CONTEXT IS EVERYTHING

2SLGBTQI+ RESEARCH – DOMESTIC, U.S., AND INTERNATIONAL MARKETS – PARTNER REPORT

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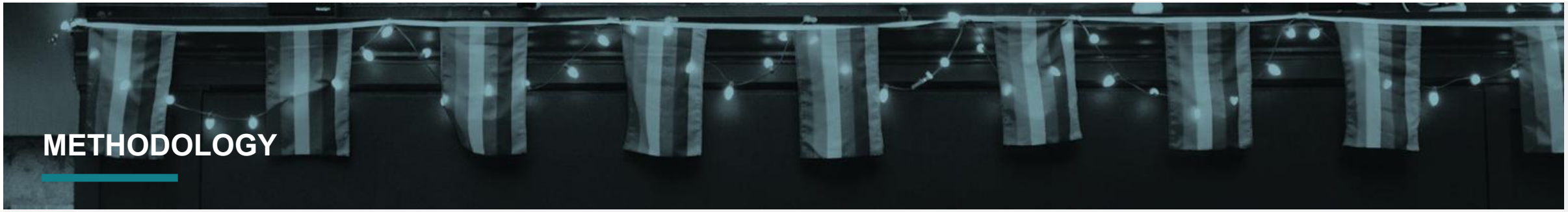


METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview)

Overall Qualifying Criteria:
- 25 to 64 years old
- Identify with a non-heterosexual orientation, a gender identity outside of man or woman, or identified as transgender or trans
- Reside in one of the defined priority markets:
  - Canada (Ontario, Quebec, Atlantic, Western)
  - U.S. Drive (Michigan, Ohio, Upstate NY, Minnesota)
  - U.S. Fly (NYC, Chicago, Boston, DC)
  - UK
  - Germany
  - Mexico
- Have travelled for leisure in the past 2 years and/or are actively planning a leisure trip in the next 2 years
- Hold a valid passport (non-Canadian markets)

Fieldwork Date:
- March 27th – April 18th, 2026

Median Length of Interview:
- 15.8 minutes

Partner Report Considerations:
The results in this partner report are filtered to those who are likely to visit Ontario and aware of Muskoka, Parry Sound and Algonquin Park.

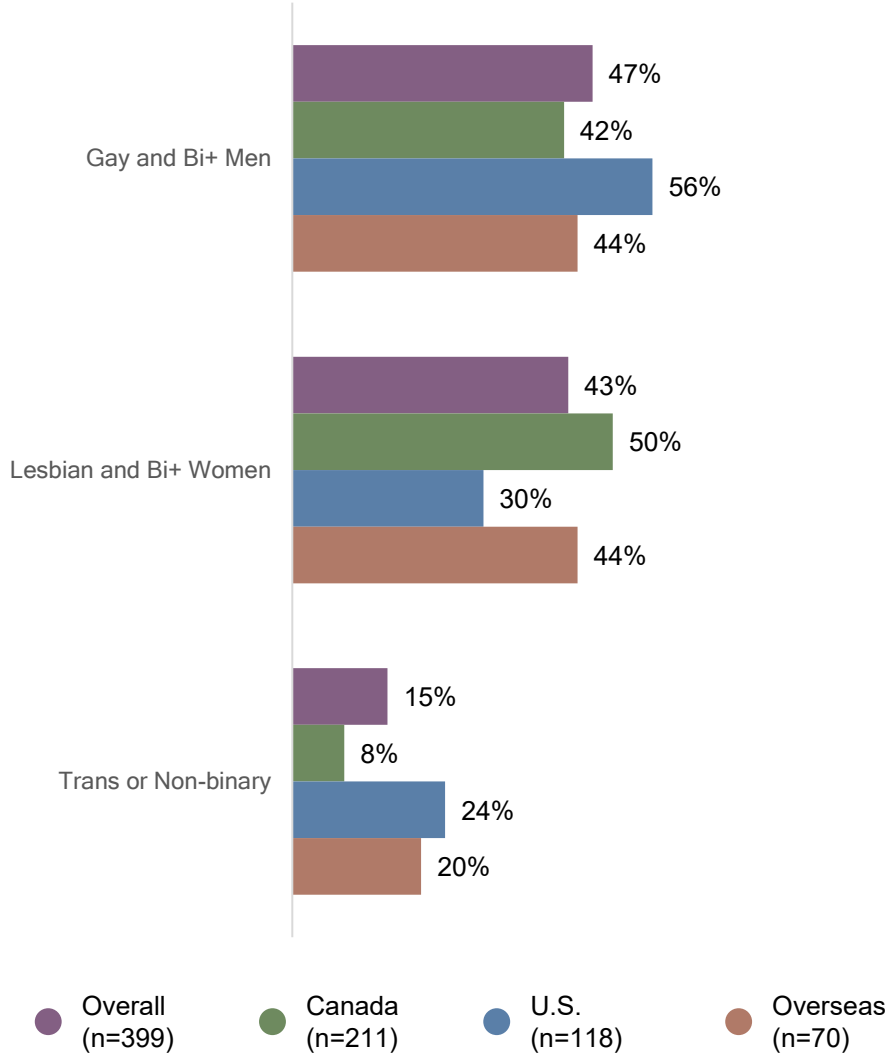
TRAVELLER IDENTITY

The identity composition of those aware of Muskoka, Parry Sound and Algonquin Park varies meaningfully across geographies, with U.S. respondents showing the most distinctive profile of any market.

Gay and bi+ men account for just under half overall, with U.S. respondents considerably higher than either Canada or overseas, where both markets sit at similar levels.

Lesbian and bi+ women show the inverse pattern, with Canada the only market where they account for the majority, while U.S. respondents sit well below both Canada and overseas.

Trans or non-binary respondents follow a similar pattern to gay and bi+ men. They are lowest among Canadian respondents and rising considerably among U.S. and overseas travellers.



SC4A Which of the following best describes your sexual orientation? (Multi-select)
SC4B Which of the following best describes your current gender identity? (Single-select)
SC4C Do you consider yourself to be transgender or trans? (Single-select)
Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Muskoka, Parry Sound and Algonquin Park. (n=399)

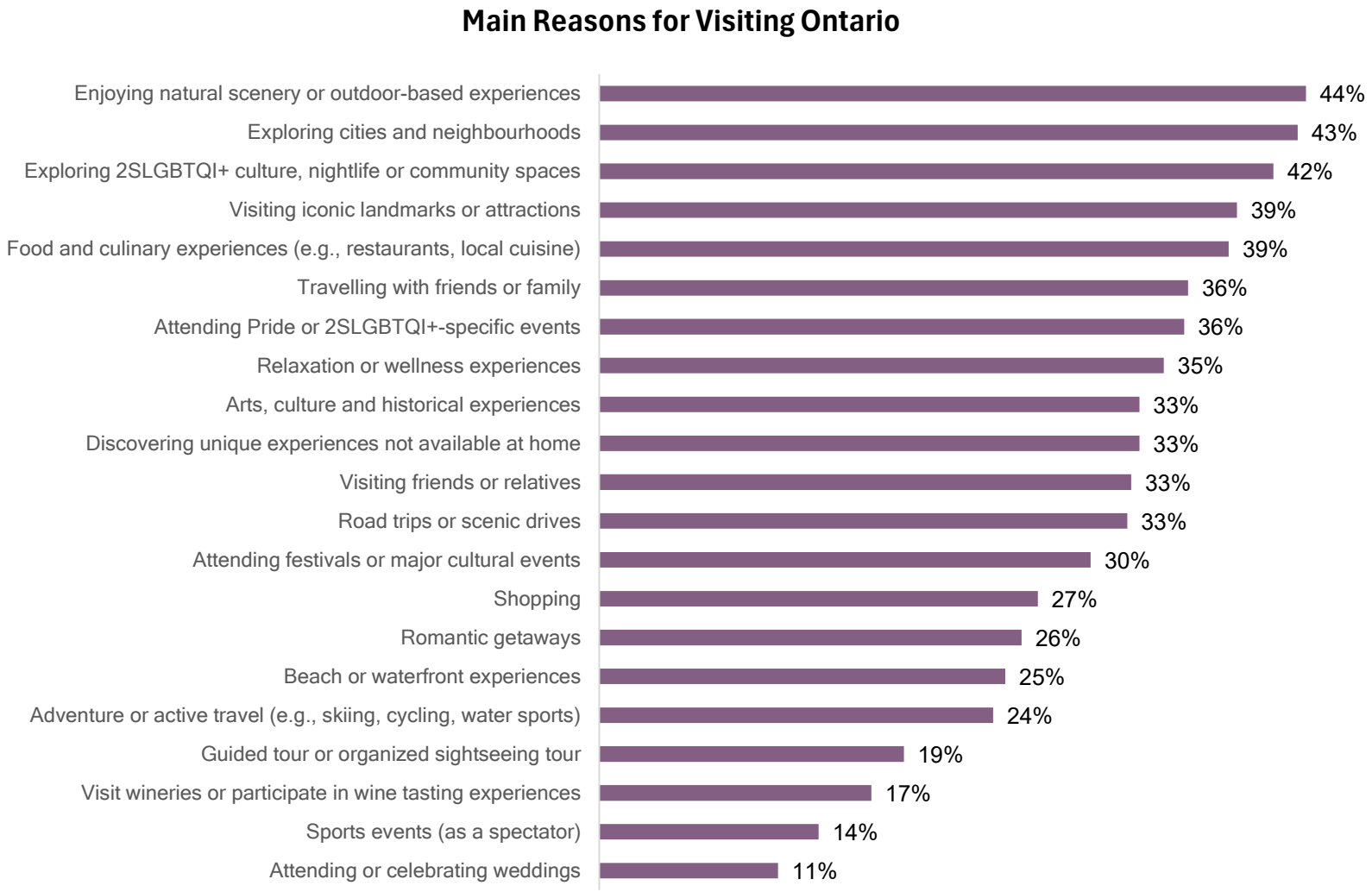
ONTARIO TRIP PURPOSE

Natural scenery and outdoor experiences lead the list of Ontario trip motivations among those aware of Muskoka, Parry Sound and Algonquin Park.

City exploration and 2SLGBTQI+ culture follow closely in a near-tie, with iconic landmarks and food and culinary experiences rounding out the upper range. Travelling with friends or family and attending Pride and 2SLGBTQI+-specific events sit alongside one another in the mid-upper range, reflecting that social and identity-driven motivations carry comparable weight for this audience.

Relaxation and wellness, arts and culture, and discovering unique experiences form a consistent middle cluster, reinforcing that Ontario's appeal rests on a combination of mainstream leisure strengths and identity-relevant experiences.

Wineries, sports events, and weddings rounded out the bottom of the list when it came to reasons for visiting.



T2 What are the main reasons you would consider taking an overnight leisure trip in Ontario, Canada? Please select all that apply
Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Muskoka, Parry Sound and Algonquin Park. (n=399)

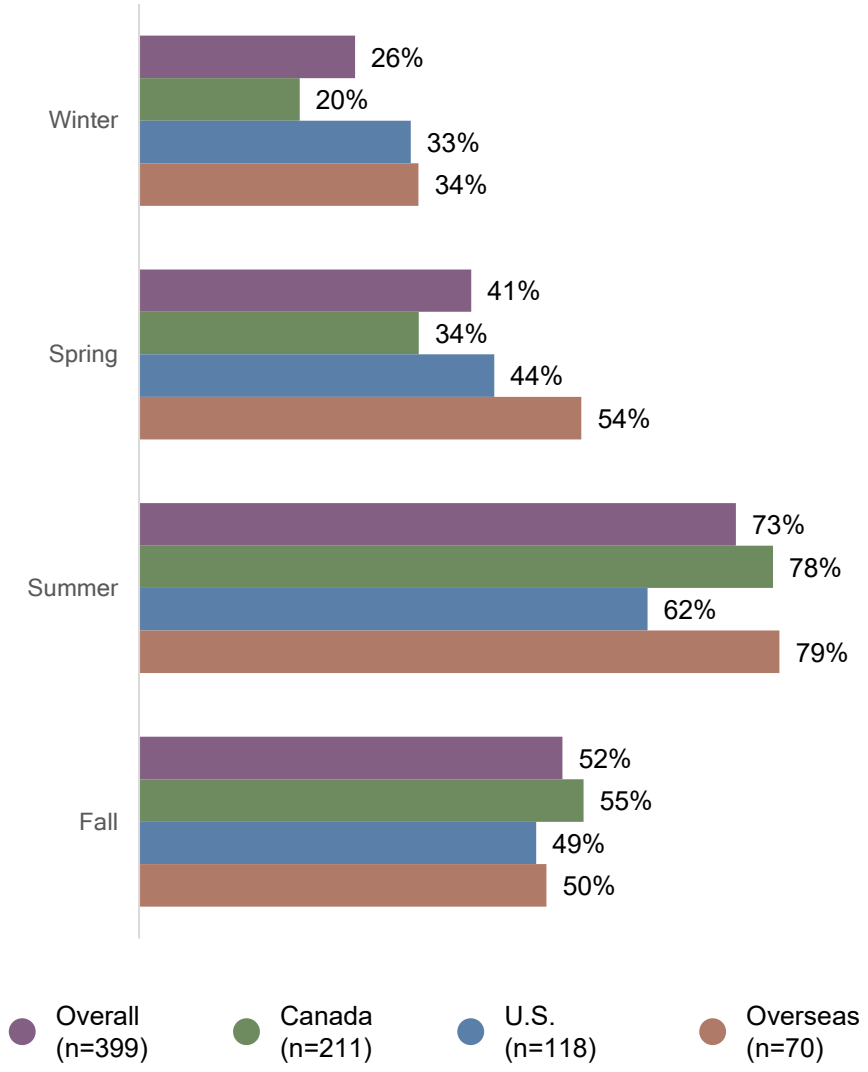
ONTARIO TRIP: PREFERRED MONTHS OF TRAVEL

Summer travel to Ontario dominates across domestic and international markets.

2SLGBTQI+ travellers aware of Muskoka, Parry Sound and Algonquin Park are actively considering trips to Ontario, with interest peaking in the summer across all key markets. Overseas and Canadian respondents show nearly identical and strong summer consideration, while U.S. respondents trail both markets more noticeably.

The consideration for fall is a secondary window, with Canadian respondents leading ahead of overseas and U.S. travellers.

Overseas respondents show notably stronger spring consideration than either Canada or the U.S., while winter consideration is highest among overseas and U.S. respondents — pointing to a meaningful off-peak opportunity for this market across multiple seasons.



T3 Which month(s) are you considering for an overnight leisure trip in Ontario, Canada? Please select all that apply
Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Muskoka, Parry Sound and Algonquin Park. (n=399)

ONTARIO TRIP: ACCOMMODATION PREFERENCES

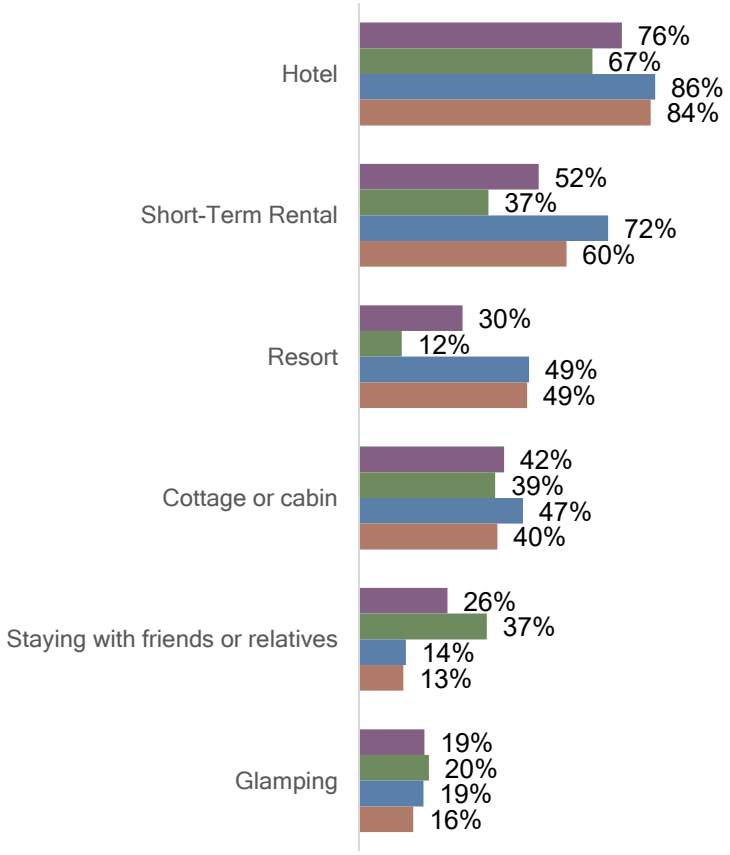
Hotels are the dominant accommodation choice across all markets, but meaningful differences emerge in tier preferences and alternative formats.

Short-term rentals are a strong secondary option, particularly for U.S. travellers. Both international markets also show notably stronger resort interest than Canada, where resort selection is the lowest.

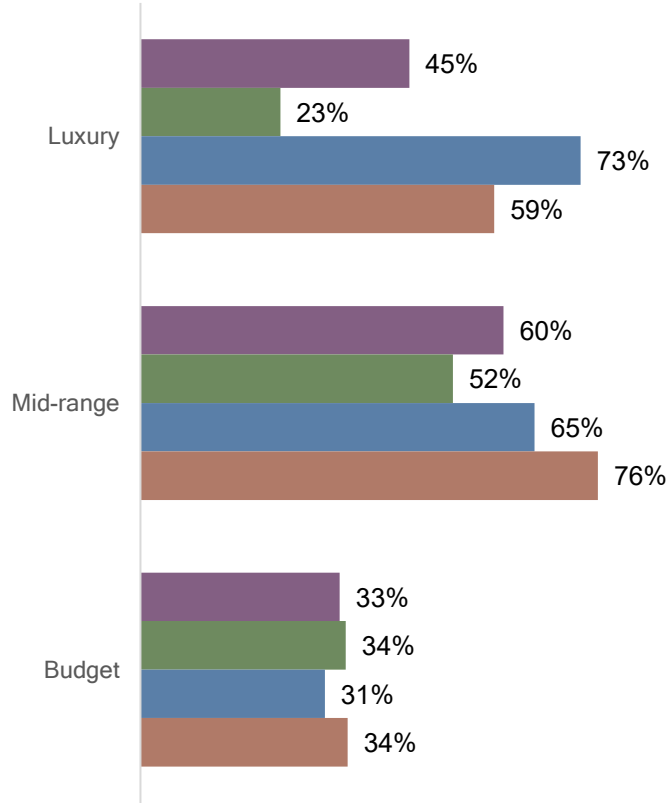
Within tier preferences, U.S. travellers show the strongest luxury orientation while overseas respondents lead considerably on mid-range. Canadian domestic respondents sit well below on luxury and are considerably more likely than either international market to stay with friends or relatives. Budget remains broadly consistent across all markets.

Cottages and cabins attract steady interest across all markets, pointing to a viable rural accommodation product.

Accommodation Type



Luxury Preferences





T7 Where would you most likely stay on an overnight leisure trip in Ontario, Canada? Please select all that apply.
Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Muskoka, Parry Sound and Algonquin Park. (n=399)

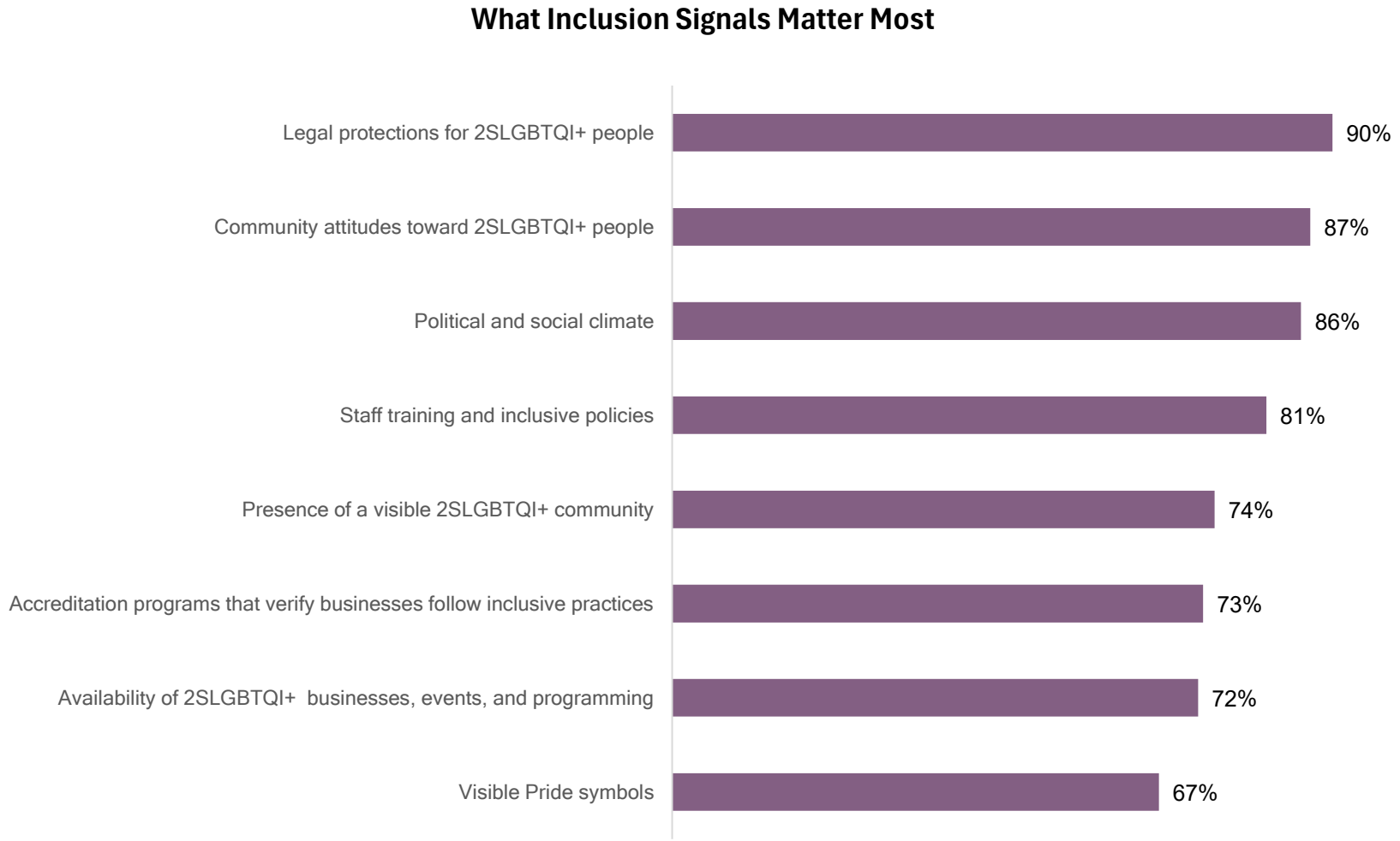
WHAT INCLUSION SIGNALS MATTER MOST

When choosing a destination, 2SLGBTQI+ travellers aware of Muskoka, Parry Sound and Algonquin Park apply a clear two-tier hierarchy of inclusion signals.

Structural factors are most important. Legal protections, community attitudes, and political and social climate sit at the top of the ranking across all markets and identity groups.

Operational signals form a second tier, with visible Pride symbols ranking last among the eight signals tested.

Travellers who find community attitudes, visible community presence, and accreditation programs important are considerably more likely to be considering Ontario than those who do not. Despite ranking sixth overall, accreditation emerges as one of the strongest drivers of consideration.



S2 How important are the following when choosing a leisure travel destination?
Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Muskoka, Parry Sound and Algonquin Park. (n=399)

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