



CONTEXT IS EVERYTHING

EUROPE TRAVELLER SURVEY

Prepared for: Destination Ontario
June 6th, 2025


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KEY OBJECTIVES

 Greater Toronto Area (RTO5)

Overview:


CRG worked collaboratively with Destination Ontario (DO) and Destination Toronto (DT) to undertake a pulse study among travellers in key European markets: the United Kingdom (UK), Germany, and France. The goal of the study was to evaluate perceptions of and attitudes towards Canada, Ontario and Toronto among leisure travellers in the current economic and political environment, with a particular focus on how Canada is distinguished from the United States.

Objectives:

The objectives of this survey are to evaluate:

- Impact of recent global economic and political events on perceptions
- Degree to which travellers distinguish Canada from the United States
- Key obstacles preventing travel to Canada, Ontario and Toronto from the UK, Germany, and France
- Strategic opportunities for Destination Ontario to adapt its marketing based on evolving traveller perceptions and preferences

KEY OBJECTIVES

 Greater Toronto Area (RTO5)

Methodology:

- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:

- United Kingdom, France or Germany resident
- 25 to 64 years of age
- Have travelled for leisure and stayed in a paid accommodation for at least one night in the past 5 years or planning to take one in the next 2 years
- Categorized as Outdoor Explorer, Refined Globetrotter, Culture Seeker, or City Tripper

Sample Size:

- n=1560

Country:

- UK: 541 (35%)
- France: 529 (34%)
- Germany: 490 (31%)

Segment:

In all markets, respondents were categorized into one of four segments: Outdoor Explorer, Refined Globetrotter, Culture Seeker, or City Tripper.

Fieldwork Date:

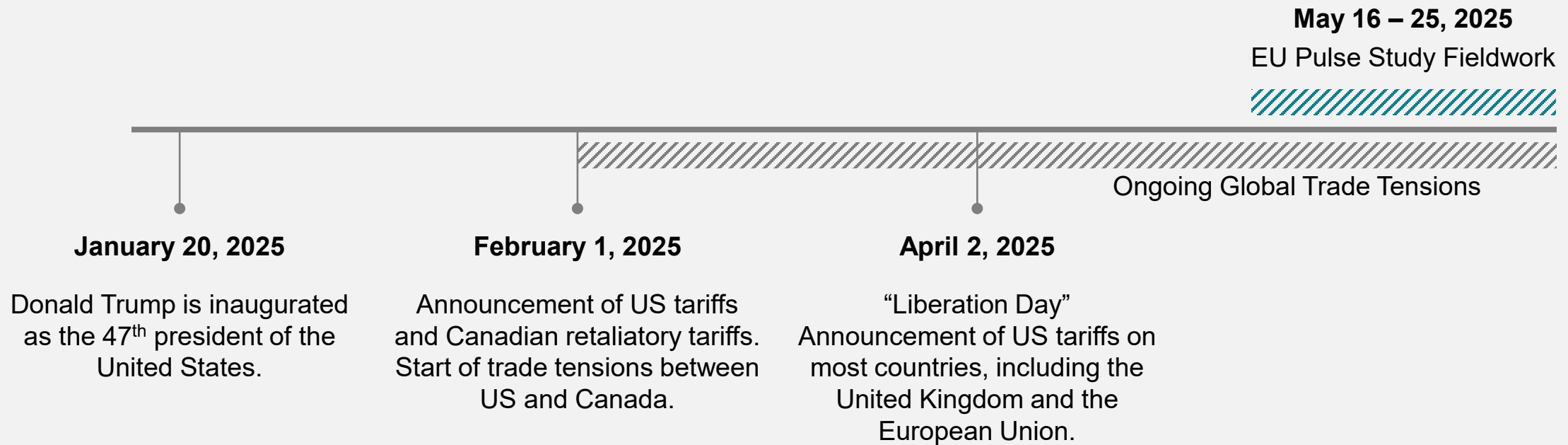
- May 16th, 2025 – May 26th, 2025

Average Length of Interview:

- 15.2 minutes

CONTEXTUAL TIMELINE

Greater Toronto Area (RTO5)



LEVEL OF AWARENESS OF CANADA

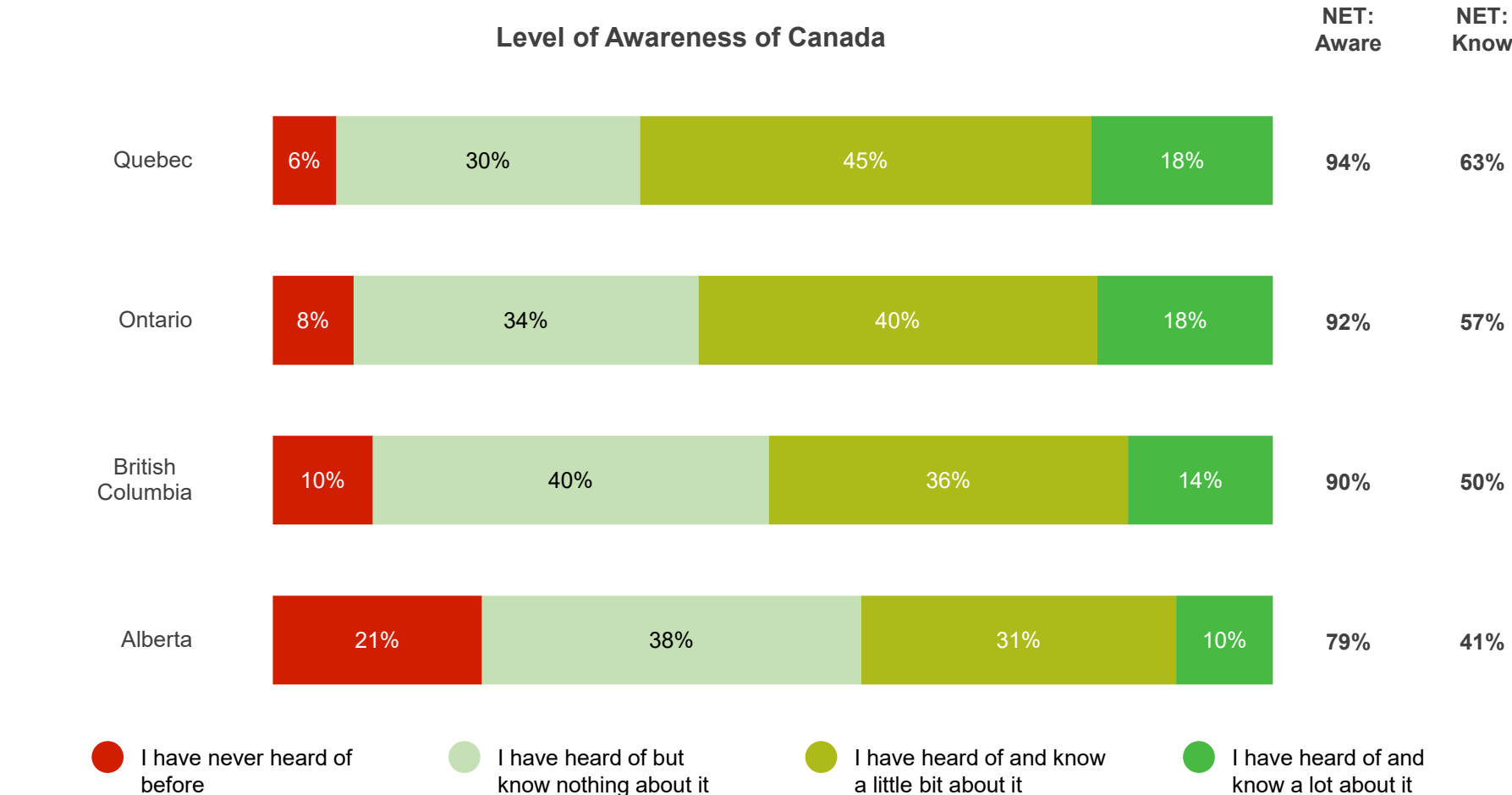
Awareness of Quebec, Ontario, and British Columbia is high among European travellers, with nine in ten having heard of these provinces.

Six in ten (57%) are familiar with Ontario, providing a strong foundation for converting awareness into intent to visit.

UK travellers are more likely to know of Ontario (67%), while French travellers are the least likely (44%) and show stronger familiarity with Quebec.

This highlights the need to boost Ontario’s visibility in France and differentiate it from Quebec.

Among segments, Culture Seekers are more likely to know about Ontario (66%), pointing to an opportunity to better promote Ontario’s urban and cultural offerings.



P0. We'd like to first understand your general level of awareness of Canada. How would you best describe your awareness of the following Canadian provinces? (Excludes "Don't know")
All respondents. n=1560

COUNTRIES AS PLEASURE TRAVEL DESTINATIONS

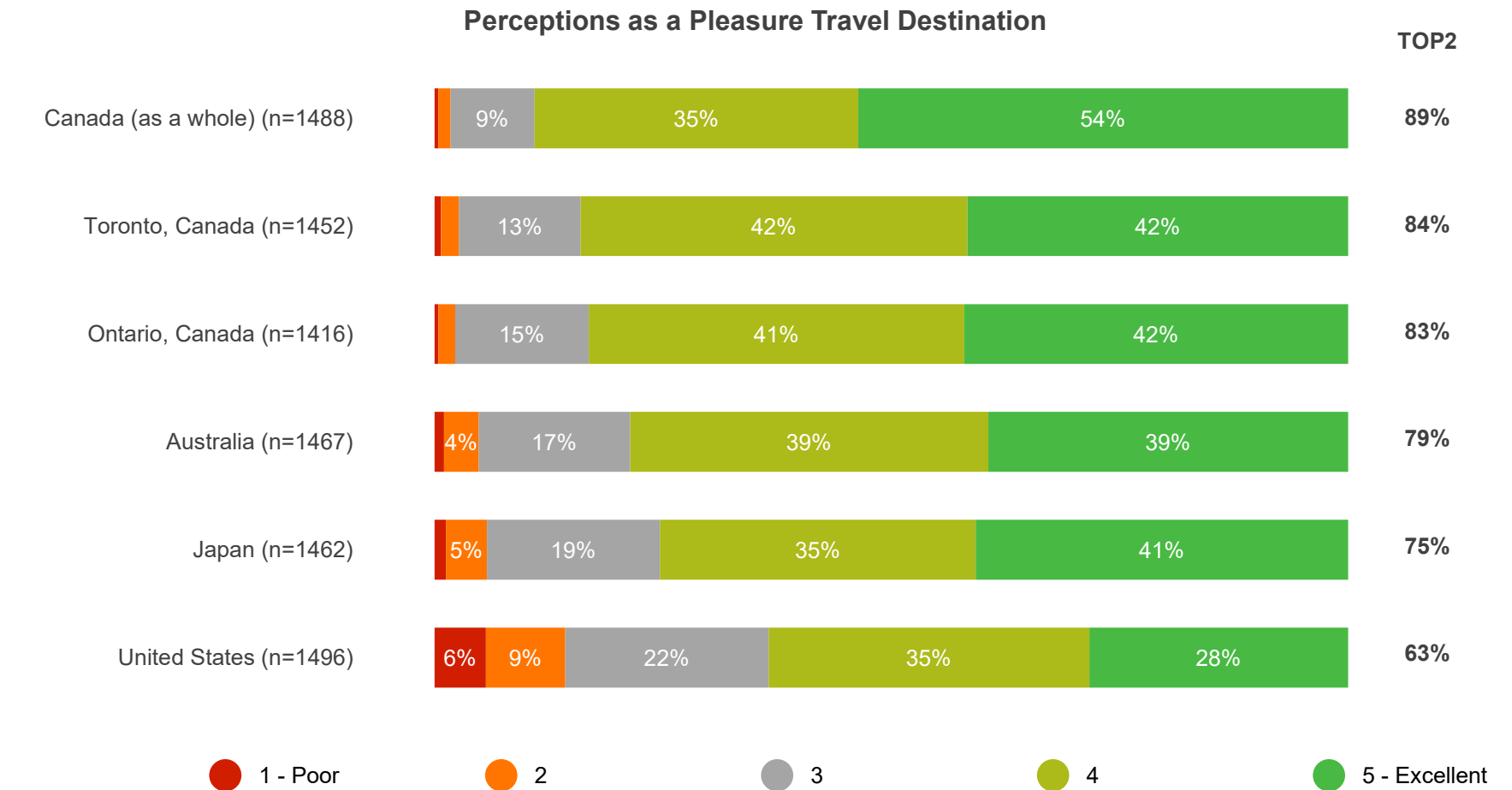
Canada, Ontario, and Toronto hold strong appeal as leisure travel destinations among the European market, with at least four in five respondents expressing positive interest.

Notably, Ontario and Toronto outperform leading long-haul destinations like Australia and Japan.

By comparison, only three in five view the United States positively as a leisure destination.

Moreover, Outdoor Explorers are most likely to rate Canada positively as a pleasure travel destination.

This strong appeal positions Ontario as a top choice for Europeans and offers a strategic opportunity to differentiate from the US. Ontario can capitalize by reinforcing its uniquely Canadian, welcoming character, especially for outdoor enthusiasts.



P1. Overall, how would you rate the following as leisure travel destinations? (On a scale of 1 to 5 where 1 is "poor" and 5 is "excellent".) (5-point scale)
(Excludes "don't know")
All respondents.

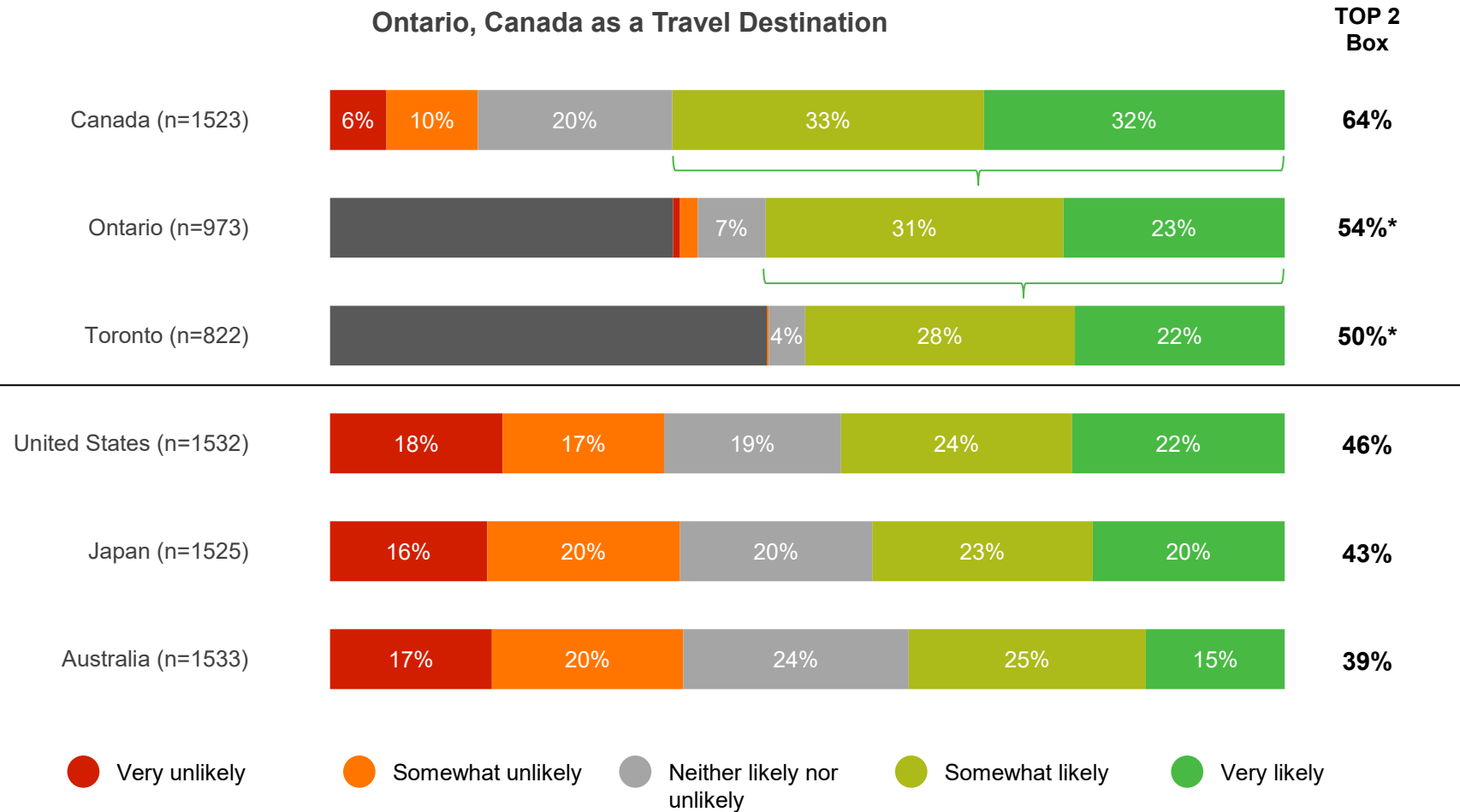
In the next two years, nearly two in three (64%) are likely to take a leisure trip to Canada, with 54% considering Ontario and 50% Toronto.

In contrast, less than half express interest in visiting the US, Japan or Australia.

Among the three markets, UK travellers are the most likely to take a trip to Toronto.

By segment, Outdoor Explorers show the highest likelihood of visiting Ontario (62%) or Toronto (57%), particularly those from the UK.

*Based on all respondents.



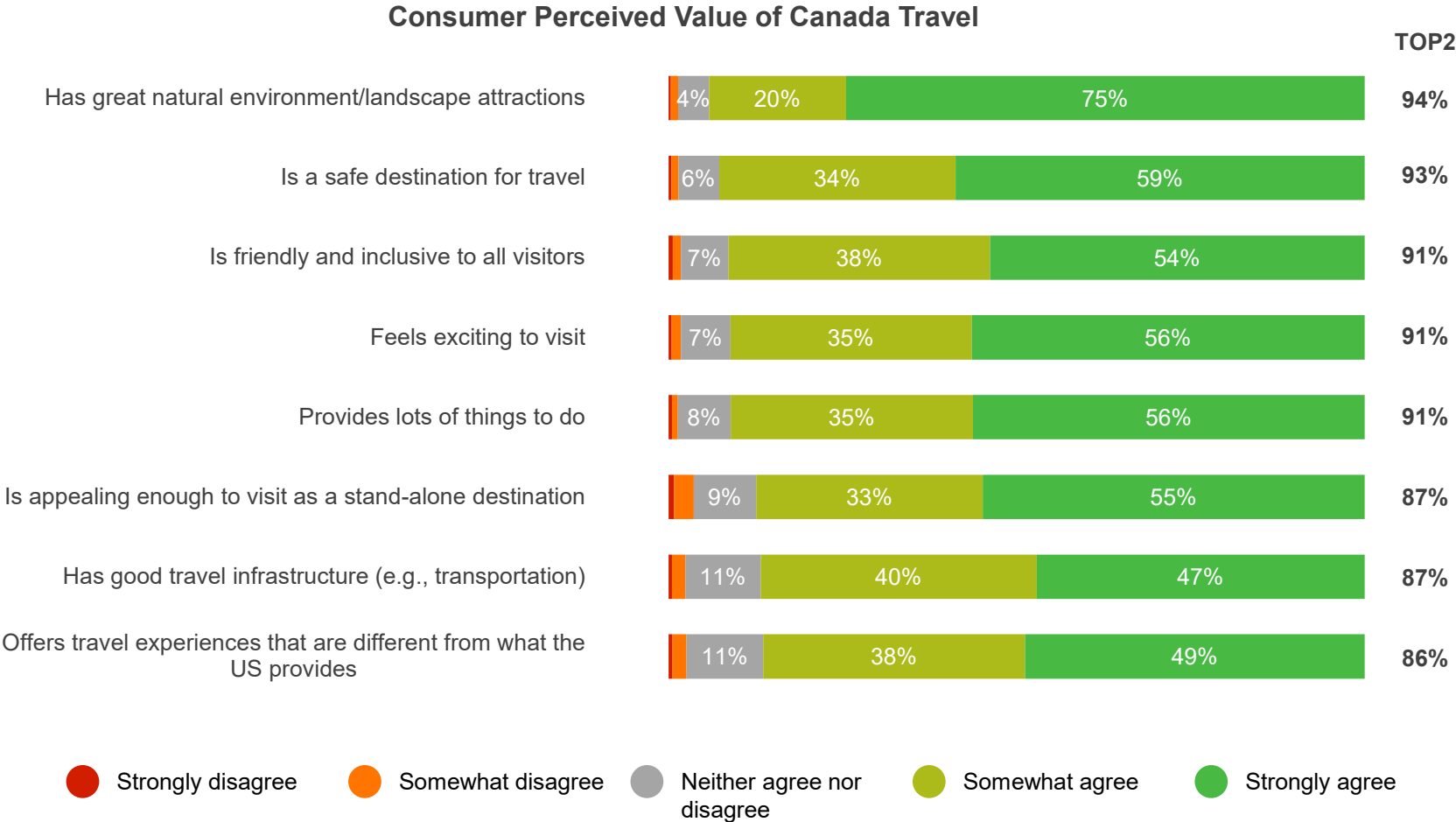
P2. How likely are you to take a leisure trip to the following destinations in the next 2 years? /P2B. How likely are you to take a leisure trip to Ontario, Canada in the next 2 years? / P2C. How likely are you to take a leisure trip to Toronto, Canada in the next 2 years? (5-point scale) (Excludes “don’t know”)
P2. All respondents./ P2B. Respondents who were likely to travel to Canada./ P2C. Respondents who were likely to travel to Ontario.

CONSUMER PERCEIVED VALUE OF CANADA TRAVEL

Canada performs strongly on perceptions that it offers beautiful natural environments, is a safe destination, is friendly and inclusive to all, feels exciting to visit, and offers plenty of things to do, with nine in ten agreeing.

Nearly nine in ten also say that Canada is appealing enough to visit as a stand-alone destination, has strong travel infrastructure, and offers travel experiences that are distinct from those in the US.

These perceptions are rated highly across all three European markets.

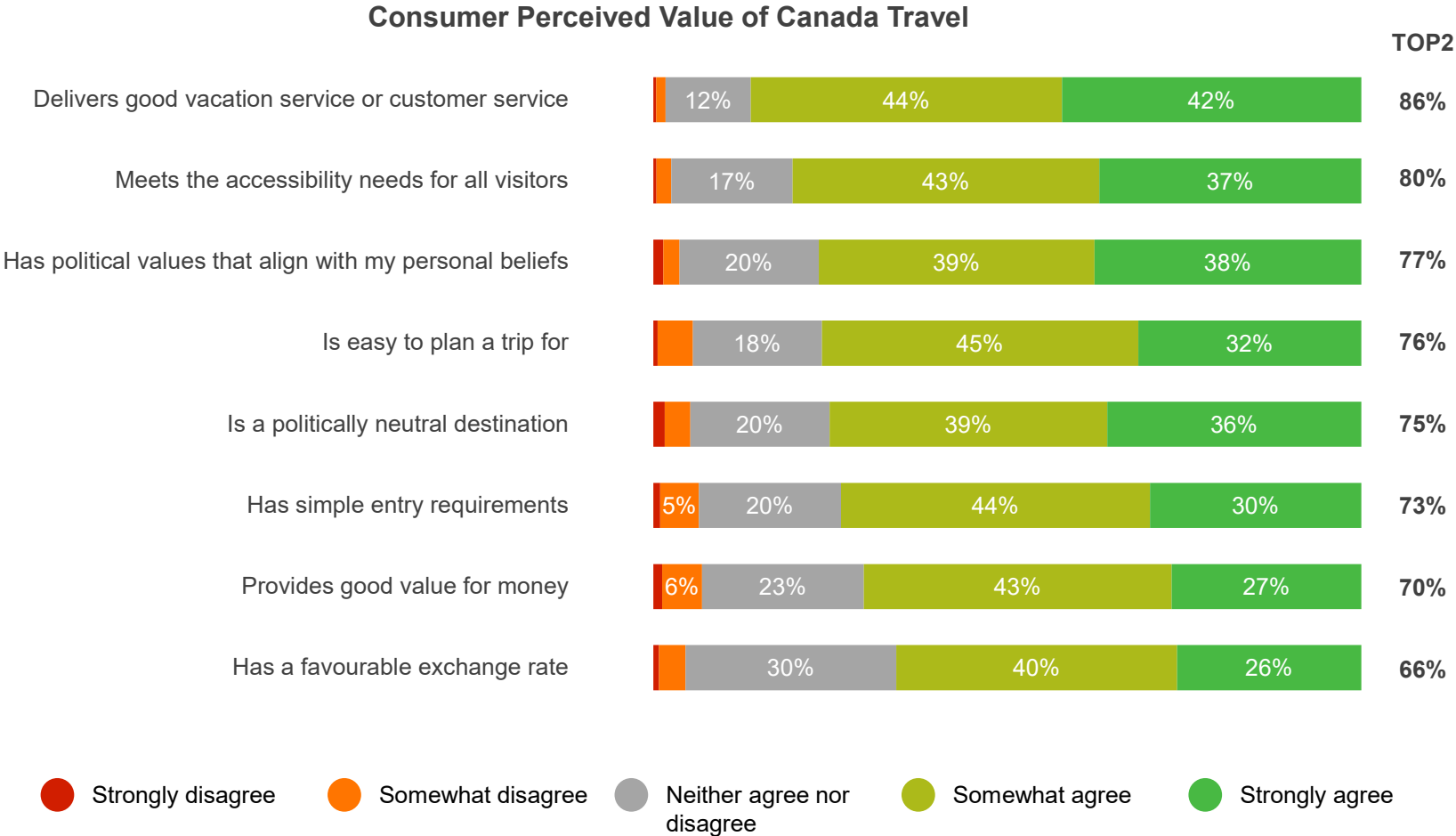


RP3. Thinking only about Canada as a travel destination, how much do you agree or disagree that Canada...? (Excludes “don’t know”) (5-point scale)
All respondents.

CONSUMER PERCEIVED VALUE OF CANADA TRAVEL (CONTINUED)

However, Canada scores lower on perceptions of offering a favourable exchange rate and good value for money. This perception is lowest among the French respondents.

Canada is widely appealing to travellers, but concerns about cost and value may be barriers, especially in France. Messaging that emphasizes unique experiences and trip worthiness could help offset price sensitivity.



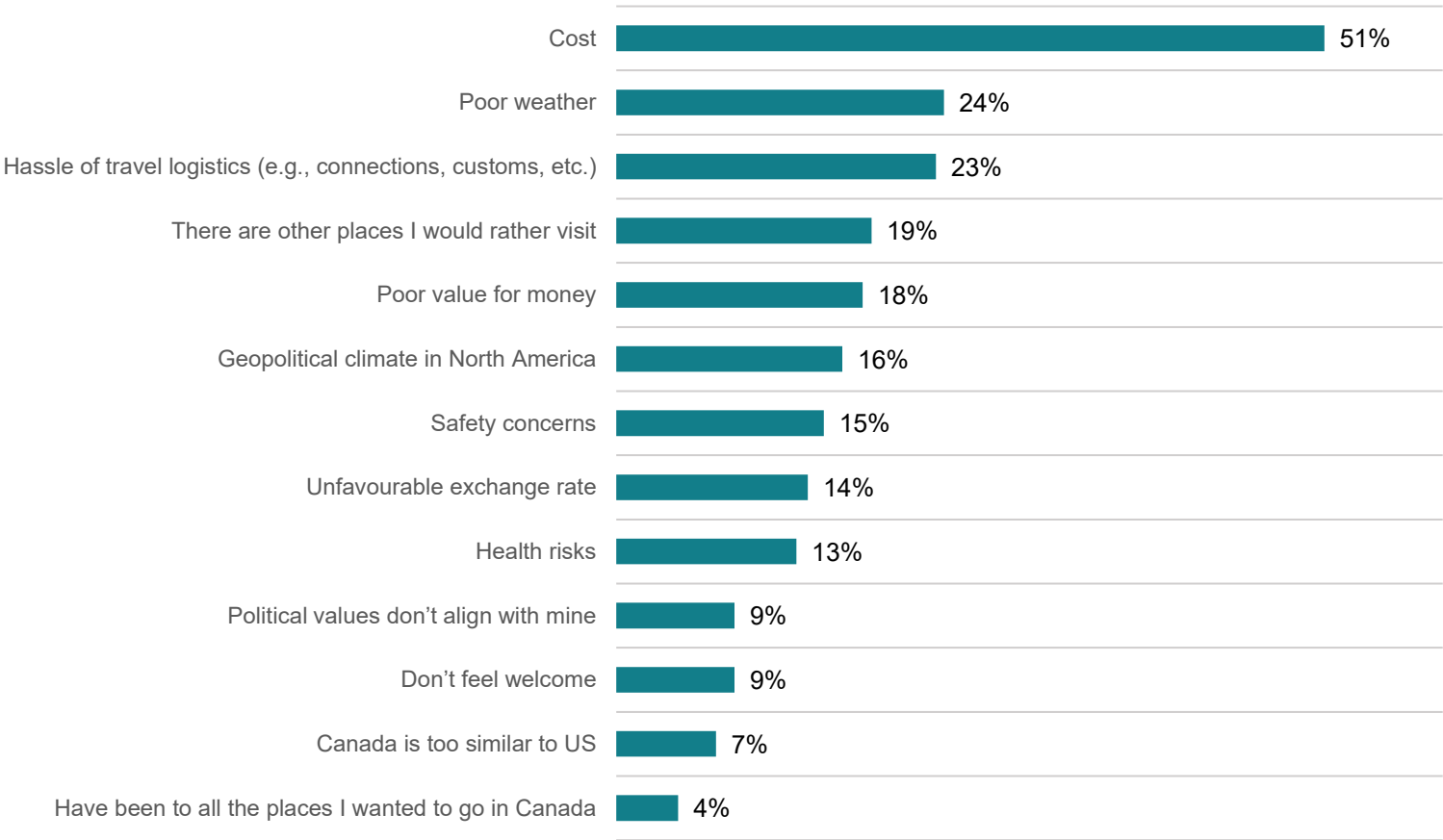
RP3. Thinking only about Canada as a travel destination, how much do you agree or disagree that Canada...? (Excludes “don’t know”) (5-point scale)
All respondents.

TOP RANKED BARRIERS TO VISIT CANADA

Cost is the top reason discouraging respondents from visiting Ontario, cited by half of them.

Additionally, one in four respondents mentioned poor weather and the hassle of travel logistics as further deterrents to visiting Canada.

Barriers to Visit Canada



B1. Which of the following factors might discourage you from visiting Canada? (Select all that apply)
All respondents. n=1560

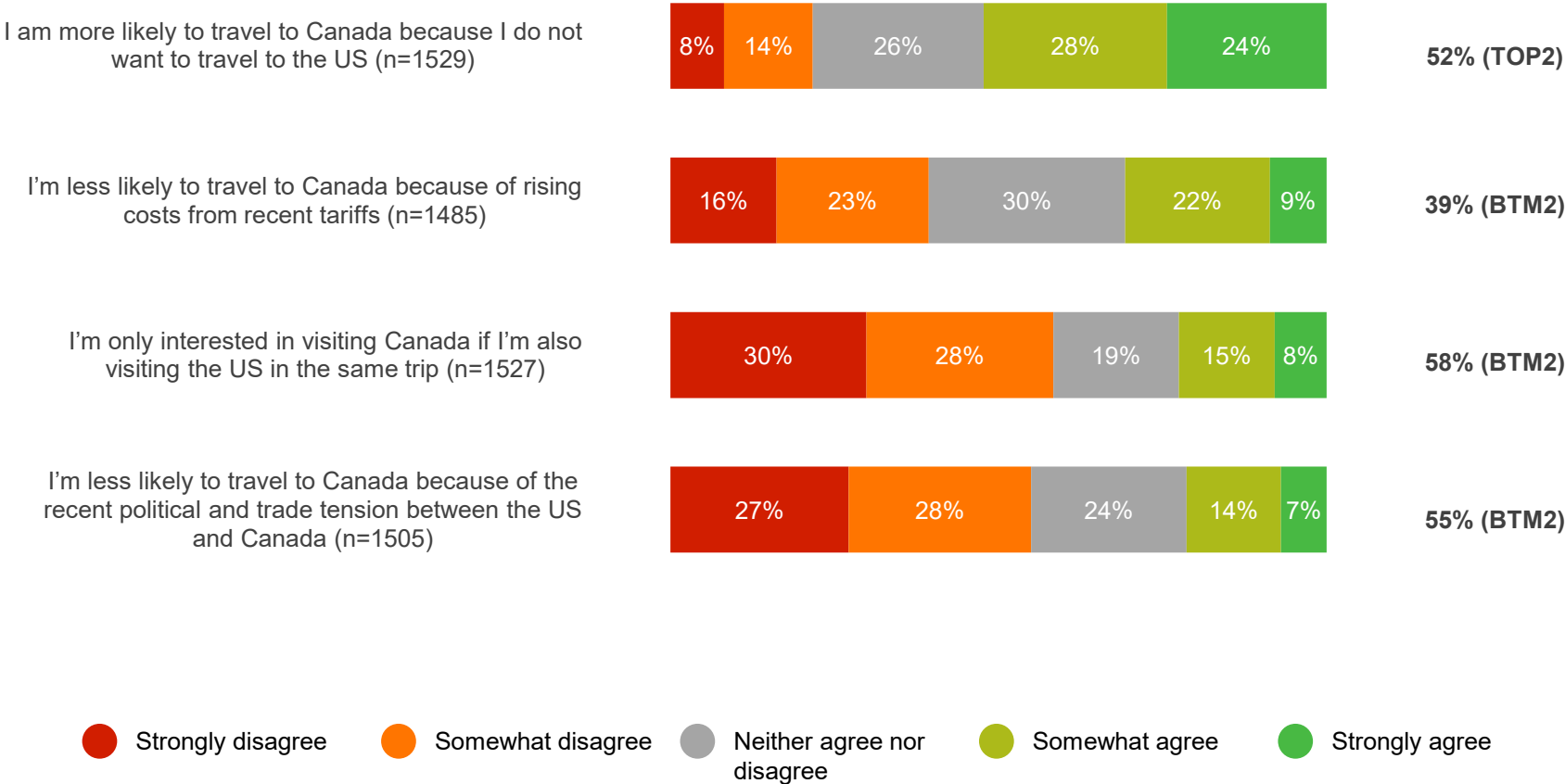
Results suggest that geopolitical and economic factors have a mixed influence on travel intentions to Canada.

Half of respondents agree they are more likely to travel to Canada because they don't want to travel to the US, indicating a potential advantage for Canada amid shifting US perceptions.

Fewer respondents say that they would only visit Canada if also visiting the US (23%) or are hindered by US-Canada tension (21%), suggesting these factors are less influential in shaping travel decisions overall.

Concerns around rising costs appear less significant, with opinions split evenly among those who agree, disagree, or remain neutral.

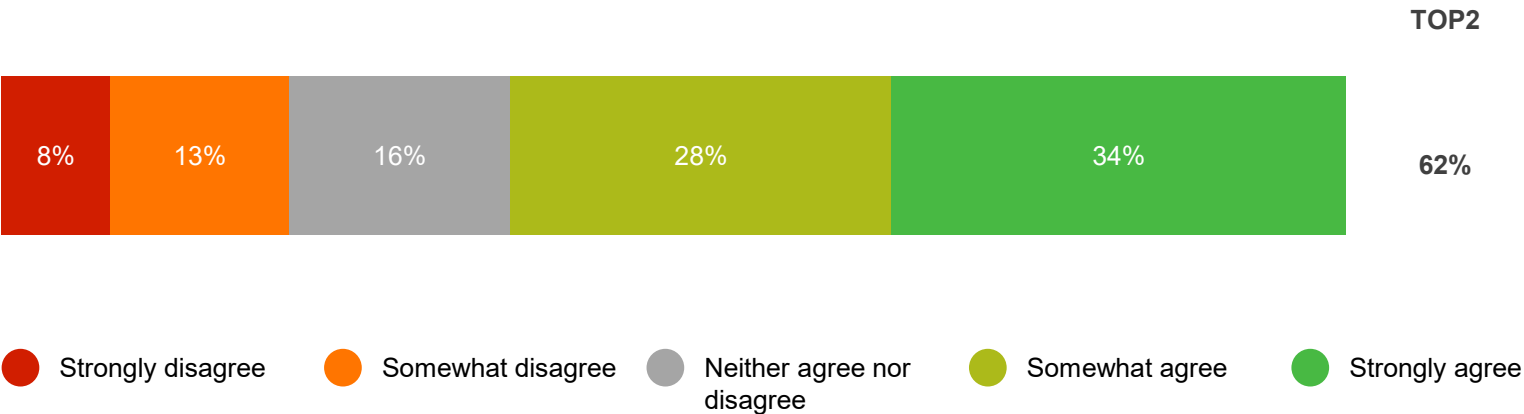
US Influence on Visiting Canada



B2.How much do you agree or disagree with the following statements? (5-point scale) (Excludes “don’t know”) All respondents.

Two in three respondents agree that the current political climate in the US makes them less likely to want to travel to the US.

“The current political climate in the US makes me less likely to want to travel to the US.”



B3. How much do you agree or disagree with the following statement? “The current political climate in the US makes me less likely to want to travel to the US.” (5-point scale) (Excludes “don’t know”) All respondents.

The majority (75%) agree that they feel a sense of solidarity with Canada because both Europe and Canada have been affected by recent US tariffs.

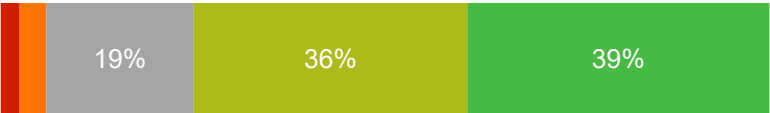
In addition, opinions on reducing travel spending due to the current economic climate are evenly split among those who agree, disagree, or remain neutral.

Across all segments, Culture Seekers are the most likely to express solidarity with Canada, with 83% agreeing with the statement.

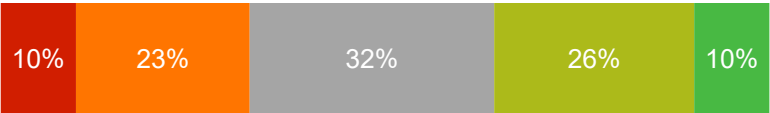
Perception of US Tariffs

TOP2

I feel a sense of solidarity with Canada because both Europe and Canada have been affected by recent US tariffs. (n=1509)



I'm spending less on travel because of the current economic climate. (n=1531)



● Strongly disagree ● Somewhat disagree ● Neither agree nor disagree ● Somewhat agree ● Strongly agree

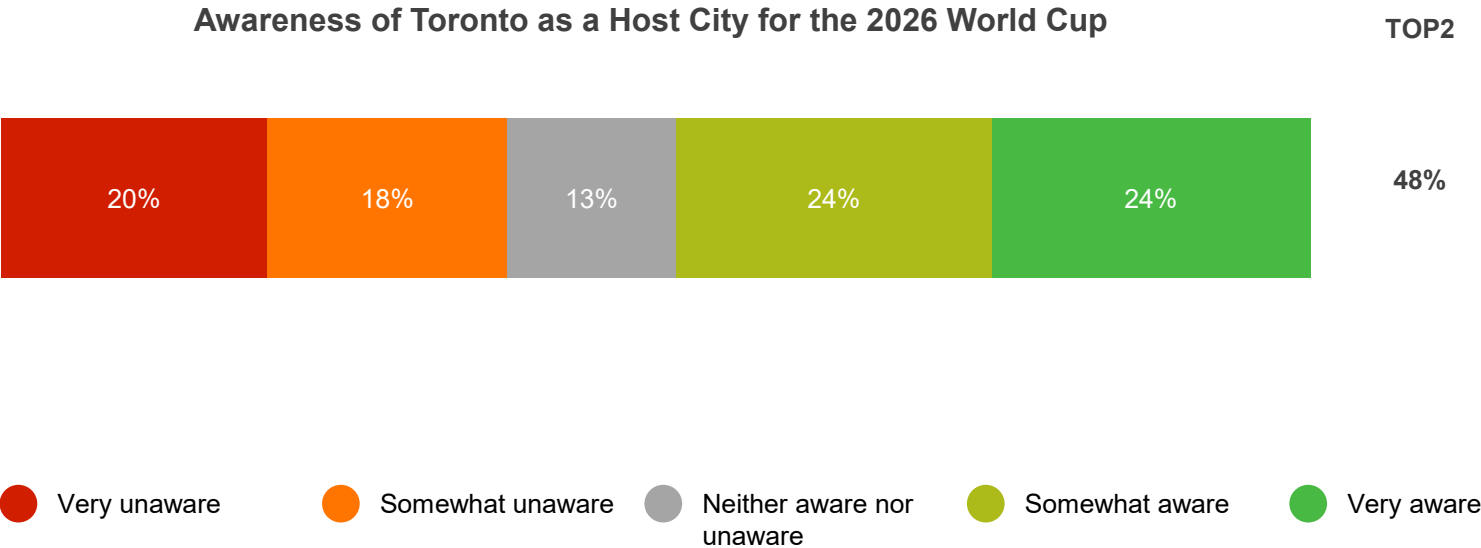
11. Recently, the United States introduced tariffs that have impacted both Europe and Canada. How much do you agree or disagree with the following statements? (5-point scale) (Excludes “don’t know”) All respondents.

Less than half of respondents are aware that Toronto is one of the host cities for the 2026 World Cup.

Among the three markets, French respondents are the least aware, with only 37% indicating awareness. Within France, Outdoor Explorers (33%) show particularly low awareness.

In contrast, Refined Globetrotters from Germany are the most likely segment to be aware of the event.

These findings highlight uneven awareness across markets and segments, suggesting a need for focused marketing efforts to close the gaps and maximize potential visitation around the event.



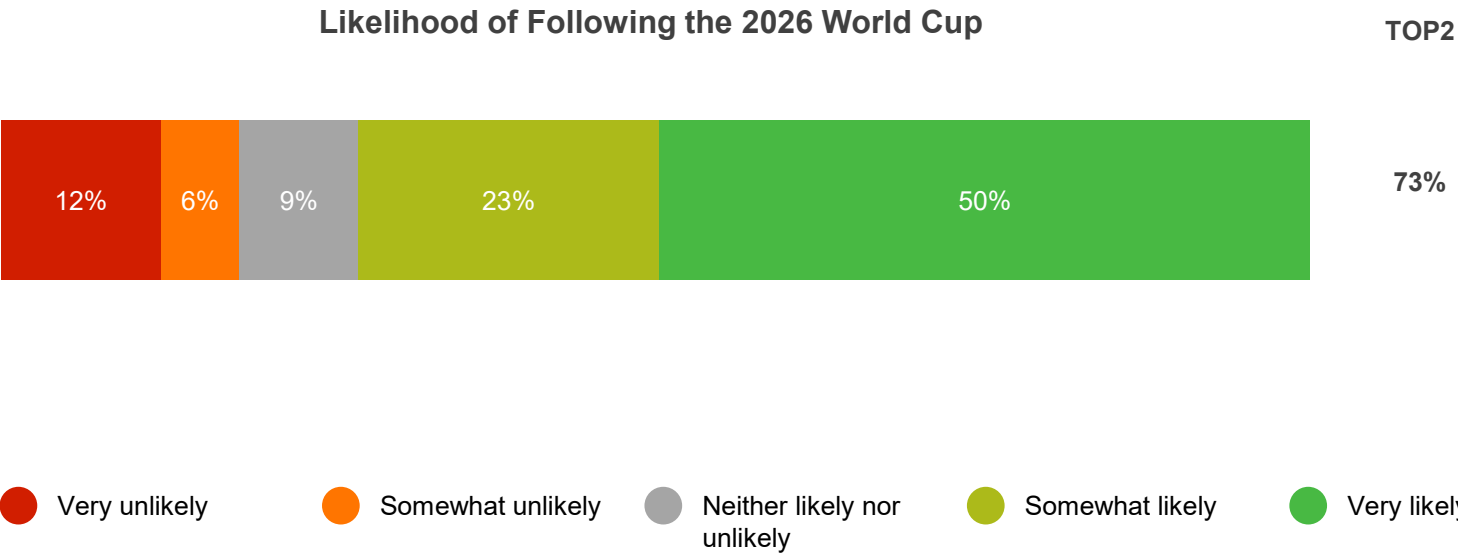
F1. How aware are you that Toronto, Canada is one of the official host cities for the FIFA 2026 World Cup? (5-point scale) (Excludes “don’t know”) All respondents. n=1481

The majority of respondents show interest in following the 2026 World Cup, with around three in four indicating interest.

German respondents (79%) are the most engaged, while those from France (62%) are the least likely to follow.

Refined Globetrotters show varying levels of interest depending on the market. Those from Germany are the most enthusiastic, with 87% indicating they will follow the event, compared to just 62% of their counterparts in France.

This highlights a need for stronger promotional efforts in France, while Germany presents a strong opportunity for activation.

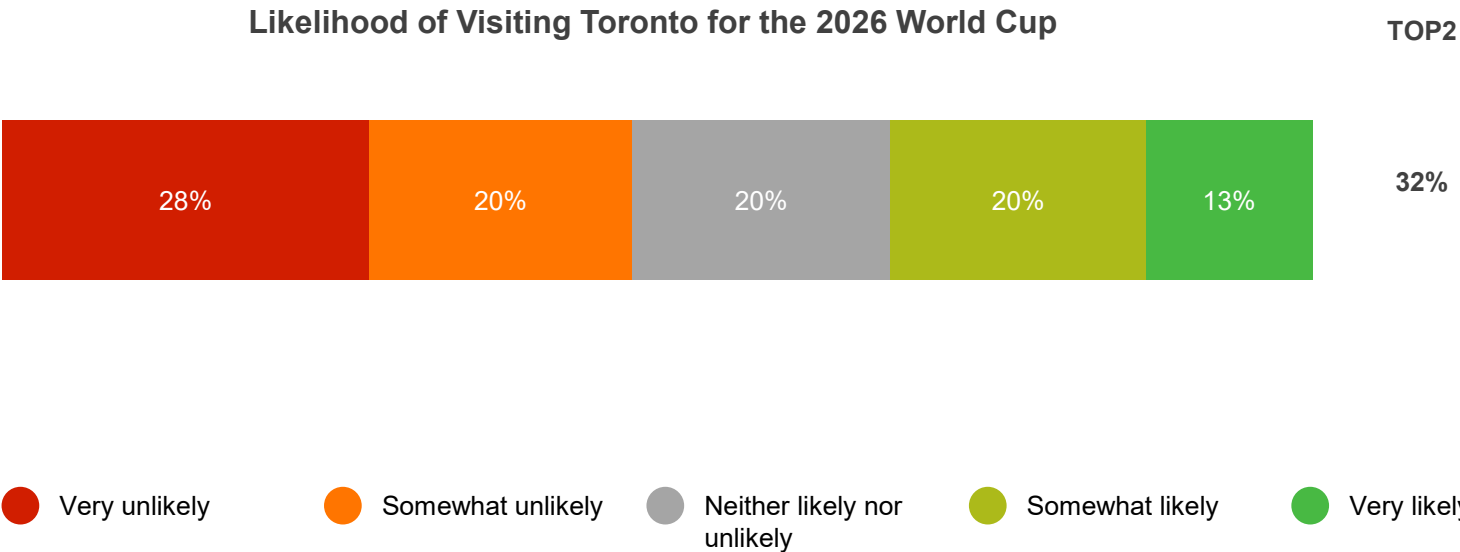


F1B. How likely are you to follow the FIFA 2026 World Cup (e.g., watching on TV, online) (5-point scale) (Excludes “don’t know”)
All respondents. n=1550

A third of respondents express interest in visiting Toronto for the 2026 World Cup.

UK respondents are the most likely to consider a visit (41%), while Germans are the least likely (25%), despite showing high awareness and interest in the event.

Outdoor Explorers from the UK stand out, with nearly half (46%) indicating they are likely to visit Toronto for the World Cup.



F2. How likely are you to visit Toronto, Canada because it's hosting the 2026 FIFA World Cup (5-point scale) (Excludes "don't know")
All respondents. n=1537

European travellers view Canada, Ontario, and Toronto positively, with strong appeal across markets—especially among UK travellers and segments like Culture Seekers and Refined Globetrotters. These destinations are rated more favourably than other long-haul options such as Australia and Japan, and significantly ahead of the United States.

A key insight is that **European travellers see Canada as a culturally and experientially distinct destination from the US**, with many expressing a preference for Canada due to dissatisfaction with American politics and values.

While cost remains the primary barrier, long-haul travel demand is stable, and interest in Toronto is supported by emotional alignment and strong perceptions of safety, inclusivity, and excitement.

Toronto's role as a FIFA 2026 host city presents a timely opportunity to increase awareness and convert global interest into travel intent.

Outdoor Explorers

- Messaging should highlight Ontario's natural offerings, adventure opportunities, and cultural authenticity.
- UK is a priority market for this segment.
- Storytelling that focuses on self-discovery, environmental immersion, and low-barrier adventure.

Refined Globetrotters

- Emphasize Ontario's elegant, culturally rich experiences—highlight historical sites, premium dining, guided tours, and curated travel packages.
- Focus messaging on Ontario's authenticity and charm, seamless infrastructure, political stability.
- Frame Ontario's appeal as a luxurious yet approachable destination.
- Tap into shared European-Canadian values and travel motivations rooted in cultural enrichment.

Culture Seekers

- Messaging should spotlight Ontario's authentic, culturally immersive experiences.
- Focus on history, community connections, and inclusive values.
- Connect with emotionally grounded storytelling.
- Emphasize political neutrality, shared social values, and cultural depth.