State of the North American International Traveler

Tuesday, October 27, 2026



miles PARTNERSHIP

Future Partners

With You Today



Erin Francis-Cummings

President & CEO,
Future Partners



Chris Adams

Head of Research & Insights,
Miles Partnership

Future Partners' The State of North American International Traveler Study

Future Partners

WEBINAR | IN PARTNERSHIP WITH MILES PARTNERSHIP

The State of the North American Traveler

Who American and Canadian outbound travelers are, where they want to go, and how they decide decide

Erin Francis-Cummings | President & CEO, Future Partners | October 27, 2026

Today’s Guest Speaker



Ryan Gillis

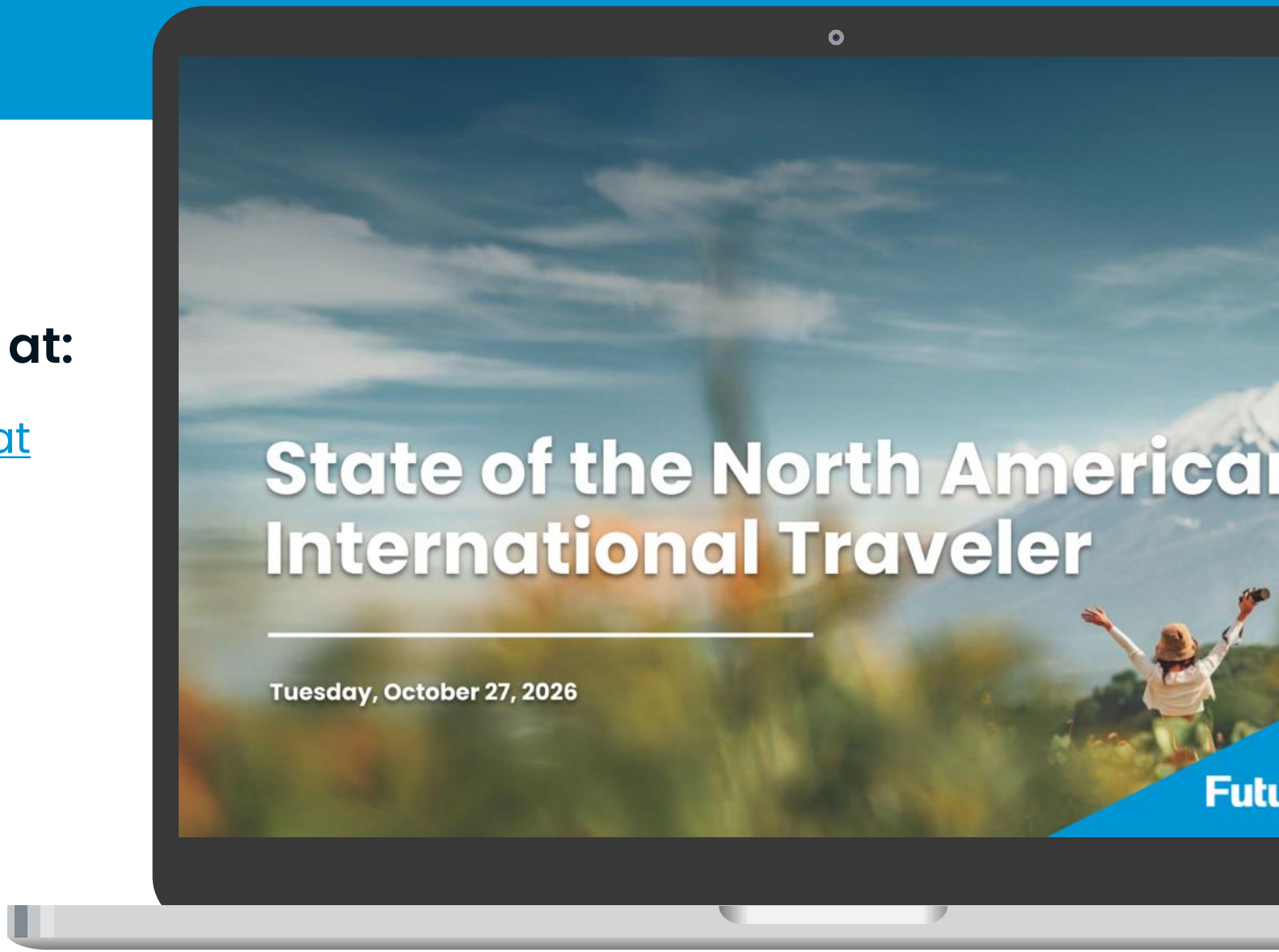
Associate Director, Research & Insights,
TripAdvisor

Research and Webinar Resources

Research, slides and other resources will be available at:

www.milespartnership.com/snat

www.futurepartners.com



Today

1. The Importance of the American & Canadian Markets
2. Profiles of American & Canadian Outbound Travelers
3. Insights from TripAdvisor



Unmatched Understanding of Travel

Our 35+ years of experience and exclusive partnerships with leading research and data firms power our extensive, detailed and nuanced understanding of global travelers.

We turn those insights into action through impactful strategies that reach and convert high-value audiences.

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

GWI.

Phocuswright

Future Partners

Tripadvisor

Basis Technologies

amazon

A Few of Our Clients



Global

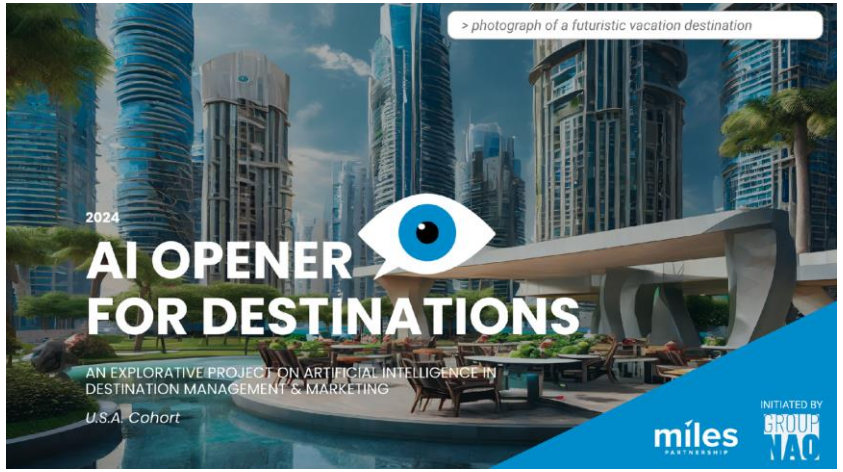
Research & Insights

- Travel Insights & Trends
- AI & Technology Use
- Paid Media & Advertising
- Meetings & Events
- Sports Travel
- Sustainable Travel
- DMO & Tourism Funding
- Destination Management

milespartnership.com









See 'How we Think' @ milespartnership.com

GLOBAL OUTBOUND TOURISM

Who Travels the World?

Where international travelers come from, ranked by what they spend abroad. Spending is 2024, the latest full country-level year. Trip counts and market-wide totals are 2025 where available.

1.52B

International tourist arrivals, 2025

Up 4% on 2024

$2.2T

International tourism export revenue, 2025

A record, including passenger transport

$927B

Outbound spending by the top 10 source markets, 2024

About 80% of the ~$1.16T reported by 193 countries

$237B

North American outbound travel spending, 2024

20% of the global total

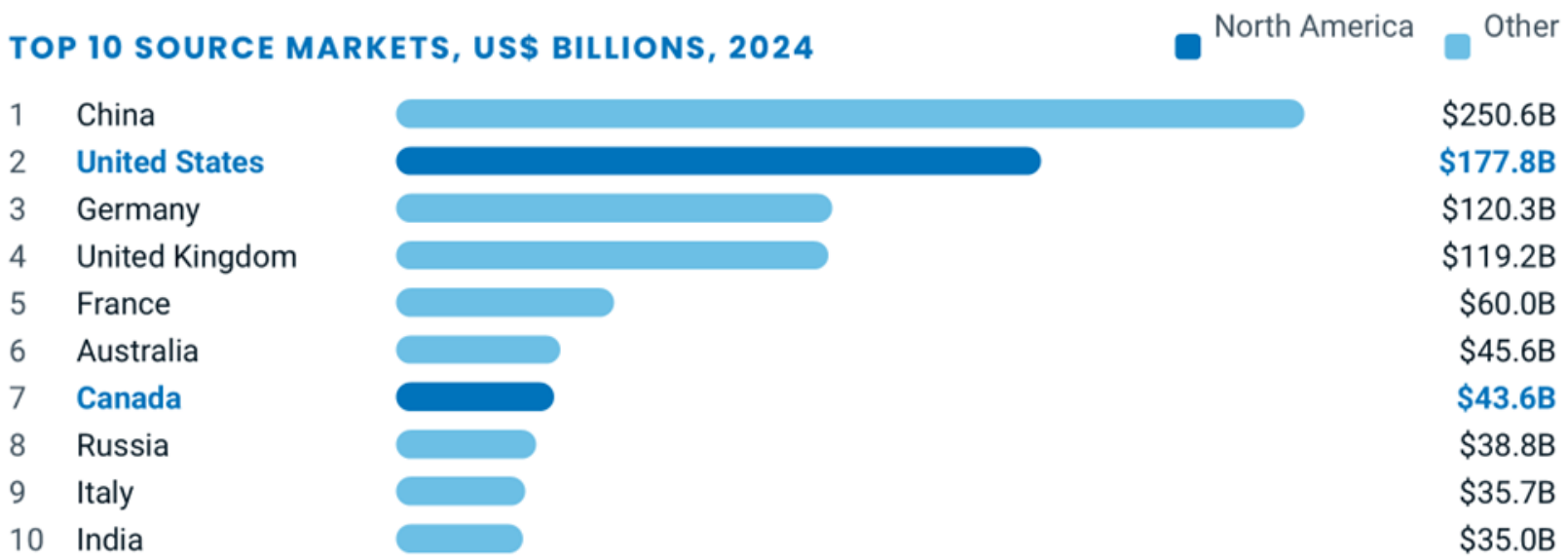
NORTH AMERICA

$237B

≈20% of global outbound spend

USA	$177.8B · #2
Canada	$43.6B · #7
Mexico	~$15.7B · about #19

TOP 10 SOURCE MARKETS, US$ BILLIONS, 2024



US PASSPORT OWNERSHIP

Passports Become Mainstream in the US

The share of Americans with a valid US passport, at three turning points.

1990

~5%

of Americans held a valid passport

About 1 in 20

Passports were not yet required for Canada, Mexico or the Caribbean.

Sources put the share at 4–5%.

+22 pts

2007

27%

of Americans held a valid passport

More than 1 in 4

Air travel to Canada, Mexico and the Caribbean began requiring a passport in January 2007.

82.1M valid passports.

+23 pts

2025

~50%

of Americans held a valid passport

About 1 in 2

A record 27.3M passports were issued in fiscal 2025.

183.2M valid passports. Estimated 48–53%.

Sources: US State Department, Bureau of Consular Affairs (valid passports in circulation, fiscal-year data); Congressional Research Service; Statista. Counts include passport books and cards, and some people hold more than one, so the share of people is lower than the raw count implies. 2025 share is an estimate from the 183.2M count. Point changes are rounded.

US TRAVEL TO EUROPE

1990: 8 million US visitors to Europe

= 1 million visitors



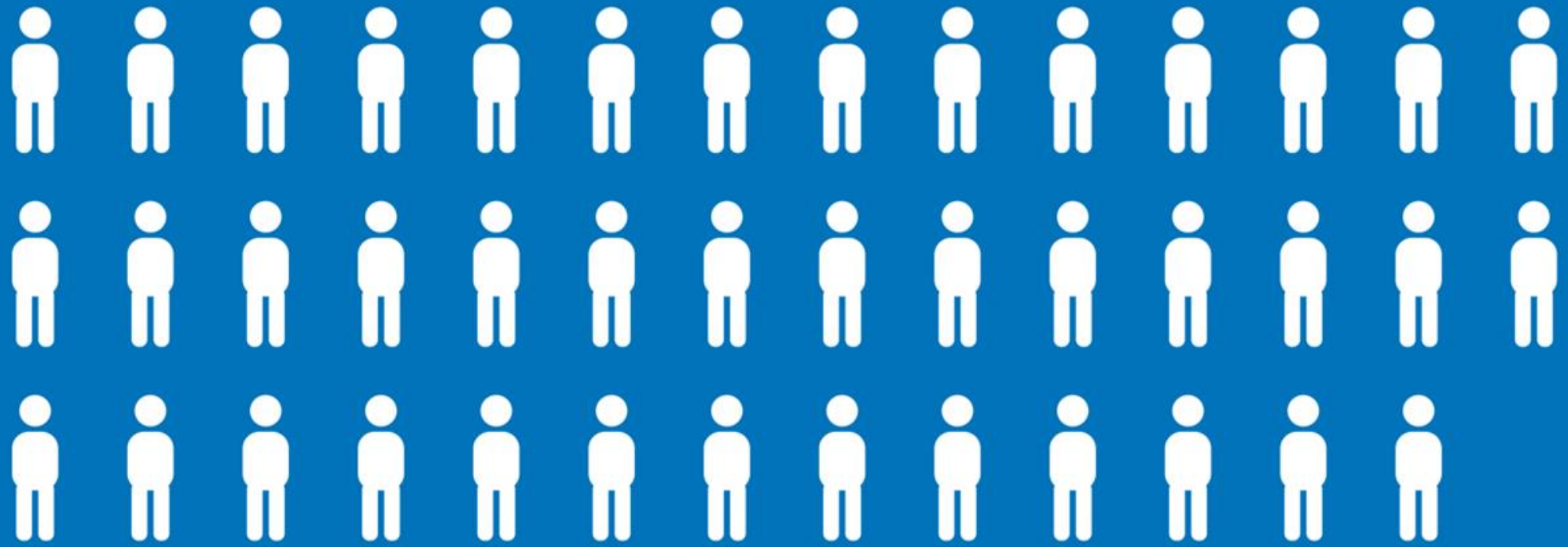
Source: NTTO international travel departures by US travelers, 1990 to 2024

US TRAVEL TO EUROPE

2024: 41 million US visitors to Europe

= 1 million visitors

About 5x 1990



Source: NTTO international travel departures by US travelers, 1990 to 2024

INTERNATIONAL TRAVEL

North American Global Hot Spots

2015-2025. Portugal, Japan and Italy make both lists.

FASTEST GROWTH IN US VISITORS

Portugal	~5x vs. a decade earlier
Greece	~4x in a decade
Japan	3.31M in 2025, +21%
Iceland	~25% of visitors (2024)
Italy	4.2M in 2024, +11% in 2025

FASTEST GROWTH IN CANADIAN VISITORS

Portugal	~2.4x vs. 2018
Japan	~2.6x vs. 2018
Italy	+83% vs. 2018
France	+68% vs. 2018
Dominican Republic	+67% vs. 2018

US multiples for Portugal and Greece compare 2015 with 2025 (Wall Street Journal analysis of US government survey data); other US rows show recent levels and growth. Canadian figures compare 2018 with the latest year (Statistics Canada), so treat them as indicative. Sources: NTTO, JNTO, Statistics Canada, Iceland Tourist Board, national tourism agencies.

Future Partners

WEBINAR | IN PARTNERSHIP WITH MILES PARTNERSHIP

The State of the North American Traveler

Who American and Canadian outbound travelers are, where they want to go, and how they decide decide

Erin Francis-Cummings | President & CEO, Future Partners | October 27, 2026

Today's Agenda

- Right Now: How North American Travelers Feel
- Who They Are
- Where They're Dreaming of Going
- How They Plan, Book & Spend
- The Media & Channels That Reach Them

Two Studies, One Continent: How We Measured the North American Traveler Traveler

4,000+

American travelers surveyed every month in in The State of the American Traveler Study Study (SATS)

Weighted by region and generation

800

likely Canadian international travelers in SITS: The Canada Edition

Fielded Jan 5–15, 2026 via Dynata

12,800

international travelers across 16 origin markets markets for global benchmarks

800 completes per market

17,118

American Outbound Travelers: likely to travel outside the U.S. in the next 12 months

46.5% of 36,115 SATS respondents, respondents, Jan–Sep 2026

Canadian figures describe likely international travelers; American figures describe all U.S. travelers unless labeled American Outbound Travelers.

Source: Future Partners proprietary research, 2026

Defining the American Outbound Traveler: Nearly Half of U.S. Travelers Qualify Qualify

An American Outbound Traveler is an adult American who:

1. Has taken at least one trip of 50 miles or more from home in the past 12 months

   Every SATS respondent meets this test

2. Is likely or very likely to travel outside the United States for leisure in the next 12 months

   65.6% say very likely; 34.4% say likely

Canadian figures in this webinar describe the international travelers surveyed in SITS: The Canada Edition Canada Edition (n=800).

46.5%

of American travelers qualify as outbound travelers

17,118

American Outbound Travelers in the January–September 2026 SATS sample, out of 36,115 travelers

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

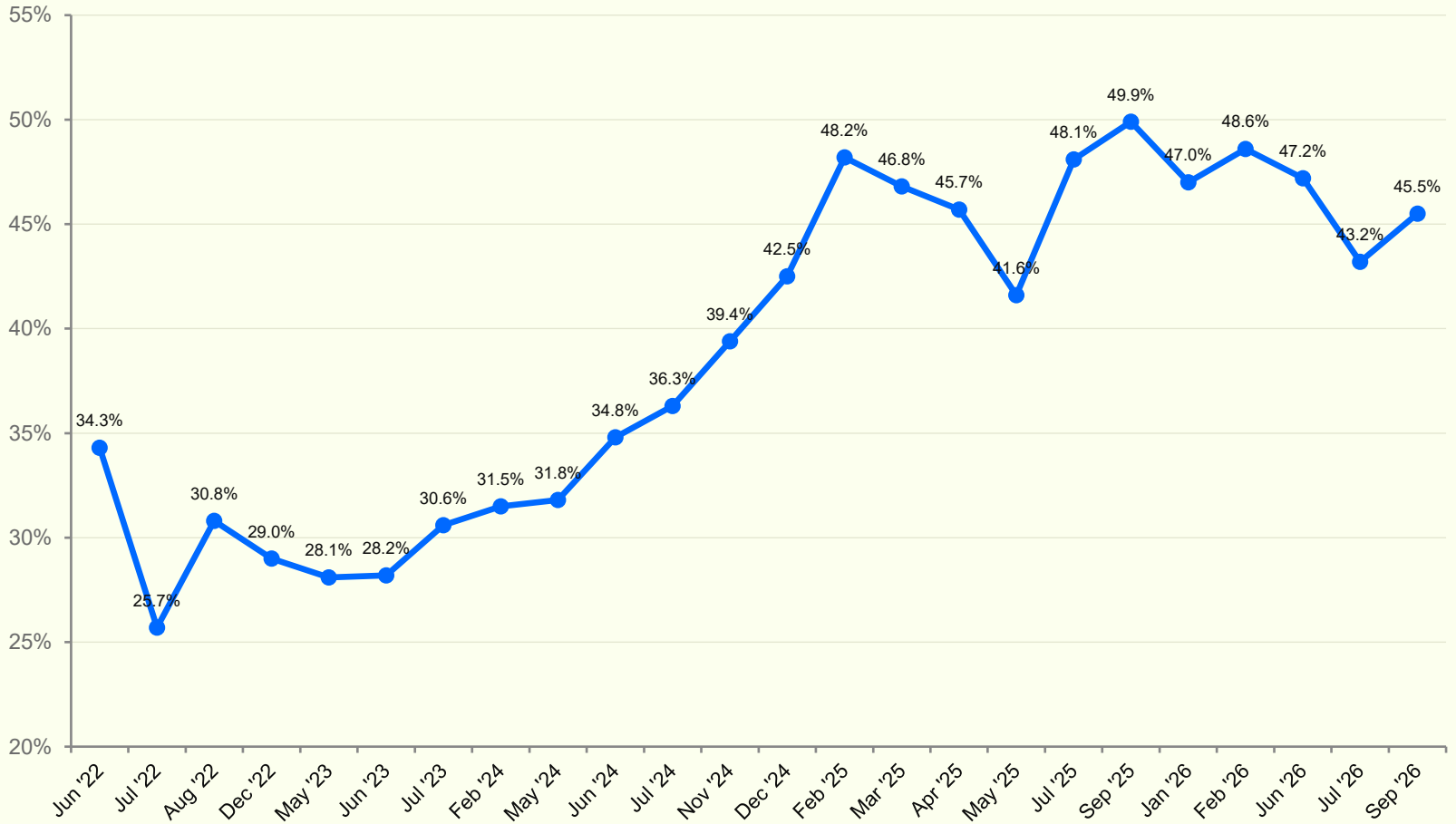
SECTION 1

Right Now: How North American Travelers Feel Travelers Feel

Future Partners

Intent to Go Abroad Rose From 32% to Nearly Half Since 2023

% likely to travel outside the U.S. for leisure in the next 12 months



ANNUAL AVERAGE

2023	**32.1%**
2024	**36.3%**
2025	**46.4%**
2026 YTD	**46.5%**

Intent has held near half of travelers since early 2025, even as broader economic sentiment has softened.

Source: Future Partners' The State of the American Traveler Study (SATS), monthly waves June 2022–September 2026 (n≈4,000 per wave). Readings shown for months with shown for months with published reports.

American Outbound Travelers Feel Better Off Than Other Americans, and Are Traveling at High Rates

44.4%

feel their household is better off financially than than a year ago

vs. 33.1% of all U.S. travelers

16.0%

feel their household is worse off than a year ago

vs. 24.8% of all U.S. travelers

47.8%

are being careful with money because of recession concerns

vs. 50.2% of all U.S. travelers

65.8%

took an overnight leisure trip in the past month

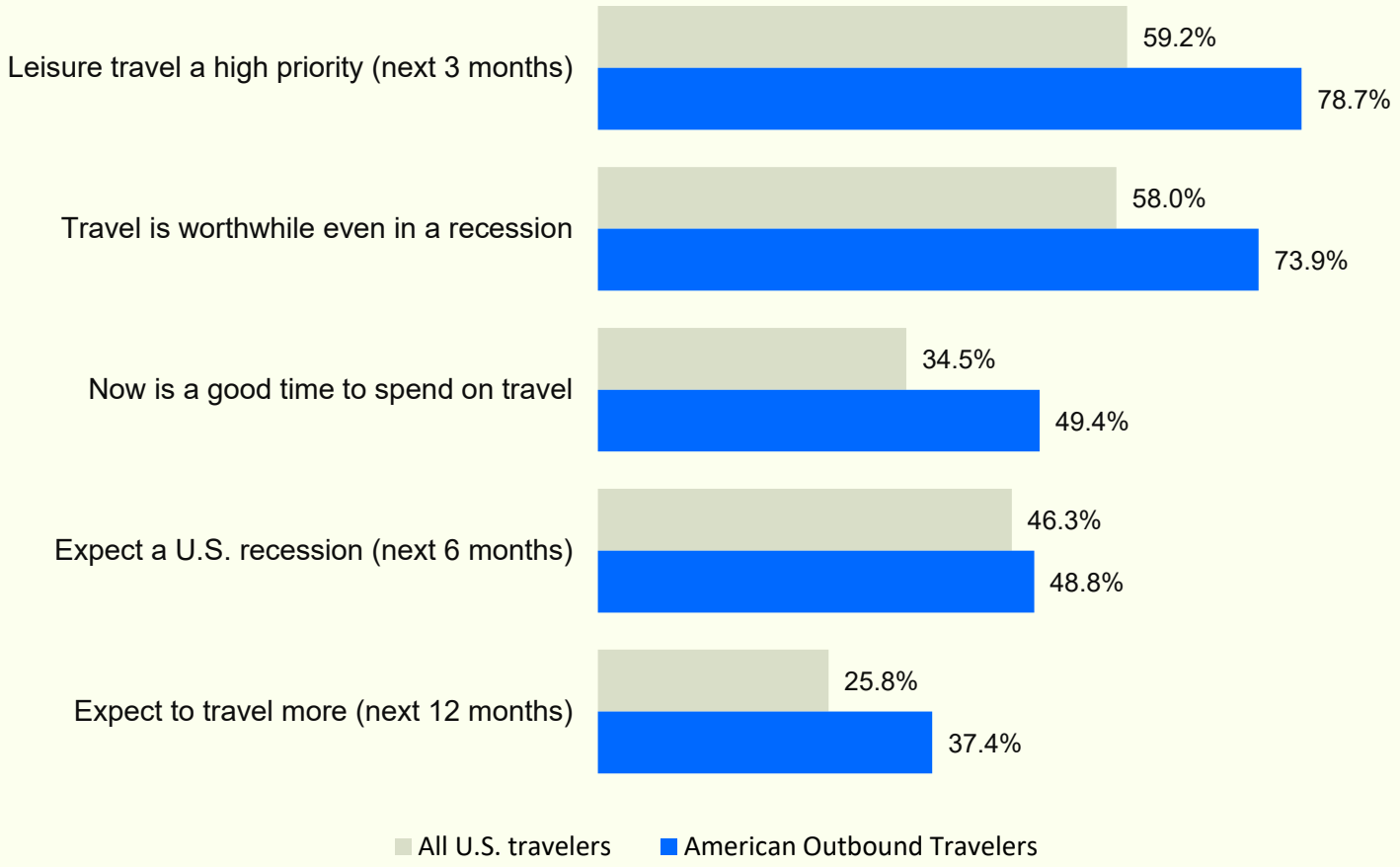
vs. 53.7% of all U.S. travelers

Outbound travelers are not immune to economic worry, but they feel more secure than travelers overall and are already on the road.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

American Outbound Travelers Expect a Recession as Much as Anyone, Yet 73.9% Yet 73.9% Call Travel a Worthwhile Investment

Travel sentiment, January–September 2026



+15.9 pts

Outbound travelers' lead on calling travel a worthwhile investment in a recession

Recession expectations are nearly identical (48.8% vs. 46.3%), but outbound travelers keep travel at the top of the budget. Their excitement about leisure travel averages 8.88 out of 10, vs. 8.19 for all travelers.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Six in Ten American Outbound Travelers Went Abroad in the Past Year Alone Alone

62.6%

traveled outside the U.S. in the past 12 months

vs. 33.4% of all U.S. travelers

37.4%

plan to go abroad without having done so in the past 12 months

A returning or first-time segment to win

43.1%

expect to spend more on leisure travel travel in the next 12 months

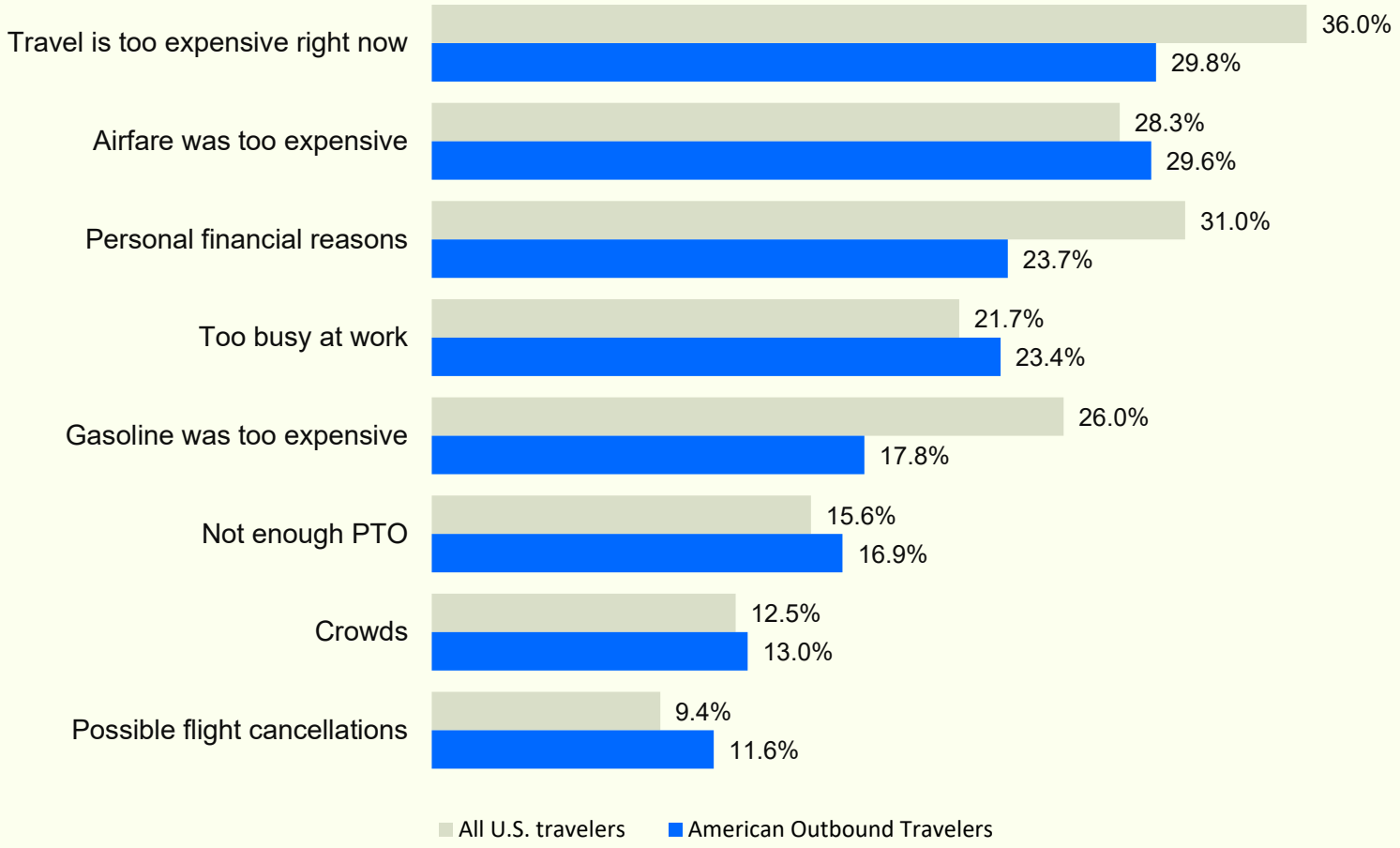
vs. 31.9% of all U.S. travelers

Most of this audience is already in the habit of international travel, and more of them plan to spend more on travel in the year ahead than travelers overall.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Airfare Is Now as Big a Barrier as Overall Cost for American Outbound Travelers; Travelers; Gas Matters Less

Kept them from traveling more in the past six months



29.6%

say airfare kept them from traveling more, the only cost barrier higher than for all travelers (28.3%)

SO WHAT

DMOs

Lead with value without discounting: bundles, free experiences, points partners.

Tour Operators

Sell price certainty. Inclusive pricing removes cost and and airfare anxiety.

Airlines

Airfare rivals overall cost as a barrier. Promote award seats award seats and fare sales.

Hotels

Value-seekers lean on points. Make rewards easy to earn and redeem.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Canadian International Travelers Are Ready to Go: Nearly Three-Quarters Plan to Travel Abroad in the Next Year

72.6%

are likely to travel internationally in the next next 12 months

Canada Edition 2026

30.1%

expect to spend more on international travel in the next 12 months

vs. 38.7% across all 16 markets

29.0%

expect to take more international trips than last year

vs. 38.2% across all 16 markets

$5,125

average annual international travel budget (USD)

vs. $4,679 across all 16 markets

Canadians budget more than the global average, but fewer plan to grow their international travel. 34.1% call it a high spending priority, vs. 39.3% across 16 markets.

Source: SITS 2026: Canada Edition (n=800) and 16-market aggregate (n=12,800), Jan 5–15, 2026

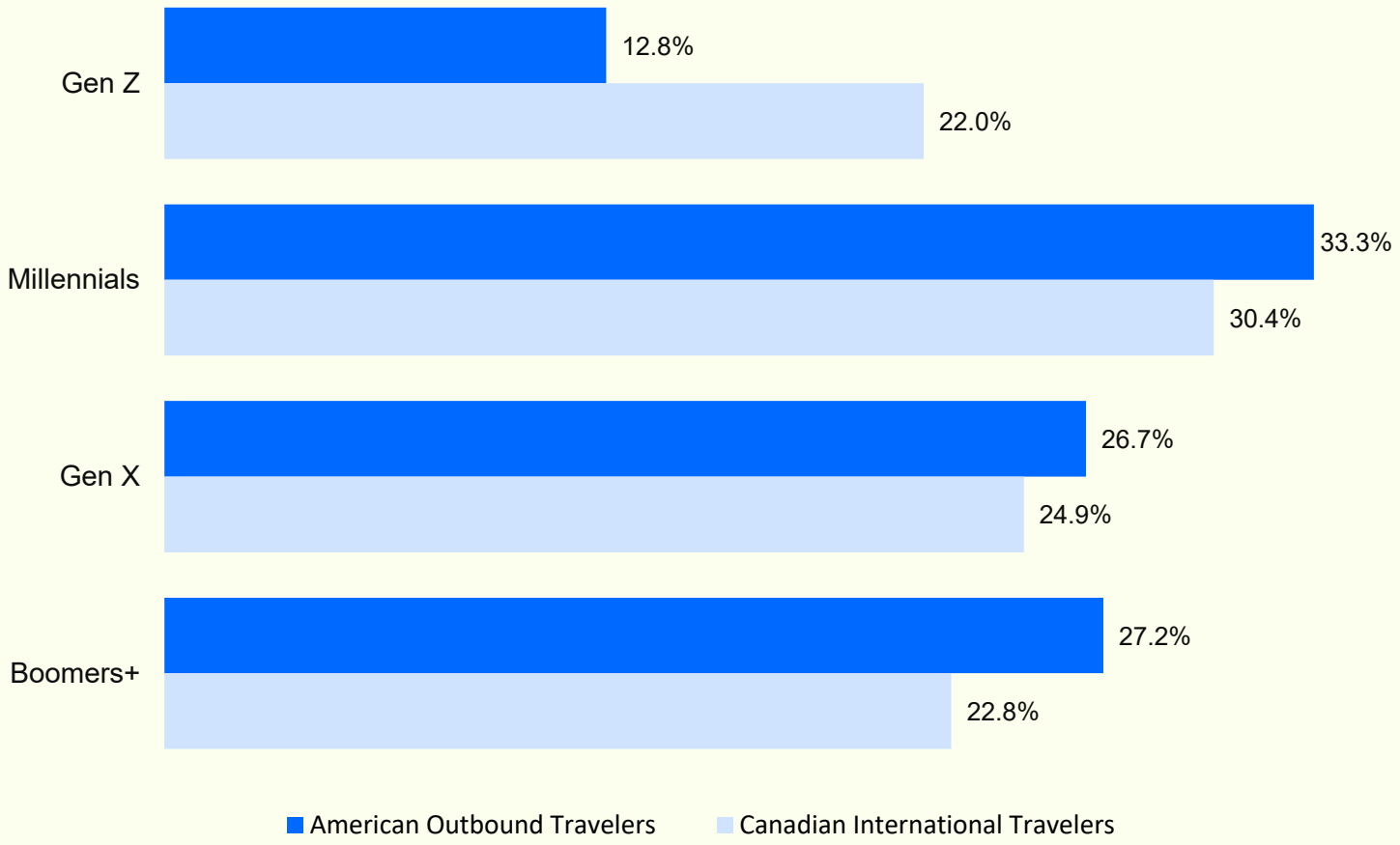
SECTION 2

Who They Are

Future Partners

Millennials Are the Largest Generation of Outbound Travelers in Both Countries

Generational profile of outbound travelers



22.0%

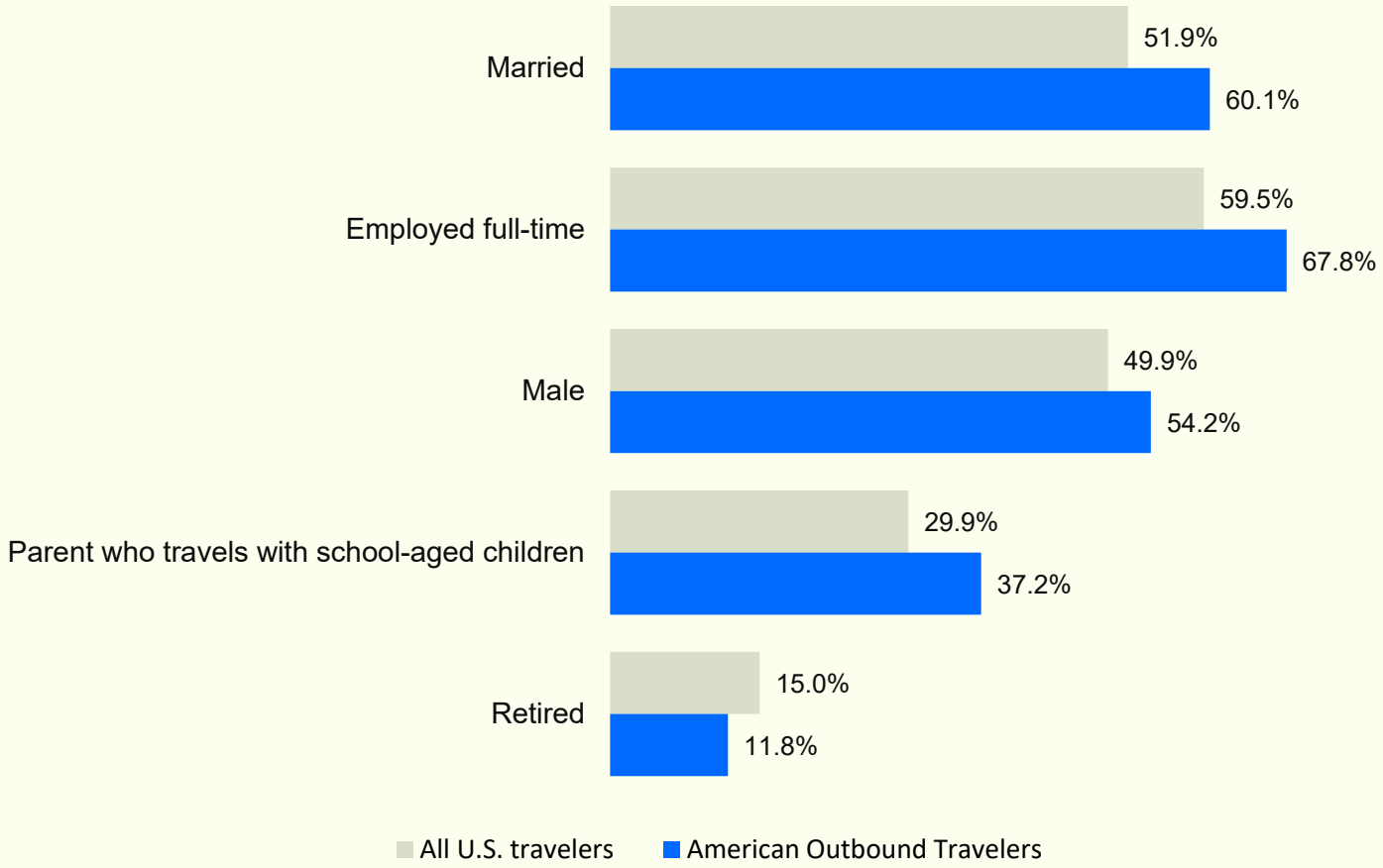
of Canadian international travelers are Gen Z, vs. 12.8% of American Outbound Travelers

Canada skews younger: Canadians average 46.0 years old; American Outbound Travelers average 48.6. SITS defines Gen Z as 29 or younger, so read this as a broad comparison.

Source: SATS, Jan–Sep 2026 (American Outbound Travelers, n=17,118); SITS: Canada Edition 2026 (n=800)

American Outbound Travelers Are More Likely to Be Married, Employed Full-Time Full-Time and Traveling With Kids

Demographic profile



+8.3 pts

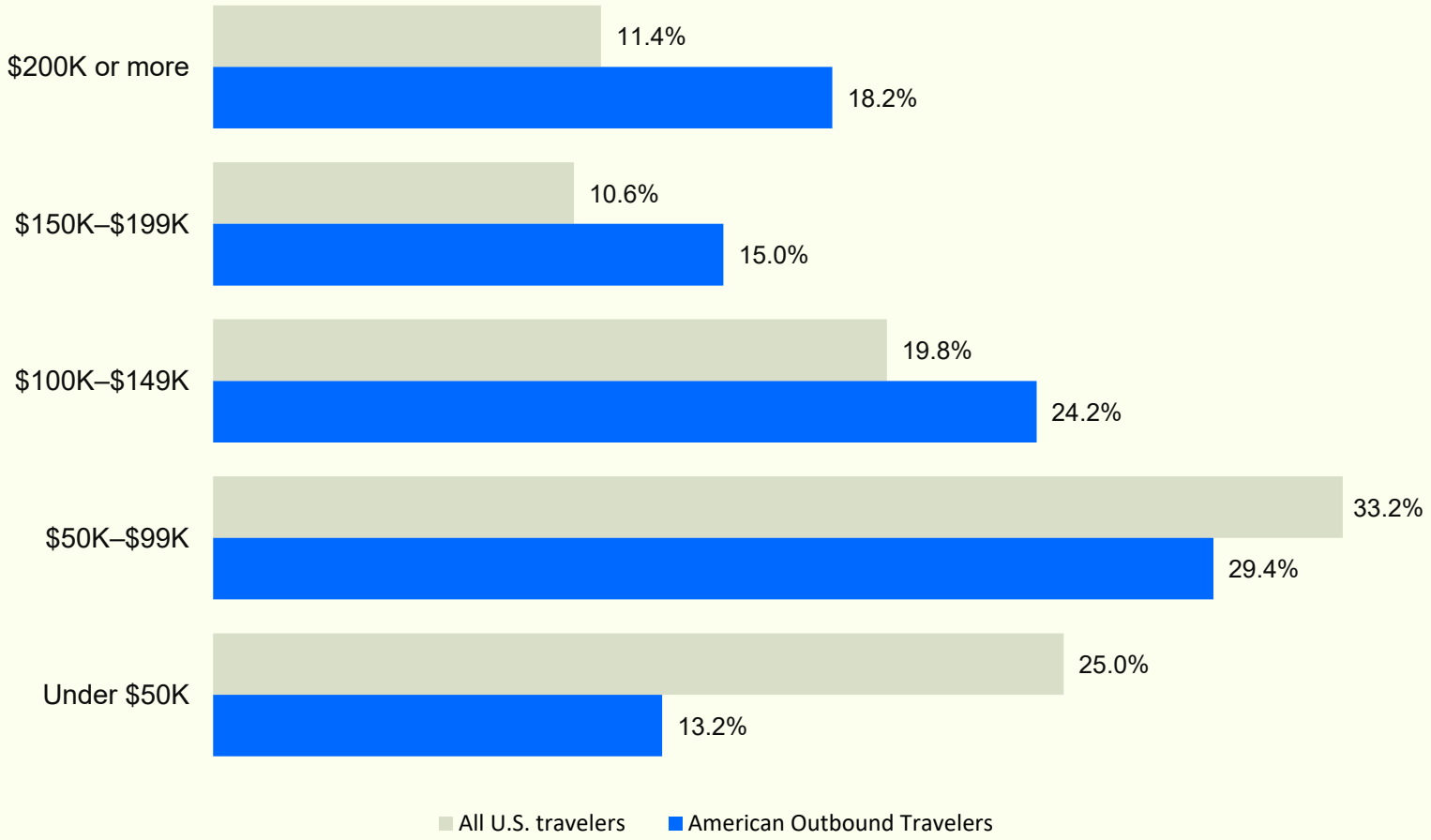
outbound travelers' lead in full-time employment (67.8% vs. 59.5%)

Outbound travelers are prime-working-age households: only 11.8% are retired, vs. 15.0% of all U.S. travelers.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

American Outbound Travelers Skew Affluent

Household income



$140,769

mean household income, vs. $112,117 for all U.S. travelers travelers

SO WHAT

DMOs

Lead with experience over discounts; this audience can afford the trip it wants.

Tour Operators

Premium and small-group product fits: a third earn $150K or $150K or more.

Airlines

Premium demand is intact. Protect premium cabins for this for this traveler.

Hotels

Hold rate at the top; upsell suites, spa and dining packages.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

American Outbound Travelers Budget 51% More for Leisure Travel and Take More Trips

$9,074

maximum leisure travel travel spend in the next next 12 months

vs. $5,994 for all U.S. travelers

18.4

leisure travel days available in the next 12 months

vs. 15.7 days for all U.S. travelers

4.5

leisure trips expected in in the next 12 months

vs. 3.8 trips for all U.S. travelers

84.7%

flew on a commercial airline in the past 12 months

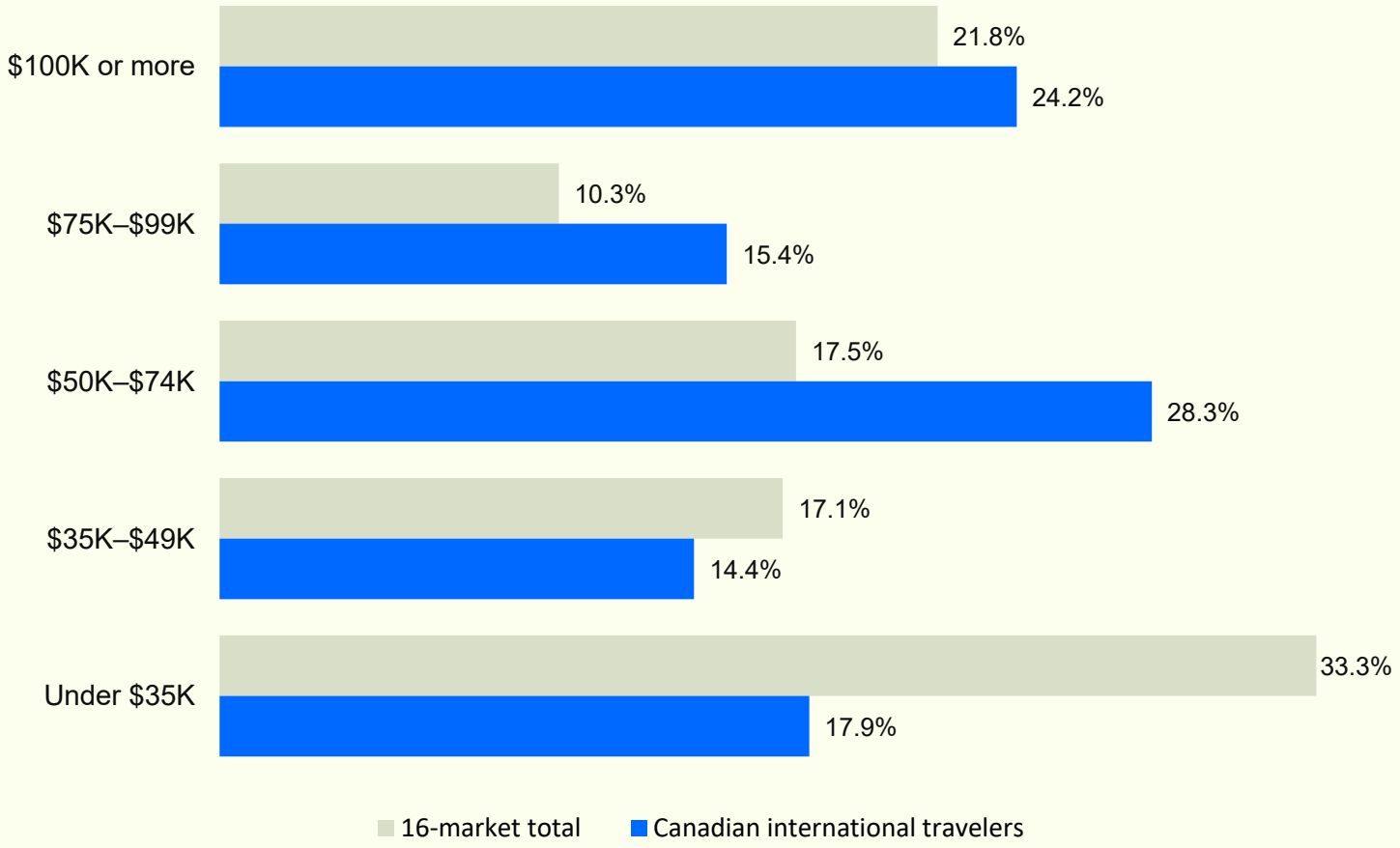
vs. 64.7% of all U.S. travelers

Outbound travelers have more time, take more trips and fly more, not just spend more.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Canadian International Travelers Have Income and Time for Travel

Household income, converted to USD



67.9%

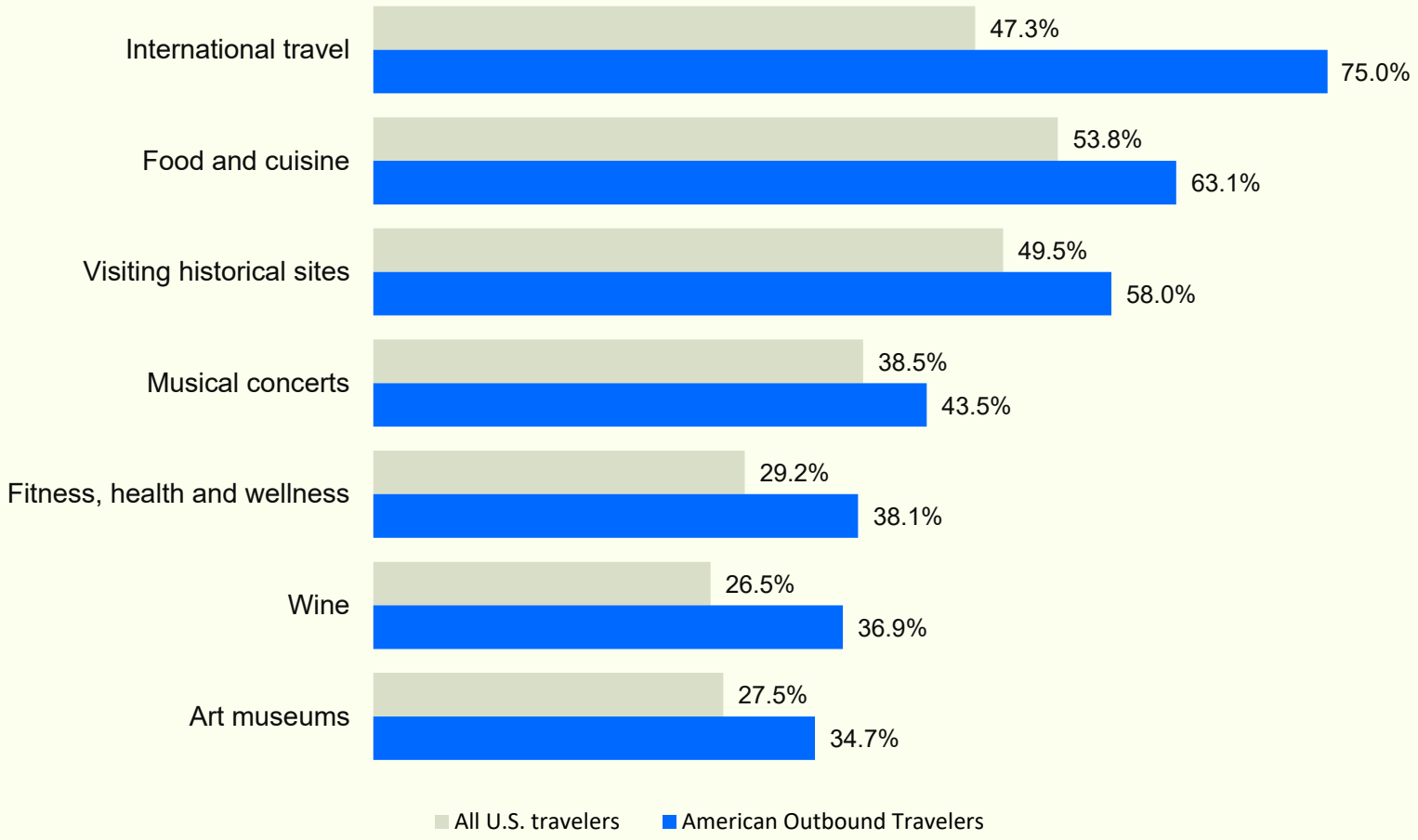
earn $50,000 or more (USD), vs. 49.6% across all 16 all 16 markets

Canadian international travelers are a solid middle- to upper-middle-income market. Their mean income ($77,200 USD) matches the 16-market average ($78,147) because fewer sit at the very top (2.1% earn $200K+ vs. 9.0%). They are 51.6% female, average 46.0 years old (vs. 44.7), and 22.8% are 62 or older (vs. 18.5%). They report 20.4 days available for international travel alone.

Source: SITS 2026: Canada Edition (n=800) and 16-market aggregate (n=12,800), Jan 5–15, 2026

International Travel Is the Top Passion for American Outbound Travelers, Followed Travelers, Followed by Food & History

Passions and hobbies with extremely high interest



75.0%

of American Outbound Travelers rate international travel an extreme passion, vs. 47.3% of all U.S. travelers

SO WHAT

DMOs

Lead with food and heritage, the top passions after travel itself. Culinary trails and historic districts sell.

Tour Operators

Wine and wellness show the biggest lifts. Build small-group wine and wellness trips.

Airlines

Co-market routes with destinations on culinary and cultural cultural stories.

Hotels

Package dining, spa and culture. 48.8% of Canadians travel to treat themselves.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Three in Four American Outbound Travelers Want Their Trips to Support Their Well-Being

76.4%

say it is very or extremely extremely important that that trips support their well-being

vs. 67.5% of all U.S. travelers

55.9%

often or always plan leisure trips specifically to support their well-being

vs. 44.0% of all U.S. travelers

18.2%

always plan trips with well-being as the purpose purpose

vs. 14.1% of all U.S. travelers

79.5%

of Americans likely to visit Canada say well-being matters in their trips

Americans likely to visit Canada, Canada, n=4,770

Wellness is a mainstream travel motivation for this audience, not a niche, and it lines up with the 38.1% who are passionate about fitness and wellness.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Outbound Travelers Fly, Travel Solo & With the Whole Family, and Favor the Off-the Off-Season

61.8%

prefer air travel to road trips for leisure

vs. 43.3% of all U.S. travelers; only 13.3% prefer road trips

54.5%

are interested in multigenerational trips with at least three generations

vs. 46.0% of all U.S. travelers

39.2%

took a solo leisure trip in in the past 12 months

vs. 33.4% of all U.S. travelers

39.2%

prefer to travel in shoulder or off-seasons

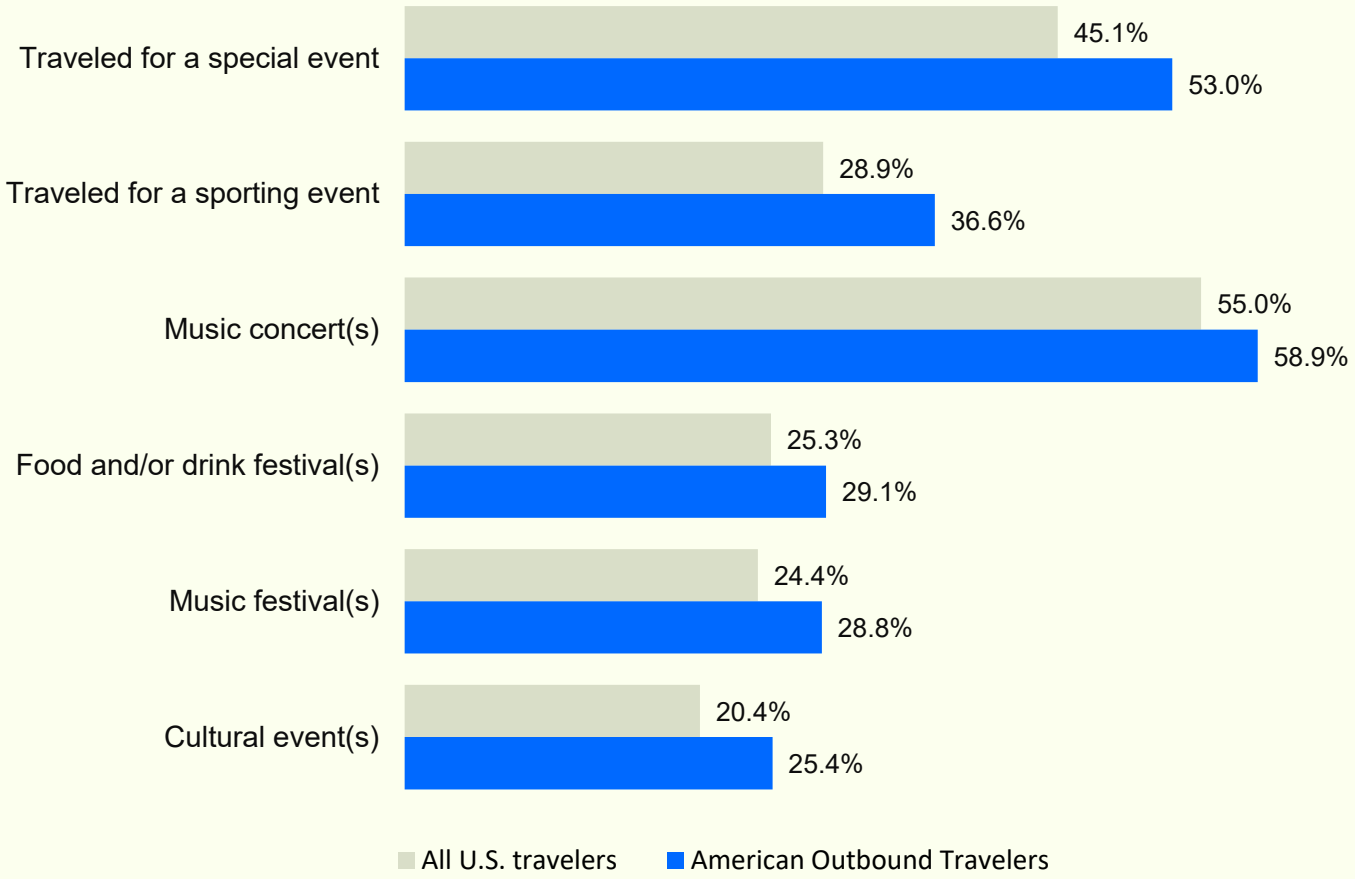
vs. 21.1% who prefer peak seasons seasons

The same audience shows up in very different travel parties, so product and messaging need to flex from solo to multigenerational.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

More Than Half of American Outbound Travelers Traveled Specifically for an Event, for an Event, and Over a Third for Sports

Traveled specifically for an event in the past 12 months; types of events attended



28.6%

of event travelers likely to visit Canada attended a cultural event

Event types are among those who traveled for an an event. Among Americans likely to visit Canada, Canada, cultural events show the biggest lift: 28.6% 28.6% vs. 20.4% of all event travelers. Professional Professional sports account for 74.3% of outbound outbound travelers' sports trips.

Source: SATS, Jan–Sep 2026. Outbound n=17,118, all n=36,115; event types among event travelers (outbound n=9,195)

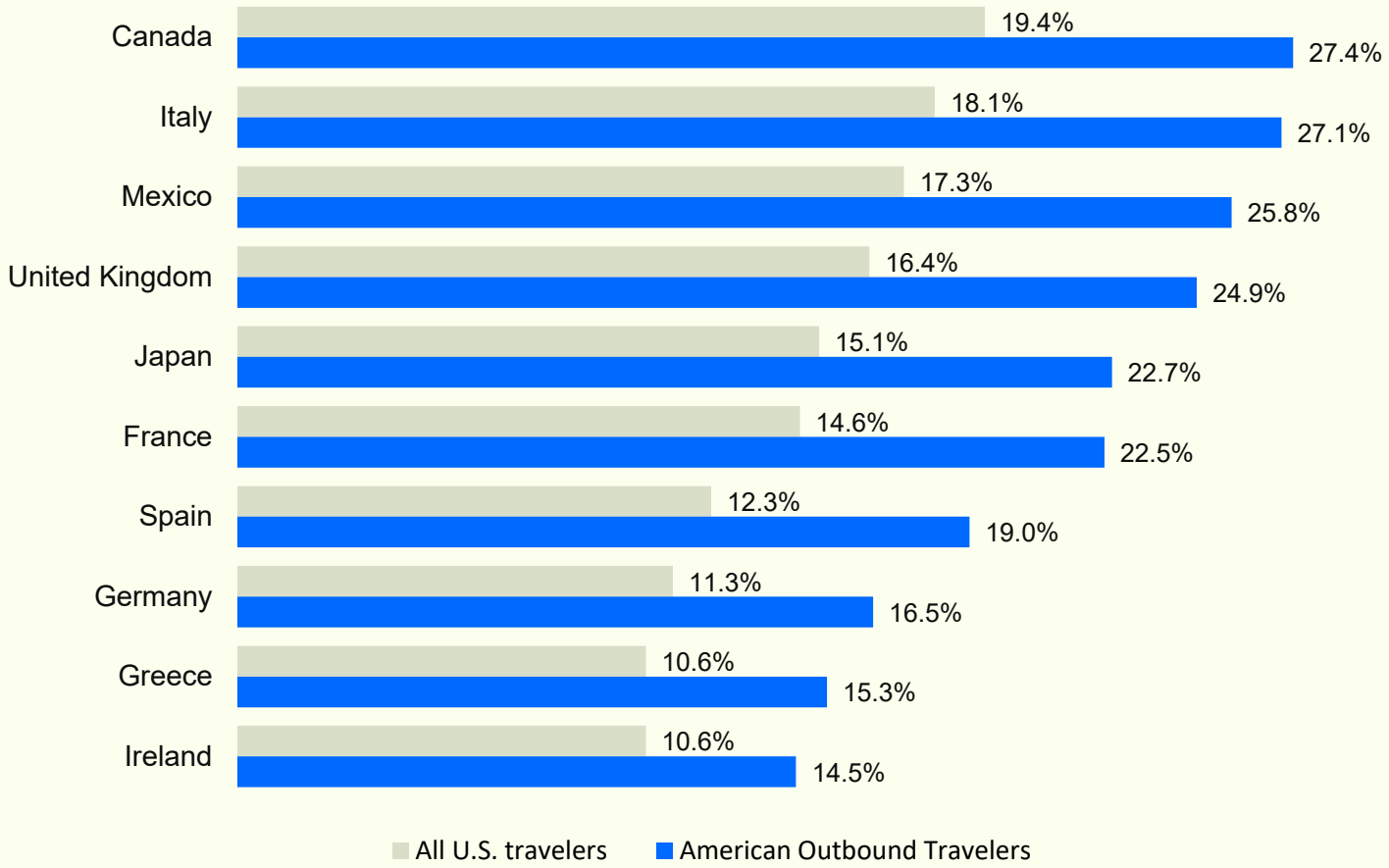
SECTION 3

Where They're Dreaming of Going

Future Partners

Canada and Italy Lead the Countries American Outbound Travelers Want to Visit Want to Visit Next

Countries likely to visit in the next two years (aided)



27.4%

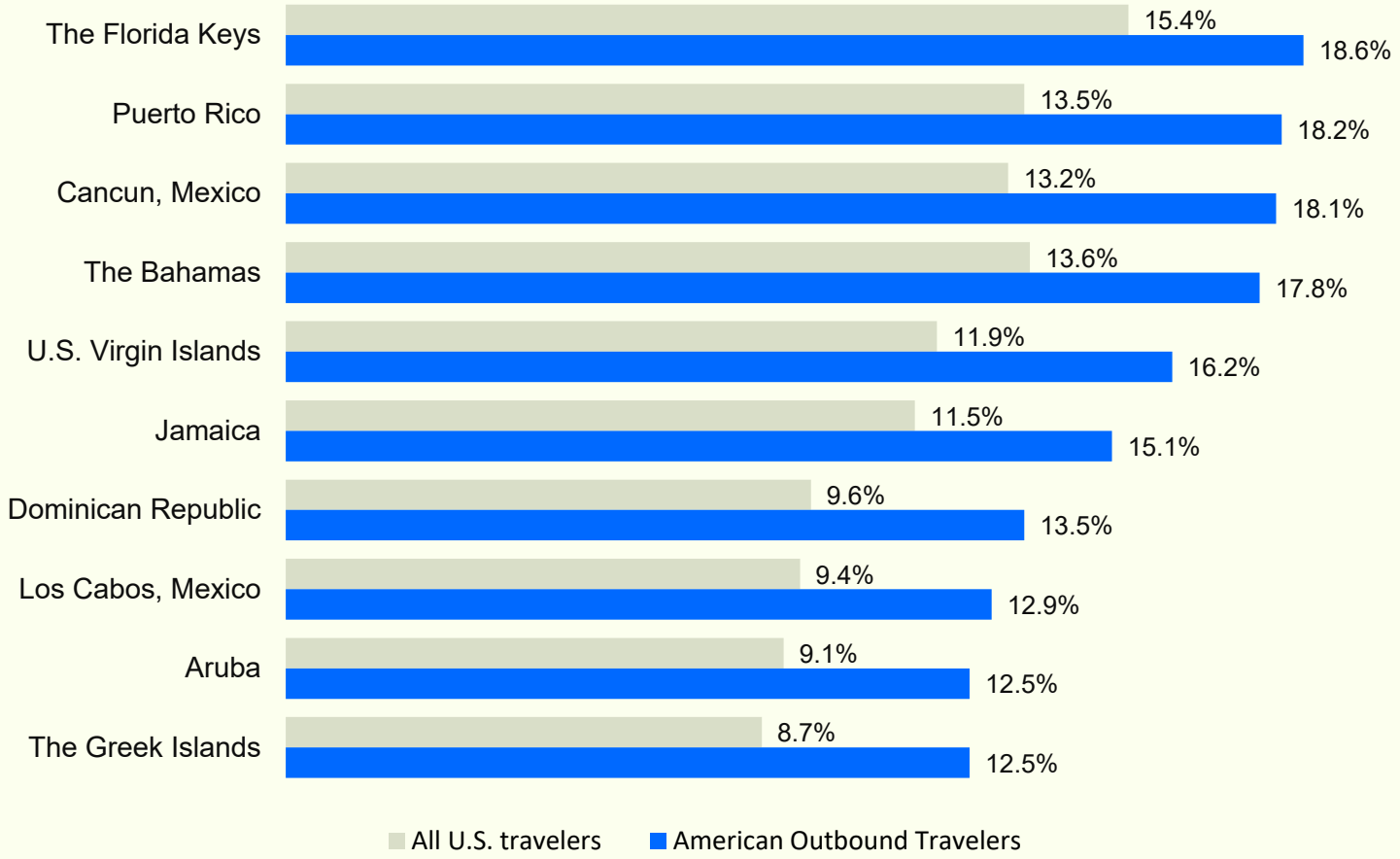
of American Outbound Travelers are likely to visit visit Canada in the next two years

Proximity markets hold their own against Europe: Europe: Canada and Mexico sit alongside Italy and and the U.K. at the top. Japan is the clear Asia leader leader at 22.7%, ahead of Australia (13.1%) and and Thailand (11.7%).

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Close-to-Home Islands Lead the American Outbound Beach Wish List

Islands and beach destinations likely to visit in the next two years



9 of 10

top beach destinations are in North America or the Caribbean

Nine of the top ten are in the Caribbean or Mexico, Mexico, or are U.S. territory. Only the Greek Islands Islands crack the list from farther afield. Easy access access and short flights win the beach trip.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Canada-Bound Travelers Have the Biggest Budgets; Middle East–Bound Travelers Travelers Have the Most Momentum

American Outbound Travelers by region they are likely to visit

	All Outbound	Island / Beach	Caribbean	Canada	Latin America America	Asia	Middle East & N. Africa
Share of outbound travelers	100.0%	65.0%	42.0%	27.9%	42.3%	39.7%	22.2%
Max travel budget (next 12 mo.)	$9,074	$9,477	$9,357	**$10,328**	$9,737	$9,928	$9,585
Plan to spend $10,000+	37.8%	39.8%	39.1%	**45.2%**	41.1%	42.1%	38.6%
Expect to travel more	37.4%	40.9%	**43.3%**	38.3%	40.7%	**43.0%**	**48.4%**
Expect to spend more	43.1%	45.7%	46.5%	45.8%	45.8%	47.0%	**50.7%**

25%+ above all outbound 12–24% above 3–11% above

SO WHAT

Island & beach

The broadest market: 65.0% of outbound travelers. Volume play.

Canada

Fewer travelers, deepest pockets: 45.2% plan 45.2% plan to spend $10K+.

Asia & Middle East

Growth markets: 43.0% and 48.4% expect to travel more.

Source: SATS, January–September 2026. American Outbound Travelers likely to visit each region (segments overlap): Island/Beach n=11,124; Latin America n=7,242; Caribbean n=7,185; Asia n=6,795; Canada n=4,770; Middle East & North Africa n=3,799

Passions Differ by Destination: Canada Draws Culture and Hiking, the Caribbean Shopping and Sailing, and Asia Pop Culture

Passions and hobbies with extremely high interest, by region likely to visit

	All Outbound	Island / Beach	Caribbean	Canada	Latin America America	Asia	Middle East & N. Africa
Food and cuisine	63.1%	66.7%	67.4%	66.7%	67.3%	69.3%	69.7%
Visiting historical sites	58.0%	58.7%	57.8%	**65.2%**	60.5%	62.3%	63.9%
Art museums	34.7%	36.2%	36.8%	**39.7%**	38.3%	**41.7%**	**45.2%**
Theater or plays	34.4%	37.0%	38.2%	**39.0%**	38.0%	38.1%	**41.9%**
Day hiking	33.5%	35.2%	34.6%	**38.3%**	37.0%	**38.9%**	**39.7%**
Shopping	42.3%	47.1%	**50.4%**	42.2%	45.1%	**47.7%**	**54.4%**
Sailing or boating	21.1%	**25.7%**	**28.3%**	20.4%	**25.6%**	**24.5%**	**29.9%**
Fitness, health and wellness	38.1%	42.4%	**45.1%**	38.9%	42.5%	**45.2%**	**51.4%**
Fashion	27.9%	**32.4%**	**36.5%**	27.5%	**32.1%**	**34.8%**	**43.8%**
Photography	26.8%	**30.2%**	**32.5%**	**30.2%**	**30.7%**	**33.7%**	**40.8%**
Asian pop culture	13.5%	**15.7%**	**16.8%**	13.3%	**15.5%**	**20.8%**	**22.3%**

25%+ above all outbound 12–24% above 3–11% above

SO WHAT

Canada

Lead with history, museums, theater and and trails. Shopping doesn't over-index. index.

Caribbean

Shopping (50.4%) and sailing (28.3%) sell sell alongside the beach.

Asia

Pop culture (20.8%) and photography are the hooks for this traveler.

Middle East

The most engaged group: fashion (43.8%) and wellness (51.4%) lead.

Source: SATS, January–September 2026. American Outbound Travelers likely to visit each region (segments overlap): Island/Beach n=11,124; Latin America n=7,242; America n=7,242; Caribbean n=7,185; Asia n=6,795; Canada n=4,770; Middle East & North Africa n=3,799

Sources That Inspire Them Depend on Where They're Headed: Search and Print for Canada, Instagram for Asia and the Middle East

Where they are most receptive to learning about new destinations, by region likely to visit

	All Outbound	Island / Beach	Caribbean	Canada	Latin America America	Asia	Middle East & N. Africa
Websites found via search	37.3%	37.9%	36.8%	**44.8%**	39.6%	38.8%	36.5%
Email	34.2%	36.1%	37.7%	36.8%	36.6%	36.1%	**39.2%**
Instagram	33.1%	**37.4%**	**39.4%**	35.6%	**39.9%**	**41.4%**	**45.2%**
Facebook	31.2%	**36.1%**	**38.9%**	30.8%	**36.1%**	34.6%	**42.6%**
Online articles and blogs	29.5%	30.6%	29.8%	**37.2%**	**33.5%**	**34.8%**	32.2%
Streaming video services	23.6%	25.3%	26.1%	**28.5%**	**27.3%**	**29.8%**	**29.3%**
TikTok	19.7%	**23.4%**	**25.9%**	19.7%	**24.4%**	**24.0%**	**29.1%**
Review websites	19.5%	20.2%	19.9%	**24.9%**	21.6%	**23.4%**	21.0%
Printed travel magazines	15.6%	17.1%	17.0%	**20.1%**	**17.7%**	**18.6%**	**19.5%**
Travel podcasts	14.9%	**17.3%**	**18.8%**	**17.8%**	**18.4%**	**19.0%**	**23.4%**
Printed official visitor guides	8.7%	8.8%	8.8%	**13.0%**	9.2%	**9.9%**	9.6%

25%+ above all outbound 12–24% above 3–11% above

SO WHAT

Canada

Search, articles, reviews and print. Visitor guides still work (13.0%).

Caribbean

Social-first: Facebook (38.9%), Instagram and TikTok over-index.

Asia

Instagram (41.4%) and streaming video (29.8%) inspire the trip.

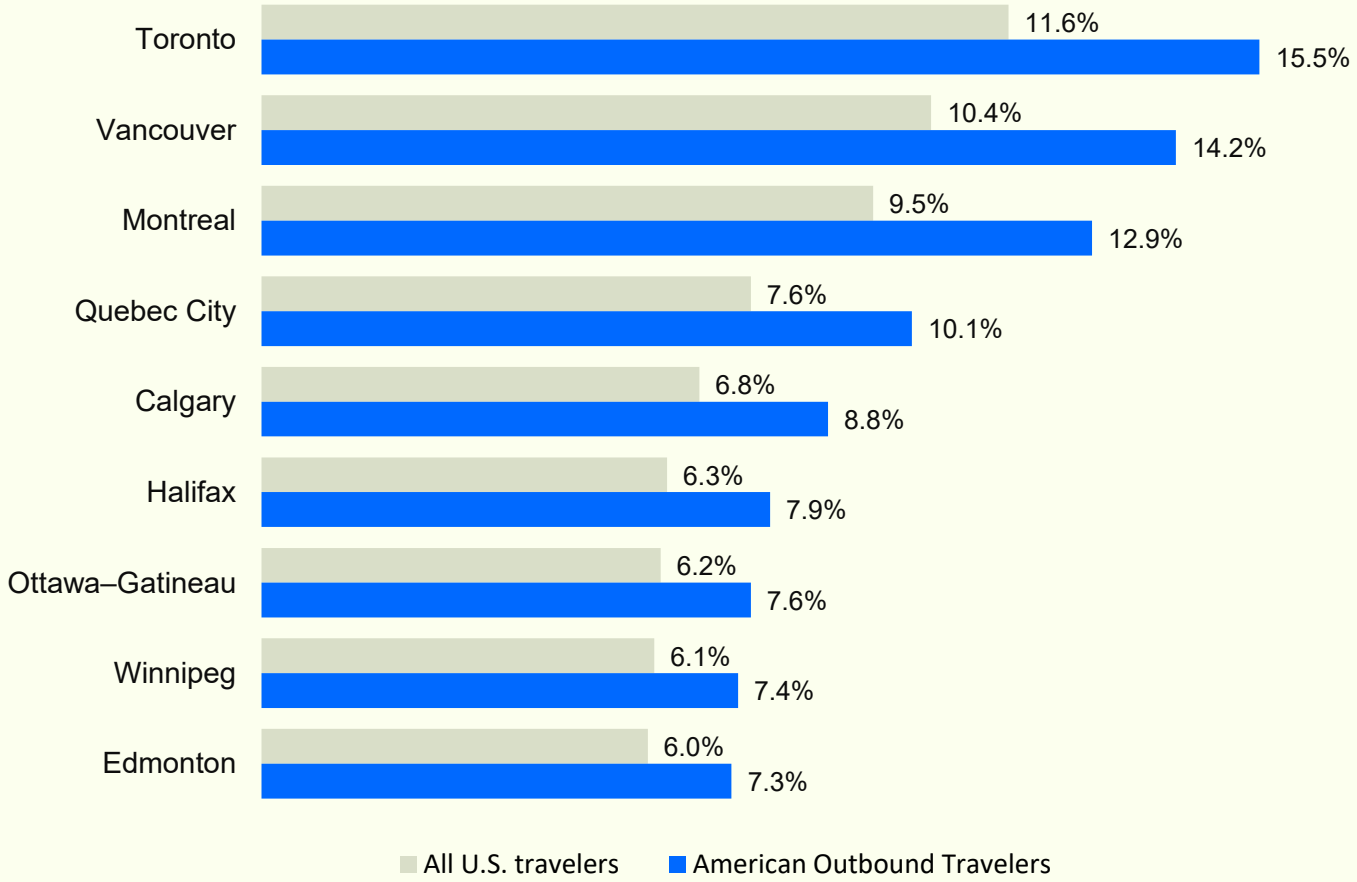
Middle East

Instagram (45.2%), Facebook and podcasts reach them best.

Source: SATS, January–September 2026. American Outbound Travelers likely to visit each region (segments overlap): Island/Beach n=11,124; Latin America n=7,242; America n=7,242; Caribbean n=7,185; Asia n=6,795; Canada n=4,770; Middle East & North Africa n=3,799

Toronto, Vancouver and Montreal Lead Canada's City Appeal for American American Outbound Travelers

Canadian destinations likely to visit in the next 12 months



36.8%

of Americans likely to visit Canada plan to see Toronto in the next 12 months

Among Americans already likely to visit Canada Canada (n=4,770), intent rises to 36.8% for Toronto, Toronto, 34.1% for Vancouver and 30.2% for Montreal. Quebec City (22.0%) is the strongest of the strongest of the secondary cities.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Americans Likely to Visit Canada Are Among the Highest-Spending Outbound Outbound Segments We Track

$10,328

maximum leisure travel spend in the next 12 months

Highest of the seven outbound segments in SATS

5.1

leisure trips expected in the next 12 months

45.2% plan to spend $10,000 or more

65.2%

are passionate about visiting historical sites and and attractions

vs. 49.5% of all U.S. travelers

44.8%

are most receptive to destination messages on websites found via search

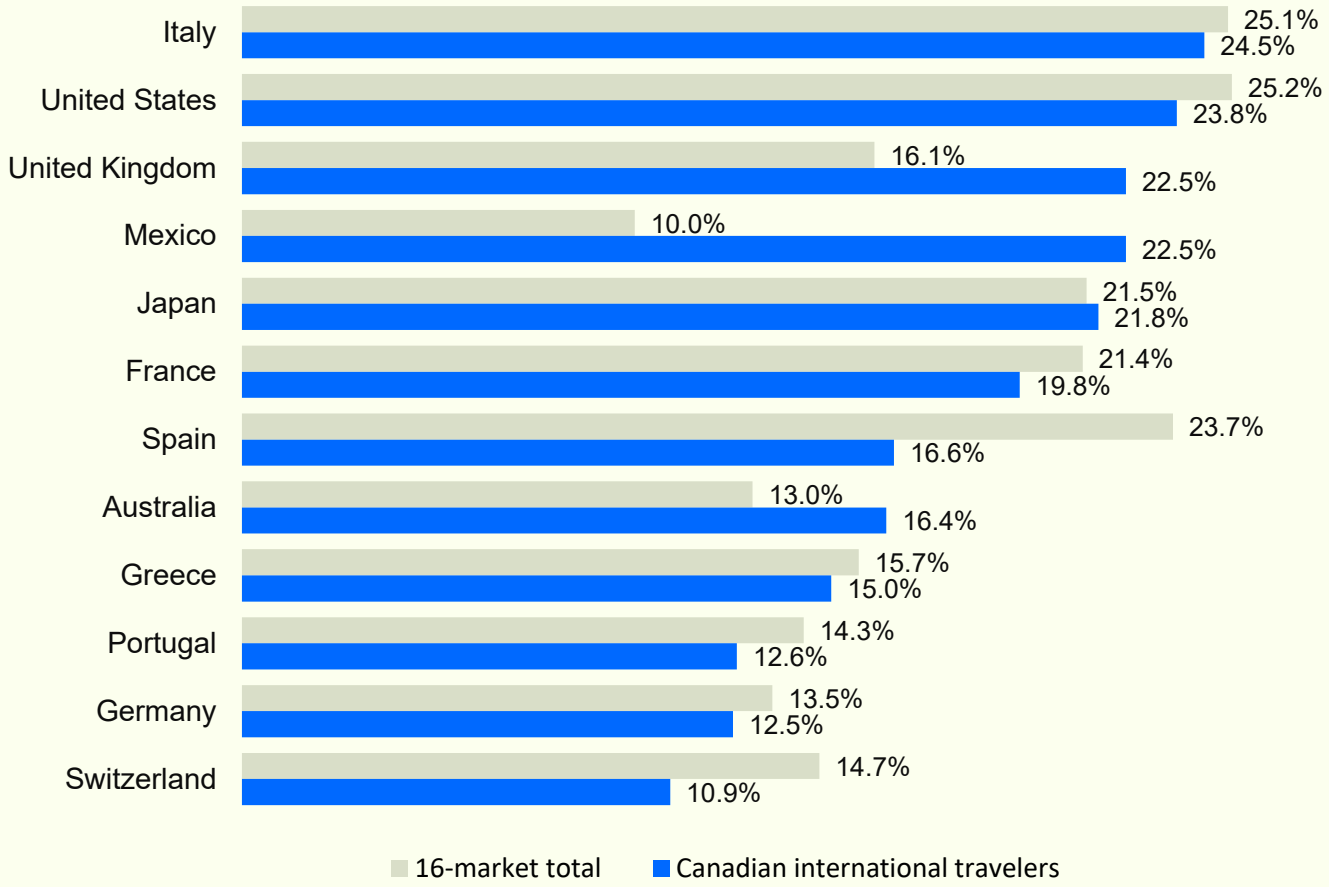
13.0% receptive to printed visitor visitor guides, vs. 8.7% overall

This segment skews a bit older than other outbound travelers: 29.6% are Boomers or older, with a mean age of 49.7.

Source: SATS, January–September 2026. American travelers likely to visit Canada in the next two years (n=4,770)

Canadians Over-Index for Mexico, the U.K. and Australia

Foreign countries most like to visit in the next year (aided)



+12.5 pts

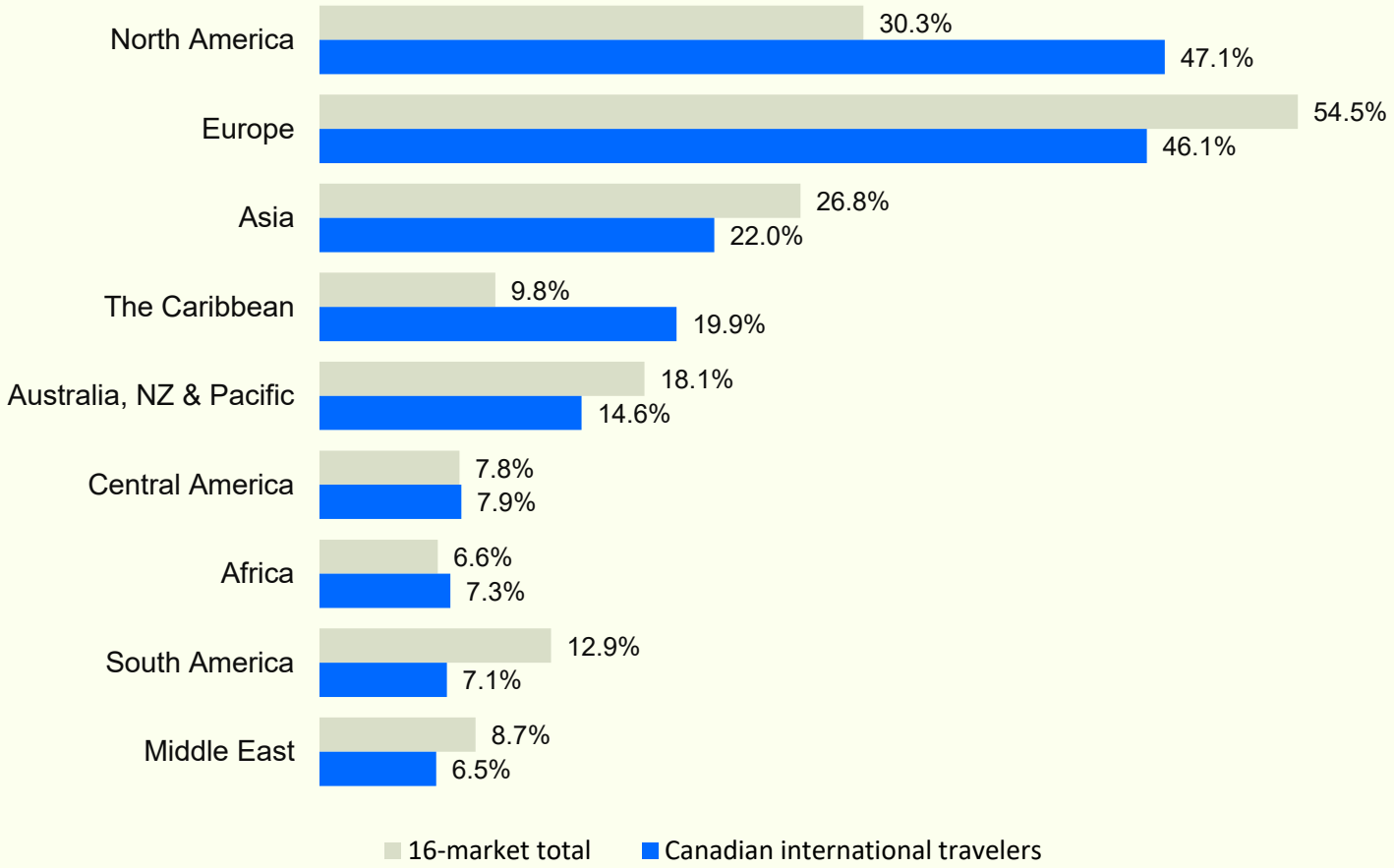
Mexico's lead with Canadians vs. the 16-market total (22.5% vs. 10.0%)

The Canadian wish list is broad: five countries sit between 21.8% and 24.5%. Mexico draws more than twice the global rate, and the U.K. and Australia also over-index. Spain and Switzerland under-index. 68.4% of Canadian international travelers took at least one international leisure trip in the past 12 months.

Source: SITS 2026: Canada Edition (n=800) and 16-market aggregate (n=12,800), Jan 5–15, 2026

Close to Home and in the Sun: Canadians Are Twice as Likely as Other Markets to Markets to Head for the Caribbean

Regions likely to visit in the next 12 months



2.0x

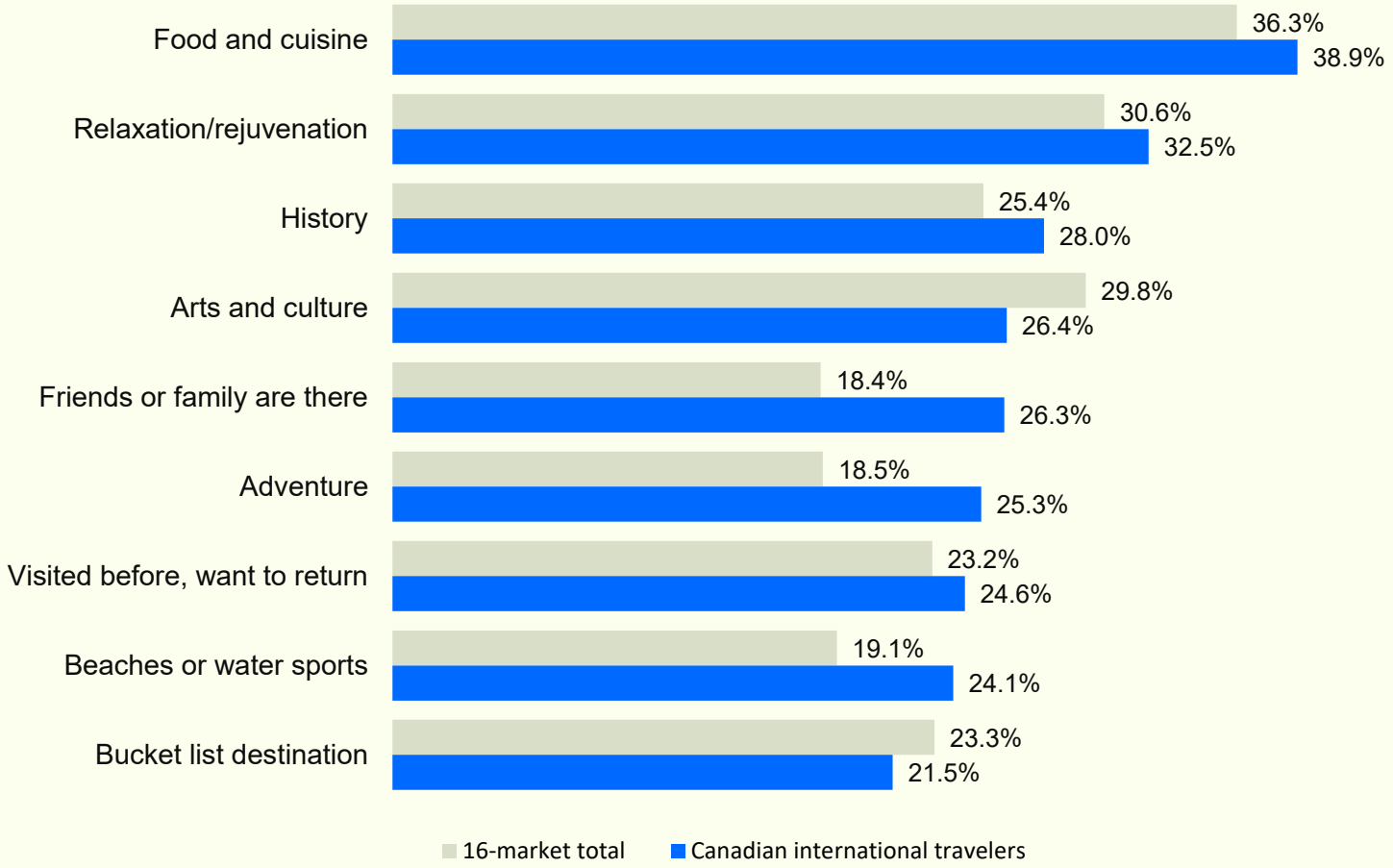
Canadians' Caribbean intent vs. the 16-market total (19.9% vs. 9.8%)

North America (the U.S. and Mexico for Canadians) edges out Europe as the top region. Europe still draws nearly half, though 8.4 pts below the global rate. Sun destinations close to home are where Canadians stand apart.

Source: SITS 2026: Canada Edition (n=800) and 16-market aggregate (n=12,800), Jan 5–15, 2026

Food, Relaxation and History Drive Canadians' Choice; Family Ties and Adventure Over-Index

Reasons for wanting to visit their top-choice country



36.1%

of Canadians whose top pick is the U.S. cite friends or family there, tied with relaxation (n=155)

SO WHAT

DMOs

Lead with food and history. Rivals of the U.S.: sell novelty novelty over a return visit.

Tour Operators

Adventure (+6.8 pts) and beaches (+5.0) over-index. Package active and sun trips.

Airlines

VFR runs high (26.3% vs. 18.4%). Diaspora routes are a a durable base.

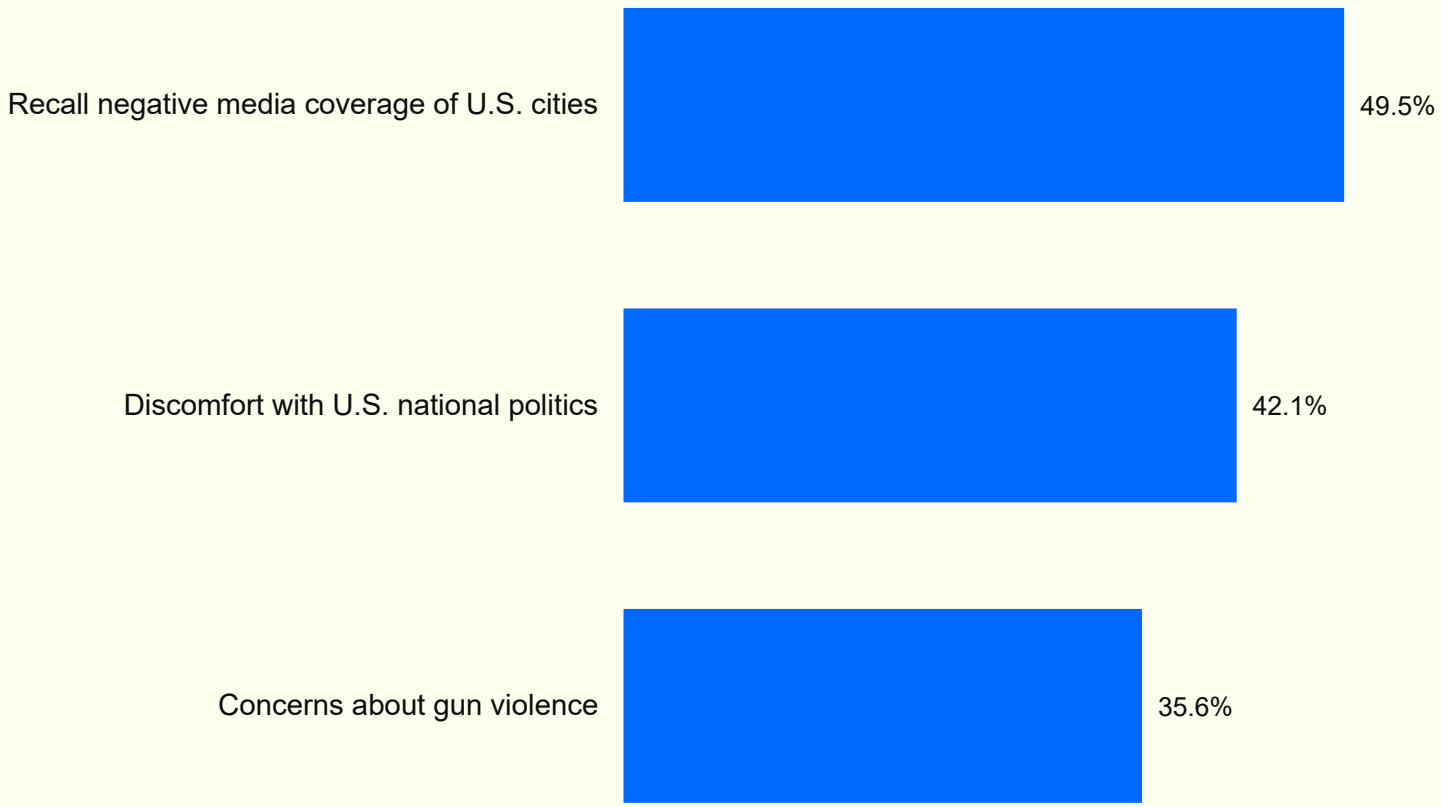
Hotels

Relaxation is the No. 2 reason. Lead with rest and rejuvenation.

Source: SITS 2026: Canada Edition (n=800) and 16-market aggregate (n=12,800), Jan 5–15, 2026

Perception, Not Price, Holds Canadians Back From the U.S., Opening the Door for Rivals

Canadian international travelers: U.S. perception barriers



71.0%

still expect to visit the U.S. in the next two years, down 13.2 pts

SO WHAT

DMOs

Rivals: hesitant Canadians are in play. U.S. DMOs: lead with welcome.

Tour Operators

Offer Mexico, Caribbean and Europe; guided U.S. trips lower perceived risk.

Airlines

Sun and Europe routes gain; flexible fares protect cross-cross-border demand.

Hotels

CAD pricing, loyalty perks and a visible welcome win Canadians anywhere.

Source: The State of the International Traveler (SITS): Canada Edition 2026 (n=800 likely Canadian int'l travelers, Jan 5–15, 2026)

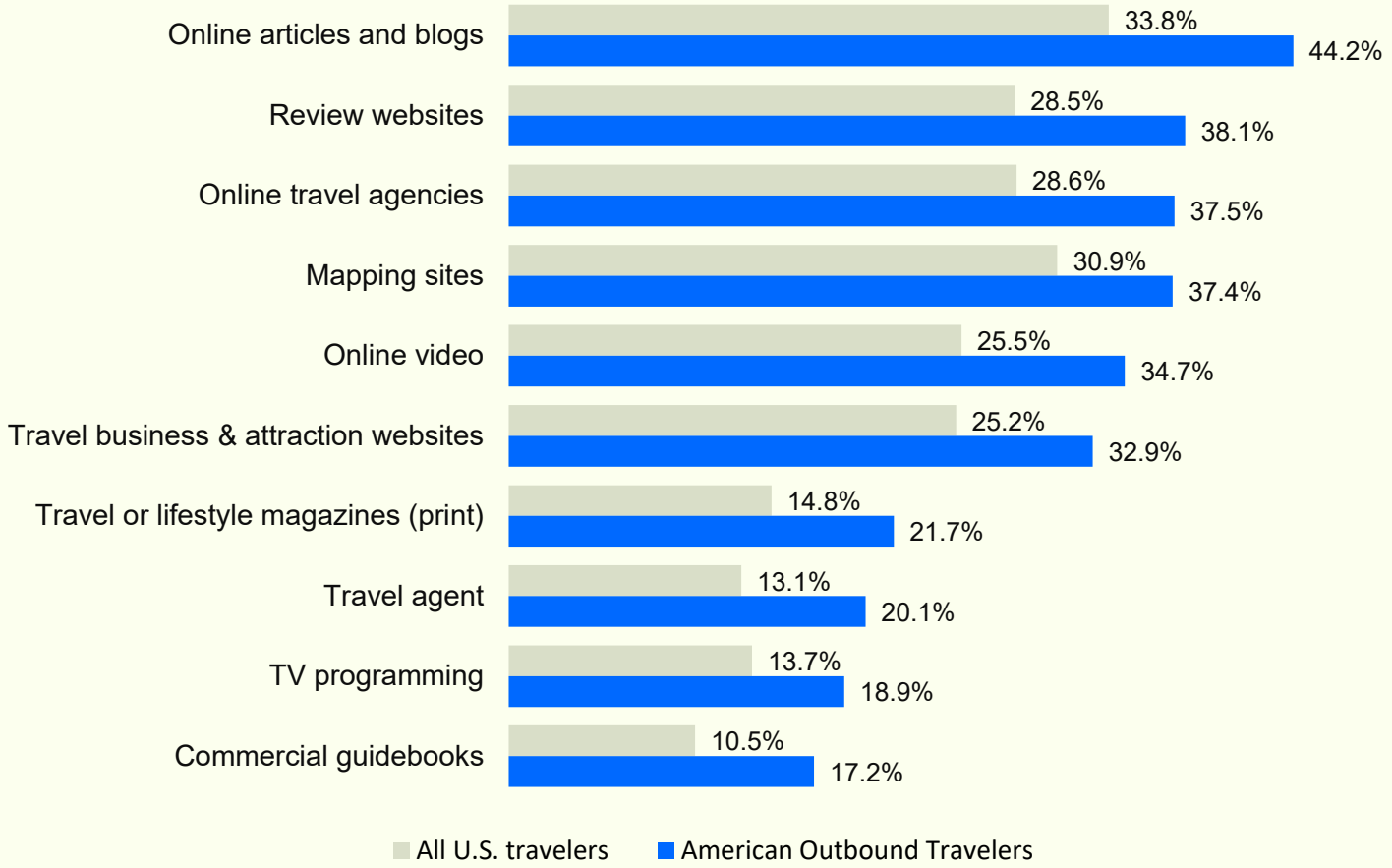
SECTION 4

How They Plan, Book & Spend

Future Partners

Online Articles, Review Sites and OTAs Lead American Outbound Travelers' Planning Resources

Resources used to help plan travel in the past 12 months



+10.4 pts

outbound travelers' lead in using online articles and articles and blogs (44.2% vs. 33.8%)

Outbound travelers use more of every resource. Only resource. Only 14.1% used none of the online resources, vs. 27.3% of all travelers. Print and human human advice over-index too: travel magazines, magazines, travel agents and guidebooks each run each run about 7 pts higher.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Canadians Pair Search With OTAs and Friends When Planning a Trip Abroad Abroad

Top resources Canadians would likely use to plan an international leisure trip



OTAs rank high in both countries: 40.8% of Canadians would use one for an international trip, and 37.5% of American Outbound Travelers used one in the past used one in the past 12 months. The questions differ, so treat comparisons as directional.

Source: The State of the International Traveler (SITS): Canada Edition 2026 (n=800 likely Canadian int'l travelers, Jan 5–15, 2026)

Three in Ten American Outbound Travelers Used a Travel Advisor, and Nearly as Many Took an Escorted Tour

30.5%

used a travel agent or advisor to plan travel in in the past 12 months

vs. 19.3% of all U.S. travelers

29.9%

took an escorted group tour while traveling in the past 12 months

vs. 18.0% of all U.S. travelers

53.7%

used online video to plan plan travel in the past 12 12 months

32.7% used a digital influencer's influencer's opinions

65.3%

used credit card points or rewards for travel in the past 12 months

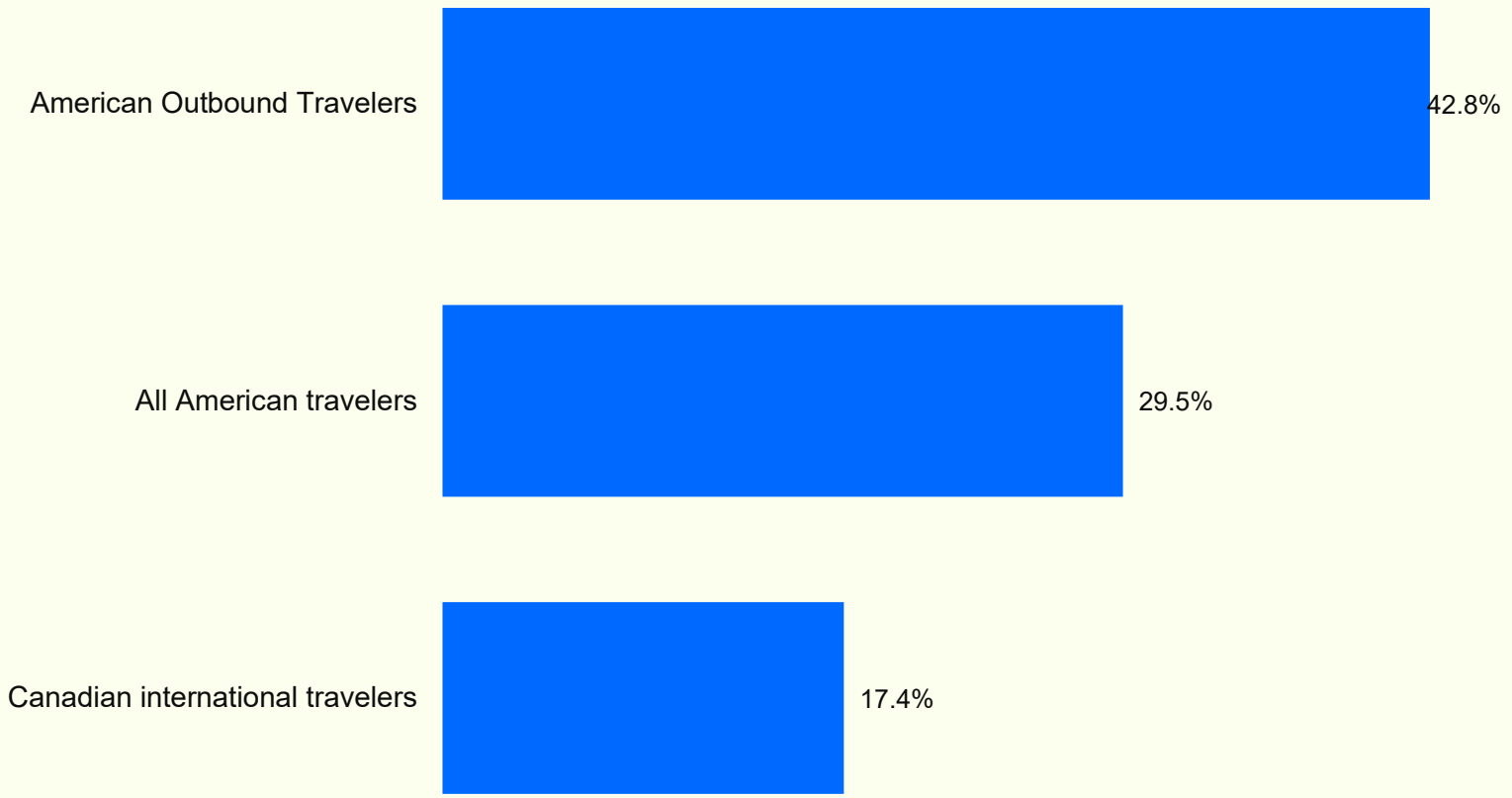
vs. 47.0% of all U.S. travelers

Human advice and guided travel carry more weight with the outbound traveler.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

AI Planning Runs Higher Among American Outbound Travelers Than Canadians

Directional: SATS = used in past 12 months; SITS = would use for an int'l trip



42.8% / 17.4%

Americans' actual use vs. Canadians' intended use. Different questions, so read the gap as directional

SO WHAT

DMOs

Keep site content current and structured so AI answers about you are accurate.

Tour Operators

Publish clear itineraries, prices and inclusions. AI verifies; vagueness costs bookings.

Airlines

Keep schedules, fares and policies machine-readable for AI readable for AI comparison.

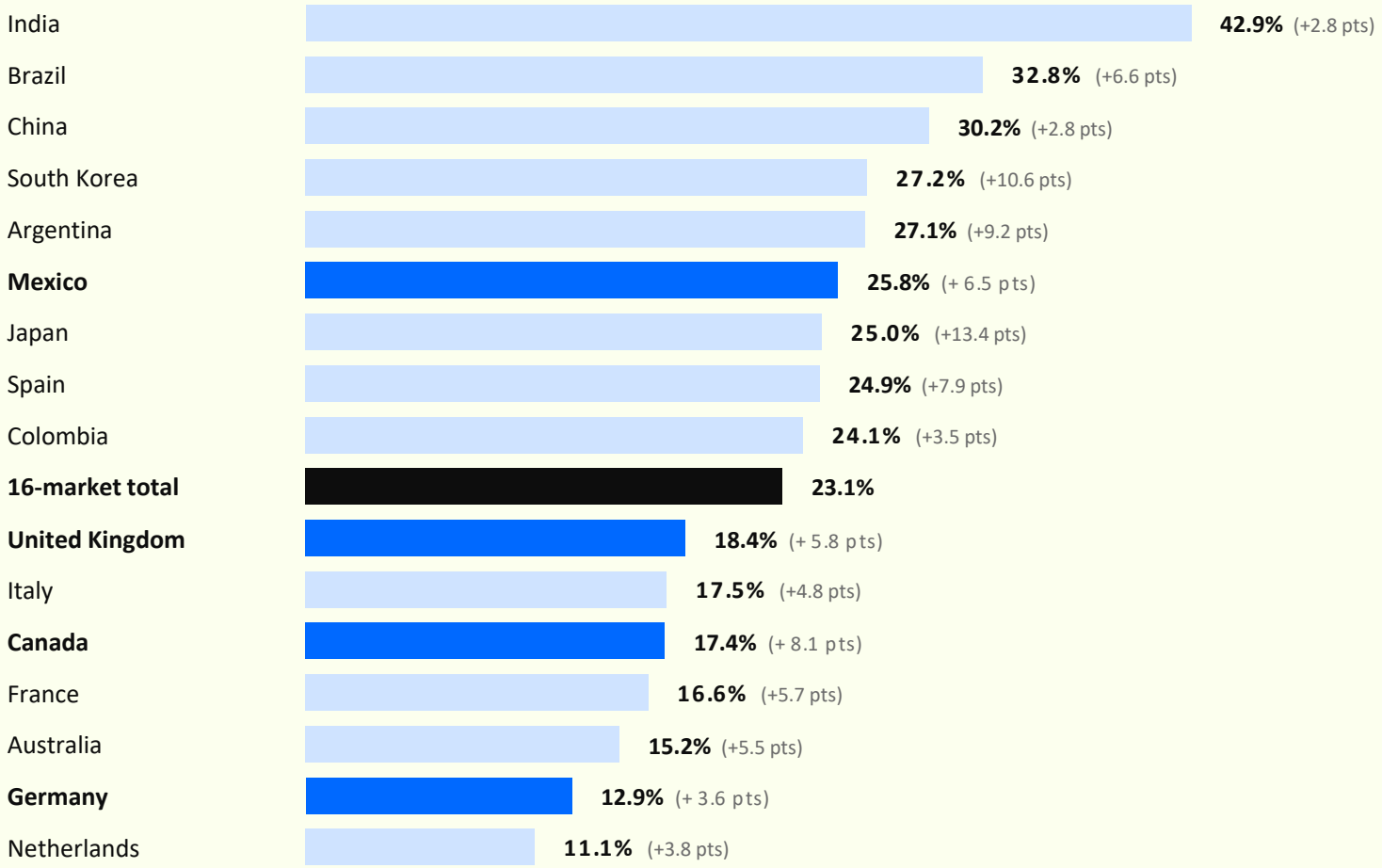
Hotels

Feed AI accurate amenity detail; keep owning discovery on search and social.

Source: SATS, Jan–Sep 2026 (n=36,115; outbound n=17,118); SITS: Canada Edition 2026 (n=800)

AI Trip Planning Is Rising in Every Market, but Canadians, Britons and Germans Lag Mexico and Asia

Would likely use an AI tool (ChatGPT, etc.) when planning an international leisure trip



+8.1 pts

Canada's one-year gain, nearly doubling from 9.3% in 2025 to 17.4%

Mexico (25.8%) sits above the global total of 23.1%, while the U.K. (18.4%) and Germany (12.9%) sit below it. For comparison, 42.8% of American Outbound Travelers used AI to plan travel in the past 12 months (SATS). That comparison is directional: SATS asks about actual use, while SITS asks which resources travelers would use for an international trip.

Source: The State of the International Traveler (SITS) 2026, fielded Jan 5–15, 2026 (n=800 likely international travelers per market; 12,800 total)

Three in Ten American Outbound Travelers Frequently Take Spontaneous Trips

Spontaneous Trips

29.3%

frequently or very frequently take spontaneous leisure trips

vs. 19.8% of all U.S. travelers

8.1%

take spontaneous trips very frequently

vs. 5.1% of all U.S. travelers

4.5%

never take spontaneous spontaneous trips

vs. 8.6% of all U.S. travelers

29.7%

of Americans likely to visit Canada frequently travel on impulse

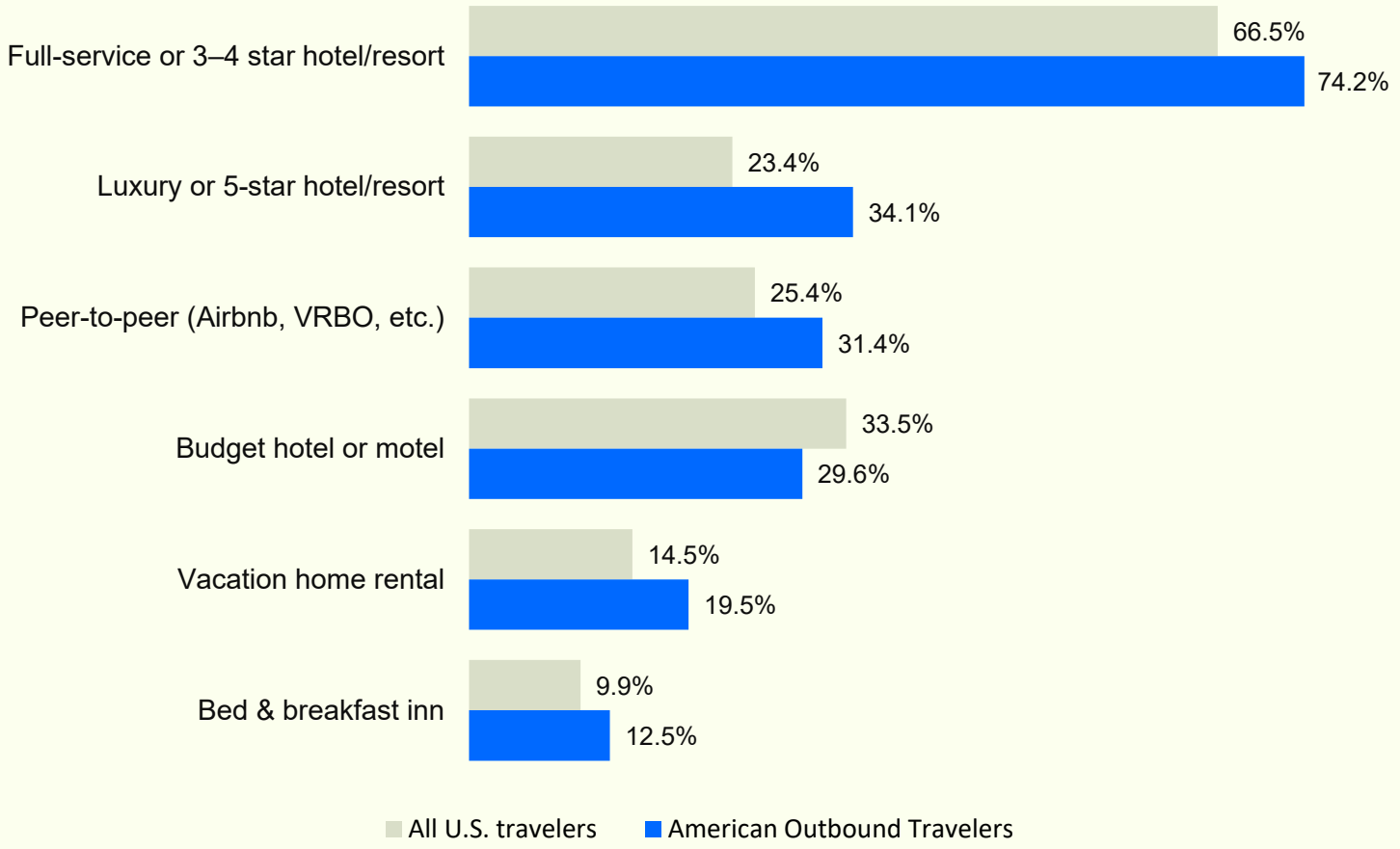
Spontaneous trips are a real opportunity for nearby markets

Always-on marketing matters: short-notice getaways sit alongside the big planned trip.

Source: SATS, Jan–Sep 2026. American Outbound Travelers (n=14,804) vs. all U.S. travelers (n=31,084); not asked every wave

Full-Service Hotels Dominate, but Luxury and Short-Term Rentals Show the Biggest the Biggest Gains

Types of paid lodging stayed in during the past 12 months



+10.7 pts

Outbound travelers' lead in luxury or 5-star hotel hotel stays

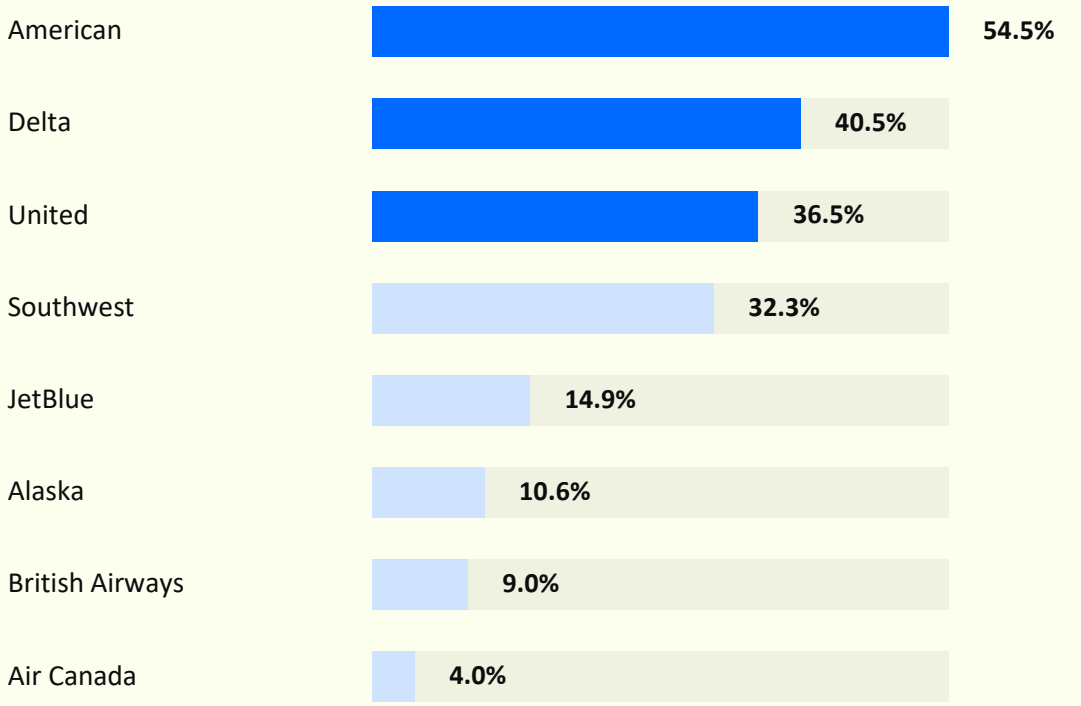
Americans likely to visit Canada lead on peer-to-peer lodging at 36.2%. Expedia (35.0%), Airbnb (31.3%) and Booking.com (30.8%) are the top sites outbound travelers used to book lodging.

Source: SATS, Jan–Sep 2026. Paid-lodging guests: American Outbound Travelers (n=15,997) vs. all U.S. travelers (n=30,607)

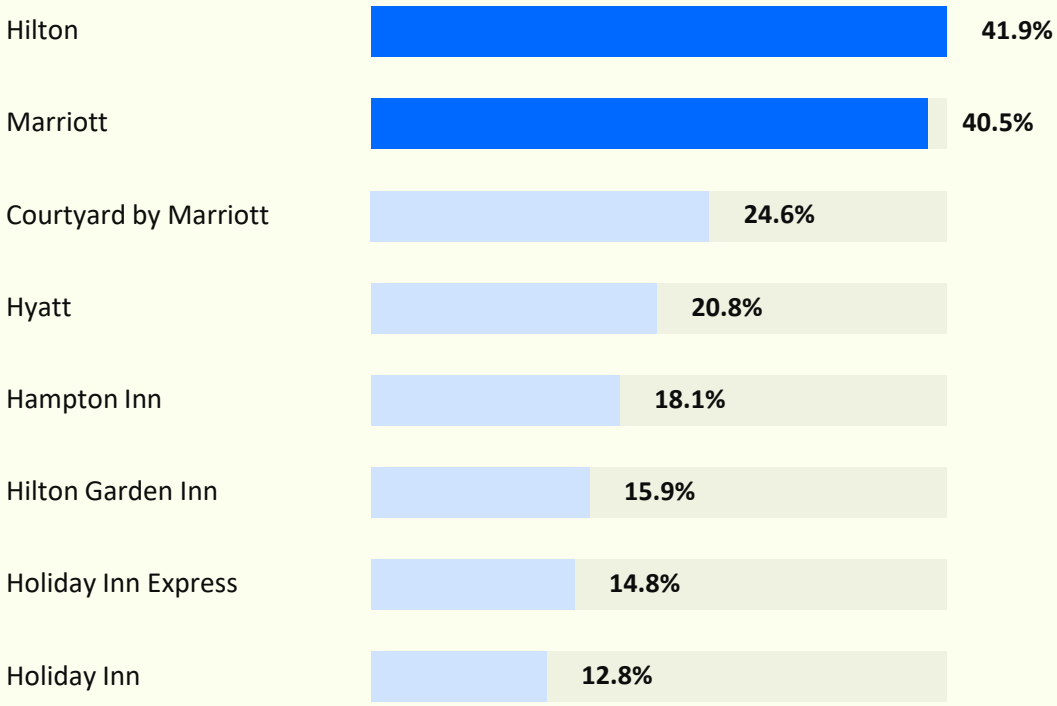
American and Delta Lead the Skies; Marriott and Hilton Lead the Hotel Stays

Stays

Airlines flown in the past 12 months



Hotel brands stayed in during the past 12 months

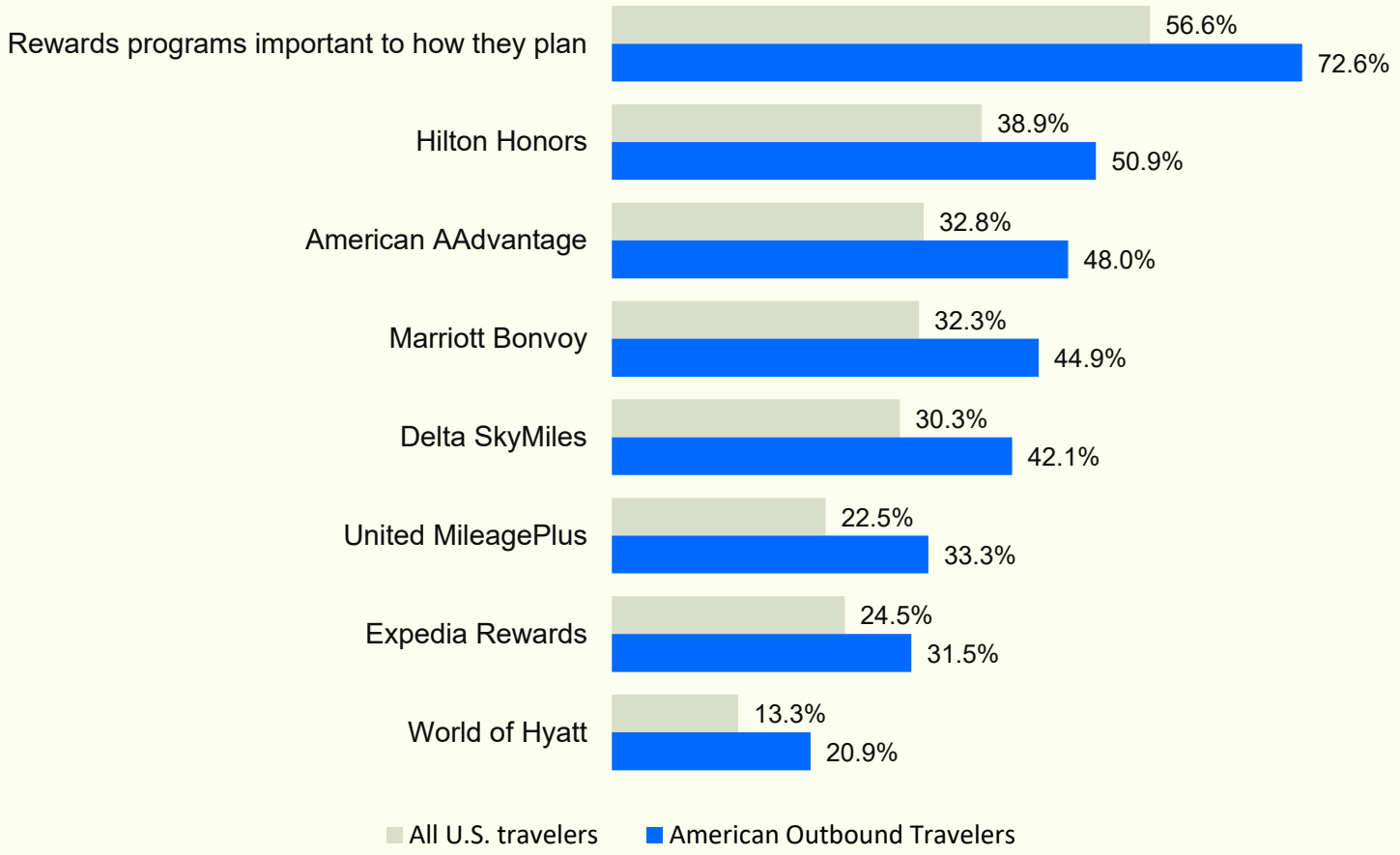


Among Americans likely to visit Canada, Air Canada climbs to 6.6% and Marriott (45.7%) edges past Hilton (44.9%).

Source: SATS, Jan–Sep 2026. American Outbound Travelers: airlines among flyers (n=14,630), hotels among hotel guests (n=13,652)

Loyalty Shapes Their Plans: 72.6% Say Rewards Programs Matter, and Half Use Hilton Honors

Importance of rewards programs and programs currently used



+16.0 pts

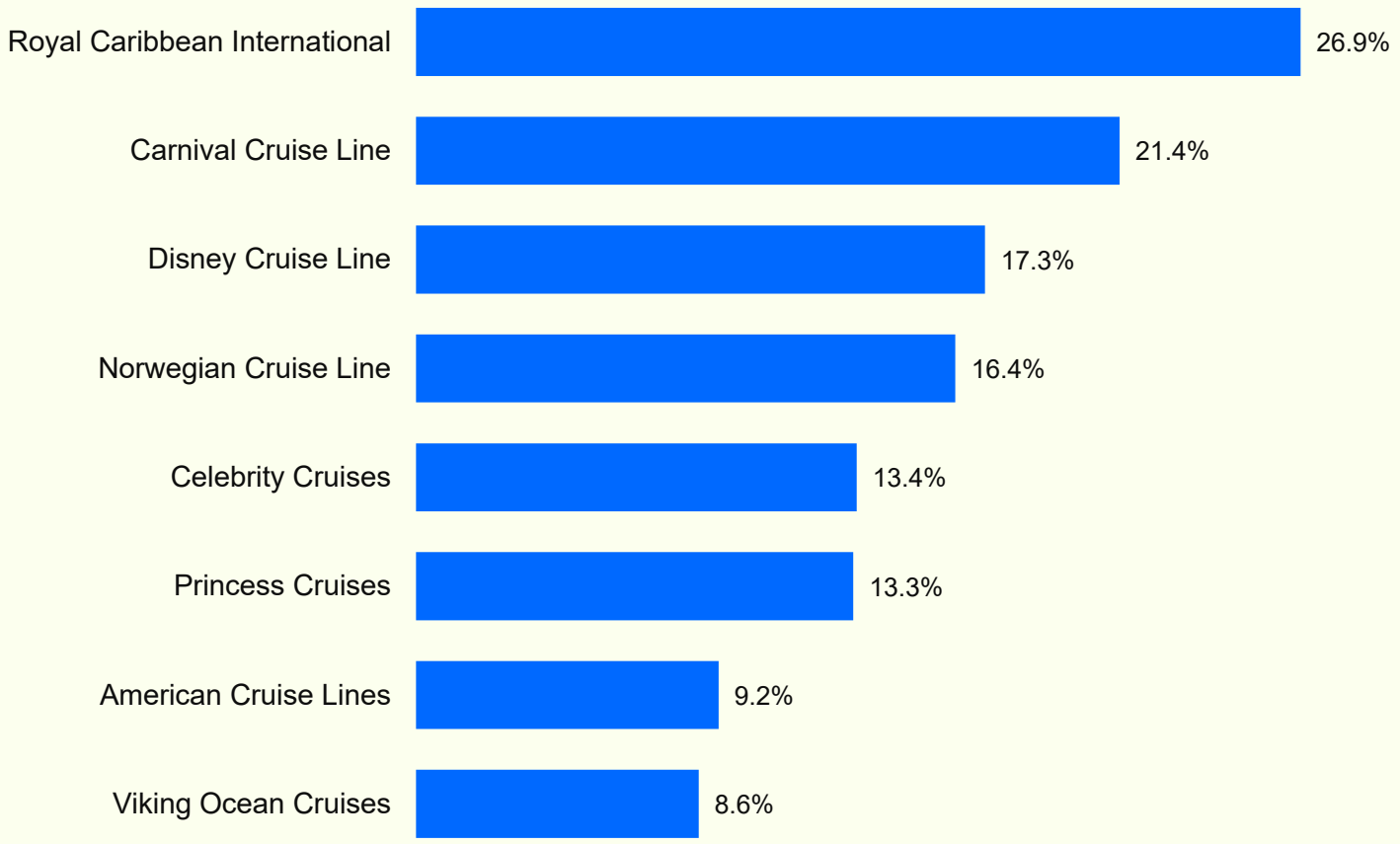
outbound travelers' lead in saying rewards programs shape their planning

Only 13.2% of outbound travelers use no airline airline rewards program, vs. 31.8% of all travelers. travelers. Booking-site programs reach further too: too: Expedia Rewards 31.5% and Booking.com Genius 26.9%.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Nearly Three in Ten American Outbound Travelers Cruised in the Past Year, Led by Year, Led by Royal Caribbean

Cruise lines traveled on in the past 12 months, among cruisers



29.1%

cruised in the past 12 months, vs. 16.5% of all U.S. travelers

Cruising nearly doubles among outbound travelers. travelers. For tour operators and port destinations, destinations, cruisers are a ready pool for pre- and and post-cruise stays and escorted add-ons.

Source: SATS, Jan–Sep 2026. American Outbound Travelers who cruised in the past 12 months (n=4,934)

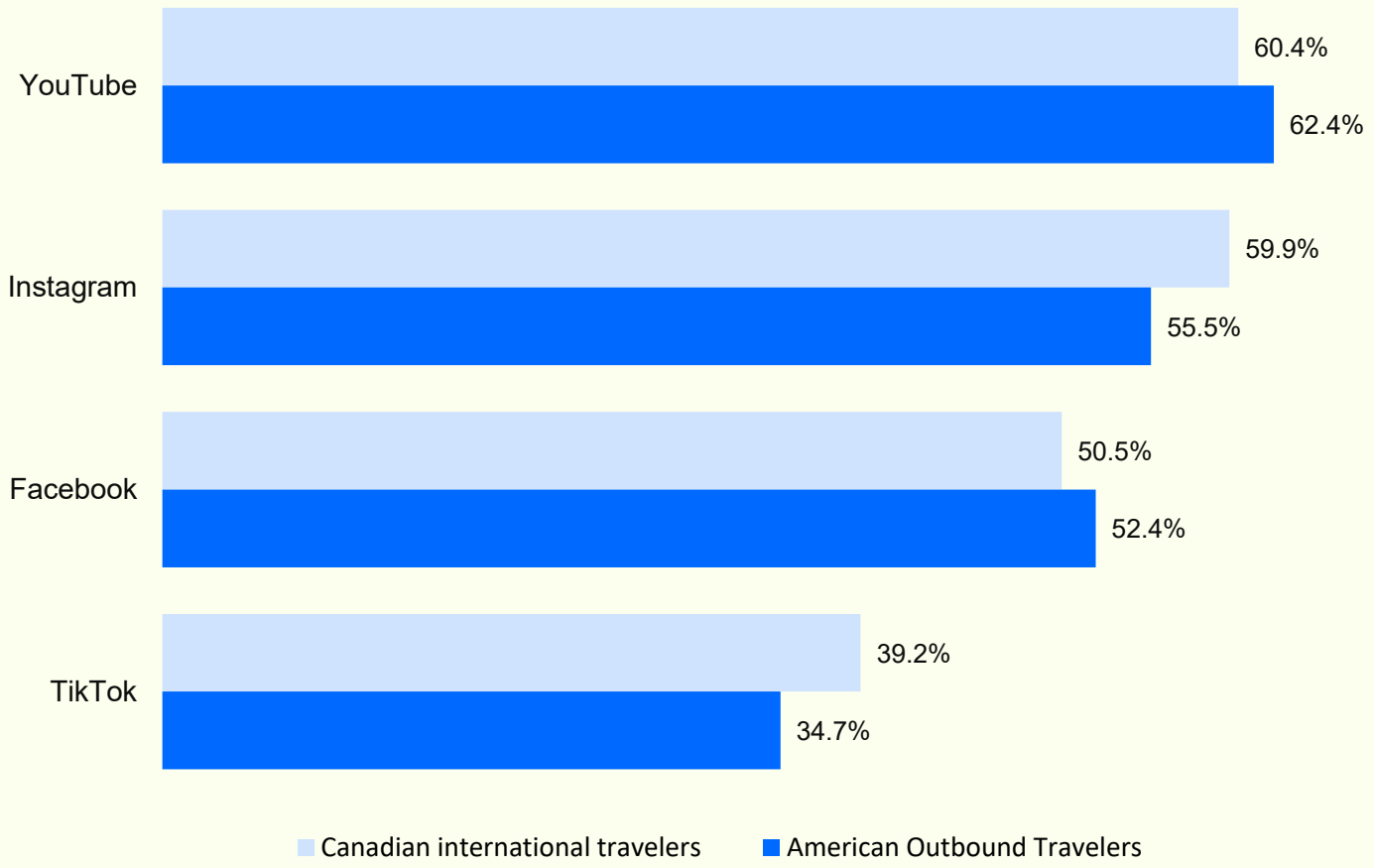
SECTION 5

The Media & Channels That Reach Them

Future Partners

YouTube and Instagram Lead Social Trip Planning on Both Sides of the Border Border

Social platforms used for trip planning, among those who plan with social media



60.4%

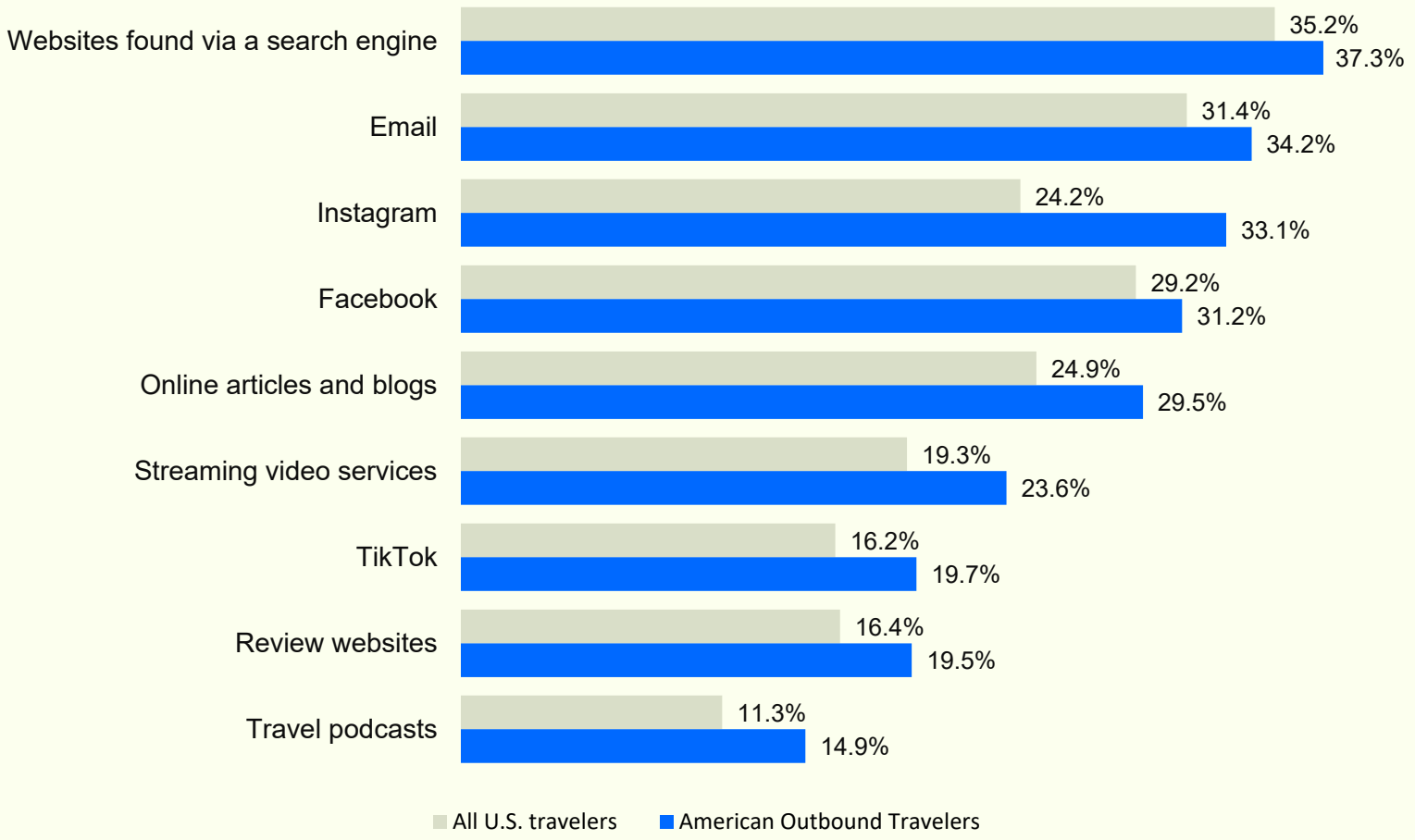
of Canadian social planners use YouTube for international trip planning

Directional: Canadians were asked which platforms they would use for an international trip; Americans, which they used to plan travel in the past 12 months. 67.8% of American Outbound Travelers used any social platform to plan, vs. 55.3% of all U.S. travelers. Reddit is emerging in both: 19.3% of Canadian social planners (vs. 10.4% globally) and 15.4% of American Outbound Travelers.

Source: SITS: Canada Edition 2026 (social media planners); SATS, Jan–Sep 2026 (American Outbound Travelers who planned with social)

Search, Email and Instagram Reach American Outbound Travelers Best, With With Instagram Showing the Biggest Lift

Where they are most receptive to learning about new destinations



+8.9 pts

Instagram's lift among American Outbound Travelers vs. all travelers

SO WHAT

DMOs

Keep search and email as the backbone; put growth budget budget into Instagram.

Tour Operators

Long-form articles and podcasts suit considered, higher-higher-priced trips.

Airlines

Email loyalty members; rewards shape how this traveler traveler plans.

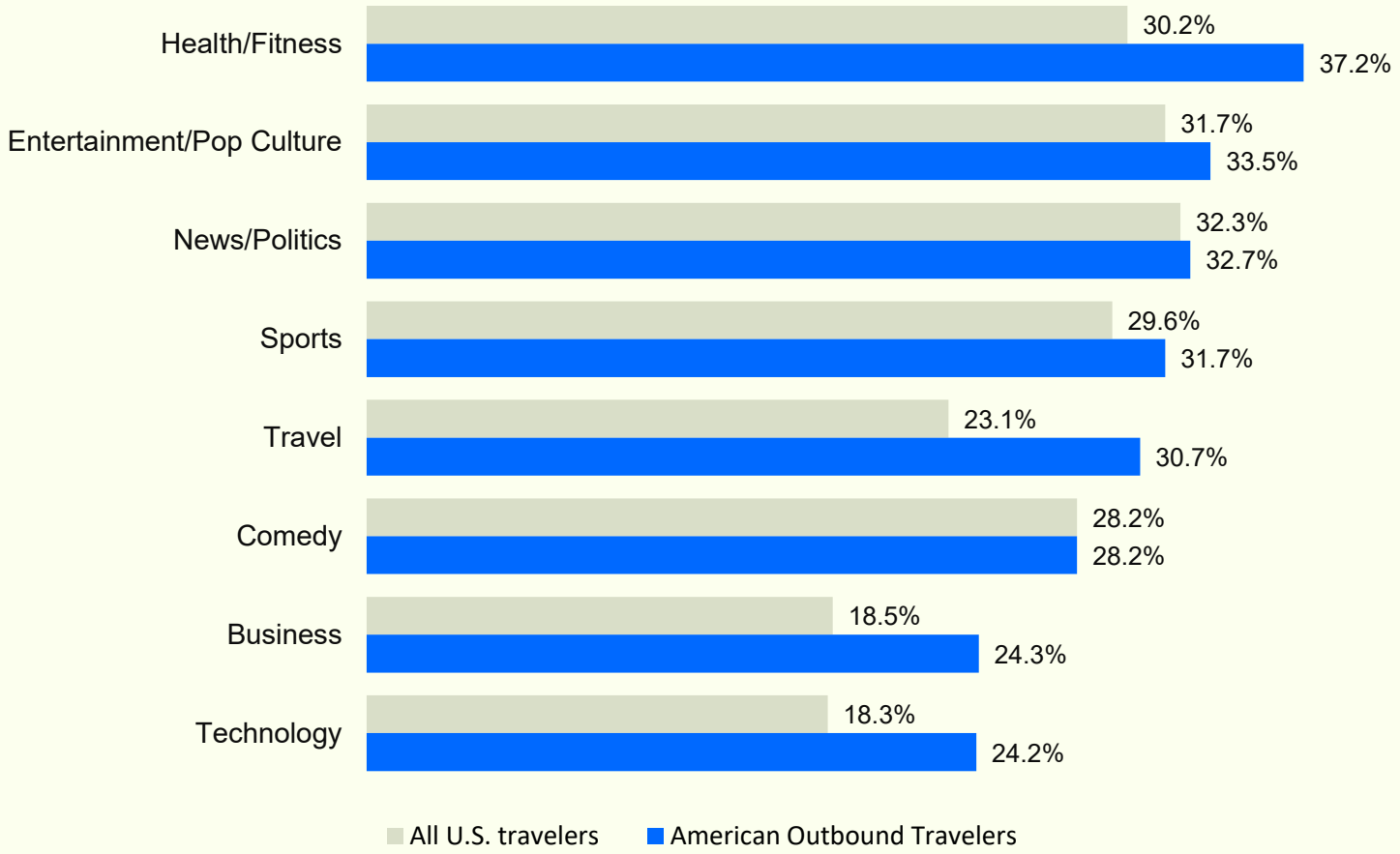
Hotels

Reviews and Instagram shape the shortlist. Invest in guest content.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Nearly Half Listen to Podcasts, and Travel Shows Have the Biggest Lift

Podcast genres listened to regularly, among podcast listeners



44.8%

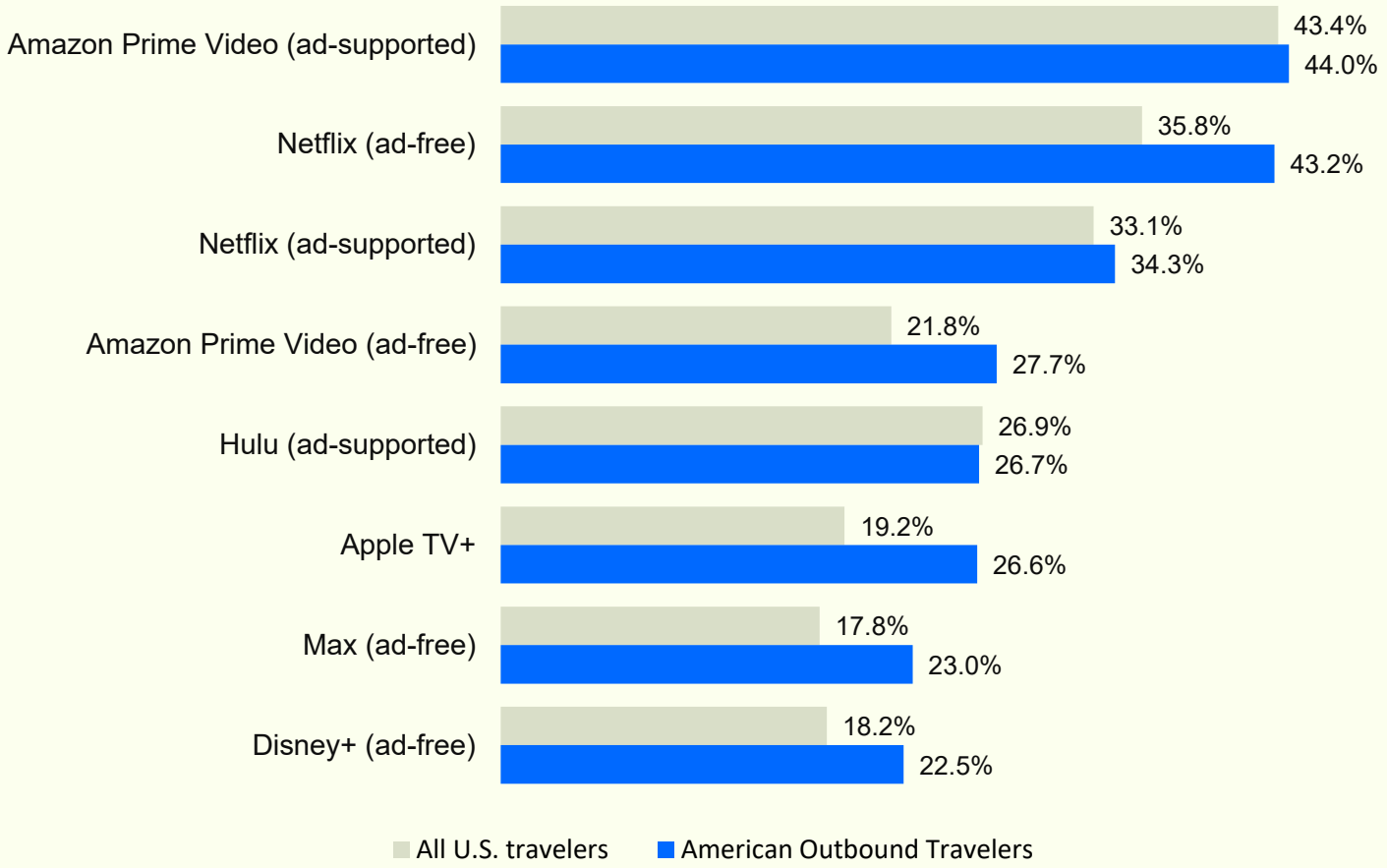
of American Outbound Travelers listen to podcasts regularly, vs. 37.2% of all U.S. travelers

Travel podcasts lead all genres in lift (+7.6 pts), pts), followed by health/fitness (+7.0). YouTube YouTube (54.3%) and Spotify (53.8%) are the top top listening platforms, with Apple Podcasts at at 41.9%.

Source: SATS, Jan–Sep 2026. Regular podcast listeners: American Outbound Travelers (n=7,774) vs. all U.S. travelers (n=13,681)

Outbound Travelers Pay to Skip Ads, but Amazon's Ad-Supported Tier Still Reaches Still Reaches 44%

Streaming services subscribed to or watched regularly



+7.4 pts

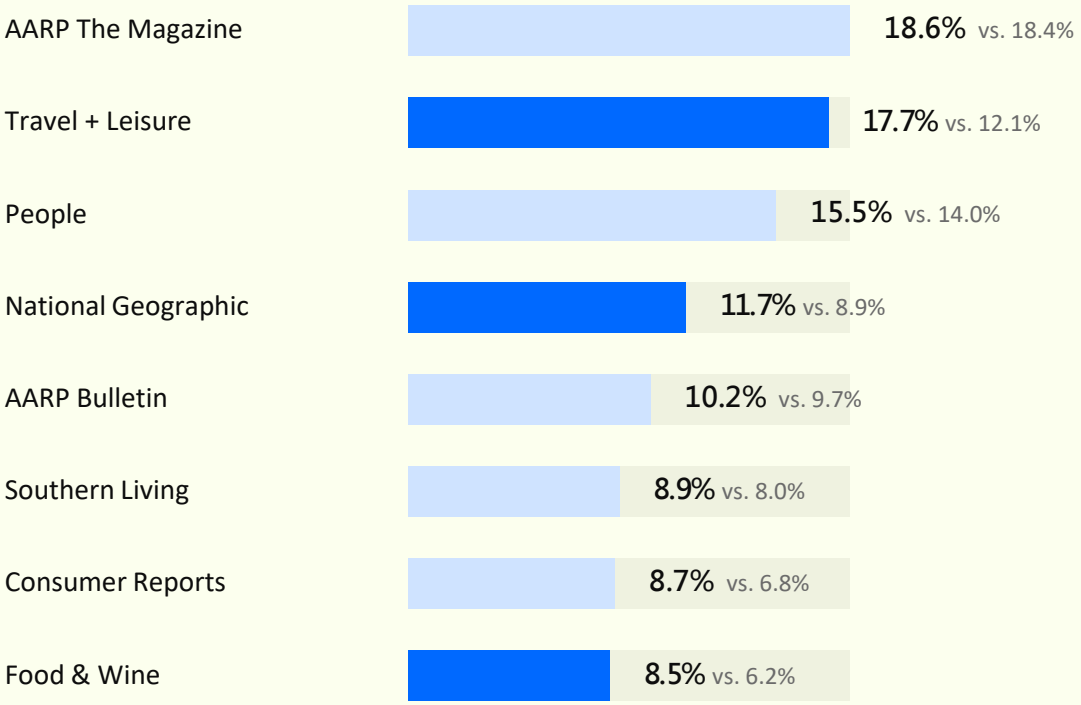
outbound travelers' lead for both Netflix ad-free free and Apple TV+

Ad-free tiers and Apple TV+ hold the biggest leads. Free ad-supported services under-index: Tubi 17.2% (vs. 22.3%) and Pluto TV 9.9% (vs. 13.0%).

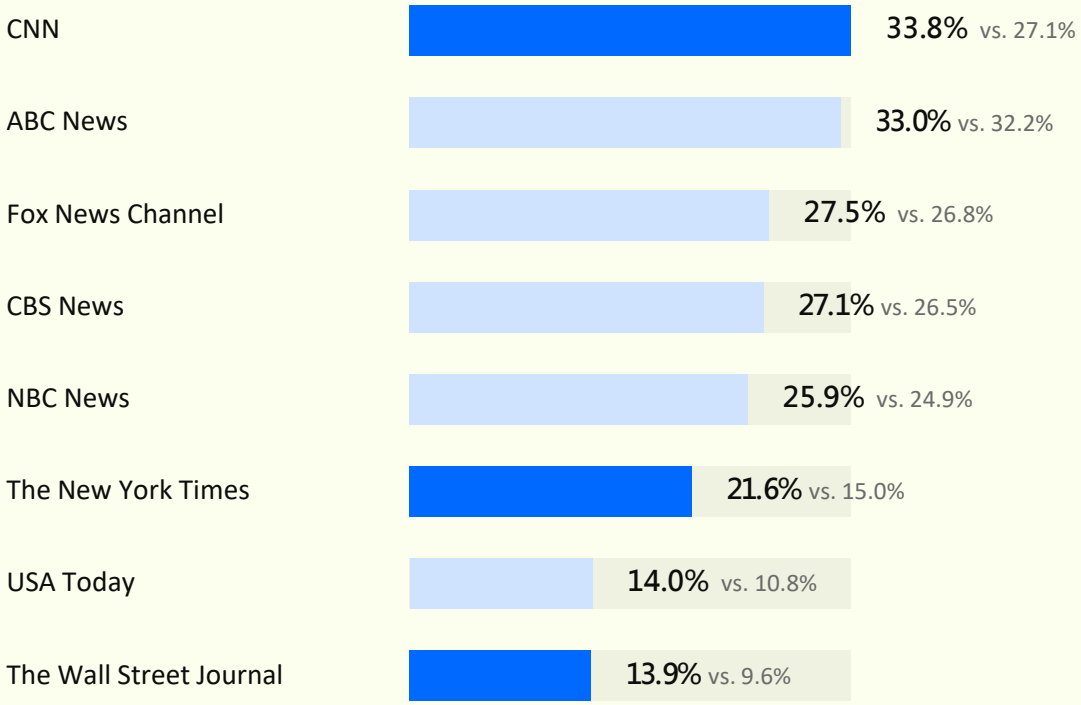
Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

Travel + Leisure and The New York Times Over-Index Most With American American Outbound Travelers

Magazines read in the past 12 months (print or online)



News sources used regularly



Dark bars mark the largest leads over all U.S. travelers (gray figures). Broadcast news reaches outbound travelers at about the general rate; national print titles and travel and food magazines are where they over-index.

Source: SATS, January–September 2026. American Outbound Travelers (n=17,118) vs. all U.S. travelers (n=36,115)

KEY TAKEAWAYS

The North American Traveler Is Still Going.

WHO THEY ARE

46.5%

of American travelers are outbound travelers: affluent ($140,769), flying and loyal. Target them, not the average.

WHY THEY GO

75.0%

of American Outbound Travelers call international travel a passion. Sell food, history and well-being.

WHERE THEY LOOK

22.5%

of Canadians want Mexico (2.3x global). Canada ties Italy as Americans' top pick (27.4%).

HOW THEY PLAN

42.8%

of American Outbound Travelers used AI to plan. Canadians start with search (47.9%) and OTAs.

HOW TO REACH THEM

+8.9 pts

Instagram's lift with outbound travelers. Add it to search, email and loyalty offers.

Thank you.

Erin Francis-Cummings erin@futurepartners.com | In partnership with Miles Partnership

Audience Poll

What are your top three priorities for US & Canadian Travelers to your destination for the year ahead?

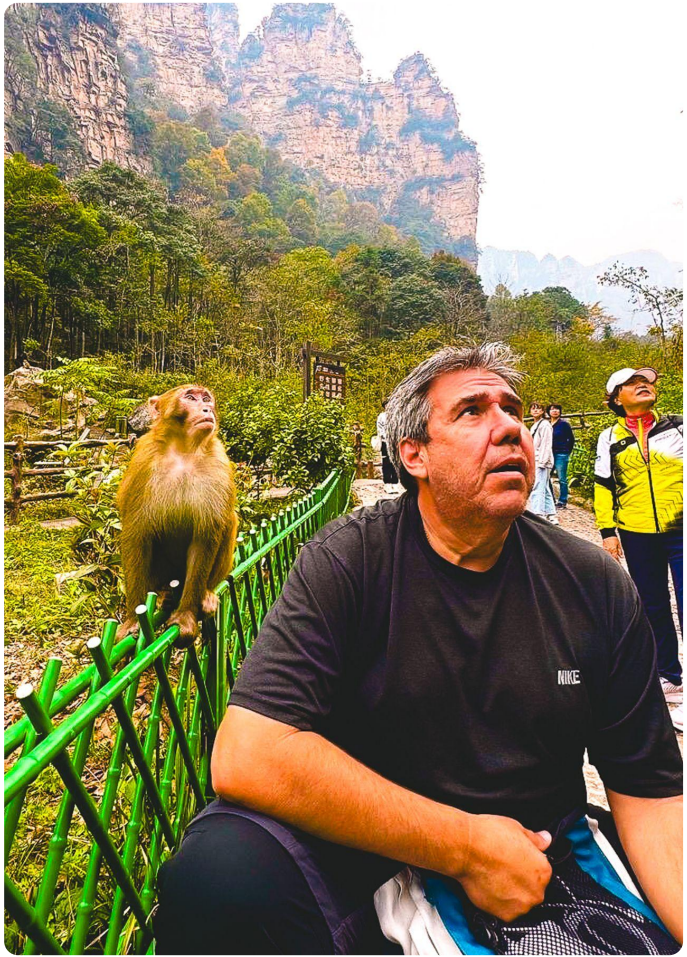
Tick up to 3 boxes

- ❑ Grow travel from new parts or segments of the US market
- ❑ Grow travel from new parts or segments of the Canadian market
- ❑ Increase the spend and/or length of stay of US & Canadian visitors
- ❑ Grow North American visitors to meetings, events, sports etc
- ❑ Grow off or shoulder season travel from the US and Canada
- ❑ Drive dispersal of US & Canadian travelers to less popular areas
- ❑ Other: please add your other priorities in the chat

The American & Canadian International Traveler

Agend

01. Market Specific International Behavior
02. Trending International Destinations
03. International Experiences Behavior



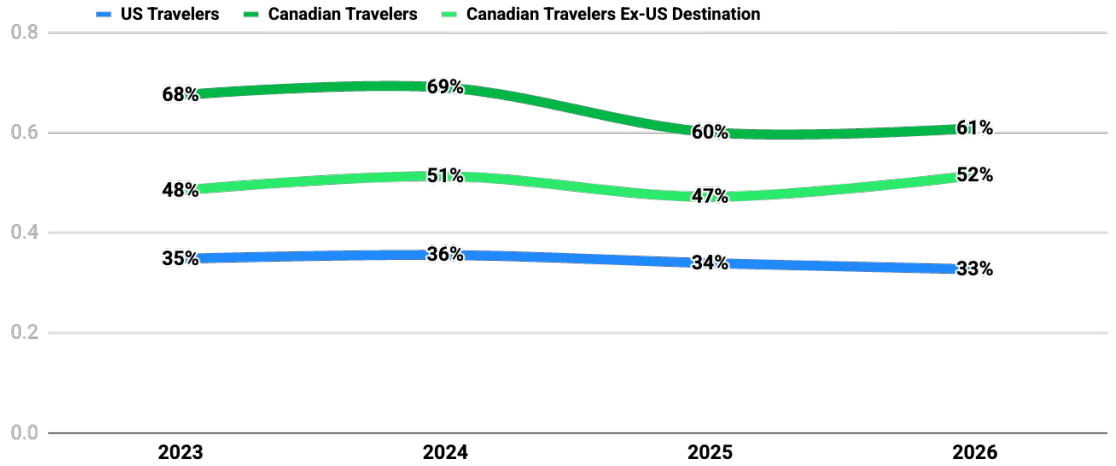


General International Travel Behavior

Despite a challenging macro environment, international travel remains a vital part of the American & Canadian travel diet

As a share of overall travel–in both the US and Canada–international demand has held up in the face of what is a challenging macro environment. To date in 2026, 1 in 3 stays on the Tripadvisor platform from US users are directed to international destinations. While Canadian travel to the US has dipped since early 2025, international interest excluding the United States has actually increased over the last few years.

Share of Travel Going to International Destinations, Jan-Sep, US & Canadian Travelers

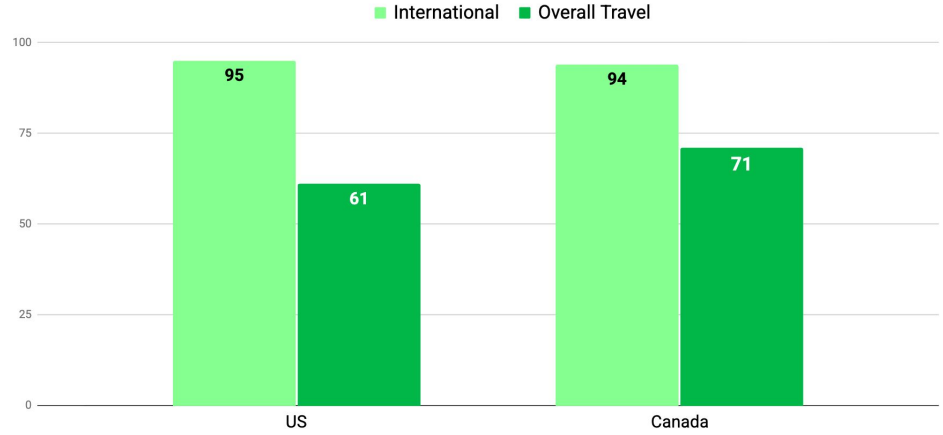


Source: Tripadvisor, Internal Data, 2023-2026

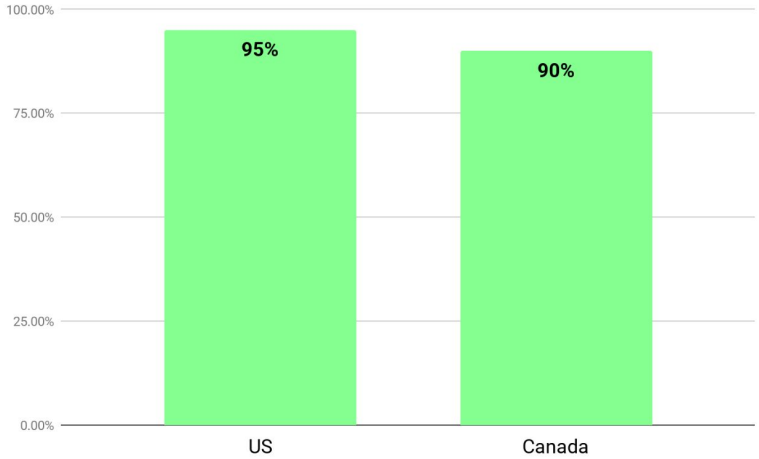
International travel is planned with more care and higher accommodation spend than average

American and Canadian travelers plan international travel trips with significantly more lead time than the average trip planned across the platform and they're willing to allocate spend to accommodations they wouldn't splurge for at home.

Average Lead Time, International Travel vs Platform Average, Jan-Sep 2026



Median International Travel Spend Increase vs Average Trip
US & Canadian Users, Jan-Sep 2026



Source: Tripadvisor, Internal Data, 2023-2026



Trending International Destinations

Over the last few years, Canadians & Americans have seen a divergence in destinations of interest

Over the last four years, American travelers have increasingly sought out mostly short haul destinations with sun and sand dominating, while Canadian travelers have a more diverse set of trending destinations with Europe, Mexico and Asia all represented in the top 5.

Trending International Destinations, US Travelers

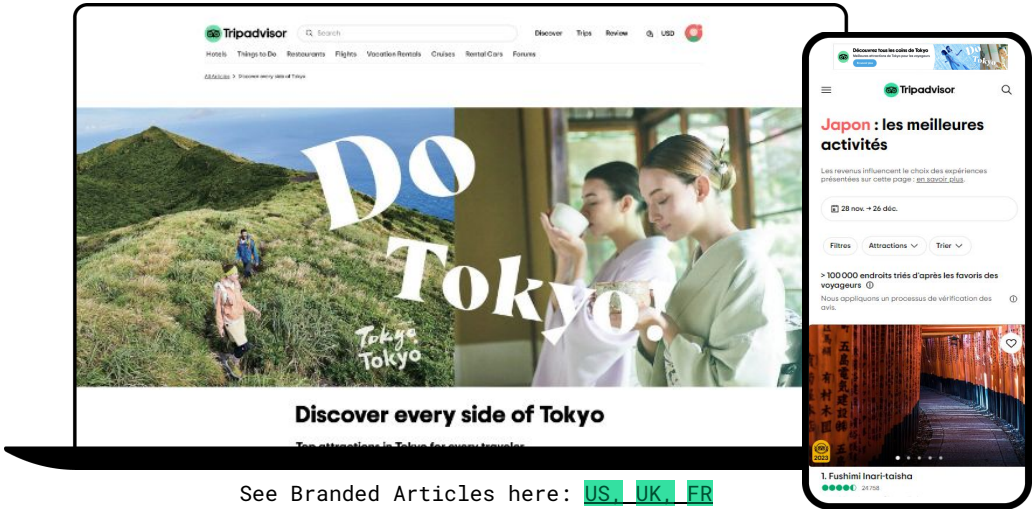
City	% Change L4Y
Simpson Bay, SX	**+147%**
Tulum Beach, MX	**+145%**
Noord, AW	**+116%**
Tokyo	**+67%**
Mexico City	**+63%**

Trending International Destinations, CA Travelers

City	% Change L4Y
Mexico City	**+104%**
Mazatlan, MX	**+102%**
Madrid	**+92%**
Vienna	**+82%**
Seoul	**+73%**

Source: Tripadvisor, Internal Data, 2023-2026

Case Study: Tokyo Branded Content



See Branded Articles here: US, UK, FR

Campaign objective
Increase attention to Tokyo and drive traffic to destination-related content in three key regions - US, UK, and FR.

Our solution
We created a custom Branded Content page that integrated Tokyo POIs and showcased seasonal trends to US, UK, and FR users. Three pages were created, 1x for each region, and highlighted top attractions, art & culture, food, accommodations & more, to allow consumers to *'Discover every side of Tokyo.'* To drive as much traffic to the pages, we executed TripConnect social amplification, Native Boost, and Rove onsite & offsite banners. All media included English and French creatives.

Results

.32%
Onsite & Rove banners CTR
(220% above benchmark)

1.17%
Offsite Rove CTR
(192% above benchmark)

63K+
Branded article pageviews

Source: Tripadvisor internal data



Experiences & International Travel

Experiences are heavily skewed towards international travel

The online experience booking category heavily favors international travelers and it's been an area where we've seen immense growth over the last few years. In the US, international experience bookings have increased 105% over the last four years and in Canada we've seen an equally strong 111% increase over the same time period.

Markets	Growth in International Experience Bookings L4Y	% Share of Overall Experience Bookings Going to International Destinations
US	**+105%**	**66%**
Canada	**+111%**	**84%**

Source: Tripadvisor, Internal Data, 2023-2026

The experiences category is evolving from walking tours to genuinely immersive experiences

Across both the US and Canada, the categories of experience growing their demand most over the last four years are ones that allow travelers to experience a destination in a unique and interesting way.

Trending International Experience Categories, US Travelers, L4Y

Category
Craft Classes
Concerts & Special Events
Photography Tours
Nature & Wildlife
Cooking Classes

Trending International Experience Categories, CA Travelers, L4Y

Category
Nature & Wildlife
Theater, Shows & Musicals
Cooking Classes
Hiking & Camping Experiences
Food Tours

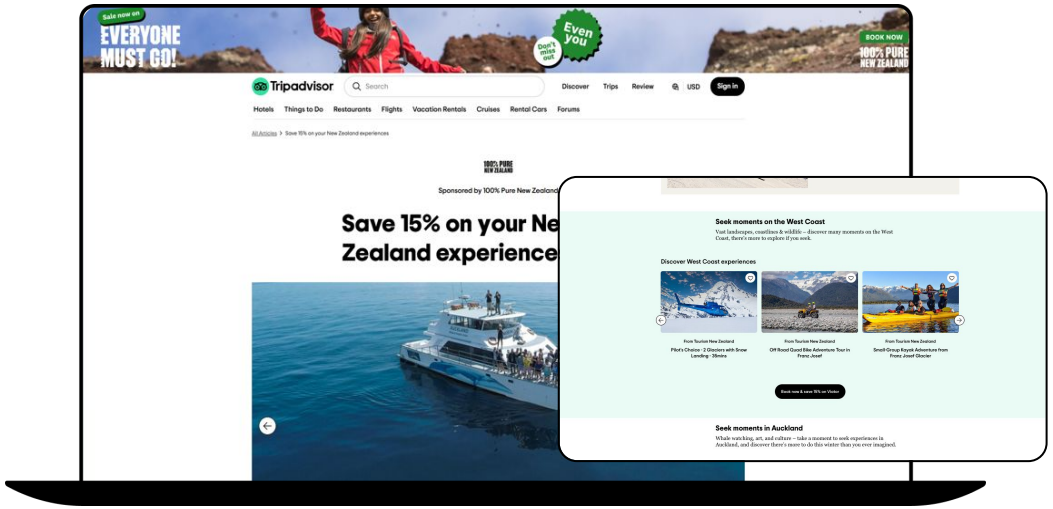
Source: Tripadvisor, Internal Data, 2023-2026

Case Study: 100% Pure New Zealand

Campaign objective
Drive arrivals and bookings to New Zealand.

Our solution
Created a Branded Article page featuring the top experiences in every region in New Zealand to drive Viator bookings. We also secured a 15% discount off Viator experiences to help drive bookings that we promoted on the page. Traffic drivers to the page included Native Boost and audience extension to increase viewers.

Results
We used Adara tracking to measure the additional conversions coming through via hotel & flight bookings - confirming success and the impact of the campaign.



Branded Article

3%
Overall media CTR

119K
pageviews

3,630
Incremental passengers achieved (65% above goal KPI)

1,018
Adara passenger bookings (flight + hotel) in result of the campaign

Source: Tripadvisor internal data

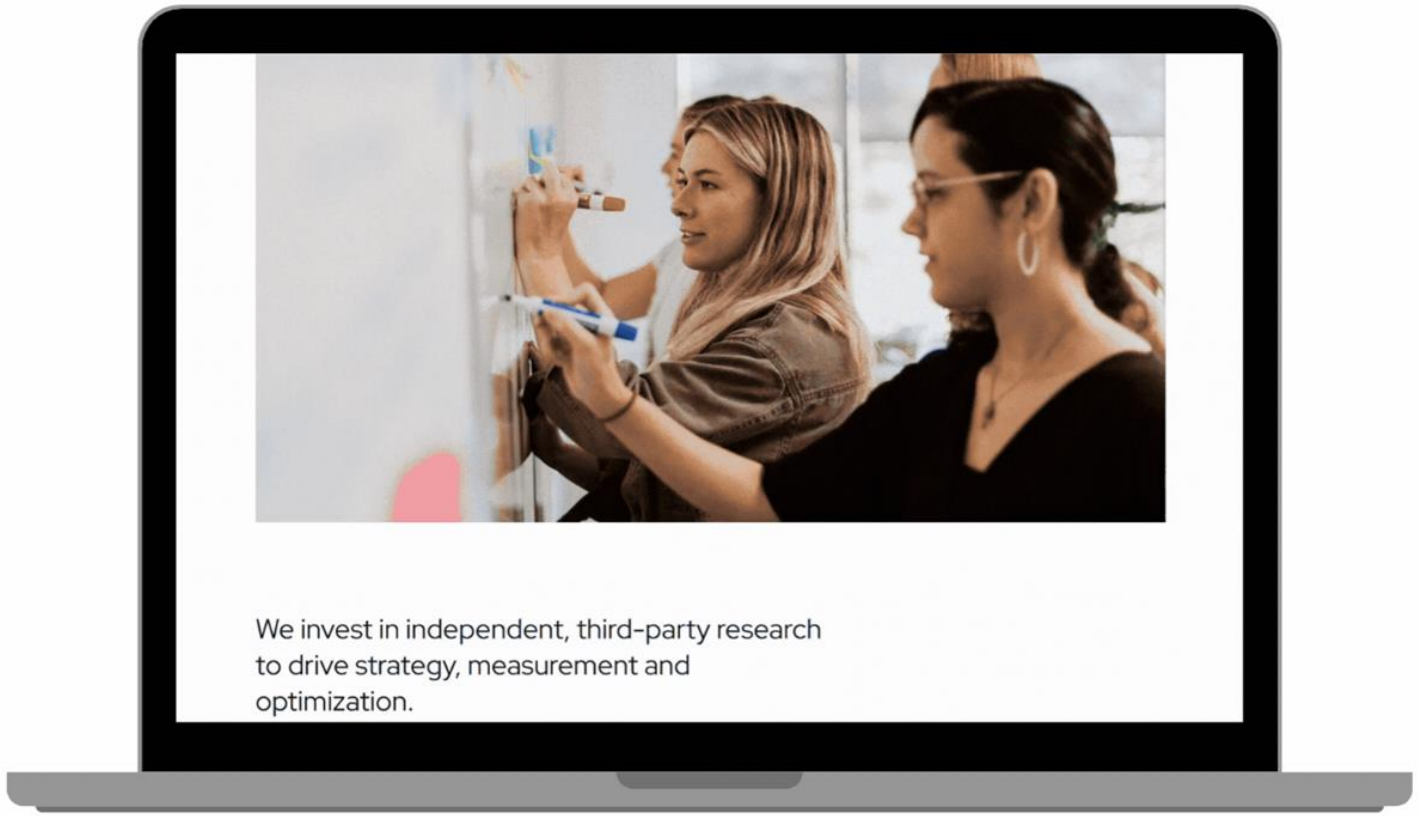


Thanks.

Article

Going Global

5 Marketing Essentials for the North American International Traveler



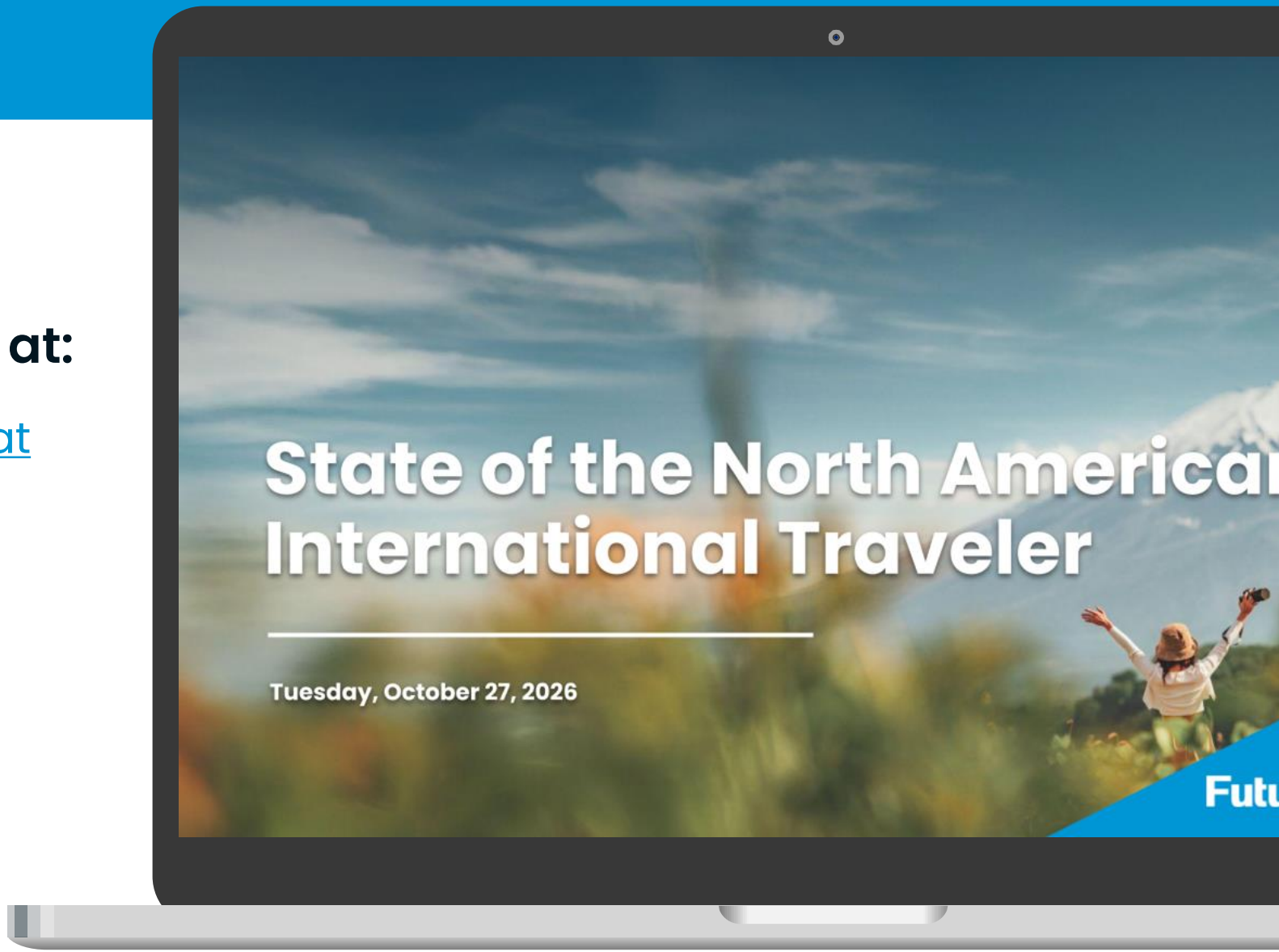
milespartnership.com

Research and Webinar Resources

Research, slides and other resources will be available at:

www.milespartnership.com/snat

www.futurepartners.com



Thank You!
State of the North American International Traveler

Tuesday, October 27, 2026



miles PARTNERSHIP

Future Partners