



## **2SLGBTQI+ RESEARCH – DOMESTIC, U.S., AND INTERNATIONAL MARKETS – PARTNER REPORT**

Prepared for: Destination Northern Ontario  
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**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](http://www.crg.ca)

**CONTEXT IS EVERYTHING**

A decorative header image showing a string of white and blue striped bunting flags hanging against a dark background with warm, glowing string lights.

## METHODOLOGY

### Methodology:

- CAWI (Computer-Assisted Web Interview)

### Overall 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 27<sup>th</sup> – April 18<sup>th</sup>, 2026

### Median Length of Interview:

- 15.8 minutes

### Partner Report Considerations:

The results in this partner report are filtered to those who are likely to visit Ontario and aware of Northern Ontario.

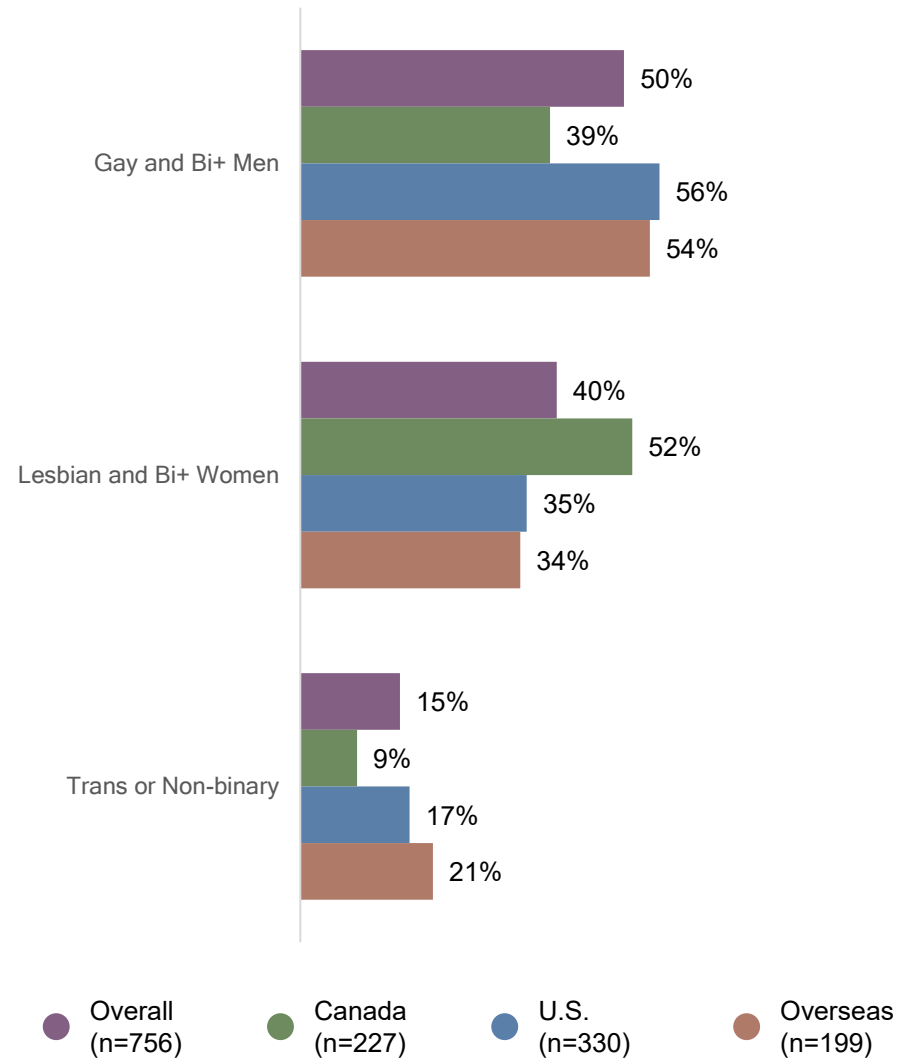
# TRAVELLER IDENTITY

**The identity composition of those aware of Northern Ontario varies meaningfully across geographies, with Canadian domestic respondents showing a distinctly different profile from either international market.**

Gay and bi+ men account for half overall but shift considerably by market — lowest among Canadian respondents and rising among both U.S. and overseas travellers, who sit at similar levels.

Lesbian and bi+ women show the inverse pattern, with Canada the only market where they account for the majority, while U.S. and overseas respondents sit below the overall figure.

Trans or non-binary respondents are lowest among Canadian respondents and rise progressively among U.S. and then overseas travellers.



SC4A Which of the following best describes your sexual orientation? (Multi-select)  
 SC4B Which of the following best describes your current gender identity? (Single-select)  
 SC4C Do you consider yourself to be transgender or trans? (Single-select)  
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Northern Ontario (n=756)

# ONTARIO TRIP PURPOSE

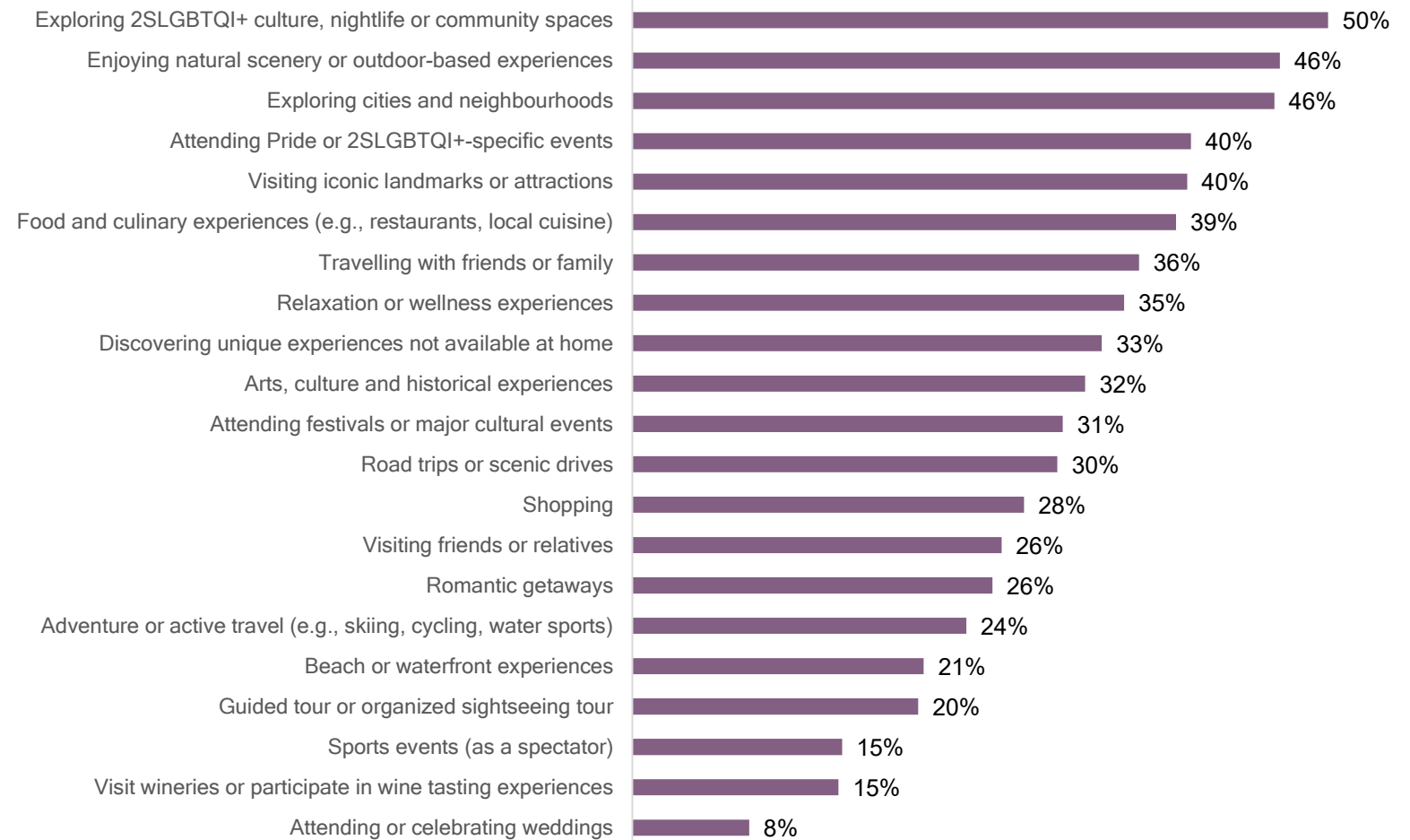
**2SLGBTQI+ culture, nightlife, and community spaces leads the list of Ontario trip motivations among those aware of Northern Ontario.**

Natural scenery and city exploration follow closely, with Pride and 2SLGBTQI+-specific events and iconic landmarks rounding out the upper range. The prominence of both community culture and Pride events near the top of the list reinforces that identity-specific motivations carry considerable weight for this audience alongside mainstream leisure drivers.

Travelling with friends or family and relaxation and wellness sit in the mid-range alongside discovering unique experiences and arts and culture, confirming that Ontario's appeal rests on a combination of experiential and community-driven motivations.

Sports events, wineries, and weddings rounded out the bottom of the list when it came to reasons for visiting.

## 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  
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Northern Ontario (n=756)

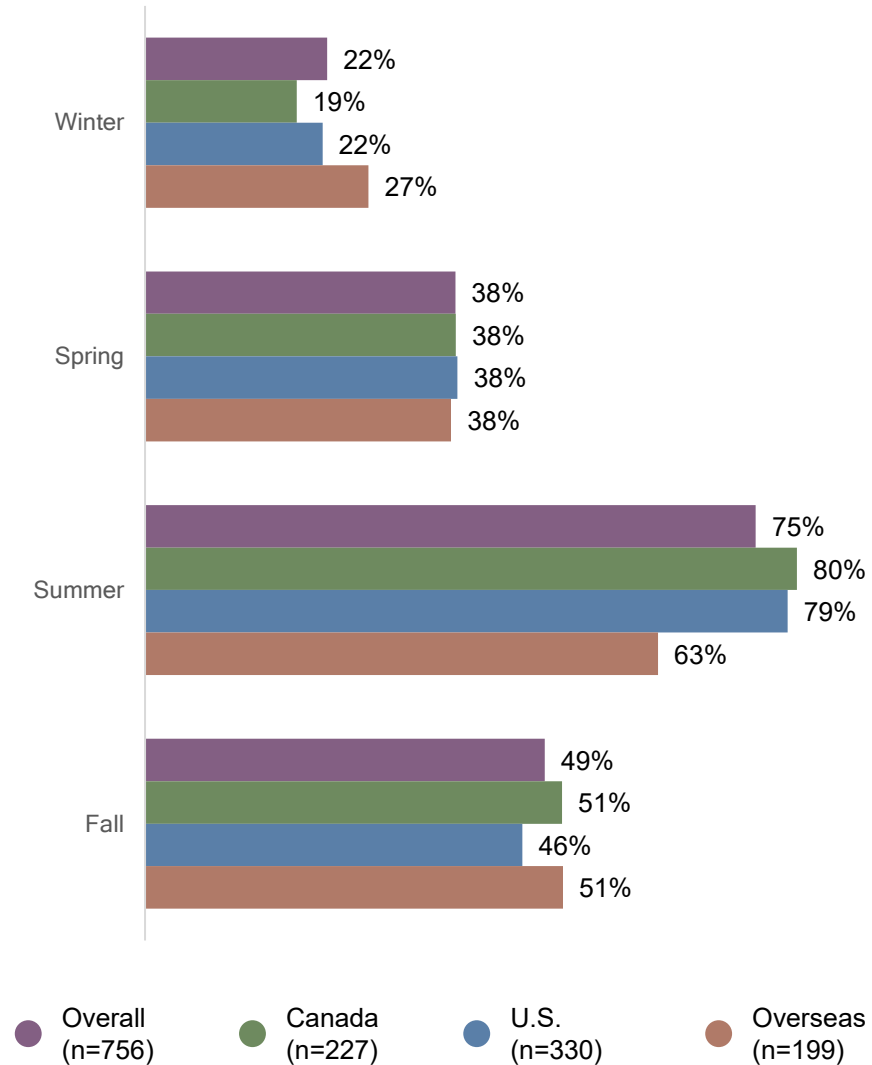
# ONTARIO TRIP: PREFERRED MONTHS OF TRAVEL

**Summer travel to Ontario dominates across domestic and international markets.**

2SLGBTQI+ travellers aware of Northern Ontario are actively considering trips to Ontario, with interest peaking in the summer across all markets. Canadian and U.S. respondents show nearly identical and strong summer consideration, while overseas travellers trail both markets more noticeably.

A distinctive pattern emerges in spring, where all three markets sit at an identical level — a rare consistency across geographies.

The consideration for fall is a secondary window, with Canadian and overseas respondents leading ahead of U.S. travellers. Overseas respondents show the strongest winter consideration, pointing to a modest off-peak opportunity for this market.



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 and aware of Northern Ontario

# ONTARIO TRIP: ACCOMMODATION PREFERENCES

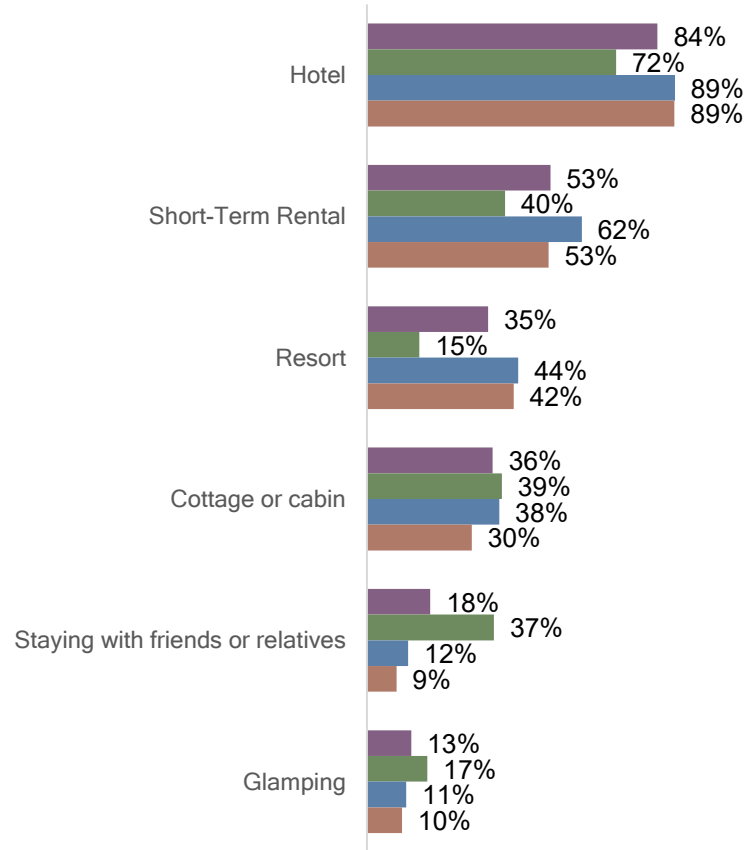
**Hotels are the dominant accommodation choice across all markets, but meaningful differences emerge in tier preferences and alternative formats.**

Short-term rentals are a strong secondary option, particularly for U.S. travellers, and both international markets show notably stronger resort interest than Canada.

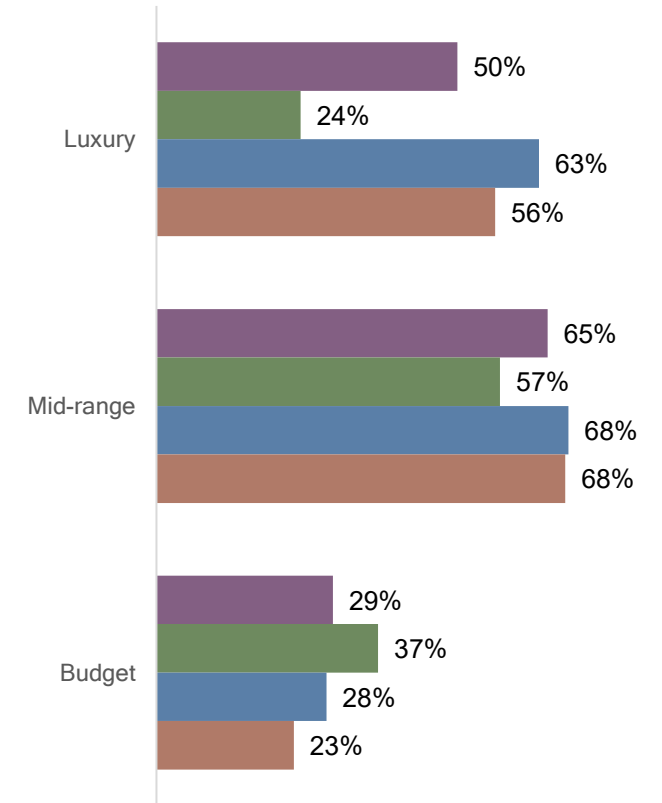
Within tier preferences, U.S. travellers show the strongest luxury orientation while U.S. and overseas respondents lead equally on mid-range. Canadian domestic respondents index highest on budget and are significantly more likely than either international market to stay with friends or relatives.

Cottages and cabins attract steady interest across all markets, with Canadian respondents showing the strongest inclination.

### Accommodation Type



### Luxury Preferences



● Overall (n=756)
 ● Canada (n=227)
 ● U.S. (n=330)
 ● Overseas (n=199)

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 and aware of Northern Ontario

# WHAT INCLUSION SIGNALS MATTER MOST

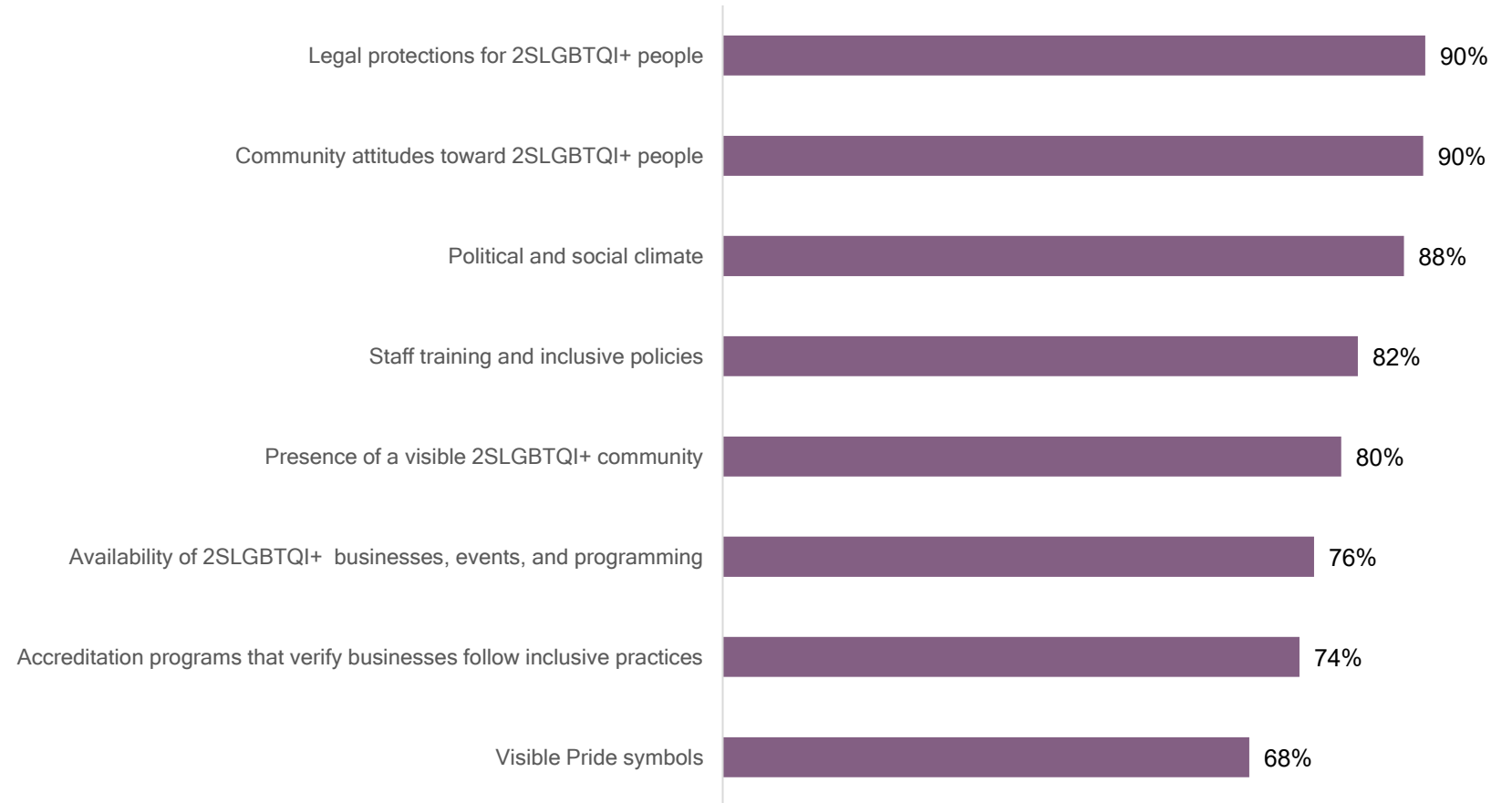
**When choosing a destination, 2SLGBTQI+ travellers aware of Northern Ontario apply a clear two-tier hierarchy of inclusion signals.**

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 — with legal protections and community attitudes ranking in a near-tie at the top.

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 seventh overall, accreditation emerges as one of the strongest drivers of consideration.

## What Inclusion Signals Matter Most



S2 How important are the following when choosing a leisure travel destination?  
Respondents aware of Northern Ontario (n=756)

**CONTEXT IS EVERYTHING**

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