CONTEXT IS EVERYTHING

ONTARIO TRAVEL & TOURISM MONTHLY SUMMARY INSIGHTS

July 2025

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CONTEXT IS EVERYTHING

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METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:
- Ontario residents and US residents from the Drive (Michigan, Ohio, Upstate NY) and Fly (NYC, Chicago) markets (see the next slide for details)
- 25 to 64 years of age
- Planning to take a pleasure trip in the next 12 months or have taken a pleasure trip in the past 12 months
- Minimum HH income of $100K for US Fly

Sample Size:
- Total: n=997
- Ontario: n=499
- US Drive: n=250
- US Fly: n=249

Fieldwork Date:
- July 22nd, 2025 – July 30th, 2025

Median Length of Interview:
- 8.3 minutes

Margin of Error:
- Ontario: ± 4.4%
- US Drive: ± 6.2%
- US Fly: ± 6.2%

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

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%.

Top 2 / Bottom 2:
In some cases, results are presented as Top 2 (TOP2) or Bottom 2 (BTM2) scores, which group the top two and bottom two points of a scale, respectively, to highlight overall positive or negative sentiment.

TERMINOLOGY – US DRIVE & FLY MARKETS

US Drive Market
Refers to U.S. travellers who are likely to drive to Ontario, typically originating from nearby border states.

For this study, the US Drive markets include:

- Michigan: Detroit, Ann Arbor, Lansing
- New York: Albany, Rochester, Syracuse, Buffalo
- Ohio: Cleveland, Toledo

US Fly Market
Refers to U.S. travellers who are more likely to fly to Ontario, due to longer travel distances.

For this study, the US Fly markets include:

- Chicago
- New York City

ONTARIO TRAVEL & TOURISM MONTHLY (OTTM)

What is OTTM?

Ontario Travel & Tourism Monthly (OTTM) is an ongoing study provided by **CRG**, providing monthly insights into Ontario’s tourism landscape. The OTTM goes beyond surface-level travel metrics to explore what typical travellers to Ontario are really thinking, including their views on economics, politics, safety, climate, AI usage, and more.

Each month, **1,000 travellers** from across Ontario and key U.S. Drive and Fly markets are surveyed, offering reliable insights into traveller **behaviour and sentiment**.

OTTM will help destinations and businesses to make faster, smarter decisions by providing timely data, not delayed national averages or lagging reports that miss the mark, so you can act before those shifts start impacting your bottom line

And this is just the beginning. As more data accumulates over time, **emerging trends will become clearer**, making OTTM an even more powerful tool to help the travel industry stay informed and stay ahead.

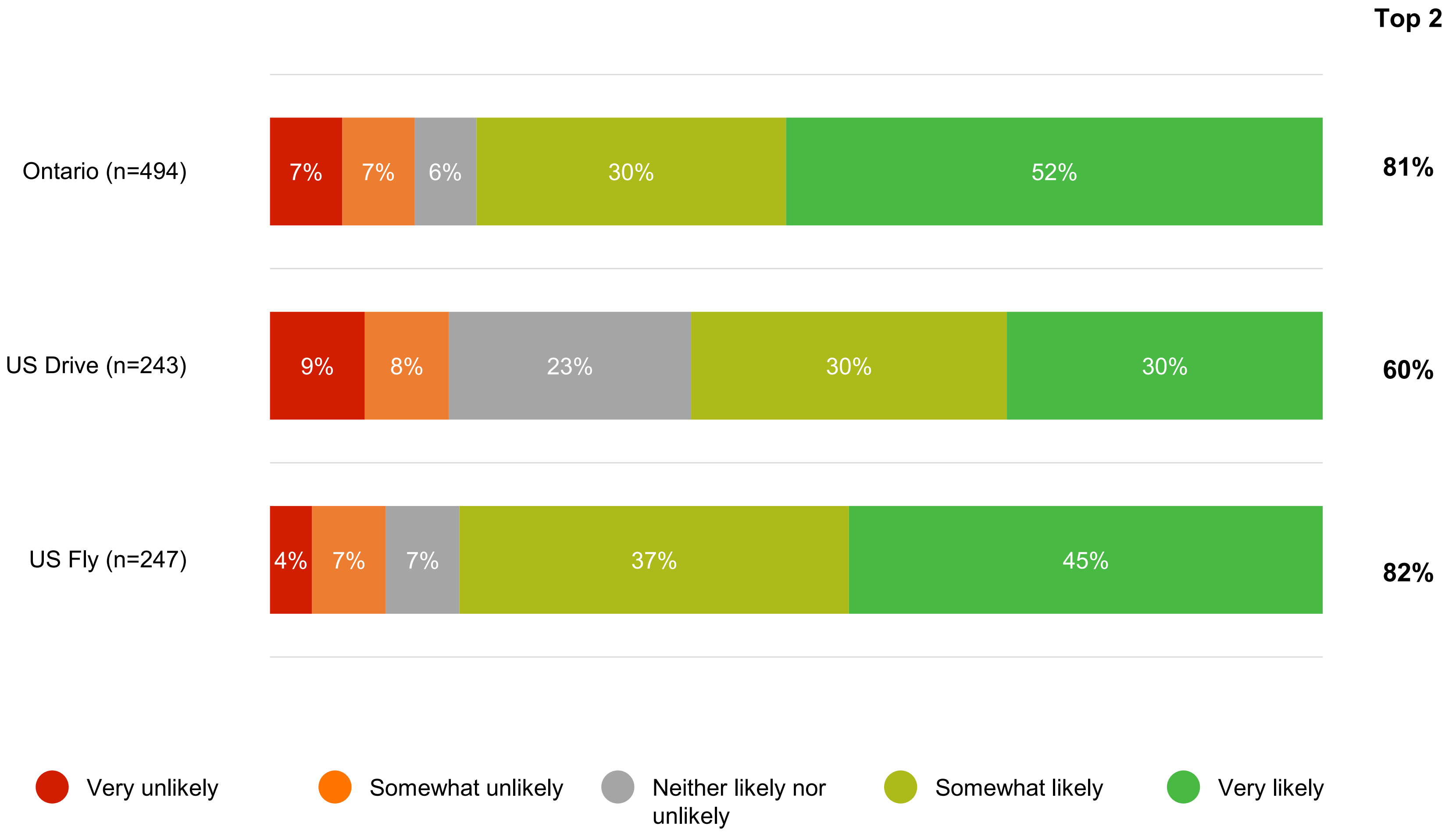
To learn more about OTTM, visit: https://www.crg.ca/ontario-travel-tourism-monthly

TRAVEL DESTINATION PLANS

LIKELIHOOD OF TRAVELLING IN ONTARIO

Four-fifths of both the Ontario and US Fly markets were more likely to take an overnight trip to/in Ontario, while three-fifths of the US Drive market stating their likelihood.

Respondents with children under 18 living in their households are more likely to take a pleasure trip to/in Ontario in the next 12 months.



S5. In the next 12 months, how likely are you to take a pleasure trip of one or more nights in Ontario, Canada? (5-point scale)
All respondents.

TRAVEL PLANS IN ONTARIO – NEXT 12 MONTHS

In the next 12 months, respondents are planning to take on average 1.6 overnight trips and 2.6 day trips in Ontario.

High value overnight US Fly guests are dominating compared to the other markets as they plan to take on average 1.9 trips.

Respondents with children under 18 and those 34-44 years old are planning to take more overnight trips, with an average of 1.9.

Regarding day trips, the Ontario market has planned on average 3.4 trips around the province in the next 12 months.

A deeper look reveals, Central Ontario is more likely to plan more day trips with an average of 6.4.

	ALL	ON	US DRIVE	US FLY
Overall	4.2	5.1	2.0	1.9
Overnight Trips	1.6	1.7	1.0	1.9
Day Trips	2.6	3.4	1.0	-

S6/S9. In the next 12 months how many pleasure trips of one or more nights away from home are you planning to take in Ontario, Canada?/ In the next 12 months, how many day trips are you planning to take in Ontario, Canada? (Numeric)
All respondents. S6 n=997
Respondents from Ontario and US Drive. S9 n=757

TRAVELS PLANNED IN ONTARIO – PAST 12 MONTHS

In the past 12 months, respondents planned on average 1.1 overnight trips and 2.5 day trips in Ontario.

The Ontario market has taken the most overnight and day trips within the province.

In terms of overnight trips, Toronto – GTA (1.4), Central (1.6), and Eastern Ontario (1.8) reported to have taken more trips compared to the other Ontario regions and US markets.

Overall, those with children in the household have taken more trips than those who do not, with an average of 1.3.

Central Ontario shared an average of 4.5 day trips, making it the region with the most visits.

	ALL	ON	US DRIVE	US FLY
Overall	3.6	5.0	1.0	1.0
Overnight Trips	1.1	1.5	0.5	1.0
Day Trips	2.5	3.5	0.5	-

S8A/S10. In the past 12 months how many pleasure trips of one or more nights away from home have you taken in Ontario, Canada?/In the past 12 months, how many day trips have you taken in Ontario, Canada? (Numeric)
All respondents. S8A n=997
Respondents from Ontario and US Drive. S10 n=757

PLANNED MONTHS OF TRAVEL - OVERALL

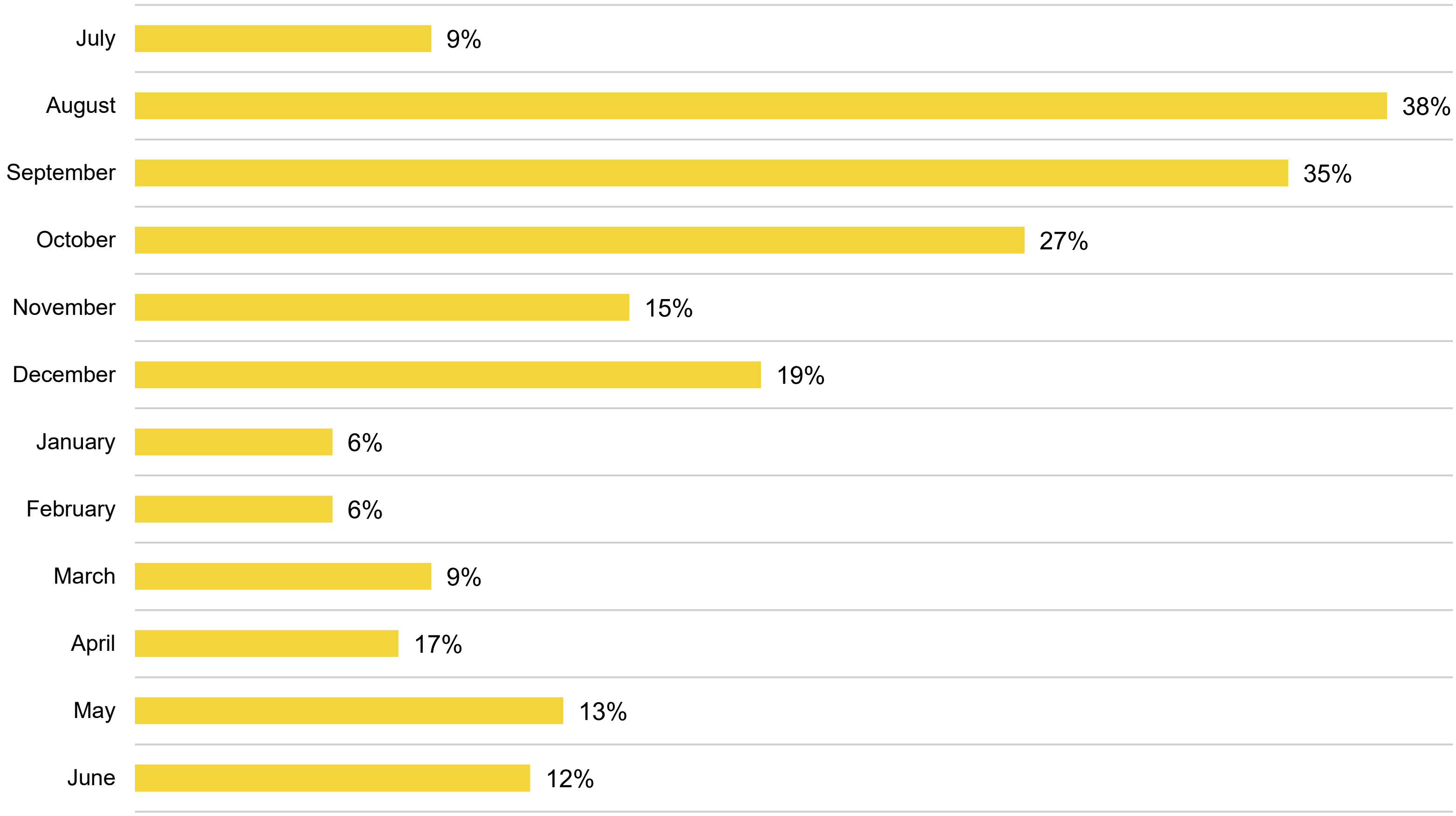
The upcoming months respondents have most likely planned a pleasure trip to Ontario are August and September 2025.

Those who have children under the age of 18 tend to have a trip planned for November, December, and January.

This suggests that families are planning to meet during the holiday season to share quality time.

With the upcoming reports, we could see an increased interest for later months.

*Please note, this study was conducted during early to mid July, hence its' small percentage. Future waves should balance out, nonetheless it still shows the last-minute trip planning for the remainder of the month.



S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Single-Select) (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=720)

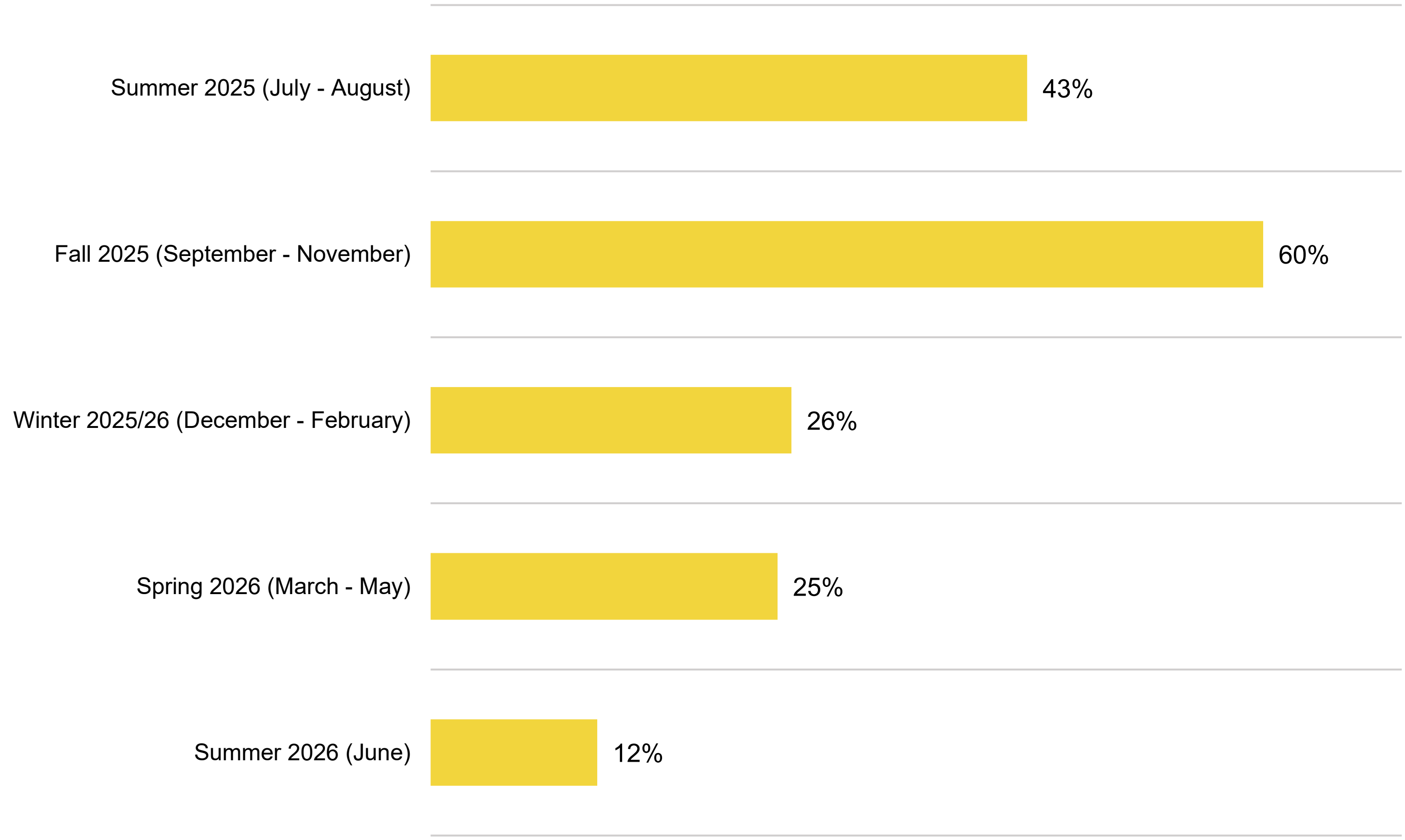
PLANNED MONTHS OF TRAVEL - OVERALL

Overall, three in five respondents are thinking about planning a pleasure trip to Ontario during the Fall of 2025.

There is still an overall interest on taking a trip for the remainder of the Summer season, with two in five respondents expressing this.

Furthermore, a quarter of respondents are starting to think about planning a trip to Ontario for the Winter and Spring seasons.

As well, BIPOC respondents are more likely to plan for a trip during Summer 2025 compared to Caucasian respondents.



S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Single-Select) (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=720)

PLANNED MONTHS OF TRAVEL - ONTARIO

Half of Ontario respondents are planning to travel within the province during August 2025.

Within the Ontario market, Toronto – GTA is more likely to have a trip planned in August.

As of right now, it seems that the Ontario respondents are not planning to travel for the early months of next year.

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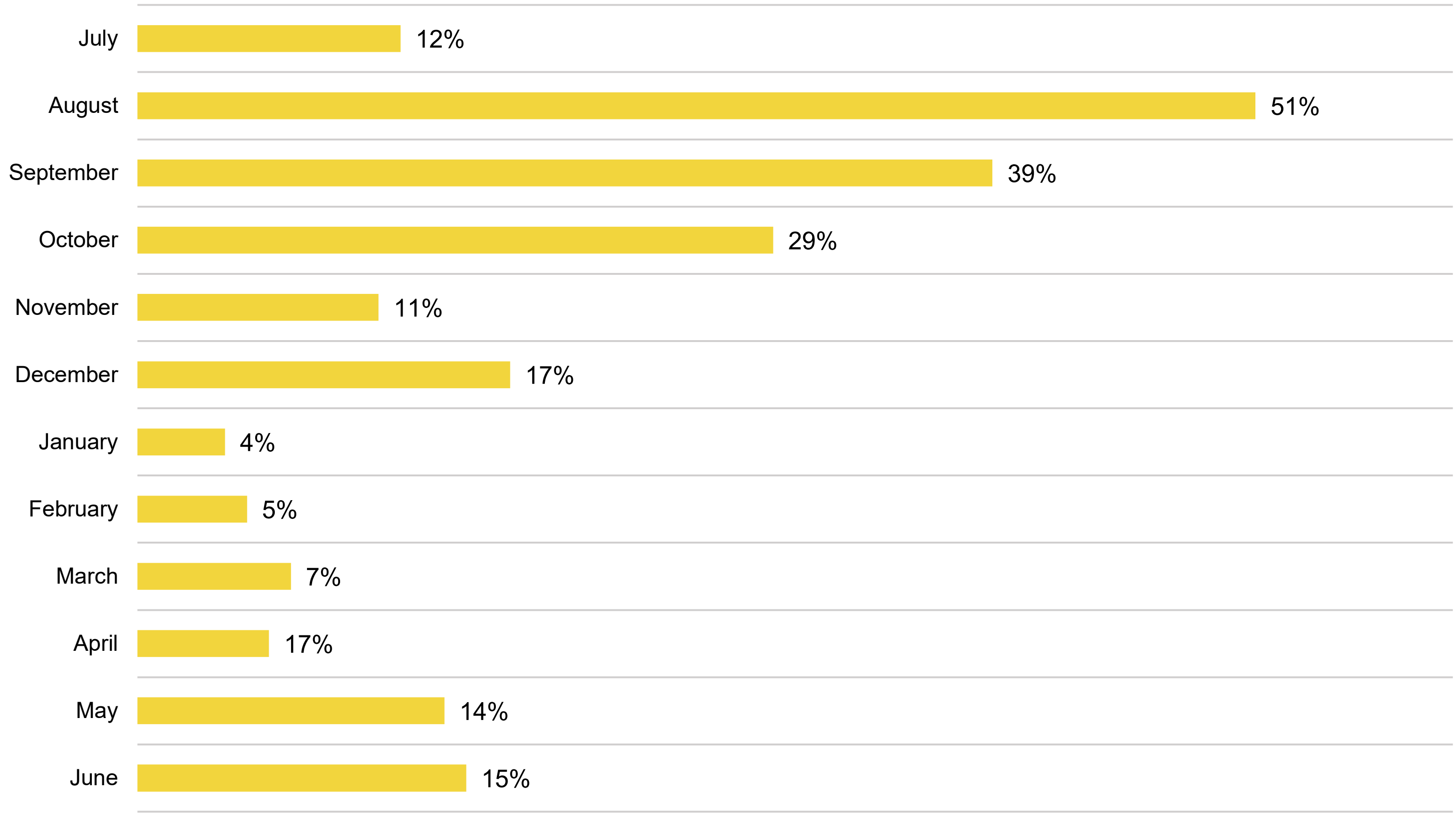
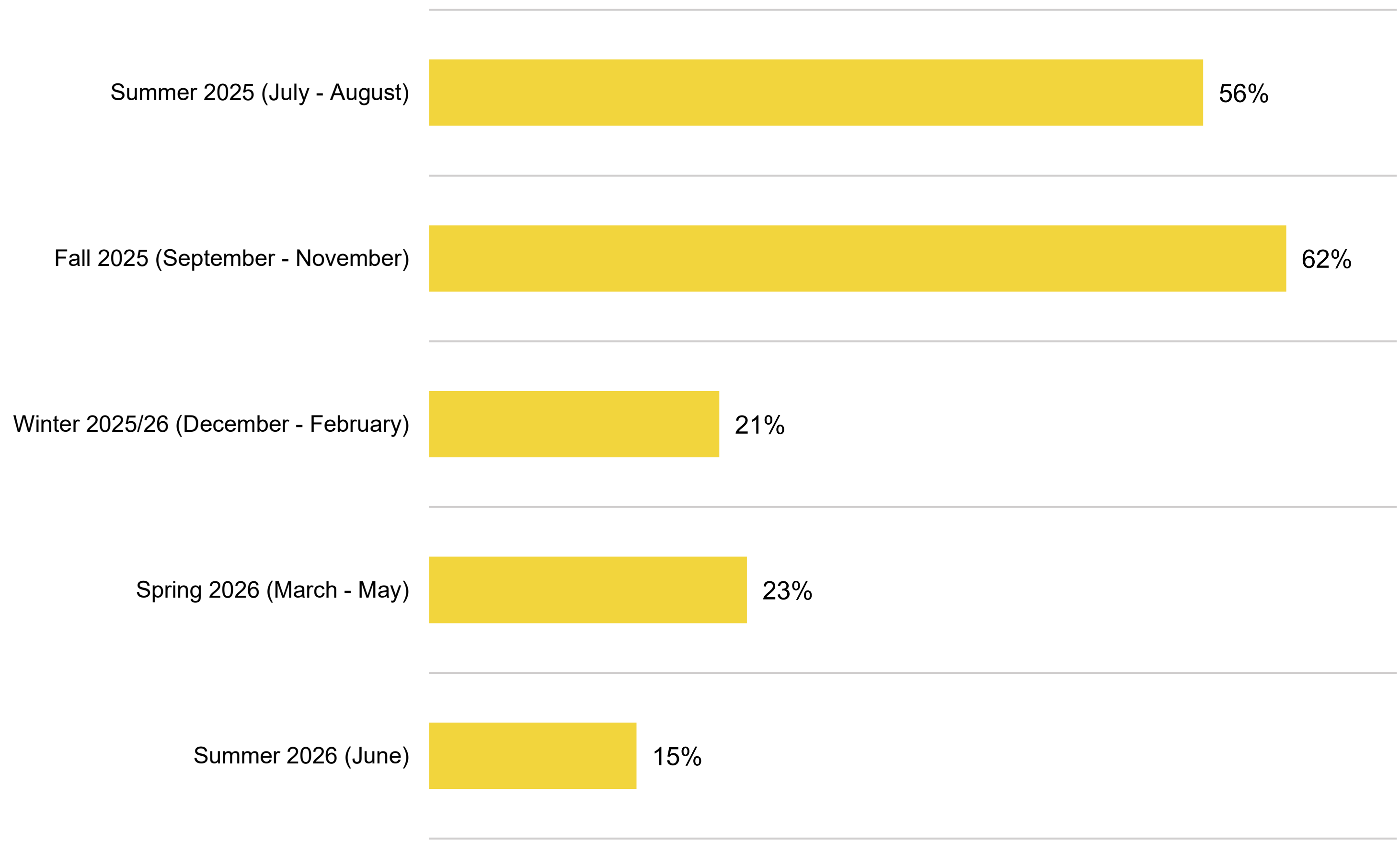


S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Single-Select) (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=377)

PLANNED MONTHS OF TRAVEL - ONTARIO

Around three in five Ontario respondents are thinking to plan a trip within the Summer and Fall seasons of 2025.

This may be due to the proximity of those seasons, whereas Winter 2025/26 and Spring and Summer 2026 are farther off. Living in Ontario, travellers may find it easier to plan trips closer to the season or even last minute.



S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Single-Select) (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=377)

PLANNED MONTHS OF TRAVEL – US DRIVE

More than one in four US Drive respondents stated they are thinking about planning a trip to Ontario for September and October 2025.

There are as much US Drive respondents thinking about a trip for August (21%) as there are for the top months.

There may be more interest during September and October to participate in fall activities and possibly to see family for Thanksgiving.

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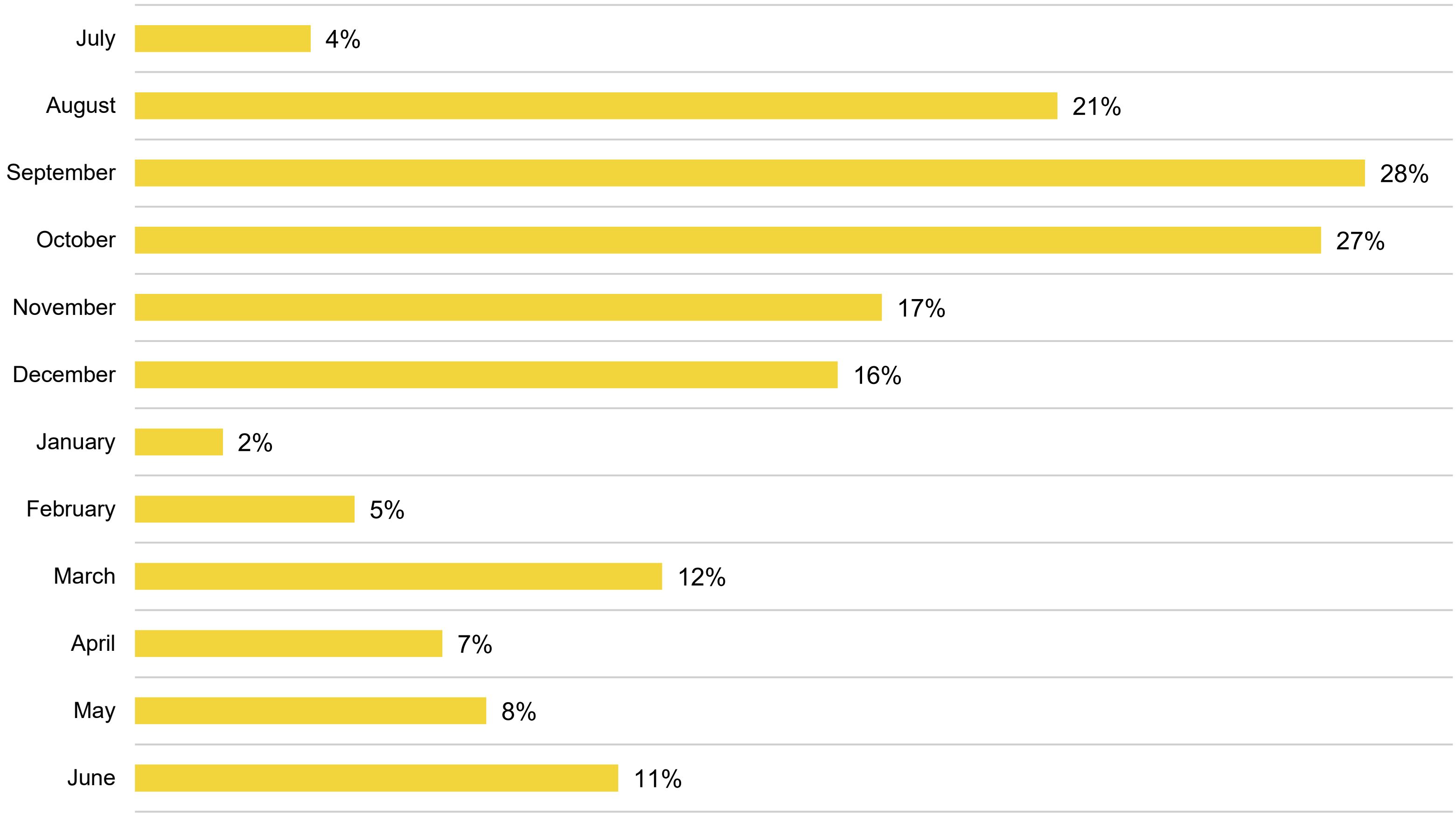
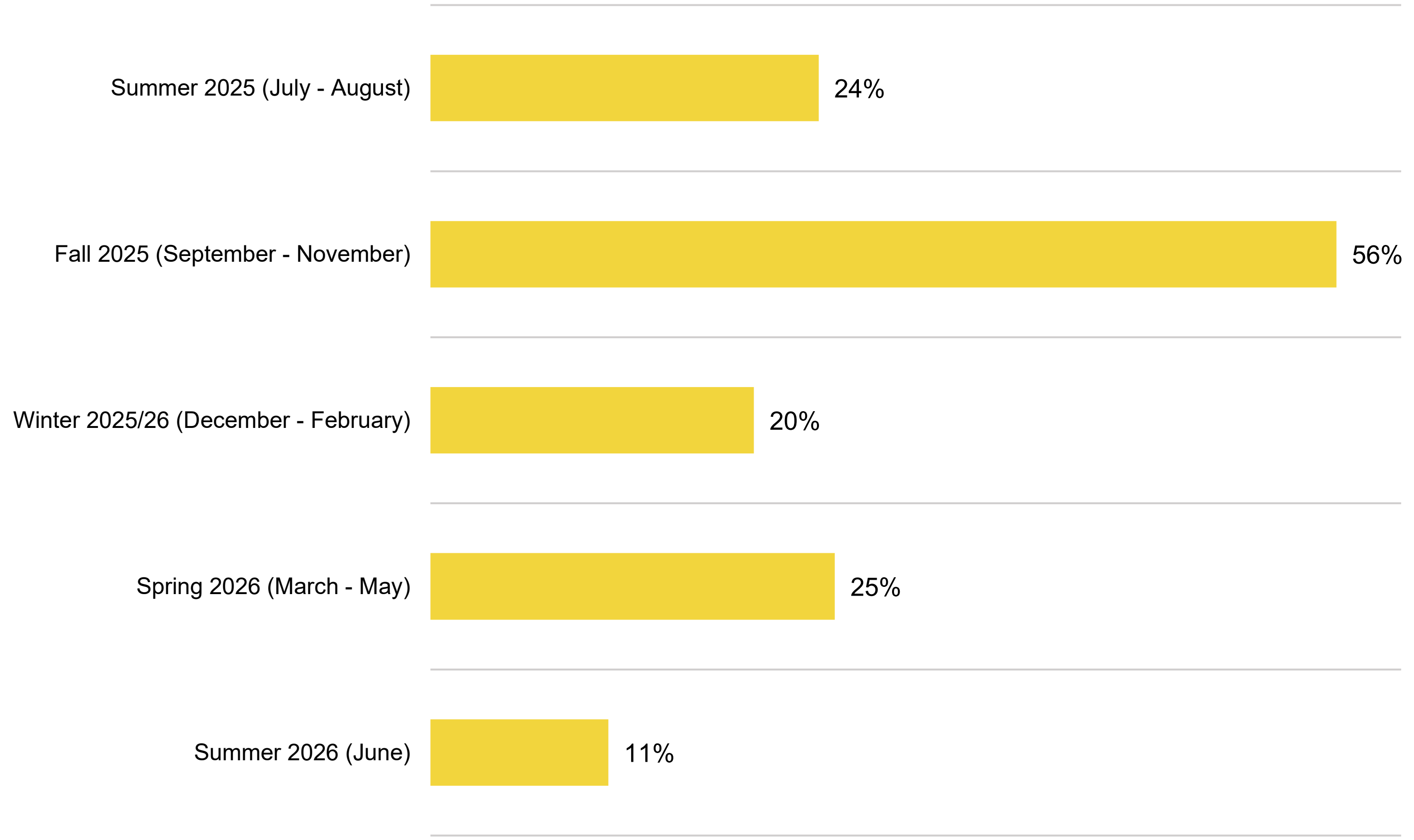


S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Single-Select) (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=141)

PLANNED MONTHS OF TRAVEL – US DRIVE

More than half of the US Drive respondents are thinking about planning a pleasure trip to Ontario during the Fall of 2025.

This aligns with the findings of US Drive thinking about planning an Ontario trip mainly in September and October.



S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Single-Select) (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=141)

PLANNED MONTHS OF TRAVEL – US FLY

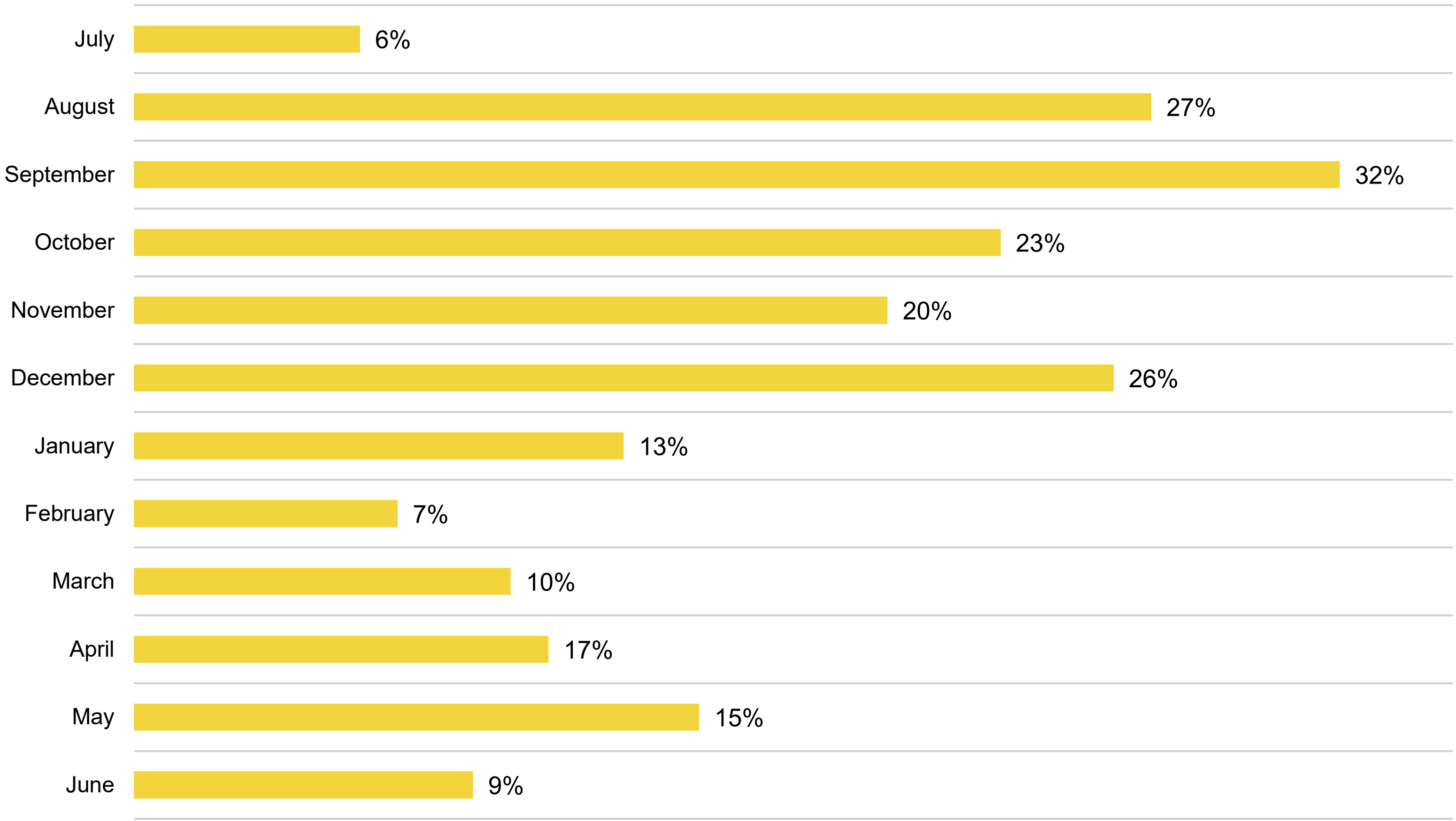
Around one-third of US Fly respondents are thinking about September 2025 being the month to travel to Ontario, followed by August and December 2025 as one-fourth stated this.

US Fly is thinking about many months to travel as the variation is not too far apart from each other.

Compared to the Ontario market, US Fly is more likely to plan a trip for November and December.

US Fly is also more likely to plan a trip to Ontario for January compared to both markets.

*Please note, this study was conducted during early to mid July, hence its' small percentage. Future waves should balance out, nonetheless it still shows the last-minute trip planning for the remainder of the month.



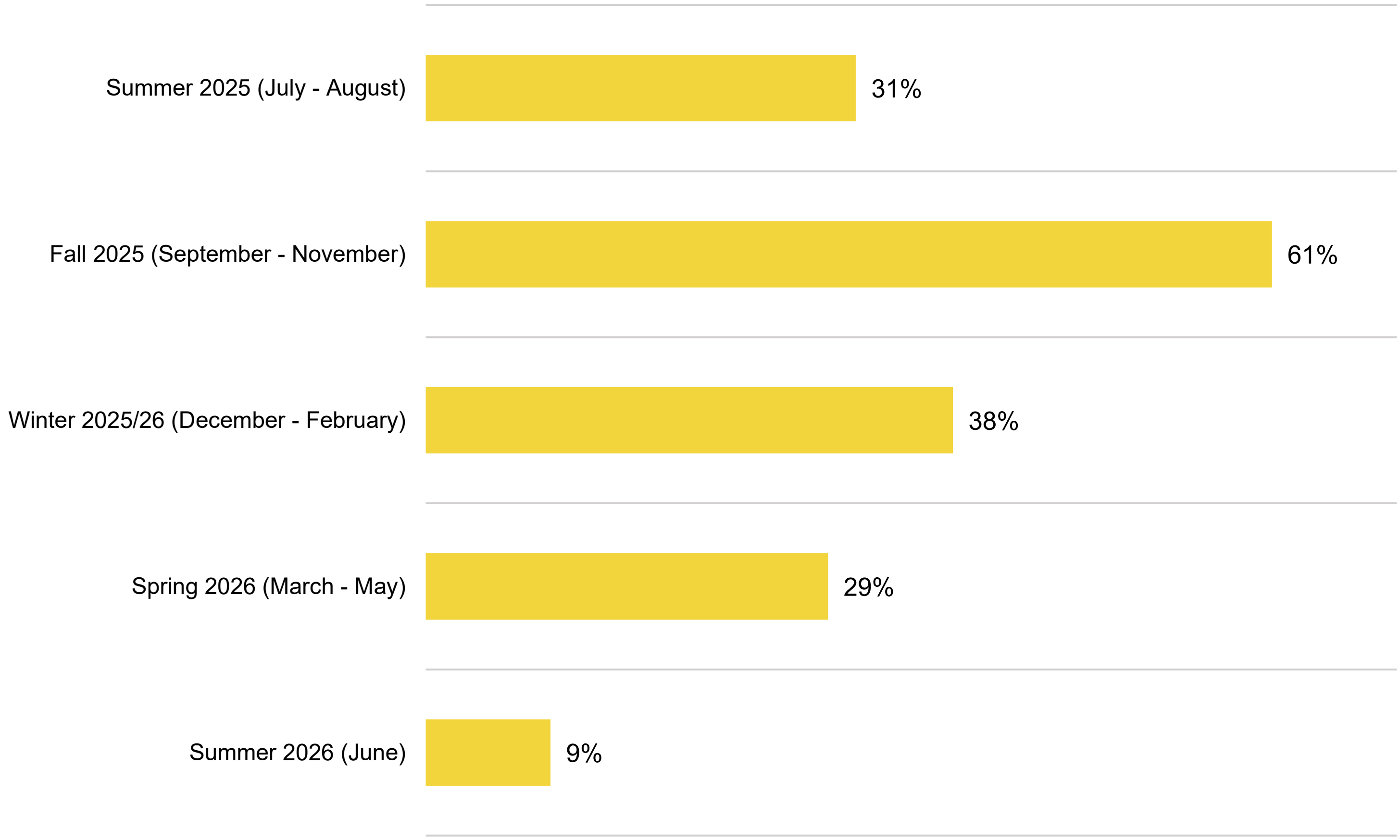
S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Single-Select) (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=202)

PLANNED MONTHS OF TRAVEL – US FLY

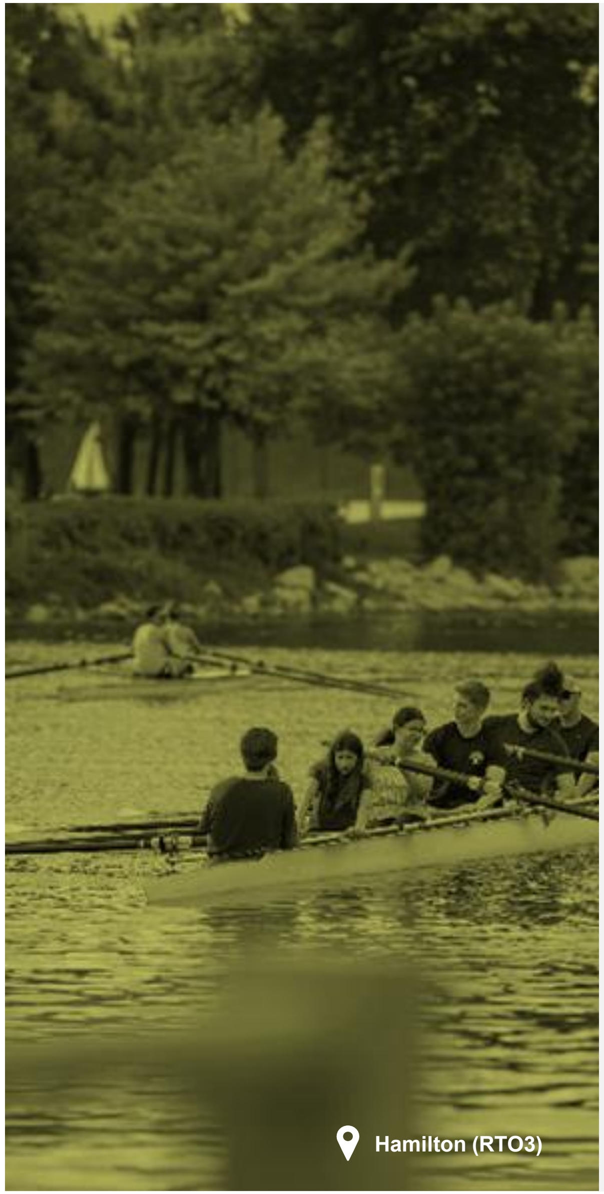
Three-fifths of the US Fly respondents are thinking about planning a pleasure trip to Ontario during the Fall of 2025.

With the exception of Summer 2026, the upcoming seasons show relatively equal interest in travel to Ontario.

Compared to the other markets US Fly is more likely to plan a trip to Ontario during the upcoming Winter season.



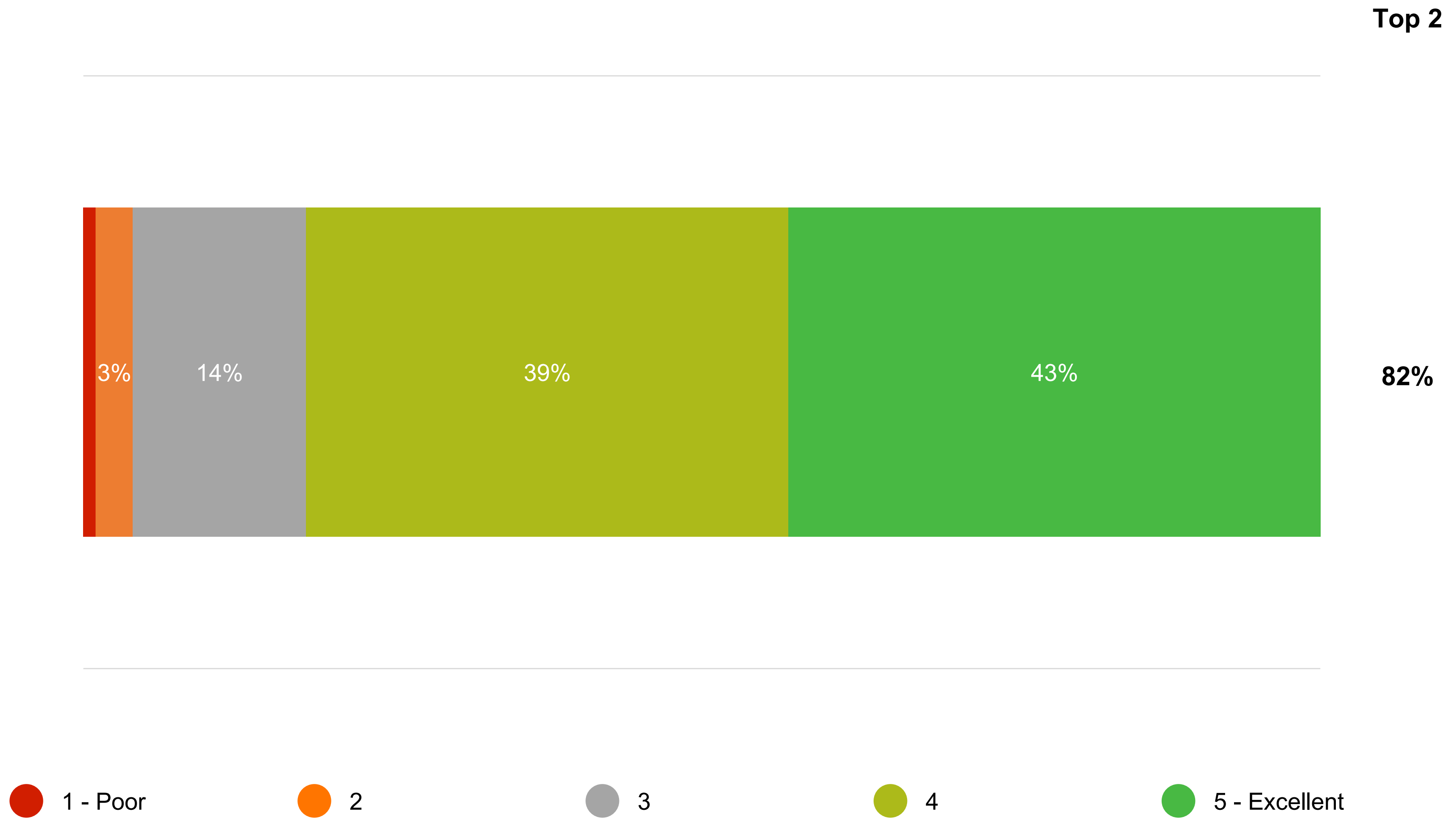
S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Single-Select) (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=202)



BRAND PERCEPTION

ONTARIO AS A PLEASURE TRAVEL DESTINATION

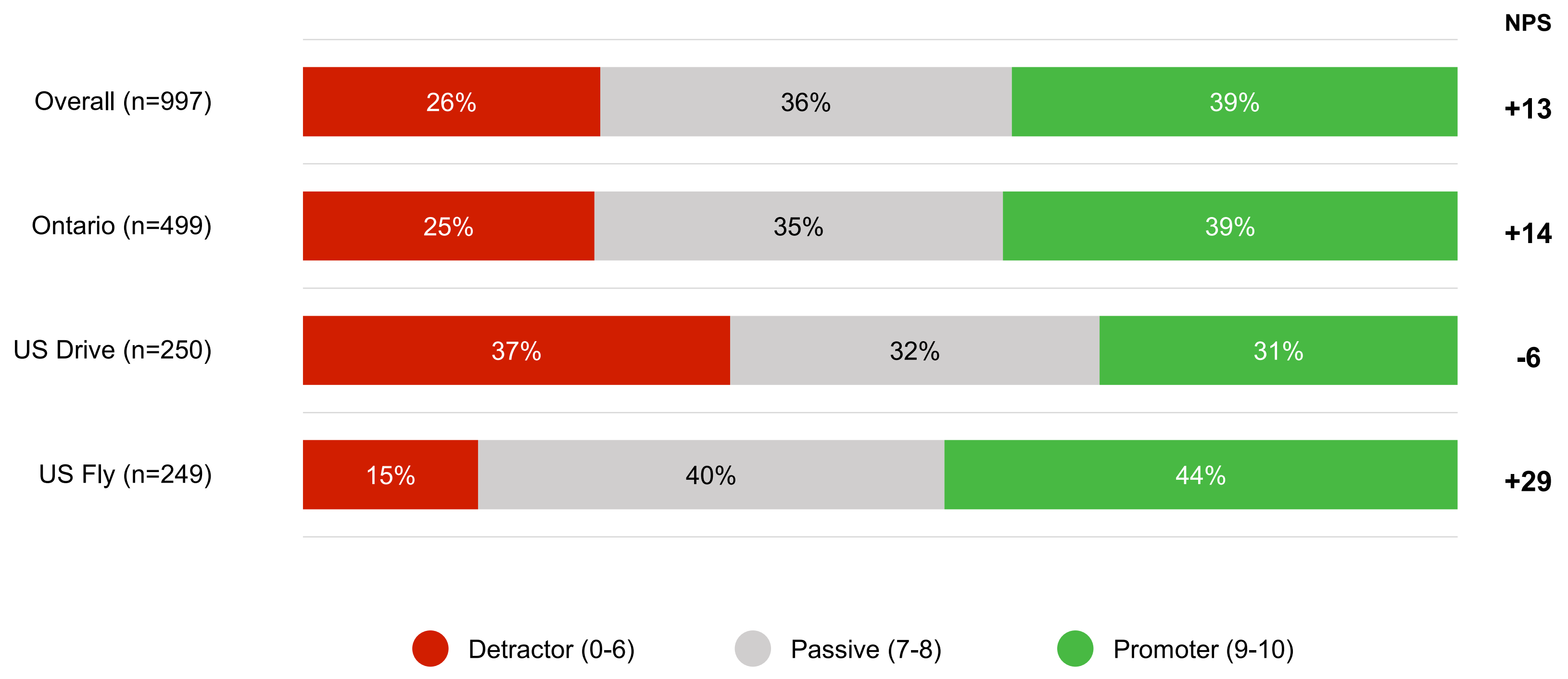
Ontario is highly rated as a pleasure travel destination with four in five respondents sharing this sentiment.



Q3. How would you rate Ontario, Canada as a pleasure travel destination? (5-point scale)
All respondents. n=958

NET PROMOTER SCORE

Overall, there is a likelihood that respondents would recommend Ontario, Canada for a short getaway or vacation (NPS: +13), while US Fly is the more likely market to do so (NPS: +29).



Q4. How likely are you to recommend Ontario, Canada to friends or colleagues as a travel destination for a short getaway or vacation? (11-point scale)
All respondents.

DESTINATION IMAGE OF ONTARIO

Ontario, Canada is seen to have a positive image as a travel destination, with being good for a short trip as the top reason.

Ontario and US Fly are more likely to agree that Ontario provides unique experiences, allows them to recharge, and delivers the main thing they need.

Even though Ontario respondents stated they are more likely to think it is not a real vacation as it's too close to home (41%), this confirms that it is still viewed highly with its residents.

Top 2

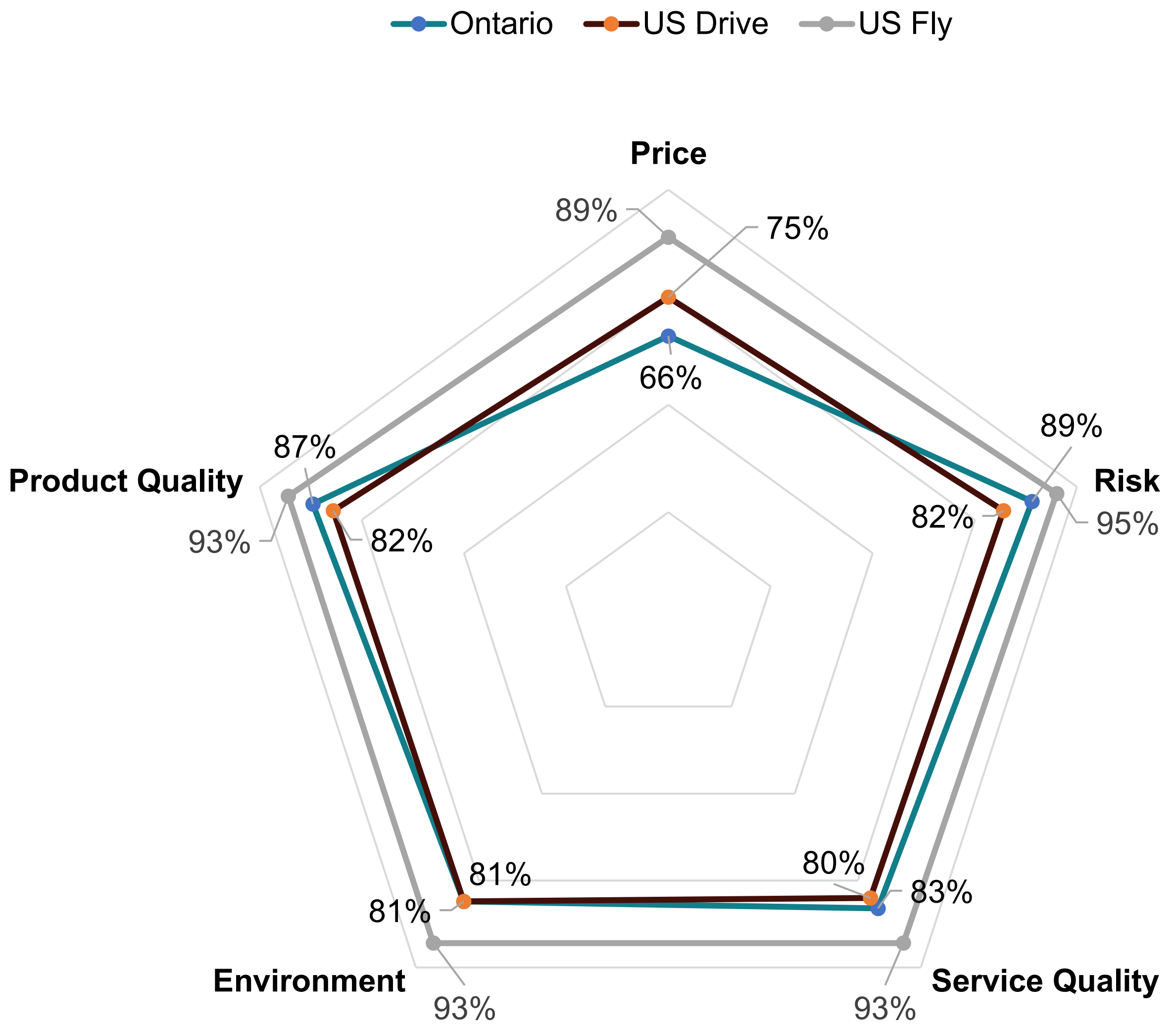
	Is good for a short trip	Provides unique experiences	Allows me to recharge	Is a culturally diverse travel destination	Delivers the main things I need	Doesn't seem like a real vacation because it's so close to home (BTM2)
Overall	88%	86%	83%	81%	81%	51%
Ontario	91%	84%	84%	80%	81%	42%
US Drive	85%	82%	75%	76%	73%	55%
US Fly	84%	93%	90%	87%	87%	66%

Below average ← → Above average

Q5. Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario…? (Excludes "don't know") (5-point scale)
All respondents.

CONSUMER PERCEIVED VALUE OF ONTARIO TRAVEL – SUMMARY

Overall, Ontario is perceived as offering strong value to its travellers.



Q6. Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario…? (Excludes "don't know") (5-point scale)
All respondents.

CONSUMER PERCEIVED VALUE OF ONTARIO TRAVEL – SUMMARY

Ontario is perceived as offering strong value to travellers, primarily due to its natural landscapes, being a safe destination, and ease of travel planning.

The US Fly market is more likely to agree that Ontario has good value for money, destination/customer service, travel infrastructure, and being a safe destination.

Breaking it down, NYC – US Fly is the main reason for those high value perception within the US Fly market, as they are likely to agree on Ontario having good infrastructure (93%), vacation/customer service (94%), and money value (91%).

Lastly, 55-64 years old are more likely to deem Ontario as safe.

**Consumer perceived value is the average of the attributes*

Top 2

	***Consumer Perceived Value**	Has great natural environment /landscape attractions	Is a safe destination for travel	Is easy to plan a trip for	Provides lots of things to do	Is friendly and inclusive to all visitors	Delivers good vacation service or customer service	Has good travel infrastructure	Provides good value for money
Overall	84%	90%	89%	88%	87%	86%	81%	78%	74%
Ontario	82%	90%	89%	87%	87%	87%	78%	71%	66%
US Drive	80%	84%	82%	83%	82%	79%	77%	78%	75%
US Fly	93%	95%	95%	94%	93%	91%	92%	91%	89%

Below average ← → Above average

Q6. Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario…? (Excludes “don’t know”) (5-point scale)
All respondents.

CONSUMER PERCEIVED VALUE OF ONTARIO TRAVEL – SUMMARY

US Drive and US Fly perceives Ontario as a good destination to visit, with three-fourths agreeing there is a favourable exchange rate.

NYC – US Fly is more likely to agree with majority of the statements:

- Favourable exchange rate
- Simple border and entry
- Political values aligning with their personal beliefs

This is seen overall through the US Fly market.

Those who have children in their household under 18 years old are more likely to agree that Ontario is a politically neutral destination.

**Consumer perceived value is the average of the attributes*

Top 2

	***Consumer Perceived Value**	Has a favourable exchange rate	Has simple border and entry requirements	Has political values that align with my personal beliefs	Is a politically neutral destination
Overall	68%	75%	73%	64%	59%
US Drive	59%	69%	63%	52%	51%
US Fly	76%	82%	82%	75%	66%

Below average
Above average

Q6. Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario…? (Excludes "don't know") (5-point scale)
Respondents from the US markets.

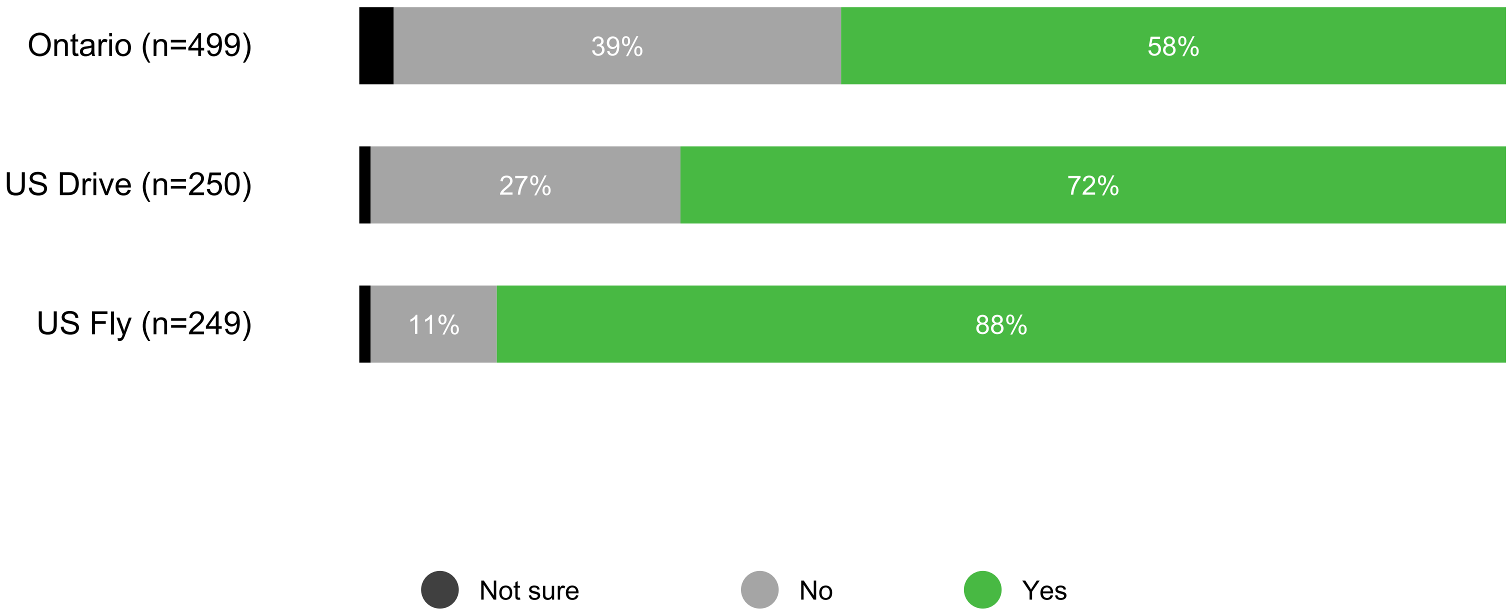
TRAVEL INFORMATION RESEARCH

SEARCHED FOR INFORMATION

All travellers are likely to have looked for information in the past month but US Fly travellers are more likely as more than four-fifth stated.

Overall, more than half of the respondents between all markets have looked into information on travel.

Respondents with children under the age of 18 are more likely to have looked for travel information in the past month, compared to those who don't.



I1. In the past month, have you looked for information about travelling? (Single-select)
All respondents.

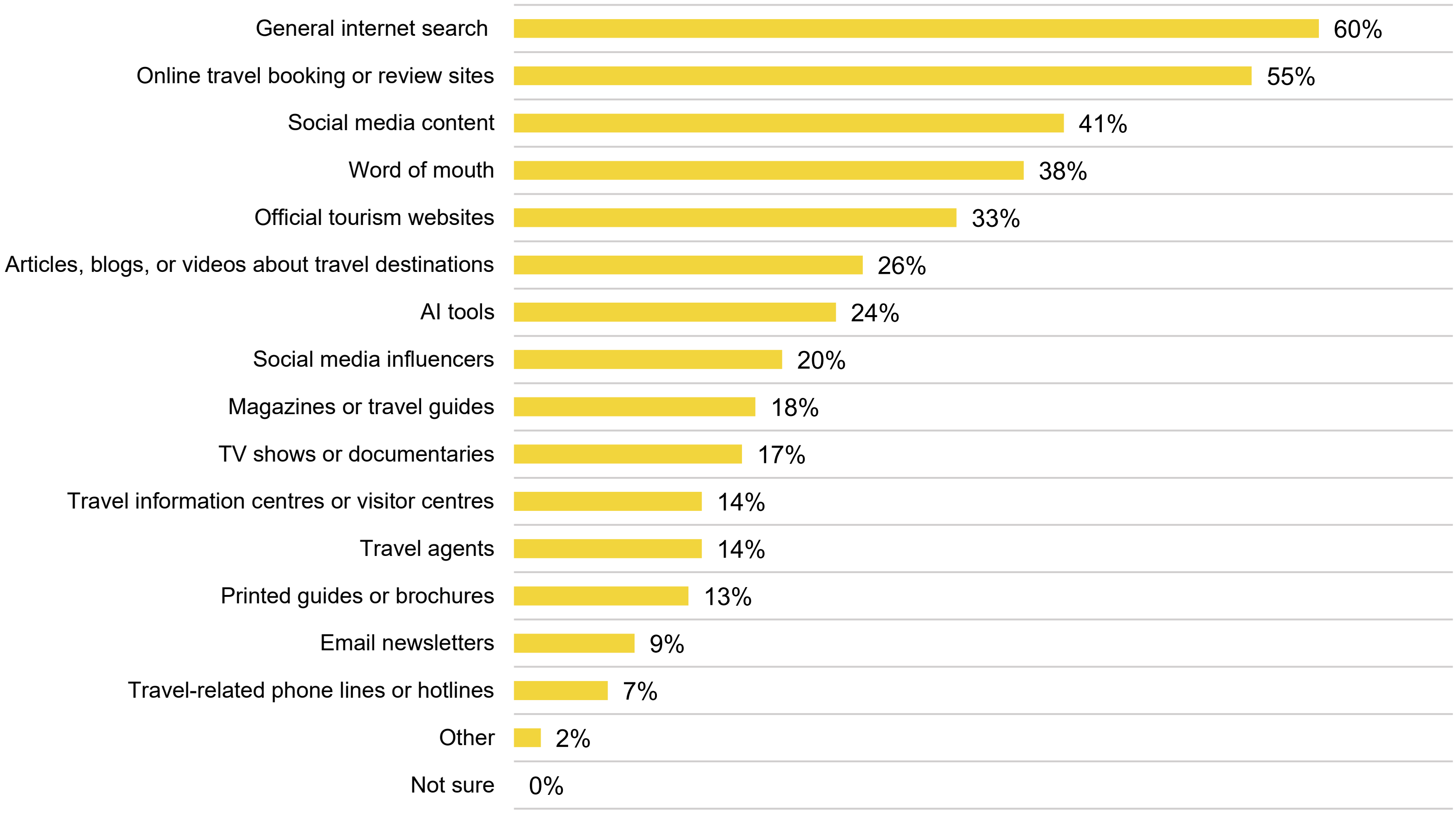
ONTARIO TRAVEL INFORMATION SOURCES - OVERALL

The most used source to obtain information about travelling within Ontario is a general internet search, followed by online travel booking or review sites.

The younger generation shows liking towards using social media content (25-34 years old) and influencers (25-44 years old and those with children under 18) to find travelling information compared to the older generations.

Caucasian respondents and those with no children in the household are more likely to obtain information through word of mouth.

Whereas AI tools are more likely used by respondents with children under 18 and men.



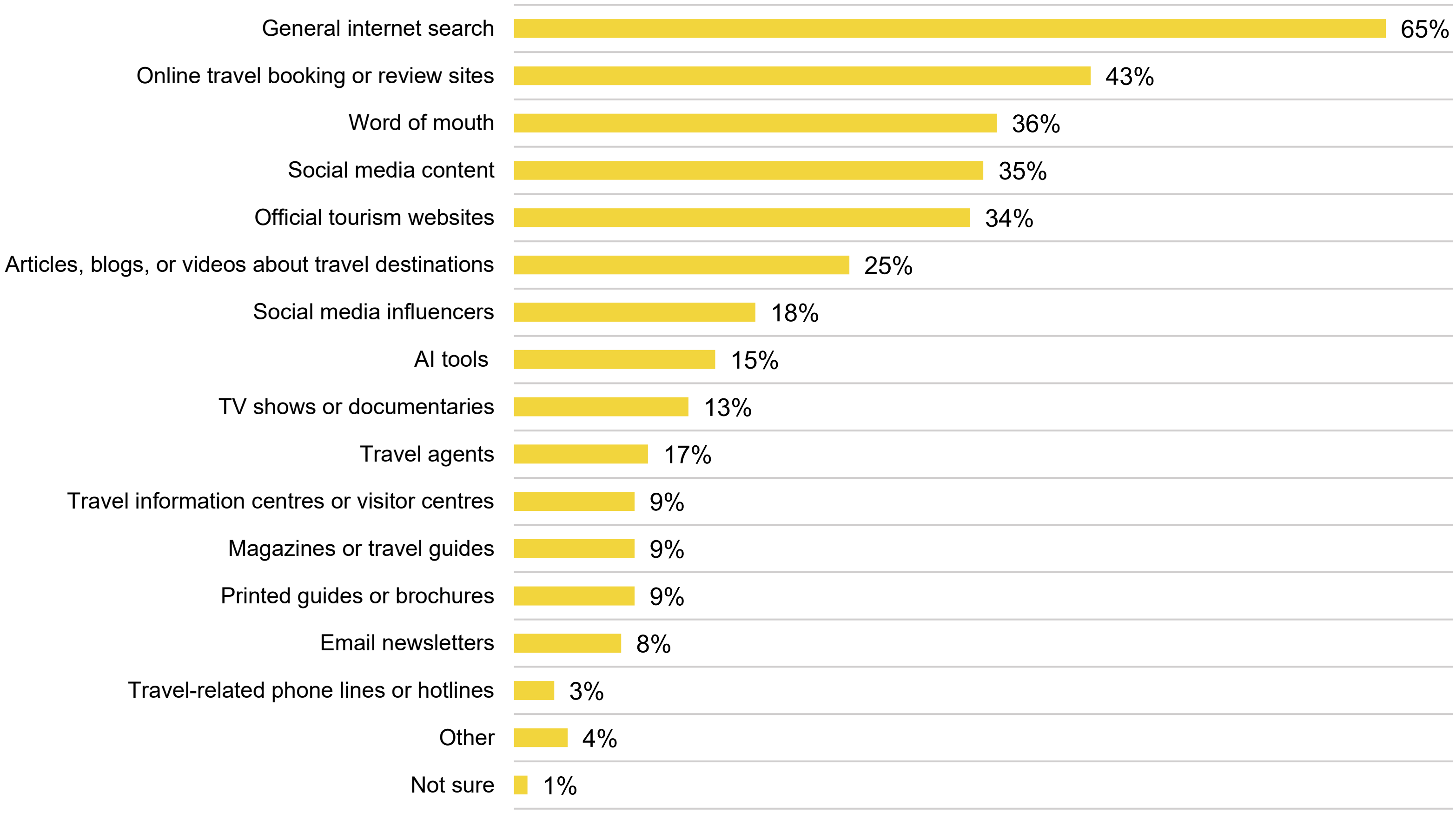
I2. Which of the following sources did you use to obtain information about travelling within Ontario, if any? (Multi-select)
Respondents who have looked for information. (n=685)

ONTARIO TRAVEL INFORMATION SOURCES - ONTARIO

General internet search is by far the most used source to obtain information on Ontario travel among its residents.

Online travel booking or review sites, word of mouth, and social media content being the following sources used shows the need for knowing the firsthand experience of the places within Ontario, even for its residents.

Moreover, Central Ontario is more likely to use general internet search compared to the other regions.



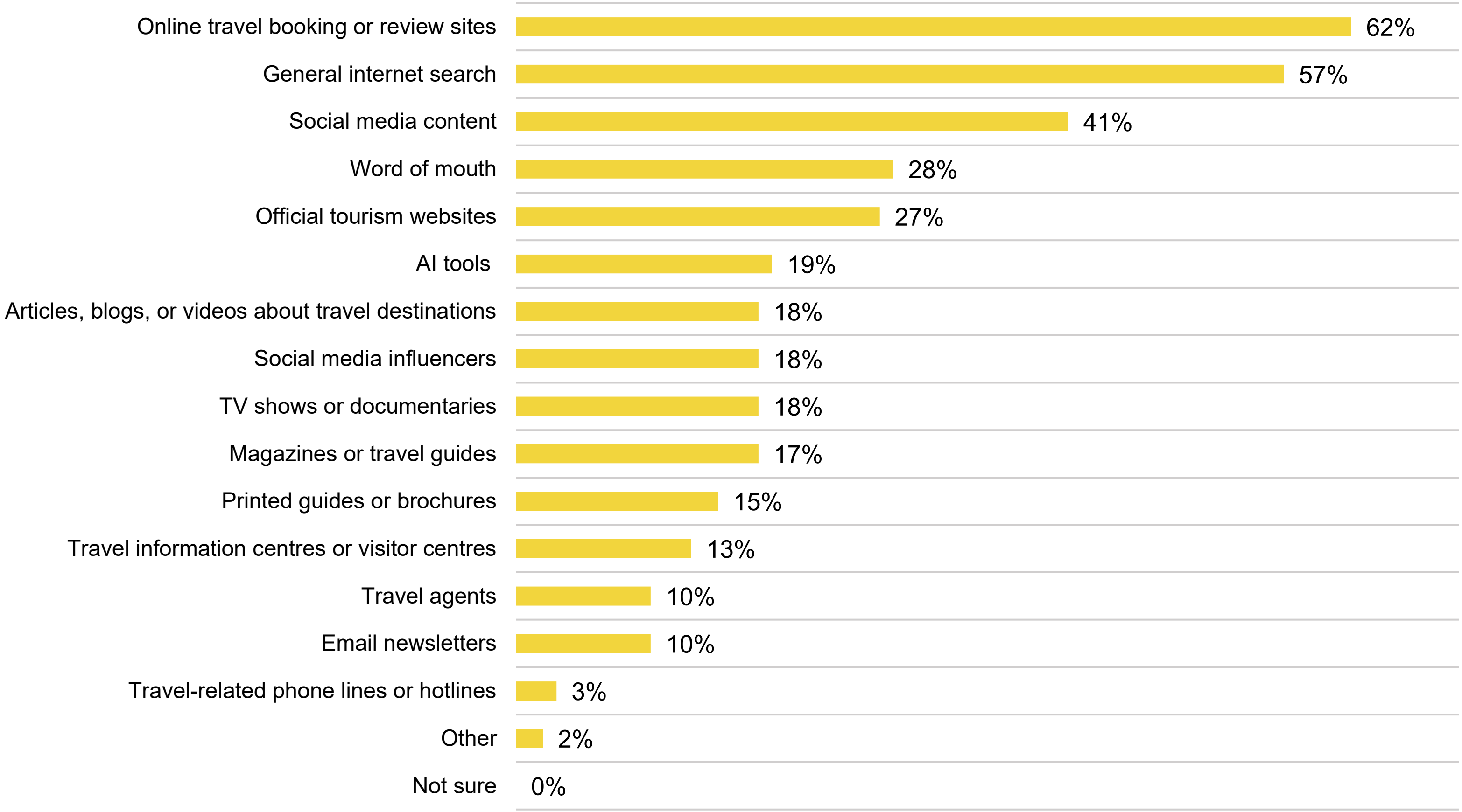
I2. Which of the following sources did you use to obtain information about travelling within Ontario, if any? (Multi-select)
Respondents who have looked for information. (n=287)

ONTARIO TRAVEL INFORMATION SOURCES – US DRIVE

Online travel booking or review sites and general internet searches, were the two most commonly used sources for US Drive respondents to seek Ontario travel information.

Social media content appears particularly helpful for US Drive travellers, ranking noticeably higher than the lower sources listed below and closer to the top sources used.

As well, the US Drive market is more likely to use online travel booking or review sites and magazines or travel guides compared the Ontario market.



I2. Which of the following sources did you use to obtain information about travelling within Ontario, if any? (Multi-select)
Respondents who have looked for information. (n=178)

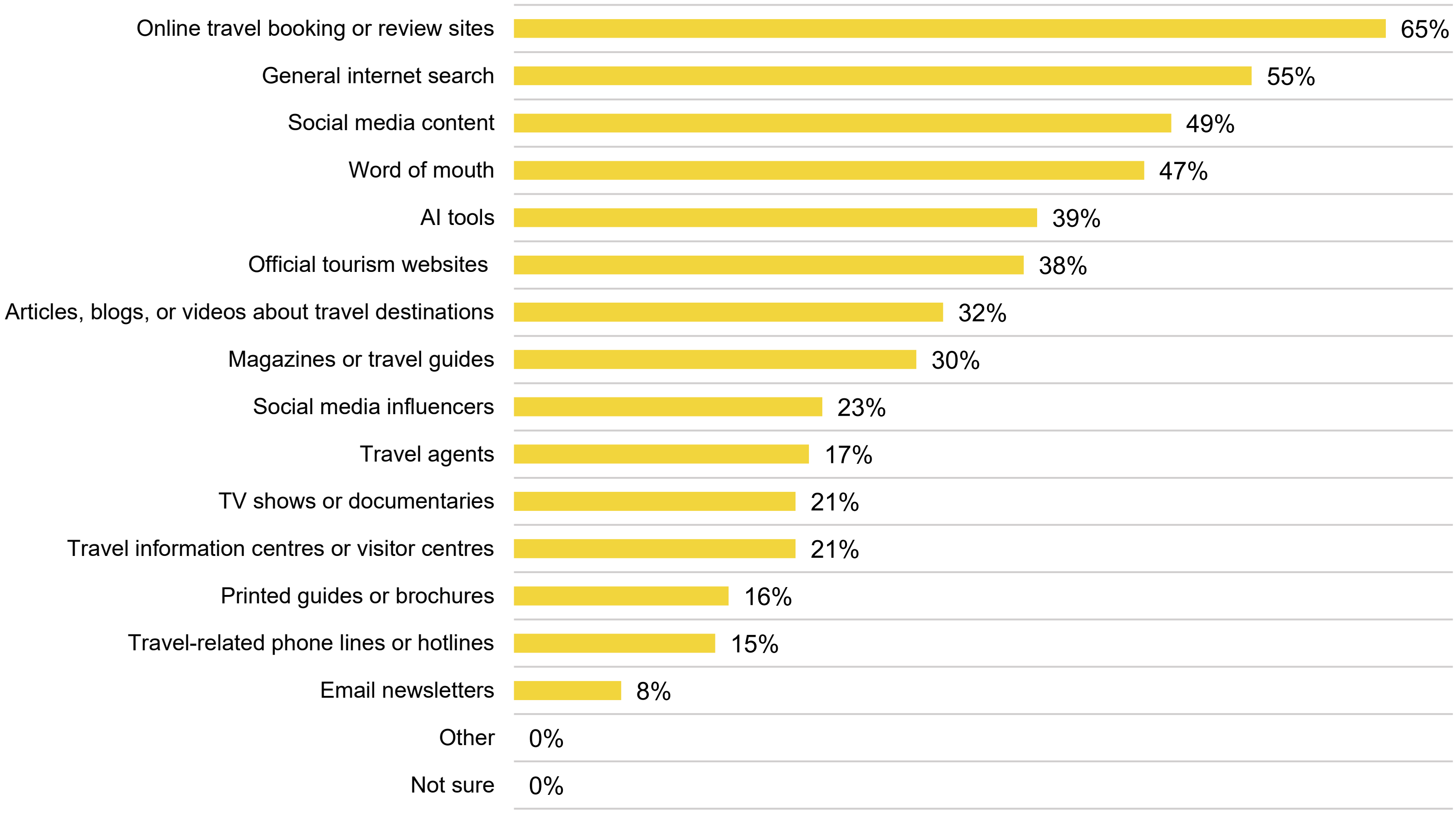
ONTARIO TRAVEL INFORMATION SOURCES – US FLY

Online travel booking or review sites is the most used source to obtain Ontario travel information for US Fly respondents.

Social media content is not too far from the main sources used. This may suggest that US Fly travellers like to see videos and pictures from firsthand experiences to gauge whether they want to travel or not.

Compared to the other markets, US Fly is more likely to use travel-related phone lines or hotlines and travel agents.

Compared to US Drive, Fly is more likely to use word of mouth and articles, blogs, or videos about travel destinations.



I2. Which of the following sources did you use to obtain information about travelling within Ontario, if any? (Multi-select)
Respondents who have looked for information. (n=219)

SOCIAL MEDIA USAGE FOR TRAVEL PLANNING - OVERALL

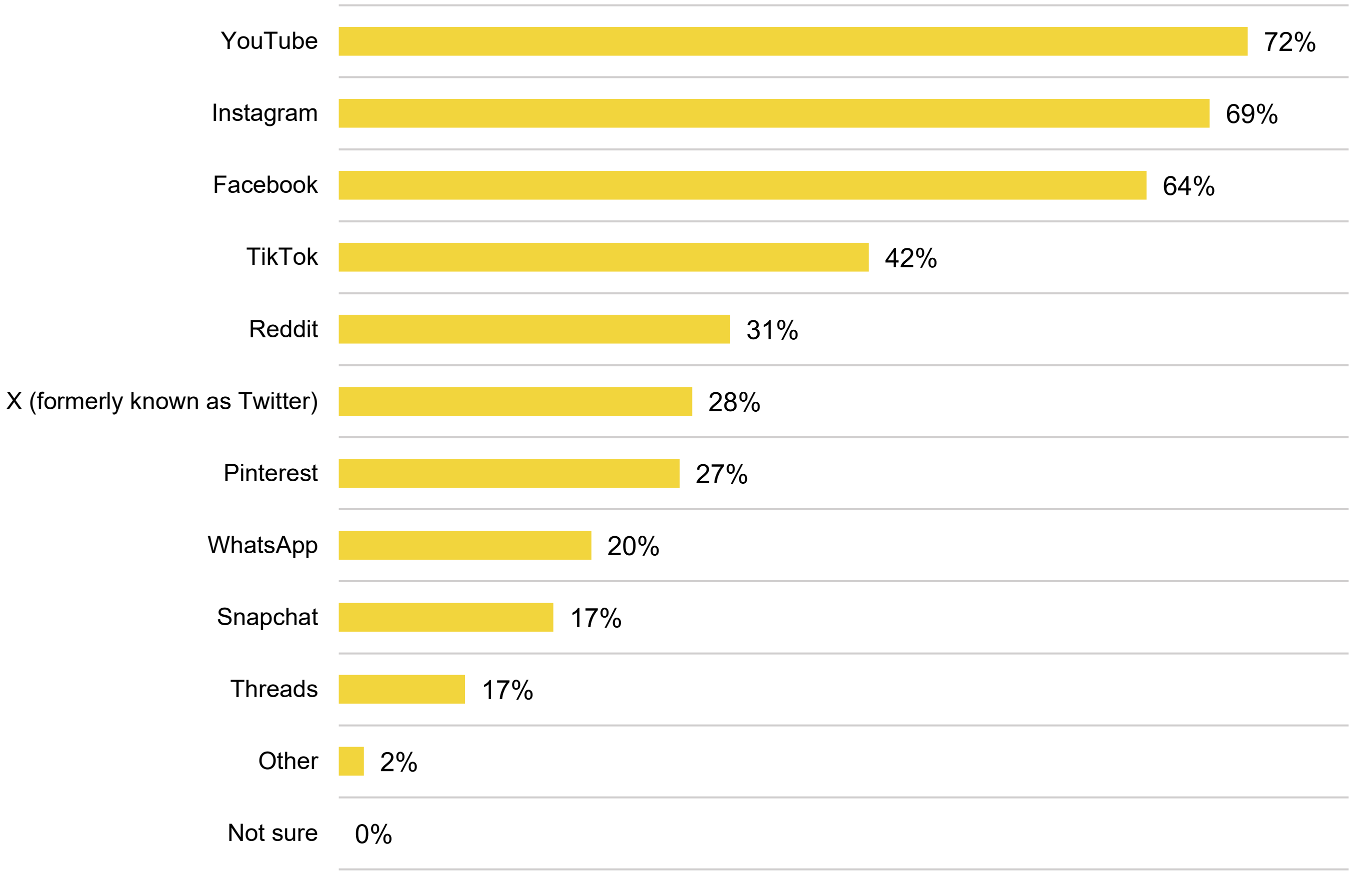
YouTube, Instagram, and Facebook are the top three social media platforms used when looking for travel information.

Men are more likely to use X and YouTube, whereas women use Pinterest and Tik Tok to gather travel information and inspiration.

As well, obtaining travel information on Tik Tok and Reddit is more likely done by 25–34-year-olds.

Respondents with children under the age of 18 tend to use:

- Tik Tok
- X
- WhatsApp
- Snapchat



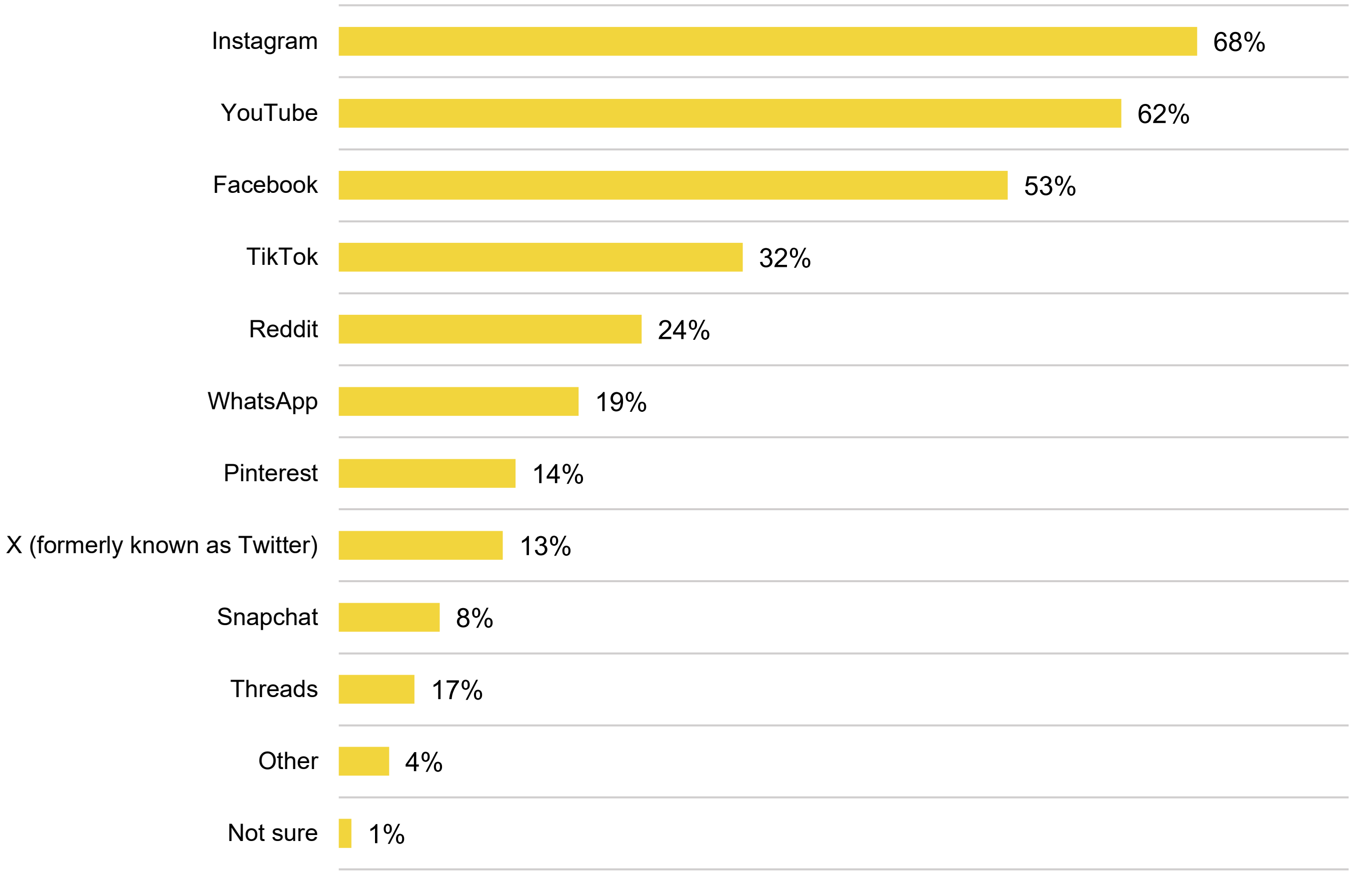
I3. Which social media platforms did you use to obtain information about travelling? (Multi-select)
Respondents who use social media for travel information. (n=337)

SOCIAL MEDIA USAGE FOR TRAVEL PLANNING - ONTARIO

More than half of Ontario respondents reported using Instagram as their top social media platform to obtain travel information, followed by YouTube and Facebook.

The Ontario market is more likely to use Instagram to gather travel information compared to US Drive.

Within the market, Toronto – GTA region has been reported to be more likely to use YouTube compared to the Southwest and Northern region.



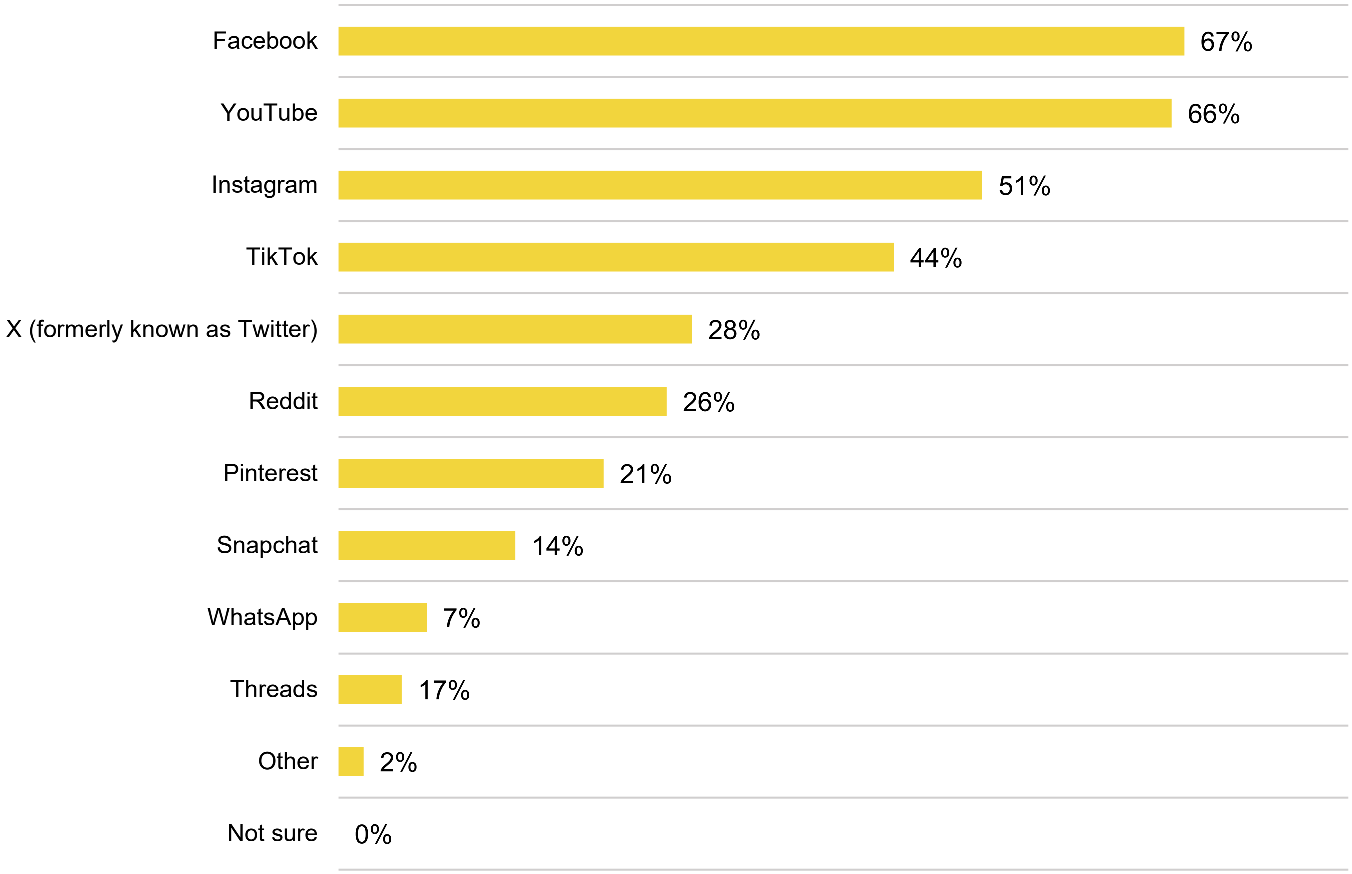
I3. Which social media platforms did you use to obtain information about travelling? (Multi-select)
Respondents who use social media for travel information. (n=122)

SOCIAL MEDIA USAGE FOR TRAVEL PLANNING – US DRIVE

Two-thirds of US Drive stated Facebook and YouTube are the top social media platforms to obtain travel information.

Compared to Ontario, US Drive is more likely to use X (formerly twitter) to gather travel information.

Within the market, Michigan is more likely to obtain information about travelling with Pinterest compared to Ohio.



I3. Which social media platforms did you use to obtain information about travelling? (Multi-select)
Respondents who use social media for travel information. (n=88)

SOCIAL MEDIA PLATFORMS FOR TRAVEL PLANNING – US FLY

YouTube, Instagram, and Facebook are the main social media platforms used to obtain travel information for the US Fly market.

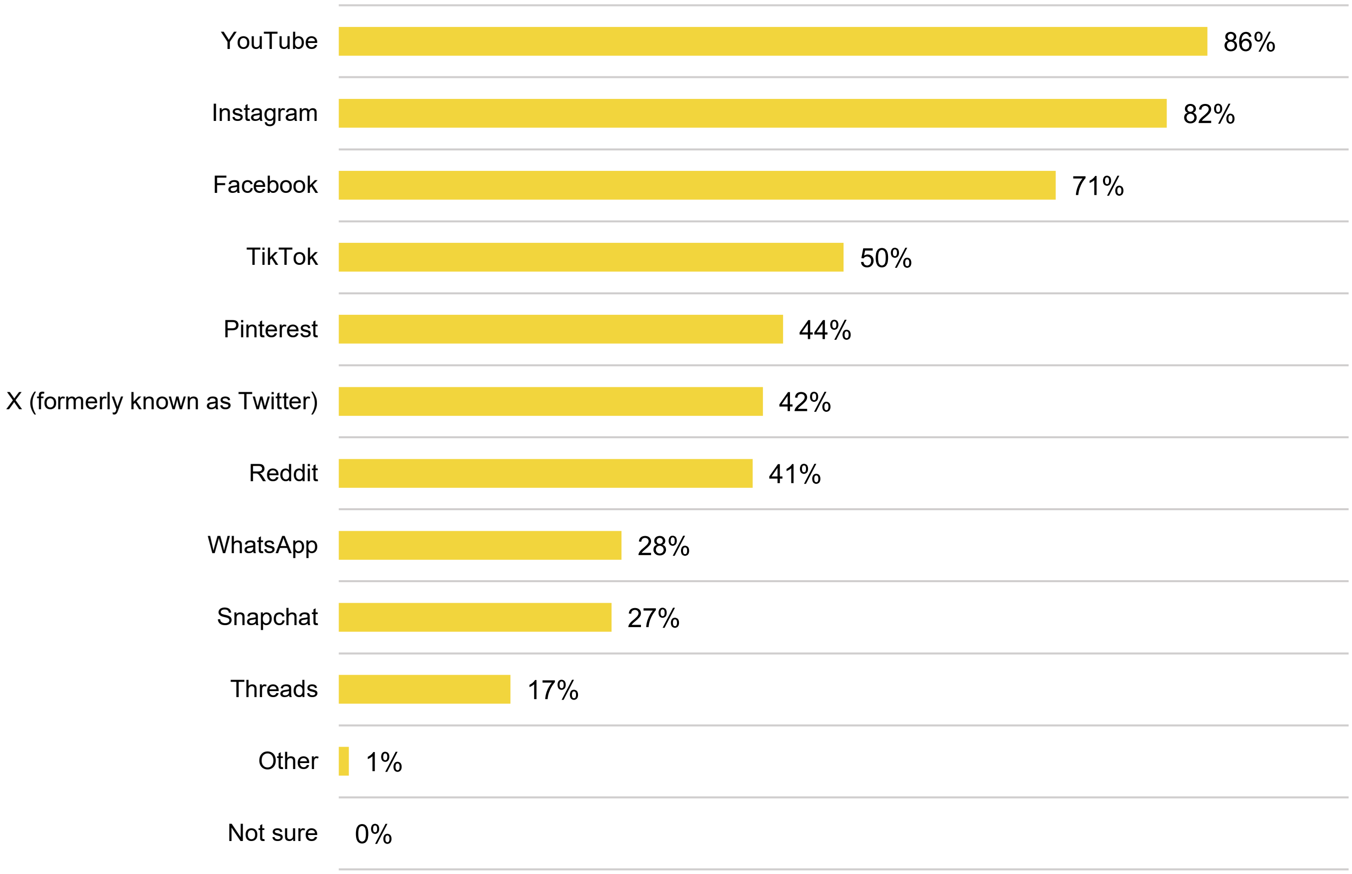
Comparing with the other markets, US Fly tends to use more:

- YouTube
- Instagram
- Pinterest
- Threads

Comparing with the Ontario market, US Fly tends to use more:

- Facebook
- Tik Tok
- Reddit
- X (formerly Twitter)
- Snapchat

Comparing with the US Drive market, US Fly is more likely to use WhatsApp to gather travel information.



I3. Which social media platforms did you use to obtain information about travelling? (Multi-select)
Respondents who use social media for travel information. (n=127)

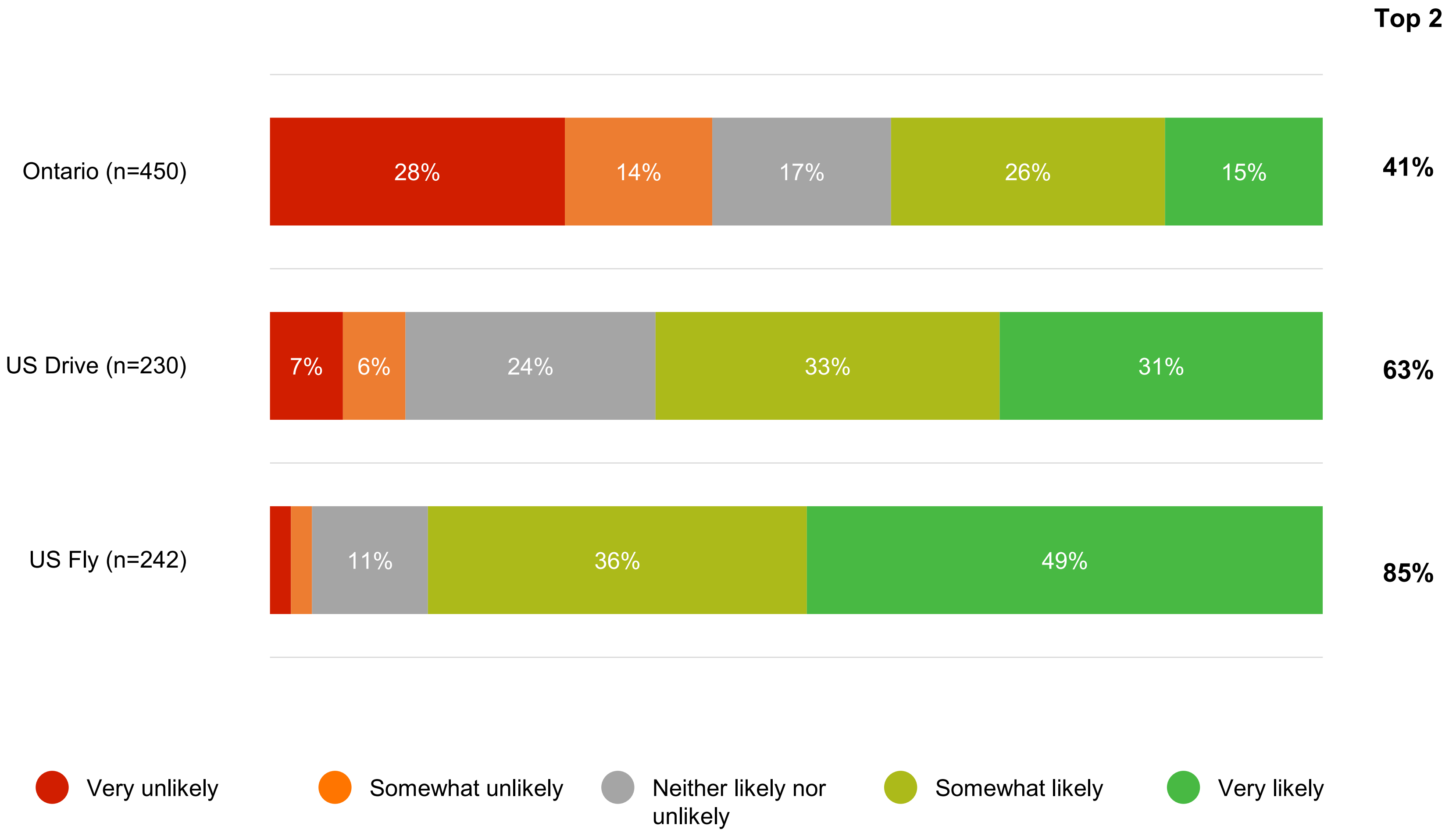
LIKELIHOOD OF USING AI TOOLS

The US Fly market is more likely to use AI tools to help plan their next trip when compared with US Drive and the Ontario Domestic Markets.

Unpacking these findings, the Ontario market is equally likely (41%) as they are unlikely (42%) to use AI tools for future travel planning.

Respondents who are more likely to use AI to help on their next trip planning tend to be:

- BIPOC respondents
- 35-44 years old
- Living with children under the age of 18



I6. How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next trip? (5-point scale)
Respondents who plan to take an overnight trip.

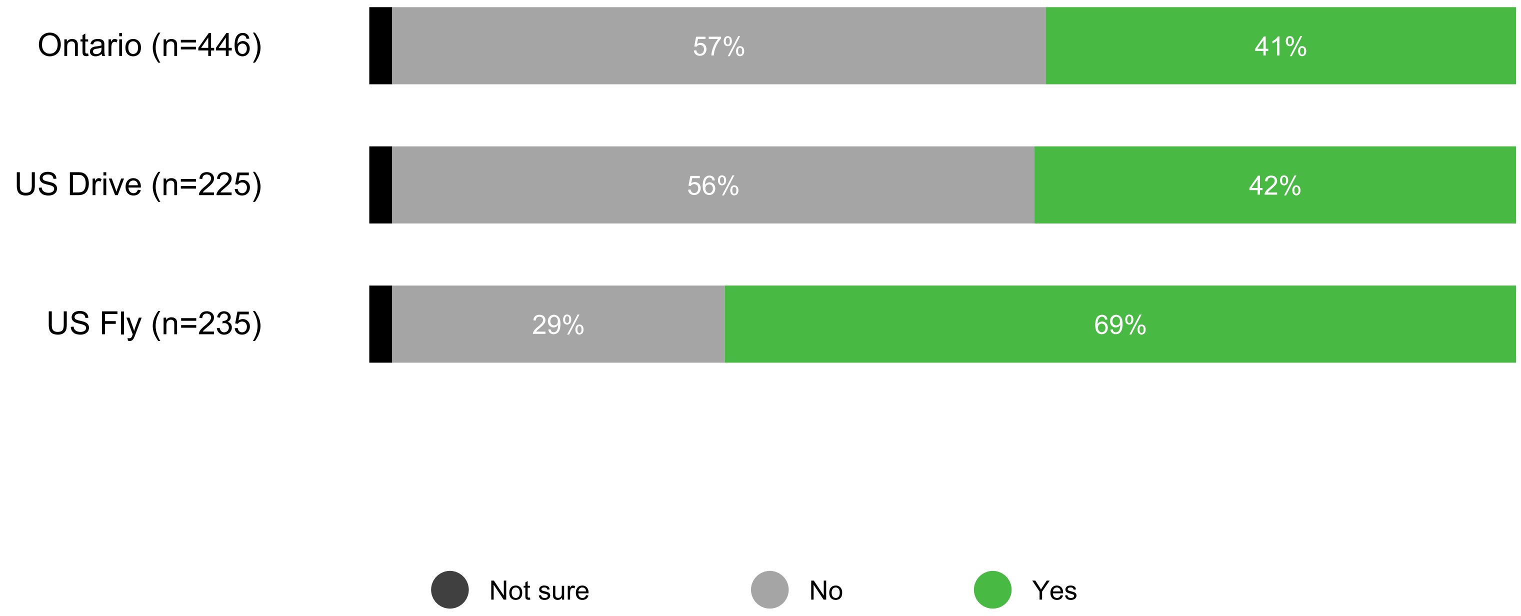
AI USAGE IN THE PAST 12 MONTHS FOR TRAVEL PLANNING

US Fly respondents admitted to using AI tools in the past 12 months to help plan their trip, confirming they are more likely to use it again.

Whereas the Ontario and US Drive markets are on the same page with using AI in the past 12 months for trip planning, with two in five agreeing.

Respondents who were more likely to use AI to help plan their previous trip tend to be:

- BIPOC respondents
- 25-34 years old
- Living with children under the age of 18



I4. In the past 12 months, have you used any AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your trip(s)? (Single-select)
Respondents who have not taken an overnight trip in/to Ontario in the past 12 months or has taken an overnight trip anywhere.

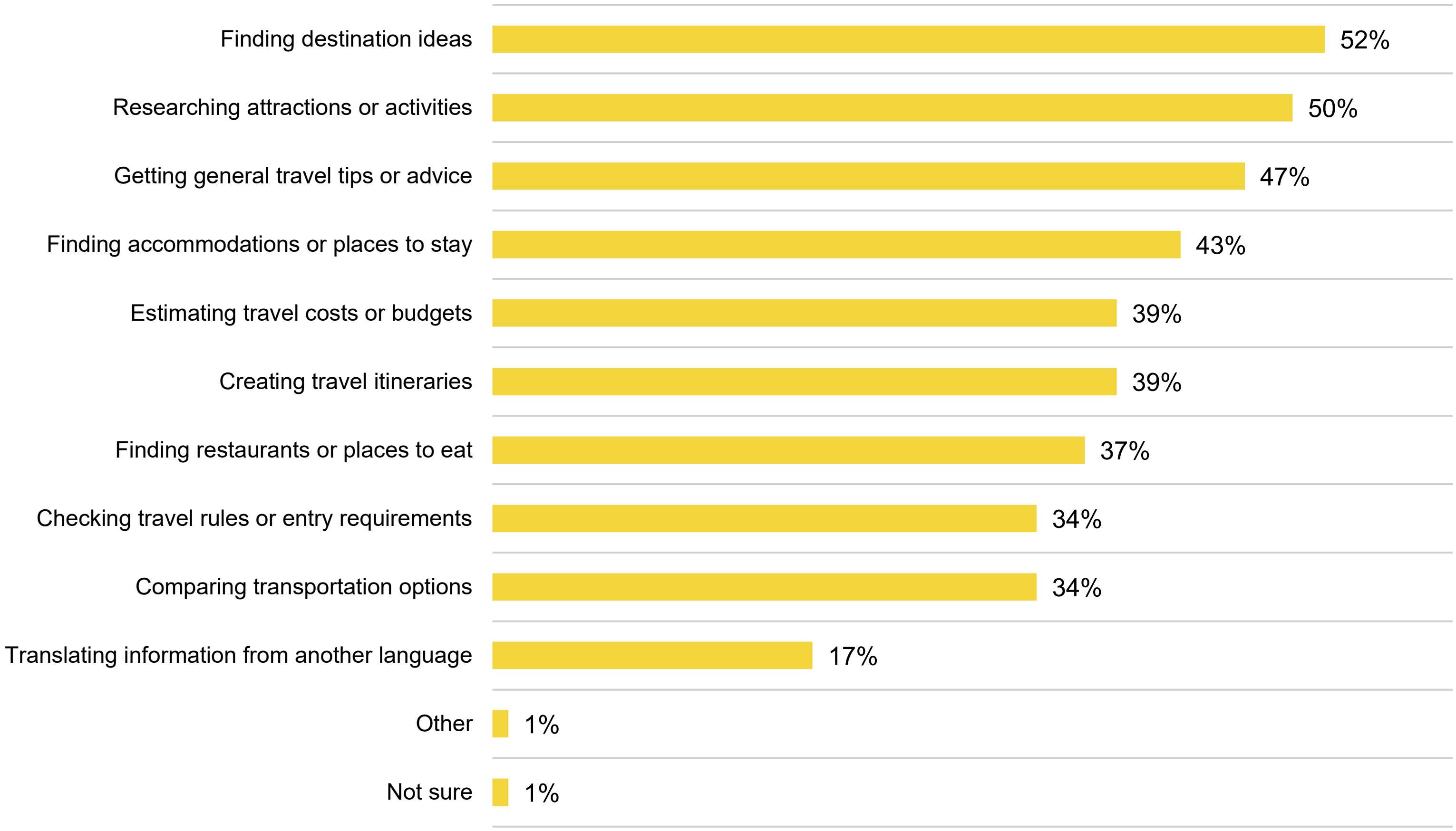
AI ASSISTANCE IN TRAVEL PLANNING - OVERALL

Finding destination ideas, researching attractions or activities, and getting general travel tips or advice are the top ways respondents used AI tools when planning a trip.

How respondents used AI shows a steady range of purposes, but fewer reported using it for translation (17%), suggesting that many are not travelling to destinations where language is a barrier.

Caucasian respondents are more likely to use AI tools when checking travel rules, comparing transportation options, and translating information from another language.

In addition, respondents who are 25-34 years old reported to use AI tools when creating itineraries for their future travels compared to 35-44 year-olds.



I5. How did you use AI tools when planning your trip(s)? (Multi-select)
Respondents who used AI tools to help plan a trip in the past 12 months.(n=363)

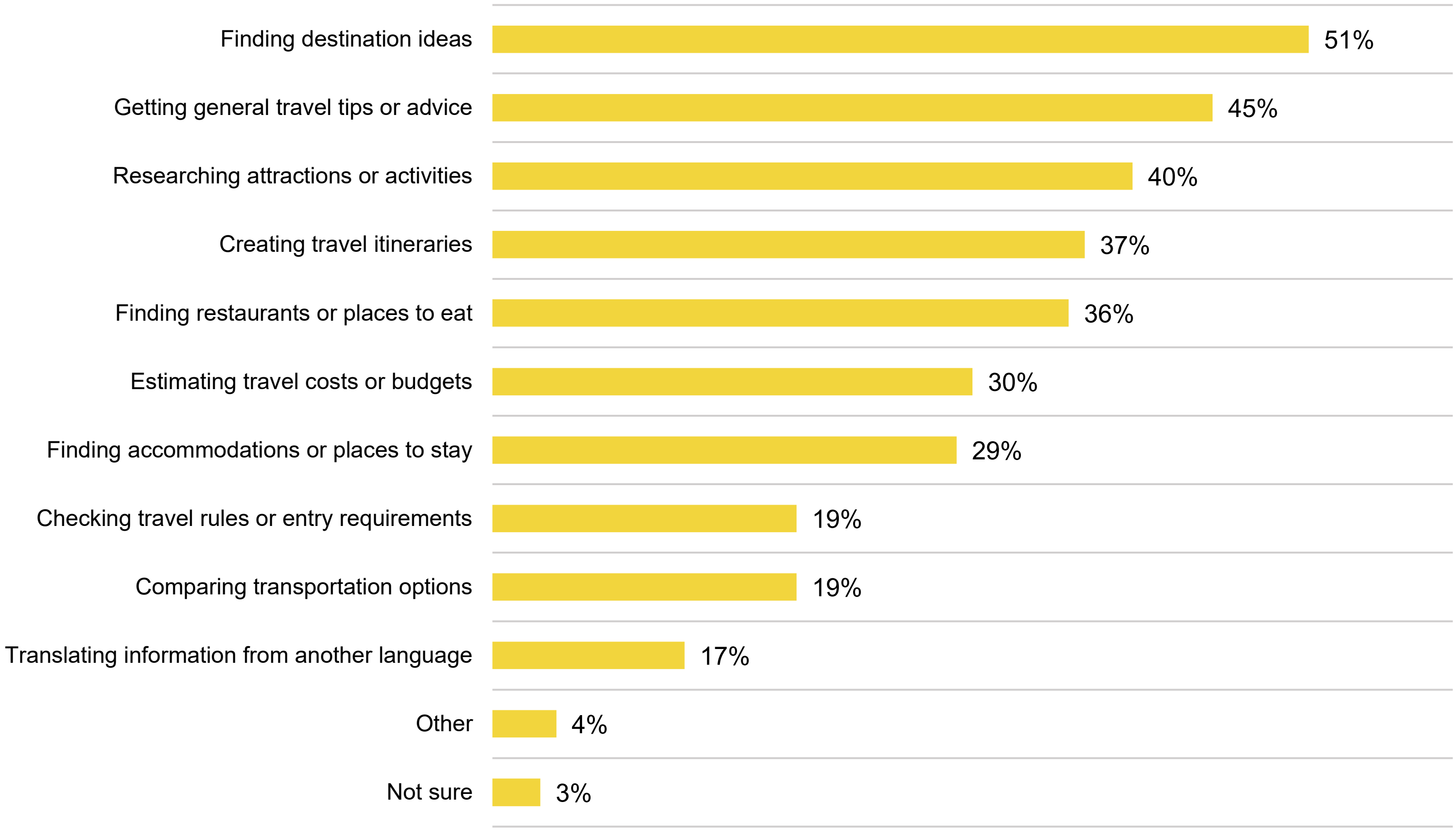
AI ASSISTANCE IN TRAVEL PLANNING - ONTARIO

Ontario travellers are using AI most often for trip inspiration and general guidance.

The top use is finding destination ideas (51%), followed by general tips (45%) and researching attractions (40%), pointing to strong engagement in early planning.

Usage drops notably for rule-checking (19%), transportation comparisons (19%), and translation (17%), suggesting lower use for technical or logistical tasks.

Therefore, it appears that AI serves primarily as a creative planning tool rather than a detailed trip assistant.



I5. How did you use AI tools when planning your trip(s)? (Multi-select)
Respondents who used AI tools to help plan a trip in the past 12 months. (n=108)

AI ASSISTANCE IN TRAVEL PLANNING – US DRIVE

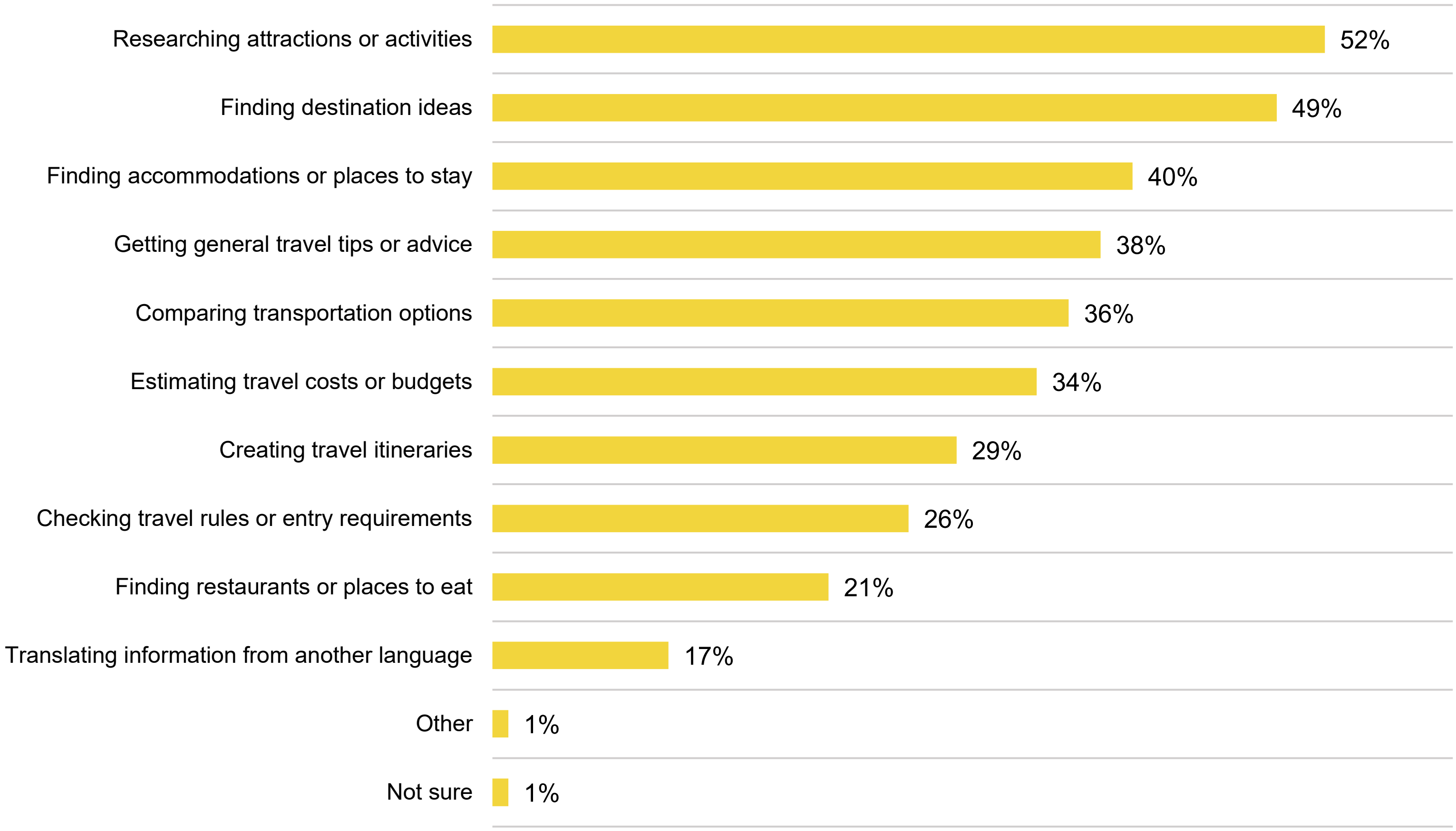
US Drive travellers use AI tools primarily for inspiration and logistics.

Top uses include researching attractions (52%) and finding destination ideas (49%), showing AI's strength in trip discovery.

Use tapers off for more detailed tasks like itinerary creation (29%) and checking travel rules (26%), suggesting a more selective application.

AI appears to serve as a helpful supplement rather than a comprehensive planning tool for the US Drive segment.

The US Drive market is more likely to use AI to compare transportation options compared to the Ontario market.



I5. How did you use AI tools when planning your trip(s)? (Multi-select)
Respondents who used AI tools to help plan a trip in the past 12 months. (n=93)

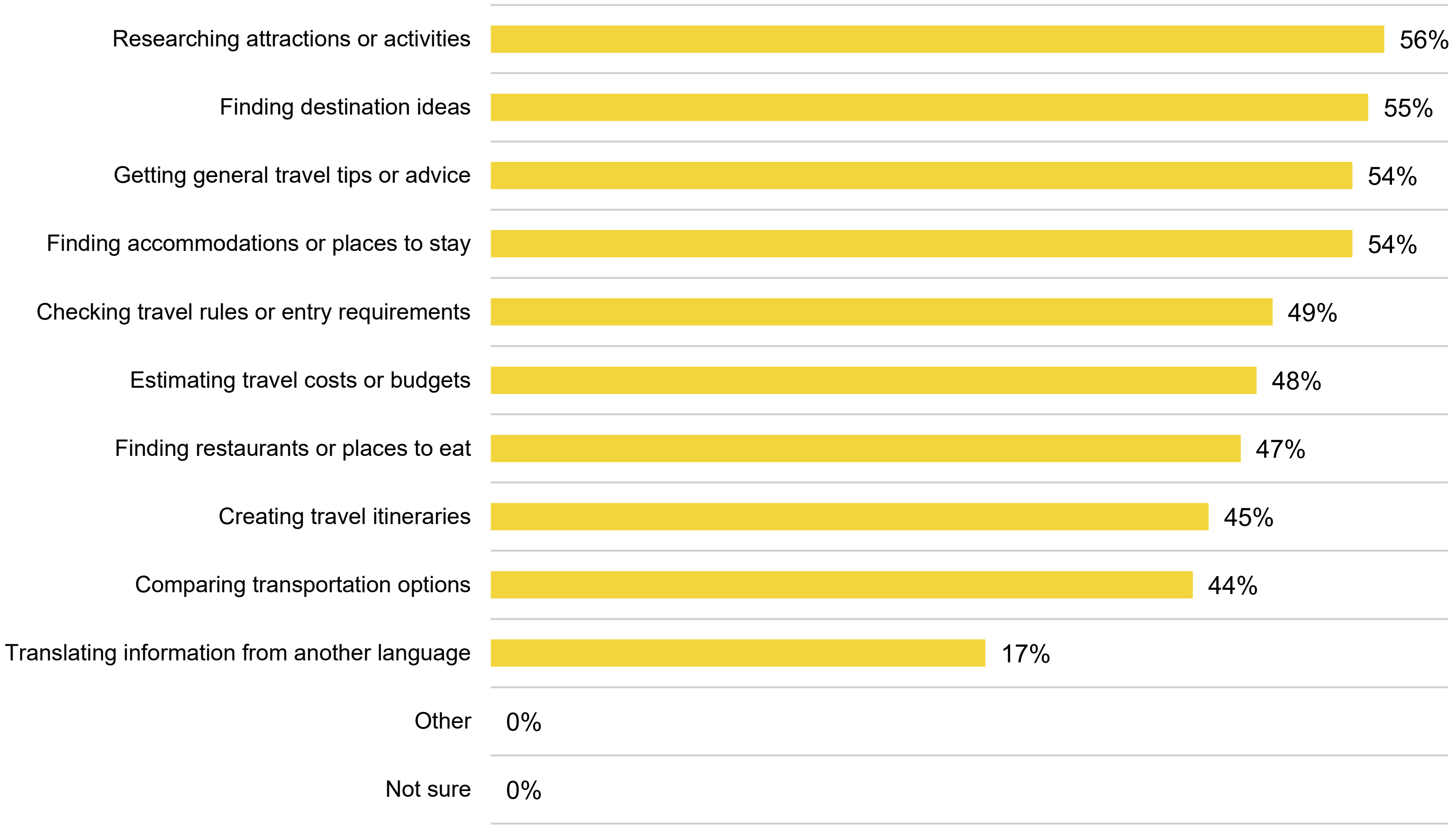
AI ASSISTANCE IN TRAVEL PLANNING – US FLY

AI tools are widely used by US Fly travellers for planning trips, with strong engagement across a variety of tasks.

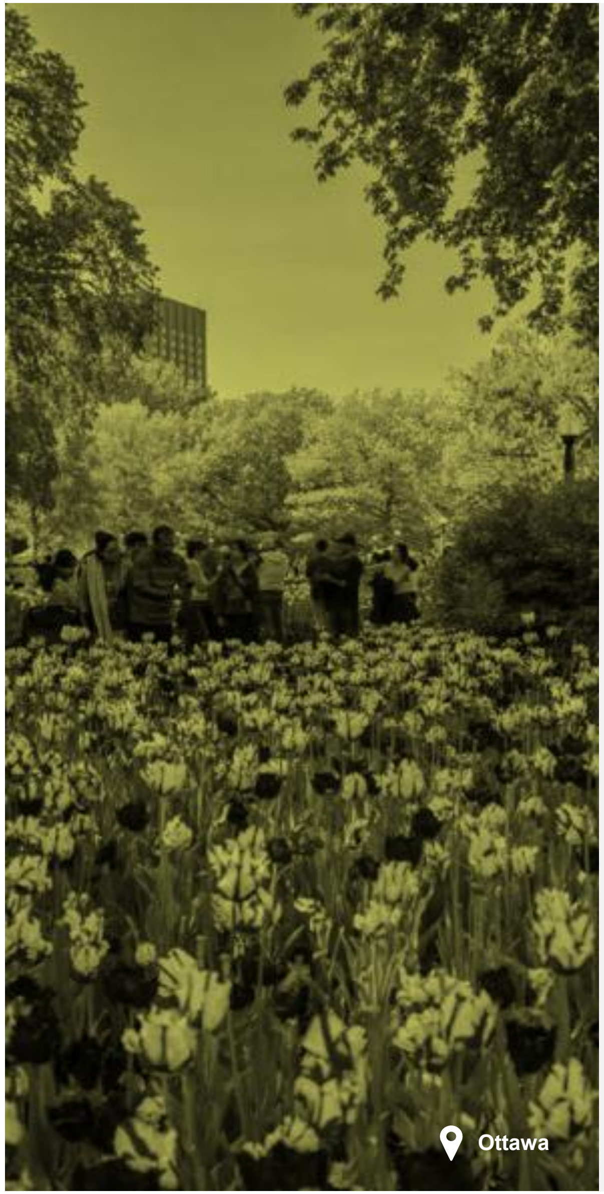
Most planning behaviours, like researching attractions, finding destinations, and getting advice, cluster around 54–56%, showing consistent reliance on AI for early-stage decisions.

Translation (17%) saw far lower usage, suggesting AI is used more for logistical help than language support.

AI's role in travel planning appears well established, especially for inspiration and trip logistics.



I5. How did you use AI tools when planning your trip(s)? (Multi-select)
Respondents who used AI tools to help plan a trip in the past 12 months. (n=162)



PERCEPTION OF ECONOMIC AND POLITICAL CONDITIONS

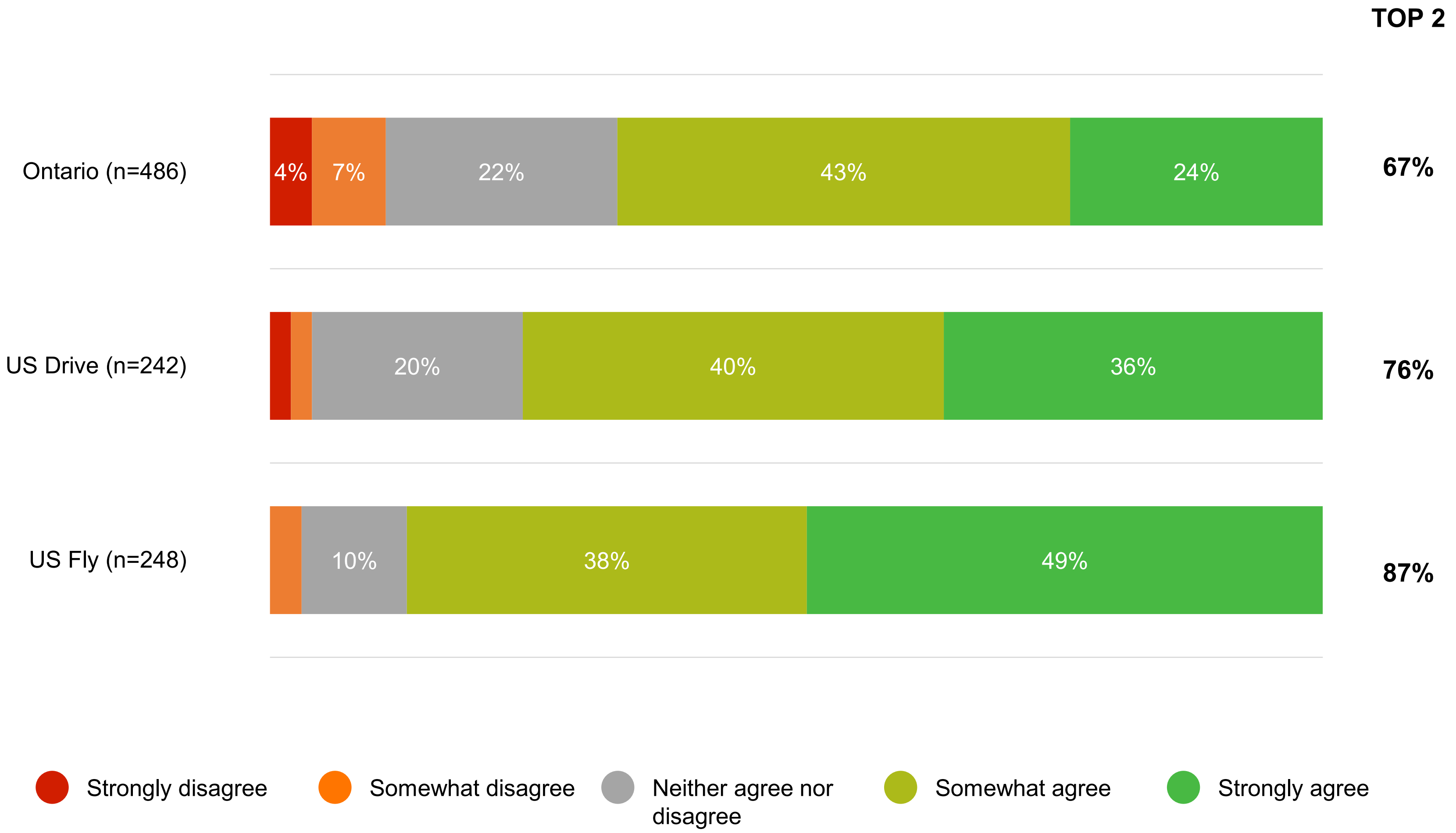
TRAVEL AS A WORTHWHILE INVESTMENT DURING THIS CURRENT ECONOMIC CLIMATE

Most travellers still see travel as a worthwhile investment, even in today's economic climate.

Agreement is high across all groups, suggesting that travel retains strong perceived value despite financial pressures.

US Fly travellers express the strongest conviction (87%), followed by US Drive (76%) and Ontario (67%), pointing to differing levels of economic optimism.

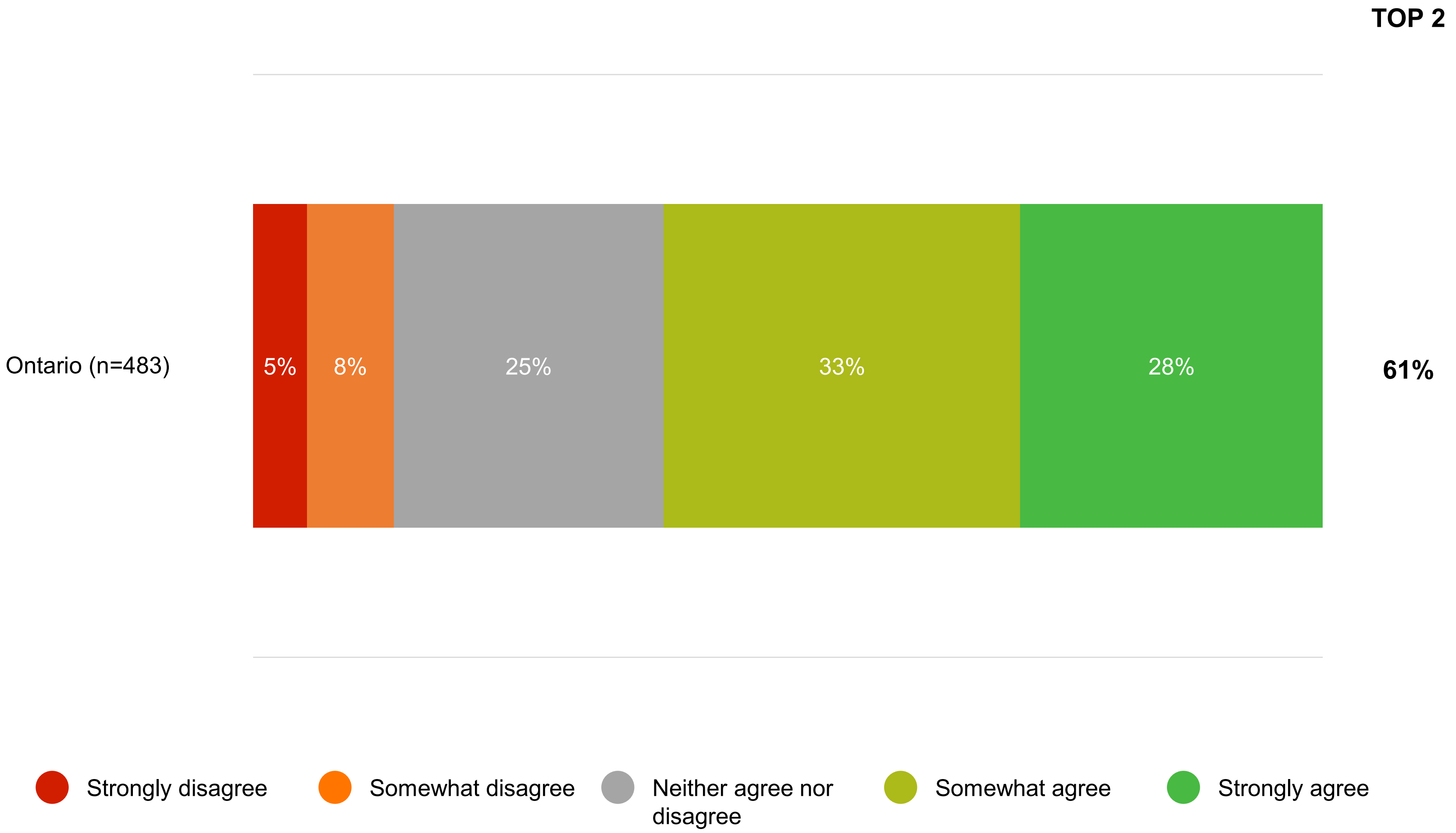
Travel may remain resilient, particularly among those who view it as essential to well-being or personal fulfillment.



T4. How much do you agree or disagree with the following statements? [I feel travel is a worthwhile investment, even in the current economic climate.] (Excludes "don't know") (5-point scale)
All respondents.

IMPACT OF INTERNATIONAL EXCHANGE RATES ON DOMESTIC TRAVEL

Three in five Ontario respondents are more likely to travel within Ontario in the next 12 months due to the unfavourable international exchange rates.



T4. How much do you agree or disagree with the following statements? [I am more likely to travel within Ontario in the next 12 months because of the unfavourable international exchange rates.] (5-point scale)
All respondents from Ontario.

INFLUENCE OF EXCHANGE RATE ON TRAVEL TO ONTARIO, CANADA

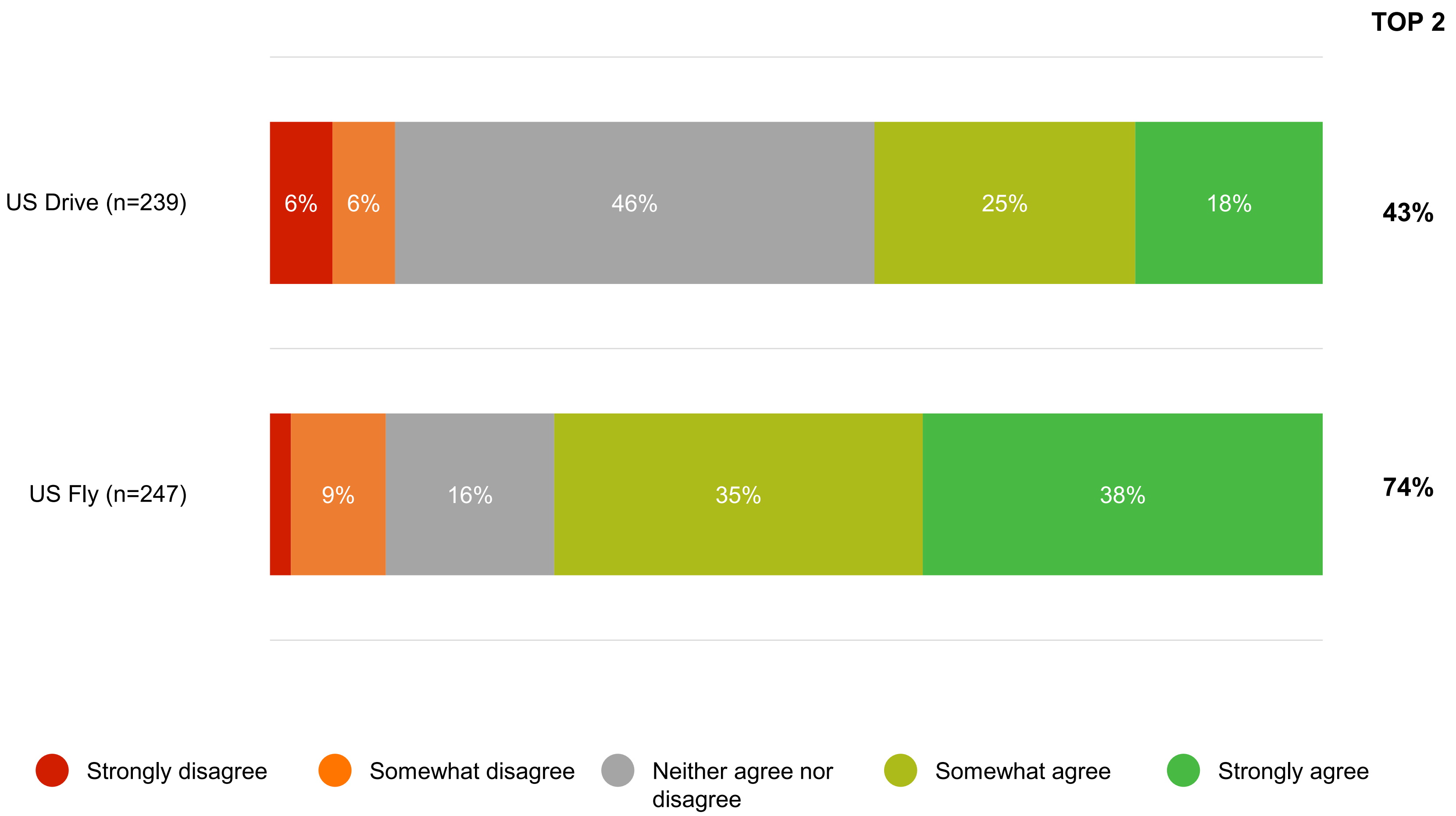
The exchange rate is a significant motivator for cross-border travel to Ontario, particularly for US Fly travellers.

Both groups show some agreement that the favourable rate influences their plans, though to different degrees.

74% of US Fly respondents say the exchange rate makes them more likely to visit, compared to just 43% of US Drive.

Therefore, currency strength may play a greater role for those planning higher-spend or longer-distance trips to Ontario.

Expanding on this, those who share these views tend to be:
- 25-34 years old
- From NYC
- Living with children under 18 years old



T4. How much do you agree or disagree with the following statements? [I am more likely to travel to Ontario, Canada in the next 12 months because of the favourable exchange rate.] (5-point scale)
All respondents from US Drive and US Fly.

FINANCIAL PRESSURES IMPACTING FUTURE TRAVEL PLANS

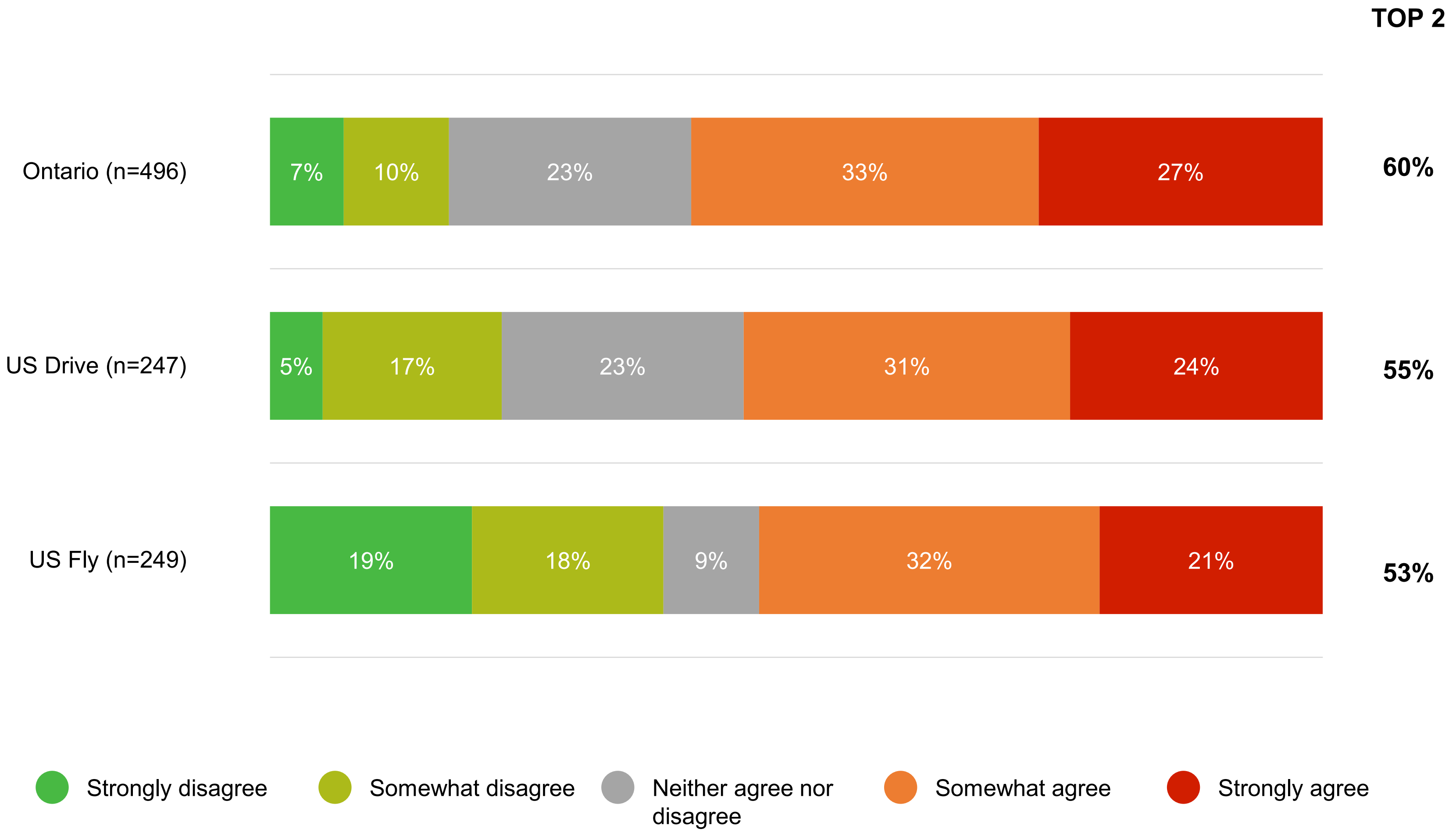
Financial pressures are a leading concern shaping future travel plans across all markets.

A majority in each group report that financial factors are affecting their travel decisions, with limited neutrality overall.

Ontario travellers feel the greatest financial strain (60%), while US Fly respondents show the lowest impact (53%), potentially reflecting income or currency considerations.

US Fly respondents are the most likely to disagree (37%), suggesting a greater sense of financial flexibility or travel commitment.

Affordability remains central to how travellers plan and prioritize future trips.



T5. How much do you agree or disagree with the following statement? “Financial pressures have impacted my travel plans in the next 12 months” (5-point scale)
All respondents.

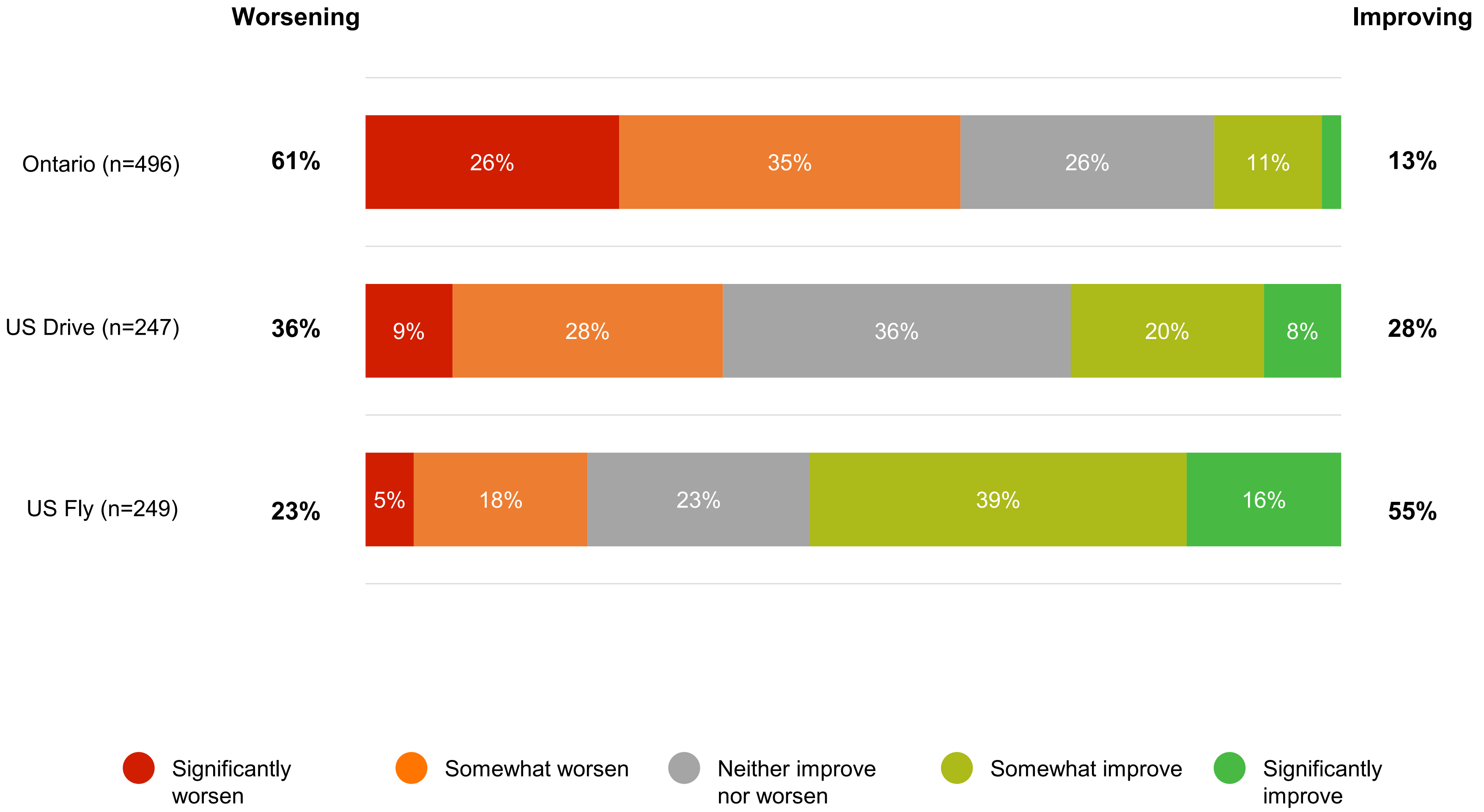
RELATIONSHIP EXPECTATION BETWEEN THE US AND CANADA

Views on the future of US–Canada relations are sharply divided across markets.

Neutrality is fairly common, but respondents tend to lean either optimistic or pessimistic based on origin.

Ontario travellers are the most pessimistic, with 61% expecting relations to worsen. In contrast, 55% of US Fly respondents expect improvement, reflecting starkly divergent outlooks.

These perception gaps may shape future cross-border sentiment, affect trust in foreign media and institutions, and influence how comfortable or motivated travellers feel when choosing destinations across the border.



P2. Over the next 12 months, how do you think the relationship between the US and Canada will change? (Excludes “don’t know”) (5-point scale)
All respondents.

TRAVELLER SENTIMENT ON POLITICAL INSTABILITY AND GLOBAL CONFLICT

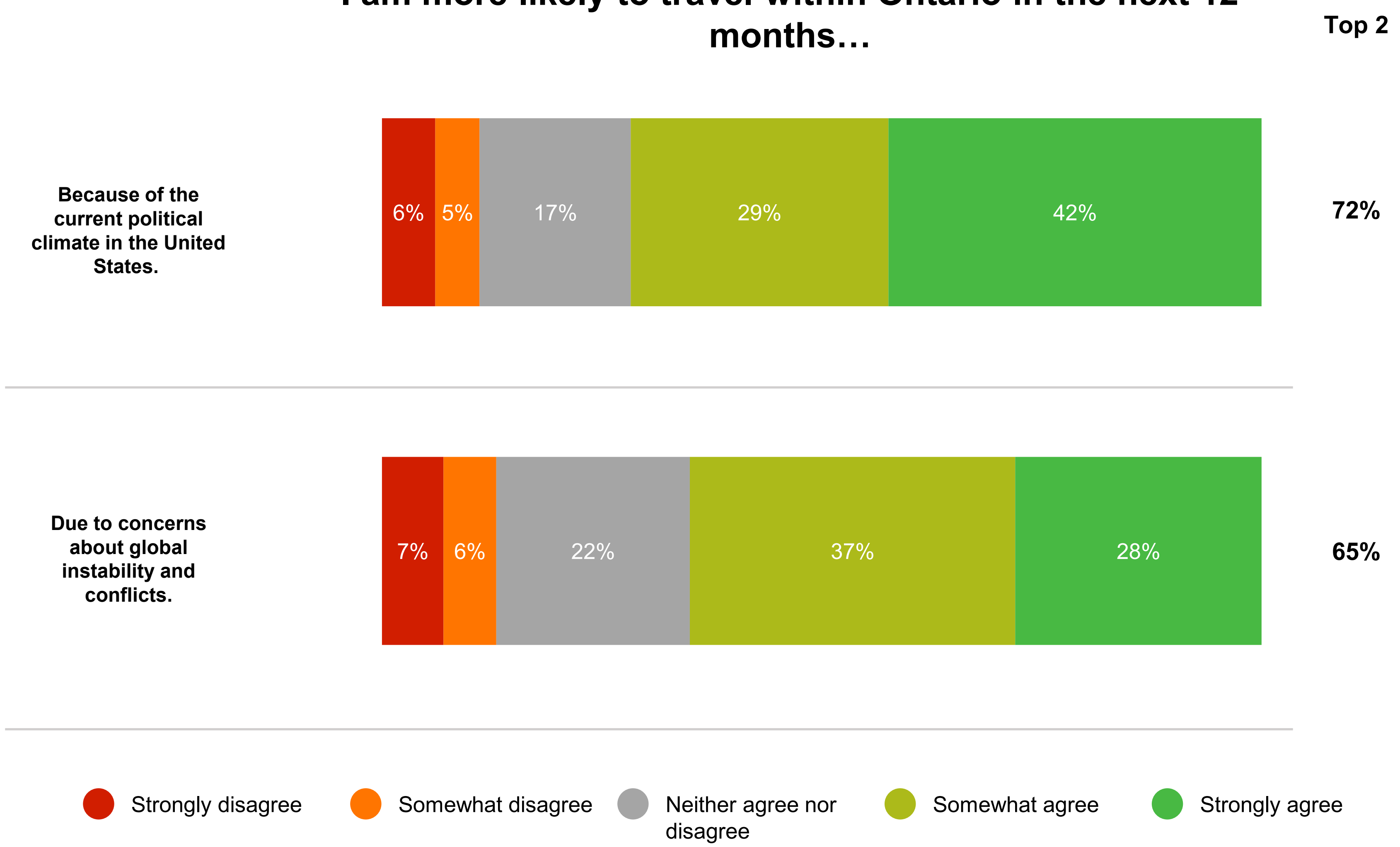
Political and global instability are influencing travel behaviour, with a strong lean toward staying within Ontario.

Both domestic political concerns and global conflicts are driving increased preference for local travel.

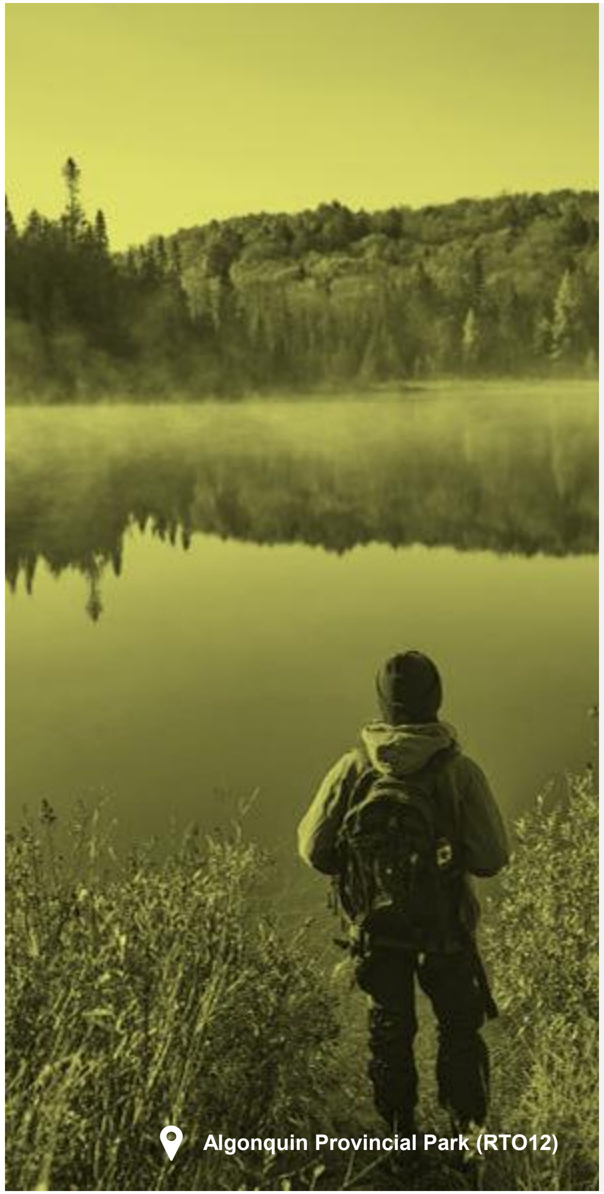
Political tensions in the U.S. (72%) are a slightly stronger motivator than global instability (65%), suggesting proximity and familiarity play a role.

External uncertainty may continue to make Ontario feel like a safer, more stable choice for near-term travel, and may present an opportunity to take advantage of.

I am more likely to travel within Ontario in the next 12 months…



P3. How much do you agree or disagree with the following statements? (Excludes “don’t know”) (5-point scale)
All respondents from Ontario. n=481



ENVIRONMENTAL CONSIDERATIONS IN TRAVEL

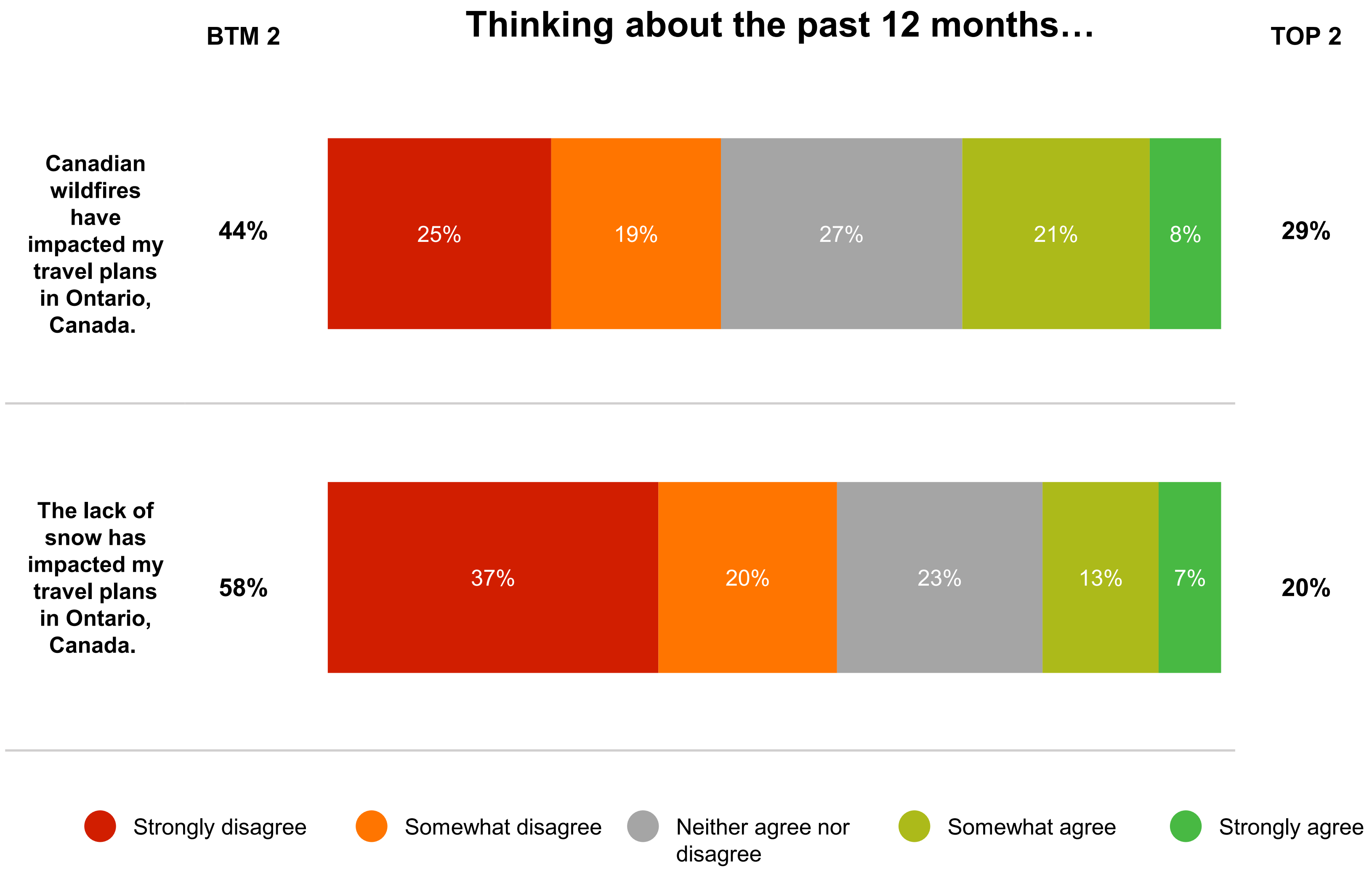
PAST WEATHER CONDITIONS IMPACTING ONTARIO TRAVELS

Environmental shifts continue to shape Ontario travel patterns, with many travellers reporting impacts due to extreme conditions over the past year.

Both wildfire activity and reduced snowfall disrupted plans for a notable share of travellers, underscoring the increasing sensitivity of travel behaviours to seasonal and environmental variation.

Lack of snow (58%) had a greater reported impact than wildfires (44%), suggesting that winter-dependent travel (e.g., skiing, snowmobiling) may be more immediately affected by climate variability.

As climate unpredictability increases, Ontario's travel sector may need to adapt its seasonal offerings and emphasize flexibility in planning to meet evolving visitor needs.



ST1. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
All respondents. n=972

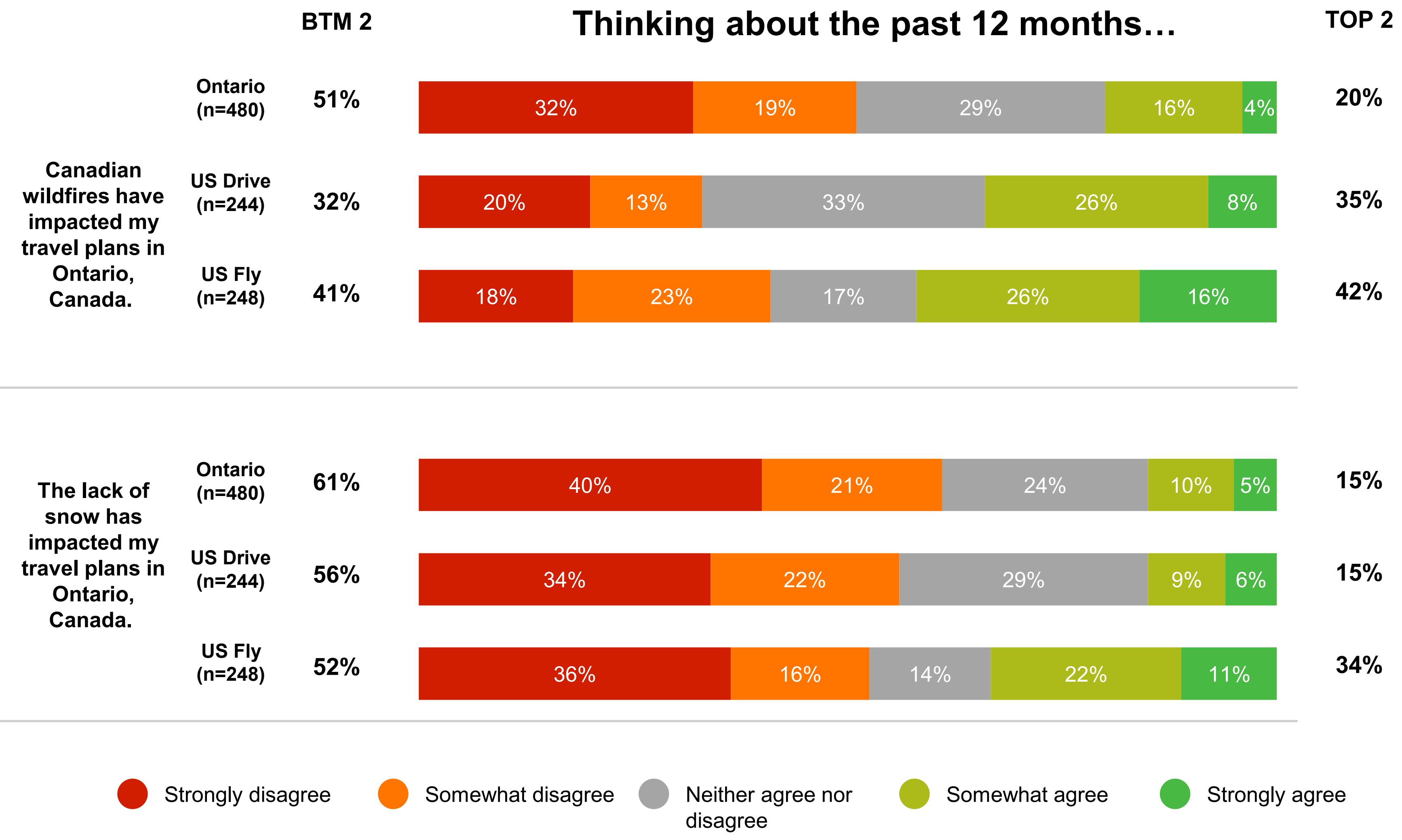
PAST WEATHER CONDITIONS IMPACTING ONTARIO TRAVELS

Weather-related disruptions have clearly affected travel for each segment, with Ontario residents most impacted across both wildfire and snow-related conditions.

Across all markets, the lack of snow was more impactful than wildfire smoke, suggesting winter conditions remain a key driver of travel to Ontario.

Meanwhile, wildfires disrupted travel for half of Ontario respondents (51%), compared to 32% of US Drive and 41% of US Fly travellers. This points to greater regional sensitivity to environmental conditions.

Ongoing weather variability may continue to reshape expectations for Ontario's peak seasons and trip planning windows.



ST1. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
All respondents. n=972

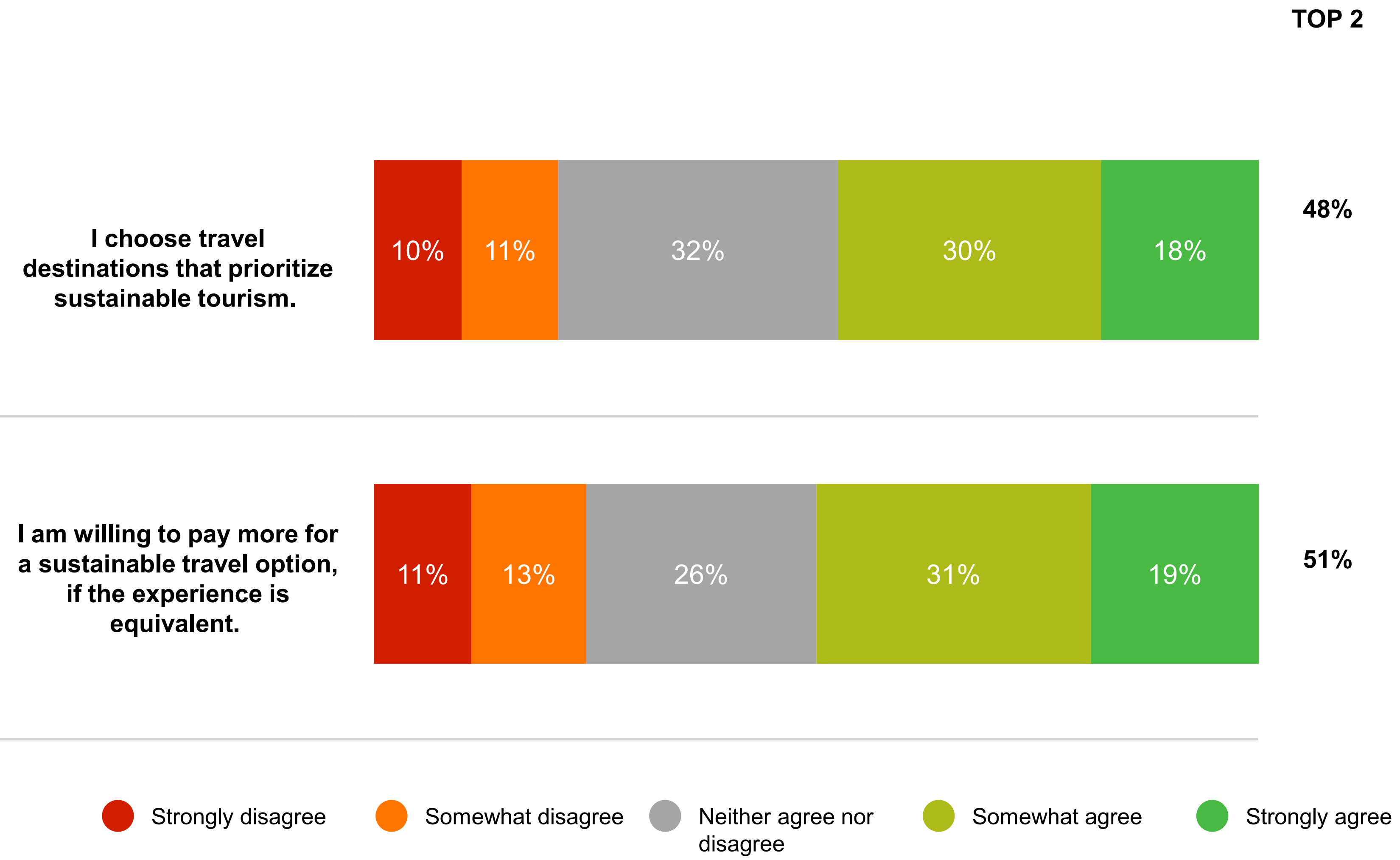
PERCEPTION ON SUSTAINABLE TRAVEL

Nearly half of Ontario travellers report sustainable tourism influences their decisions.

Respondents are slightly more willing to pay for sustainable options (51%) than to seek out sustainable destinations (48%), though both show similar support levels.

A third remain neutral on both questions, indicating possible uncertainty or lack of awareness.

As sustainability gains visibility, clearer value propositions may help shift passive attitudes into active choices.



ST2. How much do you agree or disagree with the following statements? (Excludes “don’t know”) (5-point scale)
All respondents. n=955

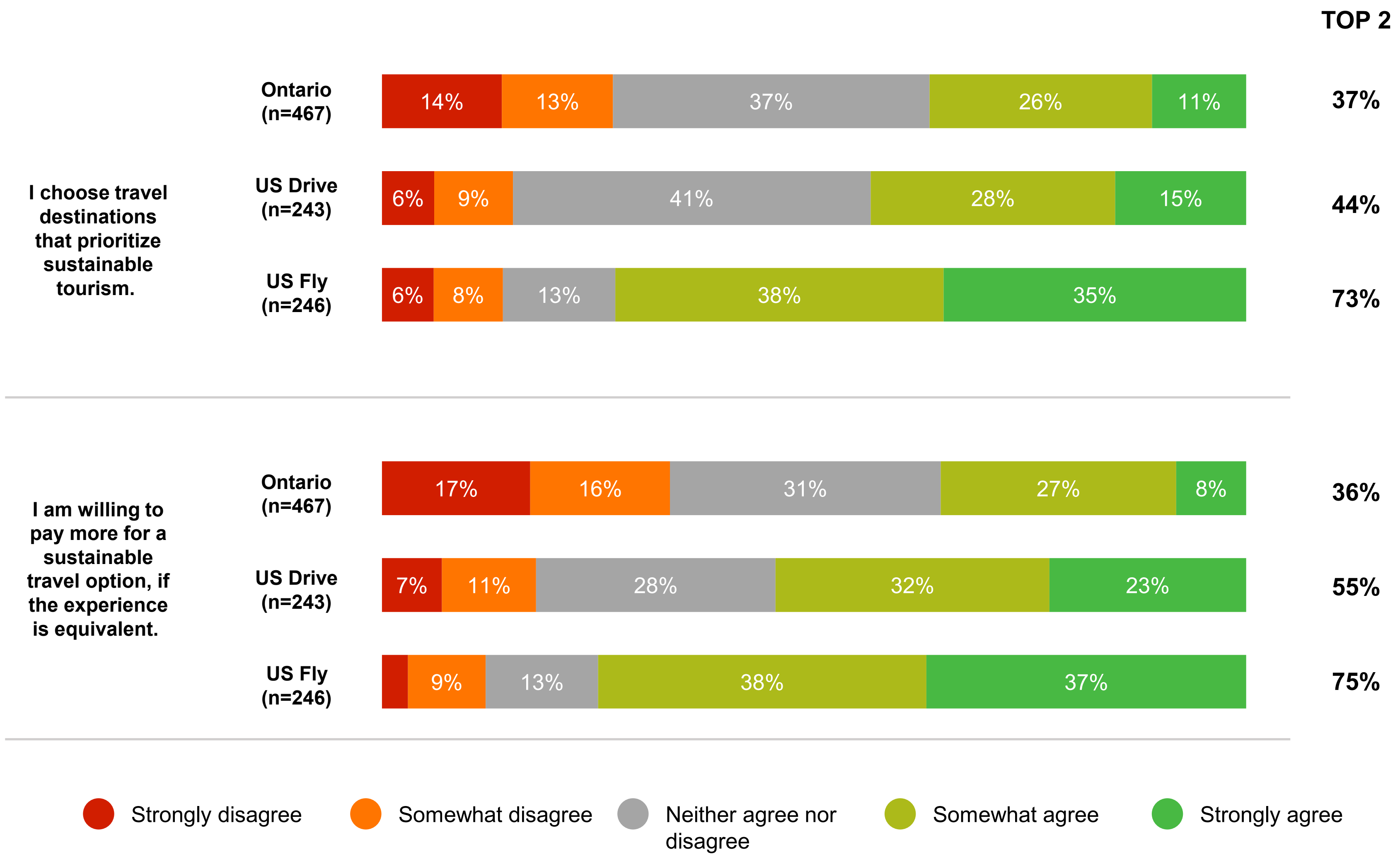
PERCEPTION ON SUSTAINABLE TRAVEL

US travellers, especially those who fly, are significantly more motivated by sustainability than Ontario residents.

US Fly travellers show high agreement on choosing and paying more for sustainable options (73-75%), while Ontario travellers remain more hesitant (36-37%).

However, neutrality is common across audiences, suggesting room to shift perceptions.

As sustainability becomes more mainstream, gaps in regional attitudes may narrow — but progress will depend on how values translate into perceived travel benefits.



ST2. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
All respondents.