CRG

CONTEXT
RESEARCH
GROUP

DESTINATION
ONTARIO

In partnership with Destination Ontario

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ONTARIO TRAVEL & TOURISM MONTHLY
December 2025

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ONTARIO TRAVEL & TOURISM MONTHLY (OTTM)

Ontario Travel & Tourism Monthly (OTTM) is a research study created by CRG in partnership with Destination Ontario, delivering monthly insights into Ontario's evolving tourism landscape. The OTTM is built specifically for Ontario and provides reliable ongoing metrics on economics, social factors, safety, climate, AI usage, and more across priority domestic and international markets.

All monthly OTTM releases are available on the Destination Ontario Insights Portal (DO-IP): **DOinsights.crg.ca**

Each month we survey **2,000 travellers** from:

- Ontario
- Manitoba
- Western Canada
- Quebec
- Atlantic Canada
- key U.S. markets

With an **annual** sample of **24,000 travellers**, OTTM builds a robust foundation of insights that strengthen over time, enabling Ontario's travel industry to identify emerging trends and anticipate shifts with greater accuracy.

OTTM empowers the Ontario tourism sector to act with speed and confidence, offering precise, real-time insights drawn from **high-value potential travellers**.

By tracking travel intentions and sentiments monthly, the program equips industry leaders to make informed, proactive decisions, allowing them to adapt ahead of market changes and stay competitive in the evolving tourism landscape.

MONTHLY METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:
- Resident of Ontario, U.S. Drive (Michigan, Ohio, Upstate NY), U.S. Fly (NYC, Chicago), Western Canada, Manitoba, Quebec, and Atlantic Canada
- 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 U.S. Fly

Sample Size:
- Total (n=2,025)
- Ontario (n=506)
- U.S. Drive (n=253)
- U.S. Fly (n=253)
- Western Canada (n=253)
- Manitoba (n=253)
- Quebec (n=253)
- Atlantic Canada (n=254)

Fieldwork Date:
- December 5th – 16th, 2025

Median Length of Interview:
- 14.7 minutes

Margin of Error:
- Ontario: ± 4.6%
- U.S. Drive: ± 6.1%
- U.S. Fly: ± 6.2%
- Western Canada: ± 5.9%
- Manitoba: ± 6.4%
- Quebec : ± 6.0%
- Atlantic Canada: ± 5.8%

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

METRICS AND COLOUR CODING

Rolling Averages
Data presented across the report uses a 3-month rolling average to smooth monthly fluctuations and provide clearer trend visibility. Each new month of results is added, and the oldest month is removed.

Rolling Average (RA) Change
RA Change refers to the comparison between the current 3-month rolling average and the previous 3-month rolling average. This approach helps identify meaningful trends while minimizing the impact of seasonal variations that may affect individual monthly data points.

MoM Change
Refers to the use of Month-over-Month (MoM) data comparisons while Year-over-Year (YoY) comparison is pending. Please note that MoM comparisons may be affected by seasonality.

Significant Changes
Significant changes are highlighted using color coding for easy interpretation: Green indicates significant increases; while red indicates significant declines.

TERMINOLOGY – MARKETS & COMPARISONS

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

For this study, the U.S. Drive markets include:
• Michigan: Detroit, Ann Arbor, Lansing
• New York: Albany, Rochester, Syracuse, Buffalo
• Ohio: Cleveland, Toledo

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

For this study, the U.S. Fly markets include:
• Chicago
• New York City

Western Canada
Refers to the provinces of British Columbia, Alberta and Saskatchewan.

Atlantic Canada
Refers to the provinces of New Brunswick, Nova Scotia, Prince Edward Island, and Newfoundland and Labrador.

EXECUTIVE SUMMARY

Interest in travelling to Ontario remains steady. Travellers are planning further ahead, with mid-term trips on the rise and short-term visits easing across markets. Summer remains Ontario's anchor season, with Toronto and Niagara continuing to attract the most visitors. Manitoba in particular, has seen a marked uptick in day trips to the province.

Ontario retains its reputation as a desirable travel destination. Travellers continue to view the province as offering unique, memorable experiences and being ideal for short, accessible getaways, maintaining a steady level of advocacy.

Interest in seeking travel information about Ontario has softened, though travellers still rely on internet searches and review platforms to plan their trips. Among social media platforms, Instagram leads for travel discovery, while the use of AI tools primarily supports attraction research and trip inspiration.

Travellers increasingly view travel as a worthwhile investment, with notable regional variations. Exchange rate sensitivity has dropped in U.S. Drive markets, while Atlantic Canadian travellers are more encouraged to visit Ontario due to unfavorable international exchange rates. Financial pressures overall remain steady.

Wildfires and sustainable tourism considerations vary by market. U.S. Drive travellers are reporting less disruption from wildfires, while Atlantic Canadians are showing greater commitment to sustainable tourism when planning trips.

Toronto's role as a FIFA 2026 host city is widely recognized and generates mixed interests, with strong awareness and visit motivation among Ontarians and U.S. Fly travellers, but limited influence on most other markets.

KPI – 3 MONTH ROLLING AVERAGE

ONTARIO	U.S. DRIVE	U.S. FLY
Travel Intent In The Next 12 Months		
80%	59%	65%
-	-4%	-3%
Travel Info Search		
51%	60%	74%
-5%	-2%	-1%
Travel Worthwhile Investment		
69%	72%	83%
+1%	-1%	-

KPI – 3 MONTH ROLLING AVERAGE

WESTERN CA	MANITOBA	QUEBEC	ATLANTIC CA
Travel Intent In The Next 12 Months			
47%	55%	49%	59%
+2%	+1%	+2%	+2%
Travel Info Search			
60%	55%	54%	54%
-1%	-	-2%	-1%
Travel Worthwhile Investment			
63%	71%	51%	66%
-1%	+4%	-2%	+2%

All metrics displayed represent a 3-month rolling average. The change shown reflects movement compared to the previous rolling average period.
Colour coding: Green = significant increase I Red = significant decrease I Grey = no significant change

Ottawa

TRAVEL DESTINATION PLANS

Interest in travelling to Ontario remains strongest among Ontario residents and visitors from the U.S. market. Within the province, Toronto and the Niagara Region continue to be the most considered destinations. The summer season dominates in planned travel, while across all markets, the mid-term window shows the greatest momentum.

Tags - Explore more on DOinsights.crg.ca

Travel Intent   Number of Trips   Month of Travel

LIKELIHOOD OF TRAVELLING IN ONTARIO

Interest in travelling to Ontario remains strongest among Ontario residents, followed by those in the U.S. markets, and Atlantic Canada.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	80%							-
US Drive	59%							-4
US Fly	65%							-3
Western Canada	47%							+2
Manitoba	55%							+1
Quebec	49%							+2
Atlantic Canada	59%							+2

S5. In the next 12 months, how likely are you to take a pleasure trip of one or more nights in Ontario, Canada? (Excludes "don't know") (5-point scale)
All respondents (n= 5,998)

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TRAVEL PLANS IN ONTARIO – NEXT 12 MONTHS

Ontario residents continue to drive the majority of travel activity within the province, with both overnight and day trips outpacing other markets. Regional variations persist, with Manitoba seeing an increase in the number of day trips taken to Ontario.

Average

Market	Overnight trips	Day trips	RA Change (overnight)	RA Change (day)
Ontario	1.7	3.2	-0.1	-0.2
US Drive	1.1	1.0	-0.1	-0.1
US Fly	1.5		-	-
Western Canada	0.8		+0.1	-
Manitoba	1.0	1.0	+0.1	+0.2
Quebec	0.8	0.9	-	-0.1
Atlantic Canada	1.0		-	-

■ Number of overnight trips   ■ Number of day trips

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=6,072) / Respondents from Ontario, U.S. Drive, Manitoba, & Quebec. S9 (n=3,795)

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PLANNED MONTHS OF TRAVEL

Summer is the most popular travel period to Ontario, with June and August being the peak months as travel intent continues to rise.

Note: The greyed-out month is the current survey month.

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Month	%	RA Change
January	10%	-
February	10%	-
March	13%	-
April	13%	-1
May	19%	-
June	27%	+4
July	24%	-3
August	27%	+6
September	13%	+2
October	8%	-4
November	8%	-4
December	13%	-4

S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=3,557)

TRAVEL WINDOW: ONTARIO & U.S. VISITORS

The number of near-term trips to Ontario has decreased among Ontarians and U.S. travellers. Conversely, trips planned for the mid-term period have increased from Ontario and the U.S. Drive markets.

Near-term = <2 months ahead | Mid-term = 3-6 months ahead | Long-term = 7-12 months ahead

	Ontario		U.S. Drive		U.S. Fly	
Near	27%	-8 ▼	21%	-7 ▼	32%	-1 ▼
Mid	51%	+7 ▲	55%	+8 ▲	52%	+4 ▲
Long	72%	+2 ▲	54%	-2 ▼	58%	+2 ▲

Note:
Bar = % of current month | ▲ ▼ = MoM Change

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TRAVEL WINDOW: OTHER CANADIAN MARKETS

The share of near-term trips to Ontario has decreased across Canadian markets; while the considerations for mid-term trips has increased.

Near-term = <2 months ahead | Mid-term = 3-6 months ahead | Long-term = 7-12 months ahead

	Western Canada	Manitoba	Quebec	Atlantic Canada
Near	15% -6▼	14% -	22% -6▼	17% -5▼
Mid	49% +13▲	38% +8▲	42% +8▲	45% +7▲
Long	62% -	70% -2▼	66% +1▲	64% -

Note:
Bar = % of current month | ▲▼ = MoM Change
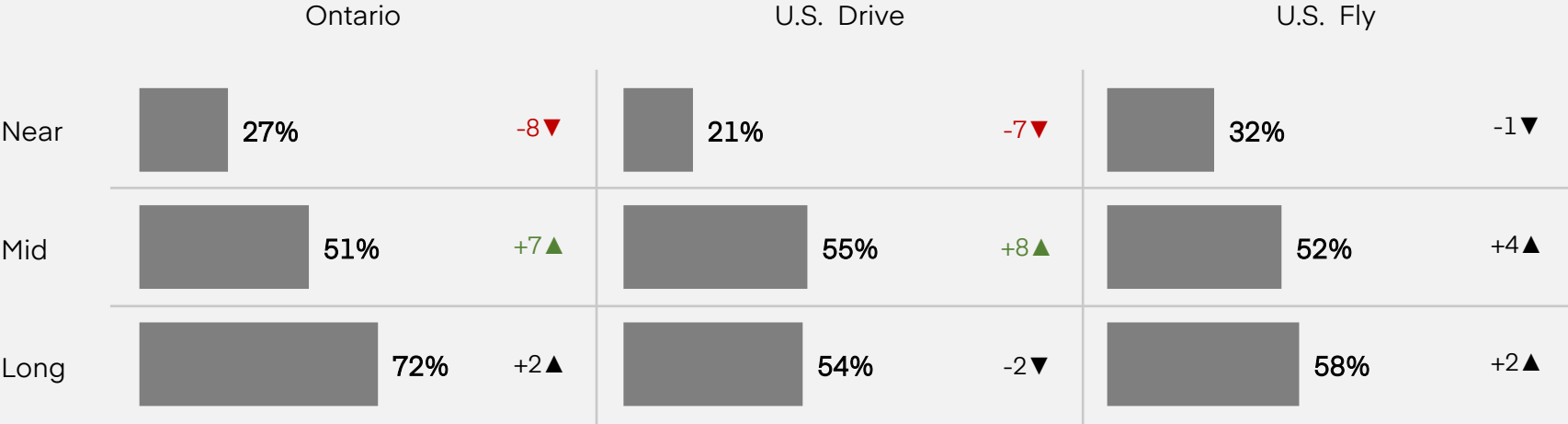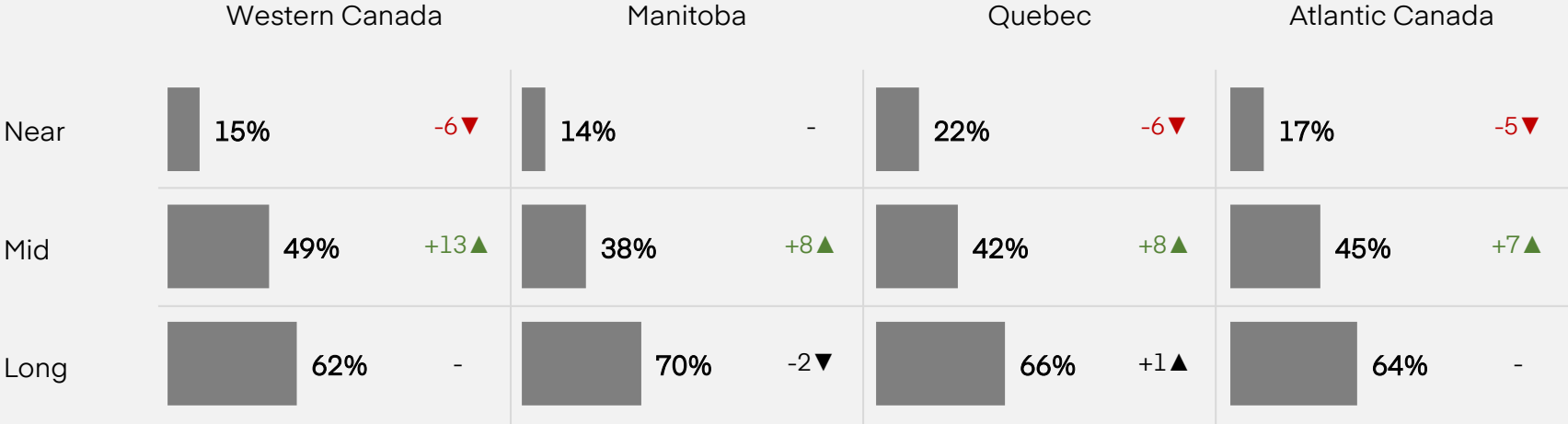
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S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=3,708)

DESTINATION ONTARIO

Toronto and the Niagara Region are the top destinations under consideration, with nearly half of travellers thinking about visiting for a pleasure trip in the next 12 months. Ottawa follows, with about a quarter expressing intent. This pattern has been consistent with the previous month.

Destination	%	RA Change
Toronto	50%	-1
Niagara Region	45%	-
Ottawa	26%	-1
Muskoka, Parry Sound and Algonquin Park	17%	-
Southeastern Ontario	16%	-1
Northern Ontario	16%	-
Southwest Ontario	14%	-1
Bruce, Grey and Simcoe Counties	14%	-
Kawarthas and Northumberland	9%	-
Hamilton, Halton and Brant Areas	9%	-1
Huron, Perth, Waterloo and Wellington Counties	8%	-1
Haliburton Highlands and Ottawa Valley	8%	-
York, Durham and Headwaters Regions	7%	-
Mississauga	7%	-
Brampton	3%	-

Q1B. Which destination(s) in Ontario, Canada are you seriously considering for a pleasure trip in the next 12 months? (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=3,516)

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BRAND PERCEPTION

Ontario maintains a strong reputation as a top leisure destination, celebrated for its unique experiences and overall value. Popular activities vary by season, with dining and shopping leading in winter, while spring and summer see interest in shopping, beaches, and family outings. Scenic drives and shopping define fall visitation. Advocacy remains strongest among Ontarians and U.S. Fly visitors, but regional differences in net promoter scores persist.

Tags - Explore more on DOinsights.crg.ca

Travel Season   Seasonal Activities   Rating of Ontario   Perceived Value

♀ **Muskoka**

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SEASONAL TRAVEL INTENT

Two thirds of travellers planning a trip to Ontario are considering summer as their preferred travel period. Summer travel intent has significantly increased from the previous month; while winter and fall intent have decreased.

RA Change

Season	Percentage	RA Change
Winter (December - February)	28%	-4
Spring (March - May)	41%	+1
Summer (June - August)	59%	+7
Fall (September - November)	26%	-4

*Market analysis is available in the detailed data export on the DO Insights Portal

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S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Multi-select) Respondents who are planning a trip in Ontario in the next 12 months. (n=3,557)

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TOP WINTER ACTIVITIES

Dining and shopping top the list of planned winter activities for Ontario visitors, closely followed by family attractions, festivals, and holiday markets. This theme has been consistent since the previous month.

*Market analysis is available in the detailed data export on the DO Insights Portal

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Activity	Percentage
Dining at local restaurants	51%
Shopping	50%
Family attractions	42%
Winter festivals	38%
Holiday markets	34%
Nightlife	31%
Spa or wellness retreats	31%
Visiting museums	30%
Brewery or distillery visits	29%
Touring historic sites	27%
Ice skating	23%
Visiting art galleries	23%
Winery tours	23%
Maple syrup experiences	19%
Guided tours	17%
Snowboarding	16%
Snowmobiling	16%
Downhill skiing	14%
Ice fishing	14%
Cross-country skiing	13%
Snowshoeing	12%
Horse-drawn sleigh rides	12%
Dog sledding	9%

Q1BA. Thinking about your next planned pleasure trip to Ontario, Canada in the winter, which specific activities would you participate in? (Multi-select)
Respondents who are thinking about travelling during the Winter months. (n=958)
Only overall ≥ *5% shown*

TOP SPRING/SUMMER ACTIVITIES

Shopping, family attraction, and visiting beaches lead as top spring and summer activities for Ontario visitors.

Activity	Percentage
Shopping	47%
Family attractions	39%
Visiting beaches	38%
Food festivals	34%
Hiking	33%
Touring historical sites	33%
Patio dining	32%
Visiting museums	31%
Brewery or distillery visits	26%
Cultural festivals	25%
Music festivals	25%
Camping	24%
Nightlife	23%
Winery tours	23%
Boat cruises	21%
Spa or wellness retreats	20%
Visiting art galleries	18%
Guided tours	16%
Farm-to-table dining experiences	15%
Fishing	15%
Kayaking	15%
Canoeing	13%
Cycling trails	11%
Golfing	10%
Mountain biking	8%

*Market analysis is available in the detailed data export on the DO Insights Portal

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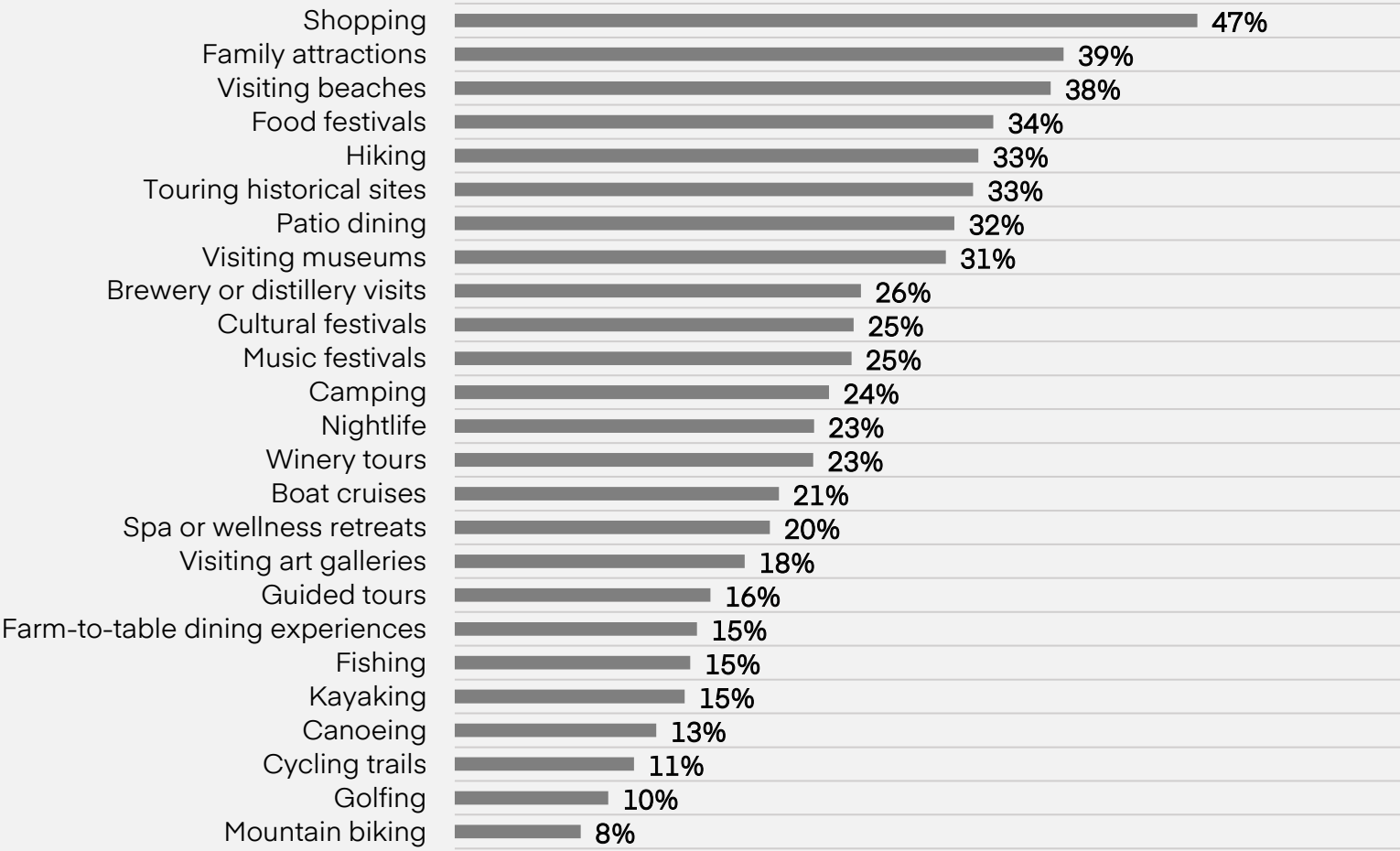Q1BB. Thinking about your next planned pleasure trip to Ontario, Canada in the spring or summer, which specific activities would you participate in? (Multi-select)
Respondents who are thinking about travelling during the Spring/Summer months. (n=2,809)
Only overall ≥ *5% shown*

TOP FALL ACTIVITIES

Shopping, scenic fall drives, and food festivals top the list of planned activities for visitors to Ontario during the fall season.

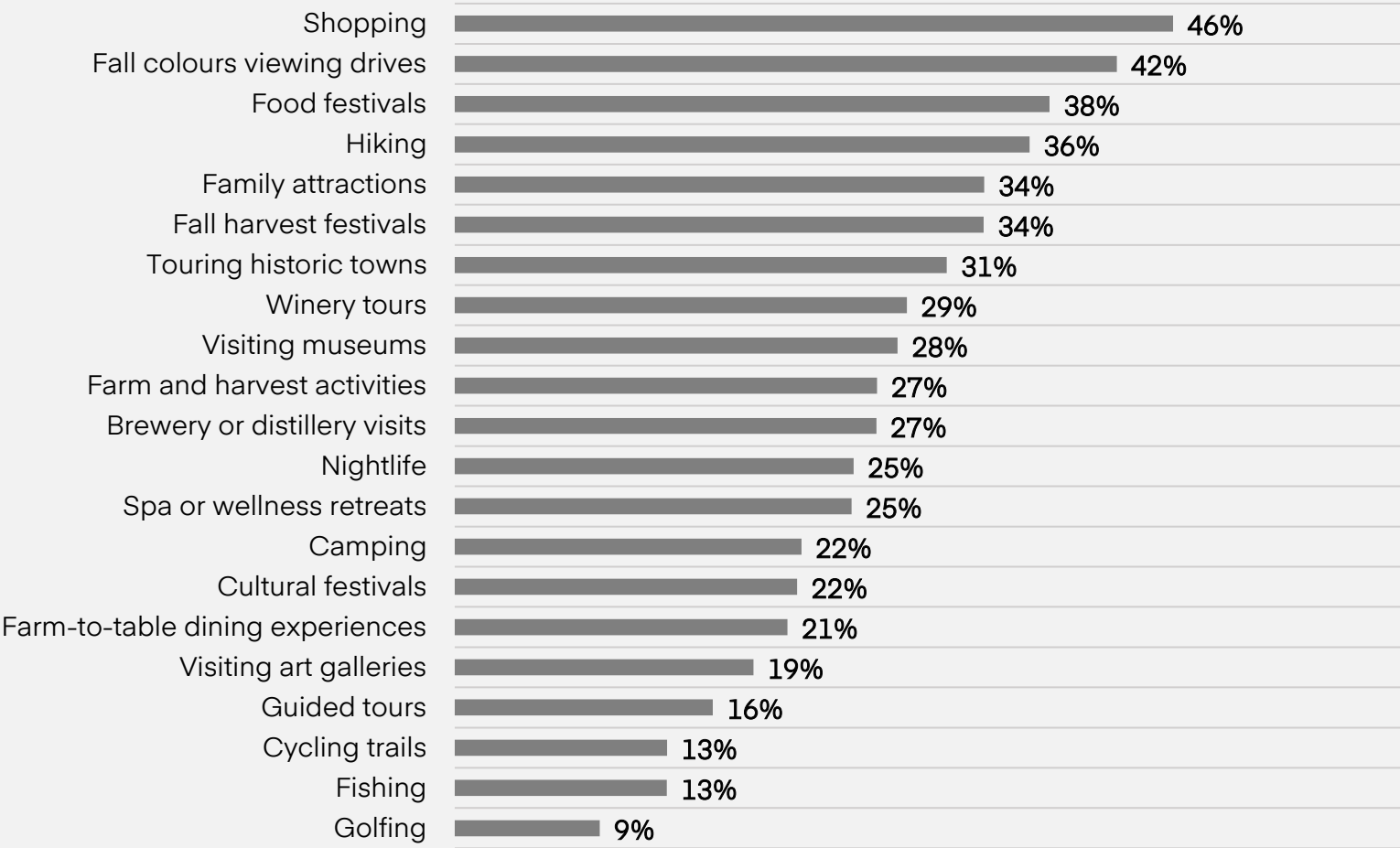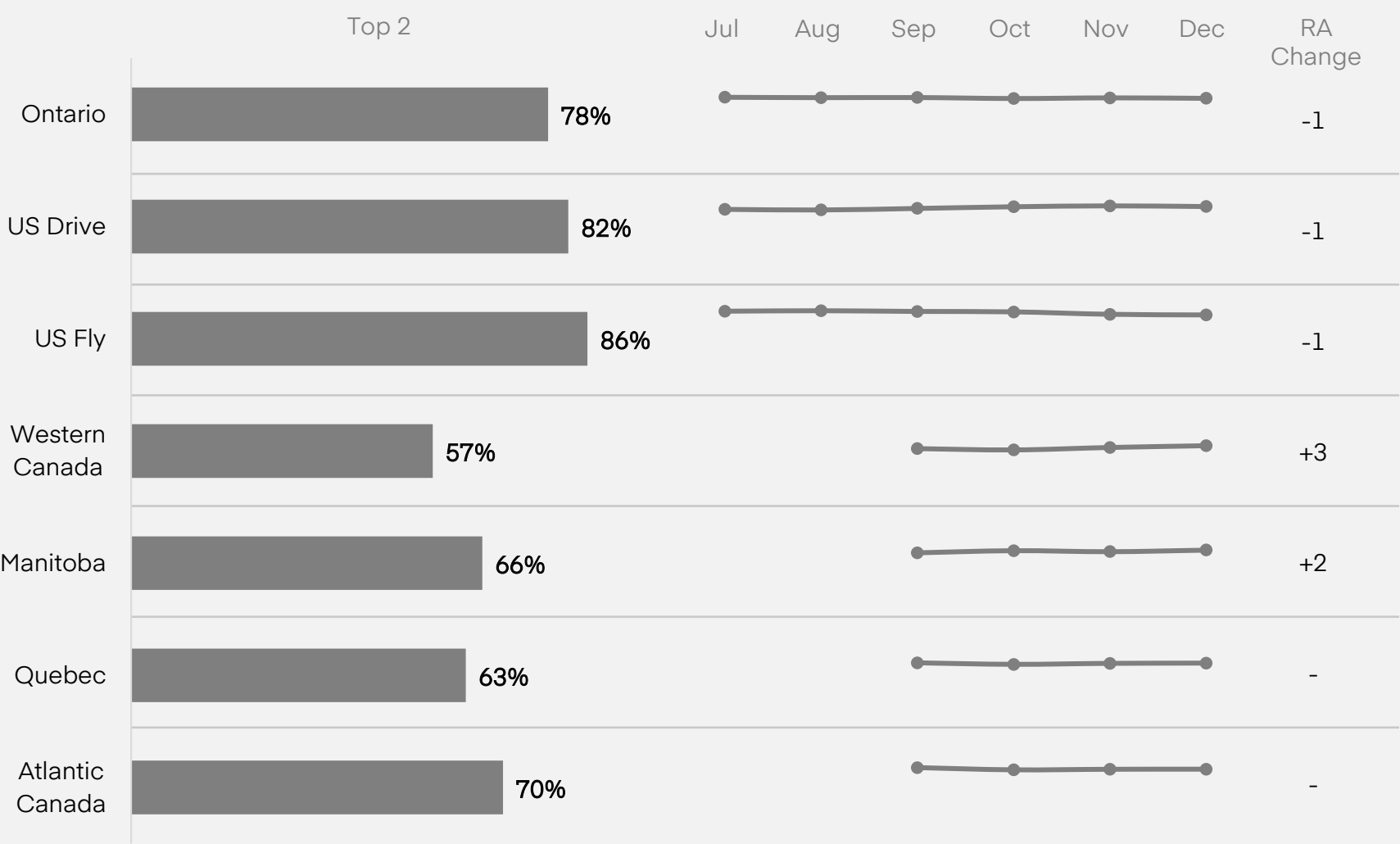| Activity	Percentage
Shopping	46%
Fall colours viewing drives	42%
Food festivals	38%
Hiking	36%
Family attractions	34%
Fall harvest festivals	34%
Touring historic towns	31%
Winery tours	29%
Visiting museums	28%
Farm and harvest activities	27%
Brewery or distillery visits	27%
Nightlife	25%
Spa or wellness retreats	25%
Camping	22%
Cultural festivals	22%
Farm-to-table dining experiences	21%
Visiting art galleries	19%
Guided tours	16%
Cycling trails	13%
Fishing	13%
Golfing	9%

*Market analysis is available in the detailed data export on the DO Insights Portal

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Q1BC. Thinking about your next planned pleasure trip to Ontario, Canada in the fall, which specific activities would you participate in? (Multi-select)
Respondents who are thinking about travelling during the Fall months. (n=887)
Only overall ≥ 5% shown

ONTARIO AS A PLEASURE TRAVEL DESTINATION

Ontario continues to be highly regarded as a destination for leisure travel, with seven in ten respondents expressing a positive view. This positive perception is higher in the two U.S. markets and Ontario.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	78%							-1
US Drive	82%							-1
US Fly	86%							-1
Western Canada	57%							+3
Manitoba	66%							+2
Quebec	63%							-
Atlantic Canada	70%							-

Q3. How would you rate Ontario, Canada as a pleasure travel destination? (5-point scale)
All respondents. (n=5,658)

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NET PROMOTER SCORE

Advocacy for Ontario as a travel destination remains strongest among Ontarians and U.S. Fly visitors.

	Detractor (0-6)	Passive (7-8)	Promoter (9-10)	NPS	RA Change
Ontario	28%	34%	38%	+10	+3
US Drive	36%	32%	32%	-3	-6
US Fly	30%	32%	39%	+9	-4
Western Canada	58%	27%	15%	-43	+3
Manitoba	47%	34%	19%	-28	+4
Quebec	47%	35%	18%	-29	-
Atlantic Canada	44%	34%	22%	-21	+5

● Detractor (0-6) ● Passive (7-8) ● Promoter (9-10)

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. (n=6,072)

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DESTINATION IMAGE OF ONTARIO

Ontario is widely recognized for delivering unique experiences and remains a top choice for short trips and for delivering the main things needed.

Top 2

	Top 2	RA Change
Provides unique experiences	79%	+1
Is good for a short trip	78%	+1
Delivers the main things I need	73%	-1
Is a culturally diverse travel destination	74%	-
Allows me to recharge	70%	-
Doesn't seem like a real vacation because it's so close to home (BTM2)	54%	-

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. (n=5,534)

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CONSUMER PERCEIVED VALUE

Overall, Ontario continues to be perceived as offering strong value to travellers, especially when it comes to the product and service quality offered. This sentiment remains consistent with the previous months.

Radar chart values:
- Price: 65%
- Risk: 84%
- Service Quality: 80%
- Environment: 82%
- Product Quality: 85%

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. (n=1,202)

TRAVEL INFORMATION RESEARCH

Travel information search is strongest among travellers from the U.S. Fly market. Most rely on internet searches, review sites, and social media, especially Instagram, YouTube, and Facebook, similar to the previous month. AI usage levels are unchanged from the previous month, with most travellers using these tools to research attractions, find destination ideas, and gather travel tips.
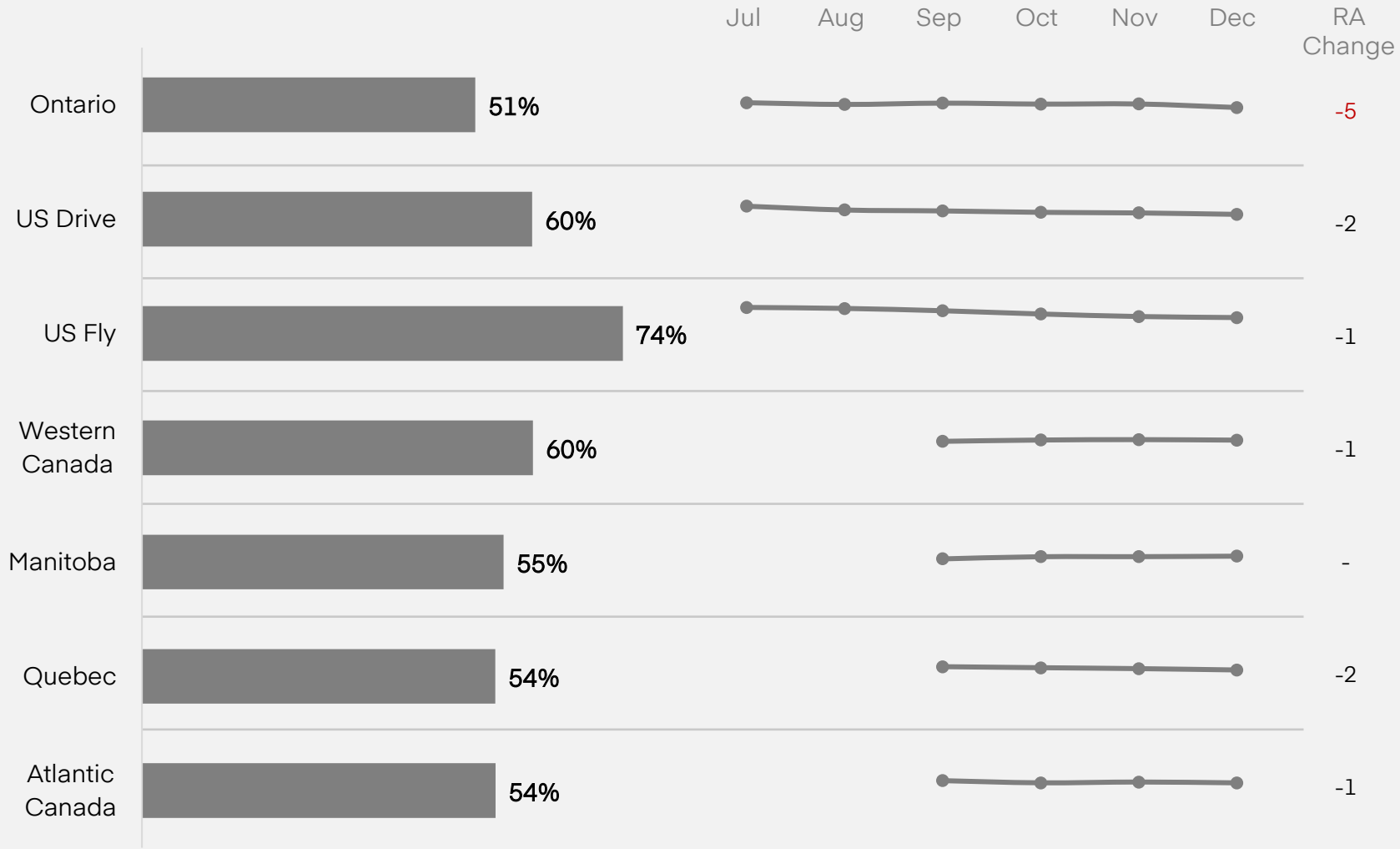
Tags - Explore more on DOinsights.crg.ca

Travel Information   Media Usage   AI tools

♀ **Terrace Bay Beach**
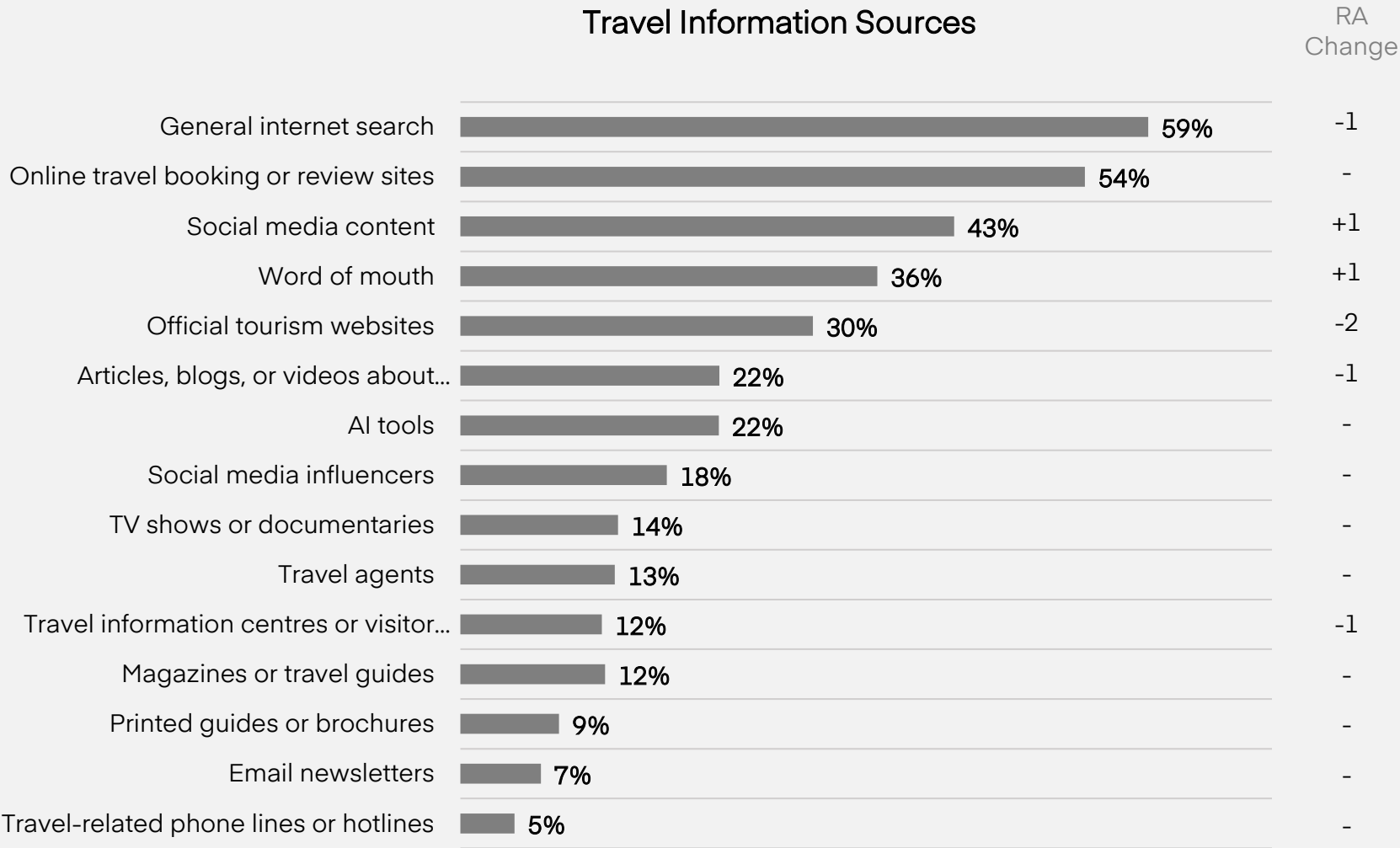
INFORMATION SEARCH

Looking for travel information is particularly strong among U.S. Fly visitors. This pattern has been consistent since the previous months, highlighting the ongoing engagement and intent to plan future trips from this market. Information seeking has significantly decreased in Ontario.

		RA Change
Ontario	51%	-5
US Drive	60%	-2
US Fly	74%	-1
Western Canada	60%	-1
Manitoba	55%	-
Quebec	54%	-2
Atlantic Canada	54%	-1

I1. In the past month, have you looked for information about travelling? (Single-select)
All respondents. (n=6,072)
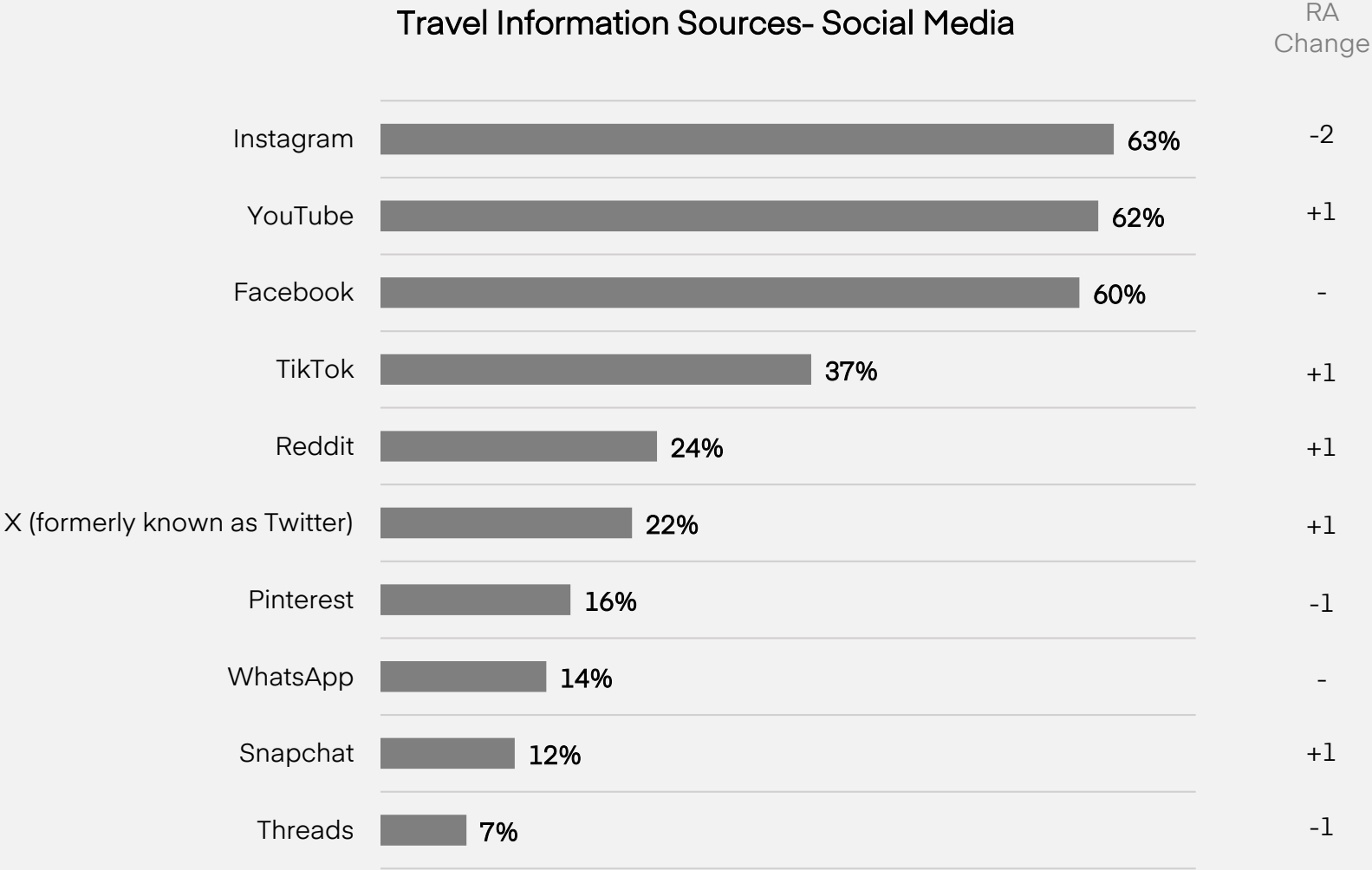
ONTARIO TRAVEL INFORMATION SOURCES

General internet search, online travel booking or review sites, and social media remain the primary sources travellers use when seeking information about visiting Ontario.

Travel Information Sources

Source	Percentage	RA Change
General internet search	59%	-1
Online travel booking or review sites	54%	-
Social media content	43%	+1
Word of mouth	36%	+1
Official tourism websites	30%	-2
Articles, blogs, or videos about...	22%	-1
AI tools	22%	-
Social media influencers	18%	-
TV shows or documentaries	14%	-
Travel agents	13%	-
Travel information centres or visitor...	12%	-1
Magazines or travel guides	12%	-
Printed guides or brochures	9%	-
Email newsletters	7%	-
Travel-related phone lines or hotlines	5%	-

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=3,482)
Only overall ≥ *5% shown*

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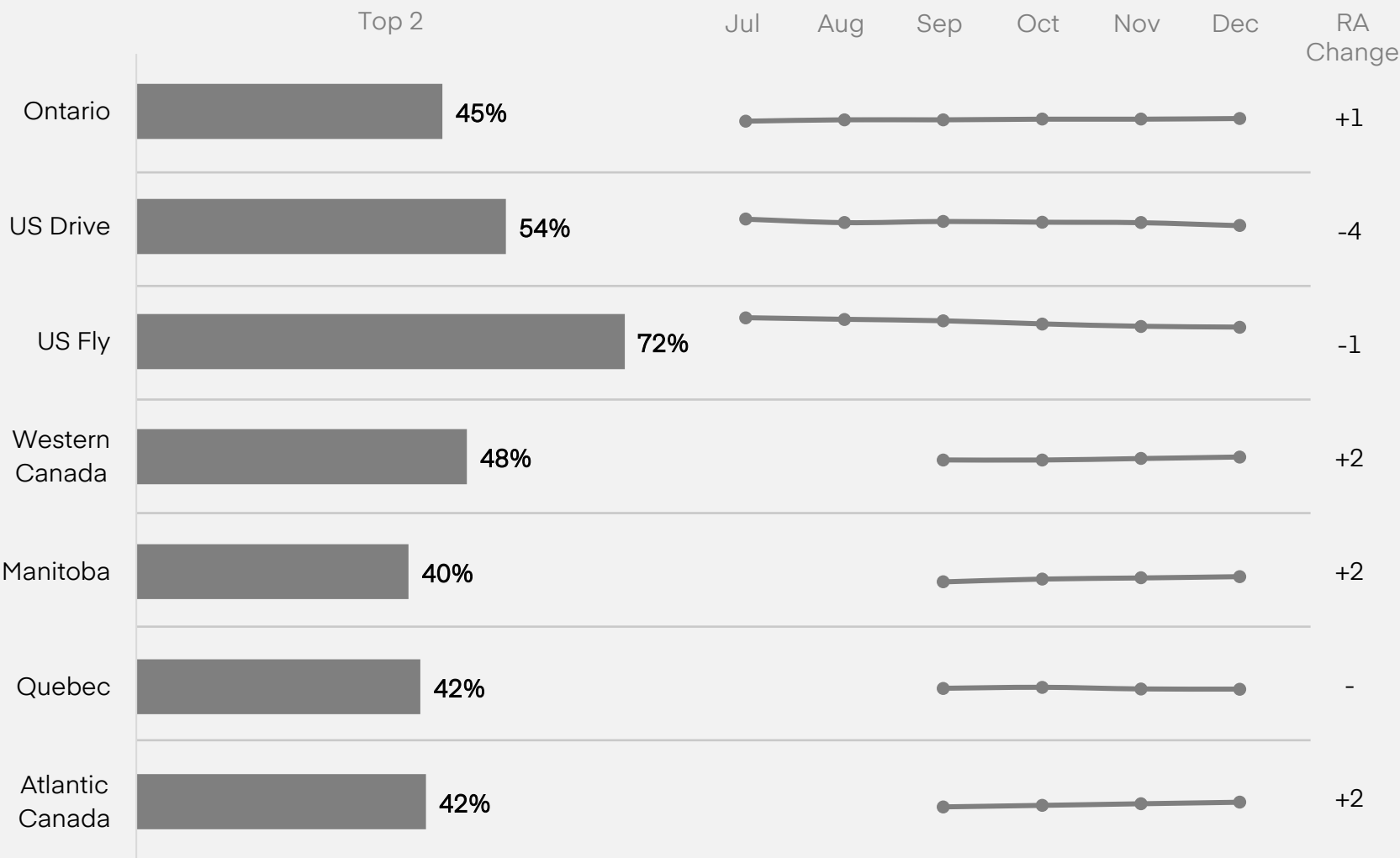
SOCIAL MEDIA USAGE FOR TRAVEL INFORMATION

Instagram, YouTube, and Facebook are the leading social media platforms used by travellers to obtain information about travelling, with Instagram being the most popular.

Travel Information Sources- Social Media

Platform	Percentage	RA Change
Instagram	63%	-2
YouTube	62%	+1
Facebook	60%	-
TikTok	37%	+1
Reddit	24%	+1
X (formerly known as Twitter)	22%	+1
Pinterest	16%	-1
WhatsApp	14%	-
Snapchat	12%	+1
Threads	7%	-1

I3. Which social media platforms did you use to obtain information about travelling? (Multi-select)
Respondents who use social media for travel information. (n=1,686)
Only overall ≥ 5% shown

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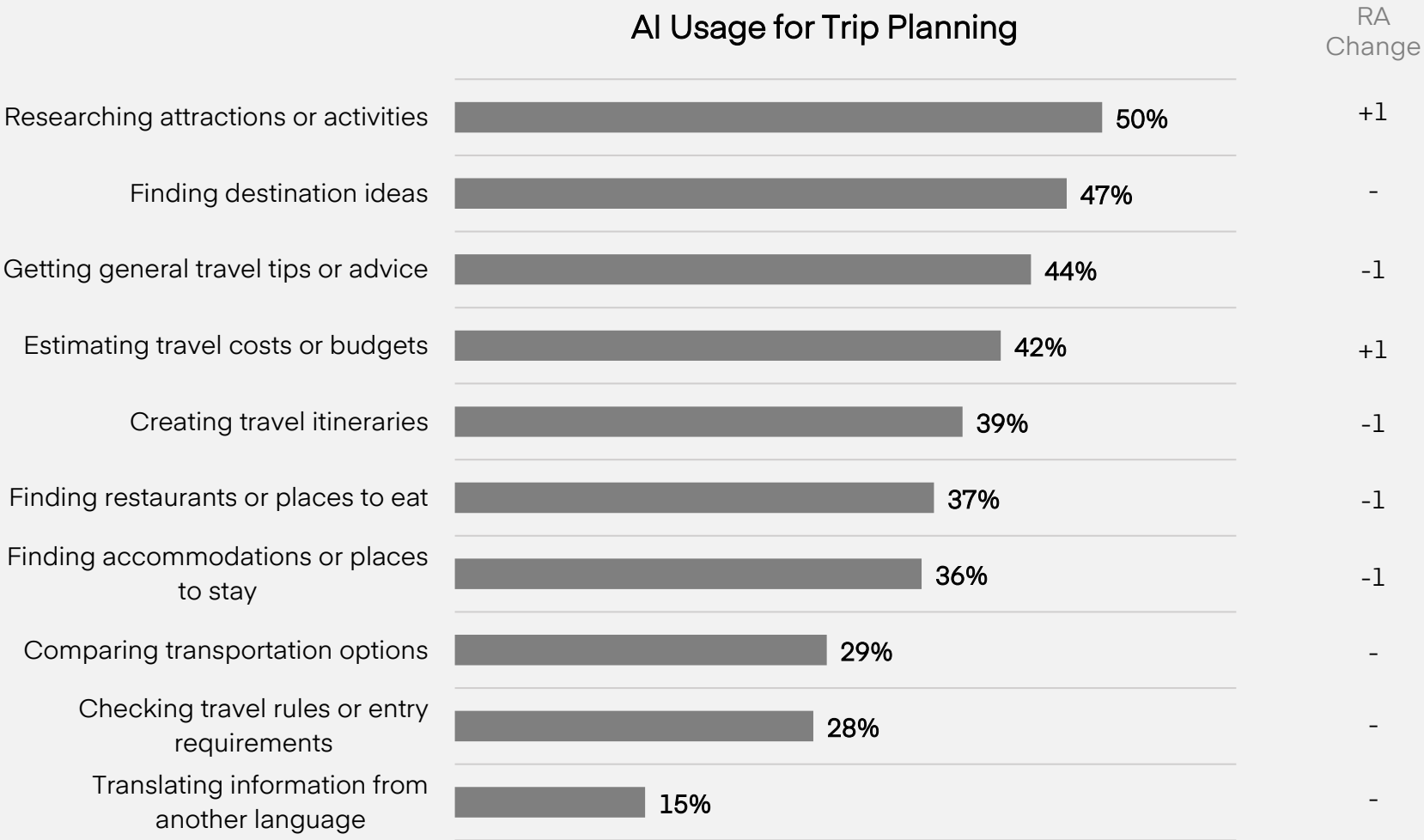
LIKELIHOOD OF USING AI TOOLS

Interest in using AI tools for trip planning is highest among U.S. travellers, especially the Fly market. Ontario and Canadian regions show more moderate intent.
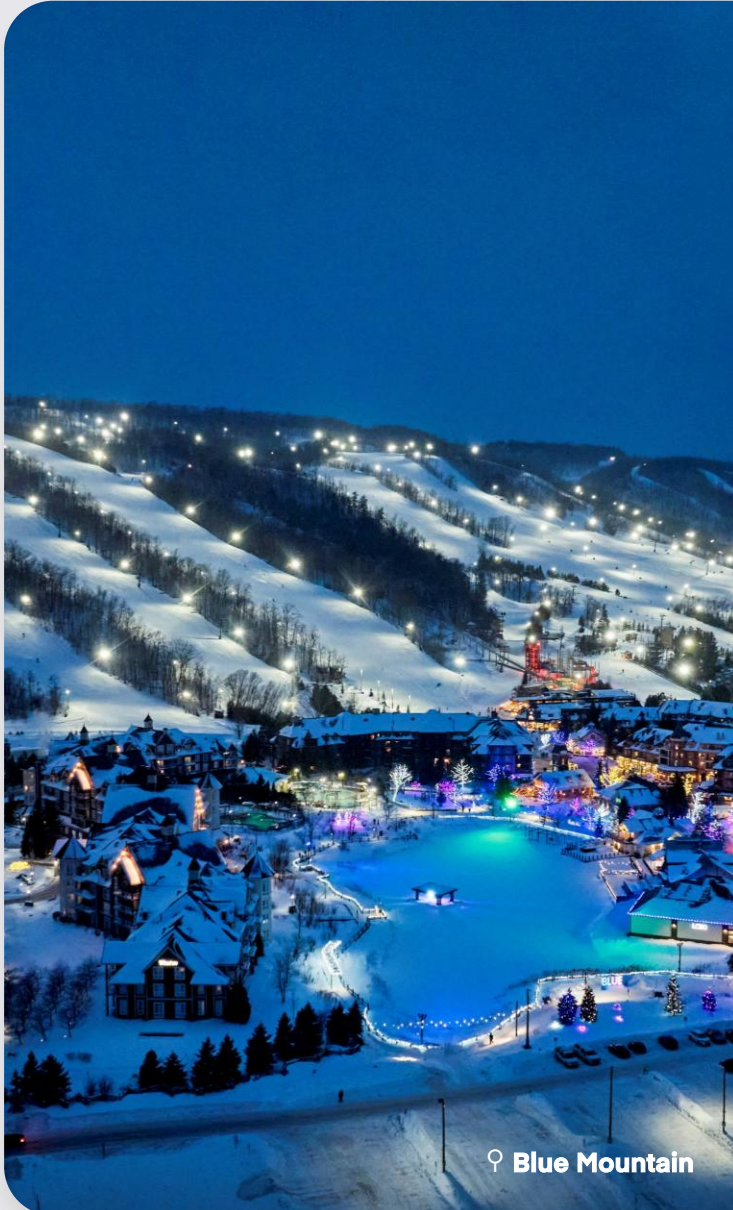
	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	45%							+1
US Drive	54%							-4
US Fly	72%							-1
Western Canada	48%							+2
Manitoba	40%							+2
Quebec	42%							-
Atlantic Canada	42%							+2

I6. How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next trip? (Excludes "don't know") (5-point scale)
Respondents who plan to take an overnight trip. (n=5,601)

AI ASSISTANCE IN TRAVEL PLANNING

The usage of AI has not changed from the previous month. Travellers primarily use AI tools to research attractions, discover destination ideas, and get travel tips, making these the top ways AI is integrated into trip planning.

AI Usage for Trip Planning

Activity	Usage	RA Change
Researching attractions or activities	50%	+1
Finding destination ideas	47%	-
Getting general travel tips or advice	44%	-1
Estimating travel costs or budgets	42%	+1
Creating travel itineraries	39%	-1
Finding restaurants or places to eat	37%	-1
Finding accommodations or places to stay	36%	-1
Comparing transportation options	29%	-
Checking travel rules or entry requirements	28%	-
Translating information from another language	15%	-

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=1,848)
Only overall ≥ *5% shown*

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PERCEPTION OF ECONOMIC AND POLITICAL CONDITIONS

Travellers continue to view travel as a worthwhile investment despite ongoing financial pressures, with most regions maintaining positive attitudes and only slight declines emerging for U.S. Drive. The exchange rate influence is gradually weakening for the U.S. markets. Perceptions of U.S. and Canada relations remain steady across the markets with small changes, while the influence of political and global instability on travel decisions remains steady overall, with rising sensitivity in several regions.

Tags - Explore more on DOinsights.crg.ca

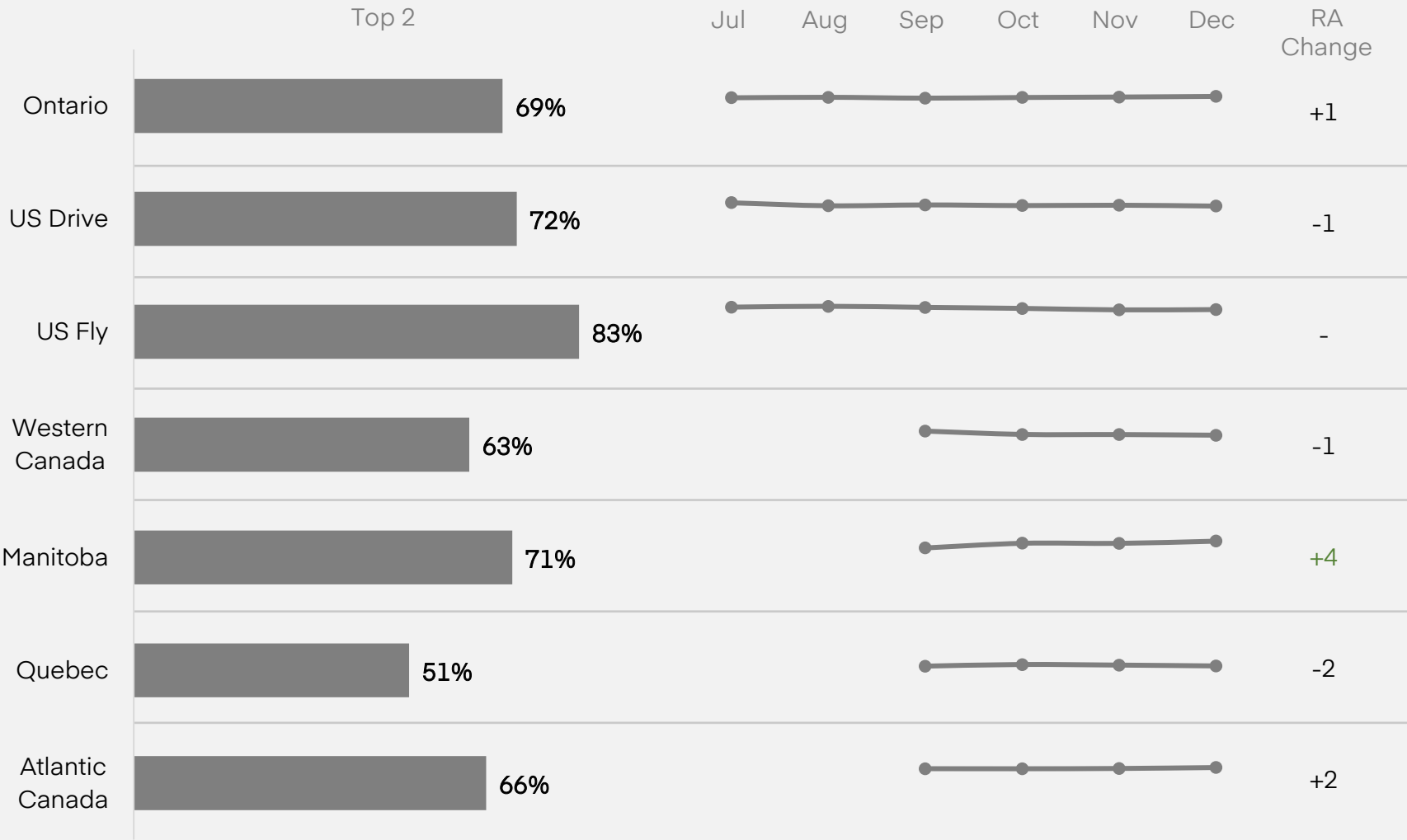Political Concerns   Exchange Rate   Financial Pressures   Payment Plans

Blue Mountain

TRAVEL AS A WORTHWHILE INVESTMENT

U.S. Fly travellers show high agreement that travel is a worthwhile investment.

Manitoba records a significant increase from the previous month in agreement, reflecting a steady rise in this sentiment since September 2025.

Overall, despite economic concerns, most regions continue to maintain positive attitudes toward travel.

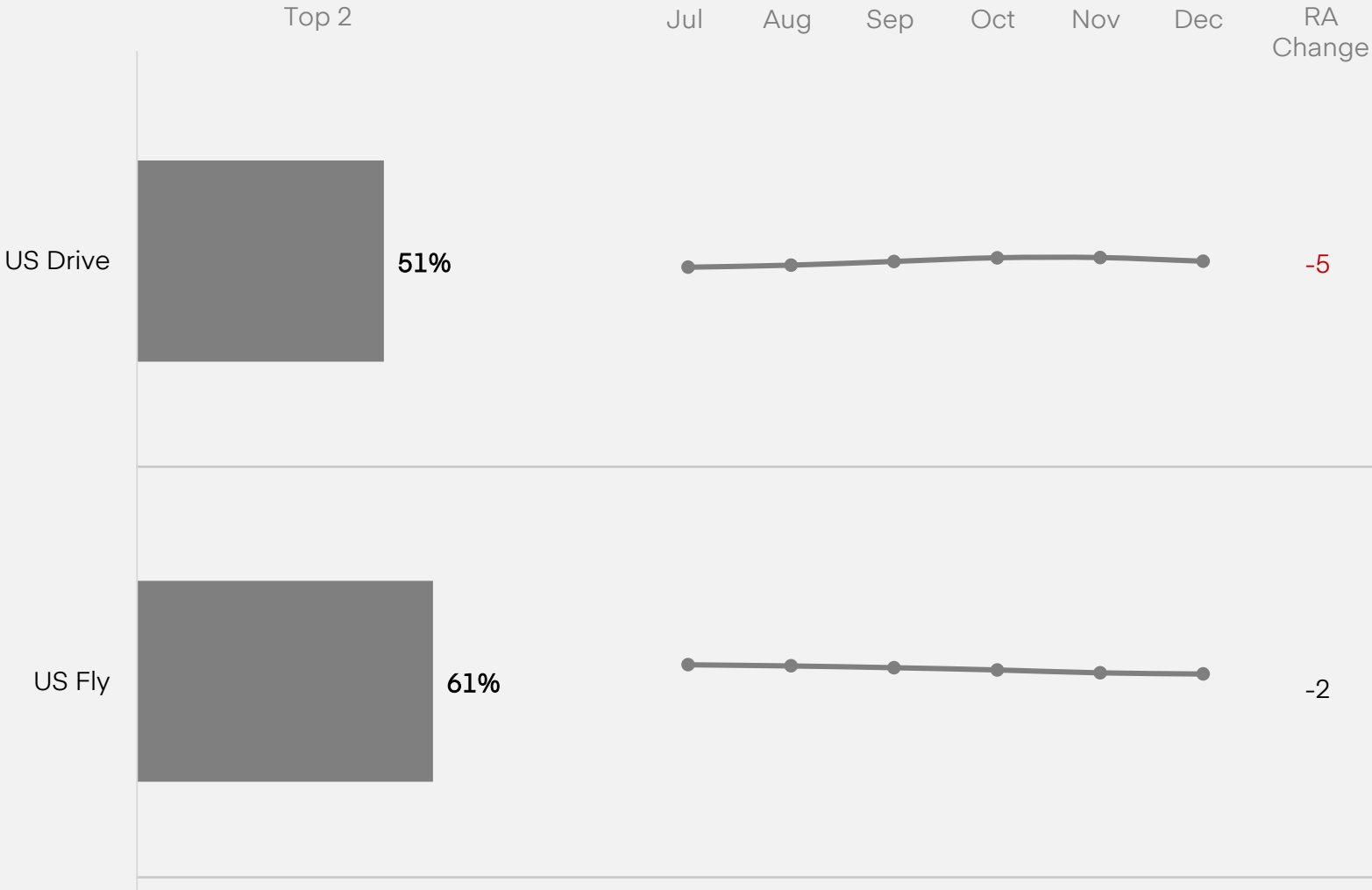|	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	69%							+1
US Drive	72%							-1
US Fly	83%							-
Western Canada	63%							-1
Manitoba	71%							+4
Quebec	51%							-2
Atlantic Canada	66%							+2

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. (n=5,941)

INFLUENCE OF EXCHANGE RATE ON TRAVEL TO ONTARIO

The exchange rate continues to motivate more U.S. Fly travellers than Drive travellers, though its influence has declined across both markets.

Compared to the previous month, U.S. Drive shows a significant decrease, while U.S. Fly has experienced a steady decline since July 2025.
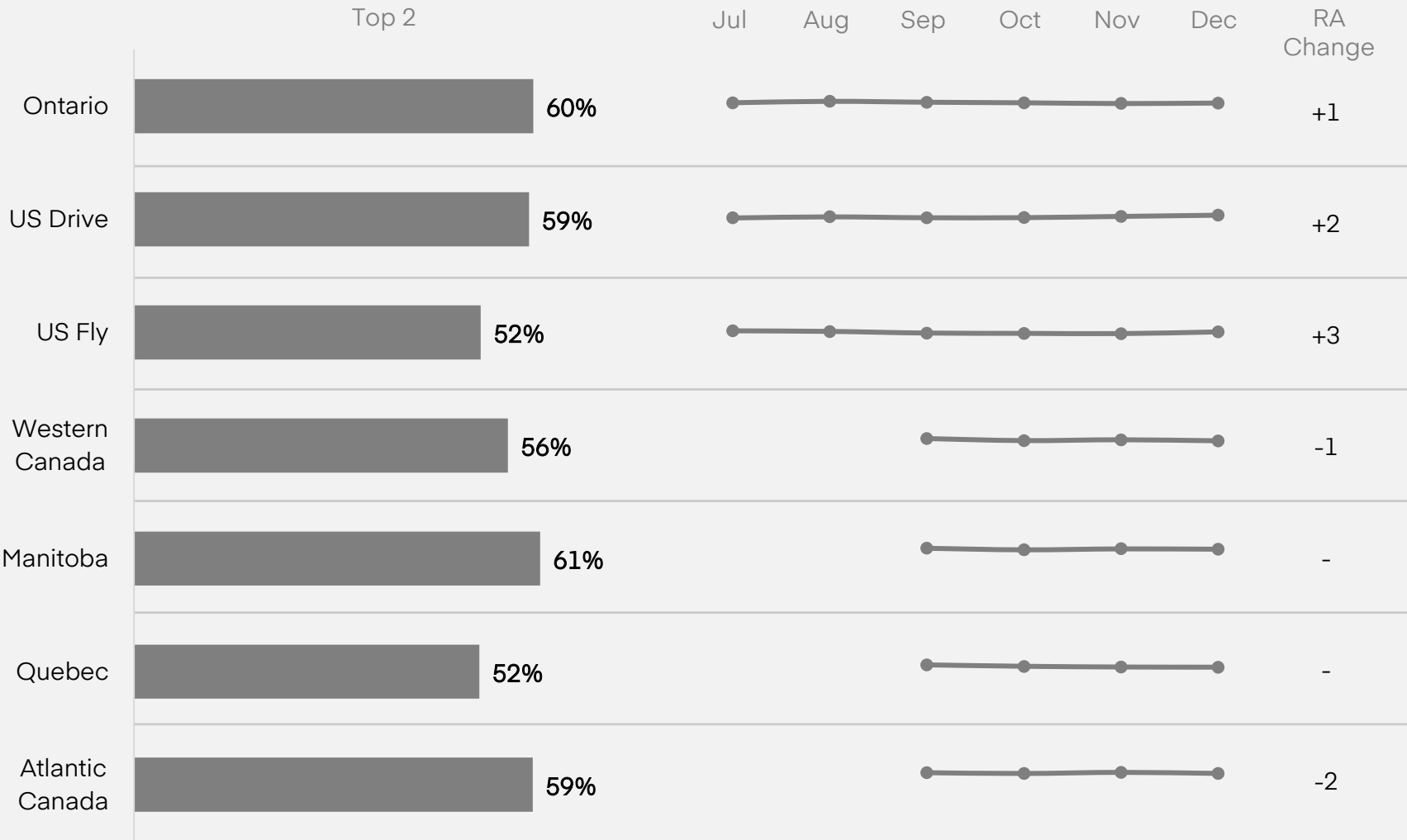
This downward trend suggests the exchange rate is becoming less influential in travellers' decisions to visit Ontario over time.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
US Drive	51%							-5
US Fly	61%							-2

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.] (Excludes "don't know") (5-point scale)
All respondents from U.S. Drive and U.S. Fly. (n=1,454)

FINANCIAL PRESSURES IMPACTING FUTURE TRAVEL PLANS

DESTINATION ONTARIO

Financial pressures continue to shape travel plans, with the greatest impact seen among travellers from Manitoba and Ontario, while other regions closely follow with similar sensitivity to financial constraints.

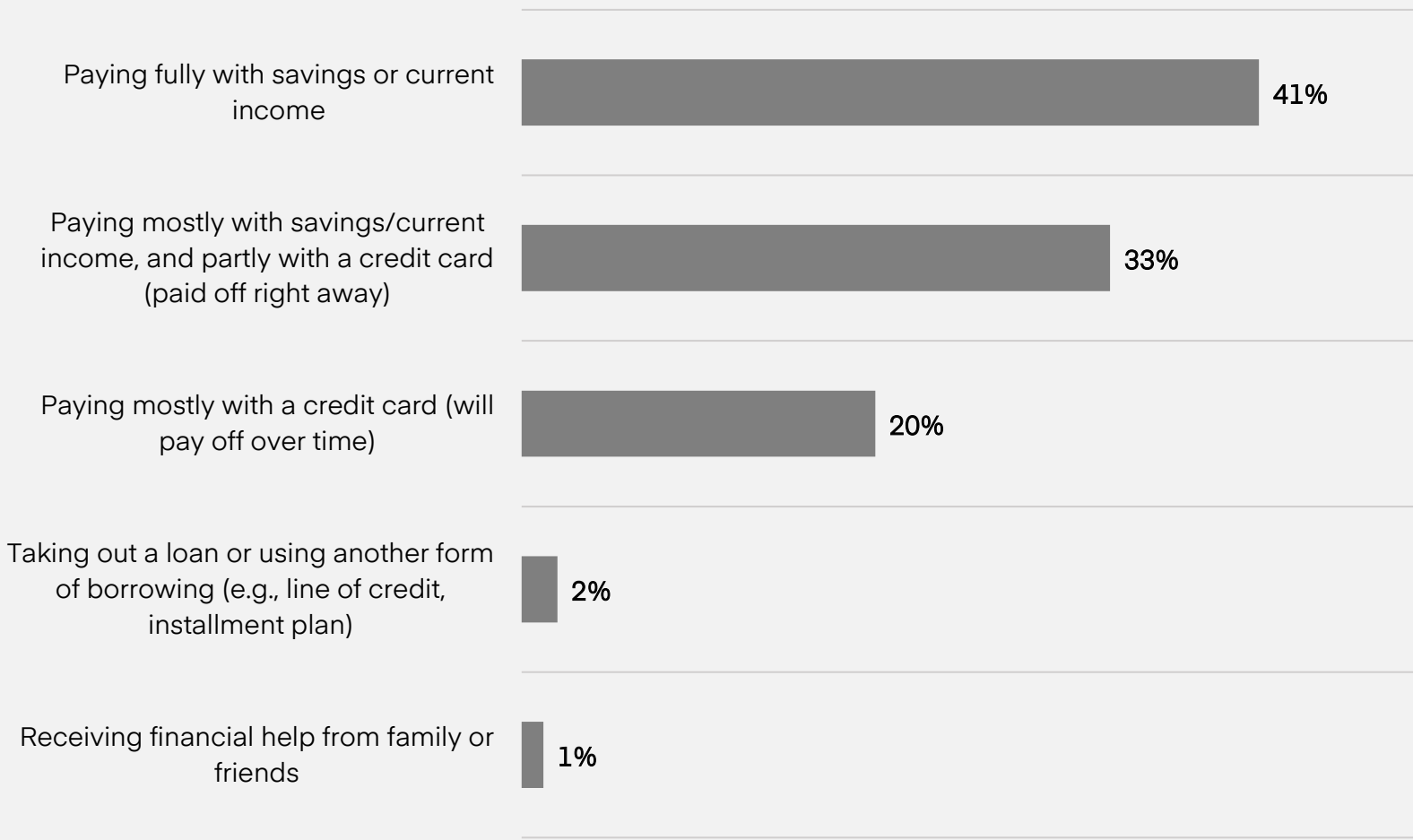|	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	60%							+1
US Drive	59%							+2
US Fly	52%							+3
Western Canada	56%							-1
Manitoba	61%							-
Quebec	52%							-
Atlantic Canada	59%							-2

TRAVEL PLAN PAYMENT

Two in five travellers are fully funding their pleasure trips through savings or current income, followed by those relying mostly on savings and partly on credit cards.

Since September, financial pressures have increasingly shaped U.S. Drive travellers' plans, reducing the influence of the exchange rate on their decision to visit Ontario. They are also more likely to rely on savings or current income to fund their trips, which may help explain why travel feels like a significant financial stretch.

*Market analysis is available in the detailed data export on the DO Insights Portal

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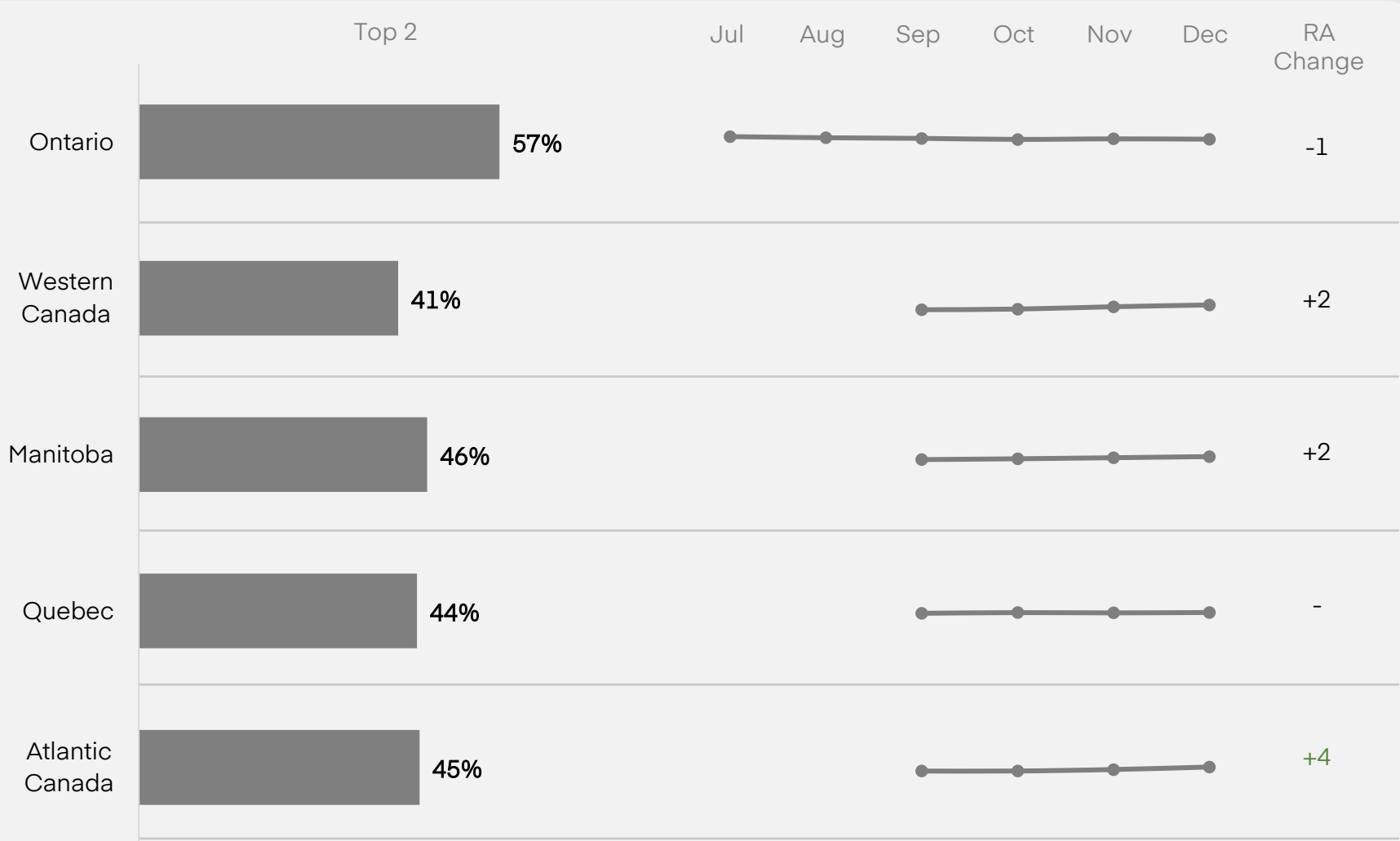| Payment method	Percentage
Paying fully with savings or current income	41%
Paying mostly with savings/current income, and partly with a credit card (paid off right away)	33%
Paying mostly with a credit card (will pay off over time)	20%
Taking out a loan or using another form of borrowing (e.g., line of credit, installment plan)	2%
Receiving financial help from family or friends	1%

T7. People use different ways to pay for pleasure trips. Which of the following best describes how you usually pay for pleasure trips? (Single-Select)
All respondents. (n=6,072)

IMPACT OF INTERNATIONAL EXCHANGE RATES ON DOMESTIC TRAVEL

Close to three in five Ontario travellers are more likely to travel within the province over the next 12 months due to unfavourable international exchange rates.

Other Canadian regions remain relatively stable in their likelihood to travel to Ontario for this reason, while Atlantic Canada records a significant increase in agreement.

During the summer, Atlantic Canada travellers are likely to visit Ontario, particularly Toronto, where activities are concentrated on shopping and family attractions.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	57%							-1
Western Canada	41%							+2
Manitoba	46%							+2
Quebec	44%							-
Atlantic Canada	45%							+4

T4. How much do you agree or disagree with the following statements? [I am more likely to travel in Ontario in the next 12 months because of the unfavourable international exchange rates.] (Excludes "don't know") (5-point scale) All respondents from Canada. (n=4,410)
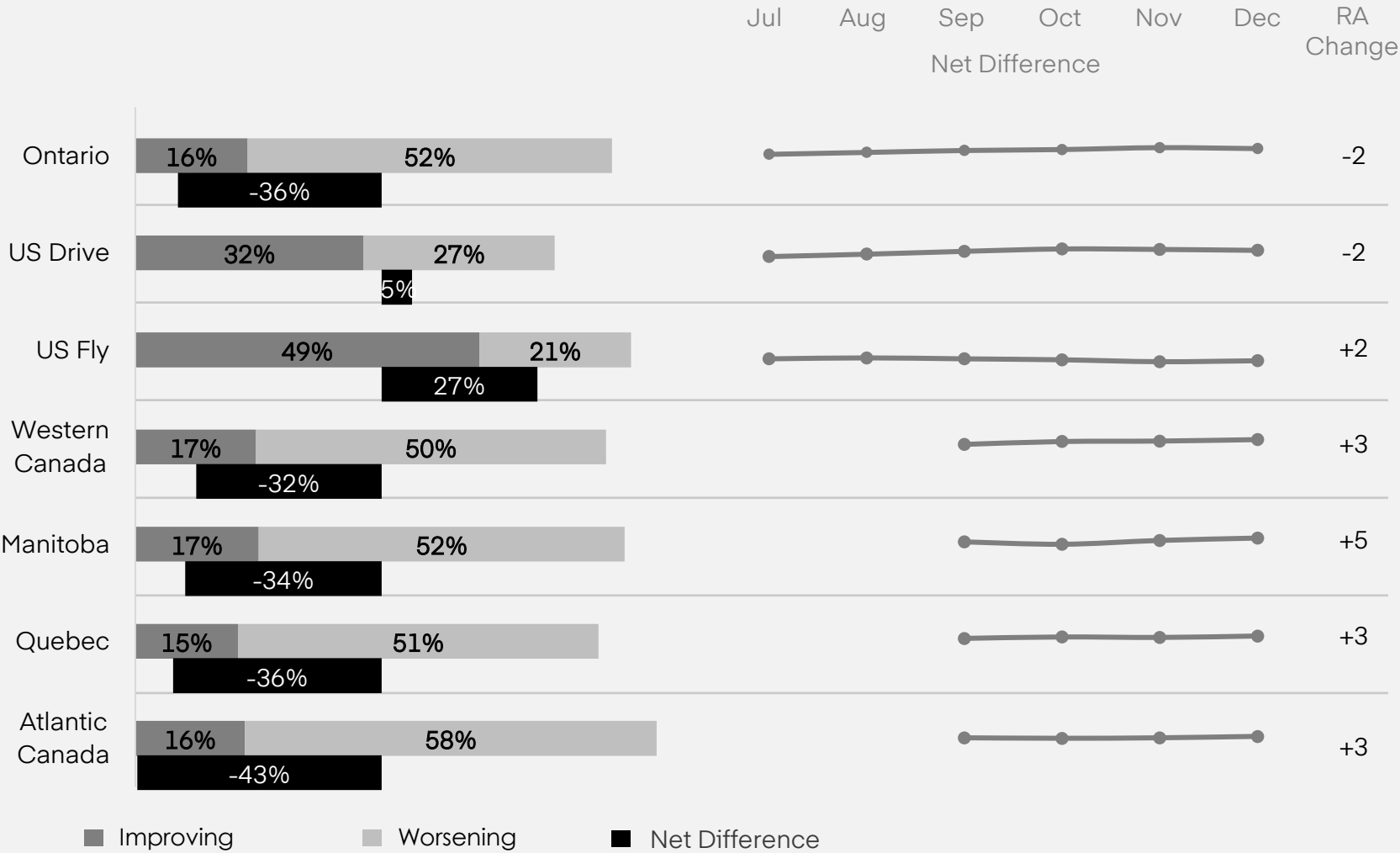
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RELATIONSHIP EXPECTATION BETWEEN THE U.S. AND CANADA

Perceptions of the U.S. and Canada relationship vary across markets. Canadian travellers are more likely to believe it will worsen, U.S. Fly travellers expect it to improve, and U.S. Drive travellers remain neutral.

Most travellers continue to hold steady in their expectations, while Manitoba travellers show a slight increase from the previous month, indicating a small shift in sentiment.

This coincides with a significant decrease among Manitoba travellers in the belief that the relationship is worsening.

*Trend lines represents the difference between improving and worsening.

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Chart data:

Market	Improving	Worsening	Net Difference	RA Change
Ontario	16%	52%	-36%	-2
US Drive	32%	27%	5%	-2
US Fly	49%	21%	27%	+2
Western Canada	17%	50%	-32%	+3
Manitoba	17%	52%	-34%	+5
Quebec	15%	51%	-36%	+3
Atlantic Canada	16%	58%	-43%	+3

Net Difference months: Jul, Aug, Sep, Oct, Nov, Dec
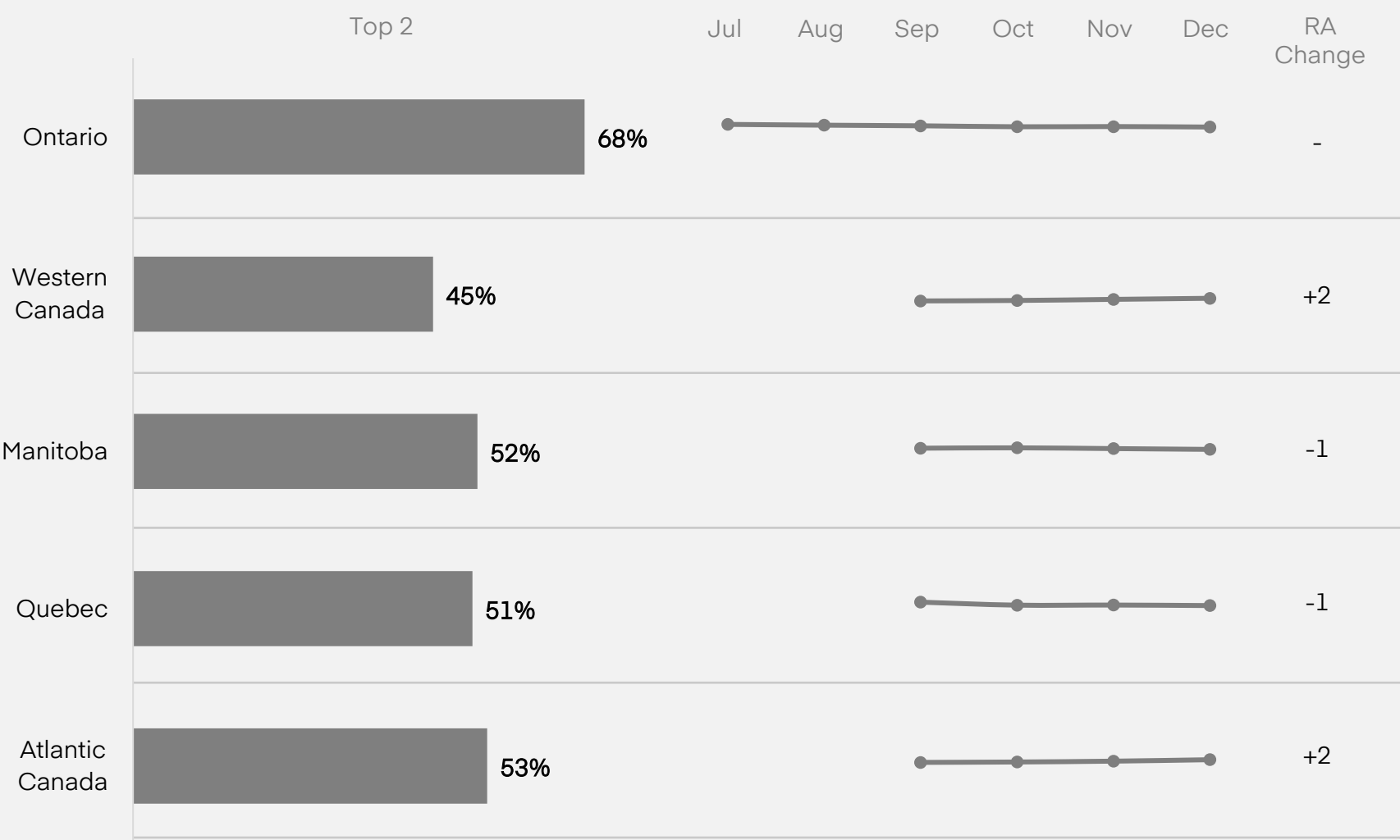
Legend: Improving, Worsening, Net Difference

P2. Over the next 12 months, how do you think the relationship between the U.S. and Canada will change? (Excludes "don't know") (5-point scale)
All respondents. (n=5,610)

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ONTARIO TRAVEL LIKELIHOOD: IMPACT OF THE U.S. POLITICAL CLIMATE

Ontario travellers remain the most likely to choose travel within the province due to the current U.S. political climate, followed by those in Atlantic Canada.

All Canadian regions are holding steady compared to the previous month, while Western and Atlantic Canada continue to show a slight increase in interest in travelling to Ontario for this reason since September.

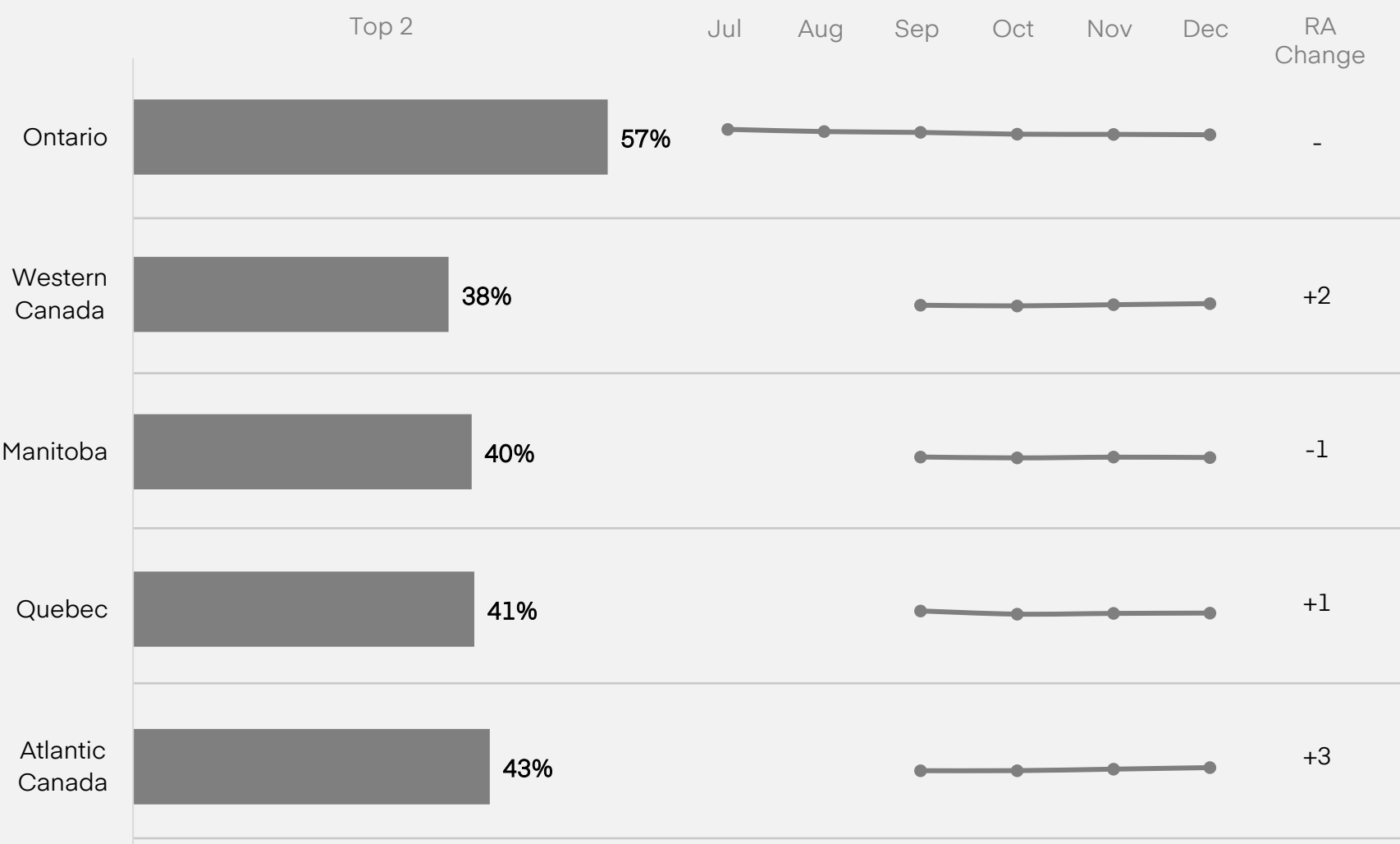|	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	68%							-
Western Canada	45%							+2
Manitoba	52%							-1
Quebec	51%							-1
Atlantic Canada	53%							+2

P3. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
[I am more likely to travel within Ontario in the next 12 months because of the current political climate in the United States.]
All respondents from Canada. (n=4,398)

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ONTARIO TRAVEL LIKELIHOOD: IMPACT OF GLOBAL INSTABILITY

Close to three in five Ontario travellers are likely to travel within Ontario due to global instability and conflicts, while around two in five travellers from other Canadian markets plan to travel to Ontario for the same reason.

Concerns about global instability and conflict remain stable but are becoming a stronger factor for domestic travel among travellers from Western and Atlantic Canada.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	57%							-
Western Canada	38%							+2
Manitoba	40%							-1
Quebec	41%							+1
Atlantic Canada	43%							+3

P3. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
[I am more likely to travel within Ontario in the next 12 months due to concerns about global instability and conflicts]
All respondents from Canada. (n=4,398)

ENVIRONMENTAL CONSIDERATIONS IN TRAVEL

Weather conditions continue to have limited overall impact on travel to Ontario, though wildfires and lack of snow are becoming more influential for select regions compared to the previous month. In addition, interest in sustainable travel remains higher among U.S. travellers, especially U.S. Fly, while Canadians are showing growing willingness to prioritize and pay more for sustainable options.

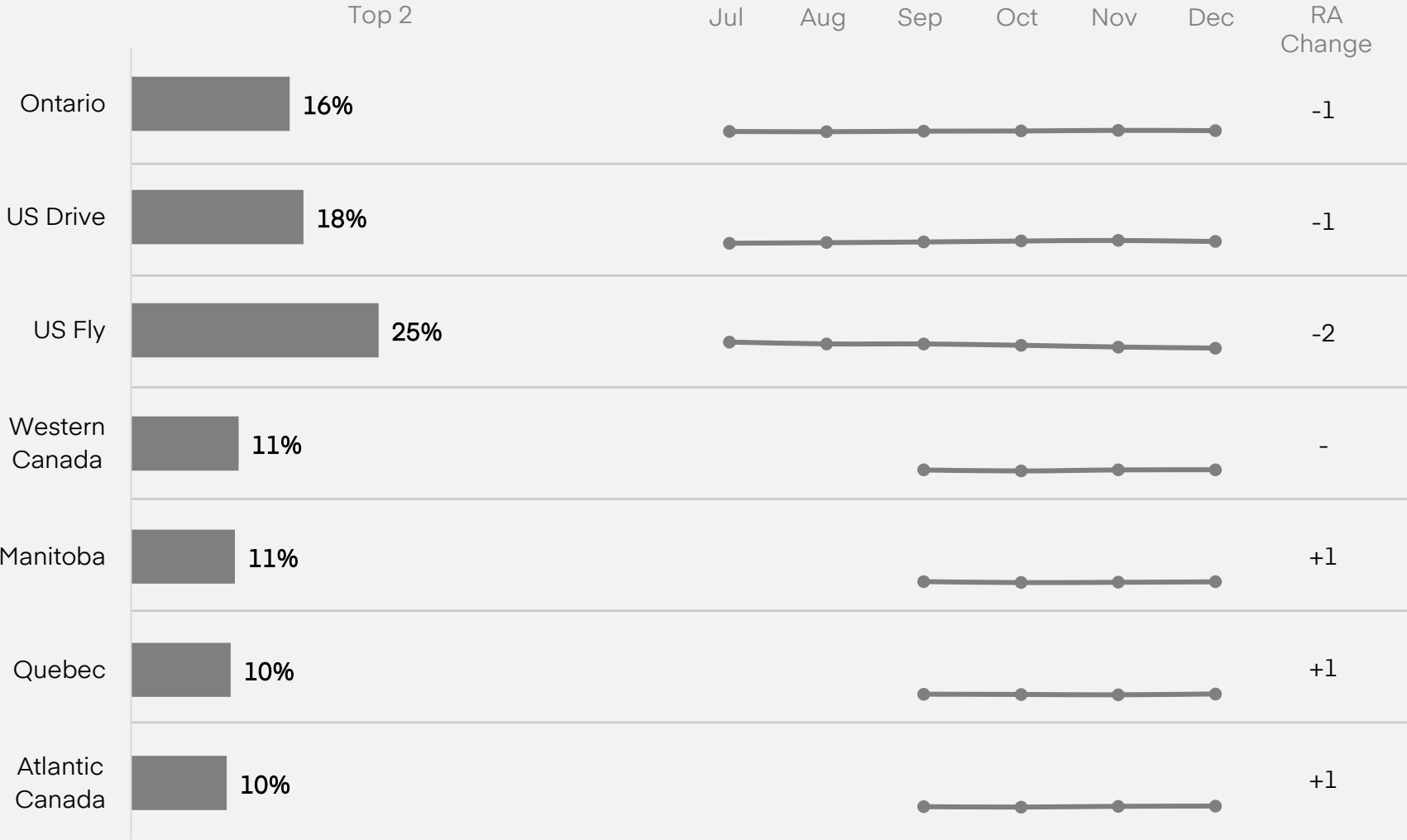**Tags -** Explore more on DOinsights.crg.ca

Weather Conditions   Sustainability   Impact on Travel Plans

♀ **Grand Bend**

LACK OF SNOW IMPACT ON ONTARIO TRAVEL

Travellers' overall sentiment toward the lack of snow impacting their plans to travel to Ontario remains steady.

While the U.S. Fly market is still the most likely to agree, their agreement has been steadily declining since September.

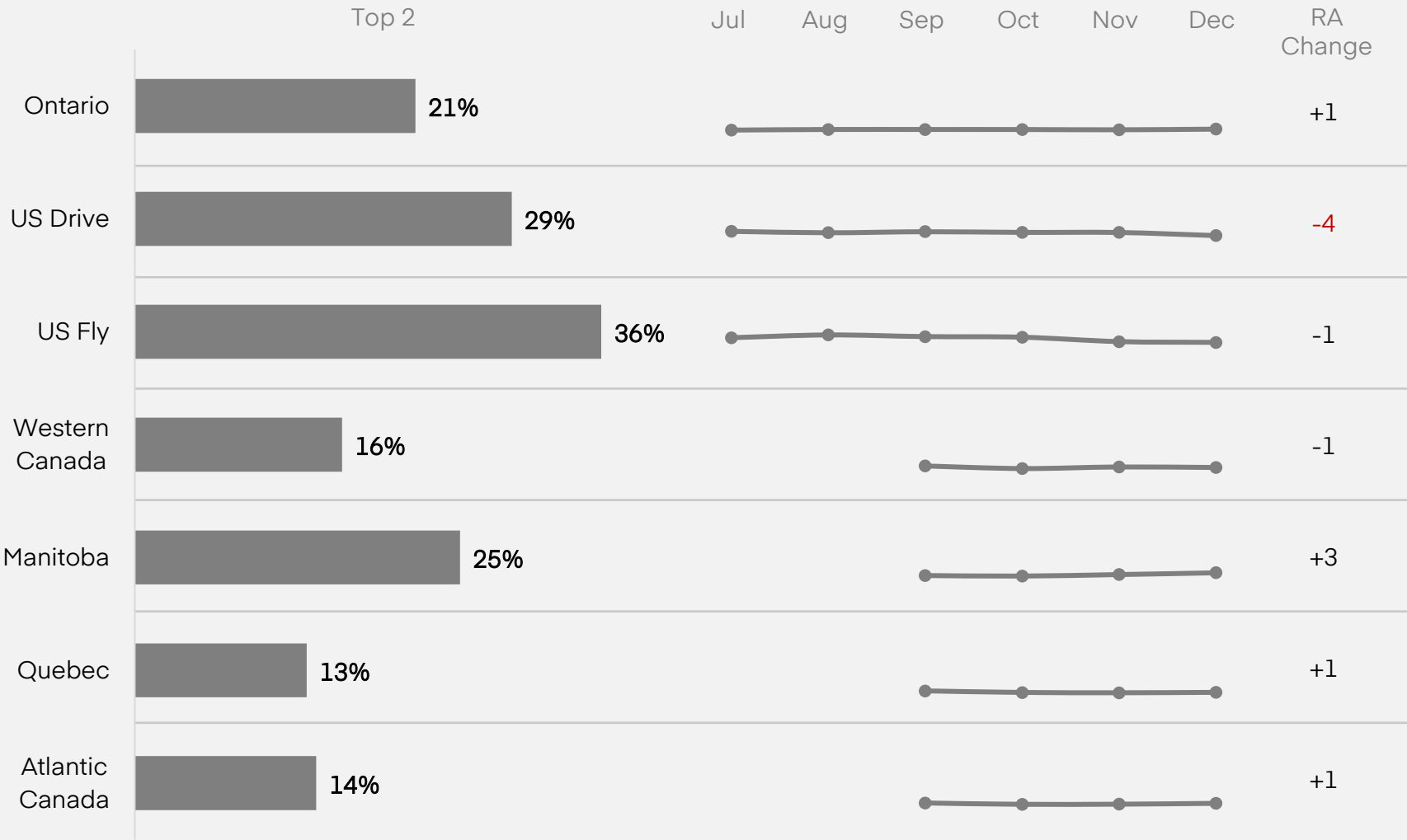|	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	16%							-1
US Drive	18%							-1
US Fly	25%							-2
Western Canada	11%							-
Manitoba	11%							+1
Quebec	10%							+1
Atlantic Canada	10%							+1

ST1. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
[The lack of snow has impacted my travel plans in Ontario, Canada]
All respondents. (n=5,897)

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U.S. travellers are more likely to report that wildfires have impacted their plans to travel to Ontario compared to other regions, followed by Manitoba travellers.

Since October 2025, agreement that wildfires impact travel plans to Ontario has been steadily increasing among travellers from Manitoba. In contrast, agreement among U.S. Drive travellers has been on a steady decline since July 2025, including a significant decrease from the previous month.

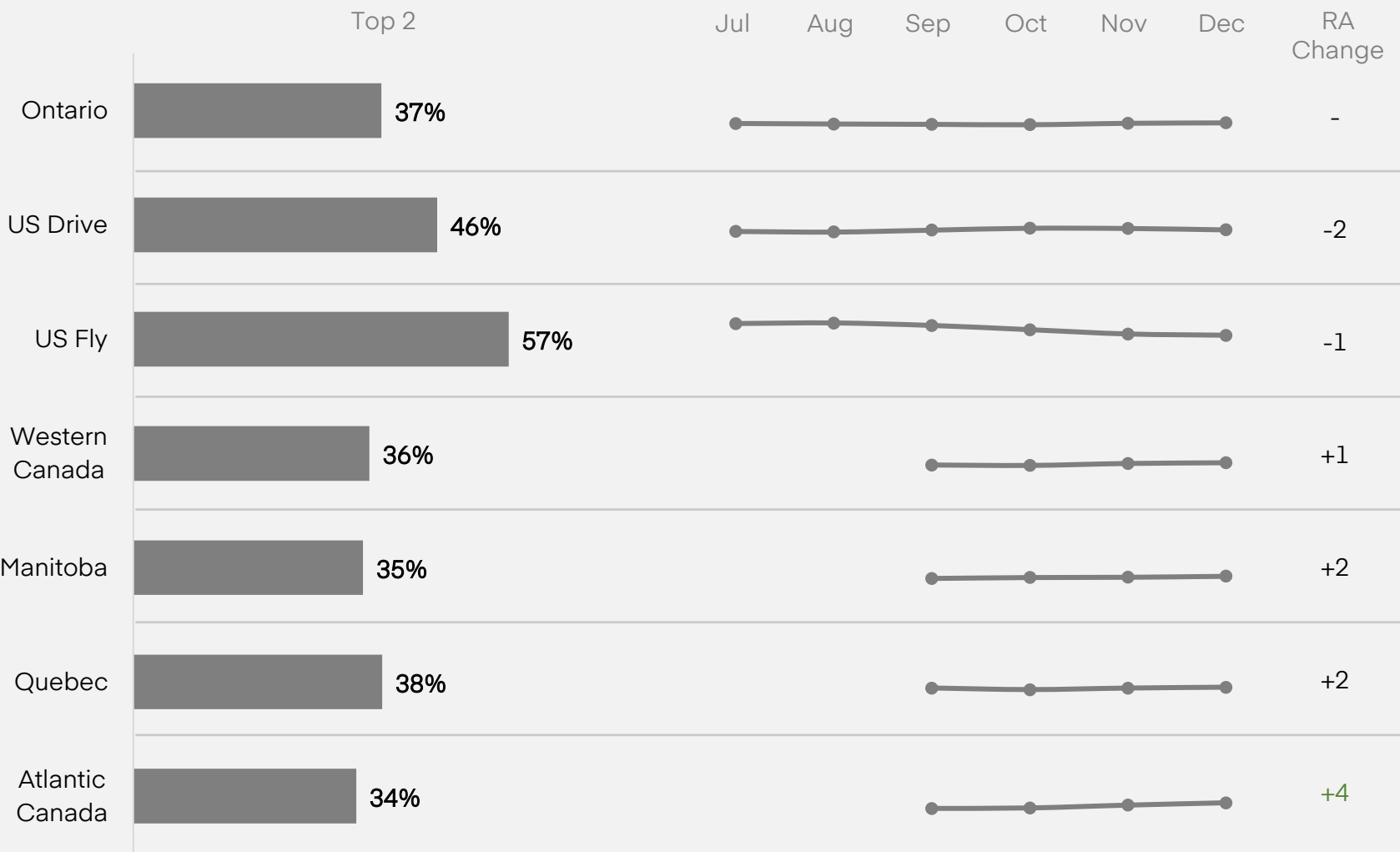|	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	21%							+1
US Drive	29%							-4
US Fly	36%							-1
Western Canada	16%							-1
Manitoba	25%							+3
Quebec	13%							+1
Atlantic Canada	14%							+1

ST1. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale) [Canadian wildfires have impacted my travel plans in Ontario, Canada] All respondents. (n=5,897)

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PRIORITIZING SUSTAINABLE TOURISM

Interest in sustainable tourism has remained stable compared to the previous month for many of the regions.

U.S. Fly travellers are more motivated by sustainability than other markets, with close to three-fifths expressing agreement.

Atlantic Canada travellers report a significant increase and a steady upward trend since September.

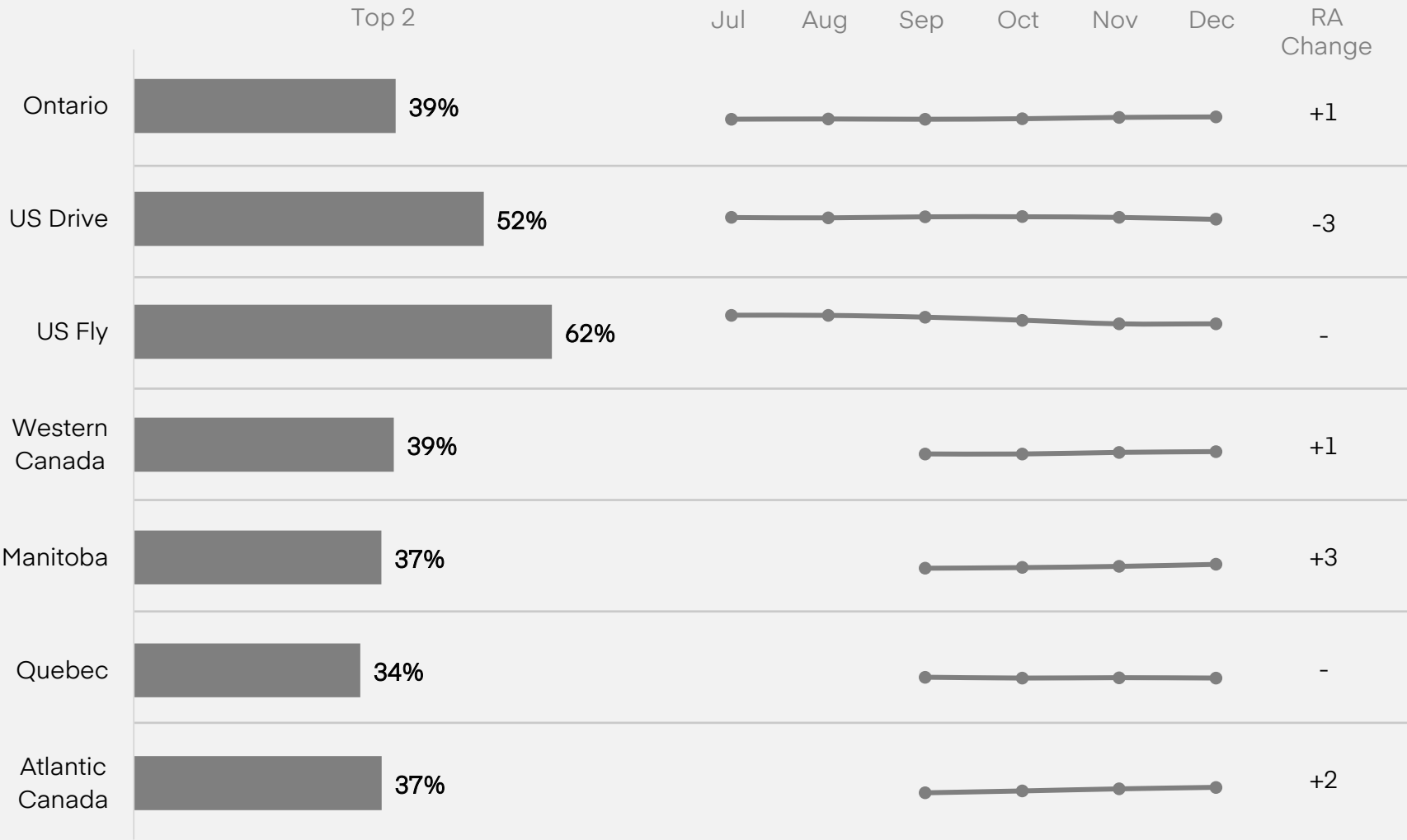|	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	37%							-
US Drive	46%							-2
US Fly	57%							-1
Western Canada	36%							+1
Manitoba	35%							+2
Quebec	38%							+2
Atlantic Canada	34%							+4

ST2. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
[I choose travel destinations that prioritize sustainable tourism]
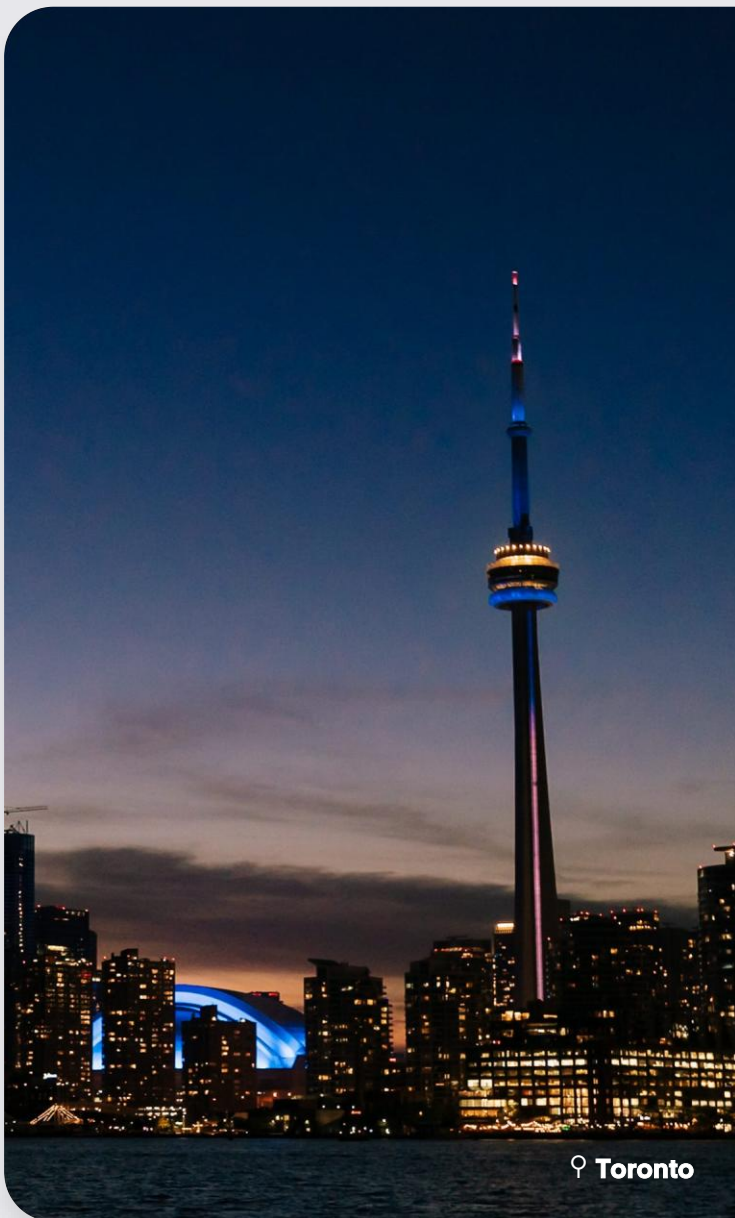All respondents. (n=5,806)

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PAYING EXTRA FOR SUSTAINABLE TRAVEL

U.S. travellers are more likely than Canadian travellers to agree that they are willing to pay more for a sustainable travel option if the experience were equivalent.

Among Canadian travellers, except those in Quebec, there is an upward trend in willingness to pay more for sustainable travel options.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	RA Change
Ontario	39%							+1
US Drive	52%							-3
US Fly	62%							-
Western Canada	39%							+1
Manitoba	37%							+3
Quebec	34%							-
Atlantic Canada	37%							+2

ST2. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
[I am willing to pay more for a sustainable travel option, if the experience is equivalent]
All respondents. (n=5,806)

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FIFA WORLD CUP 2026

Travellers are broadly aware that Toronto is a host city for the FIFA World Cup 2026. GTA residents and U.S. Fly travellers show strong interest in experiencing FIFA in the city, while other regions are more inclined to avoid Toronto during the event.
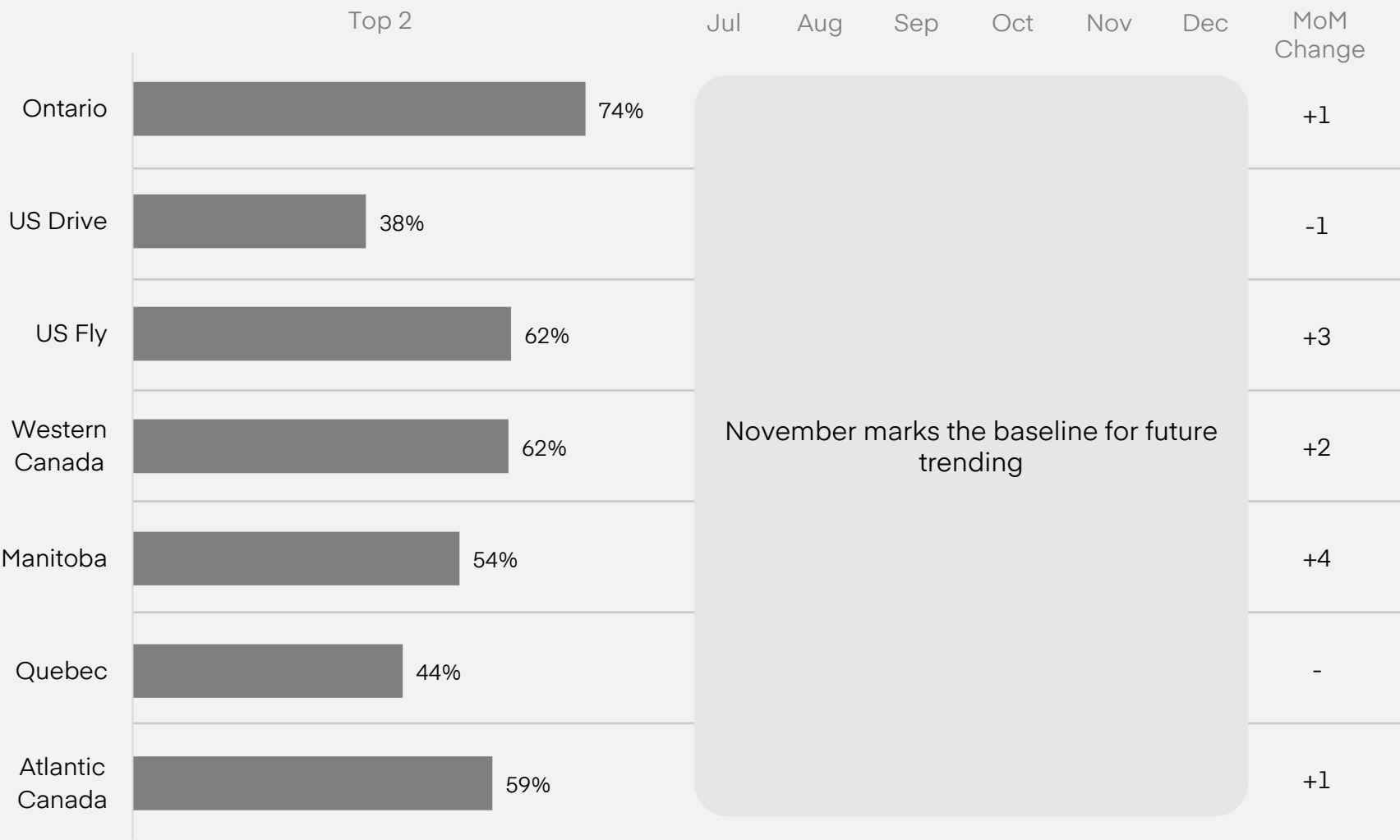
Tags - Explore more on DOinsights.crg.ca

FIFA 2026

Toronto

AWARENESS OF TORONTO AS HOST CITY

Toronto's role as a FIFA 2026 host city is well recognized among Ontarians as three in four are aware of it.

Awareness remains generally positive across markets, though it tapers among U.S. Drive and Quebec travellers.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	MoM Change
Ontario	74%							+1
US Drive	38%							-1
US Fly	62%							+3
Western Canada	62%							+2
Manitoba	54%							+4
Quebec	44%							-
Atlantic Canada	59%							+1

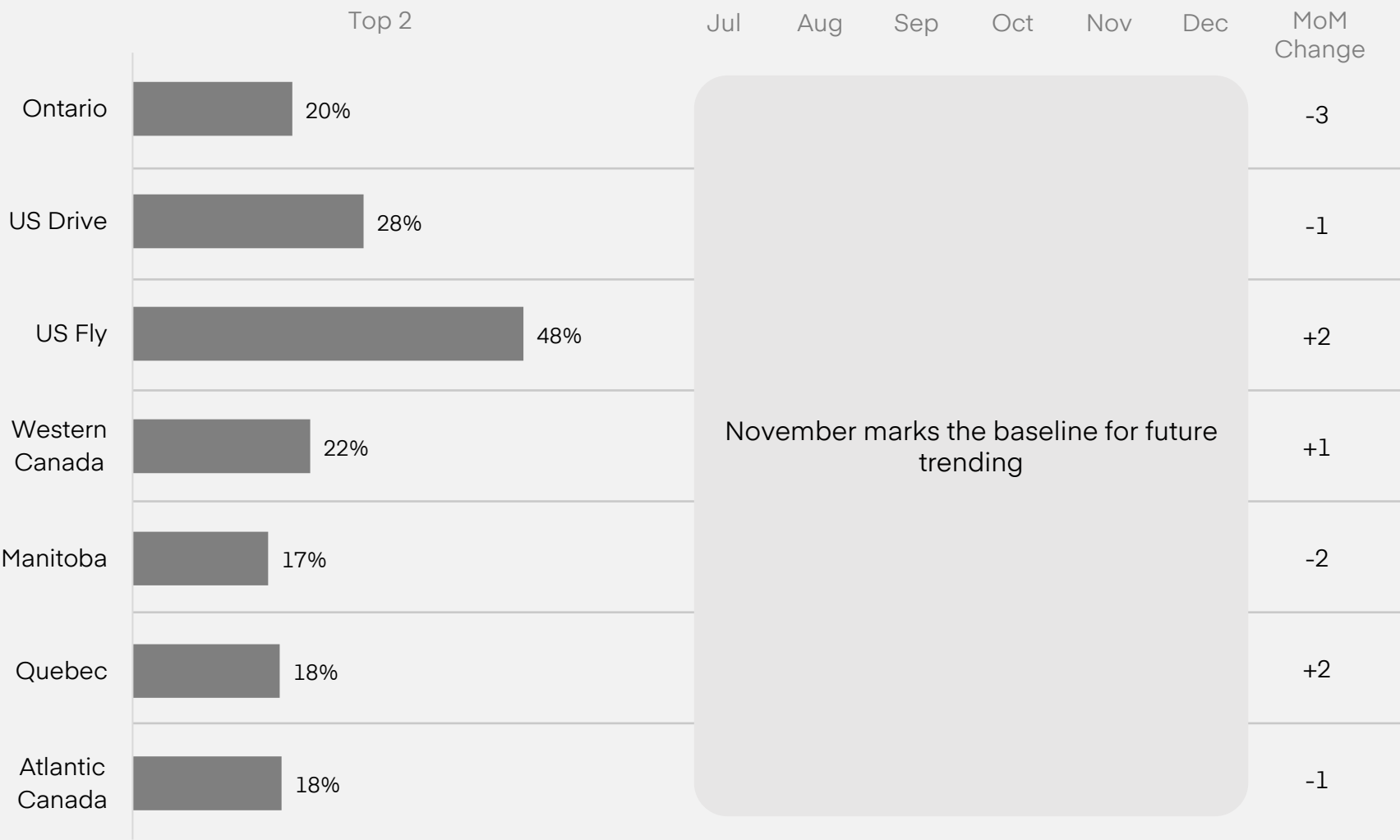November marks the baseline for future trending

FI1. Before today, how aware are you that Toronto is one of the official host cities for the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
All respondents. (n= 3,924)

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VISITING TORONTO DUE TO FIFA WORLD CUP 2026

U.S. Fly travellers are noticeably more likely to visit Toronto because it is hosting FIFA 2026, as near half reported.

For all other markets, FIFA 2026 alone is not a strong motivator, fewer than one in three travellers say it increases their likelihood of visiting.

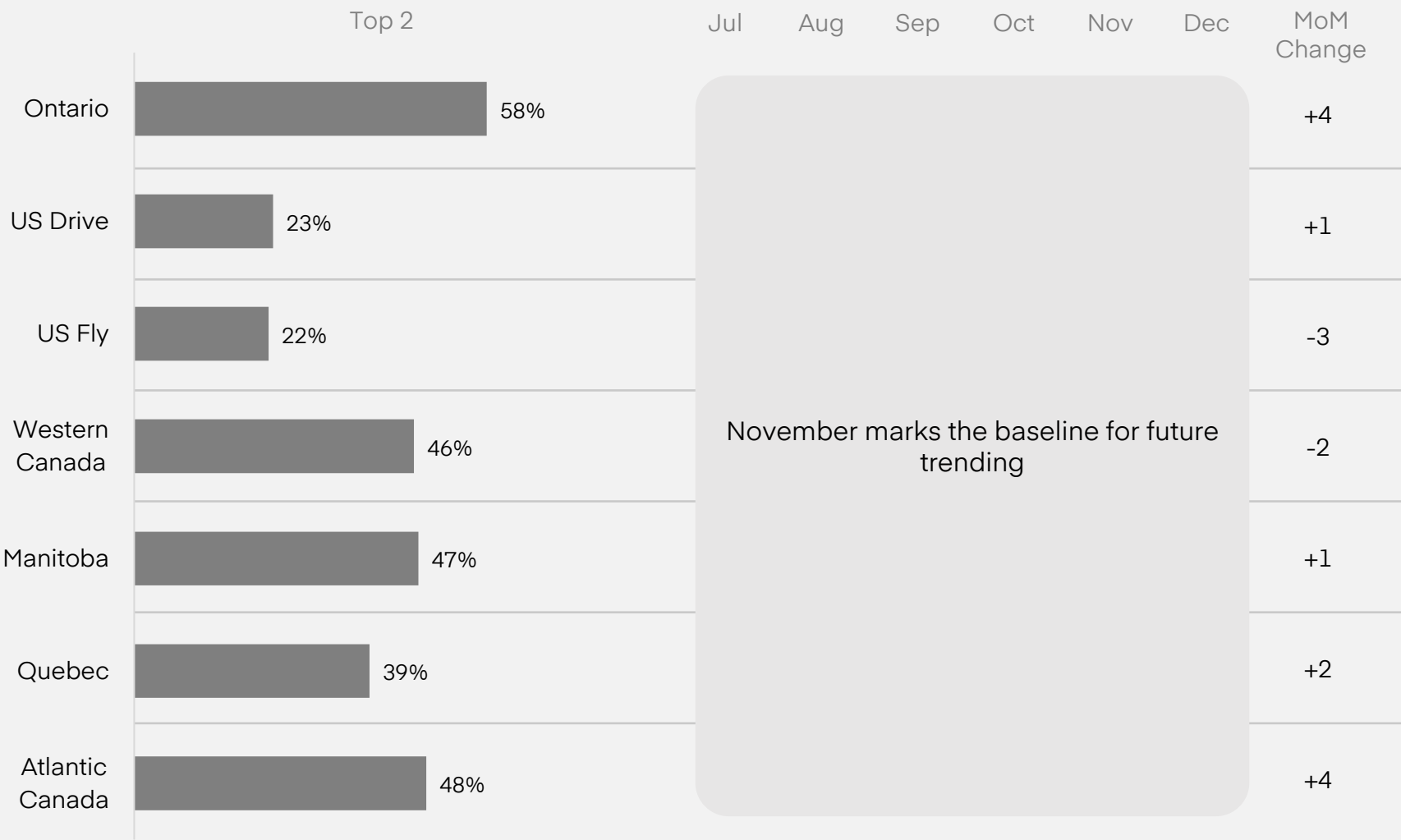|	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	MoM Change
Ontario	20%							-3
US Drive	28%							-1
US Fly	48%							+2
Western Canada	22%							+1
Manitoba	17%							-2
Quebec	18%							+2
Atlantic Canada	18%							-1

November marks the baseline for future trending

FI2. How likely are you to visit Toronto because it's hosting the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
Respondent who don't live in the GTA (n=3,545)

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AVOIDING TORONTO DUE TO FIFA WORLD CUP 2026

The Canadian markets are more likely to avoid Toronto because it is one of the host cities for FIFA 2026.

In contrast, close to one in five U.S. travellers stated they would avoid Toronto.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	MoM Change
Ontario	58%							+4
US Drive	23%							+1
US Fly	22%							-3
Western Canada	46%							-2
Manitoba	47%							+1
Quebec	39%							+2
Atlantic Canada	48%							+4

November marks the baseline for future trending

FI3. How likely are you to avoid Toronto because it's hosting the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
Respondent who don't live in the GTA (n=3,487)

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VISITING FIFA HOST AREAS WITHIN TORONTO

Nearly half of GTA residents report they would take part in Toronto's FIFA 2026 experience, whether by attending matches or related attractions.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	MoM Change
Ontario	45%							–

November marks the baseline for future trending

FI2B. How likely are you to visit Toronto's FIFA host areas, fan zones, or attractions or attend any World Cup matches during the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
Respondent who live in the GTA (n=416)

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AVOIDING FIFA HOST AREAS WITHIN TORONTO

Close to two in five GTA residents say they are more likely to avoid Toronto's FIFA 2026 experiences, likely due to concerns about large crowds and increased visitor traffic.

Overall, residents show mixed sentiment toward being in the city during the World Cup, with interest slightly outweighing avoidance.

	Top 2	Jul	Aug	Sep	Oct	Nov	Dec	MoM Change
Ontario	39%					November marks the baseline for future trending		+1

FI3B. How likely are you to avoid Toronto's FIFA host areas, fan zones, or attractions or attend any World Cup matches during the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
Respondent who live in the GTA (n=413)