

2025



Navigating the “Trump Effect”

on international travel to the US





- 01** Intro to Methodology
- 02** Initial reactions to the 2024 US election
- 03** Current global trends
- 04** Zooming in on key travel markets
- 05** The evolving US international visitor

Introduction to Methodology

Leveraging YouGov's proprietary consumer research panel of 28+ million people worldwide.

Omnibus Surveys

Q: Following the US elections in November 2024, are you more or less likely to consider visiting the United States on your next international trip?

Dec 2024: 16 markets
Feb 2025: CA, GB, MX

DestinationIndex

Syndicated dataset updated daily with public perception of 200+ travel destinations and 30 key tourism markets daily, across 16 vital brand health metrics

In this presentation:
-Global averages
-Focus on CA, UK, MX

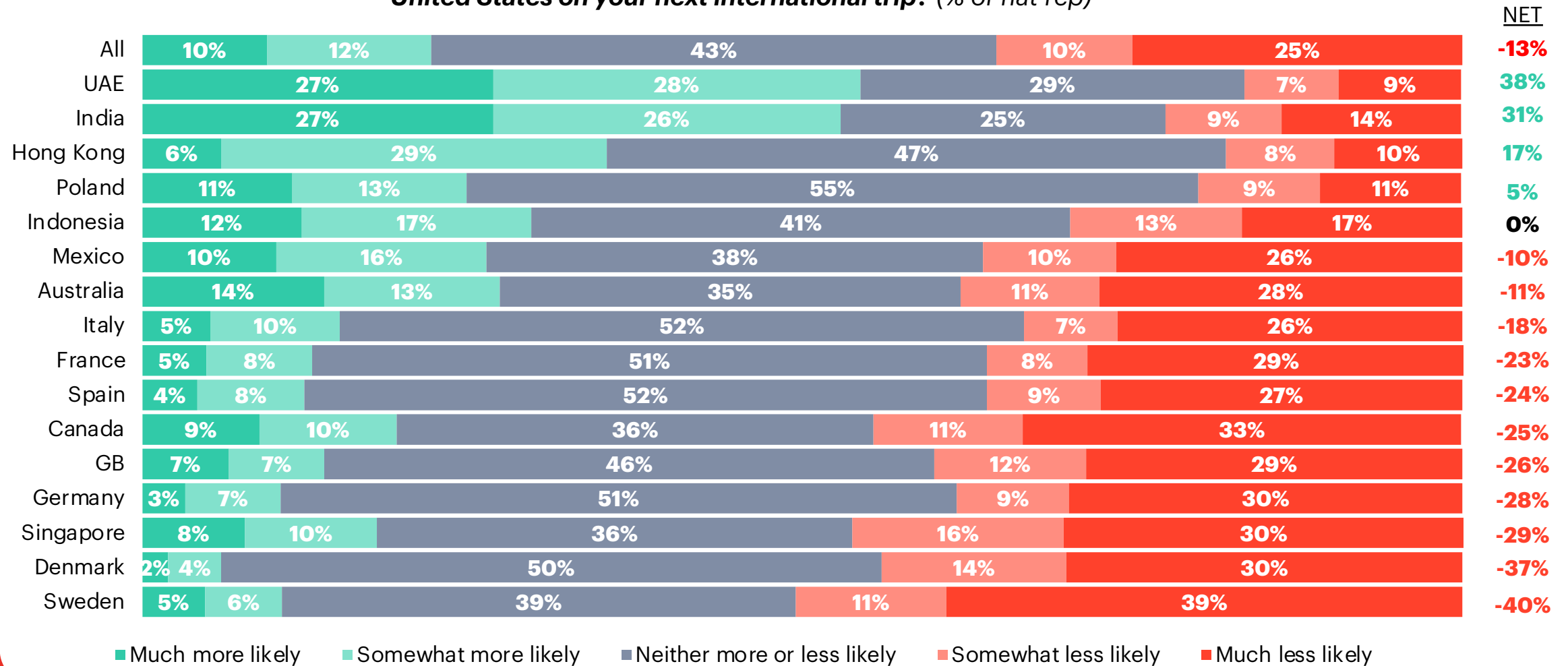
Global Travel Profiles

Syndicated dataset updated regularly with over 25,000 surveys per market per year, featuring data on travelers from 30 different key tourism markets.

What were people saying when he got elected?



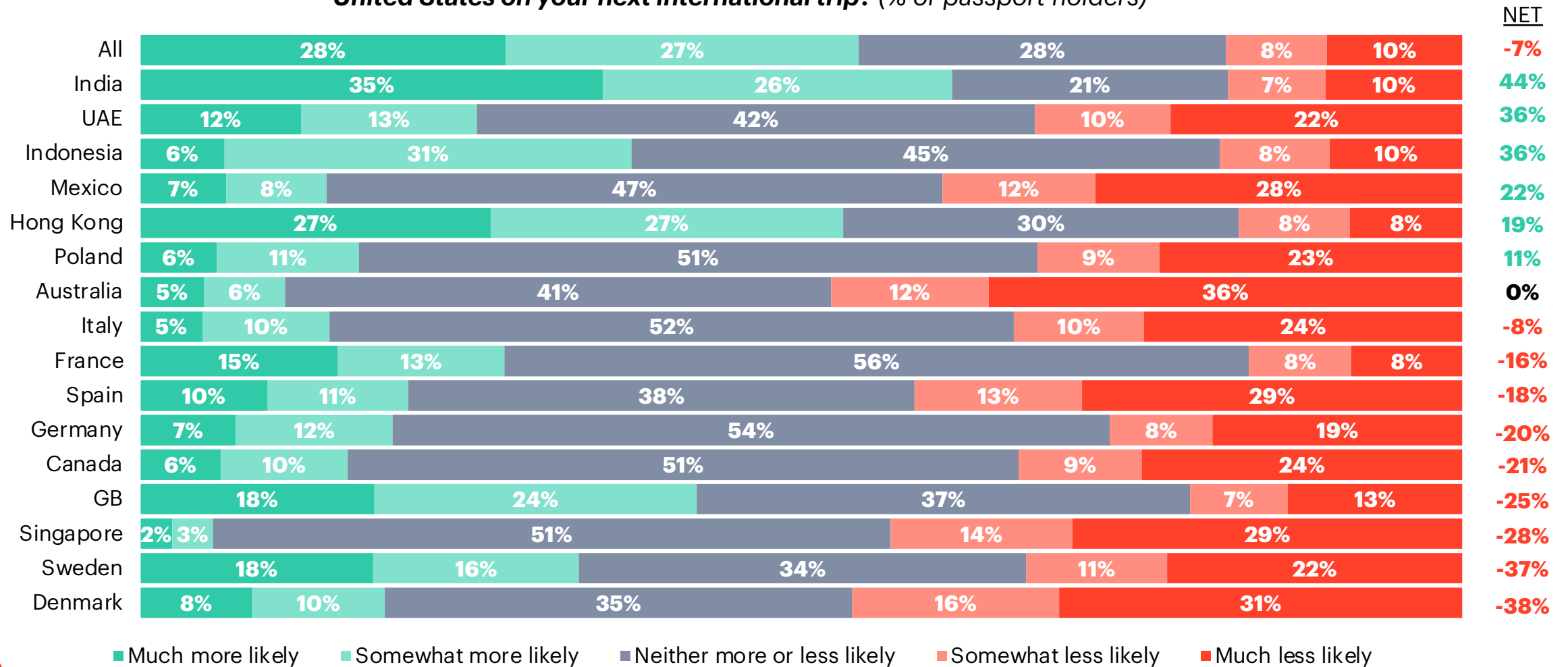
Following the US elections in November 2024, are you more or less likely to consider visiting the United States on your next international trip? (% of nat rep)



YouGov Surveys: December 16, 2024 – January 2, 2025. Data re-weighted after removing "Don't know" responses. (Each country: n> 875)

All = unweighted average of 16 markets.

Following the US elections in November 2024, are you more or less likely to consider visiting the United States on your next international trip? (% of passport holders)



Passport holders much less likely to be impacted by US administration changes

Notable differences between general populations and international travelers in Indonesia and Mexico

YouGov Surveys: December 16, 2024 – January 2, 2025.
Data re-weighted after removing "Don't know" responses.
(Passport holders in each country: n> 450)
"All" = unweighted average of 16 markets.

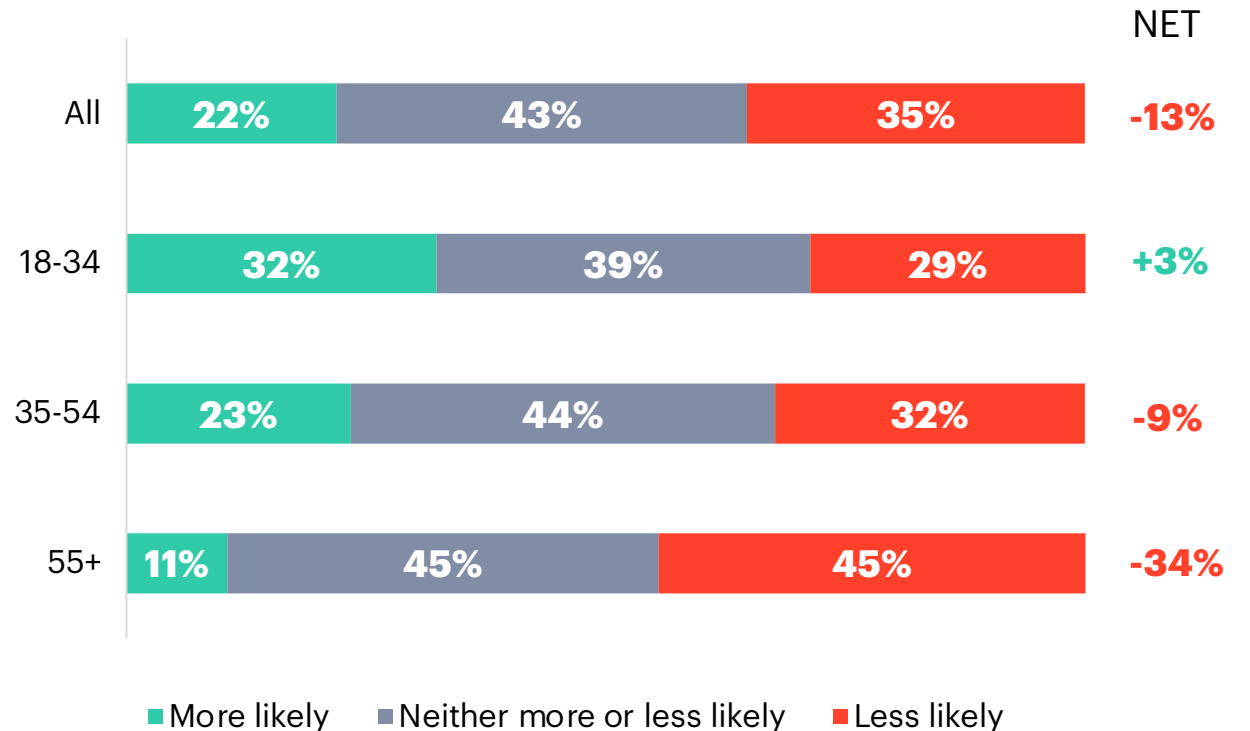
Following the US elections in November 2024, are you more or less likely to consider visiting the United States on your next international trip?

Market	US visit intent change (Nat rep)	US visit intent change (Passport holders)	Difference
All	-13%	-7%	6%
Australia	-11%	0%	11%
Canada	-25%	-21%	4%
Denmark	-37%	-38%	-1%
France	-23%	-16%	7%
GB	-26%	-25%	1%
Germany	-28%	-20%	8%
Hong Kong	17%	19%	2%
India	31%	44%	13%
Indonesia	0%	36%	36%
Italy	-18%	-8%	10%
Mexico	-10%	22%	32%
Poland	5%	11%	6%
Singapore	-29%	-28%	1%
Spain	-24%	-18%	6%
Sweden	-40%	-37%	3%
UAE	38%	36%	-2%

Across 16 markets, older consumers significantly less likely to visit the United States

Consumers aged 18-34 saw increased interest in visiting the United States in the immediate aftermath of the 2024 US election

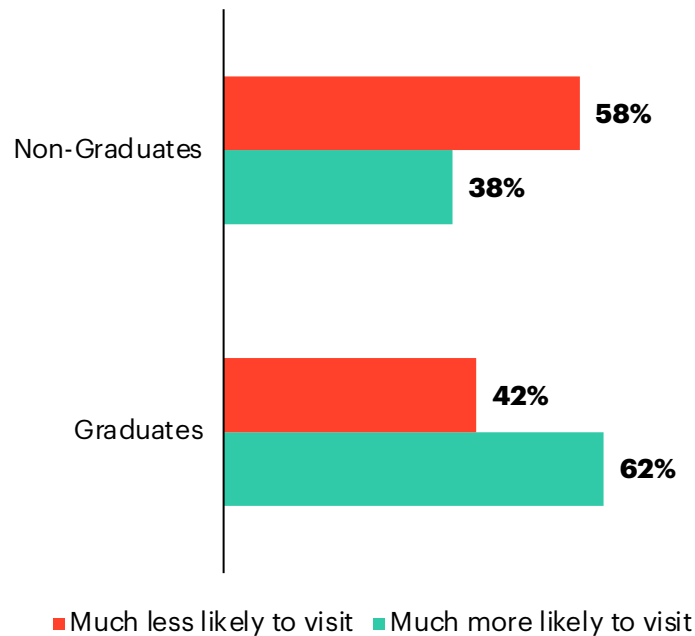
Following the US elections in November 2024, are you more or less likely to consider visiting the United States on your next international trip?



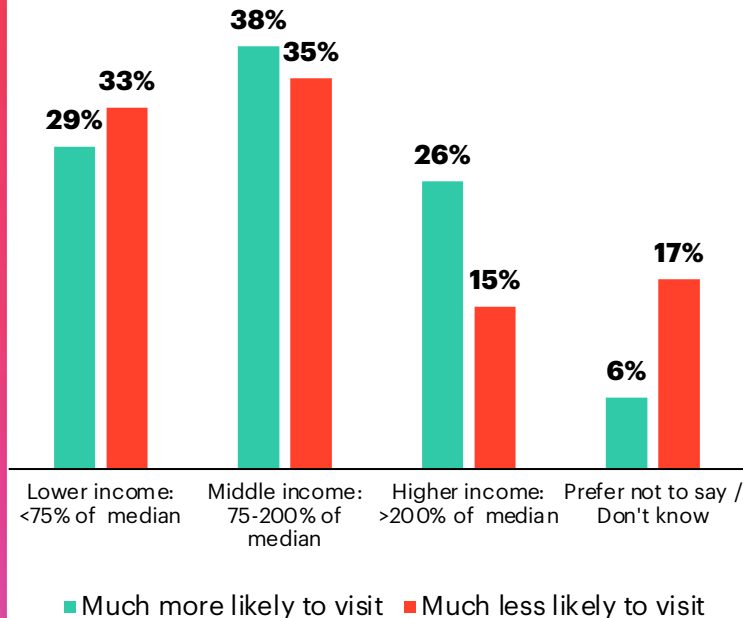
YouGov Surveys: December 16, 2024 – January 2, 2025 (Average of 16 countries. Each age range: n> 5,500). Data re-weighted after removing "Don't know" responses. "All" = unweighted average of 16 markets.

Higher-income, men, and university graduates more likely to have strong positive reactions

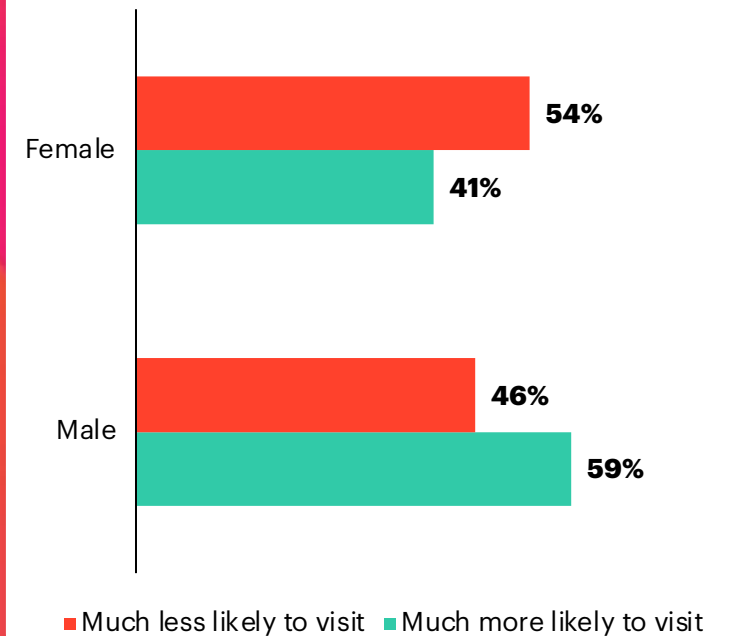
**Strong response to US election
by education (% global)**



**Strong response to US election
by income (% global)**



**Strong response to US election
by gender (% global)**



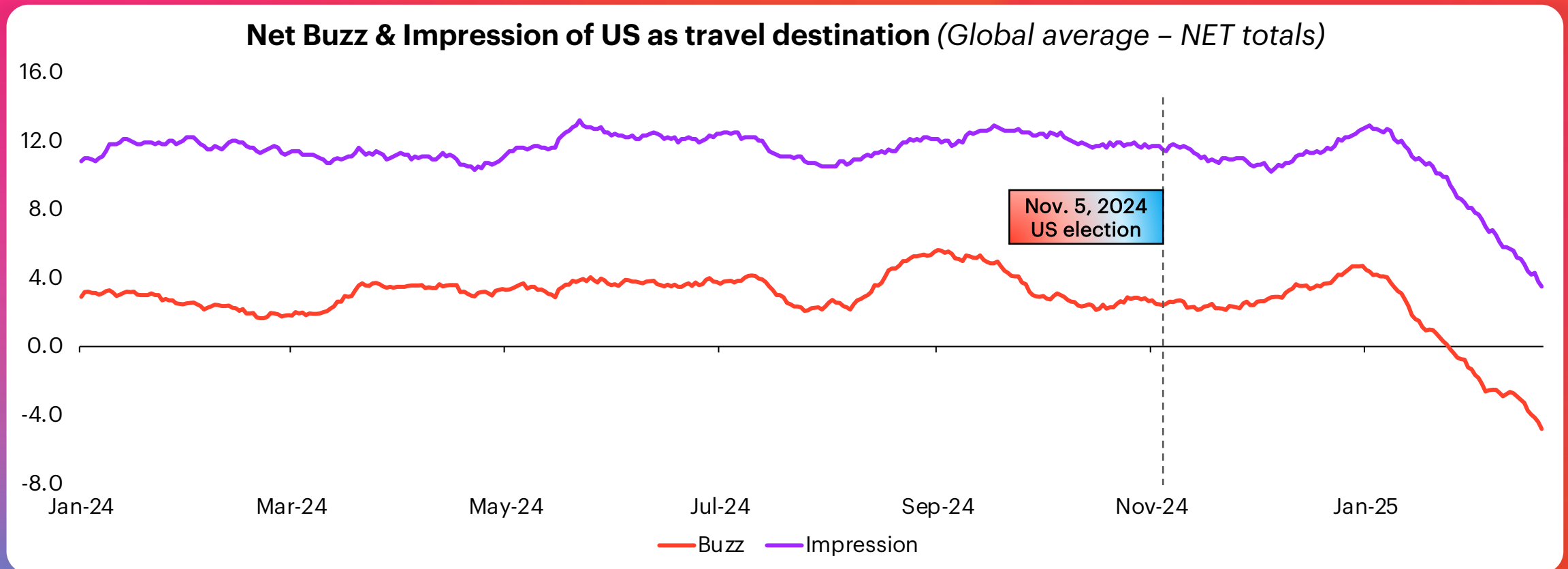
What are people saying now?



Average Buzz & Impression dropping globally

Buzz: Whether a consumer has heard anything positive or negative about a destination in the past two weeks (Two-part question)

Impression: Whether a consumer has a positive or negative impression of a destination (Two-part question)

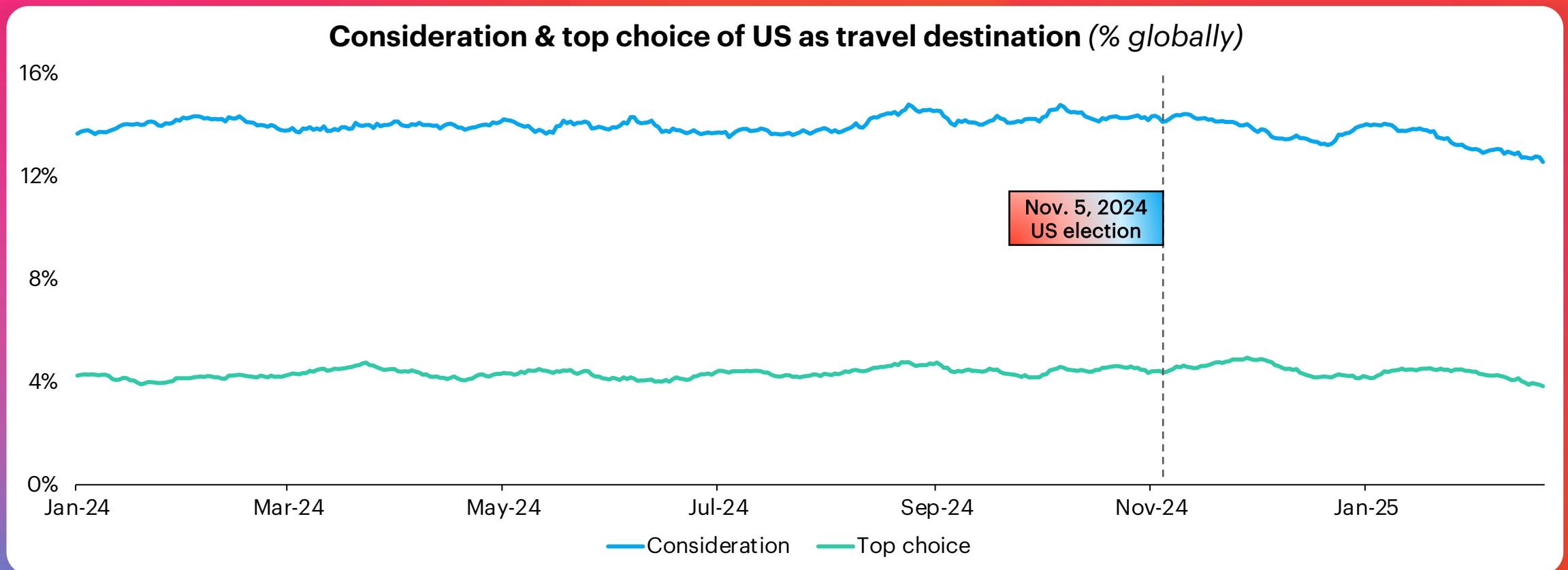


YouGov DestinationIndex. January 1, 2024 – February 20, 2025. Net totals displayed. n> 13,000. Data displayed reflects a 4-week moving average of 29 markets: AE, AU, BR, CA, CH, CL, CN, CO, DE, DK, EG, ES, FI, FR, ID, IN, IT, JP, KR, MX, MY, NL, NO, PH, SA, SE, SG, TH, UK.

Bottom-of-funnel metrics largely un-impacted

Consideration: % of global consumers considering the United States for their next international trip

Top choice: % of global consumers who selected the United States as their top choice for their next international trip



YouGov DestinationIndex. January 1, 2024 – February 20, 2025. Net totals displayed. n> 13,000. Data displayed reflects a 4-week moving average of 29 markets: AE, AU, BR, CA, CH, CL, CN, CO, DE, DK, EG, ES, FI, FR, ID, IN, IT, JP, KR, MX, MY, NL, NO, PH, SA, SE, SG, TH, UK.

India, Egypt, and UAE have seen biggest increases in Impression since election

Rank	Country	Pre-election Impression (NET total)	Post-election Impression (NET total)	Change in Impression
1	India	21.9	26.2	4.3
2	Egypt	-6.5	-2.8	3.7
3	United Arab Emirates	16.7	19.3	2.6
4	China	0.6	2.8	2.2
5	Saudi Arabia	7.3	7.9	0.6

YouGov DestinationIndex. August 1 – November 5, 2024 vs. November 6, 2024 – February 20, 2025. Net totals displayed. Each market: n> 350. Markets measured: AE, AU, BR, CA, CH, CL, CN, CO, DE, DK, EG, ES, FI, FR, ID, IN, IT, JP, KR, MX, MY, NL, NO, PH, SA, SE, SG, TH, UK.

France, Thailand, and Italy have seen biggest increases in Consideration since election

Rank	Country	Pre-election Consideration (% of nat rep)	Post-election Consideration (% of nat rep)	Change in Consideration
1	France	15.6%	16.9%	1.3
2	Thailand	7.5%	8.4%	0.9
3	Italy	10.4%	11.2%	0.8
4	China	4.3%	4.9%	0.6
5	India	14.6%	15.2%	0.6

YouGov DestinationIndex. August 1 – November 5, 2024 vs. November 6, 2024 – February 20, 2025. Each market: n> 350.
Markets measured: AE, AU, BR, CA, CH, CL, CN, CO, DE, DK, EG, ES, FI, FR, ID, IN, IT, JP, KR, MX, MY, NL, NO, PH, SA, SE, SG, TH, UK.

Australia, Germany, and Finland have seen biggest increases in “top choice” since election

Rank	Country	Pre-election “top choice” (% of nat rep)	Post-election “top choice” (% of nat rep)	Change in “top choice”
1	Australia	3.4%	4.3%	0.9
2	Germany	4.1%	5.0%	0.9
3	Finland	1.3%	2.1%	0.8
4	Switzerland	2.8%	3.5%	0.7
5	India	3.4%	4.1%	0.7

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What about key travel markets?



Brits “much less likely” to visit US increased by 7 percentage-points since Trump took office

Following the US elections in November 2024, are you more or less likely to consider visiting the United States on your next international trip? (% of GB nat rep)

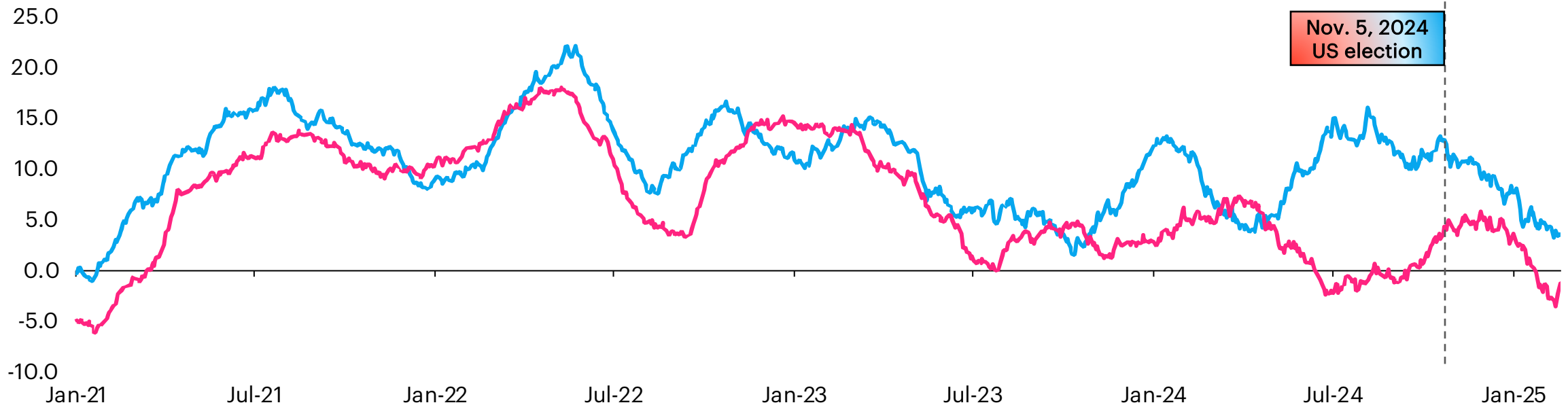
Consideration for US trip	GB nat rep: Dec 2024	GB nat rep: Feb 2025	Difference
Much more likely	6.6%	6.8%	0.2
Somewhat more likely	7.2%	7.0%	-0.2
Neither more nor less likely	46.2%	40.5%	-5.7
Somewhat less likely	11.5%	10.3%	-1.2
Much less likely	28.5%	35.5%	7.0

YouGov Surveys: December 16, 2024 – January 2, 2025. GB nat rep: n> 2,000.
YouGov Surveys: February 17, 2025. GB nat rep: n> 2,100.

Net Impression of US as travel destination among Brits by gender

Overall, of which of the following destinations do you have a **POSITIVE** impression? / Now which of the following destinations do you have an overall **NEGATIVE** impression? (*NET total displayed*)

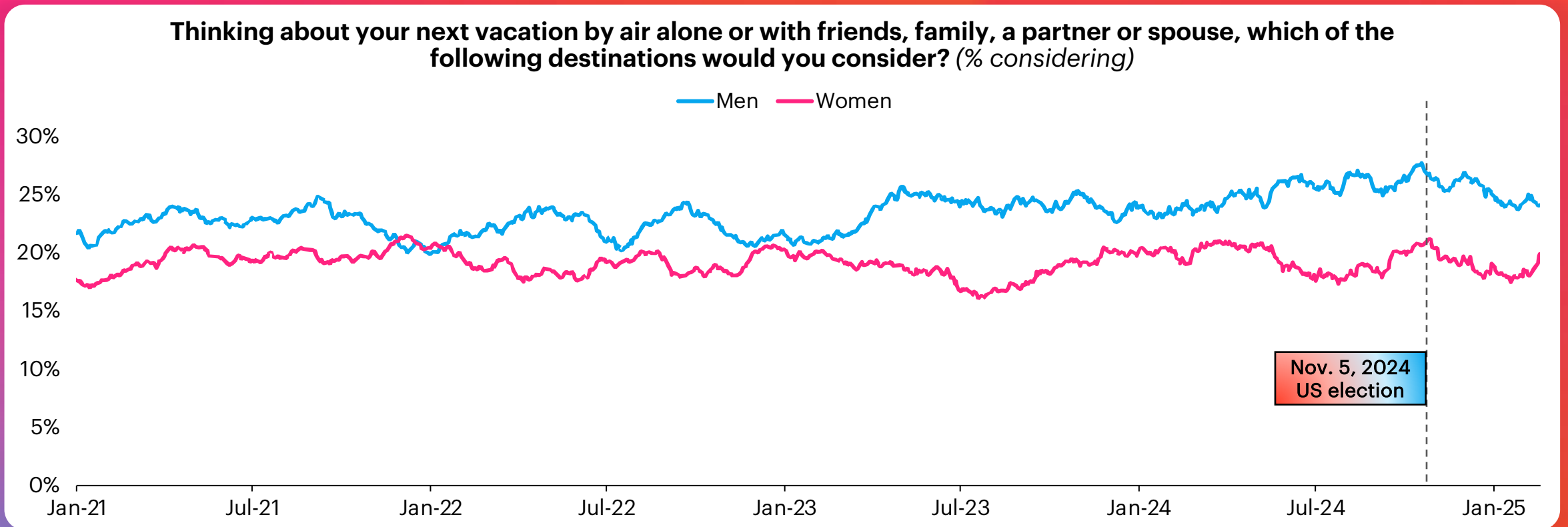
— Men — Women



YouGov DestinationIndex UK: January 1, 2021 – February 17, 2025. GB men: n> 1,300; GB women: n> 1,400.
Data displayed reflects a 12-week moving average.

[Explore destination tracking](#)

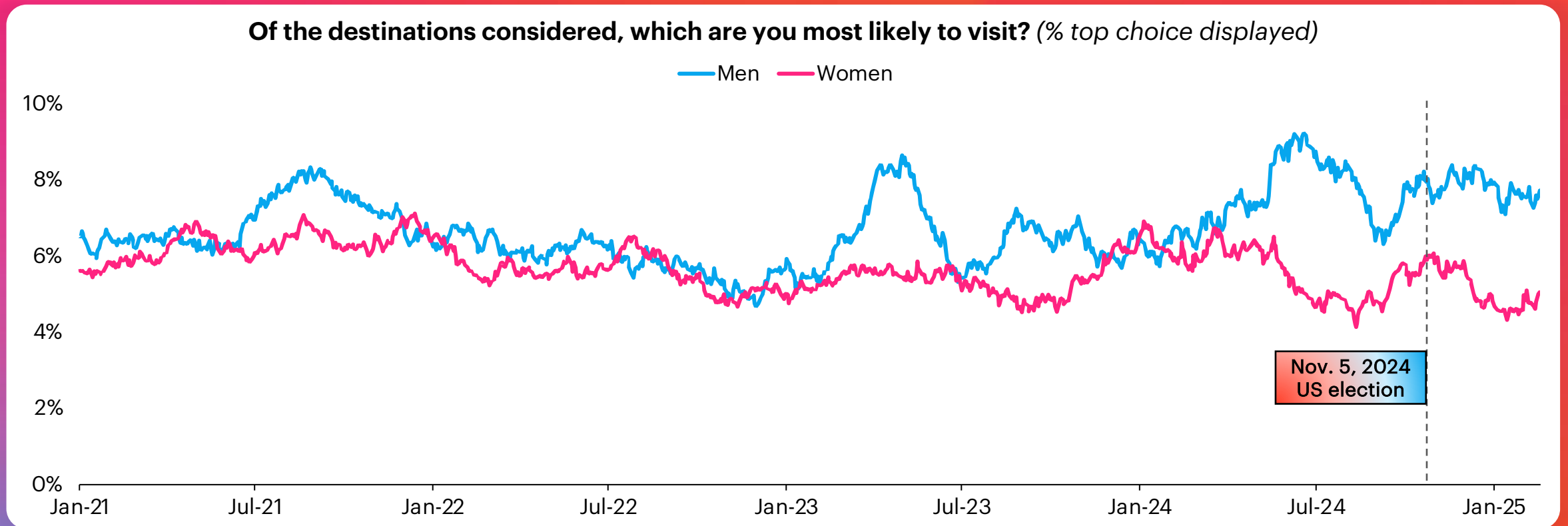
Consideration of US as travel destination among Brits by gender



YouGov DestinationIndex UK: January 1, 2021 – February 17, 2025. GB men: n> 1,300; GB women: n> 1,400.
Data displayed reflects a 12-week moving average.

[Explore destination tracking](#)

United States as top travel destination choice among Brits by gender



YouGov DestinationIndex UK: January 1, 2021 – February 17, 2025. GB men: n> 1,300; GB women: n> 1,400.
Data displayed reflects a 12-week moving average.

[Explore destination tracking](#)

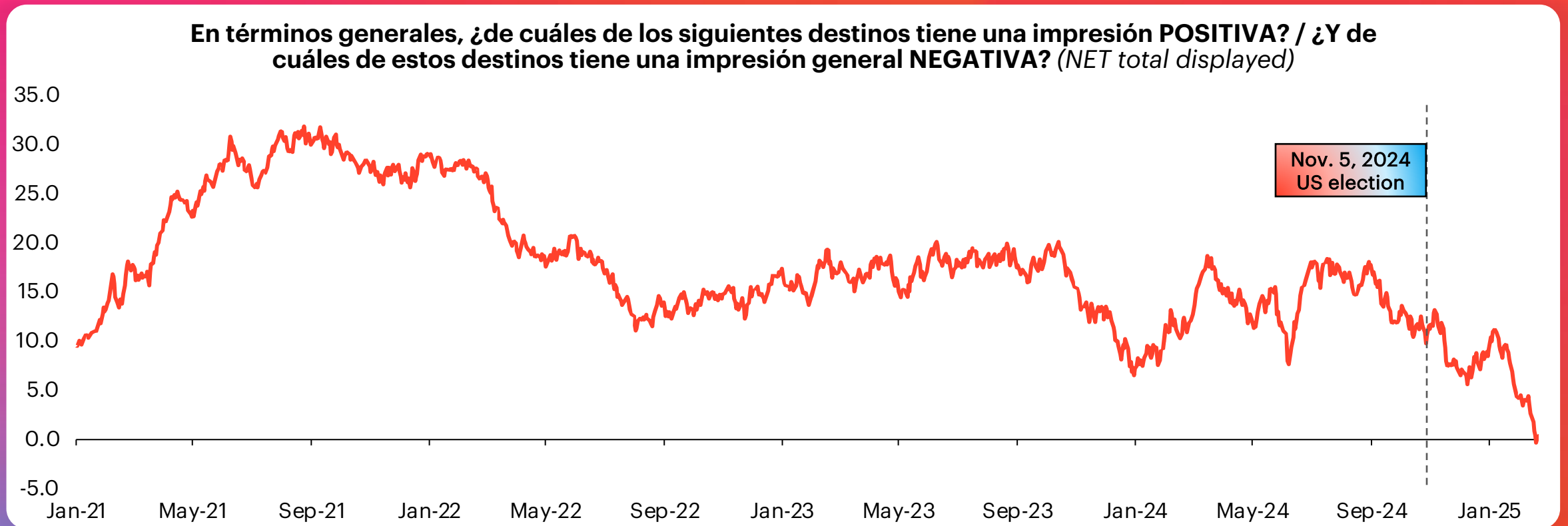
55% of Mexicans are less likely to consider visiting the US, up from 36% two months ago

Following the US elections in November 2024, are you more or less likely to consider visiting the United States on your next international trip? (% of MX nat rep – Urban only)

Consideration for US trip	MX nat rep: Dec 2024	MX nat rep: Feb 2025	Difference
Much more likely	10.2%	10.5%	0.3
Somewhat more likely	15.9%	10.3%	-5.6
Neither more nor less likely	37.6%	23.9%	-13.7
Somewhat less likely	10.1%	15.1%	5.0
Much less likely	26.2%	40.2%	14.0

YouGov Surveys: December 16, 2024 – January 2, 2025. MX nat rep (urban-only): n> 900.
YouGov Surveys: February 12-24, 2025; MX nat rep (urban-only): n> 825.

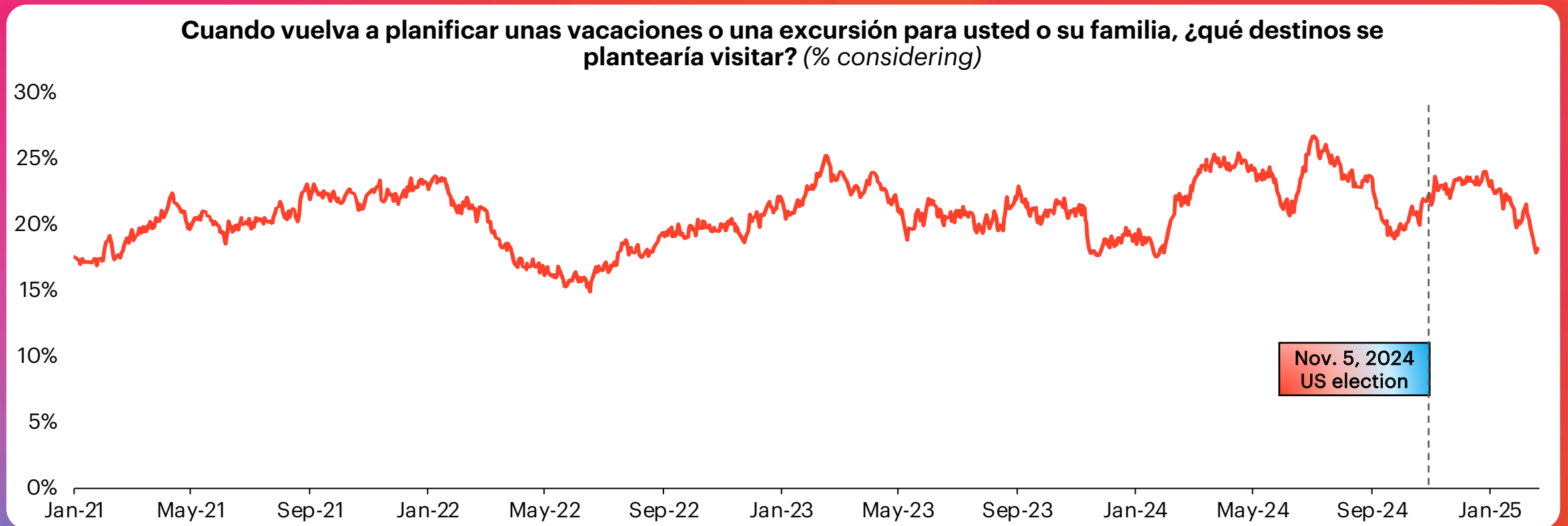
Net Impression of US as travel destination among Mexicans



YouGov DestinationIndex MX: January 1, 2021 – February 13, 2025. MX nat rep (urban-only): n> 350.
Data displayed reflects a 12-week moving average.

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Consideration of US as travel destination among Mexicans



YouGov DestinationIndex MX: January 1, 2021 – February 13, 2025. MX nat rep (urban-only): n> 350.
Data displayed reflects a 12-week moving average.

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United States as top travel destination choice among Mexicans

De los destinos que se ha planteado, ¿cuál es más probable que visite? (% top choice displayed)



YouGov DestinationIndex MX: January 1, 2021 – February 13, 2025. MX nat rep (urban-only): n> 350.
Data displayed reflects a 12-week moving average.

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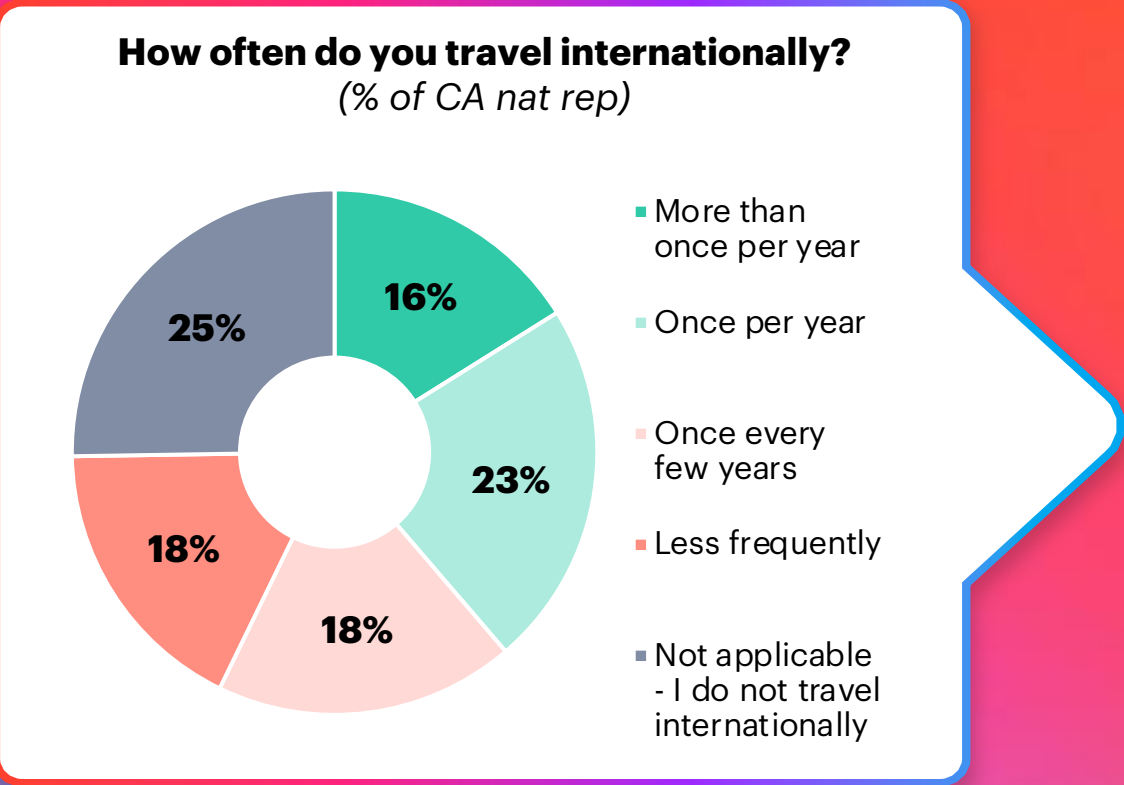
53% of Canadians are “much less likely” to consider US visit, up from 33% two months ago

Following the US elections in November 2024, are you more or less likely to consider visiting the United States on your next international trip? (% of CA nat rep)

Consideration for US trip	CA nat rep: Dec 2024	CA nat rep: Feb 2025	Difference
Much more likely	8.9%	8.2%	-0.7
Somewhat more likely	10.4%	8.6%	-1.8
Neither more nor less likely	36.1%	20.5%	-15.6
Somewhat less likely	11.3%	10.2%	-1.1
Much less likely	33.2%	52.5%	19.3

YouGov Surveys: December 16, 2024 – January 2, 2025. CA nat rep: n> 900
YouGov Surveys: February 12-24, 2025; CA nat rep: n> 925.

Two-fifths of international travelers from Canada (41%) are less likely to consider US trip



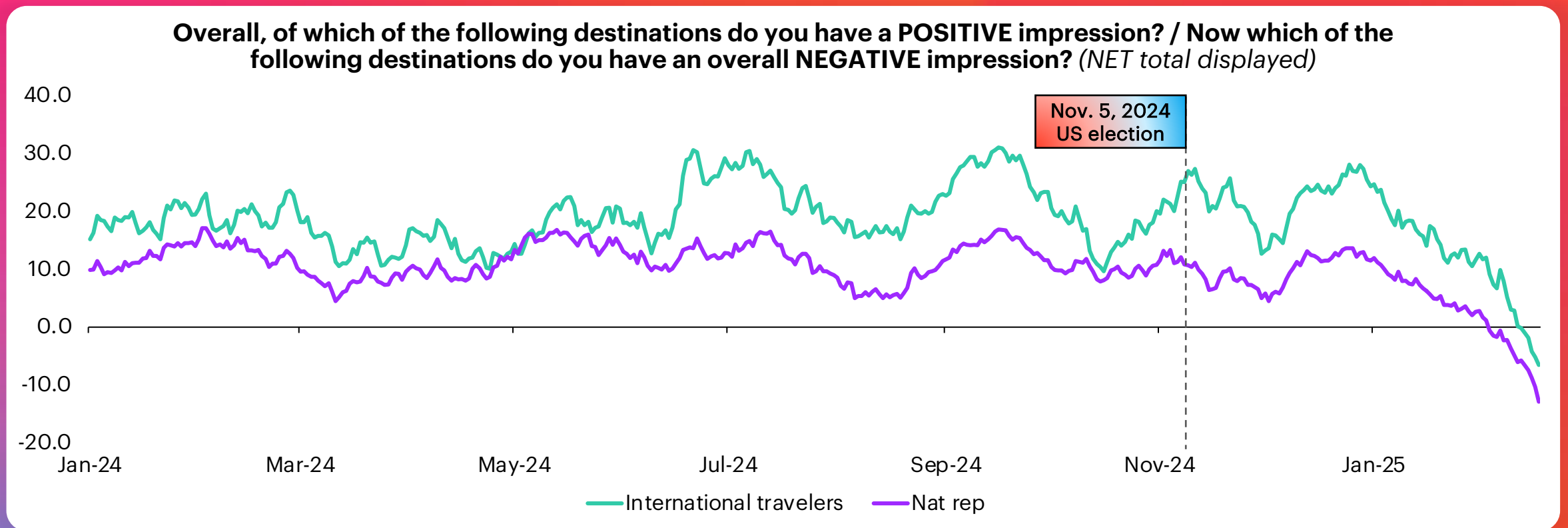
Following the US elections in November 2024, are you more or less likely to consider visiting the United States on your next international trip? (% of annual CA international travelers)

Consideration for US trip	Annual CA international travelers	NET
Much more likely	13.1%	26.6%
Somewhat more likely	13.5%	
Neither more nor less likely	20.5%	20.5%
Somewhat less likely	12.5%	53.0%
Much less likely	40.5%	

YouGov Surveys: February 12-24, 2025; Annual CA international travelers (Take 1+ international trip annually): n> 375.
Visit consideration data re-weighted after removing "Not sure" responses (7.2%).

Get in touch

Net Impression of US as tourist destination by Canadians



YouGov DestinationIndex. January 1, 2024 – February 17, 2025.

CA international travelers: Planning an international trip in next 12 months (n> 150). Data displayed reflects a 4-week moving average.

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Consideration of US as tourist destination by Canadians



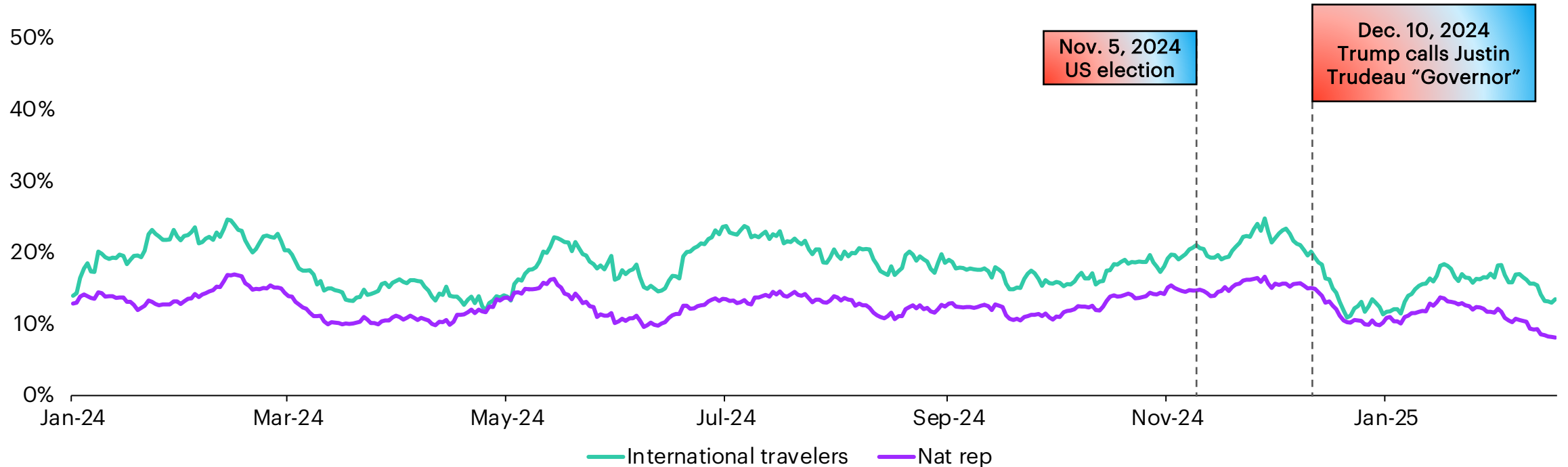
YouGov DestinationIndex. January 1, 2024 – February 17, 2025.

CA international travelers: Planning an international trip in next 12 months (n> 150). Data displayed reflects a 4-week moving average.

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United States as top travel destination choice among Canadians

Of the destinations considered, which are you most likely to visit? (% top choice displayed)



YouGov DestinationIndex. January 1, 2024 – February 17, 2025.

CA international travelers: Planning an international trip in next 12 months (n> 150). Data displayed reflects a 4-week moving average.

[Explore destination tracking](#)

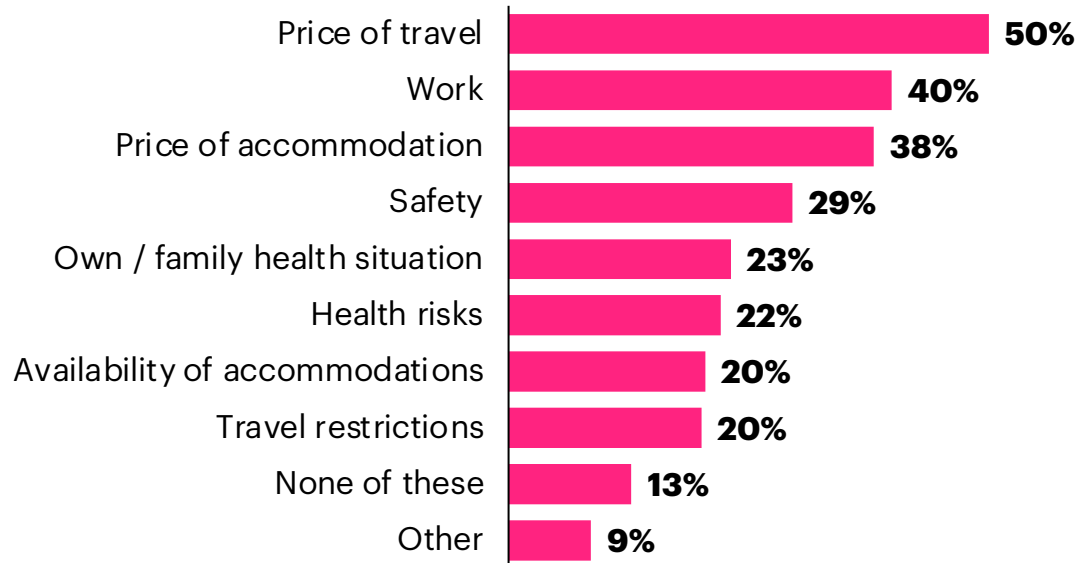
Who is the US international visitor in 2025?



34% of international visitors considering US book last minute, citing price and work as top barriers

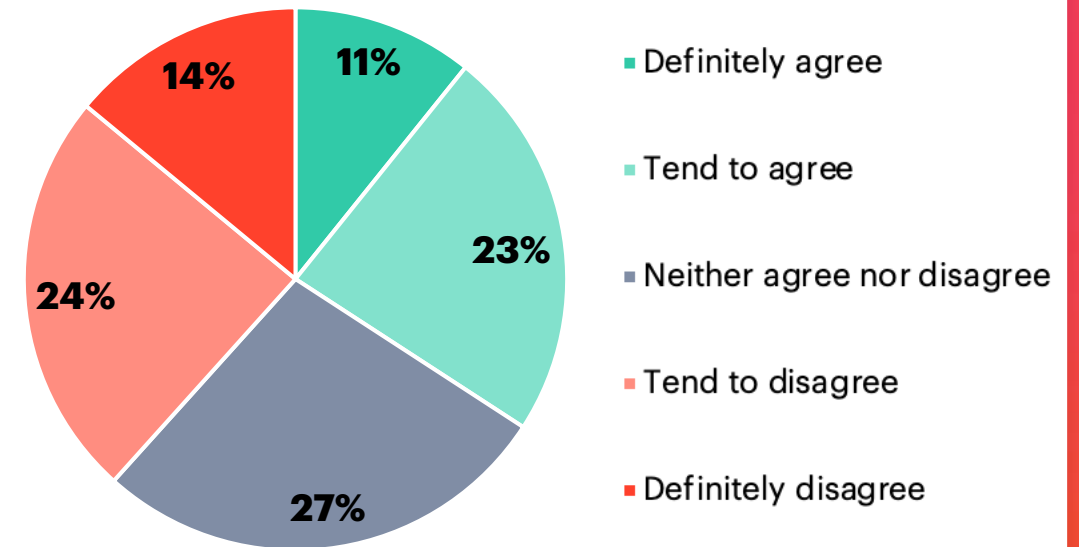
Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply.

(% of international travelers considering US since Nov 2024)



"I usually wait for last minute deals rather than planning my holiday/holidays or short break in advance"

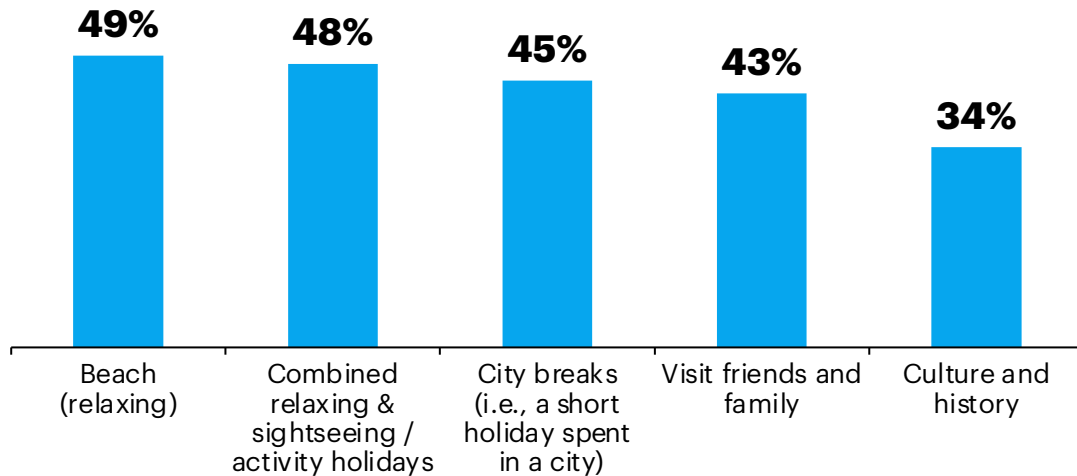
(% of international travelers considering US since Nov 2024)



Majorities of international travelers considering the US want relaxation and/or physical activity

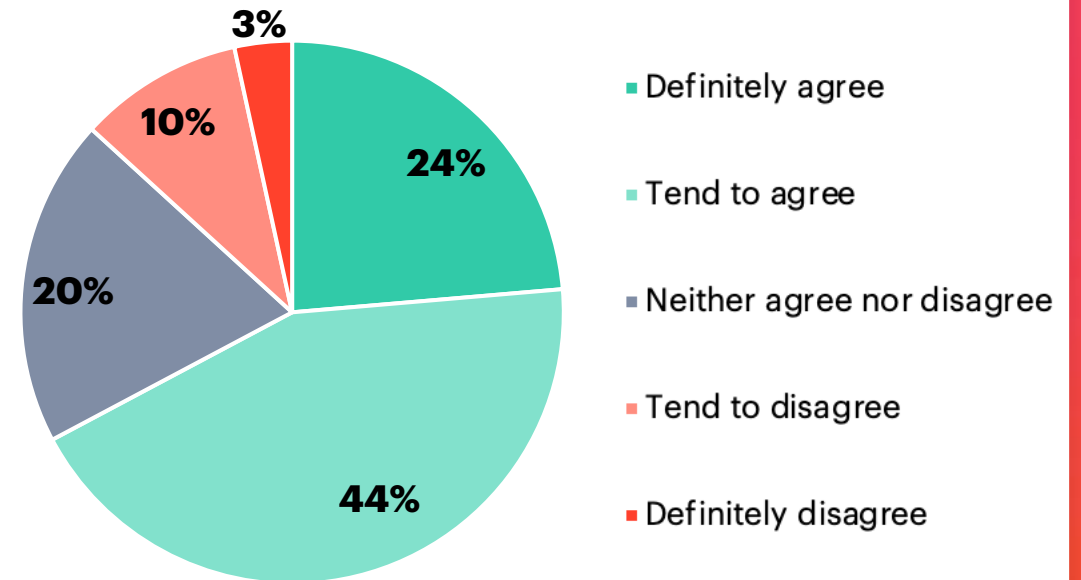
Thinking more generally about the holidays that you go on, not just those that you have taken in the last 12 months, which, if any, of the following **types of holidays do you typically take? Please select all that apply.**

(% of International travelers considering US since Nov 2024)



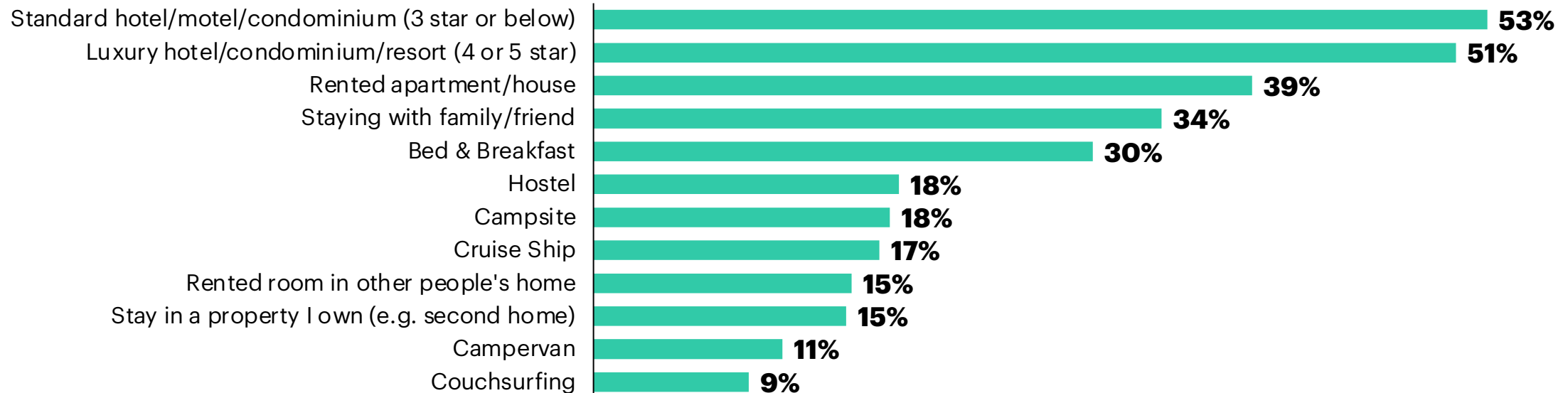
"I like my holiday to have some form of physical activity"

(% of International travelers considering US since Nov 2024)



Prospective international US visitors look outside of hotels for typical vacation stays

Which, if any, of the following types of accommodation do you typically stay in when you are on holiday?
Please select all that apply. (% of International travelers considering US since Nov 2024)



Thank you

/Research Reality

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