



CONTEXT IS EVERYTHING

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

Prepared for: Destination Ontario
May 5th, 2026

Alex Mazanik, CAIP
amazonik@crg.ca
(416) 820-7026

William Schatten, CAIP
wschatten@crg.ca
(416) 388-9455

50 Carroll Street, Toronto, Ontario

www.crg.ca

Embargoed - Please Do Not Share Until May 20th



CONTENTS

KEY OBJECTIVES	3
METHODOLOGY	4-7
EXECUTIVE SUMMARY	8-13
ONTARIO TRIP: INTENT AND DRIVERS	14-28
PERCEPTIONS OF ONTARIO	29-36
SAFETY, INCLUSION, AND TRUST	37-44
PRIDE AND EVENT-LED TRAVEL	45-51
BARRIERS, CHANNELS, AND MESSAGING	52-56
2SLGBTQI+ GENERAL TRAVELLER PROFILE	57-65
DEMOGRAPHICS	66-74

CONTEXT IS EVERYTHING



KEY OBJECTIVES

Overview:

CRG worked collaboratively with Destination Ontario (DO) and 20 partners to conduct a market intelligence study focused on 2SLGBTQI+ travel intentions related to Ontario, Canada. The purpose of this research is to assess the potential tourism opportunity among 2SLGBTQI+ travellers across key Canadian, U.S., and international markets, and to understand how this audience engages with Ontario as a leisure destination. The study generates data-driven insights on traveller perceptions, motivations, barriers, and behaviours to support Destination Ontario and tourism partners in developing informed marketing strategies, inclusive visitor experiences, and regional dispersal initiatives.

Objectives:

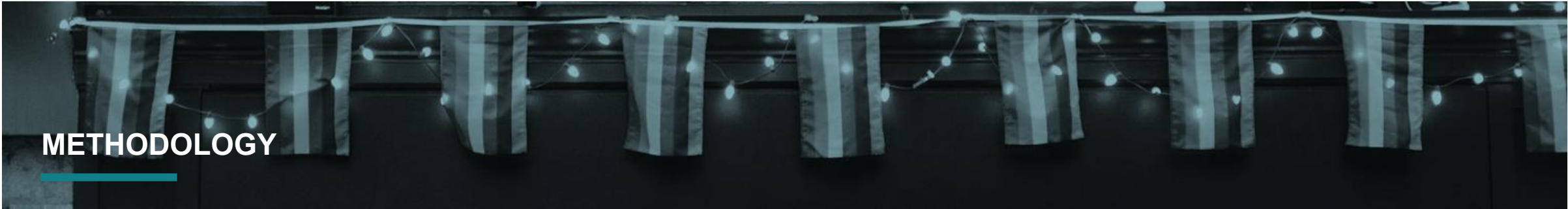
The objectives of this survey are to evaluate:

- Travel profiles, habits, and decision-making behaviour among 2SLGBTQI+ travellers across Canada, U.S., UK, Germany, and Mexico
- Awareness, perceptions, and intent to visit Ontario as a leisure destination
- Key motivations, trip drivers, and experience preferences influencing destination selection
- The role of safety, inclusion, and trust signals in destination choice
- The role of Pride and 2SLGBTQI+ events in driving travel to Ontario, including regional dispersal potential
- Barriers and deterrents that may prevent 2SLGBTQI+ travellers from choosing Ontario
- Preferred channels, messaging formats, and booking pathways for reaching this audience

The text 'KEY PARTNERS' in a bold, white, sans-serif font, positioned on a dark background with a string of lights and bunting. A teal horizontal line is located below the text.

KEY PARTNERS

- Destination Northern Ontario
- Destination Toronto
- Explorers' Edge (RTO12)
- Ontario's Highlands Tourism Organization (RTO11)
- Ottawa Tourism
- RTO3: Hamilton Halton Brant
- RTO4
- RTO7
- RTO9
- Tourism Kingston
- Tourism Partnership of Niagara (RTO2)
- Tourism Thunder Bay
- Tourism Vaughan
- Tourism Windsor Essex Pelee Island
- Visit Mississauga
- Wines of Ontario
- Canadian Queer Chamber of Commerce (CQCC)
- International LGBTQ+ Travel Association (IGLTA)
- Pride Toronto
- Tourism Industry Association of Ontario (TIAO)



METHODOLOGY

Methodology:

- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:

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

Fieldwork Date:

- March 27th – April 18th, 2026

Median Length of Interview:

- 15.8 minutes

Sample Size

Total	3488
Canada	774
Ontario	233
Quebec	229
Atlantic Canada	75
Western Canada	233
U.S.	1483
U.S. Drive	513
U.S. Fly	970
UK	410
Germany	410
Mexico	410

A decorative header image showing a string of white bunting flags and warm white string lights against a dark background.

METHODOLOGY

Survey Language:

The survey was administered in English and French in Canada, and in the primary language of each international market (English in the U.S. and U.K., German in Germany, and Spanish in Mexico).

Margin of Error:

Total: $\pm 1.7\%$

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%.

Significance Testing:

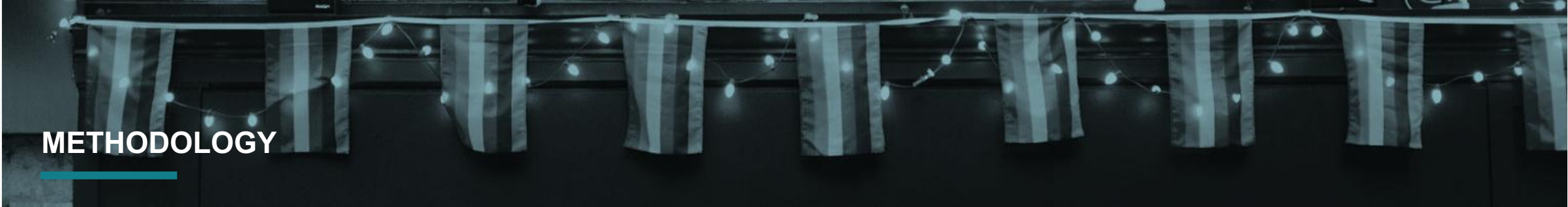
- Statistically significant differences (at the 95% confidence level) are stated throughout the report where possible.
- Proportions are compared using two-tailed non-parametric tests, and averages are compared using two-tailed t-tests.

Weighting:

Data presented in this report are unweighted to reflect the natural distribution of responses across markets and identity groups.

Reporting Considerations:

Throughout the report, significant differences by market and identity are highlighted where relevant.



METHODOLOGY

Approach to Identification:

2SLGBTQI+ respondents were identified based on self-identification. Specifically, respondents who identified with a non-heterosexual orientation, a gender identity outside of man or woman, or identified as transgender or trans were included in the study.

This approach was developed in collaboration with community partners, including Canadian Queer Chamber of Commerce (CQCC), International LGBTQ+ Travel Association (IGLTA), and Pride Toronto, helping to ensure that the language and framing used throughout the study were thoughtful, inclusive, and reflective of how individuals define their own identities.

2SLGBTQI+ Terminology:

For Canadian respondents, the survey used the terms “2SLGBTQI+” (EN) and “2ELGBTQI+” (FR) to reflect the inclusion of Two-Spirit identities in Canada. In other international markets, “LGBTQ+” was used to align with terminology more commonly used in those context. This helps ensure the language reflected regional context and norms, while maintaining consistency in how the community was represented across the study.

Segment Identities:

To align with the segmentation approach used in the 2019 Destination Canada LGBTQ+ Travel Study, three identity segments are used throughout this report.

- 1) **Gay and Bi+ Men** includes respondents who identify as gay, bisexual, or queer and identify their gender as man.
- 2) **Lesbian and Bi+ Women** includes respondents who identify as lesbian, bisexual, or queer and identify their gender as woman.
- 3) **Trans or Non-binary** includes respondents who identify as transgender, non-binary, two-spirit, or who selected a self-identified gender outside of man or woman, regardless of sexual orientation.

EXECUTIVE SUMMARY – ONTARIO TRAVEL PROFILE, BEHAVIOURS, MOTIVATIONS

2SLGBTQI+ travellers are active, self-directed leisure travellers. When it comes to overnight trips to Ontario, 2SLGBTQI+ travellers move in small groups of roughly two, typically friends or partners. International travellers stay significantly longer and spend considerably more per trip than Canadian domestic travellers, with Germany projecting the longest stays and the UK generating the highest spend. Summer dominates travel timing across nearly all markets, with the June to September window concentrating the majority of intended visits. Mexico shows relatively stronger interest in December travel. When it comes to accommodation, hotels dominate across all markets with mid-range being the most consistently preferred tier. *(See slides 16 – 18)*

What draws 2SLGBTQI+ travellers to Ontario varies significantly depending on where they are coming from. U.S. and UK travellers are the most motivated by 2SLGBTQI+ culture, nightlife, and community experiences. German and Mexican travellers both lead with nature, and place 2SLGBTQI+ culture as an almost equally strong co-motivator. Canadian domestic travellers stand apart from all international markets, with social connection and visiting friends or family as the primary driver. *(See slides 19 - 23)*

2SLGBTQI+ travellers choose destinations based on safety, inclusion, and values and most say they would choose a safer, more inclusive destination even if it costs more. These travellers are generally comfortable being open with their identity when they travel. Those who are comfortable with their identity are also most likely to visit Ontario, meaning Ontario is already resonating with the most engaged segment of this audience. *(See slides 38, 42)*

2SLGBTQI+ travellers evaluate destinations through a clear hierarchy of inclusion signals. Structural signals (e.g., legal protections, community attitudes, and political climate) are rated as the most important overall, across all markets and identity groups. Operational signals (e.g., staff training, visible Pride symbols, accreditation programs, and availability of 2SLGBTQI+ businesses) are also considered important but rank below structural factors. Accreditation is not among the most widely cited signals but among those who do find it important, it is a driver of Ontario consideration. It is a signal that carries significant weight for a specific and highly motivated segment of this audience. *(See slide 39)*



EXECUTIVE SUMMARY – PERCEPTIONS OF ONTARIO, SAFETY & INCLUSION

Ontario's reputation as a leisure destination is strong, and international markets rate it higher than domestic travellers do. The province is widely perceived as safe, multicultural and diverse, and a place where visitors can be themselves. Safety is perceived as a province-wide attribute, not something confined to major urban centres, and is broadly strong across all destination types and all markets. Benchmarked against the Ontario Travel & Tourism Monthly study, 2SLGBTQI+ travellers perceive the province as meaningfully more inclusive and diverse than the broader travelling public does. *(See slides 30 – 35)*

Ontario is seen as a welcoming destination for 2SLGBTQI+ travellers and stands apart from the U.S. Ontario scores significantly above the U.S. on perceived welcome and inclusivity across every market tested, including among U.S. respondents rating their own country. The gap is widest for trans or non-binary travellers. Only a minority of international travellers say they would visit Canada exclusively in combination with a U.S. trip, reinforcing Ontario's appeal as a destination worth visiting on its own terms. *(See slides 40, 43)*

Toronto and Niagara lead awareness and consideration by a wide margin, with Ottawa following at a meaningful distance. Beyond these gateways, destinations like Kingston, Muskoka, Southeastern Ontario, and the Bruce Peninsula show recognition that has not yet translated into active consideration. Summer dominates travel timing across nearly all markets, with driving being the primary way travellers move between Ontario destinations. *(See slides 24 – 28)*




EXECUTIVE SUMMARY – PRIDE, BARRIERS & OPPORTUNITIES

Pride drives travel to Ontario, and for most attendees it is the beginning of a broader provincial experience. Planning for Pride trips happen relatively quickly where most travellers decide within one to three months, with some international markets planning slightly further ahead. Nearly all Pride-attending visitors say they would explore beyond the host city during their trip, and the appetite for the broader province is there across all markets and identity groups. Smaller cities, towns, and nature-focused regions all register genuine interest, particularly among lesbian and bi+ women and trans or non-binary travellers who show above-average preference for community-scale and nature-based destinations. *(See slides 49, 50)*

Cost is the dominant barrier for Canadian domestic respondents, while safety concerns and not feeling welcome are the barriers most strongly associated with international markets. Unfavourable weather is cited consistently across all markets, as are cost of accommodation and transportation. When crossed against Ontario intent, safety concerns and not feeling welcome as a 2SLGBTQI+ traveller show the largest gaps between likely and unlikely visitors, suggesting that these two barriers are strongly associated with Ontario consideration. Among travellers who find accreditation programs important, not feeling welcome is cited at more than those who do not find accreditation important, suggesting a relationship between visible inclusion certification and feeling welcomed. *(See slide 53)*

General internet search, social media, and friends and family are the top inspiration channels for this audience, with 2SLGBTQI+-specific travel media ranking among the most trusted sources. For messaging, clear signals of welcome, genuine representation, respectful language, and peer reviews all matter to this audience in equal measure. Safety and inclusion are foundational to how this audience evaluates destinations, and authenticity runs throughout as performative or inauthentic messaging reduces trust for a meaningful share of respondents. Among those most likely to attend community events in Ontario, authentic representation and peer reviews from other travellers carry the most weight. *(See slides 54-56)*




EXECUTIVE SUMMARY – MARKET HIGHLIGHTS

Across all Canadian markets, social connection and visiting friends or family is the top driver for visiting Ontario, with 2SLGBTQI+ culture and community experiences playing a more background role than in any international market. Canadians skew toward mid-range to budget accommodation, reflecting a cost-sensitivity. Western Canada and Atlantic Canada are willing to visit but cost-constrained, and Quebec scores low on both Ontario Pride awareness and visit intent. *(See slide 19)*

United States is the highest-intent international market and the most commercially actionable segment in the study. For U.S. travellers, 2SLGBTQI+ culture, nightlife, and community spaces are the most explicit motivation when choosing Ontario as a destination, followed closely by food and culinary experiences, city exploration, and natural scenery. They skew toward luxury and mid-range accommodation and are already redirecting travel spend in response to the domestic political climate. *(See slides 18, 20)*

United Kingdom travellers, when considering Ontario specifically, are most strongly drawn by both 2SLGBTQI+ culture and iconic landmarks. They skew toward luxury accommodation alongside the U.S., and investment in UK-based travel trade partnerships is the most efficient near-term lever. *(See slides 18, 21)*



EXECUTIVE SUMMARY – MARKET HIGHLIGHTS

Germany is aware of Ontario and rates it positively, but intent to visit is the lowest of any international market. German travellers consistently under-index on the practical attributes that precede booking decisions: ease of planning, entry requirements, value for money, and exchange rates. Safety and welcome concerns are among the lowest of any market, meaning that Germany is not deterred by Ontario, it simply lacks the concrete information needed to turn positive sentiment into a booked trip. When considering Ontario specifically, natural scenery leads motivations, followed by 2SLGBTQI+ culture and iconic landmarks. (See slides 22)

Mexico combines exceptional destination enthusiasm with practical barriers around safety perception, border complexity, and access. When considering Ontario specifically, Mexican travellers are motivated by natural scenery and 2SLGBTQI+ culture and community experiences in equal measure. They prefer mid-range accommodation and travel in the largest average group of any market. Conversion requires removing friction, not building desire. (See slides 18, 23)

EXECUTIVE SUMMARY – IDENTITY SEGMENT HIGHLIGHTS

All three identity segments view Ontario positively and show meaningful intent to visit, but they differ in motivation, travel behaviour, and how they need to be reached. The foundation is shared, but what drives consideration and how each segment travels varies.

Trans or non-binary travellers are the highest-intent and highest-spend segment. They take the most trips per year, spend the most on an Ontario trip, and are the most likely to travel for community-led events, both Pride and non-Pride. They place the greatest weight on visible inclusion signals across every measure in the study, and the gap between how they perceive Ontario and the U.S. on welcome and inclusivity is the widest of any group. They are the most likely to be the primary decision-maker in their travel party and rely more heavily on 2SLGBTQI+-specific travel media than any other segment where over half cite it as an inspiration source. *(See slides 39, 44, 54)*

Gay and bi+ men are the most comfortable travelling openly and show strong Ontario intent. They lean toward urban, cultural, and culinary experiences, and skew toward luxury hotel accommodation. They are also more likely to be the primary decision-maker and have the highest income profile of the three segments. They use 2SLGBTQI+-specific travel media at above-average rates and are among the highest users of AI tools for travel inspiration. *(See slides 15, 38, 54)*

Lesbian and bi+ women show relatively lower intent, lower travel comfort, and lower spending of the three segments, but their travel profile points to a distinct audience. They favour nature, cottages and cabins, glamping, and small towns which are destination types that differ from the urban and nightlife experiences that dominate most 2SLGBTQI+ tourism content. They are more likely to share travel decisions equally with a partner than the other two segments. They plan Pride trips slightly further in advance, rely more on friends and family for inspiration, and skew lower on income, suggesting that value and relevance are the primary levers for this segment rather than awareness alone. *(See slides 15, 38, 49)*

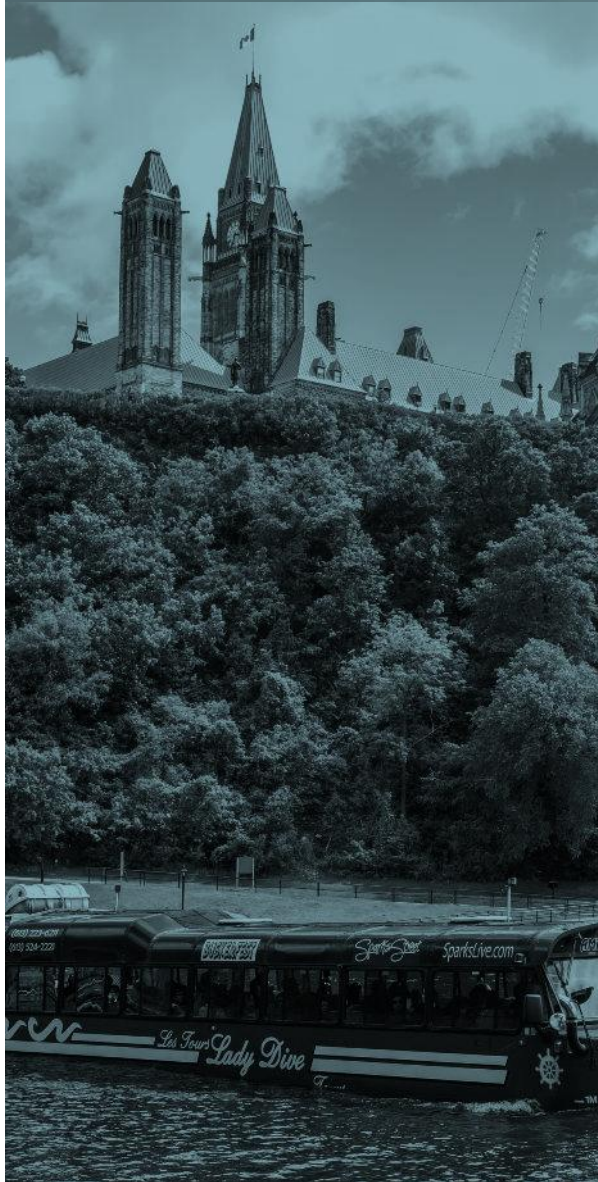
ONTARIO TRIP: INTENT AND DRIVERS

Ontario's awareness is high across international markets, and likelihood to visit is strongest among U.S. travellers, followed by Mexico and the UK. **Germany stands apart as a key opportunity market**: awareness depth is lower and visit intent is meaningfully softer, pointing to a need for deeper familiarity-building.

The reasons travellers consider visiting Ontario shift significantly depending on where they come from.

- **U.S. and UK travellers** are the most identity-driven in their Ontario motivations, though UK visitors pair this with a notably stronger pull toward iconic landmarks and natural scenery than their U.S. counterparts.
- **German and Mexican travellers** both lead with nature, but Mexican travellers place 2SLGBTQI+ culture as an equally strong co-motivator, while Germans treat community and cultural appeal as a secondary draw.
- **Canadian domestic travellers** stand apart from all international markets, with social connection and visiting friends or family as the primary driver, and identity-specific motivations playing a more background role.

Summer dominates trip timing across nearly all markets, with interest peaking from June through September. **International visitors plan to stay considerably longer and spend far more per trip** than domestic travellers, with Germany projecting the longest stays and the UK generating the highest spend.



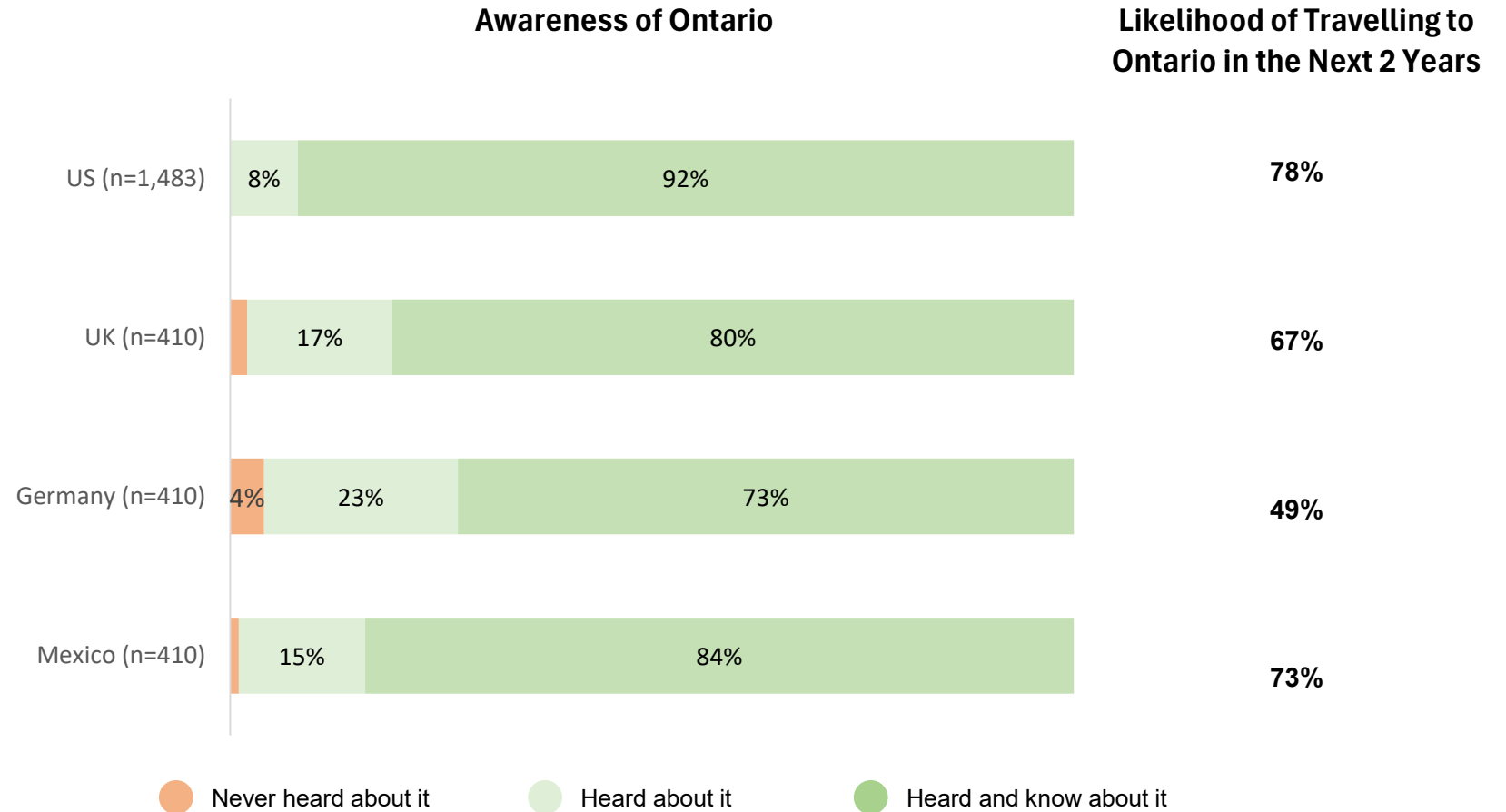
AWARENESS OF ONTARIO AND VISIT INTENT

Awareness is deepest in the US, UK and Mexico, where most respondents say they have heard of Ontario and know about it, and these markets also show the strongest likelihood of travelling to Ontario in the next two years.

Germany stands out as the key opportunity: awareness is somewhat lower and future visit intent is meaningfully softer, suggesting more work is needed to both grow familiarity and move consideration into active planning.

Travellers with children, and those who have visited Ontario before, are significantly more likely to plan a trip to the province in the next two years.

Gay and bi+ men, as well as trans and non-binary travellers, report higher familiarity with Ontario and a greater likelihood of visiting than lesbian and bi+ women.



T0B Before today, how would you best describe your awareness of Ontario, Canada?
 T1 How likely are you to take an overnight leisure trip in Ontario, Canada in the next 2 years?
 T0B Respondents who are not from Canada (n=2,714)/ T1 Respondents who are aware of Ontario, Canada (n=3,410)

ONTARIO TRIP: NUMBER OF NIGHTS AND SPEND

International travellers stay significantly longer during their trip to Ontario and spend far more per trip than Canadians.

Canadian trips average 3.7 nights, compared with 4.8 nights for US travellers and 7.5 nights for international visitors overall.

Among international markets, Germany stands out for the longest stays at 10.0 nights, while the UK generates the highest spend of roughly \$6,500 per trip.

Across markets, 2SLGBTQI+ travellers travel with around two companions, with Mexican and US travellers at the higher end of the range and Canadian travellers slightly lower.

Younger people (25-34) are likely to travel with more companions than older ones. Friends are the most common companions overall, ahead of partners/spouses and children.

	Average Number of Nights Per Ontario Trip	Average Number of Travel Companions	Spend Per Ontario Trip
Canada	3.7	1.5	\$1,354
Ontario	3.1	1.6	\$1,023
Quebec	3.3	1.6	\$1,138
Atlantic Canada	4.2	1.6	\$1,890
Western Canada	4.5	1.4	\$1,777
U.S.	4.8	2.2	\$4,925
U.S. Drive	4.7	2.1	\$4,514
U.S. Fly	4.8	2.3	\$5,172
International	7.5	2.2	\$6,135
UK	7.0	2.1	\$6,545
Germany	10.0	1.8	\$5,895
Mexico	5.9	2.6	\$5,924

T4 How many nights would you most likely stay in a leisure trip in Ontario, Canada?

T4A How many people will you be travelling with on your trip in Ontario, Canada? Please enter the number of people travelling with you in each category.

T4B (CAD) Approximately how much would you expect to spend in total on this overnight leisure trip in Ontario, Canada? Please consider the total cost for everyone in your travel party. Your best estimate is fine. (Excluding airfare and pre-trip shopping)

T4 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,379)/ T4A/T4B Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,379)

ONTARIO TRIP: PREFERRED MONTHS OF TRAVEL

Summer travels to Ontario dominate across domestic and most international markets.

2SLGBTQI+ travellers are actively considering trips to Ontario, with interest peaking from June through September across all key markets and dropping back sharply in the winter months.

Mexico follows the same broad summer pattern but at slightly lower levels, with a relatively stronger interest in December, reinforcing the earlier finding that Mexican demand has more of a holiday-season component.

	Canada (n=477)	US (n=1,120)	UK (n=254)	Germany (n=187)	Mexico (n=292)
January	4%	6%	4%	4%	4%
February	5%	9%	6%	6%	3%
March	7%	9%	8%	9%	6%
April	12%	13%	15%	11%	9%
May	23%	26%	22%	21%	10%
June	41%	44%	34%	39%	18%
July	49%	44%	28%	41%	26%
August	47%	37%	36%	40%	24%
September	34%	24%	28%	40%	15%
October	20%	16%	16%	20%	13%
November	7%	10%	11%	10%	17%
December	9%	10%	16%	8%	28%

T3 Which month(s) are you considering for an overnight leisure trip in Ontario, Canada? Please select all that apply
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,333)

ONTARIO TRIP: ACCOMMODATION PREFERENCES

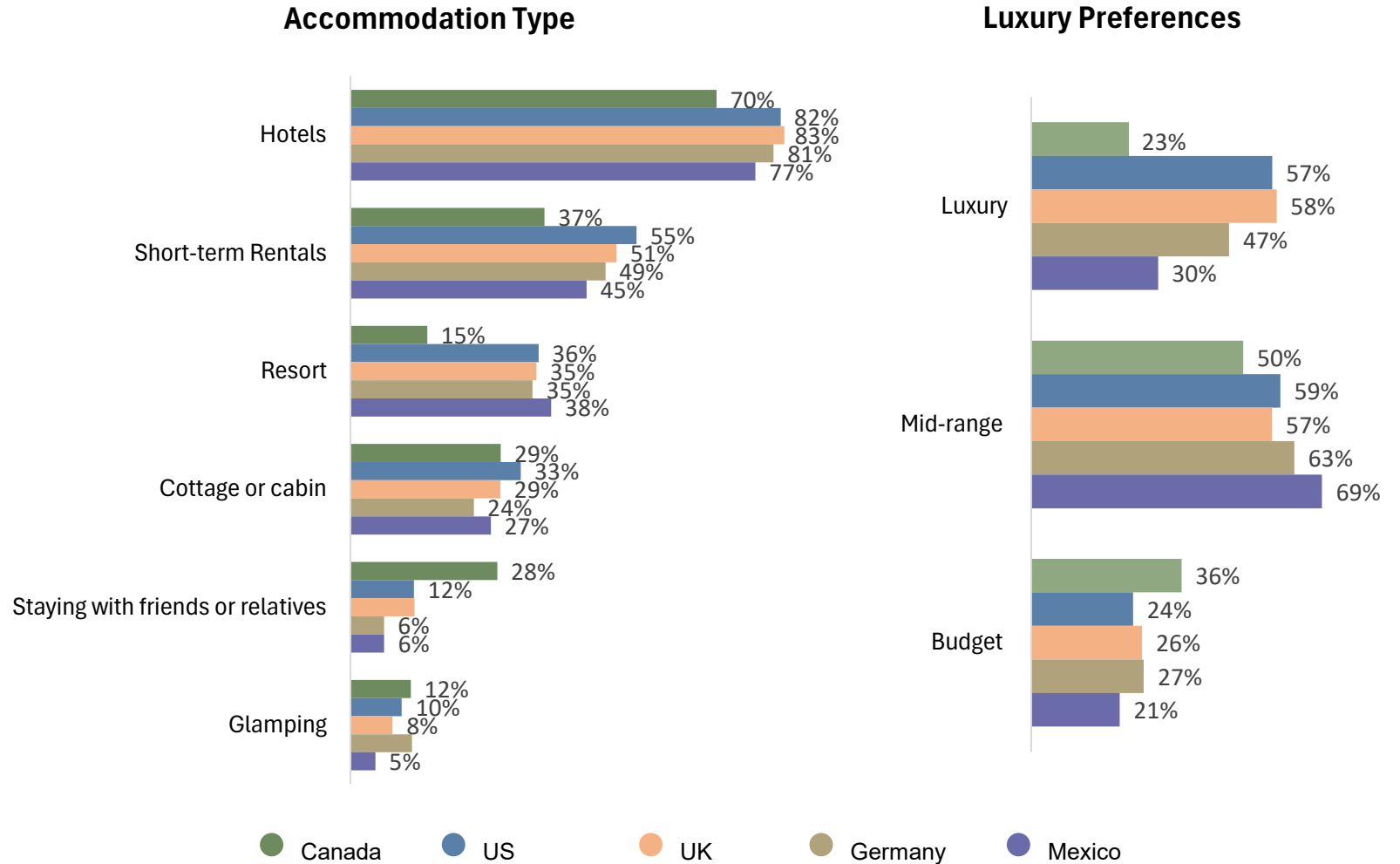
Hotels are the dominant accommodation choice across all markets, but meaningful differences emerge in tier preferences and alternative accommodation types.

Short-term rentals are a secondary option, particularly for US travellers.

Within hotel and short-term rental preferences, mid-range is the most consistently selected tier across all markets, while luxury is chosen most frequently by US and UK travellers.

Mexico stands out with the highest mid-range selection of any market, while Canadian domestic respondents show the strongest inclination toward budget options.

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



T7 Where would you most likely stay on an overnight leisure trip in Ontario, Canada? Please select all that apply. Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,348)

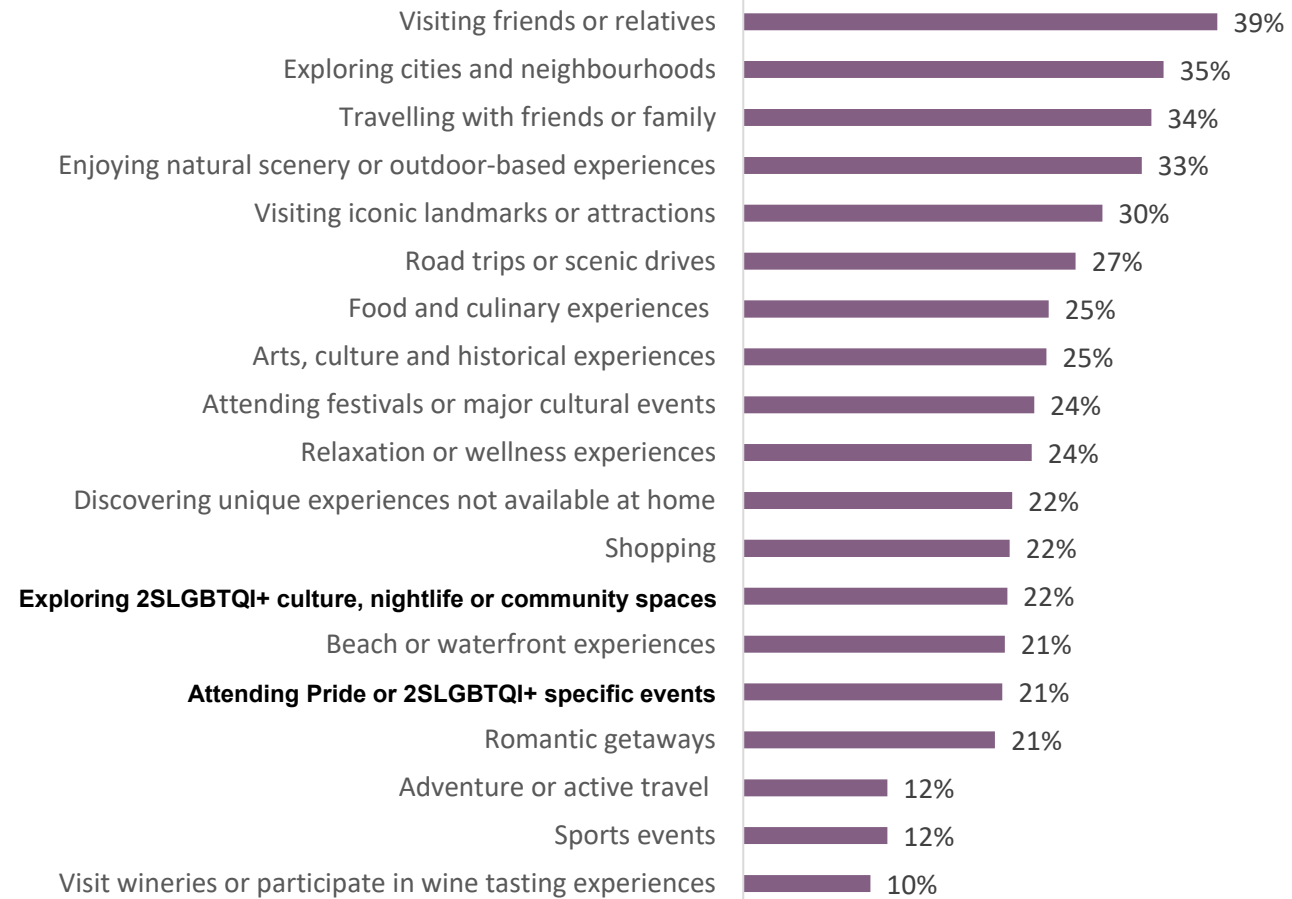
Canadian 2SLGBTQI+ travellers prioritise visiting friends or relatives when considering a trip to Ontario.

Social and personal connection becomes the primary driver when Ontario is the destination, with visiting friends or relatives, travelling with friends or family, and exploring cities all clustering near the top.

Compared to general travel, relaxation and wellness drops noticeably as a motivator, while iconic landmarks rise, suggesting travellers have specific Ontario experiences in mind.

Identity-specific motivations such as exploring 2SLGBTQI+ culture and attending Pride events are present but remain in the mid-range, reinforcing that Ontario's appeal to Canadian domestic travellers rests on mainstream leisure strengths rather than community-specific programming alone.

Main Reasons for Visiting Ontario



T2 What are the main reasons you would consider taking an overnight leisure trip in Ontario, Canada? Please select all that apply
 Only showing statements with above 10%
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,378) (Canada n=498)

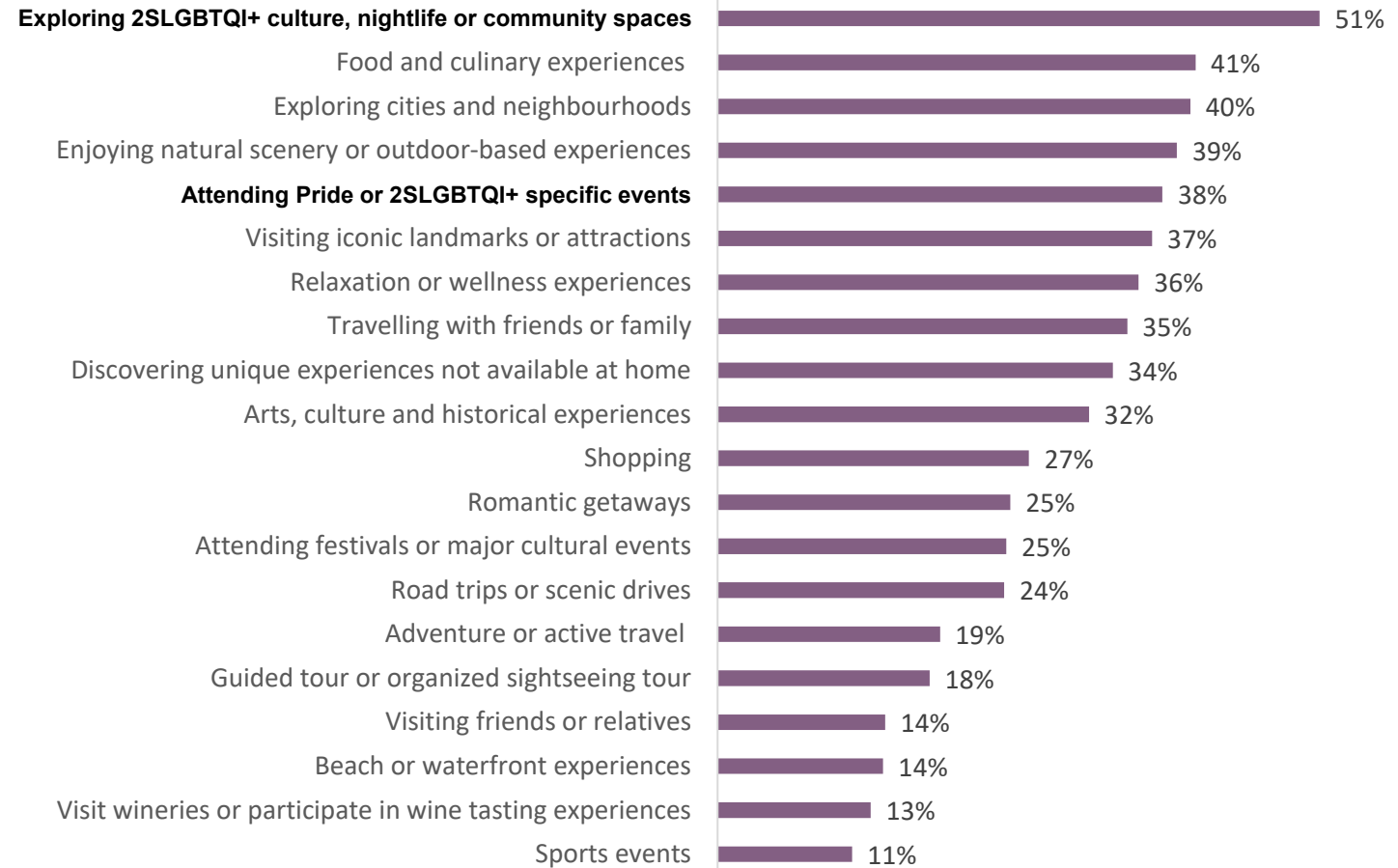
ONTARIO TRIP PURPOSE – US

When considering an Ontario trip specifically, U.S. 2SLGBTQI+ travellers are firmly led by identity-driven motivations, with exploring 2SLGBTQI+ culture ranking at the very top, consistent with their general travel profile.

Unlike Canadian domestic travellers, U.S. visitors arrive with a clear community-focused agenda for Ontario. Food and culinary experiences, city exploration, and natural scenery follow closely, reflecting a strong appetite for broad destination experiences alongside the 2SLGBTQI+ scene.

Attending Pride or 2SLGBTQI+ specific events also ranks prominently. Compared to general US travel, relaxation and wellness drops noticeably as an Ontario-specific driver, while the overall ranking structure remains largely stable.

Main Reasons for Visiting Ontario



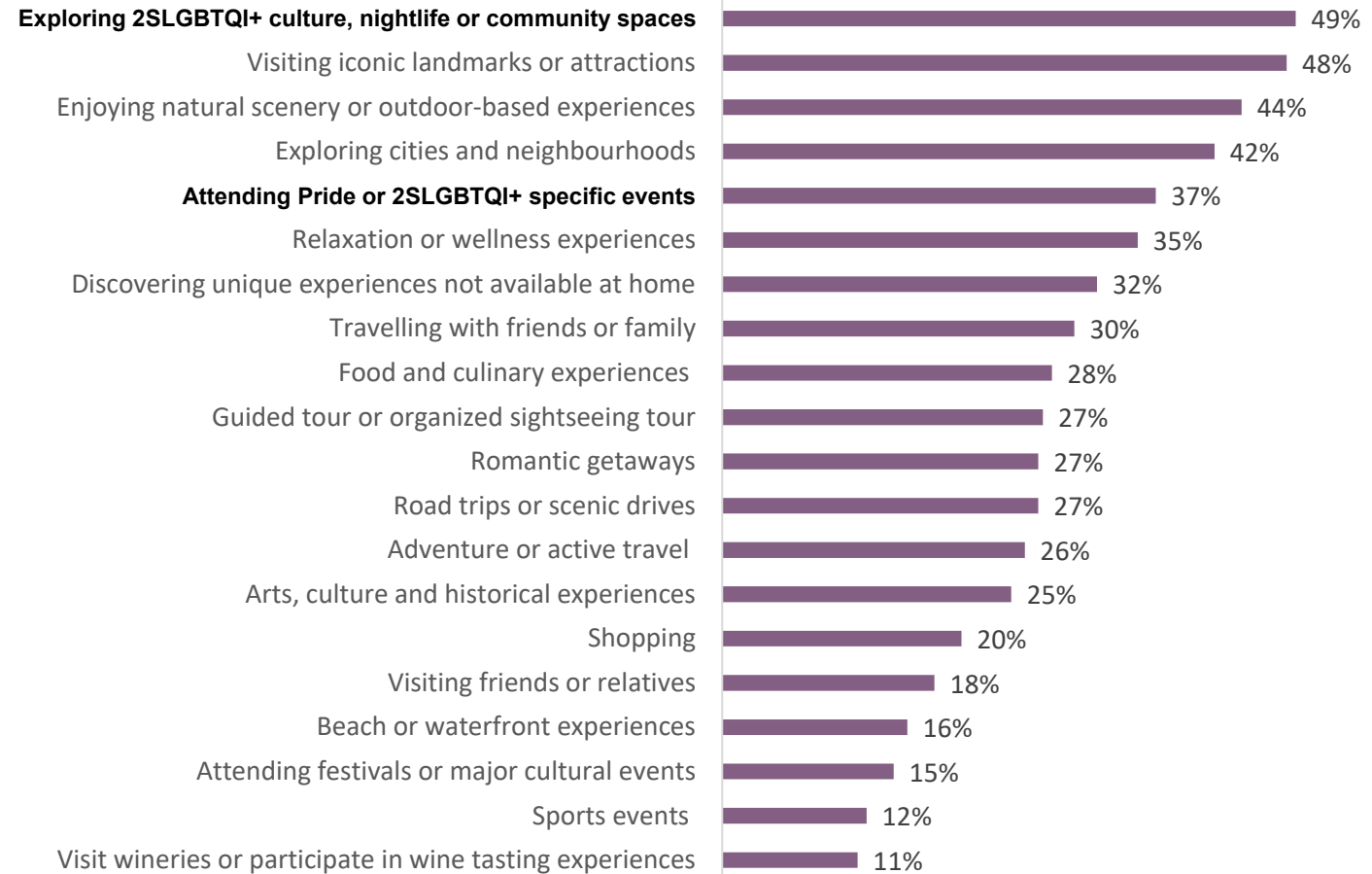
T2 What are the main reasons you would consider taking an overnight leisure trip in Ontario, Canada? Please select all that apply
 Only showing statements with above 10%
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,378) (US n=1,132)

UK 2SLGBTQI+ travellers lead with exploring 2SLGBTQI+ culture and nightlife, but iconic landmarks and natural scenery emerge as distinctly stronger motivators compared to their general travel profile.

The Ontario-specific picture shifts meaningfully from general UK travel preferences. While 2SLGBTQI+ culture retains its top position, iconic landmarks and natural scenery jump notably, reflecting that Ontario's recognisable attractions are a genuine pull for this market.

Attending Pride and 2SLGBTQI+ events remains a solid mid-tier motivator, consistent with the broader identity-driven travel orientation of this market.

Main Reasons for Visiting Ontario



T2 What are the main reasons you would consider taking an overnight leisure trip in Ontario, Canada? Please select all that apply
 Only showing statements with above 10%
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,378) (UK n=261)

ONTARIO TRIP PURPOSE – GERMANY

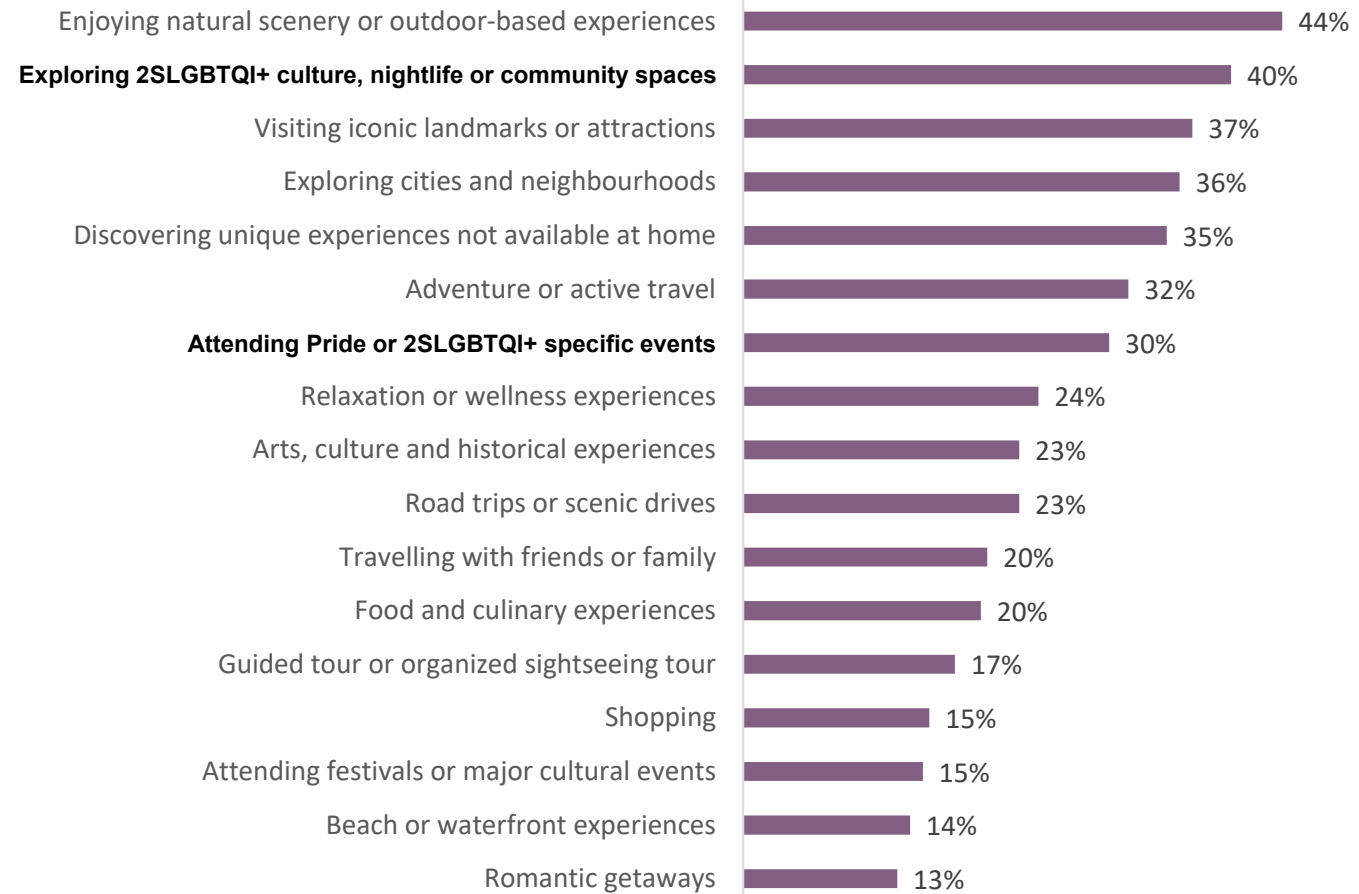
When considering an Ontario trip specifically, German 2SLGBTQI+ travellers are drawn primarily by natural scenery.

Nature moves to the top for Ontario specifically, replacing the beach and landmark preferences that lead in general German travel. Thus, Ontario is being mentally pictured as a nature and landscape destination rather than a classic sun-and-sea holiday, which plays directly to the province's genuine strengths.

2SLGBTQI+ culture and nightlife rises notably compared to general travel, suggesting that Ontario's community appeal registers more strongly once Germany travellers are thinking about the destination specifically.

Food, relaxation, and social travel purposes all sit lower, consistent with Germany's generally more practical and experience-focused travel mindset.

Main Reasons for Visiting Ontario



T2 What are the main reasons you would consider taking an overnight leisure trip in Ontario, Canada? Please select all that apply
 Only showing statements with above 10%
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,378) (Germany n=189)

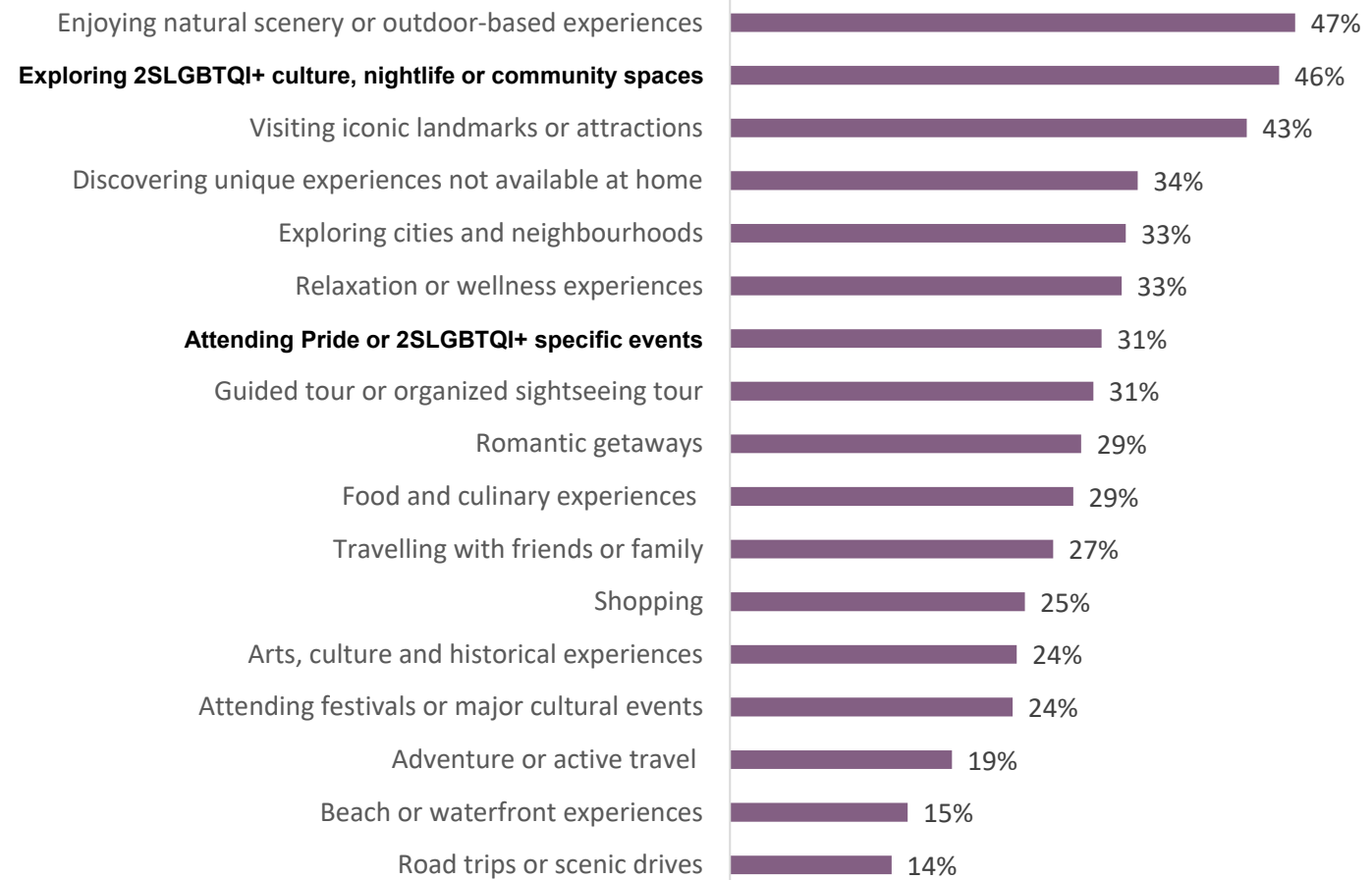
When considering an Ontario trip specifically, Mexican 2SLGBTQI+ travellers are motivated by a strong and balanced combination of natural scenery and 2SLGBTQI+ culture, mirroring their general travel profile.

Ontario is well-aligned with what Mexican travellers already seek, which is a meaningful signal for this market.

Discovering unique experiences not available at home holds steady as a motivator, reflecting Mexican travellers' broader appetite for destination discovery.

Beach and waterfront experiences drop considerably compared to general travel. Food and culinary experiences also recede.

Main Reasons for Visiting Ontario



T2 What are the main reasons you would consider taking an overnight leisure trip in Ontario, Canada? Please select all that apply
 Only showing statements with above 10%
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,378) (Mexico n=295)

AWARENESS AND CONSIDERATION OF ONTARIO DESTINATIONS

Toronto, Niagara Region, and Ottawa dominate both awareness and consideration, operating as Ontario's primary conversion anchors for 2SLGBTQI+ travellers.

These three destinations stand apart from the rest of the province, combining high awareness with strong consideration, meaning that when travellers know them, they actively want to visit.

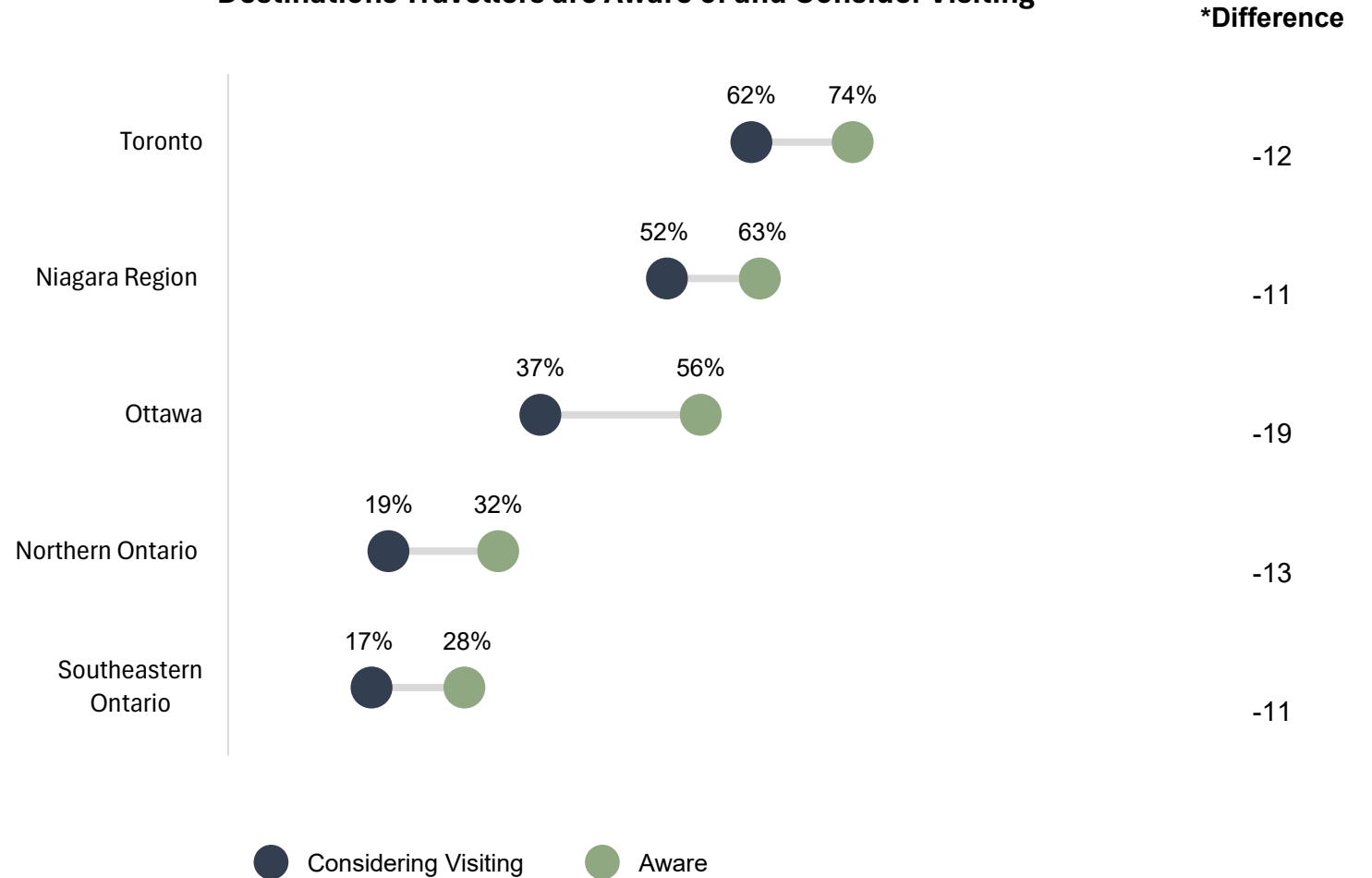
Travellers from the UK are significantly more aware of Ottawa and more likely to consider visiting than in other markets.

Northern Ontario achieves reasonable awareness but consideration drops off more sharply. Southeastern and Southwestern Ontario show modest awareness with limited consideration.

These reflect a pattern seen across some destinations where recognition has not yet translated into compelling reasons to visit.

**Difference = Considering minus Aware*

Destinations Travellers are Aware of and Consider Visiting



T6A Which of the following regions or destinations in Ontario, Canada are you aware of? Please select all that apply
 T6B Which destinations in Ontario, Canada would you consider visiting during this trip? Please select all that apply - rebased to NET
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,327)

AWARENESS AND CONSIDERATION OF ONTARIO DESTINATIONS

Toronto, Niagara Region, and Ottawa dominate both awareness and consideration, operating as Ontario's primary conversion anchors for 2SLGBTQI+ travellers.

These three destinations stand apart from the rest of the province, combining high awareness with strong consideration, meaning that when travellers know them, they actively want to visit.

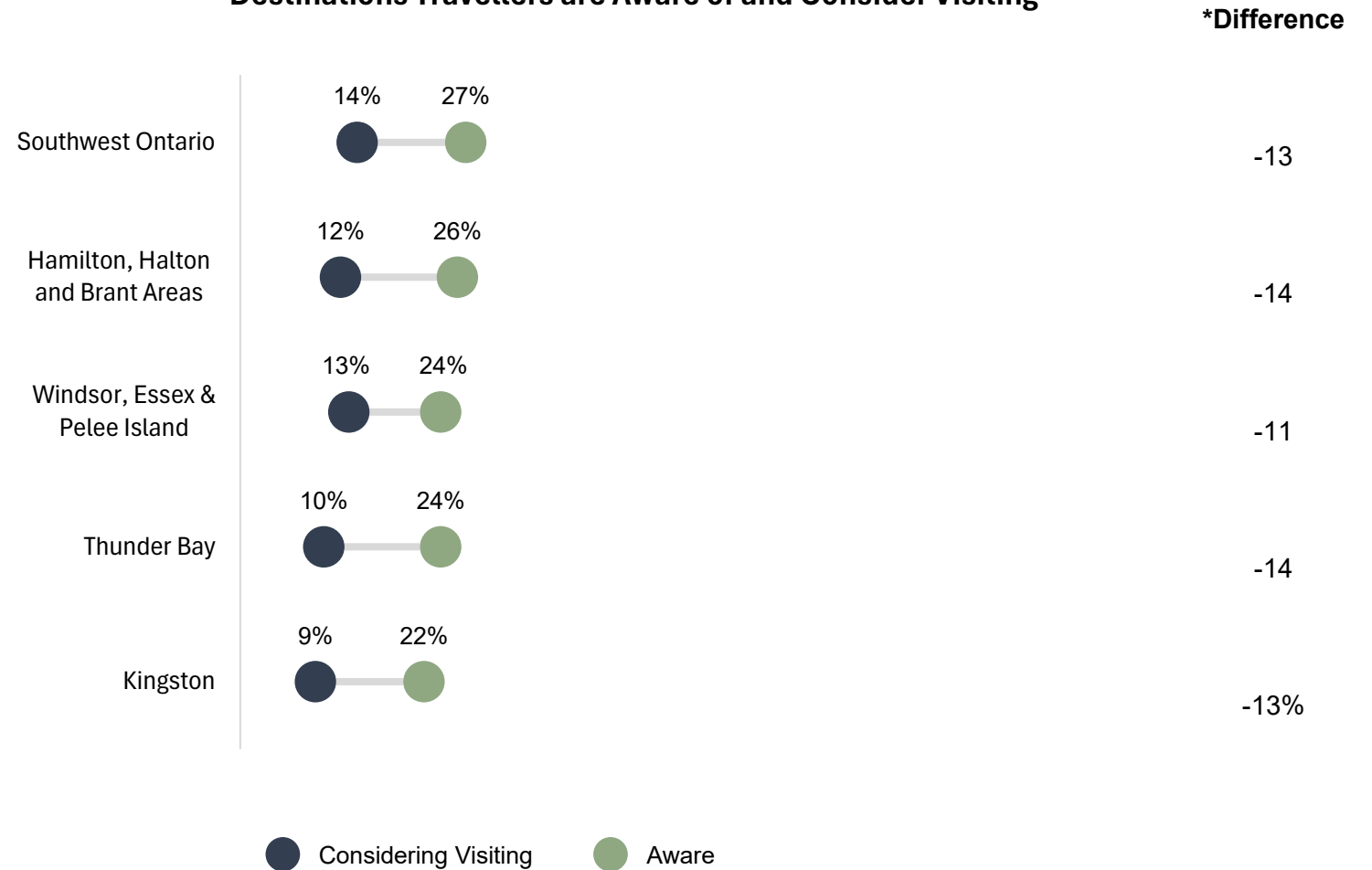
Travellers from the UK are significantly more aware of Ottawa and more likely to consider visiting than in other markets.

Northern Ontario achieves reasonable awareness but consideration drops off more sharply. Southeastern and Southwestern Ontario show modest awareness with limited consideration.

These reflect a pattern seen across some destinations where recognition has not yet translated into compelling reasons to visit.

**Difference = Considering minus Aware*

Destinations Travellers are Aware of and Consider Visiting



T6A Which of the following regions or destinations in Ontario, Canada are you aware of? Please select all that apply
 T6B Which destinations in Ontario, Canada would you consider visiting during this trip? Please select all that apply - rebased to NET
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,327)

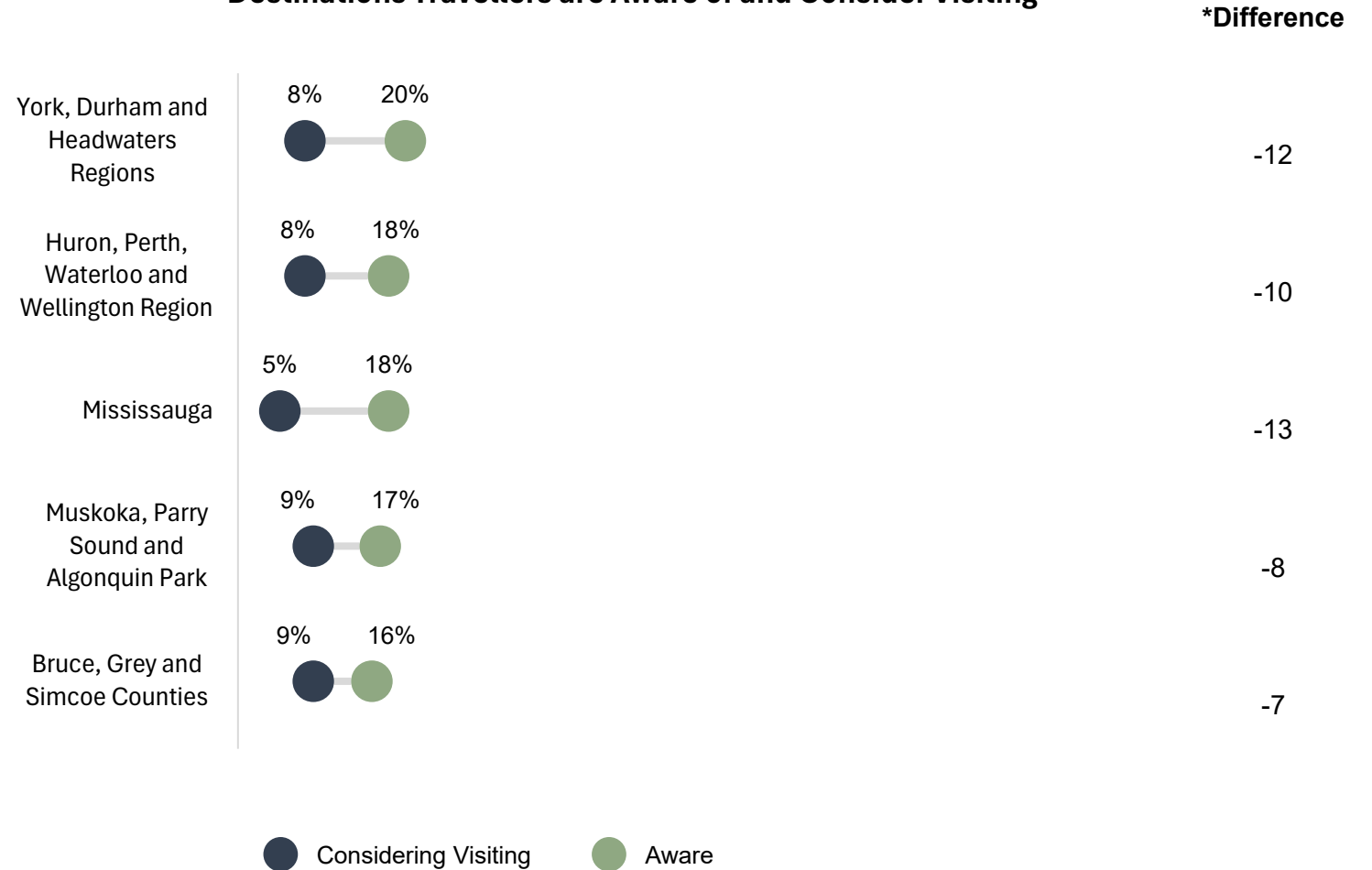
AWARENESS AND CONSIDERATION OF ONTARIO DESTINATIONS (CONTINUED)

Awareness of Ontario's smaller regions and cities remains limited overall, with consideration dropping across nearly all destinations.

Kingston leads this group on awareness but consideration remains low relative to that recognition.

Nature-focused regions such as Muskoka, Parry Sound and Algonquin Park, and Bruce, Grey and Simcoe Counties show awareness that could be leveraged given strong nature motivations identified among several key markets.

Destinations Travellers are Aware of and Consider Visiting



*Difference = Considering minus Aware

T6A Which of the following regions or destinations in Ontario, Canada are you aware of? Please select all that apply
 T6B Which destinations in Ontario, Canada would you consider visiting during this trip? Please select all that apply - rebased to NET
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,327)

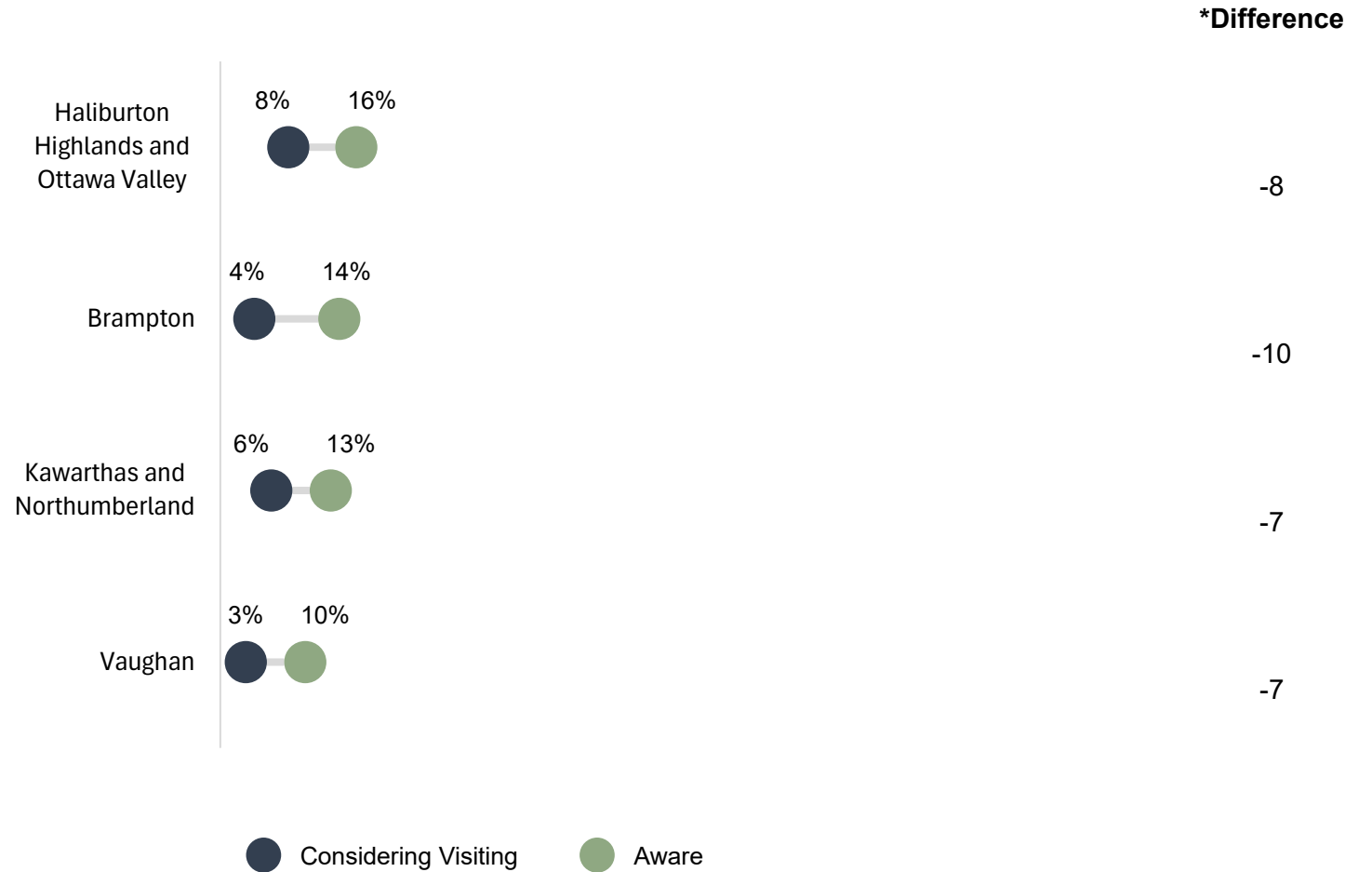
AWARENESS AND CONSIDERATION OF ONTARIO DESTINATIONS (CONTINUED)

Awareness of Ontario's smaller regions and cities remains limited overall, with consideration dropping across nearly all destinations.

Kingston leads this group on awareness but consideration remains low relative to that recognition.

Nature-focused regions such as Muskoka, Parry Sound and Algonquin Park, and Bruce, Grey and Simcoe Counties show awareness that could be leveraged given strong nature motivations identified among several key markets.

Destinations Travellers are Aware of and Consider Visiting



*Difference = Considering minus Aware

T6A Which of the following regions or destinations in Ontario, Canada are you aware of? Please select all that apply
 T6B Which destinations in Ontario, Canada would you consider visiting during this trip? Please select all that apply - rebased to NET
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,327)

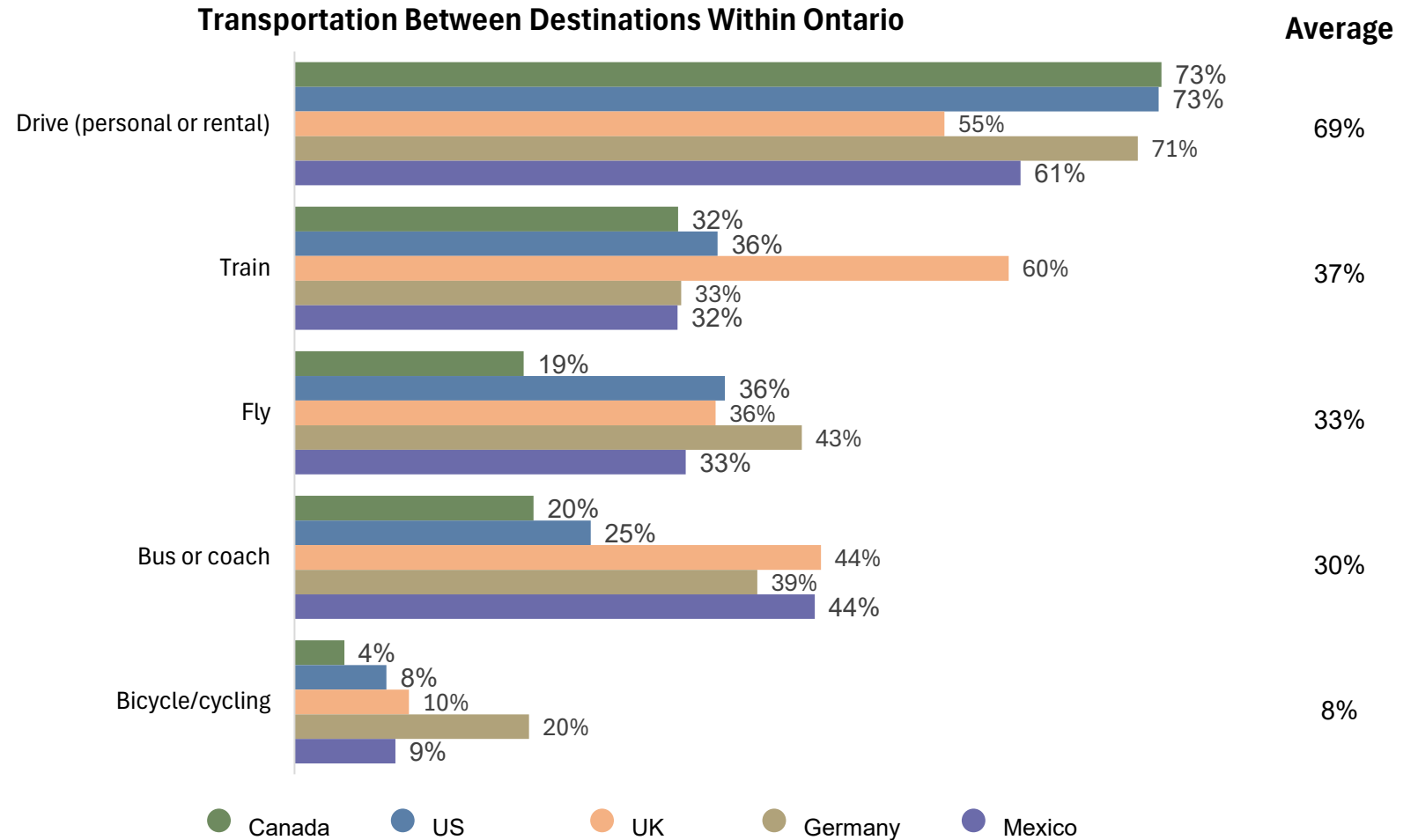
ONTARIO TRIP: TRANSPORTATION ACROSS DESTINATIONS

Driving is the dominant mode of inter-regional travel within Ontario across most markets.

Canada and the U.S. lead on driving, reflecting geographic proximity and road-trip culture. Train emerges as a notable alternative for UK respondents, likely reflecting familiarity with rail travel at home.

Germany and Mexico show relatively stronger interest in bus/coach and flying between destinations. Cycling remains marginal across all markets but highest in Germany.

Those who have been to Ontario are more likely to choose driving, while those who have not visited are more likely to choose the train.



T8 How would you most likely travel between destinations within Ontario, Canada during your leisure trip? Please select all that apply
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada across more than one region. (n=2,340)



PERCEPTIONS OF ONTARIO

Ontario is viewed as a strong leisure destination across all markets, with ratings consistently **higher among international travellers** than domestic ones.

Across all markets, Ontario's perceived strengths are clear and consistent. **Safety and natural** landscapes anchor the province's reputation internationally, with outdoor experiences, things to do, and a sense of personal comfort rounding out the top attributes. **Inclusivity is already embedded in how Ontario is perceived**, as 9 in 10 travellers agree that it is **multicultural and diverse**, and a **place where travellers can be themselves**. This reflects that Ontario's welcoming identity is already landing.

Value for money is the most differentiated attribute across markets. International travellers rate Ontario's value favourably, while Canadian domestic respondents are considerably more reserved. **Ontario is also broadly seen as a compelling standalone destination** that offers experiences genuinely different from the United States.

Entry requirements are viewed as straightforward by most markets, though Germany rates this lower, pointing to a potential friction point worth addressing through clearer communications. Political values alignment scores consistently across all international markets, and Mexico leads on virtually every dimension tested.

ONTARIO DESTINATION RATING

Ontario's brand as a leisure destination is strong across all 2SLGBTQI+ markets, and particularly so among international travellers.

Positive ratings are solid among Canadian 2SLGBTQI+ travellers, but they are even higher in every international market, with Mexico, Germany and the UK all rating Ontario especially favourably.

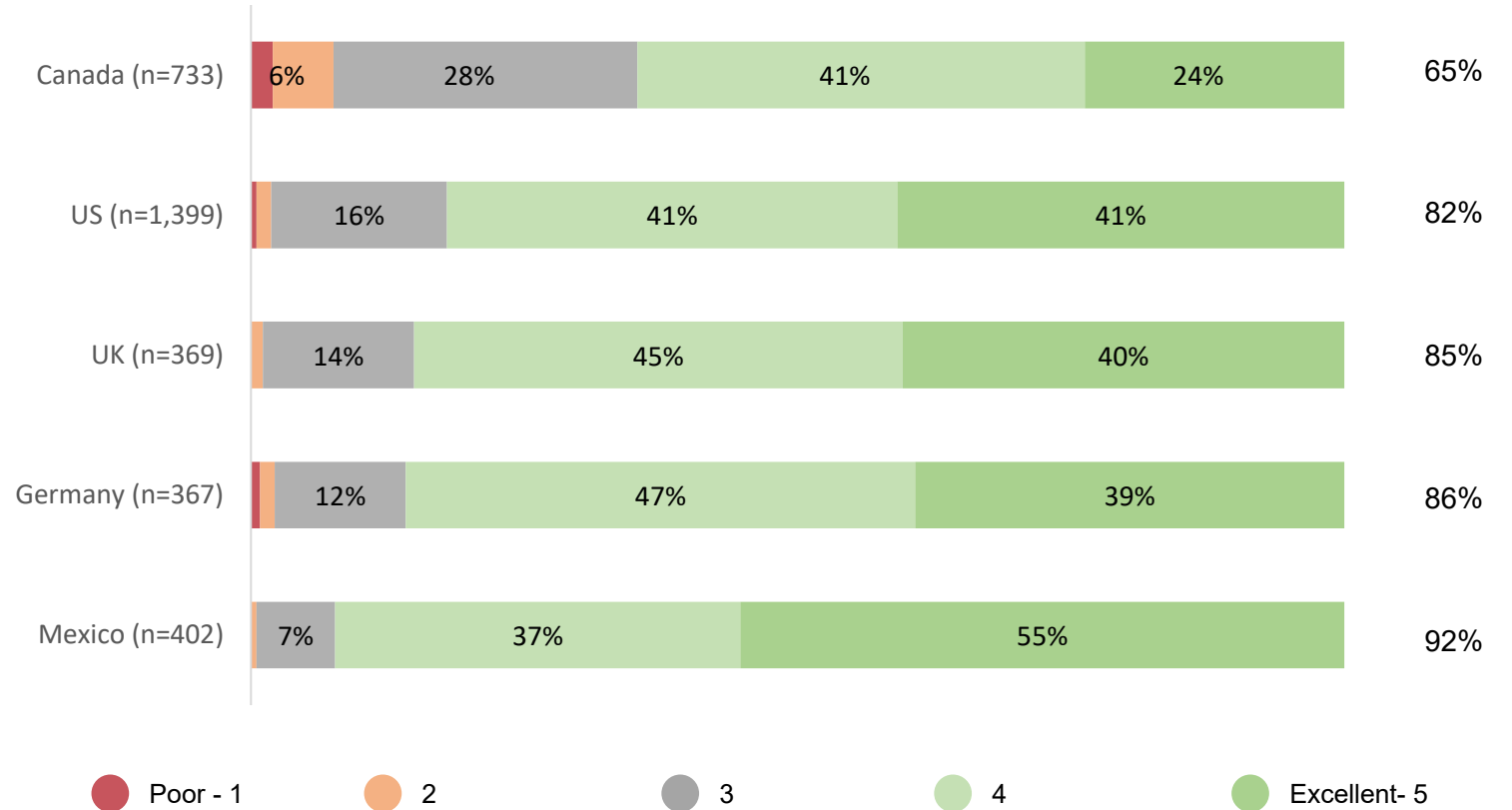
Ratings are higher among travellers with children, suggesting Ontario's family-friendly offer resonates particularly well with 2SLGBTQI+ parents.

By contrast, younger adults (25–34) rate Ontario somewhat lower than older adults.

Positive ratings are stronger among gay and bi+ men and trans or non-binary travellers, and lower among lesbian and bi+ women.

Rating Ontario As a Leisure Travel Destination

TOP 2



P1 Overall, how would you rate Ontario, Canada as a leisure travel destination?
 Respondents from Canada or aware of Ontario, Canada (n=3,275)

PERCEPTIONS OF ONTARIO

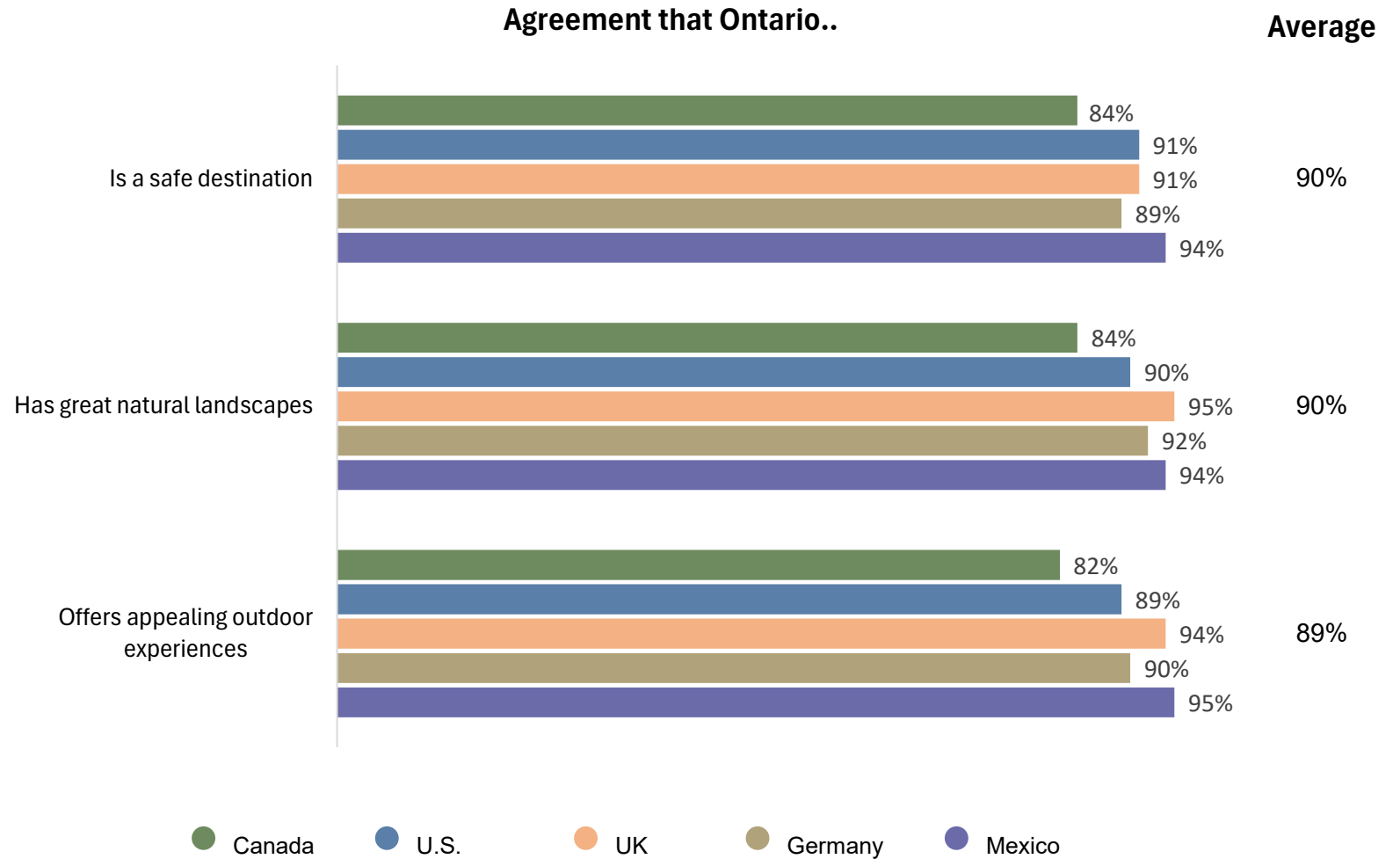
Ontario is most strongly associated with safety, natural landscapes, and personal comfort.

Being seen as a safe destination and having great natural landscapes both rank at the top.

Feeling welcome as oneself and Ontario's multicultural identity also score highly, signalling that the province's inclusivity positioning is broadly landing.

International markets consistently rate these attributes above Canada domestically, suggesting that Ontario's reputation travels well abroad.

Attributes like having lots to do and offering unique experiences round out a strong overall picture, with no single market showing skepticism toward any of these core strengths.



P2A Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 P2B Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 P2A Respondents from Canada or aware of Ontario, Canada (n=2,161)/ P2B Respondents from Canada or aware of Ontario, Canada (n=2,902)

PERCEPTIONS OF ONTARIO

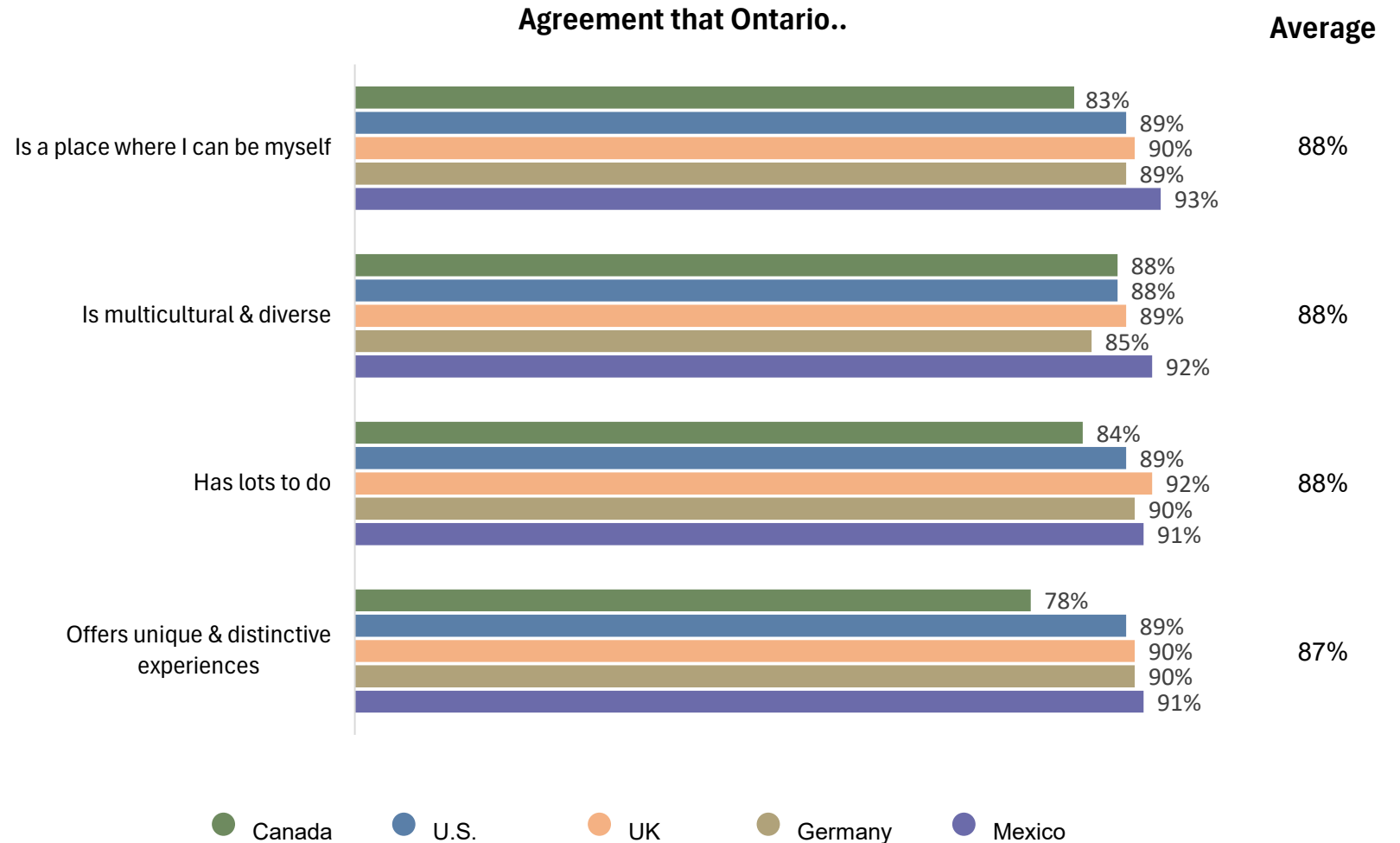
Ontario is most strongly associated with safety, natural landscapes, and personal comfort.

Being seen as a safe destination and having great natural landscapes both rank at the top.

Feeling welcome as oneself and Ontario's multicultural identity also score highly, signalling that the province's inclusivity positioning is broadly landing.

International markets consistently rate these attributes above Canada domestically, suggesting that Ontario's reputation travels well abroad.

Attributes like having lots to do and offering unique experiences round out a strong overall picture, with no single market showing skepticism toward any of these core strengths.



P2A Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 P2B Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 P2A Respondents from Canada or aware of Ontario, Canada (n=2,161)/ P2B Respondents from Canada or aware of Ontario, Canada (n=2,902)

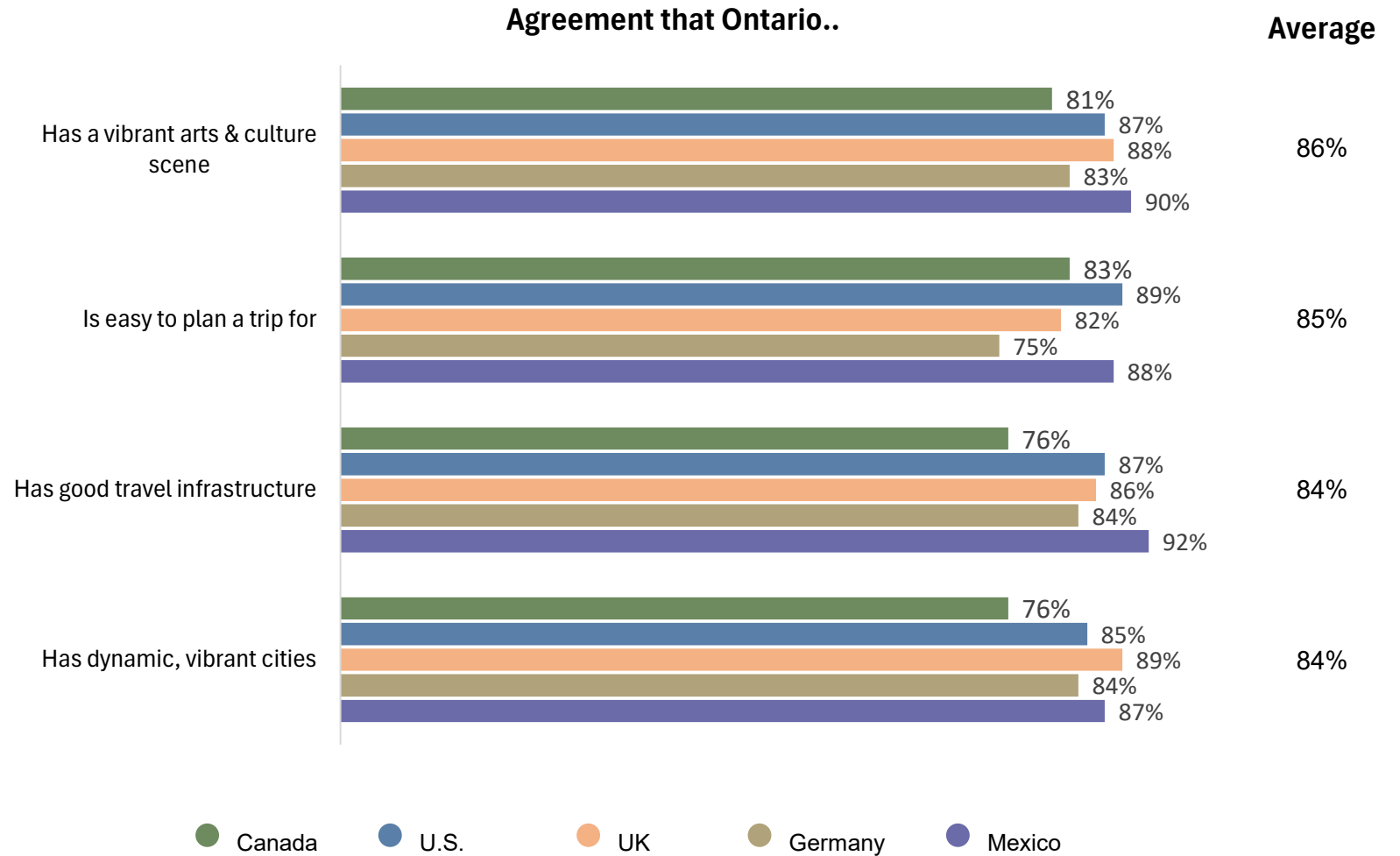
PERCEPTIONS OF ONTARIO

Ontario's arts scene, ease of planning, and city vibrancy are well-regarded internationally, though value for money remains the most differentiated attribute across markets.

Ease of trip planning is perceived positively overall, with Germany rating it somewhat lower than others. This is relevant for targeting markets that may need more practical destination content and trip-planning support to convert interest into bookings.

Having vibrant 2SLGBTQI+ communities scores consistently high across.

Mexico leads on arts and culture, travel infrastructure, and good value. Value for money a notably stronger perception internationally than domestically, where Canadian travellers are the most reserved.



P2A Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?

P2B Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?

P2A Respondents from Canada or aware of Ontario, Canada (n=2,161)/ P2B Respondents from Canada or aware of Ontario, Canada (n=2,902)

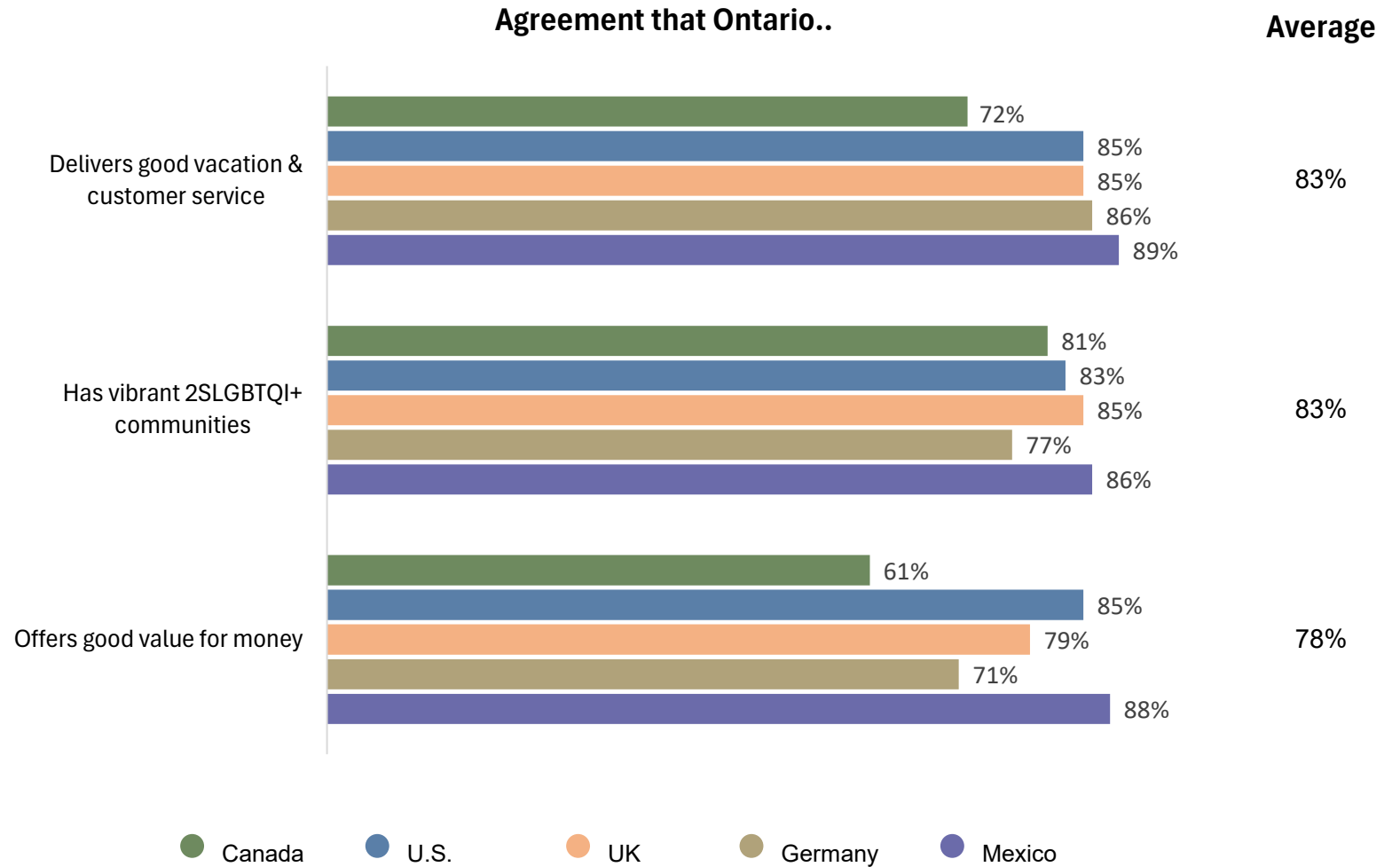
PERCEPTIONS OF ONTARIO

Ontario's arts scene, ease of planning, and city vibrancy are well-regarded internationally, though value for money remains the most differentiated attribute across markets.

Ease of trip planning is perceived positively overall, with Germany rating it somewhat lower than others. This is relevant for targeting markets that may need more practical destination content and trip-planning support to convert interest into bookings.

Having vibrant 2SLGBTQI+ communities scores consistently high across.

Mexico leads on arts and culture, travel infrastructure, and good value. Value for money a notably stronger perception internationally than domestically, where Canadian travellers are the most reserved.



P2A Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 P2B Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 P2A Respondents from Canada or aware of Ontario, Canada (n=2,161)/ P2B Respondents from Canada or aware of Ontario, Canada (n=2,902)

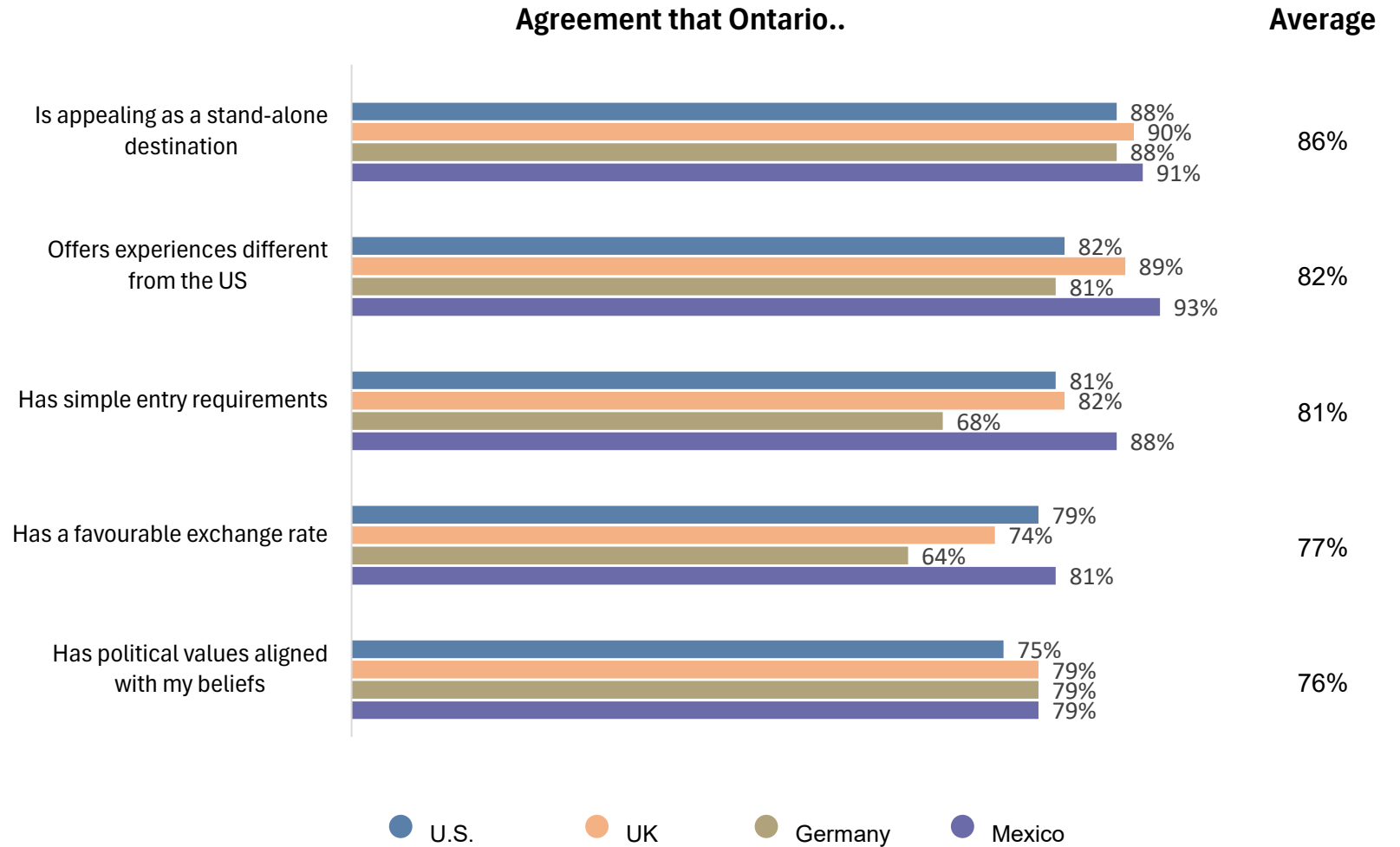
PERCEPTIONS OF ONTARIO – INTERNATIONAL MARKETS

Among international markets, Ontario is broadly seen as a compelling stand-alone destination that offers experiences genuinely different from the United States.

Entry requirements are seen as straightforward by most markets, though Germany rates this noticeably lower, suggesting a potential friction point worth addressing through clearer communications.

The favourable exchange rate is recognised across markets but less so by Germany. Political values alignment scores consistently across all four international markets.

Mexico leads on all dimensions, especially that Ontario offers distinctly non-American experiences.



P2A Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 P2B Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 P2A Respondents from Canada or aware of Ontario, Canada (n=2,161)/ P2B Respondents from Canada or aware of Ontario, Canada (n=2,902)

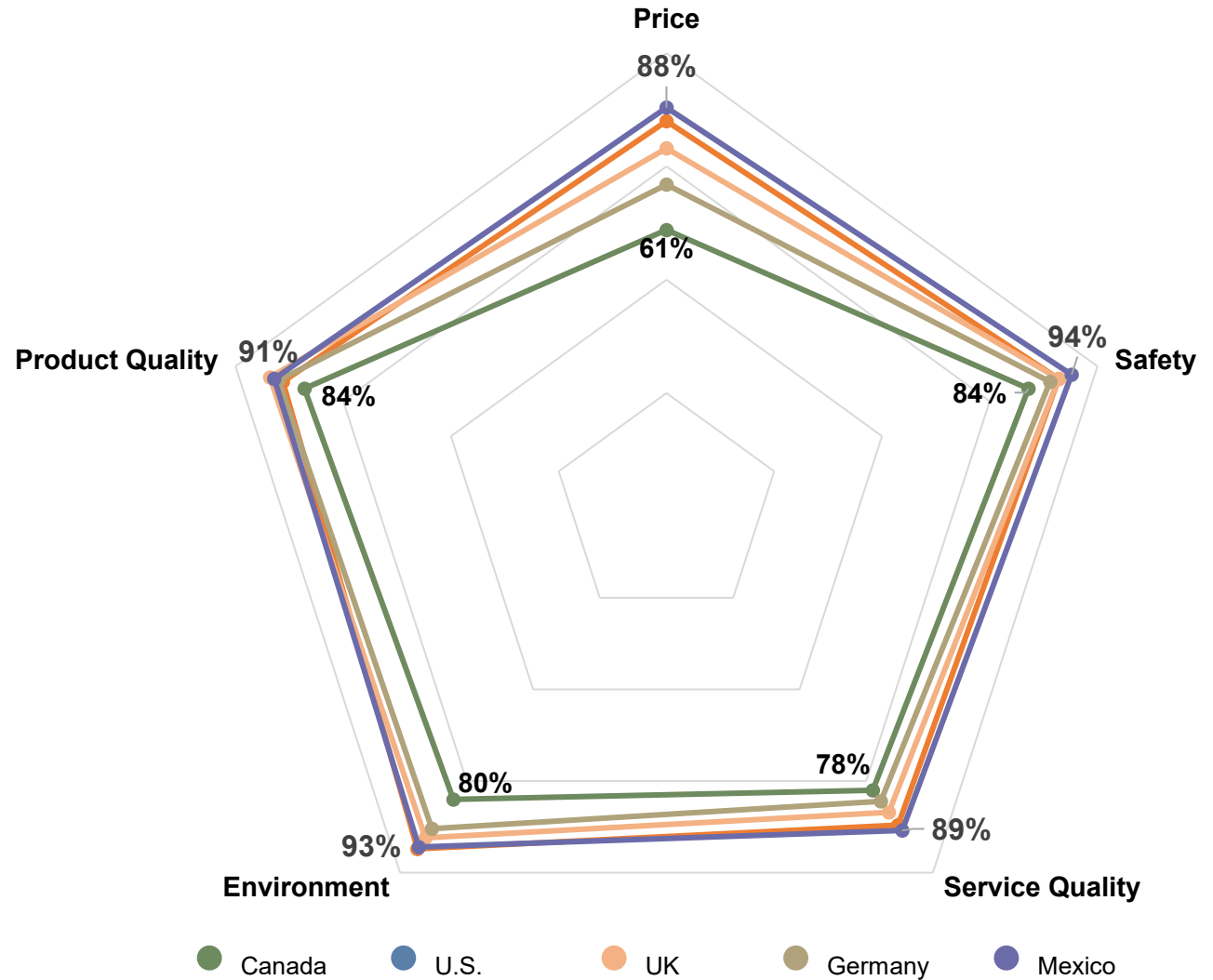
CONSUMER PERCEIVED VALUE OF ONTARIO

Ontario's perceived value profile is strong across all five dimensions, with safety, environment, and product quality emerging as the province's most universally recognized strengths.

Safety and environment score at the top across all markets, with Mexico and the UK rating both dimensions exceptionally highly.

Product quality and service quality are also well-regarded internationally, with all non-Canadian markets clustering tightly together at strong levels.

Price is where the most notable divergence appears: international markets rate Ontario's value favourably, while Canadian domestic respondents score it considerably lower.



P2A Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 P2A Respondents from Canada or aware of Ontario, Canada (n=2,161)



SAFETY, INCLUSION, AND TRUST

Ontario holds a significant inclusivity advantage over the U.S. across all markets. The signals that build trust with 2SLGBTQI+ travellers are clear and consistent.

Most 2SLGBTQI+ travellers **feel comfortable being open about their identity when travelling**, though comfort varies across markets and identity groups. Comfort rises consistently with stronger Ontario intent, suggesting Ontario is already resonating with the more comfort-confident traveller.

When choosing destinations, **travellers prioritize structural signals first**, such as legal protections, community attitudes, and political and social climate. Operational signals, such as staff training, accreditation and visible Pride symbol, form a second tier and helps build confidence in a destination. When looking at what drives travel intent to Ontario the most, community attitudes, visible community presence, and accreditation programs are the signals most strongly associated with Ontario consideration.

Ontario is seen as significantly more welcoming and inclusive than the U.S. across every market tested. Among those who view Ontario as welcoming, more than three quarters are likely to visit. Safety perceptions are broadly positive across all destination types.

Most respondents say they would **choose a safer, more inclusive destination even at higher cost**, and those who prioritize value-aligned destination choice are more likely to be considering Ontario. Trust in a destination is shaped by a consistent set of concerns across all markets. Discrimination reports, restrictive laws, and harassment concerns rank highest among the factors that would reduce it.

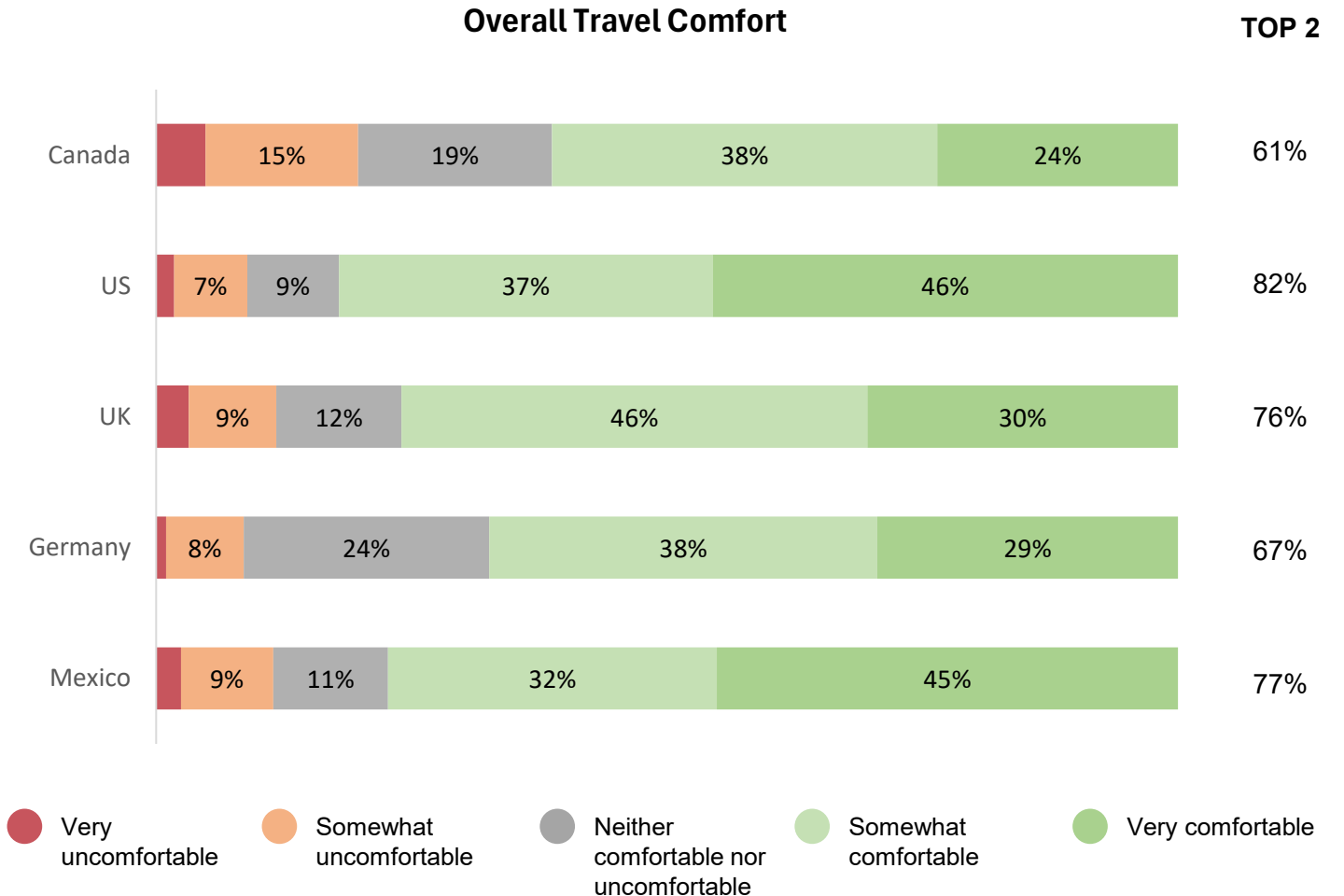
OVERALL TRAVEL COMFORT

Three quarters of 2SLGBTQI+ travellers feel comfortable being open about their identity when travelling, though comfort varies across markets and groups.

U.S. markets report the highest comfort levels, followed by Mexico and UK. Canadian domestic respondents are the least comfortable of any market, a pattern that is consistent across all four Canadian sub-markets.

By identity, gay and bi+ men are the most comfortable, while lesbian and bi+ women sit notably lower. Trans or non-binary respondents fall between the two groups.

Comfort also rises consistently with stronger Ontario intent, making travel comfort one of the stronger individual predictors of Ontario consideration in the study.



S1 Overall, how comfortable do you feel being open about your identity when travelling? All respondents. (n=3,475)

WHAT INCLUSION SIGNALS MATTER MOST

When choosing a destination, 2SLGBTQI+ travellers apply a clear two-tier hierarchy of inclusion signals.

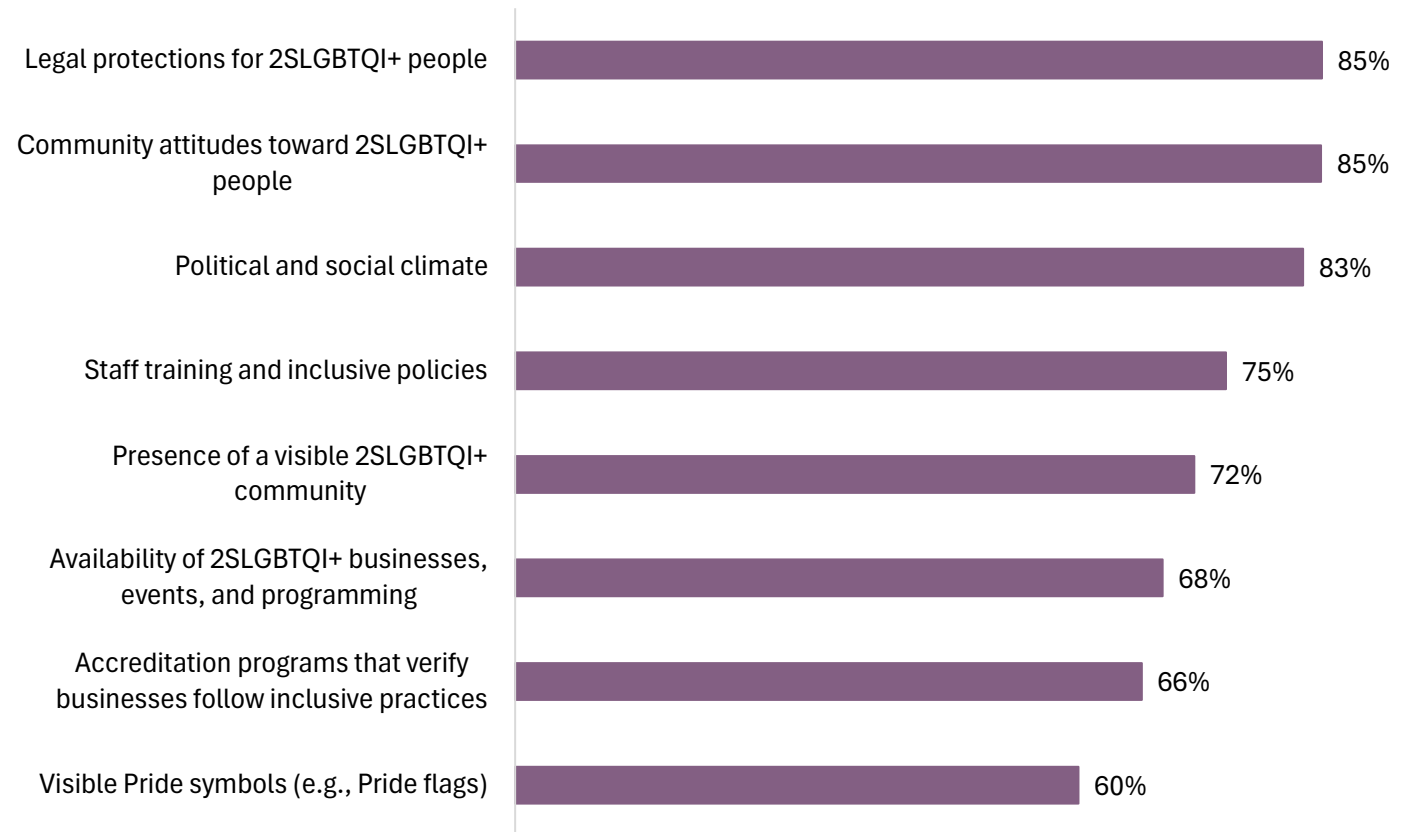
Structural factors are most important. Legal protections, community attitudes, and political and social climate sit at the top of the ranking across all markets and identity groups.

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

Travellers who find community attitudes, visible community presence, and accreditation programs important are considerably more likely to be considering Ontario than those who do not.

Despite ranking sixth in overall importance, accreditation emerges as one of the strongest drivers of Ontario consideration.

What Inclusion Signals Matter Most



S2 How important are the following when choosing a leisure travel destination?
All respondents. (n=3,310)

ONTARIO & U.S. INCLUSIVITY

When asked whether each destination is currently welcoming and inclusive to 2SLGBTQI+ visitors, Ontario scores nearly 40 points above the U.S. across the total sample.

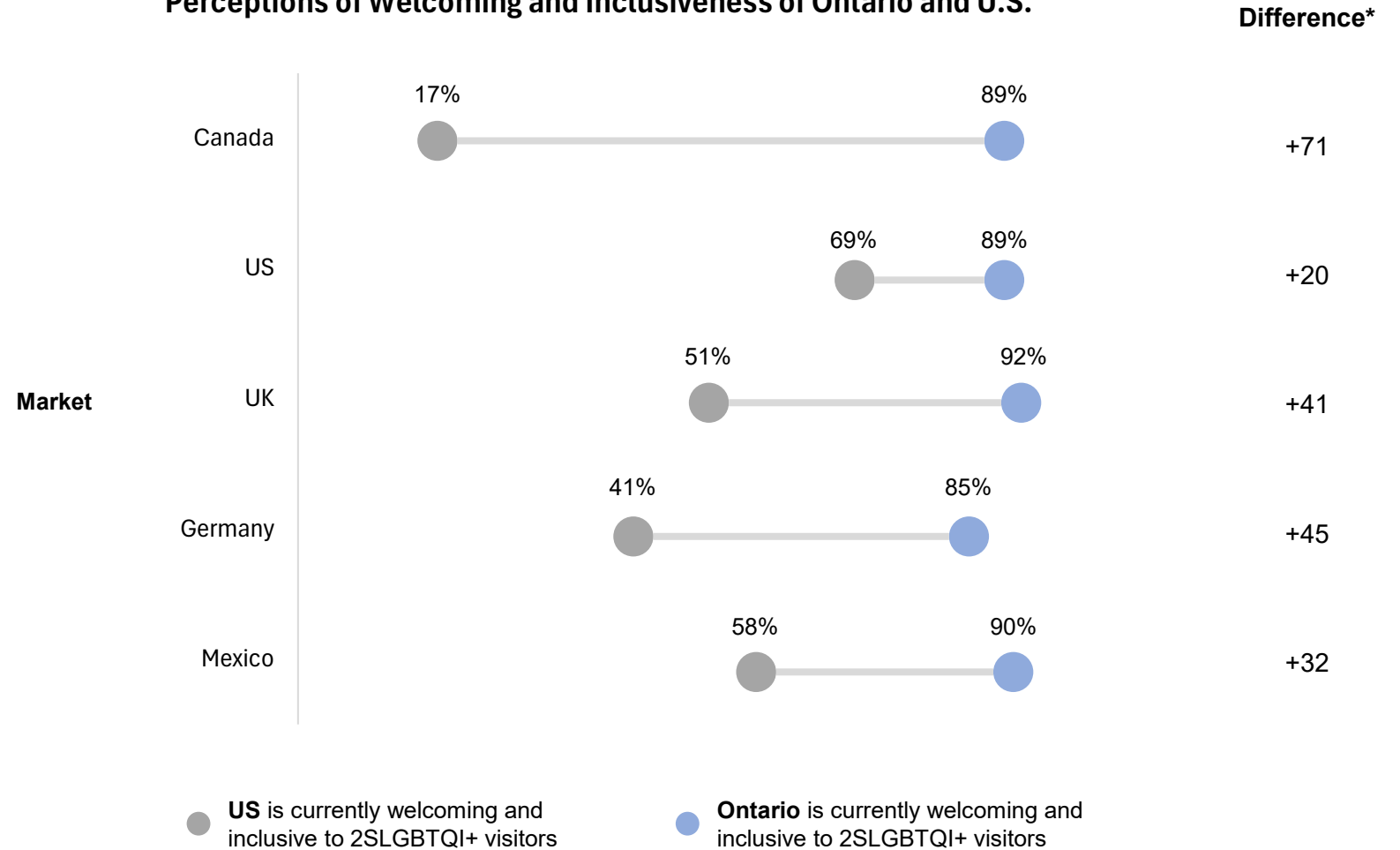
This gap holds consistently across every market tested, including among U.S. respondents rating their own country.

The contrast is sharp for trans or non-binary respondents, where the gap between Ontario and the U.S. reaches 32 points.

Perception and intent are directly linked. Among those who view Ontario as welcoming and inclusive to 2SLGBTQI+ visitors, more than three quarters are likely to visit Ontario in the next two years.

*Difference = Ontario minus US

Perceptions of Welcoming and Inclusiveness of Ontario and U.S.



P3 For each of the following destinations, how much do you agree or disagree with the following statement: "This destination is currently welcoming and inclusive to 2SLGBTQI+ visitors." Respondents from Canada or aware of Ontario, Canada. (n=3,142)

SAFETY PERCEPTIONS OF ONTARIO

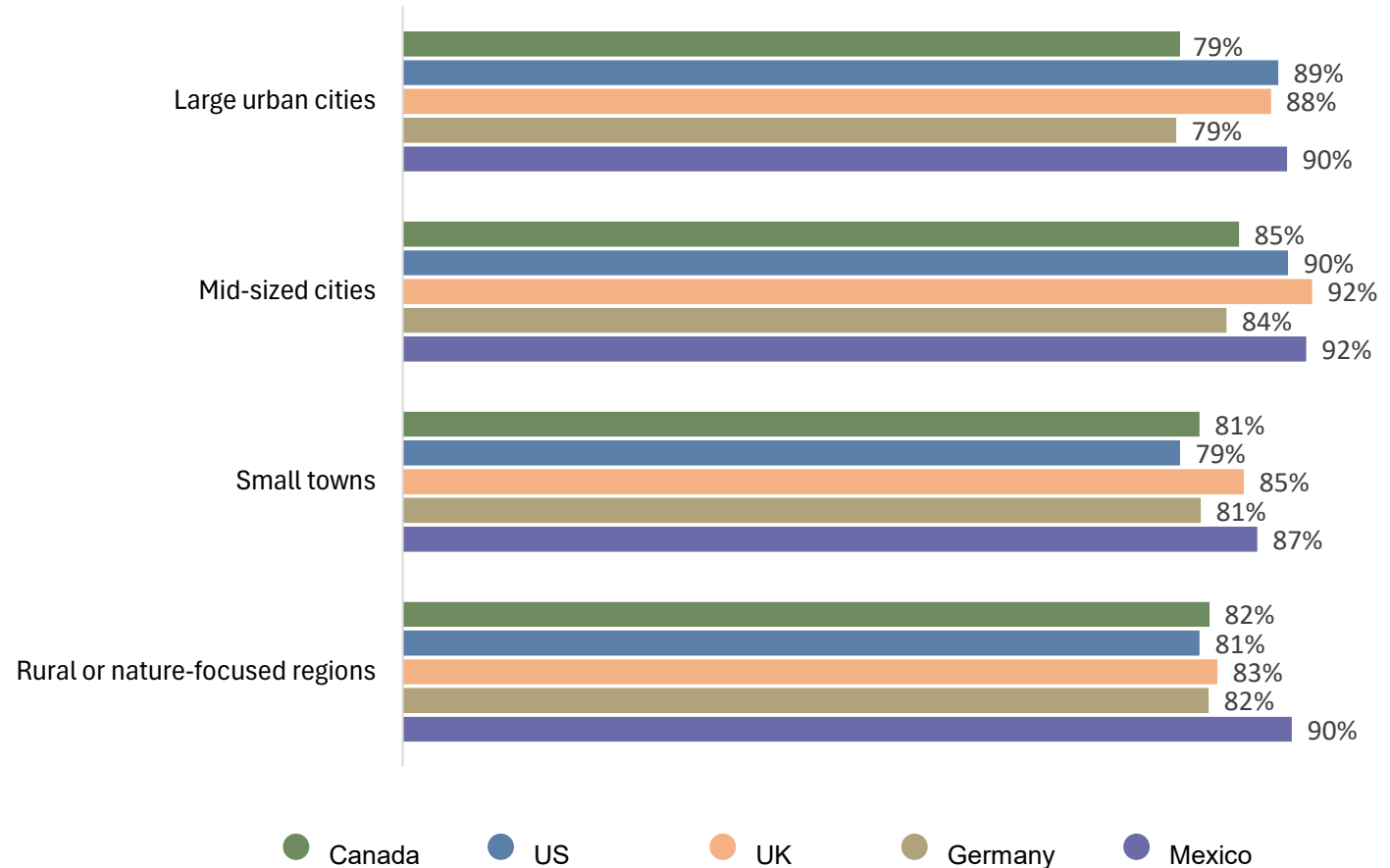
Ontario is seen as a safe destination for 2SLGBTQI+ travellers across all destination types, with especially strong confidence among international markets.

Safety perceptions are broadly positive across all four destination types. Large urban cities, mid-sized cities, small towns, and rural regions all rate above 80% overall. Safety is perceived as a province-wide attribute rather than something confined to major urban centres.

International markets consistently rate Ontario higher than Canadian domestic respondents across all destination types.

While safety perceptions remain high across all groups, younger travellers and BIPOC respondents rate small towns and rural areas comparatively lower than other segments though still well above 75%.

Perceptions of Safety- Ontario



P4 How safe would you feel visiting the following areas in Ontario, Canada?
 Respondents from Canada or aware of Ontario, Canada. (n=3,272)

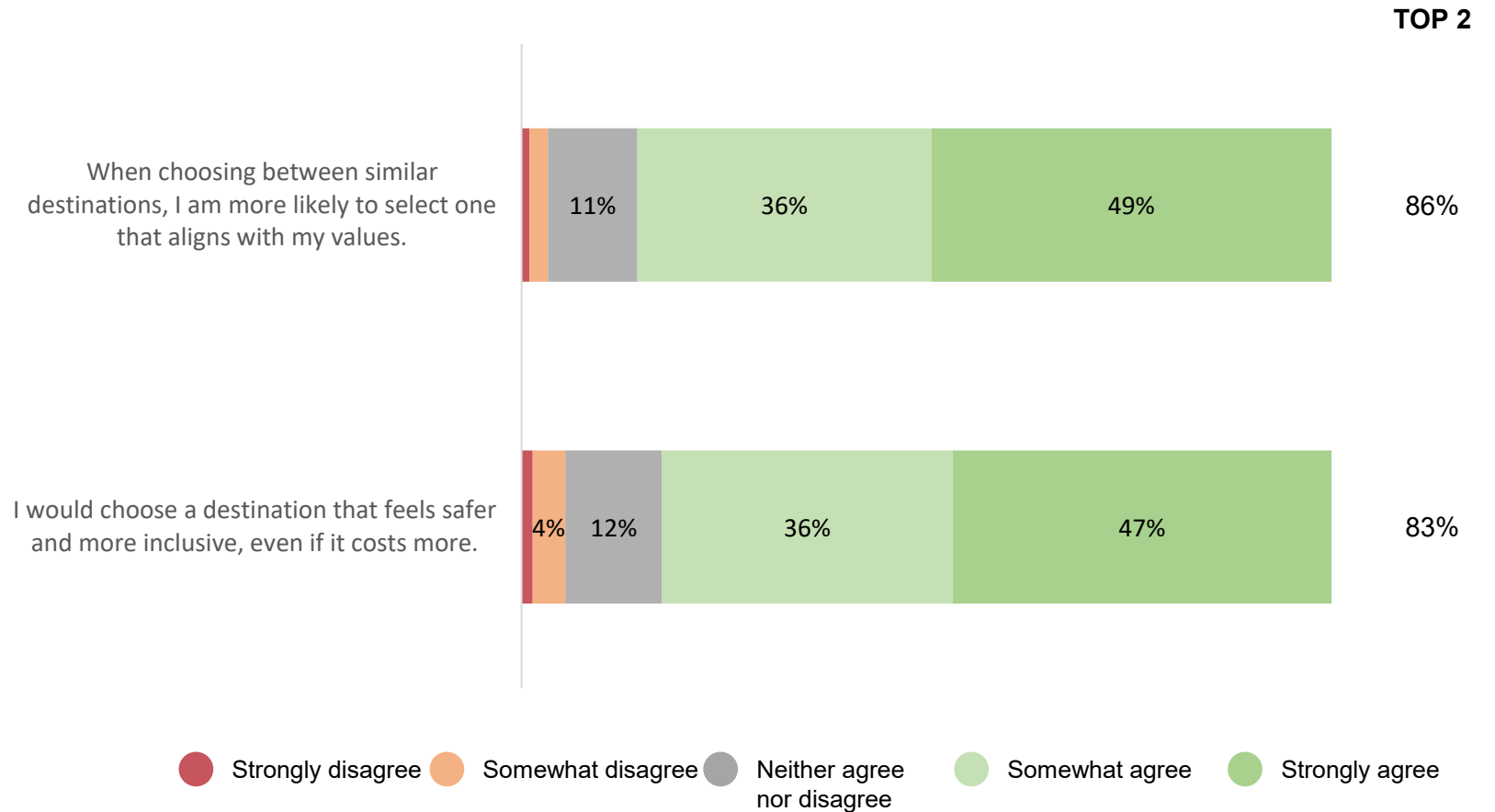
CHOOSING DESTINATIONS ON VALUES

Most 2SLGBTQ+ travellers say they would choose a destination that feels safer and more inclusive even if it costs more, and an even larger share say they are more likely to select a destination that aligns with their values when choosing between similar options.

Both statements show consistent agreement across all markets and identity groups.

Those who prioritize safer and more inclusive destinations are also more likely to be considering Ontario than those who do not, a consistent relationship that holds across both statements.

Choosing Destinations on Values



S4 How much do you agree or disagree with the following statements?
All respondents. (n=1,196)

U.S. POLITICAL CLIMATE

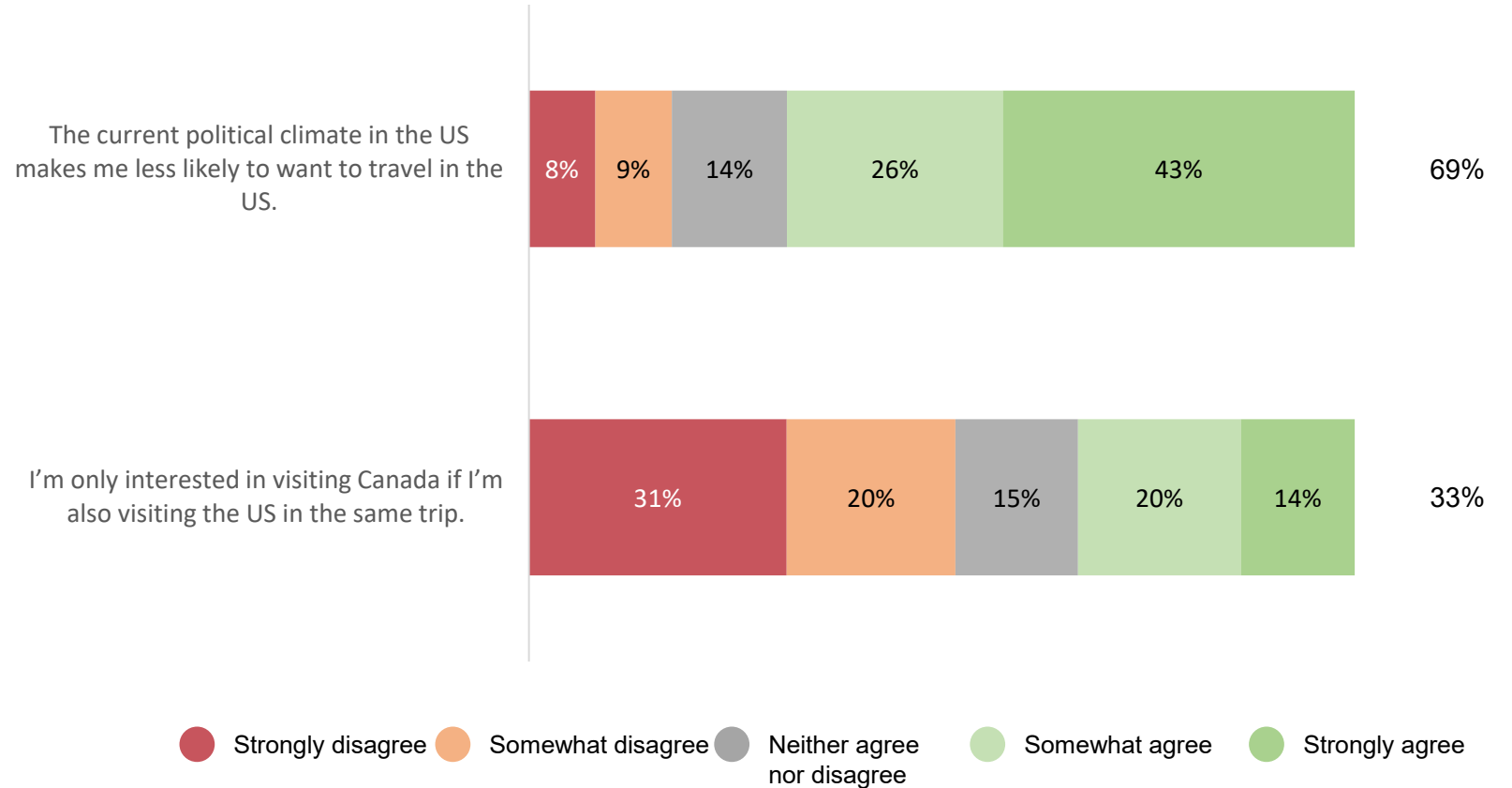
Most respondents agree that the current U.S. political climate makes them less likely to travel within the U.S. Canada and Mexico show the strongest agreement of any markets.

Lesbian and bi+ women and trans or non-binary respondents agree more strongly than gay and bi+ men. Past Ontario visitors agree more strongly than non-visitors, suggesting that familiarity with Ontario sharpens the perceived contrast with the U.S.

Among international respondents, only about a third say they would visit Canada exclusively in combination with a U.S. trip, indicating that standalone Ontario travel is something this audience is open to.

U.S. Political Climate

TOP 2



S4 How much do you agree or disagree with the following statements? All respondents. (n=1,196)

WHAT ERODES TRUST

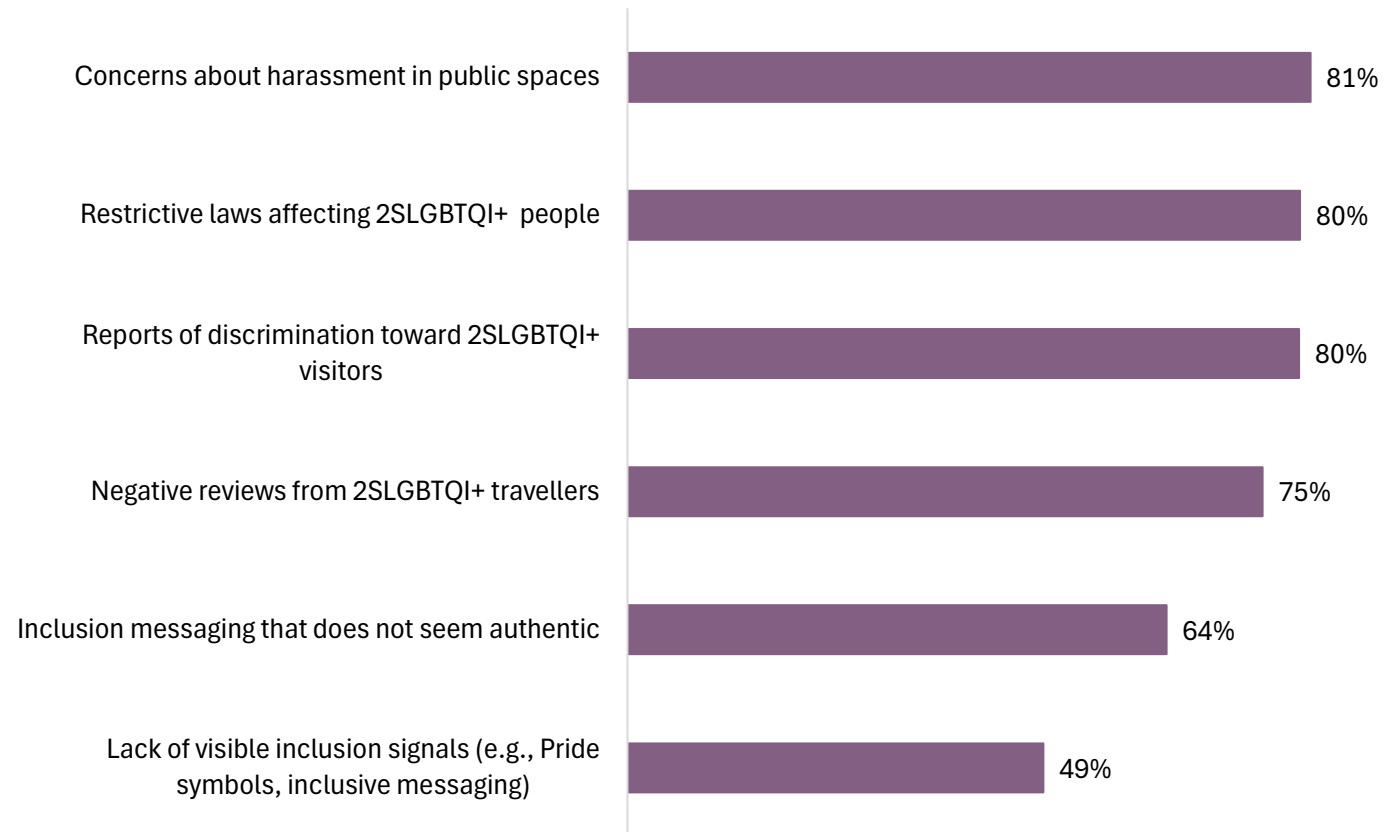
When asked which factors would reduce their trust in a destination, 2SLGBTQI+ travellers identify a consistent set of concerns across all markets.

Concerns about harassment in public spaces, restrictive laws affecting 2SLGBTQI+ people, and reports of discrimination toward 2SLGBTQI+ visitors rank highest.

Performative or inauthentic inclusion messaging reduces trust for nearly two thirds of respondents. Lack of visible inclusion signals registers lower than the other factors, suggesting that authenticity of welcome carries more weight than volume of symbols.

Trans or non-binary and BIPOC respondents rate every trust factor higher than the total sample.

Factors that Reduce Trust in a Destination



S5 How much do you agree or disagree that each of the following would reduce your trust in a destination?
All respondents. (n=3,309)



PRIDE AND EVENT-LED TRAVEL

Event-led travel is a motivator for 2SLGBTQI+ travellers. Pride is of the primary draws, but interest in the broader 2SLGBTQI+ event calendar extends well beyond the summer peak.

More than six in ten 2SLGBTQI+ travellers say they are likely to take a leisure trip specifically to attend a 2SLGBTQI+ event. Large urban cities are the preferred destination type overall, though rural and nature-focused regions, mid-sized cities, and small towns all register meaningful interest, particularly among lesbian and bi+ women and trans or non-binary respondents.

Pride Toronto is known to roughly half the respondents, though most who know of it are unaware of its scale as one of the world's largest Pride festivals. Past Ontario visitors show higher Pride awareness than non-visitors, indicating that familiarity with Ontario builds Pride awareness alongside general destination knowledge. About 4 in 10 respondents intend to travel specifically for a large-scale Pride event, rising considerably among those already likely to visit Ontario. Planning windows are short where most decide within one to three months, with Germany the exception, where nearly half plan four to six months out.

Nearly all Pride-attending likely visitors say they would explore beyond the host city during their trip, with regional consideration for Toronto, Niagara and Ottawa. The dispersal intent is also present across all markets and identity groups. About half of all respondents would also travel to Ontario for non-Pride 2SLGBTQI+ events, with trans or non-binary respondents and U.S. and Mexico markets leading. Taken together, the data points to an event-led travel opportunity in Ontario that extends across the calendar, beyond Toronto, and beyond Pride season.

GENERAL EVENT AND DESTINATION MOTIVATIONS

Taking a leisure trip specifically to attend a 2SLGBTQI+ event is a likely or very likely activity for most respondents across the total sample.

Intent is highest among trans or non-binary respondents and varies by market, with some international markets showing above-average event travel motivation.

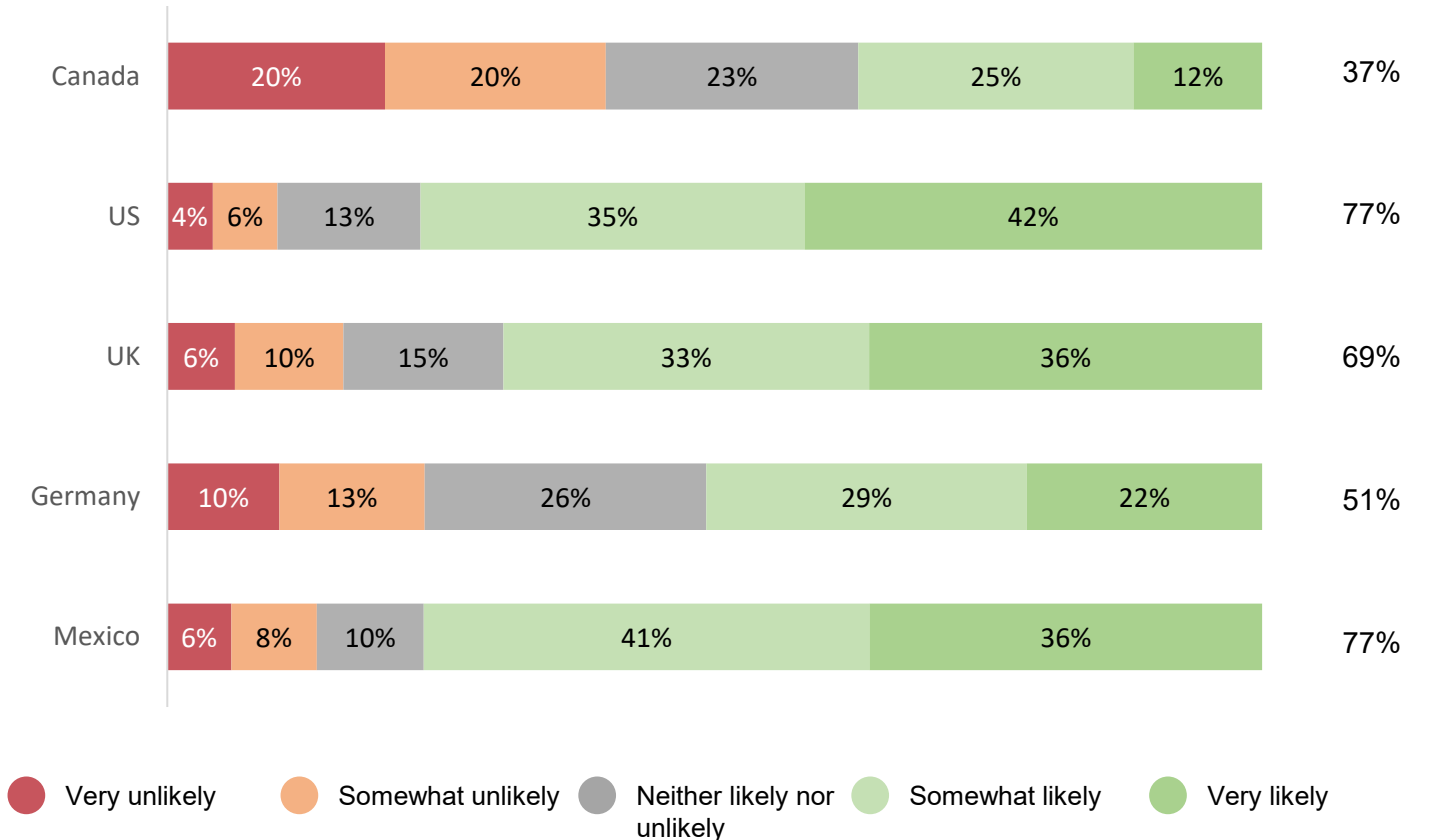
Destination type preferences for general leisure travel show large urban cities as the clear leader, though interest in non-urban settings is real and distributed across all markets and identity groups.

Rural and nature-focused regions, mid-sized cities, and small towns all register meaningful interest.

Lesbian and bi+ women show above-average interest in rural and nature settings relative to gay and bi+ men. Trans or non-binary respondents show above-average interest in mid-sized cities and small towns relative to the total sample.

Likelihood of Taking a Trip to Attend a 2SLGBTQI+ Event

TOP 2



M2 Which types of destinations generally interest you most for leisure travel?
 M3 How likely are you to take a leisure trip specifically to attend a 2SLGBTQI+ event?
 M2 All respondents. (n=3,424)/ M3 All respondents. (n=3,443)

PRIDE AWARENESS IN ONTARIO

Pride events in Ontario enjoy meaningful awareness among 2SLGBTQ+ travellers, though depth varies by market.

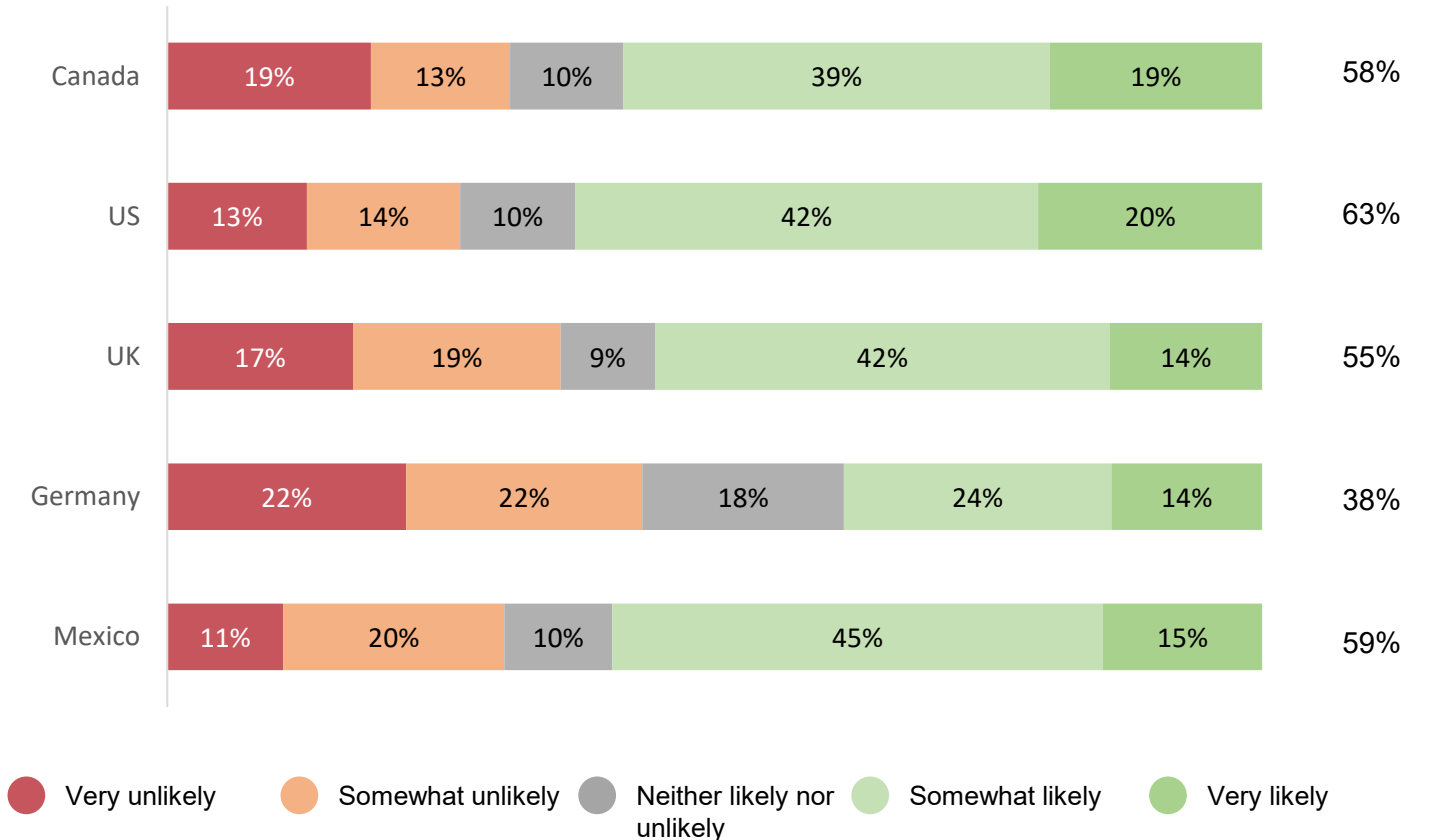
Pride Toronto specifically is known to roughly half the total sample before the survey. Among those aware of Pride Toronto, just over a third already knew it attracts over 3 million attendees annually, meaning the majority of even those who knew of Pride Toronto were unaware of its scale.

Awareness of Pride Toronto's size is lowest in international markets, particularly Germany and UK.

Past Ontario visitors show higher Pride awareness than non-visitors indicating that familiarity with Ontario builds Pride event awareness alongside general destination knowledge.

Awareness of Ontario Pride Events

TOP 2



PR1 How aware are you of any Pride events in Ontario, Canada?

PR1A Before today, were you aware of Pride Toronto?

PR1B Before today, were you aware that Pride Toronto is one of the largest Pride festivals globally, attracting over 3 million attendees annually?

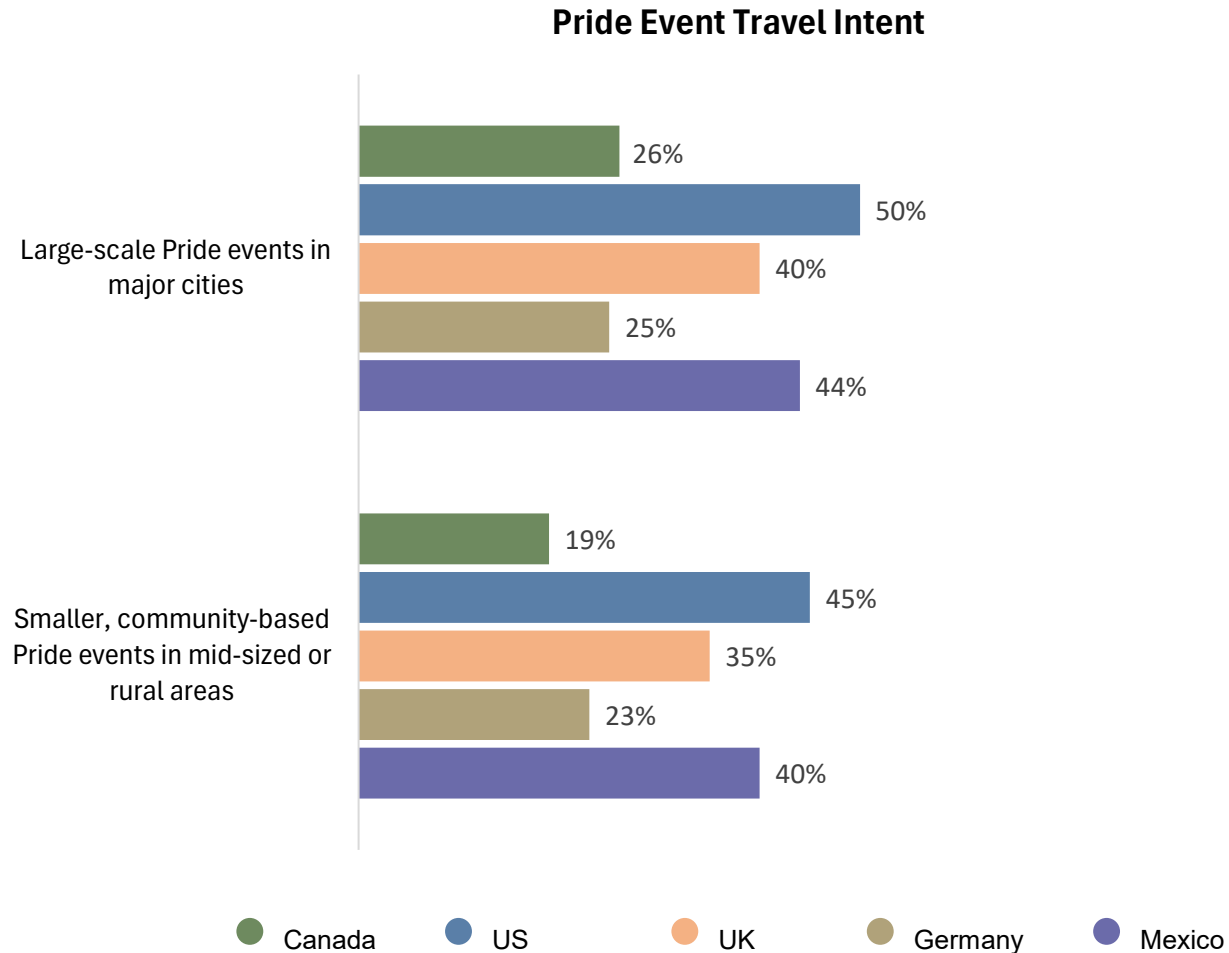
PR1 Respondents from Canada or aware of Ontario, Canada. (n=3,408)/ PR1A Respondents aware of Pride events. (n=1,967)/ PR1B Respondents aware of Pride Toronto. (n=1,628)

PRIDE EVENT TRAVEL INTENT

About 4 in 10 2SLGBTQI+ travellers across all markets intend to travel specifically for a large-scale Pride event, and slightly fewer for a community-based Pride event.

Among those who are already likely to visit Ontario and are aware of Ontario Pride events, intent is considerably higher on both formats.

Large-scale Pride events lead over community events consistently across every market. Trans or non-binary respondents show the strongest intent for both formats of any identity group. Canada and Germany are the lowest of any markets on both.



PR2 How likely are you to take a trip to Ontario, Canada to specifically attend each of the following types of Pride events?
Rebased to total sample. (n=3,488)

PRIDE PLANNING LEAD TIMES

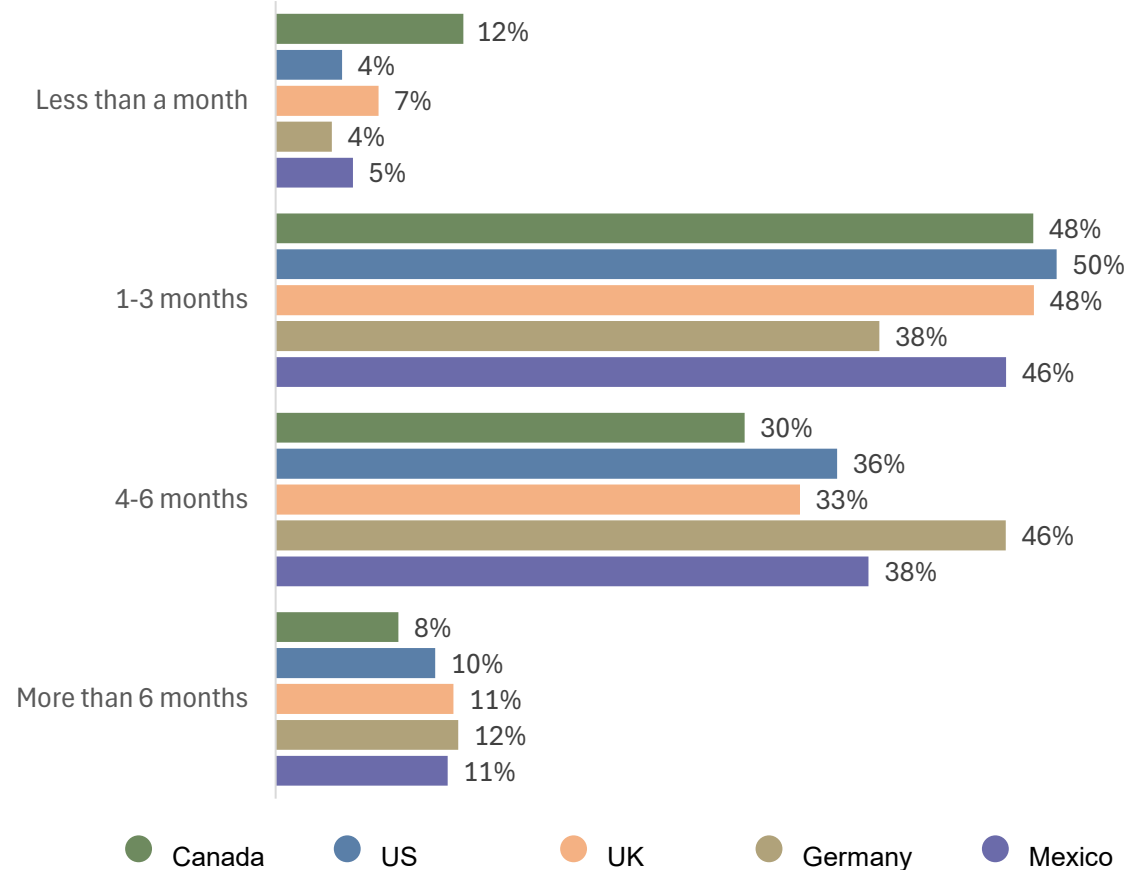
Pride travel is not planned too far in advance.

Nearly half of Pride-motivated likely visitors plan their trip one to three months ahead, and just over a third plan four to six months out. Less than one in ten plan more than a year in advance.

Germany is the notable market exception where nearly half of German respondents plan four to six months out, the highest of any market on this planning horizon. Mexico and U.S. markets are more concentrated in the one to three month window.

Lesbian and bi+ women plan slightly further in advance than gay and bi+ men, with a higher share in the seven to twelve month window.

Months in Advance to Plan



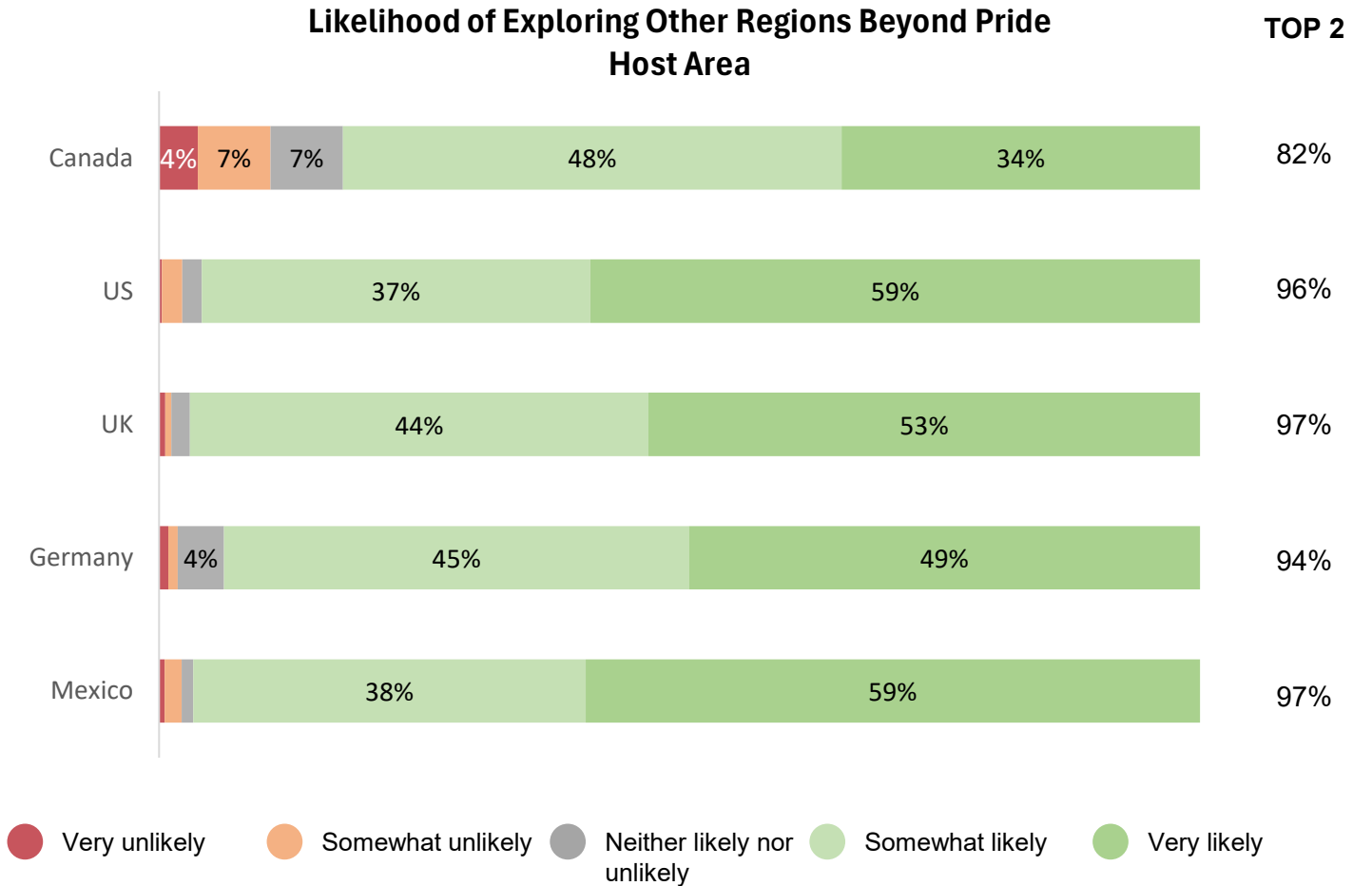
PR3 How far in advance would you plan a trip to attend a Pride event in Ontario? Respondents likely to attend Pride. (n=1,440)

REGIONAL DISPERSION DURING PRIDE TRIPS

Nearly all Pride-attending likely visitors say they would explore regions beyond the Pride host area during their trip, a finding that is consistent across all markets and identity groups.

Among those who say they are likely to explore regions beyond the Pride host area, Toronto, Niagara and Ottawa are the most popular destinations for a trip in Ontario.

Germany and Mexico show the highest very likely dispersal rates of any markets. U.S. Drive respondents also show above-average dispersal intent.

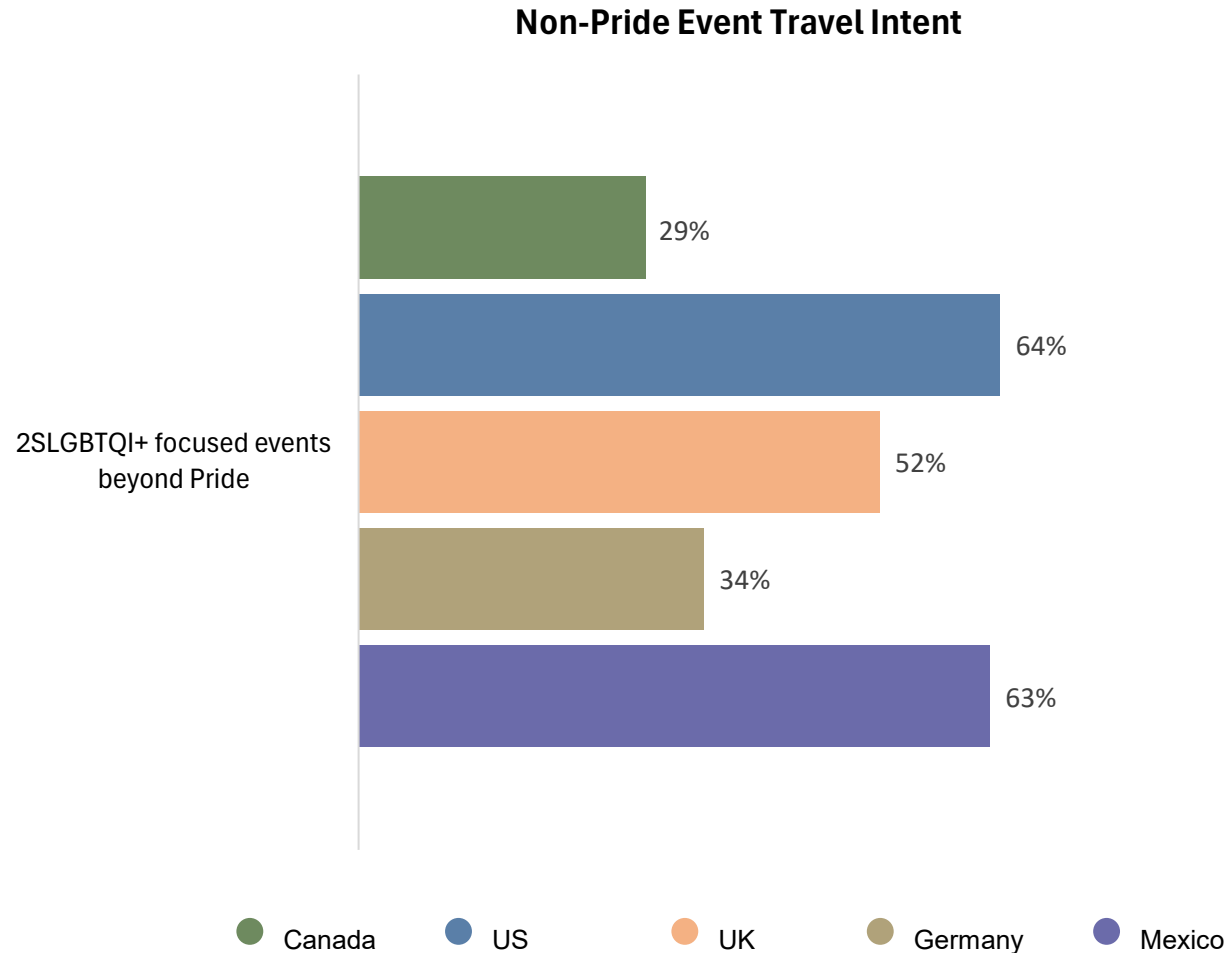


PR4 During a Pride-focused trip to Ontario, how likely would you be to explore other regions or destinations beyond the host area? (Among those likely to take a trip to Ontario for a Pride event)
 T6B Which destinations in Ontario would you consider visiting during this trip? Please select all that apply
 PR4 Respondents likely to attend Pride. (n=1,436) / T6B Respondents who are likely to take an overnight leisure trip in Ontario, Canada. (n=2,327)

BEYOND PRIDE: NON-PRIDE EVENT TRAVEL

About half of all 2SLGBTQI+ travellers say they would take a trip to Ontario to attend non-Pride 2SLGBTQI+ events such as queer film festivals, drag festivals, arts programming, and queer outdoor experiences.

Interest is strongest among trans or non-binary respondents, who are considerably above the total sample. U.S. and Mexico respondents show the highest market-level intent.



PR5 How likely are you to take a trip to Ontario, Canada to attend other 2SLGBTQI+ focused events beyond Pride (e.g., queer film festivals, drag festivals, arts or cultural programming, queer-led outdoor experiences)? Rebased to total sample. (n=3,488)



BARRIERS, CHANNELS, AND MESSAGING

The barriers to visiting Ontario, the channels travellers use for inspiration, and the messaging that influences their decisions all vary by market.

Cost is the dominant barrier for Canadian domestic respondents, while **safety concerns and not feeling welcome are the barriers more strongly associated with international markets**. Among travellers who find accreditation important, it is cited at more than double the rate of those who do not, pointing to a direct relationship between visible inclusion certification and this specific barrier.

General internet search, social media, and friends and family are the top inspiration channels overall, though the balance shifts by market. 2SLGBTQI+-specific travel media reaches a large share of respondents and ranks among the top trusted sources.

On messaging, **2SLGBTQI+ travellers respond to a combination of factors such as clear signals of welcome, genuine representation, respectful language, and peer reviews** from other travellers all matter. Those likely to attend 2SLGBTQI+ events in Ontario place considerably more weight on authentic representation and peer reviews than those who are not, making authenticity and community voice the most important messaging factors for this audience specifically.

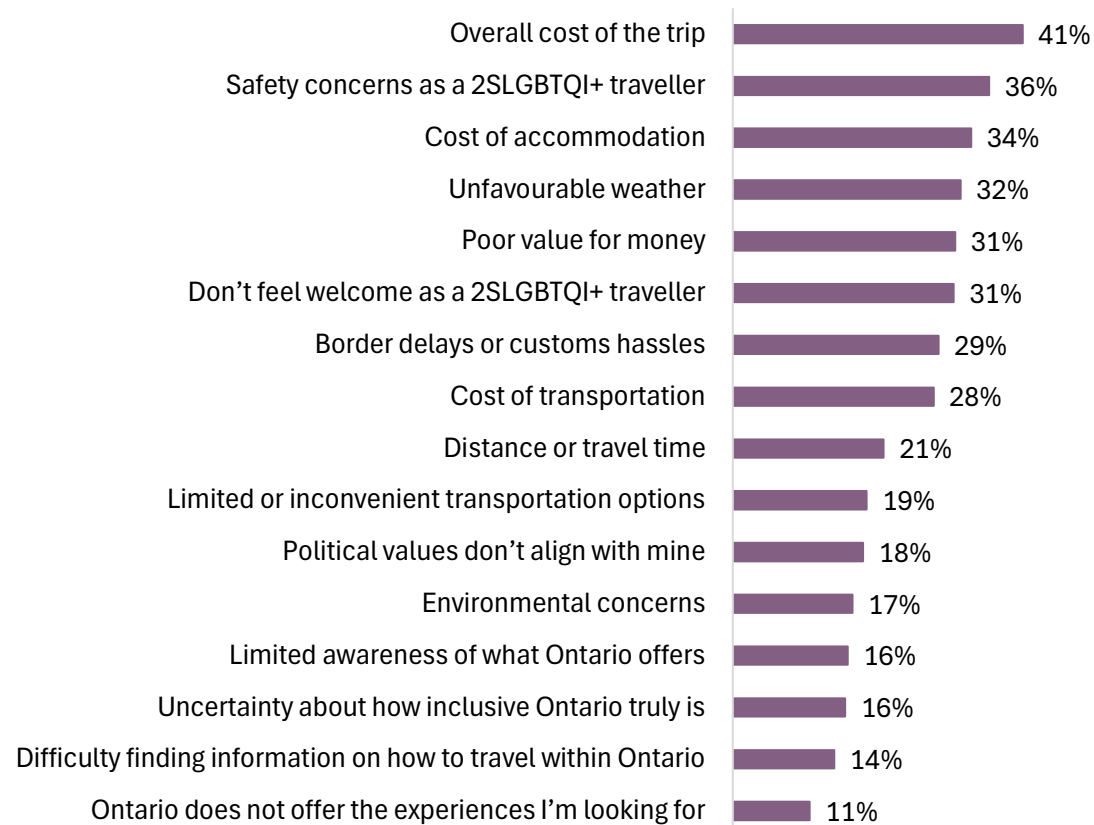
BARRIERS

The barriers to visiting Ontario vary considerably by market. Cost is the dominant concern for Canadian domestic respondents, where accommodation costs compound the overall price concern. For international markets, cost registers much lower as a deterrent.

When crossed against Ontario intent, safety concerns and not feeling welcome as a 2SLGBTQI+ traveller show the largest gaps between likely and unlikely visitors. These are the two barriers most strongly associated with low Ontario consideration.

Among travellers who find accreditation programs important, not feeling welcome is cited at more than those who do not find accreditation important, suggesting a relationship between visible inclusion certification and feeling welcomed.

Factors that Might Discourage Ontario Travel



B1 Which of the following factors would discourage you the most from visiting Ontario, Canada?
All respondents. (n=2,505)

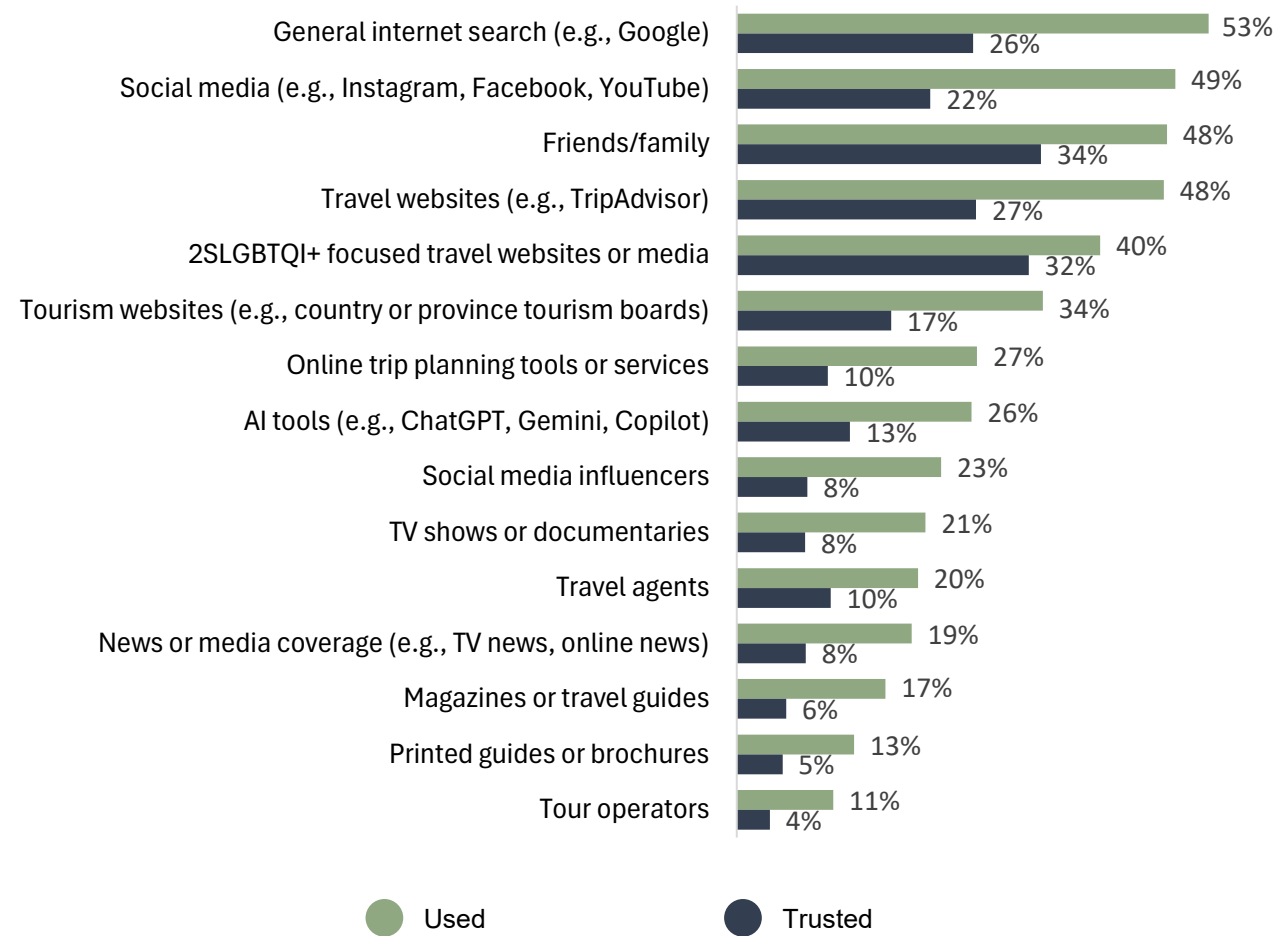
SOURCES OF INSPIRATION

General internet search is the top inspiration source across all markets, followed closely by social media and friends and family.

2SLGBTQI+-specific travel media is used by roughly four in ten respondents overall and ranks among the top trusted sources.

Friends and family remains one of the most trusted sources across all markets and is highest where existing Ontario visitation is strongest.

Sources of Information Used and Trusted



C1 Where do you typically look for travel inspiration? Please select all that apply

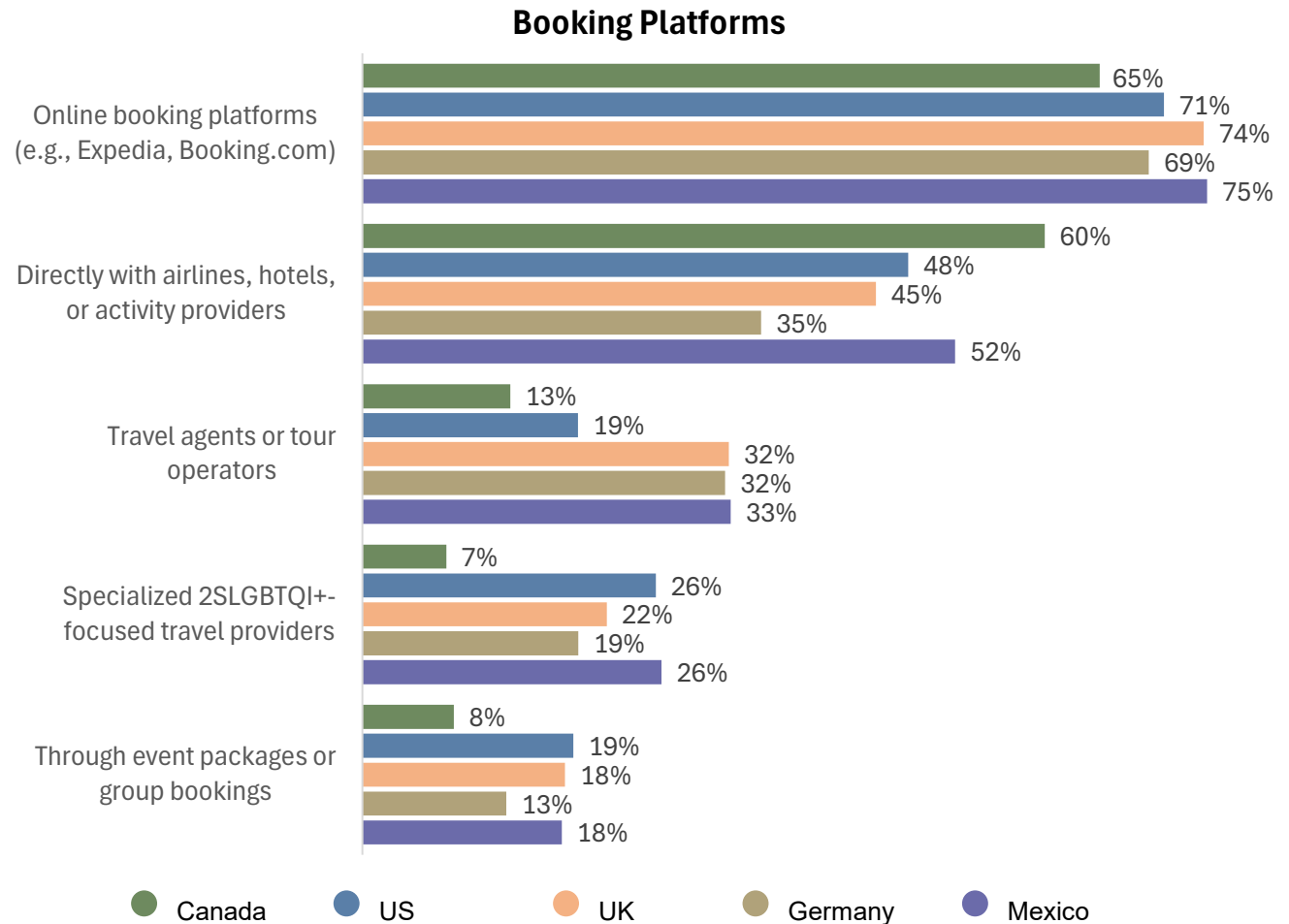
C2 Which sources do you trust most? Please select all that apply.

C1 All respondents. (n=3,460)/ C2 Respondents who selected more than one travel inspiration source. (n=3,254)

HOW TRAVELLERS BOOK

Direct booking with airlines, hotels, and activity providers is the dominant pathway overall and is consistent across most markets. Online travel agencies are used by approximately half of respondents.

Travel agents are used by a notably higher share of respondents in international markets than the overall average.



C3 How do you typically book your travel?
All respondents. (n=3,439)

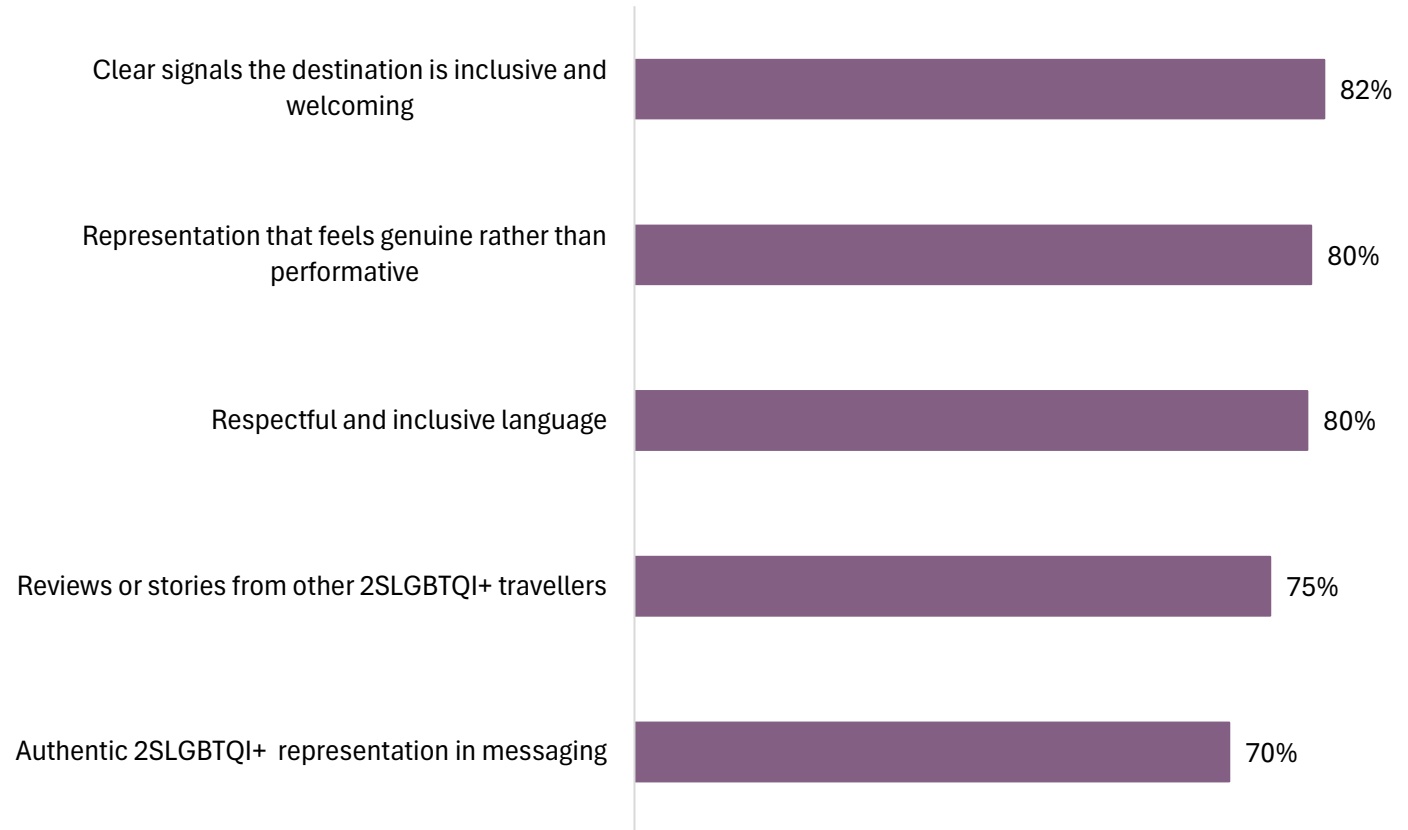
Clear signals that the destination is inclusive and welcoming rank highest among the five attributes.

This followed closely by genuine rather than performative representation, respectful and inclusive language, peer reviews from other 2SLGBTQI+ travellers, and authentic representation in creative.

Those who are likely to attend 2SLGBTQI+ events in Ontario place considerably more weight on authentic representation and peer reviews than those who are not. For this audience, seeing genuine community representation and hearing from other travellers tend to matter more.

Trans or non-binary respondents rate every attribute above the total sample, with the largest gaps on authentic representation and genuine versus performative framing.

Influential Messaging Factors



C4 How influential are the following in shaping your decision to choose a destination? All respondents. (n=3,389)

APPENDIX: 2SLGBTQI+ GENERAL TRAVELLER PROFILE

2SLGBTQI+ travellers across all markets are **similarly active in how frequently they take leisure trips**, but the value they deliver varies considerably depending on where they come from. **International travellers stay significantly longer** and **spend far more per trip**.

Planning horizons tend to be **short to mid-range** across the board. Canadian travellers are the most last-minute for domestic trips, while U.S. travellers plan furthest in advance for international trips. UK, Germany, and Mexico cluster closely together with a mix of short and medium planning windows. Notably, **travellers who have previously visited Ontario** tend to **plan with less lead time** than first-time visitors.

Trip purposes differ meaningfully by market, but a useful **distinction** emerges **between markets where identity-specific motivations lead and those where broader destination experiences dominate**. **U.S., UK, and Mexican travellers** are the most explicitly **identity-driven**, with exploring 2SLGBTQI+ culture, nightlife, and community spaces ranking at or near the top of their purpose lists, alongside strong interest in city exploration and iconic landmarks. **Canadian and German travellers**, by contrast, **anchor their trips in classic leisure motivations** including city exploration, natural scenery, and relaxation, with community-specific experiences present but playing a more complementary role.

Across all markets, summer dominates the leisure travel calendar, though Mexico shows stronger orientation toward December travel.



GENERAL TRAVEL: TRIP FREQUENCY, STAY, AND SPEND PER YEAR

2SLGBTQI+ travellers across key markets are equally active in how often they take leisure trips, but international markets deliver significantly more value through longer stays and higher spend per trip.

Despite similar annual trip frequency, domestic Canadian trips are shorter stays within Canada, while international markets show longer-haul international trips that average 5.5–7.0 nights.

Canadian 2SLGBTQI+ travellers are taking domestic leisure trips that average \$1,352, while international trips from the U.S., the UK, and Mexico are worth several times more per visit.

While younger people (25-34) are likely to take more trips per year, older ones (55-64) are likely to stay longer within a single trip.

**Canadian travellers were asked about their domestic trips, while U.S. and international travellers were asked about international trips.*

	Average Number of Leisure Trips Per Year	Average Number of Nights Per Trip	Spend Per Trip (CAD)
Canada (domestic)*	2.2	3.5	\$1,352
Ontario	2.0	3.5	\$1,328
Quebec	2.3	3.8	\$1,152
Atlantic Canada	2.2	3.1	\$1,538
Western Canada	2.3	3.5	\$1,512
U.S.	2.3	5.5	\$6,000
U.S. Drive	2.1	5.5	\$5,918
U.S. Fly	2.4	5.5	\$6,043
International	2.5	7.0	\$4,573
UK	2.6	7.0	\$5,172
Germany	2.5	8.4	\$3,664
Mexico	2.3	5.5	\$4,882

Q1 How many domestic/ international leisure trips involving at least one overnight stay do you typically take in a year?

Q3 How many nights do you typically stay on a domestic/ an international overnight leisure trip?

Q5 (CAD) Approximately how much do you typically spend on a domestic/ an international leisure trip? Please consider the total cost for everyone in your travel party. Your best estimate is fine. (Excluding airfare and pre-trip shopping)

Q1/Q3 All respondents. (n=3,488)/ Q5 All respondents. (n=3,487)

GENERAL TRAVEL: TRAVEL COMPANIONS AND DECISION ROLES

2SLGBTQI+ travellers are more likely to be the primary decision makers on the trip and typically travel with a small group.

Across markets, they typically travel with around two companions, with Mexican travellers at the higher end of the range and Canadian travellers slightly lower.

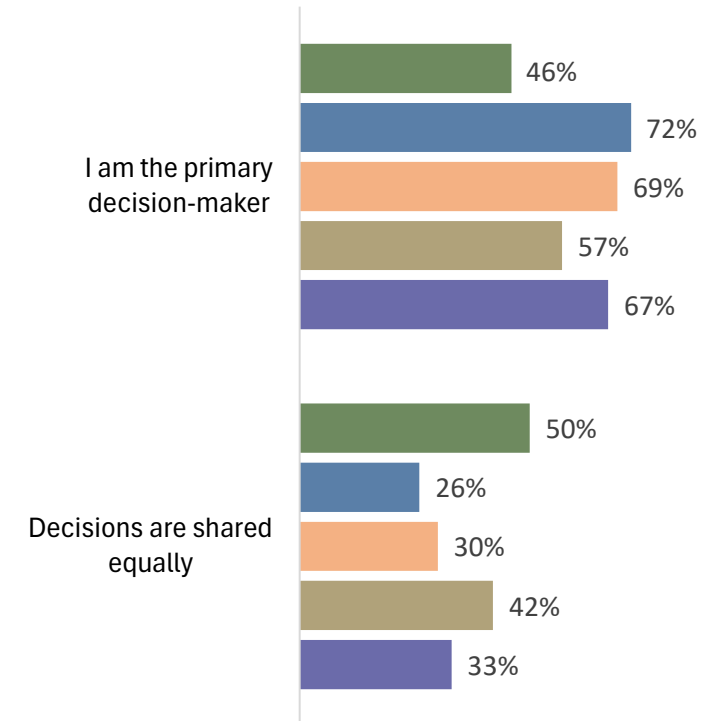
Younger people (25-34) are likely to travel with more companions than older ones. Friends are the most common companions overall, ahead of partners/spouses and children.

A clear majority in every market describe themselves as the primary decision-maker for trip-planning, especially among travellers from the U.S., UK and Mexico. Shared decision-making is more common in Canada and Germany.

Gay and bi+ men and trans or non-binary travellers are most likely to be the main decision-maker; lesbian and bi+ women more often share decisions equally.

Average Number of Travel Companions Per Trip	
Canada	1.7
U.S.	2.4
UK	2.4
Germany	2.0
Mexico	2.8

Role in the Decision-making Process



● Canada ● U.S. ● UK ● Germany ● Mexico

Q4 How many people do you typically travel with on a domestic / an international overnight leisure trip?
 Q8 When choosing destinations, what is your role in the decision-making process?
 All respondents. (n=3,488)

GENERAL TRAVEL: TRIP PLANNING WINDOW

Most 2SLGBTQI+ travellers plan trips within a relatively short window, with 1–3 months emerging as the dominant booking period across all markets.

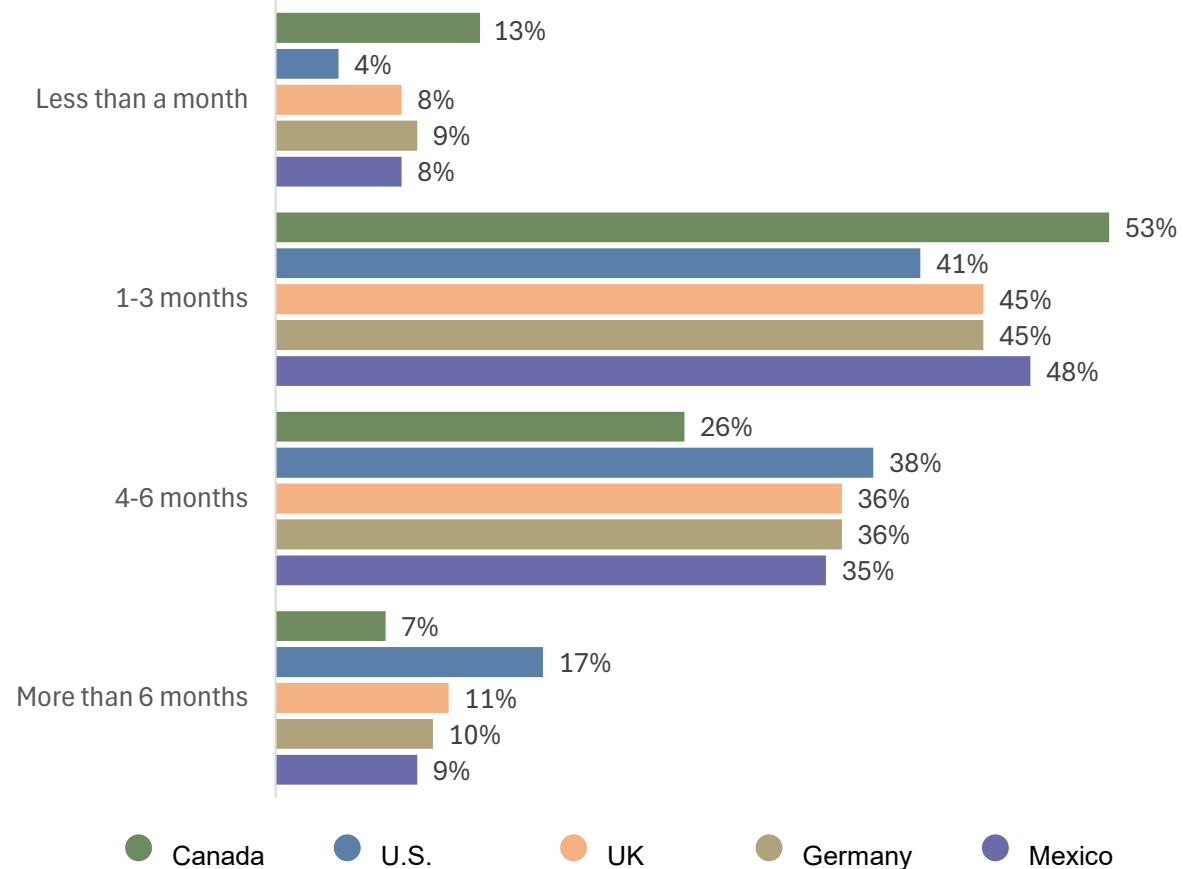
Canadian travellers are the most last-minute, with more than half planning within less than 3 months and comparatively fewer booking 4+ months out.

U.S. travellers show the longest planning horizon, with a higher share planning more than 4 months in advance.

UK, Germany and Mexico all have very similar proportions planning 1–3 months out and 4–6 months out, with relatively few planning in under a month or over six months.

Those who have taken a trip to Ontario before are likely to plan less in advance than those who have not been.

Months in Advance to Plan



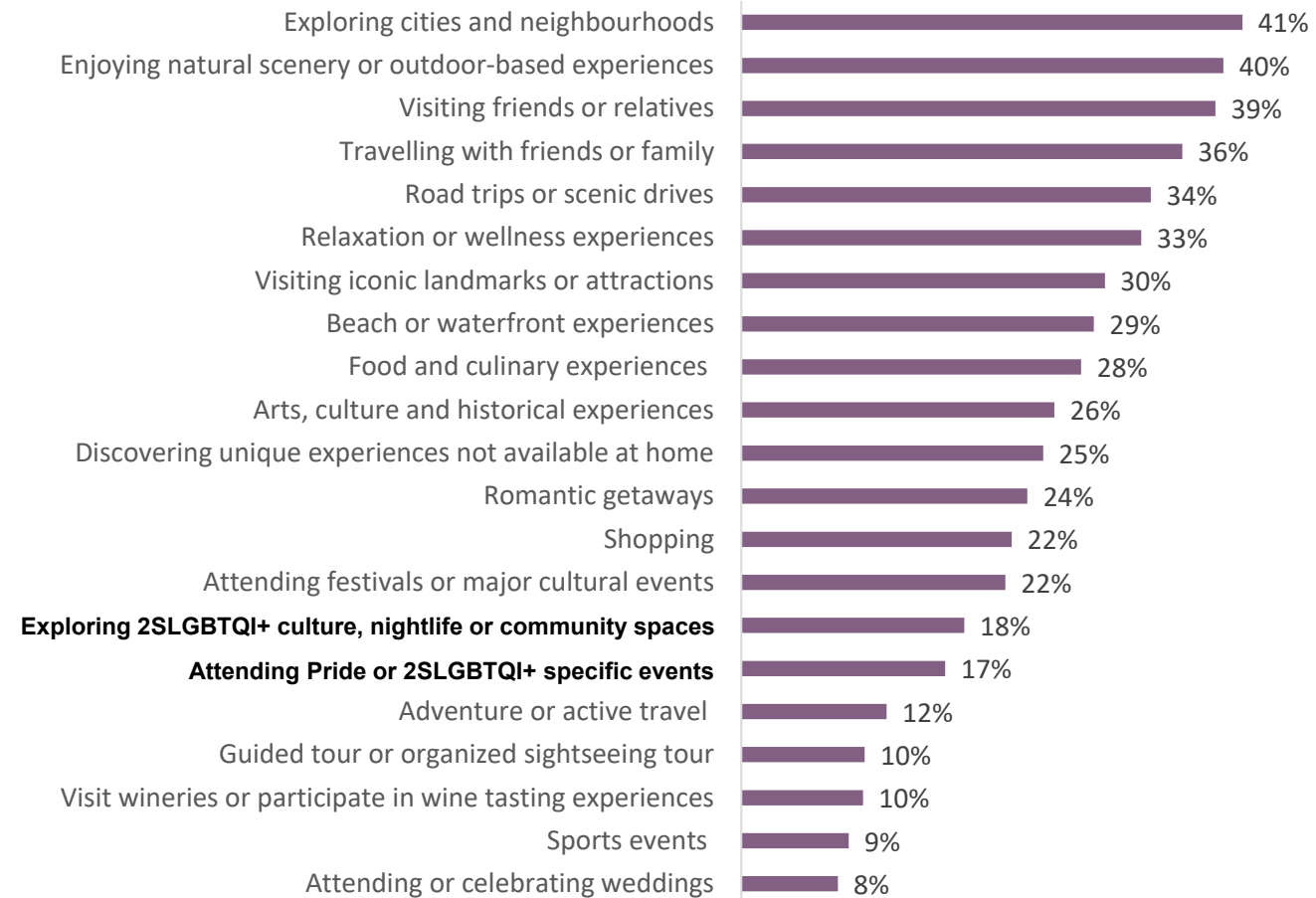
Q2 How many months in advance do you typically begin planning a domestic/ an international overnight leisure trip?
All respondent. (n=3,488)

Within Canada, 2SLGBTQI+ leisure travel is primarily shaped by broad destination experiences, with city exploration, nature, visiting friends or relatives, and travelling with friends or family all ranking ahead of other activities.

The top purposes span urban exploration, outdoor experiences, visiting friends or relatives, and travelling with friends or family, indicating that social connection and general destination appeal are central to trip planning. In practice, this means 2SLGBTQI+ travellers should be viewed as high-fit prospects for Ontario’s core leisure offer, not only for specifically LGBTQI+ programming.

Identity-specific experiences such as exploring 2SLGBTQI+ culture or nightlife and Pride or 2SLGBTQI+ events still matter, but they play a more complementary role.

Purposes of Typical Overnight Leisure Trips



Q7 Which of the following best describes the purposes of your typical domestic/ international overnight leisure trips? Please select all that apply
All respondents. (n=3,479) (Canada n=766)

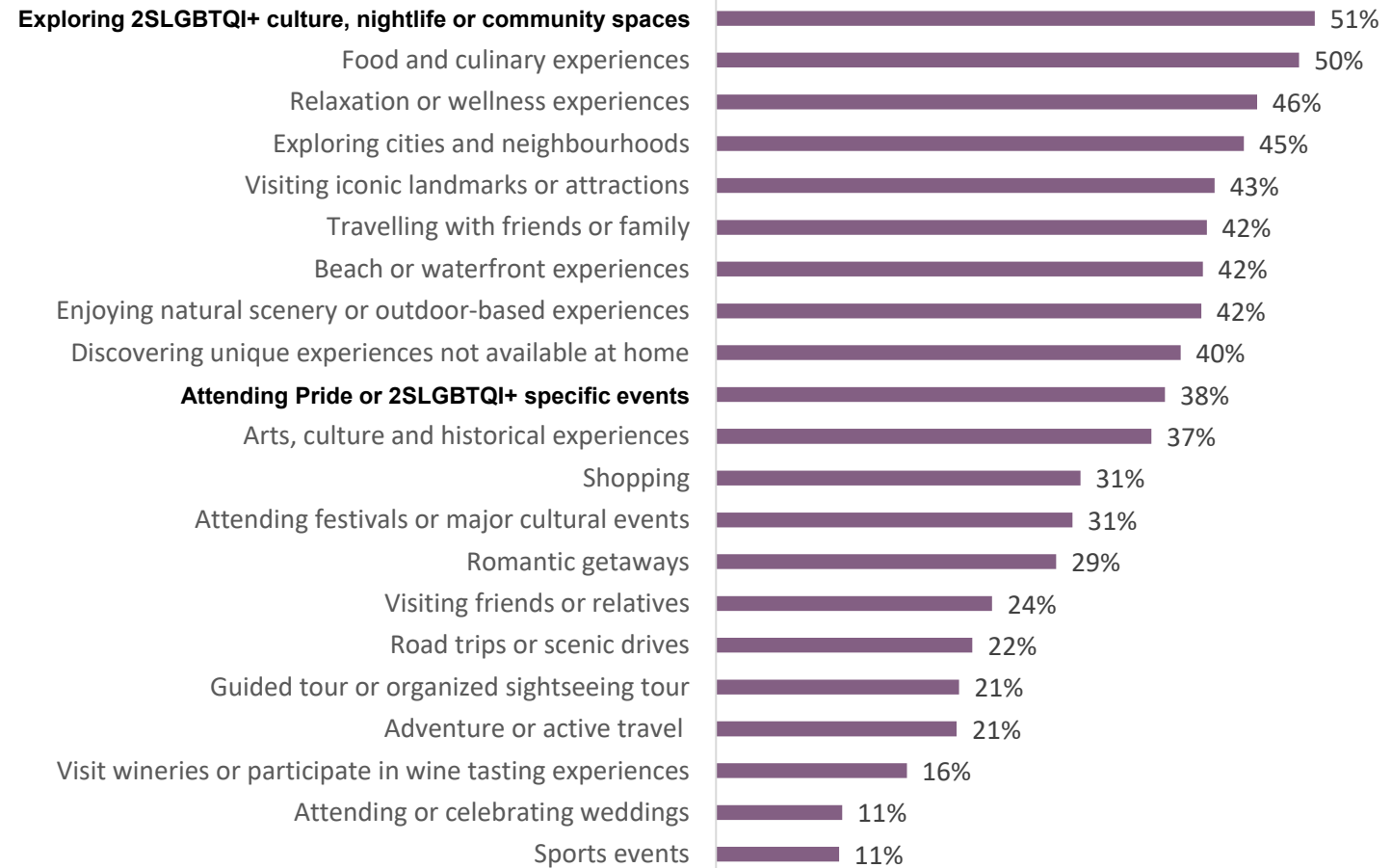
For U.S. 2SLGBTQI+ travellers, trip purposes skew more explicitly identity-driven alongside mainstream leisure.

Exploring 2SLGBTQI+ culture, nightlife or community spaces is the single most common purpose among U.S. travellers, sitting almost equally with food and culinary experiences and relaxation or wellness.

Core city and sightseeing activities remain very important, but identity-specific experiences such as Pride or 2SLGBTQI+ events and discovering unique, not-at-home experiences play a much larger role than in the Canadian profile.

This pattern suggests Ontario’s offer for U.S. 2SLGBTQI+ visitors needs to balance strong destination fundamentals (food, cities, nature) with a clearly visible, vibrant 2SLGBTQI+ scene and event calendar.

Purposes of Typical Overnight Leisure Trips



Q7 Which of the following best describes the purposes of your typical domestic/ international overnight leisure trips? Please select all that apply
All respondents. (n=3,479) (U.S. n=1,481)

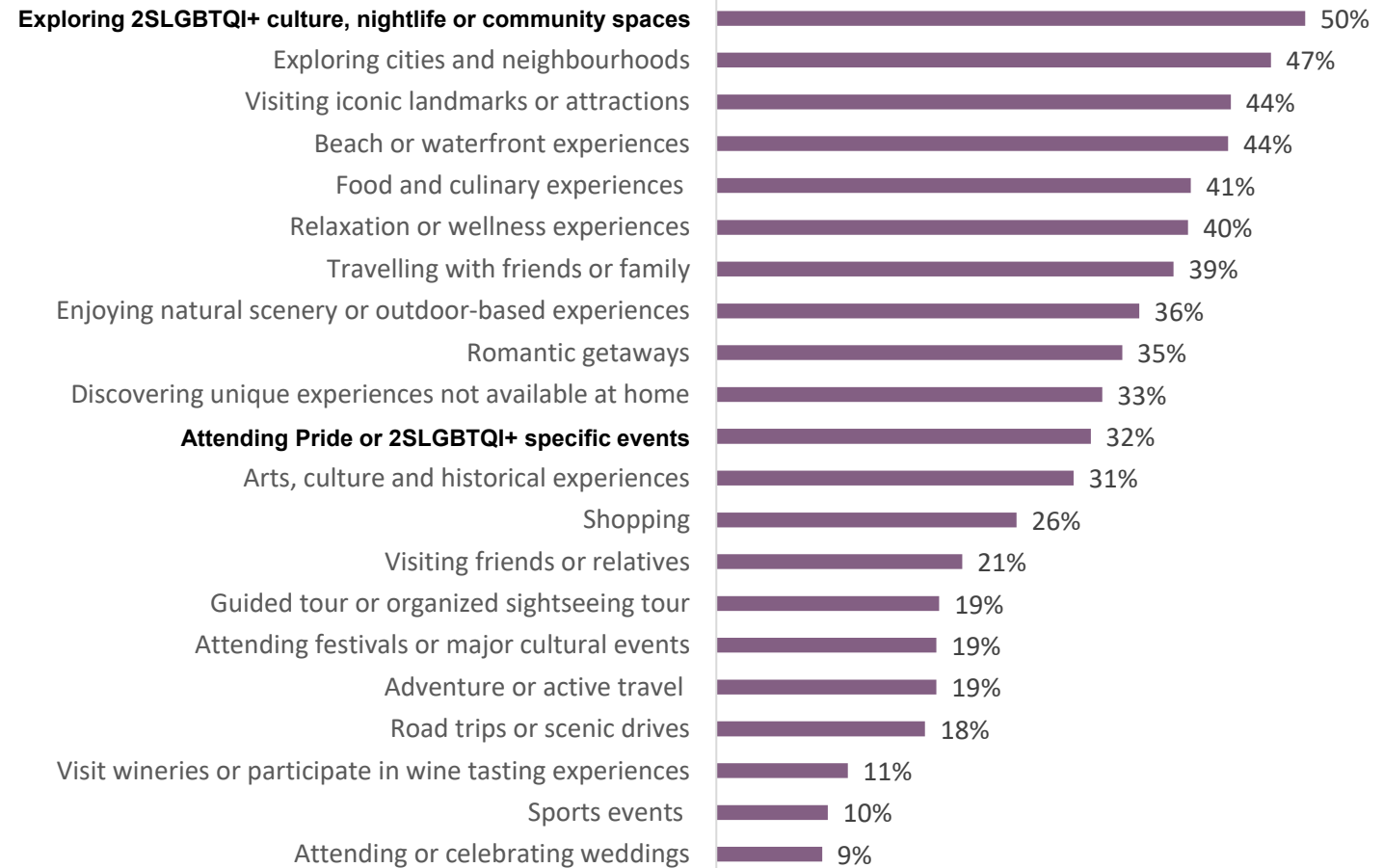
For UK 2SLGBTQI+ travellers, identity-linked experiences are a core part of the leisure trip mix, but they sit alongside a broad interest in city discovery, landmark attractions, waterfront experiences and food.

Exploring 2SLGBTQI+ culture, nightlife or community spaces stands out as the leading trip purpose for UK travellers, closely followed by city exploration and a wider mix of iconic attractions, waterfront settings and culinary experiences.

This suggests UK 2SLGBTQI+ travellers are not looking for a purely niche offer; they are seeking destinations that combine strong mainstream appeal with a visible and authentic 2SLGBTQI+ scene.

Pride and other 2SLGBTQI+ events also rank as meaningful trip drivers, reinforcing that identity-specific experiences are an important part of the overall destination proposition rather than a secondary add-on.

Purposes of Typical Overnight Leisure Trips



Q7 Which of the following best describes the purposes of your typical domestic/ international overnight leisure trips? Please select all that apply
All respondents. (n=3,479) (UK n=409)

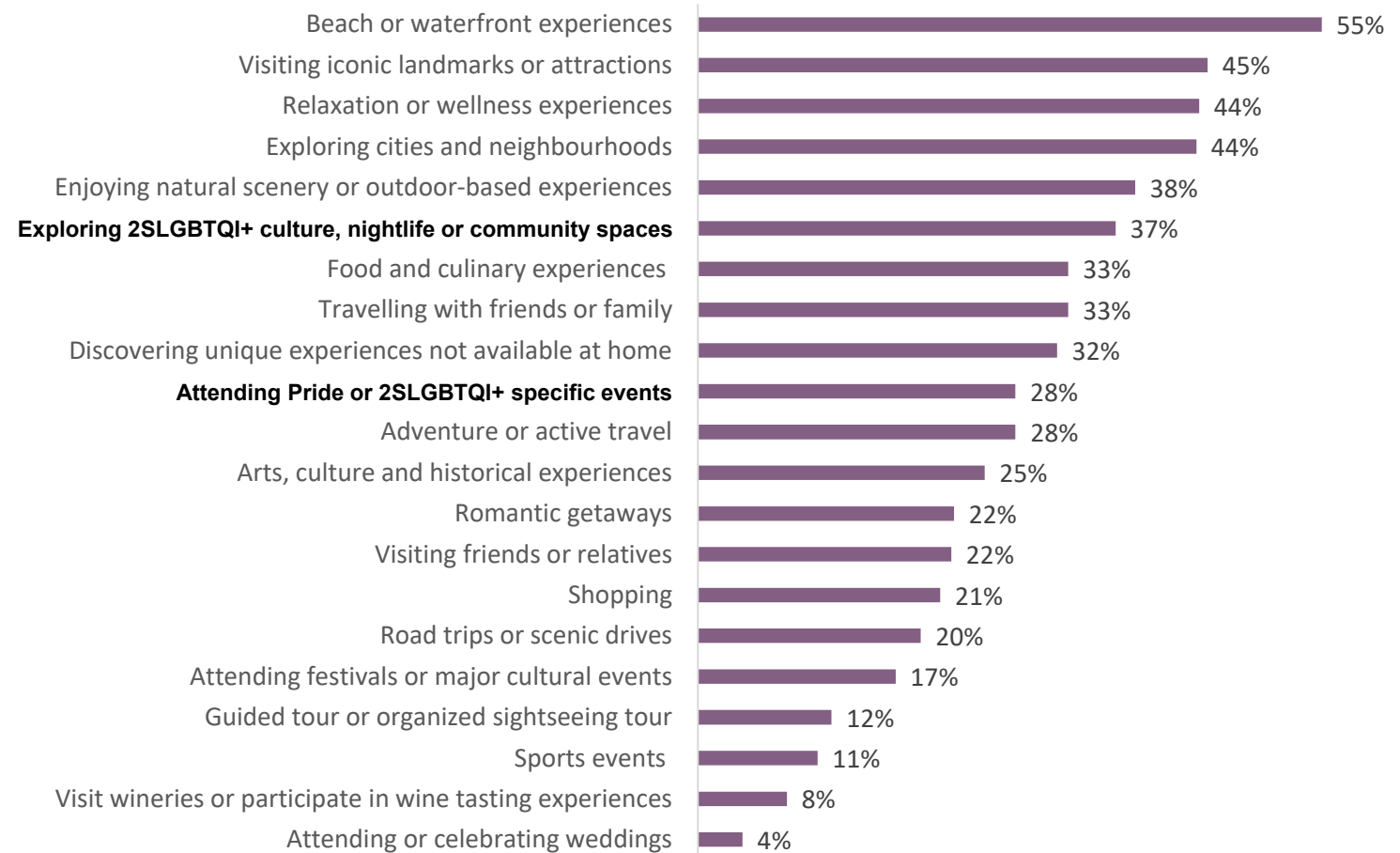
GENERAL TRAVEL: TRIP PURPOSE PROFILE – GERMANY

For German 2SLGBTQI+ travellers, trip purposes lean strongly into classic holiday experiences, with identity-specific elements playing a secondary role.

Beach and waterfront breaks, iconic landmarks, relaxation and city exploration sit at the top of the list. Enjoying natural scenery and outdoor experiences is also a major driver, reinforcing the importance of landscapes and accessible nature in trip planning.

Exploring 2SLGBTQI+ culture or community spaces and attending Pride or other 2SLGBTQI+ events play a meaningful but secondary role. For Ontario, this points to the need to lead with strong nature-plus-city holiday propositions, while clearly signalling inclusive 2SLGBTQI+ experiences as an integrated part of that broader offer.

Purposes of Typical Overnight Leisure Trips



Q7 Which of the following best describes the purposes of your typical domestic/ international overnight leisure trips? Please select all that apply
All respondents. (n=3,479) (Germany n=409)

GENERAL TRAVEL: TRIP PURPOSE PROFILE – MEXICO

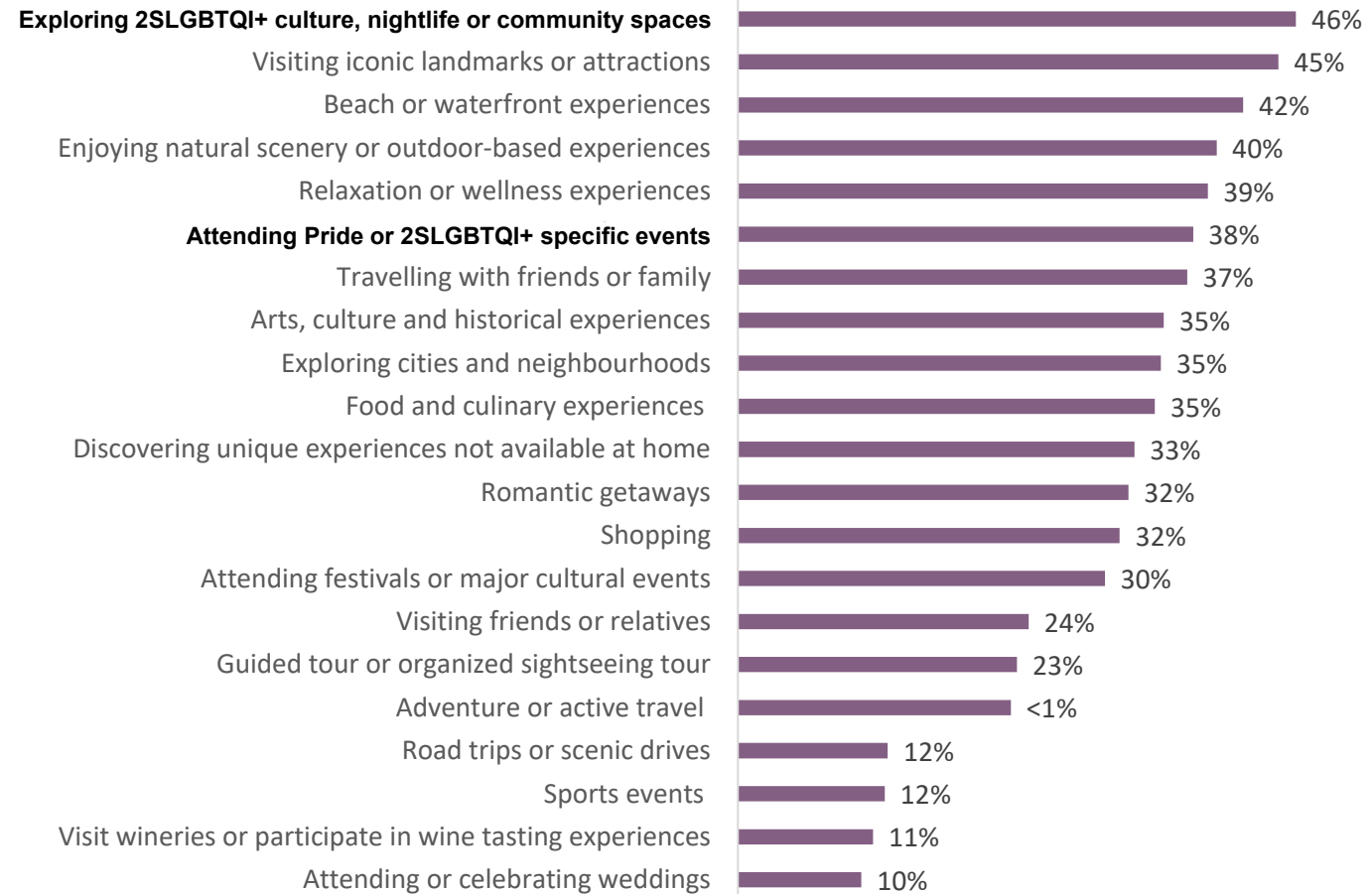
For Mexican 2SLGBTQI+ travellers, trips are anchored in a mix of identity-affirming experiences and classic sightseeing.

Exploring 2SLGBTQI+ culture, nightlife or community spaces sits at the top of the purpose list, tightly followed by visiting iconic landmarks, beach and waterfront time, and enjoying natural scenery.

Relaxation, attending Pride or other 2SLGBTQI+ events, and travelling with friends or family round out the leading motivations, pointing to trips that blend social connection, celebration and destination discovery in equal measure.

For Ontario, this suggests the opportunity is to package inclusive 2SLGBTQI+ scenes and events together with high-impact landmarks, positioning the province as both a safe space and a standout holiday destination for Mexican travellers.

Purposes of Typical Overnight Leisure Trips

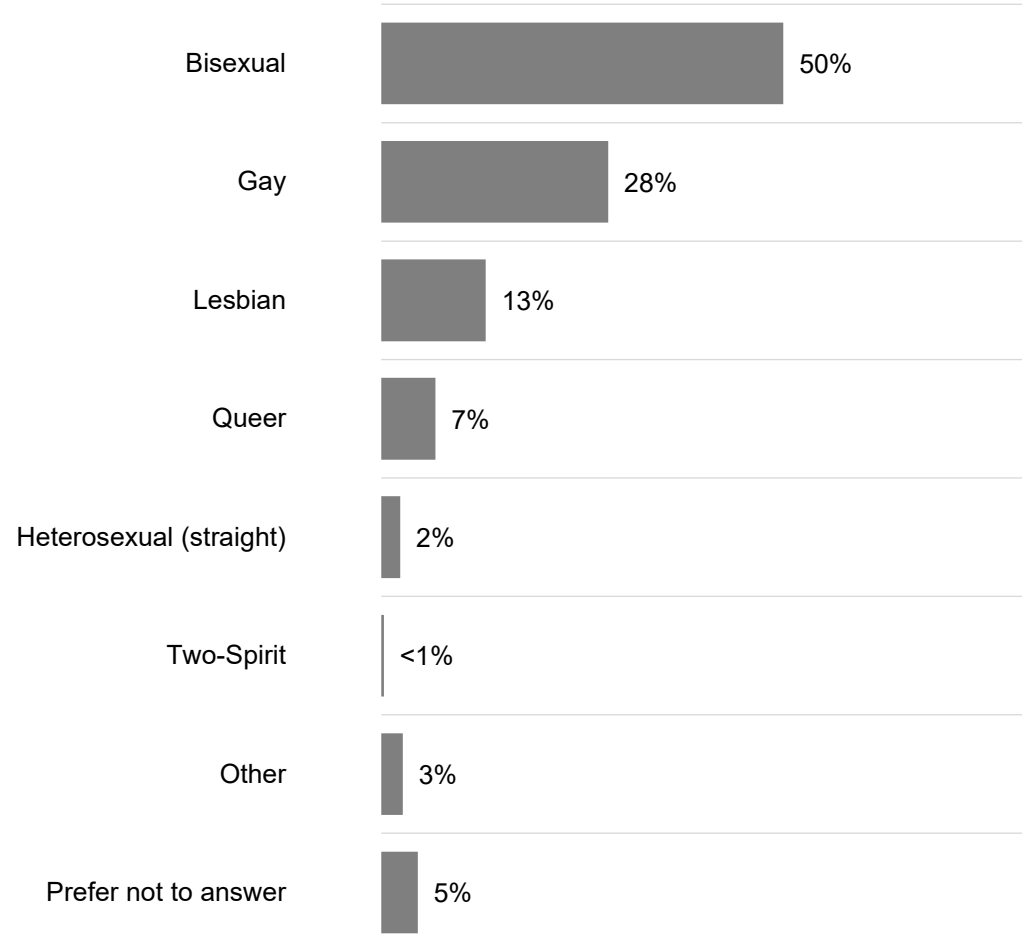


Q7 Which of the following best describes the purposes of your typical domestic/ international overnight leisure trips? Please select all that apply
All respondents. (n=3,479) (Mexico n=410)



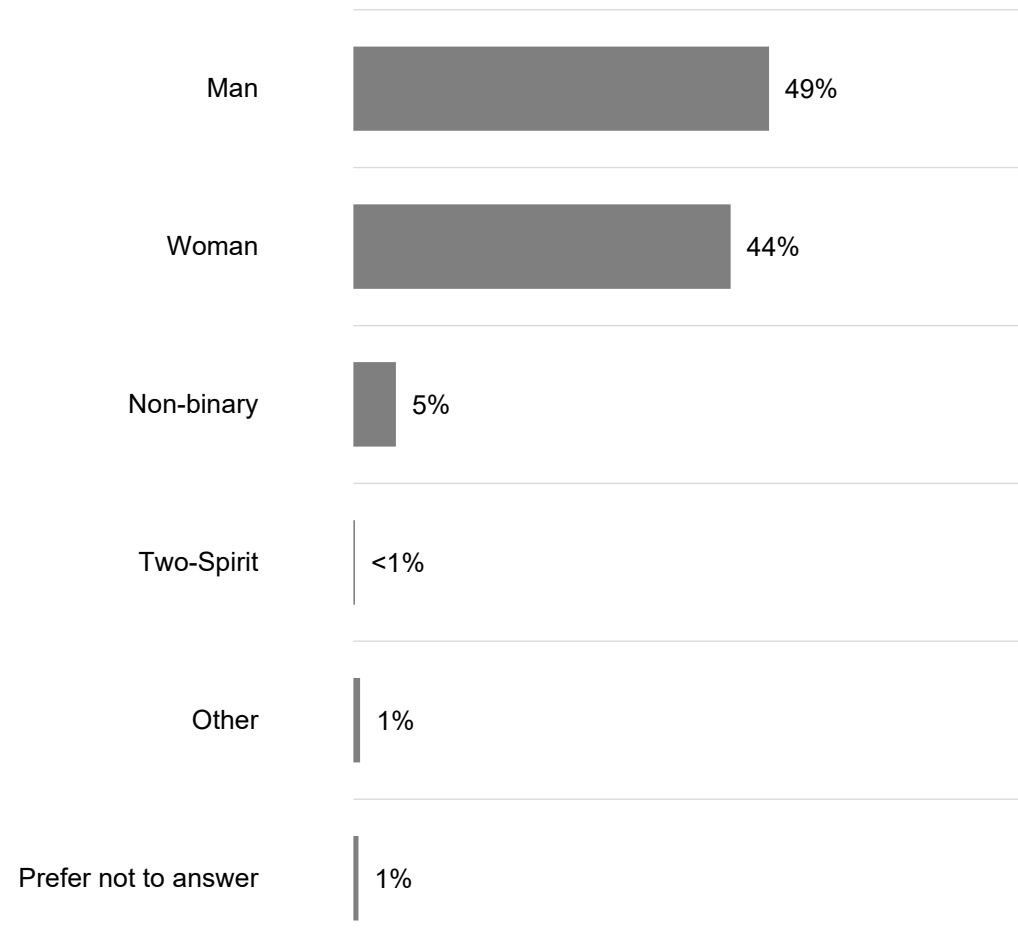
DEMOGRAPHICS

Sexual Orientation



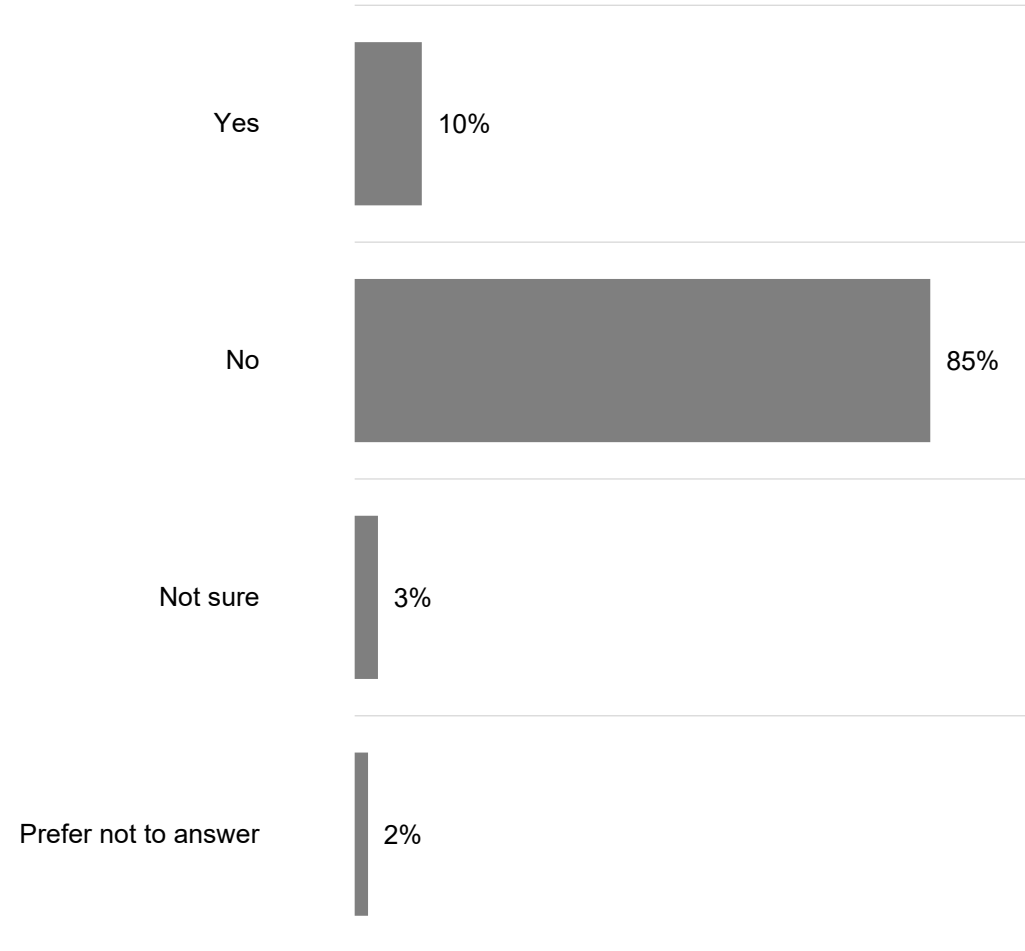
SC4A Which of the following best describes your sexual orientation? (Multi-select)

Sexual Identity



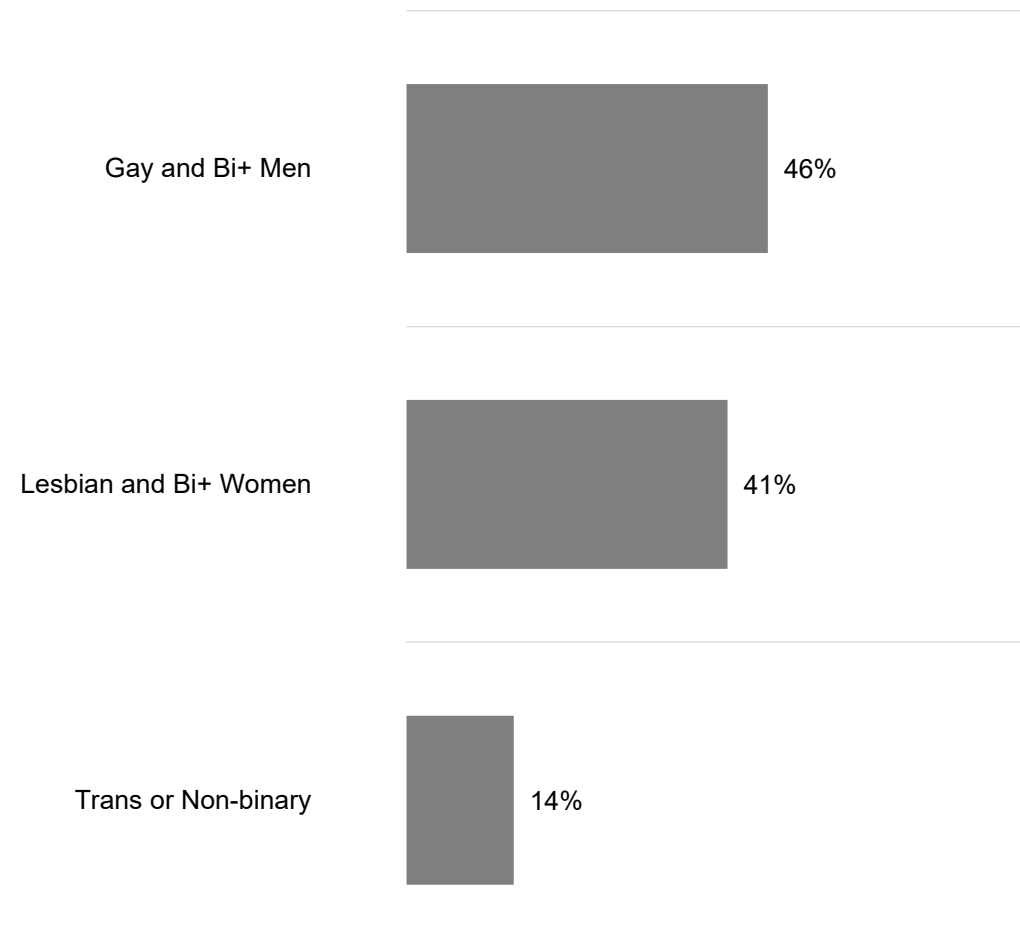
SC4B Which of the following best describes your current gender identity? (Single-select)

Transgender



SC4C Do you consider yourself to be transgender or trans? (Single-select)

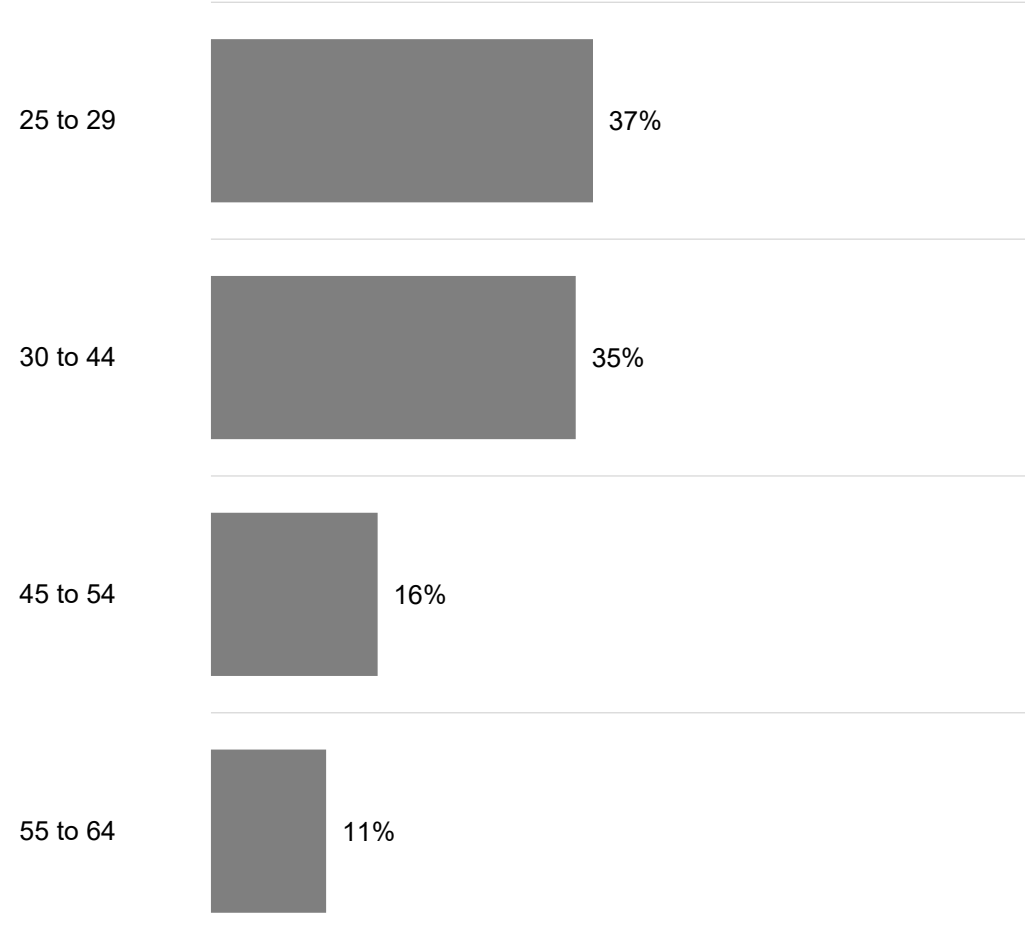
Segment Identity



Constructed Variable. See Slide 7 for details.

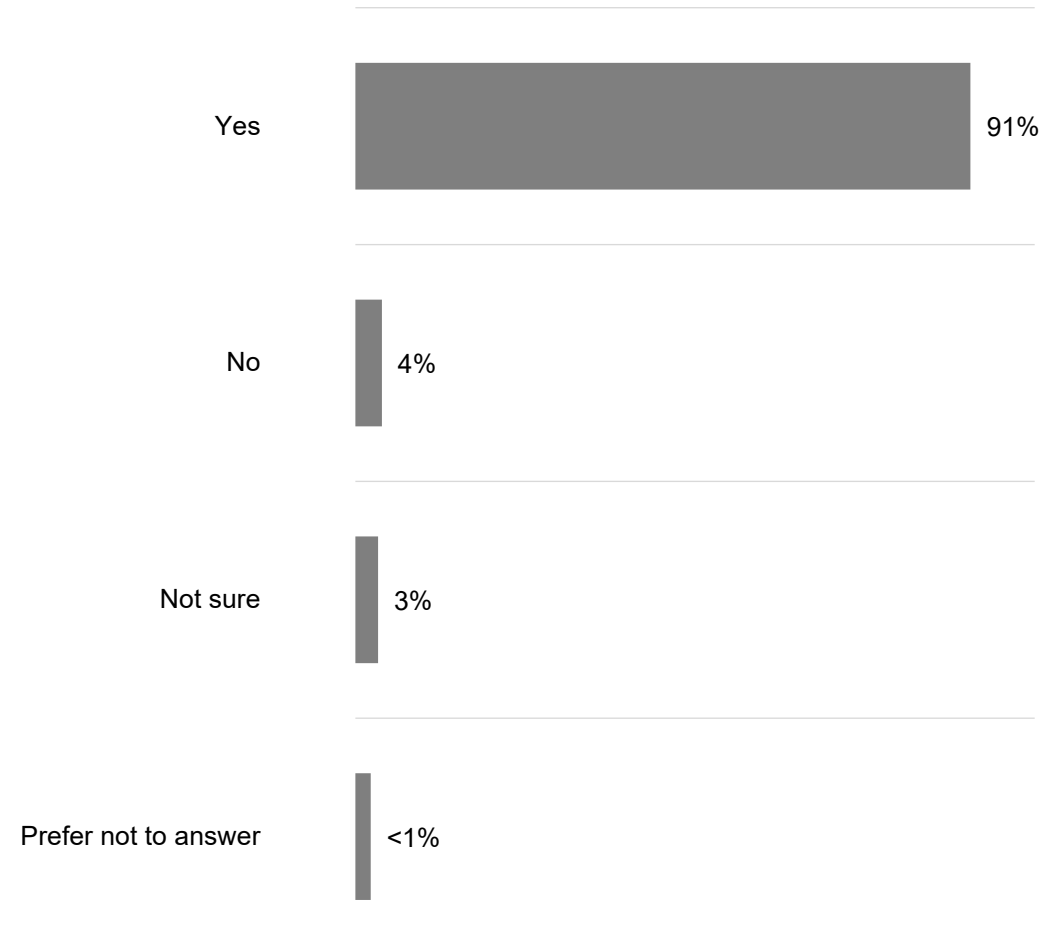
DEMOGRAPHICS

Age



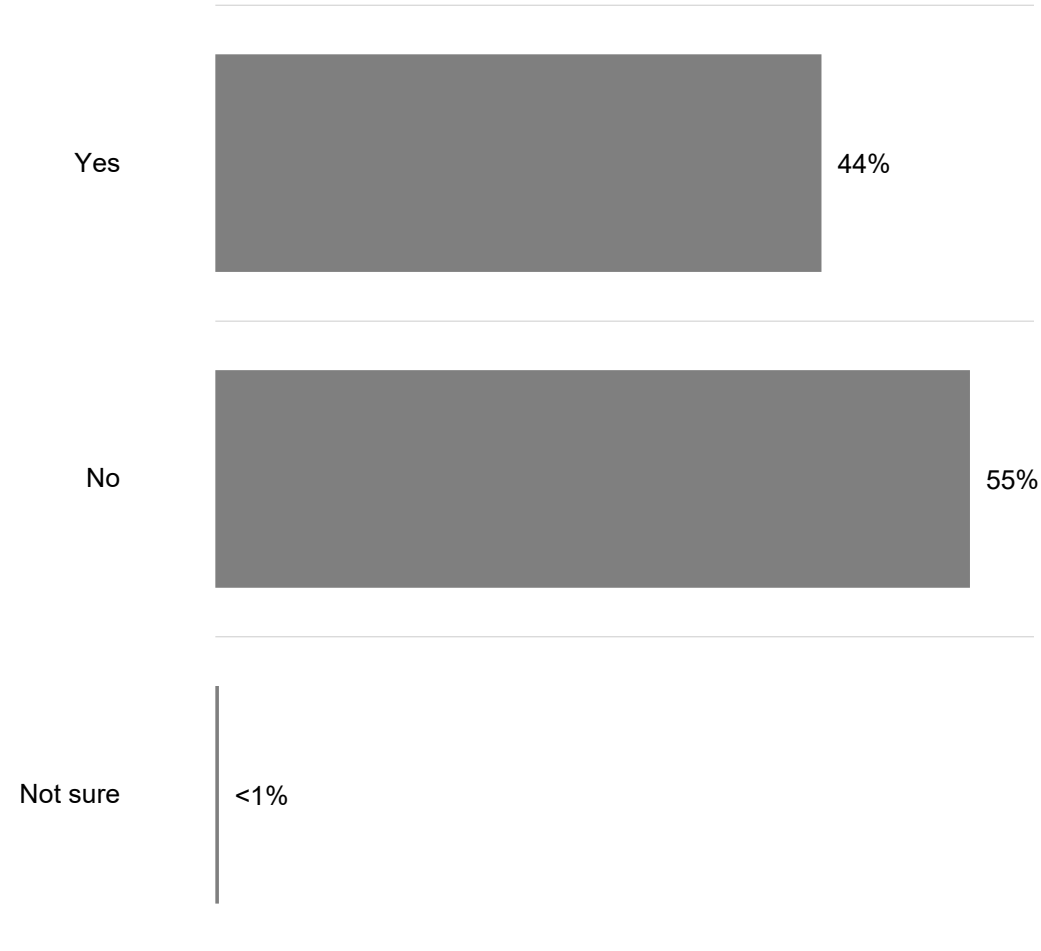
SC1 Which category below includes your age? (Single-select)

Part of the Community



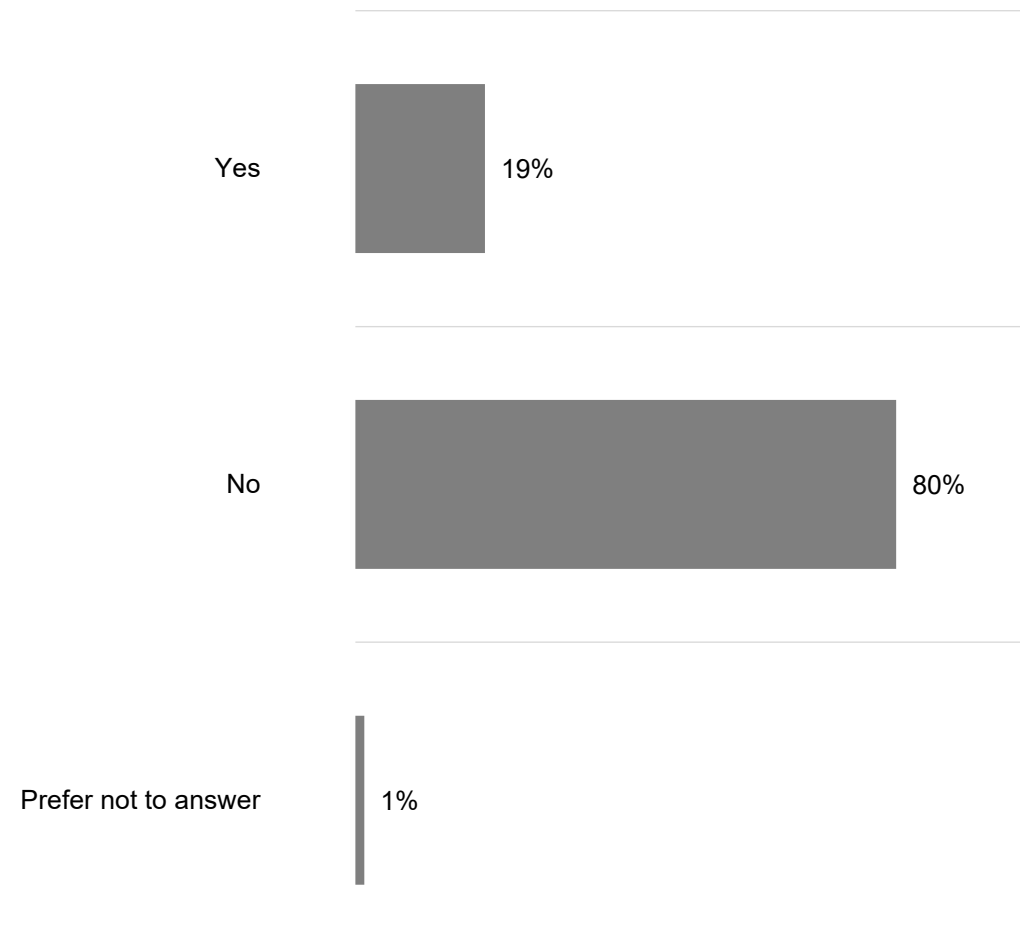
SC3 Do you consider yourself to be part of the 2SLGBTQI+ community? (Single-select)

Visited Ontario



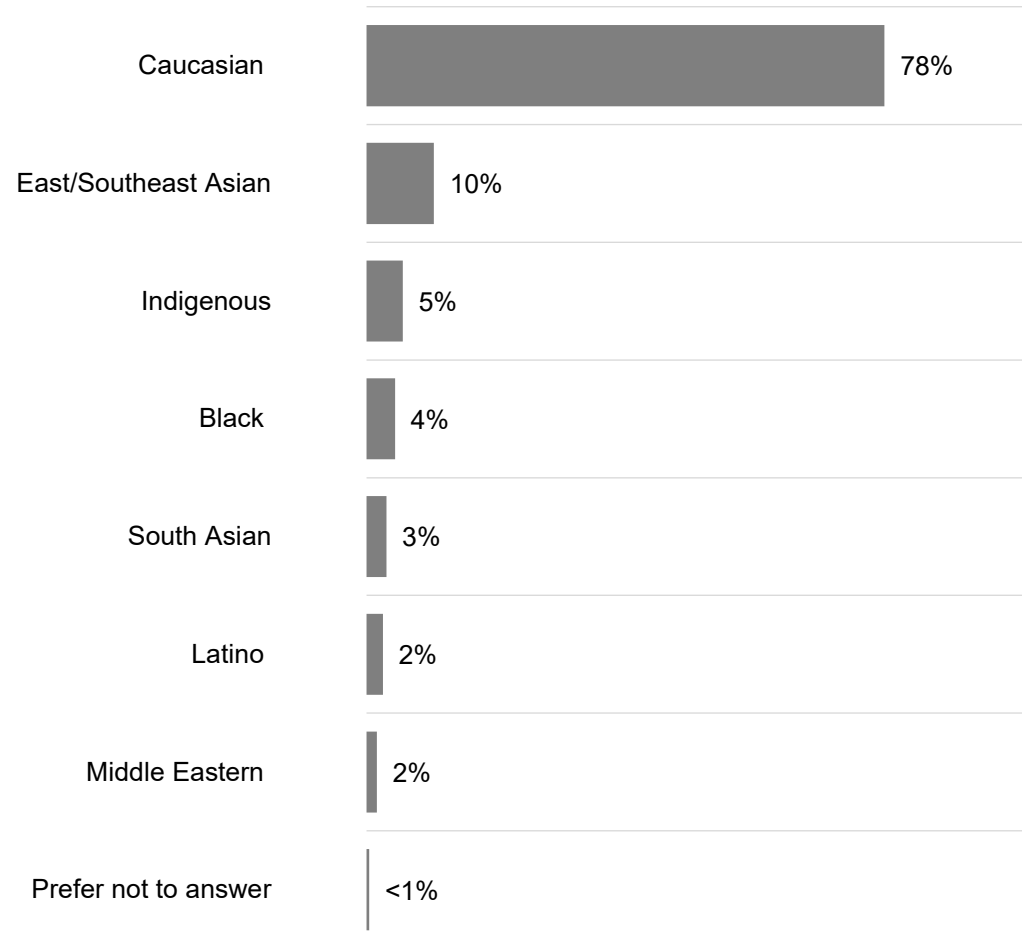
D1 Have you ever taken a trip in Ontario, Canada before? (Single-select)

Person with Disability



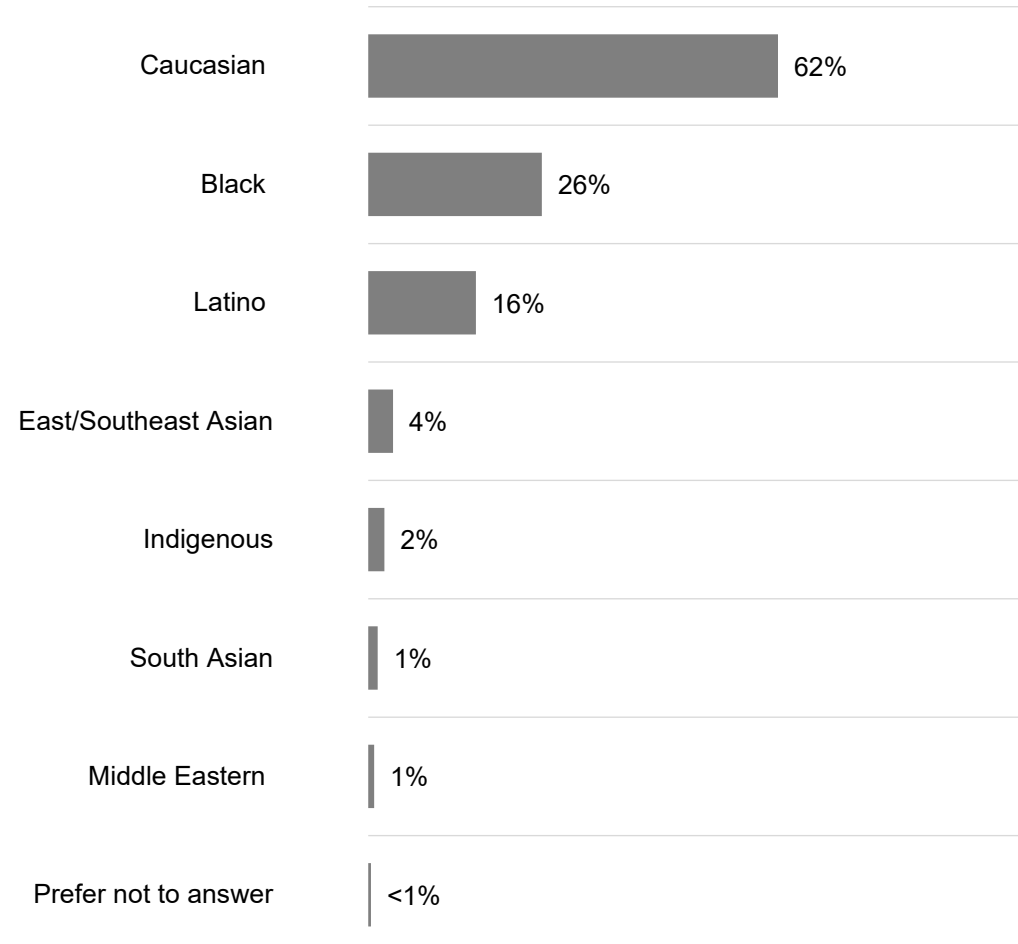
D4 Would you describe yourself as a person living with a disability (physical disability, mental health disability, or health problem)? (Single-select)

Ethnic / Cultural Background (Canada)



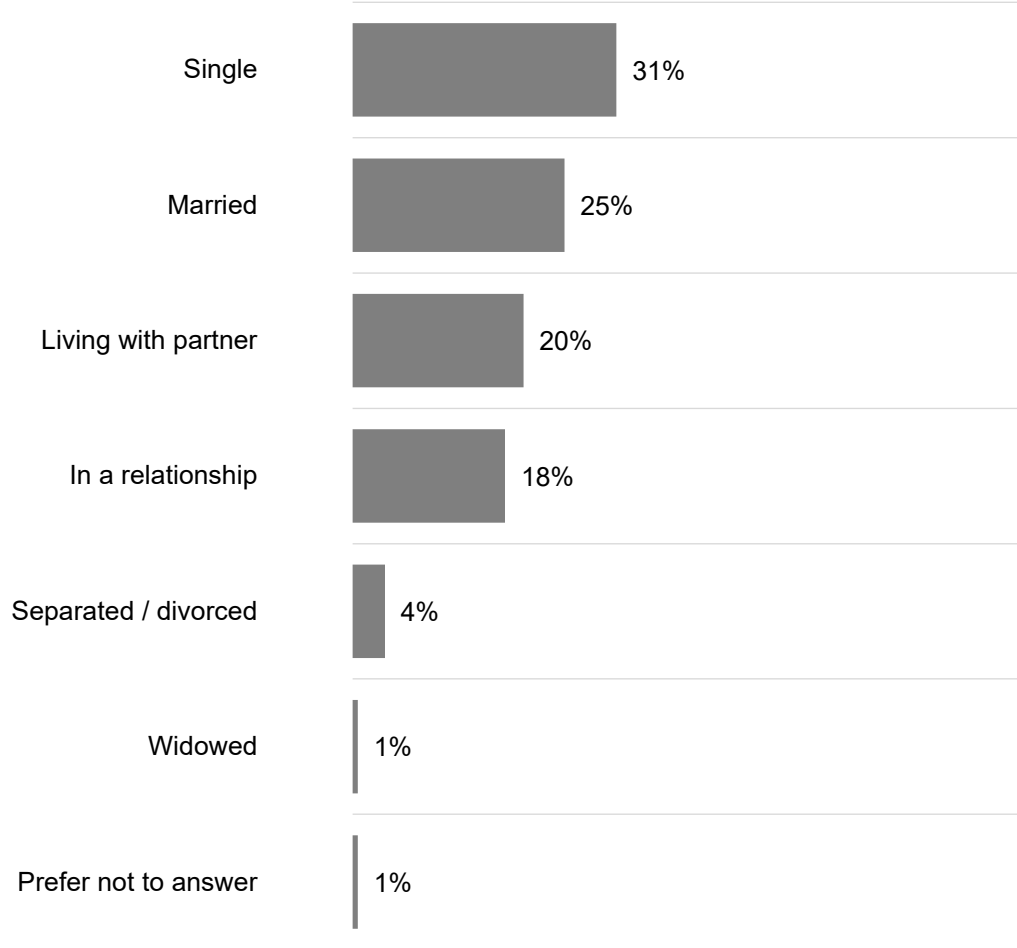
D2 Please indicate which of these best describes your ethnic or cultural background. (Multi-select) (Asked to Canada and US only)

Ethnic / Cultural Background (U.S.)



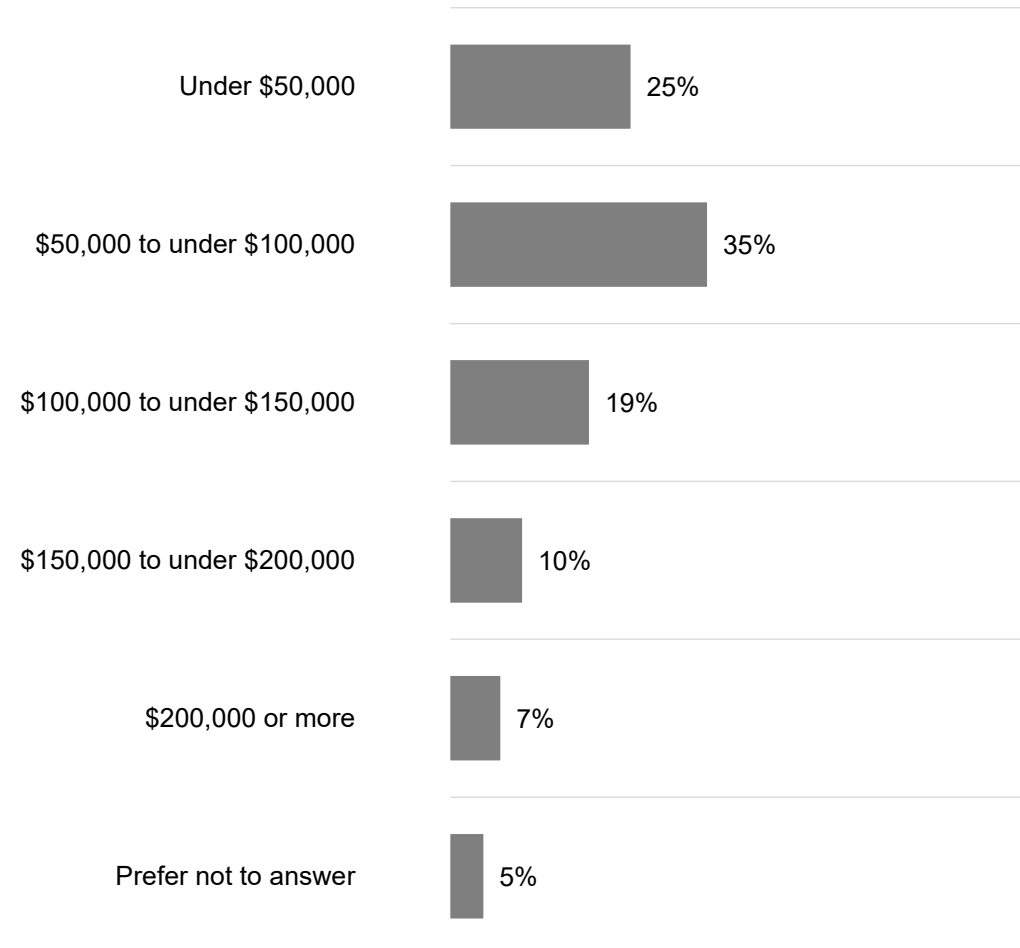
D2 Please indicate which of these best describes your ethnic or cultural background. (Multi-select) (Asked to Canada and US only)

Relationship Status



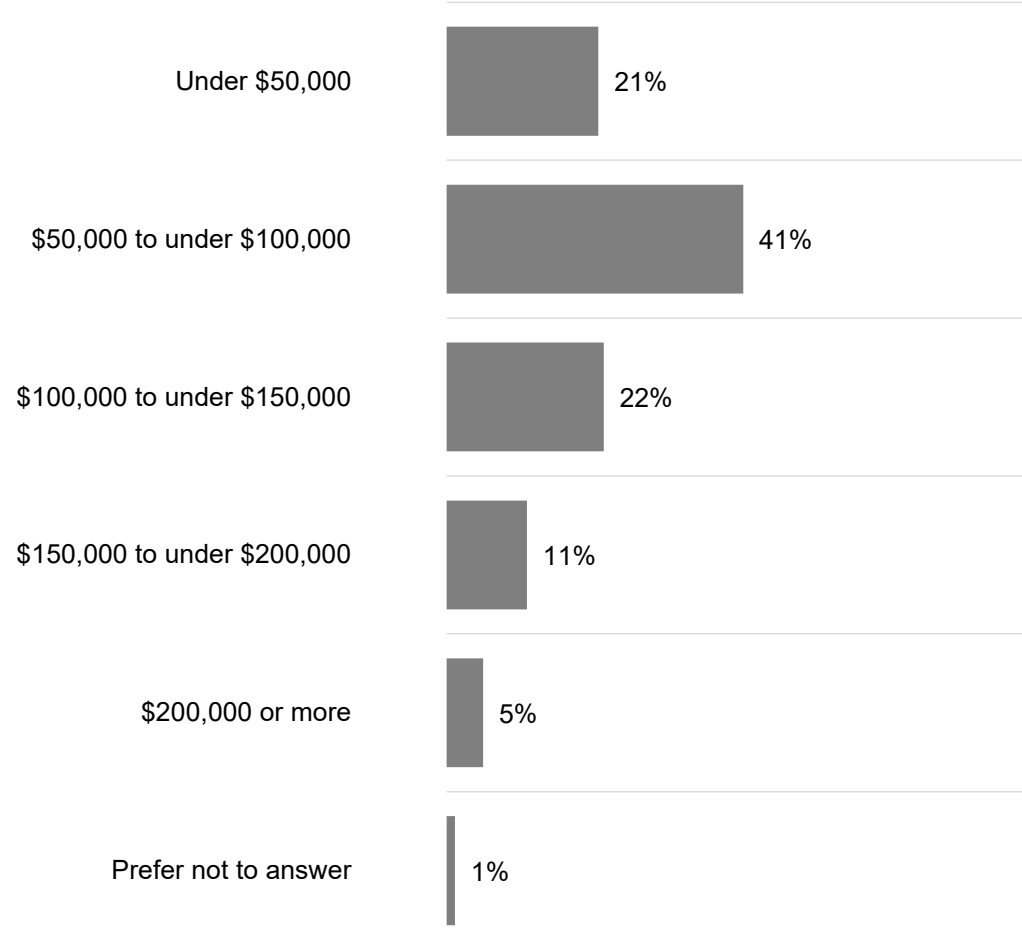
D6 What is your current relationship status? (Single-select)

Household Income (Canada)



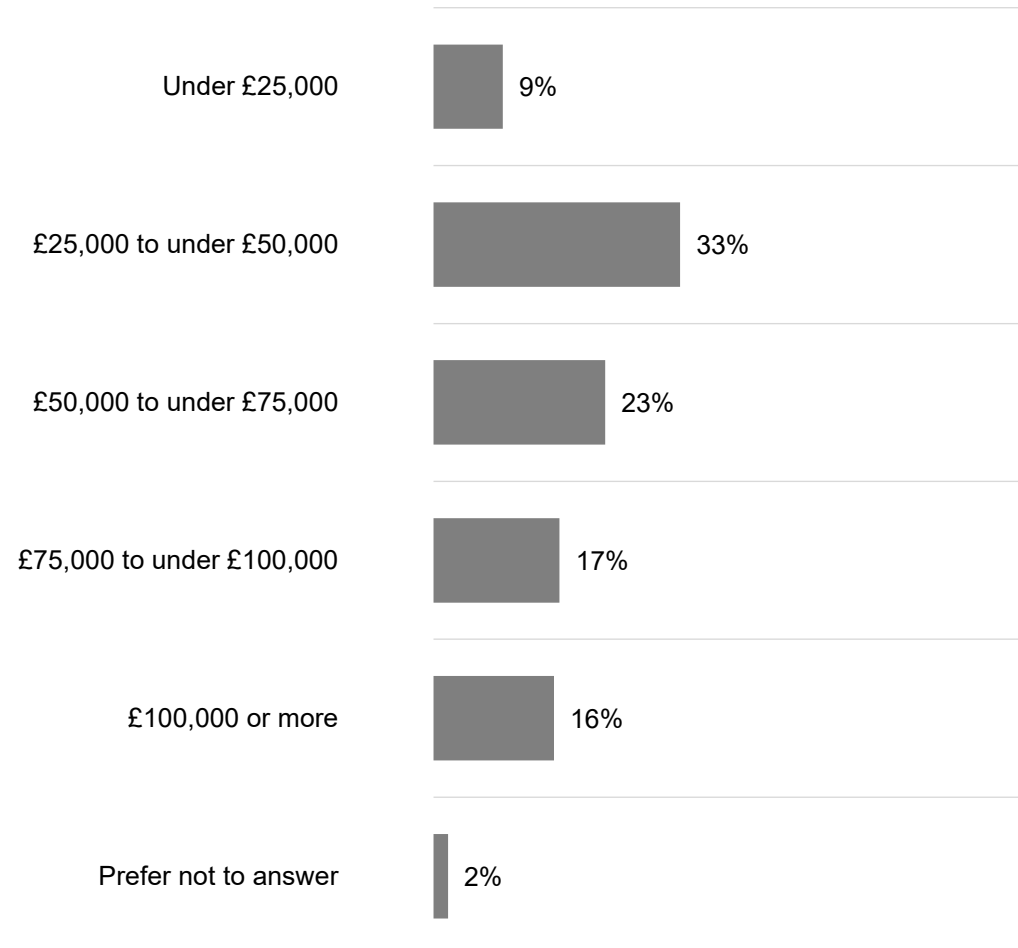
D5 Which of the following best describes your household's total annual income before taxes? (Canadian Dollars) (Single-select)

Household Income (U.S.)



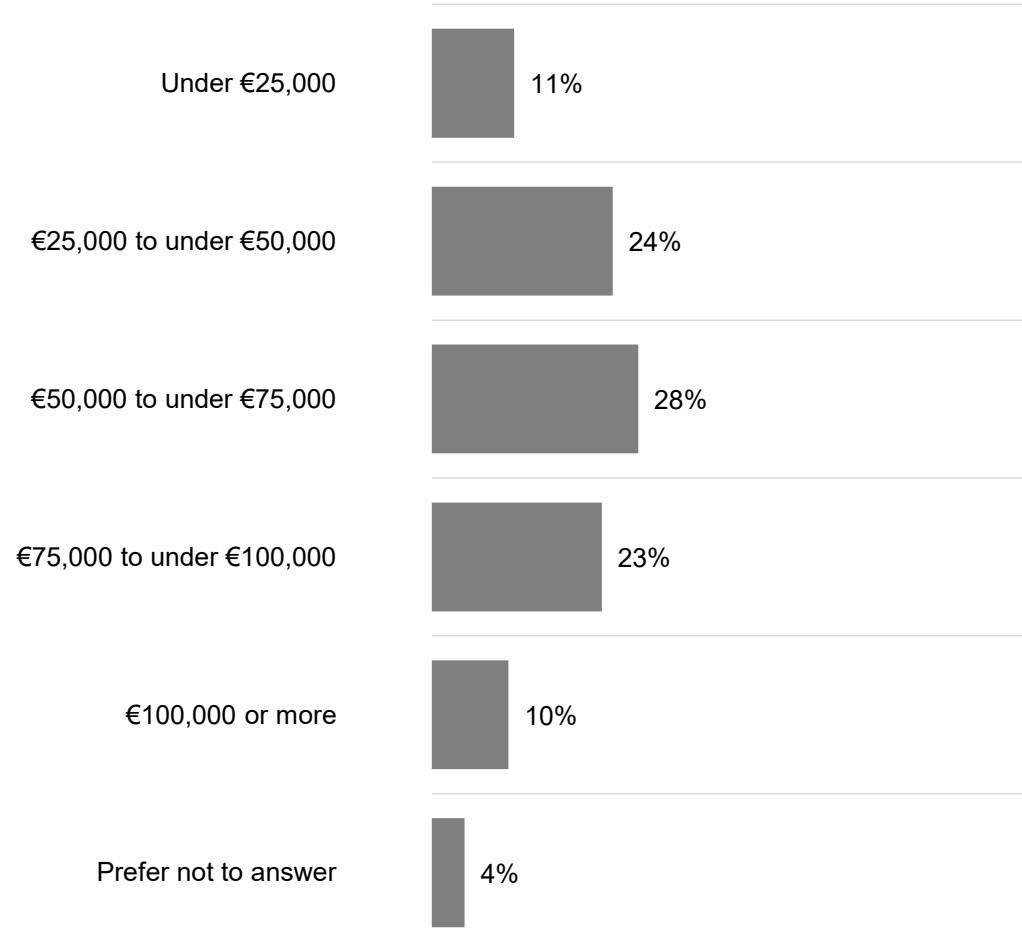
D5 Which of the following best describes your household's total annual income before taxes? (U.S. Dollars) (Single-select)

Household Income (UK)



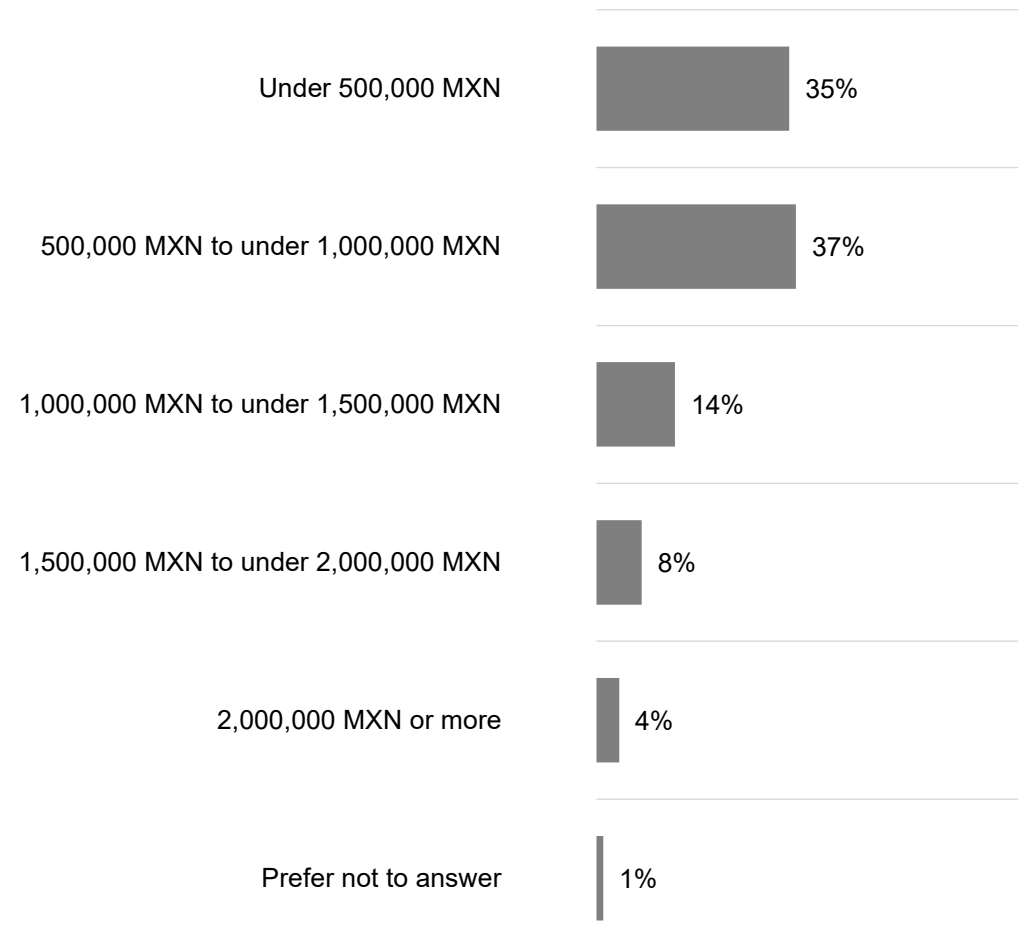
D5 Which of the following best describes your household's total annual income before taxes? (British Pounds) (Single-select)

Household Income (Germany)



D5 Which of the following best describes your household's total annual income before taxes? (Euros) (Single-select)

Household Income (Mexico)



D5 Which of the following best describes your household's total annual income before taxes? (Mexican Pesos) (Single-select)

CONTEXT IS EVERYTHING

crg.ca