



DESTINATION ONTARIO

In partnership with Destination Ontario

DOinsights.crg.ca

ONTARIO TRAVEL & TOURISM MONTHLY

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ONTARIO TRAVEL & TOURISM MONTHLY (OTTM)

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

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

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

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

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

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

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

MONTHLY METHODOLOGY

Methodology:

- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:

- Resident of Ontario, U.S. Drive (Michigan, Ohio, Upstate NY), U.S. Fly (NYC, Chicago), Western Canada, Manitoba, Quebec, and Atlantic Canada
- 25 to 64 years of age
- Planning to take a pleasure trip in the next 12 months or have taken a pleasure trip in the past 12 months
- Minimum HH income of \$100K for U.S. Fly

Sample Size:

- Total (n=2,053)
- Ontario (n=512)
- U.S. Drive (n=256)
- U.S. Fly (n=257)
- Western Canada (n=258)
- Manitoba (n=256)
- Quebec (n=256)
- Atlantic Canada (n=257)

Fieldwork Date:

- January 14th – 27th, 2026

Median Length of Interview:

- 10.8 minutes

Margin of Error:

- Ontario: $\pm 4.3\%$
- U.S. Drive: $\pm 6.1\%$
- U.S. Fly: $\pm 6.1\%$
- Western Canada: $\pm 6.1\%$
- Manitoba: $\pm 6.1\%$
- Quebec: $\pm 6.1\%$
- Atlantic Canada: $\pm 6.1\%$

Weighting:

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

Rounding:

Due to rounding, the numbers may not add up to the totals. For example, the sum of all values may add up to 99% or 101%.

Top 2 / Bottom 2:

In some cases, results are presented as Top 2 (TOP2) or Bottom 2 (BTM2) scores, which group the top two and bottom two points of a scale, respectively, to highlight overall positive or negative sentiment.

METRICS AND COLOUR CODING

Rolling Averages

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

Rolling Average (RA) Change

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

MoM Change

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

Significant Changes

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

TERMINOLOGY – MARKETS & COMPARISONS

U.S. Drive

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

For this study, the U.S. Drive markets include:

- Michigan: Detroit, Ann Arbor, Lansing
- New York: Albany, Rochester, Syracuse, Buffalo
- Ohio: Cleveland, Toledo

U.S. Fly

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

For this study, the U.S. Fly markets include:

- Chicago
- New York City

Western Canada

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

Atlantic Canada

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

EXECUTIVE SUMMARY

Interest in travelling to Ontario remains strongest among Ontario residents, while intent from both U.S. Fly and U.S. Drive markets is softening. Travellers are planning further ahead, with mid-term trips gaining momentum as short-term visits ease, and summer continues to anchor demand.

Ontario retains its reputation as a desirable, culturally diverse, and experience-rich destination. Advocacy is strongest within Ontario, while perceptions in the U.S. have softened slightly.

Interest in seeking travel information is steady overall but easing among U.S. travellers. Internet search, review and booking sites, and social platforms, especially Instagram, remain central to how travellers research and plan Ontario trips, with AI tools mainly used for attraction research and inspiration.

Travel attitudes remain stable, though regional differences are becoming more pronounced. U.S. Fly travellers continue to see strong value in travel, Quebec remains more skeptical and financial pressures are felt most in Manitoba and Atlantic Canada as Ontario residents lean toward in-province trips.

Concern about snow and wildfire disruption remains low overall and continues to decline in U.S. markets. Interest in sustainable tourism is steady; U.S. Fly travellers are the most motivated, while willingness to pay more is strengthening in Manitoba and Atlantic Canada.

Awareness of Toronto as a FIFA 2026 host city remains strong in Ontario but is softening elsewhere. While FIFA still motivates some U.S. Fly visitors, its pull is weakening across both the U.S. and Canadian markets. Avoidance of Toronto around the event is rising across regions, including among GTA residents.

KPI – 3 MONTH ROLLING AVERAGE

ONTARIO

U.S. DRIVE

U.S. FLY

Travel Intent In The Next 12 Months

82%

+2%

56%

-3%

62%

-3%

Travel Info Search

51%

-

56%

-4%

73%

-1%

Travel Worthwhile Investment

67%

-2%

71%

-1%

83%

-

KPI – 3 MONTH ROLLING AVERAGE

WESTERN CA	MANITOBA	QUEBEC	ATLANTIC CA
Travel Intent In The Next 12 Months			
46%	56%	45%	58%
-1%	+1%	-4%	-1%
Travel Info Search			
62%	57%	54%	55%
+2%	+2%	-	+1%
Travel Worthwhile Investment			
64%	67%	49%	66%
+1%	-4%	-2%	-



TRAVEL DESTINATION PLANS

Interest in travelling to Ontario remains strongest among Ontario residents and is trending upward, with U.S. Fly, Manitoba, and Atlantic Canada as the next most engaged markets. Toronto and the Niagara Region remain the key destinations under consideration, followed by Ottawa.

Summer dominates planned travel as intent builds from early to late summer, and across markets the mid-term window shows the greatest momentum while near-term intent has softened and long-term plans are beginning to ease.

Tags - Explore more on DOinsights.crg.ca

Travel Intent

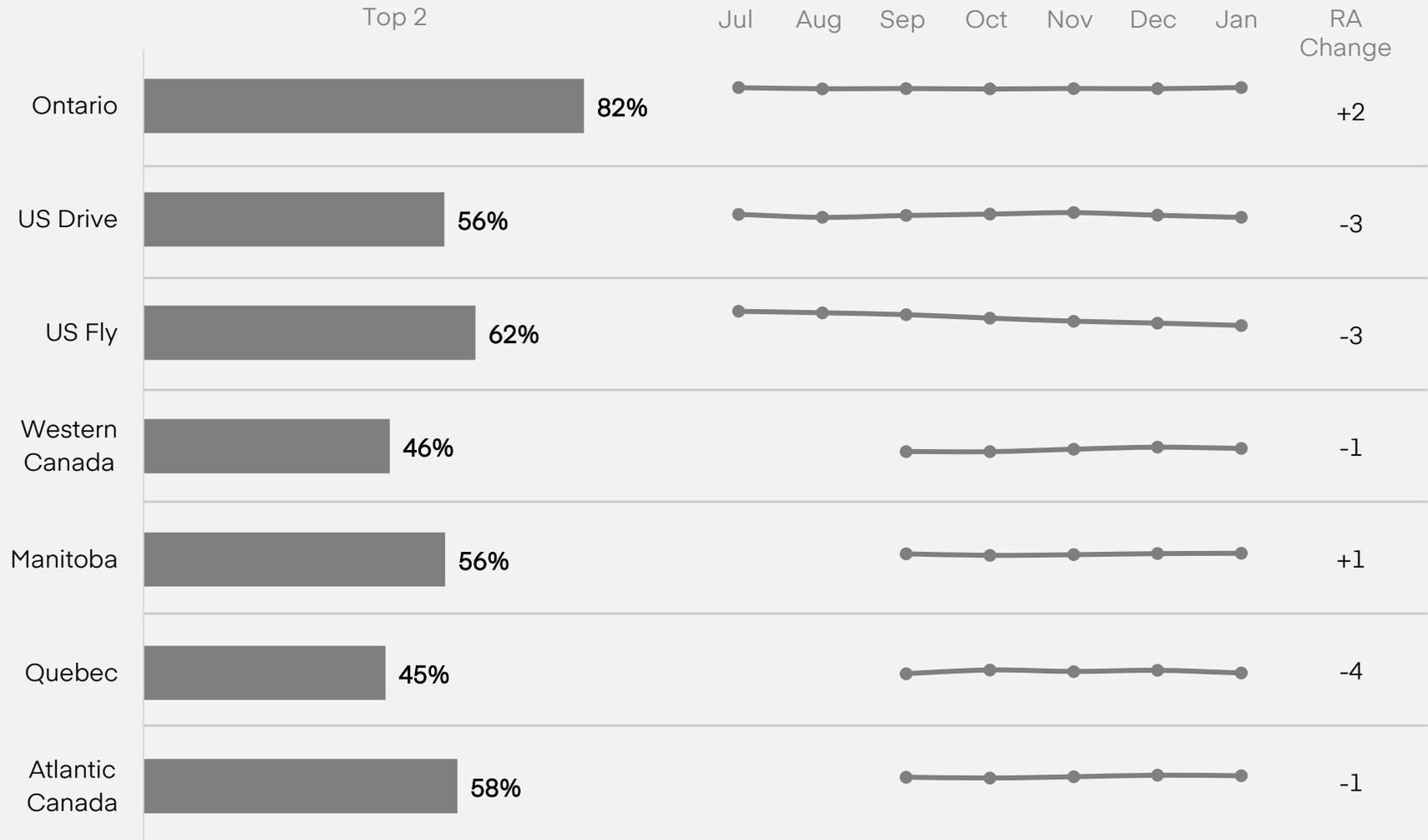
Number of Trips

Month of Travel

LIKELIHOOD OF TRAVELLING TO ONTARIO

Interest in travelling to Ontario remains strongest among Ontario residents and is on an upward trend.

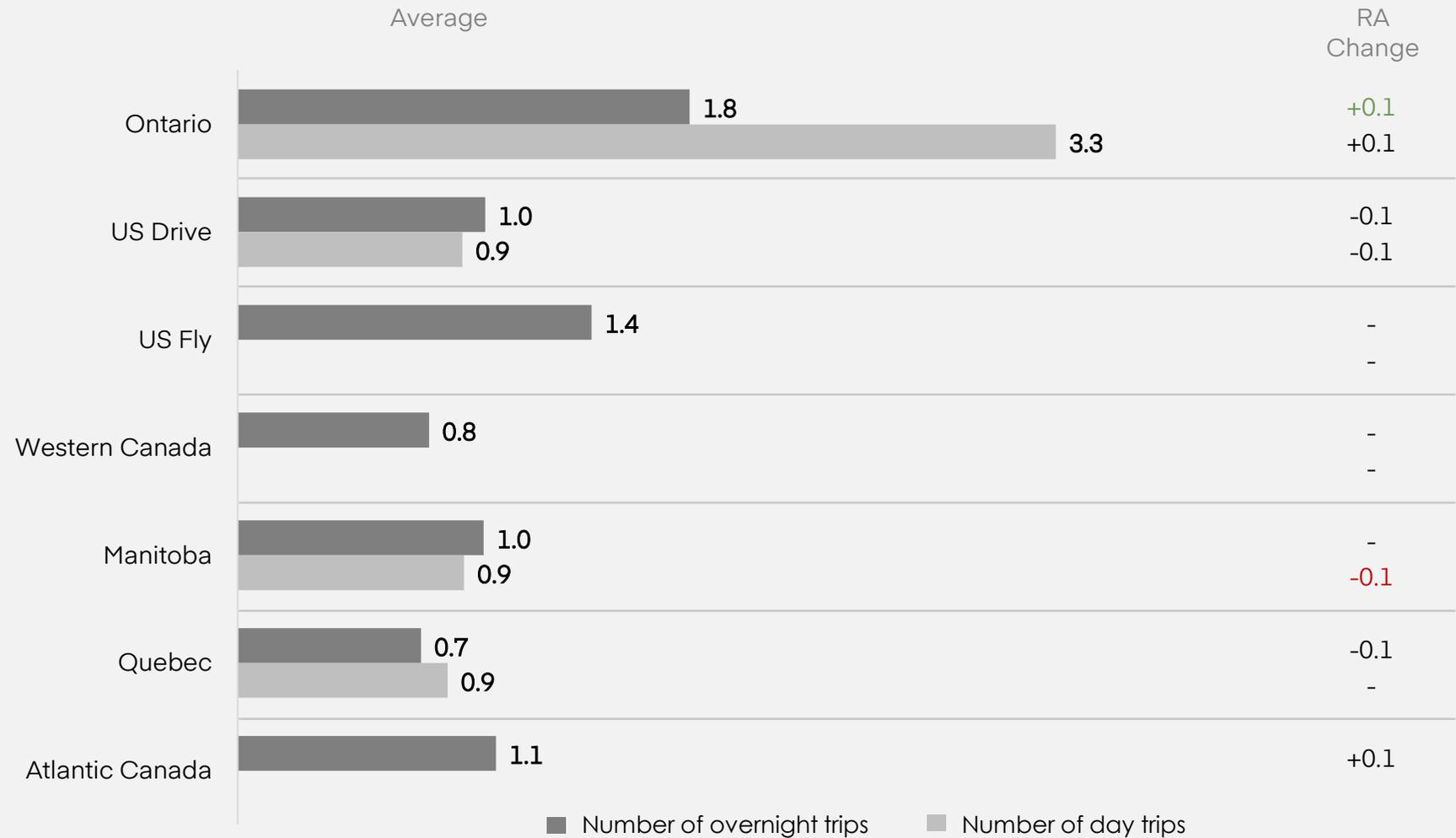
U.S. Fly, Manitoba, and Atlantic Canada follow as the next most engaged markets. However, both U.S. markets are showing a softening trend over time.



S5. In the next 12 months, how likely are you to take a pleasure trip of one or more nights in Ontario, Canada? (Excludes "don't know") (5-point scale)
 All respondents (n= 6,004)

TRAVEL PLANS IN ONTARIO – NEXT 12 MONTHS

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



S6/S9. In the next 12 months how many pleasure trips of one or more nights away from home are you planning to take in Ontario, Canada?/ In the next 12 months, how many day trips are you planning to take in Ontario, Canada? (Numeric)
 All respondents. S6 (n=6,085) / Respondents from Ontario, U.S. Drive, Manitoba, & Quebec. S9 (n=3,800)

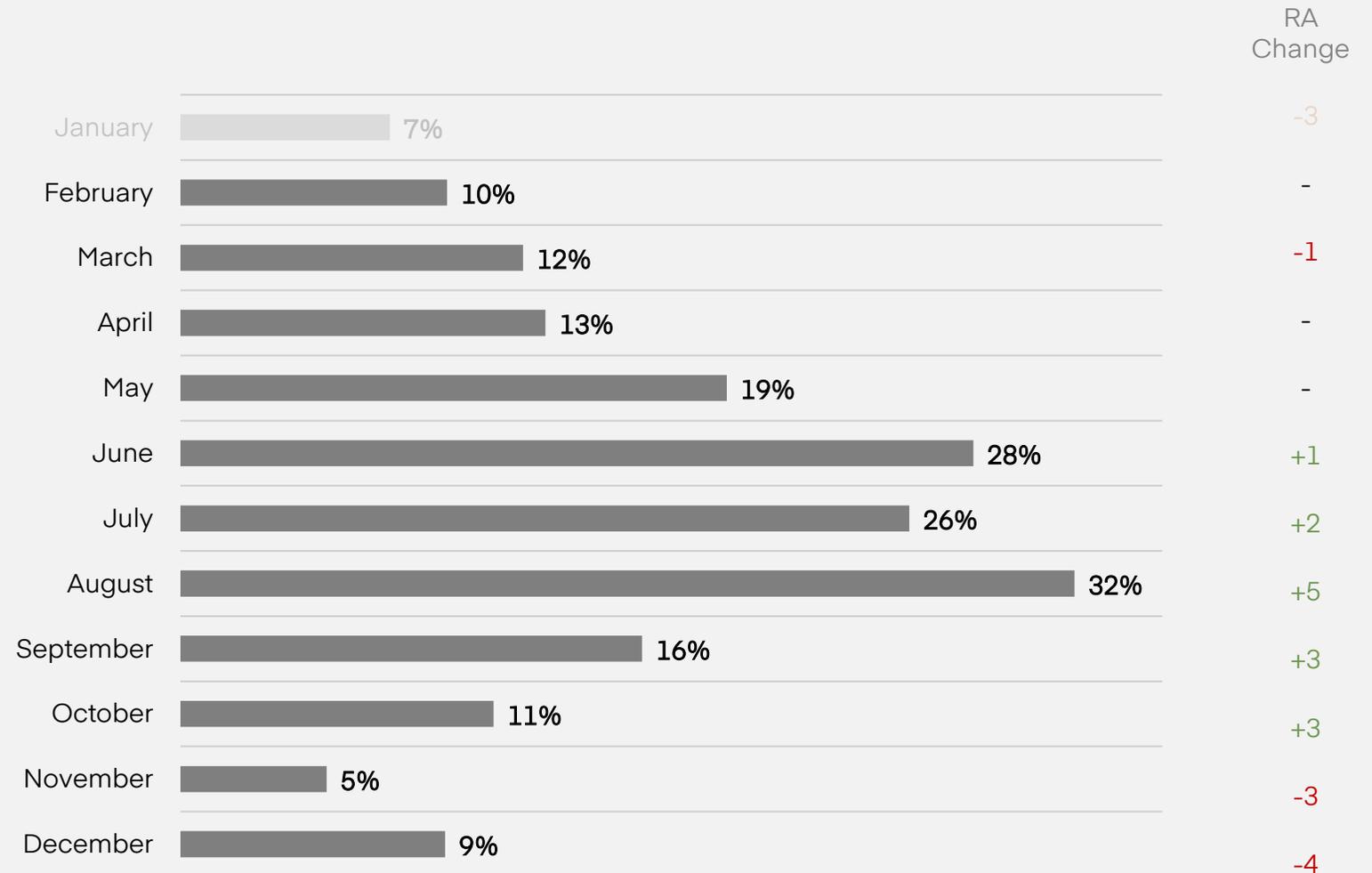
PLANNED MONTHS OF TRAVEL

Summer is the strongest period for travel to Ontario, with intent building from June (28%) into a peak in August (32%), and remaining high in July (26%).

This pattern shows that interest accelerates at the start of summer, stays elevated through mid-summer, and culminates in late summer.

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

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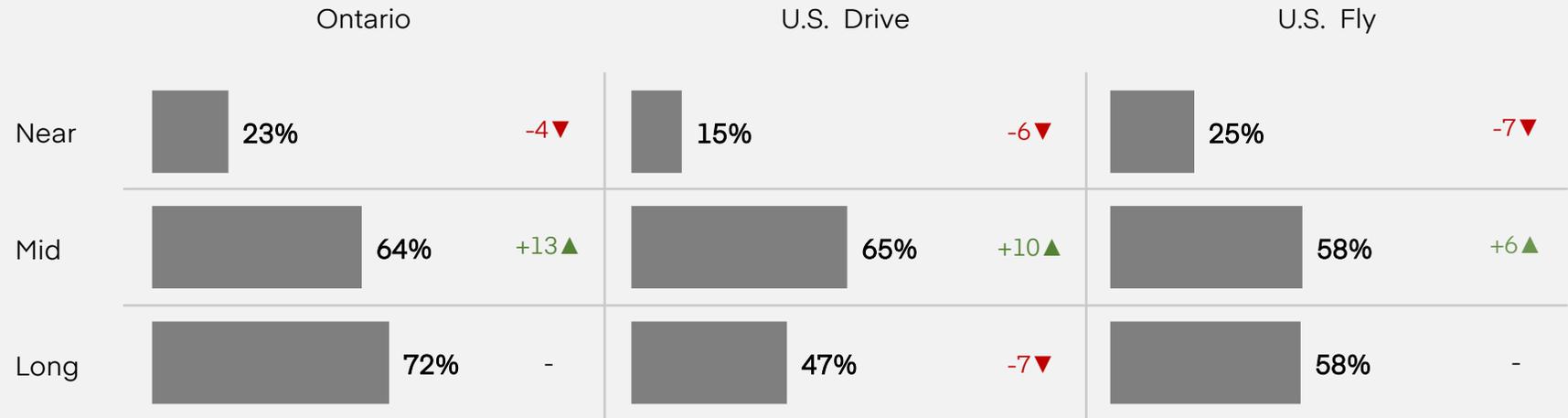
S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Multi-select)
 Respondents who are planning a trip in Ontario in the next 12 months. (n=3,513)

TRAVEL WINDOW: ONTARIO & U.S. VISITORS

The number of near-term trips to Ontario has decreased among Ontarians and U.S. travellers, showing softer immediate travel intent.

Conversely, trips planned for the mid-term period have increased. Long-term intent remains high and stable for Ontario, while it has eased somewhat in the U.S. Drive market and is holding steady for U.S. Fly.

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



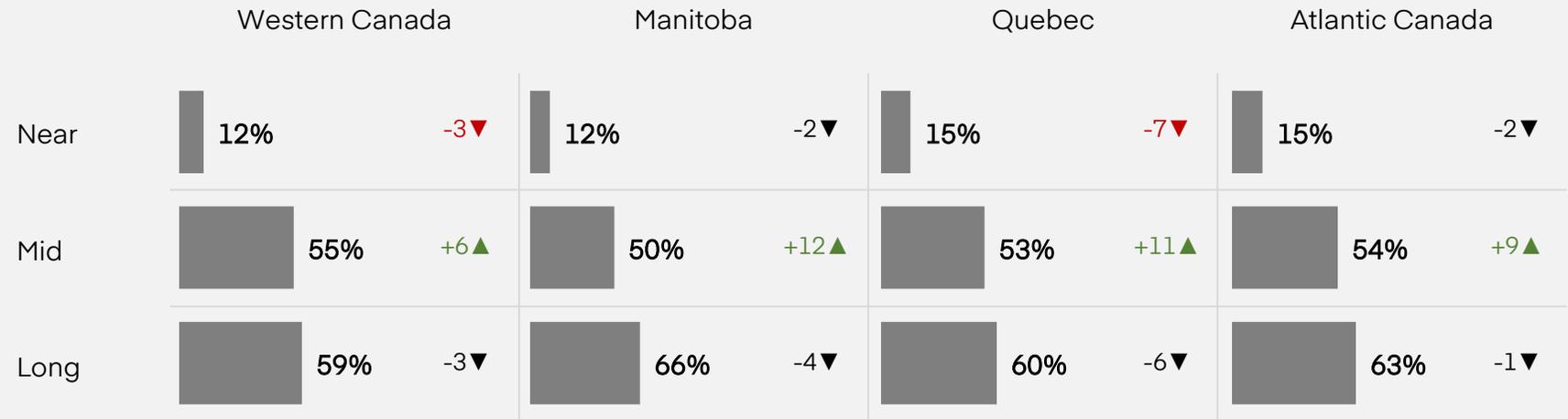
Note:
Bar = % of current month | ▲▼ = MoM Change

S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=3,708)

TRAVEL WINDOW: OTHER CANADIAN MARKETS

Near-term trip intent has softened across all Canadian regions outside Ontario, while mid-term intent has strengthened. Long-term intent, though still high, is starting to ease as some travellers shift their plans into the mid-term window.

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

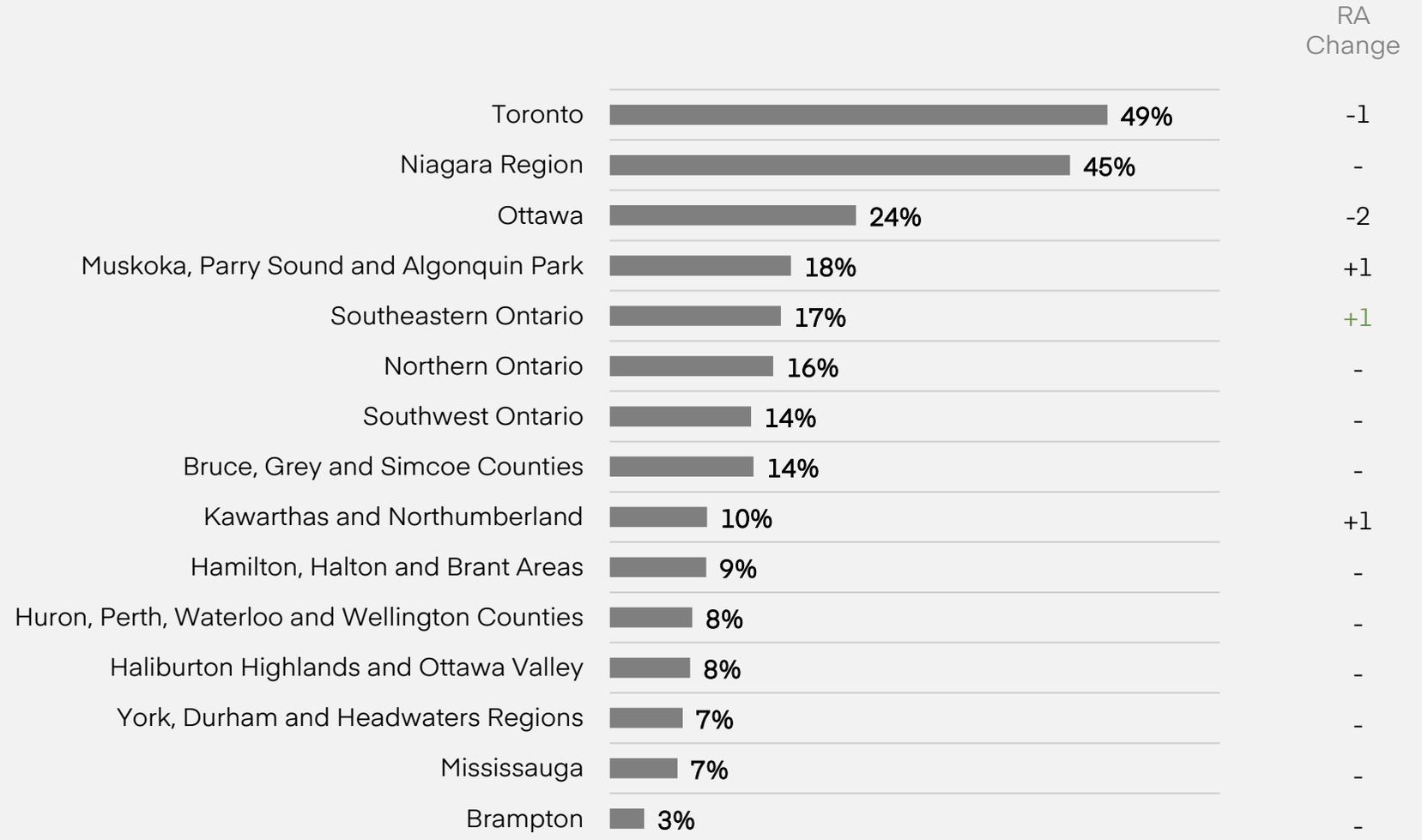


Note:
Bar = % of current month | ▲▼ = MoM Change

S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Multi-select)
Respondents who are planning a trip in Ontario in the next 12 months. (n=3,642)

DESTINATION CONSIDERATION

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



Q1B. Which destination(s) in Ontario, Canada are you seriously considering for a pleasure trip in the next 12 months?
(Multi-select)

Respondents who are planning a trip in Ontario in the next 12 months. (n=3,451)



BRAND PERCEPTION

Ontario continues to be viewed as a high-value, experience-rich destination, with especially strong perceptions in Ontario and the U.S. Fly market. Core activities such as shopping, dining, family attractions, festivals, beaches, and scenic fall drives reinforce Ontario's culturally diverse image. Advocacy is highest in Ontario, moderate but softening in U.S. Fly, and remains negative in the rest of Canada.

Tags - Explore more on DOinsights.crg.ca

Travel Season

Seasonal Activities

Rating of Ontario

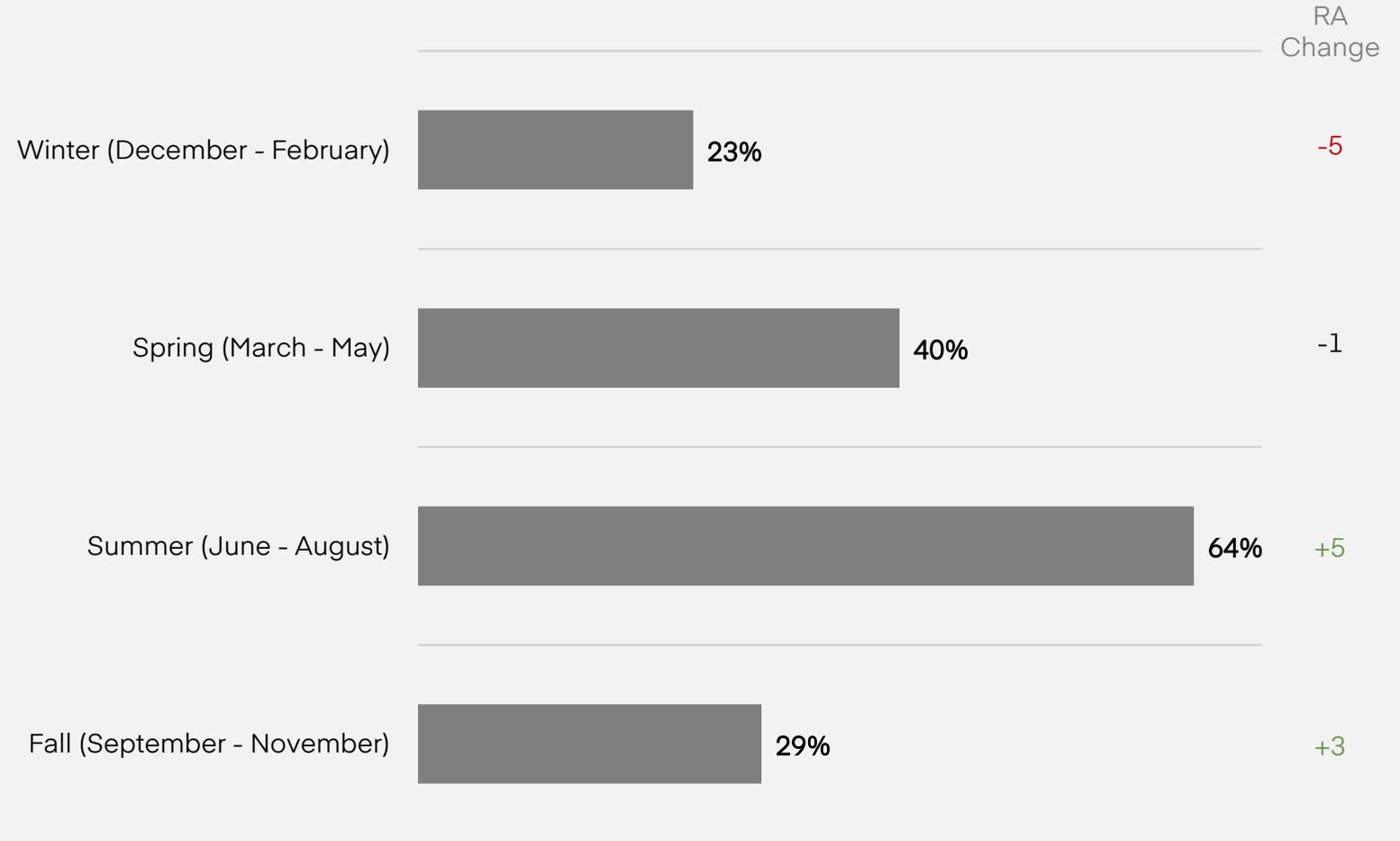
Perceived Value

SEASONAL TRAVEL INTENT

There is a clear shift toward summer travel that has strengthened over time. Summer intent has risen steadily from mid-2025 to January 2026, while winter has consistently declined, and spring has flattened after earlier gains.

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

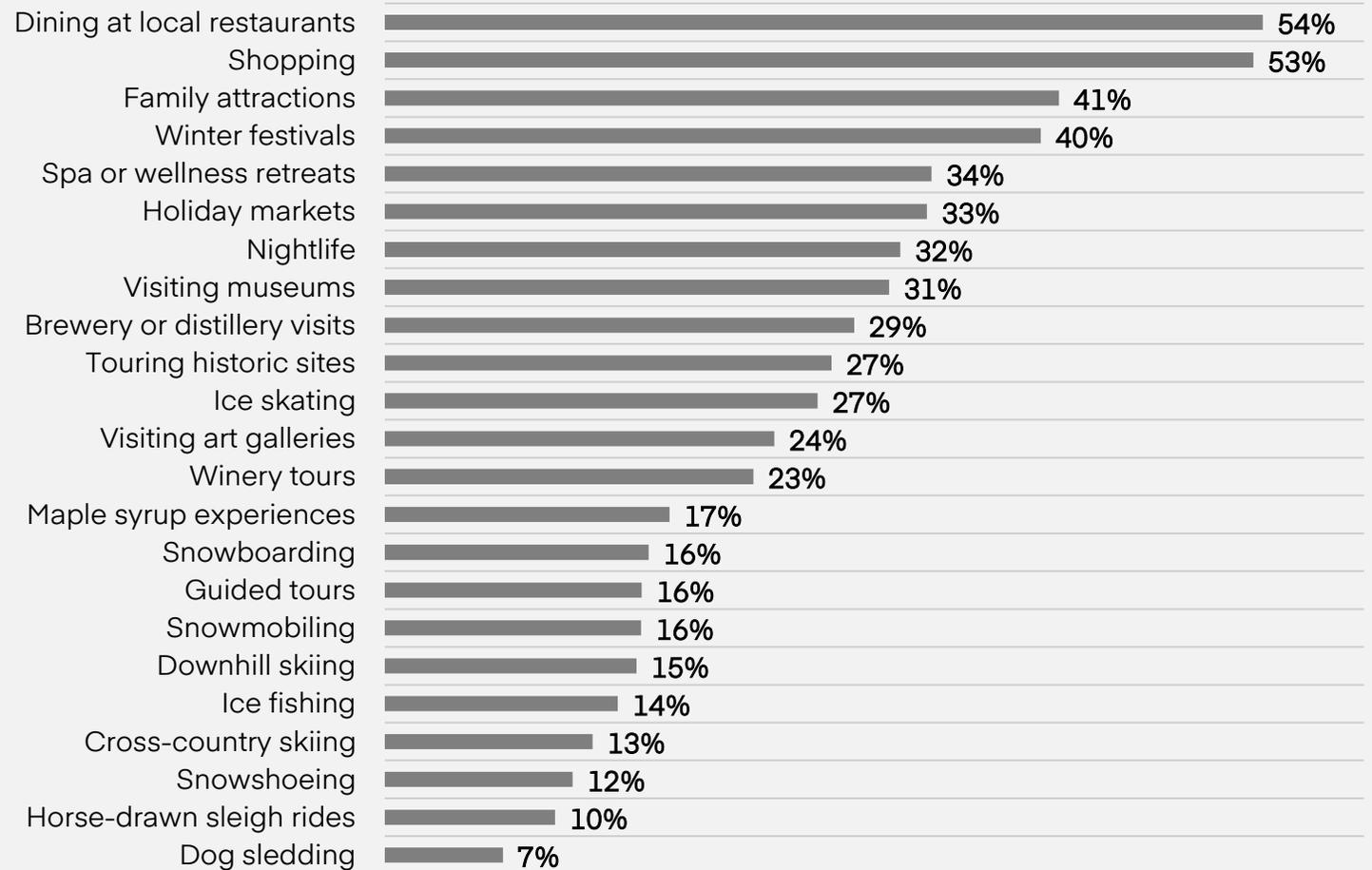
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S6B. In the next 12 months, when do you think you'll take your next pleasure trip to Ontario, Canada? (Multi-select)
 Respondents who are planning a trip in Ontario in the next 12 months. (n=3,513)

TOP WINTER ACTIVITIES

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



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

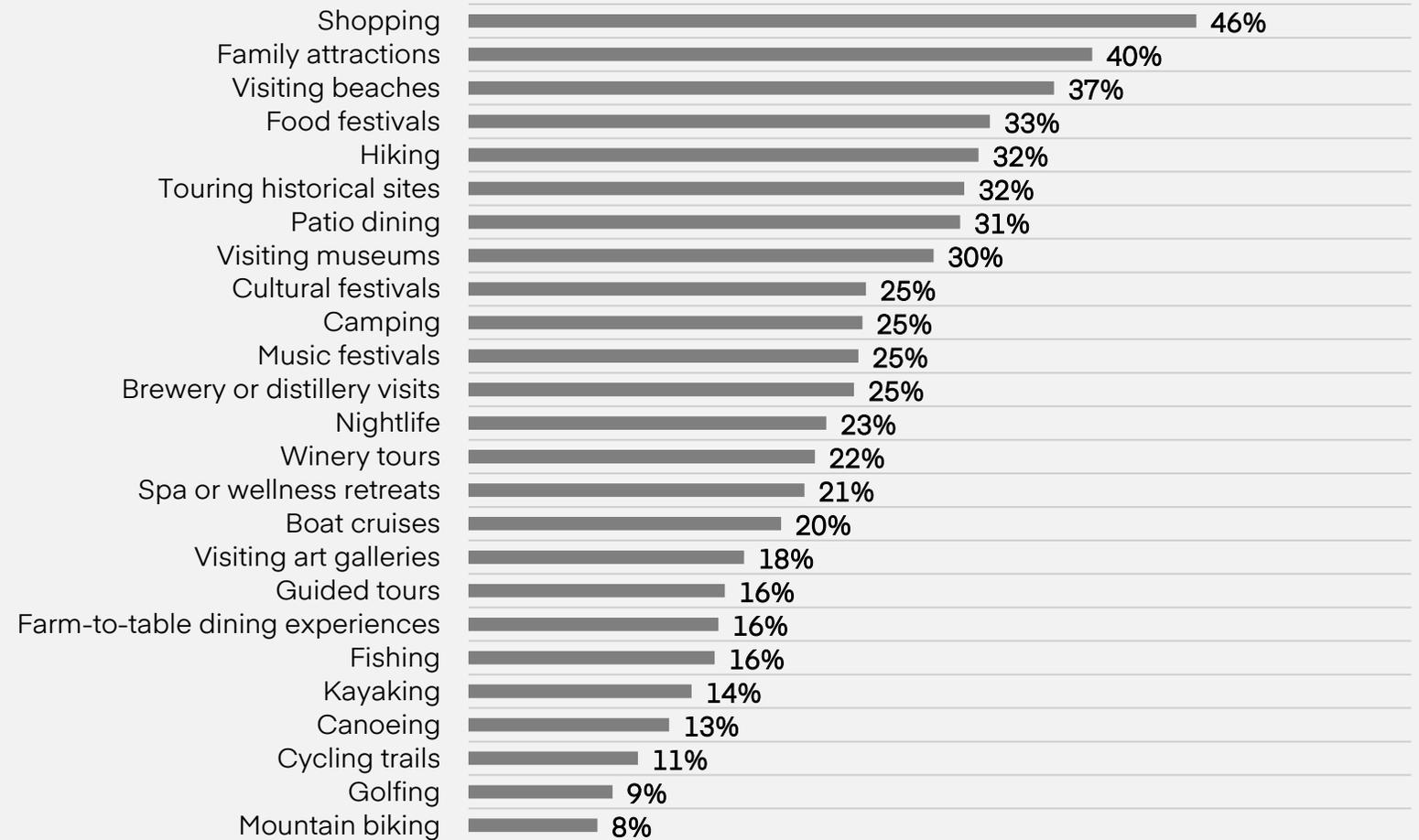
Q1BA. Thinking about your next planned pleasure trip to Ontario, Canada in the winter, which specific activities would you participate in? (Multi-select)

Respondents who are thinking about travelling during the Winter months. (n=767)

Only overall ≥ 5% shown

TOP SPRING/SUMMER ACTIVITIES

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

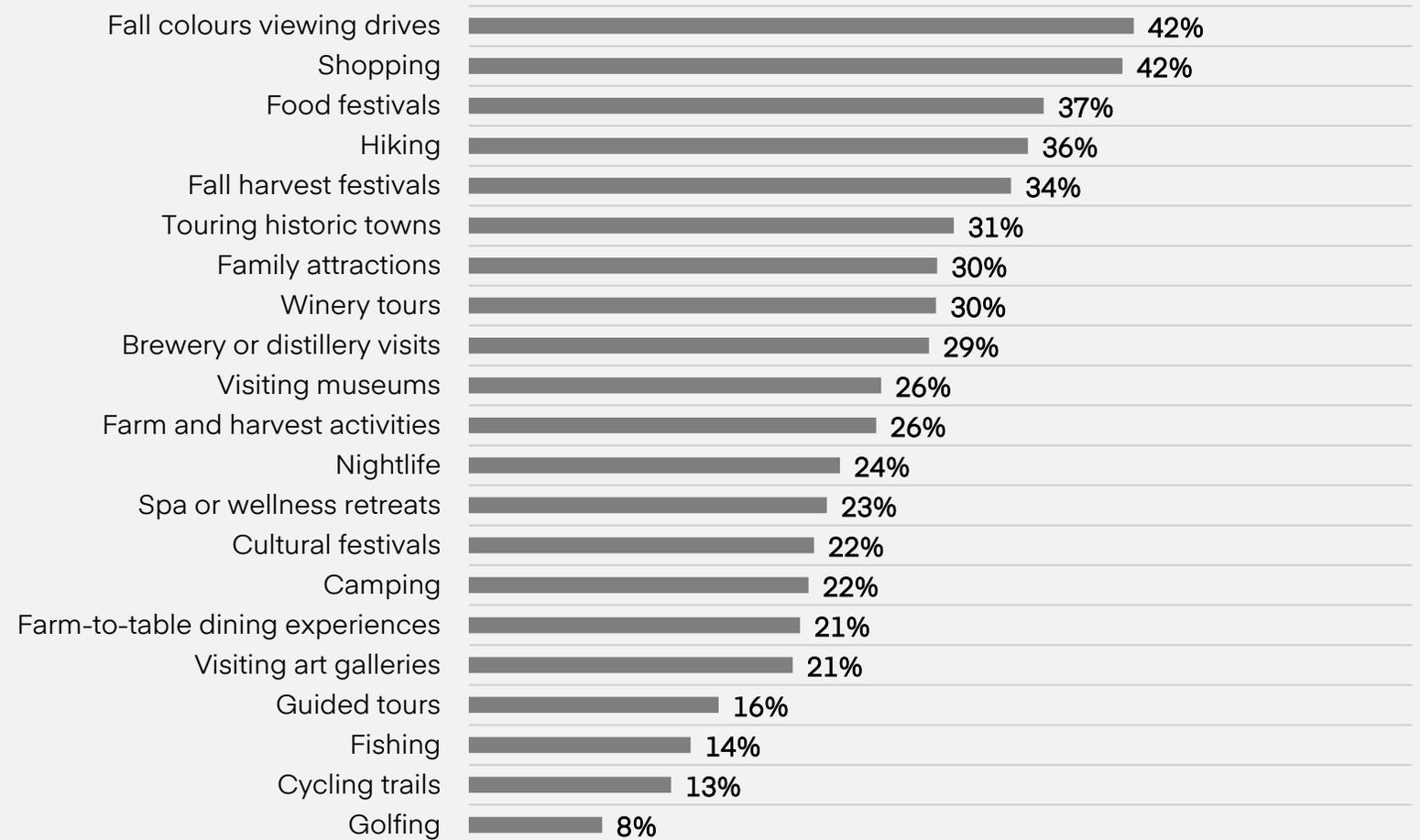


*Market analysis is available in the detailed data export on the DO Insights Portal

Q1BB. Thinking about your next planned pleasure trip to Ontario, Canada in the spring or summer, which specific activities would you participate in? (Multi-select)
 Respondents who are thinking about travelling during the Spring/Summer months. (n=2,903)
 Only overall ≥ 5% shown

TOP FALL ACTIVITIES

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

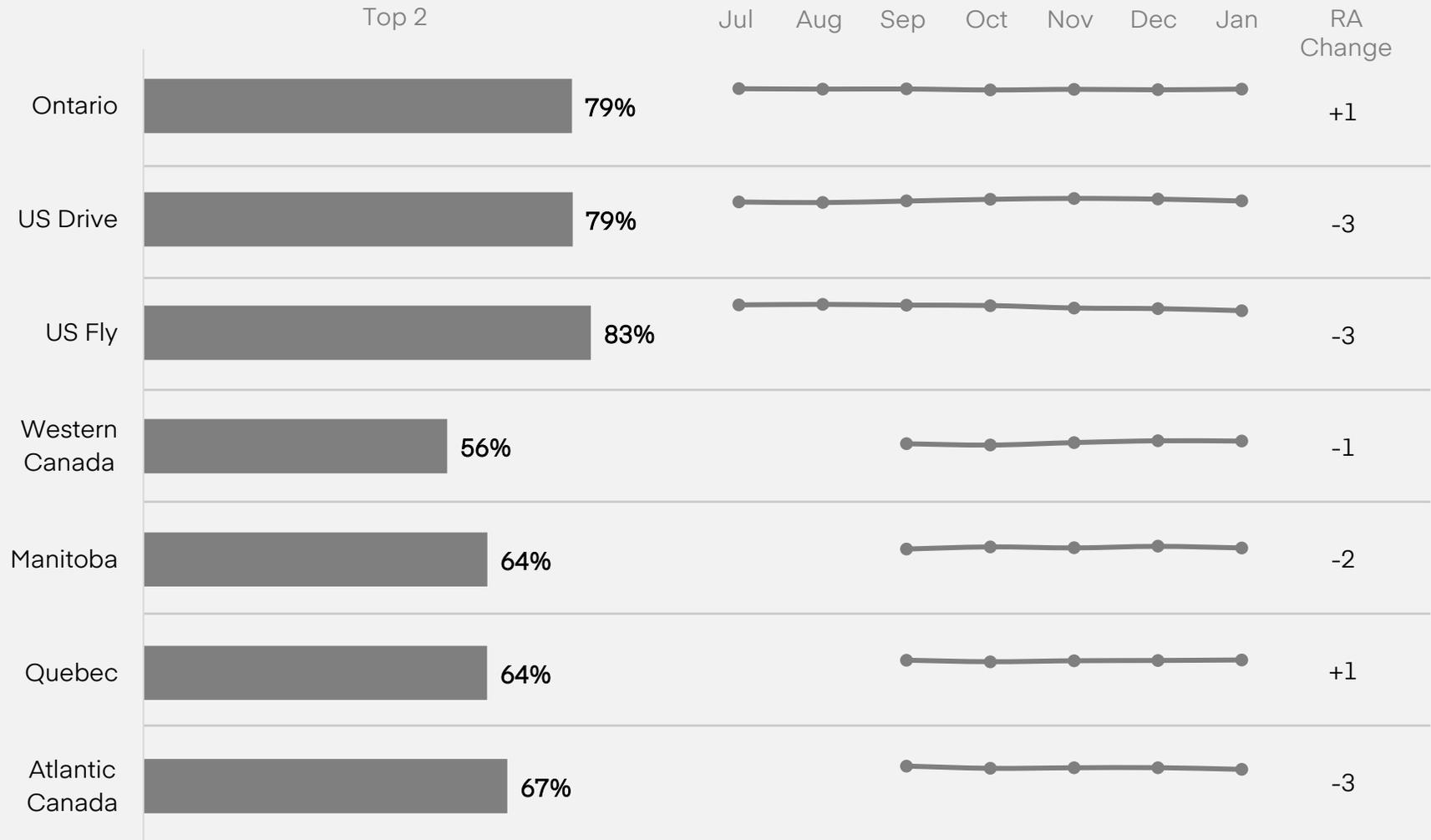


Q1BC. Thinking about your next planned pleasure trip to Ontario, Canada in the fall, which specific activities would you participate in? (Multi-select)
 Respondents who are thinking about travelling during the Fall months. (n=954)
 Only overall ≥ 5% shown

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

ONTARIO AS A PLEASURE TRAVEL DESTINATION

Ontario continues to be rated highly as a pleasure travel destination across all markets, with particularly strong appeal in the U.S. Fly segment and solid perceptions in nearby Canadian regions.

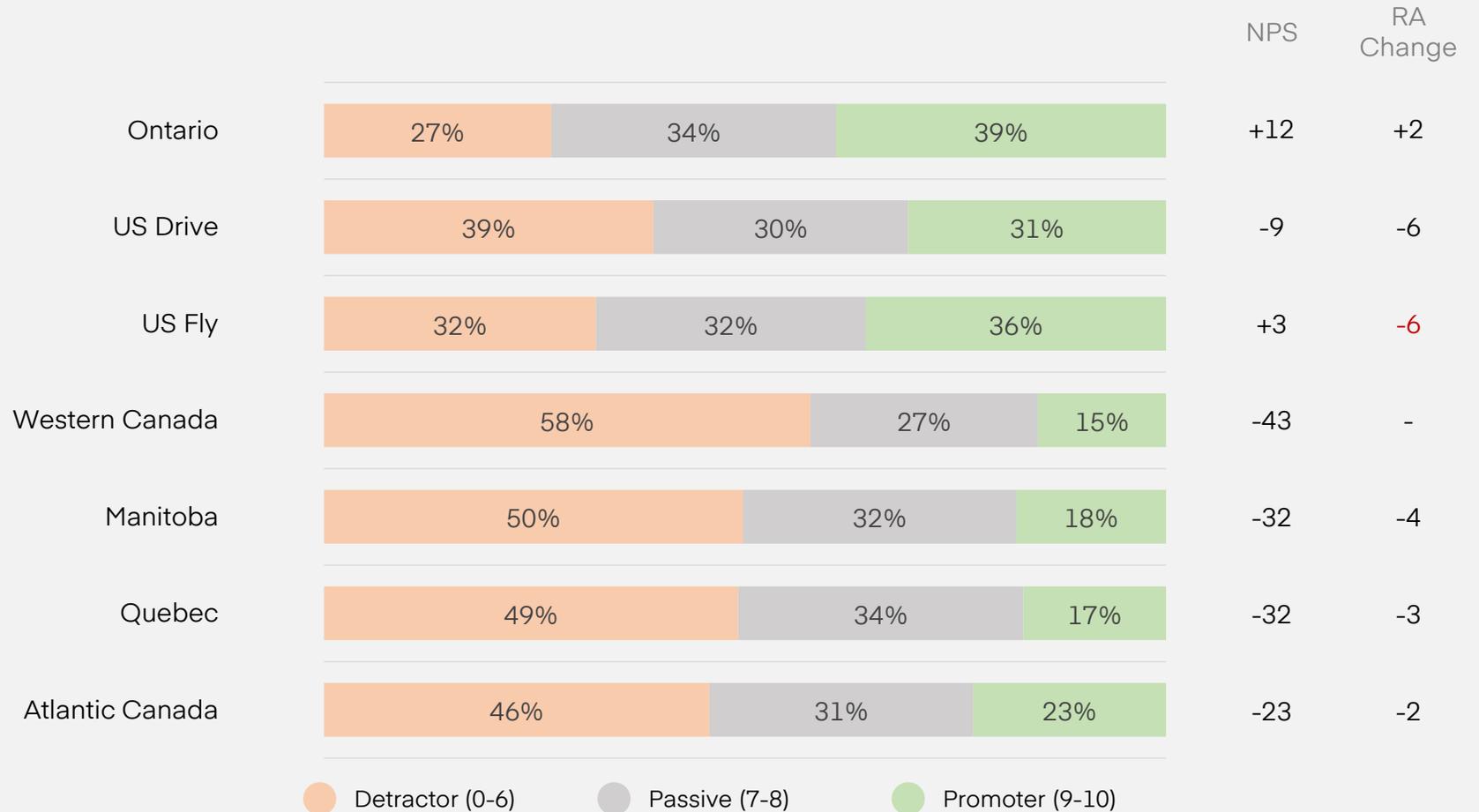


Q3. How would you rate Ontario, Canada as a pleasure travel destination? (5-point scale)
All respondents. (n=5,642)

NET PROMOTER SCORE

Ontario stands out with the strongest advocacy, showing a positive NPS and an improving trend, while U.S. Fly offers moderate advocacy that has softened.

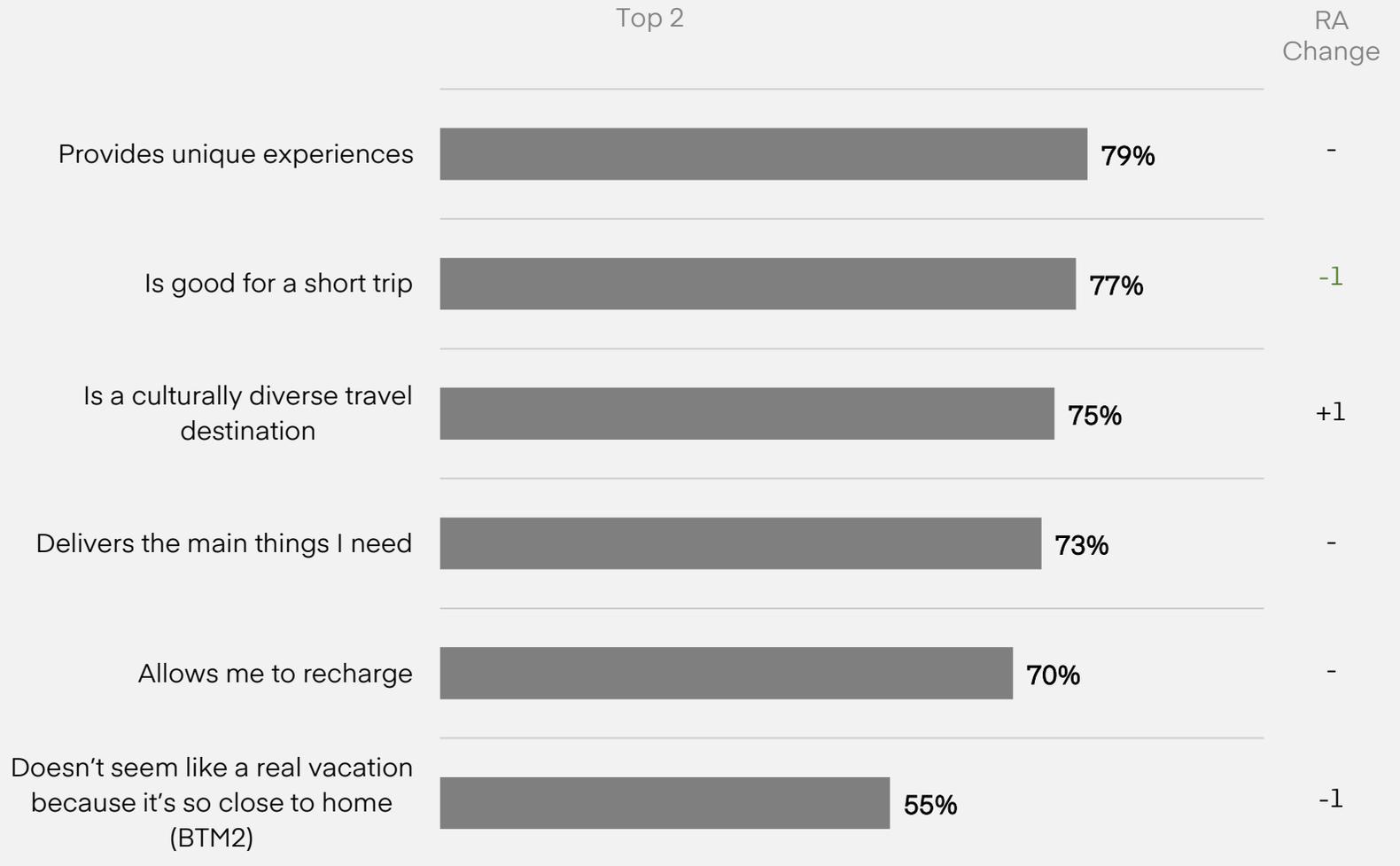
Western Canada, Manitoba, Quebec, and Atlantic Canada all sit in negative NPS territory.



Q4. How likely are you to recommend Ontario, Canada to friends or colleagues as a travel destination for a short getaway or vacation? (11-point scale)
All respondents. (n=6,085)

DESTINATION IMAGE OF ONTARIO

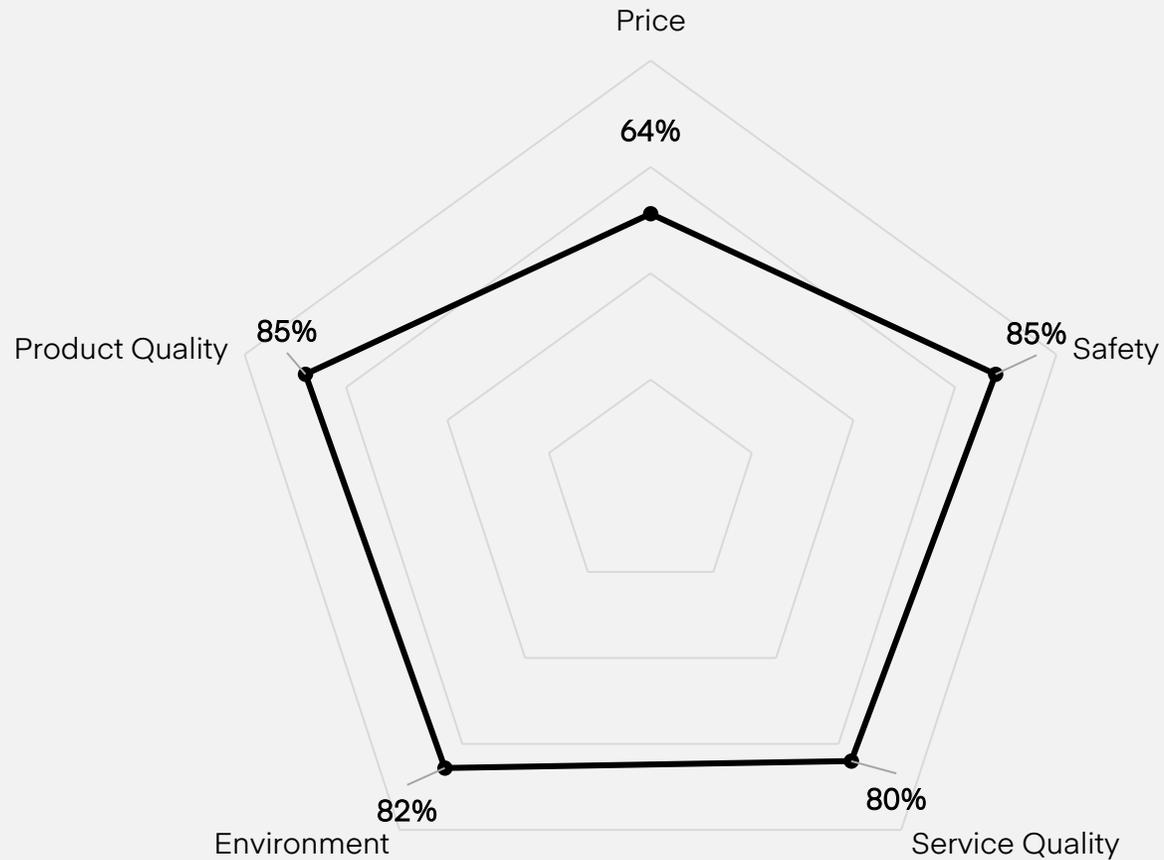
Ontario is widely recognized for delivering unique experiences and remains a top choice for short trips and for being a culturally diverse travel destination.



Q5. Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...?
 (Excludes "don't know") (5-point scale)
 All respondents. (n=5,519)

CONSUMER PERCEIVED VALUE

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



Q6. Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...? (Excludes "don't know") (5-point scale)
All respondents. (n=1,170)



📍 Terrace Bay Beach

TRAVEL INFORMATION RESEARCH

Looking for travel information is particularly strong among U.S. Fly visitors and has remained consistently high over recent months. General internet search, online booking or review sites, and social media are the main sources used to plan Ontario trips, with Instagram, YouTube, and Facebook leading among platforms. Interest in using AI tools for trip planning is highest among U.S. travellers, particularly U.S. Fly, and these tools are mainly used to research attractions, find destination ideas, and gather travel tips.

Tags - Explore more on DOinsights.crg.ca

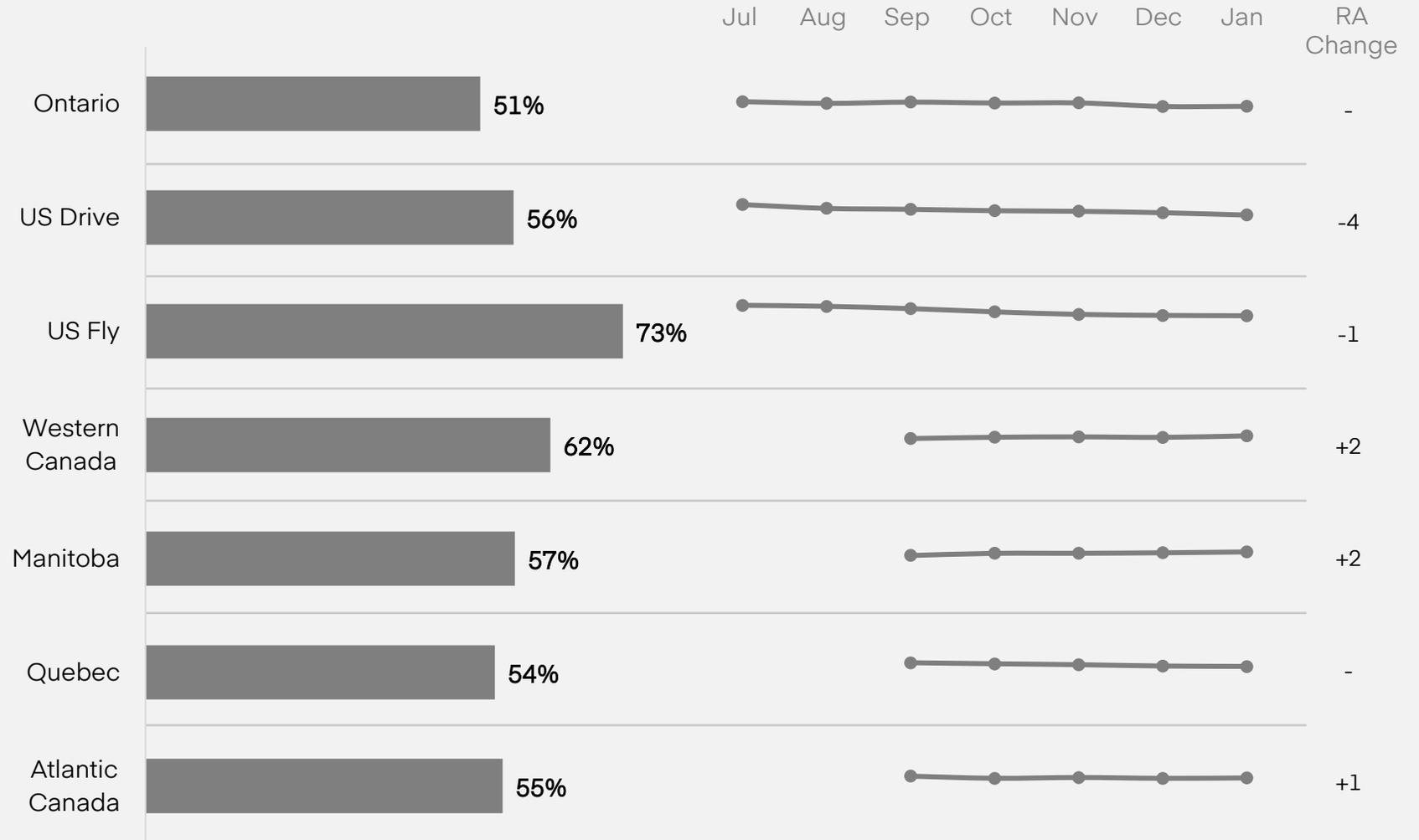
Travel Information

Media Usage

AI tools

INFORMATION SEARCH

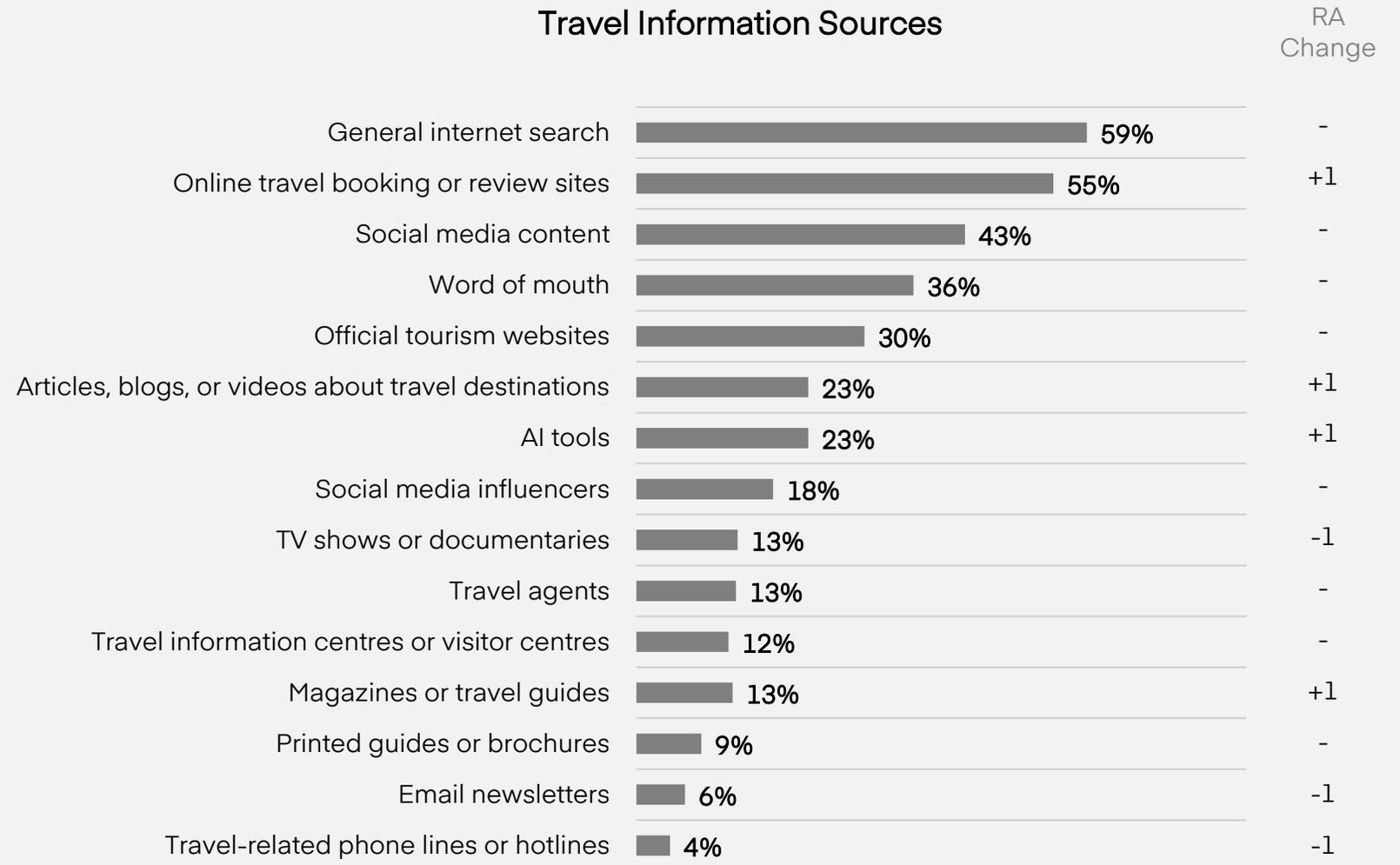
Looking for travel information is highest among U.S. Fly visitors, but engagement from this market has been easing over recent months. This marks the sixth month of this trend.



ONTARIO TRAVEL INFORMATION SOURCES

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

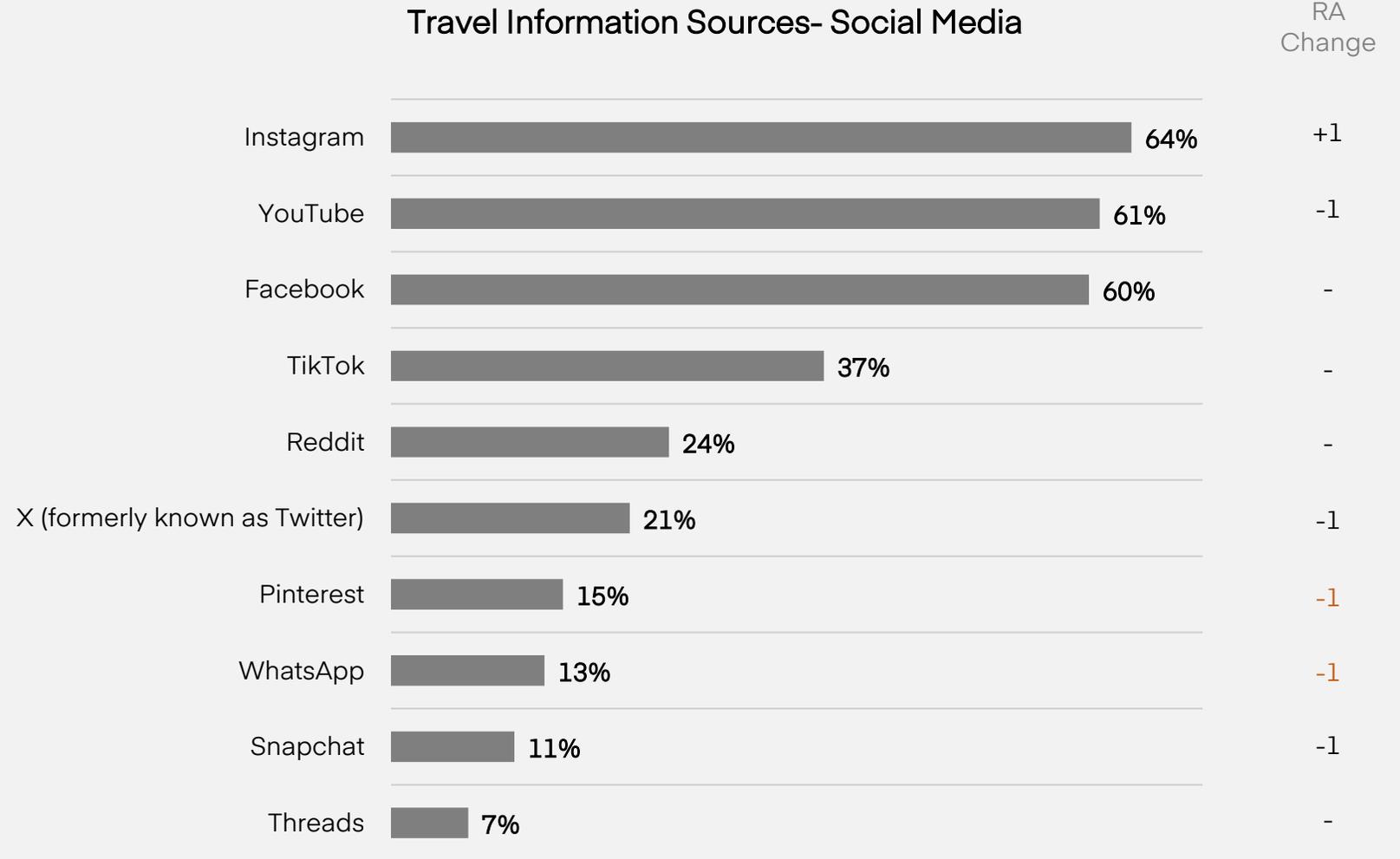
Travel Information Sources



I2. Which of the following sources did you use to obtain information about travelling within Ontario, if any? (Multi-select)
 Respondents who have looked for information. (n=3,490)
 Only overall ≥ 5% shown

SOCIAL MEDIA USAGE FOR TRAVEL INFORMATION

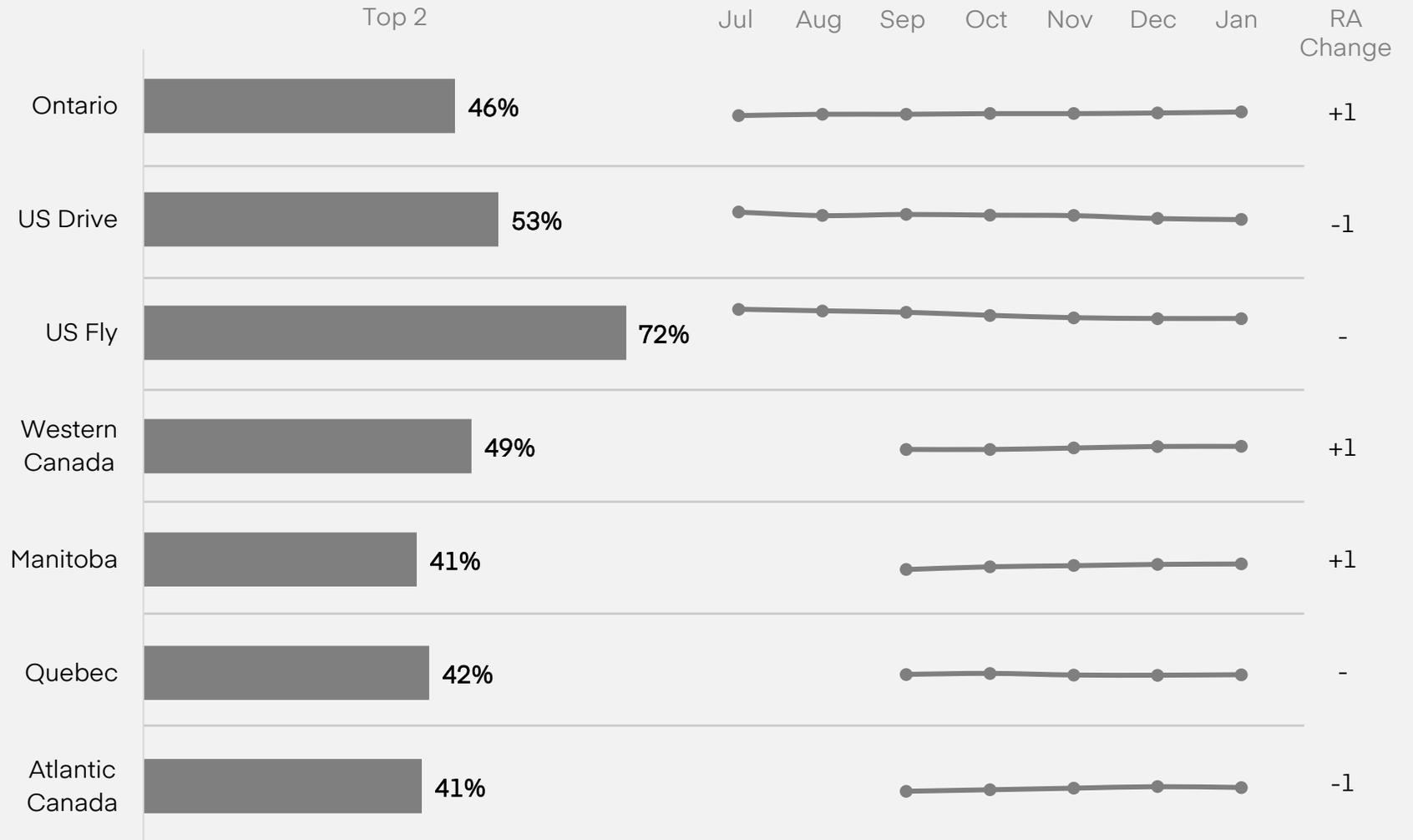
Instagram, YouTube, and Facebook are the leading social media platforms used by travellers to obtain information about travelling, with Instagram being the most popular.



I3. Which social media platforms did you use to obtain information about travelling? (Multi-select)
 Respondents who use social media for travel information. (n=1,714)
 Only overall ≥ 5% shown

LIKELIHOOD OF USING AI TOOLS

Interest in using AI tools for trip planning is highest among U.S. travellers, especially the Fly market, though it has been softening over the past several months. Ontario and other Canadian regions show more moderate but stable intent.

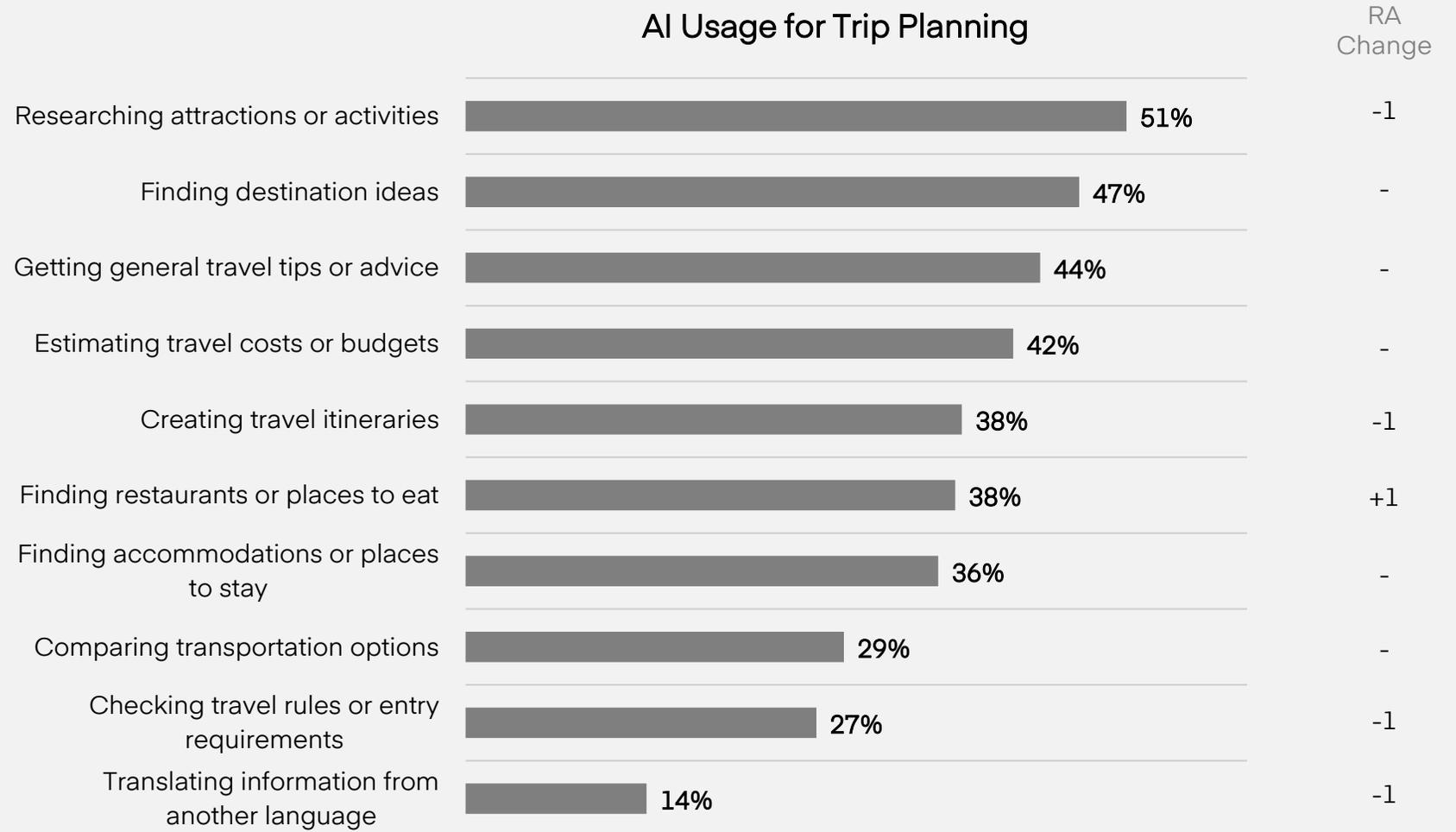


16. How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next trip? (Excludes "don't know") (5-point scale)
 Respondents who plan to take an overnight trip. (n=5,636)

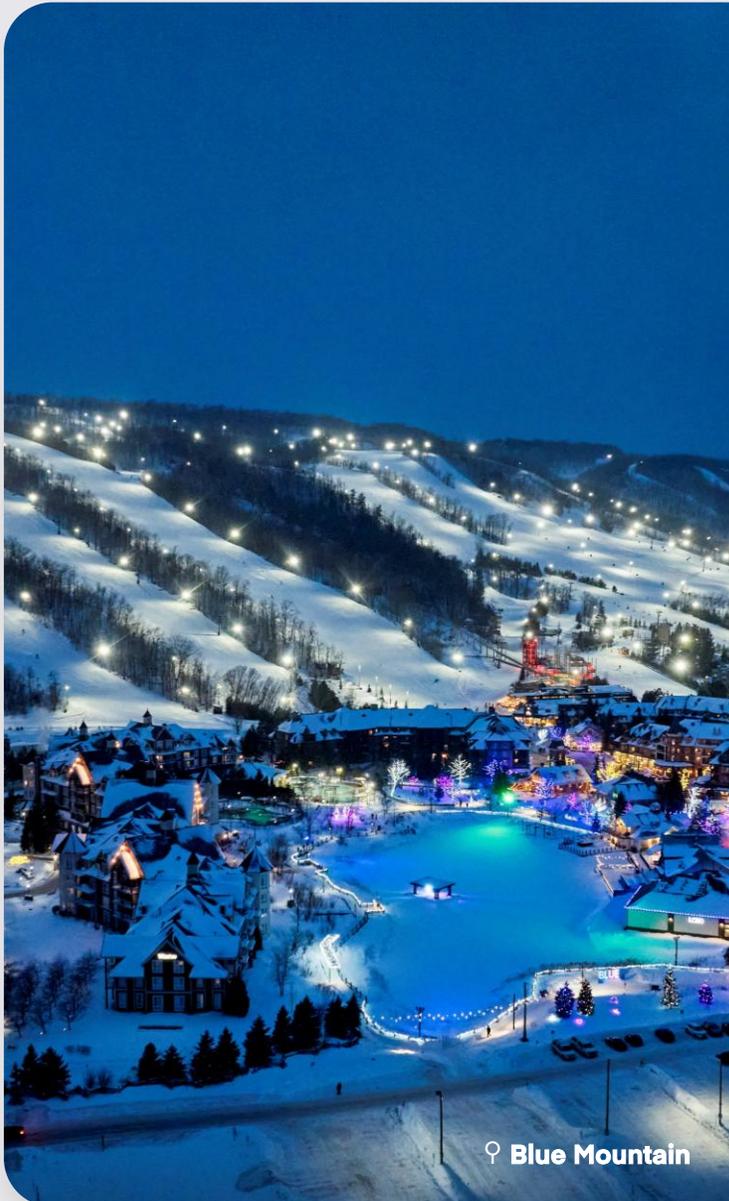
AI ASSISTANCE IN TRAVEL PLANNING

Travellers primarily use AI tools to research attractions, discover destination ideas, and get travel tips, making these the top ways AI is integrated into trip planning. This pattern has been consistent with previous months.

AI Usage for Trip Planning



15. How did you use AI tools when planning your trip(s)? (Multi-select)
 Respondents who used AI tools to help plan a trip in the past 12 months. (n=1,870)
 Only overall ≥ 5% shown



📍 Blue Mountain

PERCEPTION OF ECONOMIC AND POLITICAL CONDITIONS

Travel attitudes remain stable overall, though differences by market are becoming more pronounced. U.S. Fly travellers continue to see travel as a strong investment, while Quebec remains notably less convinced, reinforcing an ongoing value disconnect. The exchange rate continues to lose influence, suggesting price alone is no longer driving intent. Financial pressure remains uneven, with Manitoba and Atlantic Canada most affected, while Ontario travellers continue to favour in-province travel due to global instability and the U.S. political climate.

Tags - Explore more on DOinsights.crg.ca

Political Concerns

Exchange Rate

Financial Pressures

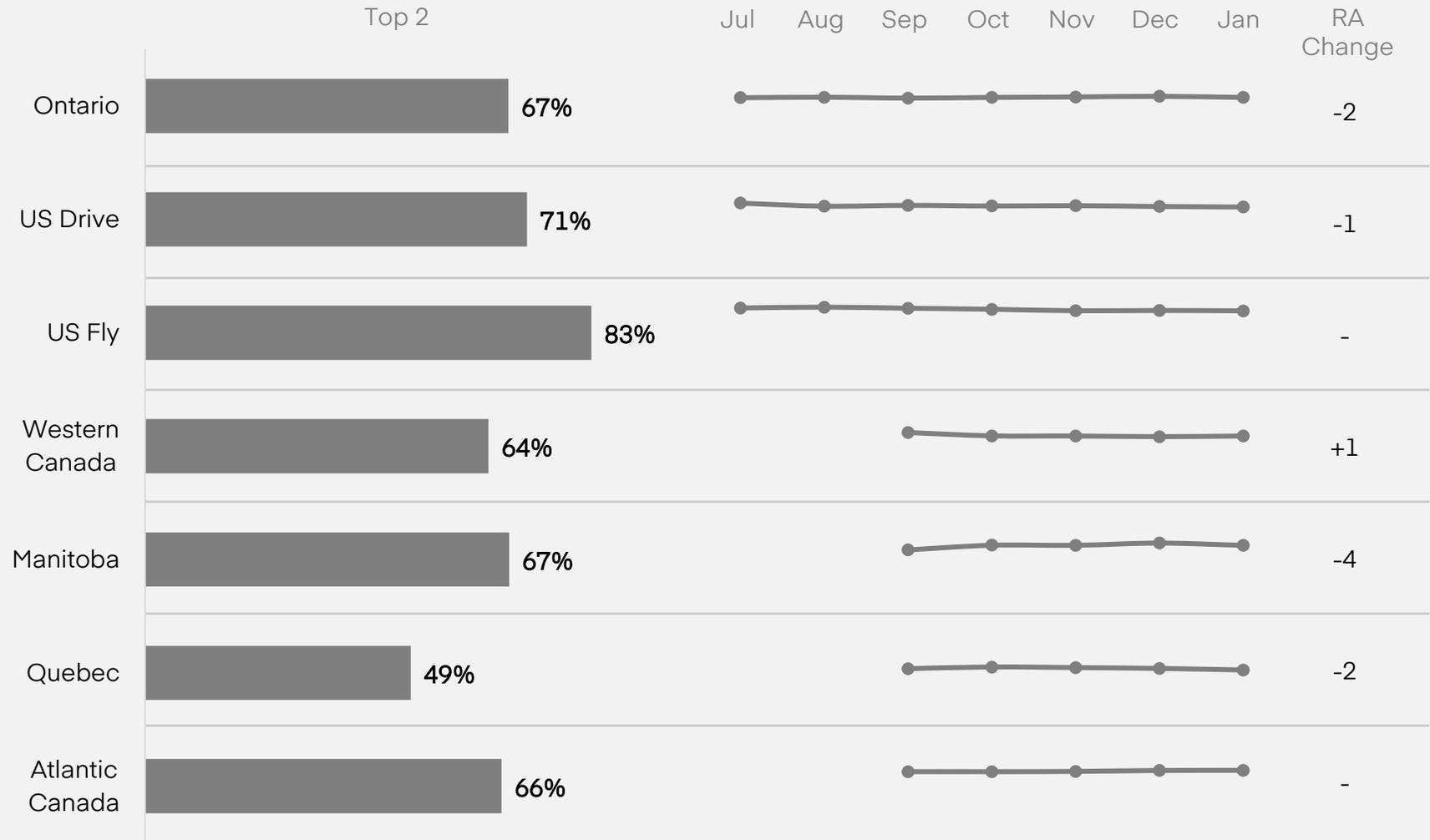
Payment Plans

TRAVEL AS A WORTHWHILE INVESTMENT

Travel is seen as a worthwhile investment primarily among U.S. Fly travellers, who show the highest levels of agreement, while Quebec reports notably lower agreement.

Manitoba travellers showed an increase in agreement last month (continuing the upward trend since July), followed this month by a decline, bringing attitudes back in line with previous months.

Despite ongoing economic pressures, attitudes toward travel have remained relatively stable across regions.



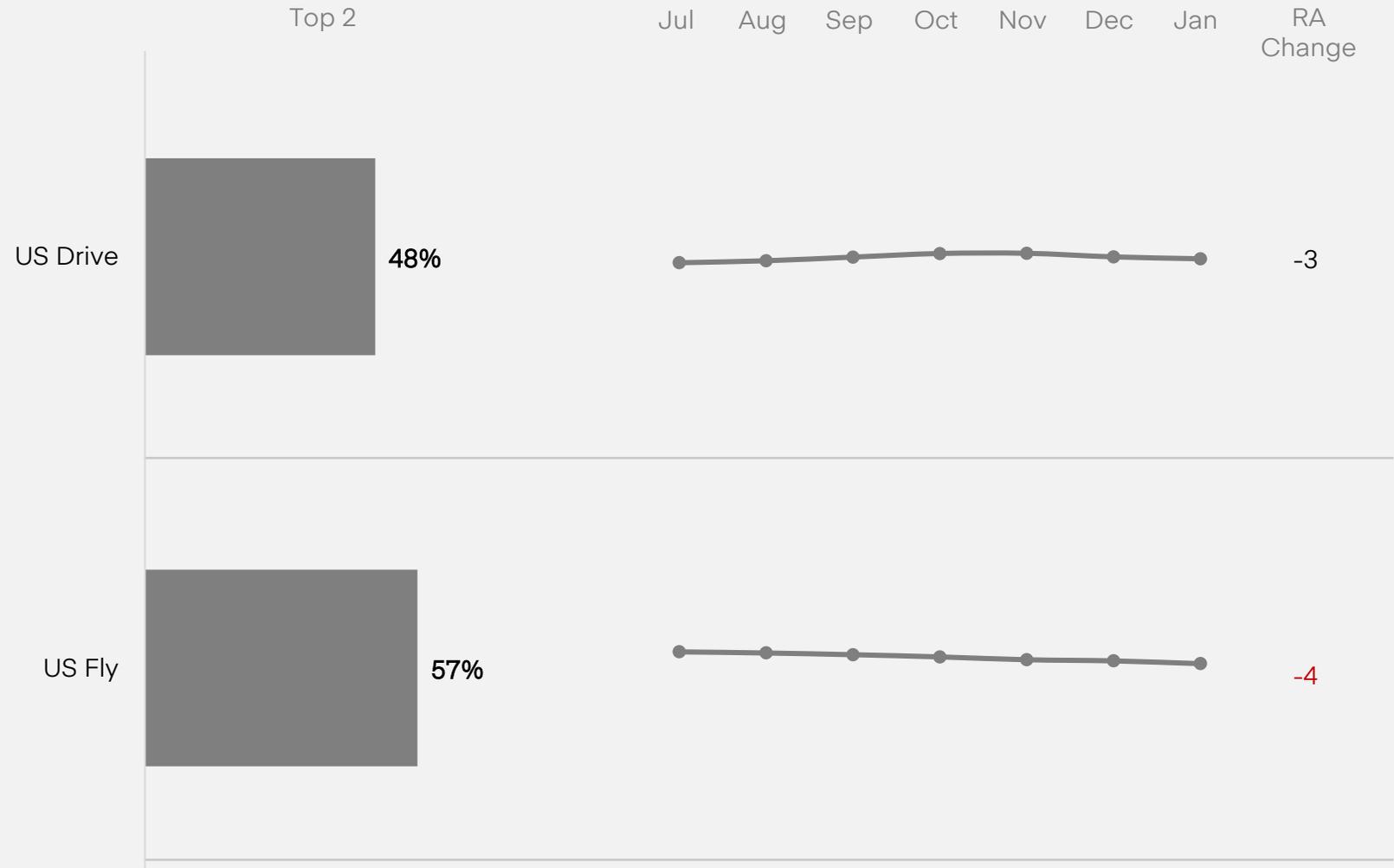
T4. How much do you agree or disagree with the following statements? [I feel travel is a worthwhile investment, even in the current economic climate.] (Excludes "don't know") (5-point scale)
All respondents. (n=5,950)

INFLUENCE OF EXCHANGE RATE ON TRAVEL TO ONTARIO

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

There has been a significant decline among U.S. Fly travellers, marking the sixth consecutive month of decrease, while U.S. Drive travel has entered its second month of decline.

Within the U.S. Fly market, declines are evident across age groups and regions, with particularly pronounced softening in Illinois, New York City, and among travellers aged 55–64.



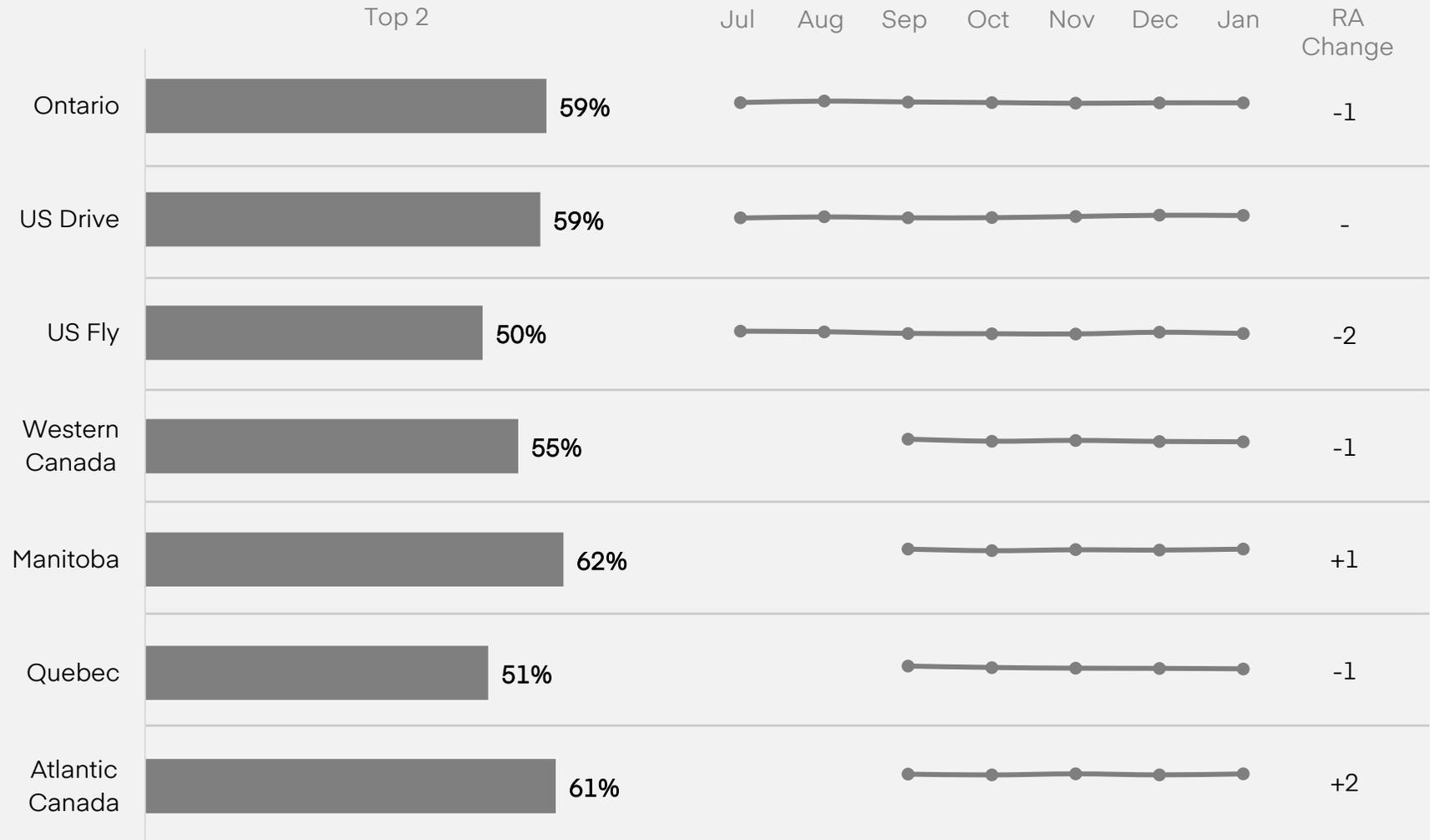
T4. How much do you agree or disagree with the following statements? [I am more likely to travel to Ontario, Canada in the next 12 months because of the favourable exchange rate.] (Excludes "don't know") (5-point scale)
 All respondents from U.S. Drive and U.S. Fly. (n=1,445)

FINANCIAL PRESSURES IMPACTING FUTURE TRAVEL PLANS

Financial pressures continue to impact travel plans across regions.

Manitoba and Atlantic Canada remain the most affected, while U.S. fly travellers and Quebec report being the least affected.

Even though Quebec travellers report lower concern about financial pressures, they are less likely to see travel as a worthwhile investment. This suggests travel is viewed more as an optional expense than something to prioritize. In contrast, U.S. Fly travellers are most likely to see travel as an investment and, when facing financial pressure, cut back on their travel budgets.



T5. How much do you agree or disagree with the following statement? [Financial pressures have impacted my travel plans in the next 12 months] (Excludes "don't know") (5-point scale)
All respondents. (n=6,040)

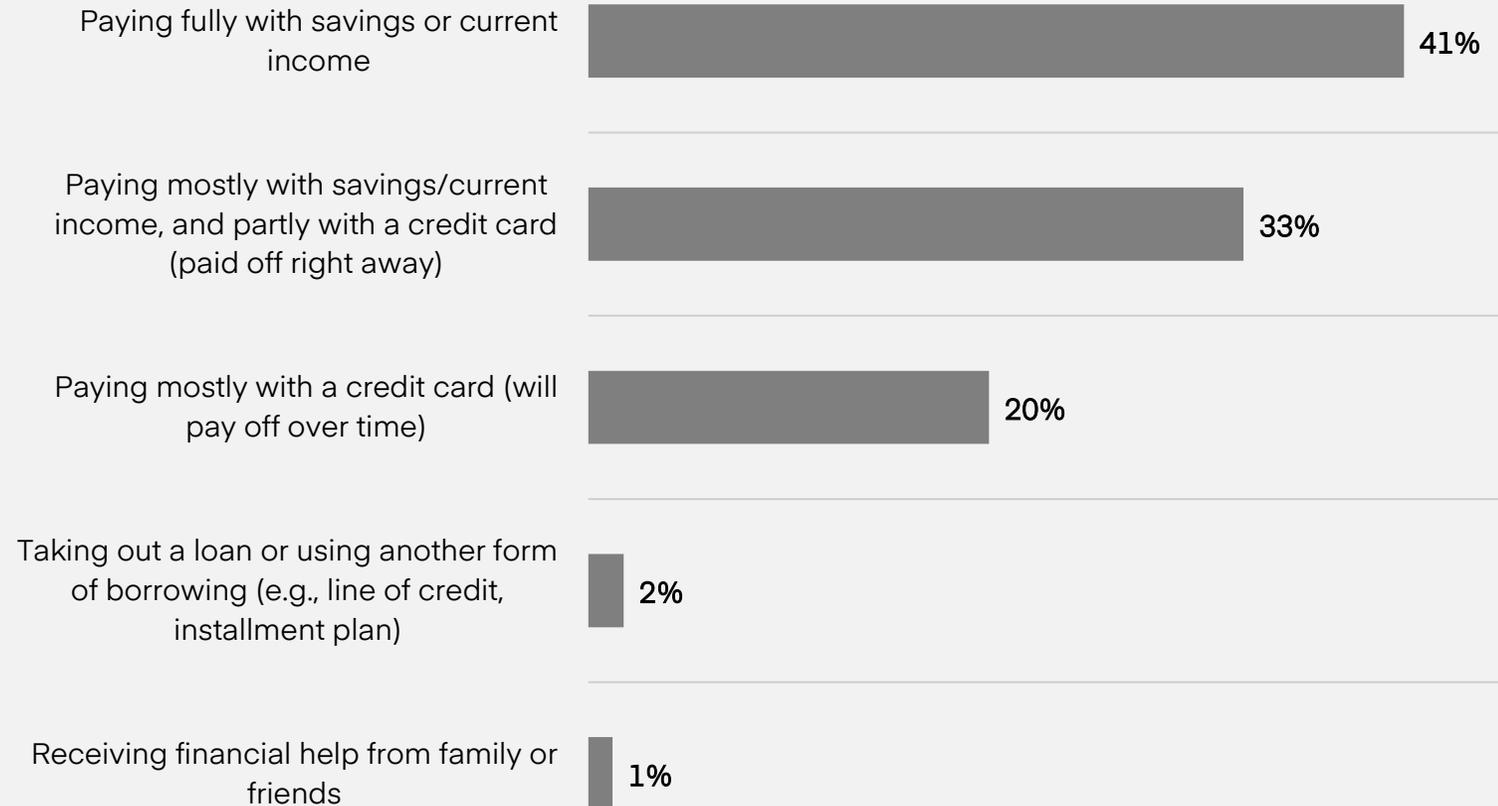
TRAVEL PLAN PAYMENT

Travellers continue to fully fund their pleasure trips through savings or current income, followed by those relying mostly on savings and partly on credit cards.

In contrast, Quebec travellers are more likely to rely on a mix of savings and credit to fund their trips. Among those experiencing financial pressure, this aligns with a tendency toward shorter or more affordable travel, reinforcing the view of travel as a cost to be managed rather than an investment to protect.

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

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T7. People use different ways to pay for pleasure trips. Which of the following best describes how you usually pay for pleasure trips? (Single-Select)

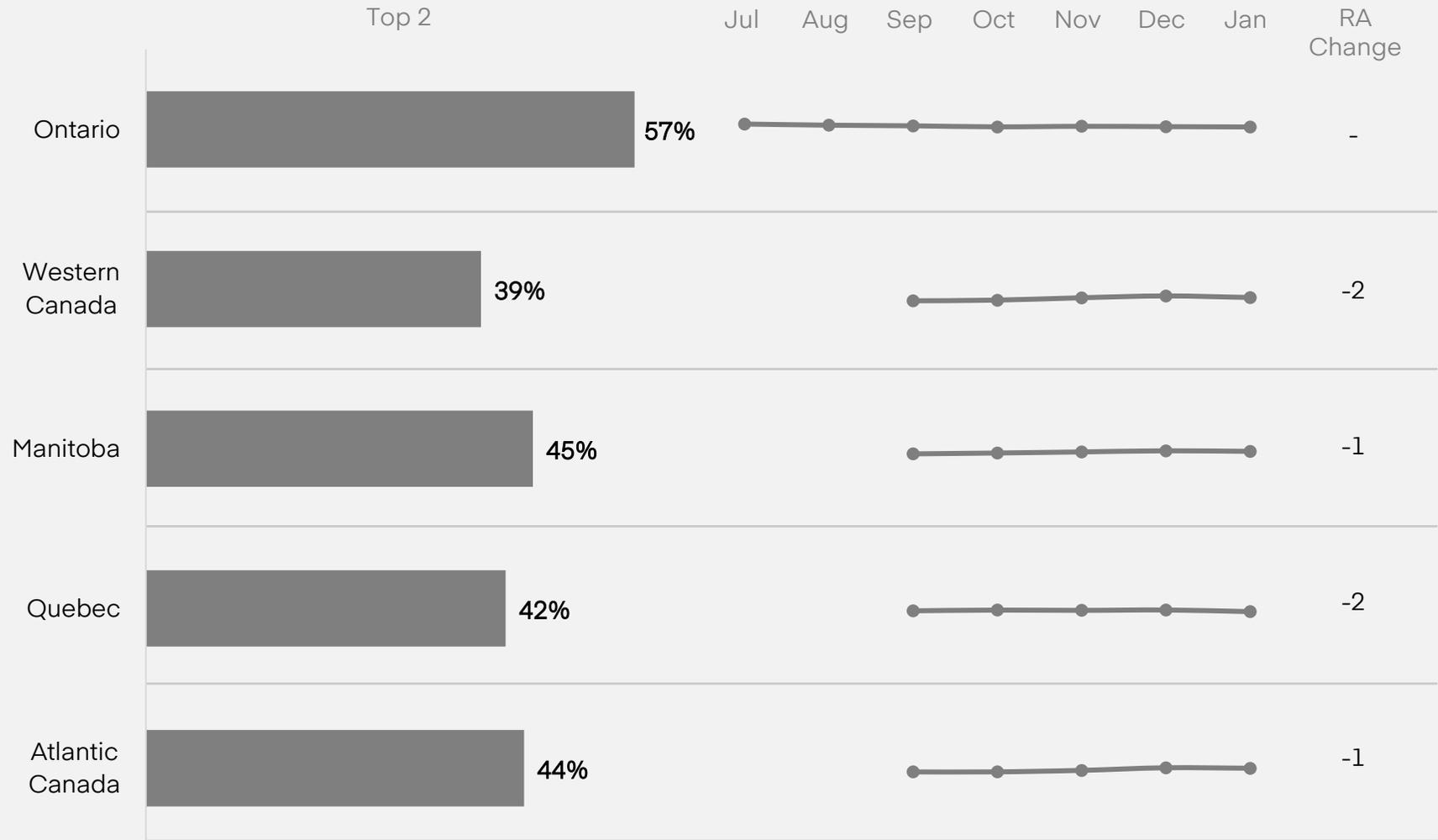
All respondents. (n=6,085)

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

IMPACT OF INTERNATIONAL EXCHANGE RATES ON DOMESTIC TRAVEL

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

Other Canadian regions remain relatively stable in their likelihood to travel to Ontario for this reason.



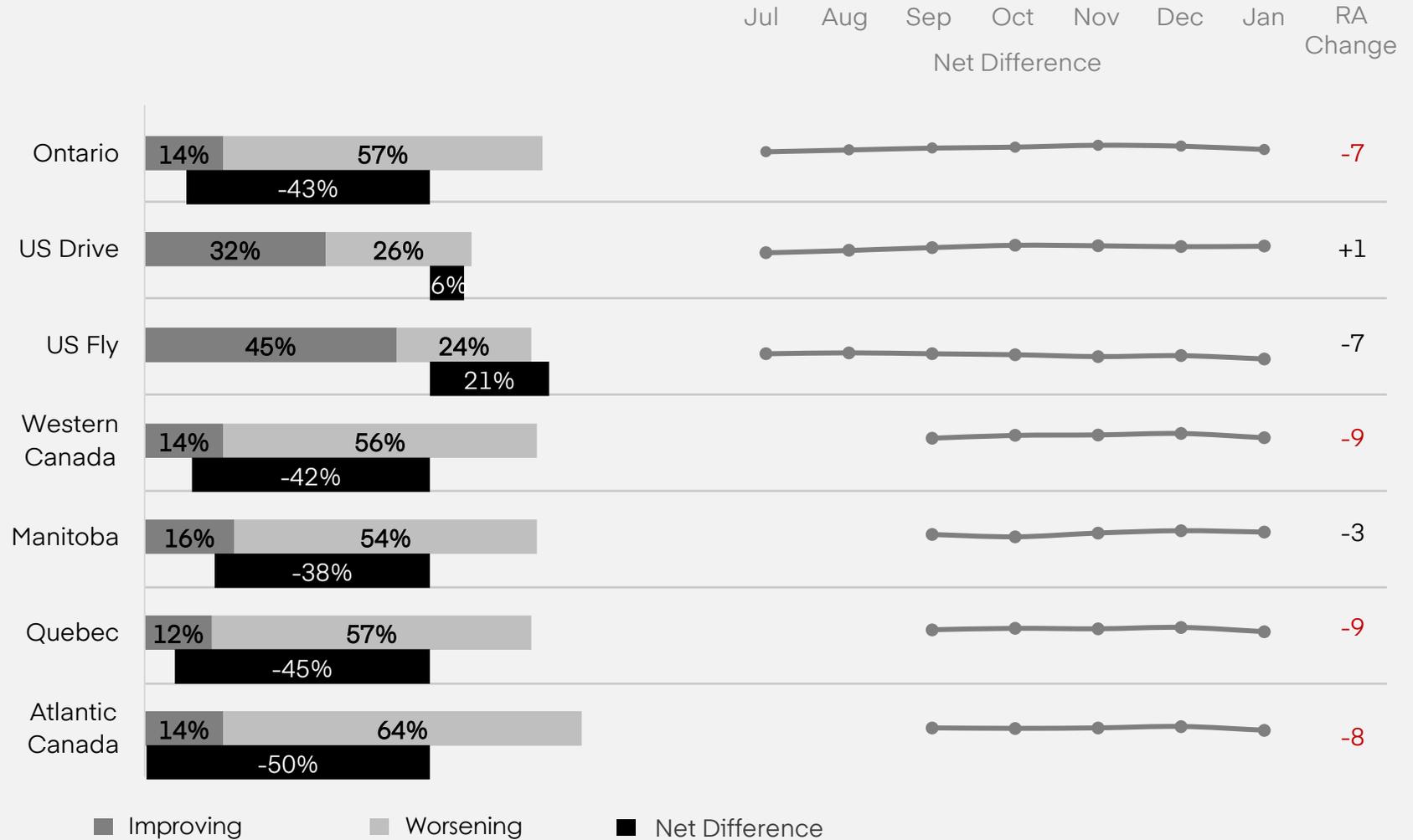
T4. How much do you agree or disagree with the following statements? [I am more likely to travel in Ontario in the next 12 months because of the unfavourable international exchange rates.] (Excludes "don't know") (5-point scale)
All respondents from Canada. (n=4,410)

RELATIONSHIP EXPECTATION BETWEEN THE U.S. AND CANADA

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

Optimism has declined across most regions, except U.S. Drive. As the most notable decline are seen in Western Canada, Quebec, and Atlantic Canada.

*Trend lines represents the difference between improving and worsening.

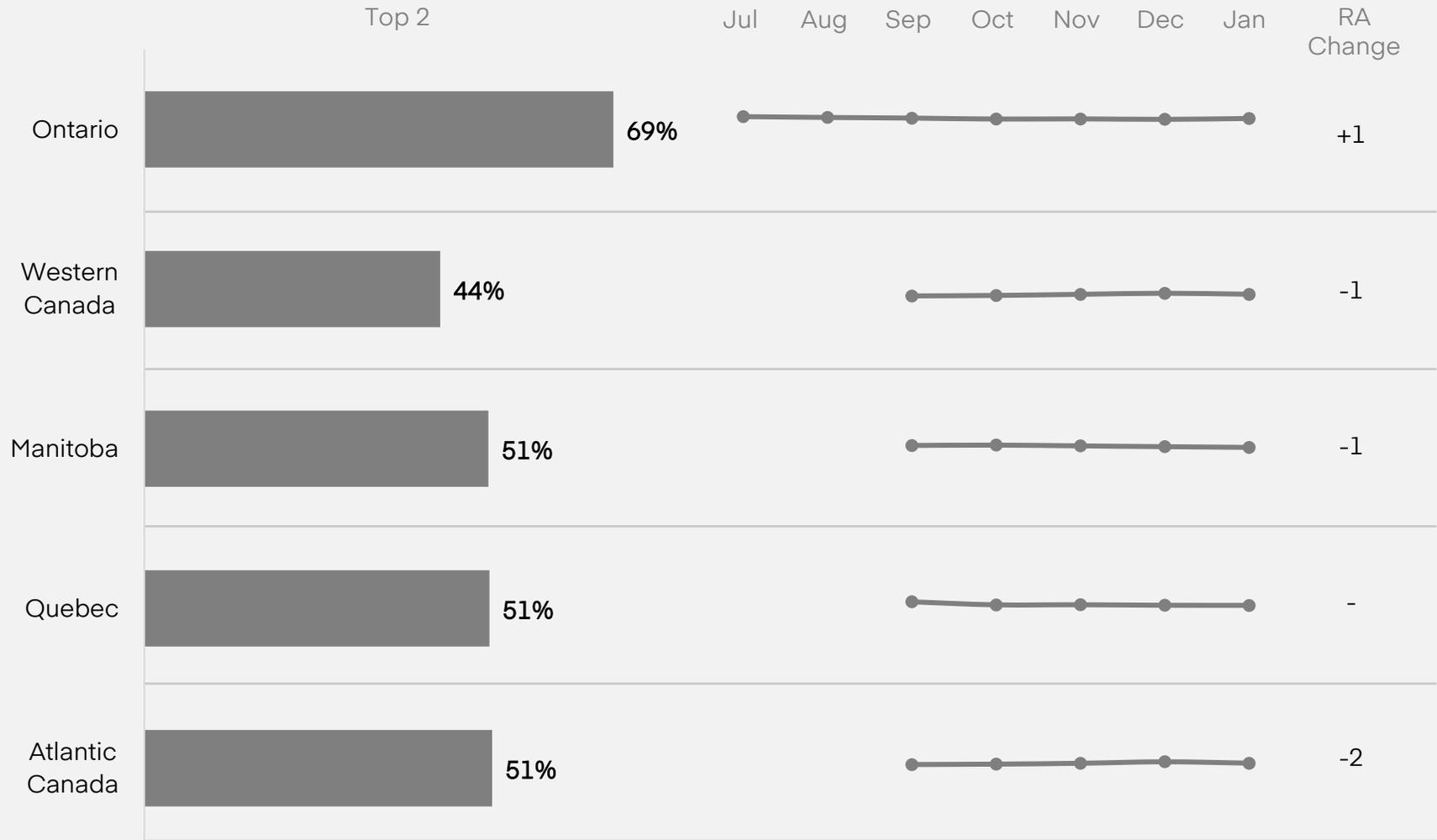


P2. Over the next 12 months, how do you think the relationship between the U.S. and Canada will change? (Excludes "don't know") (5-point scale)
All respondents. (n=5,610)

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

Ontario travellers remain the most likely to choose travel within the province due to the current U.S. political climate.

All Canadian regions are holding steady compared to the previous month.



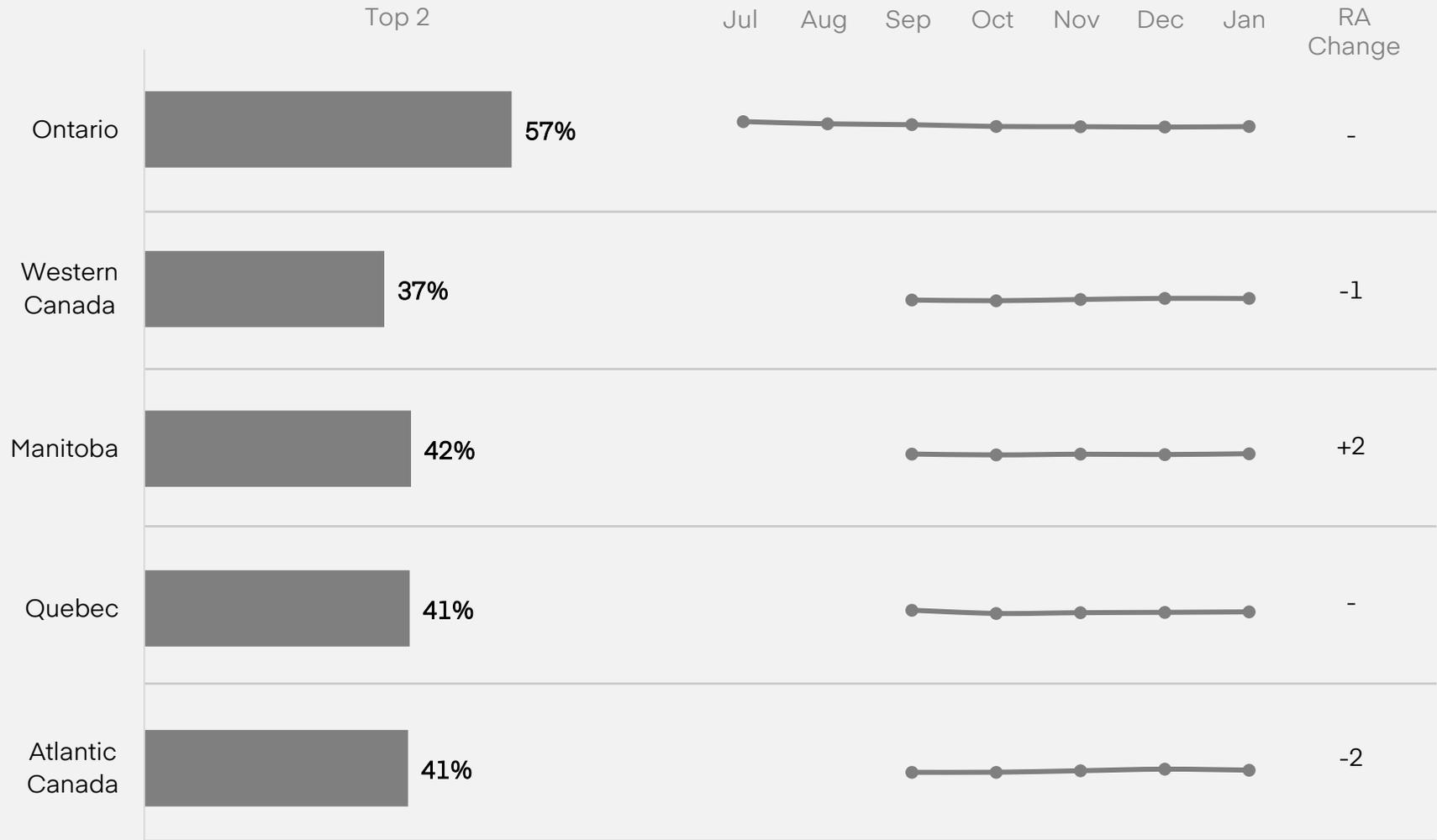
P3. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
 [I am more likely to travel within Ontario in the next 12 months because of the current political climate in the United States.]

All respondents from Canada. (n=4,398)

ONTARIO TRAVEL LIKELIHOOD: IMPACT OF GLOBAL INSTABILITY

Ontario travellers remain the most likely to travel within the province due to global instability and conflict, with three in five reporting this behaviour, compared to around two in five travellers in other Canadian markets.

Concerns about global instability and conflict remain stable compared to the previous month.



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

ENVIRONMENTAL CONSIDERATIONS IN TRAVEL

Concern about snow and wildfire impacts on travel to Ontario remains low overall and continues to decline across U.S. markets, particularly among U.S. Fly travellers, despite them remaining the most sensitive to these issues. In contrast, Manitoba travellers show rising concern about wildfires. Interest in sustainable tourism remains stable, with U.S. Fly travellers the most motivated overall, while willingness to pay more for sustainable options is increasing in Manitoba and Atlantic Canada but softening among U.S. Fly travellers.

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Weather Conditions

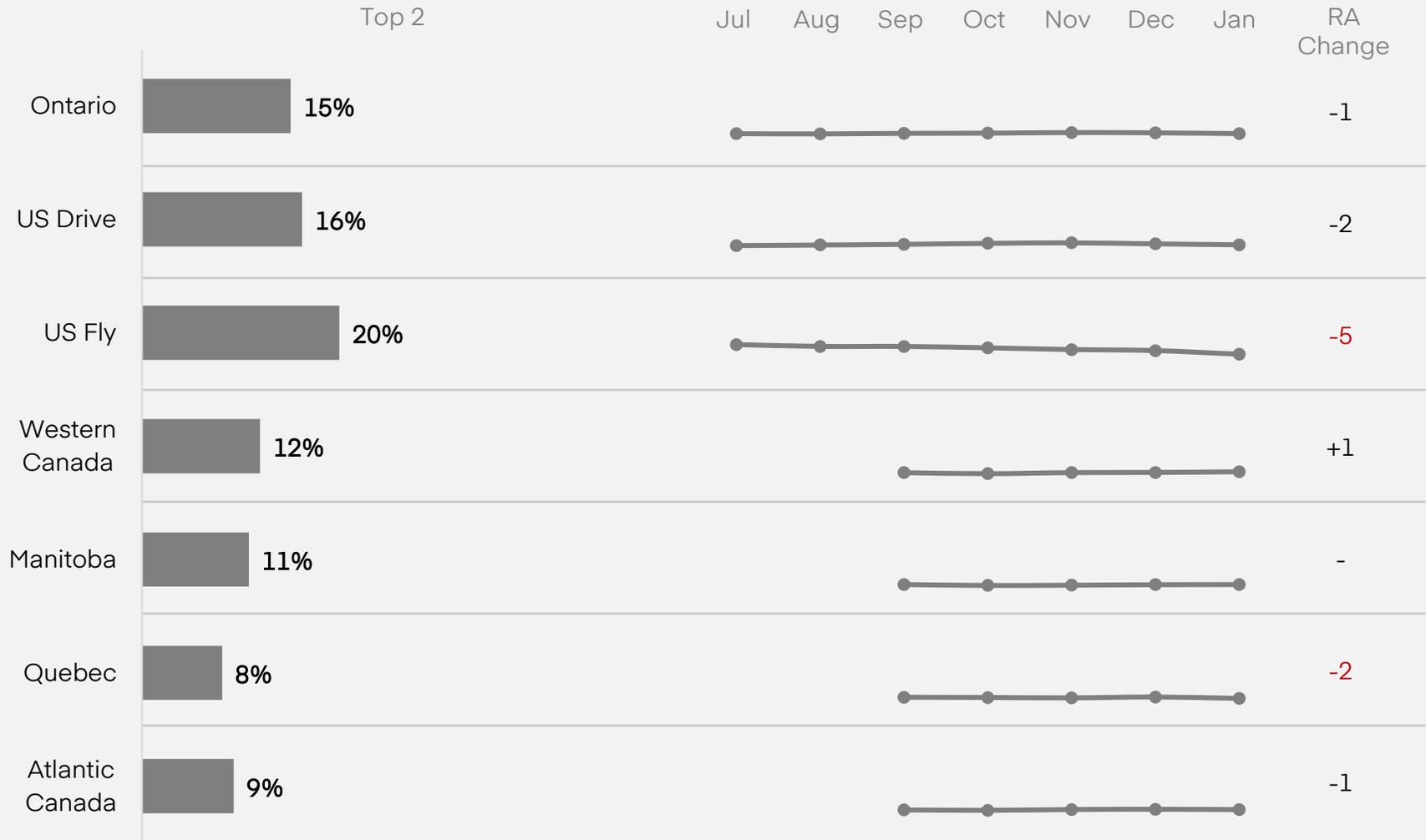
Sustainability

Impact on Travel Plans

LACK OF SNOW IMPACT ON ONTARIO TRAVEL

Travellers' overall concern about the lack of snow impacting plans to travel to Ontario remains low and stable.

While U.S. Fly travellers are still the most likely to agree, agreement has steadily declined since September 2025, including a significant drop from last month.



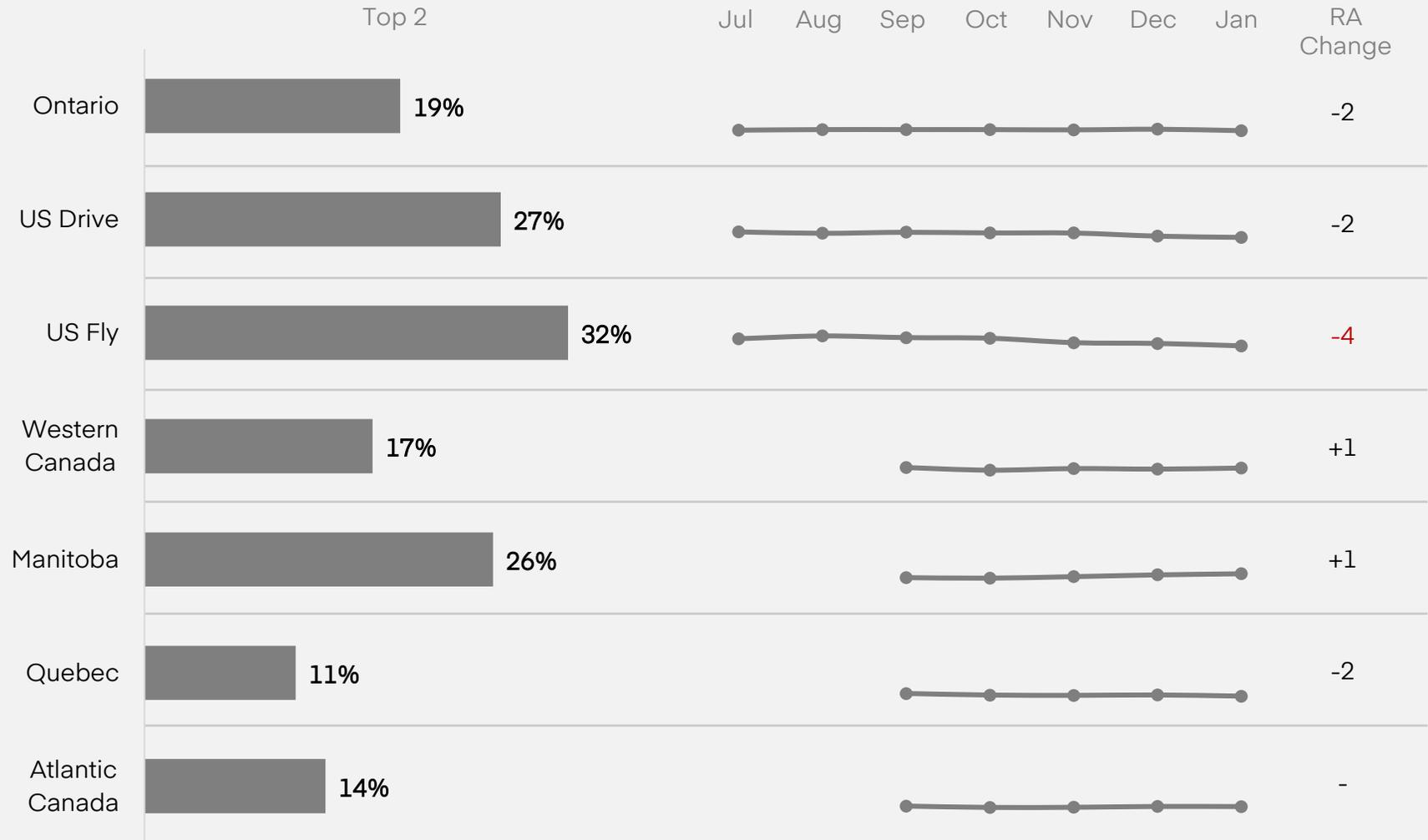
ST1. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
 [The lack of snow has impacted my travel plans in Ontario, Canada]
 All respondents. (n=5,894)

WILDFIRES IMPACT ON ONTARIO TRAVEL

U.S. Fly travellers are more likely than other regions to report that wildfires have impacted their plans to travel to Ontario.

Across U.S. markets, concern has steadily declined from earlier months, with U.S. Fly travellers showing a significant drop compared to last month.

In contrast, Manitoba travellers report increasing concern about wildfires since September 2025.



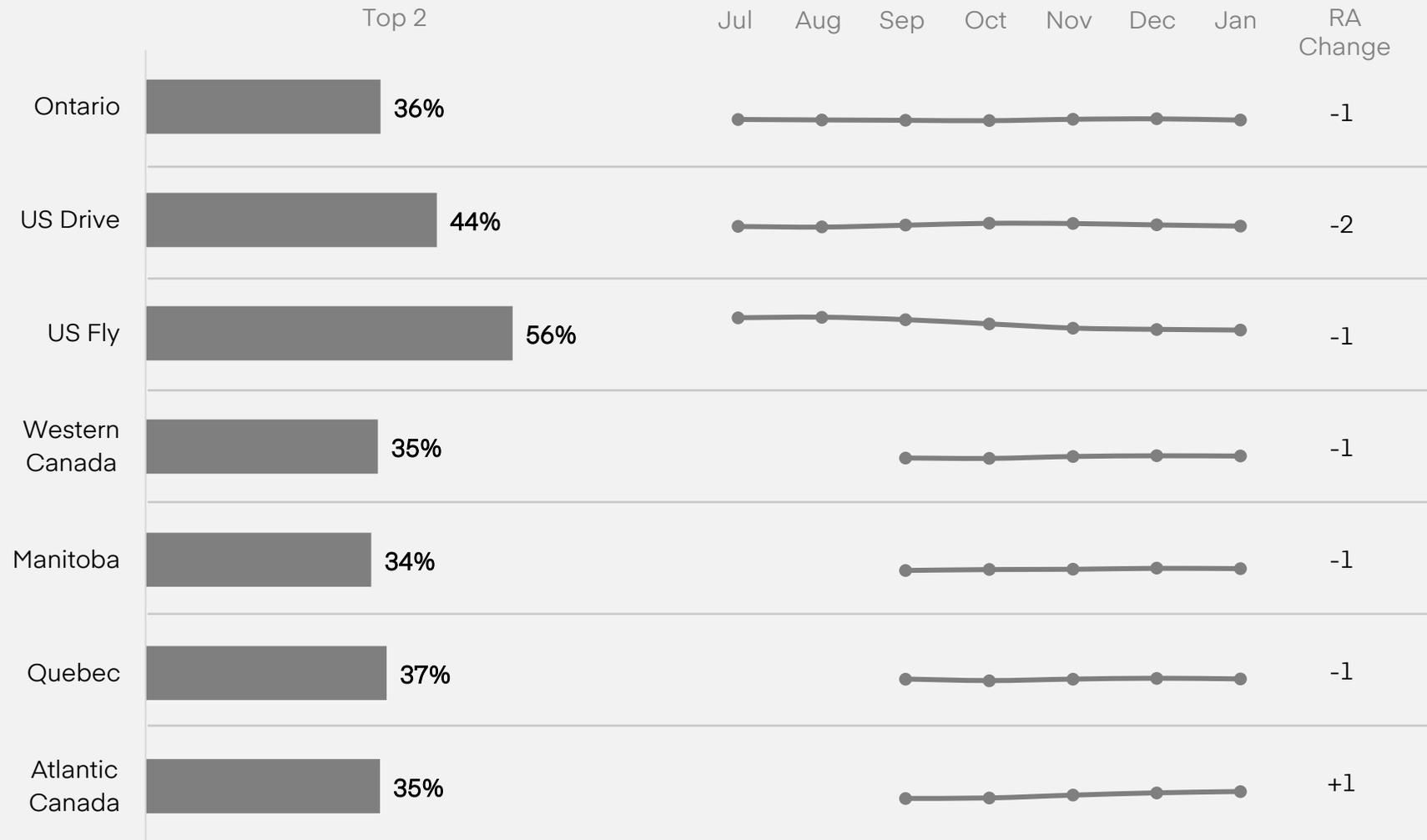
ST1. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
 [Canadian wildfires have impacted my travel plans in Ontario, Canada]
 All respondents. (n=5,894)

PRIORITIZING SUSTAINABLE TOURISM

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

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

Atlantic Canada travellers continue to show a steady upward trend since September 2025.



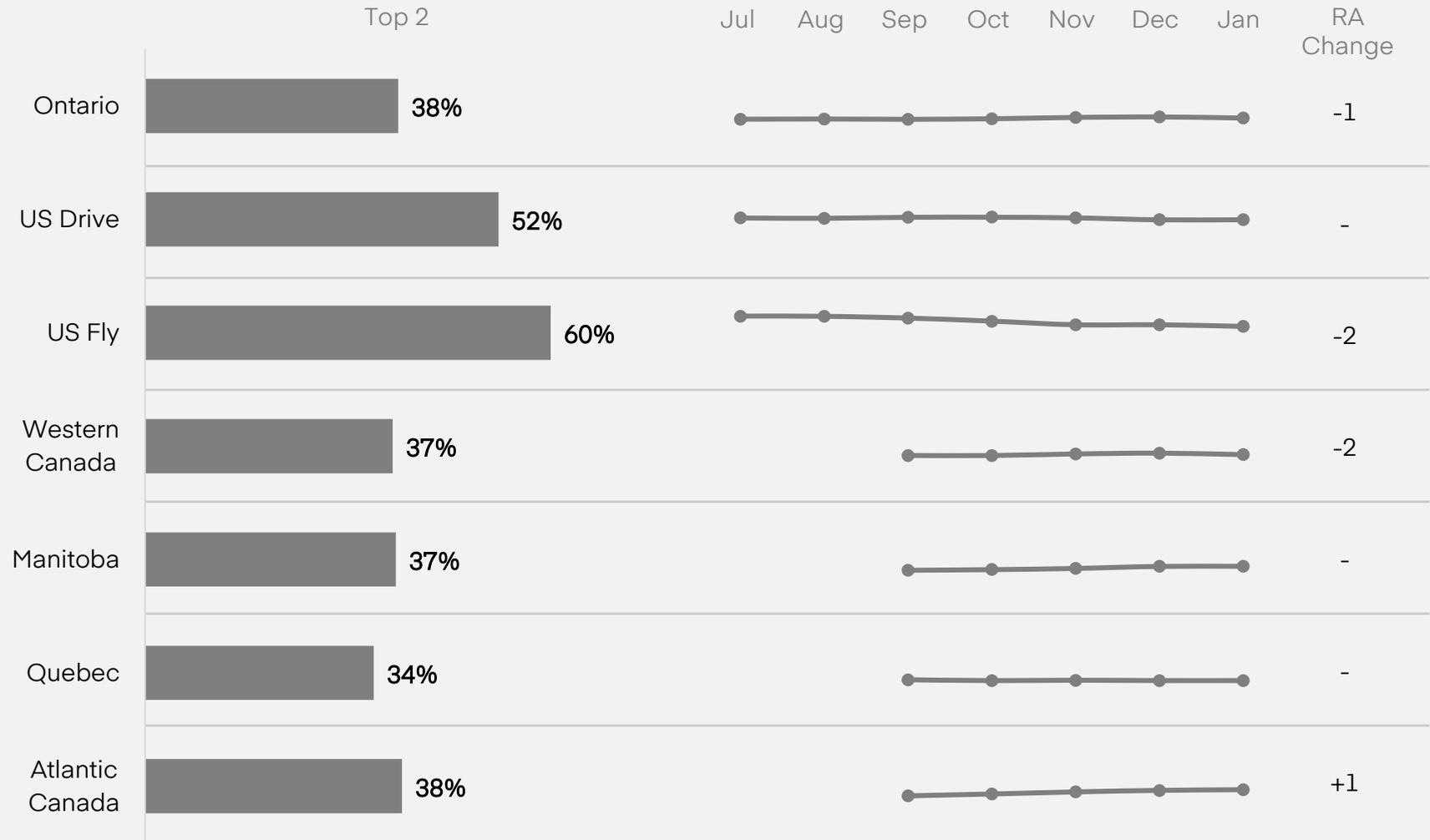
ST2. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
 [I choose travel destinations that prioritize sustainable tourism]
 All respondents. (n=5,812)

PAYING EXTRA FOR SUSTAINABLE TRAVEL

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

Manitoba and Atlantic Canada travellers are increasingly willing to pay more for sustainable travel options, showing an upward trend since September 2025.

In contrast, U.S. Fly travellers, while still more likely overall to pay more, have shown a downward trend over the same period.



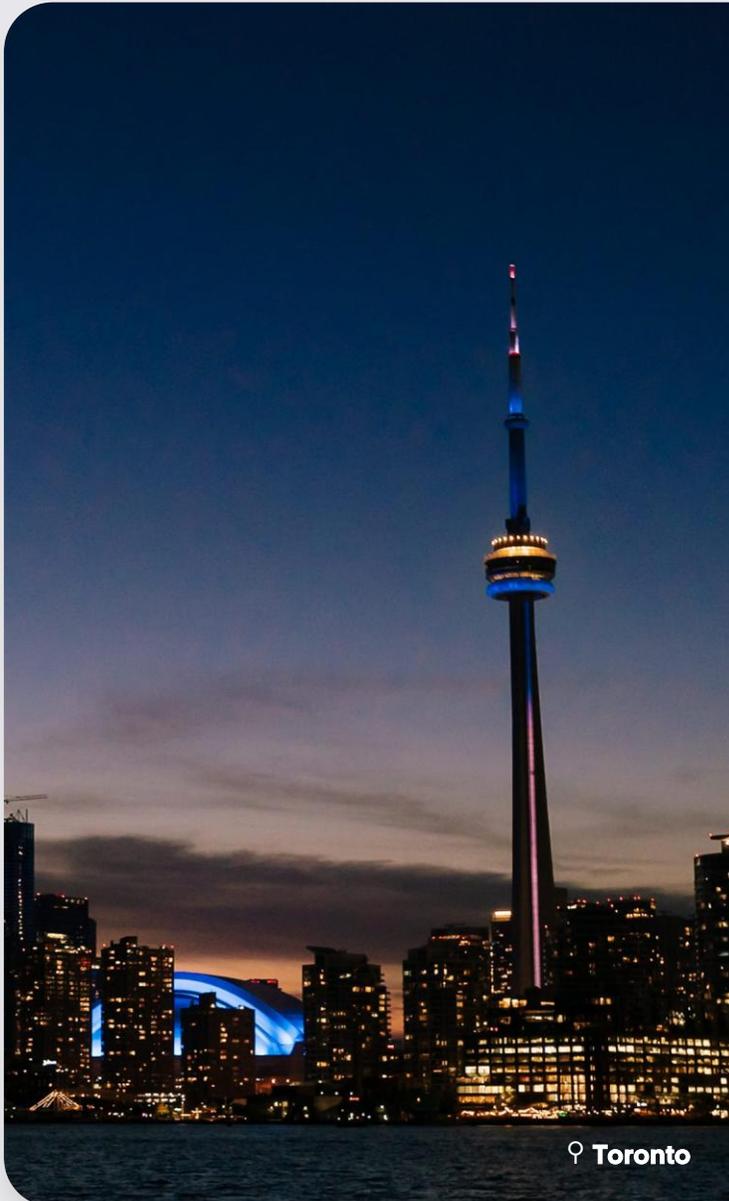
ST2. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
 [I am willing to pay more for a sustainable travel option, if the experience is equivalent]
 All respondents. (n=5,812)

FIFA WORLD CUP 2026

Awareness of Toronto as a FIFA 2026 host remains strong in Ontario but is declining across most other regions. While U.S. Fly travellers are the most likely to be motivated to visit Toronto because of FIFA, its appeal is weakening elsewhere, particularly in Western Canada and Quebec. Avoidance of Toronto due to FIFA 2026 is increasing across regions.

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FIFA 2026



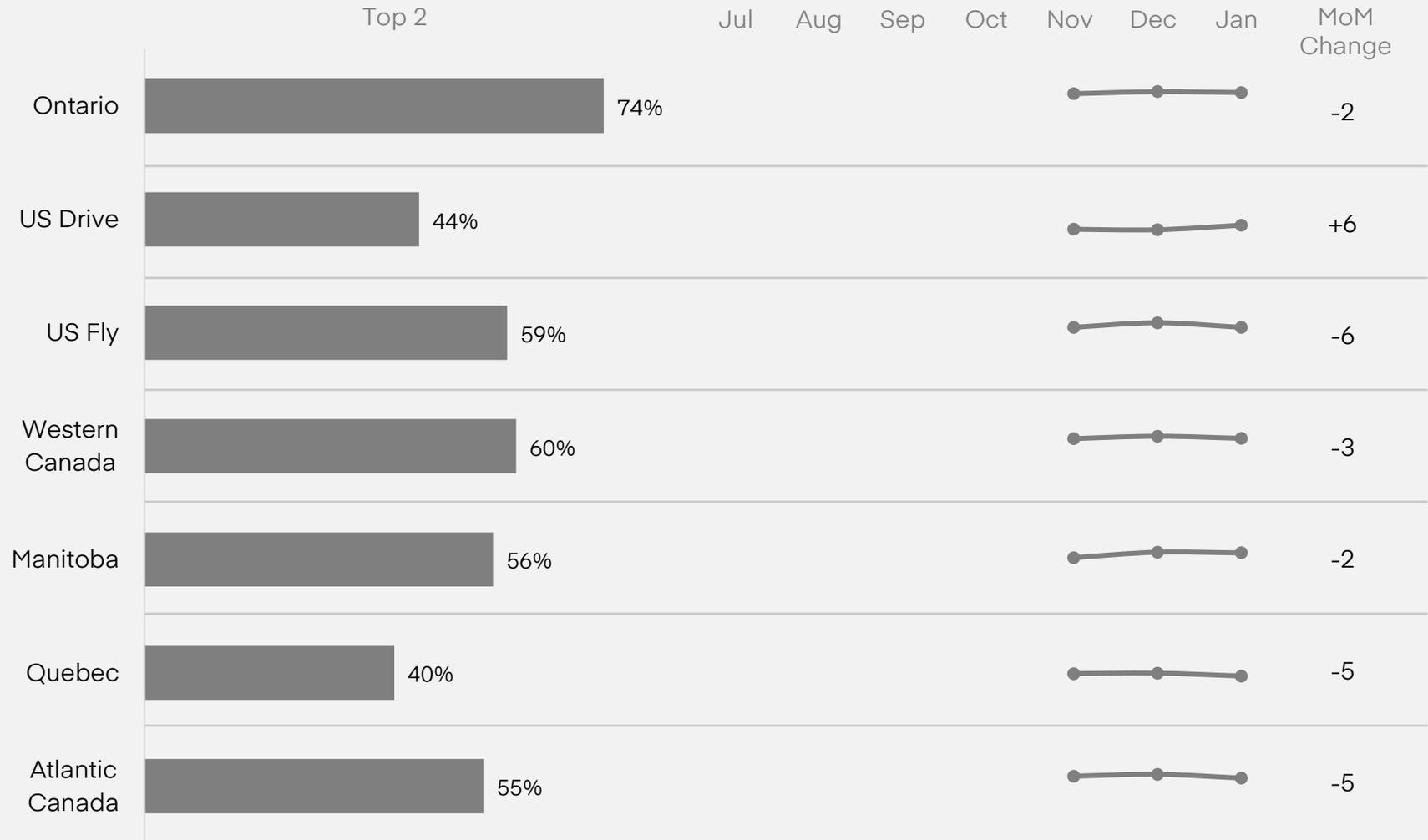
📍 Toronto

AWARENESS OF TORONTO AS HOST CITY

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

Awareness is more moderate across other regions, with all regions except U.S. Drive showing a decline from the previous month.'

Overall, Quebec and U.S. Drive report the lowest awareness levels.

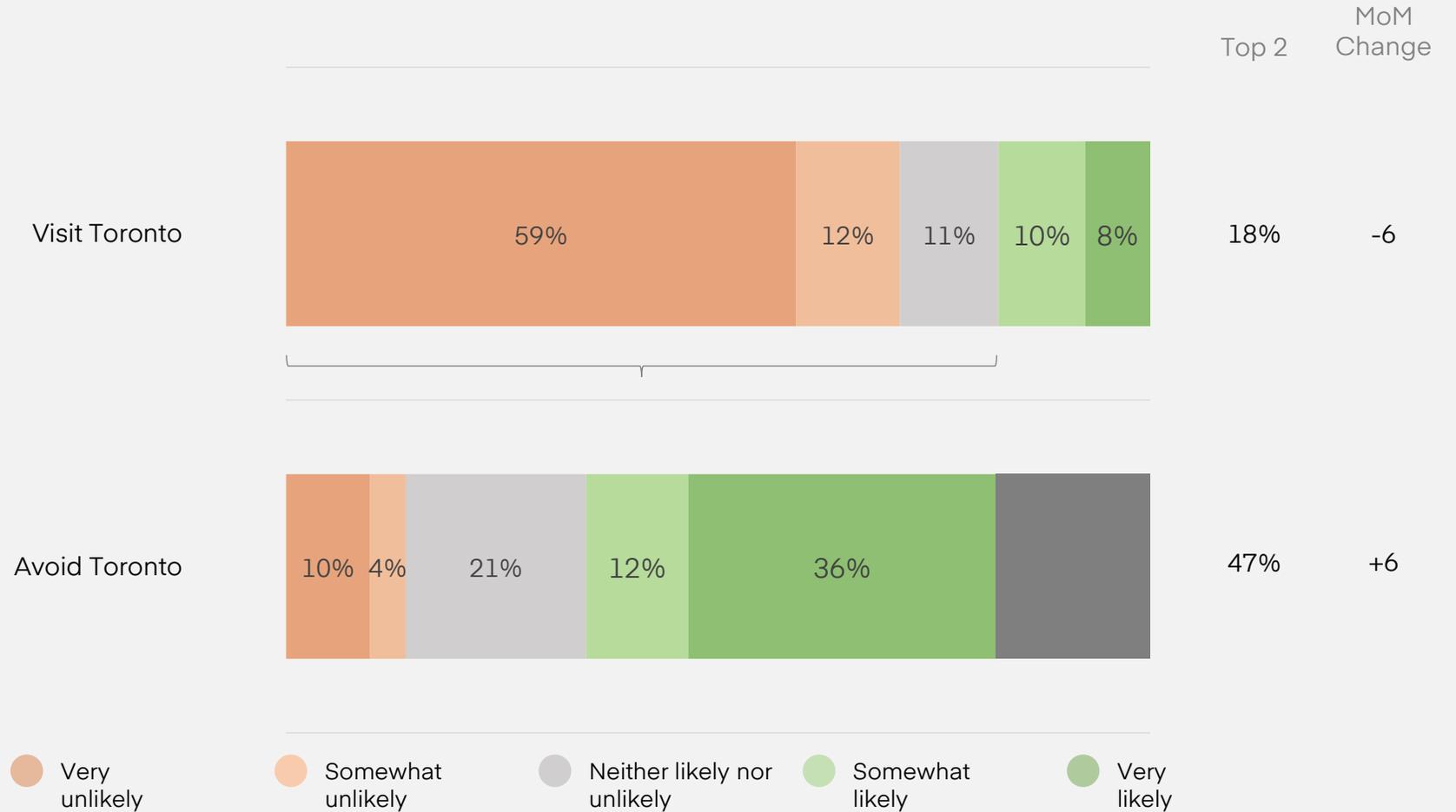


F11. Before today, how aware are you that Toronto is one of the official host cities for the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
All respondents. (n= 2,009)

VISITING TORONTO DUE TO FIFA WORLD CUP 2026

U.S. fly travellers are more likely to visit Toronto because it is hosting FIFA 2026, with two in five reporting this as a motivator.

Canadian markets are more likely to avoid Toronto because it is a host city for FIFA 2026.

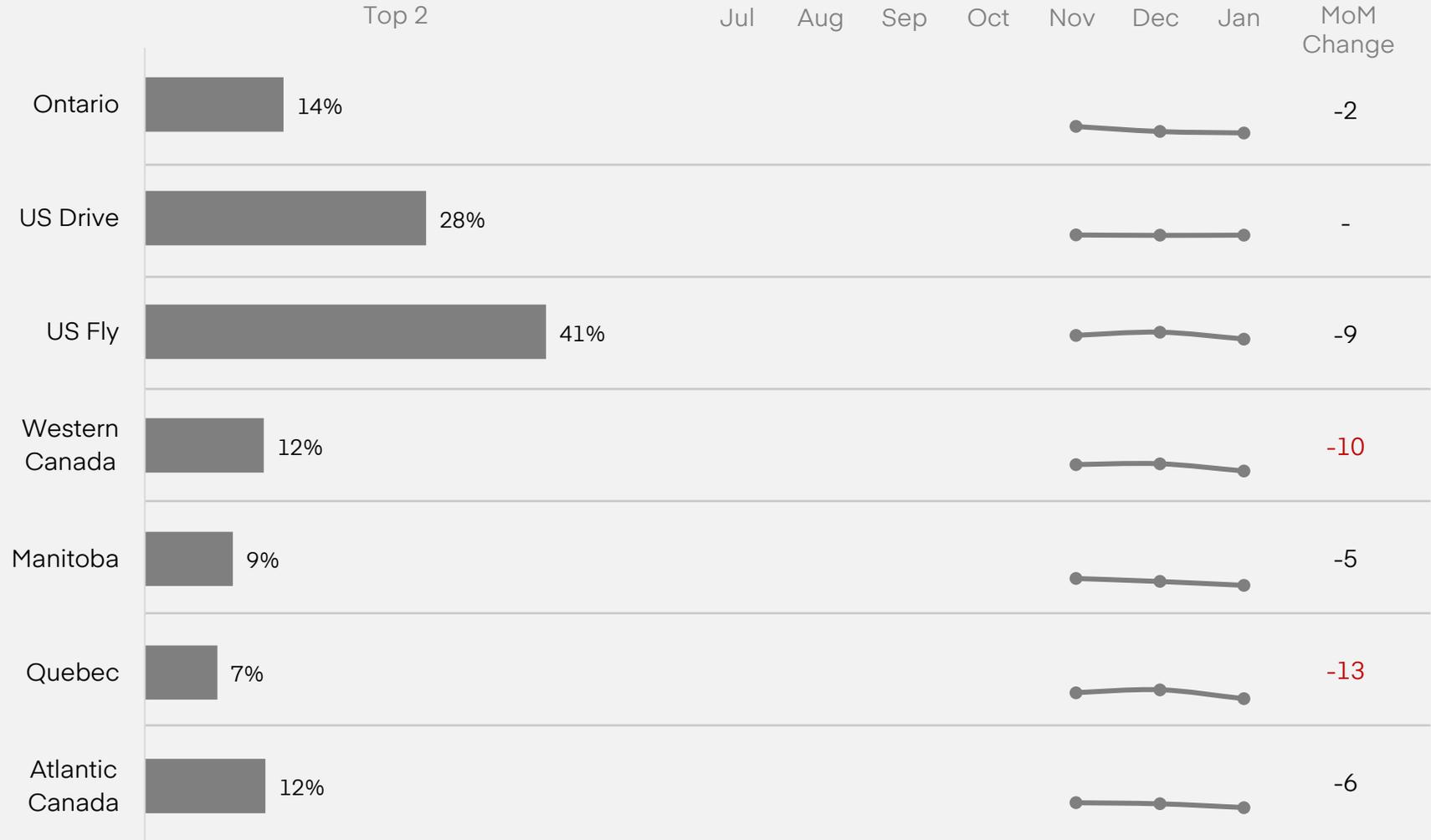


FI2. How likely are you to visit Toronto because it's hosting the FIFA World Cup 2026? (Excludes "don't know") (5-point scale) / FI3. How likely are you to avoid Toronto because it's hosting the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
 Respondent who don't live in the GTA (n=1,812)

VISITING TORONTO DUE TO FIFA WORLD CUP 2026

U.S. fly travellers are more likely to visit Toronto because it is hosting FIFA 2026, with two in five reporting this as a motivator.

Across other regions, FIFA 2026 is becoming less of a motivator for travel to Toronto, with all regions except U.S. Drive showing a decline from last month. Western Canada and Quebec share significant declines.



FI2. How likely are you to visit Toronto because it's hosting the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)

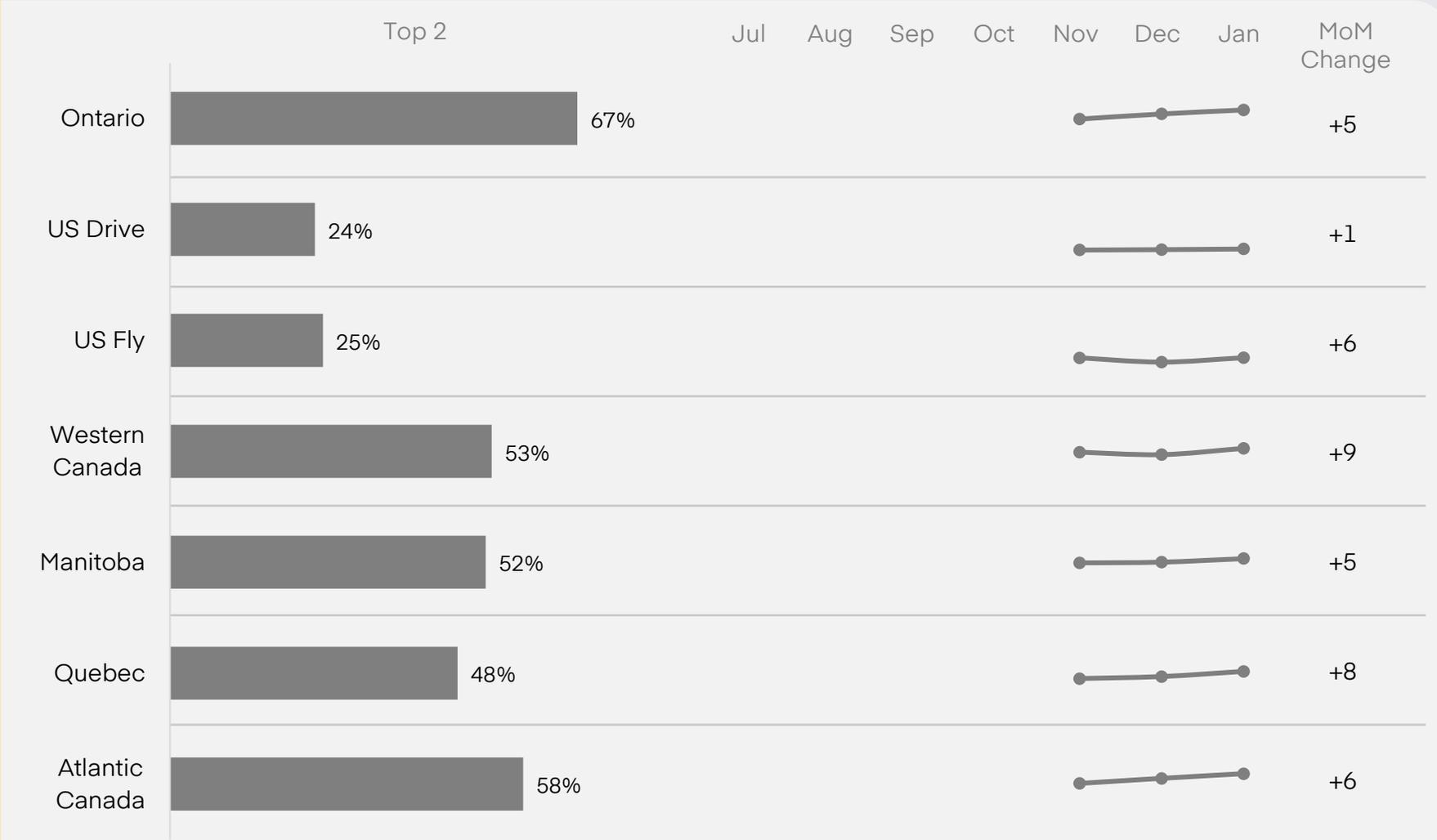
Respondent who don't live in the GTA (n=1,812)

AVOIDING TORONTO DUE TO FIFA WORLD CUP 2026

Canadian markets are more likely to avoid Toronto because it is a host city for FIFA 2026.

In contrast, one quarter of U.S. travellers say they would avoid Toronto for this reason.

Overall, avoidance of Toronto due to FIFA 2026 has increased across all regions, mainly seen among Western Canada and Quebec travellers.



FI3. How likely are you to avoid Toronto because it's hosting the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)

Respondent who don't live in the GTA (n=1,781)

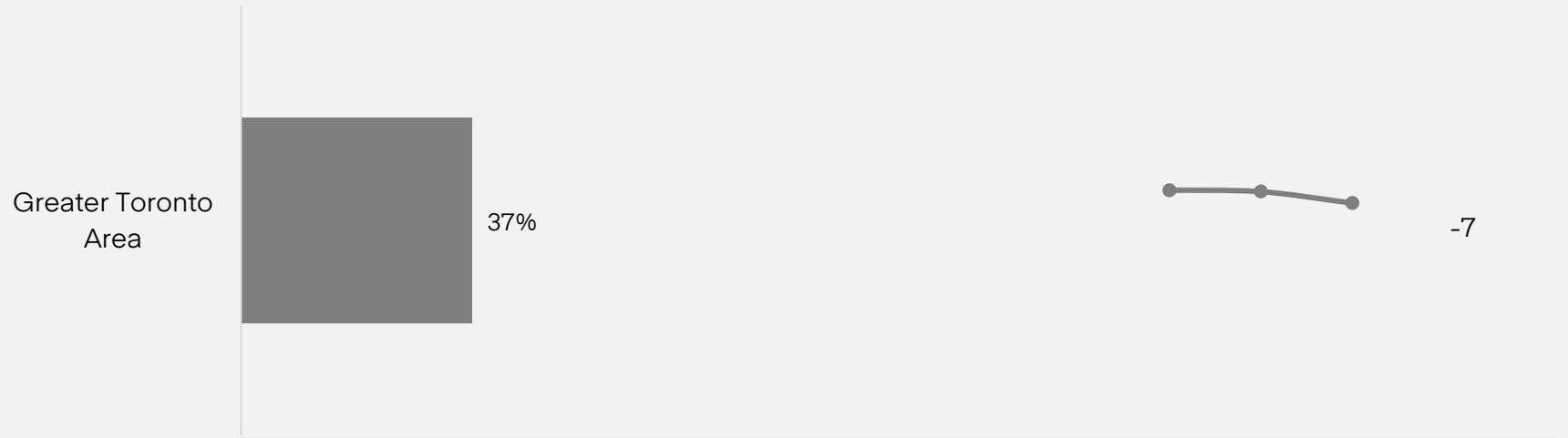
VISITING FIFA HOST AREAS WITHIN TORONTO

GTA residents report being less likely than last month to take part in Toronto's FIFA 2026 experience, whether by attending matches or related attractions.

Last month, close to half said they would participate, compared to closer to two-fifths this month.

Top 2

Jul Aug Sep Oct Nov Dec Jan MoM Change



FI2B. How likely are you to visit Toronto's FIFA host areas, fan zones, or attractions or attend any World Cup matches during the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
Respondent who live in the GTA (n=212)