



CONTEXT IS EVERYTHING

US TRAVELLER SURVEY

Prepared for: Destination Ontario

March 17th, 2025

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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

Niagara Falls (RTO2)

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.

COUNTRIES AS PLEASURE TRAVEL DESTINATIONS

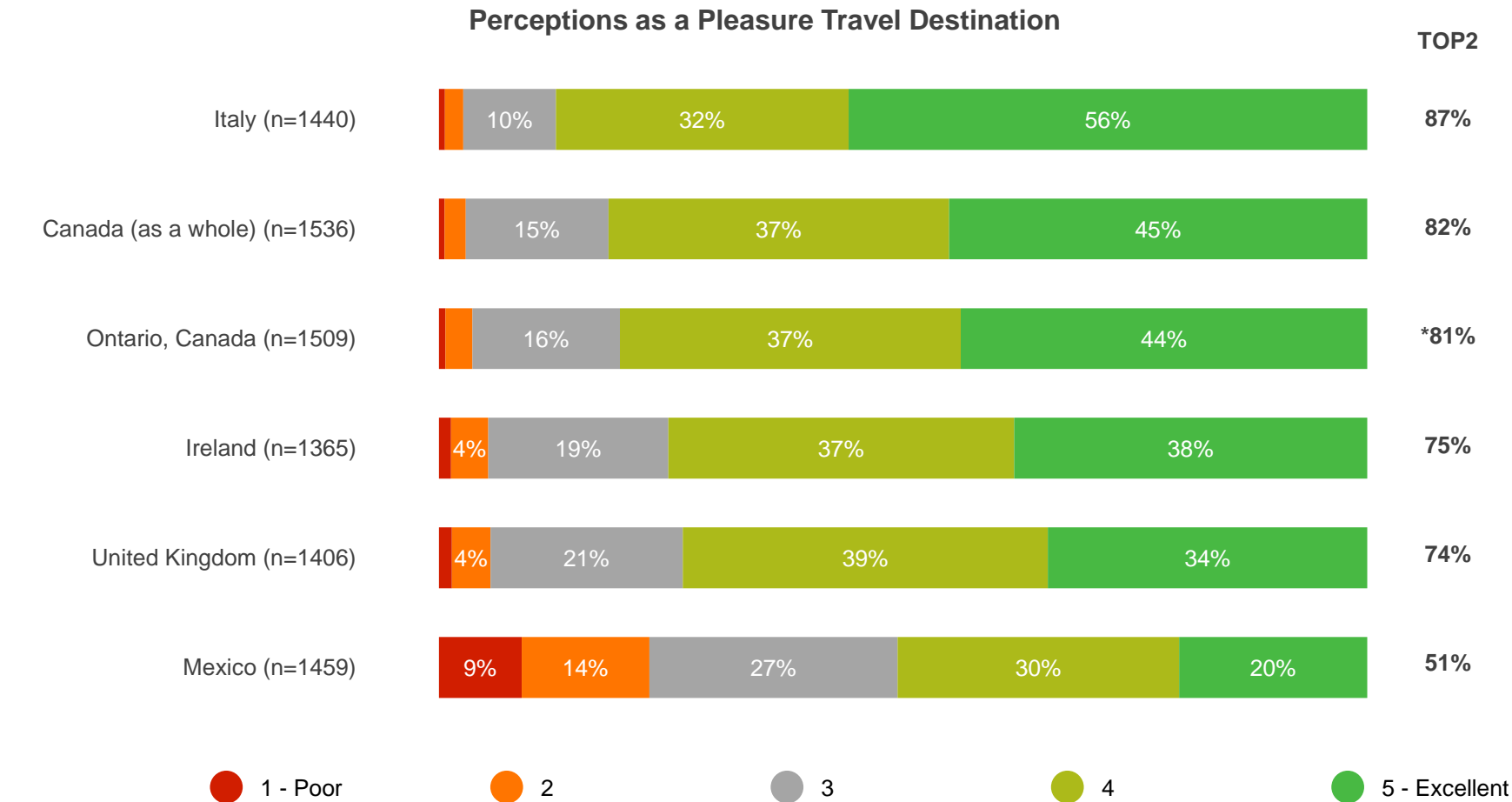
Italy, Canada, and Ontario are rated highly as pleasure travel destinations by U.S. residents, with four in five giving them top ratings.

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%).

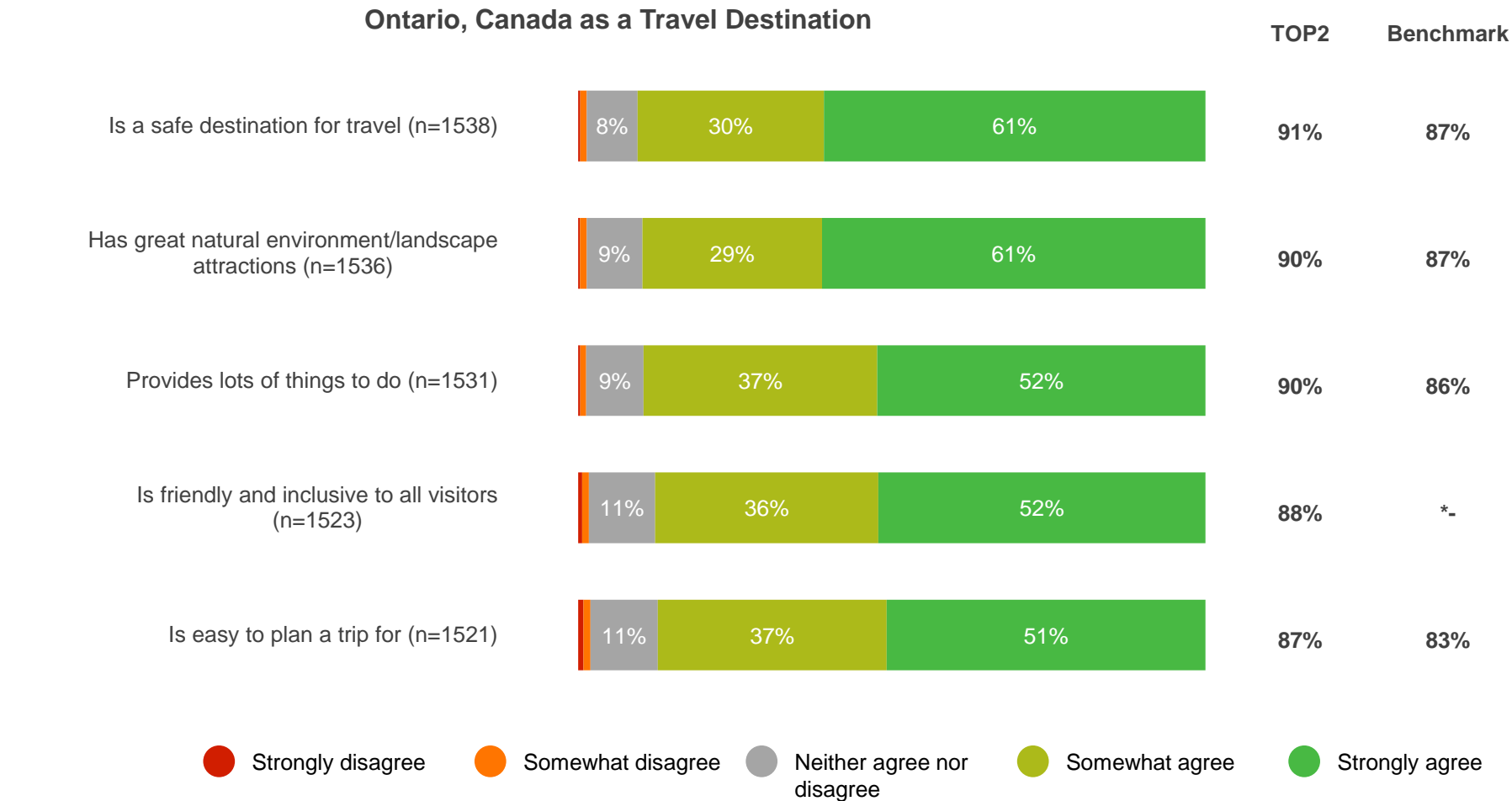
**2024 benchmark data: 79%*



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

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

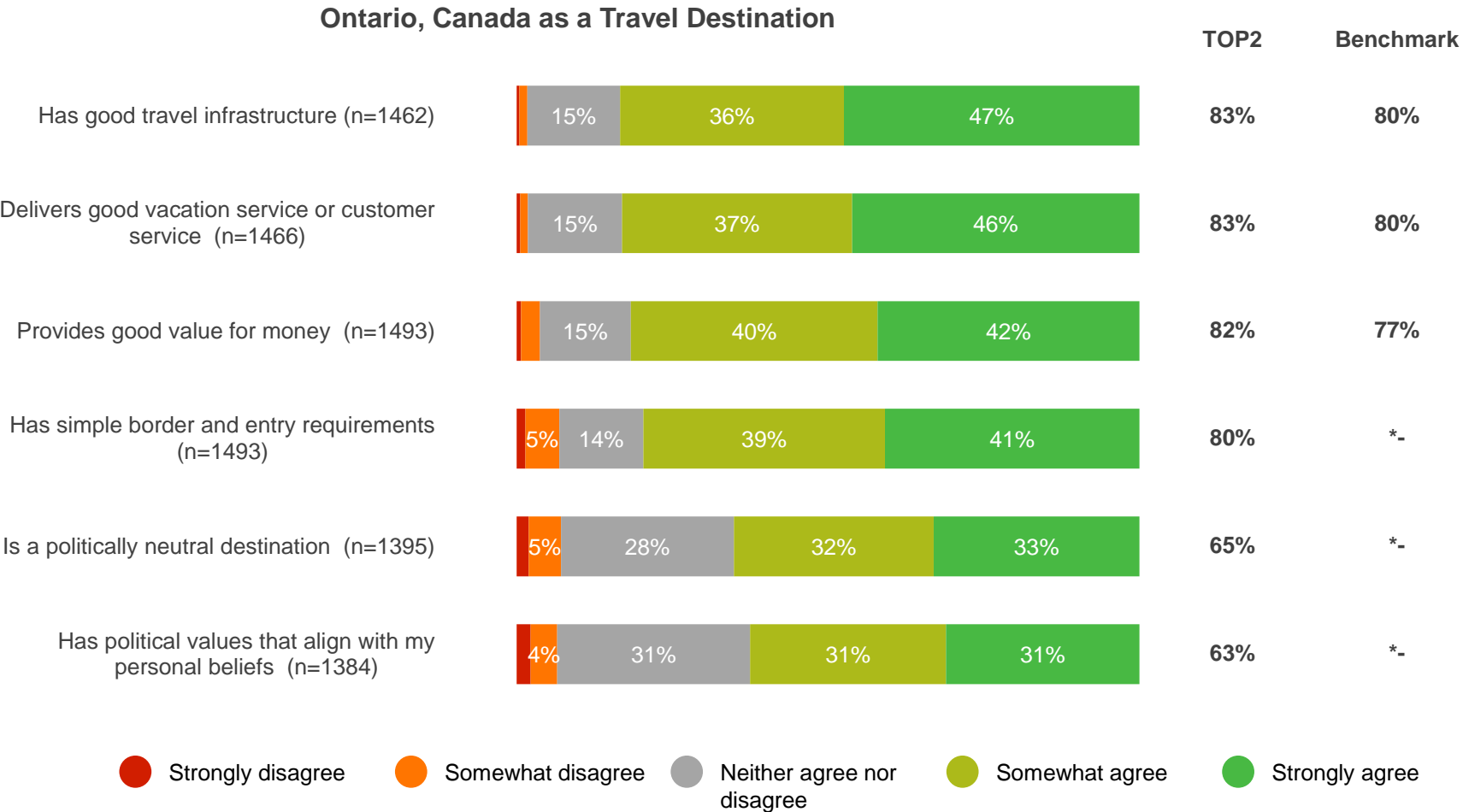
**No benchmark data available. This metric is not included in standard tracking studies.*



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 the political values align with their personal beliefs.

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



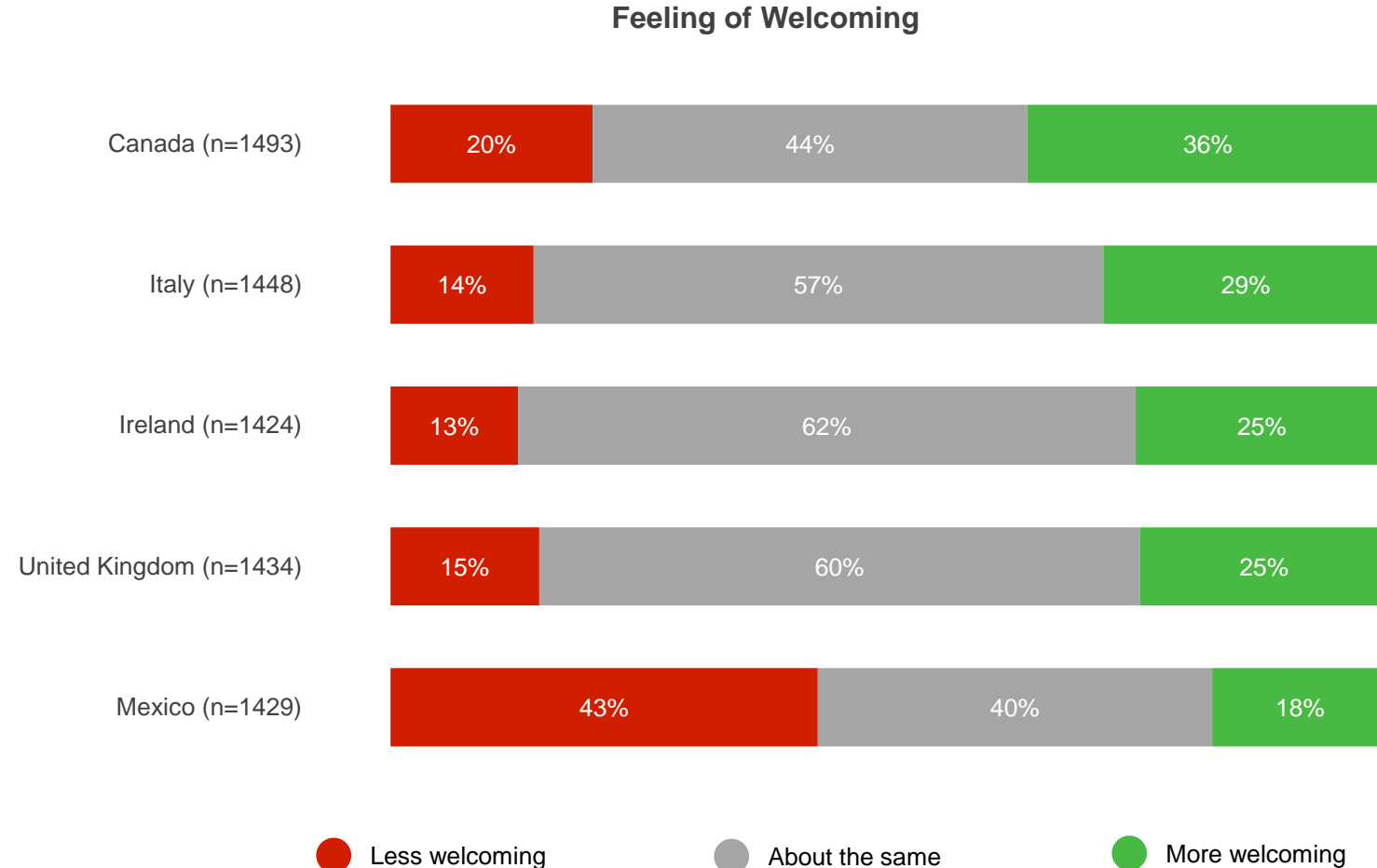
P5A. Thinking only about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...? (Labels <4% not visualized) (Excludes “Don’t know”)

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.



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")

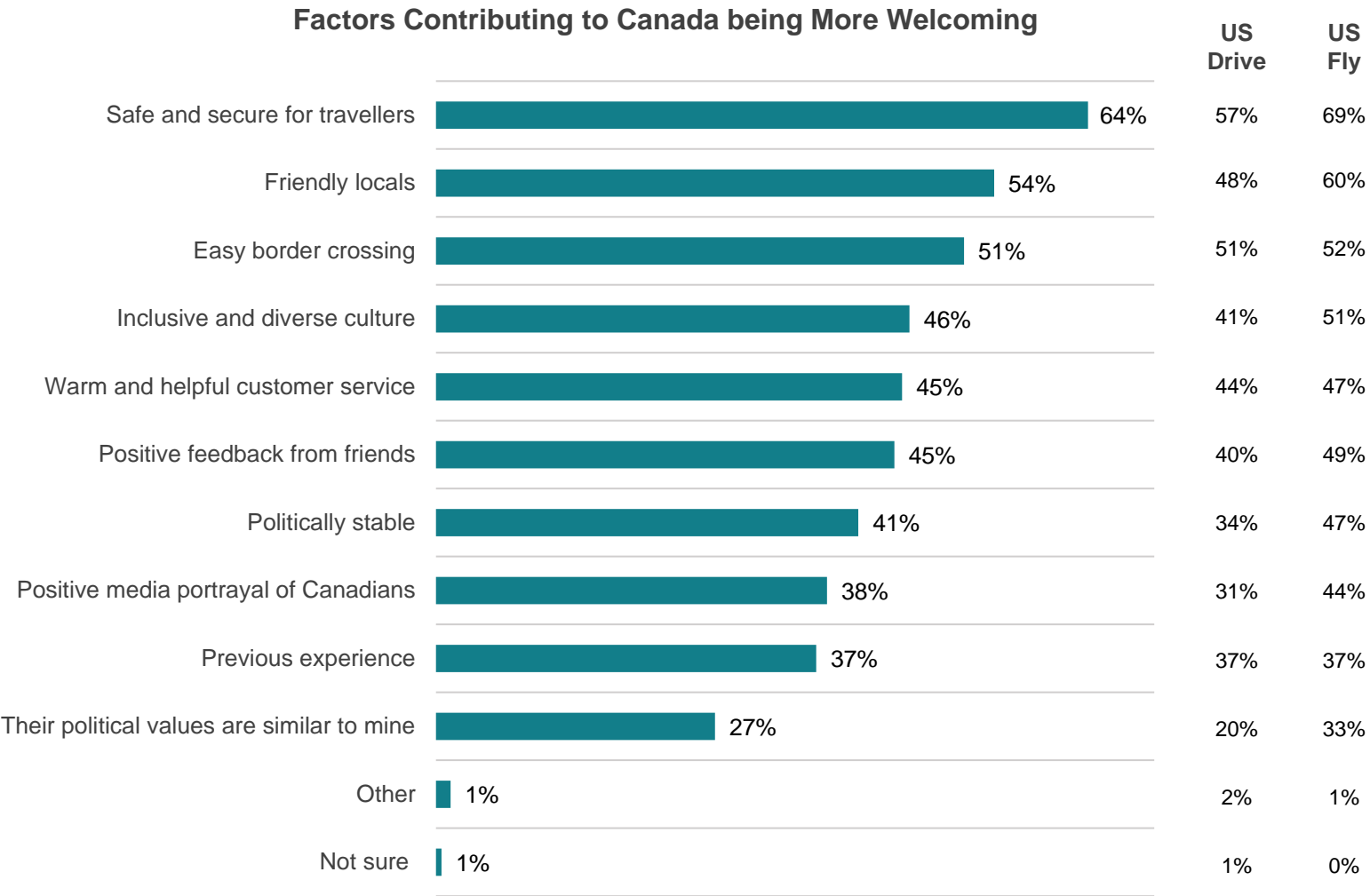
CANADA MORE WELCOMING TO US VISITORS

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%).



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

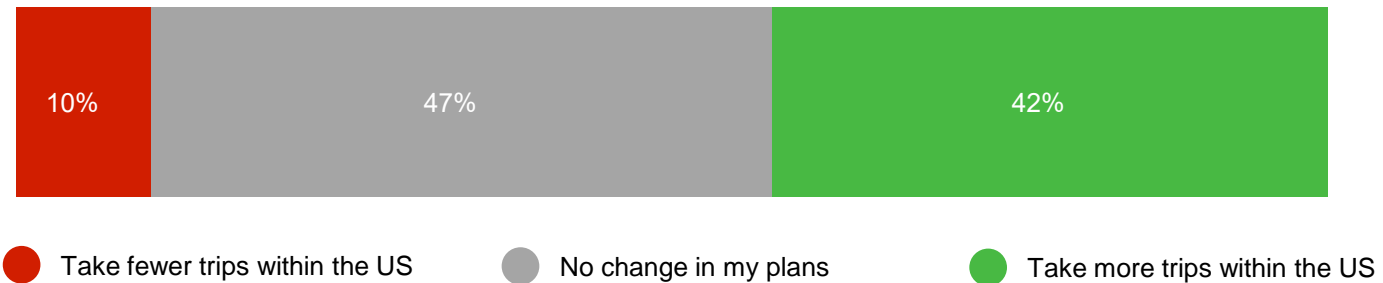
DOMESTIC AND INTERNATIONAL TRAVEL PLANS

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.

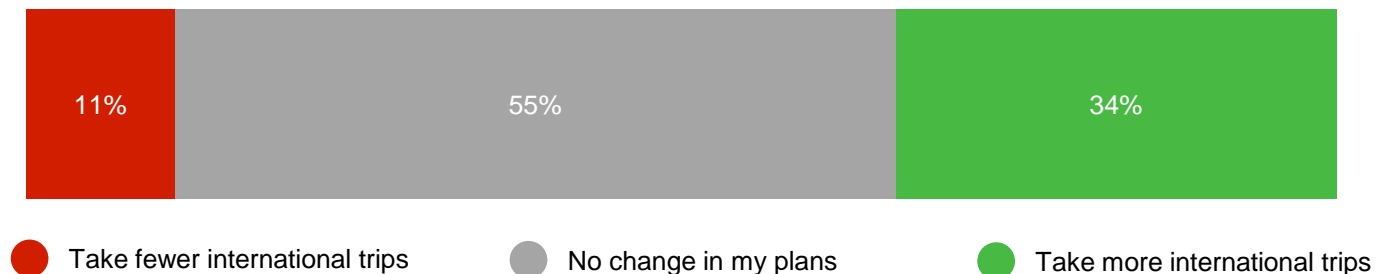
Half of the respondents say they are not changing their international travel plans for the next 12 months, while one-third plan to take more international trips.

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%).

Travel Plans Within the US for the Next 12 Months



International Travel Plans for the Next 12 Months



T1A. Which of the following best describes your domestic travel plans in the next 12 months?

All respondents. n=1610

T1B. Which of the following best describes your international travel plans in the next 12 months?

All respondents. n=1610

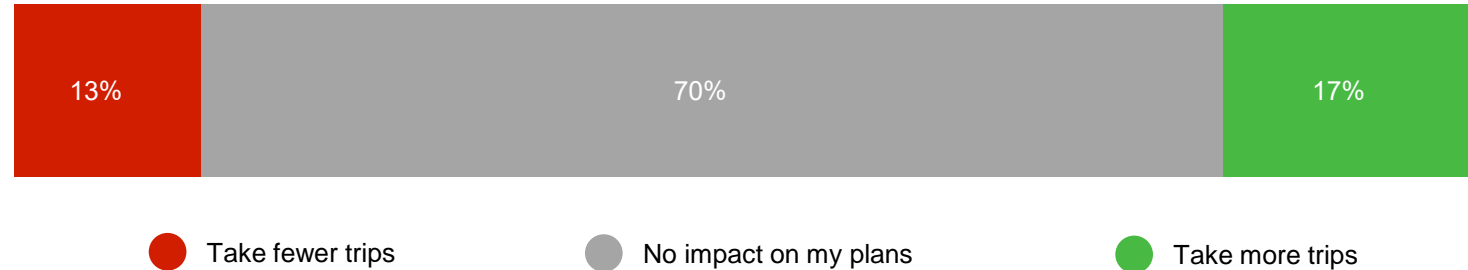
The US Presidential election appears to have no major impact on the international travel plans of respondents over the next 12 months.

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.

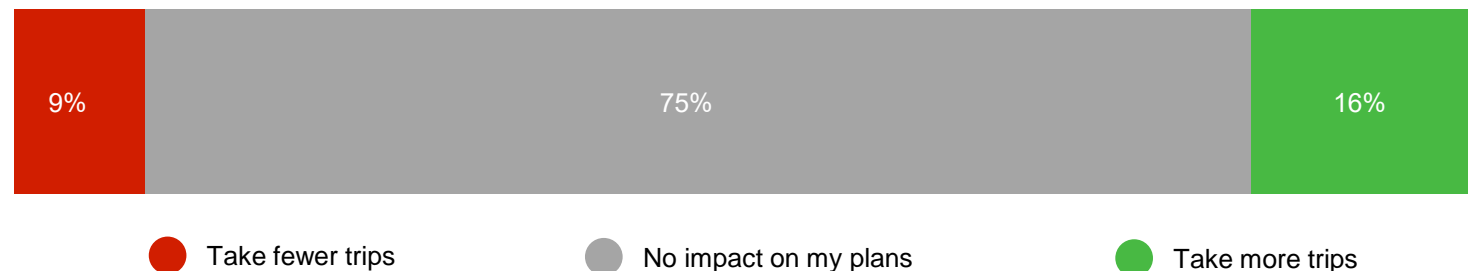
The majority of respondents (75%) indicate that political news or commentary does not impact their travel plans to Ontario.

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 Presidential Election on Travel Plans



Impact of Political News or Commentary



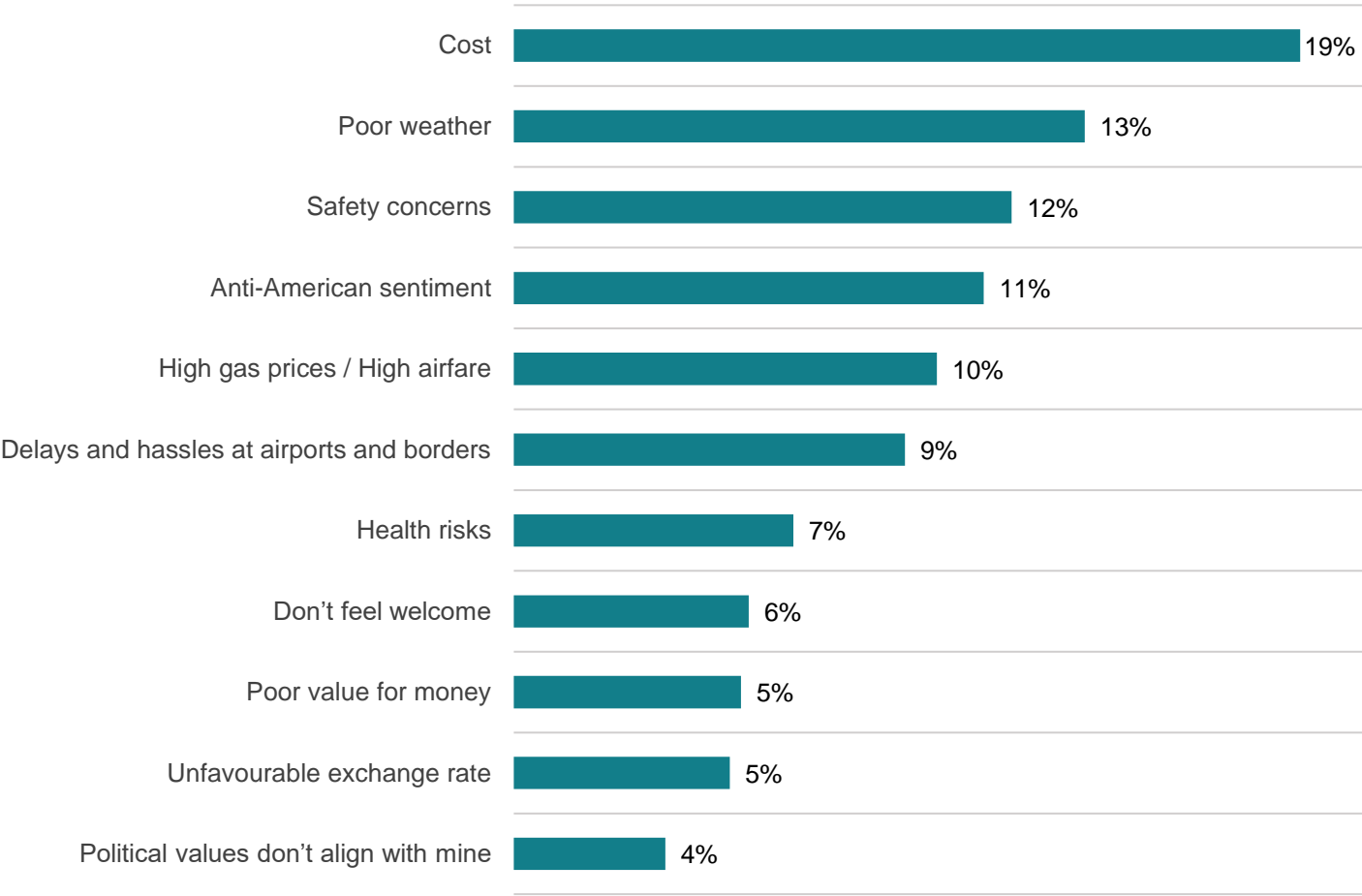
13. How did the outcome of the recent Presidential election influence your international travel plans in the next 12 months?
All respondents. n=1610

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

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)

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%

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)

Cost is the top priority for travellers when deciding whether to visit Ontario. **Exchange rates are the strongest driver of travel intent**, reinforcing the significance of affordability in decision-making.

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.

US Drive Market

- highlight the **ease and convenience of visiting Ontario**.
- address and dispel concerns about border hassles, emphasizing that entry requirements are straightforward and hassle-free.
- position Ontario as an easy and accessible getaway destination, perfect for weekend trips, family outings, and spontaneous visits.

US Fly Market

- focus on Ontario's **welcoming and inclusive atmosphere**.
- reinforce that visitors from the US are valued and appreciated.