



CONTEXT IS EVERYTHING

US PULSE SURVEY

Prepared for: Destination Ontario

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Alex Mazanik, CAIP

amazonik@crg.ca

(416) 820-7026

William Schatten, CAIP

wschatten@crg.ca

(416) 388-9455

50 Carroll Street, Toronto, Ontario

www.crg.ca



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CONTEXT IS EVERYTHING



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
- Uses social media platforms/website at least once a week
- Planning to take a trip of at least 4 nights outside of the country in the next 2 years or have taken a trip of at least 4 nights outside of the country in the past 2 years

Sample Size:

- Total: 1,610
- US Drive: 808
- US Fly: 802

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:

- January 27th – January 31st, 2025

Average Length of Interview:

- 10.1 minutes



CONTEXTUAL TIMELINE

January 27 – 31, 2025

Pulse Study Fieldwork: Wave 1



March 24 – 28, 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.



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.

EXECUTIVE SUMMARY



📍 Southampton (RT07)

Impact of Political Events on Destination and Brand Perception

Despite the high levels of awareness of the recent U.S. political developments, such as the suggestion of Canada becoming the 51st state and the imposition of tariffs, these events have had **minimal impact on Ontario's destination and brand perception**. Key perception metrics remain stable when compared to recent 2024 data, indicating that political news has not significantly altered how Ontario is viewed. This holds true for both the US Drive and US Fly markets. *(Slides 22-24)*

Canada continues to be perceived as a **welcoming destination**, ranking higher than many other top international travel destinations. Looking ahead, most Americans believe Canada will remain just as welcoming—or even more so—in the coming year. This positive outlook is largely driven by perceptions of Canada as a safe, secure destination, with easy border crossings and friendly locals, which enhances its appeal among travellers. *(Slides 27-28)*

Impact of Political Events on Travel Plans

There appears to be no noticeable change in respondents' travel plans—whether within their own country or internationally—due to recent political events. Half of respondents indicate that their **travel plans in the next year will remain unaffected**. *(Slides 32-33)*

In addition, neither the results of the US Presidential election nor any political news about Canada has had a significant impact on the travel intentions of respondents for the next 12 months – with three quarters saying their plans have not changed. Even among those who are aware of recent political developments, a significant portion still plans to travel to Ontario in the next year. *(Slides 41-42)*

The Key Driver Analysis further revealed that political beliefs do not have much of an influence on the US Drive market, indicating that convenience (e.g., travelling through borders with ease) and cost are the primary drivers for these travellers. However, for the US Fly market, political alignment does play a role—potentially due to these travellers residing in urban areas, having higher incomes, and being more politically engaged. However, economic factors, such as the perceived value and affordability of travel to Ontario, remain the strongest drivers of travel intent. Notably, a favourable exchange rate further reinforces Ontario's appeal, ultimately outweighing political considerations in travellers' decision-making. *(Slides 12-15)*

Potential Barriers

When asked why they believe Canada may not be as welcoming in the future, respondents cited **US-Canada political tensions and anti-American sentiment** as primary concerns, particularly among the US Fly market. Also, when asked to rank factors that would discourage them to visit, safety concerns and anti-American sentiment emerged among the top four deterrents.

Cost is the largest potential deterrent for US visitors to travel to Ontario signifying the value-centric perception of Ontario. While the Fly market is concerned with weather, the Drive market is more concerned with delays and hassles at border crossings.

(Slides 16-19, 29, 30)

Opportunities for Messaging

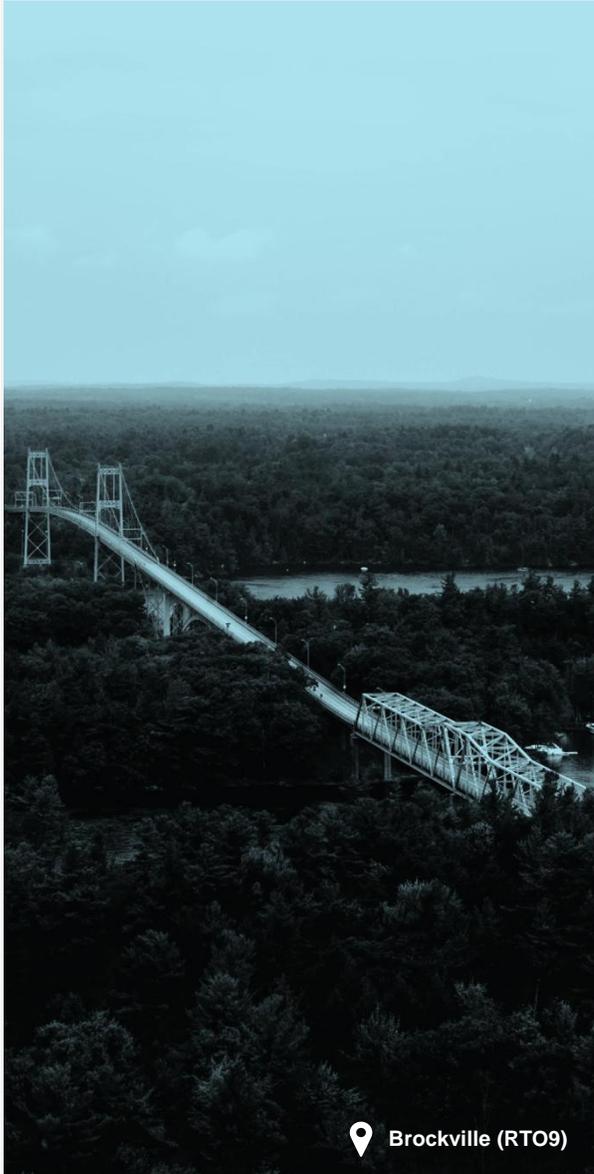
For the US Drive market, it is essential to highlight the **ease and convenience of visiting Ontario**. Many of these travellers prefer short, flexible trips, often planned on short notice, making a smooth border-crossing experience a crucial factor in their decision. Marketing efforts should address and dispel concerns about border hassles, emphasizing that entry requirements are straightforward and hassle-free. Messaging should position Ontario as an easy and accessible getaway destination, perfect for weekend trips, family outings, and spontaneous visits.

For the US Fly market, marketing efforts should focus on Ontario's **welcoming and inclusive atmosphere**, reinforcing that visitors from the US are valued and appreciated. Since these travellers are more likely to come from large urban centers and have a higher degree of political and social engagement, messaging should emphasize Ontario's diverse communities, cultural vibrancy, and openness to international visitors. Promoting Ontario as a destination where Americans have always been welcomed—and continue to be—can help reassure and attract this market.

Cost is the top priority for travellers when deciding whether to visit Ontario. The Key Driver Analysis further revealed that **exchange rates are the strongest driver of travel intent**, reinforcing the significance of affordability in decision-making. *(Slides 12, 30)*

Ensuring Ontario remains perceived as a **high-value destination** is critical to maintaining and growing visitation. Additionally, reducing perceived travel barriers for short-haul visitors and reinforcing Ontario's welcoming nature for long-haul travellers will help maximize appeal across different US markets.

KEY DRIVER ANALYSIS



 Brockville (RTO9)



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 #1

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.

The analysis revealed that having a **favourable exchange rate is the single most influential factor** in determining US residents' likelihood to visit Ontario. This factor was found to be at least four times more impactful than any of the other 11 variables, reinforcing that affordability plays a crucial role in decision-making.

In general, political alignment was not a major contributor relative to economic considerations, suggesting that travellers may be willing to overlook political differences if they perceive Ontario as offering strong value for their money. This insight highlights the importance of reinforcing Ontario's affordability and value in future destination marketing efforts.

Key Driver Analysis #2

To further understand what other factors drive travel intent beyond affordability, we conducted a second Key Driver Analysis excluding the exchange rate variable. This allowed us to see which factors would emerge as priorities for different market segments.

Among US Drive market travellers, **border and entry requirements** were the most significant factor influencing intent to visit Ontario. Given their proximity, these travellers tend to prefer short, flexible, and often spontaneous trips. A smooth, hassle-free border crossing experience is critical to ensuring that Ontario remains an attractive destination for them. Perceived barriers—such as documentation requirements, long wait times, or uncertainty around border policies—could deter visitation, making it essential to emphasize Ontario's ease of access in marketing campaigns.

For US Fly market travellers, **political neutrality and alignment** emerged in the mix with **providing good value** as influential factors. Air travellers from major US urban centers (e.g., NYC, Chicago) tend to be more politically engaged, have higher incomes, and are generally more selective in their travel choices. They perceive Ontario as a friendly and welcoming destination. Maintaining and reinforcing this positive perception will be key to sustaining and growing visitation from this segment.

KEY DRIVER ANALYSIS #1 – US DRIVE

In the US Drive market, "having a favourable exchange rate" is the strongest factor influencing intent to visit Ontario. This ranks significantly higher than other factors.

KPI	Impact	Perception
Has favourable exchange rate	42.2	43%
Has simple border and entry requirements	16.4	71%
Is easy to plan a trip for	8.0	84%
Delivers good vacation service or customer service	7.2	79%
Provides lots of things to do	4.1	87%
Has political values that align with my personal beliefs	3.9	55%
Is friendly and inclusive to all visitors	3.7	84%
Provides good value for money	3.7	77%
Is a politically neutral destination	3.7	58%
Has good travel infrastructure (e.g., transportation)	2.8	77%
Has great natural environment/landscape attractions	2.8	87%
Is a safe destination for travel	1.5	87%

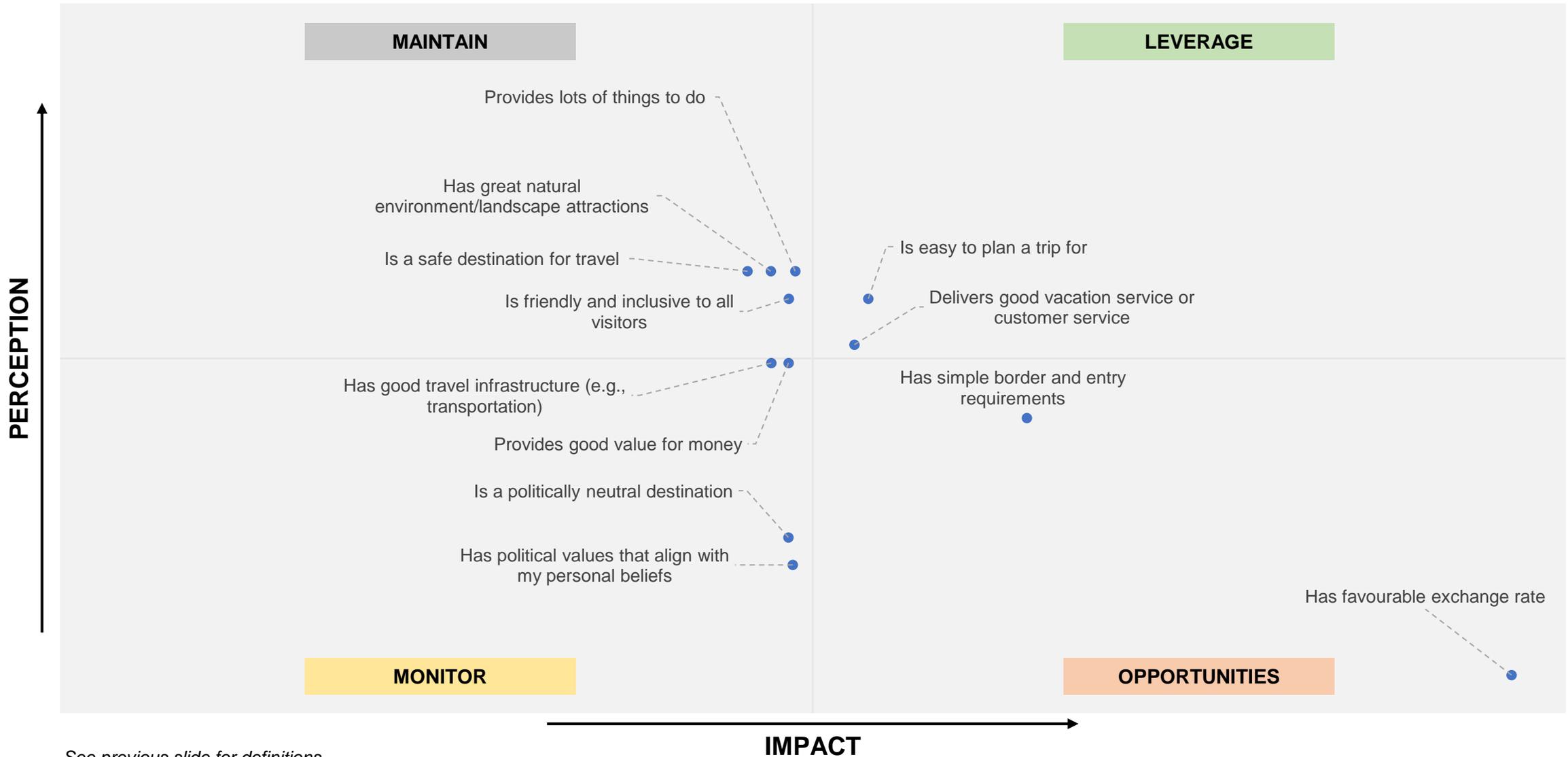
Definitions

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, I2)

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, I2)

A detailed description of this analytical approach is available on **slide 10**.

KEY DRIVER ANALYSIS #1 – US DRIVE



See previous slide for definitions.

KEY DRIVER ANALYSIS #1 – US FLY

Similarly, in the US Fly market, "having a favourable exchange rate" is the most influential factor in the decision to visit Ontario, outweighing all other perceptions by a factor of four or more.

KPI	Impact	Perception
Has favourable exchange rate	42.5	53%
Provides lots of things to do	11.5	92%
Has good travel infrastructure (e.g., transportation)	9.2	90%
Is a politically neutral destination	9.1	73%
Has great natural environment/landscape attractions	6.1	92%
Provides good value for money	5.4	86%
Has political values that align with my personal beliefs	5.1	70%
Delivers good vacation service or customer service	4.5	88%
Is friendly and inclusive to all visitors	2.6	91%
Is easy to plan a trip for	2.1	90%
Is a safe destination for travel	1.2	93%
Has simple border and entry requirements	0.9	88%

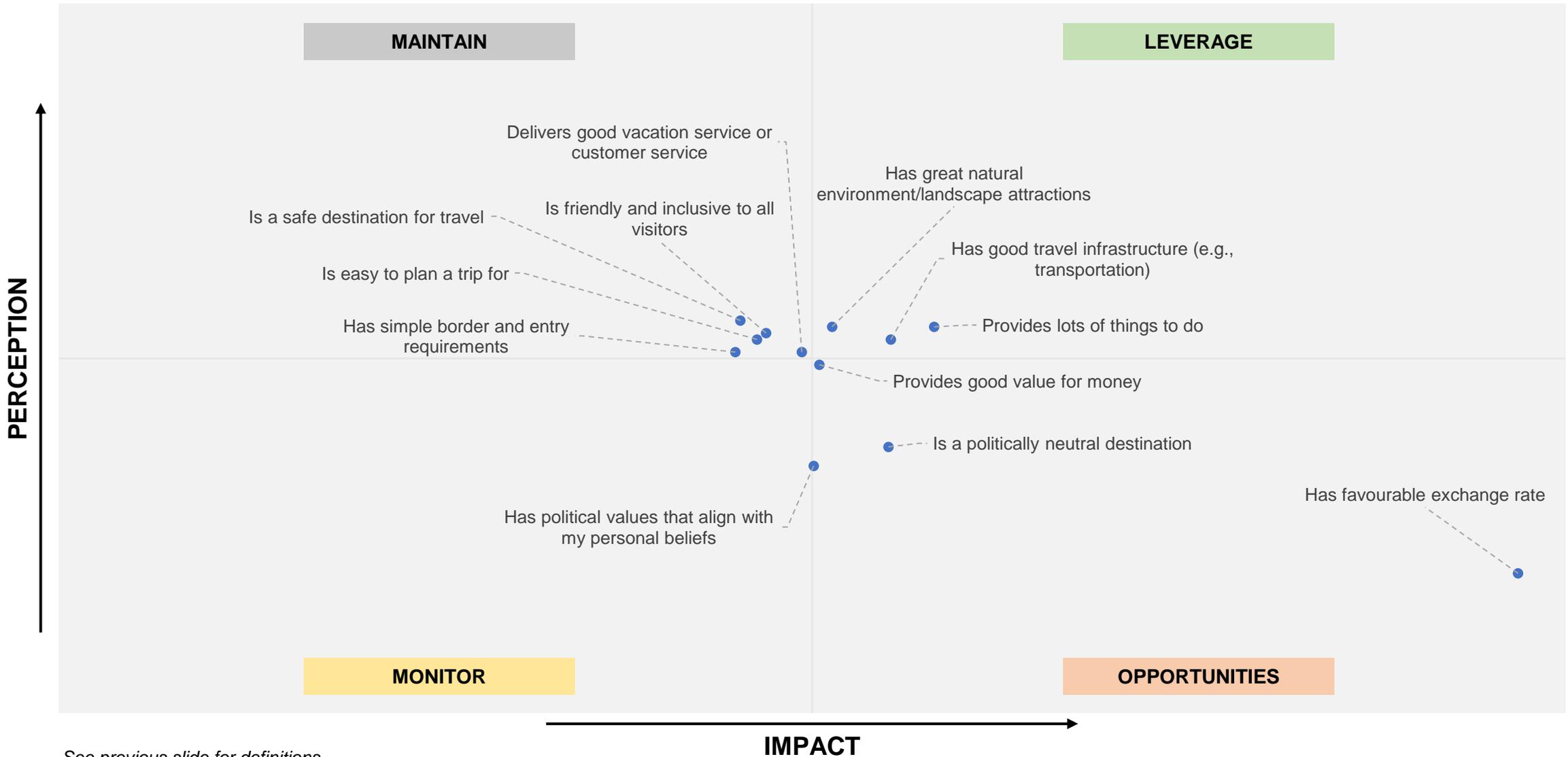
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A detailed description of this analytical approach is available on **slide 10**.

KEY DRIVER ANALYSIS #1 – US FLY



See previous slide for definitions.

KEY DRIVER ANALYSIS #2 – US DRIVE (WITHOUT EXCHANGE RATE)

In the US Drive market, 'border and entry requirements' have the strongest influence on intent to visit Ontario, when “favourable exchange rate” is excluded. Given their proximity, these travellers often seek short getaways and spontaneous trips, making a smooth, hassle-free crossing experience especially important.

KPI	Impact	Perception
Has simple border and entry requirements	28.7	71%
Is easy to plan a trip for	13.4	84%
Delivers good vacation service or customer service	12.9	79%
Is a politically neutral destination	7.2	58%
Has political values that align with my personal beliefs	6.7	55%
Provides lots of things to do	6.6	87%
Provides good value for money	6.4	77%
Is friendly and inclusive to all visitors	6.0	84%
Has good travel infrastructure (e.g., transportation)	5.3	77%
Has great natural environment/landscape attractions	4.3	87%
Is a safe destination for travel	2.5	87%

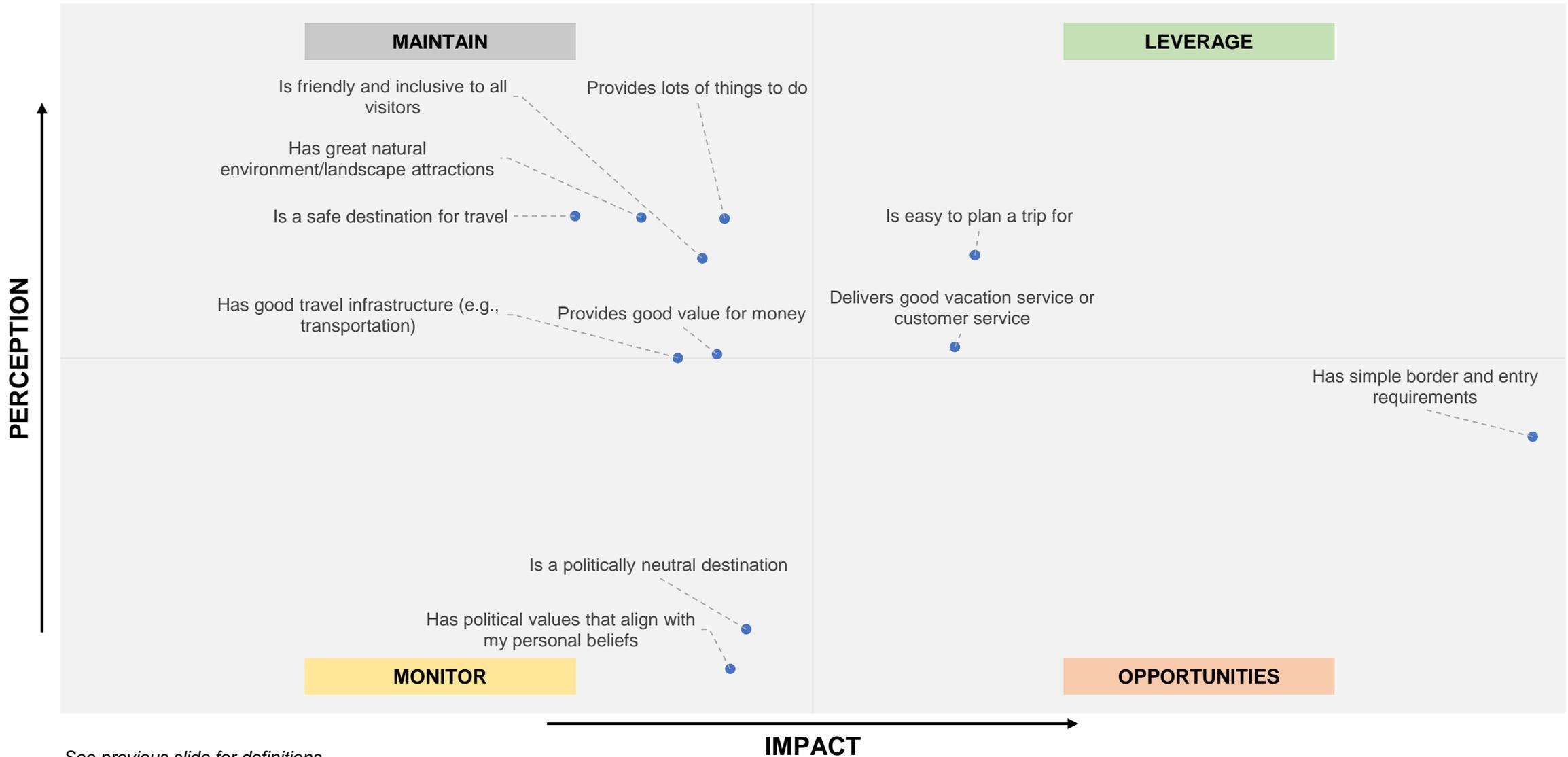
Definitions

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 10**.

KEY DRIVER ANALYSIS #2 – US DRIVE (WITHOUT EXCHANGE RATE)



See previous slide for definitions.

KEY DRIVER ANALYSIS #2 – US FLY (WITHOUT EXCHANGE RATE)

In the US Fly market, political views and alignment tend to be a greater influence on their likelihood of visiting Ontario, when “favourable exchange rate” is excluded. This may be because these travellers from this market reside in large urban areas and have higher incomes, making them more politically informed and engaged.

KPI	Impact	Perception
Has good travel infrastructure (e.g., transportation)	17.5	90%
Provides lots of things to do	16.4	92%
Is a politically neutral destination	14.7	73%
Provides good value for money	11.1	86%
Has great natural environment/landscape attractions	10.2	92%
Has political values that align with my personal beliefs	10.0	70%
Delivers good vacation service or customer service	8.9	88%
Is easy to plan a trip for	4.0	90%
Is friendly and inclusive to all visitors	3.9	91%
Is a safe destination for travel	1.9	93%
Has simple border and entry requirements	1.5	88%

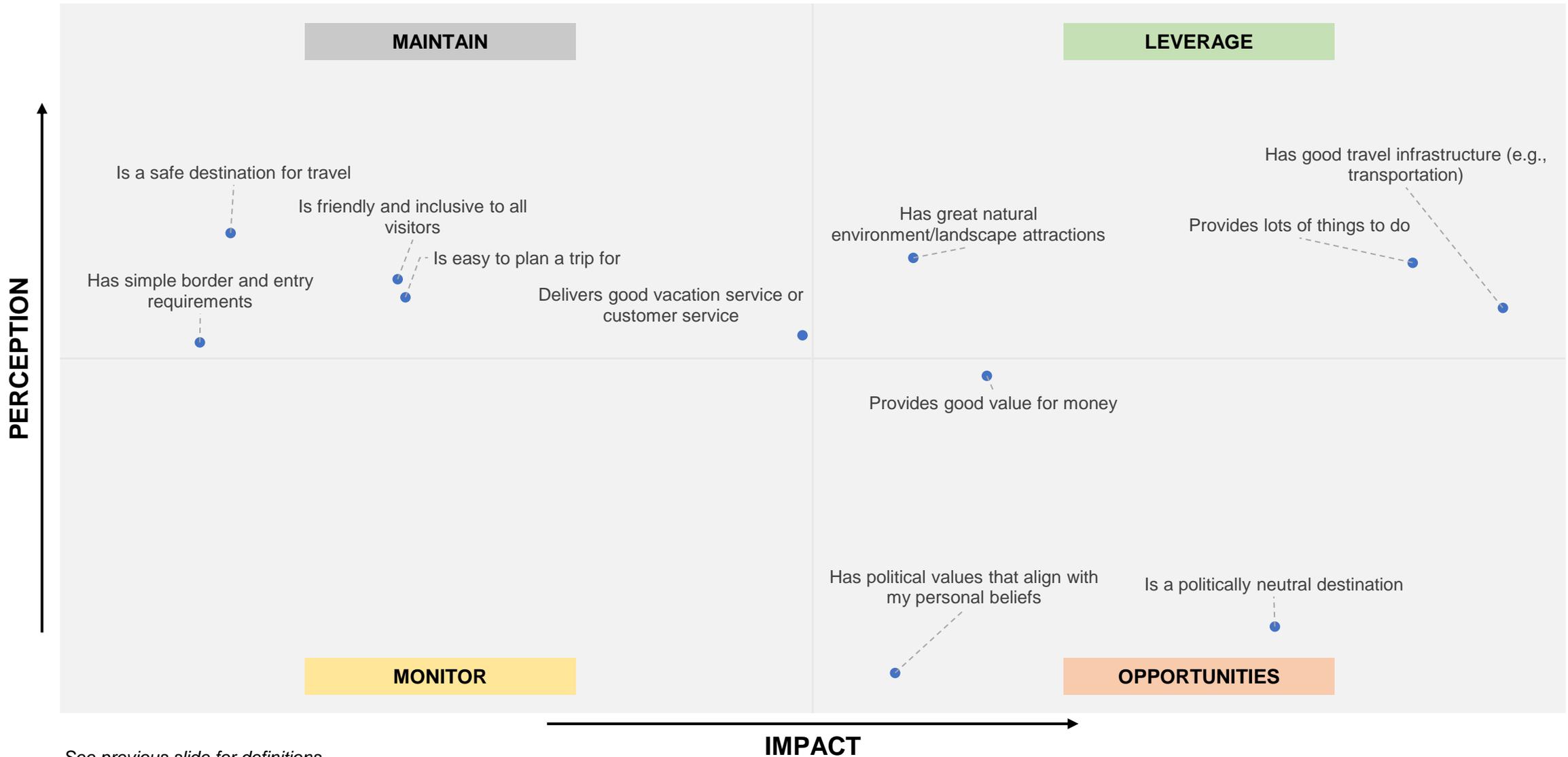
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KEY DRIVER ANALYSIS #2 – US FLY (WITHOUT EXCHANGE RATE)



See previous slide for definitions.



 Ottawa (RTO10)

PERCEPTIONS OF ONTARIO AND CANADA

More than half of U.S. respondents are likely to take a leisure trip to Ontario in the next 12 months, with those in the U.S. Fly market showing greater interest than those in the Drive market. They also rated Canada as a whole, Ontario, and Italy highly as a pleasure travel destination.

Ontario is widely perceived as a safe travel destination, offering a variety of activities, stunning natural landscapes, and a welcoming, inclusive atmosphere. Respondents also find it easy to plan a trip there.

Additionally, three in five respondents view Ontario as politically neutral and feel its political values align with their own, while a third remain neutral on this aspect.

PLEASURE TRIPS TO ONTARIO

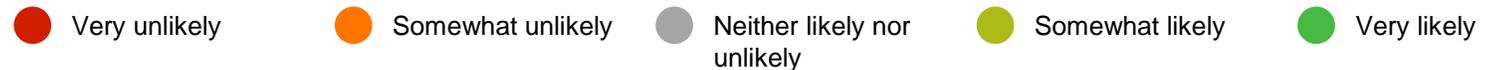
Around three in five respondents are likely to plan a pleasure trip for at least one night to Ontario in the next 12 months.

Travellers from the US Fly market (63%) demonstrate a higher likelihood of travelling to Ontario, particularly those from the New York City area (66%). However, travellers from Chicago (56%) are less likely to take a trip to Ontario in the next 12 months.

The US Drive market has a lower proportion of travellers planning to visit Ontario (53%), with Michigan residents showing the lowest likelihood to travel at 51%.

Likelihood for a Trip to Ontario

TOP2



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=1575

COUNTRIES AS PLEASURE TRAVEL DESTINATIONS

Italy, Canada, and Ontario are rated highly as pleasure travel destinations by U.S. residents, with four in five giving them top ratings.

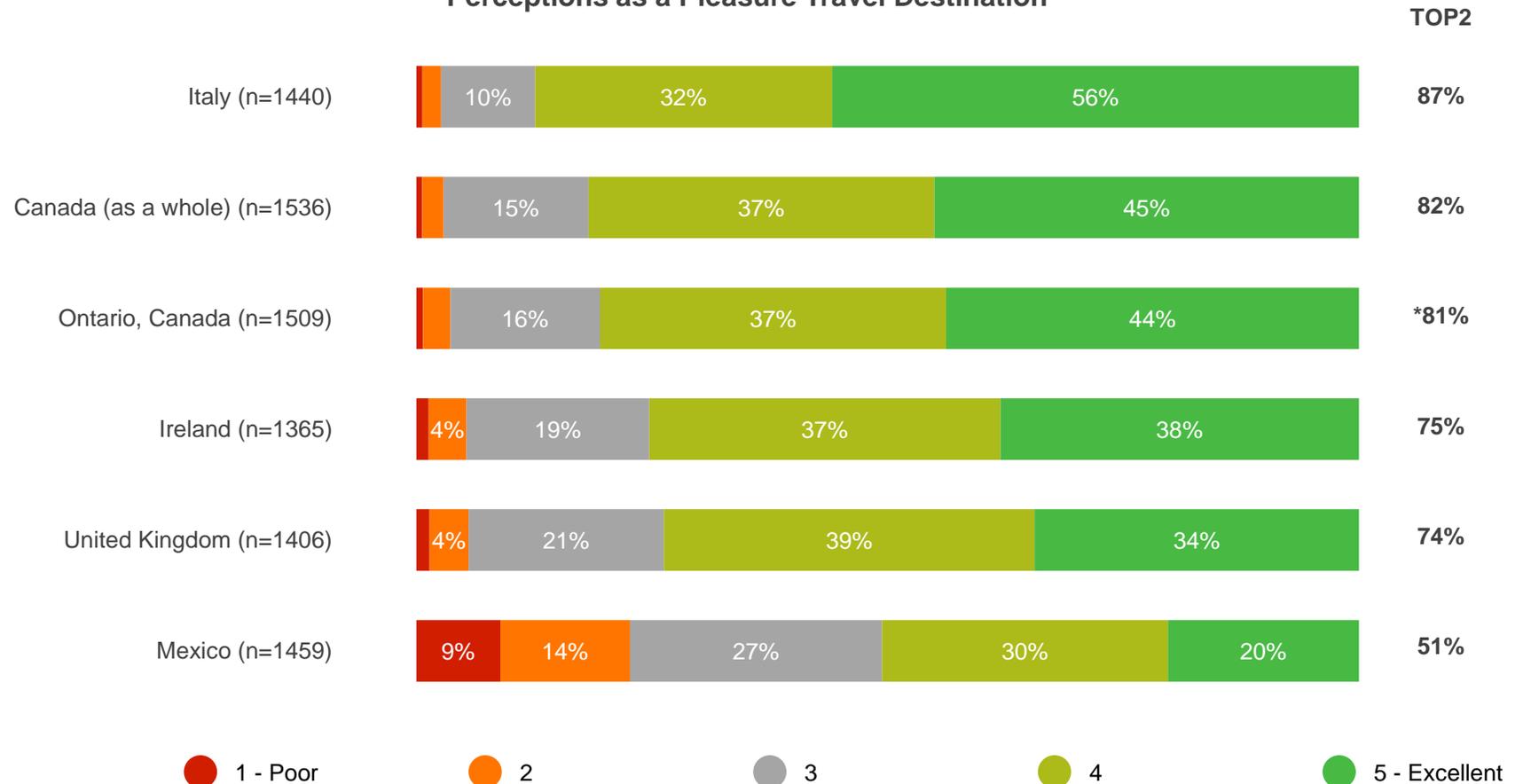
While Ireland and the United Kingdom also receive strong ratings, Mexico is rated the lowest as a pleasure travel destination among U.S. travellers.

Destinations rated significantly higher among the US Fly market compared to the US drive market include:

- Italy (90%)
- United Kingdom (79%)
- Mexico (54%).

*2024 benchmark data: 79%

Perceptions as a Pleasure Travel Destination



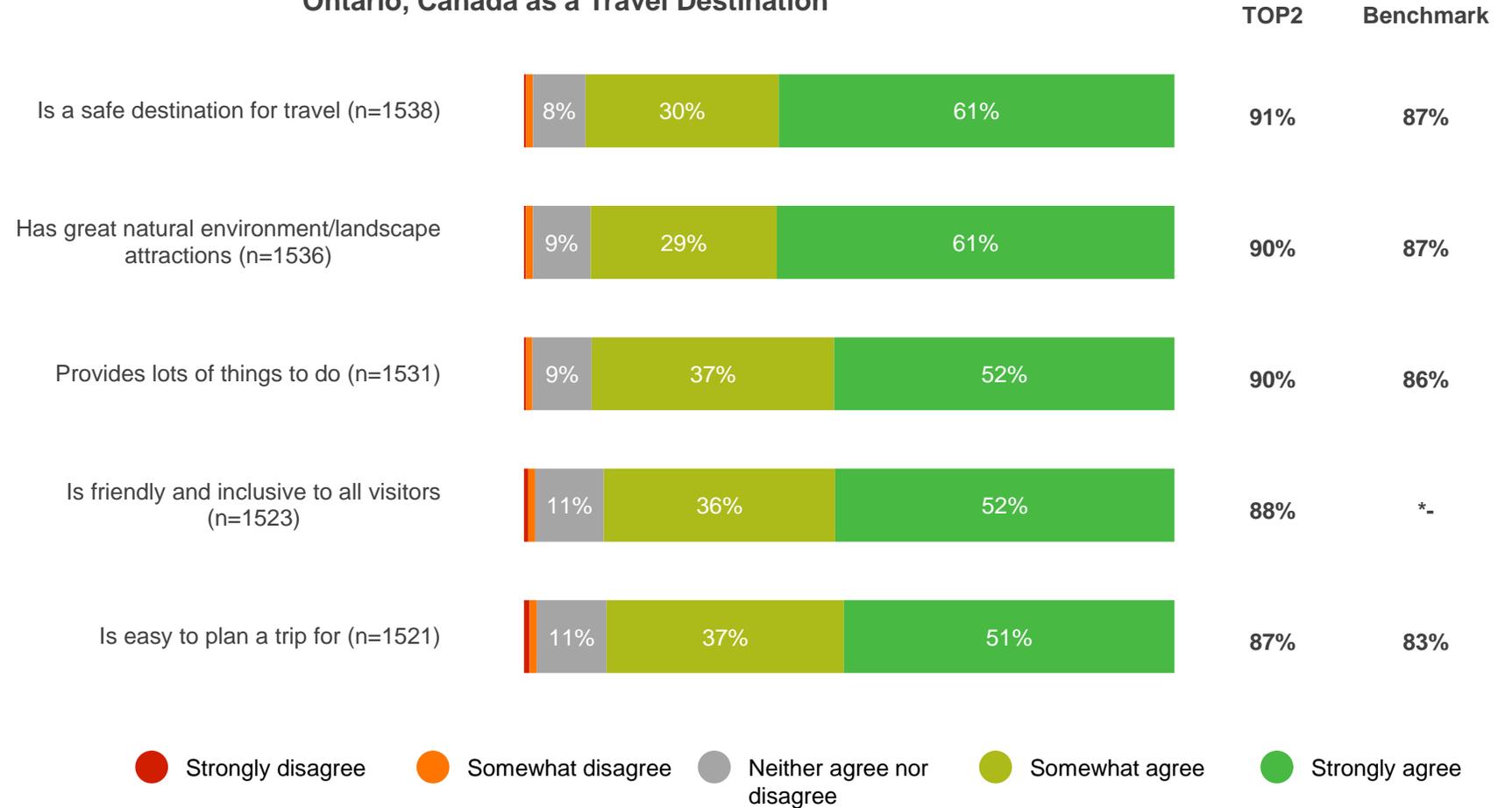
P1. Overall, how would you rate the following as pleasure travel destinations? (Labels <4% not visualized) (Excludes "Don't know")

ONTARIO AS A TRAVEL DESTINATION

The majority of respondents agree with the listed perceptions, with at least half indicating strongly agree.

**No benchmark data available. This metric is not included in standard tracking studies.*

Ontario, Canada as a Travel Destination



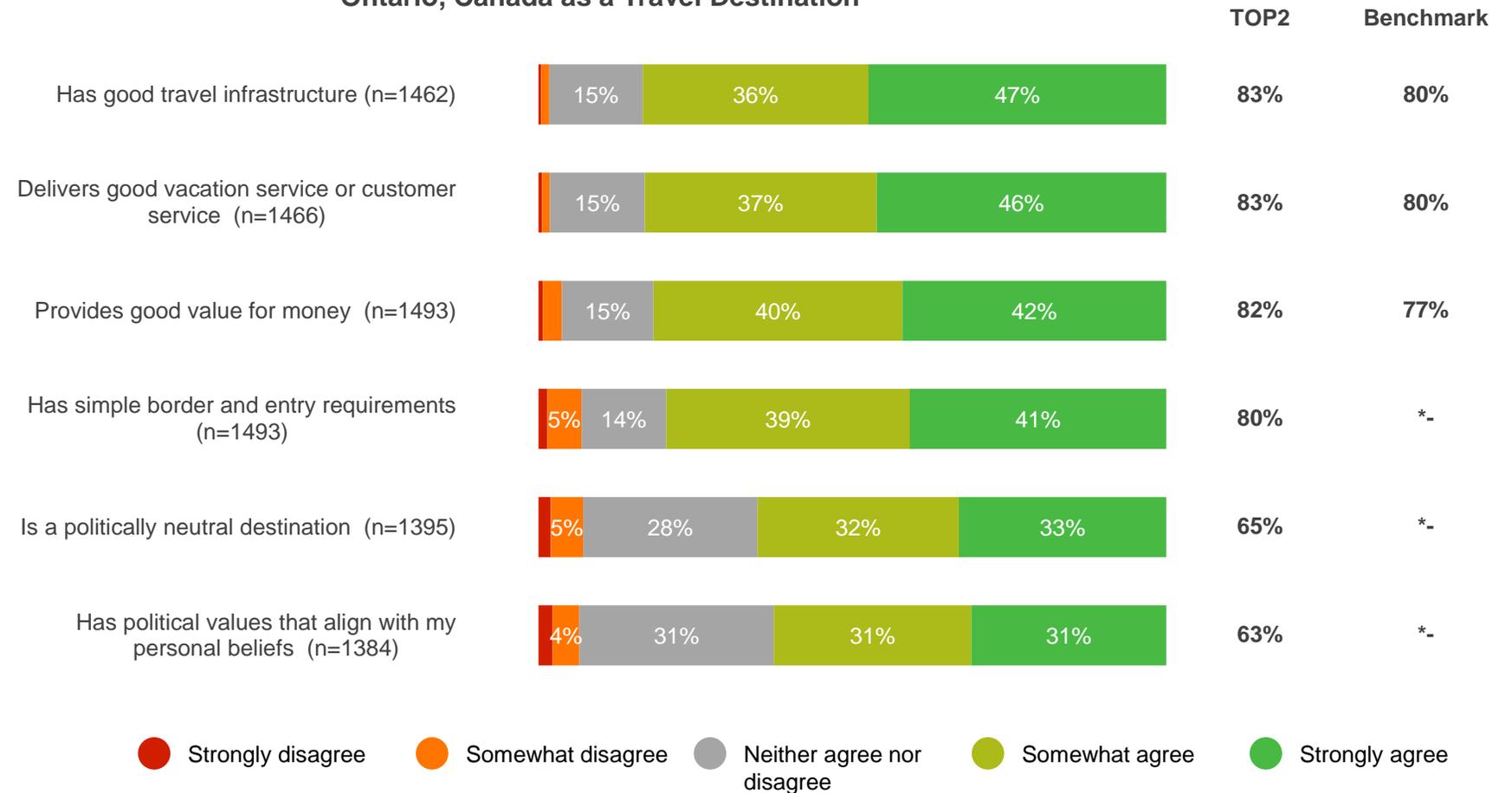
P5A. Thinking only about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...? (Labels <4% not visualized) (Excludes "Don't know")

ONTARIO AS A TRAVEL DESTINATION – CONTINUED

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

**No benchmark data available. This metric is not included in standard tracking studies.*

Ontario, Canada as a Travel Destination



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

Canada is seen as the most welcoming country for US visitors, and over a third of respondents believe it will become even more welcoming next year. This positive perception is driven by Canada's reputation for safety, friendly locals, and easy border crossings.

Cost is the largest potential deterrent for US visitors to travel to Ontario signifying the value-centric perception of Ontario. While the Fly market is concerned with weather, the Drive market is more concerned with delays and hassles at border crossings.



 Niagara (RTO2)

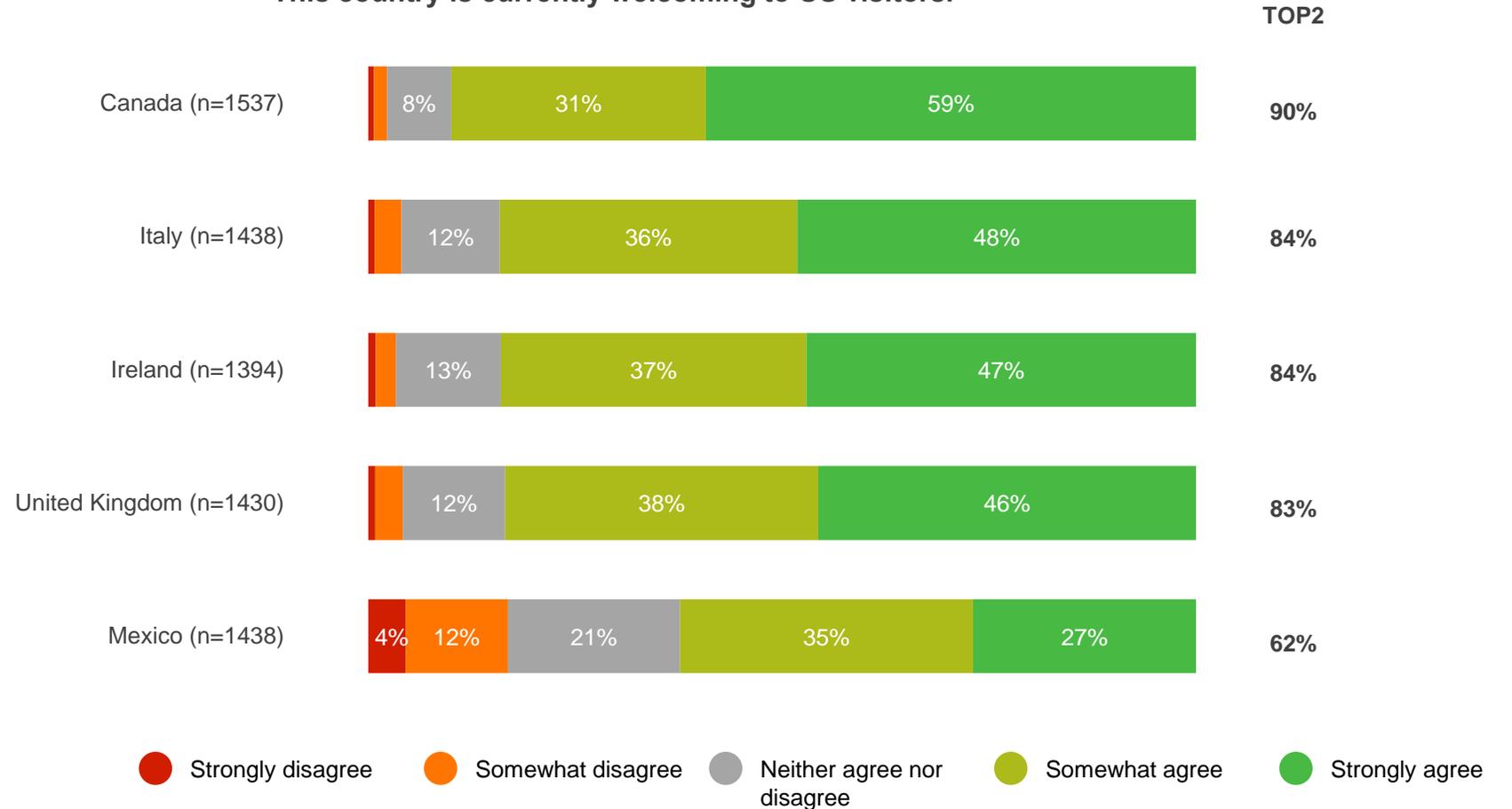
WELCOMING TO US VISITORS

Canada is considered the most welcoming country for US visitors, with nine in ten holding this view.

While Italy, Ireland and UK are also seen as welcoming, Mexico received the lowest ratings.

The US Fly market, particularly those from NYC, views all countries as welcoming.

“This country is currently welcoming to US visitors.”



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”)

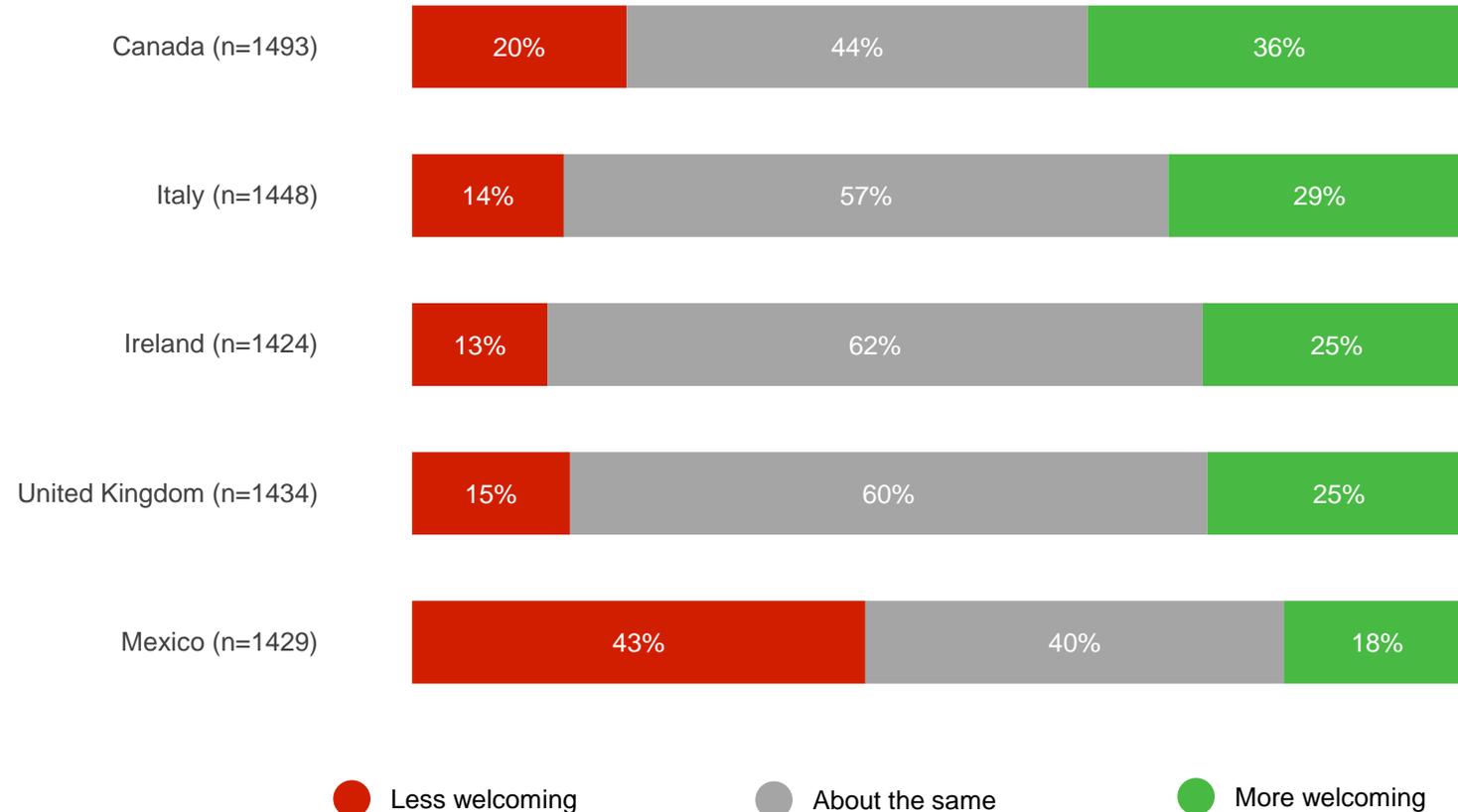
WELCOMING TO US VISITORS

One in three US residents believe Canada will become even more welcoming to them next year. Meanwhile, nearly half think it will be about the same.

For Italy, Ireland, and the UK, three in five respondents expect the sentiment towards US visitors to remain unchanged. Meanwhile, two in five believe Mexico would be less welcoming a year from now.

Although the US Drive market has lower expectations from all countries (except Canada) to be welcoming in the next year, a higher proportion in both Fly and Drive market believe these countries' reception of US visitors will remain unchanged.

Feeling of Welcoming



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

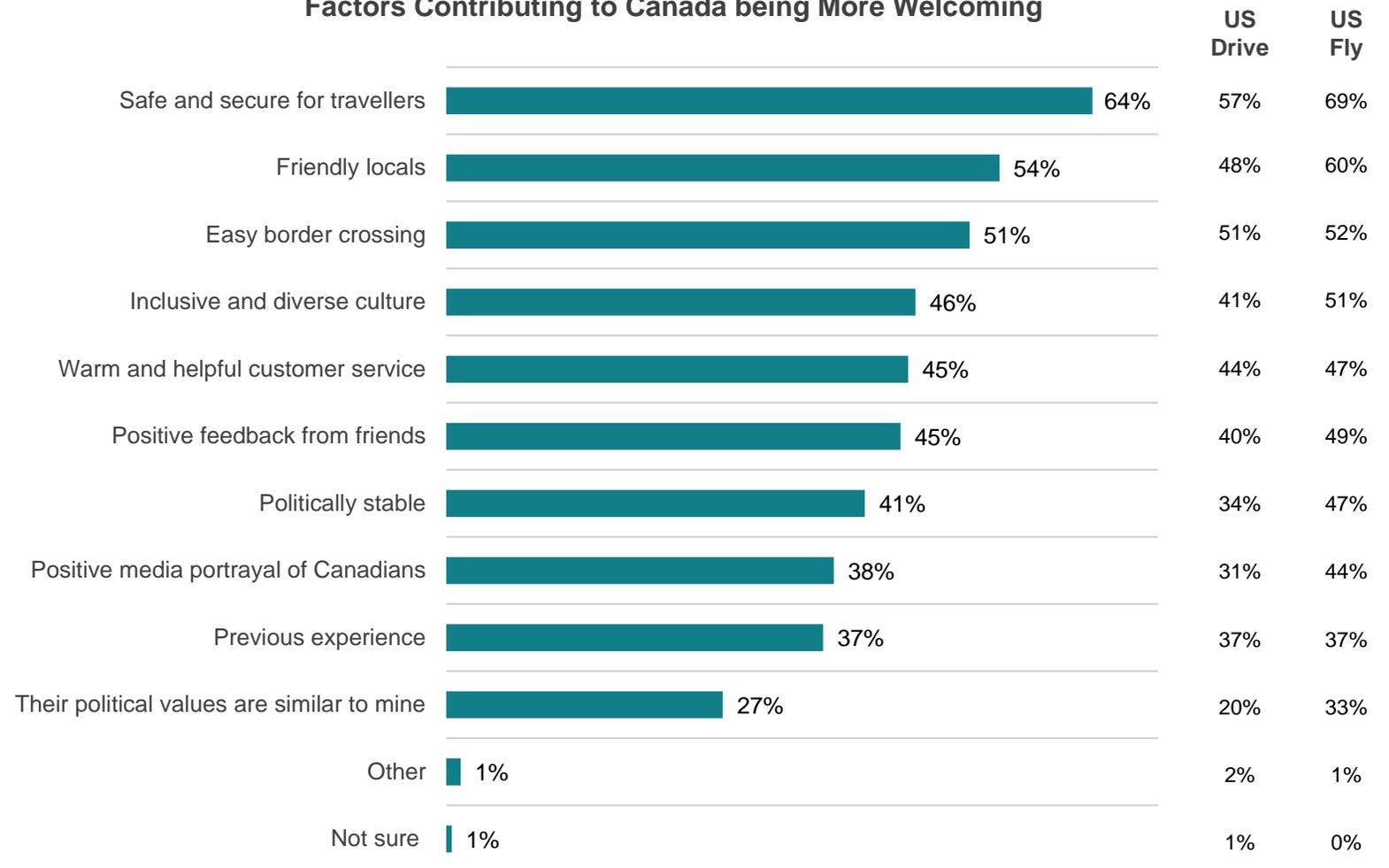
Being safe and secure for travellers is the top factor contributing to the perception of Canada being more welcoming, with three in five stating this.

Friendly locals (54%) and easy border crossing (51%) are other factors aiding to positive perceptions among the US visitors for Canada.

The US Fly market also credits stable politics (47%), positive media portrayal of Canadians (44%) and their own aligned political values (33%) to the favourable view of Canada being more welcoming to them in the coming year.

Positive feedback of friends is an important and influential factor among households with children (51%).

Factors Contributing to Canada being More Welcoming



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=537

CANADA LESS WELCOMING TO US VISITORS

Respondents who think Canada will be less welcoming, regard political tensions between US and Canada as the most important reason for their perception.

Anti-American sentiments (45%) also seem to contribute to the negative perceptions about Canada being less welcoming to the US visitors.

Positive affirmations about friendly and welcoming Canadians towards the US visitors would be critical to gain the confidence back.

Factors Contributing to Canada being Less Welcoming

		US Drive	US Fly
Political tensions between US and Canada	84%	83%	85%
Anti-American sentiment	45%	36%	55%
Difficult border-crossing requirements	18%	17%	19%
Concerns about safety or security	10%	16%	4%
Unclear travel regulations	10%	11%	9%
Their political values differ from mine	9%	8%	10%
Reports of discrimination or bias	7%	7%	8%
Negative media portrayal of Canada	7%	7%	6%
Perception of unfriendly locals	7%	7%	6%
Negative stories from friends or family	6%	7%	4%
Other	9%	12%	6%
Not sure	<1%	0%	0%

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)

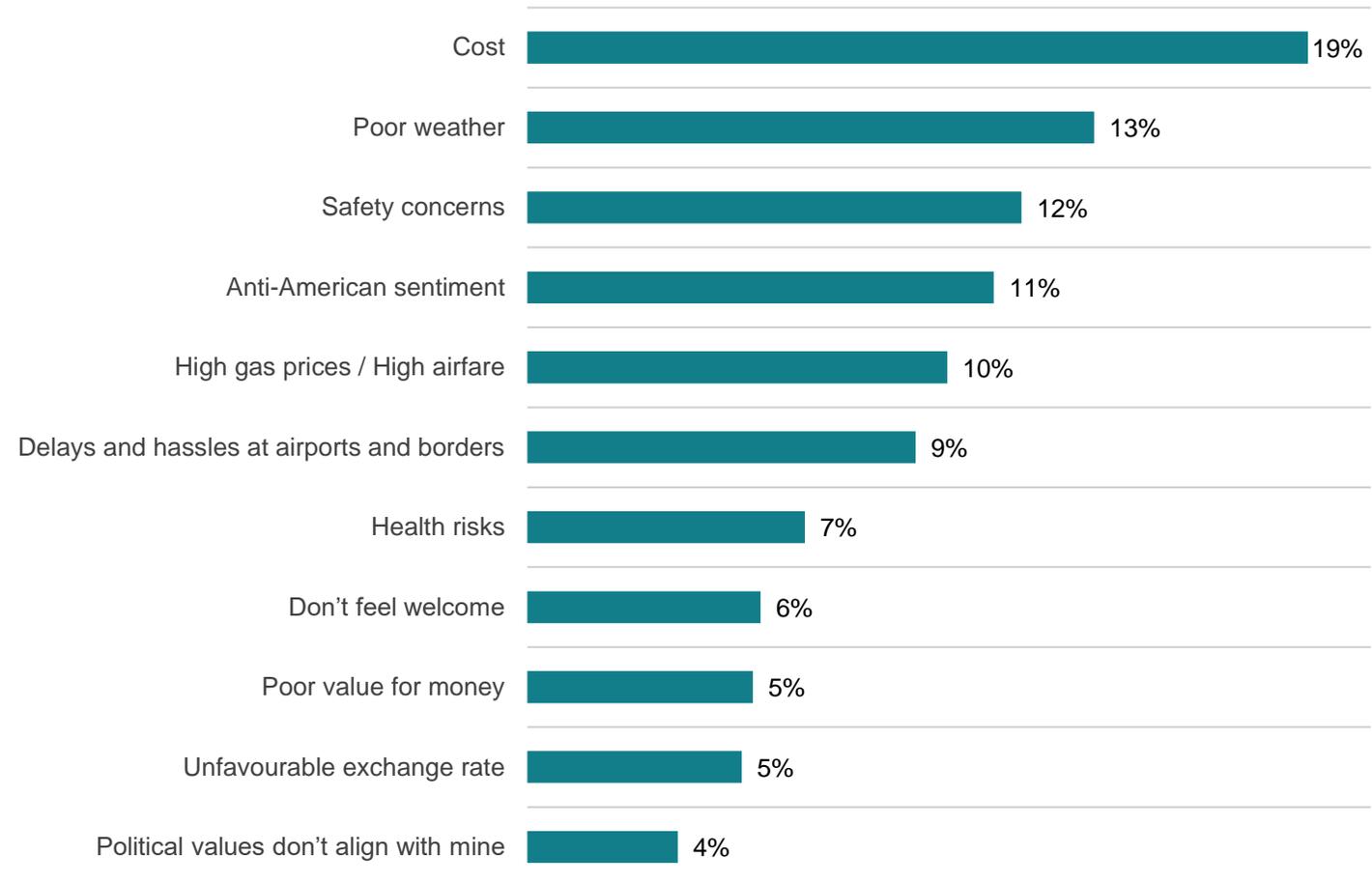
Respondents who said Canada will be Less Welcoming. n=302

TOP RANKED BARRIERS TO VISIT ONTARIO, CANADA

Cost is the top reason discouraging respondents from visiting Ontario.

While the US fly-in market (17%) cites poor weather as a concern, the drive-in market (12%) is more worried about delays and hassles at border crossings.

Barriers to Visit Ontario, Canada



B1. Which of the following factors might discourage you from visiting Ontario, Canada? (Ranking)
All Respondents. n=1610

TRAVEL PREFERENCES

For travel within the US, two in five respondents plan to travel more within the next 12 months, while another two in five anticipate no change to their current travel plans.

For international travel, a third of the US respondents plan to take more international trips, while half expect no change to their existing plans over the next 12 months.



US residents are either keeping their travel plans within the US unchanged (47%) or planning to take more trips (42%) in the next 12 months.

Travel Plans Within the US for the Next 12 Months



● Take fewer trips within the US ● No change in my plans ● Take more trips within the US

T1A. Which of the following best describes your domestic travel plans in the next 12 months?
All respondents. n=1610

Half of the respondents say they are not changing their international travel plans for the next 12 months, while one-third plan to take more international trips.

The US Drive market are more likely to maintain their current international travel plans (64%), whereas the Fly market are more likely to take more international trips (44%).

International Travel Plans for the Next 12 Months



- Take fewer international trips
- No change in my plans
- Take more international trips

T1B. Which of the following best describes your international travel plans in the next 12 months?
All respondents. n=1610



 Algonquin Park (RTO12)

AWARENESS

While US residents are generally aware of the favourable US dollar exchange rates (60%), their attention is even more focused on recent political events. Approximately 70% of those surveyed were aware of President Donald Trump's proposal regarding Canada's statehood and the implementation of 25% tariffs on Canada. The US Fly market tends to be more aware of these topics.

Three in five respondents are aware of favourable exchange rate for travel to Canada, with the Fly market showing notably higher awareness at 67%.

Awareness of Higher US Dollar Exchange Value

TOP2



- Very unaware
- Somewhat unaware
- Neither aware nor unaware
- Somewhat aware
- Very aware

A1. How aware are you that the US dollar has a higher exchange value than the Canadian dollar (1.44, as of January 22nd)? (Excludes "Don't know")
All respondents. n=1574

CANADA BECOMING THE 51ST STATE

Three in four respondents are aware of President Donald Trump's proposal for Canada becoming the 51st state. Consistent with previous findings, awareness is higher among the US Fly market, reaching 80%.

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

TOP2



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=1587

AWARENESS ABOUT TARIFFS

Three in four respondents are aware of President Donald Trump's plans to impose 25% tariffs on Canada, with the Fly market showing even greater awareness at 82%.

Awareness about 25% Tariffs on Canada

TOP2



- Very unaware
- Somewhat unaware
- Neither aware nor unaware
- Somewhat aware
- Very aware

A3. How aware are you that US President Donald Trump has stated he plans to impose 25% tariffs on Canada? (Excludes "Don't know")
All respondents. n=1583

IMPACT ON TRAVEL PLANS

Around two in five expressed concerns around border crossing and entry requirements for Canada. This apprehension is greater among the US Drive market.

Nearly half of the respondents are more likely to travel to Ontario in the next 12 months due to the favourable exchange rate, while more than a third remain uncertain about their travel plans despite the favourable rate.

Neither the US Presidential election nor political news/commentary have any significant impact on the travel plans of respondents for the next 12 months.

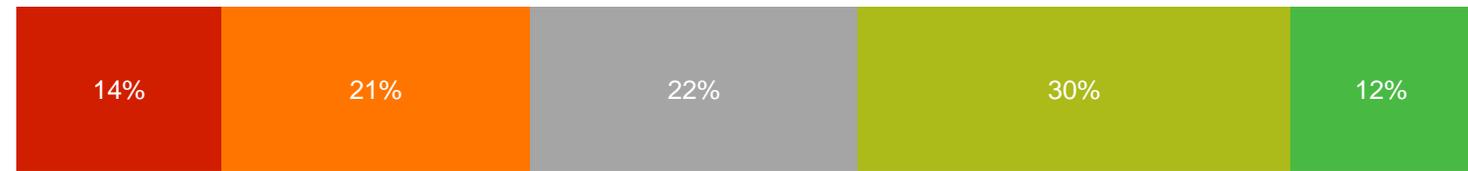
Respondents are divided in their outlook on the US-Canada relationship over the next 12 months, with some expecting improvement, others anticipating a decline, and a portion believing it will remain the same.



US residents show relatively low concern about border crossings, entry requirements, or travel restrictions to Ontario, Canada, with only two in five expressing any worry.

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

TOP2



● Very disagree ● Somewhat disagree ● Neither agree nor disagree ● Somewhat agree ● Very agree

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=1586

FAVOURABLE EXCHANGE RATE

The favourable exchange rate serves as a key driver for travel to Ontario for about half of the respondents.

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

TOP2



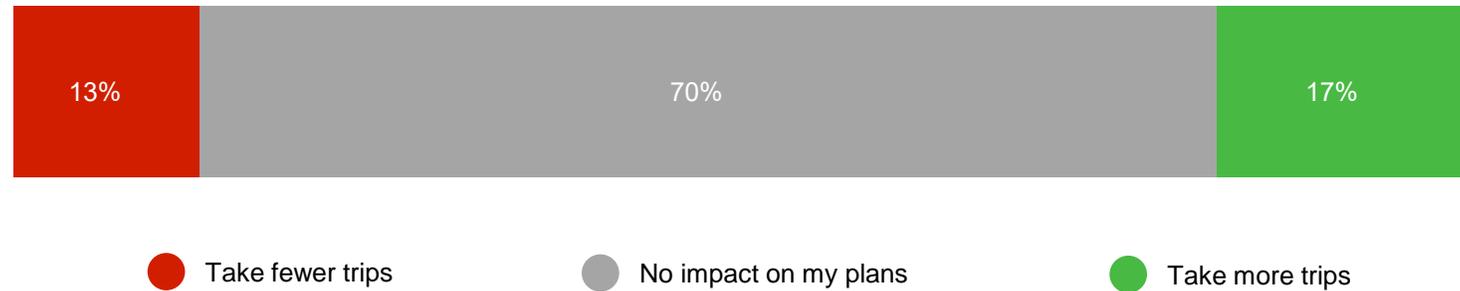
● Very disagree ● Somewhat disagree ● Neither agree nor disagree ● Somewhat agree ● Very agree

12. 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=1572

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

In line with earlier trends, the US Fly market continues to show a more positive shift in travel intentions, with 22% planning to take more trips in the next 12 months.

Impact of Presidential Election on Travel Plans



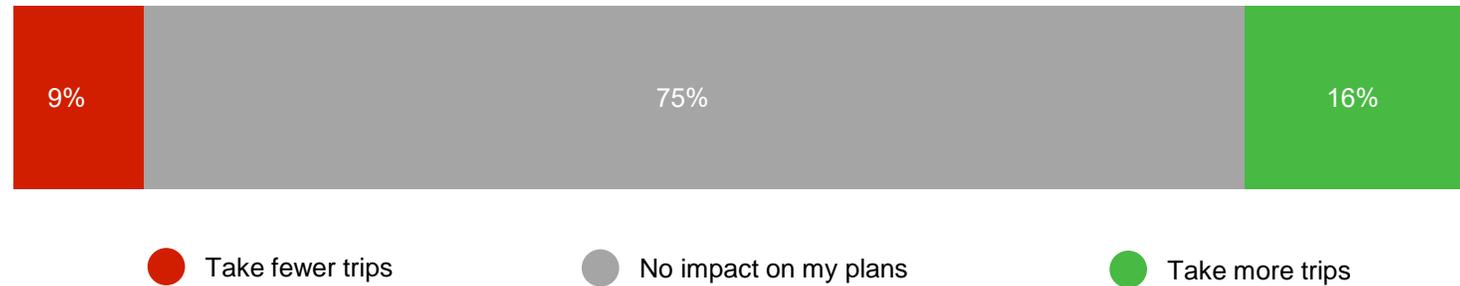
13. How did the outcome of the recent Presidential election influence your international travel plans in the next 12 months?
All respondents. n=1610

IMPACT OF POLITICAL NEWS OR COMMENTARY

The majority of respondents (75%) indicate that political news or commentary does not impact their travel plans to Ontario.

Continuing the trend, the US Fly market is more likely to travel to Ontario due to recent political news or commentary, with 20% reporting this influence.

Impact of Political News or Commentary



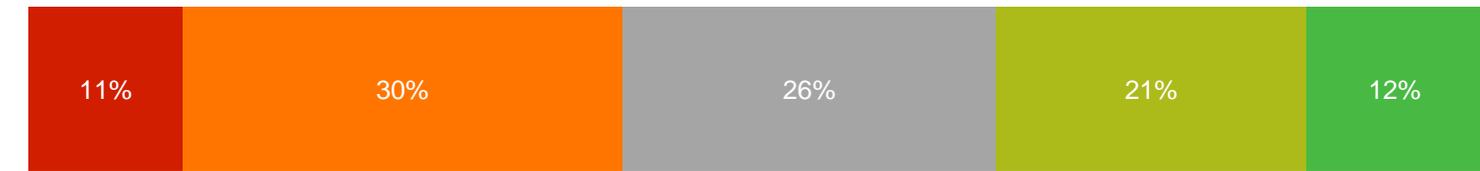
I3B. How have recent political news or commentary about Canada influenced your travel plans to Ontario in the next 12 months?
All respondents. n=1610

While a third of the respondents believe that the US-Canada relations will improve in the next 12 months, two in five hold the opposite view, believing the relationship will worsen.

The US Fly market tend to be more optimistic, with 37% anticipating an improvement in relations between the two countries in the next 12 months.

US and Canada Relationship in Next 12 Months

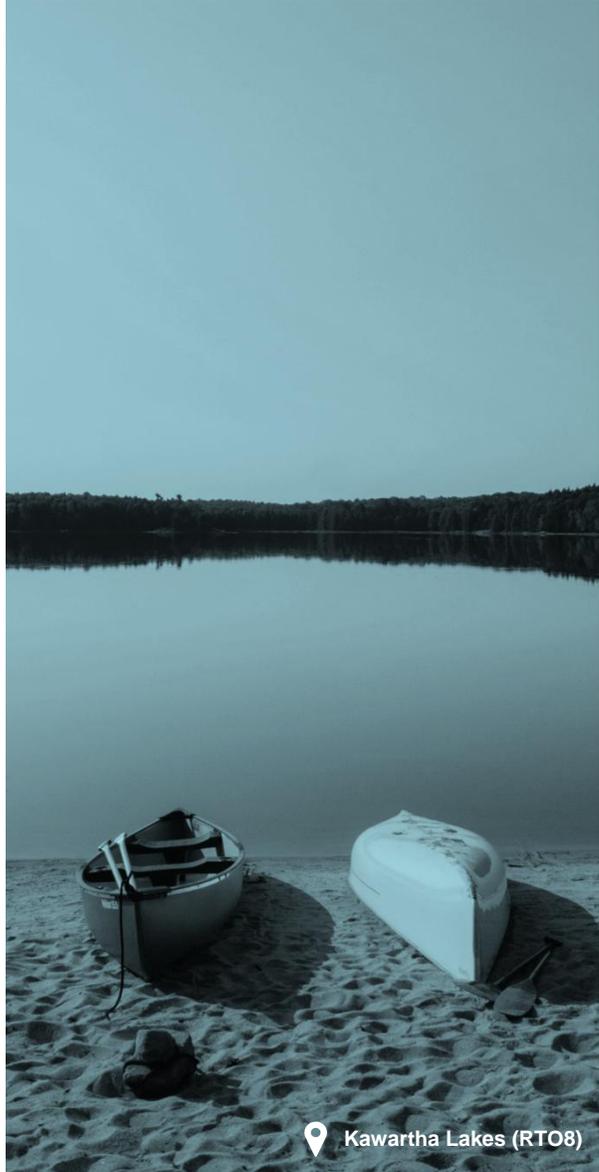
TOP2



- Significantly worsen
- Somewhat worsen
- Neither improve nor worsen
- Somewhat improve
- Significantly improve

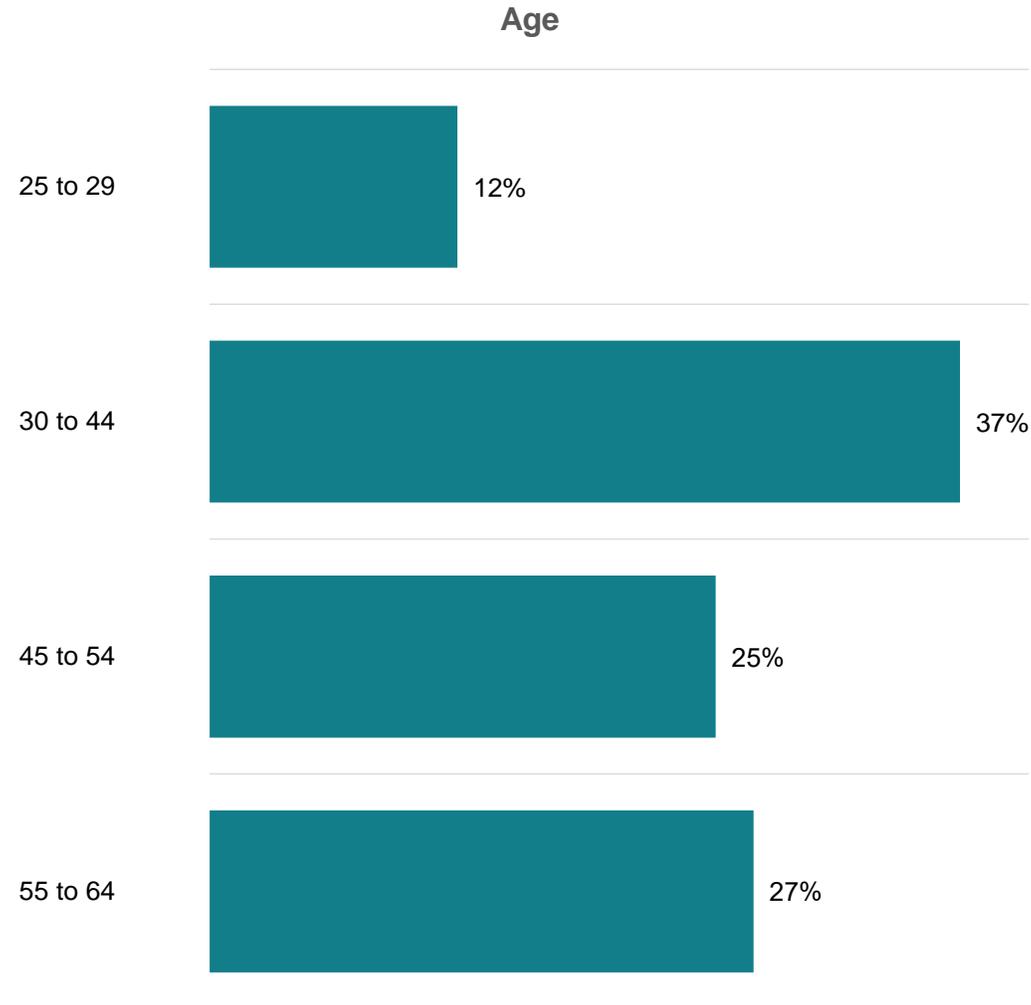
14. Over the next 12 months, how do you think the relationship between the US and Canada will change? (Excludes "Don't know")
All respondents. n=1475

DEMOGRAPHICS



 Kawartha Lakes (RTO8)

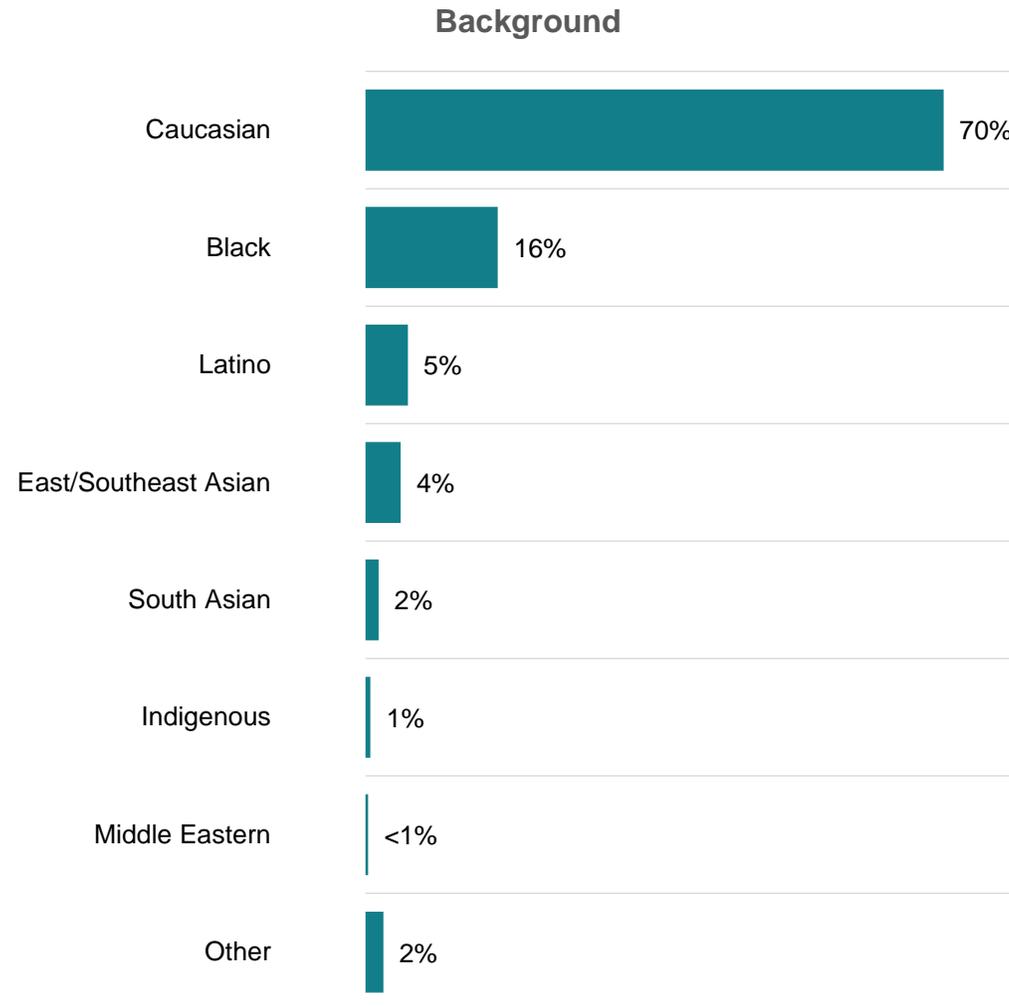
RESPONDENT PROFILE



SC1. Which category below includes your age: (Single-select)
All respondents. n=1610

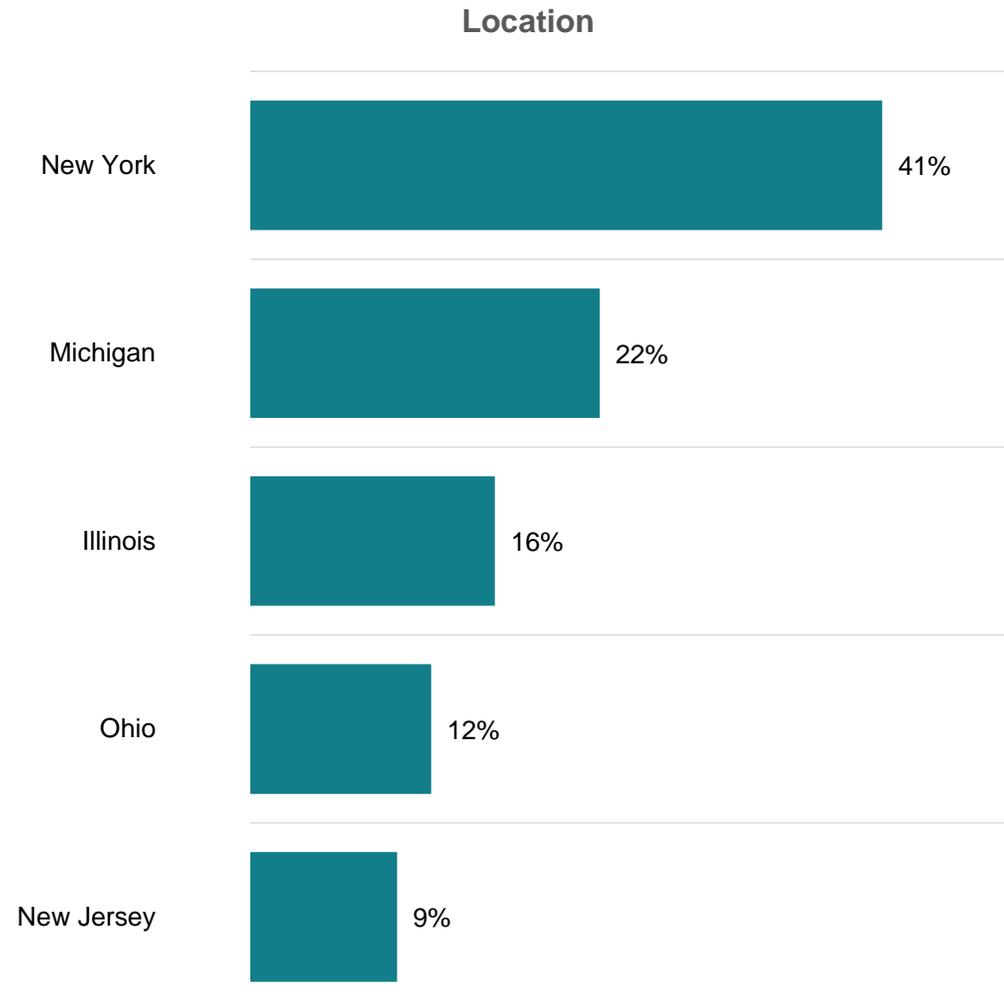
Gender



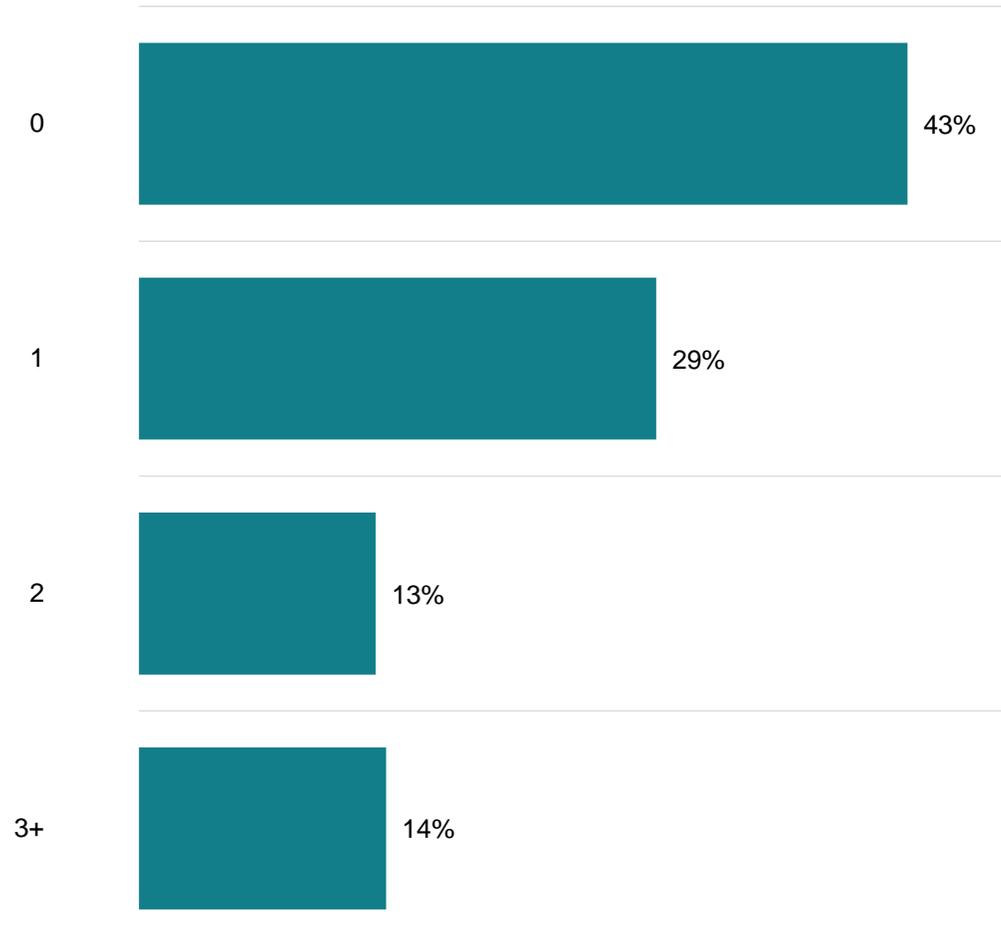


SC3 While most people in the United States view themselves as American, many have different ethnic or cultural origins or family backgrounds. With this in mind, please indicate which of these best describes your ethnic or cultural background:(Single-select)

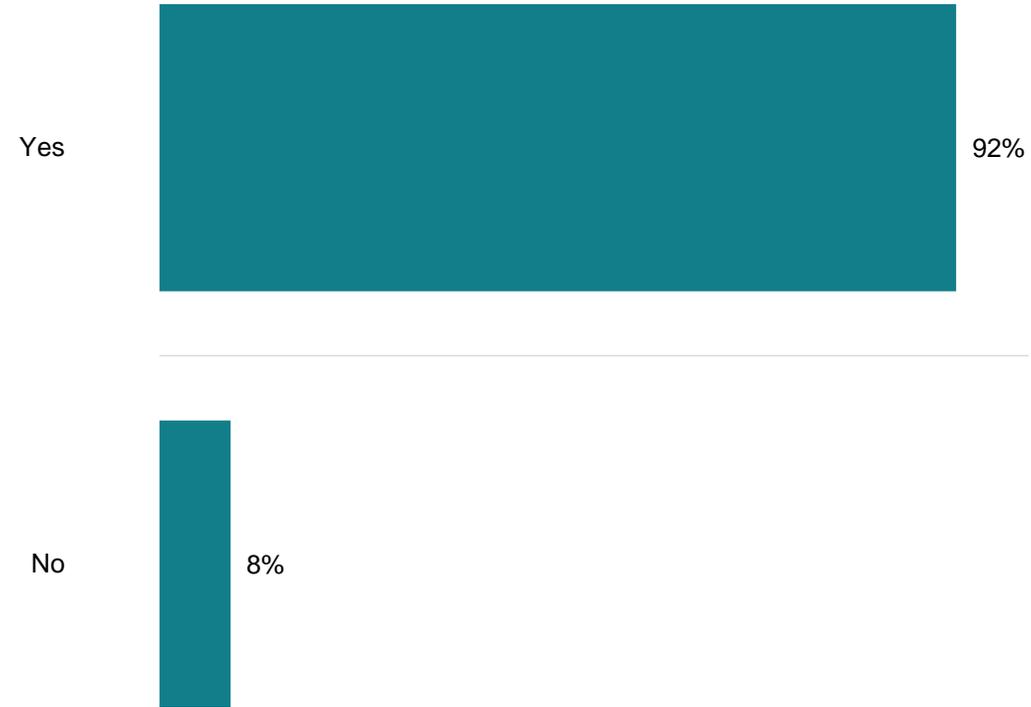
All respondents. n=1610



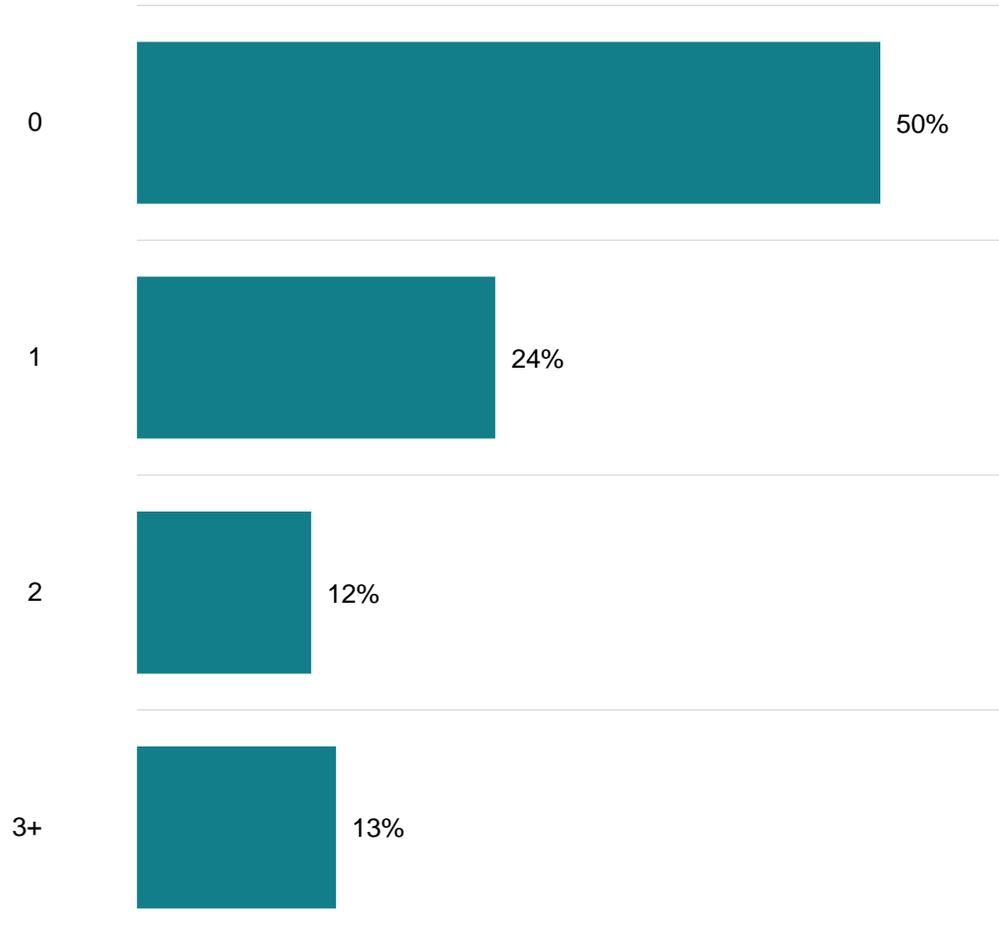
One or More Nights Trips To Ontario, Canada



Pleasure Trips In Past 2 Years

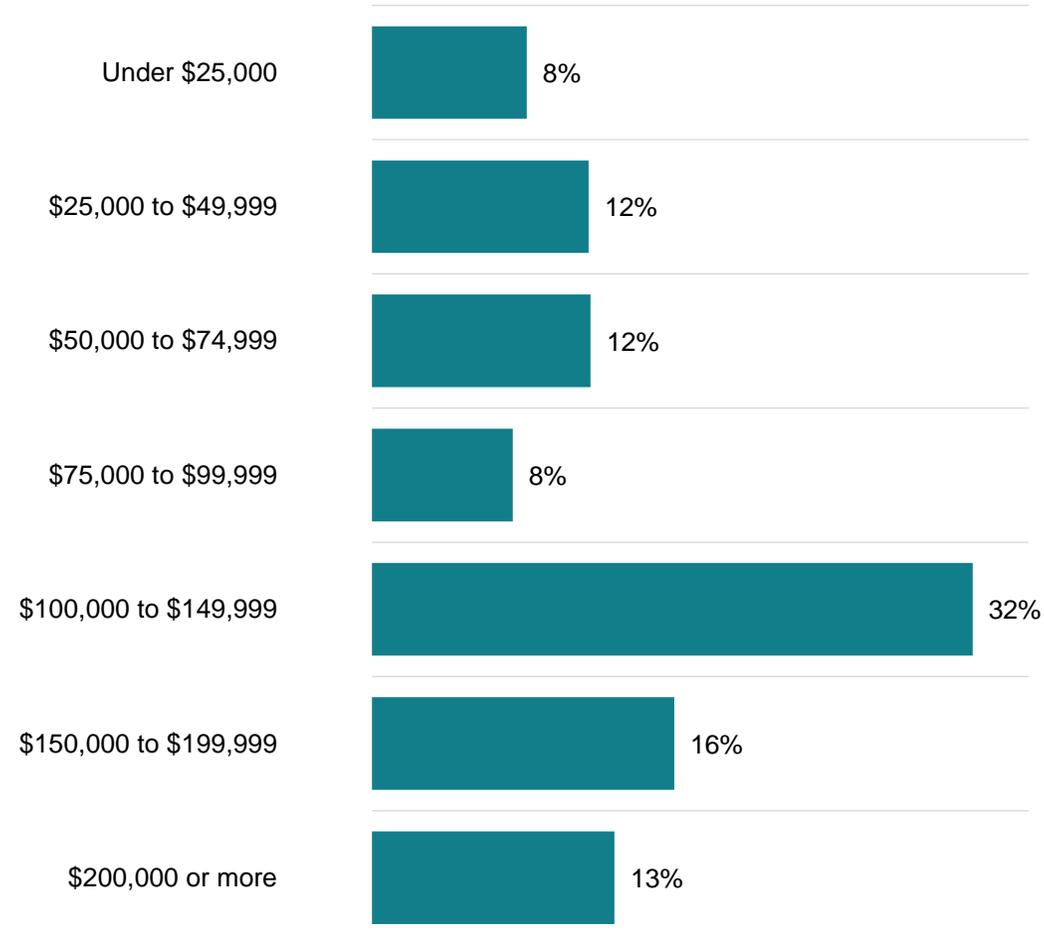


Day Trips To Ontario, Canada



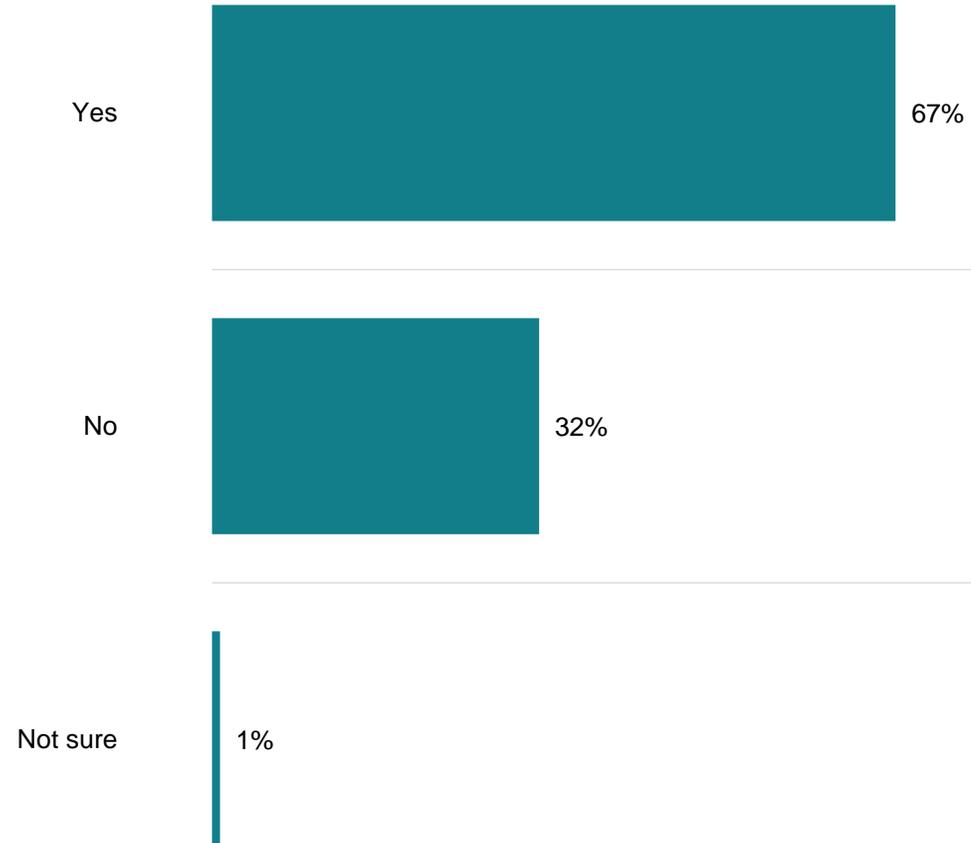
SC10 In the next 12 months, how many day trips are you planning to take to Ontario, Canada? (If 'None', type in '0') (Open ended)
All respondents. n=808

Income Before Tax



SC11 Which of the following best describes your household's total annual income before taxes? (Single-select)
All respondents. n=1610

Visited Ontario



Children In Household

