

Aug 2025



International traveler sentiment revisited

A fresh outlook on the “Trump effect”

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- 02** How is foreign visitor sentiment tracking?
- 03** How has this trended over time?
- 04** Zooming in on key travel markets
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Methodology

Leveraging YouGov's proprietary consumer research panel of 30+ 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

Jun 2025: 16 markets

DestinationIndex

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

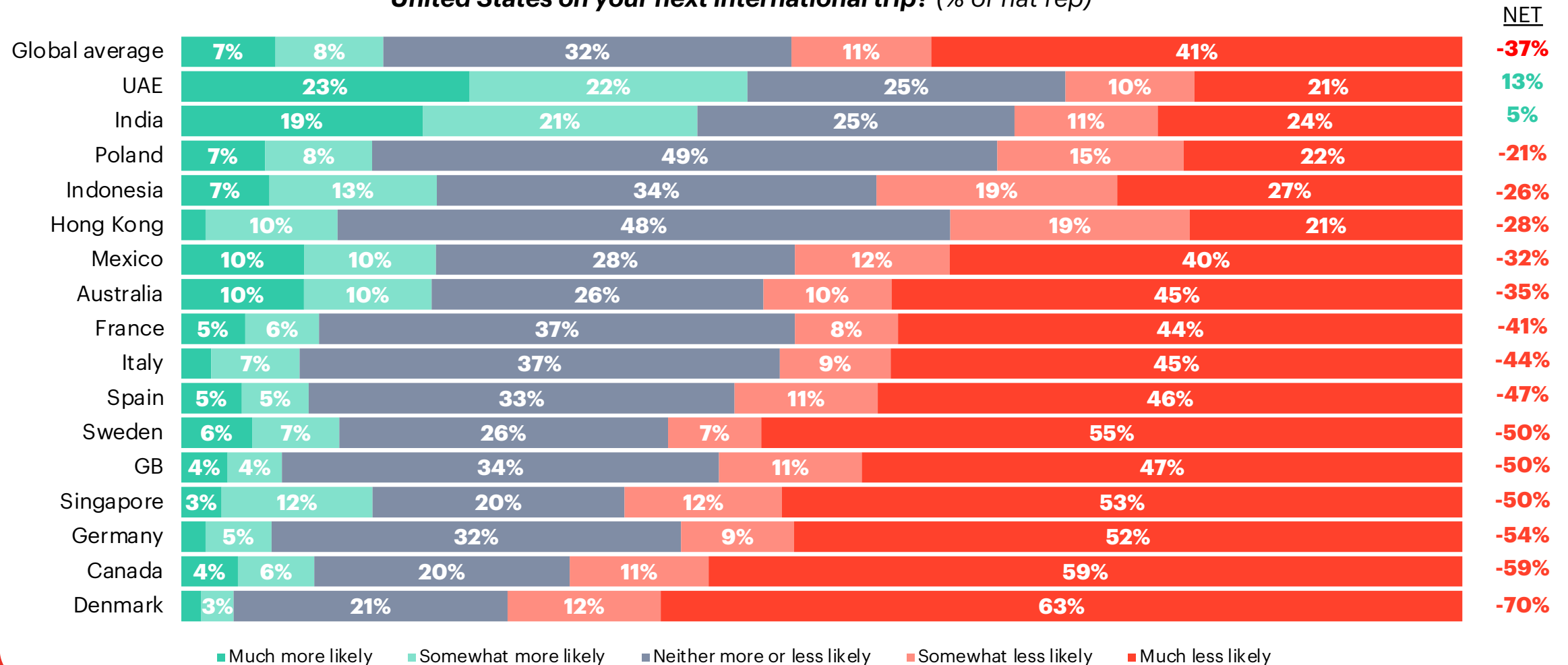
In this presentation:

- Global averages
- Focus on CA, UK, MX

How is foreign visitor sentiment tracking?



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)



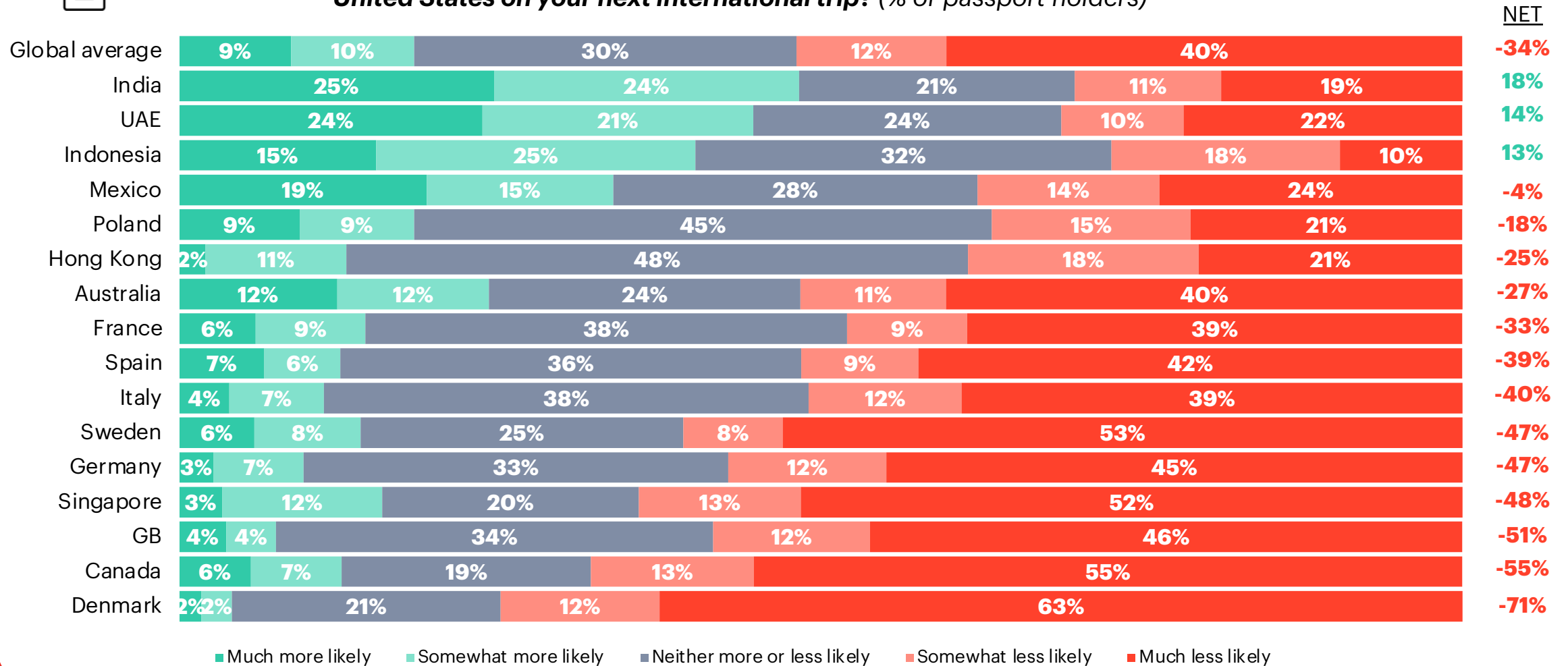
YouGov Surveys: June 13 - July 7, 2025. Re-weighted after removing "Don't know" responses. Each market: n> 450.

Nat rep from each market (IN & MX: Urban representative; ID & HK: Online representative). Global average = unweighted average of 16 markets.

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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)



YouGov Surveys: June 13 - July 7, 2025. Re-weighted after removing "Don't know" responses. (Passport holders in each market: n> 375)
 Nat rep from each market (IN & MX: Urban representative; ID & HK: Online representative). Global average = unweighted average of 16 markets.

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Passport holders less likely to be impacted by US administration changes, but still more deterred

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

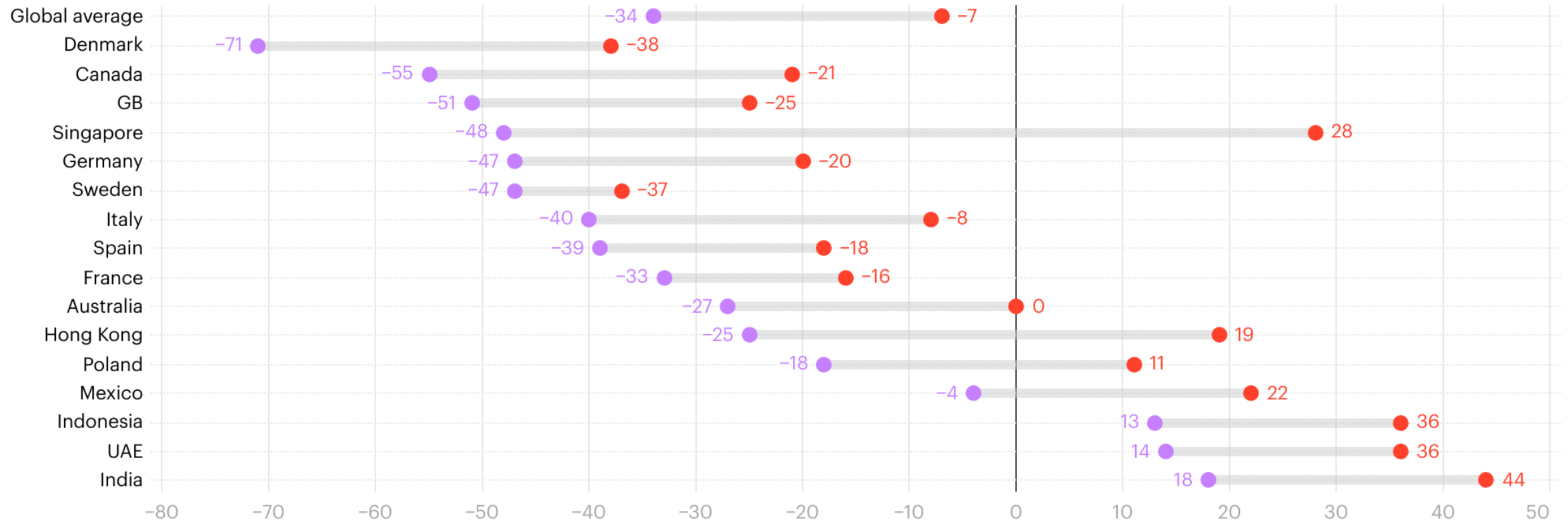
YouGov Surveys: June 13 - July 7, 2025. Re-weighted after removing "Don't know" responses. Each market: n> 450
Passport holders in each market: n> 375
Global average = unweighted average of 16 markets.

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
Global average	-37%	-34%	3%
Australia	-35%	-27%	8%
Canada	-59%	-55%	4%
Denmark	-70%	-71%	0%
France	-41%	-33%	8%
GB	-50%	-51%	-1%
Germany	-54%	-47%	6%
Hong Kong	-28%	-25%	2%
India	5%	18%	13%
Indonesia	-26%	13%	39%
Italy	-44%	-40%	4%
Mexico	-32%	-4%	28%
Poland	-21%	-18%	3%
Singapore	-50%	-48%	2%
Spain	-47%	-39%	8%
Sweden	-50%	-47%	3%
UAE	13%	14%	0%



Change in likelihood to visit United States: **January 2025** vs **July 2025** (Net likelihood among passport holders)



YouGov Surveys: June 13 - July 7, 2025 vs Dec 16, 2024 – Jan 2, 2025. Re-weighted after removing "Don't know" responses.
Passport holders in each market: n> 375. Global average = unweighted average of 16 markets.

[Talk to a researcher](#)

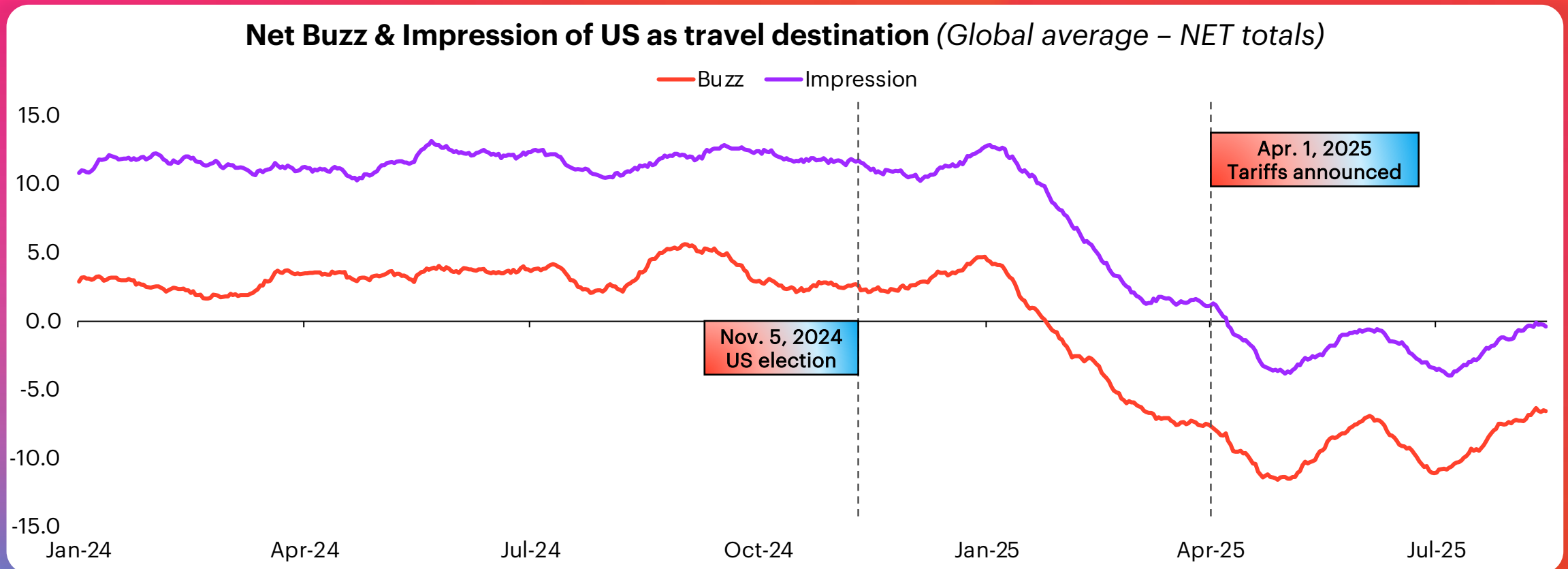
How has this trended over time?



Average Buzz & Impression may be rebounding

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)

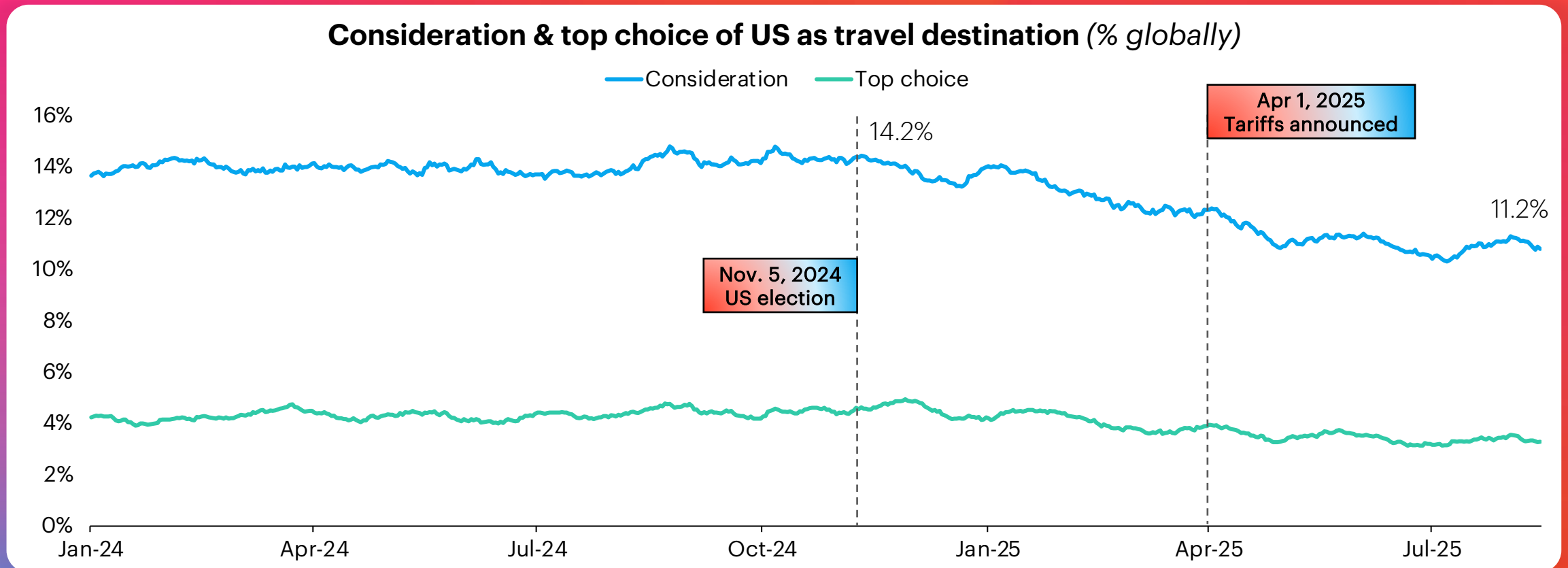


YouGov DestinationIndex. January 1, 2024 – August 14, 2025. Net totals displayed. n> 13,000. Data displayed reflects a 4-week moving average of 29 markets: AE, AU, BR, CA, CH, CL, CN, CO, DE, DK, EG, ES, FI, FR, ID, IN, IT, JP, KR, MX, MY, NL, NO, PH, SA, SE, SG, TH, UK.

Bottom-of-funnel metrics starting to decline

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 – August 14, 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.

China shows largest YoY increase in Impression of US as a travel destination

Rank	Country	2025 Impression (NET total)	2024 Impression (NET total)	Change in Impression
1	China	3.6	0.4	+3.2
2	Saudi Arabia	7.7	6.9	+0.8
3	Thailand	13.7	13.1	+0.6
4	Egypt	-5.5	-5.9	+0.4
5	Indonesia	-1.9	-1.6	-0.3

YouGov BrandIndex: August 15, 2024 - August 14, 2025 vs August 16, 2023 vs August 14, 2024. Net totals displayed. Nat rep for each market: n> 1,200. 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.

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Consideration for visiting US growing among some of world’s most populous markets

Rank	Country	2025 Consideration (% of nat rep)	2024 Consideration (% of nat rep)	Change in Consideration
1	China	5.2%	3.8%	+1.4
2	India	15.2%	14.0%	+1.2
3	Brazil	26.2%	25.3%	+0.9
4	Saudi Arabia	12.2%	11.5%	+0.7
5	Switzerland	11.5%	11.1%	+0.4

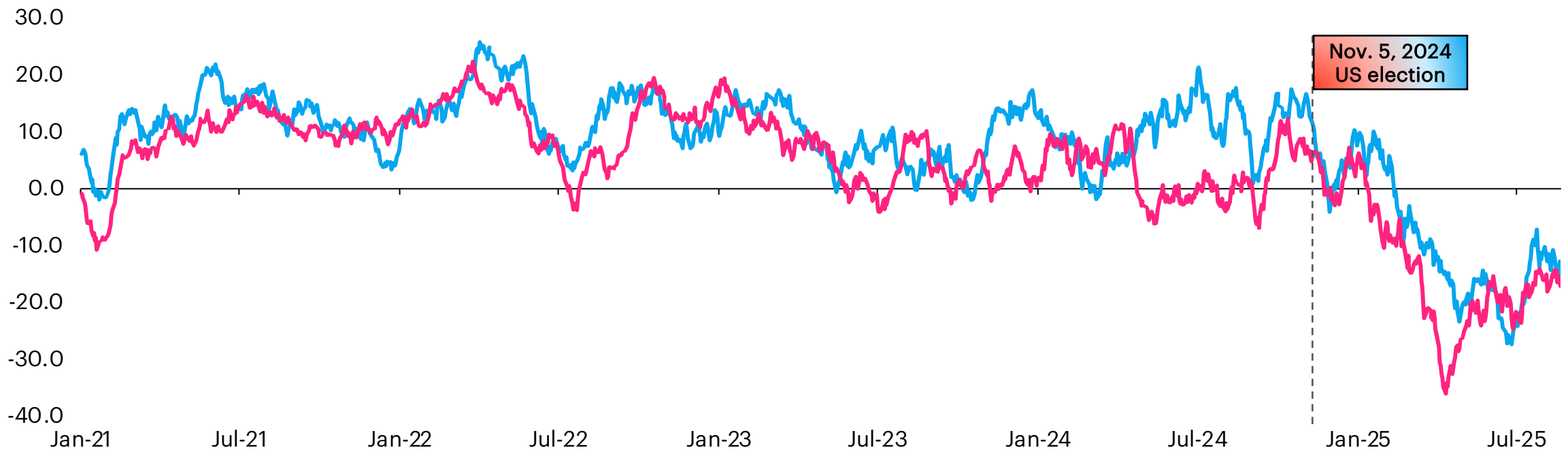
What about key travel markets?



GB: 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*)

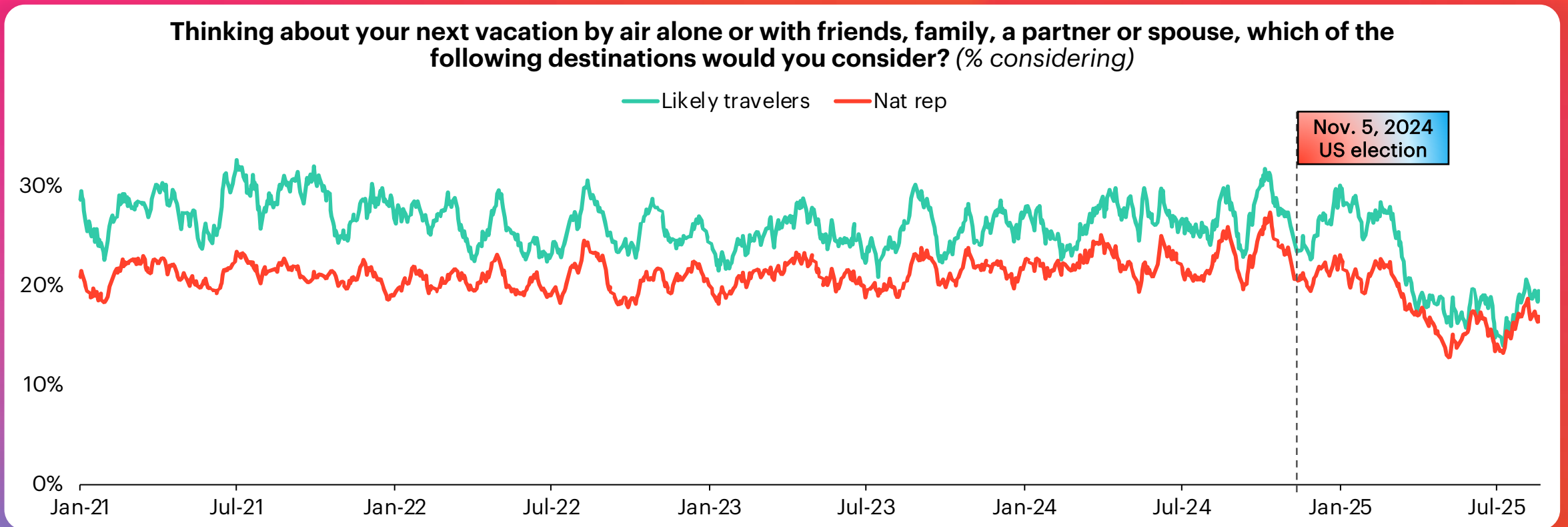
— Men — Women



YouGov DestinationIndex UK: January 1, 2021 – August 20, 2025. UK men: n> 425; UK women: n> 425.
Data displayed reflects a 4-week moving average.

[Explore destination tracking](#)

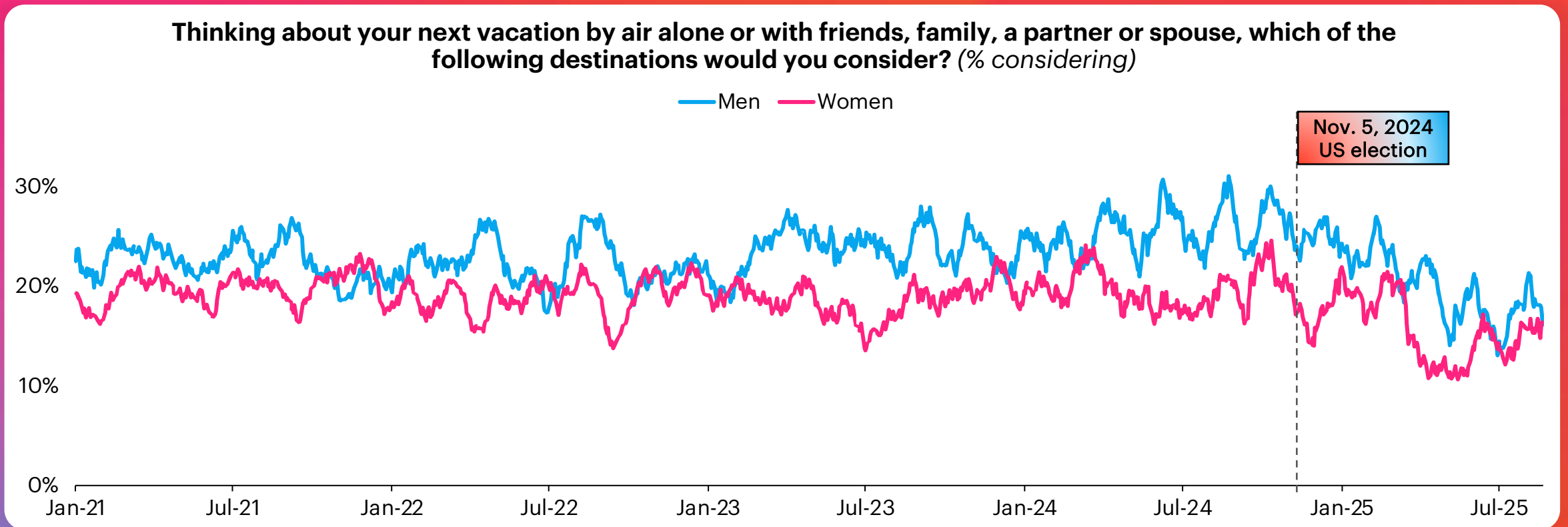
GB: Consideration of US as travel destination among Brits who are likely to travel



YouGov DestinationIndex UK: January 1, 2021 – August 20, 2025. UK nat rep: n> 900; UK likely travelers: (Very likely or likely): n> 375. Data displayed reflects a 4-week moving average.

[Explore destination tracking](#)

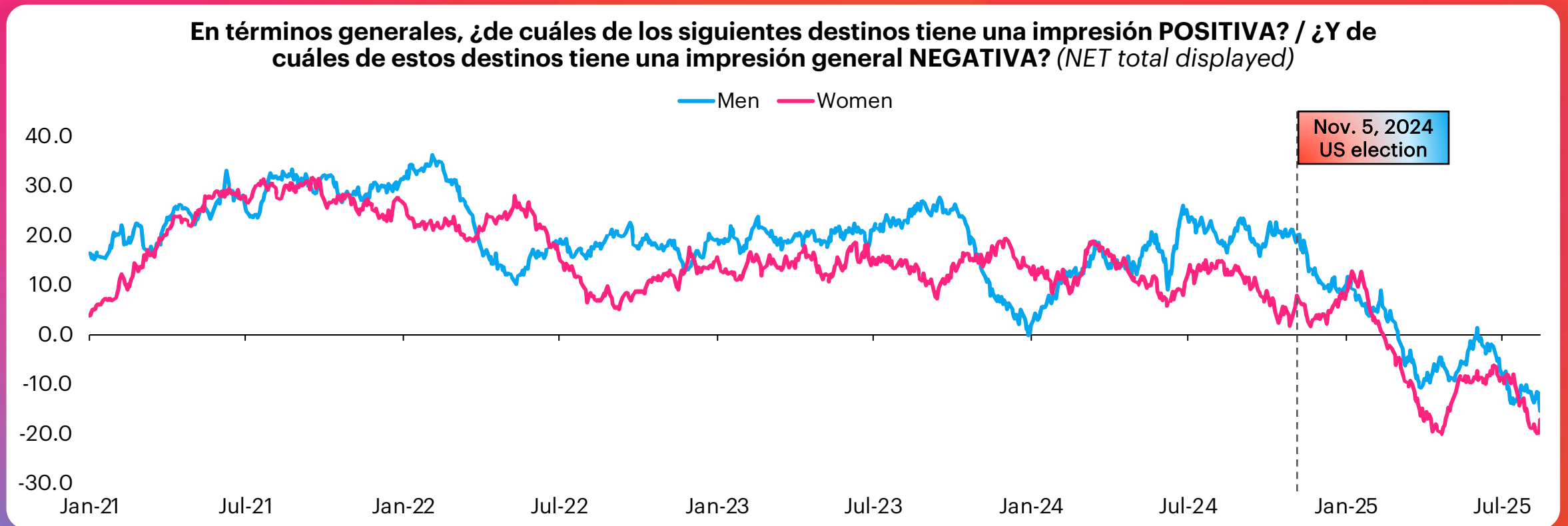
GB: Consideration of US as travel destination among Brits by gender



YouGov DestinationIndex UK: January 1, 2021 – August 20, 2025. UK men: n> 425; UK women: n> 425.
Data displayed reflects a 4-week moving average.

[Explore destination tracking](#)

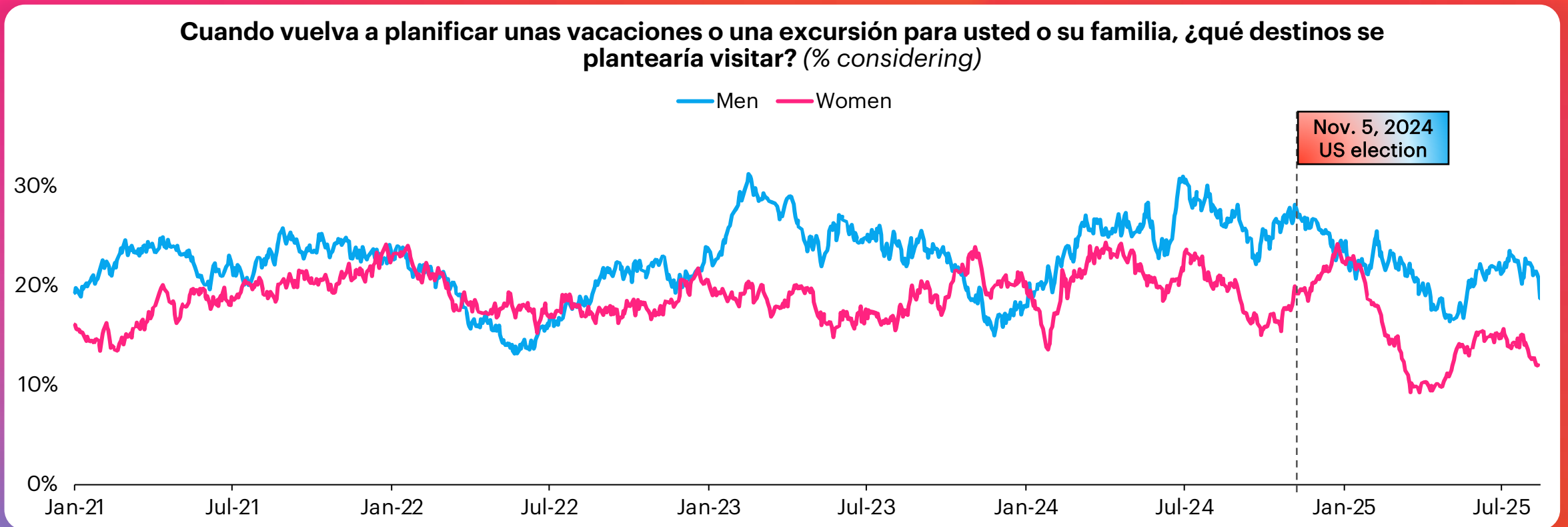
MX: Net Impression of US as travel destination among Mexicans by gender



YouGov DestinationIndex MX: January 1, 2021 – August 14, 2025. MX men (urban-only): n> 150; MX women (urban-only): n> 150. Data displayed reflects a 12-week moving average.

[Explore destination tracking](#)

MX: Consideration of US as travel destination among Mexicans by gender

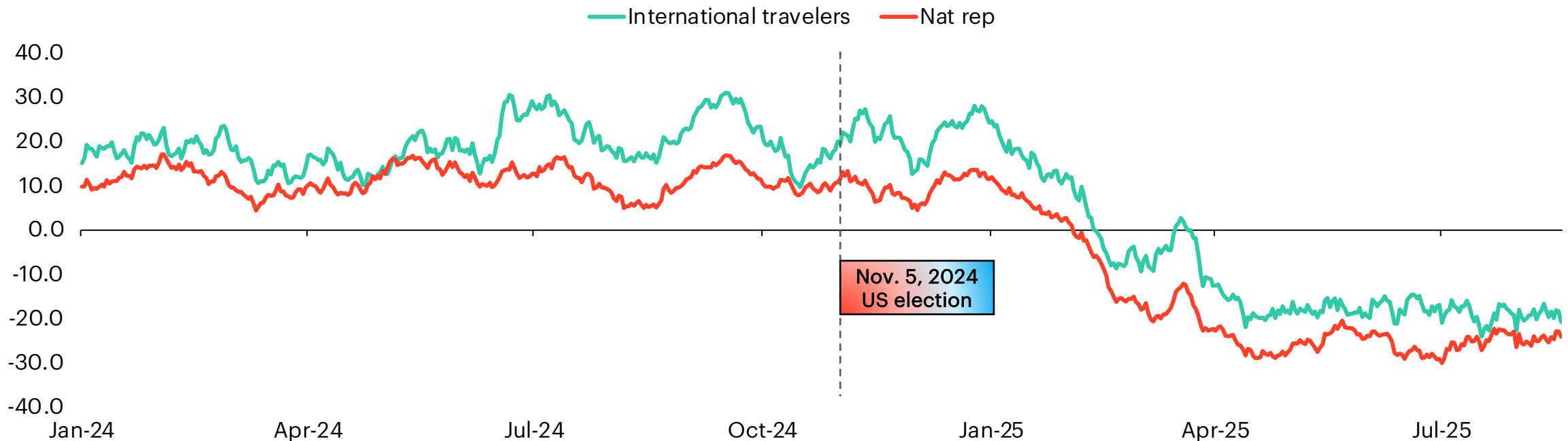


YouGov DestinationIndex MX: January 1, 2021 – August 14, 2025. MX men (urban-only): n> 150; MX women (urban-only): n> 150. Data displayed reflects a 12-week moving average.

[Explore destination tracking](#)

CA: Net Impression of US as tourist destination among Canadians who travel internationally

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)



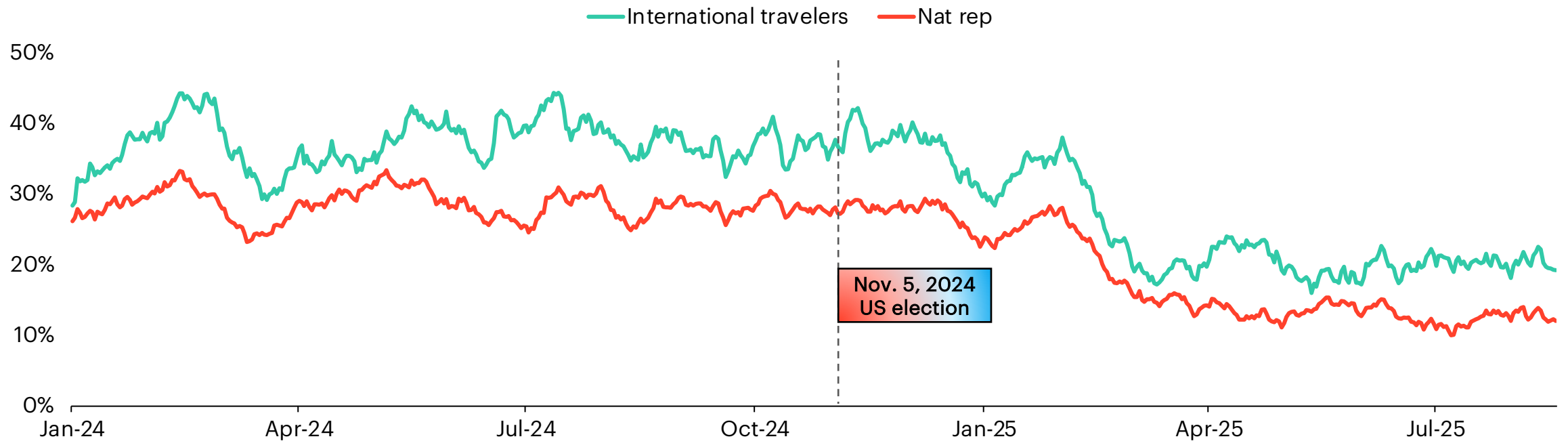
YouGov DestinationIndex. January 1, 2024 – August 18, 2025.

CA international travelers: Planning an international trip in next 12 months (n> 100). Data displayed reflects a 4-week moving average.

[Explore destination tracking](#)

CA: Consideration of US as tourist destination among Canadians who travel internationally

When you are in the market next to plan a holiday or a fun day out for yourself / your family, which destinations would you consider? (% considering)



YouGov DestinationIndex. January 1, 2024 – August 18, 2025.

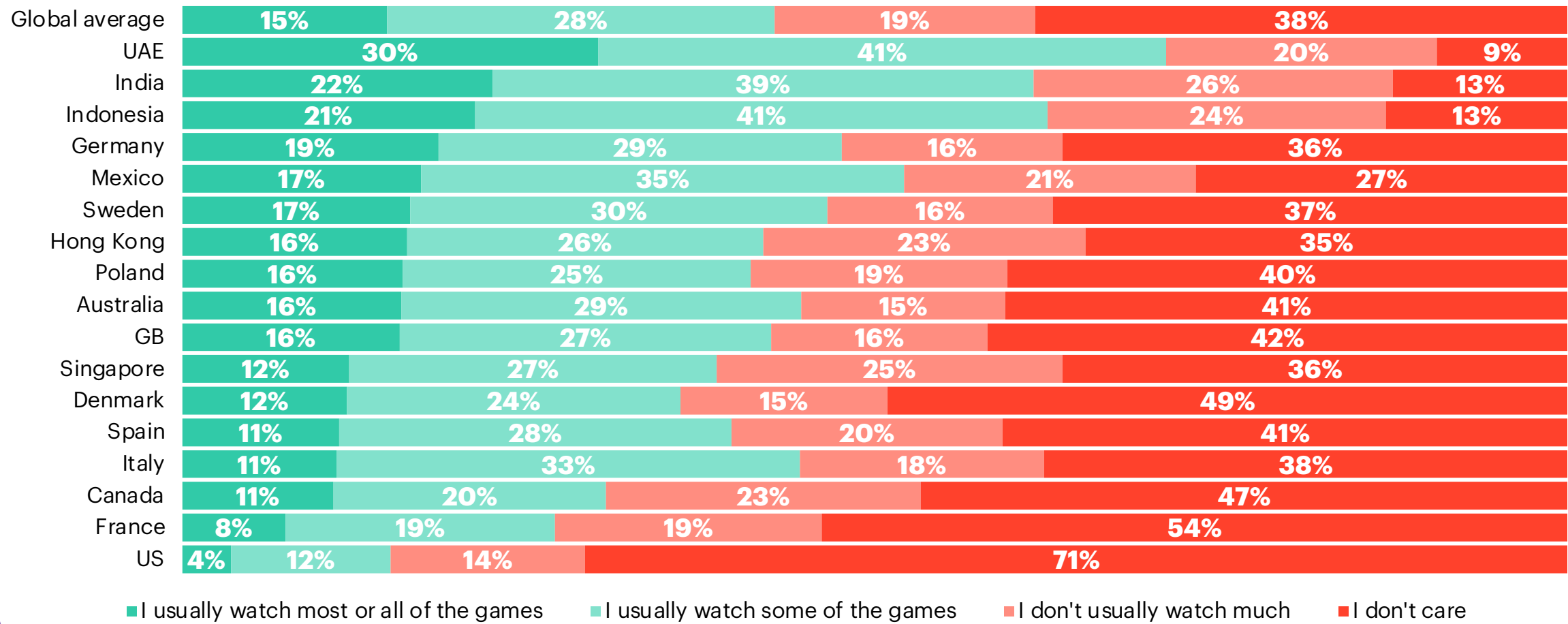
CA international travelers: Planning an international trip in next 12 months (n> 100). Data displayed reflects a 4-week moving average.

[Explore destination tracking](#)

FIFA World Cup travel preview



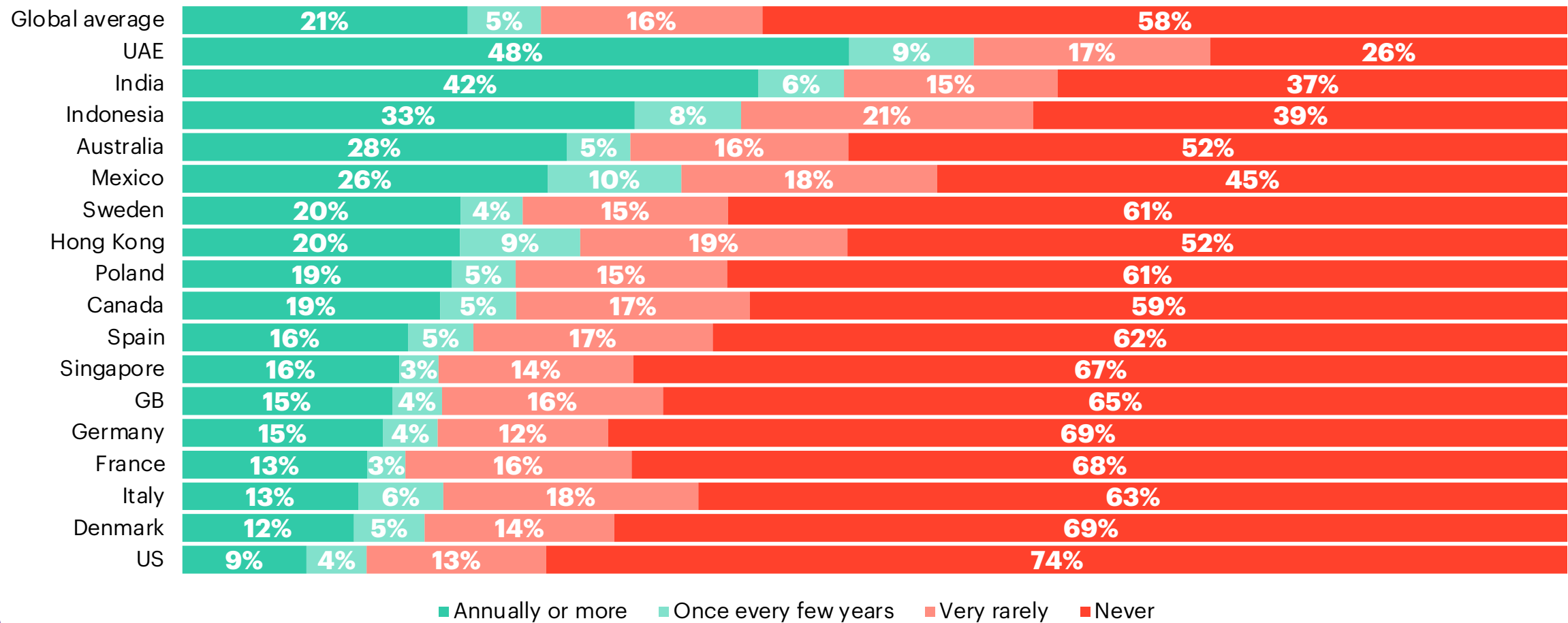
Which of the following best describes your level of viewership of The FIFA World Cup?
(% of nat rep)



YouGov Surveys: June 13 - July 7, 2025. Re-weighted after removing "Don't know" responses. Each market: n> 450.
Nat rep from each market (IN & MX: Urban representative; ID & HK: Online representative).
Global average = unweighted average of 17 markets.

Request FIFA World Cup data

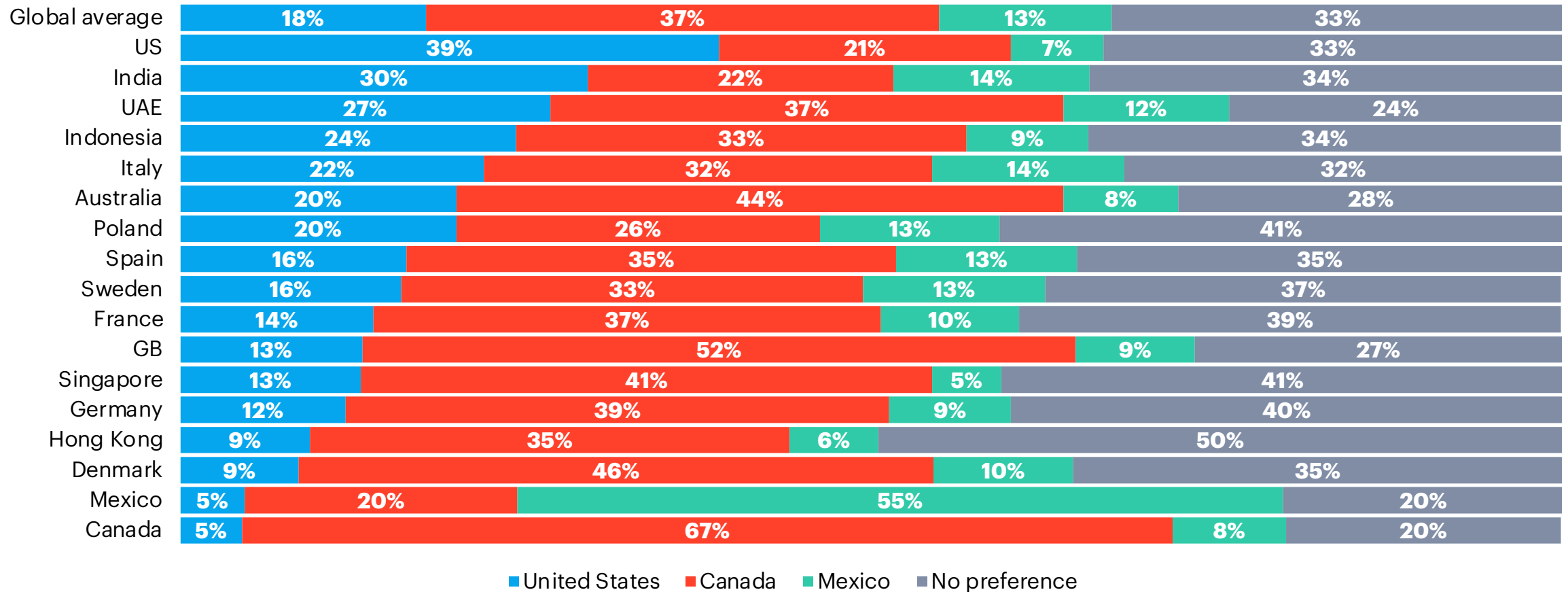
How often, if ever, do you travel more than 2 hours to attend a sporting event as a spectator?
(% of nat rep)



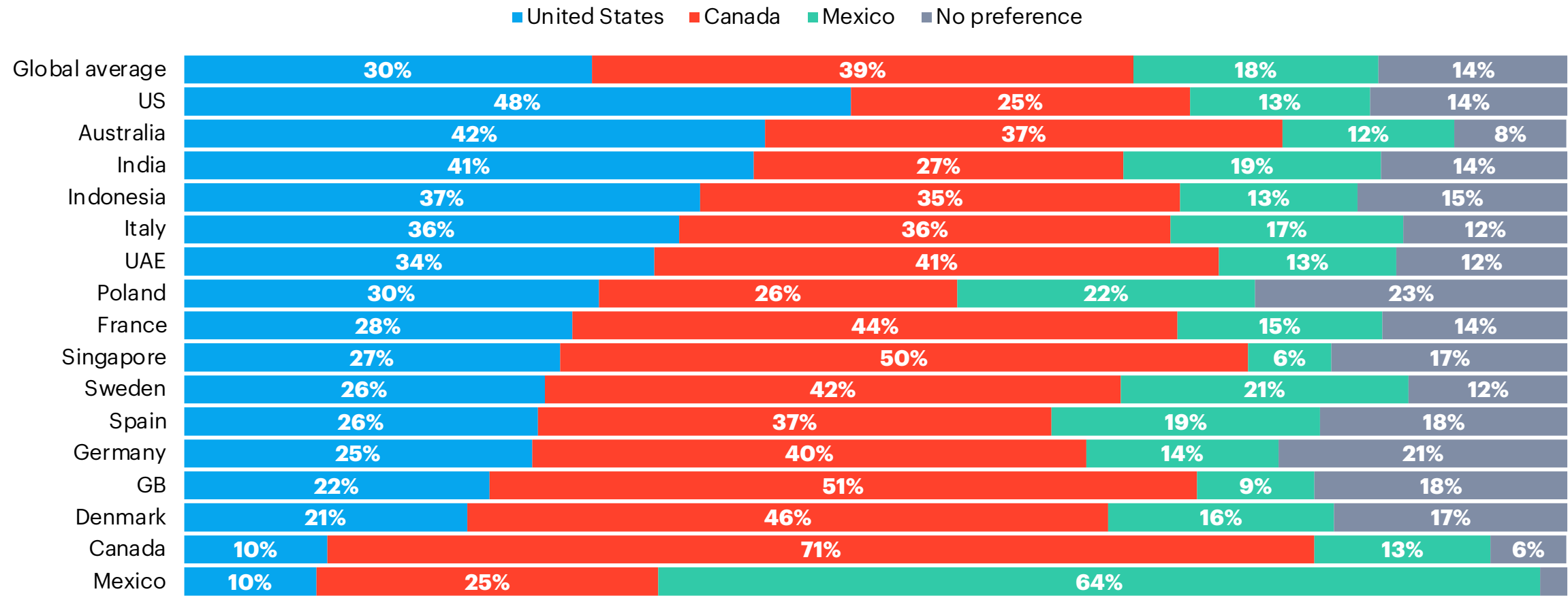
YouGov Surveys: June 13 - July 7, 2025. Re-weighted after removing "Don't know" responses. Each market: n> 450.
Nat rep from each market (IN & MX: Urban representative; ID & HK: Online representative).
Global average = unweighted average of 17 markets.

[Request FIFA World Cup data](#)

The 2026 FIFA World Cup will be hosted by three nations: Canada, Mexico, and the United States. If you were to attend a 2026 World Cup match, which host country would you most prefer to visit?
(% of nat rep)



The 2026 FIFA World Cup will be hosted by three nations: Canada, Mexico, and the United States. If you were to attend a 2026 World Cup match, which host country would you most prefer to visit?
(% of annual sports travelers)



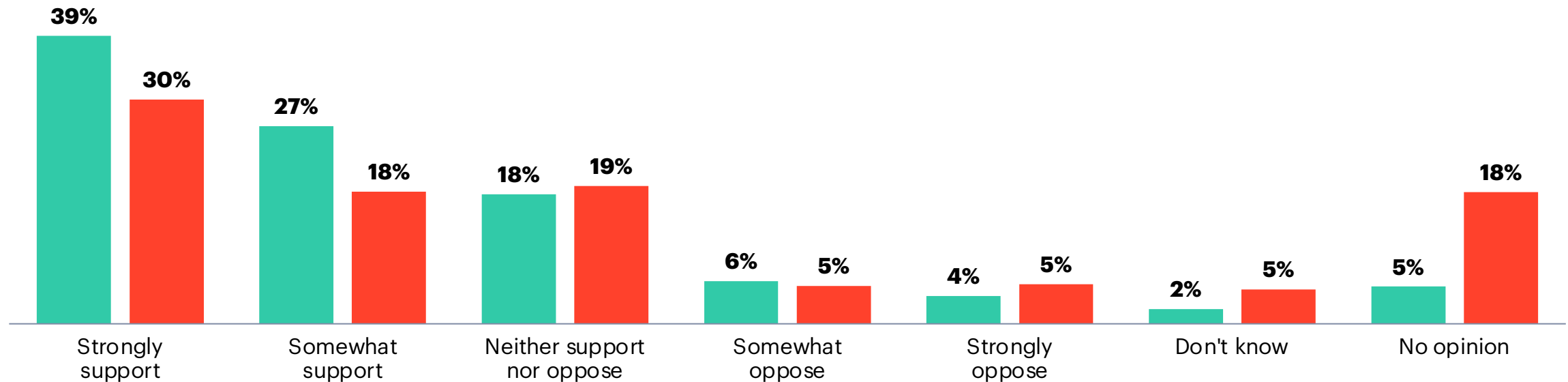
YouGov Surveys: June 13 - July 7, 2025. Annual sports travelers in each market: n> 100. Hong Kong not displayed due to sample of 99. Global average = unweighted average of 17 markets.

[Request FIFA World Cup data](#)

66% of global sports travelers support their country's team playing in World Cup, 10% oppose

Do you support or oppose your national team participating in all matches of the 2026 FIFA World Cup, including those held in the US?

■ Yearly sports travelers - Global average ■ Global average

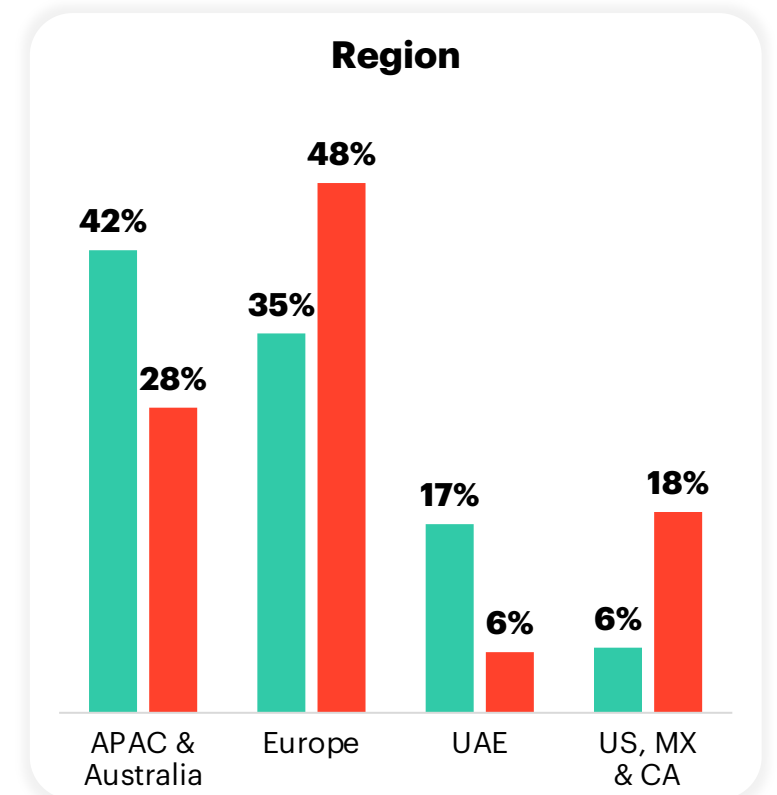
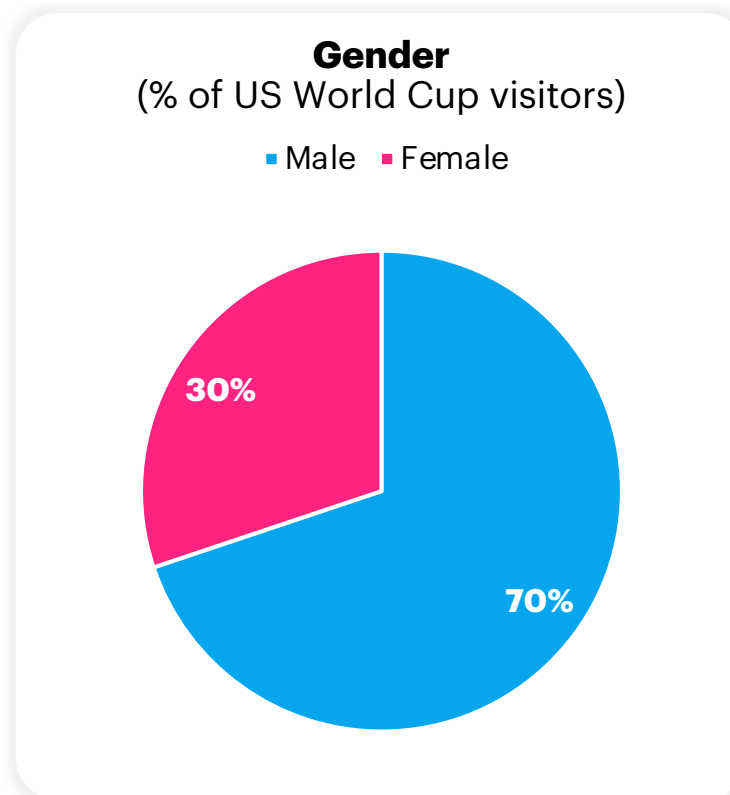
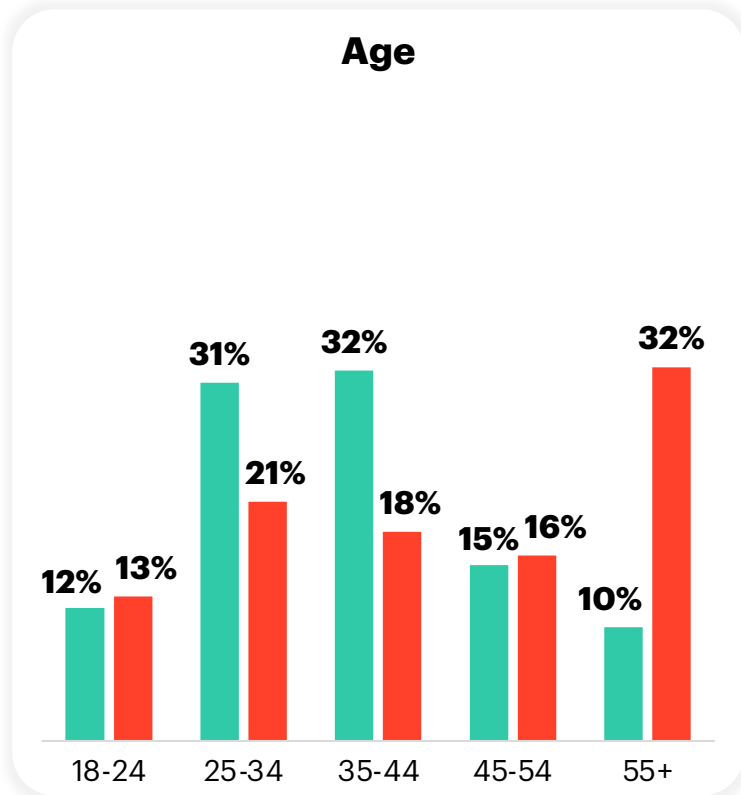


YouGov Surveys: June 13 - July 7, 2025. Re-weighted after removing "I don't follow FIFA at all" responses.
Global average of 18 markets: n> 13,000. Annual sports travelers: n> 3,600.

[Request FIFA World Cup data](#)

US World Cup visitors more likely to be 25-44, male, from APAC and UAE

■ US World Cup visitors ■ Global average



YouGov Surveys: June 13 - July 7, 2025. US World Cup visitors: Prefer US or have no preference for World Cup host, travel for sport annually, have a passport, and usually watch games. US World cup travelers: n> 950; Global average: n> 110,000

Thank you

/Research Reality

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