in Canada, while one in three are heading abroad to destinations outside of the United States.

Top domestic destinations include Ontario, British Columbia, and Alberta, with Quebec close behind. Urban centres and familiar local spots are the most popular, with visiting friends and family being the top reason for travel—followed by the desire for new experiences and adventure. Since Canadians are increasingly rediscovering what is in their own backyard, local attractions will see increased competition as new entrants begin to fight for a share of travellers' time and wallet.

Internationally, Mexico leads as the most popular destination, with various European countries also exerting a strong draw. For international trips, cultural experiences and local attractions become more important drivers in travellers' decisions about where to go.

55%

of Canadians' planned trips are either domestic or provincial (local).



**Domestic
(in Canada)**

OR



**Local (within
their province)**

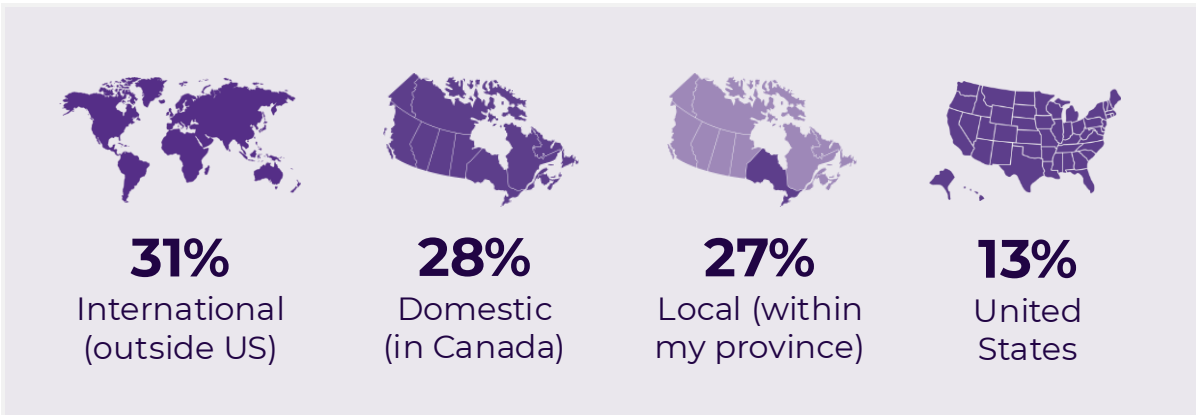
Section 2: Travel Destinations

Upcoming Travel Plans

Canadians are planning an average of three trips between Spring 2025 and Summer 2026, with a mix of local, domestic, and international destinations. Only 13% of all planned leisure trips are to the U.S.

Destinations of the next five trips planned...

Q1N. Where specifically do you plan to visit? Base: next five planned trips that are local(n=746)

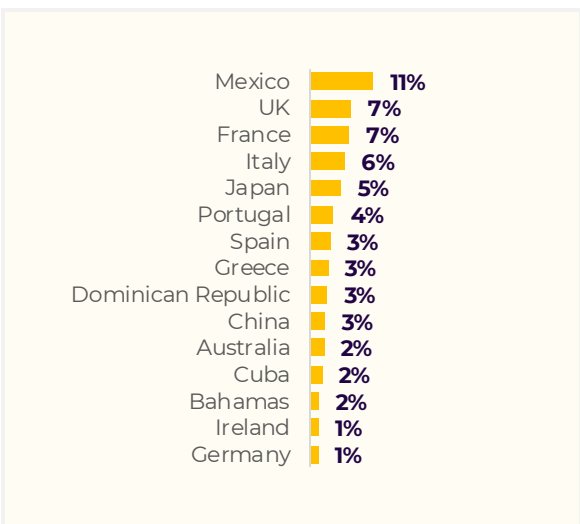


Mexico and various European destinations are the top international destinations of choice, but sun and sand (Caribbean and Central American) destinations collectively account for 22% of international trips, with the Dominican Republic, Cuba, and Bahamas being the next most popular destinations. Among European destinations, the United Kingdom, France, and Italy are the top destinations.

Planned Country Destinations (out of next five trips)

Q1N. Where specifically do you plan to visit?

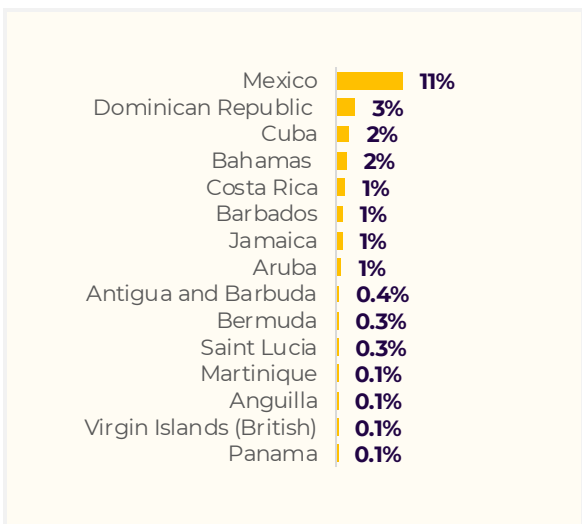
Base: next 2 planned trips with an international destination (n=827)



Sun & Sand Trips (out of international trips planned)

Q1N. Where specifically do you plan to visit?

Base: next 2 planned trips with an international destination (n=827)



Section 2: Travel Destinations

Provincial Travel

Canadians travelling within their province gravitate towards large cities and small, well known, local destinations. For Ontarians, that means that top urban centres like Toronto and Ottawa compete with smaller destinations like Niagara Falls, Kingston, Muskoka, and Prince Edward County as the top destination of interest.

Top destinations within Canadian provinces

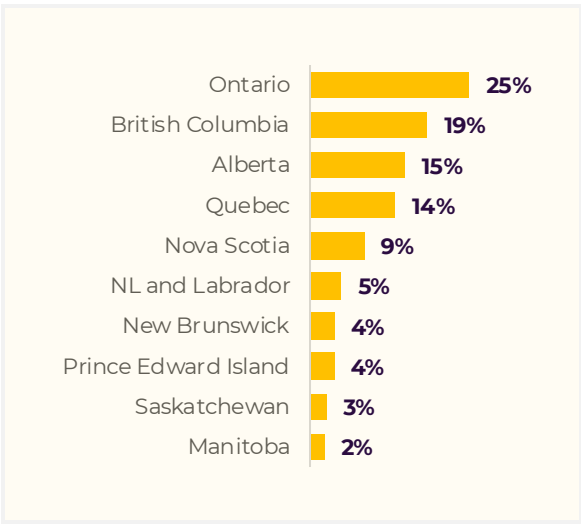
Q1N. Where specifically do you plan to visit? Base: next five planned trips that are local (n=746)

Ontario	B.C.	Atlantic	Quebec	Alberta	Saskatchewan	Manitoba
Toronto	Vancouver	Halifax	Quebec City	Calgary	Saskatoon	Winnipeg
Niagara Falls	Victoria	St. John's	Gaspésie	Edmonton	Regina	Lake of the Woods
Ottawa	Vancouver Island	Cape Breton	Montreal	Banff	Southern Sask.	Bird River
Kingston	Whistler	Newfoundland	Charlevoix	Jasper	Moose Jaw	Whiteshell
Muskoka	Okanagan	Fredericton	Bas-Snt-Laurent	Medicine Hat	Swift Current	Riding Mountain
Windsor	Kelowna	Lunenburg	Mont-Tremblant	Red Deer	Estevan	Birds Hill
P.E.C.	Kamloops	Corner Brook	Saguenay	Canmore		
Stratford	Harrison	Moncton	Magog	Rockies		
Algonquin Park	Osoyoos	Five Islands	Laurentians	Lethbridge		
Thunder Bay	Tofino	Digby	Rimouski	Milk River		
London	Vernon	Avalon Pen.	Lanaudière	Lake Louise		
Collingwood	Squamish	P.E.I.	Rivière-du-Loup	Cypress Hills		

Among Canadians planning to travel outside of their province, Ontario is the top destination, followed by British Columbia and Alberta. Combined, the Atlantic provinces account for 20% of planned trips, proving they are one of the top contenders attracting domestic travellers across Canada.

Canadian province planned to visit (out of the total next five trips)

Q1N. Where specifically do you plan to visit?



“

I have been all over the world but never to eastern Canada. Newfoundland and Labrador seem especially beautiful.

- Study Respondent

“

Have never been to the east coast and would like to see as much of my country as possible.

- Study Respondent

Section 2: Travel Destinations

Trip Planning

Travellers generally use hotel or airline websites and hotel or travel aggregators to help them both research and book trips. Travel destination websites are also important resources for research.

Preferred Travel Resources

Q15. Which of the following are you likely to use to research and book your trip?



Canadians are mindful of their budgets and the types of accommodations they choose. Local trips tend to be shorter and more budget-friendly, while international trips come with higher costs and longer stays. The average local trip lasts about five days with a budget of \$2,000, whereas international trips can extend to over ten days with budgets exceeding \$5,000. Operators can tailor their offerings to match these budgetary considerations, providing value-added services and experiences that enhance the overall travel experience.

Trip Profile	Local (within my province)	Domestic (in Canada)	United States	International (outside US)
Average # of nights at the destination	5.5	7.0	7.5	10.4
Average planned trip spend	\$2,283	\$2,956	\$3,715	\$5,177
Average travel party size	2.5	2.4	2.5	2.3
Top types of accommodations	Hotel, family home. More likely to RV/camp	Hotel, family home, short-term rental.	Hotel, family home, short-term rental.	Hotel, short-term rental, family home, resort.
Trip format	More likely to take road trips, camping trips and cottage trips	More likely to family or take road trips	More likely to take a cruise	More likely to take guided day trips, cruises



Section 2: Travel Destinations

Trip Preferences & Drivers

The motivations behind travel plans are diverse. Visiting family and friends remains a top reason for travel, but the desire for new experiences, cultural attractions, and outdoor activities also drives Canadians' choices.

Destinations that can offer a mix of these elements will be well-positioned to attract travellers. Whether it's exploring historic sites, indulging in gastrotourism, or embarking on nature adventures, Canadians are eager to make the most of their travel experiences.

Reason for choosing destination

Q7. Why did you choose this destination?

Legend: Above Average / Below Average

Destinations & Activities <i>% per trip; multi-select</i>	Local (within my province)	Domestic (in Canada)	United States	International (outside US)
Visiting family and friends	31%	36%	24%	29%
New experiences and adventure	16%	16%	20%	21%
Cultural and local attractions	14%	14%	17%	20%
Nature and outdoor activities	14%	11%	11%	11%
Convenience and practicality	10%	10%	11%	10%
Relaxation and leisure	7%	6%	11%	9%
Special events and celebrations	10%	10%	10%	6%
Weather and climate	3%	3%	4%	6%
Food entertainment and nightlife	4%	3%	5%	6%
Business obligations and other practical reasons	3%	3%	4%	2%

Section 2: Travel Destinations

Trip Preferences & Drivers

Top activities across destinations are city exploration, gastrotourism, shopping, and historic sites. All these activities tend to be generally more sought out in international destinations and less in local destinations.

Legend: Above Average / Below Average

Experiences & Activities % per trip; multi-select	Local (within my province)	Domestic (in Canada)	United States	International (outside US)
City exploration	44%	48%	49%	53%
Gastrotourism	33%	34%	37%	40%
Shopping	30%	30%	36%	34%
Historic sites and monuments	29%	31%	29%	38%
Art & culture exploration	23%	29%	24%	32%
Sun and sand vacation	22%	22%	25%	26%
Local festivals/special events	24%	26%	20%	25%
Musical acts, concerts, festivals	16%	15%	14%	15%
Spa & wellness experience	11%	11%	11%	12%
Golfing	6%	6%	7%	5%

Among nature-based activities, “Outdoor sports and activities” is the top choice across destinations and is especially important among local and domestic trips. Wildlife viewing also stands out locally and in Canada.

Legend: Above Average / Below Average

Destinations & Activities % per trip; multi-select	Local (within my province)	Domestic (in Canada)	United States	International (outside US)
Outdoor sports and activities	35%	36%	31%	31%
Water outdoor activities	19%	18%	16%	17%
Wildlife viewing	18%	18%	15%	15%
Regenerative tourism	11%	13%	11%	14%
Astro-tourism	7%	6%	8%	6%
Indigenous tourism	5%	7%	7%	6%
Hunting and angling	5%	5%	4%	3%
Winter outdoor activities	3%	5%	4%	3%

Section 3

Traveller Segments



Section 3: Traveller Segments

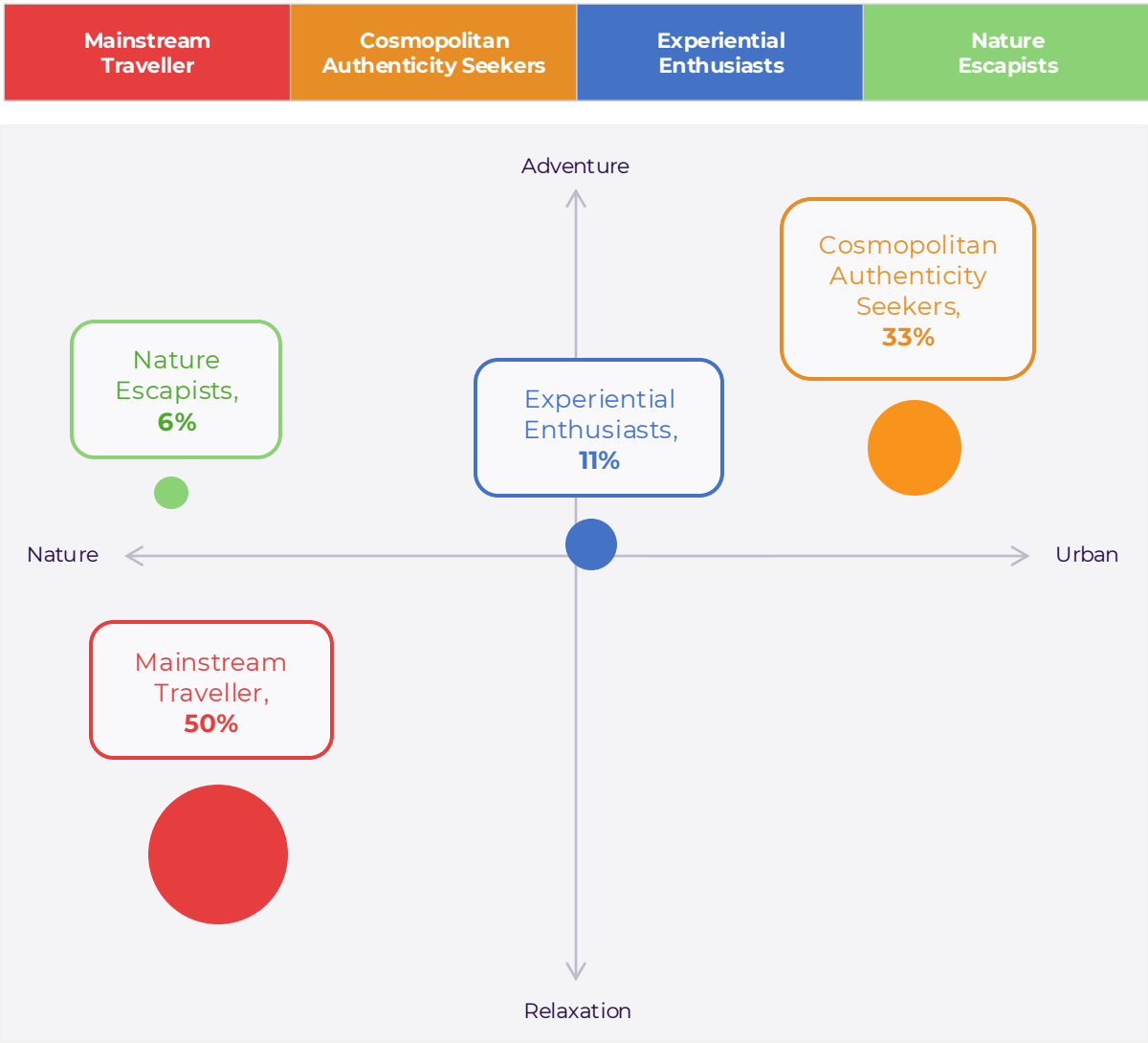
Diverse Traveller Audiences

Four traveller segments emerge based on their trip preferences, mindsets, and motivations. By understanding and considering this diverse range of traveller audiences – each with their own set of trip expectations, influences, mindsets, and values – operators can make their targeting and engagement efforts more effective.



Key Consideration:

There are nuances based on different traveller mindsets, values, and destination positioning that will determine travel decisions and opportunities to grow among target visitors.





Section 3: Traveller Segments

Mainstream Traveller (50%)

Will travel locally, domestically, and internationally, with a general preference for comfort and safety. Internationally, they favour resort destinations in established markets like Mexico. They tend to be utilitarian and cost-conscious and will happily return to places they've been to before and that feel like a second home.

BRAND
APATHY

HIGH



UTILITARIAN
CONSUMERISM

HIGH



TRADITIONAL
FAMILY

HIGH



ATTRACTION
TO CROWDS

LOW



CULTURE
SAMPLING

LOW



ADAPTABILITY
TO COMPLEXITY

LOW





Section 3: Traveller Segments

Cosmopolitan Authenticity Seekers (33%)

With the highest potential for international trips, these urban travellers tend to spend more and travel in comfort. They like to be spontaneous and prefer experiences that feel genuine as opposed to touristy or packaged. When travelling, they enjoy exploring historical sites, arts and culture, food and drinks, and will sit at a café and people-watch to experience the buzz of the city and feel like locals.

ECOLOGICAL CONCERN

HIGH



IMPORTANCE OF SPONTANEITY

HIGH



BRAND GENUINENESS

HIGH



ETHICAL CONSUMERISM

HIGH



CONFIDENCE IN ADVERTISING

LOW



PENCHANT FOR RISK

LOW





Section 3: Traveller Segments

Experiential Enthusiasts (11%)

This segment is looking to experience Canada. They are chasing the next viral trend and want to ensure that they tick off all the must-see and must-do experiences. They don't want to limit themselves to categories, so they look for a range of activities to indulge in. It's not about spontaneity; it's about carefully curating their trips so that they don't miss out! They like high-intensity experiences and love the energy of a good crowd.

ATTRACTION
TO CROWDS

HIGH



PURSUIT OF
INTENSITY

HIGH



PURSUIT OF
NOVELTY

HIGH



CONSUMPTION
EVANGELISM

HIGH



CONCERN FOR
APPEARANCE

HIGH



OSTENTATIOUS
CONSUMPTION

HIGH





Section 3: Traveller Segments

Nature Escapists (6%)

These are local travellers, preferring to stick close to home and take multiple trips that are relaxing, no-frills, and nature-focused. They are drawn to nature and use that as a means to escape the stress of their everyday lives, with camping being a key travel choice.

ATTRACTION
TO NATURE

HIGH



NEED FOR
ESCAPE

HIGH



AVERSION TO
COMPLEXITY

HIGH



UTILITARIAN
CONSUMERISM

HIGH



VOLUNTARY
SIMPLICITY

HIGH



IMPORTANCE OF
SPONTANEITY

HIGH





Section 3: Traveller Segments | **Travel Mindsets**





In a competitive and dynamic travel landscape, values-driven insights are your edge.

To grow your visitor base and create experiences that truly resonate, you must go beyond demographics. Understand the motivations, values, and mindsets that drive travel decisions, because not all visitors are equal – some groups offer greater opportunity.



Conclusion | About The Study

Environics Research is one of Canada's leading custom research and consulting firms, with a reputation for integrity, accuracy, and insight. Leveraging over 55 years' experience and unique Social Values research that uncovers people's values, mindsets, and beliefs, we get to the heart of what motivates consumers and help our clients harness those insights to engage effectively and to drive growth.

Environics Research conducted a 10-minute survey with n=1,515 Canadian residents about their leisure travel intentions. Responses were then analyzed to create profiles of travellers' Social Values, providing insight into their preferences and motivations. Results are based on any out-of-town trip of one or more nights for the purpose of pleasure, visiting family or relatives, vacation, events, or trips that combine business and leisure. It excludes trips solely for business, conventions, or personal errands. The study explores:

Topics:

- Travel outlook and context
- Traveller intentions: domestic, U.S., and international

Trip profiles – next two trips with an overnight stay:

- Destination
- Travel party size
- Duration of trip
- Accommodation, activities and spend

Traveller profile

- Demographics
- Traveller mindset
- Social Values
- Research and booking resources

Destination marketing:

- Ad recall and salience

The Canadian Travel & Tourism Outlook study was fielded from April 11 – 24th, 2025 and was weighted to be representative of Canada by age, gender, and region. Unweighted sample distribution:

Region	%	n
Atlantic	10%	152
Quebec	19%	288
Ontario	32%	479
Manitoba and Saskatchewan	12%	175
Alberta	14%	205
British Columbia	14%	217
Total	100%	1,516

Age	%	n
18 – 34	25%	385
35 – 54	35%	525
55+	40%	606
Total	100%	1,516

Gender	%	n
Male	55%	828
Female	45%	688
Total	100%	1,516



Conclusion | **Work With Us**

Environics Research provides organizations with actionable, evidence-based solutions to real business problems. We partner with clients to understand the business challenges they face and leverage innovative and creative solutions to generate understanding and insights.

55

Years of
Expertise

500

Unique
Datapoints

1,516

Canadians
Surveyed

4

Traveller
Segments

To learn more about how we can support your team with custom insights, contact our experts:



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Traveller Segments - Detailed profiles for our four traveller segments



Regional Trip Profiles – Custom insights on who is travelling and why



Social Values – Unlock travel preferences & motivational messaging



Custom Analysis & Reporting – We're here to uncover your unique needs

Contact us for
more insights on
Travel & Tourism.