CONTEXT RESEARCH GROUP

CONTEXT IS EVERYTHING

US PULSE SURVEY WAVE 3

Prepared for: Destination Ontario

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CONTENTS

KEY OBJECTIVES

Niagara Falls

Overview:
CRG continued to work collaboratively with Destination Ontario to undertake a pulse study among US High Value Guests (HVGs) from Fly and Drive markets. The goal of the ongoing 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
- Deeper insights into recent travel experiences, financial pressures, and trip planning behaviours
- Perceptions of U.S.–Canada relations, border crossings, and awareness of upcoming events such as the FIFA 2026 World Cup

METHODOLOGY

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	Wave 3
Total	1,610	1,614	1,622
US Drive	808	809	812
US Fly	802	806	810

Margin of Error:
- ± 2.4%

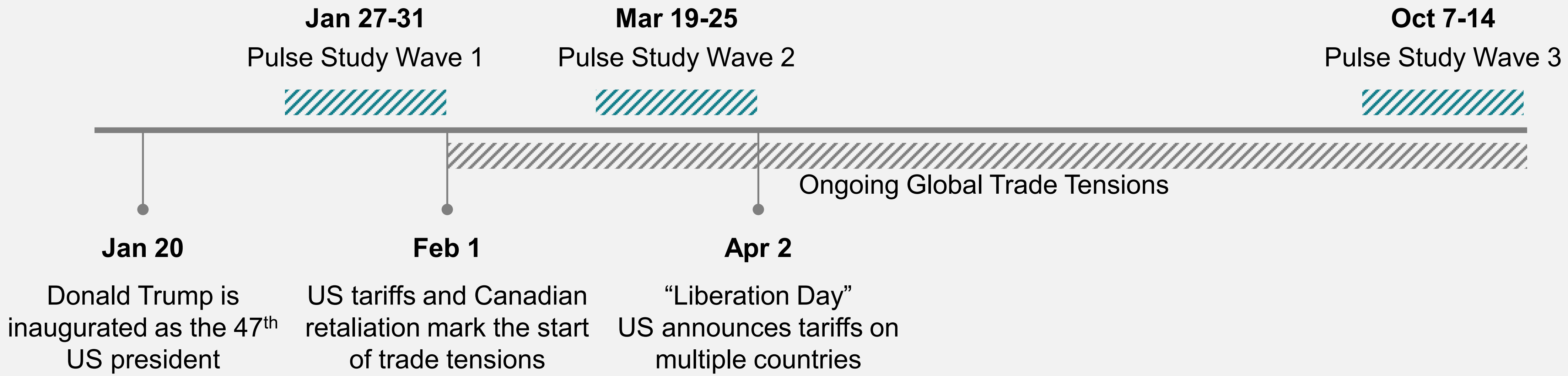
Weighting:
The results were weighted by age, gender and region to ensure that the sample's composition reflects that of the US population.

Fieldwork Date:
- Wave 1: January 27th – January 31st, 2025
- Wave 2: March 19th – March 25th, 2025
- Wave 3: October 7th – October 14th, 2025

Median Length of Interview:
- 8.7 minutes

CONTEXTUAL TIMELINE


Niagara Falls



Jan 27-31
Pulse Study Wave 1

Mar 19-25
Pulse Study Wave 2

Oct 7-14
Pulse Study Wave 3

Ongoing Global Trade Tensions

Jan 20
Donald Trump is inaugurated as the 47th US president

Feb 1
US tariffs and Canadian retaliation mark the start of trade tensions

Apr 2
“Liberation Day” US announces tariffs on multiple countries


Niagara Falls

METHODOLOGY UPDATES

Starting in Wave 3 (October 2025), the survey was updated to capture deeper insights into recent travel experiences, financial pressures, and trip planning habits, alongside perceptions of US-Canada relations, border crossings, and upcoming events like FIFA 2026.

1) Feeling of Welcoming
Added two questions focusing on overnight trips

W3A. Have you taken an overnight pleasure trip to Ontario, Canada since February 2025?
W3B. Thinking about your most recent overnight pleasure trip to Ontario, Canada, how much do you agree or disagree with the following statements?
  Locals in Ontario were welcoming and friendly
  Customer service staff made me feel welcome
  I felt included and respected as an American visitor
  I felt safe and comfortable during my trip
  I felt safe and comfortable at the border [Only if US Drive]

2) Financial Assessment
Added a section to further understand changes to travellers' ability to spend on pleasure travel, and factors impacting it.

FA1. Compared to 12 months ago, how has your ability to spend on pleasure travel changed?
FA2. How much do you agree or disagree that the following factors has affected your ability to take pleasure trips in the past 12 months?
  Rising cost of living
  Personal financial situation (e.g., income, savings)
  Gas prices [IF US Drive]

METHODOLOGY UPDATES

Niagara Falls

3) Travel Preferences
Added a question on trip planning behaviours

T2. For each seasonal trip, how far ahead do you usually make or book your travel plans?

4) Awareness
Added a question on trade relationship between the US and Canada

A4. Compared to 12 months ago, how would you describe the current trade relationship between the US and Canada?

METHODOLOGY UPDATES

Niagara Falls

5) Impact on Travel Plans
Added two questions to further understand the impact of border crossing on travel plans.

I1A. How much do you agree or disagree with the following statement?
“I am concerned about border crossings, entry requirements or travel restrictions returning to the US from Canada.”
I1B. You mentioned that are concerned about returning to the US from Canada. Which of the following, if any, describe your concerns? Please select all that apply.
Concerns about delays or long lineups at the border
Concerns about customs inspections
Concerns about immigration questioning or enforcement
Concerns about required documentation or paperwork
Concerns due to my citizenship, visa, or residency status
Concerns about paying duties, taxes or fees at the border
Other (please specify): ______ [Lock]
Not sure [Lock] [Exclusive]

6) FIFA
Added a section on FIFA awareness and likelihood to visit Toronto

F1. Before today, how aware are you that Toronto, Canada is one of the official host cities for the FIFA 2026 World Cup?
F2. How likely are you to visit Toronto, Canada because it’s hosting the 2026 FIFA World Cup?

METHODOLOGY

Niagara Falls

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

EXECUTIVE SUMMARY – INSIGHTS

Ontario and Canada Remain Strong Destinations
Over half of US residents are likely to visit Ontario in the next 12 months, with sustained enthusiasm across the board and especially in the US Fly market. Both Ontario and Canada continue to be rated highly for friendliness, inclusivity, and value, and Ontario's reputation as an accessible destination is growing. *(Slides 13-16)*

Welcoming Perceptions Improve Sharply
Perceptions of Canada as a welcoming destination have improved significantly in comparison to the previous wave, with Canada rising from fourth to first place among destinations. This positive trends aligns with stronger perceptions of Ontario being a safe and secure destination for travellers and having friendly locals. *(Slides 17-23)*

Easing Political Tension and Travel
Optimism about the US-Canada relationship improving is resonating well in the US market compared to the previous wave. Anti-American sentiment is no longer a primary barrier to visiting, and political tensions between the US and Canada appear to be less impactful on the perception of Canada as a welcoming destination. *(Slides 22, 34-39)*

Shifts in Border Crossing Concerns
Although around half of respondents remain concerned about crossing the border into Canada, this figure has declined significantly since the previous wave. Travellers express greater concern about the return crossing to the US, mainly due to potential delays, documentation, paperwork, and immigration-related questions.*(Slides 34-39)*

Financial Realities and Barriers
Cost is the leading barrier to travel, surpassing political factors as the top concern. While overall spending ability remains steady, rising living expenses, personal finances, and gas prices are making travel challenging. As a result, future travel plans are shifting, with more individuals opting to take fewer trips instead of maintaining previous habits. This trend is paired with increased mindfulness around spending, demonstrated by greater awareness of Ontario's favourable exchange rate compared to the previous wave. *(Slides 24-26, 27-30, 31-33)*

FIFA 2026: An Emerging Motivator
Half of US residents are aware Toronto will host the FIFA 2026 World Cup, and two in five say they're likely to visit Toronto because of the World Cup, especially Fly market travellers and New York City residents. *(Slides 40-42)*

EXECUTIVE SUMMARY – OPPORTUNITIES

Addressing Potential Barriers
Concerns about US-Canada political tensions and potential anti-American sentiment have become less prominent across both the US Fly and Drive markets. In the previous wave, anti-American sentiment was reported as a primary barrier but now ranks second to cost. For this wave, cost is the most frequently cited potential deterrent to visiting Ontario.

Given these financial concerns, value perception must be a central focus. Ontario's favourable exchange rate provides an advantage, helping offset rising travel costs and allowing Americans to enjoy more for less. By tying affordability to high-quality experiences and diverse attractions, messaging can highlight how Ontario transforms every dollar into greater value. Reinforcing this affordability advantage will make Ontario even more appealing to both cost-conscious and experience-driven travellers, positioning it as a destination where the experience matches and exceeds the investment.

Reinforcing Ontario's Welcoming Appeal
Perceptions of Ontario and Canada as friendly and inclusive destinations have strengthened notably, offering a key opportunity to reinforce this positive momentum. The improvement in how welcoming Canada is perceived, rising from fourth to first place, shows that travellers are responding to experiences that make them feel safe, comfortable, and genuinely valued. Marketing efforts should continue emphasizing Ontario's warmth and ease of access, supported by storytelling that showcases friendly locals, inclusive communities, and effortless travel experiences.

FIFA 2026 as a Travel Catalyst
FIFA 2026 presents a major chance to convert interest, especially among Fly market and NYC residents, into booked trips. Early and targeted promotion can maximize Ontario's share of major event visitation.

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, showing 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 is perceived as a friendly and inclusive destination to all visitors, providing good value for money. Additionally, US residents find border and entry requirements to Ontario simple, and the sentiment that Ontario is a politically neutral destination is increasing, compared to the previous wave.

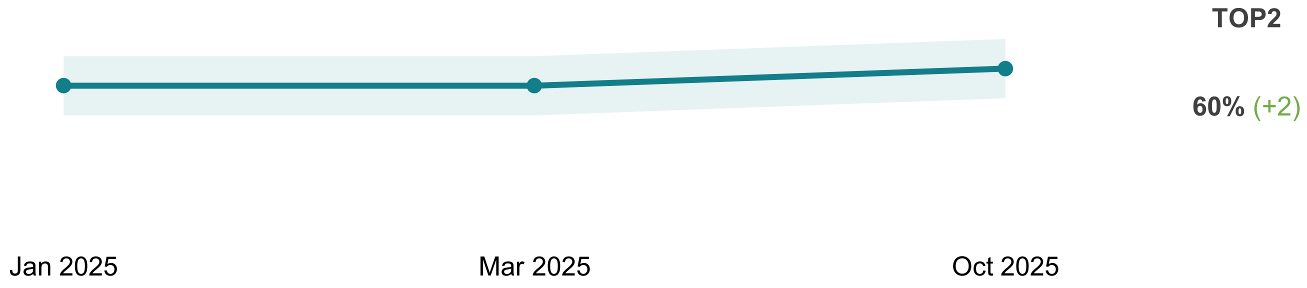
PLEASURE TRIPS TO ONTARIO

Three in five US residents are likely to take an overnight trip to Ontario in the next 12 months. This figure has remained steady since the previous waves in January and March 2025.

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 (65%) compared to those in the US Drive market (55%).

Those who are likely to travel overnight to Ontario tend to be younger (30-44: 71%), male (65%) 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

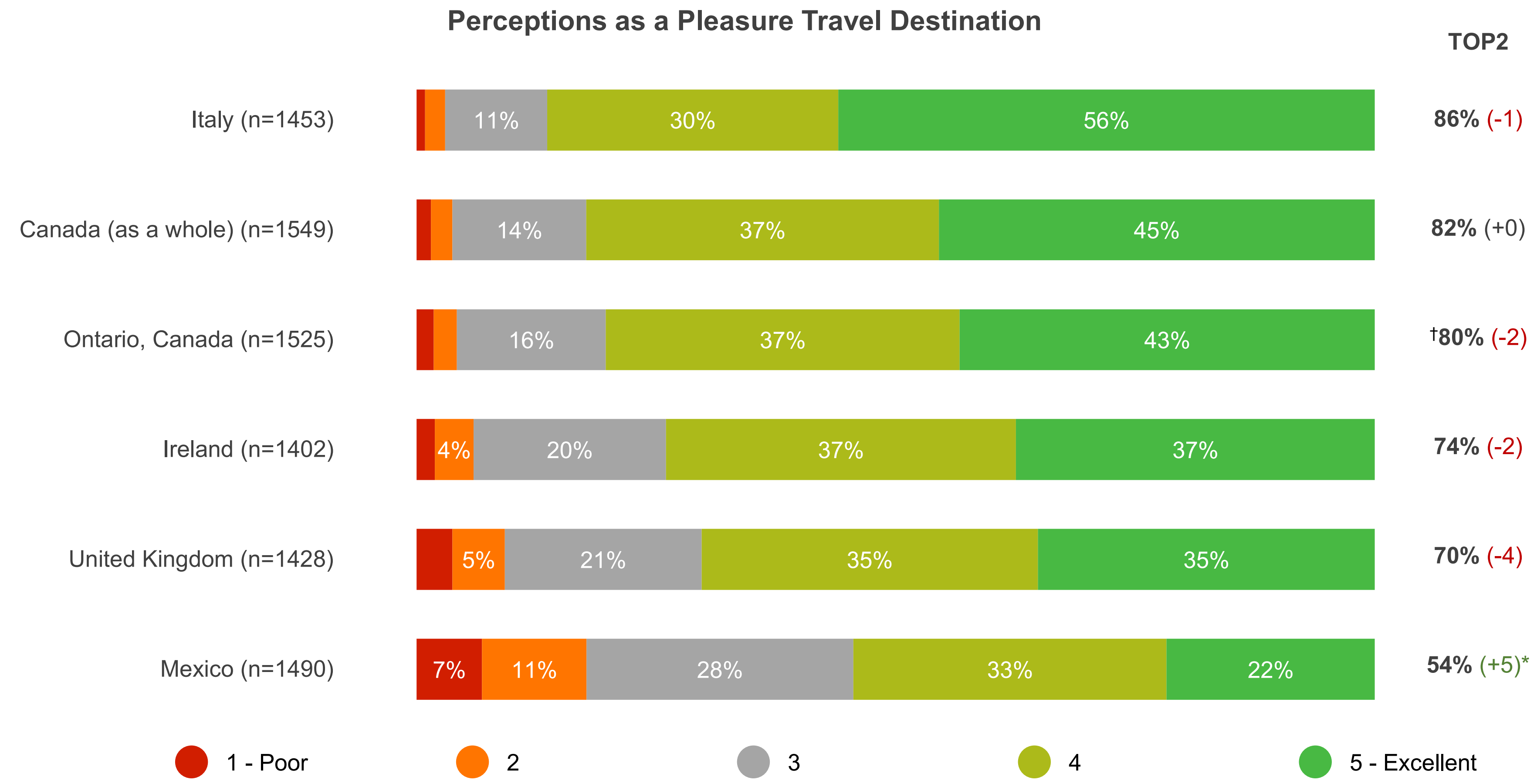
Italy and Canada continue to be rated highly as pleasure travel destinations among US residents, with more than four in five giving them top ratings.

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 Canada positively, especially in the US Fly (86%).

†2024 benchmark data for Ontario: 79%



Perceptions as a Pleasure Travel Destination

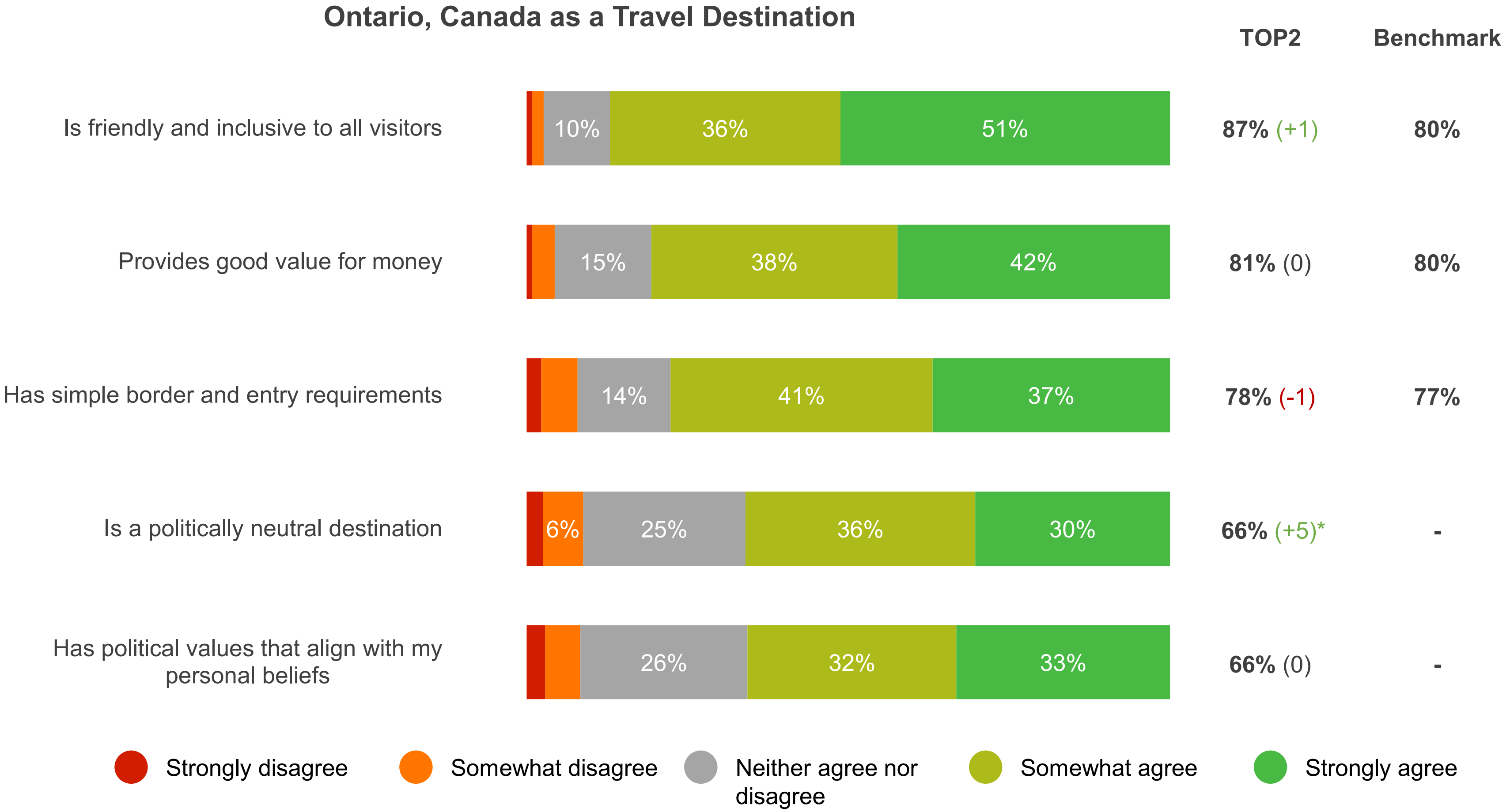
**Asterisk indicates significant difference from previous wave*

P1. Overall, how would you rate the following as pleasure travel destinations? (Labels <4% not visualized) (Excludes "Don't know")

ONTARIO AS A TRAVEL DESTINATION

Nine in ten believe that Ontario is friendly and inclusive to all visitors; while seven in ten believe that Ontario is politically neutral, and that the political values align with their personal beliefs.

The perception that Ontario is a politically neutral destination has increased since the previous wave.



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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

Perceptions of Canada as a welcoming destination among US residents improved sharply, with Canada rising from 4th to 1st place among all destinations. This surge likely reflects stronger summer travel experiences, effective marketing highlighting Canadian friendliness, and a stabilization in US-Canada relations compared to early 2025.

Positive outlooks have also grown, expectations that Canada will become even more welcoming increased by 25 points since the previous wave, driven by views of Canada as safe, secure, and home to friendly locals. Political tensions and anti-American sentiment have become less influential; while cost has emerged as the leading barrier for Ontario travel.

This trend highlights a need for continuous efforts to restore confidence. Reinforcing positive messages about Canadians being friendly, inclusive, and welcoming toward US visitors will be important in maintaining this positive attitude towards Canada travels.

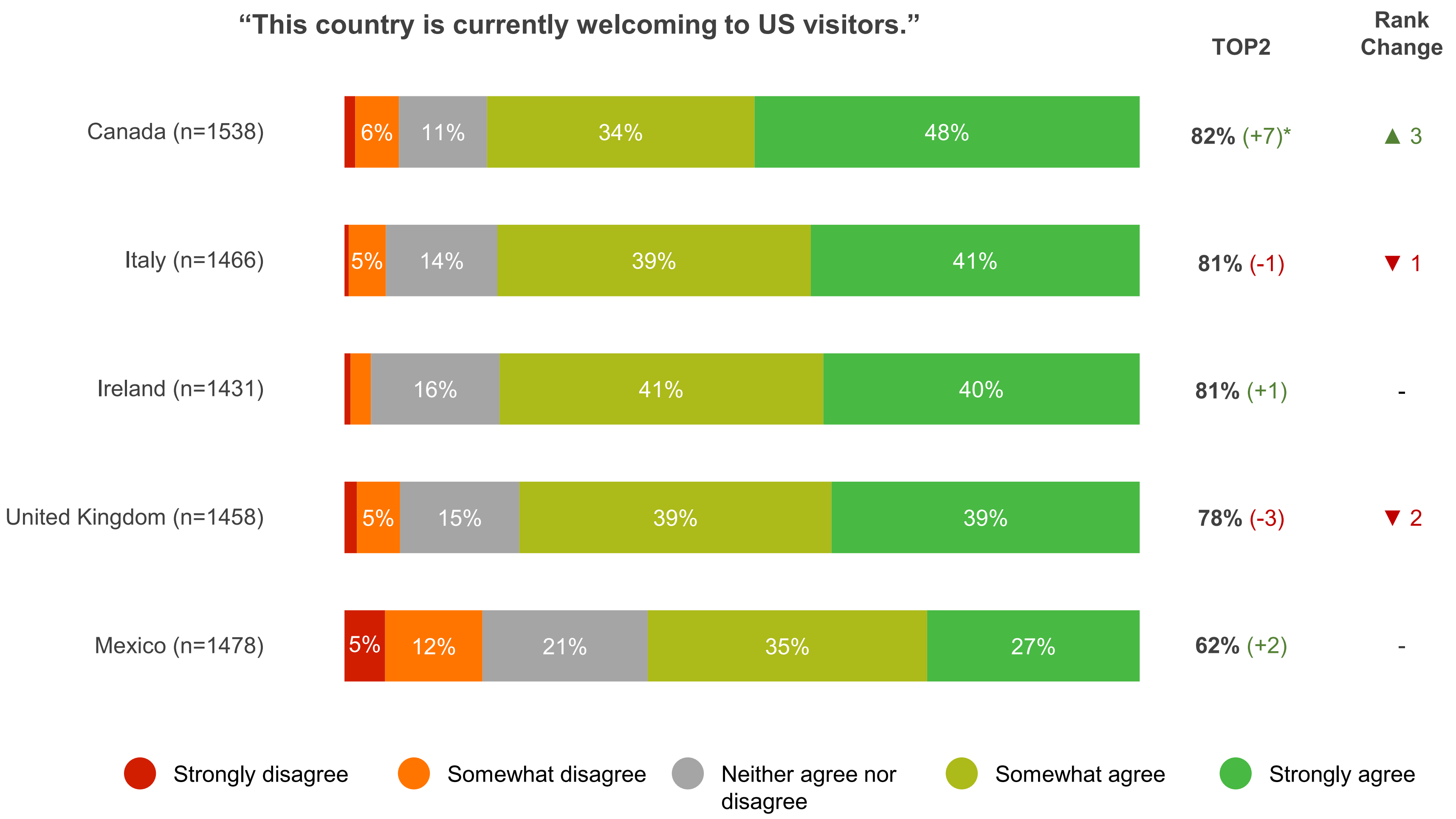
WELCOMING TO US VISITORS

Perceptions of Canada as a welcoming destination among US residents improved significantly from the previous wave, with Canada moving from 4th to 1st place among all countries evaluated.

This improvement likely reflects positive summer travel experiences and successful marketing efforts that emphasized Canada's warmth, hospitality, and friendliness. It may also be influenced by stabilization in US-Canada relations, which have eased compared to earlier in 2025.

Younger travellers (ages 30-44) and those from US Fly markets are especially likely to view Canada as welcoming, significantly more so than respondents from the Drive market.

"This country is currently welcoming to US visitors."



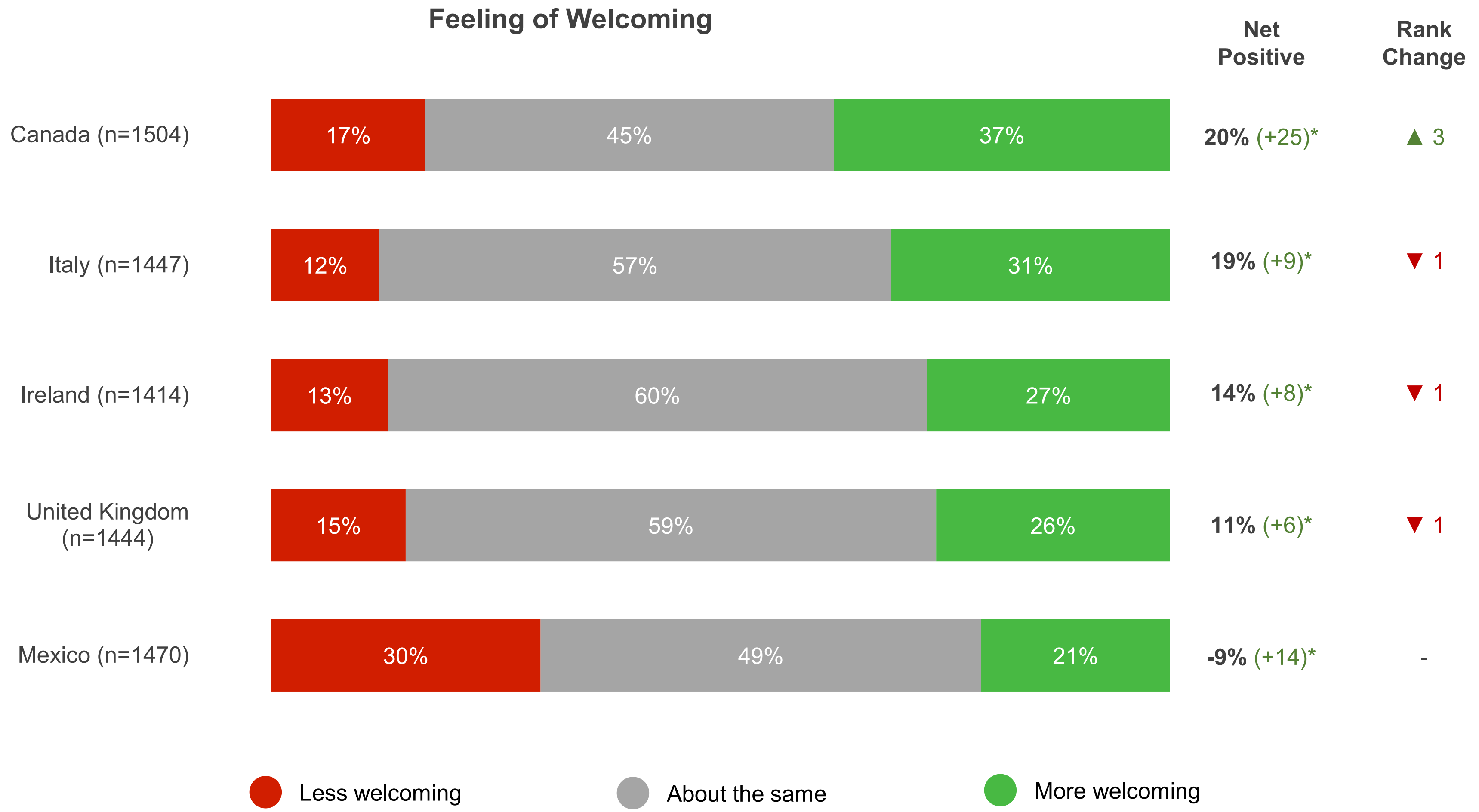
Asterisk indicates significant difference from previous wave

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 OUTLOOK: ANTICIPATED CHANGES ACROSS TOP DESTINATIONS

Over the next year, more US residents think that Canada will be more welcoming to US visitors. This perception has shifted positively by 25 points since the previous wave.

This is another insight indicating that political tensions have been less impactful on travel behaviours and the perception of Canada as a welcoming destination.



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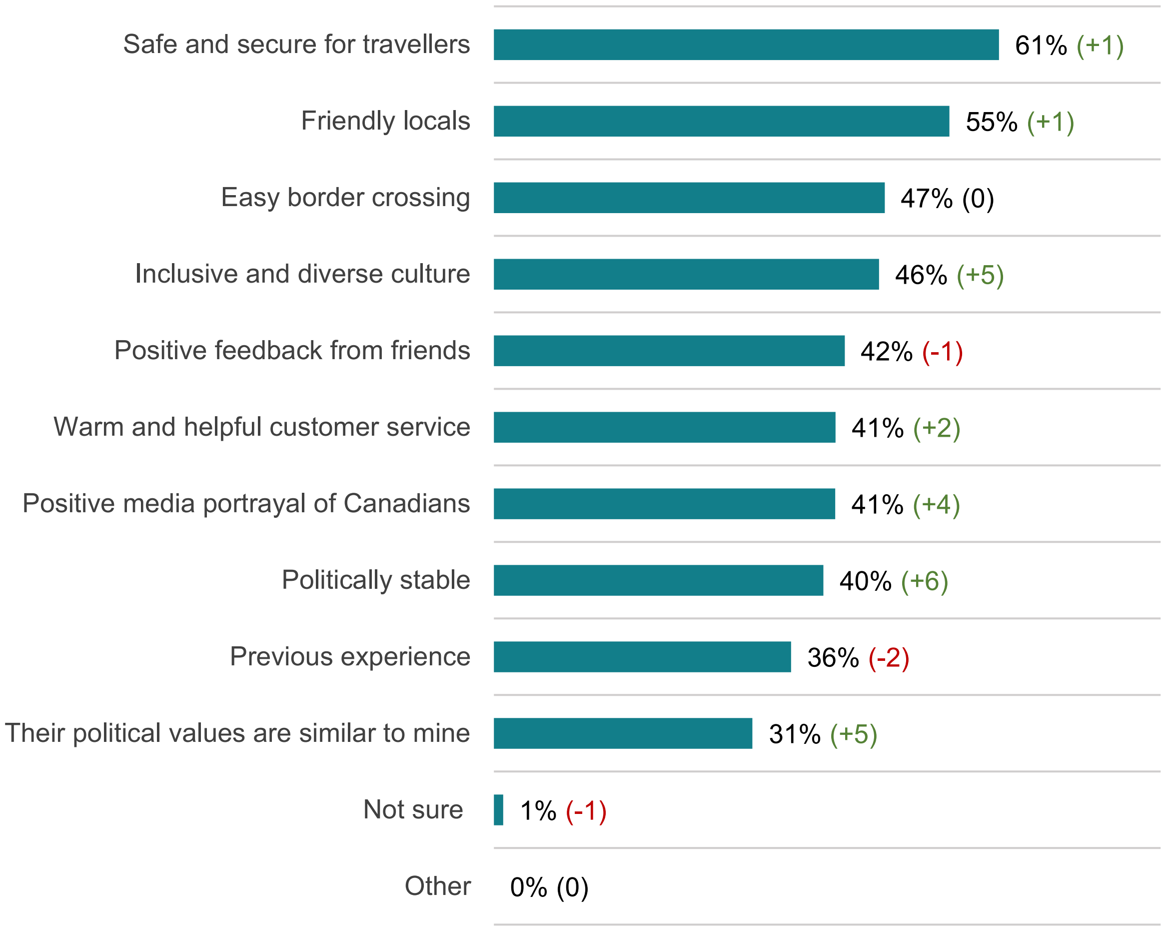
W1B. Thinking ahead to one year from now, do you believe the following countries will feel more welcoming, less welcoming, or about the same as they do today to US visitors? (Excludes "Don't know")

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.

The perception that Ontario is politically stable has significantly increased since the previous wave. This increase 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	61% (+1)	-	55% (+2)	65% (-1)
Friendly locals	55% (+1)	-	55% (0)	55% (+3)
Easy border crossing	47% (0)	-	45% (+2)	48% (-1)
Inclusive and diverse culture	46% (+5)	▲ 1	38% (-1)	53% (+9)
Positive feedback from friends	42% (-1)	▼ 1	33% (-6)	49% (+2)
Warm and helpful customer service	41% (+2)	-	36% (-2)	45% (+5)
Positive media portrayal of Canadians	41% (+4)	▲ 1	38% (+6)	43% (+1)
Politically stable	40% (+6)	▲ 1	33% (+4)	45% (+7)
Previous experience	36% (-2)	▼ 2	37% (-3)	34% (-1)
Their political values are similar to mine	31% (+5)	-	24% (+1)	36% (+8)
Not sure	1% (-1)	-	2% (-1)	0% (0)
Other	0% (0)	-	0% (0)	0% (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=553

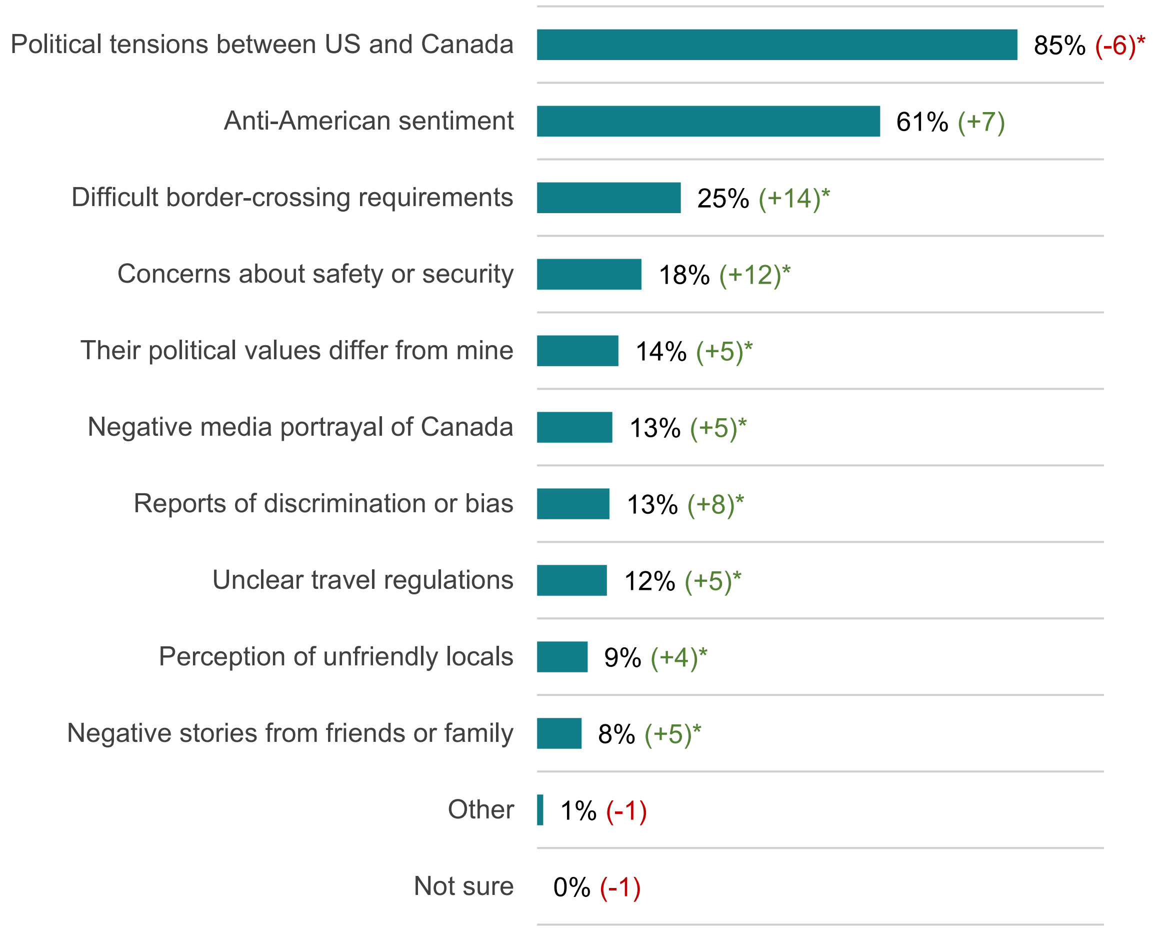
CANADA LESS WELCOMING TO US VISITORS

Significantly less respondents are citing political tensions between US and Canada and anti-American sentiment as reasons for thinking Canada will be less welcoming, compared to the previous waves.

This shows that the perception of political tension between the US and Canada has been having less impact on how welcoming Canada is.

However, the anti-American sentiment remains high. 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	85% (-6)*	-	80% (-12)*	90% (+1)
Anti-American sentiment	61% (+7)	-	53% (+4)	68% (+10)
Difficult border-crossing requirements	25% (+14)*	-	26% (+13)*	24% (+16)*
Concerns about safety or security	18% (+12)*	▲ 3	21% (+13)*	16% (+12)*
Their political values differ from mine	14% (+5)*	▼ 1	15% (+5)	14% (+5)
Negative media portrayal of Canada	13% (+5)*	▼ 1	12% (+3)	14% (+7)
Reports of discrimination or bias	13% (+8)*	▲ 1	14% (+7)	12% (+8)*
Unclear travel regulations	12% (+5)*	▼ 1	10% (+2)	15% (+9)*
Perception of unfriendly locals	9% (+4)*	-	10% (+4)	8% (+4)
Negative stories from friends or family	8% (+5)*	-	9% (+6)*	7% (+5)
Other	1% (-1)	-	2% (0)	0% (-2)
Not sure	0% (-1)	-	0% (-1)	0% (0)

**Asterisk indicates significant difference from previous wave*

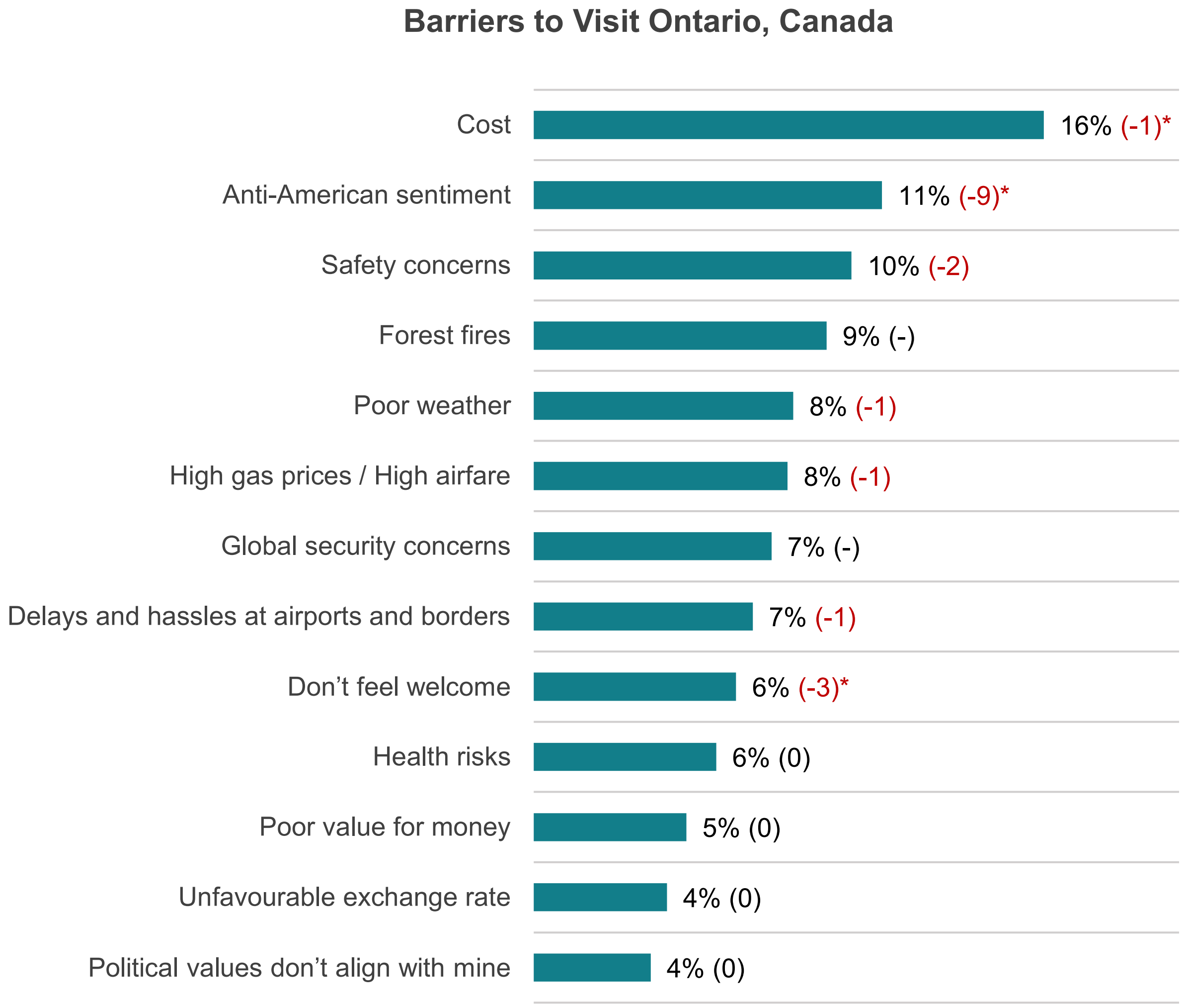
W2B. You mentioned that Canada will be less welcoming to US visitors in a year from now. What factors contribute most to this perception? (Multi-select)

Respondents who said Canada will be Less Welcoming. n=262

TOP RANKED BARRIERS TO VISIT ONTARIO, CANADA

Cost has emerged as the leading potential barrier discouraging US residents from visiting Ontario.

Anti-American sentiment has significantly decreased by 9 points from the previous wave. Other reasons related to US-Canada relationship do not seem to play a major role. These include not feeling welcome, not having aligned political values, and more.



Barriers to Visit Ontario, Canada

		Rank Change	US Drive	US Fly
Cost	16% (-1)*	▲ 1	16% (-3)	16% (+2)
Anti-American sentiment	11% (-9)*	▼ 1	10% (-10)*	12% (-8)*
Safety concerns	10% (-2)	-	9% (-2)	11% (-1)
Forest fires	9% (-)	-	10% (-)	8% (-)
Poor weather	8% (-1)	-	6% (-2)	10% (0)
High gas prices / High airfare	8% (-1)	-	6% (-2)	9% (0)
Global security concerns	7% (-)	-	8% (-)	7% (-)
Delays and hassles at airports and borders	7% (-1)	▼ 1	8% (-1)	6% (-3)
Don’t feel welcome	6% (-3)*	▼ 5	7% (-3)	5% (-4)*
Health risks	6% (0)	▼ 2	7% (+2)	4% (-2)
Poor value for money	5% (0)	▼ 2	6% (+2)	4% (-1)
Unfavourable exchange rate	4% (0)	▼ 2	4% (0)	4% (-1)
Political values don’t align with mine	4% (0)	▼ 2	3% (0)	4% (-1)

**Asterisk indicates significant difference from previous wave*

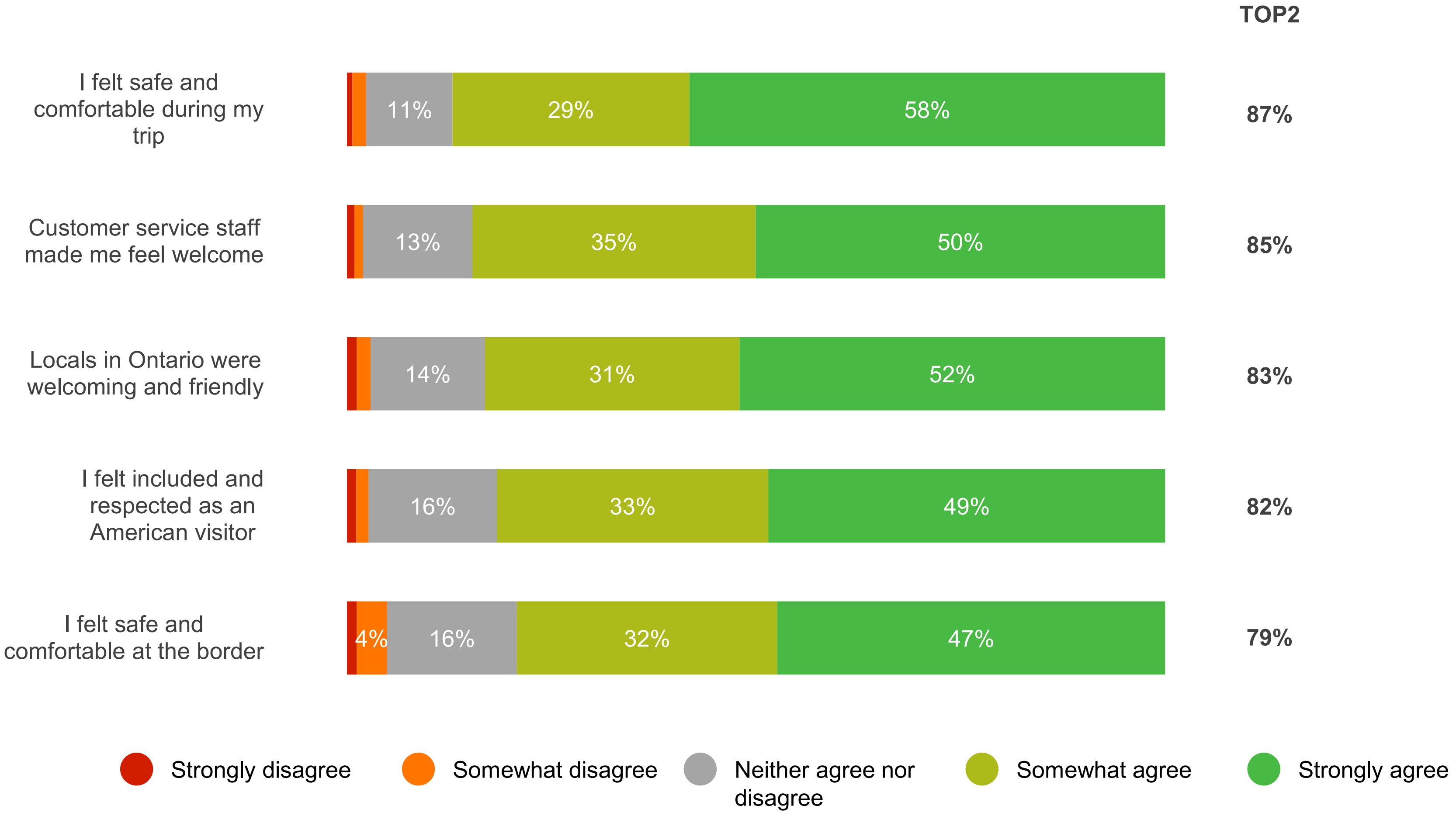
B1. Which of the following factors might discourage you from visiting Ontario, Canada? (Ranking)
All Respondents. n=1622

TRIP SAFETY AND COMFORT

Nine in ten US travellers felt safe and comfortable during their trip to Ontario, and reported that customer service staff made them feel welcomed.

The majority reported feeling comfortable and welcomed across different stages of the trip. This includes the borders, dealing with locals and customer service.

Men and travellers from the US Fly market reported feeling more welcomed than women and those from the US Drive market.



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W3B Thinking about your most recent overnight pleasure trip to Ontario, Canada, how much do you agree or disagree with the following statements (Labels <4% not visualized) (Excludes “Don’t know”)
Those who took an overnight trip to Ontario since Feb 2025. n= 1426

FINANCIAL ASSESSMENT

Overall, US travellers’ ability to spend on pleasure trips has remained unchanged compared to 12 months ago.

Men, younger adults (25–44), BIPOC individuals, those with children, and US Fly market travellers are more likely to report higher ability to spend on leisure travel than other groups.

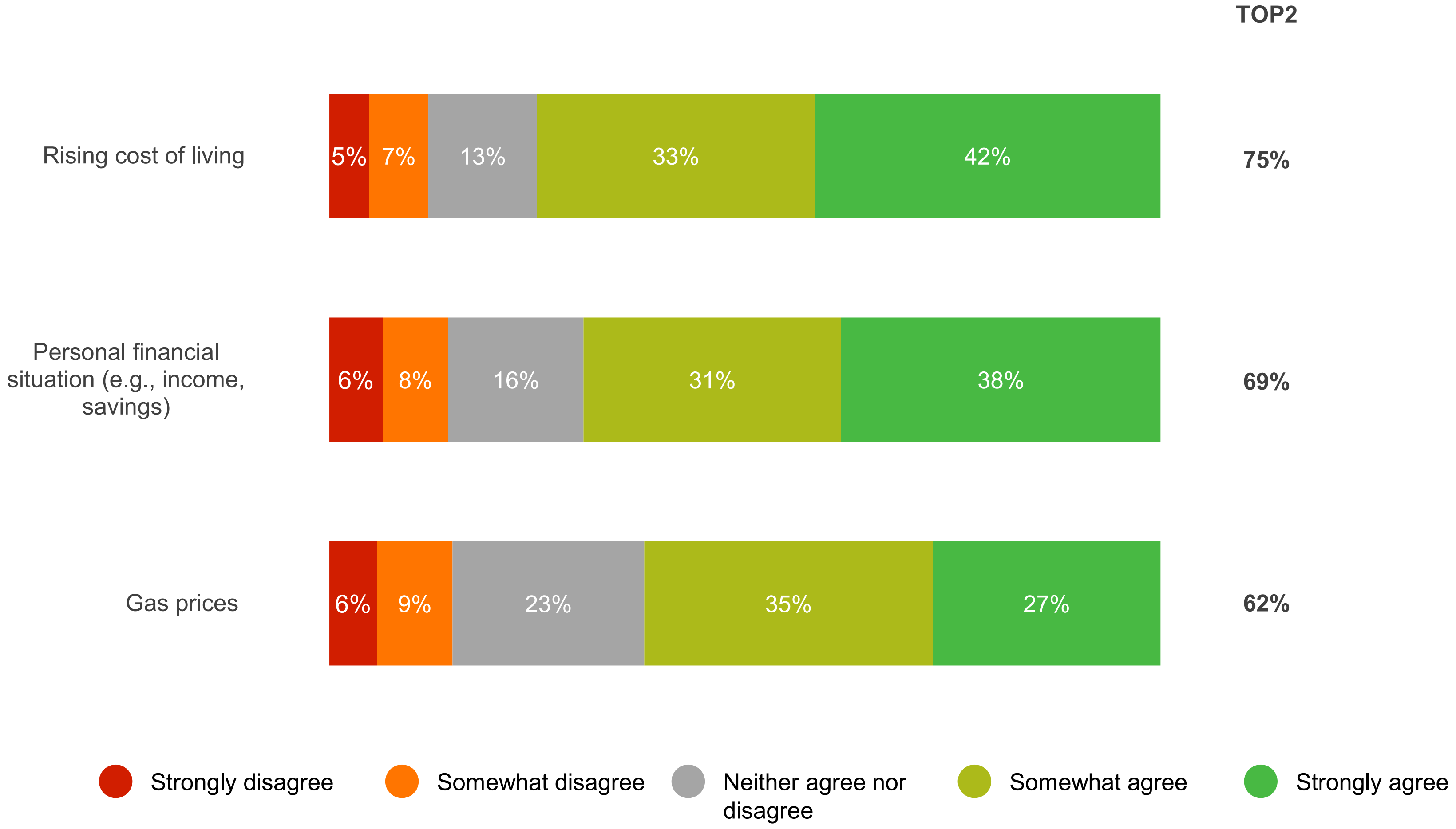
Rising cost of living is the most cited factor impacting travel spending, followed by concerns about personal finances and gas prices. These financial pressures are particularly felt by women and households with children but have minimal impact on households earning above $200K.

FACTORS IMPACTING THE ABILITY TO TAKE PLEASURE TRIPS

Three in four individuals cited the rising cost of living as a factor that impacted their ability to take pleasure trip in the past 12 months.

This was followed by personal financial situation, and gas prices.

These factors seem to have a stronger impact on women and households with children. However, they don't seem to have a significant impact on those with household income above $200K.



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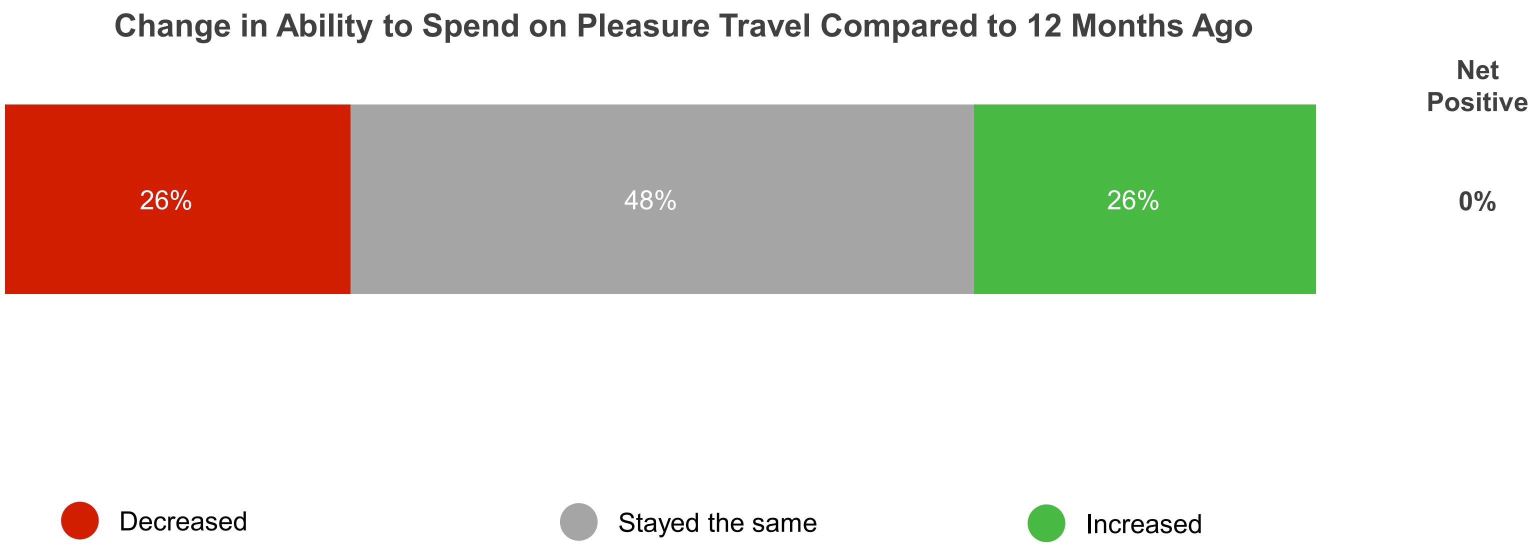
FA2 How much do you agree or disagree that the following factors has affected your ability to take pleasure trips in the past 12 months
(Excludes "Don't know")
All respondents. n=1614

ABILITY TO SPEND ON PLEASURE TRAVEL

US travellers' ability to spend on pleasure trips has not changed compared to 12 months ago.

Men (35%), younger individuals (25-29: 45% and 30-44: 35%), BIPOC (31%), and those with children (35%) reported higher ability to spend.

Additionally, travellers from the US Fly (33%) market reported higher ability to spend on pleasure travel than those from the US Drive market.



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FA1 Compared to 12 months ago, how has your ability to spend on pleasure travel changed?
All respondents. n=1606

TRAVEL PREFERENCES

Almost half anticipate no change to their current domestic and international travel plans. More people have reported taking less trips within and outside the US, in comparison to the previous wave.

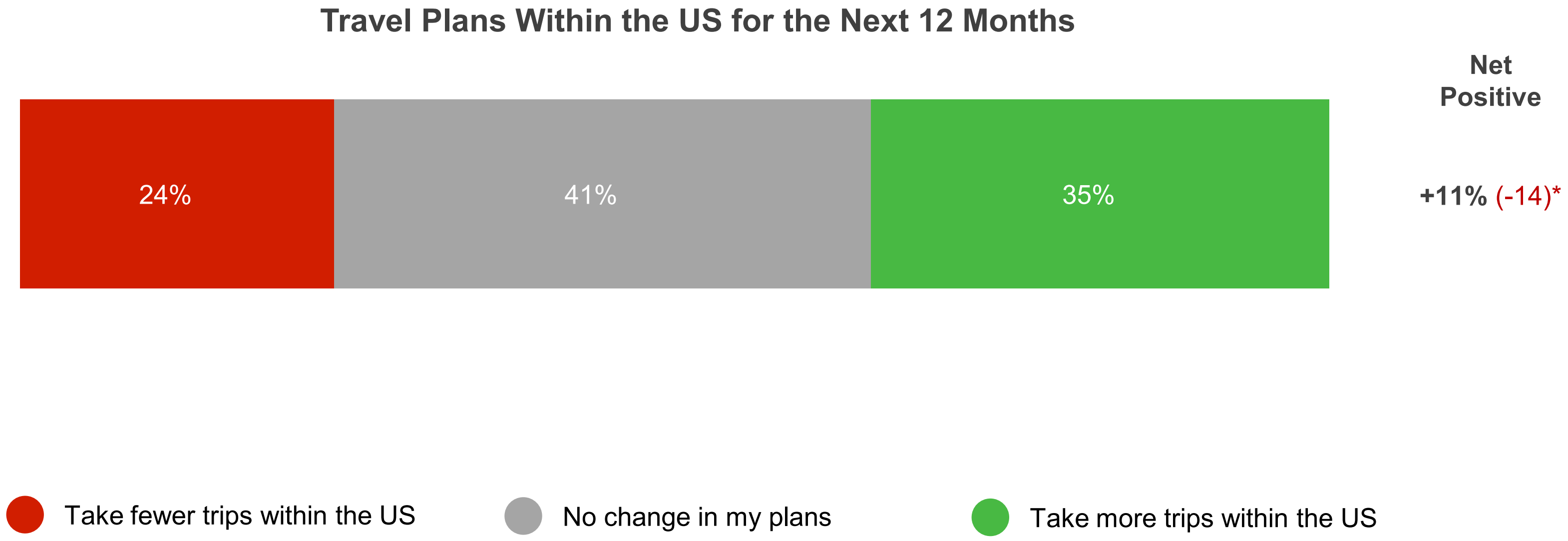
About two-thirds of seasonal trips are booked 1–6 months ahead, with short-term planning more common for summer and fall. Long-term planning is less preferable but is most common among women and Fly market travellers.

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.

DOMESTIC TRAVEL PLANS

While the majority reported unchanged plans when it comes to domestic travels in the next 12 months, respondents reported taking fewer trips within the US than in the previous wave.

However, younger individuals (25-29: 49% and 30-44: 42%), men (42%), travellers from the US Fly market (40%), as well as those with children (41%) are likely to take more domestic trips than their counterparts.



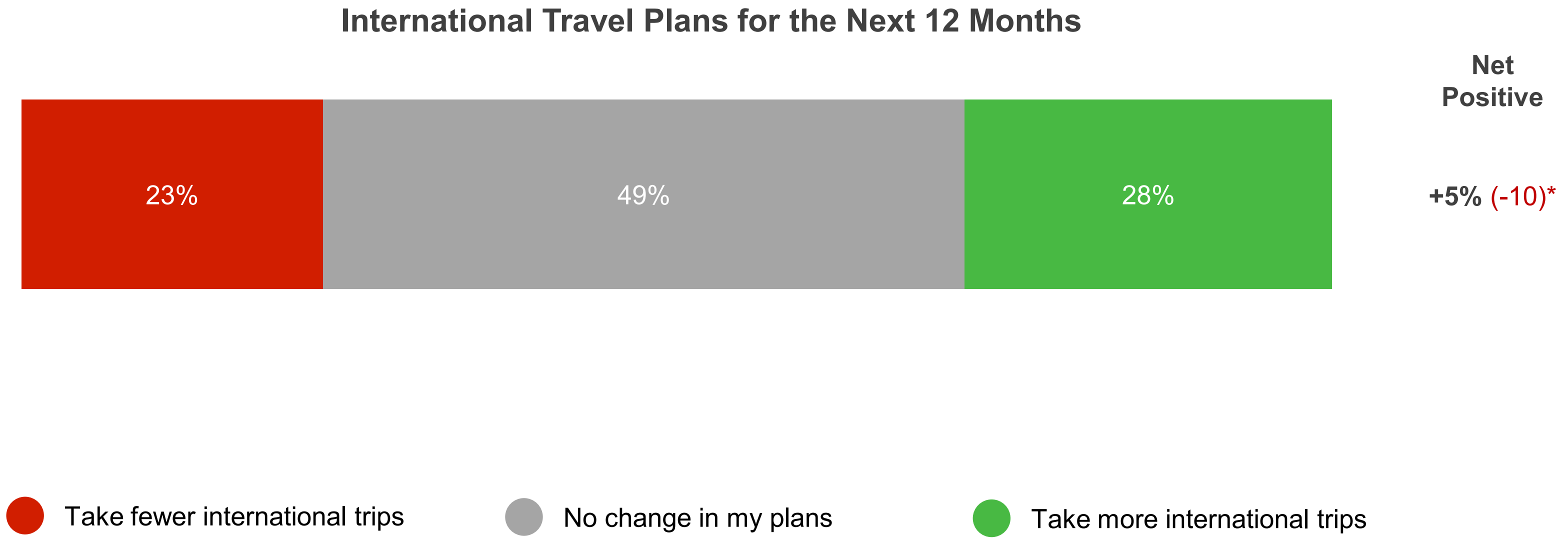
*Asterisk indicates significant difference from previous wave

T1A. Which of the following best describes your domestic travel plans in the next 12 months?
All respondents. n=1622

INTERNATIONAL TRAVEL PLANS

Half of respondents say their international plans have not changed. Overall, there is a slight decline on international travel intent as more people reported taking fewer trips.

However, travellers from the US Fly market (36%) are likely to take more international trips than those from the US Drive market.



*Asterisk indicates significant difference from previous wave

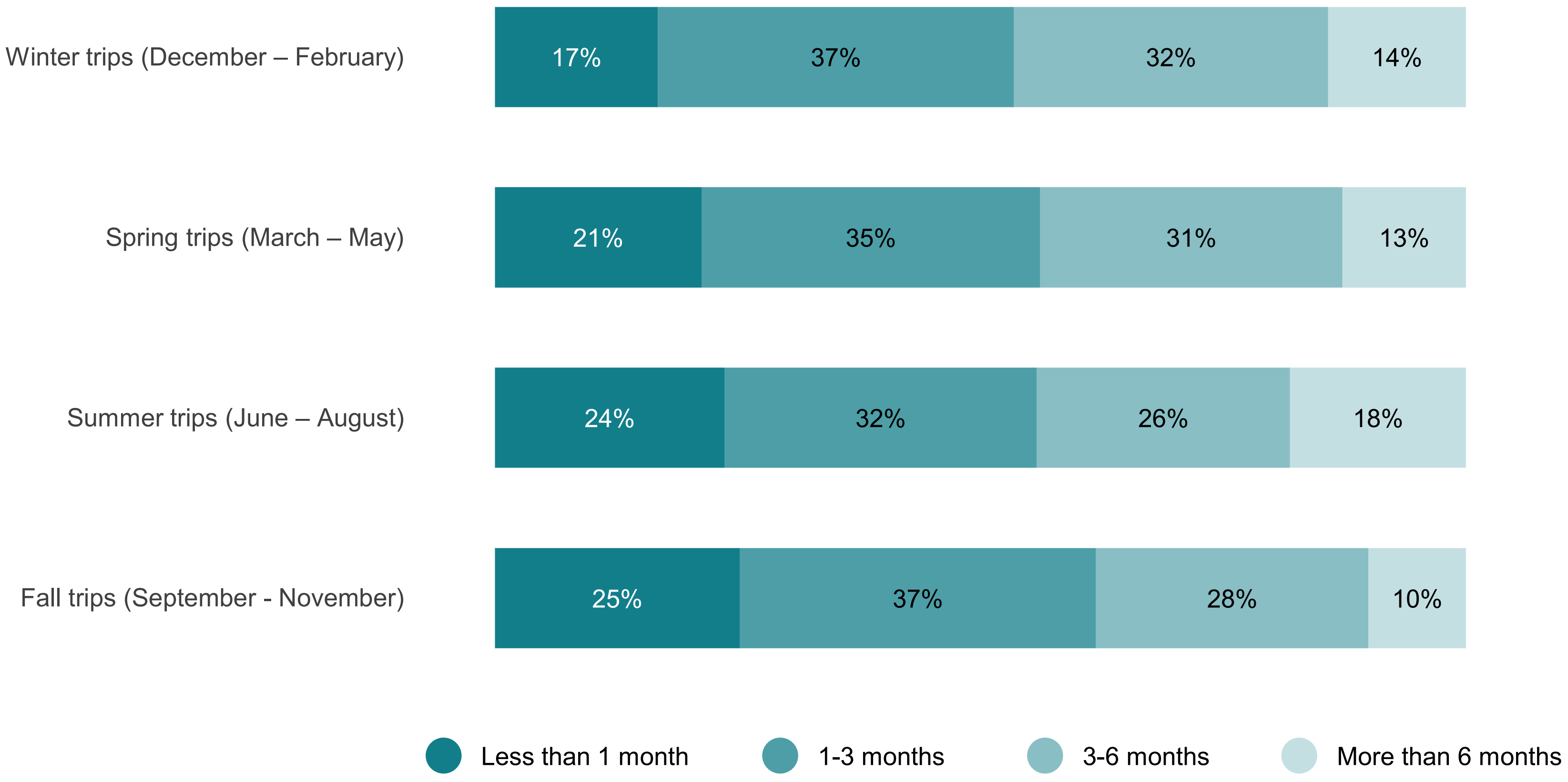
T1B. Which of the following best describes your international travel plans in the next 12 months?
All respondents. n=1622

TRAVEL PLANNING BEHAVIOURS

About one third of all seasonal trips are planned 1-3 or 3-6 months in advance.

Short-term planning (less than 1 month) is more common for summer (24%) and fall (25%) travel, while spring and winter trips are more likely to be booked further in advance.

Only a small minority (10–18%) book more than 6 months ahead, with summer trips most likely to see this longer-term planning at 18%. Women and travellers from the US Fly market are likely to plan more than 6 months in advance.



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T2 For each seasonal trip, how far ahead do you usually make or book your travel plans (Excludes "Don't know")
All respondents. n= 1560

AWARENESS OF ECONOMIC RELATIONSHIP

US residents show strong awareness levels of the favourable exchange rate for travel to Canada. These levels has slightly increased since the previous wave and is significantly higher among the US Fly market compared to the US Drive market, particularly among those from New York City.

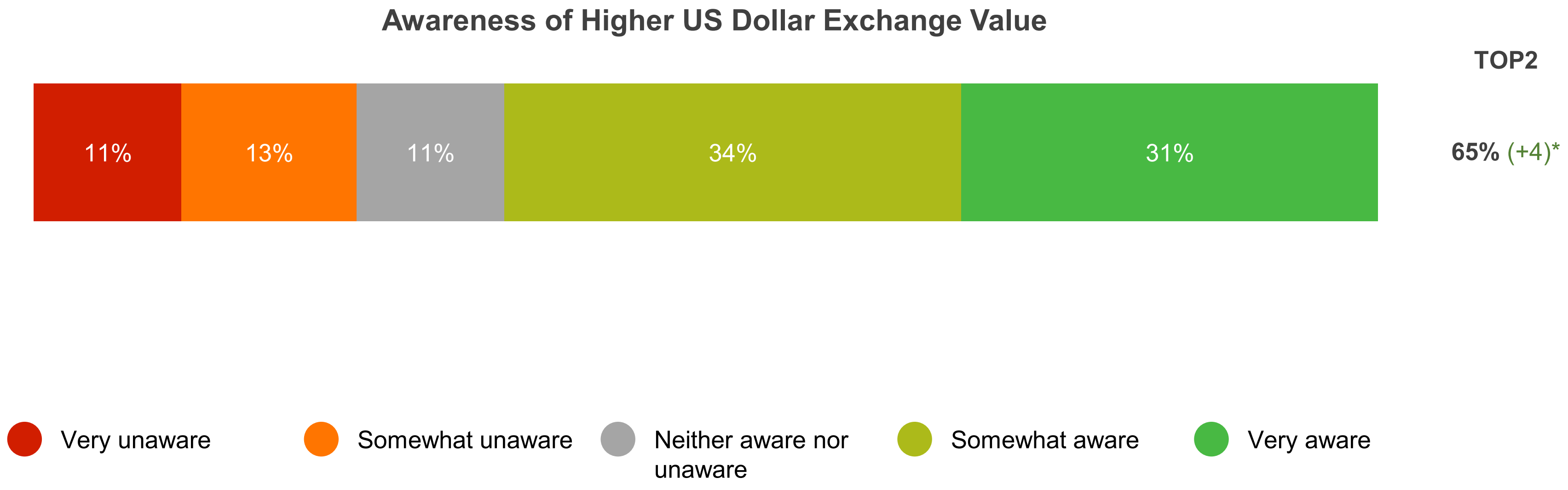
At the same time, almost half of US travellers believe the trade relationship between the US and Canada will worsen. This perception is more common among the US Drive market, while optimism about improvement is stronger among the US Fly market, especially among respondents from New York City.

EXCHANGE RATE AWARENESS

Two in three respondents are aware of the favourable exchange rate for travel to Canada. This metric has slightly increased from the previous wave.

Awareness is significantly higher among the US Fly market (70%) compared to the US Drive market, particularly among respondents from New York City (70%) across all regions.

Higher awareness is also observed among those aged 30-44 (72%), men (75%), individuals with household incomes between $150K–$200K (75%), and with children under 18 (74%).



**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 USD = 1.39 CAD, as of September 25th)? (Excludes “Don’t know”)
All respondents. n=1587

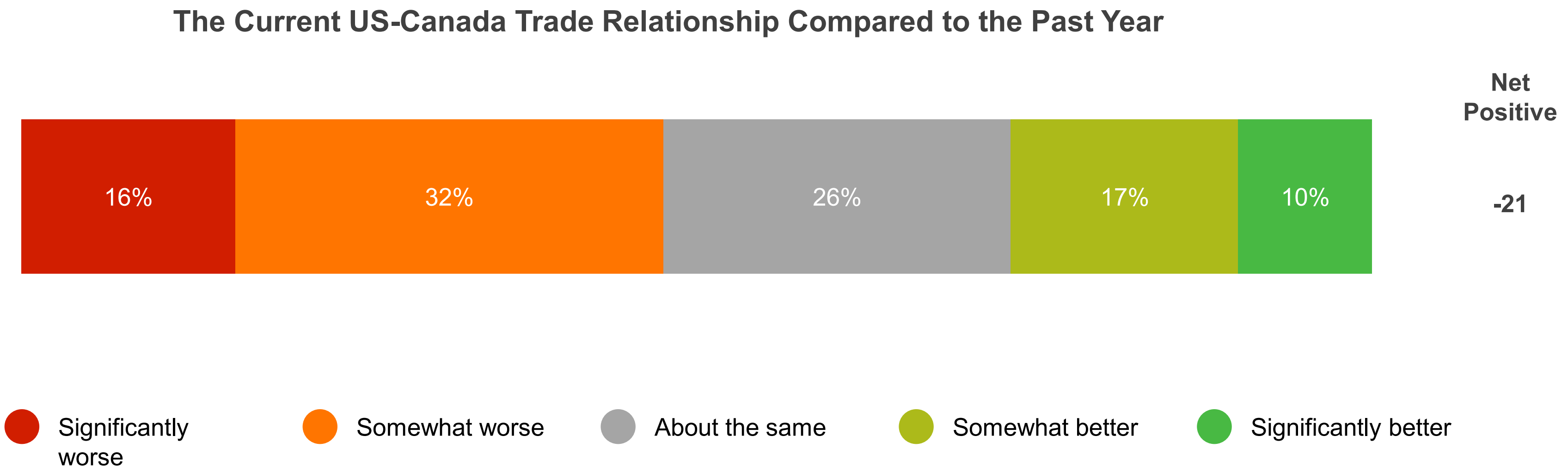
US CANADA TRADE RELATIONSHIP

More US residents believe the current trade relationship between the US and Canada will worsen in the next 12 months.

Those who hold this perception are more likely to be older (ages 55-64: 70%), women (54%), residents of Chicago (57%), and individuals without children under 18 (63%).

Conversely, those who believe the relationship will improve are more likely to belong to the US Fly market (29%) and to reside in New York City (32%).

Optimism about the trade relationship is also higher among younger respondents aged 25-29 (42%) and 30-44 (36%), men (32%), BIPOC respondents (31%), individuals with household incomes between $150K-$200K (36%), and those living with children under 18 (37%).



**Asterisk indicates significant difference from previous wave*

A4. Compared to 12 months ago, how would you describe the current trade relationship between the US and Canada? (Excludes "Don't know")
All respondents. n=1494

IMPACT ON TRAVEL PLANS

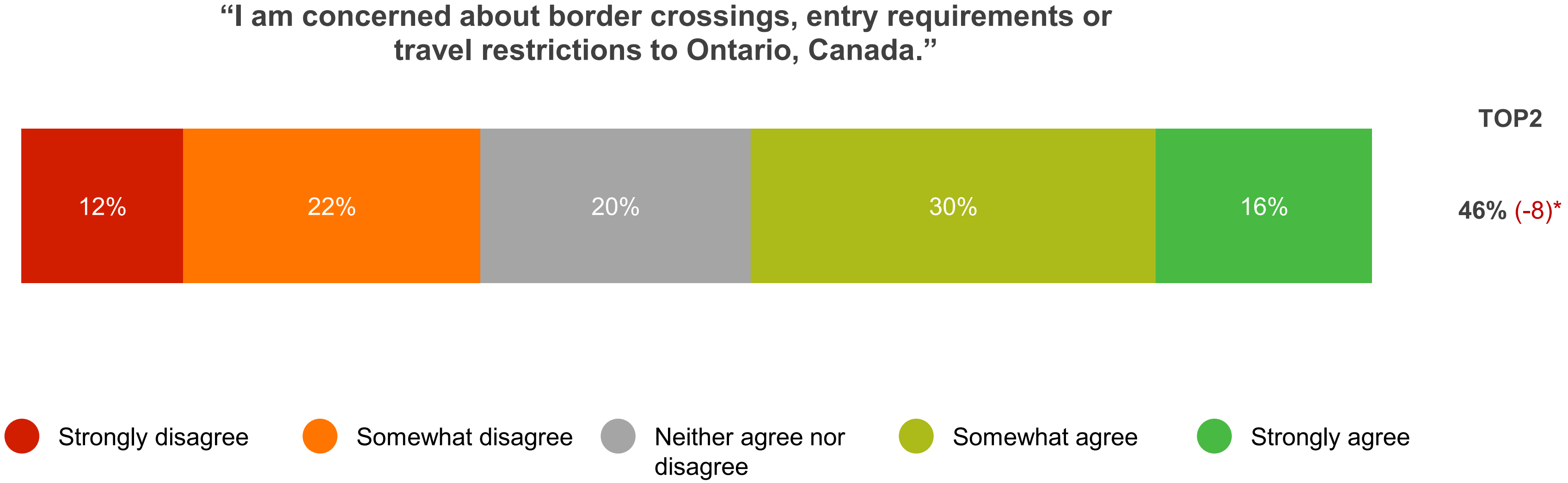
Concerns about border crossings and travel restrictions have declined since the previous wave, though half of US residents remain worried about delays when returning from Canada.

The favourable exchange rate has become a stronger motivator for travel to Ontario, especially among the US Fly market.

Optimism about the US–Canada relationship is also increasing, driven primarily by the US Fly market.

BORDER CROSSING CONCERNS

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

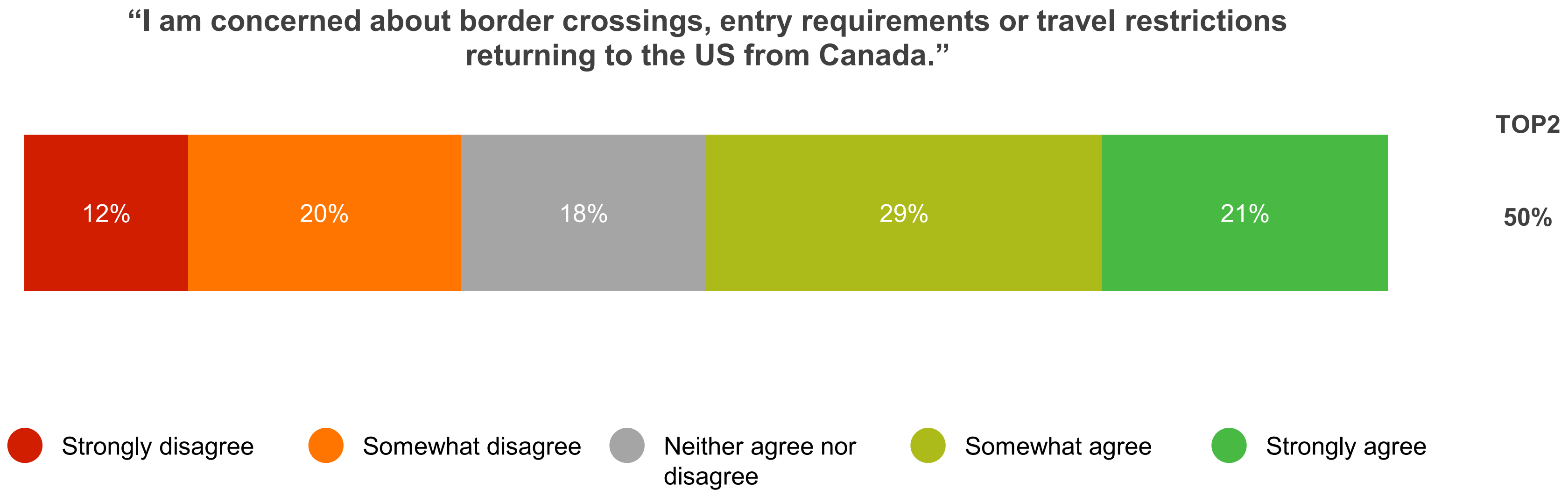


**Asterisk indicates significant difference from previous wave*

I1. 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=1598

RETURN BORDER CROSSING CONCERNS

Half of US residents are showing concern about border crossings, entry requirements, or travel restrictions returning to the US from Canada.



**Asterisk indicates significant difference from previous wave*

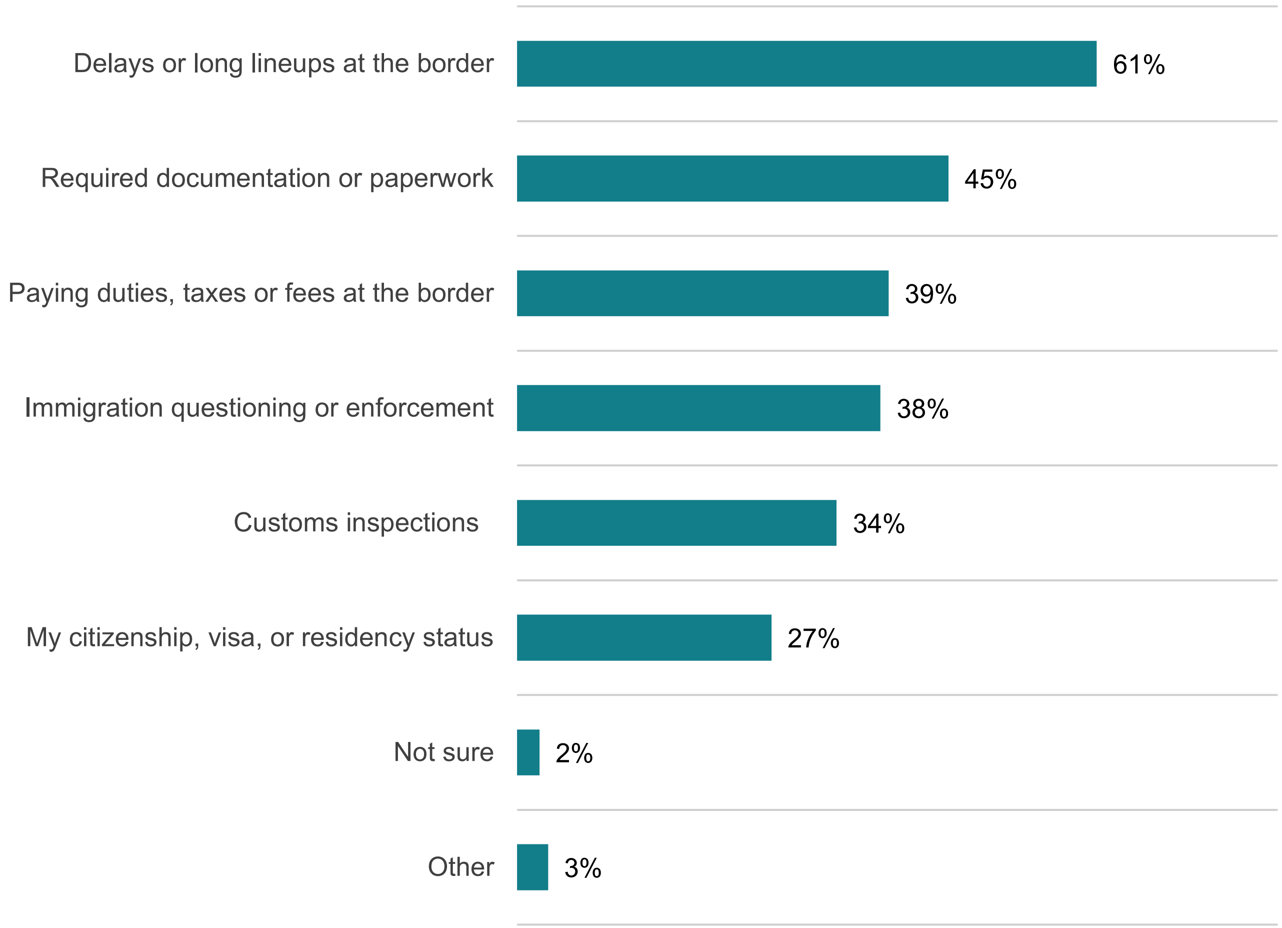
I1A. How much do you agree or disagree with the following statement? "I am concerned about border crossings, entry requirements or travel restrictions returning to the US from Canada." (Excludes "Don't know")
All respondents. n=1597

TOP RANKED CONCERNS RETURNING TO THE US

The top concern when returning to the US is about delays or long lineups at the borders, with three in five travellers expressing this concern.

Those who are worried about the delays or long lineups are more likely to be older (between 55-64) (72%).

Concerns on Returning to the US



	US Drive	US Fly
Delays or long lineups at the border	65%	57%
Required documentation or paperwork	47%	44%
Paying duties, taxes or fees at the border	36%	42%
Immigration questioning or enforcement	35%	42%
Customs inspections	31%	36%
My citizenship, visa, or residency status	24%	30%
Not sure	3%	2%
Other	4%	2%

**Asterisk indicates significant difference from previous wave*

I1B. You mentioned that are concerned about returning to the US from Canada. Which of the following, if any, describe your concerns? (Multi-Select)
Respondents who are concerned with border issues. n=780

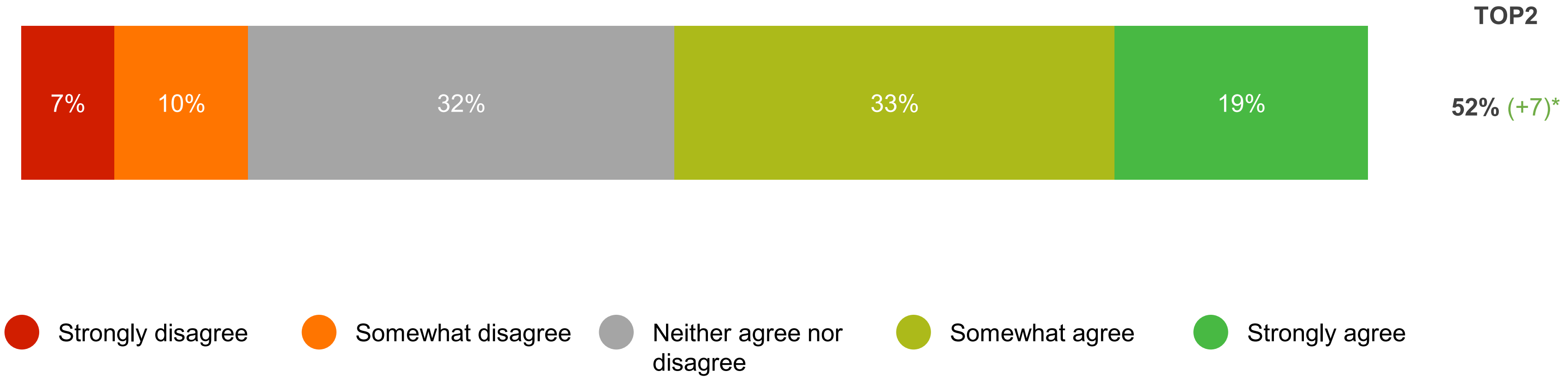
FAVOURABLE EXCHANGE RATE

The favourable exchange rate has become a major motivator for visiting Ontario, with half of respondents citing it as a key driver. This figure has significantly increased from the previous wave.

Residents from the US Fly market (58%) are significantly more likely than those from the US Drive market to travel to Ontario because of the favourable exchange rate, particularly New York City residents (60%).

This motivation is also stronger among respondents aged 30-44 (62%), men (60%), individuals with household incomes between $150K-$200K (62%), and with children under 18 (62%).

"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*

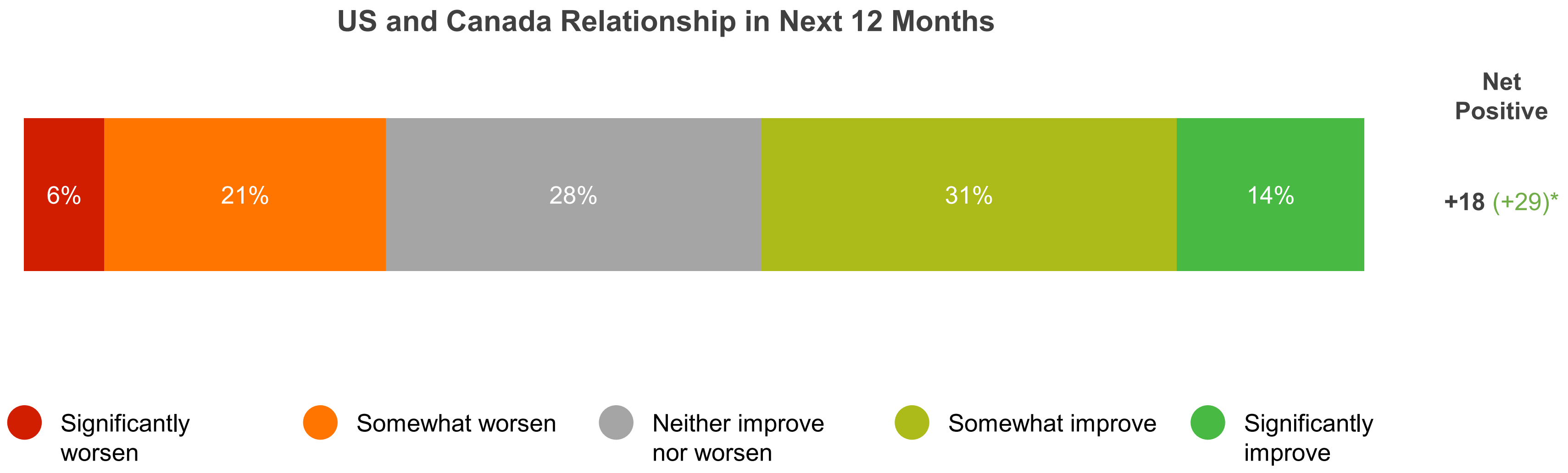
I2. How much do you agree or disagree with the following statement? "I am more likely to travel to Ontario, Canada in the next 12 months because of the favourable exchange rate." (Excludes "Don't know")
All respondents. n=1574

US CANADA RELATIONSHIP

An increasing number of US residents now believe that the relationship between the US and Canada will improve over the next 12 months. Confidence in this outlook has grown significantly since the previous wave.

Those who believe the relationship will improve are more likely to be from the US Fly market (51%) and from New York City (54%) across all regions.

Optimism is also higher among younger respondents (25-29: 58% and 30-44:54%), men (55%), individuals with household incomes of $100K-$150K (49%) and $150K-$200K (57%), and with children under 18 (56%).



*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=1512

Toronto

FIFA 2026 WORLD CUP

Half of US residents are aware that Toronto will be one of the host cities for the FIFA 2026 World Cup. Awareness is notably higher among the US Fly market, particularly respondents from New York City.

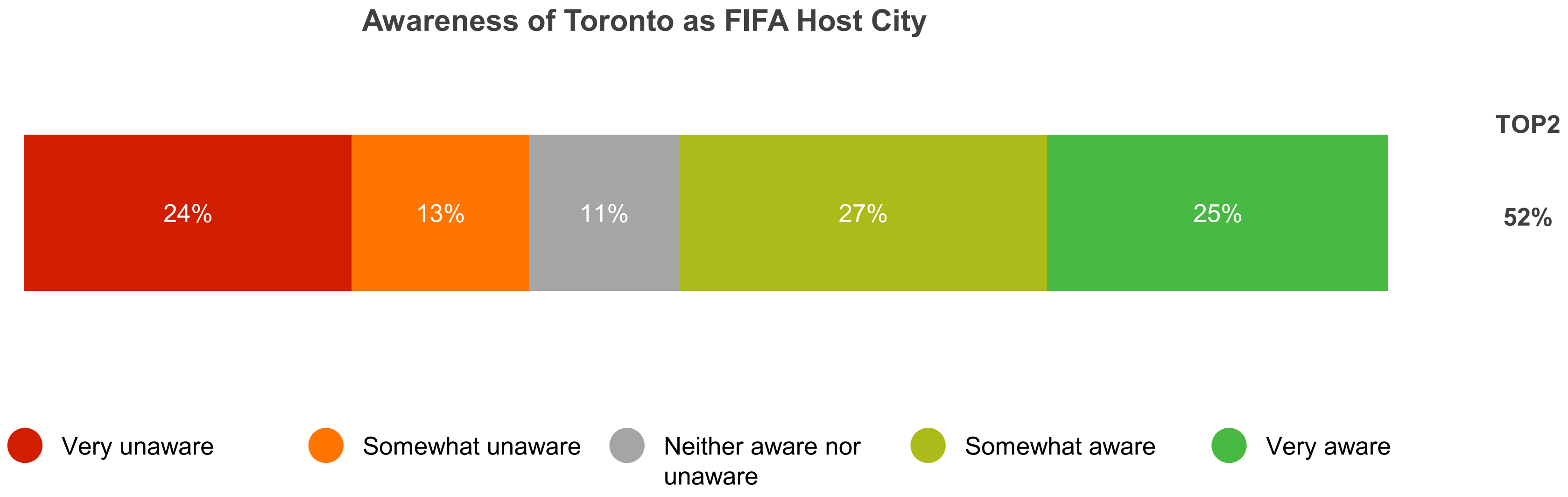
Two in five US residents say they are likely to visit Toronto because it is hosting FIFA 2026. The likelihood of visiting is significantly higher among the US Fly market compared to the US Drive market, with New York City residents showing the strongest intent to travel for the event.

FIFA 2026 WORLD CUP AWARENESS

Half of US residents were already aware of Toronto, Canada being one of the host cities for the FIFA 2026 World Cup.

Respondents who are aware of FIFA 2026 coming to Toronto are more likely to be from the US Fly market (62%) and from New York City (64%) compared to other regions.

Awareness is also higher among those aged 30–44 (62%), men (64%), individuals with household incomes of $100K–$150K (60%) and $150K–$200K (65%), and parents with children under 18 (63%).



**Asterisk indicates significant difference from previous wave*

F1. Before today, how aware are you that Toronto, Canada is one of the official host cities for the FIFA 2026 World Cup? (Excludes "Don't know")
All respondents. n=1588

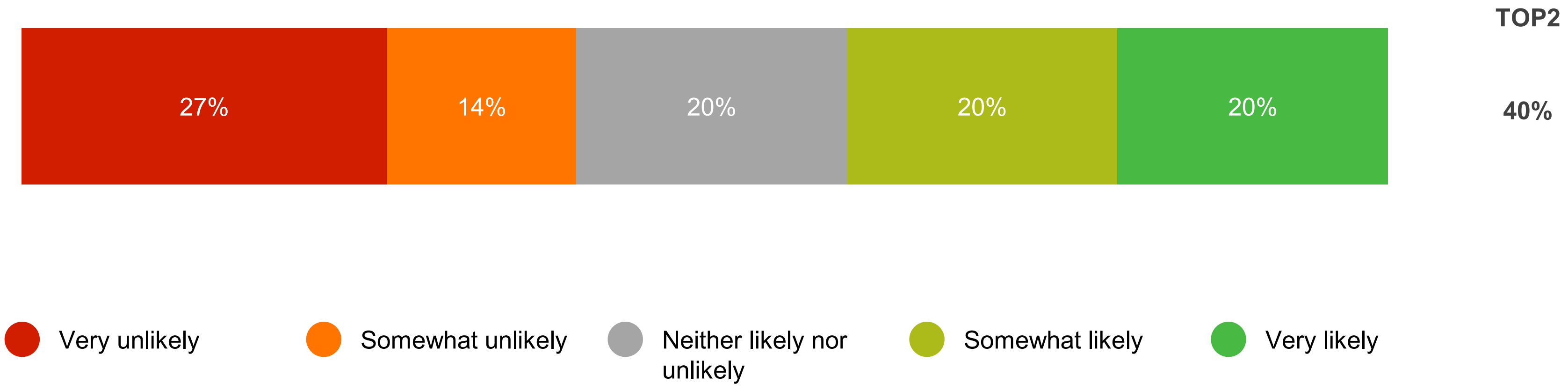
TORONTO TRAVEL INSTEREST DUE TO 2026 FIFA WORLD CUP

Two in five US residents are likely to visit Toronto because it is hosting the FIFA 2026 World Cup.

The US Fly market (49%) is significantly more likely to visit Toronto for the FIFA World Cup compared to the US Drive market. Across all regions, respondents from New York City (53%) are the most likely to visit.

Those who are likely to visit tend to be younger (ages 25-29: 53%; 30-44: 54%), men (52%), BIPOC respondents (50%), individuals with household incomes of $100K–$150K (45%) and $150K-$200K (51%), and parents with children under 18 (55%).

Likelihood on Visiting Toronto for the 2026 FIFA World cup



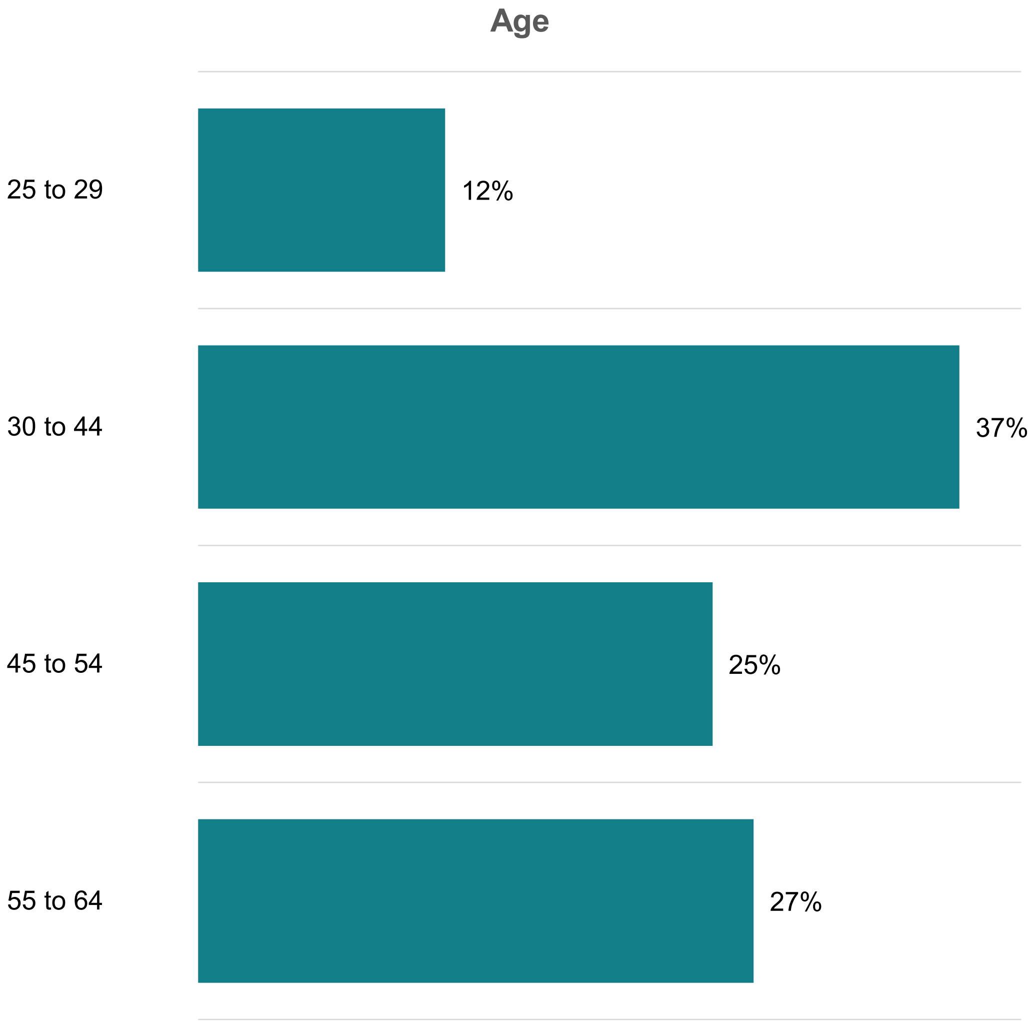
**Asterisk indicates significant difference from previous wave*

F2. How likely are you to visit Toronto, Canada because it's hosting the 2026 FIFA World Cup? (Excludes "Don't know")
All respondents. n=1593


Kawartha Lakes

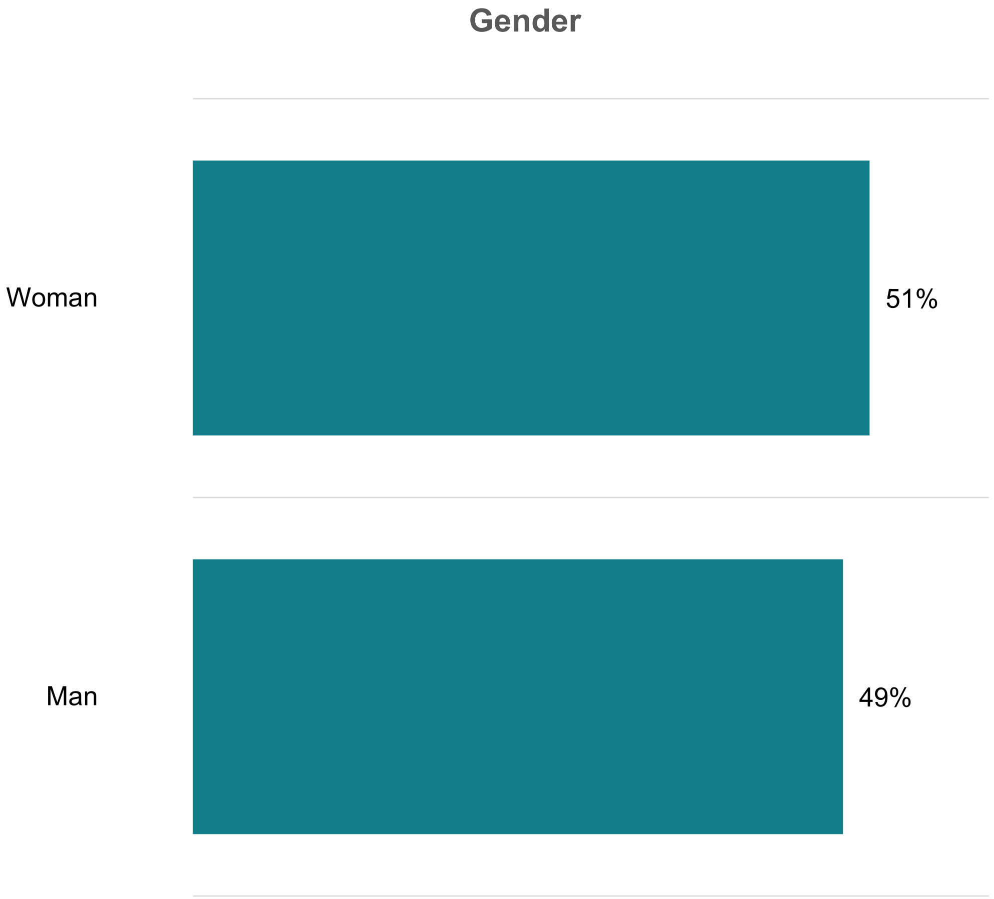
DEMOGRAPHICS

RESPONDENT PROFILE



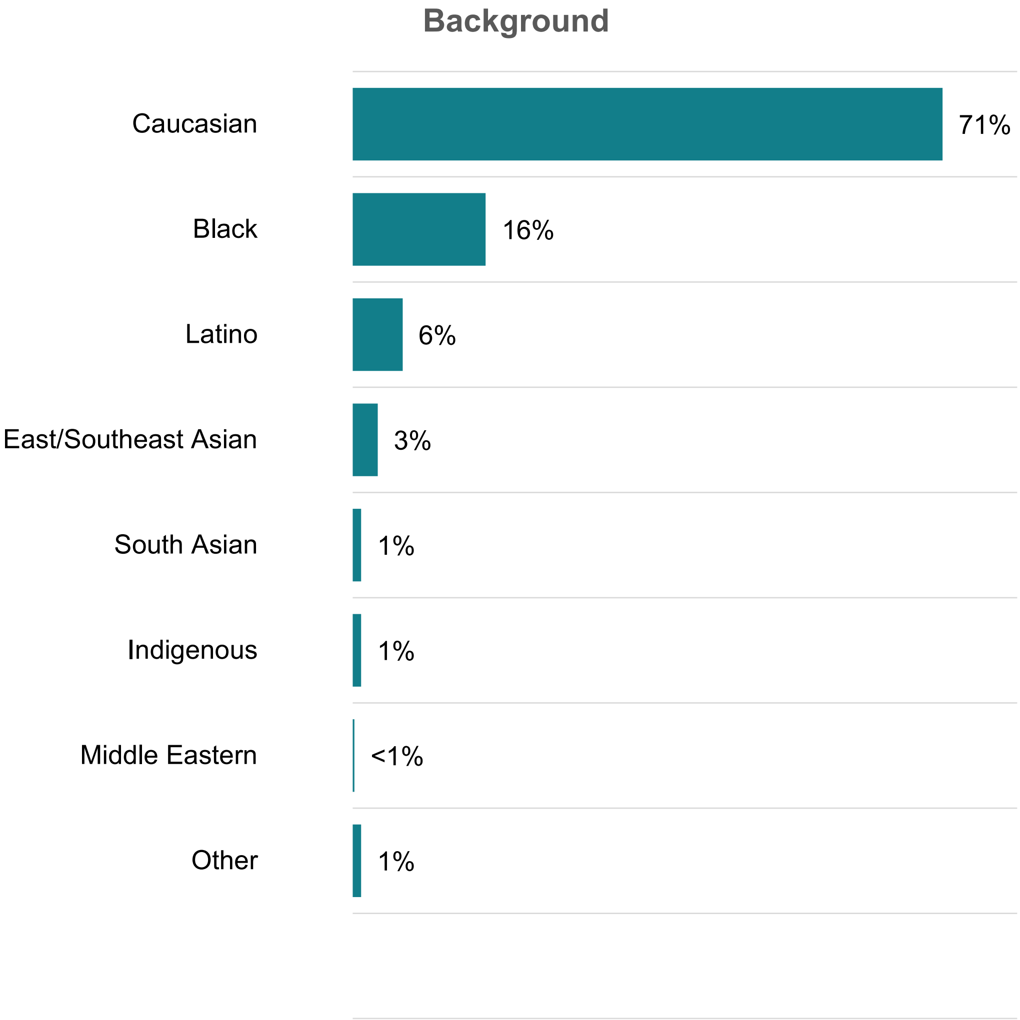
SC1. Which category below includes your age: (Single-select)
All respondents. n=1622

RESPONDENT PROFILE



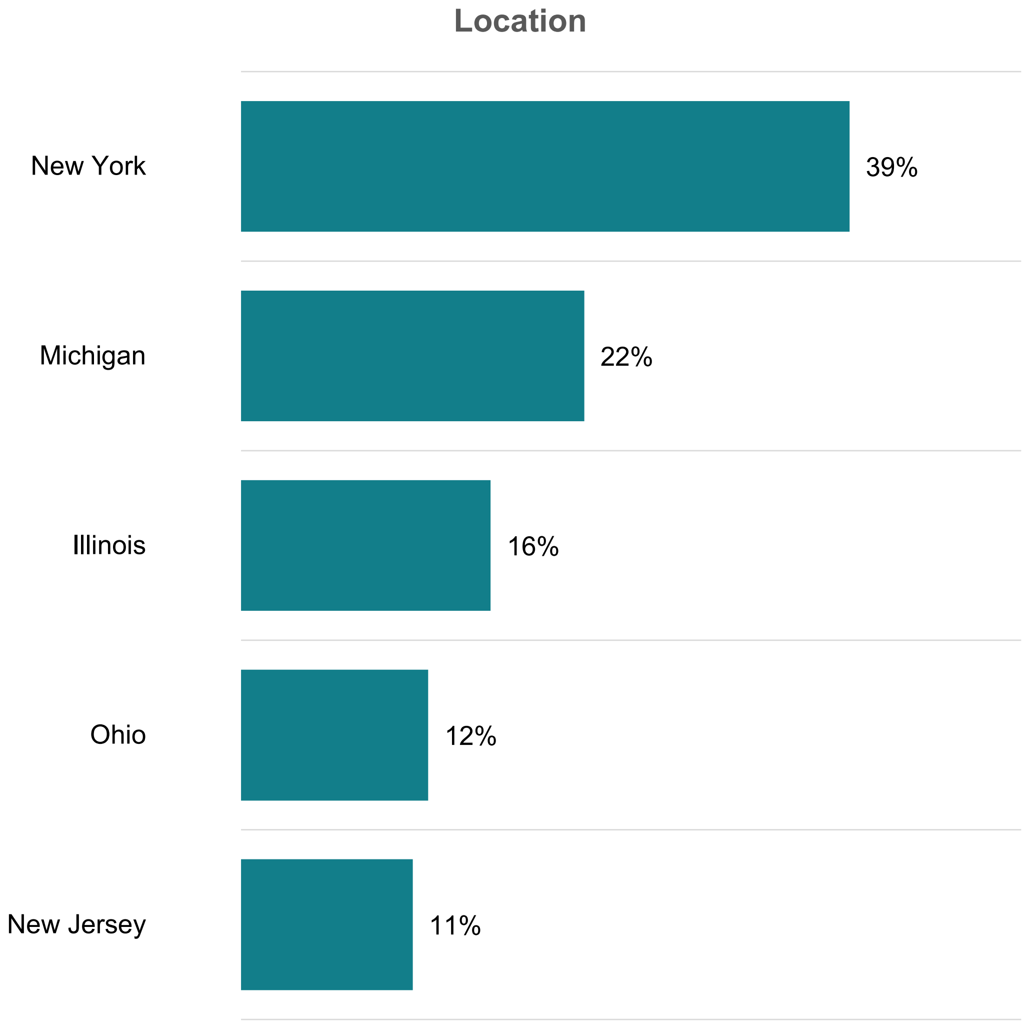
SC2 What best describes your gender identity? (Single-select)
All respondents. n=1621

RESPONDENT PROFILE



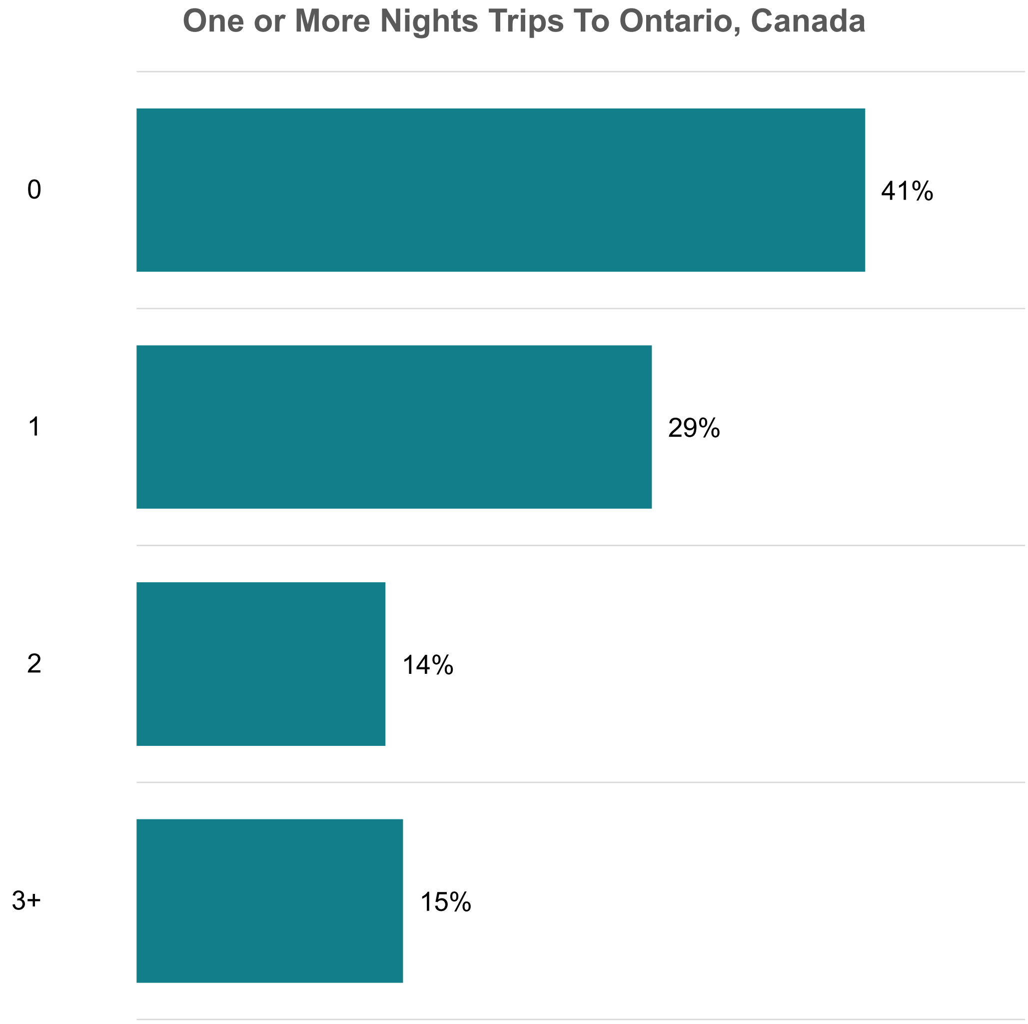
SC3 While most people in the United States view themselves as American, many have different ethnic or cultural origins or family backgrounds. With this in mind, please indicate which of these best describes your ethnic or cultural background:(Single-select)
All respondents. n=1622

RESPONDENT PROFILE



SC4 Which of the following states do you live in? (Single-select)
All respondents. n=1622

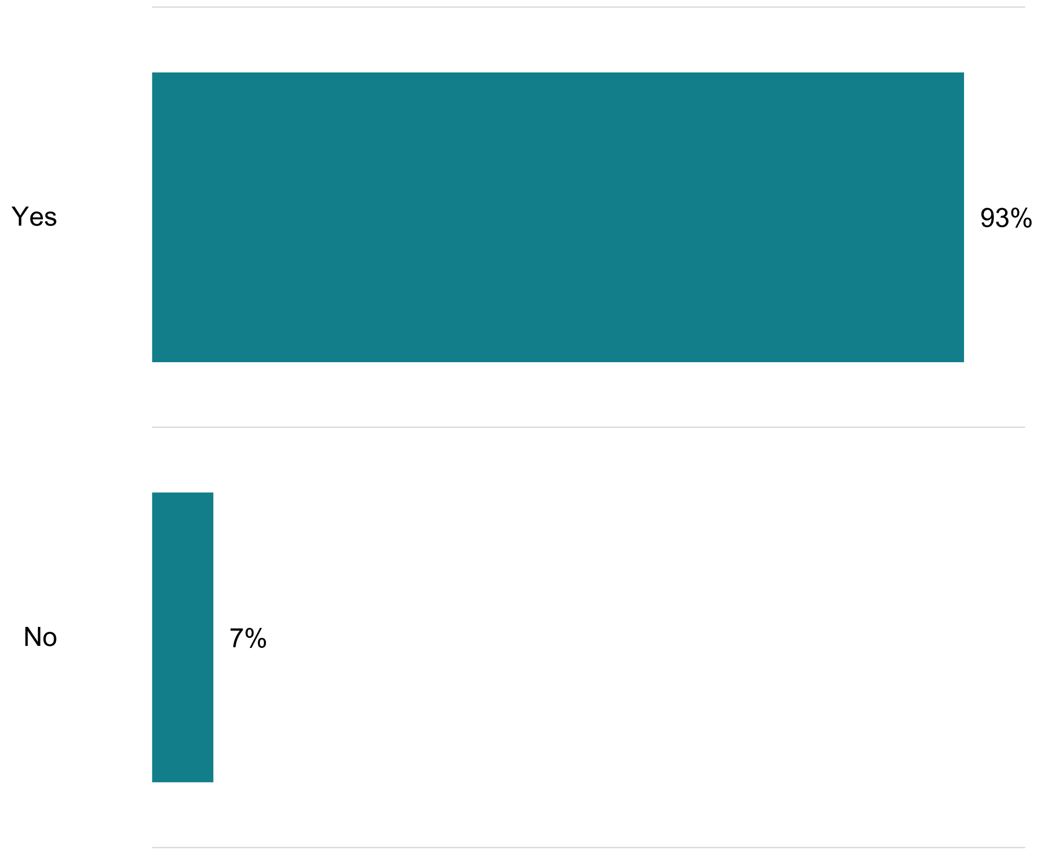
RESPONDENT PROFILE



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=1622

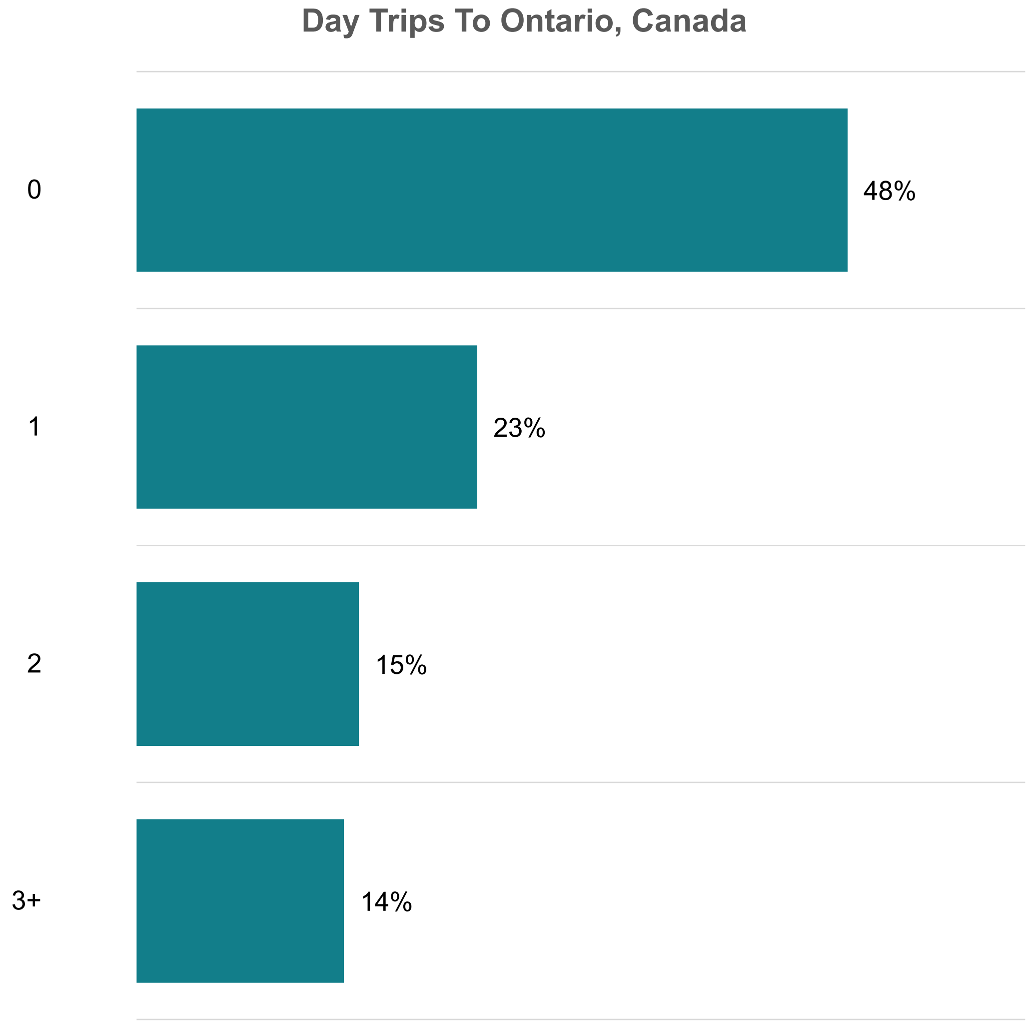
RESPONDENT PROFILE

Pleasure Trips In Past 2 Years



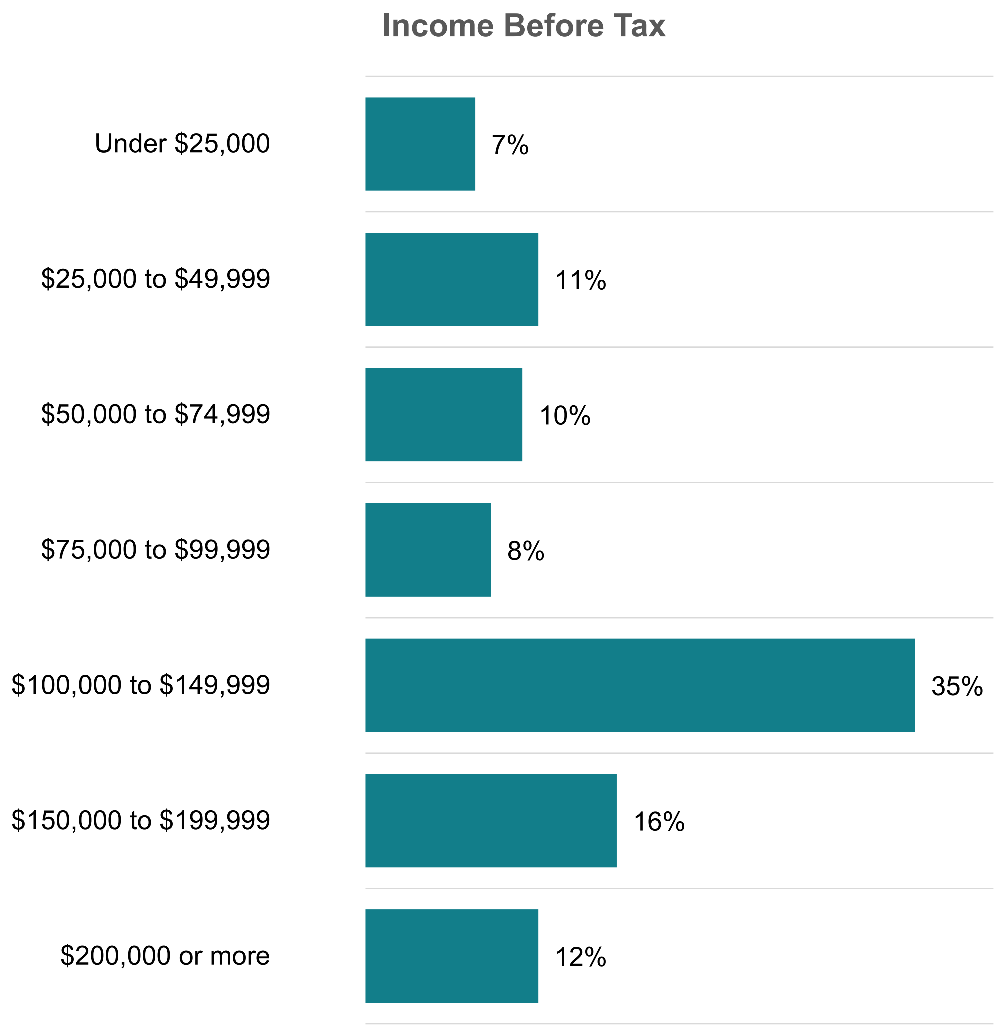
SC9 Have you taken a pleasure trip of one or more nights away from home anywhere in the past 2 years? (Single-select)
All respondents. n=1622

RESPONDENT PROFILE



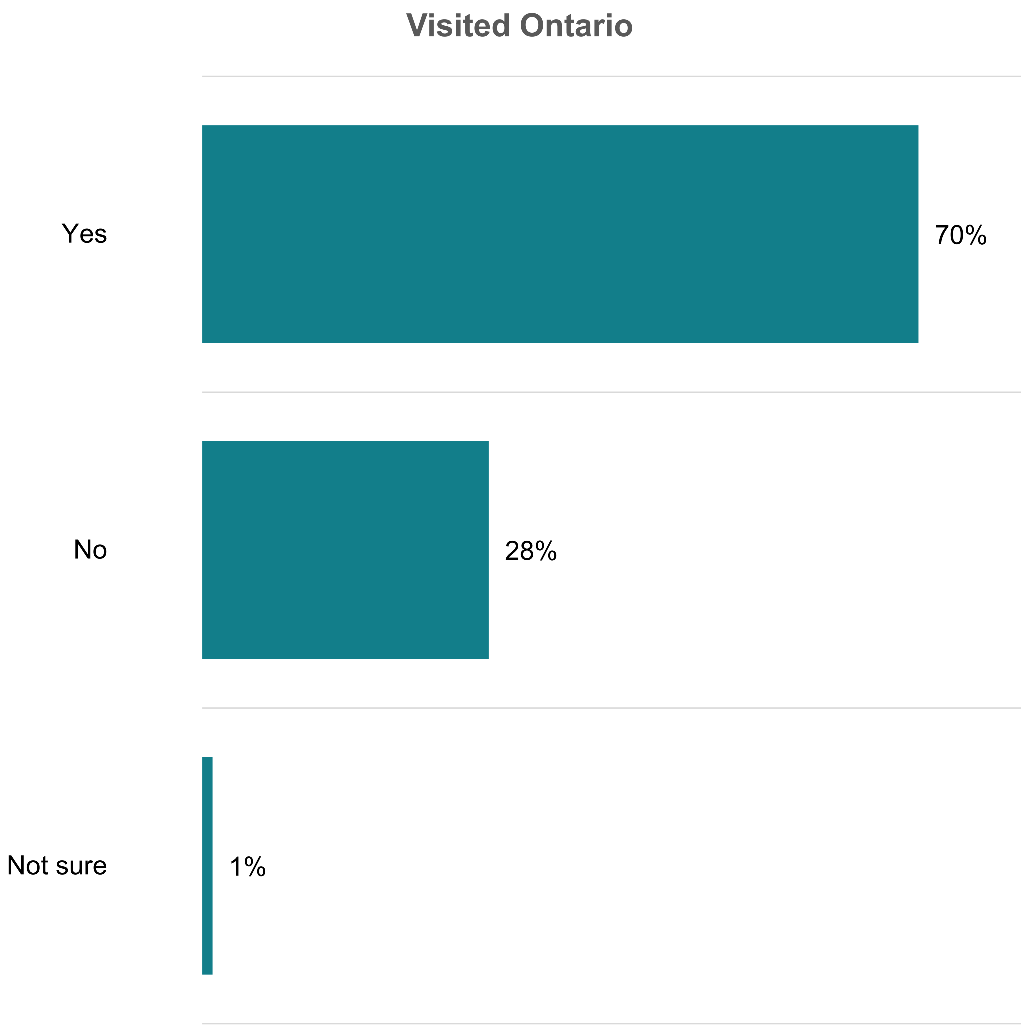
SC10 In the next 12 months, how many day trips are you planning to take to Ontario, Canada? (If 'None', type in '0') (Open ended)
All respondents. n=812

RESPONDENT PROFILE



SC11 Which of the following best describes your household’s total annual income before taxes? (Single-select)
All respondents. n=1622

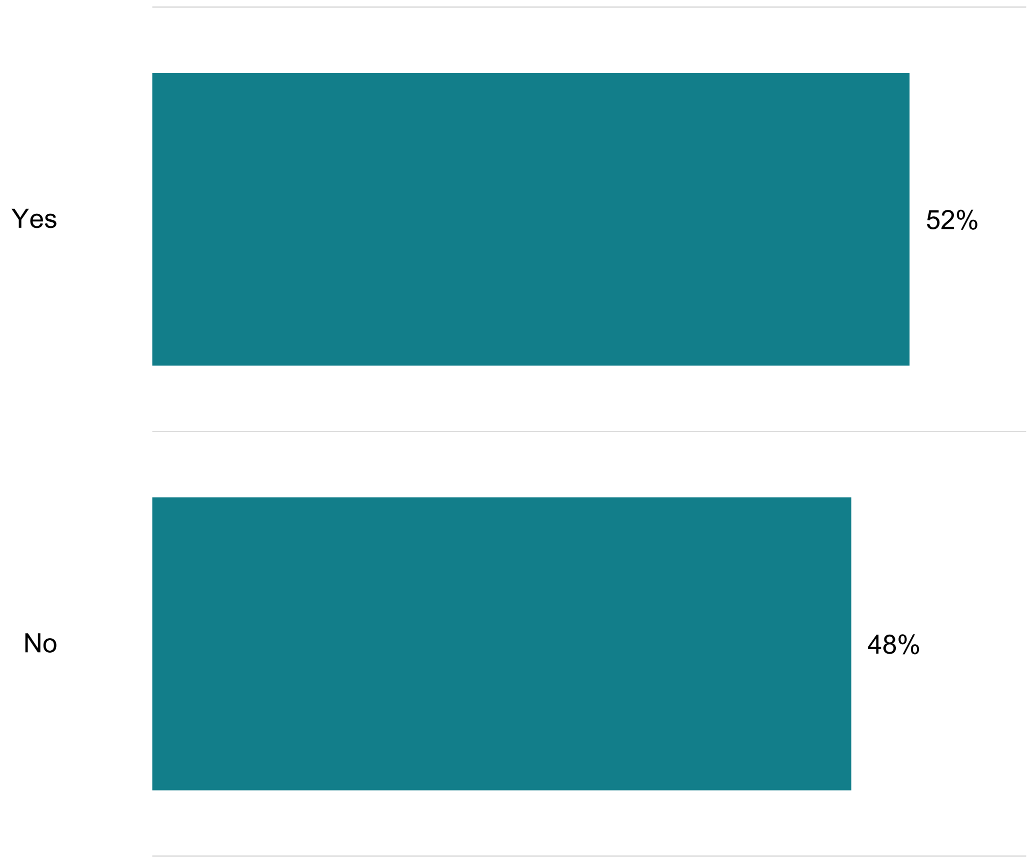
RESPONDENT PROFILE



D1 Have you visited Ontario, Canada before? (Single-select)
All respondents. n=1622

RESPONDENT PROFILE

Children In Household



D2 Do you have any children under 18 years old? (Single-select)
All respondents. n=1622