CONTEXT
RESEARCH
GROUP

**DESTINATION
ONTARIO**

In partnership with Destination Ontario

DOinsights.crg.ca

ONTARIO TRAVEL & TOURISM MONTHLY
NOVEMBER 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.

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=2,010)
• Ontario (n=480)
• U.S. Drive (n=254)
• U.S. Fly (n=223)
• Western Canada (n=301)
• Manitoba (n=196)
• Quebec (n=281)
• Atlantic Canada (n=275)

Fieldwork Date:
• November 21st – 30th, 2025

Median Length of Interview:
• 15.9 minutes

Margin of Error:
• Ontario: ± 4.5%
• U.S. Drive: ± 6.2%
• U.S. Fly: ± 6.6%
• Western Canada: ± 5.7%
• Manitoba: ± 7%
• Quebec : ± 5.9%
• Atlantic Canada: ± 6%

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.

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.

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

Rolling Averages
Data presented in the KPI slides 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.

EXECUTIVE SUMMARY

- Ontario's position as a leisure destination remains resilient, with Western and Atlantic Canada providing incremental momentum even as the U.S. Drive market shows some softening in intent and trip volumes.

- Travellers are shifting from spontaneous, near-term visits toward more deliberate mid-term planning, suggesting that Ontario is increasingly being included in planned trips rather than decided on at the last minute.

- Brand health is strengthening summer continues to anchor Ontario's appeal, and rising likelihood to recommend signals growing advocacy that can be leveraged in upcoming seasons and campaigns.

- Information-seeking behaviour is stable overall but tilting toward video-led inspiration, with YouTube emerging as a key planning channel; at the same time, Atlantic Canada is becoming more engaged in travel research while U.S. Drive travellers pull back slightly.

- The exchange rate is less influential for U.S. visitors' travel decisions, financial pressures are more salient for some markets, and many Canadians are prioritizing Ontario over international travel in response to currency volatility and global uncertainty.

- Environmental factors, particularly wildfires, are beginning to influence perceptions and plans in Western Canada and Manitoba.

- Major events like FIFA are shaping demand patterns: awareness of Toronto's host-city role is highest in Ontario, while the strongest travel intent comes from U.S. Fly travellers, indicating a high-value segment that can help offset softer drive markets.

DESTINATION
ONTARIO

ONTARIO	U.S. DRIVE	U.S. FLY
Travel Intent In The Next 12 Months		
80%	63%	68%
+1%	+2%	-4%
Travel Info Search		
56%	62%	75%
-	-1%	-4%
Travel Worthwhile Investment		
68%	73%	83%
+1%	+1%	-2%

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

KPI – 3 MONTH ROLLING AVERAGE

WESTERN CA	MANITOBA	QUEBEC	ATLANTIC CA
Travel Intent In The Next 12 Months			
45%	54%	47%	57%
+4%	+1%	-2%	+2%
Travel Info Search			
61%	55%	56%	55%
+1%	-	-1%	+1%
Travel Worthwhile Investment			
64%	67%	53%	64%
-	-1%	-1%	-

TRAVEL DESTINATION PLANS

Interest in travelling to Ontario remains strongest among Ontario residents and visitors from the U.S. Fly market, supported by notable growth from Western Canada. 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, reflecting an ongoing preference to schedule Ontario trips midway through the year.

Tags - Explore more on DOinsights.crg.ca

Travel Intent   Number of Trips   Month of Travel

♀ Algonquin Park

LIKELIHOOD OF TRAVELLING IN ONTARIO

Interest in travelling to Ontario remains strongest among Ontario, U.S. Fly, and Atlantic Canada markets. Interest in visiting Ontario from Western Canada has increased significantly from the previous month.

	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	80%						+1
US Drive	58%						-8
US Fly	64%						-3
Western Canada	52%						+11
Manitoba	56%						+5
Quebec	43%						-11
Atlantic Canada	60%						+6
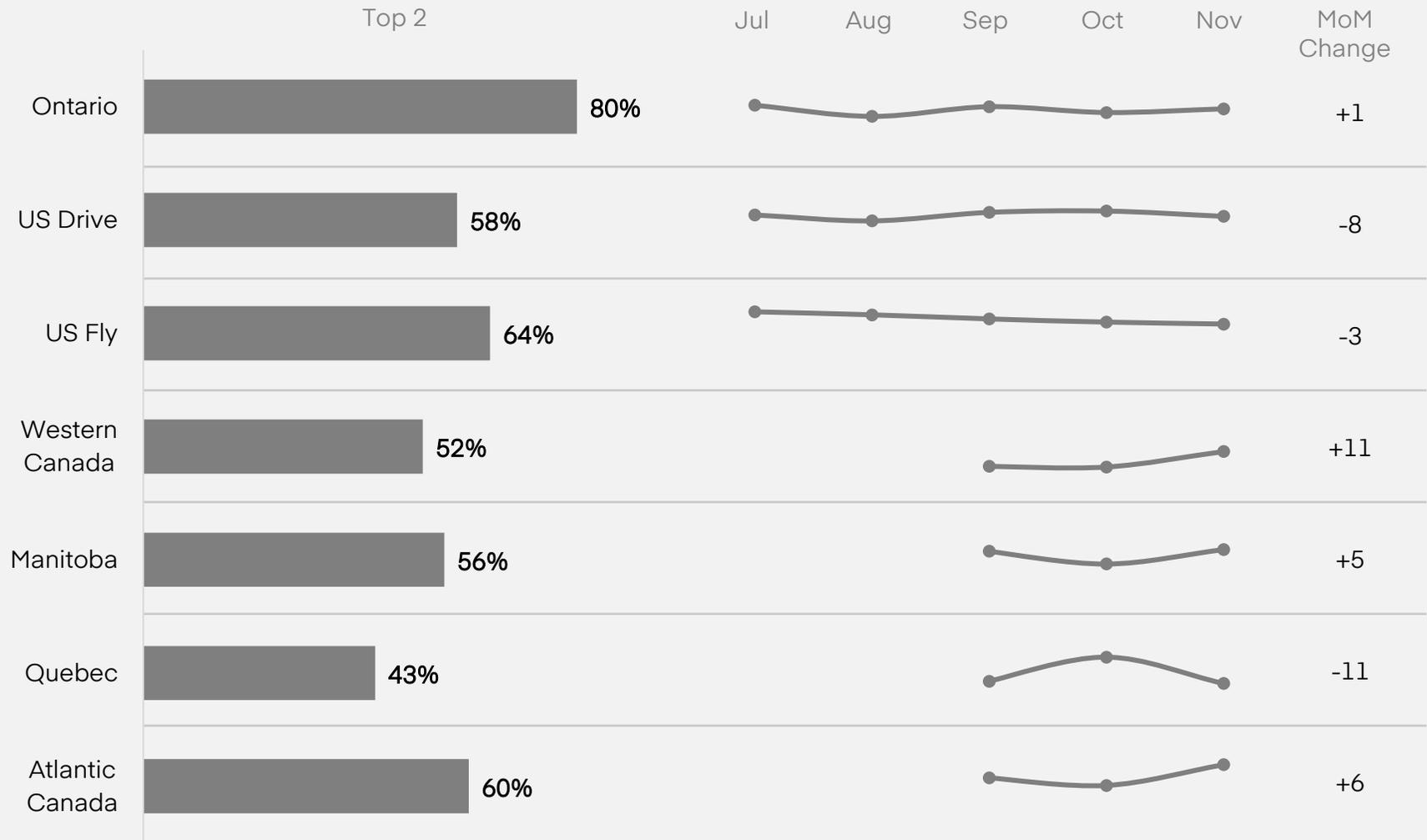
S5. In the next 12 months, how likely are you to take a pleasure trip of one or more nights in Ontario, Canada? (Excludes "don't know") (5-point scale)
All respondents (n= 1,987)

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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. The U.S. Drive market has seen a slight decrease in the number of trips taken to Ontario.
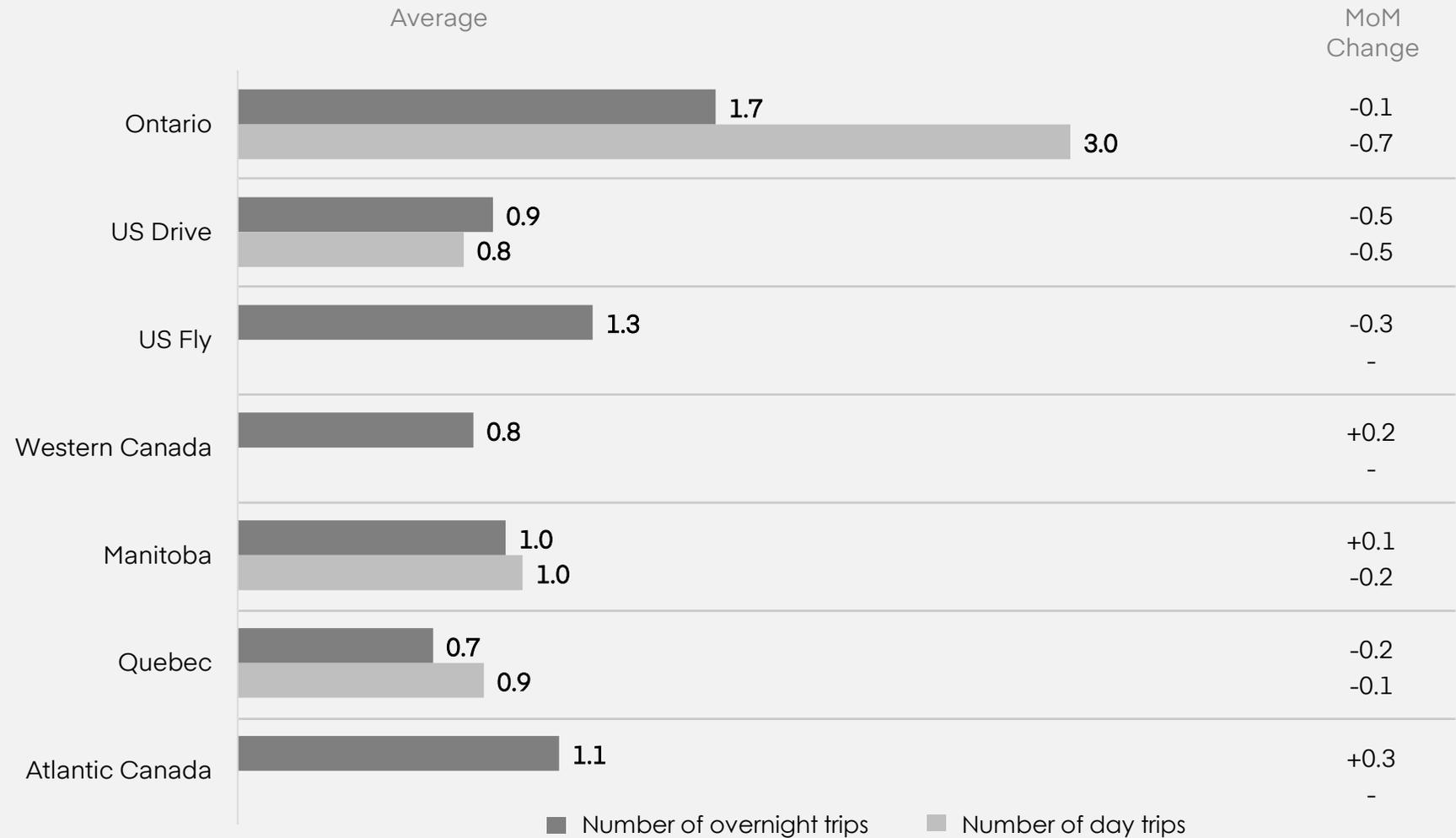
Average

	Number of overnight trips	Number of day trips	MoM Change
Ontario	1.7	3.0	-0.1 / -0.7
US Drive	0.9	0.8	-0.5 / -0.5
US Fly	1.3		-0.3 / -
Western Canada	0.8		+0.2 / -
Manitoba	1.0	1.0	+0.1 / -0.2
Quebec	0.7	0.9	-0.2 / -0.1
Atlantic Canada	1.1		+0.3 / -

■ Number of overnight trips ■ Number of day trips

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PLANNED MONTHS OF TRAVEL

Summer is the most popular travel period for Ontario, especially for July and August, as travel intent has been consistent with the previous month.

Month	%	MoM Change
January	11%	+1
February	9%	-2
March	14%	+1
April	14%	+1
May	19%	-1
June	25%	+3
July	29%	-1
August	25%	+3
September	12%	+2
October	8%	+3
November	4%	-10
December	13%	-6
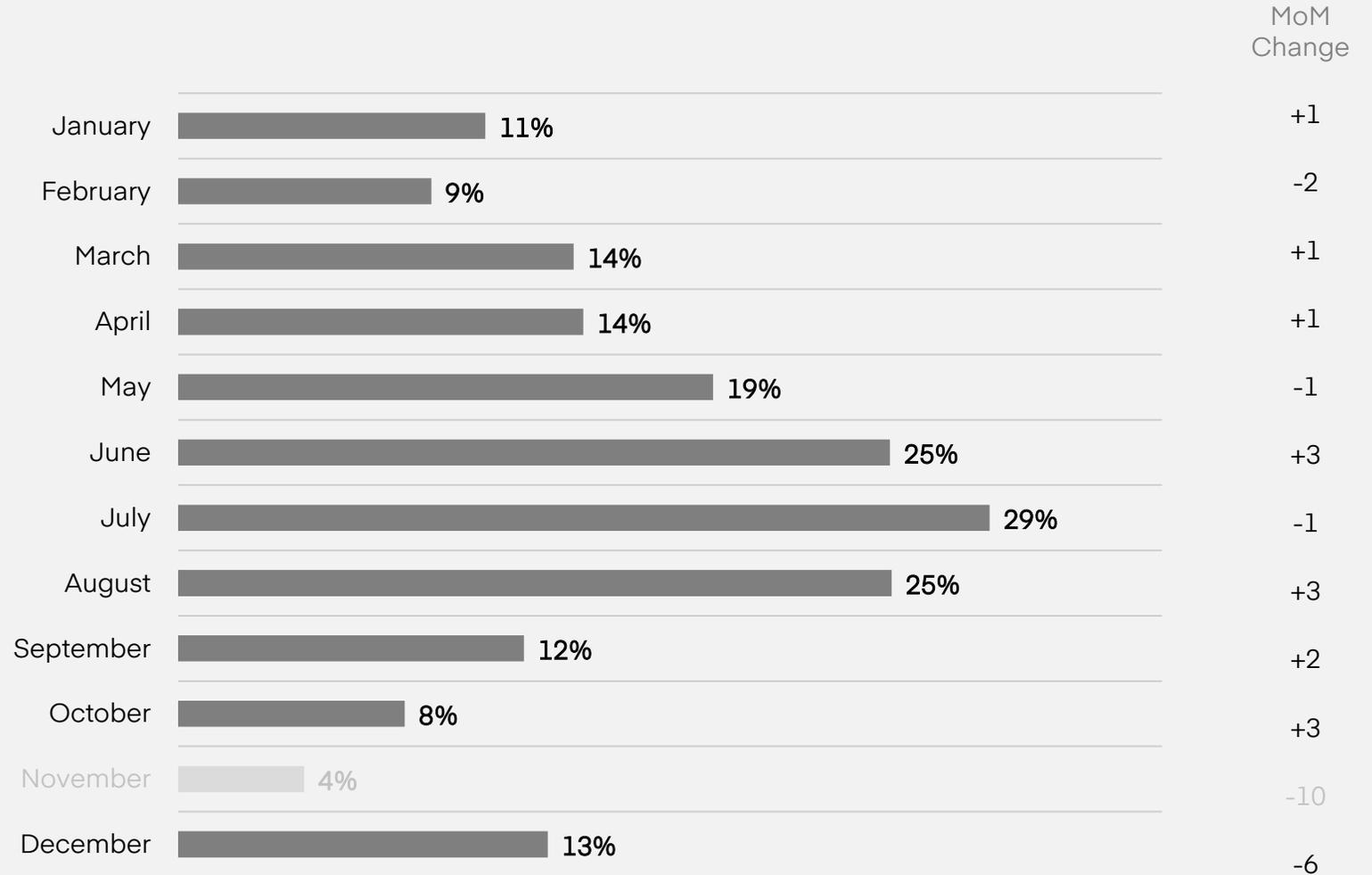
Note: The greyed-out month is the current survey month.

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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=1,186)

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 long-term period have increased from Ontario and the U.S. Fly markets.

The U.S. Drive market shows a decline in long-term travel considerations.

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	28%	-5▼	16%	-14▼	24%	-14▼
Mid	51%	+12▲	55%	+11▲	46%	-
Long	75%	+6▲	55%	-7▼	61%	+5▲

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=1,186)
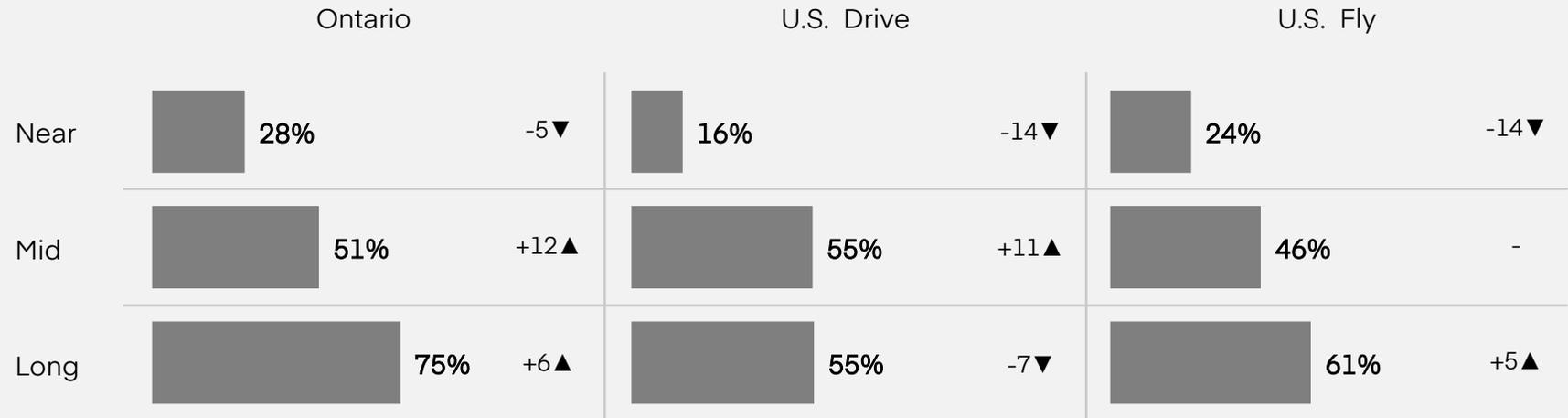
TRAVEL WINDOW: OTHER CANADIAN MARKETS

The share of near-term trips to Ontario has decreased overall. Considerations for mid-term trips has increased, especially for Manitoba, Quebec and Atlantic Canada.

Near-term = <2 months ahead | Mid-term = 3-6 months ahead | Long-term = 7-12 months ahead
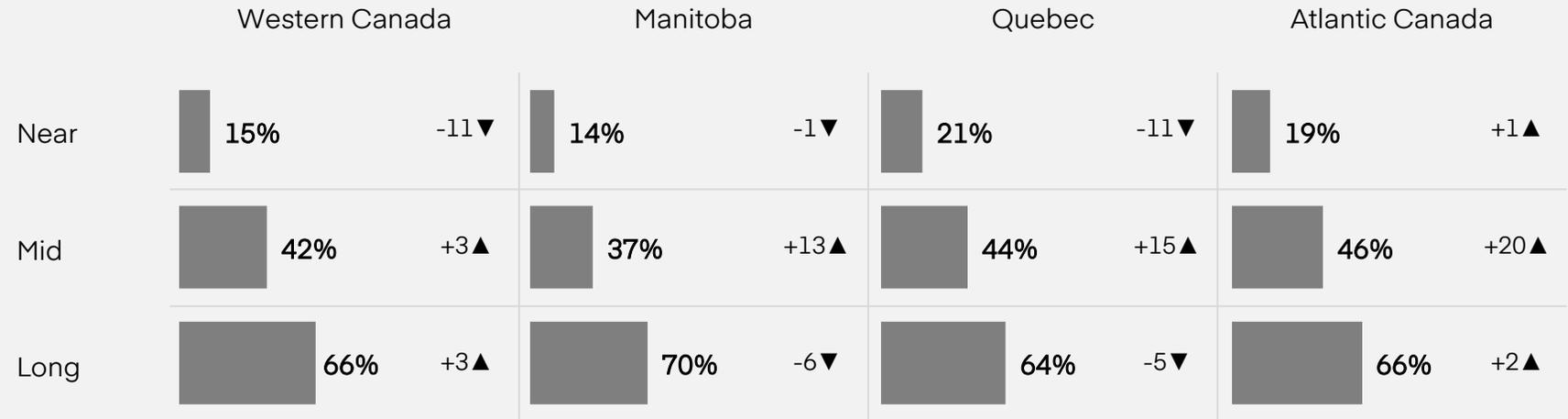
	Western Canada	Manitoba	Quebec	Atlantic Canada
Near	15% -11▼	14% -1▼	21% -11▼	19% +1▲
Mid	42% +3▲	37% +13▲	44% +15▲	46% +20▲
Long	66% +3▲	70% -6▼	64% -5▼	66% +2▲

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=1,186)

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DESTINATION CONSIDERATION

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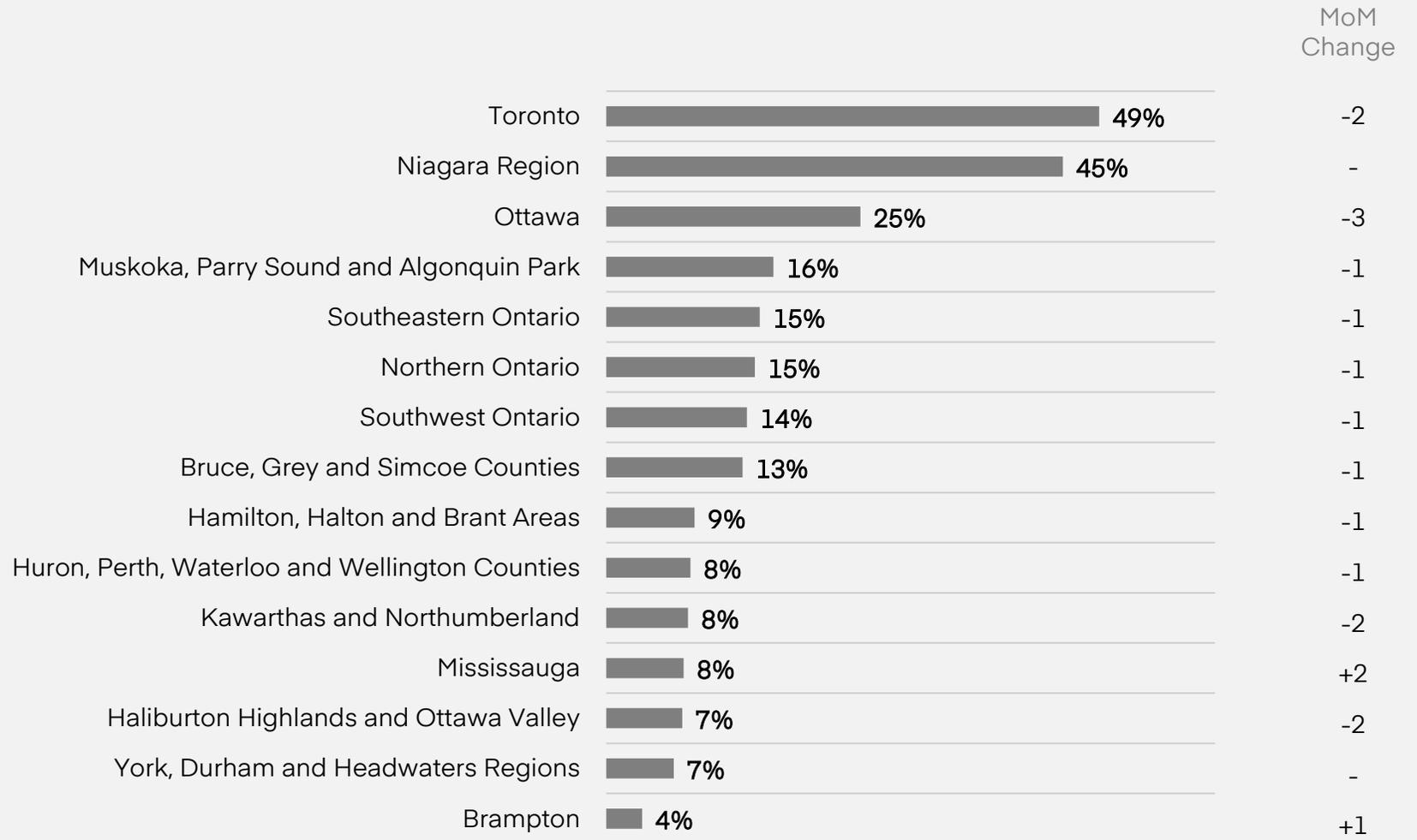ly thinking about visiting for a pleasure trip in the next 12 months. Ottawa follows, with about a quarter expressing intent. This pattern has been consistent with the previous month.

Destination	Percentage	MoM Change
Toronto	49%	-2
Niagara Region	45%	-
Ottawa	25%	-3
Muskoka, Parry Sound and Algonquin Park	16%	-1
Southeastern Ontario	15%	-1
Northern Ontario	15%	-1
Southwest Ontario	14%	-1
Bruce, Grey and Simcoe Counties	13%	-1
Hamilton, Halton and Brant Areas	9%	-1
Huron, Perth, Waterloo and Wellington Counties	8%	-1
Kawarthas and Northumberland	8%	-2
Mississauga	8%	+2
Haliburton Highlands and Ottawa Valley	7%	-2
York, Durham and Headwaters Regions	7%	-
Brampton	4%	+1

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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=1,156)

BRAND PERCEPTION

Ontario maintains a strong reputation as a top leisure destination, celebrated for its unique experiences and overall value. Travellers continue to hold highly positive views of the province. Popular activities vary by season, with shopping and dining 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

SEASONAL TRAVEL INTENT

Half of travellers planning a trip to Ontario are considering Summer 2026 as their preferred travel period. Summer travel intent has remained high since the previous month; while winter and fall intents have decreased.
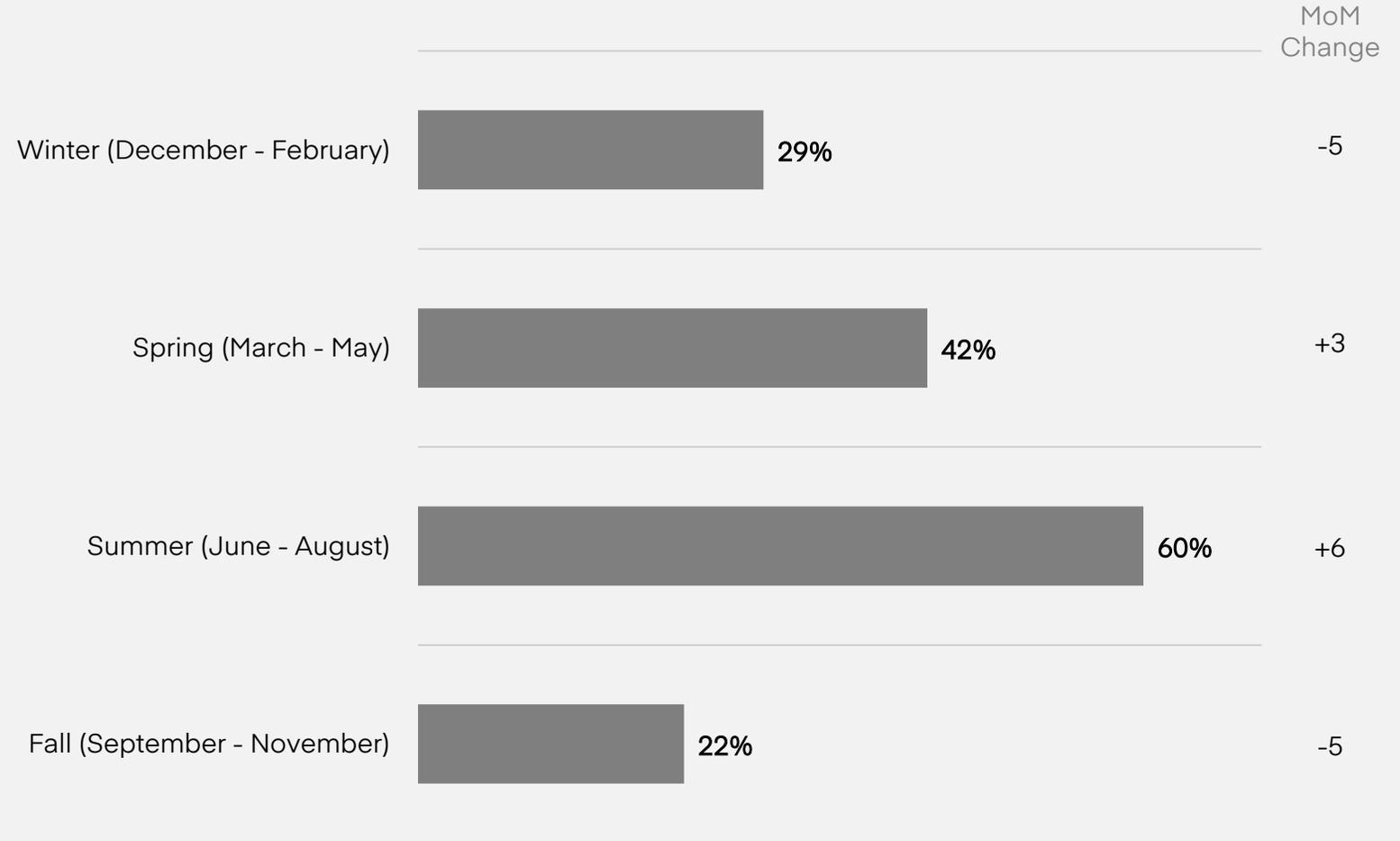
		MoM Change
Winter (December - February)	29%	-5
Spring (March - May)	42%	+3
Summer (June - August)	60%	+6
Fall (September - November)	22%	-5

*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=1,186)

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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.

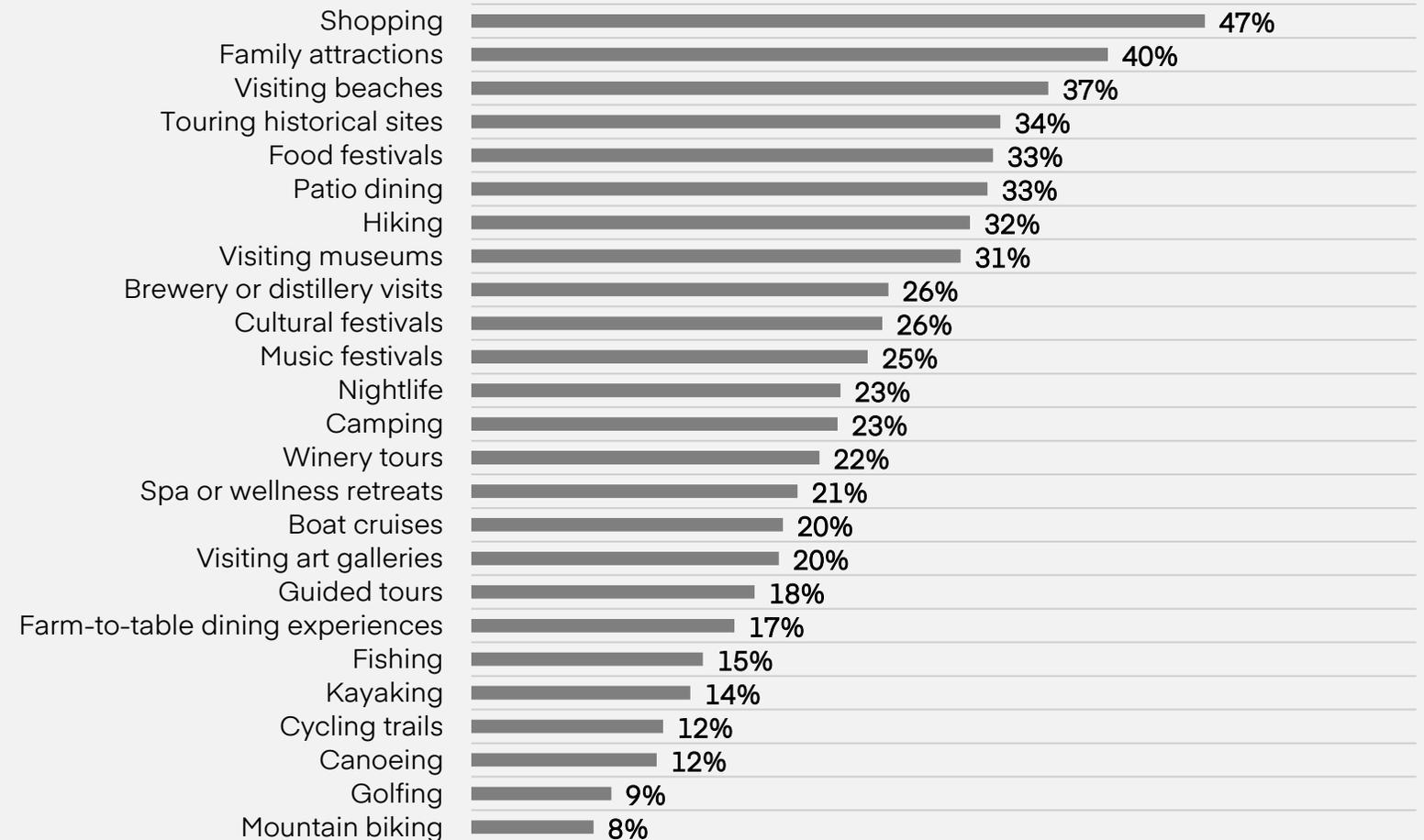| Activity	%
Shopping	49%
Dining at local restaurants	48%
Family attractions	44%
Winter festivals	42%
Holiday markets	34%
Nightlife	34%
Spa or wellness retreats	33%
Brewery or distillery visits	28%
Visiting museums	26%
Touring historic sites	26%
Visiting art galleries	23%
Ice skating	21%
Winery tours	20%
Maple syrup experiences	19%
Guided tours	17%
Ice fishing	16%
Snowboarding	16%
Downhill skiing	16%
Snowmobiling	15%
Cross-country skiing	14%
Horse-drawn sleigh rides	11%
Snowshoeing	11%
Dog sledding	9%

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

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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=325)
Only overall ≥ 5% shown

TOP SPRING/SUMMER ACTIVITIES

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

Activity	Percentage
Shopping	47%
Family attractions	40%
Visiting beaches	37%
Touring historical sites	34%
Food festivals	33%
Patio dining	33%
Hiking	32%
Visiting museums	31%
Brewery or distillery visits	26%
Cultural festivals	26%
Music festivals	25%
Nightlife	23%
Camping	23%
Winery tours	22%
Spa or wellness retreats	21%
Boat cruises	20%
Visiting art galleries	20%
Guided tours	18%
Farm-to-table dining experiences	17%
Fishing	15%
Kayaking	14%
Cycling trails	12%
Canoeing	12%
Golfing	9%
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)
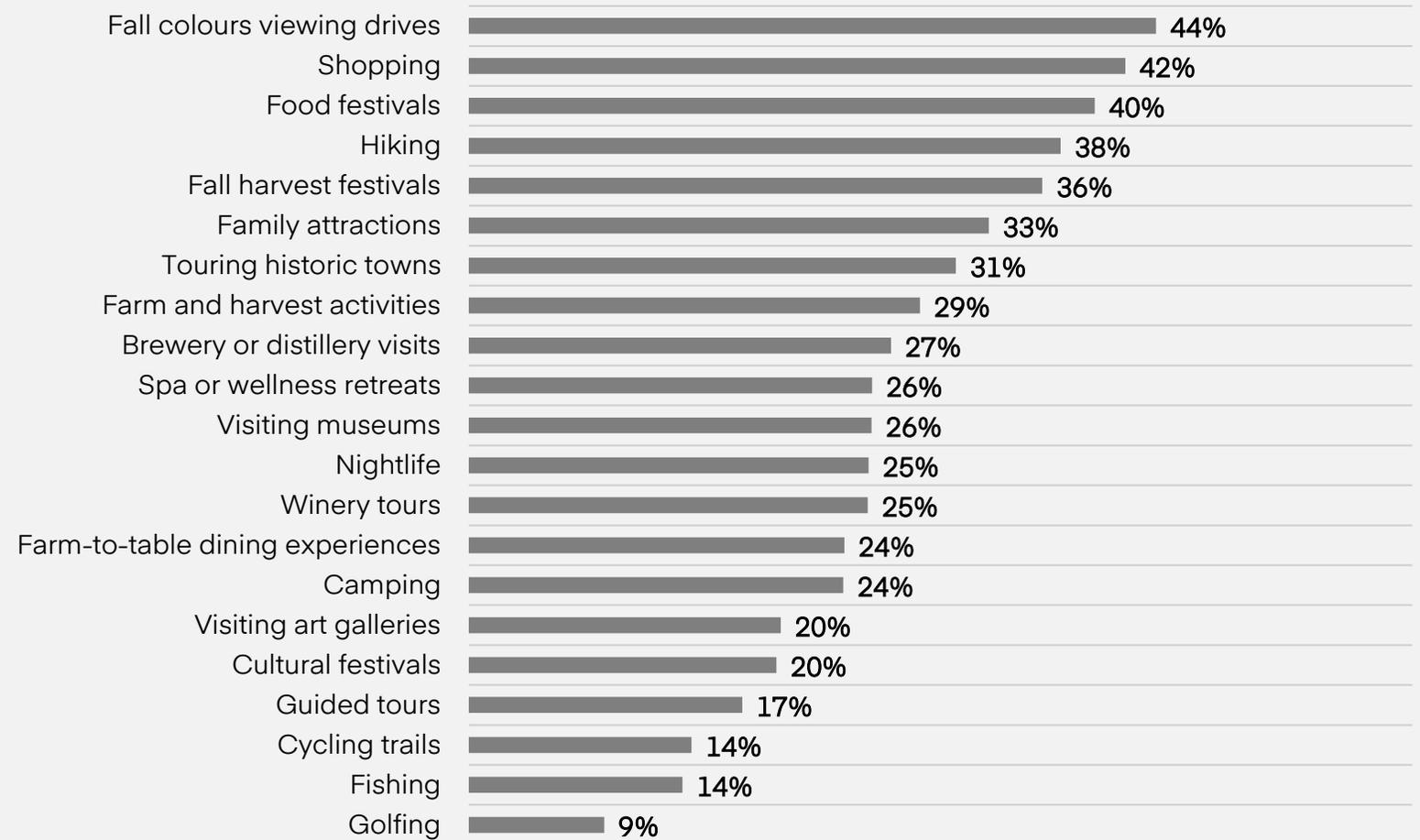Respondents who are thinking about travelling during the Spring/Summer months. (n=960)
Only overall ≥ *5% shown*

TOP FALL ACTIVITIES

Scenic fall drives, shopping and family attractions top the list of planned activities for visitors to Ontario during the fall season.
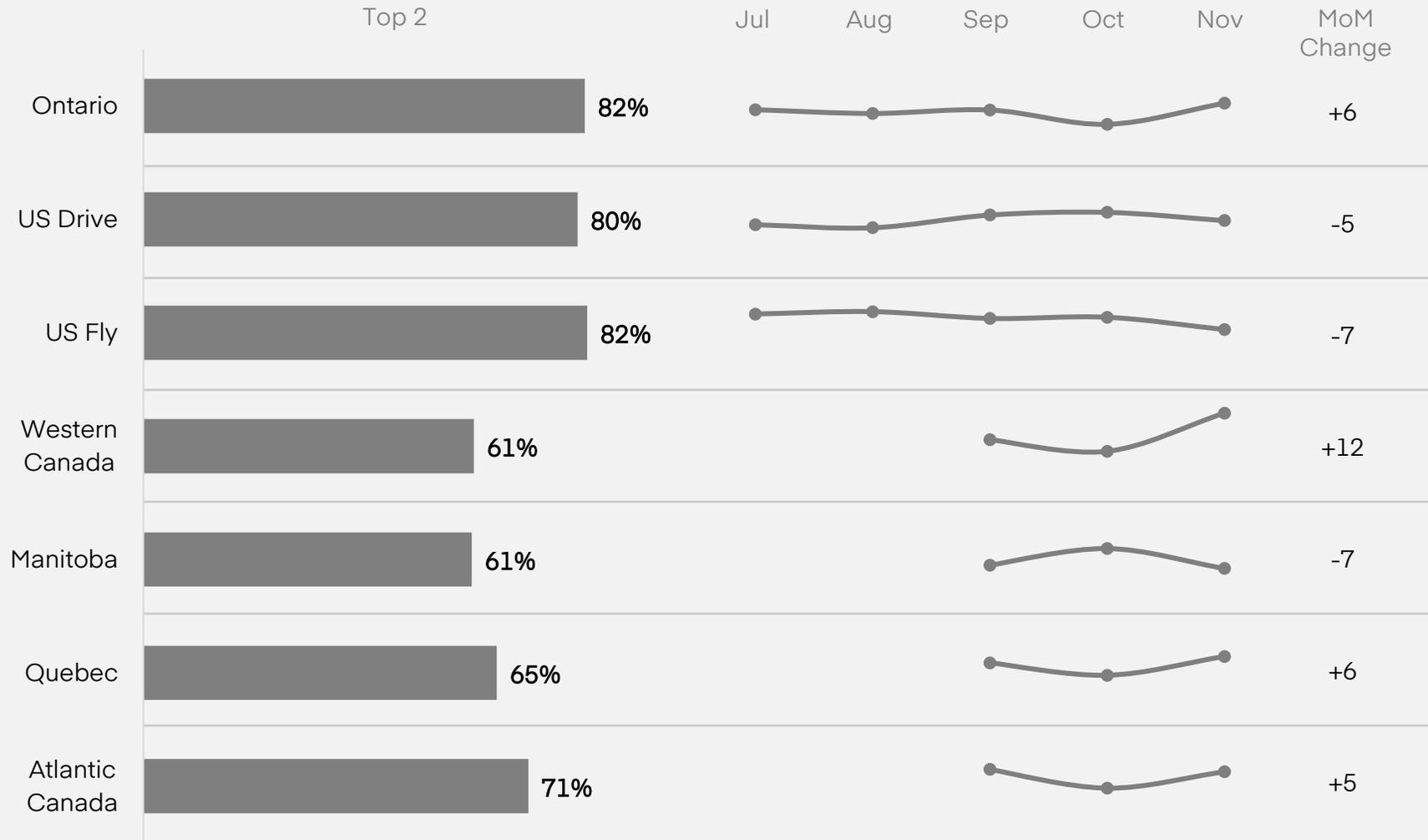
Activity	%
Fall colours viewing drives	44%
Shopping	42%
Food festivals	40%
Hiking	38%
Fall harvest festivals	36%
Family attractions	33%
Touring historic towns	31%
Farm and harvest activities	29%
Brewery or distillery visits	27%
Spa or wellness retreats	26%
Visiting museums	26%
Nightlife	25%
Winery tours	25%
Farm-to-table dining experiences	24%
Camping	24%
Visiting art galleries	20%
Cultural festivals	20%
Guided tours	17%
Cycling trails	14%
Fishing	14%
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=252)
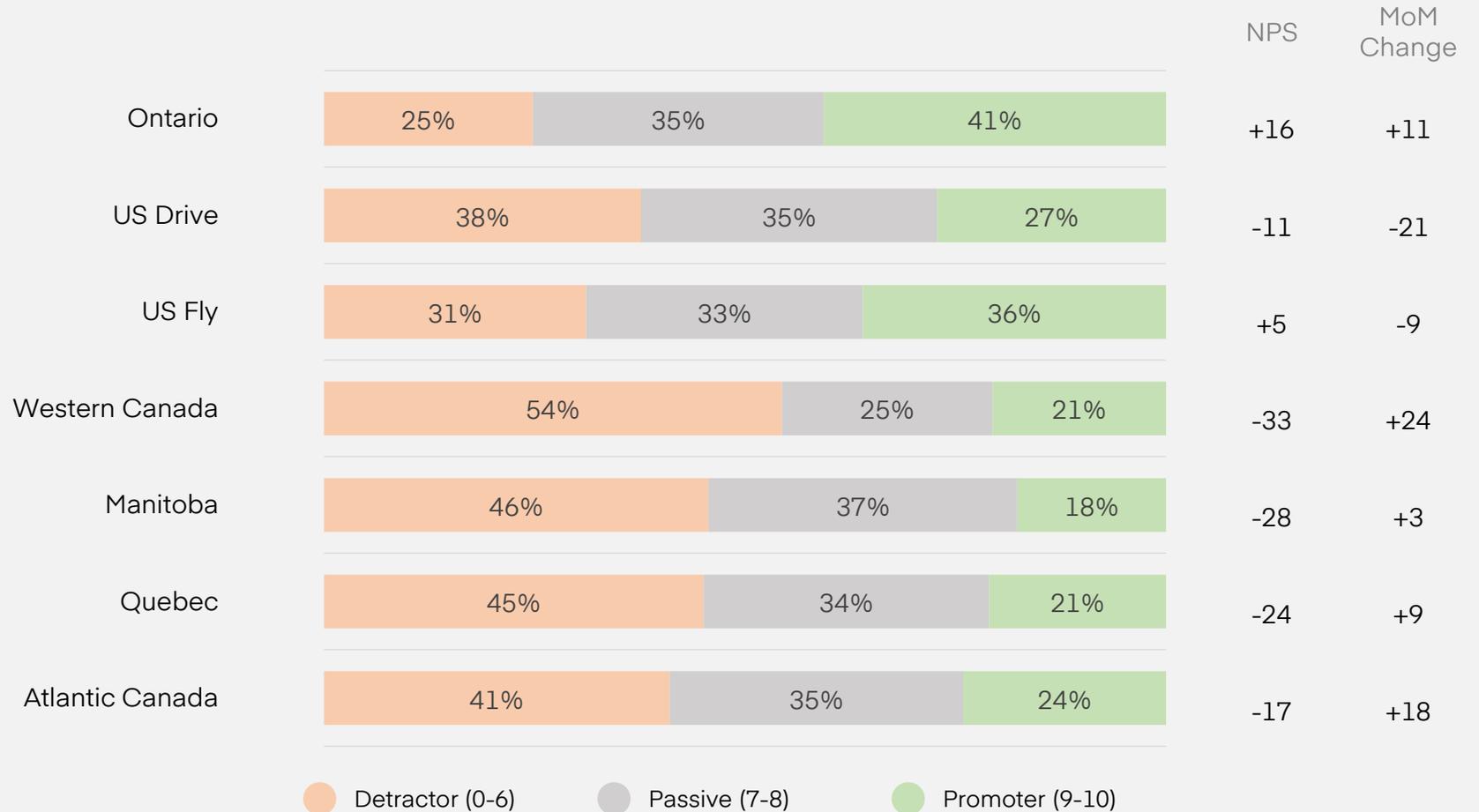Only overall ≥ *5% shown*

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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 Ontario and the two U.S. markets. Positive perceptions towards Ontario has significantly increased in Western Canada from the previous month.

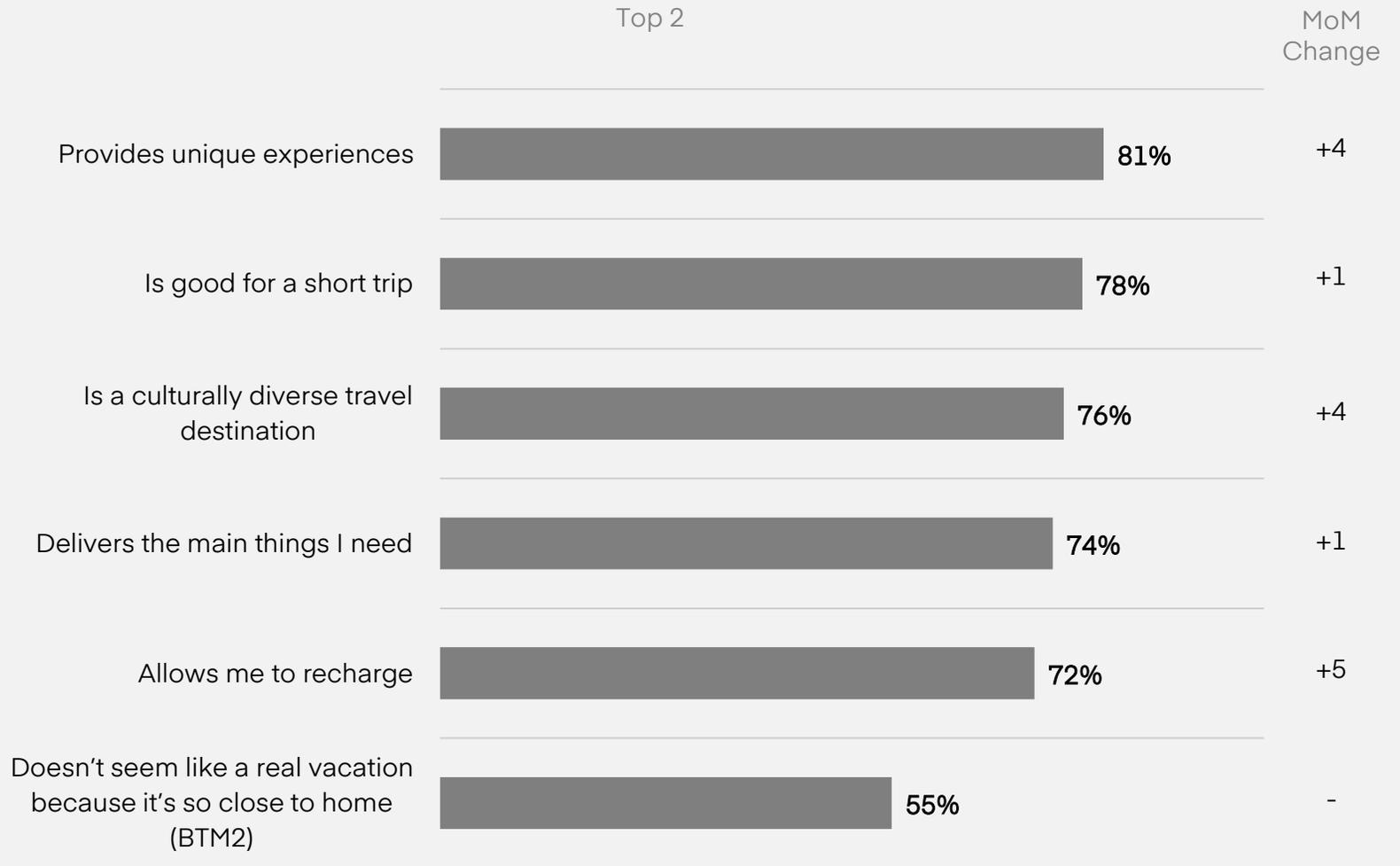| Top 2		Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	82%						+6
US Drive	80%						-5
US Fly	82%						-7
Western Canada	61%						+12
Manitoba	61%						-7
Quebec	65%						+6
Atlantic Canada	71%						+5

Q3. How would you rate Ontario, Canada as a pleasure travel destination? (5-point scale)
All respondents. (n=1,868)

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NET PROMOTER SCORE

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

		NPS	MoM Change
Ontario	25% / 35% / 41%	+16	+11
US Drive	38% / 35% / 27%	-11	-21
US Fly	31% / 33% / 36%	+5	-9
Western Canada	54% / 25% / 21%	-33	+24
Manitoba	46% / 37% / 18%	-28	+3
Quebec	45% / 34% / 21%	-24	+9
Atlantic Canada	41% / 35% / 24%	-17	+18

● 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=2,010)

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DESTINATION IMAGE OF ONTARIO
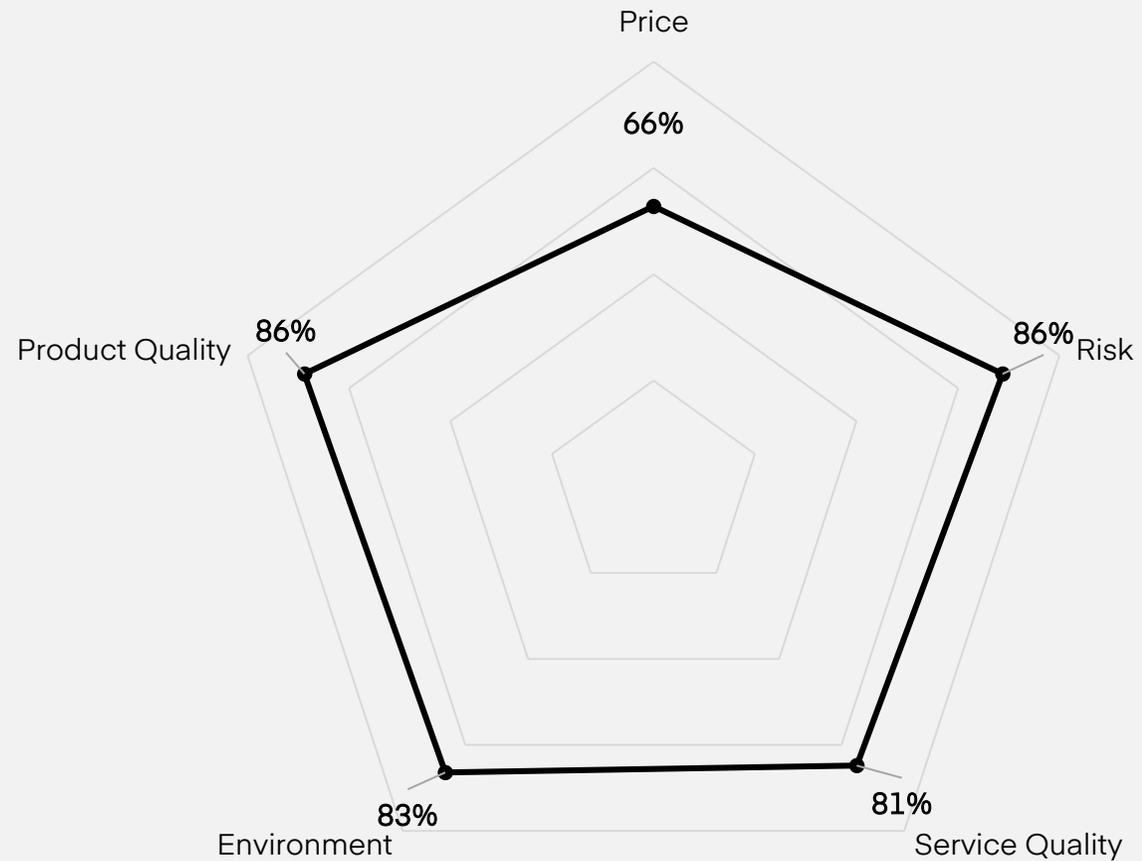
Ontario is widely recognized for delivering unique experiences and remains a top choice for short trips and for being culturally diverse.

Top 2

MoM Change

	Top 2	MoM Change
Provides unique experiences	81%	+4
Is good for a short trip	78%	+1
Is a culturally diverse travel destination	76%	+4
Delivers the main things I need	74%	+1
Allows me to recharge	72%	+5
Doesn't seem like a real vacation because it's so close to home (BTM2)	55%	-

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=1,828)

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CONSUMER PERCEIVED VALUE

Overall, Ontario continues to be perceived as offering strong value to travellers, with this sentiment remaining consistent compared to previous months.

Price
66%

Risk
86%

Service Quality
81%

Environment
83%

Product Quality
86%

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DESTINATION ONTARIO

Algonquin Park

♀ Algonquin Park

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 tools are gaining traction, especially across the U.S. markets, primarily used for researching attractions, finding destination ideas, and gathering general travel advice.

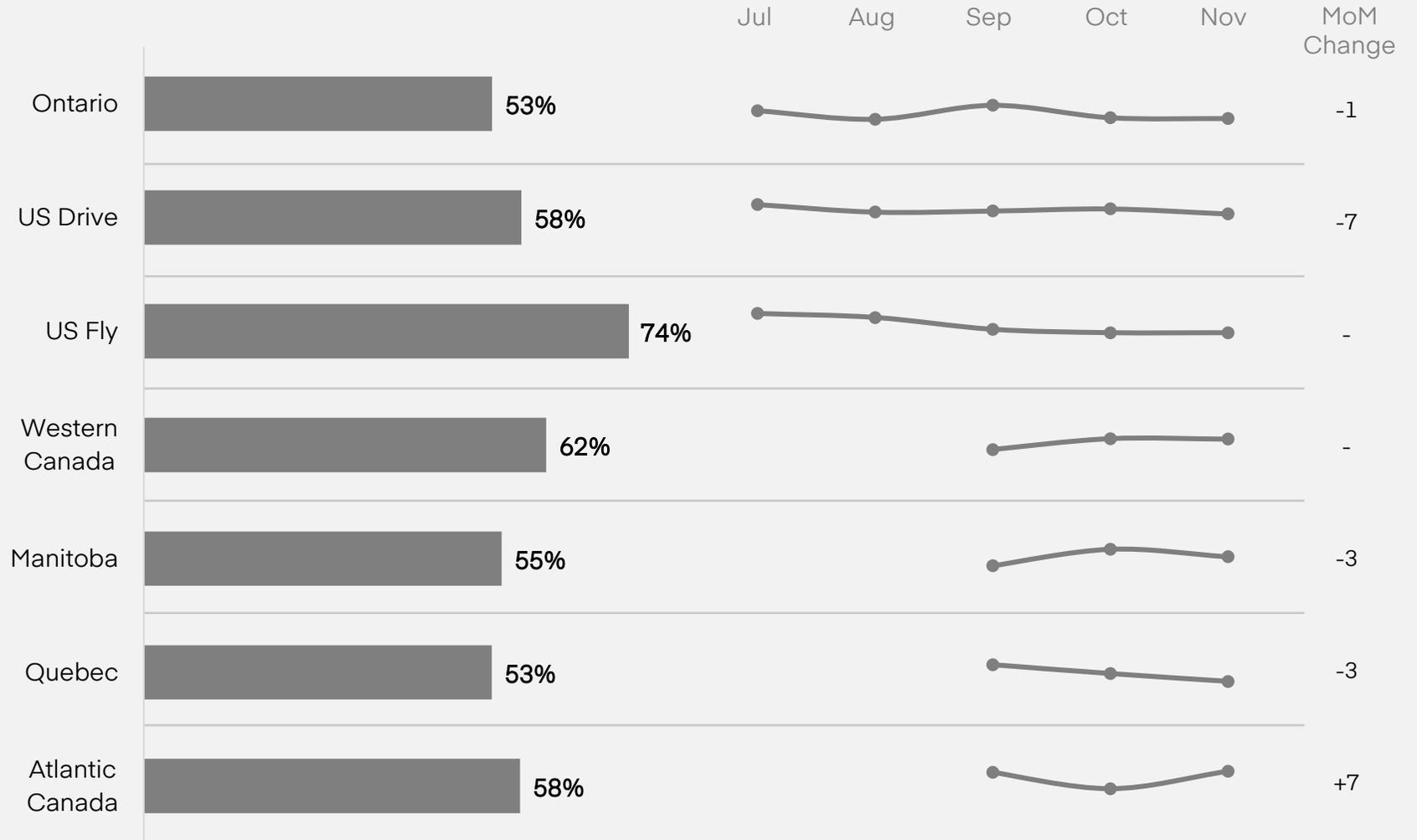**Tags -** Explore more on DOinsights.crg.ca

Travel Information   Media Usage   AI tools
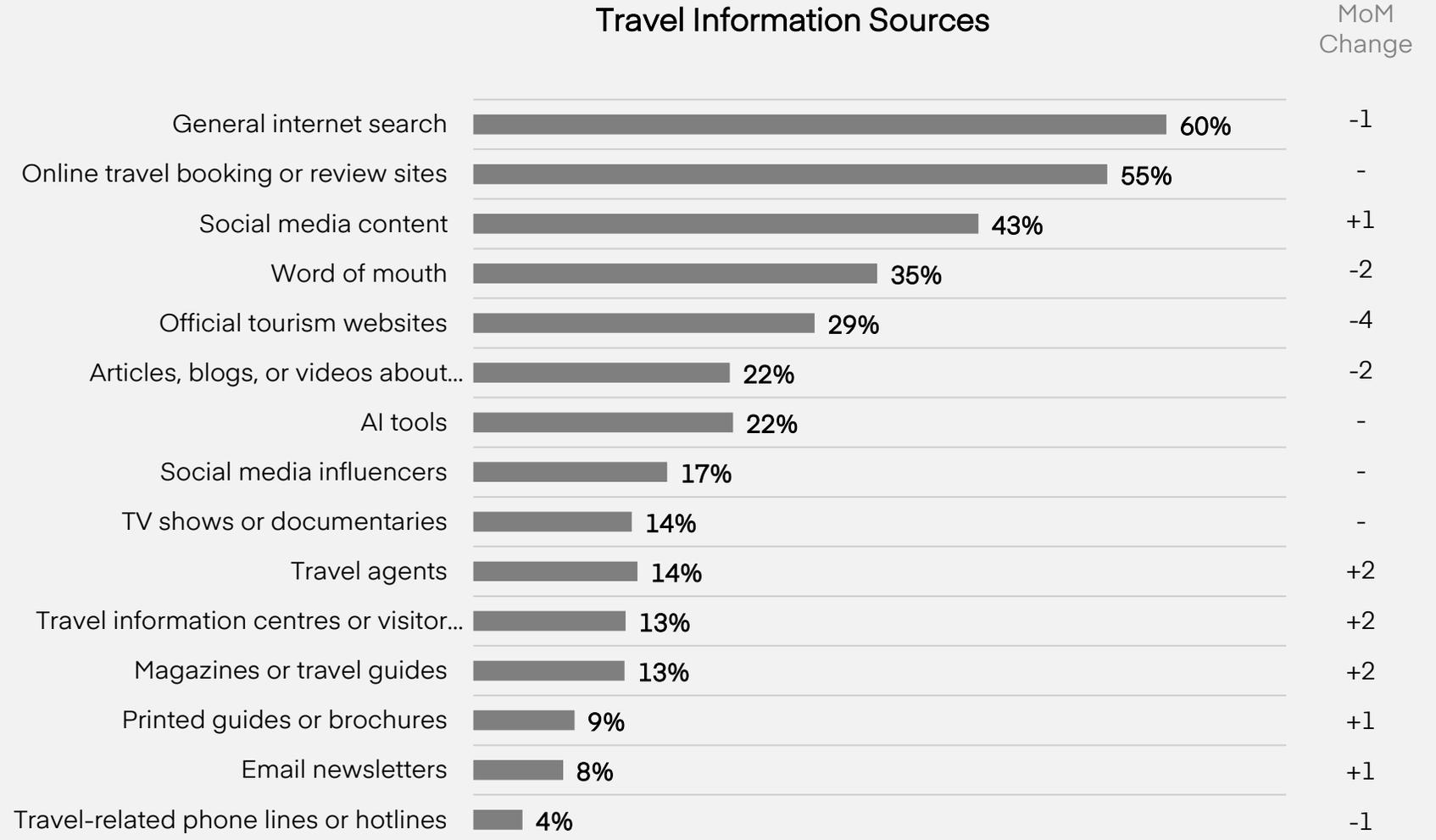
INFORMATION SEARCH

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 these markets. Information seeking has decreased in the U.S. Drive market.

	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario					53%	-1
US Drive					58%	-7
US Fly					74%	-
Western Canada					62%	-
Manitoba					55%	-3
Quebec					53%	-3
Atlantic Canada					58%	+7

I1. In the past month, have you looked for information about travelling? (Single-select)
All respondents. (n=2,010)

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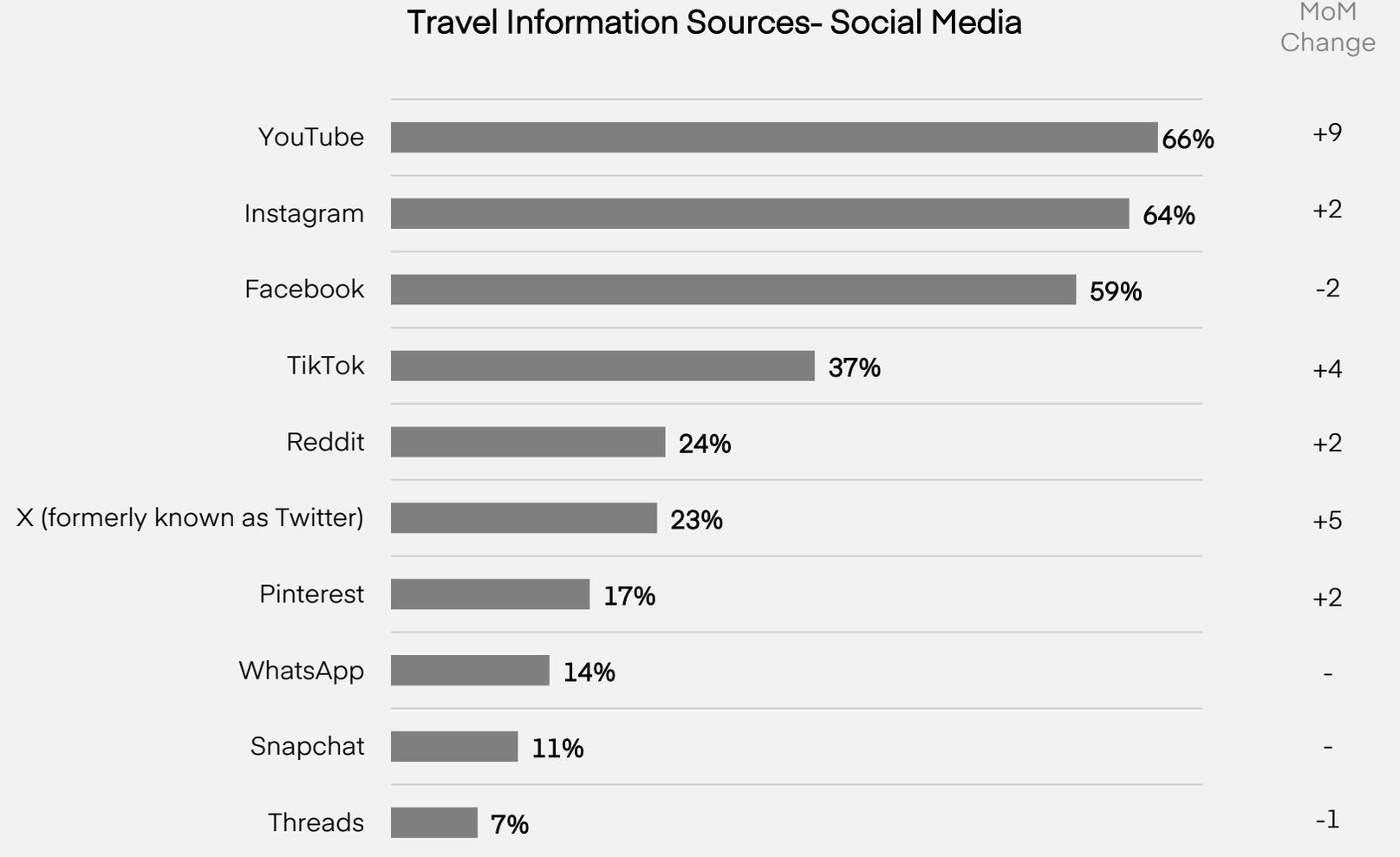
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ONTARIO TRAVEL INFORMATION SOURCES

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	MoM Change
General internet search	60%	-1
Online travel booking or review sites	55%	-
Social media content	43%	+1
Word of mouth	35%	-2
Official tourism websites	29%	-4
Articles, blogs, or videos about…	22%	-2
AI tools	22%	-
Social media influencers	17%	-
TV shows or documentaries	14%	-
Travel agents	14%	+2
Travel information centres or visitor…	13%	+2
Magazines or travel guides	13%	+2
Printed guides or brochures	9%	+1
Email newsletters	8%	+1
Travel-related phone lines or hotlines	4%	-1

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=1,172)
Only overall ≥ *5% shown*

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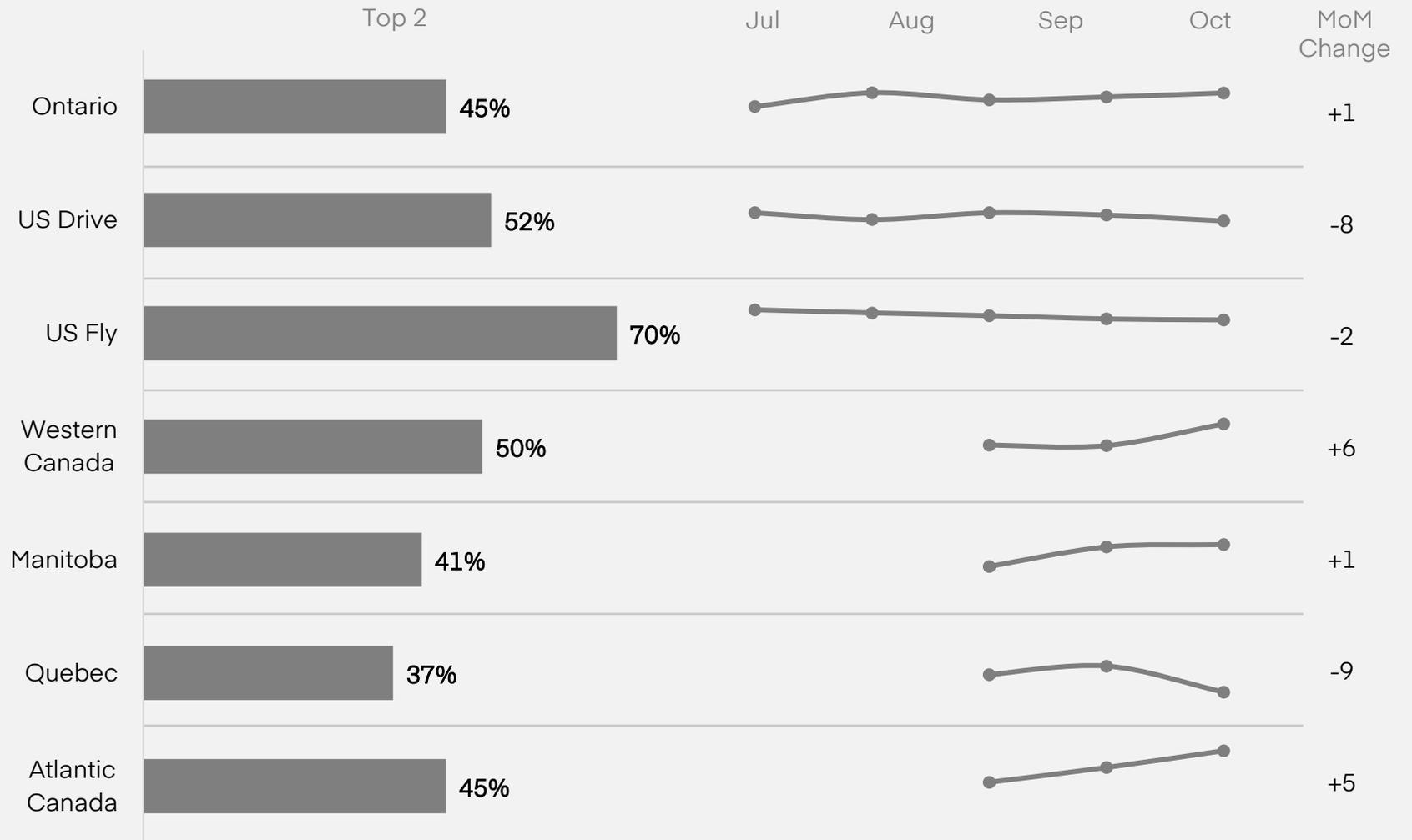# SOCIAL MEDIA USAGE FOR TRAVEL INFORMATION

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

Travel Information Sources- Social Media

Platform	Percentage	MoM Change
YouTube	66%	+9
Instagram	64%	+2
Facebook	59%	-2
TikTok	37%	+4
Reddit	24%	+2
X (formerly known as Twitter)	23%	+5
Pinterest	17%	+2
WhatsApp	14%	-
Snapchat	11%	-
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=574)
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.
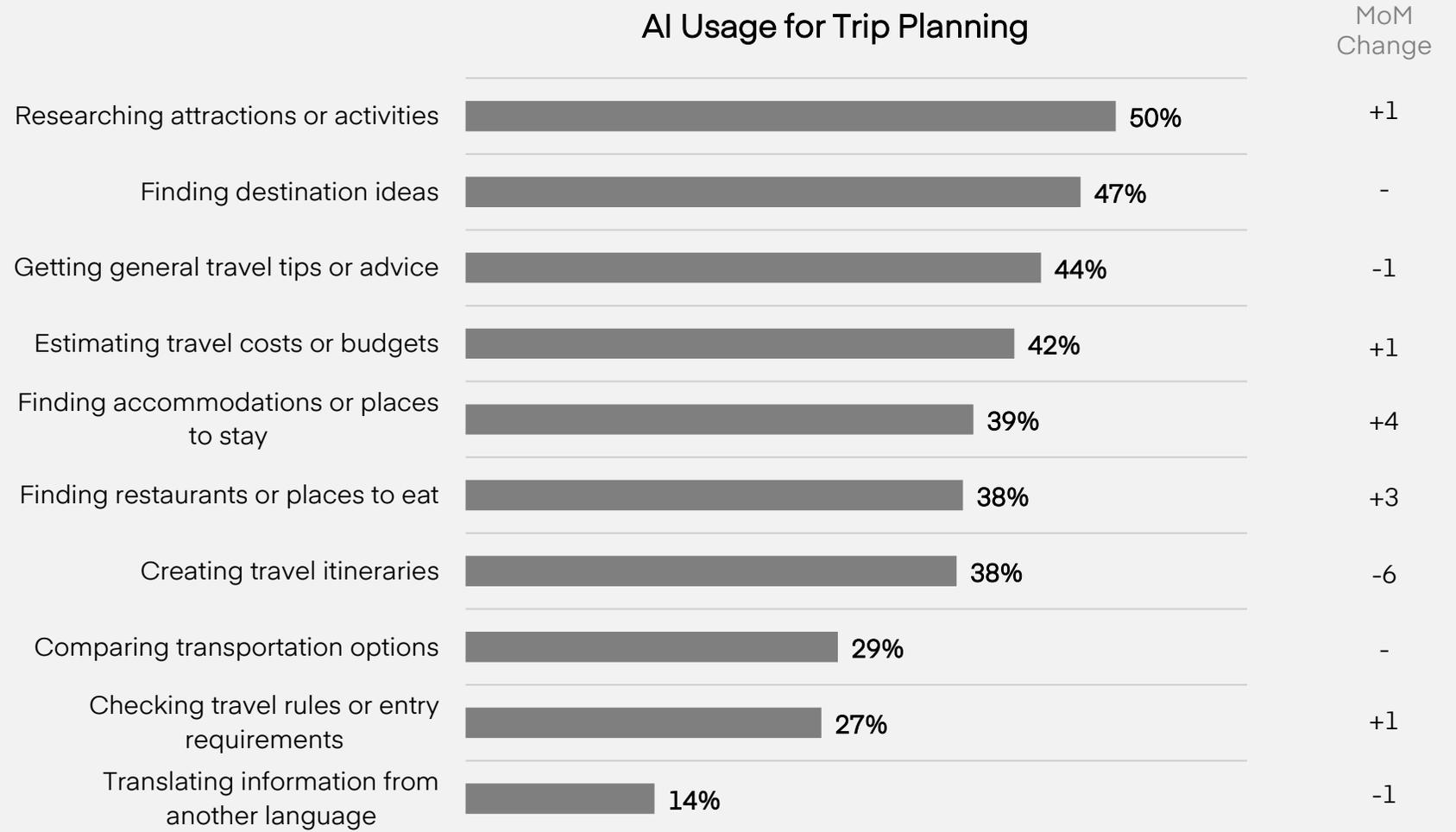
	Top 2	Jul	Aug	Sep	Oct	MoM Change
Ontario	45%					+1
US Drive	52%					-8
US Fly	70%					-2
Western Canada	50%					+6
Manitoba	41%					+1
Quebec	37%					-9
Atlantic Canada	45%					+5

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=1,858)

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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

Category	Usage	MoM 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
Finding accommodations or places to stay	39%	+4
Finding restaurants or places to eat	38%	+3
Creating travel itineraries	38%	-6
Comparing transportation options	29%	-
Checking travel rules or entry requirements	27%	+1
Translating information from another language	14%	-1

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=610)
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

⚲ **Windsor**

TRAVEL AS A WORTHWHILE INVESTMENT

U.S. Fly and Ontario travellers show high agreement that travel is a worthwhile investment, with other markets following closely.

Since September, U.S. Drive travellers have shown a slight decline in agreement, and Manitoba has reported a decline (-7) compared to the previous month.

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


	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	70%						-
US Drive	69%						-4
US Fly	83%						+1
Western Canada	63%						+4
Manitoba	67%						-7
Quebec	51%						-5
Atlantic Canada	65%						+1
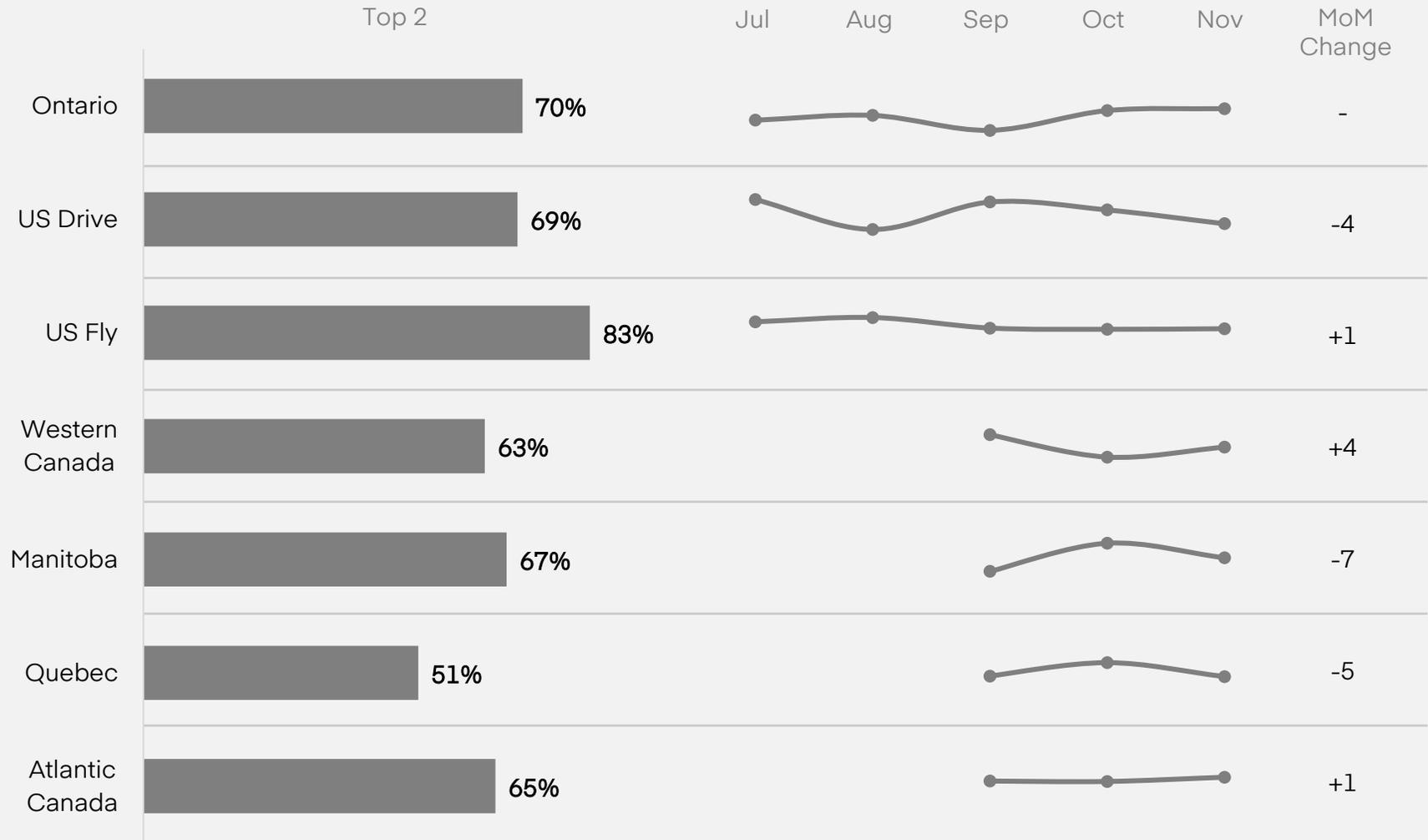
T4. How much do you agree or disagree with the following statements? [I feel travel is a worthwhile investment, even in the current economic climate.] (Excludes "don't know") (5-point scale)
All respondents. (n=1,963)

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INFLUENCE OF EXCHANGE RATE ON TRAVEL TO ONTARIO

The exchange rate continues to motivate more US Fly travellers than Drive travellers, though its influence has declined across both markets compared to earlier months.

This downward trend suggests the exchange rate is becoming less influential in travellers' decisions to visit Ontario over time.
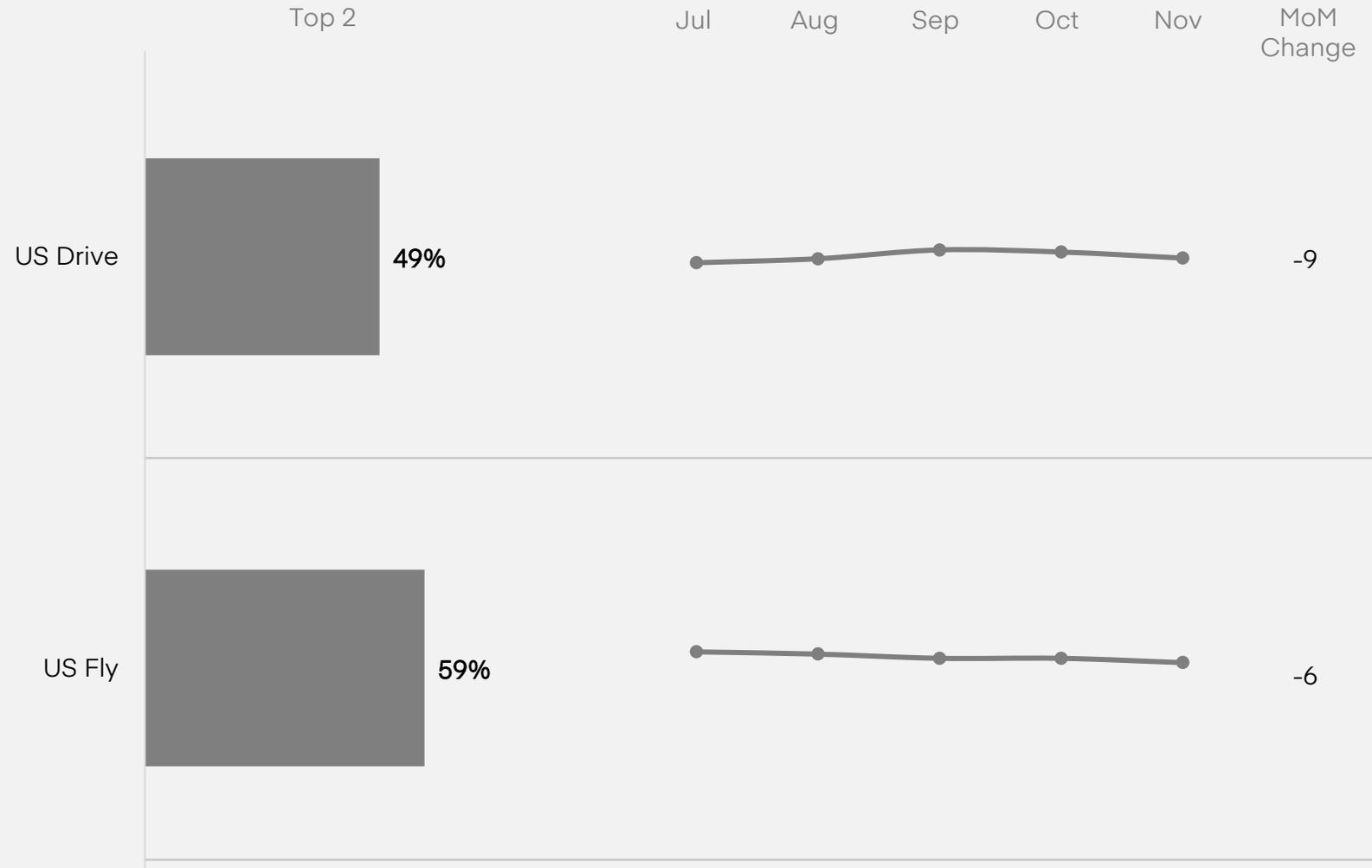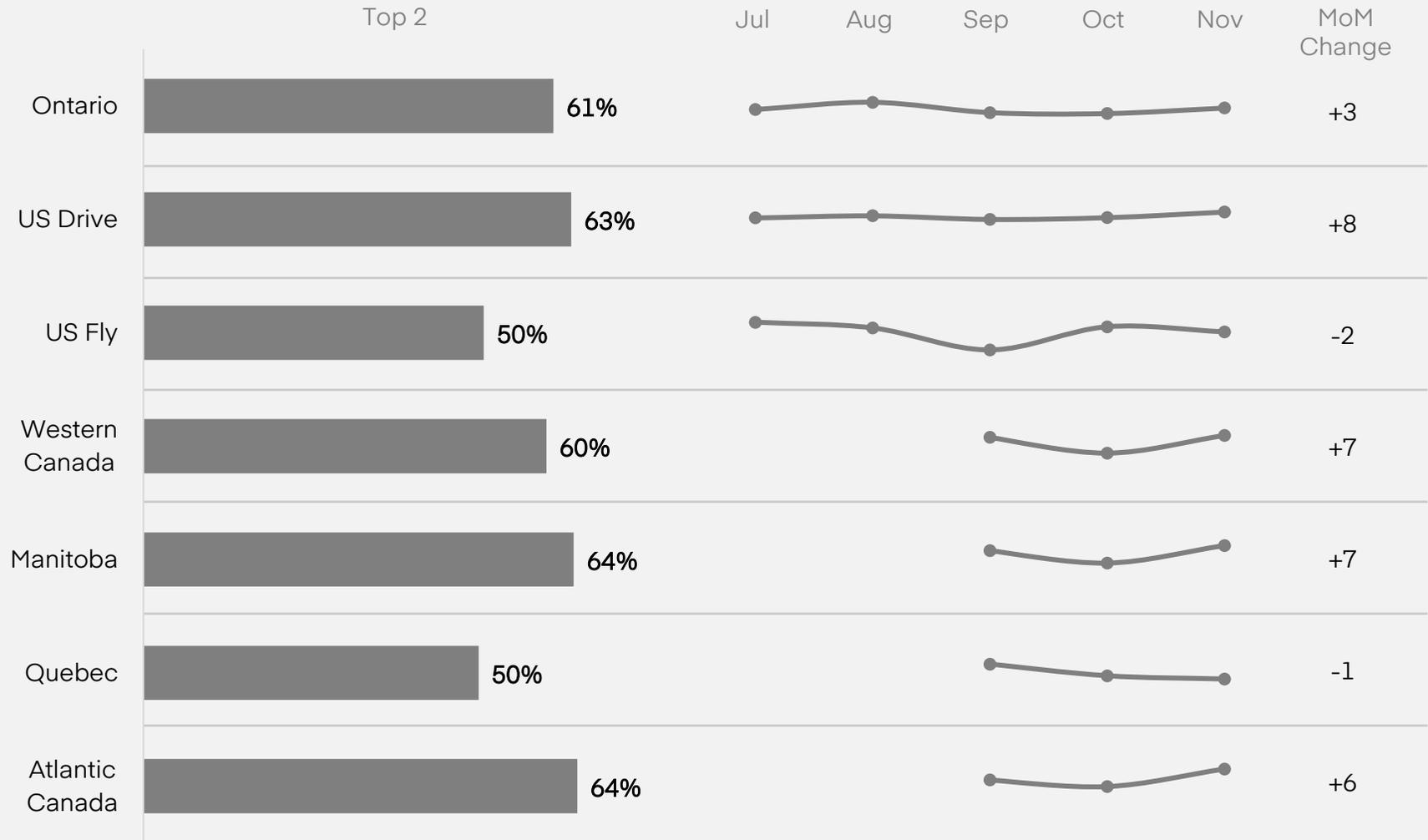

	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
US Drive	49%						-9
US Fly	59%						-6

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=478)

FINANCIAL PRESSURES IMPACTING FUTURE TRAVEL PLANS

Financial pressures continue to shape travel plans, with the greatest impact seen among travellers from Manitoba, Atlantic Canada, and the U.S. Drive market, while other regions show similar sensitivity to financial constraints.

Across most regions, concern is increasing, especially among U.S. Drive (+8), Western Canada (+7), Manitoba (+7), and Atlantic Canada (+6) compared to the previous month.

	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	61%						+3
US Drive	63%						+8
US Fly	50%						-2
Western Canada	60%						+7
Manitoba	64%						+7
Quebec	50%						-1
Atlantic Canada	64%						+6

T5. How much do you agree or disagree with the following statement? [Financial pressures have impacted my travel plans in the next 12 months] (Excludes "don't know") (5-point scale)
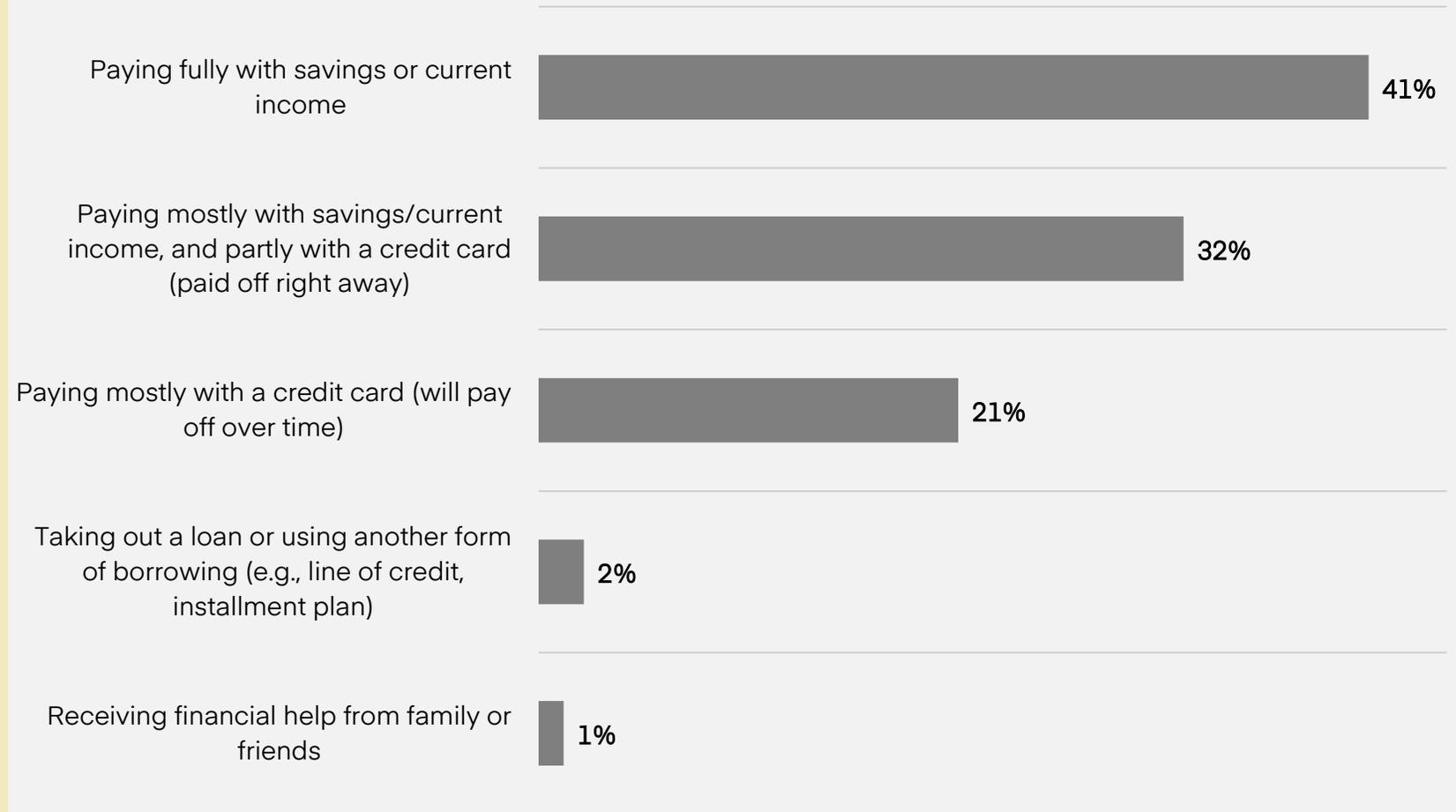All respondents. (n=1,995)

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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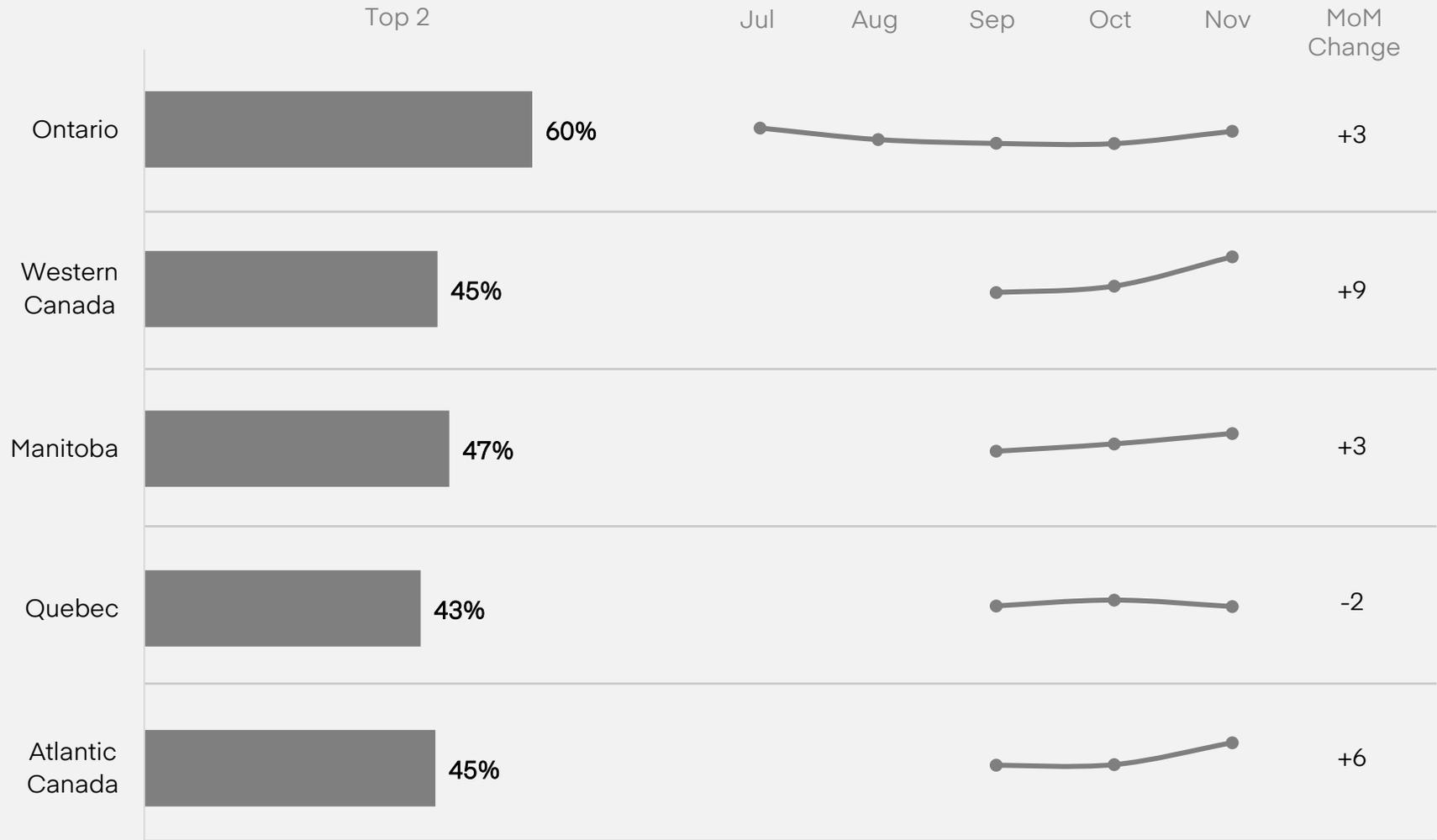| Payment method	%
Paying fully with savings or current income	41%
Paying mostly with savings/current income, and partly with a credit card (paid off right away)	32%
Paying mostly with a credit card (will pay off over time)	21%
Taking out a loan or using another form of borrowing (e.g., line of credit, 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=2,010)

IMPACT OF INTERNATIONAL EXCHANGE RATES ON DOMESTIC TRAVEL

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 have remained relatively stable in their likelihood to travel to Ontario for this reason, with Western Canada and Atlantic Canada showing an increase compared to the previous month.

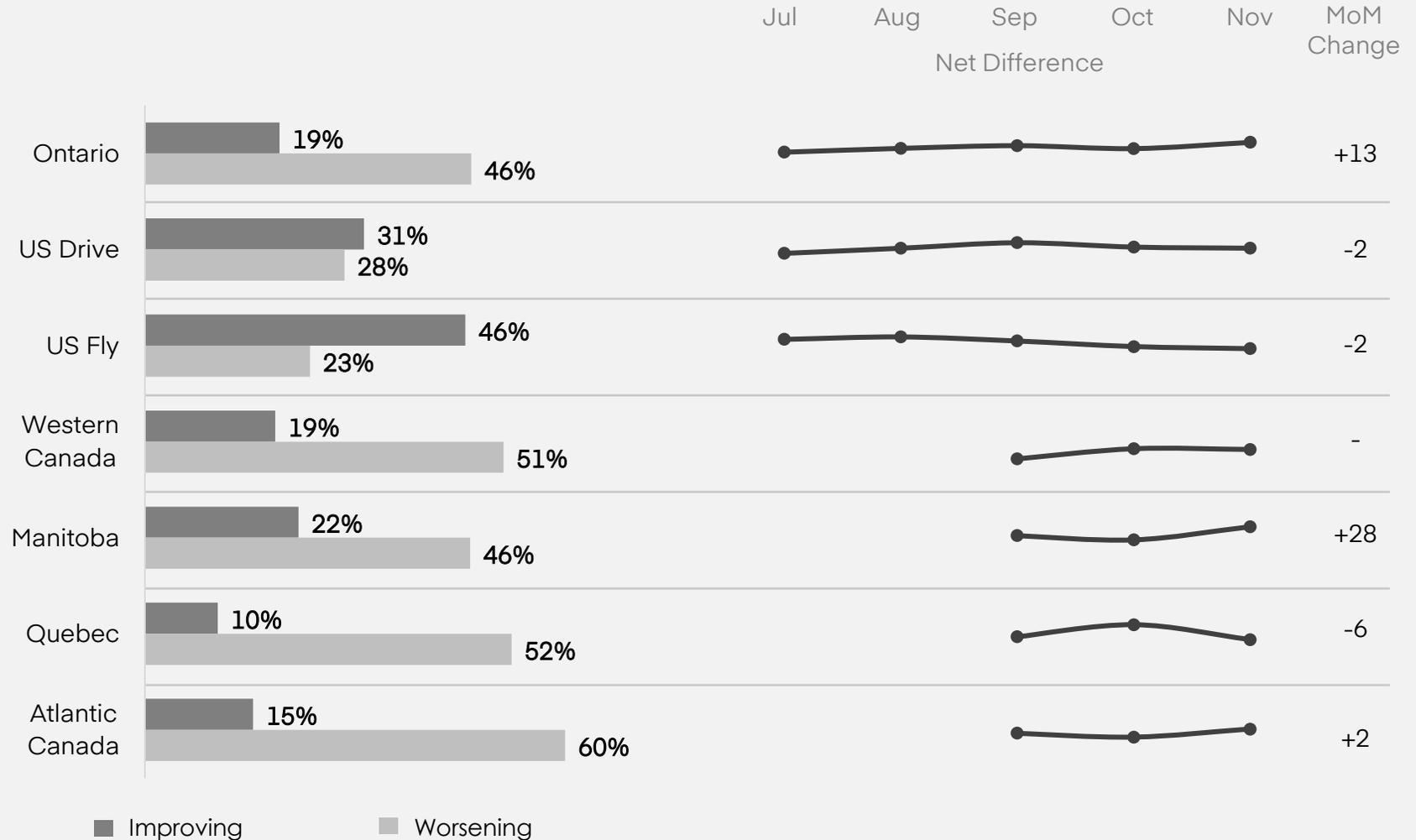|	Top 2		Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	60%							+3
Western Canada	45%							+9
Manitoba	47%							+3
Quebec	43%							-2
Atlantic Canada	45%							+6

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=1,469)

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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, but Manitoba stands out with a significant rise (+28) in those who believe the relationship will improve rather than worsen compared to last month. Ontario travellers also show a notable increase (+13).

*Trend lines represents the difference between improving and worsening.

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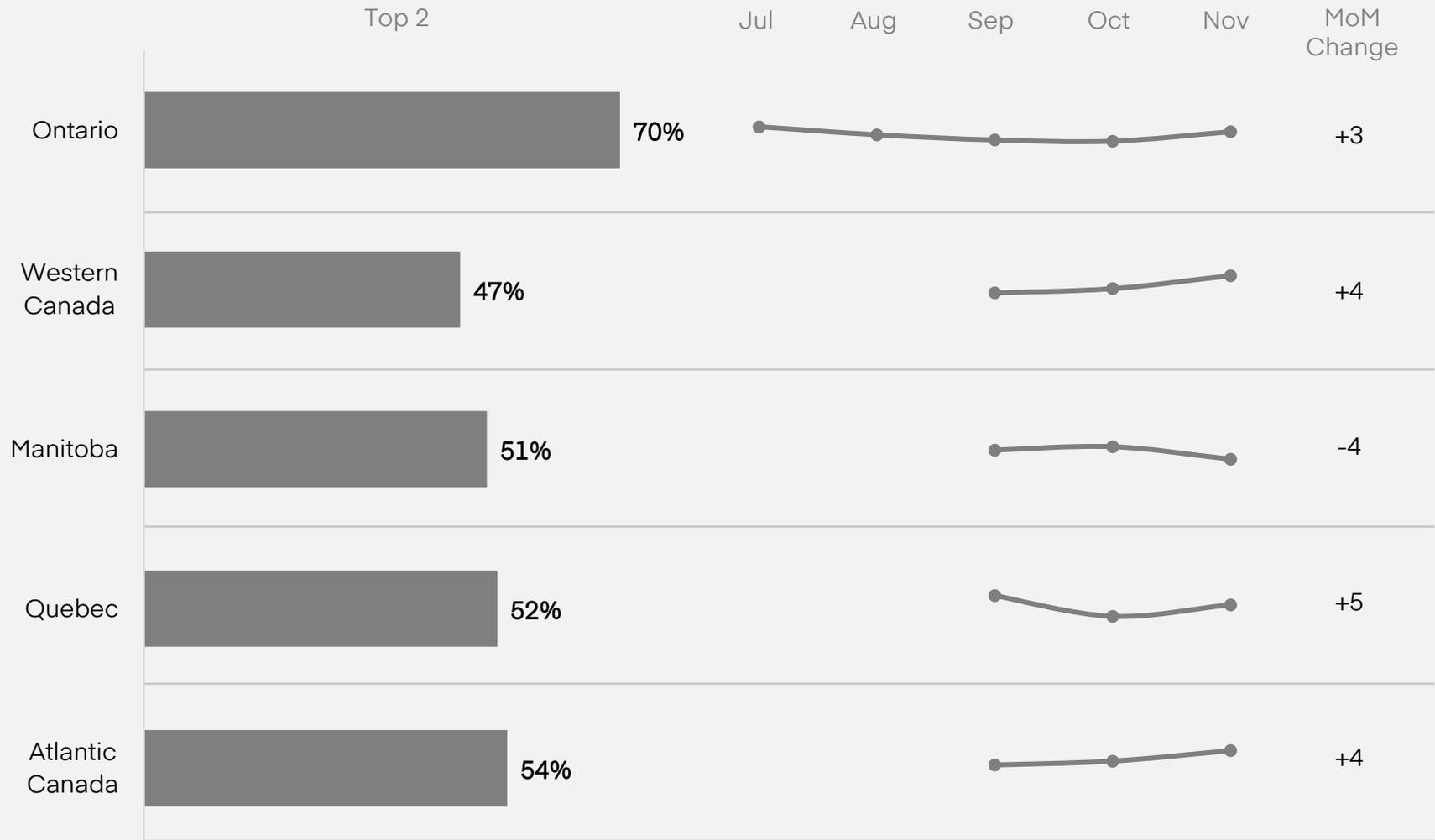|	Jul	Aug	Sep	Oct	Nov	MoM Change
			Net Difference			
Ontario	19% / 46%					+13
US Drive	31% / 28%					-2
US Fly	46% / 23%					-2
Western Canada	19% / 51%					-
Manitoba	22% / 46%					+28
Quebec	10% / 52%					-6
Atlantic Canada	15% / 60%					+2

■ Improving   ■ Worsening

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=1,825)

37

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 both show a slight increased interest in travelling to Ontario for this reason since September.

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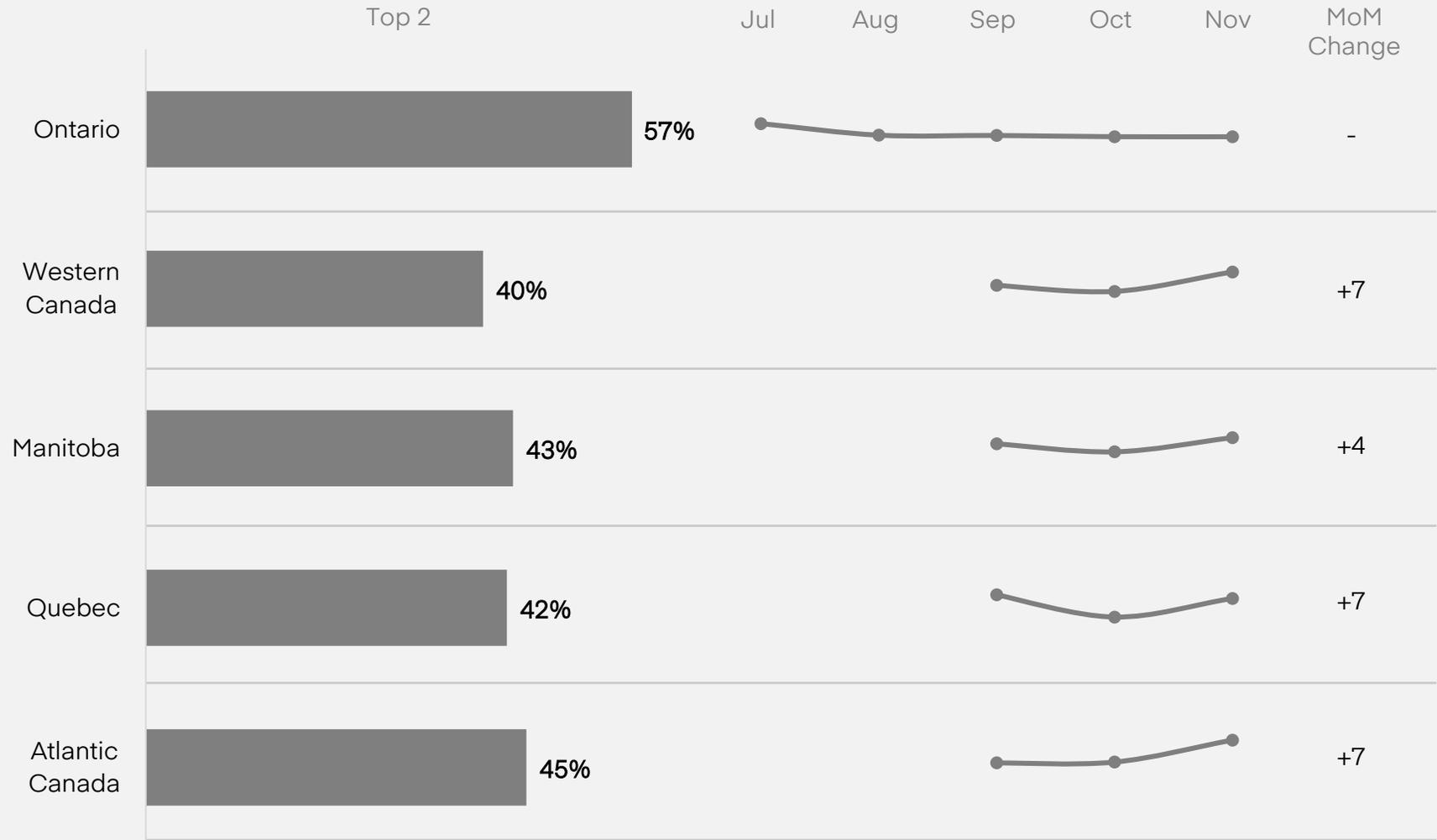|	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	70%						+3
Western Canada	47%						+4
Manitoba	51%						-4
Quebec	52%						+5
Atlantic Canada	54%						+4

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=1,475)

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ONTARIO TRAVEL LIKELIHOOD: IMPACT OF GLOBAL INSTABILITY

Close to three in five Ontario travellers are influenced by global instability and conflicts to choose travel within the province, while more than 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 travellers across Canadian regions outside Ontario, as these markets show increases compared to the previous month.

	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	57%						-
Western Canada	40%						+7
Manitoba	43%						+4
Quebec	42%						+7
Atlantic Canada	45%						+7

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=1,475)

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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
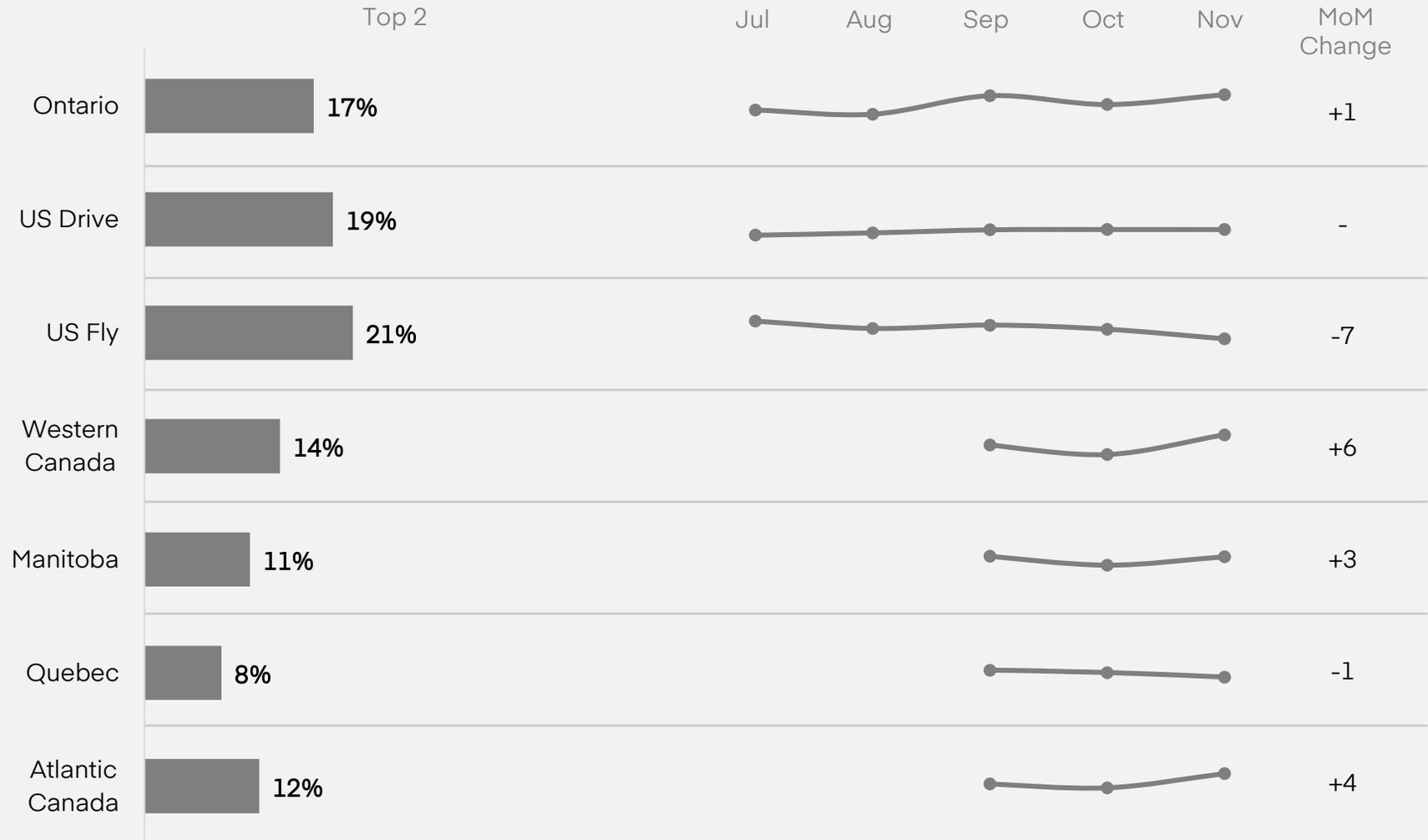
Weather Conditions   Sustainability   Impact on Travel Plans

⚲ **Niagara**

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.

Compared to the previous month, Western Canada travellers show a significant increase (+6) in agreeing that the lack of snow is affecting their travel plans.

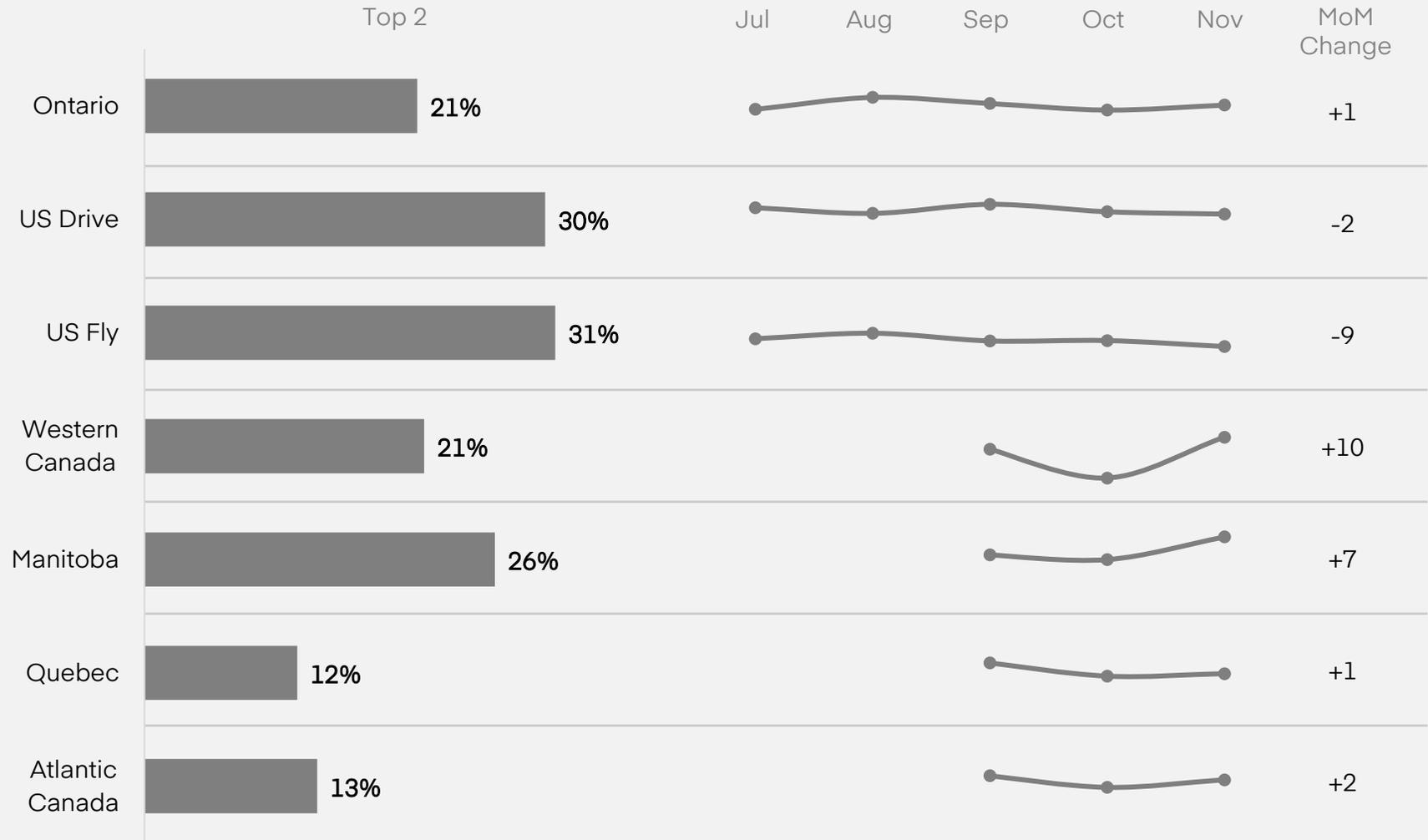|	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	17%						+1
US Drive	19%						-
US Fly	21%						-7
Western Canada	14%						+6
Manitoba	11%						+3
Quebec	8%						-1
Atlantic Canada	12%						+4

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=1,947)

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WILDFIRES IMPACT ON ONTARIO TRAVEL

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

Agreement has increased among Manitoba travellers (+7) and risen significantly in Western Canada (+10), where higher fire activity persists, with most fires now under control or being monitored.

Travellers from the U.S. market, however, show a decrease in agreement (-9) compared to the previous month.

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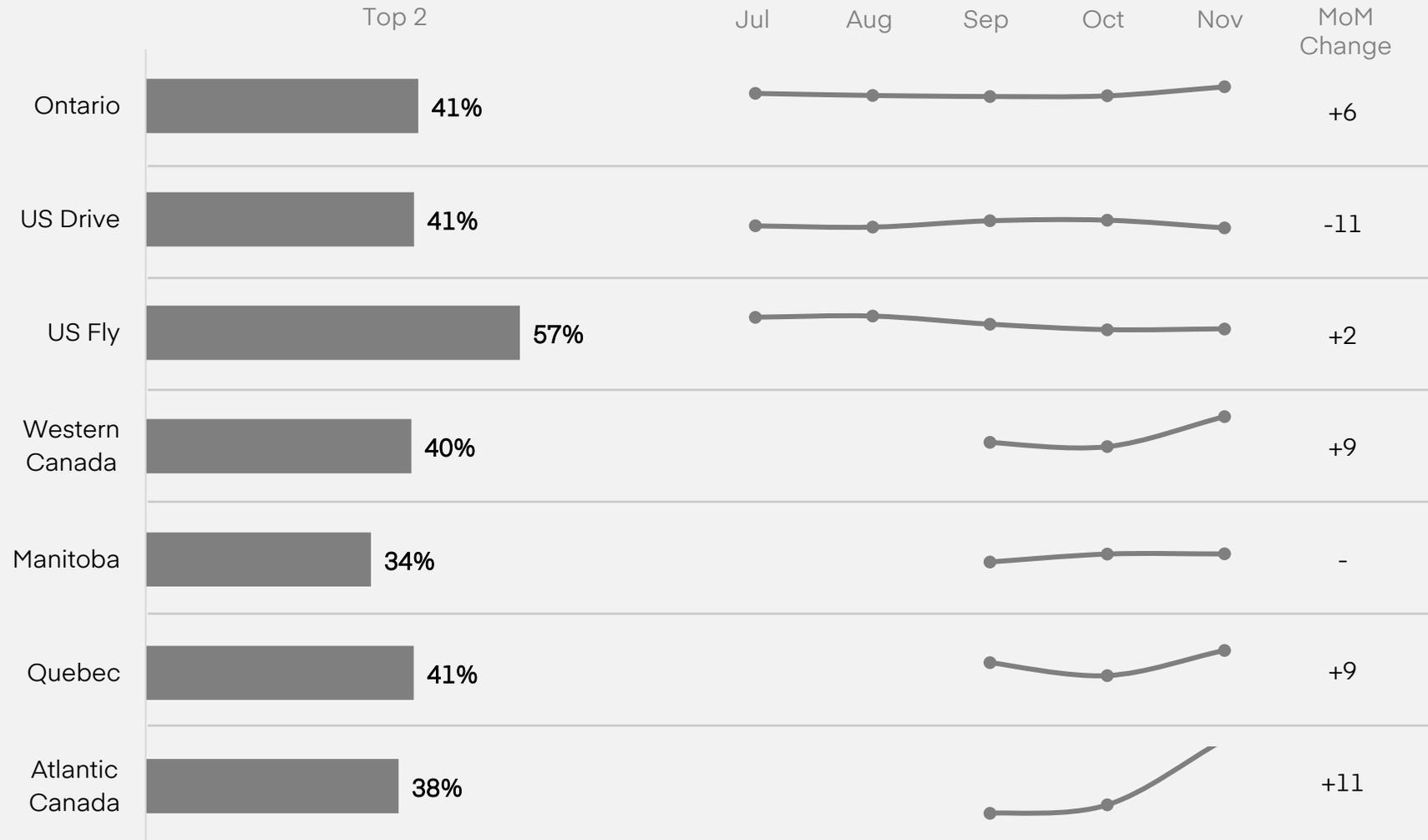|	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	21%						+1
US Drive	30%						-2
US Fly	31%						-9
Western Canada	21%						+10
Manitoba	26%						+7
Quebec	12%						+1
Atlantic Canada	13%						+2

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=1,947)

42

PRIORITIZING SUSTAINABLE TOURISM

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

Interest in sustainable tourism has grown compared to the previous month, with Ontario (+6), Western Canada (+9), Quebec (+9), and Atlantic Canada (+11) all showing significant increases.

In contrast, U.S. Drive travellers report a significant decrease in prioritizing sustainable tourism, though their levels remain similar to other markets.

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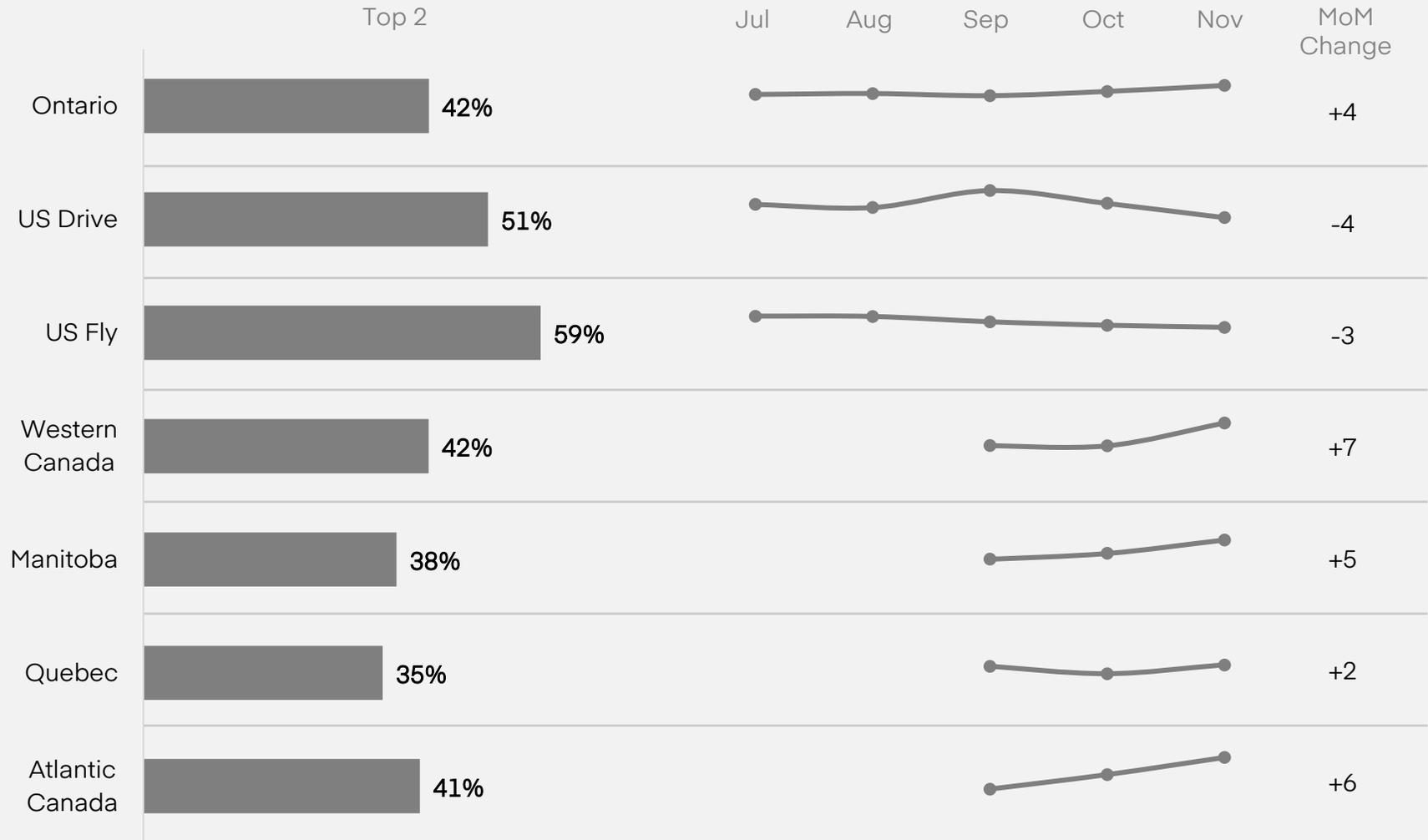|	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	41%						+6
US Drive	41%						-11
US Fly	57%						+2
Western Canada	40%						+9
Manitoba	34%						-
Quebec	41%						+9
Atlantic Canada	38%						+11

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=1,923)

43

PAYING EXTRA FOR SUSTAINABLE TRAVEL

U.S. travellers are more likely than Canadian travellers to agree that they would 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, narrowing the gap as U.S. markets show a slight decline over the past few months.

|	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	42%						+4
US Drive	51%						-4
US Fly	59%						-3
Western Canada	42%						+7
Manitoba	38%						+5
Quebec	35%						+2
Atlantic Canada	41%						+6

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=1,923)

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
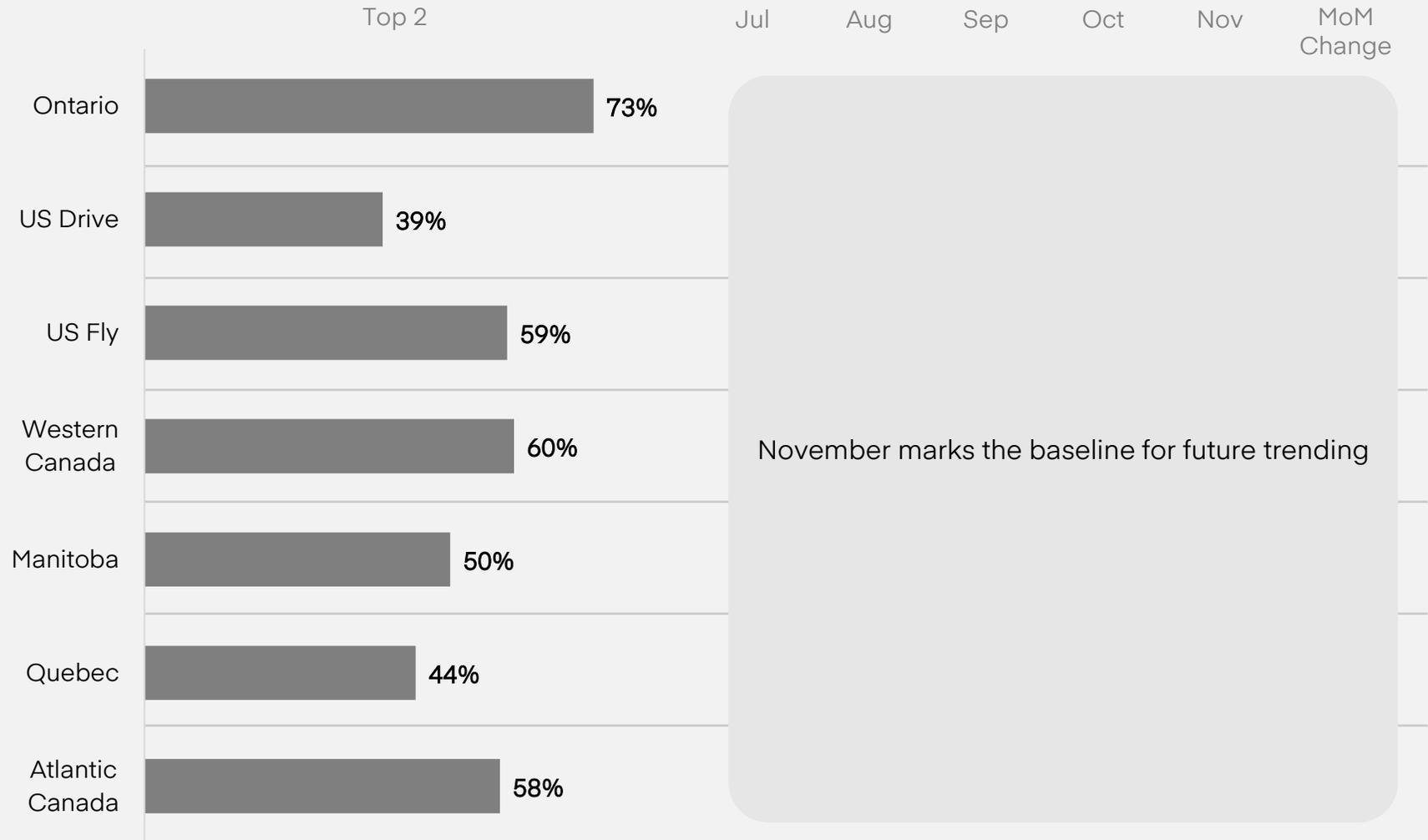
FIFA 2026
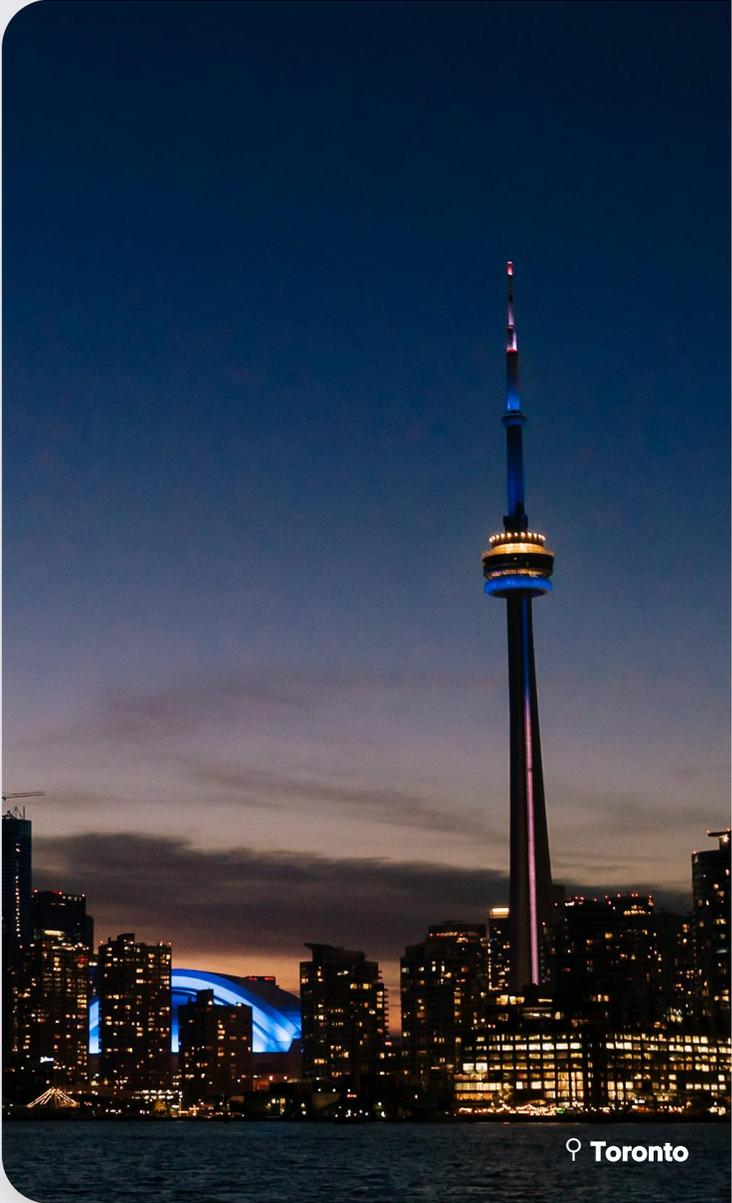
Toronto

AWARENESS OF TORONTO AS HOST CITY

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

Awareness remains generally positive across markets, though it tapers among U.S. Drive and Quebec travellers.
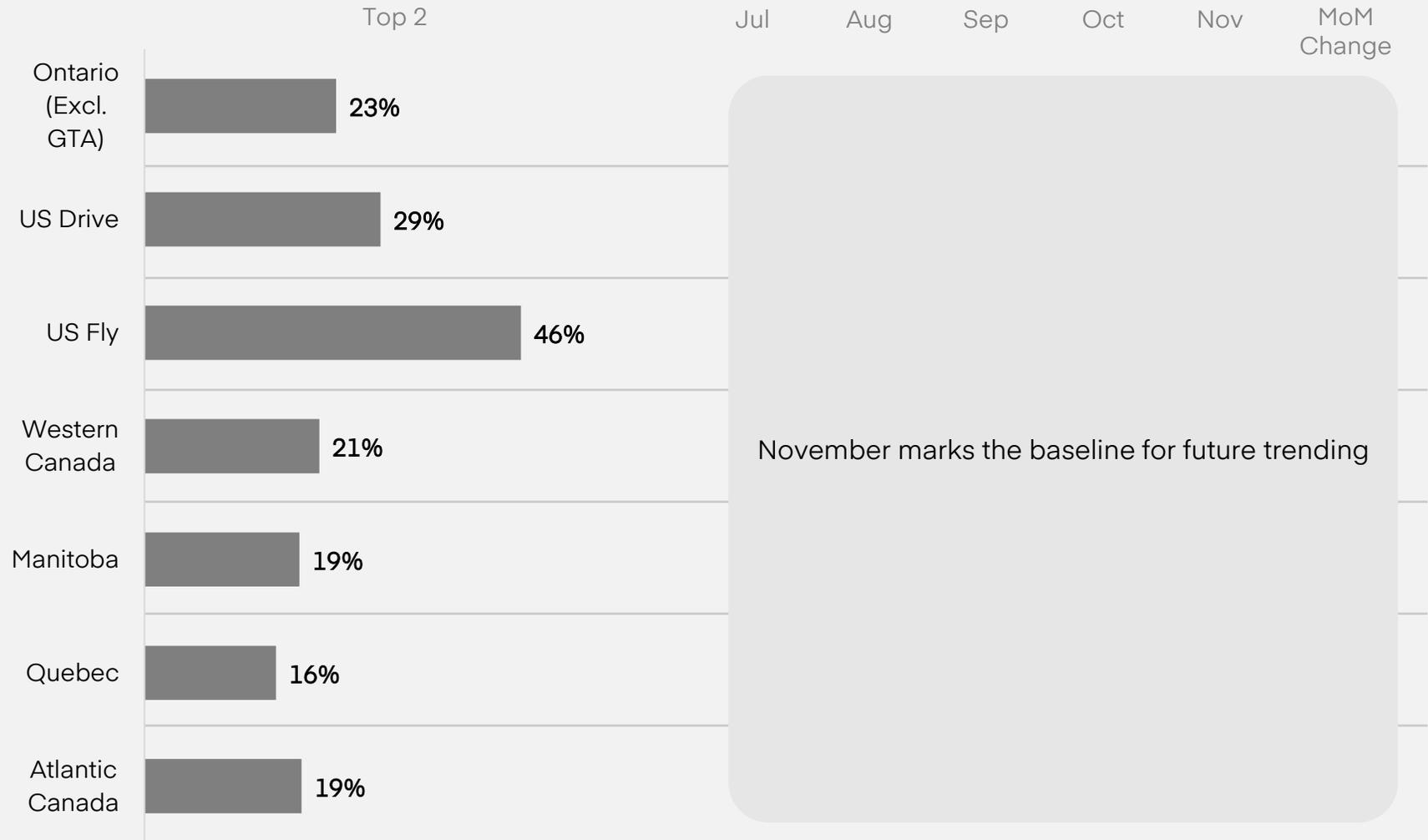
	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change
Ontario	73%						
US Drive	39%						
US Fly	59%						
Western Canada	60%						
Manitoba	50%						
Quebec	44%						
Atlantic Canada	58%						

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=1,962)

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VISITING TORONTO DUE TO FIFA WORLD CUP 2026

U.S. Fly travellers are noticeably more inclined 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	MoM Change
Ontario (Excl. GTA)	23%						
US Drive	29%						
US Fly	46%						
Western Canada	21%						
Manitoba	19%						
Quebec	16%						
Atlantic Canada	19%						

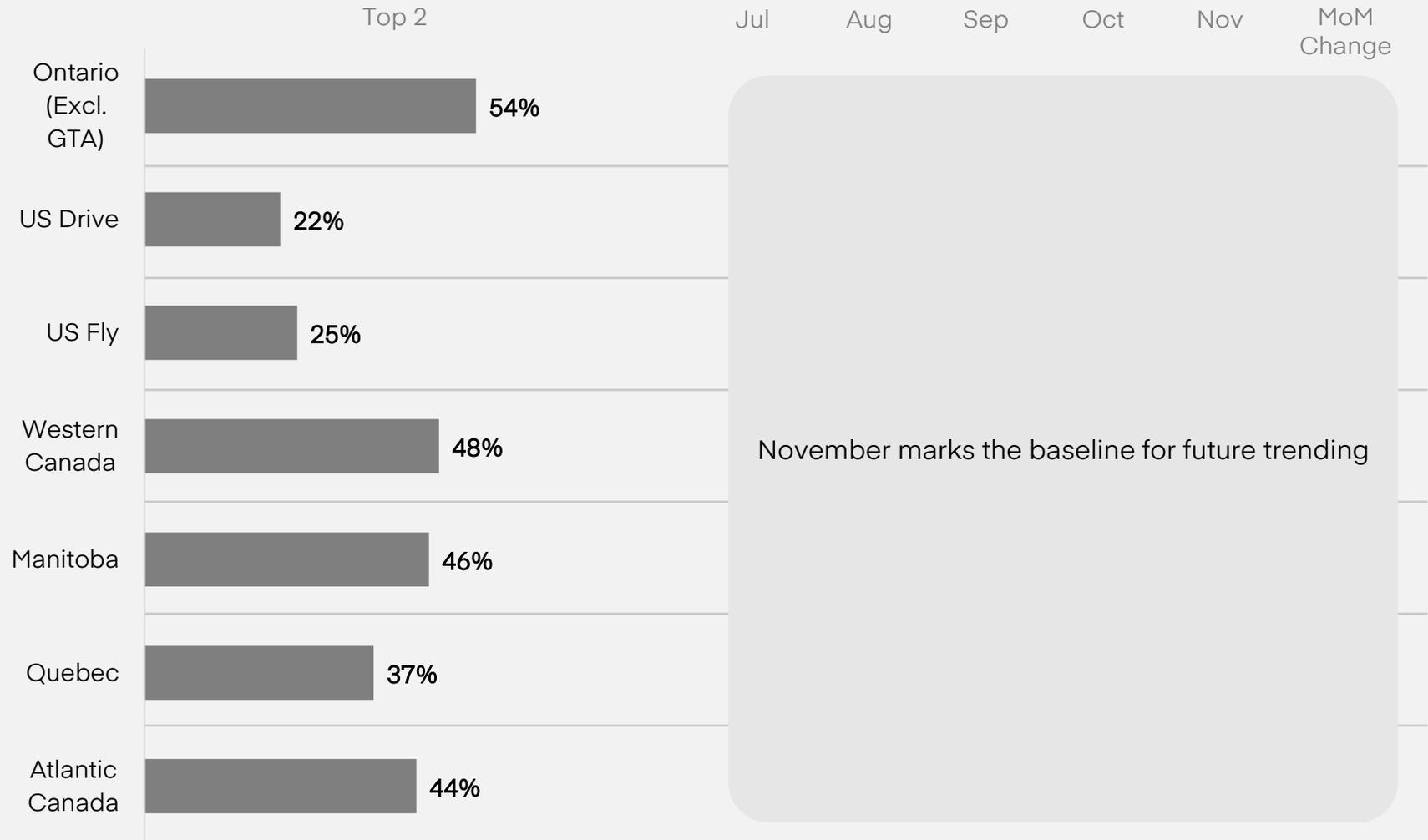November marks the baseline for future trending

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=1,769)

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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, only a quarter of U.S. travellers stated they would avoid Toronto.

	Top 2	Jul	Aug	Sep	Oct	Nov	MoM Change

- Ontario (Excl. GTA): 54%
- US Drive: 22%
- US Fly: 25%
- Western Canada: 48%
- Manitoba: 46%
- Quebec: 37%
- Atlantic Canada: 44%

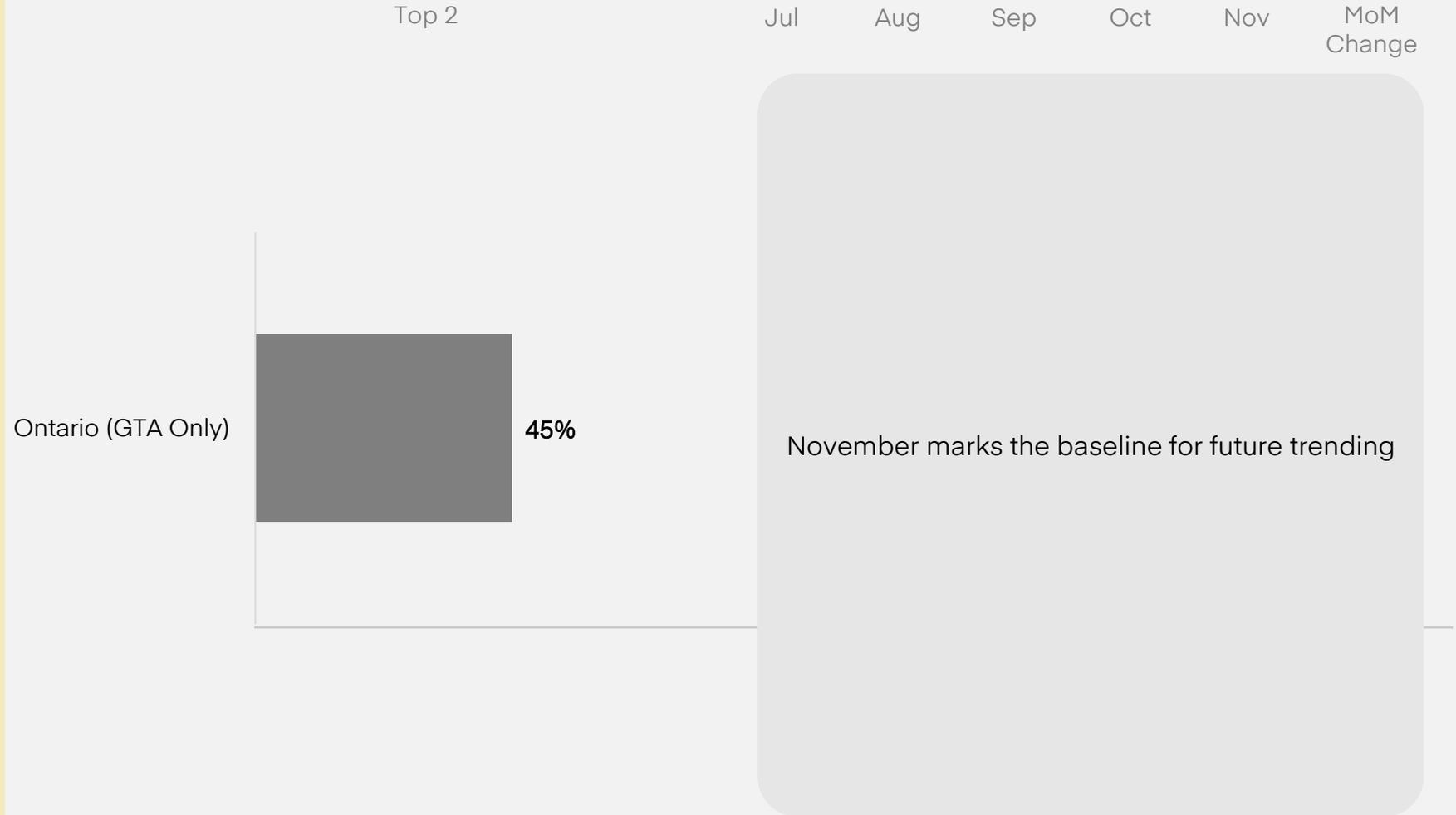November marks the baseline for future trending

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=1,734)

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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	MoM Change

Ontario (GTA Only) ▮ **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=207)

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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	MoM Change

Ontario (GTA Only)   38%

November marks the baseline for future trending

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=205)

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