



CONTEXT IS EVERYTHING

US PULSE SURVEY WAVE 2

Prepared for: Destination Ontario

April 4th, 2025

Alex Mazanik, CAIP

amazonik@crg.ca
(416) 820-7026

William Schatten, CAIP

wshatten@crg.ca
(416) 388-9455

50 Carroll Street, Toronto, Ontario

www.crg.ca



CONTEXT IS EVERYTHING

CONTENTS

KEY OBJECTIVES	3
METHODOLOGY	4-6
EXECUTIVE SUMMARY	7-9
KEY DRIVER ANALYSIS	10-17
PERCEPTIONS OF ONTARIO AND CANADA	18-23
FEELING OF WELCOMING	24-29
TRAVEL PREFERENCES	30-32
AWARENESS	33-36
IMPACT ON TRAVEL PLANS	37-42
DEMOGRAPHICS	43-53



KEY OBJECTIVES

Niagara Falls (RTO2)

Overview:

CRG worked collaboratively with Destination Ontario to undertake a pulse study among US High Value Guests (HVGs) from Fly and Drive markets. The goal of the study was to evaluate perceptions of and attitudes towards Canada and Ontario among leisure travellers in the current economic and political environment.

Objectives:

The objectives of this survey are to evaluate:

- Impact of recent domestic and international political events on perceptions of Canada and Ontario as travel destinations
- Shifts on the established destination and brand perception metrics that DO tracks in the US market
- Barriers and opportunities with the current political and economic environment
- Impact on travel plans to Canada and Ontario

METHODOLOGY

 Niagara Falls (RTO2)

Methodology:

- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:

- US resident from the Drive (Michigan, Ohio, Upstate NY) and Fly (NYC, Chicago) markets
- 25 to 64 years old
- Have taken a leisure trip in the past 2 years or planning to take a leisure trip in the next 2 years
- Uses social media at least once a week

Sample Size:

	Wave 1	Wave 2
Total	1,610	1,614
US Drive	808	809
US Fly	802	806

Margin of Error:

- $\pm 2.4\%$

Weighting:

The results were weighted by age, gender and region to ensure that the sample's composition reflects that of the US population.

Fieldwork Date:

- Wave 1: January 27th – January 31st, 2025
- Wave 2: March 19th – March 25th, 2025

Average Length of Interview:

- 10.4 minutes

CONTEXTUAL TIMELINE

Niagara Falls (RTO2)

January 27 – 31, 2025

Pulse Study Fieldwork: Wave 1



March 19 – 25, 2025

Pulse Study Fieldwork: Wave 2



Ongoing Trade Tensions



January 20, 2025

Donald Trump is inaugurated
as the 47th president of the
United States.

February 1, 2025

Announcement of U.S. tariffs
and Canadian retaliatory tariffs.
Start of trade tensions.

April 2, 2025

Liberation Day



METHODOLOGY

📍 Niagara Falls (RTO2)

Rounding:

Due to rounding, the numbers may not add up to the totals. For example, the sum of all values may add up to 99% or 101%.

Significance Testing:

- Statistically significant differences (at the 95% confidence level) are stated throughout the report where possible.
- Proportions are compared using two-tailed non-parametric tests, and averages are compared using two-tailed t-tests.

Wave Comparisons:

- Differences between waves are indicated in parentheses. E.g, (+3), (-5)
- Statistically significant differences are denoted with an asterisk *.

EXECUTIVE SUMMARY



📍 Southampton (RT07)

Perceptions of Ontario Remain Steady Amid Ongoing Political Discourse

Two months after the first wave and the start of the ongoing trade tension between US and Canada, perceptions of Ontario as a destination and brand continue to hold steady across both the US Drive and US Fly markets. Despite continued awareness of recent US political developments, there has been no measurable shift in key perception metrics. Ontario's image remains resilient, suggesting that travellers are distinguishing political headlines from their travel intentions and impressions of the province. *(Slides 20-23)*

Expectations Around Canada's Welcoming Nature Have Shifted

While Ontario and Canada continue to be viewed as safe and accessible destinations, American travellers are increasingly uncertain about how welcome they would feel during a visit. Compared to Wave 1, there has been a notable decline in perceptions of Canada as a welcoming destination. This is driven not by changes in actual visitor experiences, but by rising political tensions and fears of potential anti-American sentiment. These evolving expectations highlight the need to reinforce messaging that affirms Canada's reputation for openness, warmth, and hospitality. *(Slides 25-28)*

Travel Intentions Hold Steady

Despite growing concerns among some American travellers about how welcome they might feel in Canada, largely influenced by political tensions, **overall travel plans remain unchanged**. The likelihood of visiting Ontario in the next 12 months is consistent with Wave 1 findings, with no significant drop in intent to travel. *(Slides 19, 31, 32)*

Even though there are increasing concerns about being unwelcomed, many still intend to make the trip. These results suggest that Ontario's core strengths—its natural beauty, safety, accessibility, and overall appeal—continue to outweigh any political concerns. Thus, reinforcing its position as a trusted and attractive travel destination.

The Key Driver Analysis further showed that for the US Drive market, political beliefs have little impact on travel decisions. Instead, convenience, such as easy border crossings, along with excellent customer service and cost considerations, are the key drivers. For the US Fly market, political alignment plays a more significant role, likely influenced by factors such as higher income, urban residency, and greater political engagement. However, economic factors, including the perceived value and affordability of travel to Ontario, were also strong drivers of travel intent in this market, highlighting that political considerations are not the sole factor influencing travel decisions.

Shifts in Potential Barriers

Concerns about US-Canada political tensions and potential anti-American sentiment have become more prominent across both the US Fly and Drive markets. In the previous wave, “anti-American sentiments” was previously a secondary barrier but is now the most frequently cited potential deterrent to visiting Ontario. While Ontario continues to be seen as safe and accessible, growing uncertainty around how welcome American travellers expect to feel is shaping perceptions. Cost remains a significant barrier, ranking as the second-most cited deterrent, reaffirming the importance of value considerations. These findings highlight the need to reinforce Ontario’s reputation for warmth and hospitality while continuing to demonstrate value. *(Slides 28, 29)*

Opportunities for Messaging

For the US Drive market, Ontario should emphasize its **ease of travel**, with straightforward entry requirements and **excellent customer service**—both of which are key drivers for visitation. Marketing efforts should address and dispel concerns about border hassles, reinforcing that crossing into Ontario is hassle-free. Messaging should position Ontario as an easy and accessible getaway destination, perfect for weekend trips, family outings, and spontaneous visits, while also highlighting the province’s reputation for excellent customer service, further enhancing its appeal as a seamless option for US Drive travellers.

For the US Fly market, Ontario should highlight its **welcoming and inclusive atmosphere**, positioning the province as a safe and politically neutral destination. Promoting Ontario as a destination where Americans will be welcomed can help reassure and attract this market. By focusing on Ontario’s warm, welcoming environment, the province can strengthen its appeal to US Fly travellers.


And for both US Drive and Fly markets, emphasizing **value** is key to attracting travellers to Ontario. Both segments are highly sensitive to the value they receive for their investment, whether it’s through excellent customer service, diverse attractions, or cost-effective travel options. Highlighting Ontario’s favourable exchange rate can further enhance its appeal, making the destination more affordable for travellers looking to maximize their experiences without overspending. By positioning Ontario as a destination that delivers high-quality experiences at a great value, both markets will be reassured that their investment will offer a rewarding and memorable trip. This **value-driven messaging** will strengthen Ontario’s position as an attractive option for budget-conscious and experience-seeking travellers alike.

KEY DRIVER ANALYSIS



📍 Brockville (RT09)

KEY DRIVER ANALYSIS

 Niagara Falls (RTO2)

To understand what influences travel to Canada, we conducted a Key Driver Analysis (KDA) mapping how different travel KPIs impact a traveller's likelihood to visit against their stated perception of those KPIs. KDA isolates the true impact of each KPI by controlling for all variables simultaneously, ensuring that the effect of each KPI is measured independently, without interference from other related KPIs.

This helps identify strengths to leverage, opportunities for improvement, and factors to maintain and monitor.

The vertical axis is the **perception** rating. It represents how well each KPI is rated by participants (TOP2). A higher perception score means they are more likely to agree with how that aspect of Ontario is described.

The horizontal axis is the **impact**. This is based on a regression analysis that determines how strongly each KPI influences their decision to visit Ontario. A higher impact score means it plays a stronger role in their decision making.

As a result of the analysis, the KPIs are divided into four areas:

Leverage – Areas that have higher impact and higher perception. Maintain and promote these strengths to reinforce Ontario's appeal.

Opportunities – Areas that have higher impact and lower perception. Address these areas to increase visitation.

Maintain – Areas that have lower impact and higher perception. Continue support in these areas for general promotion.

Monitor – Areas that have lower impact and lower perception. Keep an eye on shifts in importance, but no immediate action needed.

Key Driver Analysis

We conducted a Key Driver Analysis to assess the impact of 12 potential factors on the likelihood of US residents travelling to Ontario. These factors included both general perceptions of Ontario as a travel destination and political considerations that could influence travel intent.

US Drive

Among US Drive market travellers, **“delivers good vacation service or customer service”** emerged as the top driver, reflecting the importance of a smooth, enjoyable travel experience. Given that US Drive travellers are typically looking for convenience, comfort, and personal interaction, high-quality service reassures them and makes Ontario a preferred choice. This factor is high-performing, placing it in the Leverage area, and should continue to be a focal point to maintain its strong appeal. It also points to the relationship between value and hospitality—especially important in the current climate—where travellers are seeking destinations that not only feel affordable, but also genuinely welcoming and easy to navigate.

In the Opportunities area, **“has a favourable exchange rate”** was still identified as a key driver. US Drive travellers are generally more budget-conscious, so a stronger dollar provides them with more purchasing power, making Ontario a more attractive choice. Emphasizing this advantage can help draw in more cost-sensitive visitors.

In addition, **“simple border and entry requirements”** was another key driver in the Opportunities area. For the US Drive market, convenience is paramount. Long waits at the border or complex entry requirements can deter potential travellers. Clear communications on how easy it is to cross into Ontario can help reduce any barriers to entry and encourage more travel.

By continuing to emphasize excellent customer service and addressing opportunities around exchange rates and border accessibility, Ontario can further enhance its appeal and increase visitation from the US Drive market.

US Fly

For the US Fly market, the likelihood of visiting Ontario is most influenced by the “**perception of value**”, “**political neutrality**”, and “**favourable exchange rates**”—all of which fall into the Opportunities area. These factors represent areas where Ontario can improve and potentially enhance its appeal to this segment.

US Fly travellers, often seeking longer or more expensive trips, are highly sensitive to the **value they get for their investment**. Ontario's perceived value for money can influence decisions, especially when competing with other destinations offering similar experiences. Emphasizing the diverse attractions, quality accommodations, and cost-effective travel options can boost its appeal for these travellers.

Given the heightened political tensions, US Fly market travellers are increasingly seeking destinations that feel **politically neutral**. Ontario's reputation as a welcoming, safe, and unbiased destination can play a crucial role in attracting visitors who are generally more selective in their travel choices. Maintaining and reinforcing Ontario's positive perception as a friendly and welcoming destination will be key to sustaining and growing visitation from this segment.

Like the US Drive market, a **favourable exchange rate** plays a key role in the US Fly market's decision-making process. A positive exchange rate increases the perceived affordability of travel to Ontario, making it a more appealing option, especially for those planning extended trips or more significant expenditures during their stay.

These factors present clear opportunities for Ontario to further attract US Fly travellers. By emphasizing its value and welcoming nature, Ontario can increase its appeal and strengthen its position as a top destination for US Fly travellers.

KEY DRIVER ANALYSIS – US DRIVE (W2)

In the US Drive market, “delivering good vacation service or customer service” and “having a favourable exchange rate” are the strongest factors influencing intent to visit Ontario.

KPI	Impact	Perception
Delivers good vacation service or customer service	17.1	80%
Has a favourable exchange rate	14.5	74%
Has good travel infrastructure (e.g., transportation)	11.0	79%
Provides good value for money	10.9	78%
Is friendly and inclusive to all visitors	8.1	81%
Has simple border and entry requirements	8.0	72%
Has political values that align with my personal beliefs	6.9	57%
Provides lots of things to do	5.3	83%
Is easy to plan a trip for	5.2	85%
Is a politically neutral destination	5.2	55%
Is a safe destination for travel	4.5	86%
Has great natural environment/landscape attractions	3.2	86%

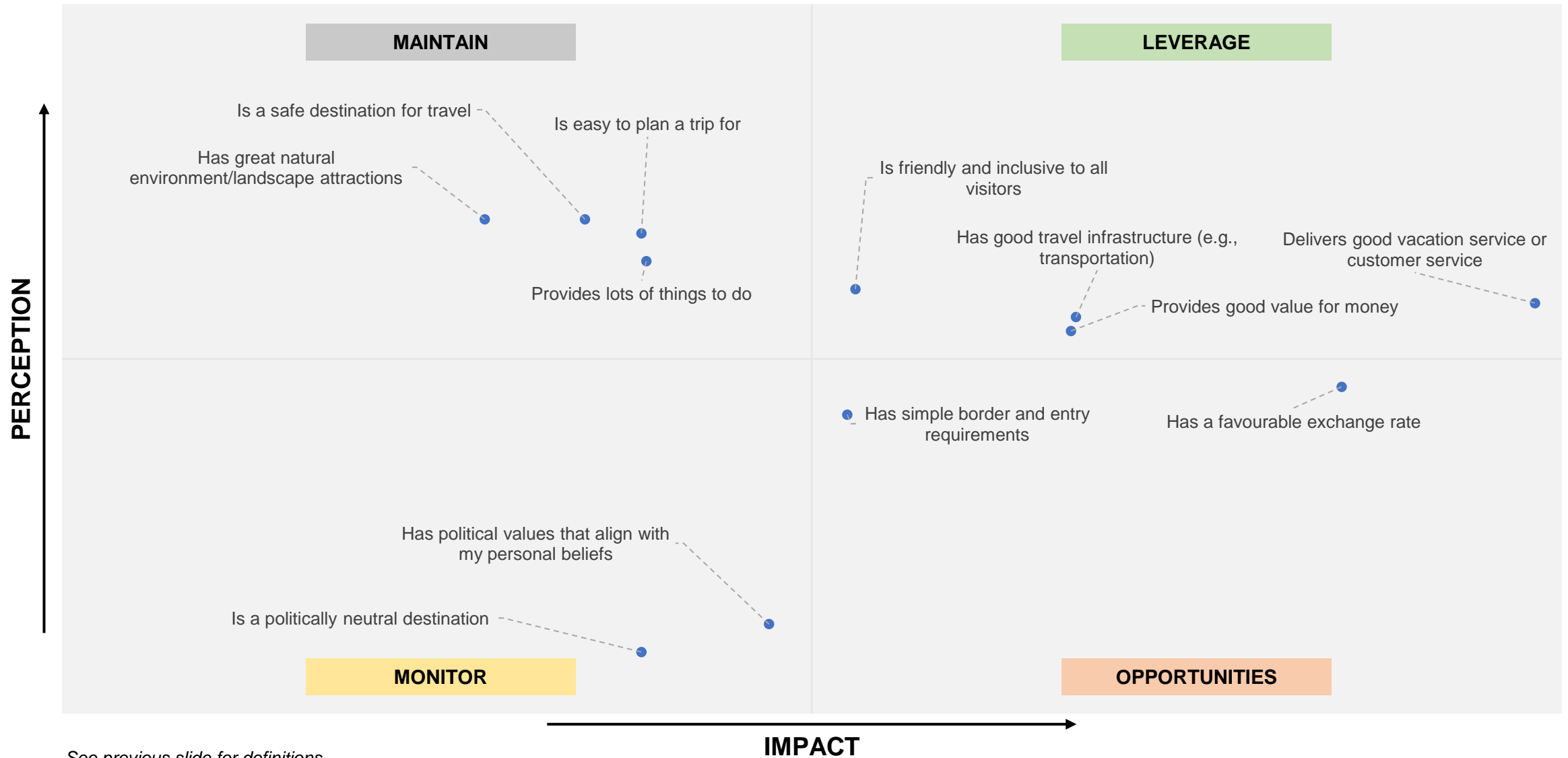
Definitions

Perception – This reflects how travellers rate each factor. A higher perception score means they are more likely to agree with how that aspect of Ontario is described. (Q: P5 series)

Impact – This score is based on regression analysis and measures how much a specific factor influences a traveller’s decision to visit Ontario. A higher impact score means it plays a stronger role in their decision to travel to Ontario. (Q: SC6, P5 series)

A detailed description of this analytical approach is available on **slide 11**.

KEY DRIVER ANALYSIS #1 – US DRIVE (W2)



See previous slide for definitions.

KEY DRIVER ANALYSIS – US FLY (W2)

In the US Fly market, “providing good value for money”, “politically neutral destination”, and “having a favourable exchange rate” are the most influential factors in the decision to visit Ontario.

KPI	Impact	Perception
Provides good value for money	19.1	84%
Is a politically neutral destination	16.4	68%
Has a favourable exchange rate	14.8	83%
Delivers good vacation service or customer service	14.7	87%
Has political values that align with my personal beliefs	6.2	73%
Provides lots of things to do	5.7	90%
Is easy to plan a trip for	5.5	91%
Has great natural environment/landscape attractions	5.0	93%
Has good travel infrastructure (e.g., transportation)	4.5	88%
Is friendly and inclusive to all visitors	3.9	91%
Is a safe destination for travel	2.6	94%
Has simple border and entry requirements	1.6	86%

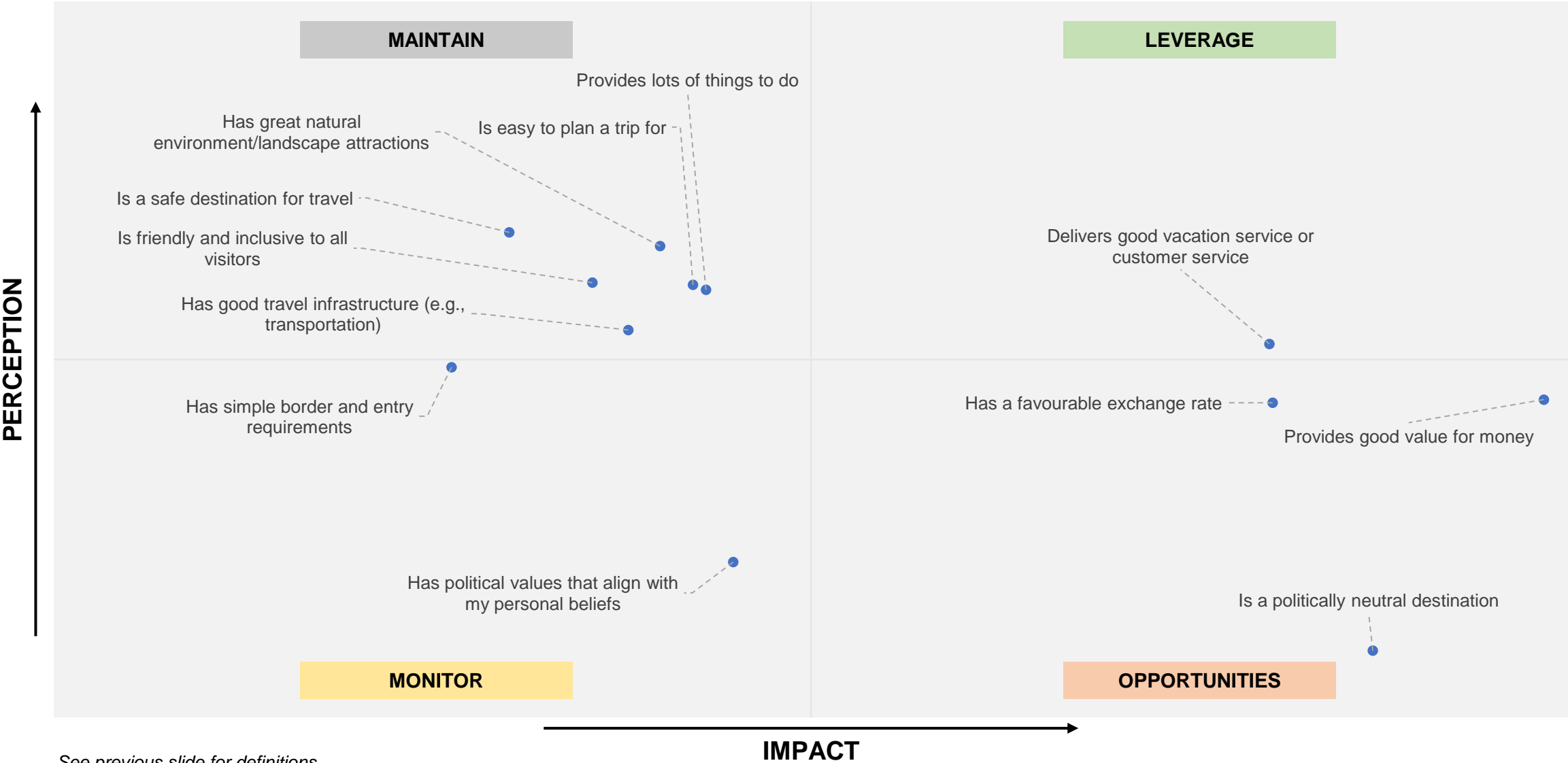
Definitions

Perception – This reflects how travellers rate each factor. A higher perception score means they are more likely to agree with how that aspect of Ontario is described. (Q: P5 series)

Impact – This score is based on regression analysis and measures how much a specific factor influences a traveller’s decision to visit Ontario. A higher impact score means it plays a stronger role in their decision to travel to Ontario. (Q: SC6, P5 series)

A detailed description of this analytical approach is available on **slide 11**.

KEY DRIVER ANALYSIS #1 – US FLY (W2)



See previous slide for definitions.



Ottawa (RTO10)

PERCEPTIONS OF ONTARIO AND CANADA

More than half of US residents are likely to take a leisure trip to Ontario in the next 12 months, with travellers in the US Fly market showing a higher level of interest compared to those in the Drive market. This consistent interest has remained steady since the previous wave, reflecting sustained appeal.

Both Canada and Ontario continue to be highly rated as top leisure travel destinations, with respondents expressing strong positive sentiments toward these destinations.

Ontario continues to be perceived as a safe and attractive travel destination, known for its diverse range of activities, stunning natural landscapes, and a welcoming, inclusive atmosphere. Additionally, US residents find it easy to plan a trip to Ontario, further enhancing its appeal as an accessible and desirable vacation spot.

Importantly, perceptions of Ontario as a pleasure travel destination and the likelihood of US residents visiting have remained largely unchanged over the past two months, signaling a stable and strong image in the minds of potential travellers.

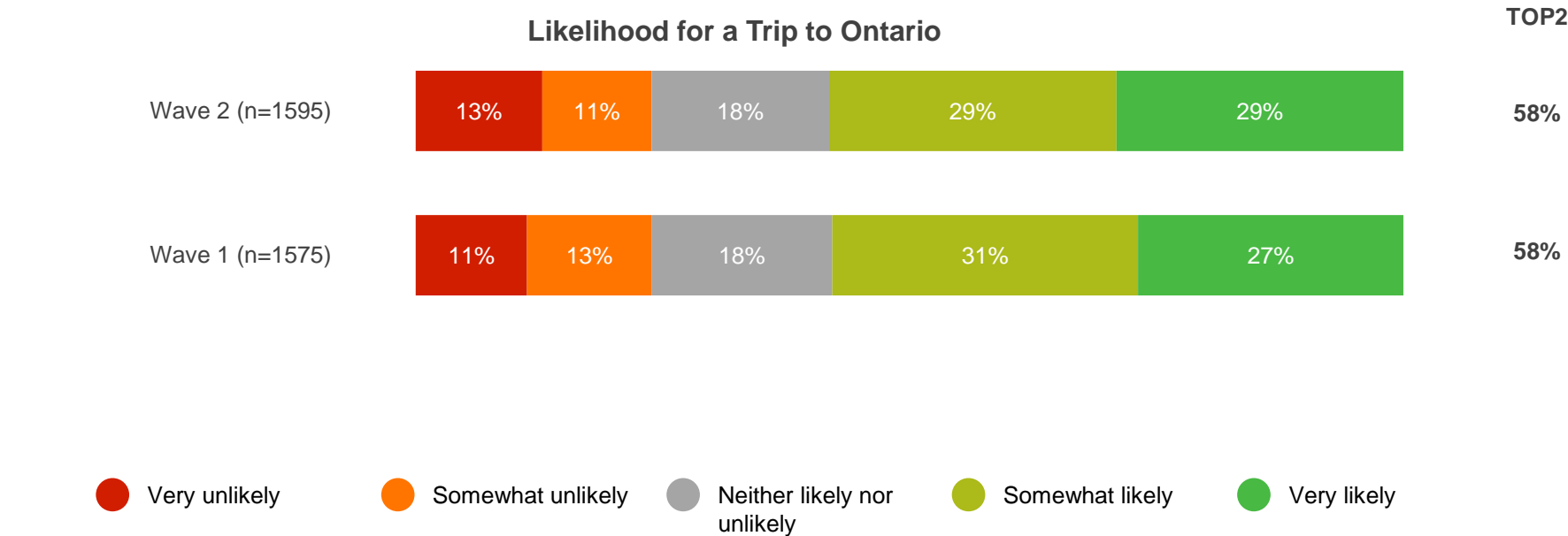
This steady interest suggests that Ontario's overall appeal as a destination is resilient to recent external factors, and its reputation for safety, natural beauty, and ease of travel continues to resonate strongly with US leisure travellers.

Around three in five US residents are likely to take an overnight trip to Ontario in the next 12 months. This figure has remained unchanged since the previous wave in January.

This suggests that recent political and economic factors have not significantly impacted Americans' interest in travelling to Ontario.

Residents from the US Fly market are significantly more likely to take an overnight trip to Ontario (63%) compared to those in the US Drive market (53%).

Those who are likely to travel overnight to Ontario tend to be younger (25-29: 67%; 30-34: 67%), male (67%) and have children under 18 (71%).



*Asterisk indicates significant difference from previous wave

SC6. In the next 12 months, how likely are you to take a pleasure trip of one or more nights away to Ontario, Canada? If you are unsure of where Ontario is, it is the province that includes destinations like Toronto, Niagara Falls and Ottawa. (Excludes “Don’t know”) All respondents. n=1595

COUNTRIES AS PLEASURE TRAVEL DESTINATIONS

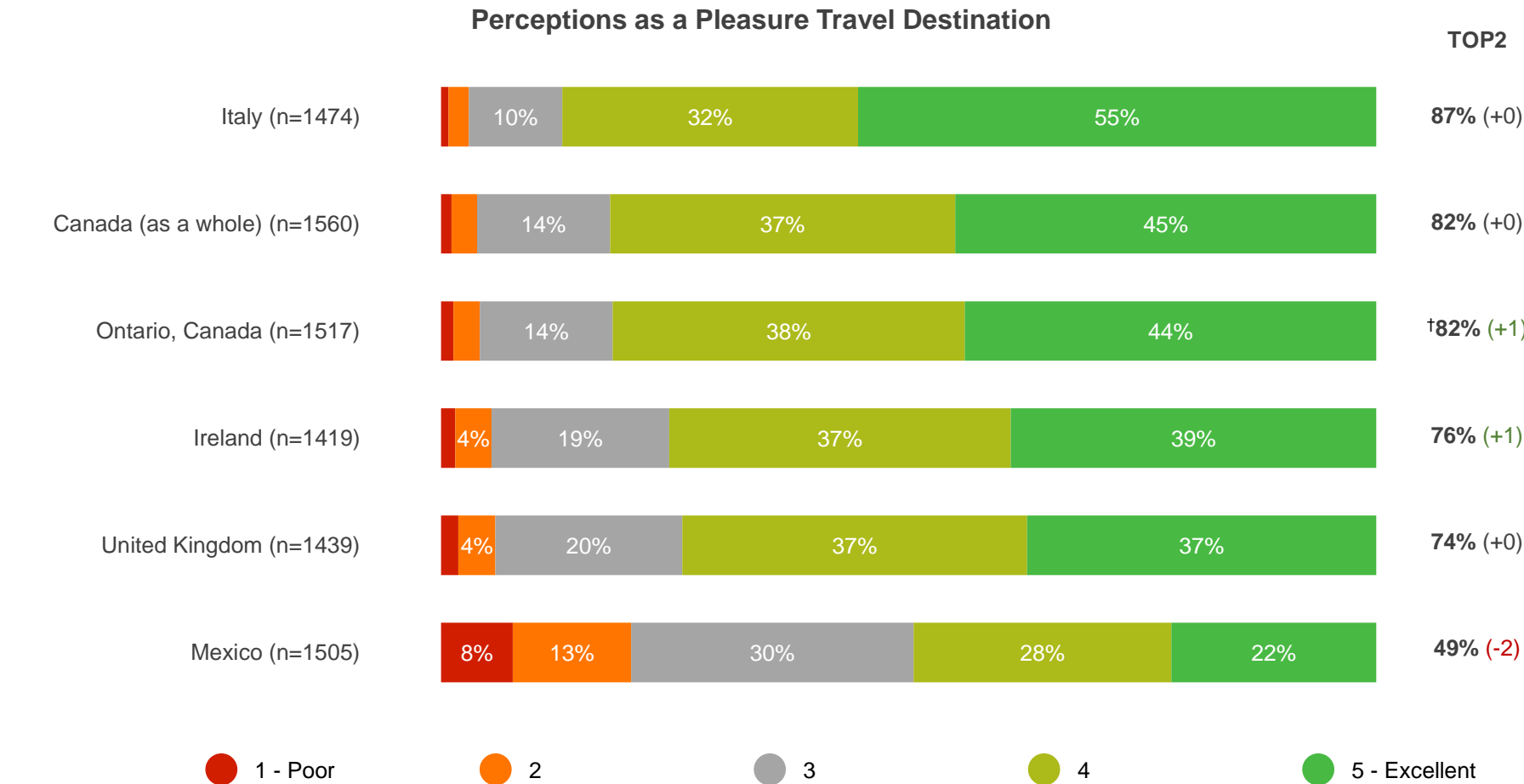
Italy and Canada continue to be rated highly as pleasure travel destinations among US residents, with more than four in five giving them top ratings.

Ontario is just as positively regarded as Canada is overall, suggesting it is well-aligned with the country’s broader travel appeal.

Similarly, these perception metrics remain steady since the previous wave. This stability in perception suggests that Ontario’s travel appeal remains strong and hasn’t been significantly influenced by any recent external factors.

Both markets perceive Ontario positively, especially in the US Fly (85%).

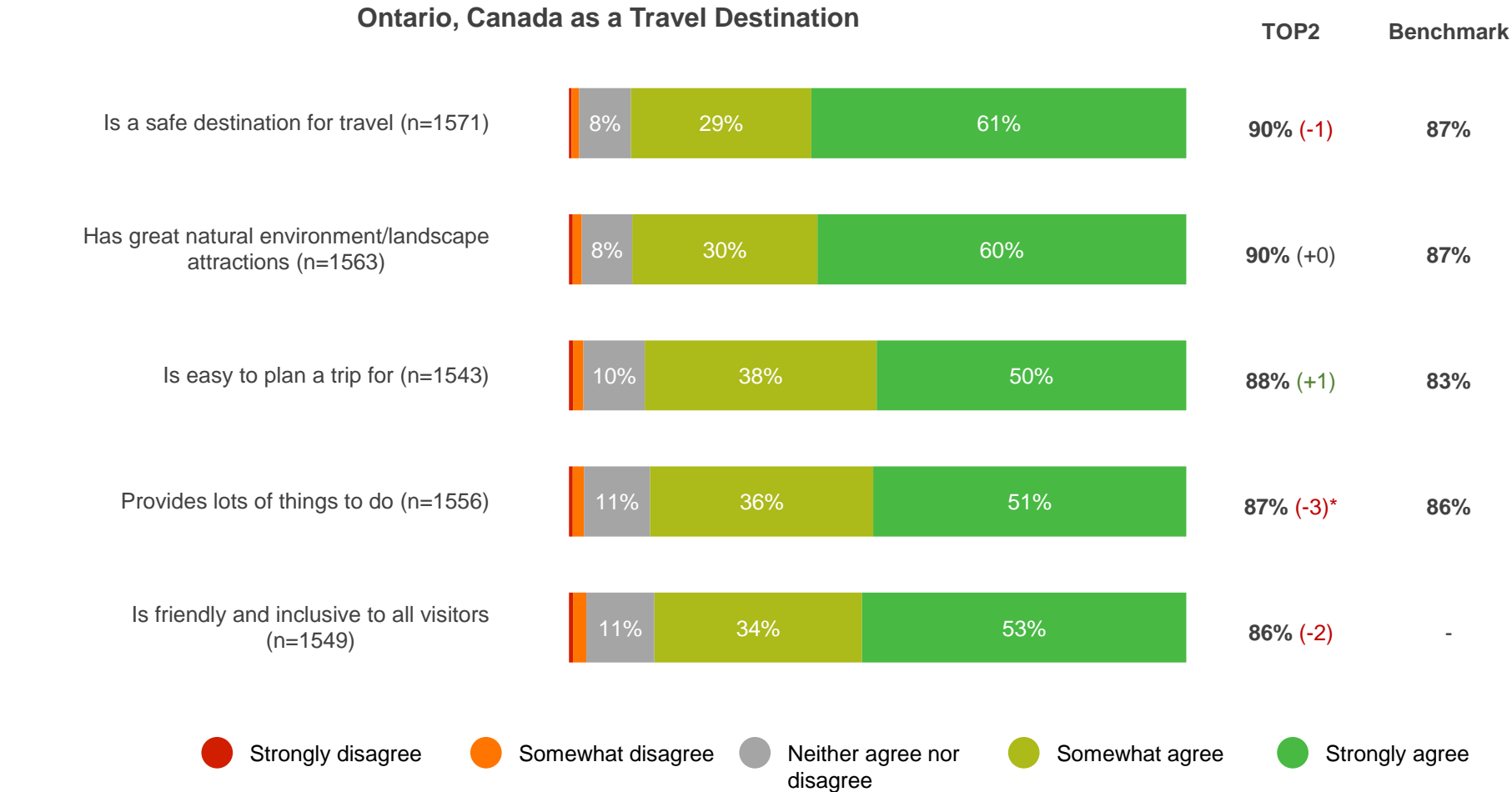
†2024 benchmark data for Ontario: 79%



**Asterisk indicates significant difference from previous wave*

The majority of respondents agree with the listed perceptions, with at least half expressing strong agreement.

These perceptions primarily remained stable since the previous wave. However, the perception that Ontario provides lots of things to do has decreased since the previous wave, particularly among the US Drive market.

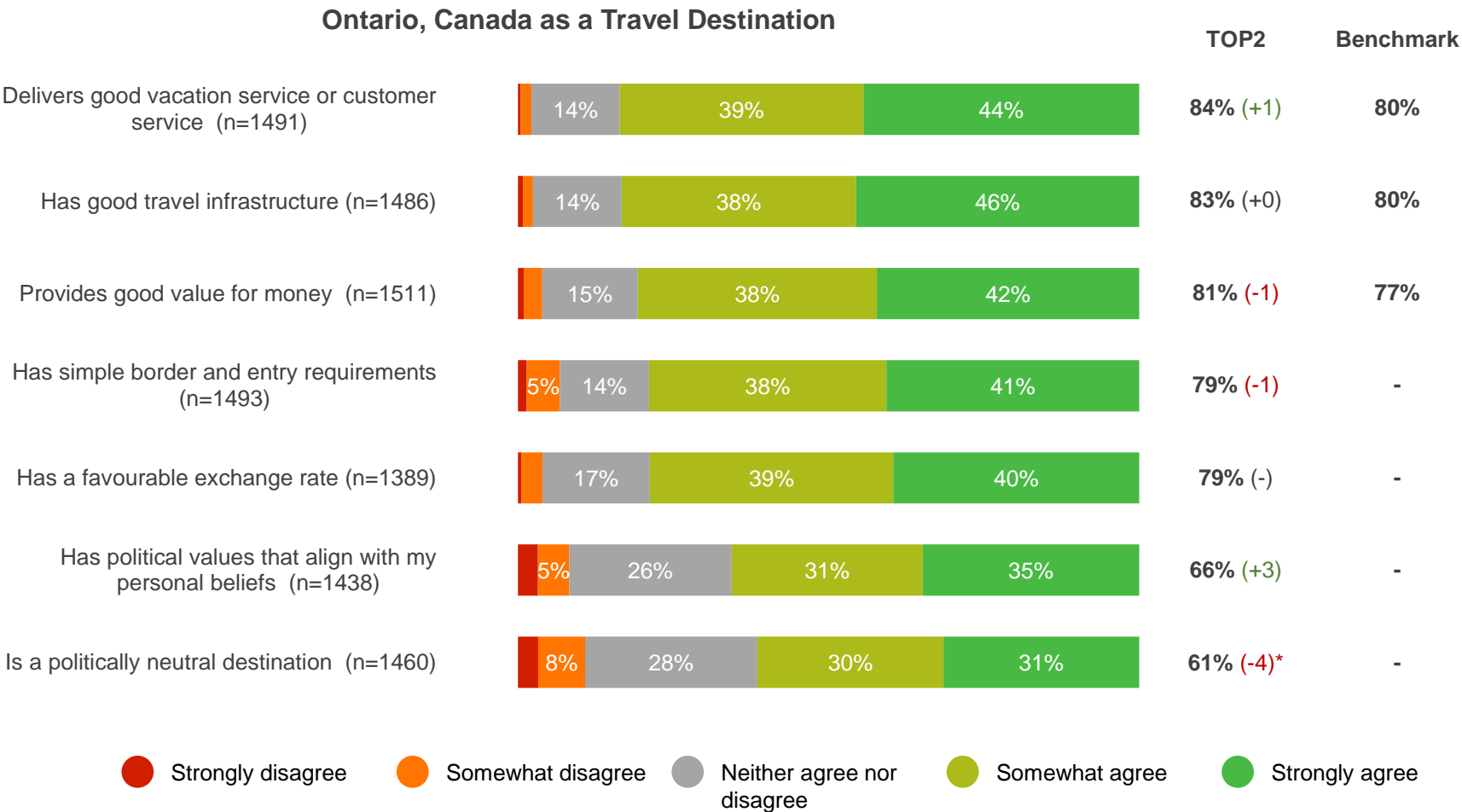


**Asterisk indicates significant difference from previous wave*

P5A. Thinking only about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...? (Labels <4% not visualized) (Excludes "Don't know")

Around two in three believe that Ontario is politically neutral, and that the political values align with their personal beliefs.

However, the perception that Ontario is a politically neutral destination has significantly decreased since the previous wave.



**Asterisk indicates significant difference from previous wave*

P5A. Thinking only about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...? (Labels <4% not visualized) (Excludes “Don’t know”)

ONTARIO AS A TRAVEL DESTINATION – CONTINUED

Perceptions of Ontario as a travel destination has remained relatively steady since the previous wave for both US Drive and Fly markets.

However, there's a decrease of perception that Ontario is politically neutral destination for both the US Drive (-3) and US Fly (-5).

	US Drive		US Fly	
	W1	W2	W1	W2
Is a safe destination for travel	87%	86%	94%	94%
Has great natural environment/landscape attractions	87%	86%	92%	93%
Is easy to plan a trip for	84%	85%	90%	91%
Provides lots of things to do	87%	83%	92%	90%
Is friendly and inclusive to all visitors	84%	81%	91%	91%
Delivers good vacation service or customer service	78%	80%	88%	87%
Has good travel infrastructure	77%	79%	90%	88%
Provides good value for money	77%	78%	86%	84%
Has simple border and entry requirements	71%	72%	88%	86%
Has a favourable exchange rate	-	74%	-	83%
Has political values that align with my personal beliefs	55%	57%	70%	73%
Is a politically neutral destination	58%	55%	73%	68%

P5A. Thinking only about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...? (Labels <4% not visualized)
(Excludes "Don't know")

FEELING OF WELCOMING

Three in four US residents view Canada as welcoming to American visitors. However, this perception has dropped significantly, falling 15 points since the previous wave, causing Canada to drop to 4th place in overall rankings.

An increased number of respondents cite political tensions between the US and Canada, as well as rising anti-American sentiment, as reasons for believing Canada will be less welcoming in the future. This shift is particularly evident among US Drive market travellers, where the perception has worsened more significantly.

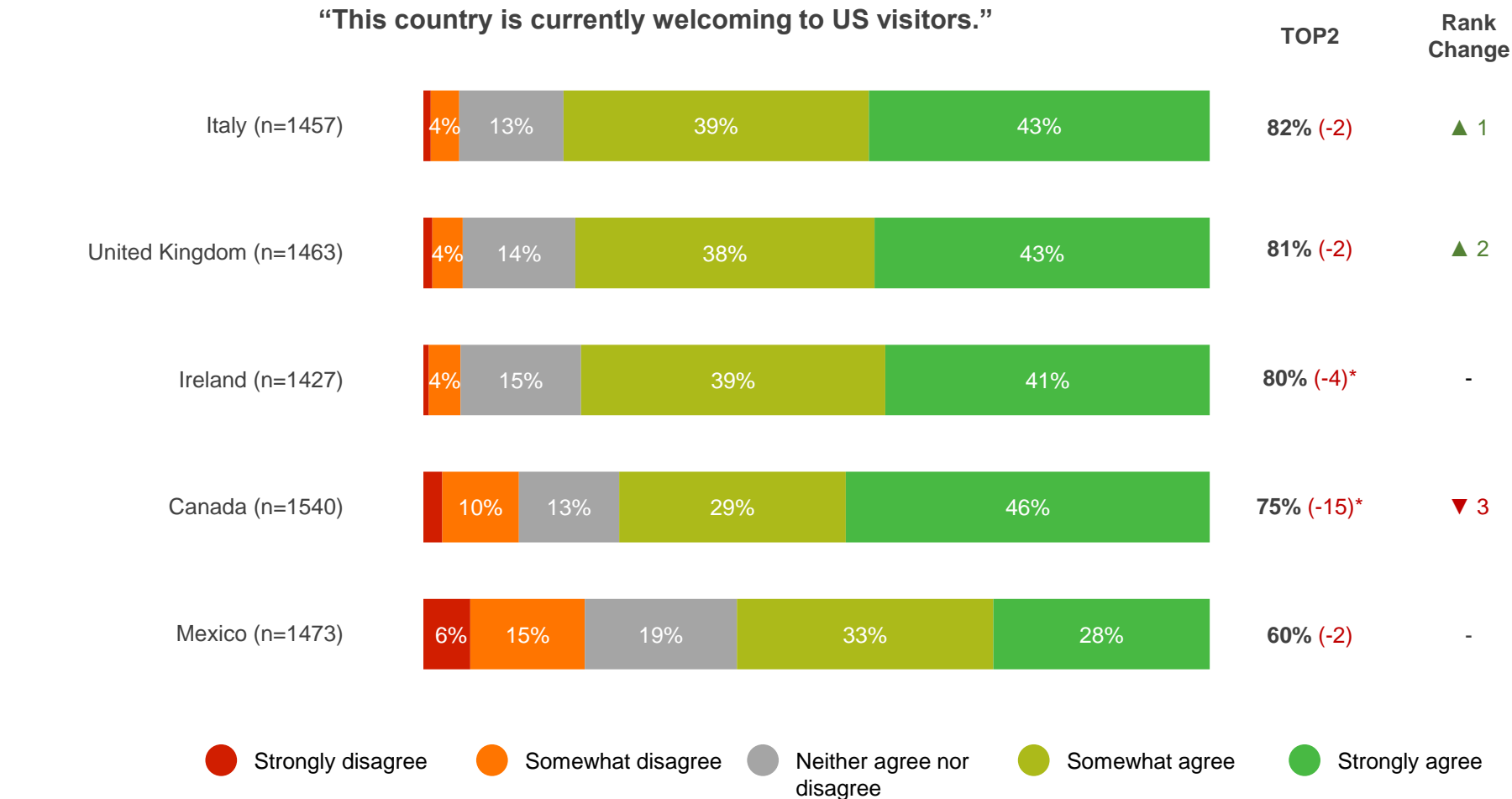
When asked about potential deterrents, Anti-American sentiment has emerged as the top potential barrier discouraging US residents from visiting Ontario, affecting both the US Drive and Fly markets.

This trend highlights a need for focused efforts to restore confidence. Reinforcing positive messages about Canadians being friendly, inclusive, and welcoming toward US visitors will be important in reversing these negative perceptions.

Three in four US residents find Canada to be welcoming to US visitors. However, this perception has dropped significantly, dropping 15 points since the previous wave and bringing Canada down to the 4th rank.

Recent strains in US-Canada relations may have influenced US residents' expectation of how welcome they would feel in Canada.

This perception of feeling unwelcomed in Canada is mainly driven by older residents (45-64) and women.



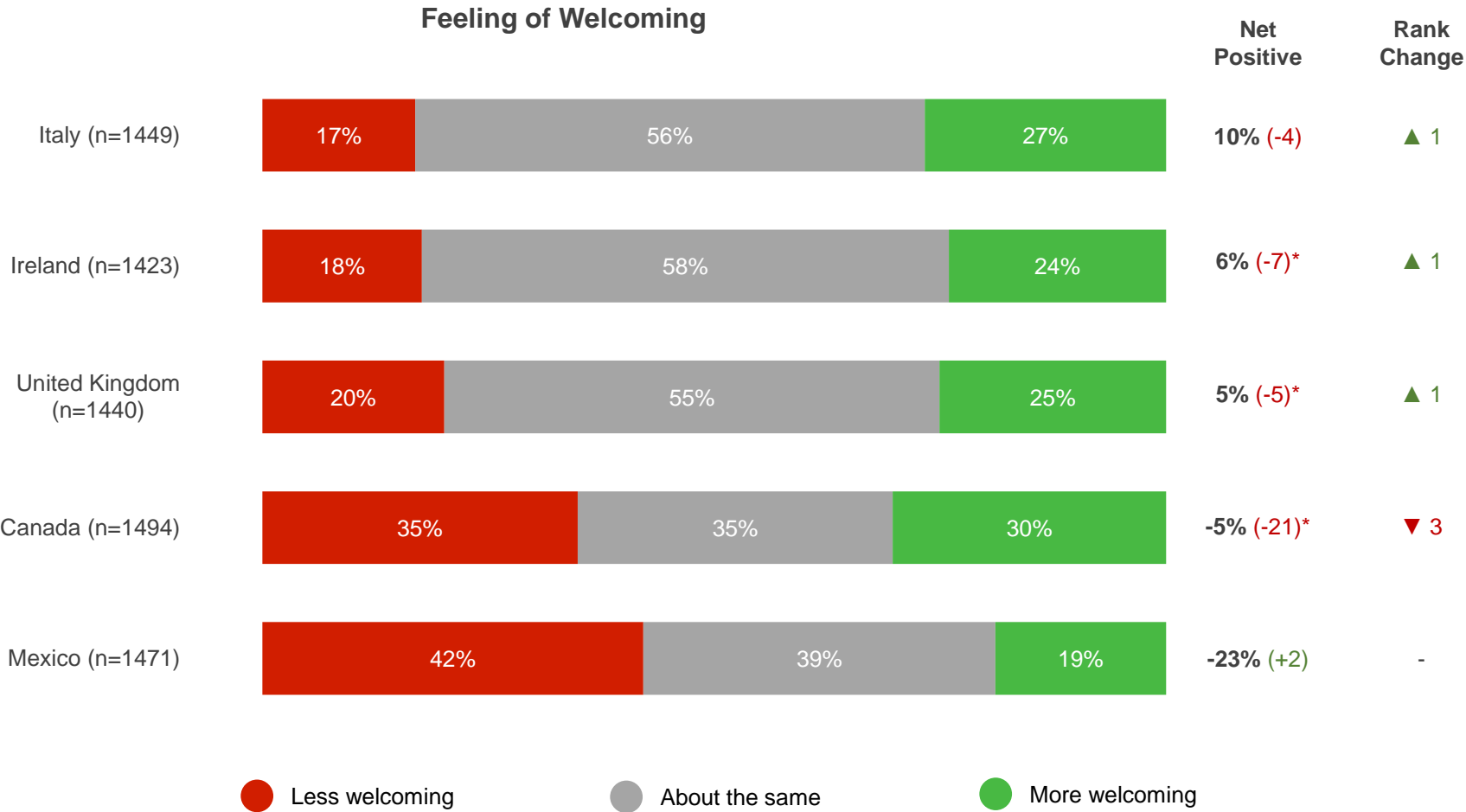
*Asterisk indicates significant difference from previous wave

W1. For each of the following countries, how much do you agree or disagree with the following statement? “This country is currently welcoming to US visitors.” (Labels <4% not visualized) (Excludes “Don’t know”)

WELCOMING TO US VISITORS

Over the next year, more US residents think that Canada will be less welcoming to US visitors. This perception has shifted negatively by 21 points since the previous wave.

This is another insight indicating that political tensions have shaped Americans' expectations of Canada's hospitality.



**Asterisk indicates significant difference from previous wave*

W1B. Thinking ahead to one year from now, do you believe the following countries will feel more welcoming, less welcoming, or about the same as they do today to US visitors? (Excludes “Don’t know”)

CANADA MORE WELCOMING TO US VISITORS

The outlook that Canada will be more welcoming to US visitors is largely driven by the perceptions that Canada is safe and secure with friendly locals.

Overall, the reasons that US residents think Canada will be more welcoming have remained stable since the previous wave.

However, the perception that Ontario is politically stable has significantly decreased since the previous wave. This decrease was mainly seen in the US Fly market.

Factors Contributing to Canada being More Welcoming		Rank Change	US Drive	US Fly
Safe and secure for travellers	60% (-4)	-	53% (-4)	66% (-3)
Friendly locals	53% (-1)	-	55% (+7)	52% (-8)
Easy border crossing	47% (-4)	-	43% (-8)	50% (-2)
Positive feedback from friends	43% (-2)	▲ 2	39% (-1)	46% (-3)
Inclusive and diverse culture	41% (-5)	▼ 1	39% (-2)	44% (-7)
Warm and helpful customer service	39% (-6)	▼ 1	38% (-6)	40% (-7)
Previous experience	37% (+0)	▲ 2	40% (+3)	35% (-2)
Positive media portrayal of Canadians	37% (-1)	-	32% (+1)	42% (-2)
Politically stable	34% (-7)*	▼ 2	29% (-5)	38% (-9)*
Their political values are similar to mine	26% (-1)	-	23% (+3)	29% (-4)
Other	<1% (-1)	-	<1% (-2)	<1% (-1)
Not sure	2% (+1)	-	3% (+2)	<1% (+0)

**Asterisk indicates significant difference from previous wave*

W2A. You mentioned that Canada will be more welcoming to US visitors in a year from now. What factors contribute most to this perception? (Multi-select) Respondents who said Canada will be More Welcoming. n=445

CANADA LESS WELCOMING TO US VISITORS

Significantly more respondents are citing political tensions between US and Canada and anti-American sentiment as reasons for thinking Canada will be less welcoming.

This increase is especially pronounced among the US Drive market.

Reinforcing positive messages about Canadians being friendly and welcoming toward US visitors will be key to restoring confidence.

Factors Contributing to Canada being Less Welcoming		Rank Change	US Drive	US Fly
Political tensions between US and Canada	91% (+7)*	-	92% (+9)*	89% (+4)
Anti-American sentiment	53% (+8)*	-	49% (+13)*	58% (+3)
Difficult border-crossing requirements	11% (-7)*	-	14% (-3)	9% (-10)*
Their political values differ from mine	9% (+0)	▲ 2	10% (+2)	9% (-1)
Negative media portrayal of Canada	8% (+1)	▲ 3	10% (+3)	7% (+1)
Unclear travel regulations	7% (-3)	▼ 1	8% (-3)	7% (-2)
Concerns about safety or security	6% (-4)*	▼ 3	8% (-8)*	4% (+0)
Reports of discrimination or bias	5% (-2)	▼ 1	7% (+0)	3% (-5)
Perception of unfriendly locals	5% (-2)	-	6% (-1)	4% (-2)
Negative stories from friends or family	2% (-4)*	-	3% (-4)	2% (-2)
Other	2% (-7)	-	2% (-10)	2% (-4)
Not sure	1% (+1)	-	1% (+1)	<1% (+0)

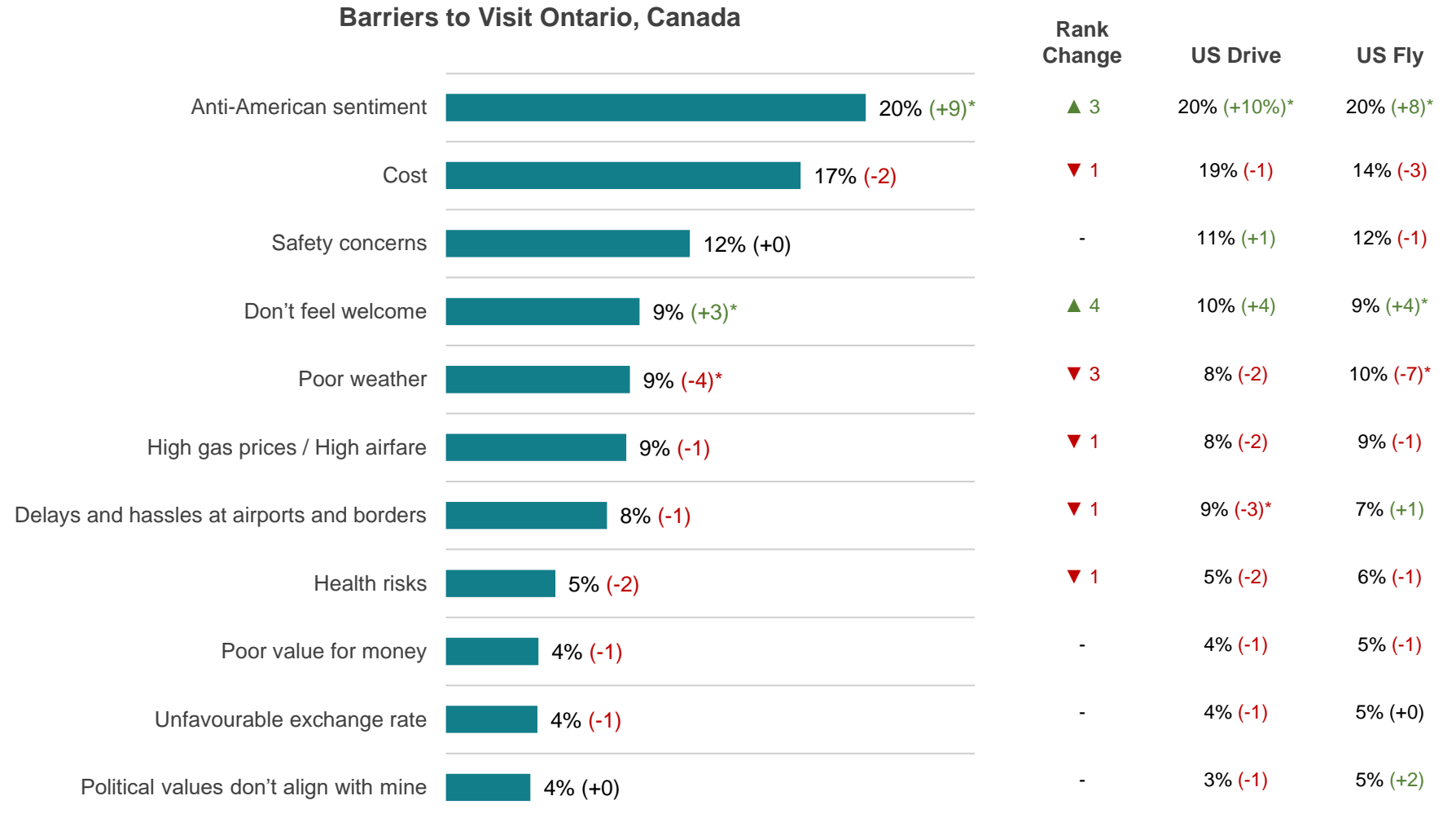
**Asterisk indicates significant difference from previous wave*

W2B. You mentioned that Canada will be less welcoming to US visitors in a year from now. What factors contribute most to this perception?
(Multi-select) Respondents who said Canada will be Less Welcoming. n=518

TOP RANKED BARRIERS TO VISIT ONTARIO, CANADA

Anti-American sentiment has emerged as the leading potential barrier discouraging US residents from visiting Ontario, affecting both the US Drive and Fly markets.

Those who are deterred by Anti-American sentiments tend to be older (45-54: 20%; 55-64: 31%), women (23%) and say that Ontario's political values do not align with their personal beliefs (29%).



**Asterisk indicates significant difference from previous wave*

B1. Which of the following factors might discourage you from visiting Ontario, Canada? (Ranking)
All Respondents. n=1614

TRAVEL PREFERENCES

For travel within the US, half anticipate no change to their current travel plans. When it comes to international travel, more than half also expect no change to their existing plans over the next 12 months.

Overall, US residents' domestic and international travel remained relatively stable.

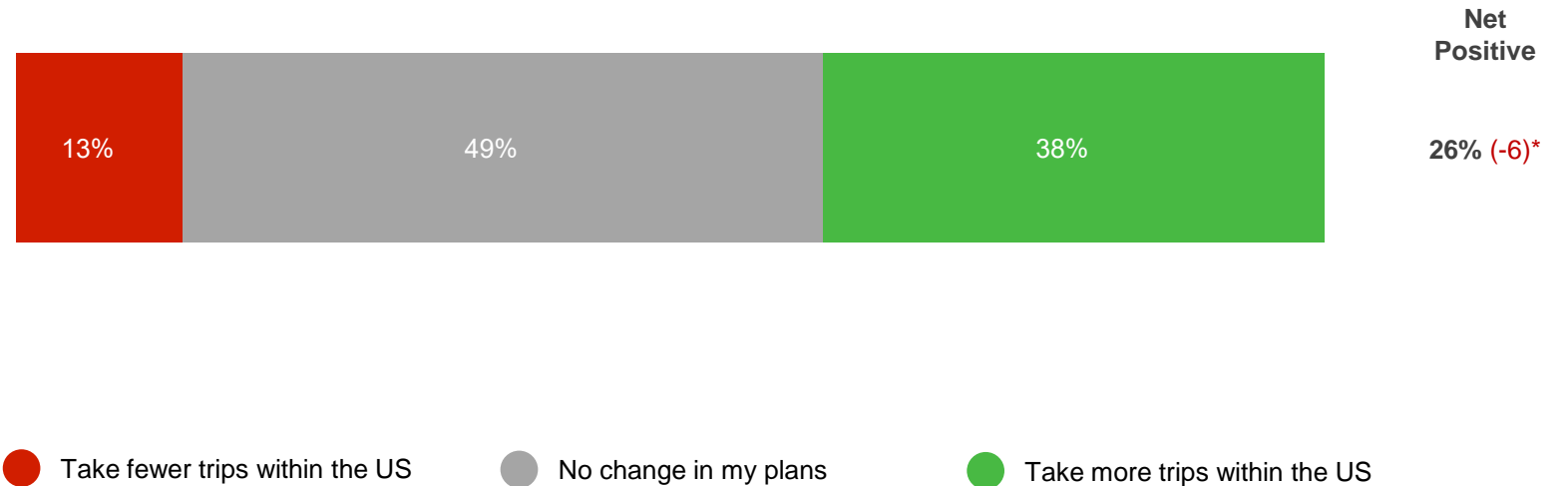
However, a slight dip in travel intent suggests that some are starting to feel the strain of rising costs and broader economic uncertainty. These financial pressures may be causing travellers to pause, adjust, or downscale their plans, even if their overall outlook remains cautiously steady.



Around half of respondents still say their domestic travel plans haven't changed.

However, a modest decline in domestic travel intent is observed, likely influenced by ongoing economic pressures such as rising costs and broader financial uncertainty. These factors may be prompting travellers to reconsider or scale back their plans.

Travel Plans Within the US for the Next 12 Months

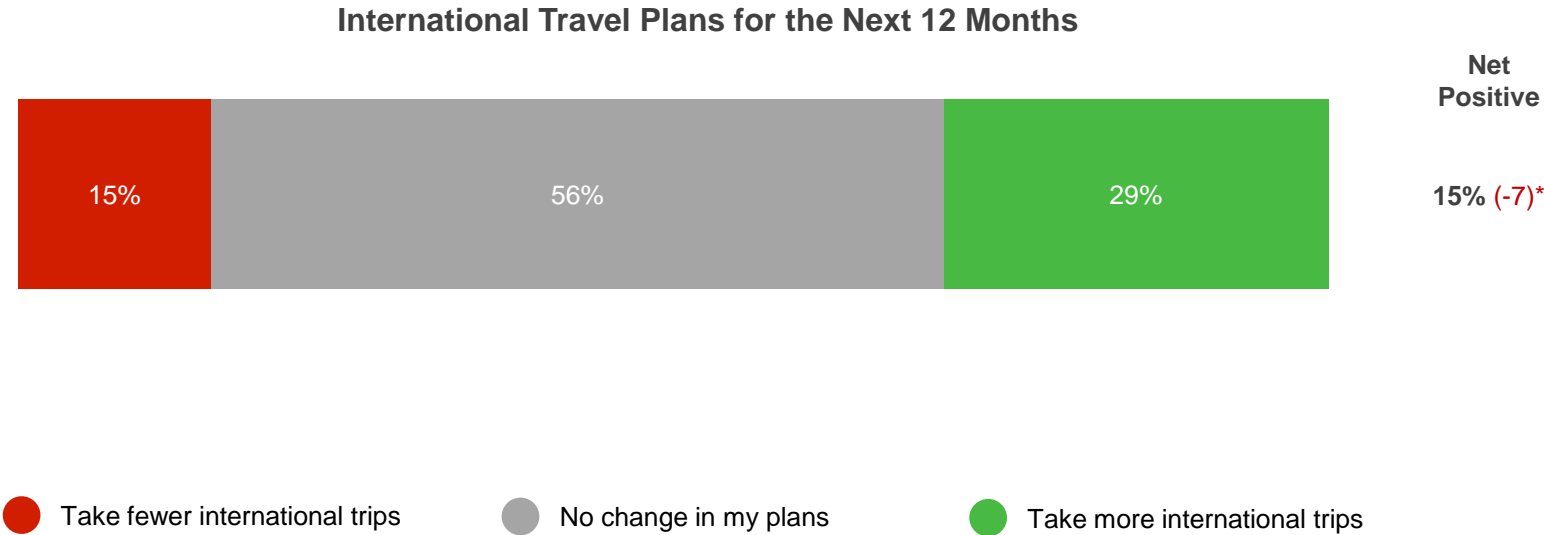


**Asterisk indicates significant difference from previous wave*

T1A. Which of the following best describes your domestic travel plans in the next 12 months?
All respondents. n=1614

More than half of respondents say their international plans have not changed.

However, there is a slight decline on travel intent, with a more noticeable decline for the US Fly market (-12) than the Drive (-4). US Fly market travellers, who typically plan longer, higher-cost trips, may be more sensitive to financial pressures and more hesitant to commit in an unpredictable climate.



**Asterisk indicates significant difference from previous wave*

T1B. Which of the following best describes your international travel plans in the next 12 months?
All respondents. n=1614



 Algonquin Park (RTO12)

AWARENESS

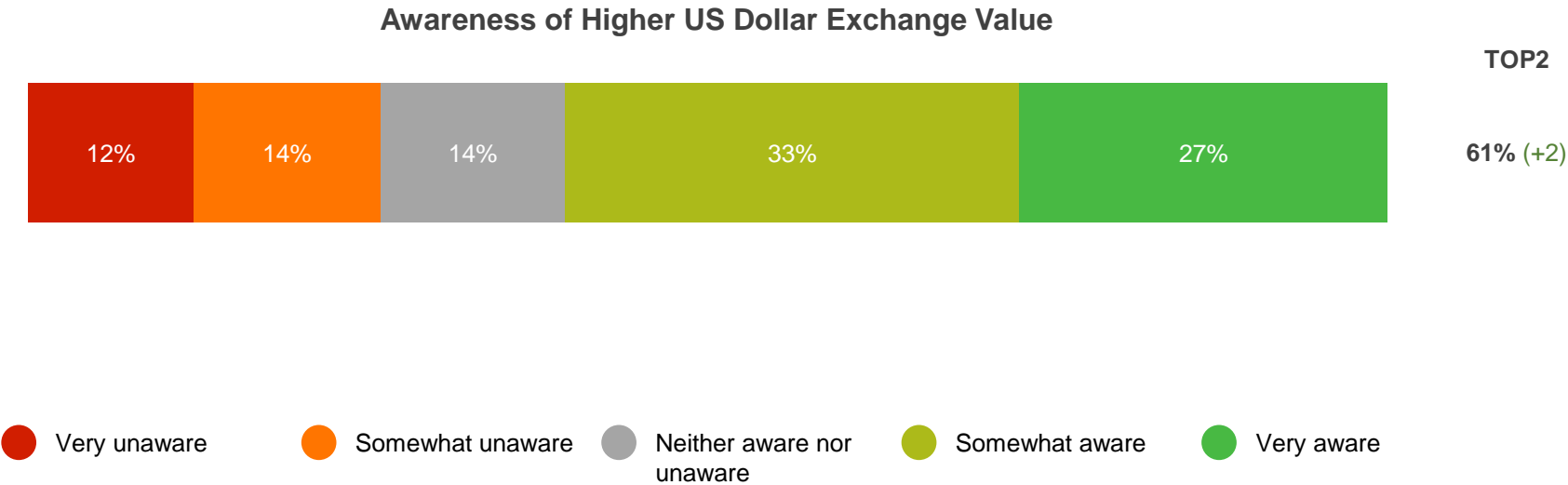
US residents are generally aware of the favourable US dollar exchange, which has remained consistent since the previous wave.

However, their attention seems to be increasingly focused on recent political developments, with significantly higher awareness of these topics compared to the previous wave.

Around four in five respondents are aware of US President Donald Trump's proposal concerning Canada's statehood and nine in ten are aware of the implementation of 25% tariffs on Canadian goods. Notably, the US Fly market demonstrates greater awareness of these political issues compared to other segments.

Three in five respondents are aware of the favourable exchange rate for travel to Canada. This metric has remained stable since the previous wave.

Those who are aware are more likely to be from the US Fly market (64%), 30-44 years old (64%), men (69%) and have children under 18 (67%).

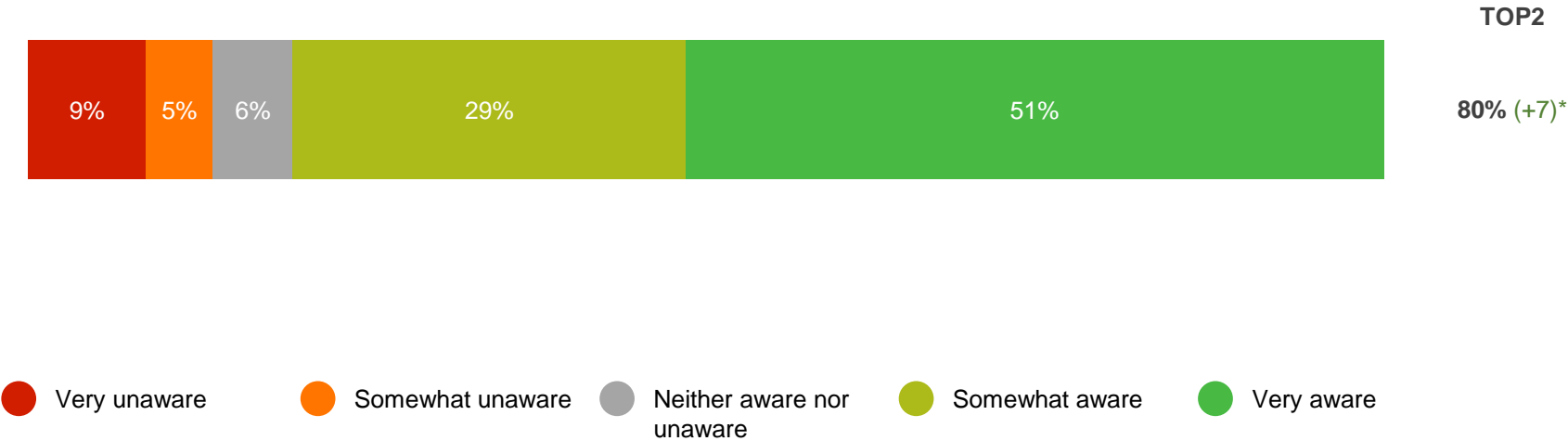


**Asterisk indicates significant difference from previous wave*

A1. How aware are you that the US dollar has a higher exchange value than the Canadian dollar (1.43, as of March 19th)? (Excludes “Don’t know”) All respondents. n=1584

Significantly more US residents are aware of President Donald Trump’s proposal for Canada becoming the 51st state, with four in five indicating this.

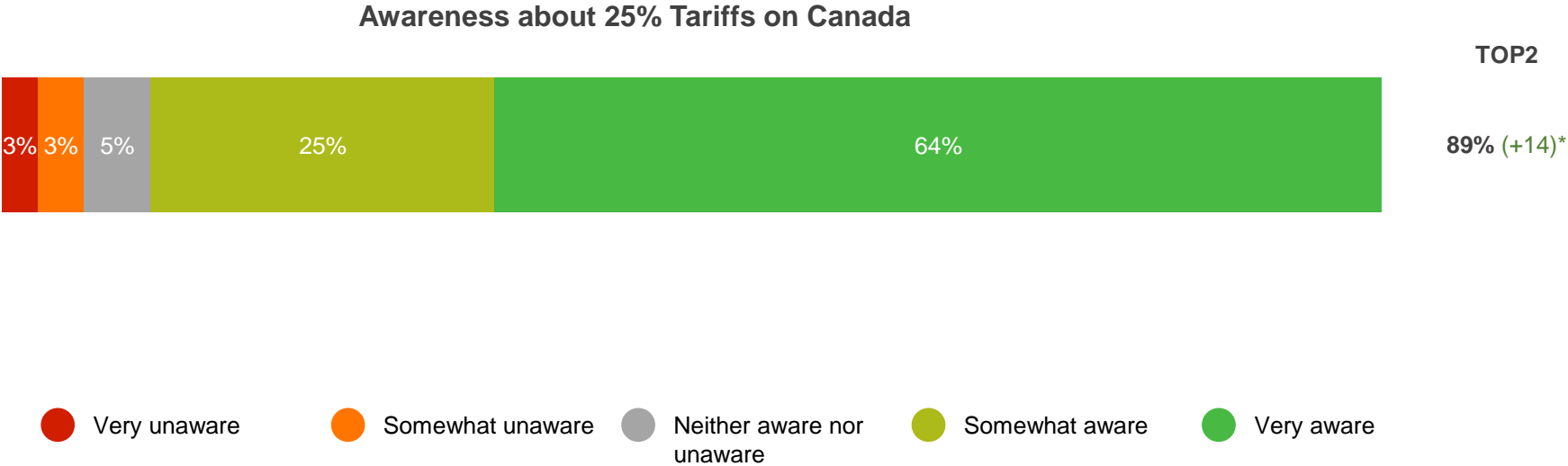
Awareness about Trump’s Proposal for Canada Becoming the 51st State



**Asterisk indicates significant difference from previous wave*

A2. How aware are you of US President Donald Trump’s proposal of Canada becoming the 51st state? (Excludes “Don’t know”)
All respondents. n=1597

Nine in ten are aware that President Donald Trump has imposed 25% tariffs on Canada. This awareness has risen by 14 points since the previous wave.



**Asterisk indicates significant difference from previous wave*

A3. How aware are you that US President Donald Trump has imposed 25% tariffs on Canada? (Excludes “Don’t know”)
All respondents. n=1607

IMPACT ON TRAVEL PLANS

Around three in five expressed concerns around border crossing and entry requirements for Canada, which has increased since the previous wave. This apprehension is particularly more pronounced among the US Drive market.

Nearly half of the respondents indicate they are more likely to travel to Ontario in the next 12 months due to the favourable exchange rate.

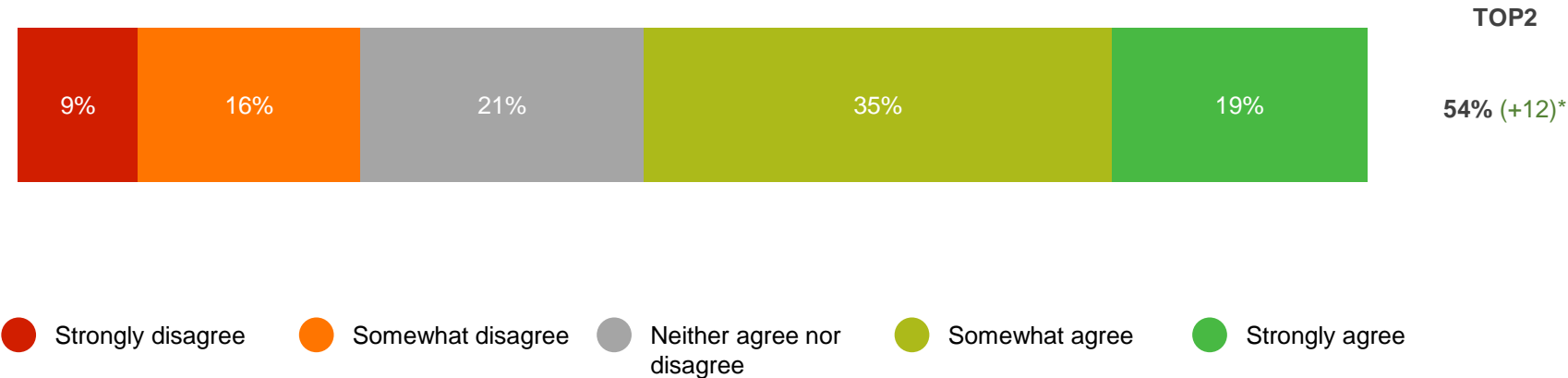
Neither the US Presidential election nor political news and commentary appear to have any significant impact on the travel plans of respondents for the upcoming 12 months.

However, outlook on the US-Canada relationship over the next 12 months is divided, with more US residents expecting the relationship to worsen than improve.



More than half of US residents are showing concern about border crossings, entry requirements, or travel restrictions to Ontario, Canada. This has significantly increased since the previous wave.

“I am concerned about border crossings, entry requirements or travel restrictions to Ontario, Canada.”

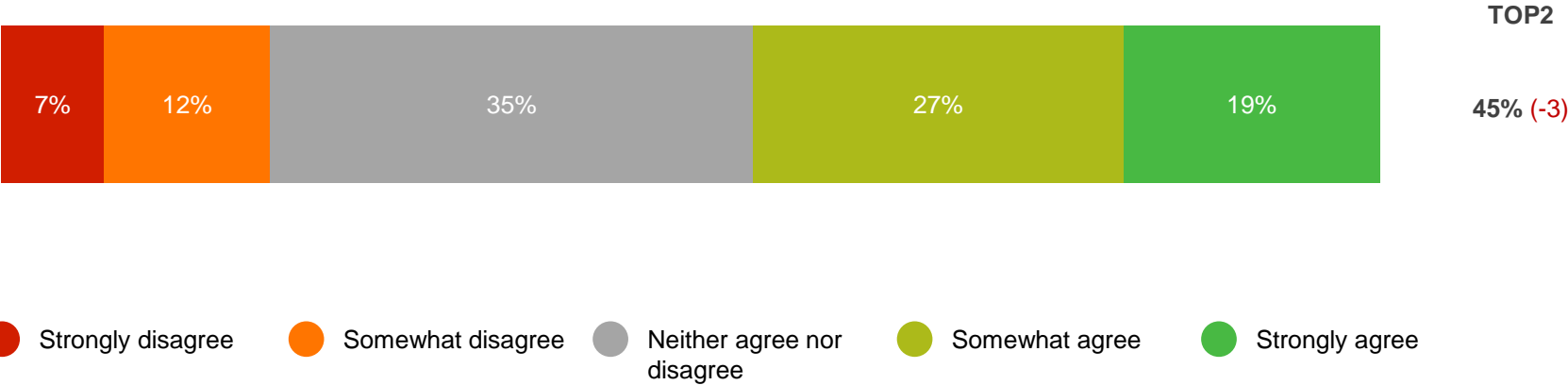


**Asterisk indicates significant difference from previous wave*

11. How much do you agree or disagree with the following statement? “I am concerned about border crossings, entry requirements or travel restrictions to Ontario, Canada.” (Excludes “Don’t know”)
All respondents. n=1606

The favourable exchange rate serves as a key driver for travel to Ontario for about half of the respondents. This figure has remained steady since the previous wave in January.

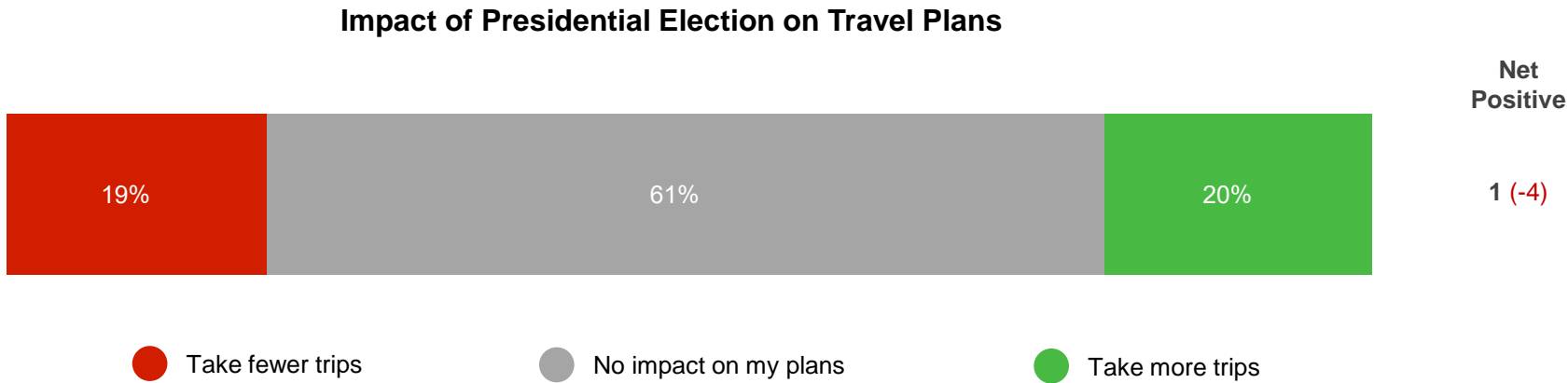
“I am more likely to travel to Ontario, Canada in the next 12 months because of the favourable exchange rate.”



**Asterisk indicates significant difference from previous wave*

I2. How much do you agree or disagree with the following statement? “I am more likely to travel to Ontario, Canada in the next 12 months because of the favourable exchange rate.” (Excludes “Don’t know”)
All respondents. n=1588

The US Presidential election appears to still have little to no impact on the international travel plans of respondents over the next 12 months.

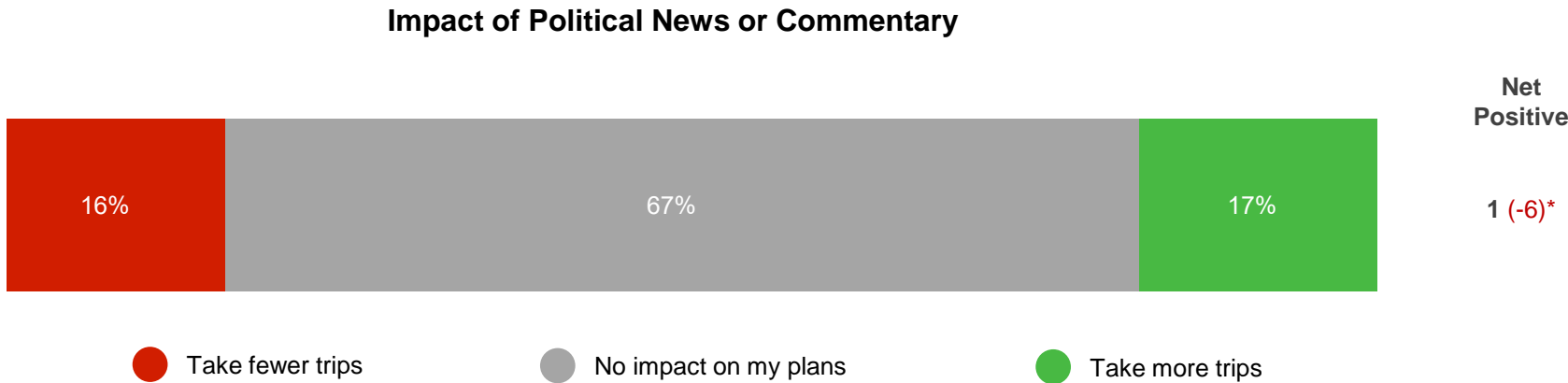


**Asterisk indicates significant difference from previous wave*

I3. How did the outcome of the recent Presidential election influence your international travel plans in the next 12 months?
All respondents. n=1614

The majority of respondents still report that political news or commentary does not influence their travel plans to Ontario.

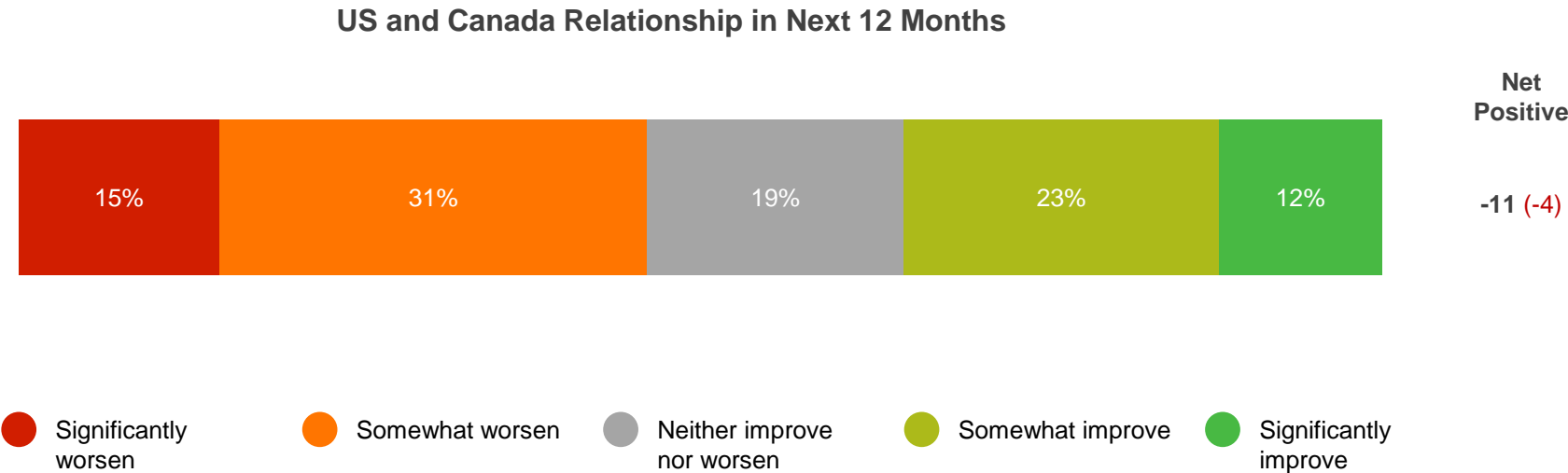
However, there is a decrease of those taking more trips since the previous wave.



**Asterisk indicates significant difference from previous wave*

I3B. How have recent political news or commentary about Canada influenced your travel plans to Ontario in the next 12 months?
All respondents. n=1614

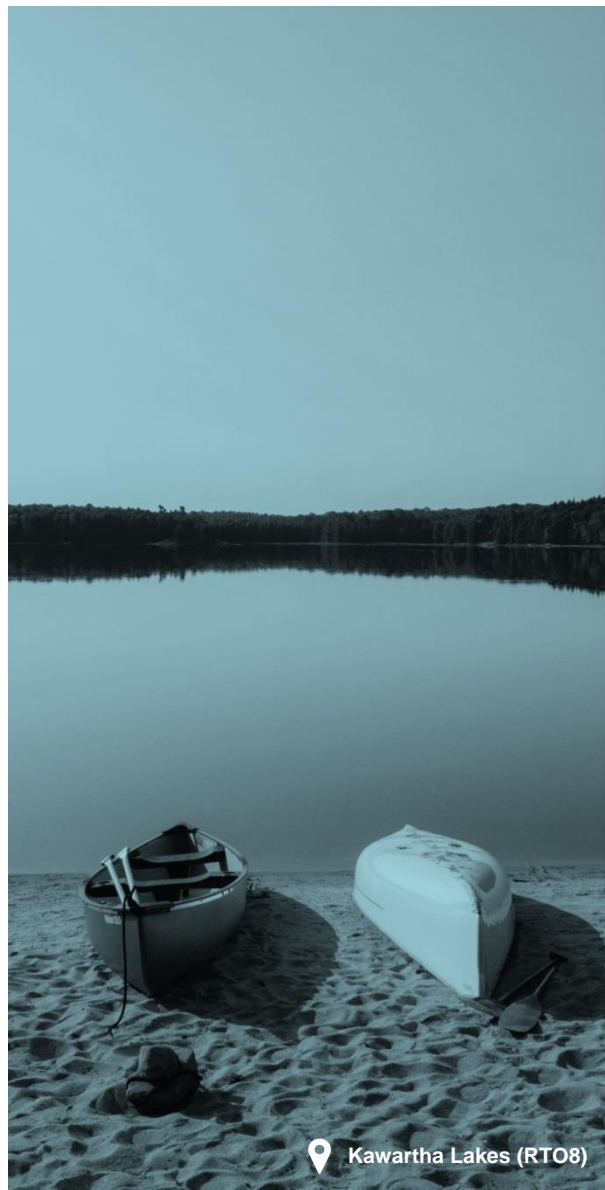
There are more US residents who think that US and Canada’s relationship in the next 12 months will worsen. This metric has remained consistent since the previous wave.



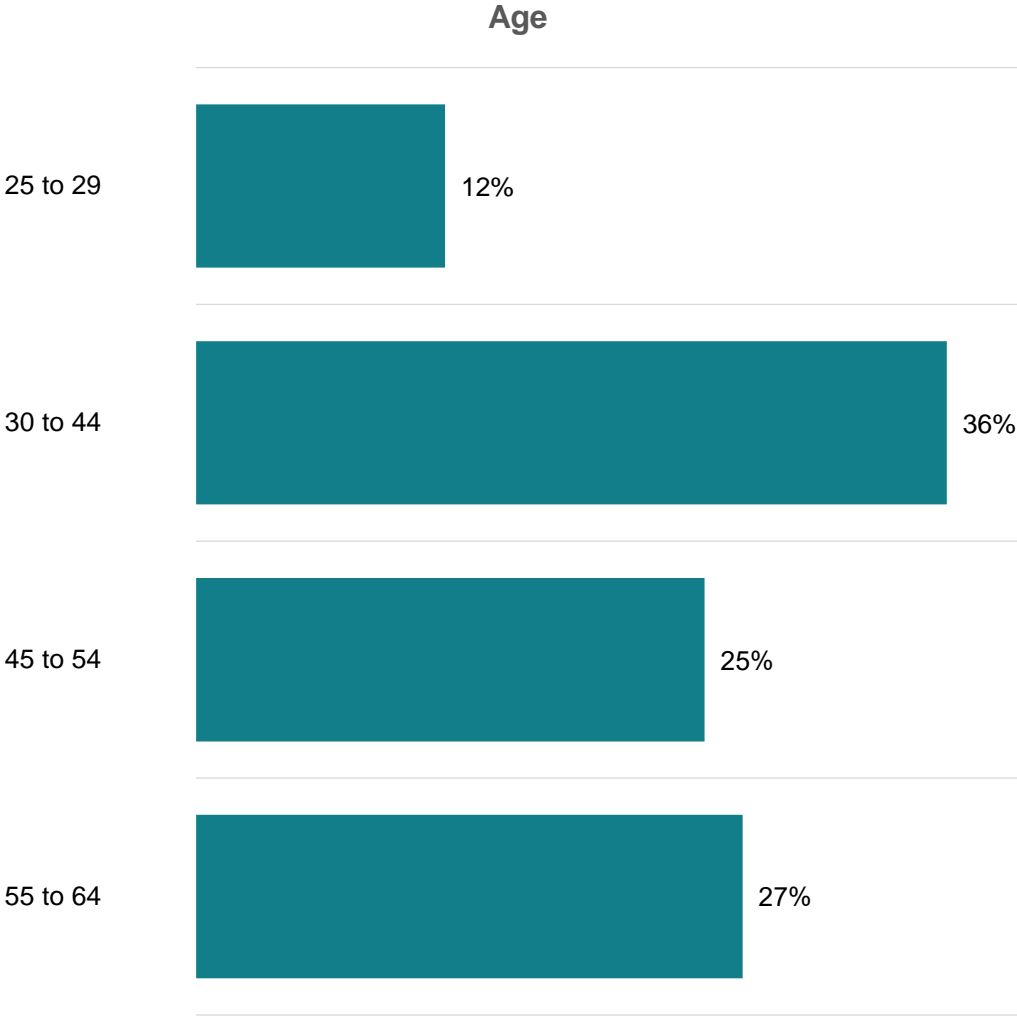
**Asterisk indicates significant difference from previous wave*

I4. Over the next 12 months, how do you think the relationship between the US and Canada will change? (Excludes “Don’t know”) All respondents. n=1519

DEMOGRAPHICS

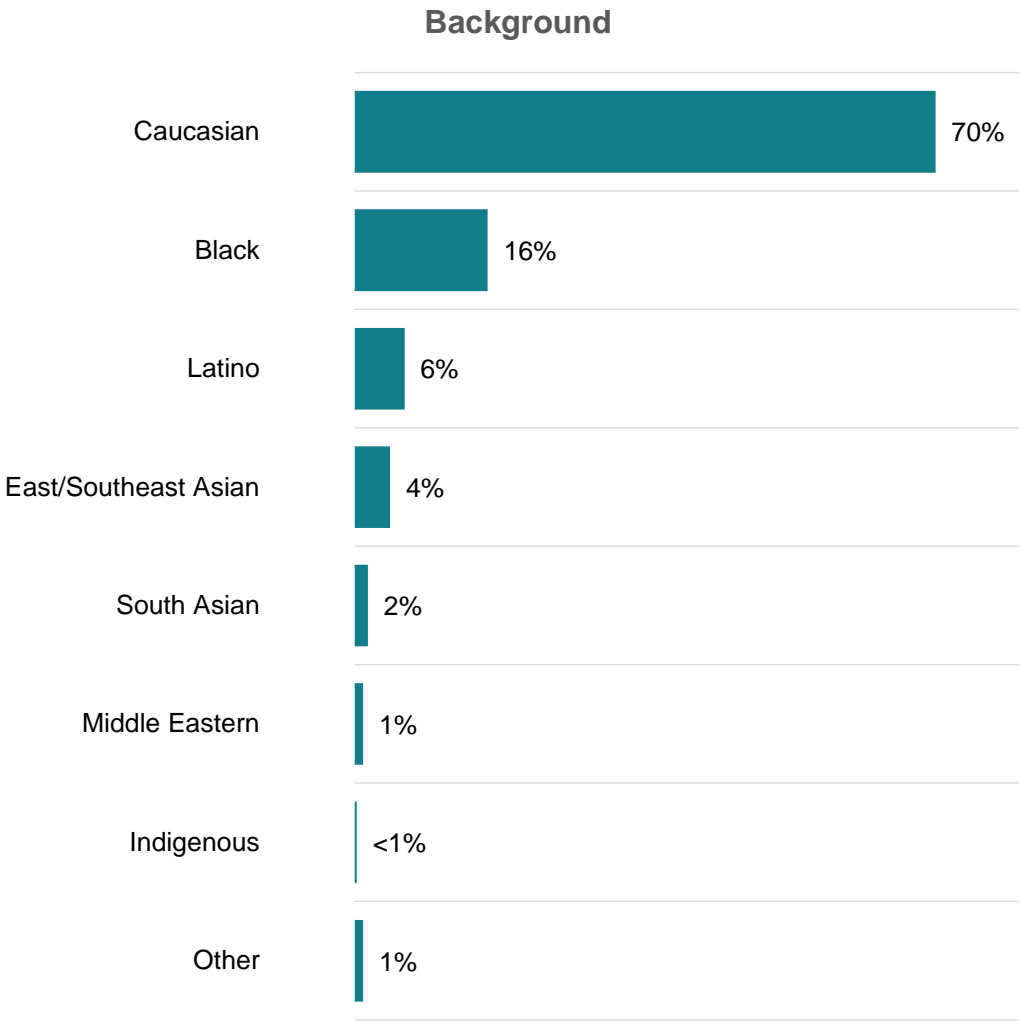


 Kawartha Lakes (RTO8)

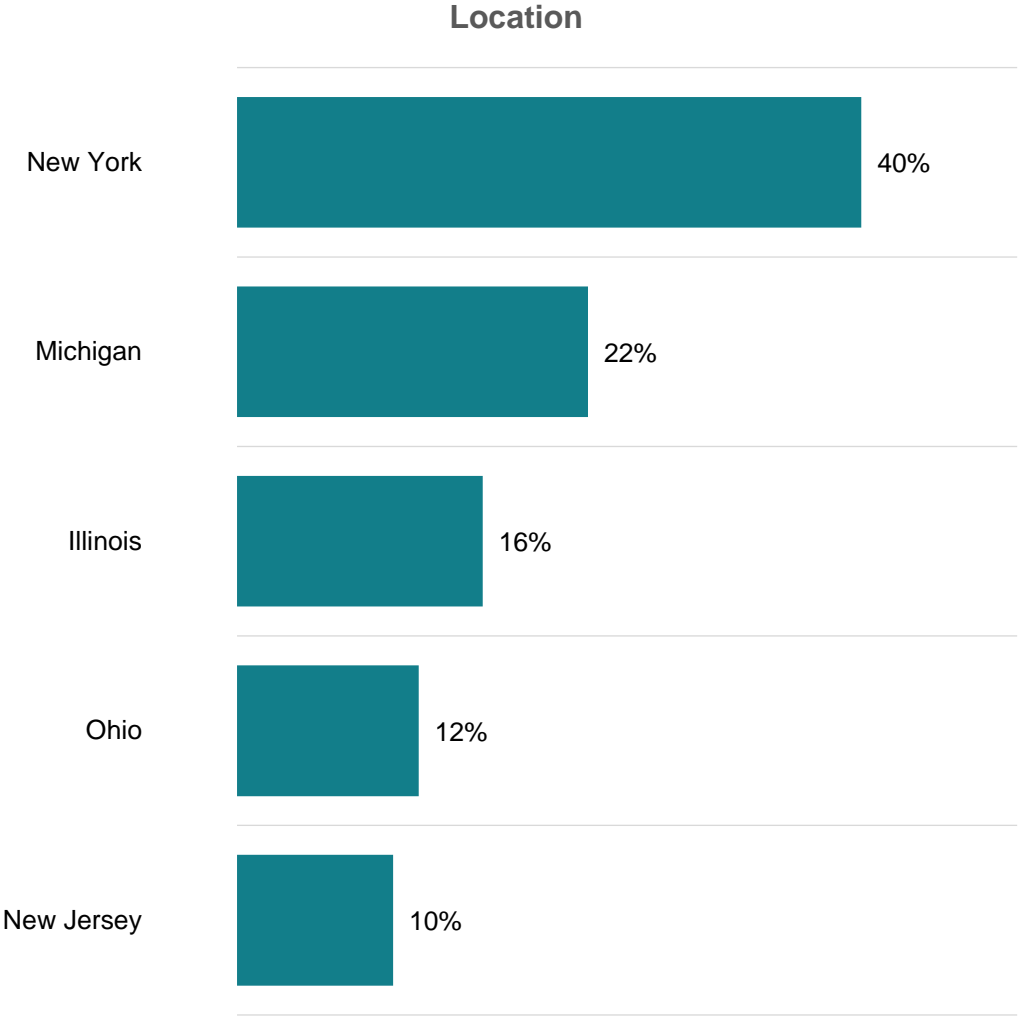


SC1. Which category below includes your age: (Single-select)
All respondents. n=1614



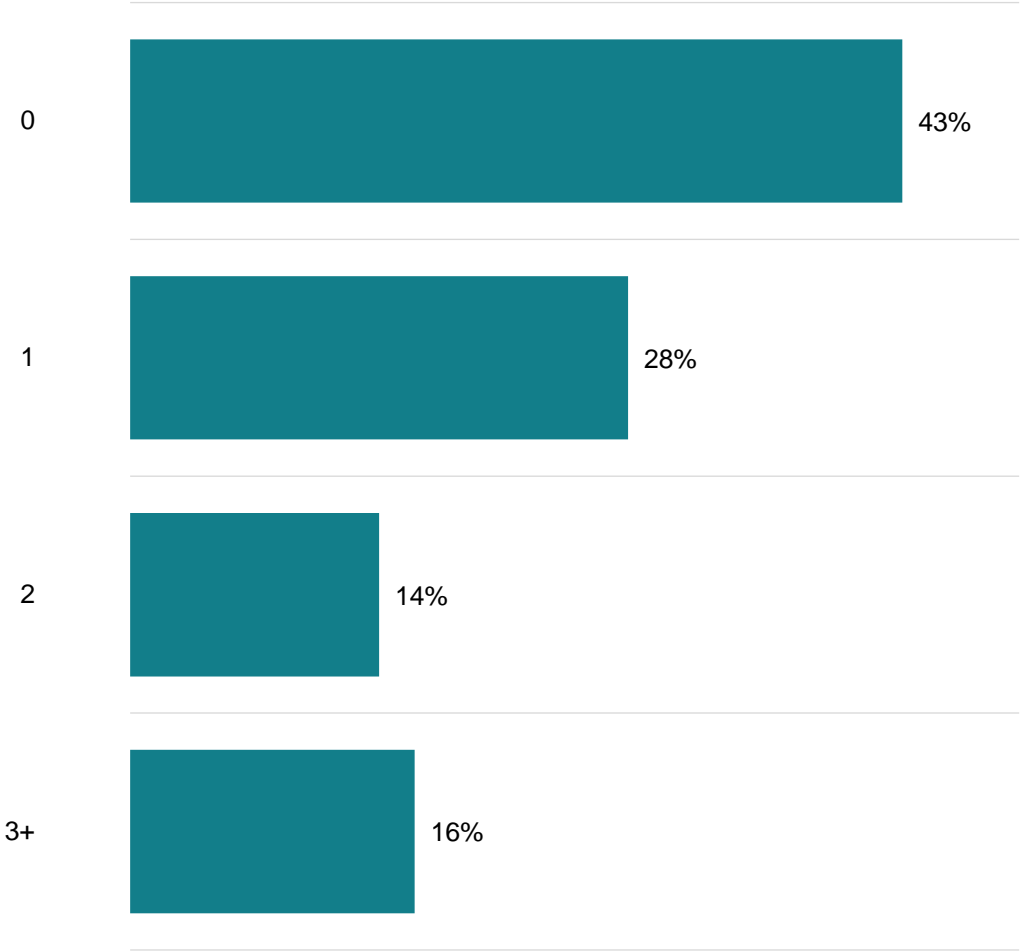


SC3 While most people in the United States view themselves as American, many have different ethnic or cultural origins or family backgrounds. With this in mind, please indicate which of these best describes your ethnic or cultural background:(Single-select)
All respondents. n=1614

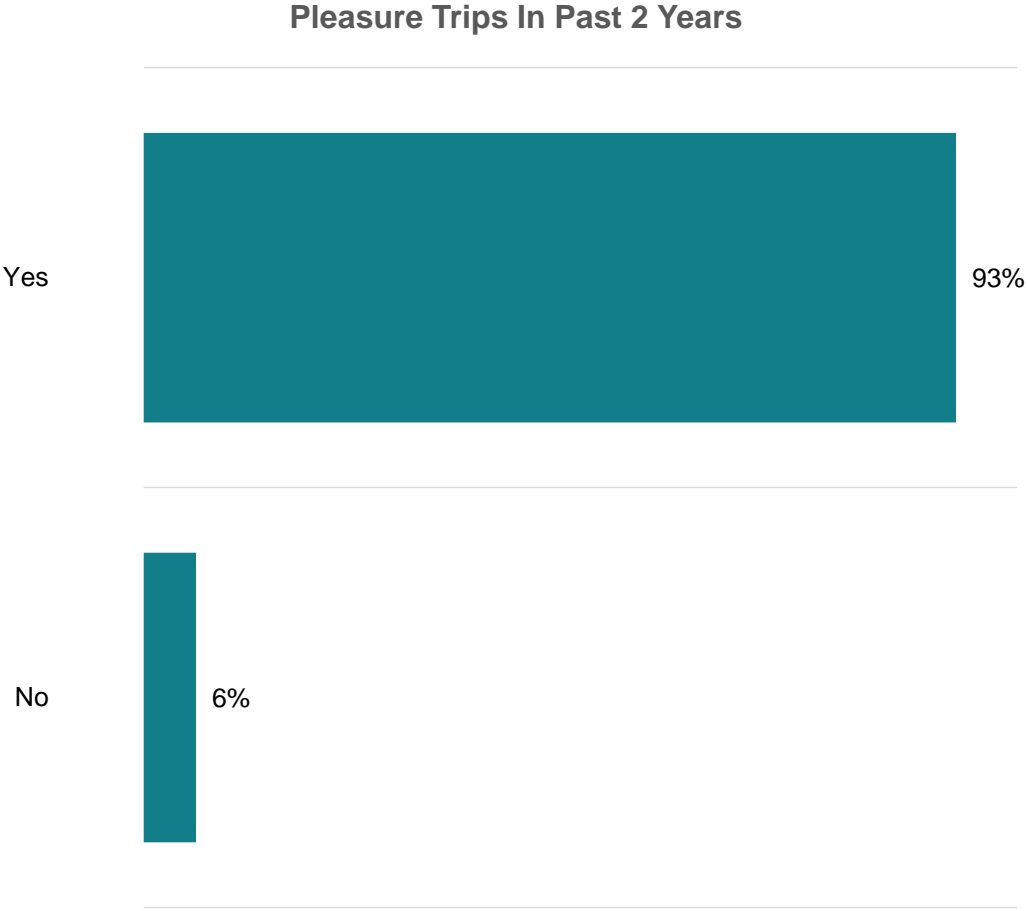


SC4 Which of the following states do you live in? (Single-select)
All respondents. n=1614

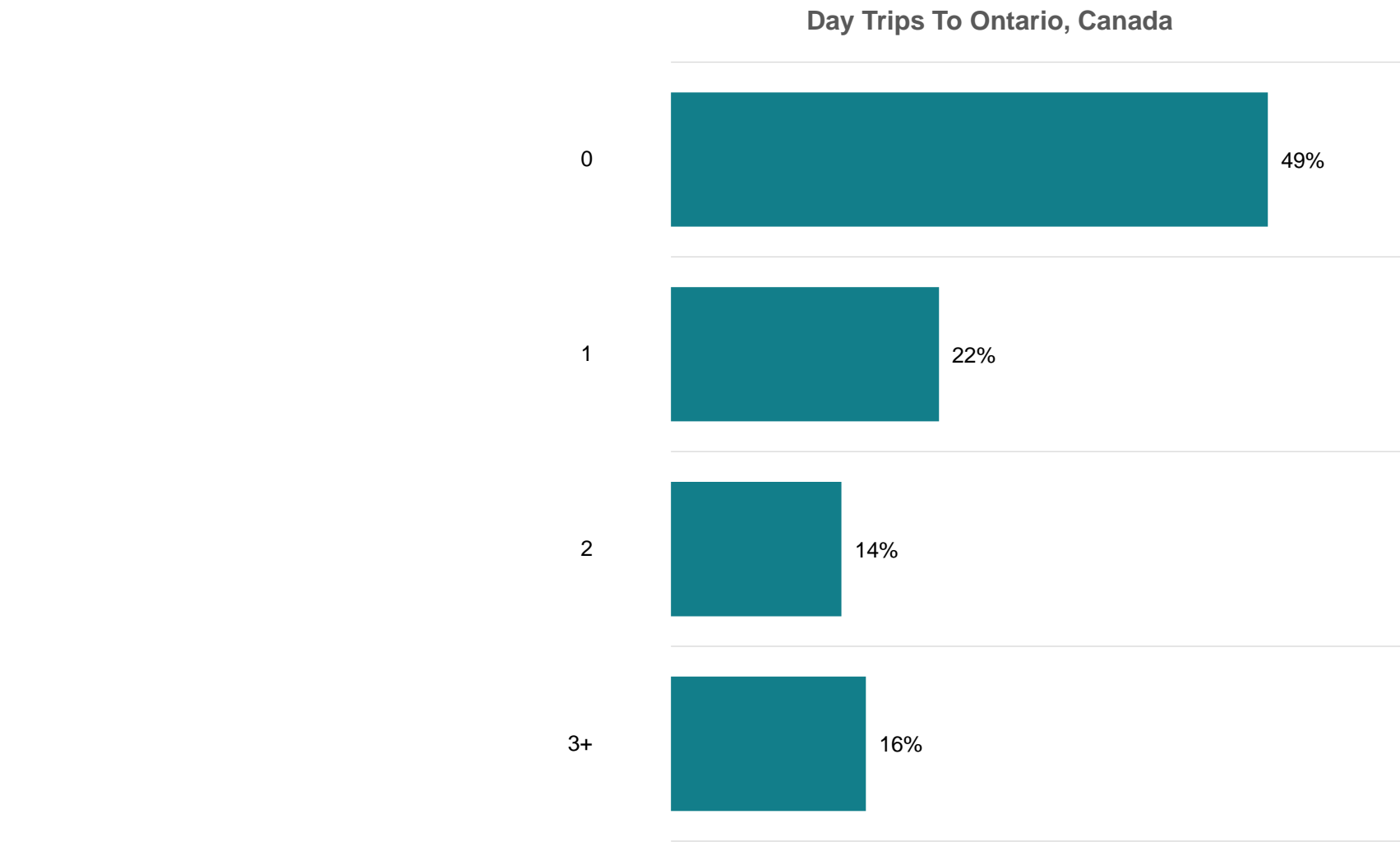
One or More Nights Trips To Ontario, Canada



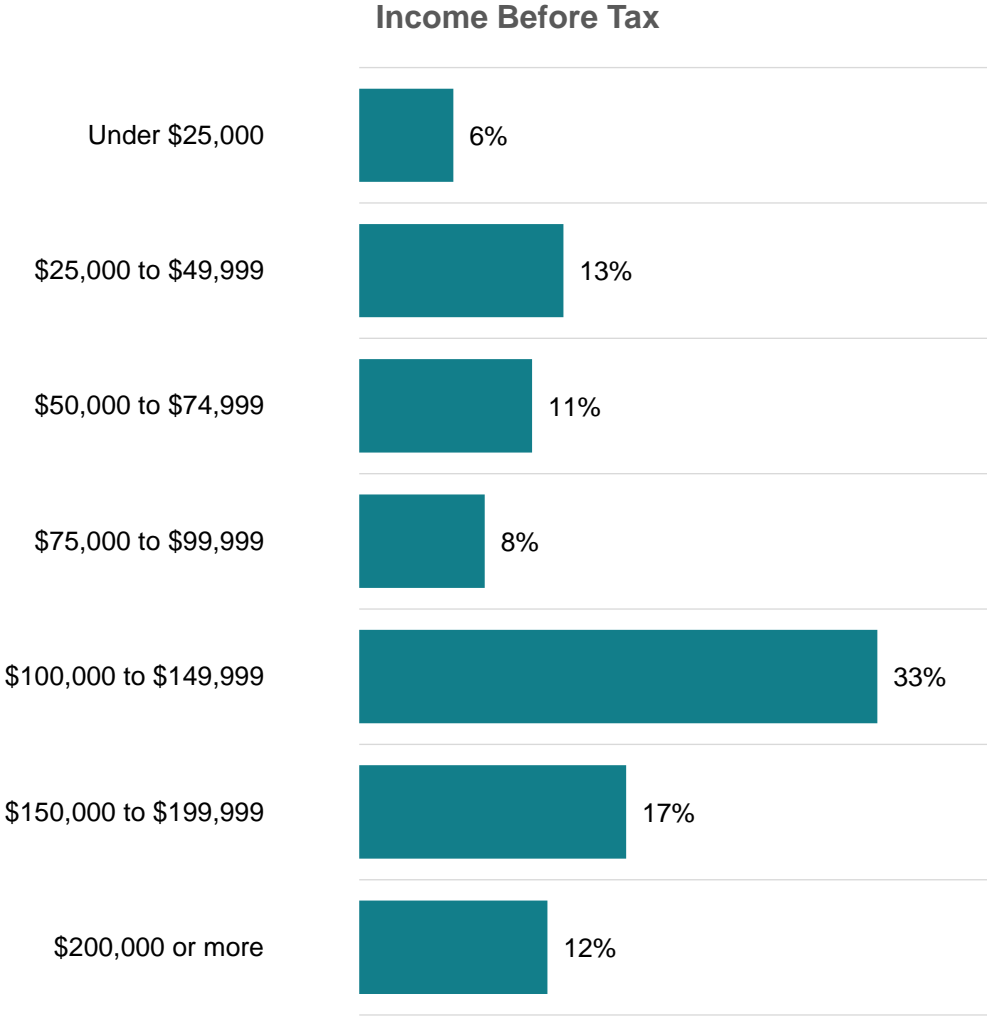
SC7_inclzero_2 In the next 12 months how many pleasure trips of one or more nights away from home are you planning to take to Ontario, Canada?(Open ended)
All respondents. n=1614



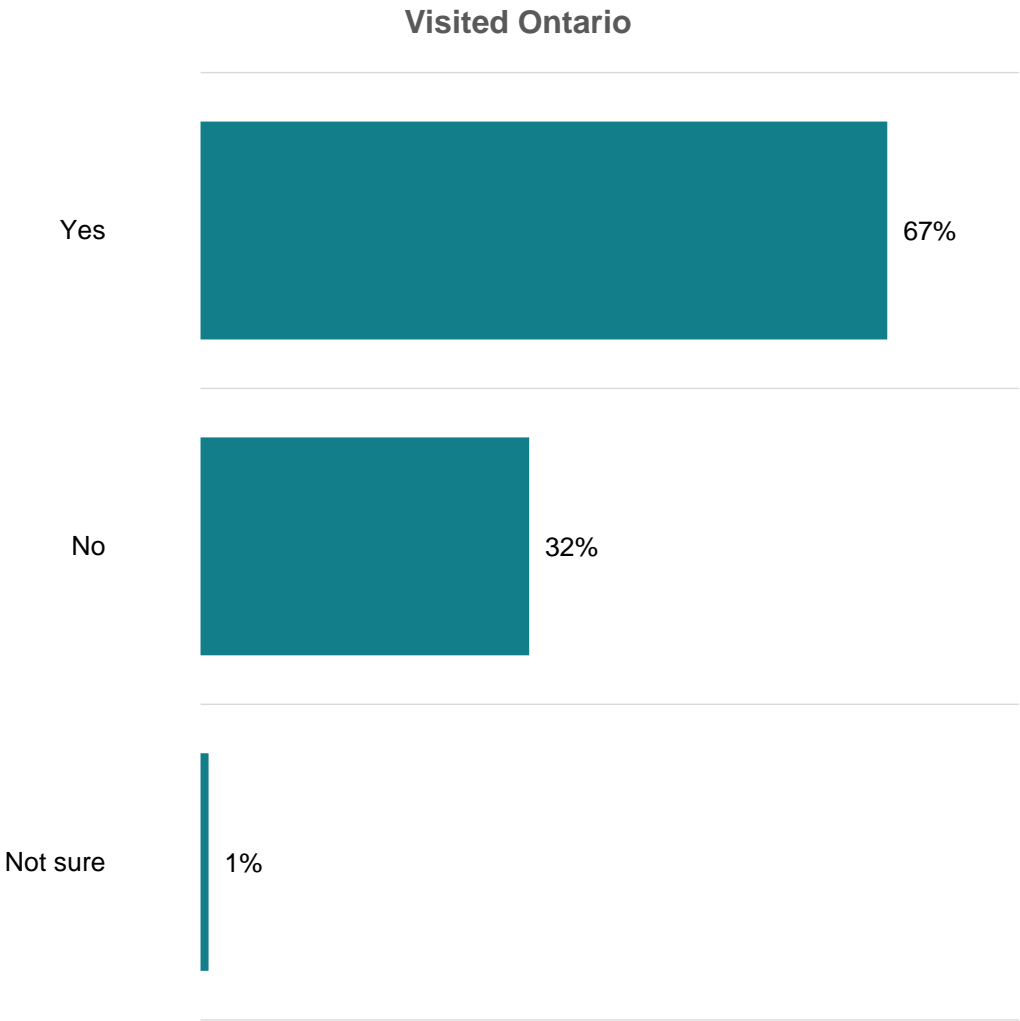
SC9 Have you taken a pleasure trip of one or more nights away from home anywhere in the past 2 years? (Single-select)
All respondents. n=1614



SC10 In the next 12 months, how many day trips are you planning to take to Ontario, Canada? (If 'None', type in '0') (Open ended)
All respondents. n=809



SC11 Which of the following best describes your household’s total annual income before taxes? (Single-select)
All respondents. n=1614



Children In Household

Yes



47%

No



53%