



DESTINATION ONTARIO

In partnership with Destination Ontario

DOinsights.crg.ca

ONTARIO TRAVEL & TOURISM MONTHLY

April 2026

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ONTARIO TRAVEL & TOURISM MONTHLY (OTTM)

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

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

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

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

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

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

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

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=1,987)
- Ontario (n=496)
- U.S. Drive (n=248)
- U.S. Fly (n=248)
- Western Canada (n=248)
- Manitoba (n=249)
- Quebec (n=248)
- Atlantic Canada (n=252)

Fieldwork Date:

- April 14th – 28th, 2026

Median Length of Interview:

- 12.0 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

Travel intent toward Ontario has increased across most markets this month, with significant gains in Western Canada, Quebec, and U.S. Fly. Ontario residents remain the strongest market, with intent holding stable at a high level. **Summer continues to dominate planned travel**, with peak intent concentrated in July and August.

Ontario's ratings as a pleasure travel destination have remained stable across markets, with Manitoba recording a significant increase and reaching its highest point to date. NPS scores also moved upward in several markets, most notably in Manitoba and Quebec, driven by gains in the share of promoters.

AI tool usage for travel information search has increased, while awareness of AI-generated search summaries remained relatively stable. ChatGPT remains the leading tool used for trip planning, primarily for researching attractions, finding destination ideas, and getting travel advice.

Cost remains the leading barrier to travelling to Ontario, cited by half of travellers for the tenth consecutive month. High transportation costs continue to be the second ranked barrier, particularly among Canadian markets. Transportation costs tend to rank lower in priority among U.S. travellers. Financial pressures on travel plans and perceptions of travel as a worthwhile investment remain relatively stable overall.

Expectations for the U.S.–Canada relationship has improved from last wave, though Canadian travellers remain considerably more pessimistic than their U.S. counterparts. Canada continues to rank as the most welcoming country among U.S. travellers.

FIFA 2026 awareness that Toronto is a host city has remained stable. Motivation to visit Toronto due to FIFA remains strongest among U.S. Fly travellers, while avoidance tends to be higher among Canadian markets.

KPI – 3 MONTH ROLLING AVERAGE

ONTARIO

U.S. DRIVE

U.S. FLY

Travel Intent In The Next 12 Months

85%

-

55%

+1%

69%

+5%

Travel Info Search

55%

+1%

58%

+1%

77%

+2%

Travel Worthwhile Investment

69%

+1%

69%

-

82%

+1%

KPI – 3 MONTH ROLLING AVERAGE

WESTERN CA	MANITOBA	QUEBEC	ATLANTIC CA
Travel Intent In The Next 12 Months			
51%	60%	54%	61%
+6%	+1%	+5%	+2%
Travel Info Search			
59%	49%	52%	55%
-4%	-4%	-1%	+1%
Travel Worthwhile Investment			
64%	66%	50%	65%
-	-	+2%	-



📍 Tobermory

TRAVEL DESTINATION PLANS

Interest in travelling to Ontario remains strongest among Ontario residents, with U.S. Fly, Western Canada, and Quebec all showing significant increases this month. Toronto and the Niagara Region remain the key destinations under consideration, followed by Ottawa.

Summer dominates planned travel, with intent peaking in August and remaining strong through July, while interest in early fall travel continues to gain momentum. Across markets, the mid-term window shows the greatest momentum, while long-term plans continue to ease sharply.

Tags - Explore more on DOinsights.crg.ca

Travel Intent

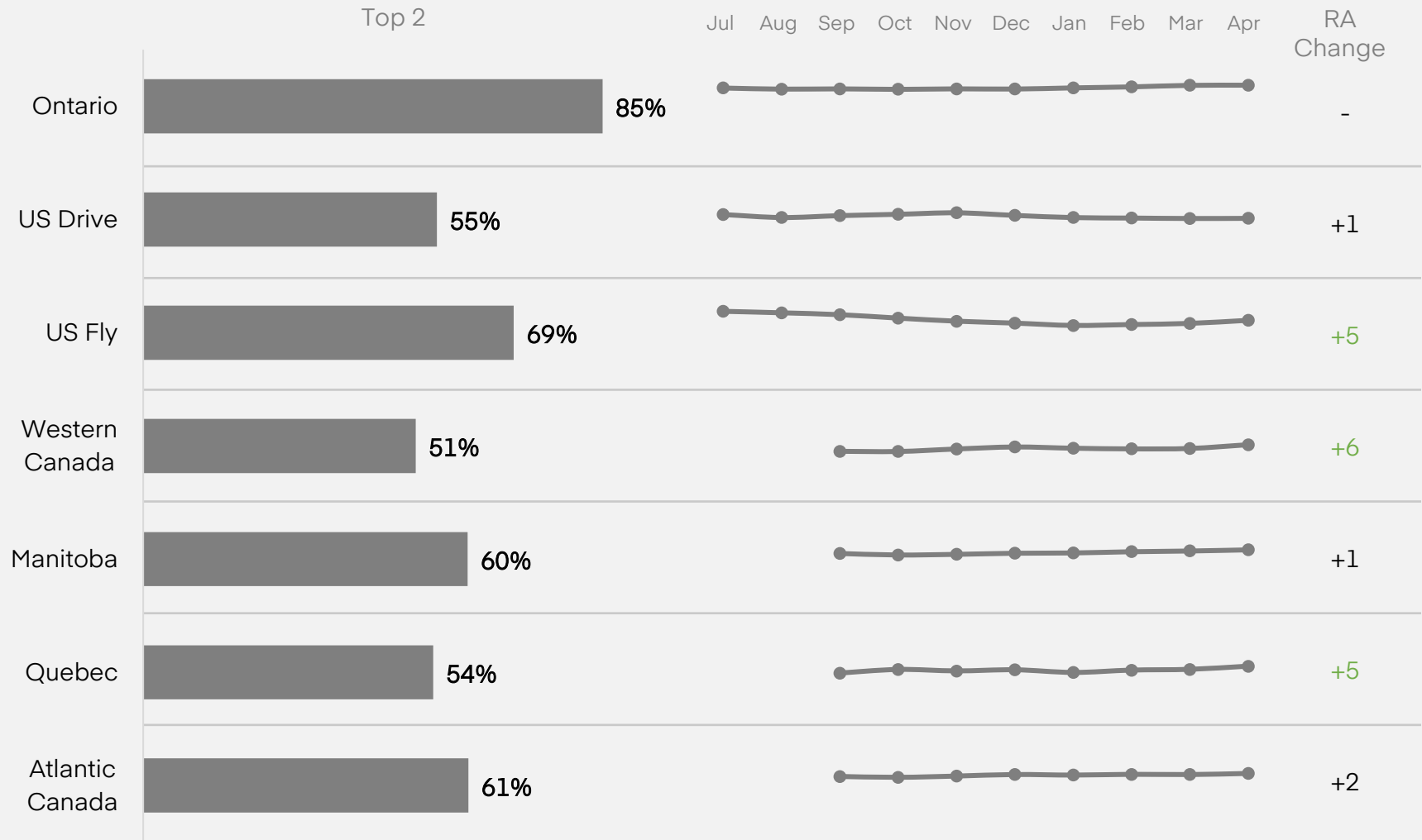
Number of Trips

Month of Travel

LIKELIHOOD OF TRAVELLING TO ONTARIO

Interest in travelling to Ontario remains strongest among Ontario residents and is stabilizing after an upward trend since December 2025.

U.S. Fly, Manitoba, and Atlantic Canada continue to follow as the next most engaged markets. Both U.S. markets are showing an upward trend.

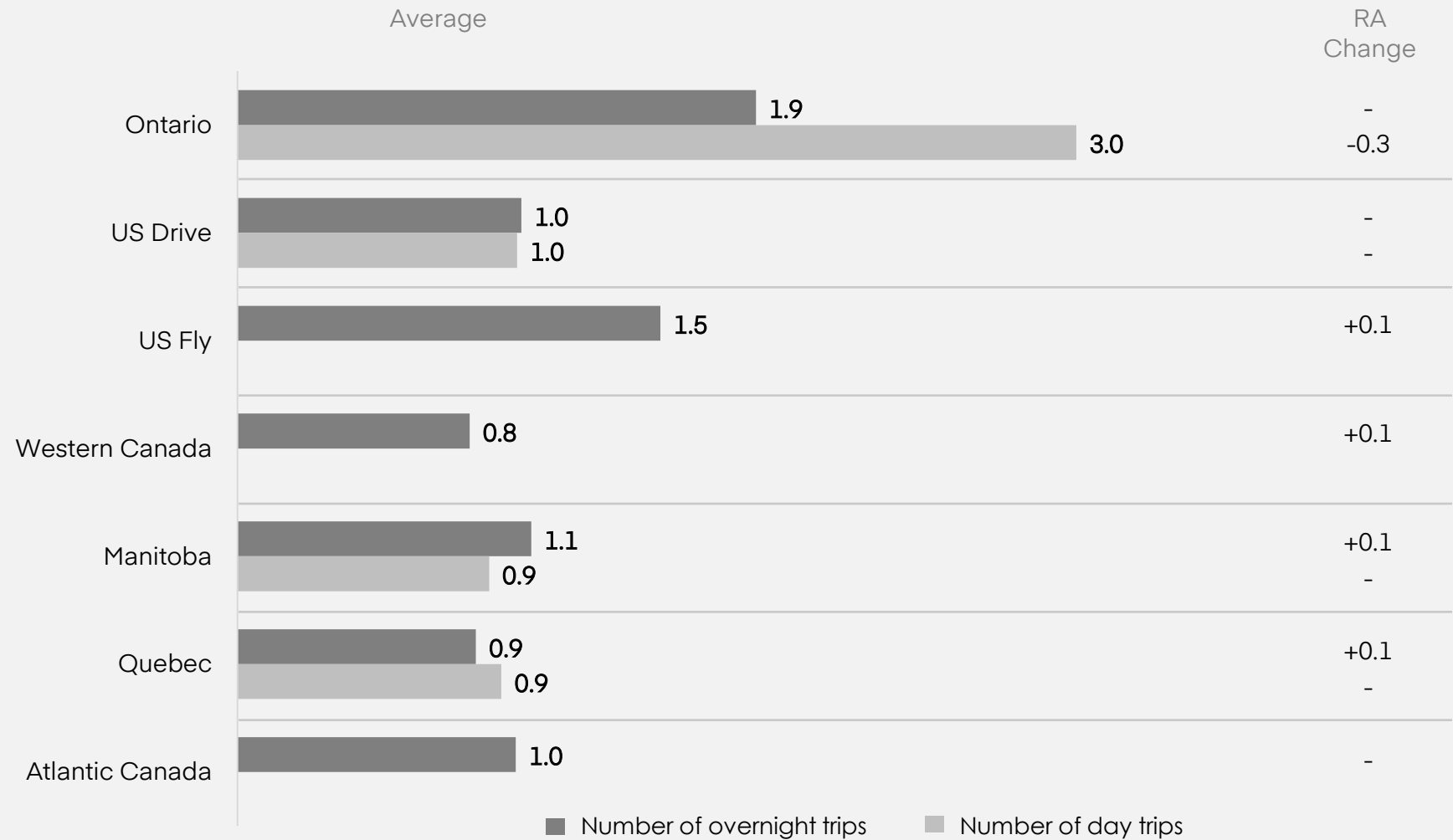


S5. In the next 12 months, how likely are you to take a pleasure trip of one or more nights in Ontario, Canada? (Excludes "don't know") (5-point scale)
 All respondents (n= 5,941)

TRAVEL PLANS IN ONTARIO – NEXT 12 MONTHS

Ontario residents continue to drive the majority of travel activity within the province, leading on both overnight and day trips, although day trips have eased slightly compared to last month.

U.S. Fly travellers rank second to Ontario residents in the number of overnight trips to the province, followed by Manitoba and Atlantic Canada. Regional variations otherwise remain relatively stable.



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=6,036) / Respondents from Ontario, U.S. Drive, Manitoba, & Quebec. S9 (n=3,765)

PLANNED MONTHS OF TRAVEL

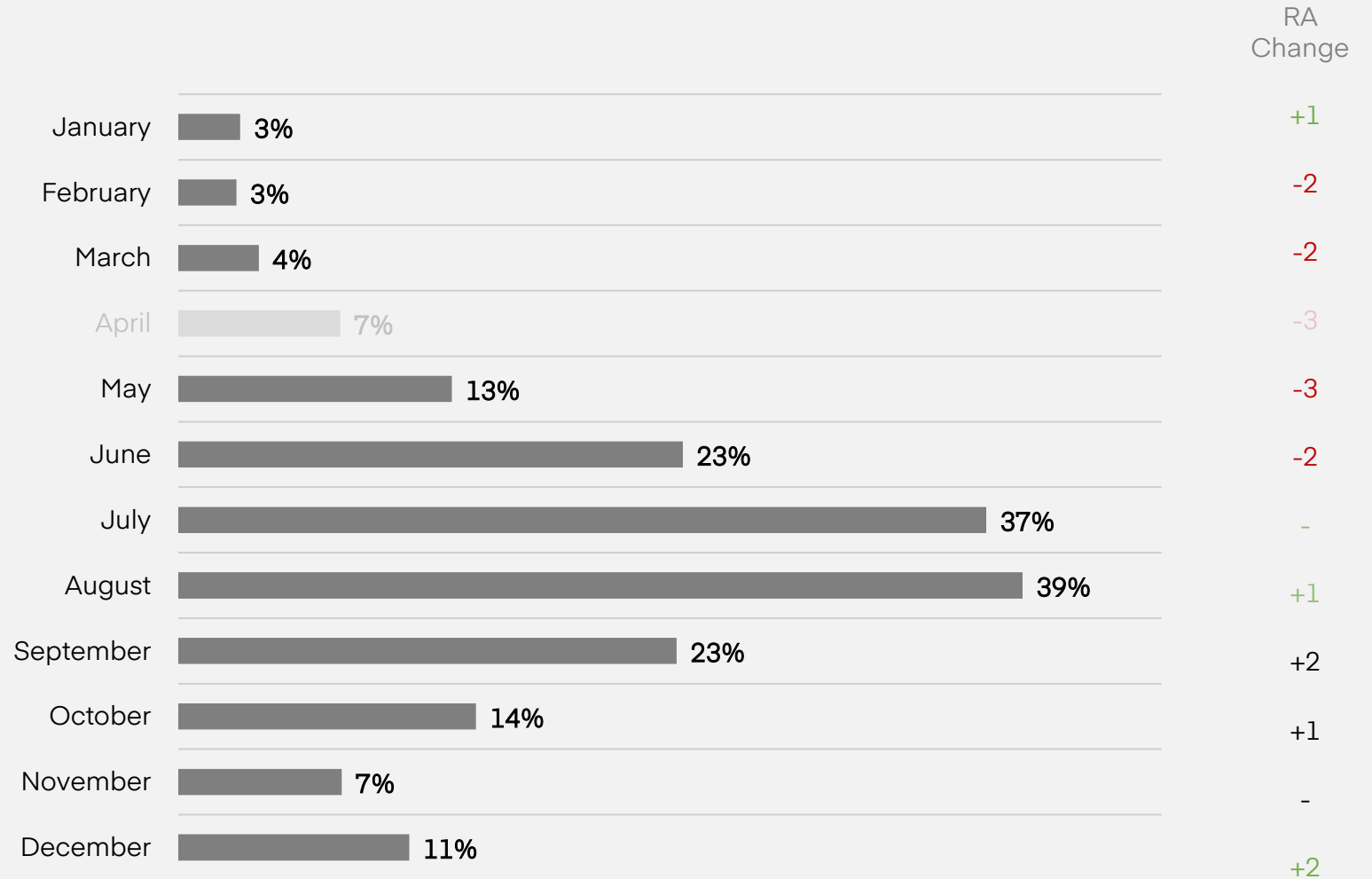
Summer remains the strongest period for travel to Ontario, with intent peaking in August and remaining high in July.

This pattern shows that interest accelerates at the start of summer and continues building until late summer.

Interest in early fall travel is still prevalent, especially in September, while spring months show notable declines as the season winds down.

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=3,739)

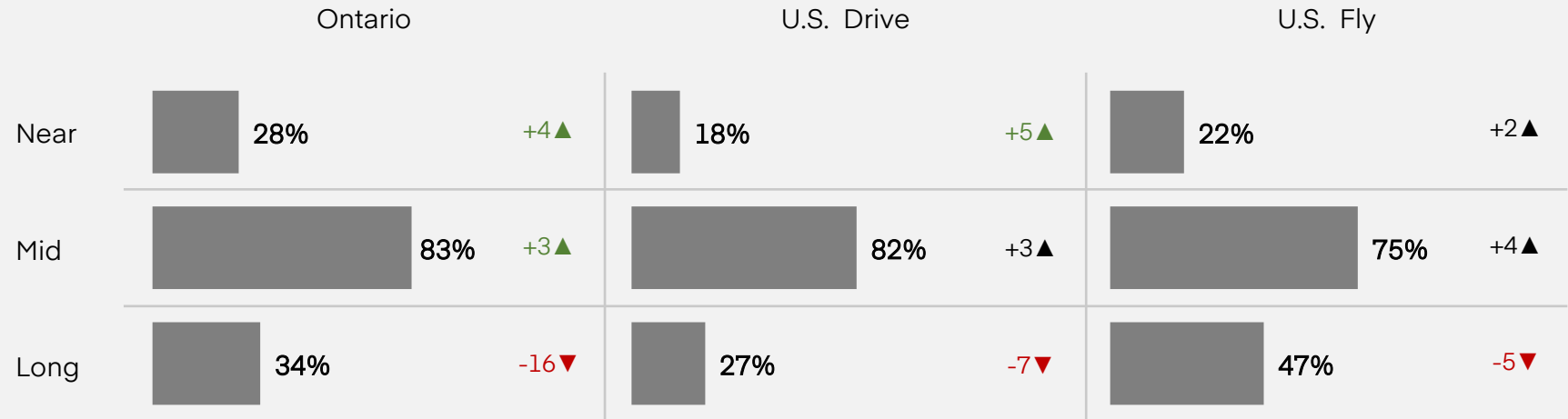
TRAVEL WINDOW: ONTARIO & U.S. VISITORS

Mid-term trip planning continues to lead across all three markets, with eight in ten Ontario and U.S. Drive travellers, and three-quarters of U.S. Fly travellers, considering a trip in this window.

Near-term travel intent has increased across all three markets, with the strongest lift among U.S. Drive visitors.

Long-term planning has dropped sharply across all three markets, particularly in Ontario, reinforcing a continued shift toward shorter planning horizons.

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=3,867)

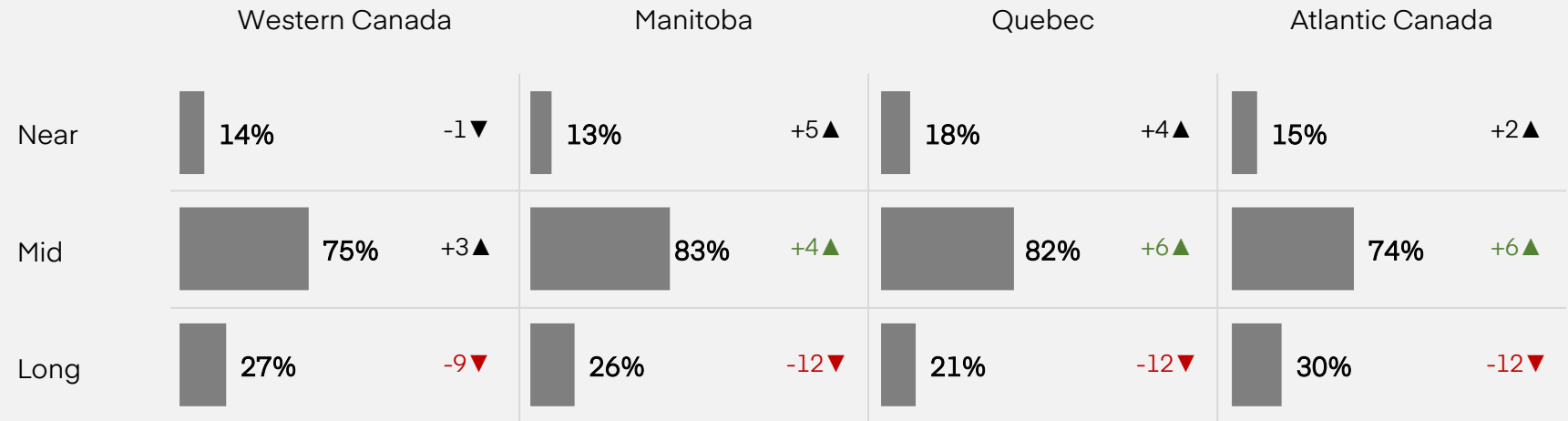
TRAVEL WINDOW: OTHER CANADIAN MARKETS

Mid-term trip planning continues to grow significantly across the rest of the Canadian markets, with about seven to eight in ten travellers considering a trip during this period.

Near-term planning is mostly up, led by Manitoba and Quebec.

Long-term planning has dropped meaningfully across all four markets, echoing the shift toward shorter planning windows.

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

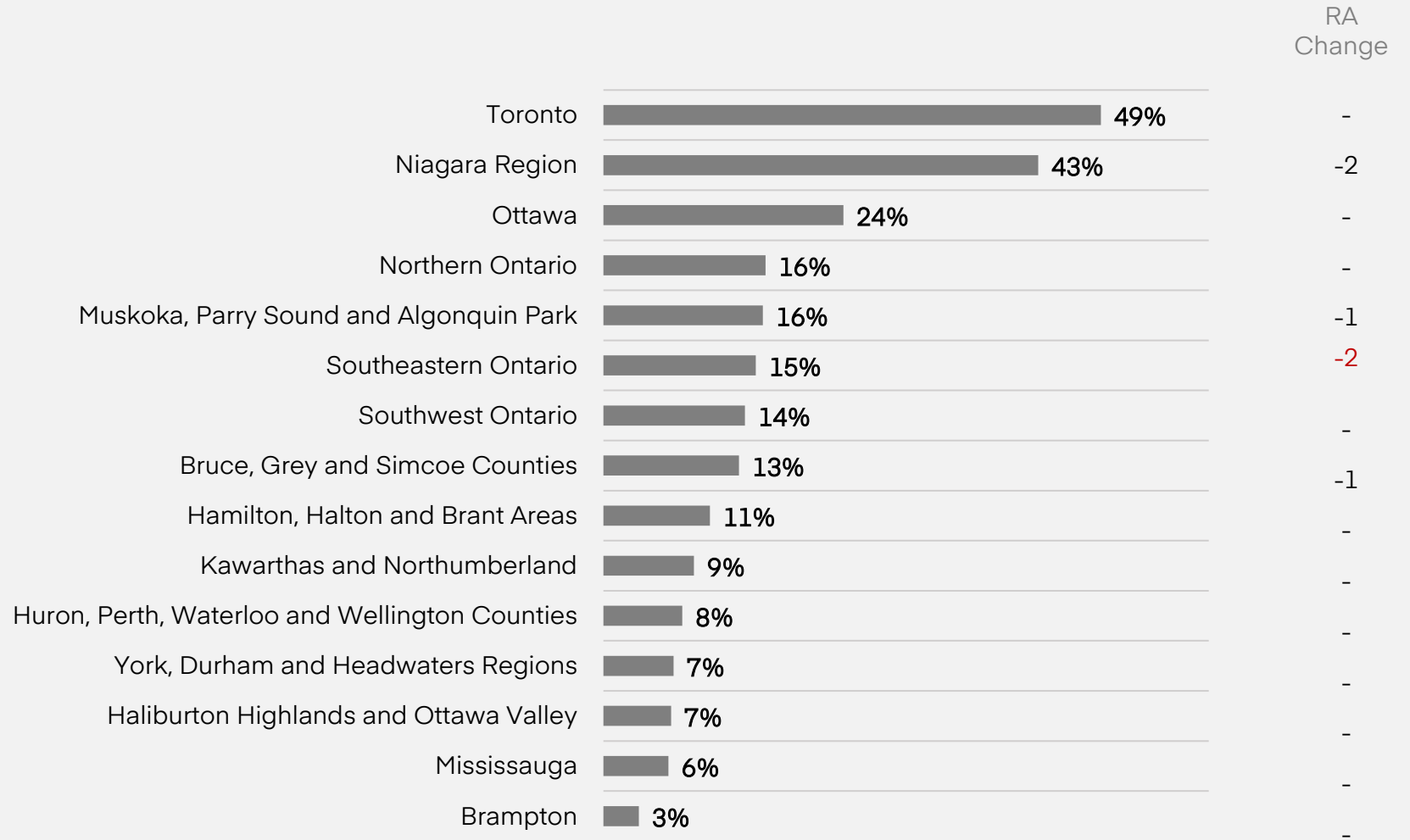


Note:
Bar = % of current month | ▲▼ = MoM Change

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=3,867)

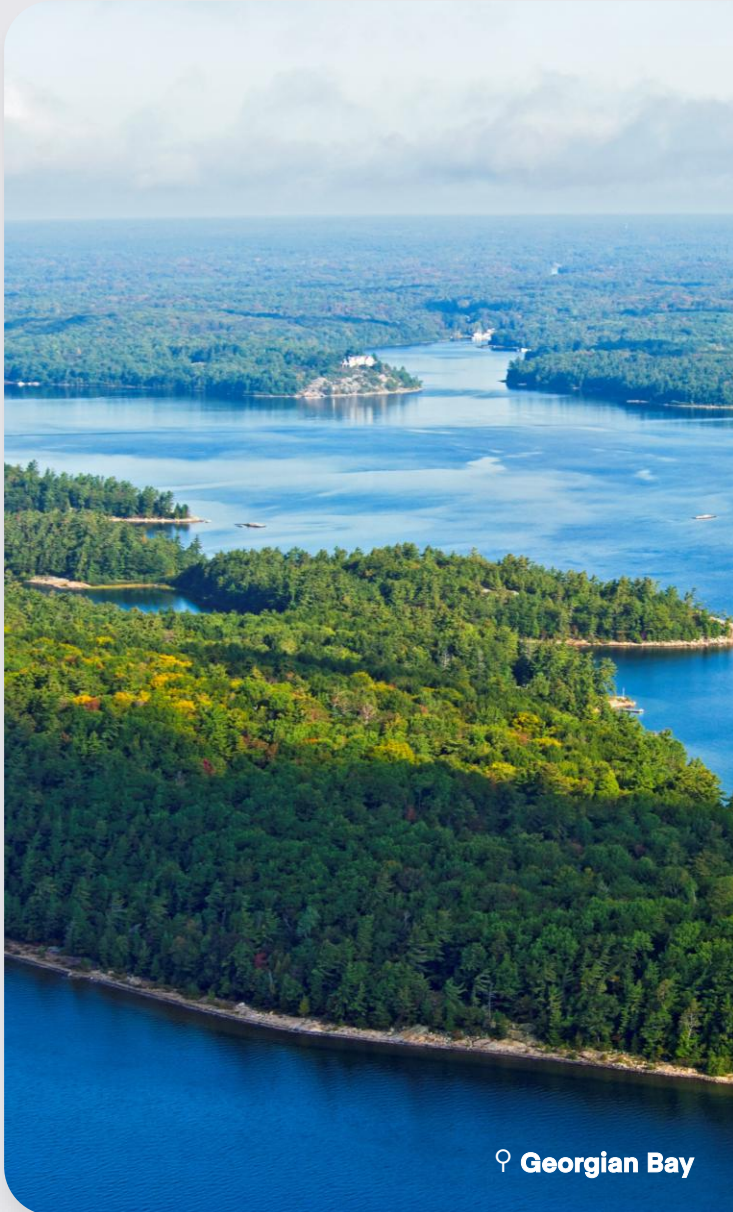
DESTINATION CONSIDERATION

Toronto and the Niagara Region remain 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 tenth consecutive 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=3,695)



BRAND PERCEPTION

Ontario continues to be viewed positively as a pleasure travel destination across all markets, with especially strong ratings from U.S. Fly travellers and Manitoba reaching its highest level to date.

The province is seen as offering unique experiences, strong short-trip appeal, and cultural diversity, while perceived value remains strongest on product quality, safety, environment, and service quality. Price continues to be the weakest area of perceived value.

Tags - Explore more on DOinsights.crg.ca

Travel Season

Seasonal Activities

Rating of Ontario

Perceived Value

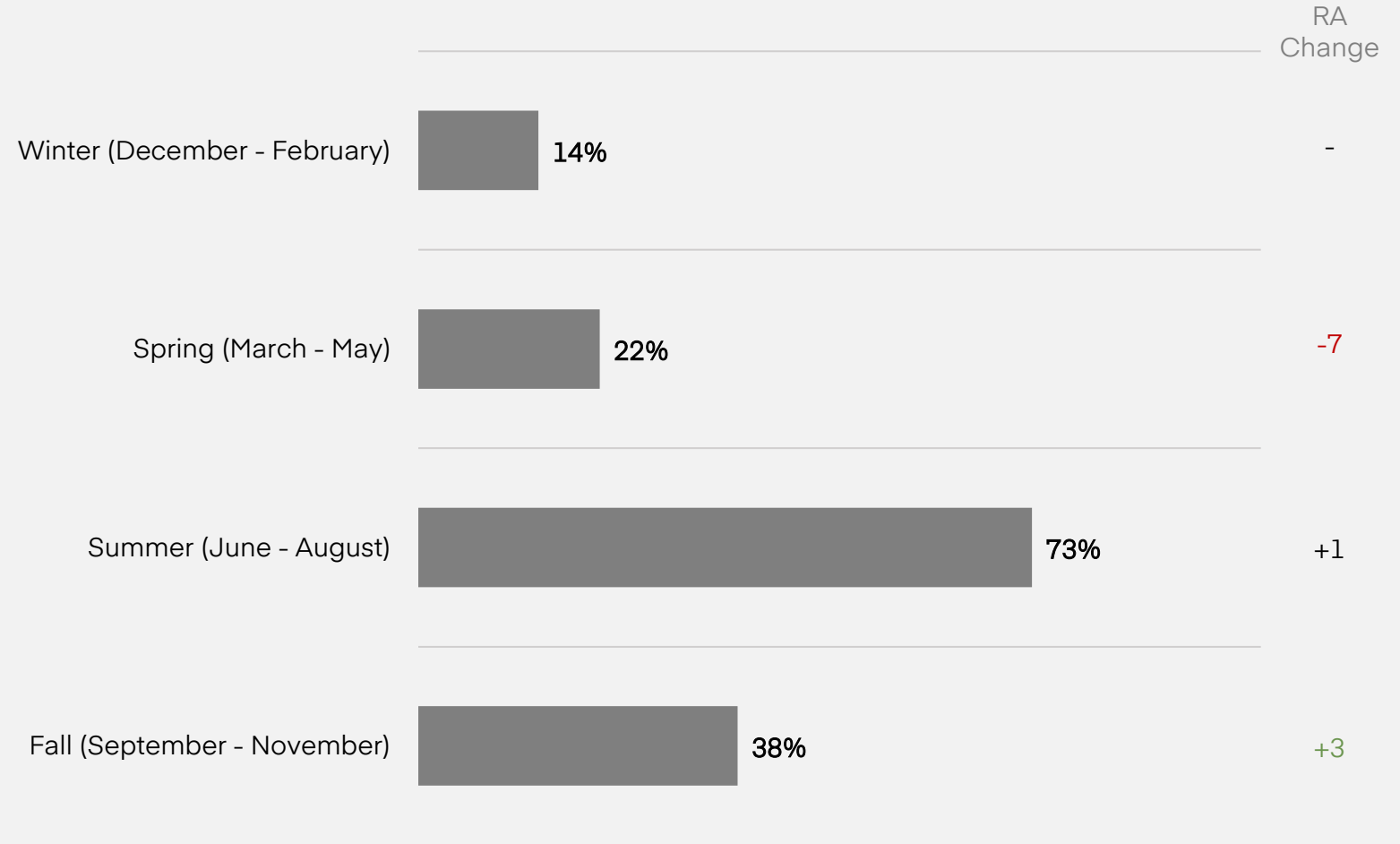
SEASONAL TRAVEL INTENT

Summer remains the dominant travel season, with seven in ten travellers planning a trip to Ontario between June and August.

Fall travel intent continues to gain momentum, while spring intent has dropped sharply this month. Winter remains low and stable.

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

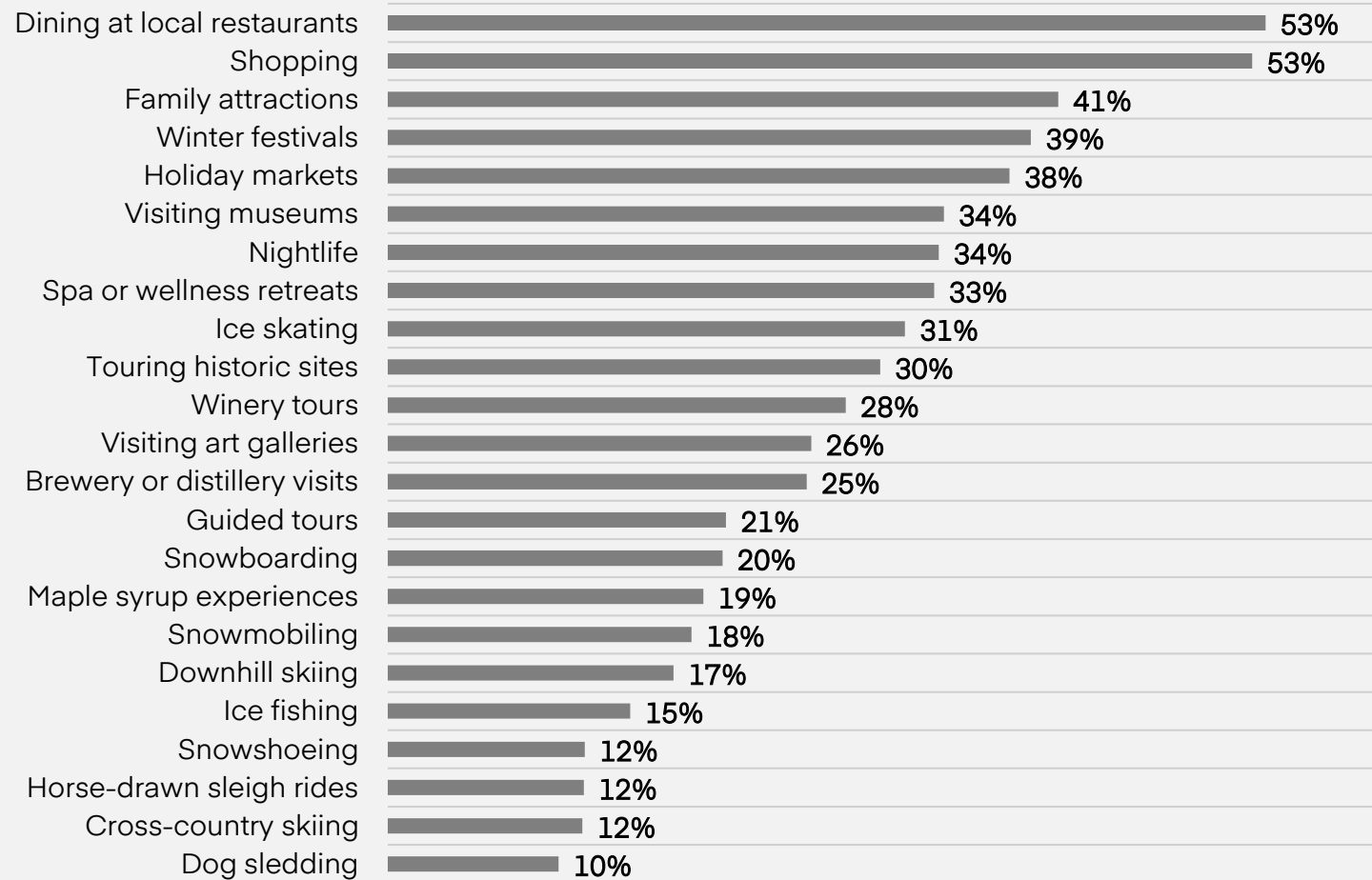
DOinsights.crg.ca



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=3,739)

TOP WINTER ACTIVITIES

Dining at local restaurants and shopping lead the list of planned winter activities for Ontario visitors, followed by family attractions and winter festivals. Although the order has shifted at times, these four activities have remained the dominant choices for the past eight months.



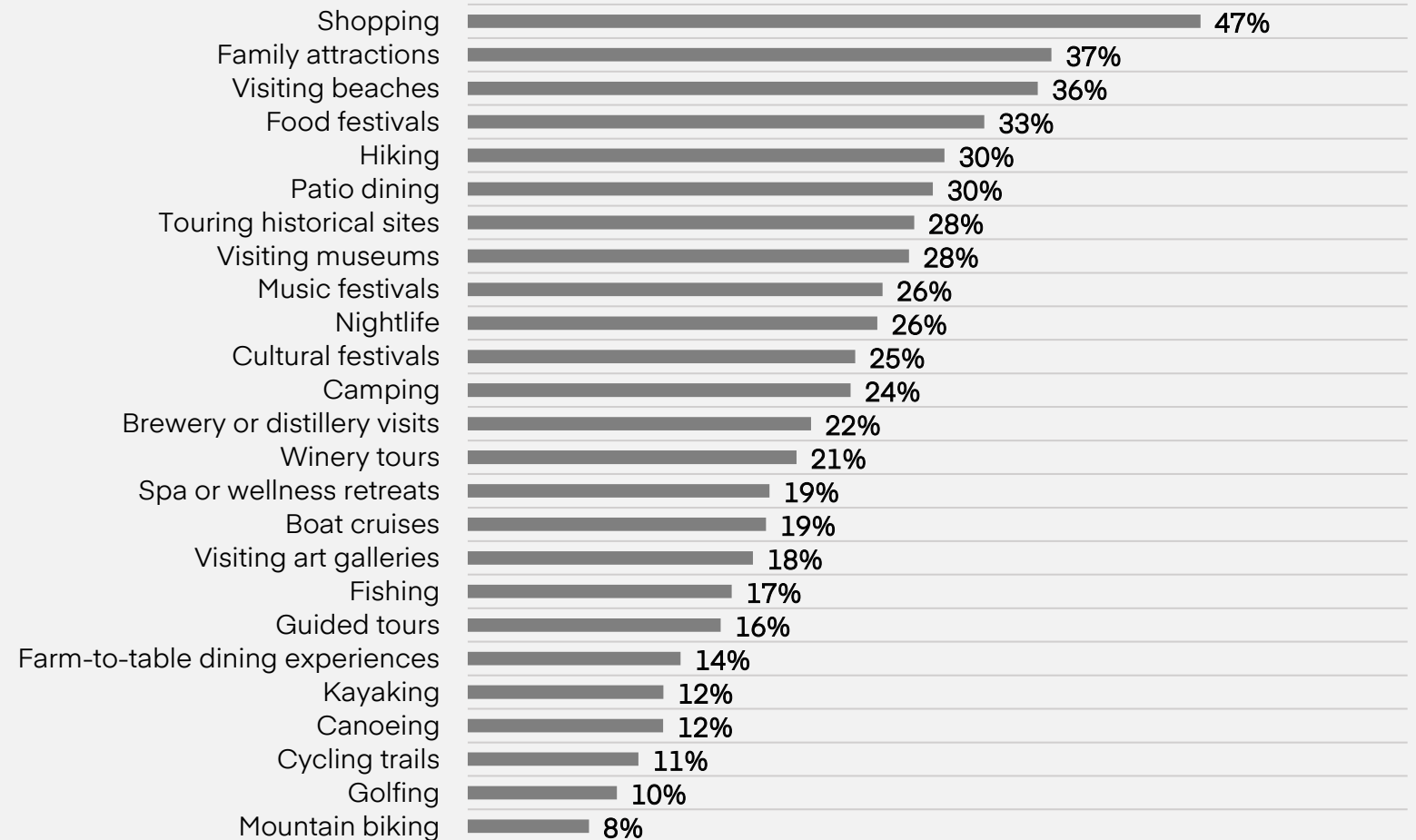
*Market analysis is available in the detailed data export on the DO Insights Portal

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=520)
 Only overall ≥ 5% shown

TOP SPRING/SUMMER ACTIVITIES

Shopping, family attractions, and visiting beaches remain the top planned spring and summer activities for Ontario visitors for the eighth consecutive month.

Food festivals, hiking, and patio dining round out the top six, showing a balance between cultural, outdoor, and lifestyle activities for spring and summer travel.



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=3,021)

Only overall ≥ 5% shown

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

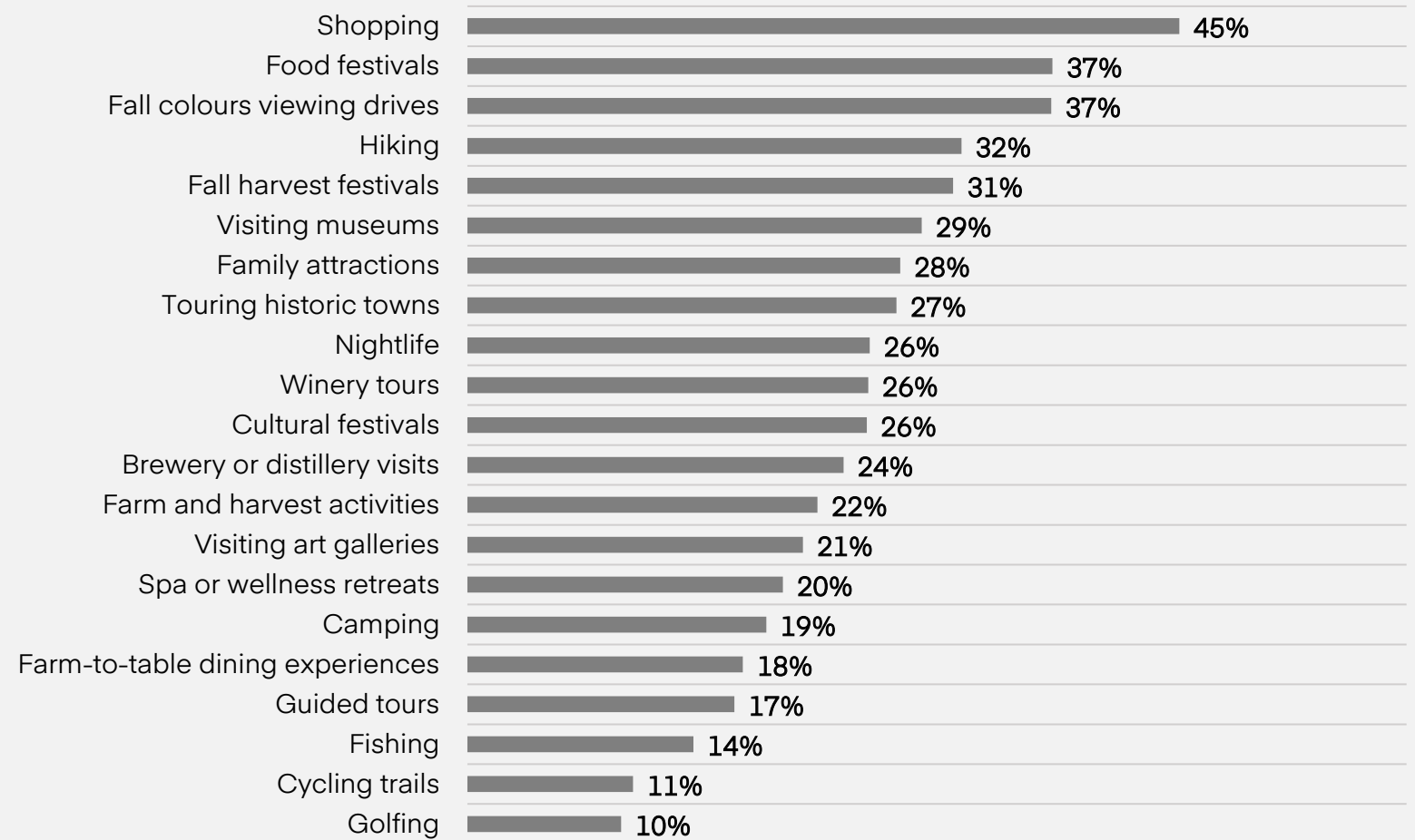
TOP FALL ACTIVITIES

Shopping, food festivals, fall colours viewing drives, and hiking lead the list of planned fall activities for visitors to Ontario.

These four activities have consistently ranked among the top choices for the sixth consecutive month, signalling stable interest for scenic and cultural experiences in the fall.

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

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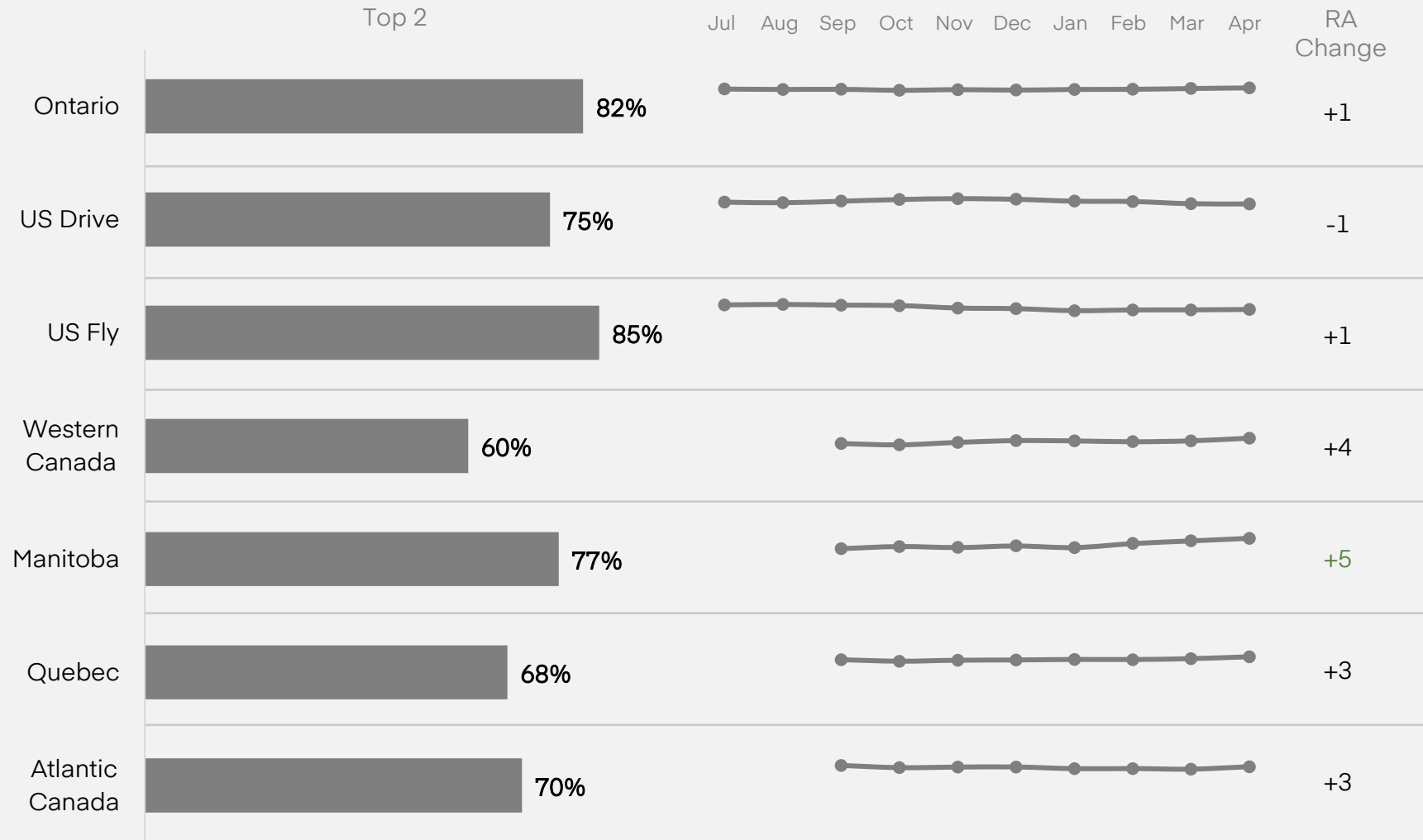
Q1BC. Thinking about your next planned pleasure trip to Ontario, Canada in the fall, which specific activities would you participate in? (Multi-select)
 Respondents who are thinking about travelling during the Fall months. (n=1,368)
 Only overall ≥ 5% shown

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 among Ontario residents.

Travellers from Manitoba report a significant upward shift this month, reaching their highest level to date and continuing a consistent positive trend.

Western Canada, Quebec, and Atlantic Canada also show notable improvements compared to last month.

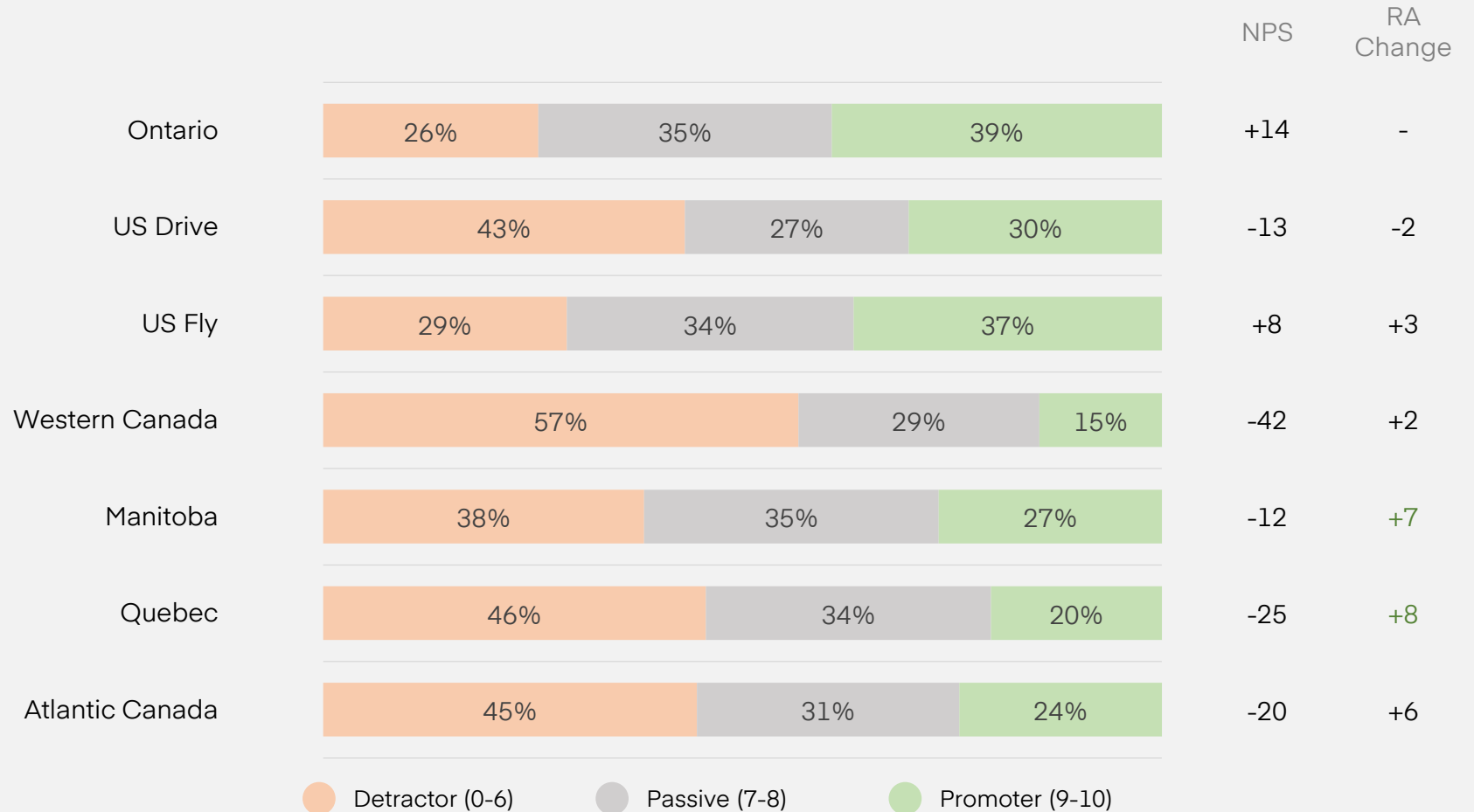


Q3. How would you rate Ontario, Canada as a pleasure travel destination? (5-point scale)
All respondents. (n=5,635)

NET PROMOTER SCORE

Ontario stands out with the strongest advocacy, continuing to show a positive NPS, and U.S. Fly follows with a moderate positive advocacy.

Manitoba, Quebec, and Atlantic Canada have seen meaningful increases in NPS compared to last month, driven by gains in the share of promoters.

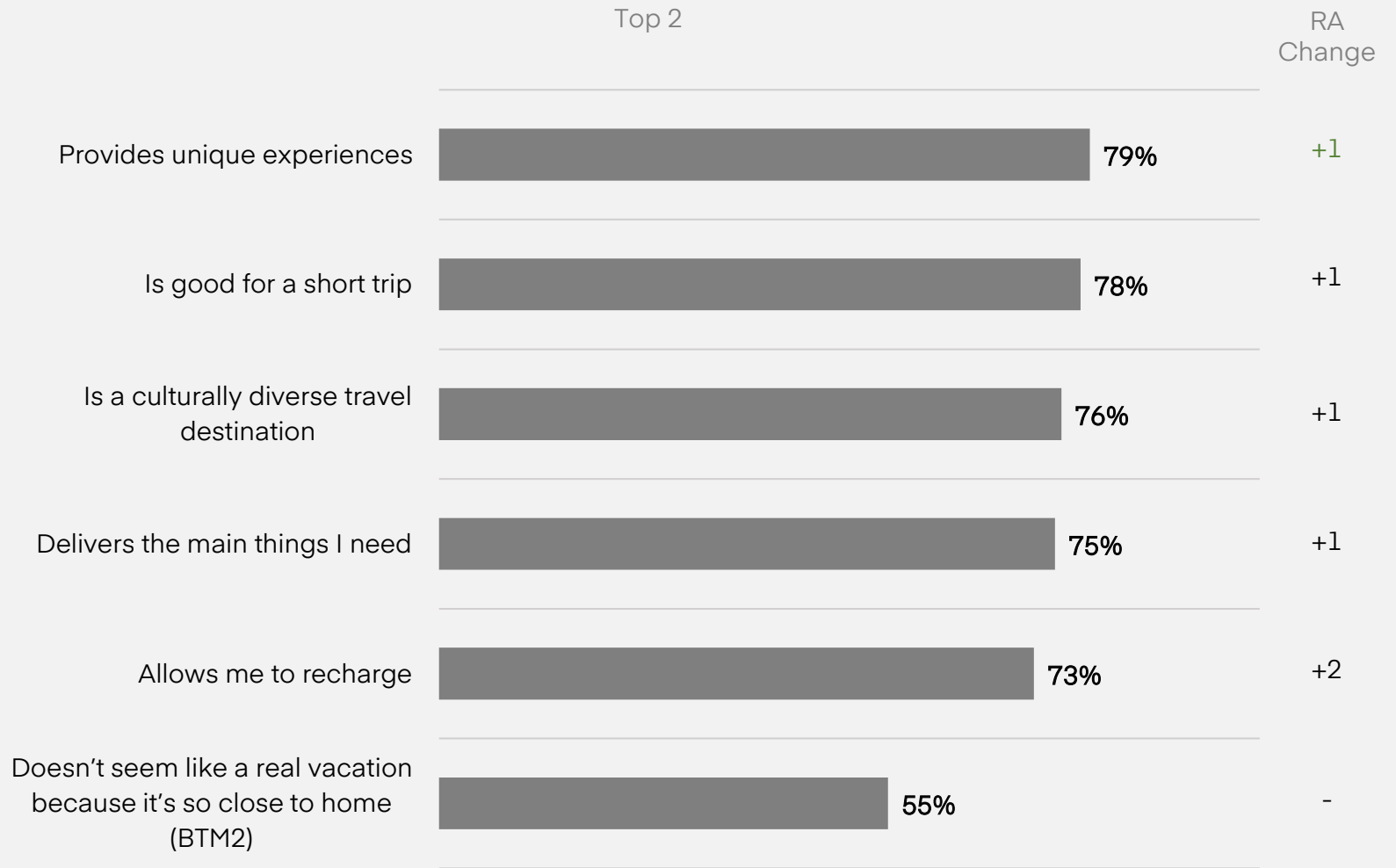


Q4. How likely are you to recommend Ontario, Canada to friends or colleagues as a travel destination for a short getaway or vacation? (11-point scale)
 All respondents. (n=6,036)

DESTINATION IMAGE OF ONTARIO

Ontario remains widely recognized for delivering unique experiences, being a top choice for short trips, and offering cultural diversity.

The perception that Ontario "doesn't seem like a real vacation because it's so close to home" has remained stable.

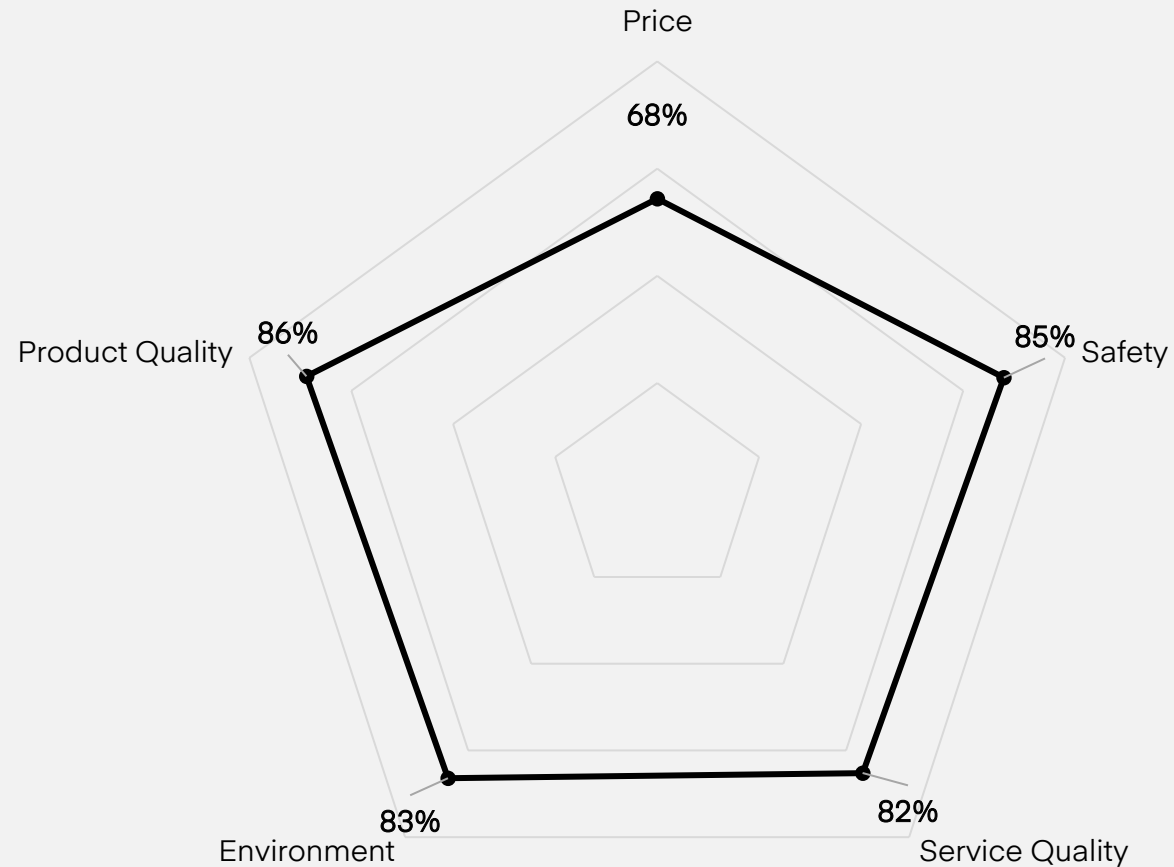


Q5. Thinking about Ontario, Canada as a travel destination, how much do you agree or disagree that Ontario...? (Excludes "don't know") (5-point scale)
All respondents. (n=5,531)

CONSUMER PERCEIVED VALUE

Overall, Ontario continues to be perceived as offering strong value to travellers, especially when it comes to product quality and perceived safety.

This sentiment remains consistent with the previous months, with price continuing to be the weakest area of perceived value.



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=1,194)



TRAVEL INFORMATION RESEARCH

Travel information search remains highest among U.S. Fly travellers, while Ontario residents continue to gradually increase information seeking since December 2025.

General internet search, booking and review sites, and social media remain the dominant information sources, with Instagram, YouTube, and Facebook leading social media usage.

AI continues to become a more visible part of the travel planning journey, and ChatGPT remains the leading AI trip-planning tool and is used most often for researching attractions, finding destination ideas, and getting travel advice.

Tags - Explore more on DOinsights.crg.ca

Travel Information

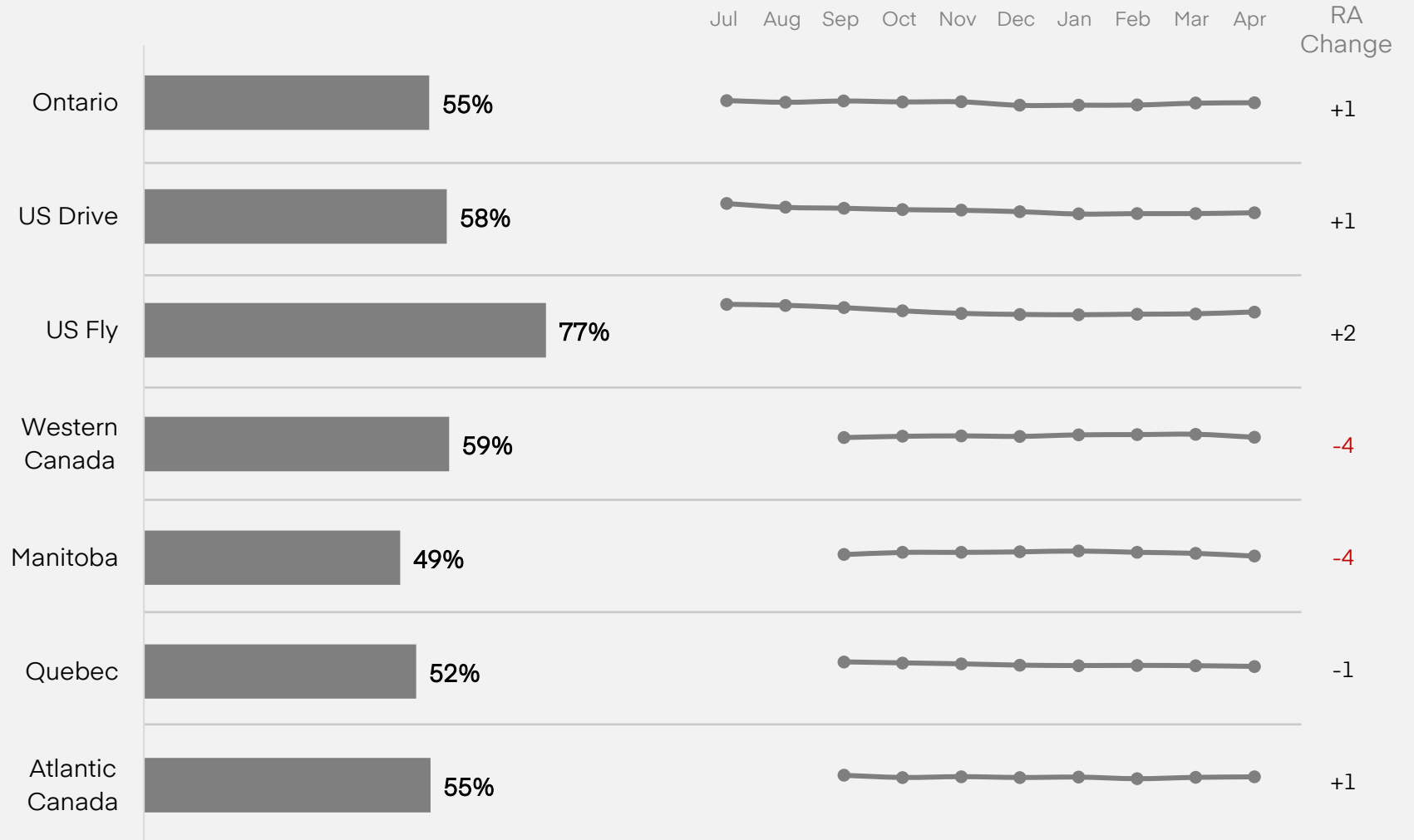
Media Usage

AI tools

INFORMATION SEARCH

Looking for travel information remains highest among U.S. Fly visitors, with continued growth this month.

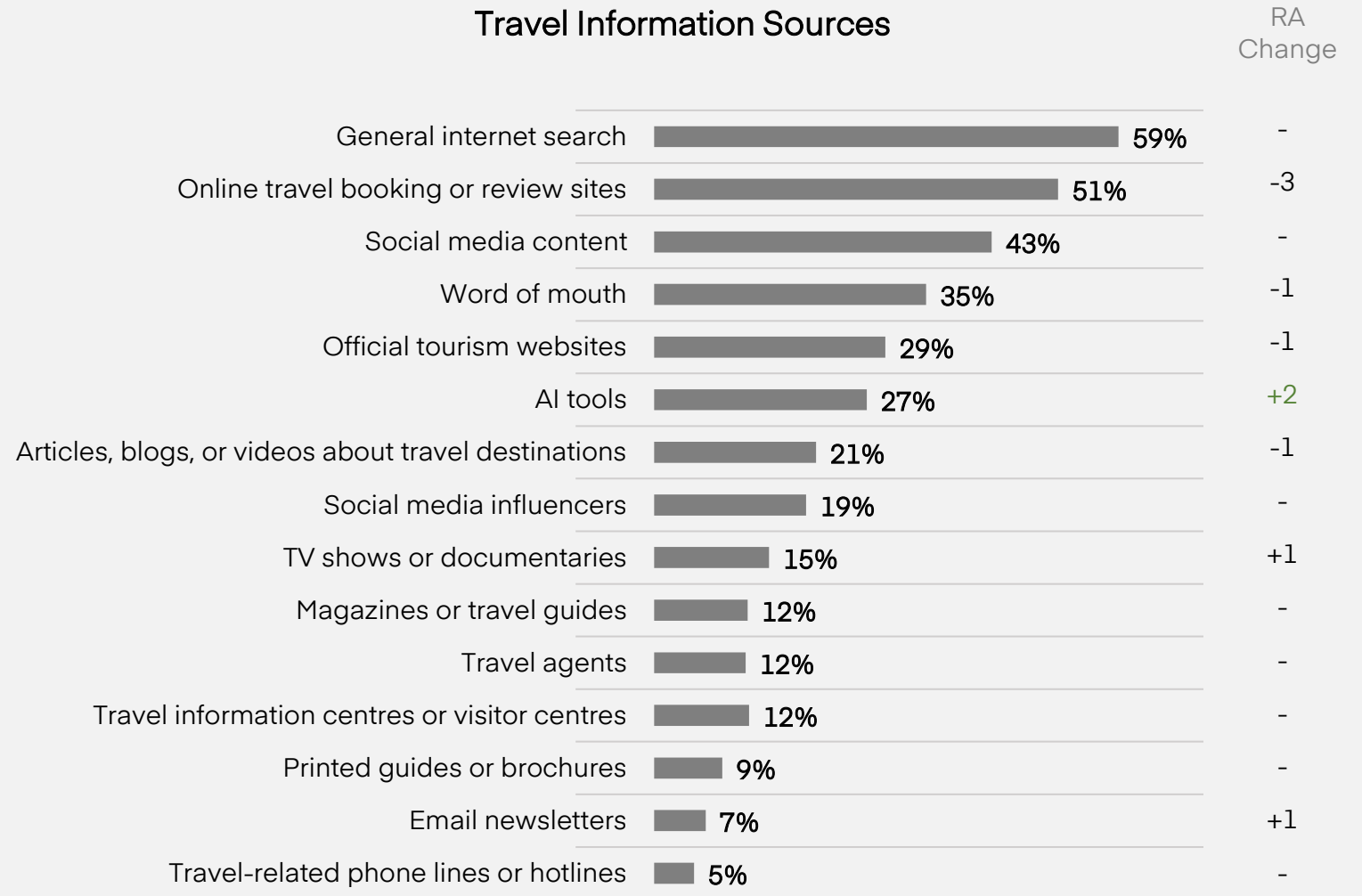
Looking for travel information has been on a subtle upward trend among Ontario residents since December 2025, while Western Canada and Manitoba both saw significant declines this month.



I1. In the past month, have you looked for information about travelling? (Single-select)
All respondents. (n=6,036)

ONTARIO TRAVEL INFORMATION SOURCES

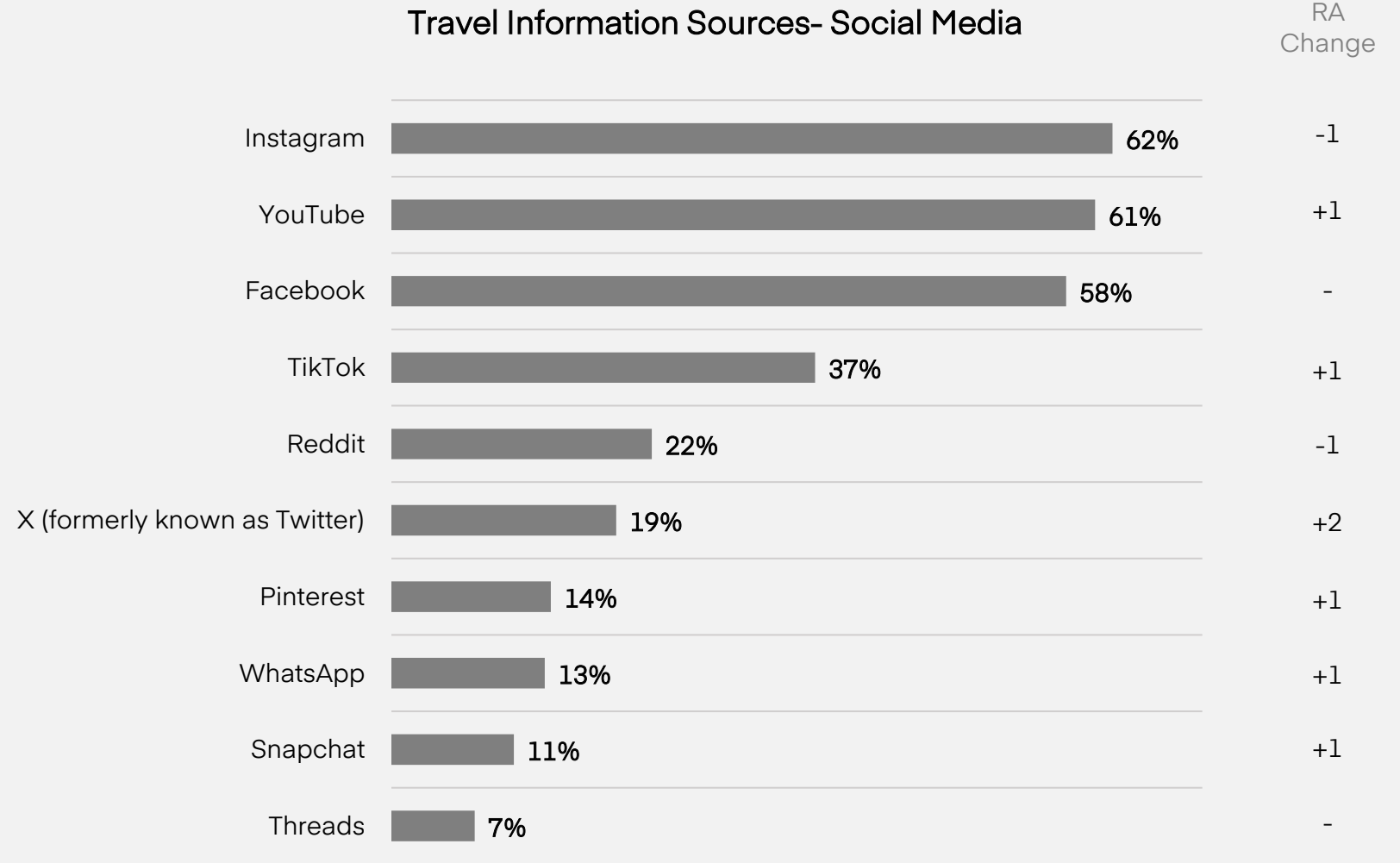
General internet search, online travel booking or review sites, and social media remain the primary sources travellers use when seeking information about visiting Ontario, marking the tenth consecutive month of this pattern. AI tools continue to gain traction this month.



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=3,472)
 Only overall ≥ 5% shown

SOCIAL MEDIA USAGE FOR TRAVEL INFORMATION

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

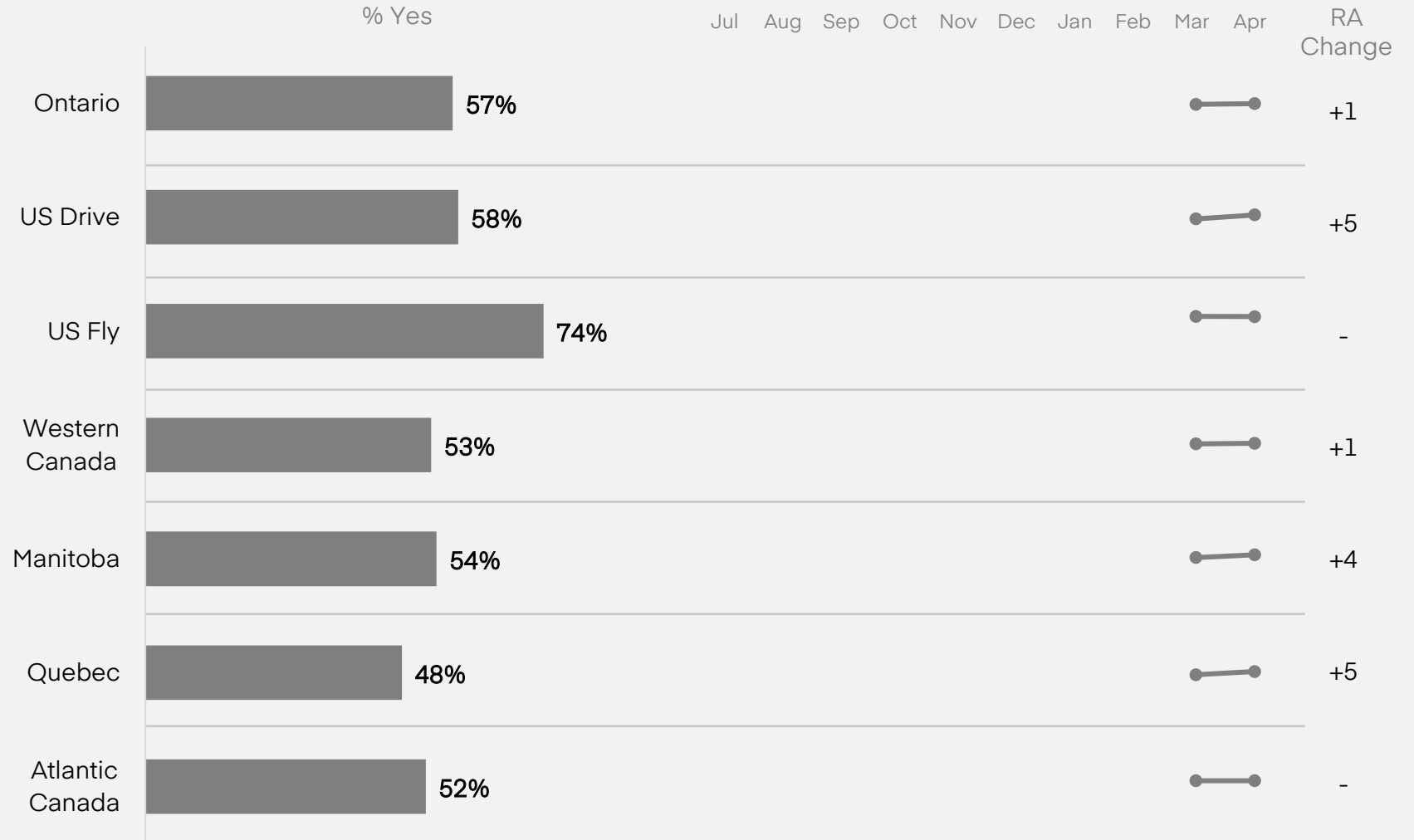


I3. Which social media platforms did you use to obtain information about travelling? (Multi-select)
 Respondents who use social media for travel information. (n=1,706)
 Only overall ≥ 5% shown

AI TRAVEL SUMMARIES: AWARENESS

Awareness of AI-generated summaries in travel search results remains highest among U.S. Fly travellers, making them the market most exposed to AI-powered search results like Google or Bing.

U.S. Drive, Manitoba, and Quebec all show some increases in awareness this month. Quebec, while still the lowest among Canadian markets, is closing the gap.

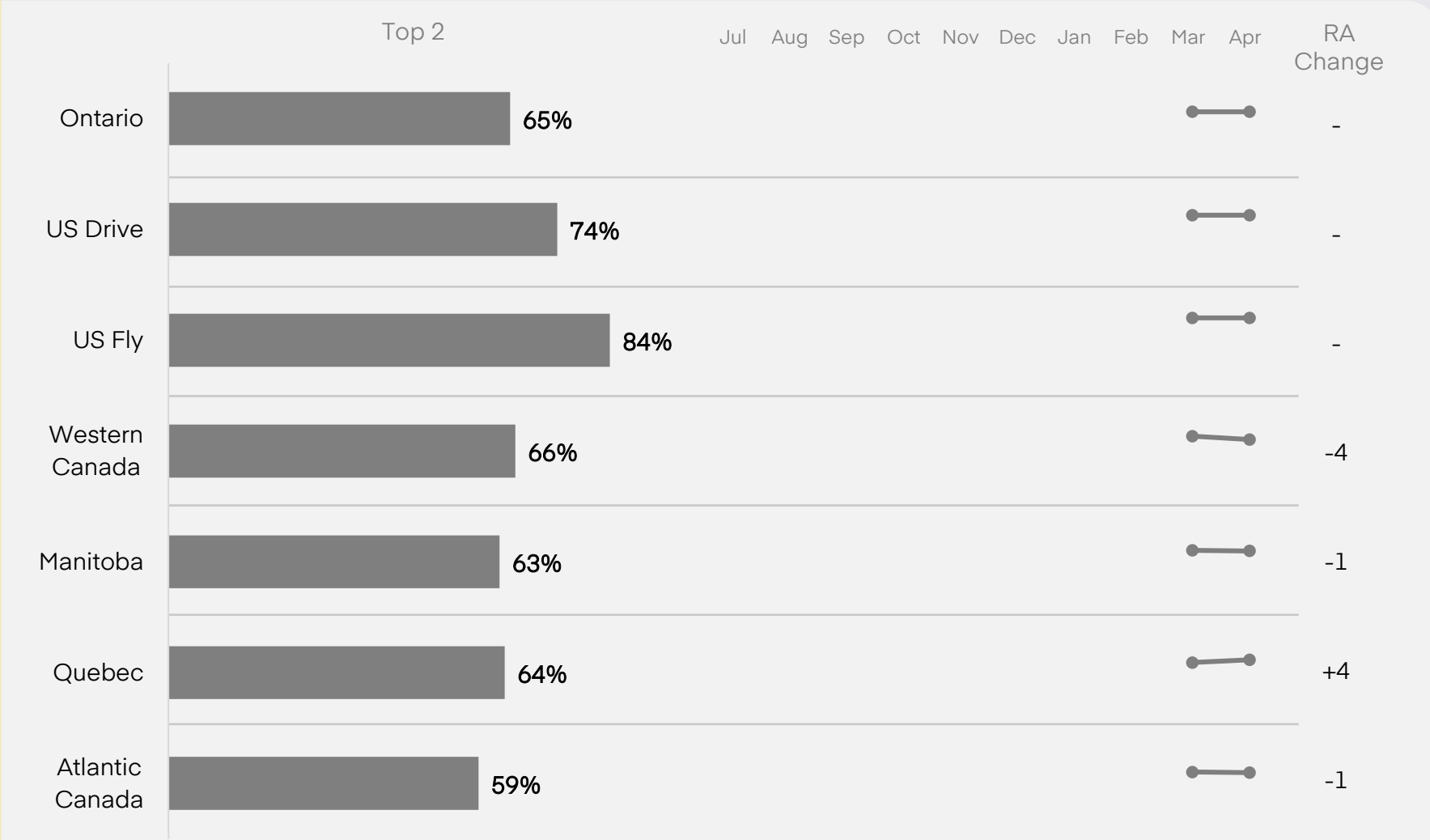


17. In the past 12 months, when searching online for travel information, have you noticed AI-generated summaries or answers appearing in your search results (for example, a summary box at the top of a Google or Bing search)?
All respondents. (n=4,018)

AI TRAVEL SUMMARIES: PERCEIVED USEFULNESS

Among travellers who notice AI-generated summaries in search results, perceived usefulness remains high across all markets, led by U.S. Fly and U.S. Drive.

Quebec showed the largest gain this month, while Western Canada eased slightly.

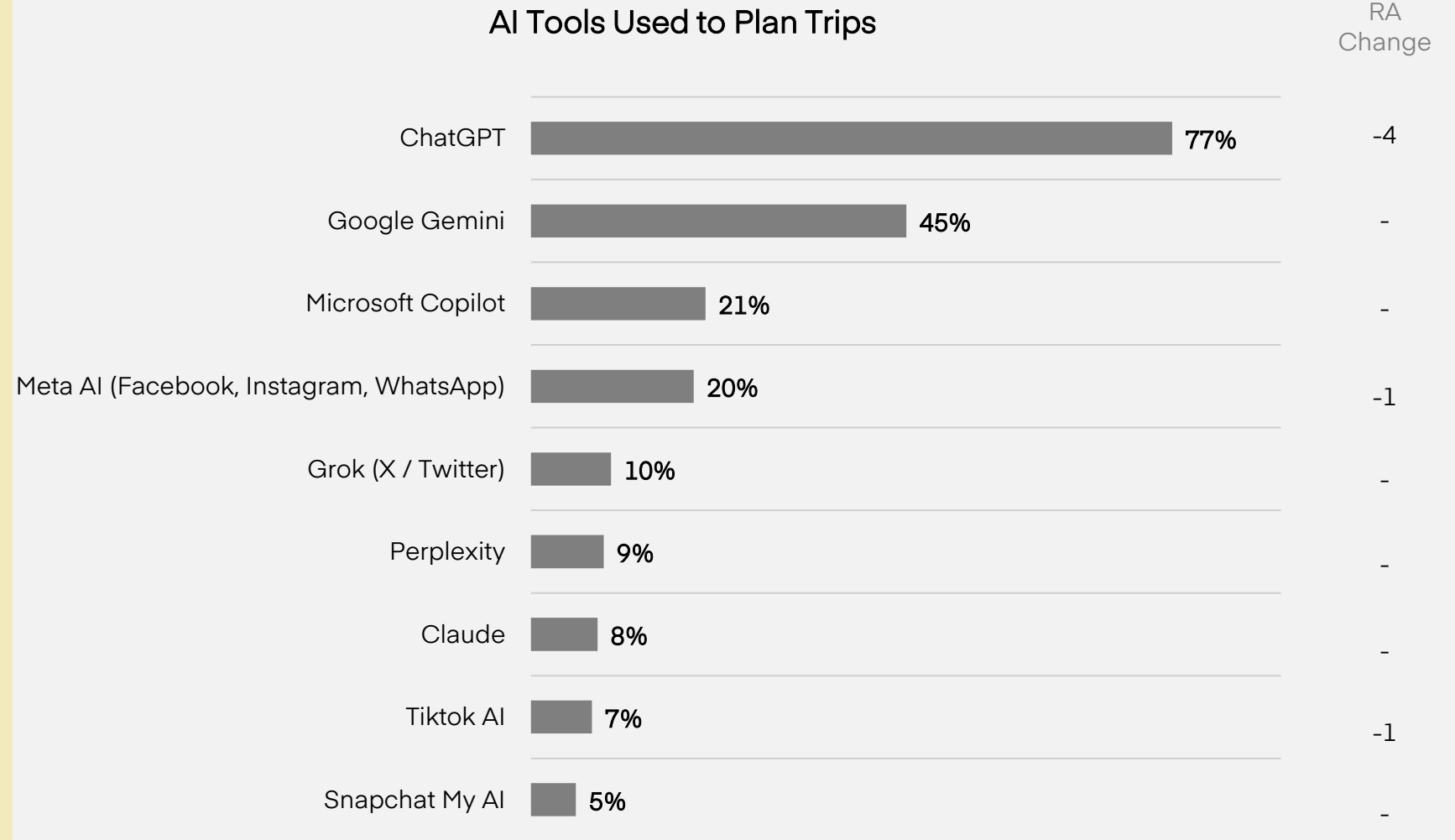


AI TRIP-PLANNING TOOLS

ChatGPT continues to dominate as the primary AI tool used to plan trips, although usage softened slightly compared to last month.

Google Gemini follows in second place, while Microsoft Copilot and Meta AI round out the main group of planning assistants.

Other tools such as Grok, Perplexity, Claude, TikTok AI, and Snapchat My AI also appear in trip planning, but at a secondary level.



14B. Which AI tools did you use to help plan your trip(s)? Please select all that apply. (Multi-select)
Respondents who have used AI tools to plan their trip. (n=1,169)
Only overall ≥ 5% shown

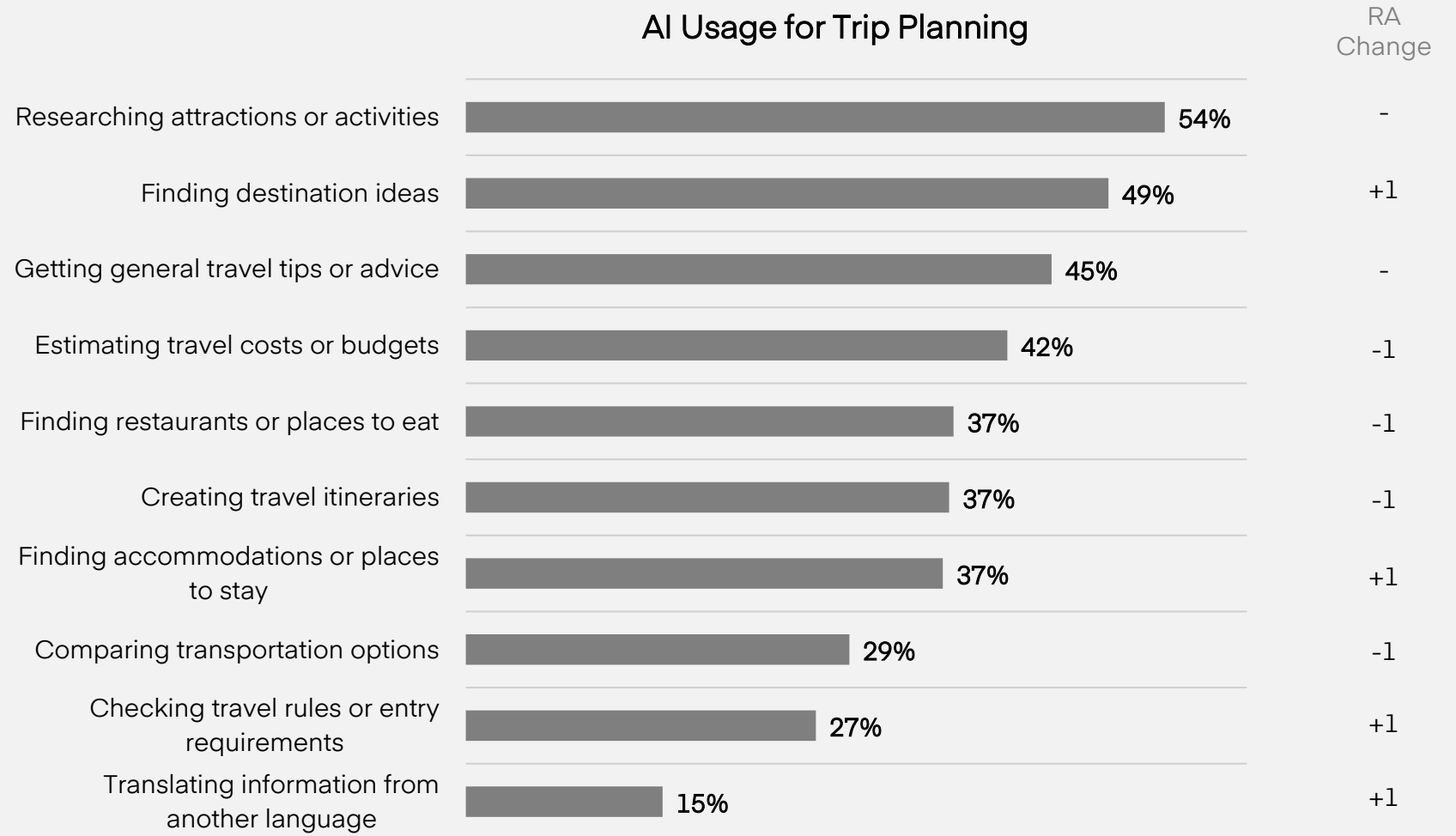
AI ASSISTANCE IN TRAVEL PLANNING

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 for the seventh consecutive month.

Estimating travel costs, finding restaurants, creating itineraries, and finding accommodations round out the most common use cases.

AI Usage for Trip Planning

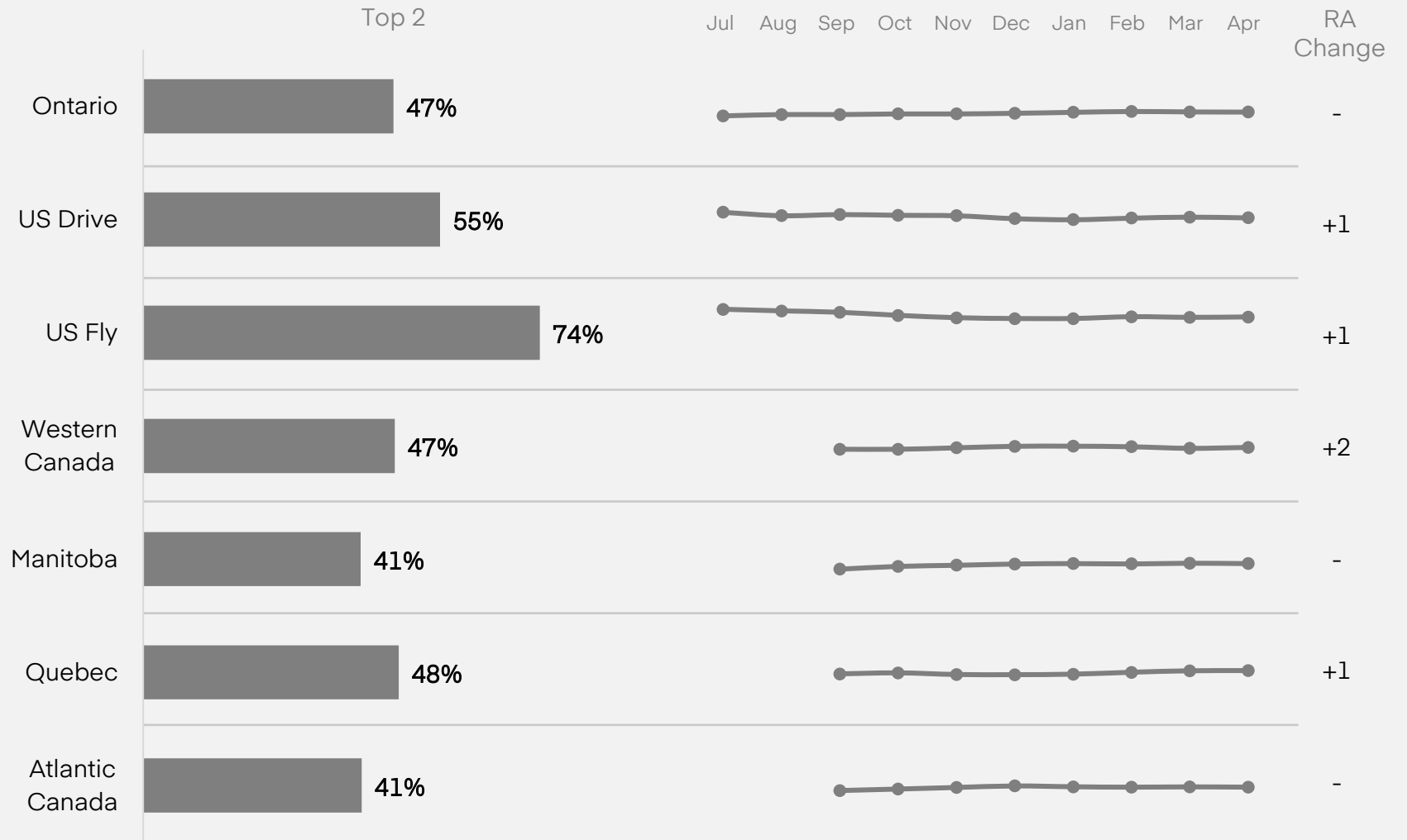


15. How did you use AI tools when planning your trip(s)? (Multi-select)
 Respondents who used AI tools to help plan a trip in the past 12 months. (n=1,896)
 Only overall ≥ 5% shown

LIKELIHOOD OF USING AI TOOLS

Interest in using AI tools for trip planning is highest among U.S. travellers, particularly in the Fly market.

Canadian regions show more moderate intent, with Ontario, Quebec, and Western Canada closely clustered, while Manitoba and Atlantic Canada remain the lowest.



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=5,600)



♀ Blue Mountain

PERCEPTION OF ECONOMIC AND POLITICAL CONDITIONS

Cost remains the leading barrier to travelling to Ontario, and concern about transportation costs continues to rise.

Attitudes toward travel remain relatively stable across most regions, with U.S. Fly travellers the most likely to see travel as a worthwhile investment and Quebec the lowest.

Financial pressures continue to shape travel plans across most markets, with Ontario travellers remaining the most likely to choose in-province travel. Perceptions of the U.S.-Canada relationship remain largely consistent, with optimism improving across most markets. Canada continues to rank as the most welcoming country among U.S. travellers.

Tags - Explore more on DOinsights.crg.ca

Political Concerns

Exchange Rate

Financial Pressures

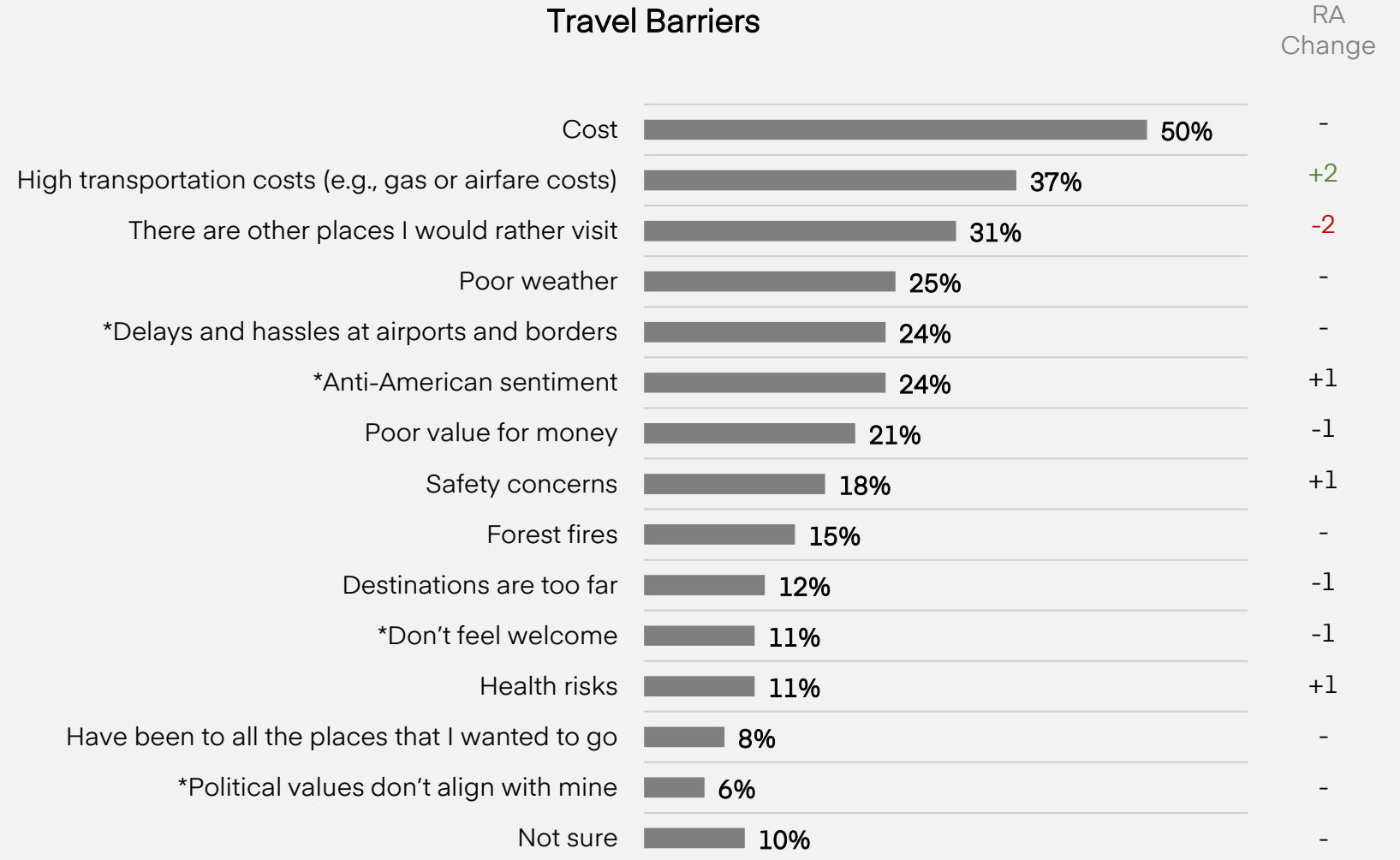
Payment Plans

BARRIERS IMPACTING ONTARIO TRAVELS

Cost remains the top barrier to travelling to Ontario, cited by half of travellers for the 10th consecutive month.

Concern about high transportation cost continue to increase significantly, remaining as the second highest barrier. This affects Canadian travellers more than Americans, while American travellers share poor weather as one of their top barriers.

In addition, respondents shared a significant decrease for wanting to visit other places than Ontario compared to the previous month.



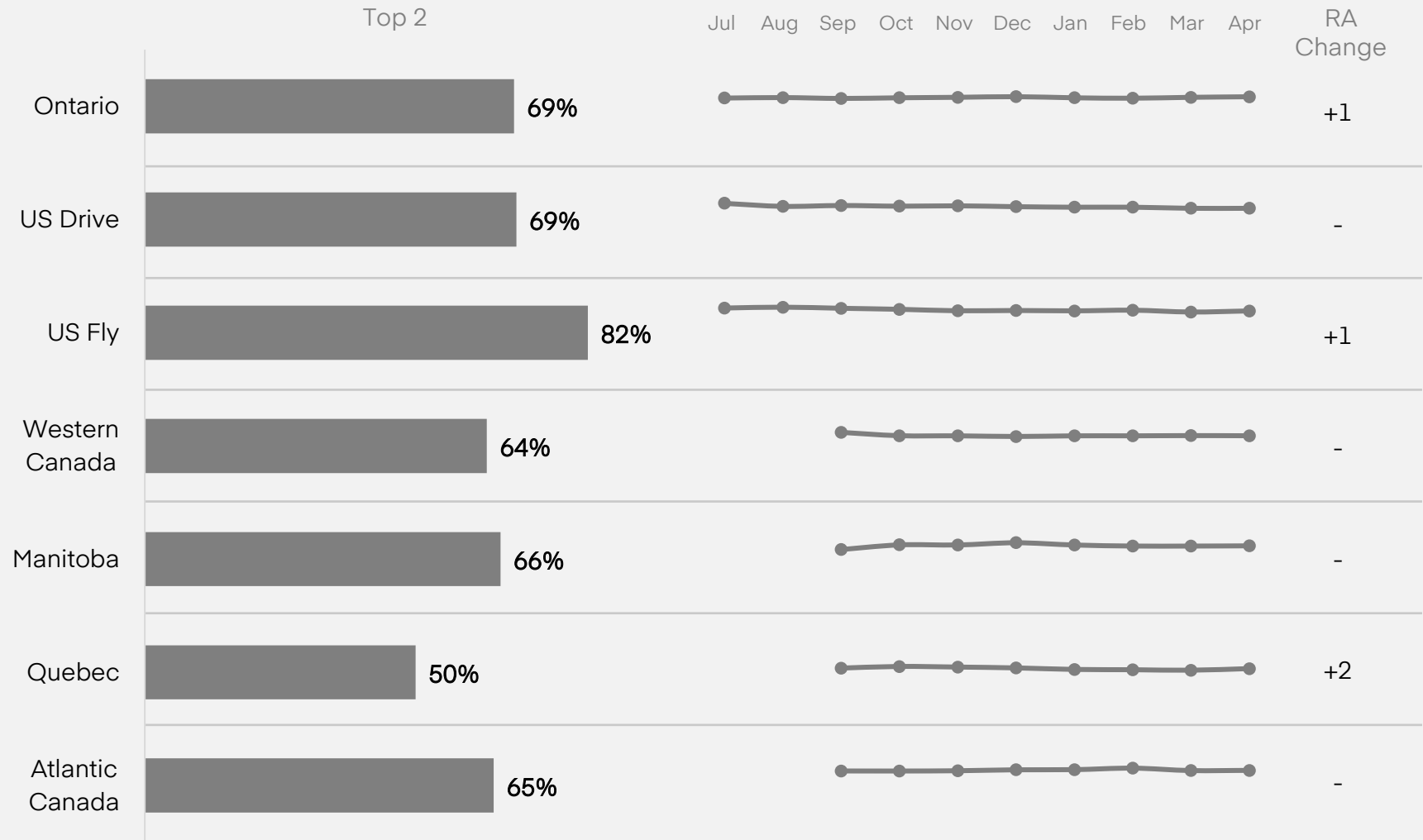
Note: Asterisk indicates U.S. only

T3. Which of the following factors might discourage you from taking a pleasure trip in Ontario, Canada? (Multi-select)
All respondents. (n=1,336)

TRAVEL AS A WORTHWHILE INVESTMENT

U.S. Fly travellers remain the most likely to see travel as a worthwhile investment and Quebec travellers continue to report as the lowest.

Despite ongoing economic pressures, attitudes toward travel have remained relatively stable across most regions, with small upticks in Ontario, U.S. Fly, and Quebec.



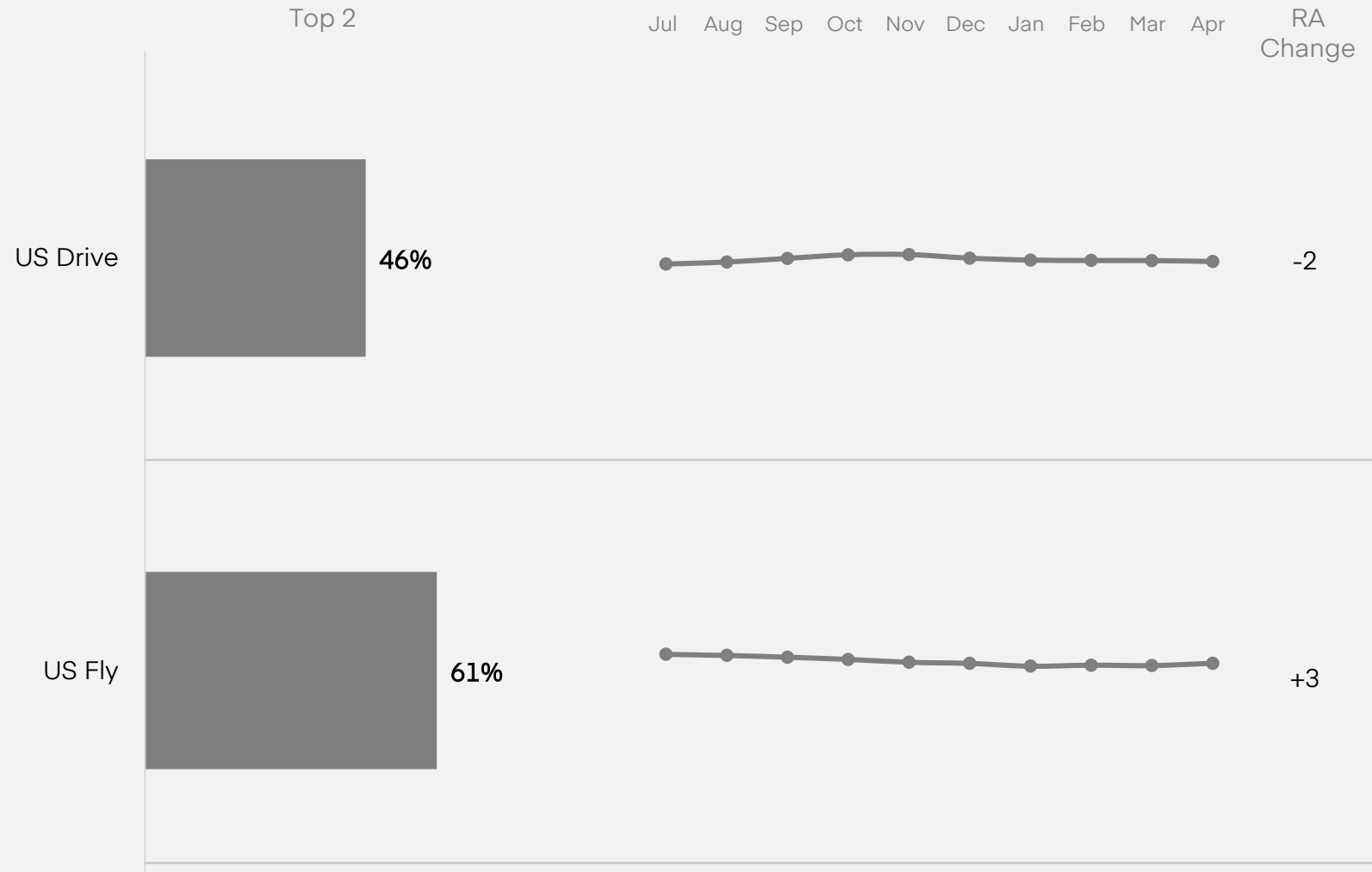
T4. How much do you agree or disagree with the following statements? [I feel travel is a worthwhile investment, even in the current economic climate.] (Excludes "don't know") (5-point scale)
All respondents. (n=5,915)

INFLUENCE OF EXCHANGE RATE ON TRAVEL TO ONTARIO

The exchange rate continues to be a stronger motivator for U.S. Fly travellers than for U.S. Drive travellers.

U.S. Fly travellers showed an increase this month, while U.S. Drive eased slightly.

Overall, the sentiment has remained relatively stable compared to the previous months.



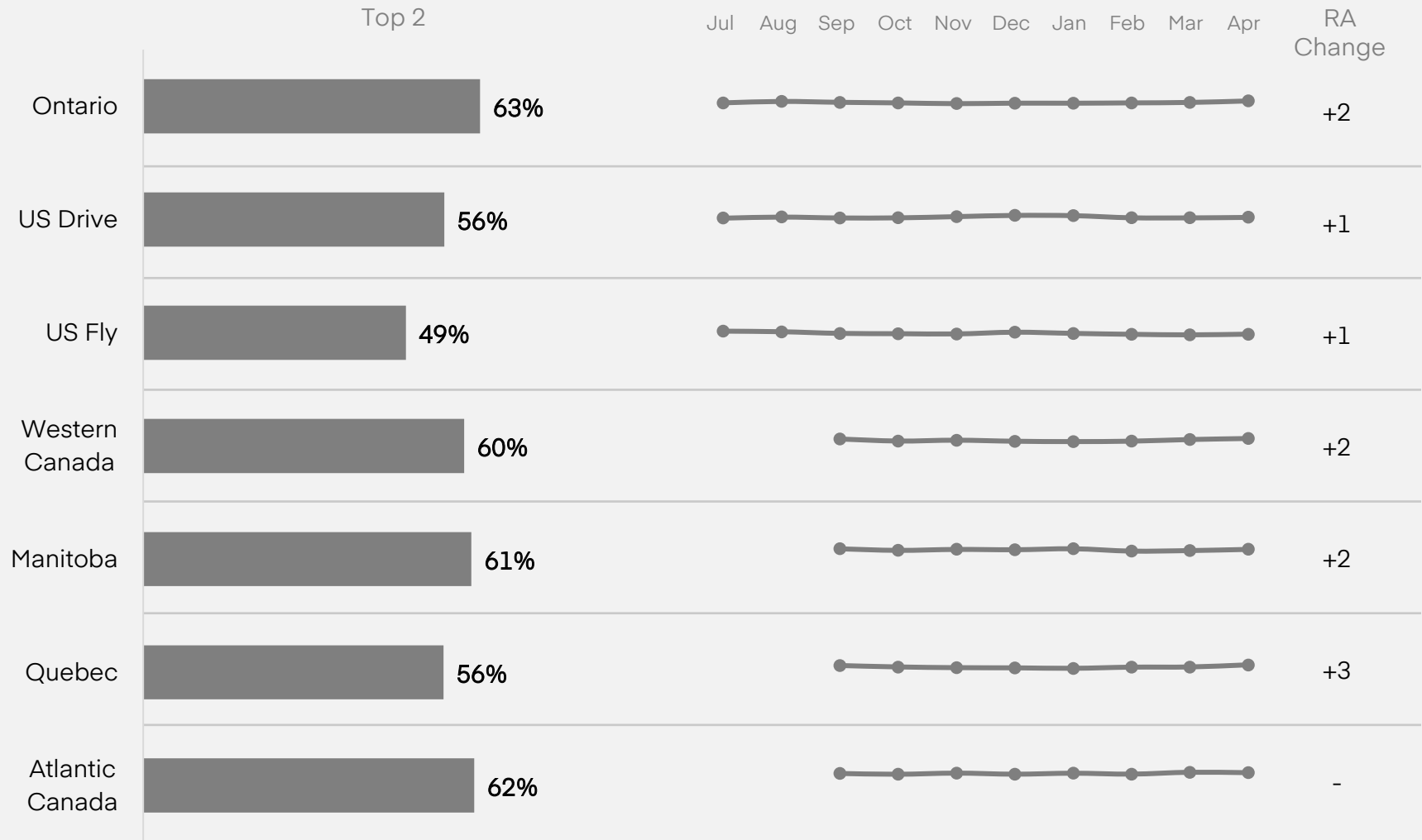
T4. How much do you agree or disagree with the following statements? [I am more likely to travel to Ontario, Canada in the next 12 months because of the favourable exchange rate.] (Excludes "don't know") (5-point scale)
 All respondents from U.S. Drive and U.S. Fly. (n=1,444)

FINANCIAL PRESSURES IMPACTING FUTURE TRAVEL PLANS

Financial pressures continue to impact travel plans across regions, as a slight increase is captured among all markets, except for Atlantic Canada.

Ontario, Atlantic Canada, and Manitoba remain the top markets most affected by financial pressures, closely followed by Western Canada.

In contrast, U.S. Fly travellers continue to report being the least affected.



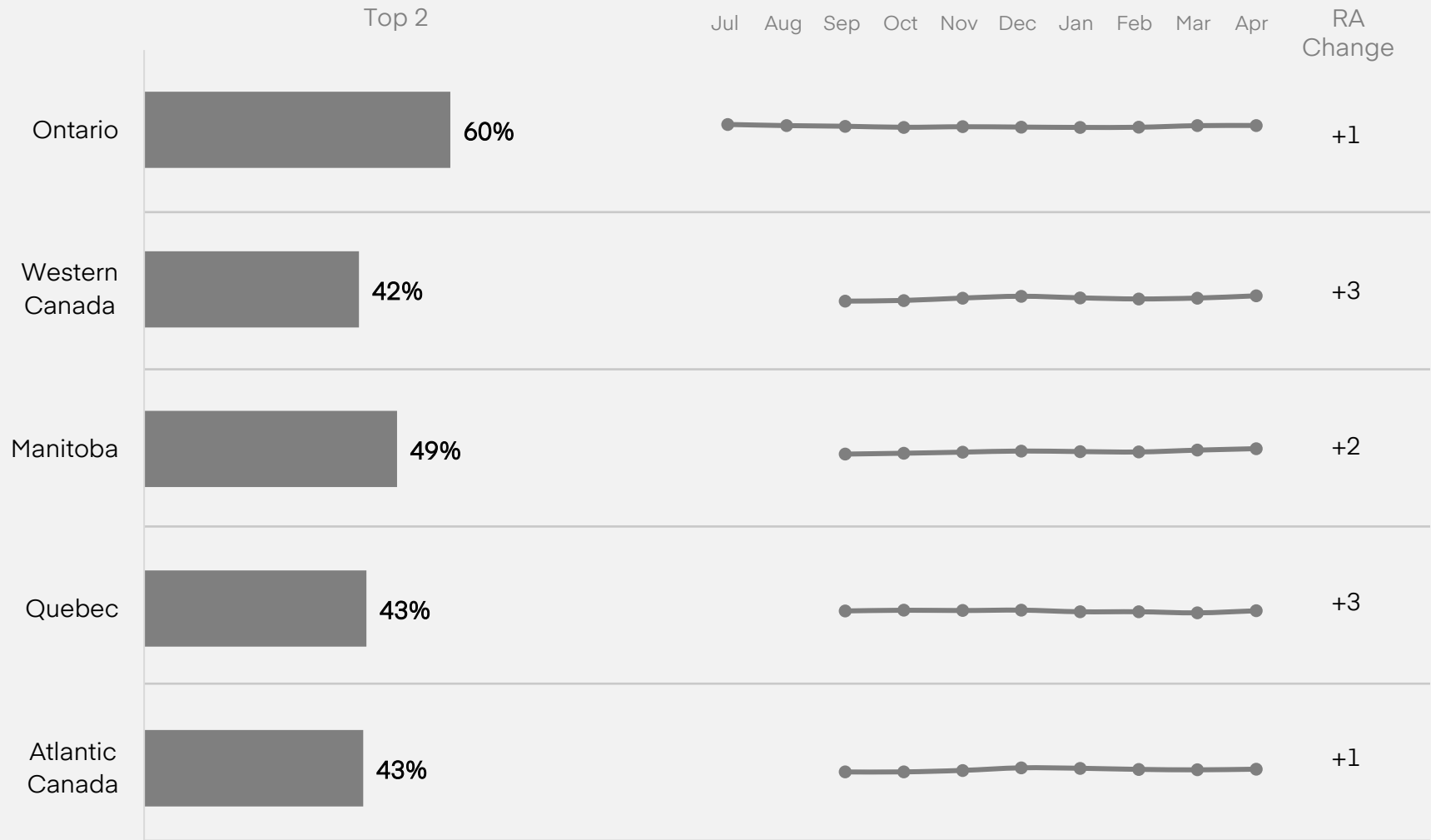
T5. How much do you agree or disagree with the following statement? [Financial pressures have impacted my travel plans in the next 12 months] (Excludes "don't know") (5-point scale)
All respondents. (n=5,988)

IMPACT OF INTERNATIONAL EXCHANGE RATES ON DOMESTIC TRAVEL

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

Travellers from other Canadian regions remain relatively stable in their likelihood of travelling to Ontario for this reason, although they all shared a small increase compared to last month.

In addition, Western Canada and Manitoba each recorded an upward trend since the first month.

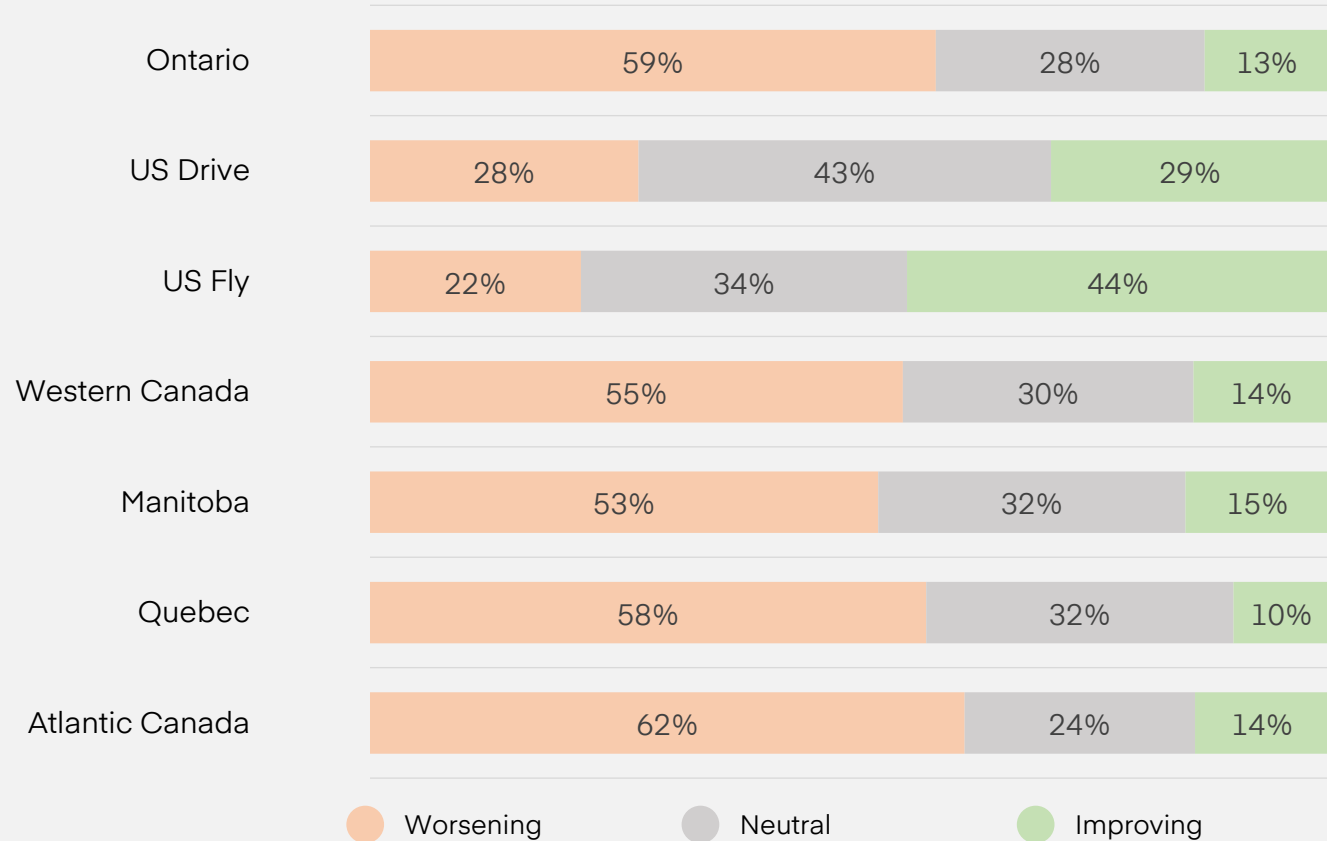


T4. How much do you agree or disagree with the following statements? [I am more likely to travel in Ontario in the next 12 months because of the unfavourable international exchange rates.] (Excludes "don't know") (5-point scale)
 All respondents from Canada. (n=4,390)

RELATIONSHIP EXPECTATION BETWEEN THE U.S. AND CANADA

Perceptions of the relationship between the U.S. and Canada vary across markets.

Canadian travellers are more likely to believe the relationship will worsen, while U.S. Fly travellers expect it to improve and U.S. Drive travellers remain mildly optimistic.



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=5,585)

RELATIONSHIP EXPECTATION BETWEEN THE U.S. AND CANADA

Following a notable decline in previous months, expectations for the U.S.–Canada relationship are returning toward earlier levels.

U.S. travellers continue to hold a more optimistic outlook on the relationship, while Canadian travellers remain considerably more pessimistic despite some recent improvement.



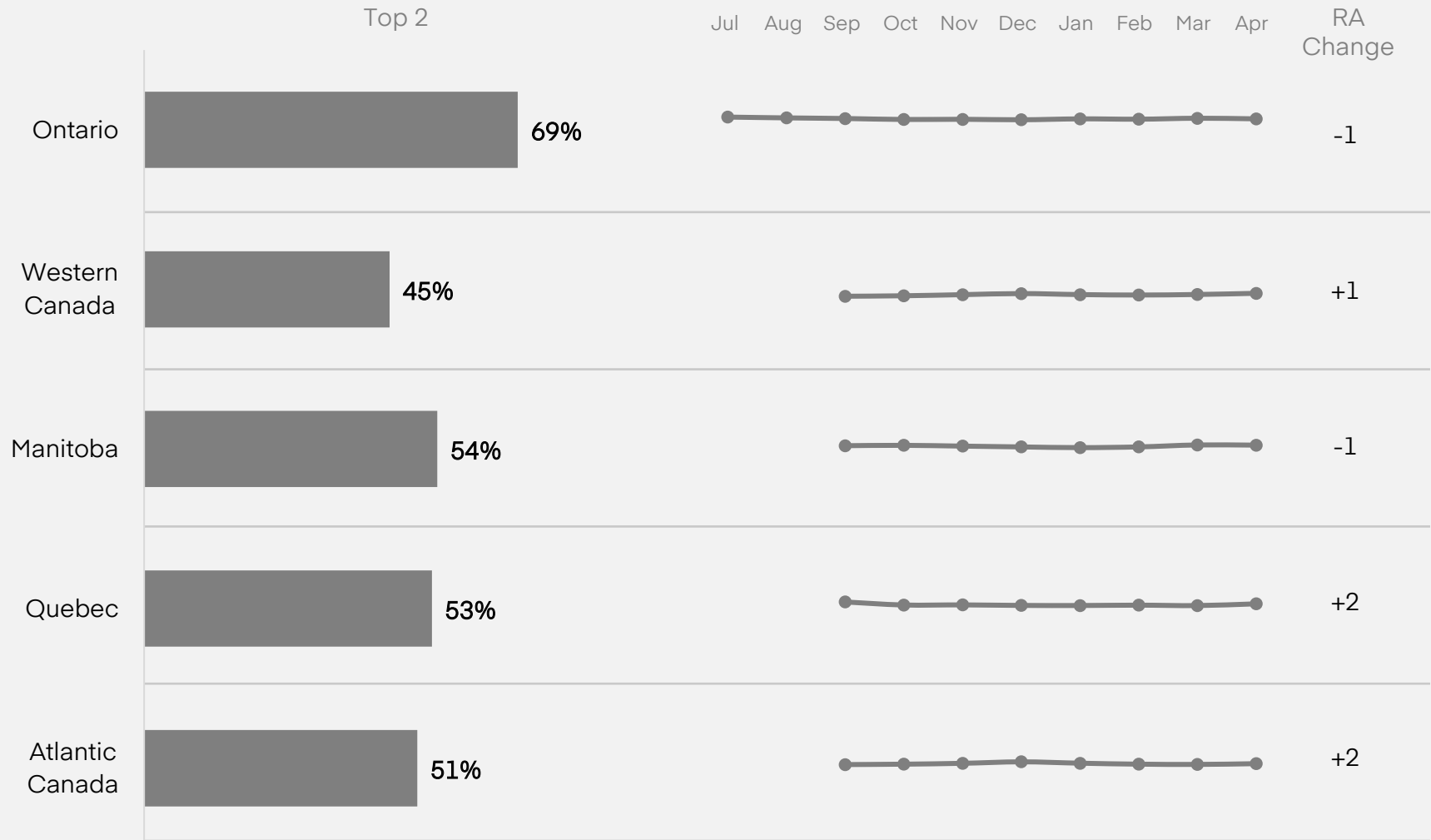
NRS (Net Relationship Score): Difference between 'Improving' and 'Worsening'. Positive scores indicate a more optimistic outlook, while negative scores indicate a more pessimistic outlook.

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=5,585)

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 stable compared to the previous month, with Manitoba travellers reporting the highest interest, closely followed by Quebec.



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.]

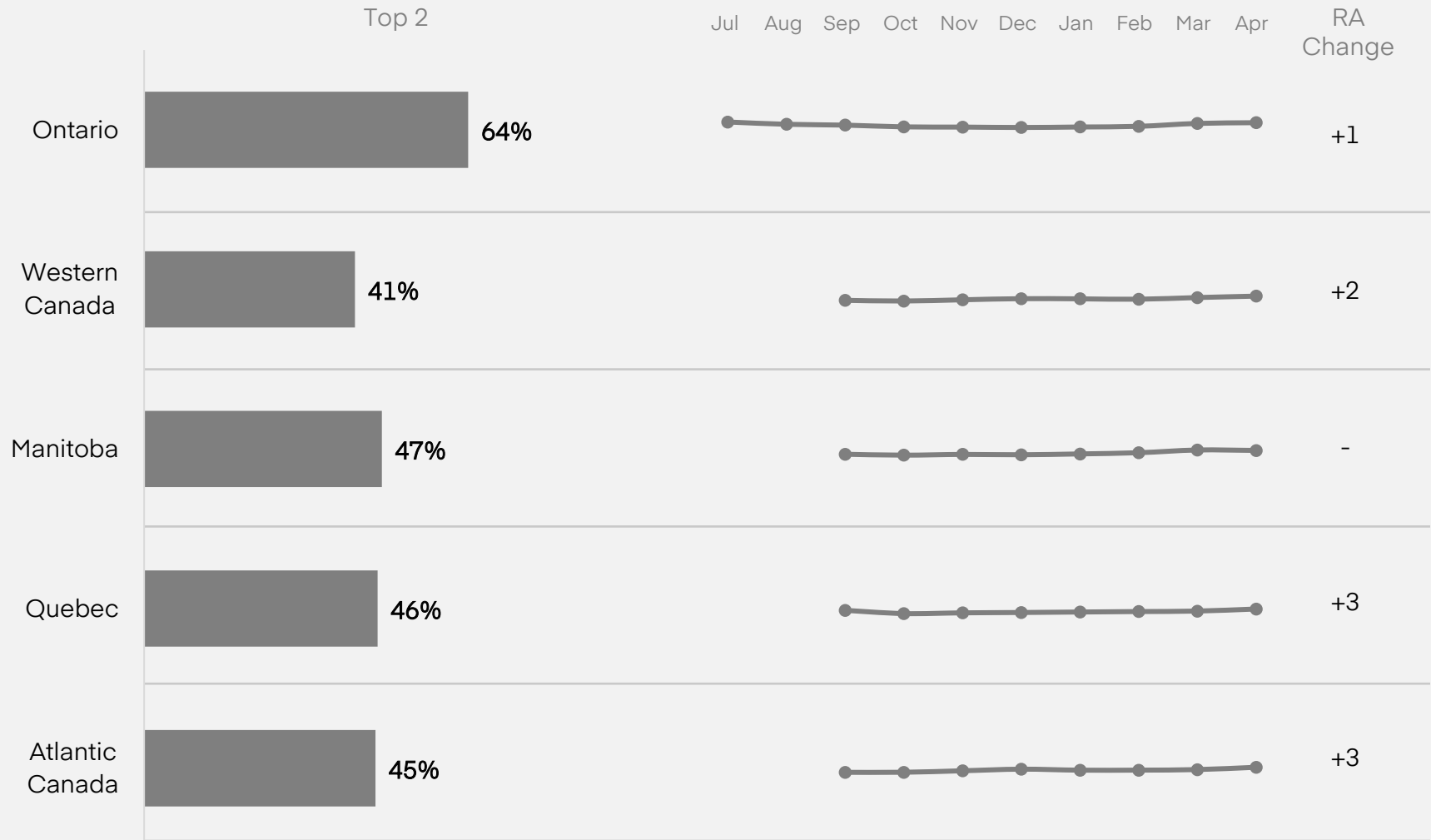
All respondents from Canada. (n=4,391)

ONTARIO TRAVEL LIKELIHOOD: IMPACT OF GLOBAL INSTABILITY

Ontario travellers remain the most likely to travel within the province due to global instability and conflict.

Sentiment is largely stable across the rest of the Canadian regions compared to the previous month, with the regions sharing an increase.

Quebec, Atlantic Canada, and Western Canada each saw an upward trend since the second month.

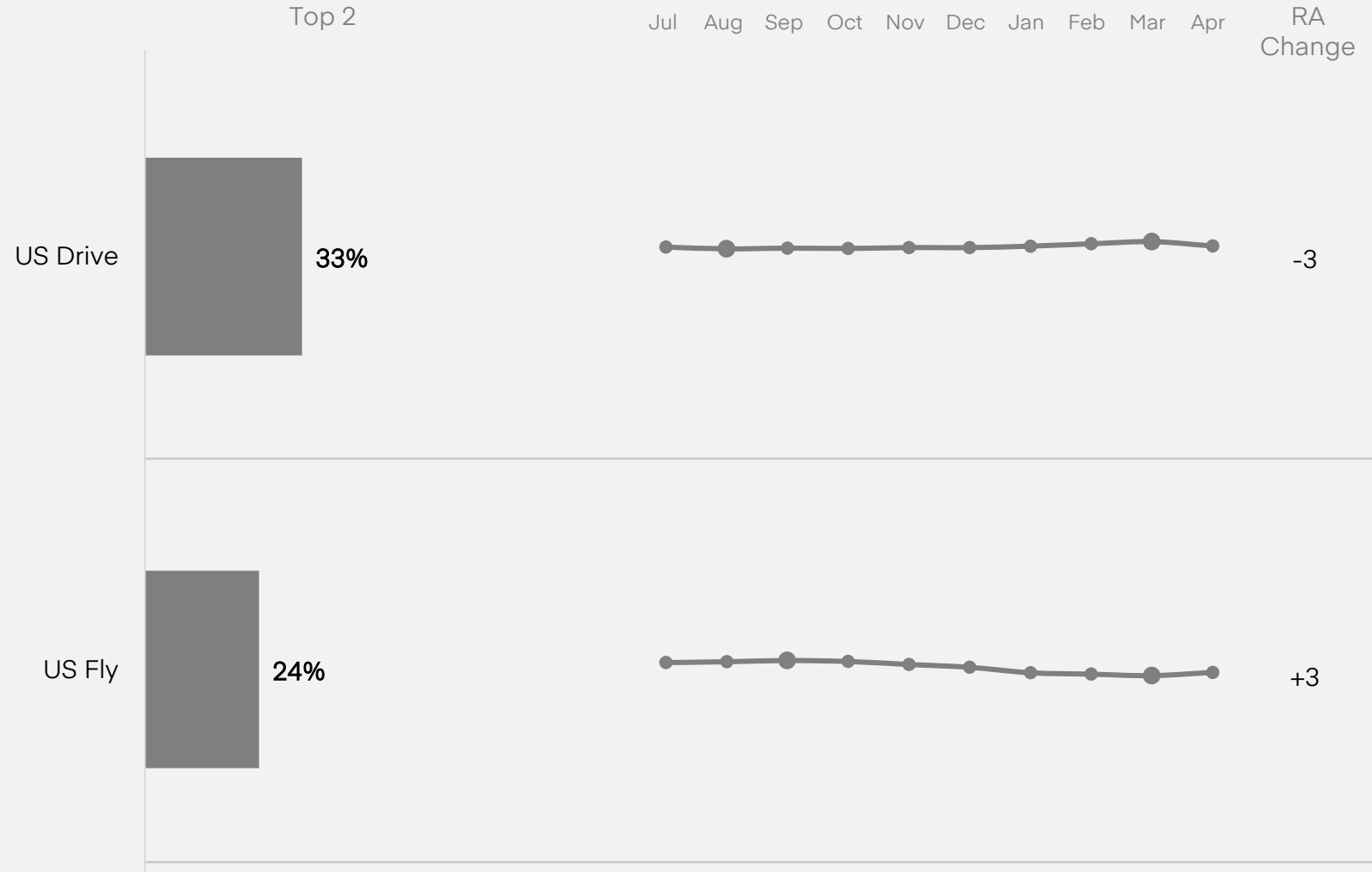


P3. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
 [I am more likely to travel within Ontario in the next 12 months due to concerns about global instability and conflicts]
 All respondents from Canada. (n=4,391)

BORDER CROSSING: ENTERING CANADA

Crossing the border into Canada remains a greater concern for U.S. Drive travellers than for U.S. Fly travellers.

U.S. Drive concern eased compared to last month, while U.S. Fly concern increased, capturing above its lowest point.



P1. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
[I am concerned about crossing the border to enter Canada]
All respondents from U.S. (n=1,480)

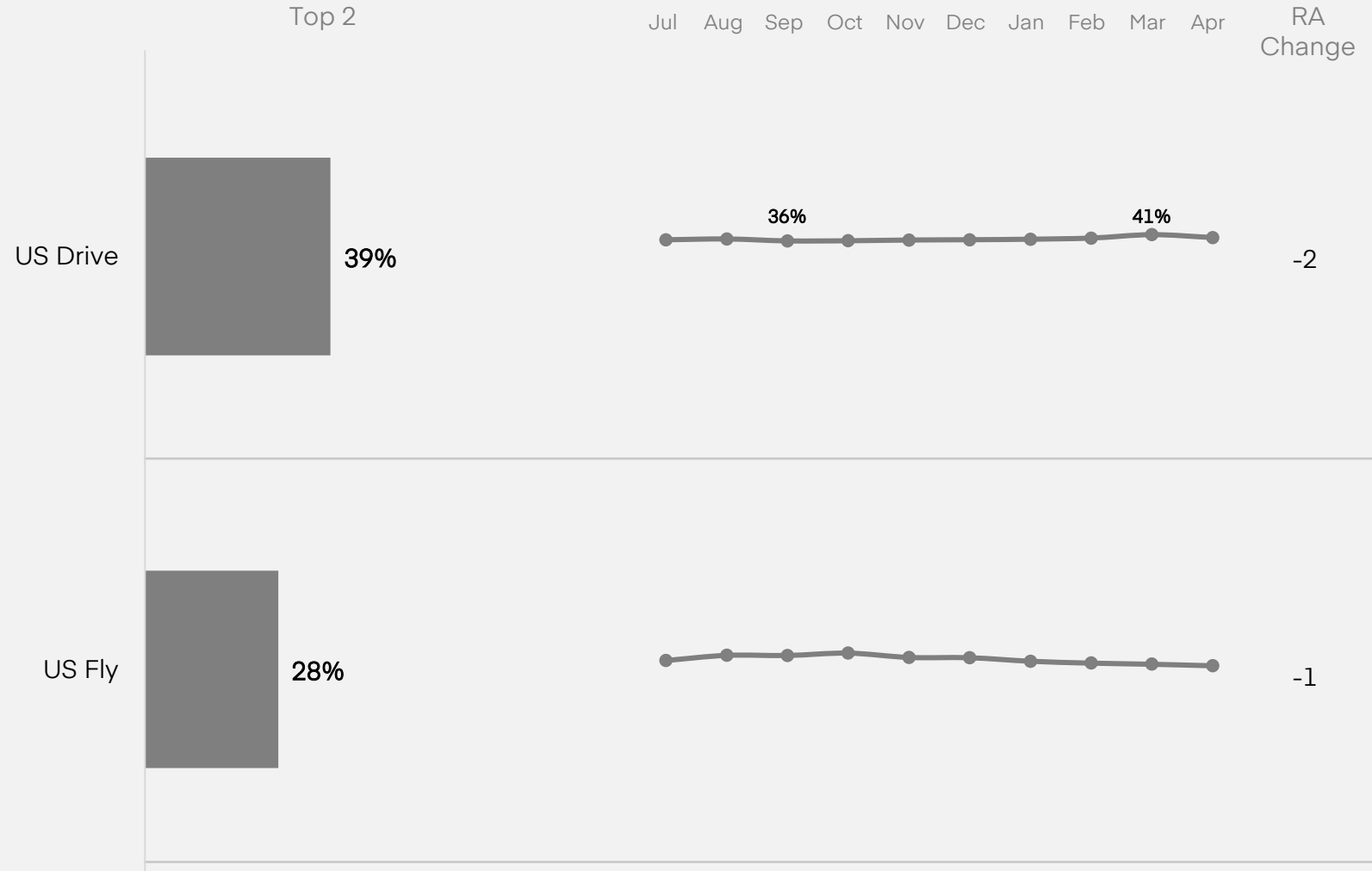
BORDER CROSSING: RETURNING TO THE US

U.S. travellers report moderate concern about crossing the border to return to the U.S., with concern higher among U.S. Drive travellers.

In addition, U.S. Fly travellers report this month as the lowest point, as declines have been prevalent since October 2025.

Both markets eased compared to last month, suggesting concern is softening.

Even though U.S. Fly travellers shared a decline, they are more concerned about returning to the U.S. than entering Canada.



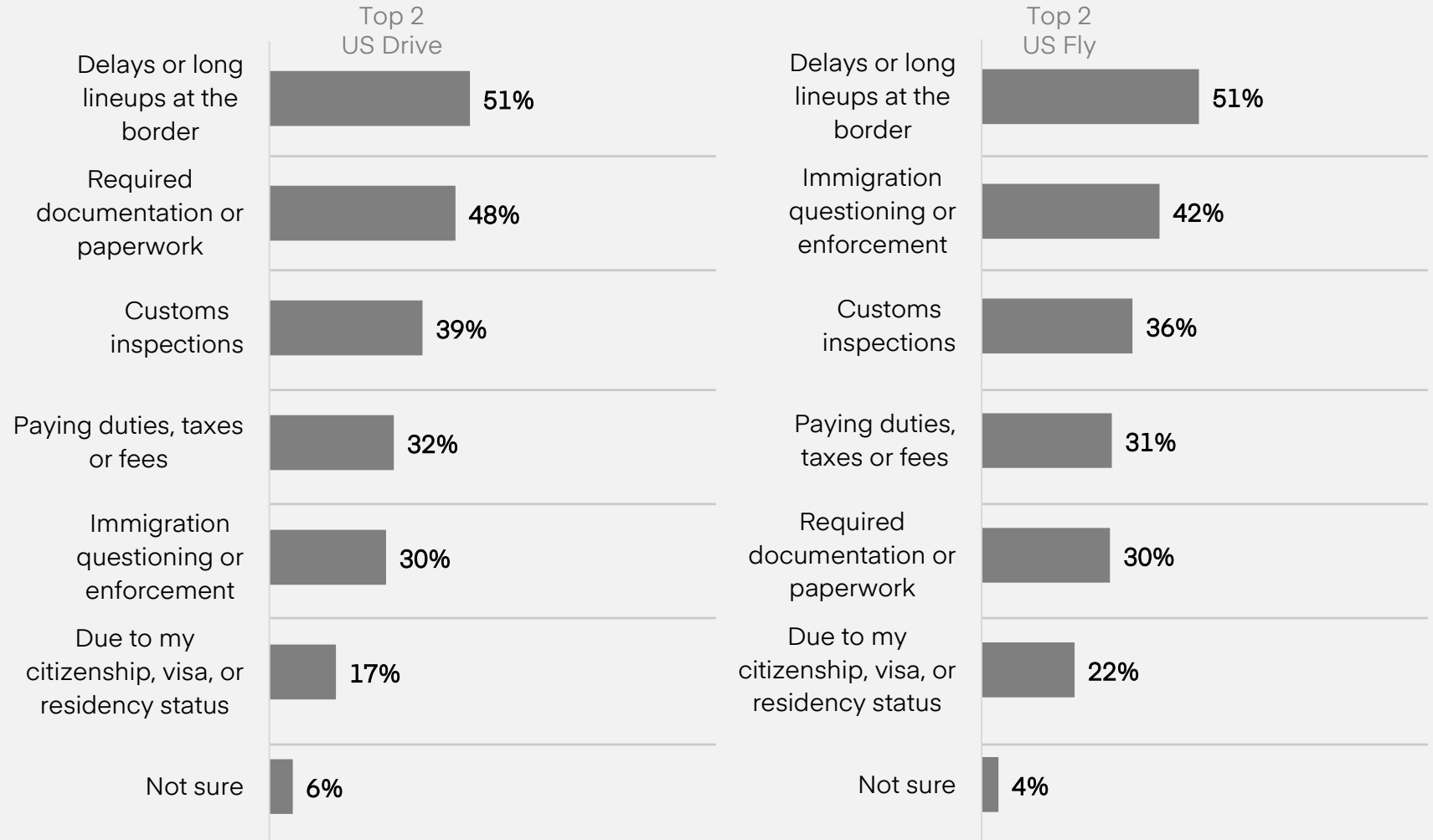
P1. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
 [I am concerned about crossing the border returning to the US from Canada]
 All respondents from U.S. (n=1,480)

BORDER CROSSING: CONCERNS RETURNING TO THE US

Delays and long lineups are the primary concern among U.S. travellers returning from Canada, shared equally by both U.S. Drive and U.S. Fly travellers.

Among U.S. Drive travellers, the second main concern is required documentation or paperwork, followed by customs inspections.

By contrast, U.S. Fly travellers are more likely to cite immigration questioning or enforcement as their second top concern, while customs inspections rose compared to last month.



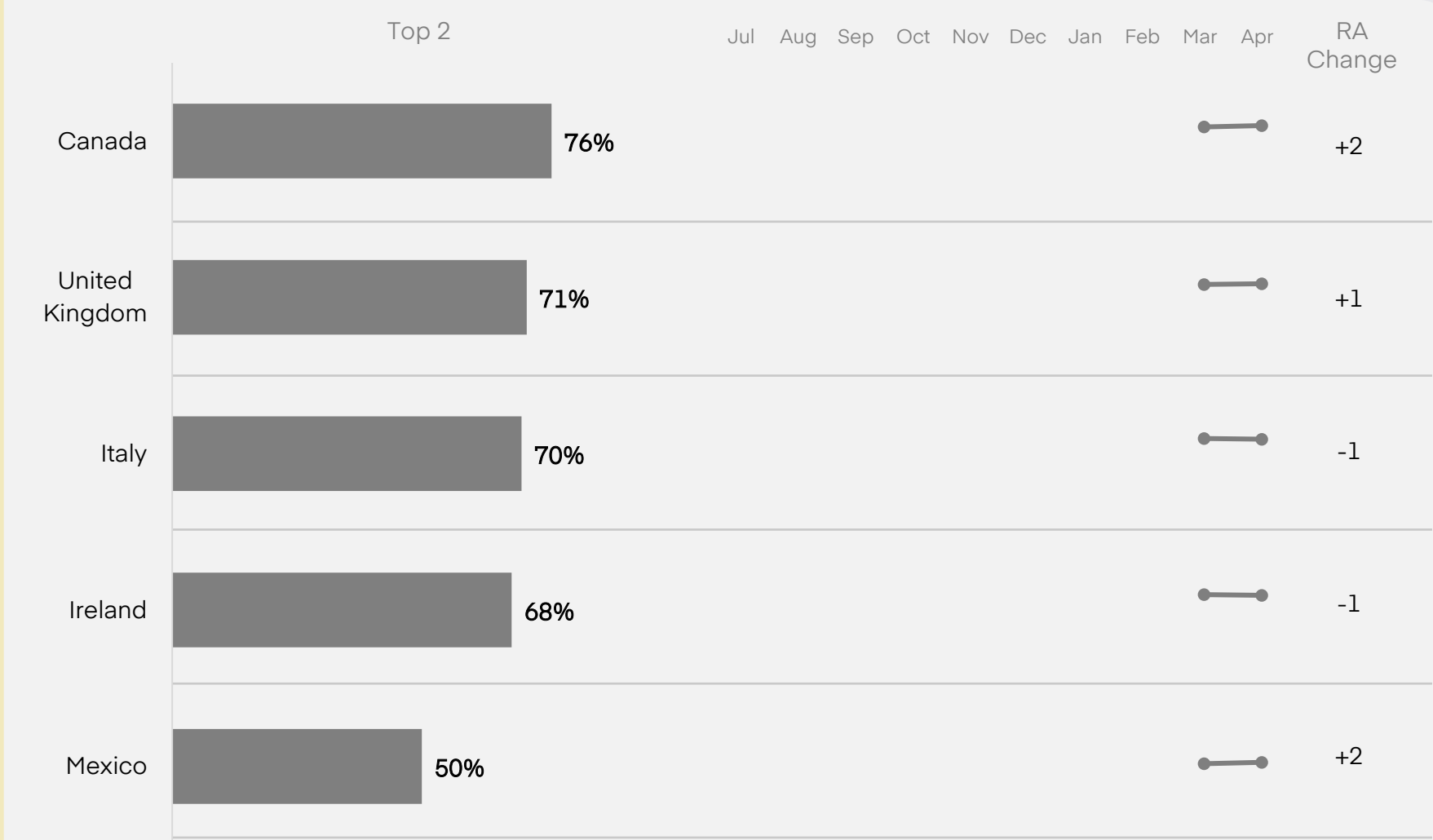
P1C. You mentioned that you are concerned about returning to the US from Canada. Which of the following, if any, describe your concerns? (Multi-select).

U.S. respondents who report concerns of border crossings. (n=311)

WELCOMING COUNTRIES TO US TRAVELLERS

Canada continues to rank as the most welcoming country among U.S. travellers, followed by the United Kingdom and Italy.

The United Kingdom showed an increase in rank this month, while Italy dropped. Mexico continues to be thought of the least welcoming country among U.S. travellers.



P4. For each of the following countries, how much do you agree or disagree with the following statement? (Excludes "don't know") (5-point scale)
 [This country is currently welcoming to US visitors.]
 All respondents from U.S. (n=405)



ENVIRONMENTAL CONSIDERATIONS IN TRAVEL

Environmental considerations continue to play a secondary but notable role in Ontario travel planning.

U.S. Fly travellers remain the most likely to report that wildfires have impacted their plans to travel to Ontario, followed by Manitoba, while Ontario and Quebec both saw significant increases this month.

Interest in sustainable tourism remains steady across most markets, with Canadian regions relatively stable. U.S. Fly travellers continue to lead in sustainability motivation, and U.S. travellers overall are more willing than Canadian travellers to pay more for a sustainable option if the experience is equivalent.

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Weather Conditions

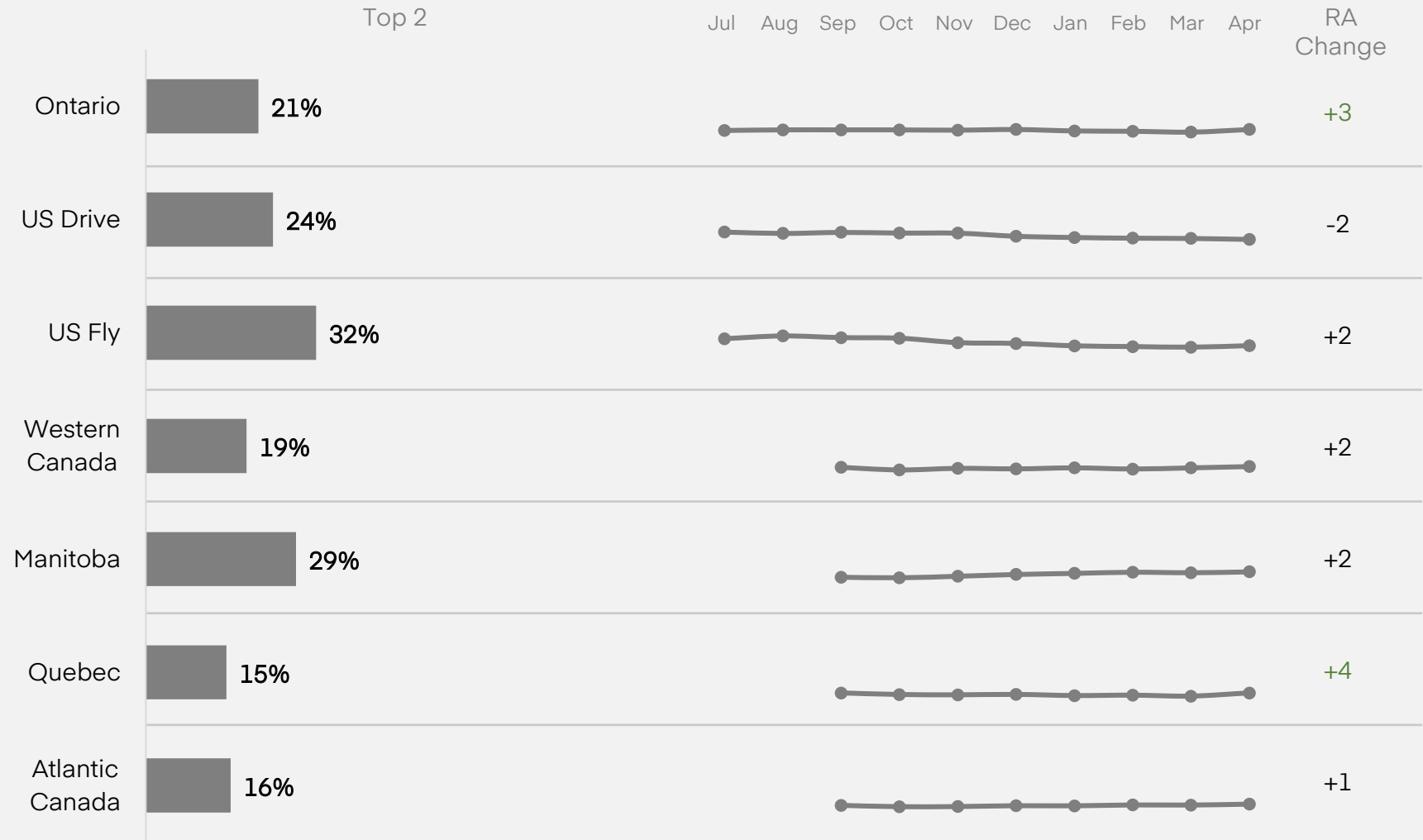
Sustainability

Impact on Travel Plans

WILDFIRES IMPACT ON ONTARIO TRAVEL

U.S. Fly travellers are the most likely to report that wildfires have impacted their plans to travel to Ontario, followed by Manitoba.

Ontario and Quebec both saw significant increases this month in concerns about wildfires impacting their Ontario travels.



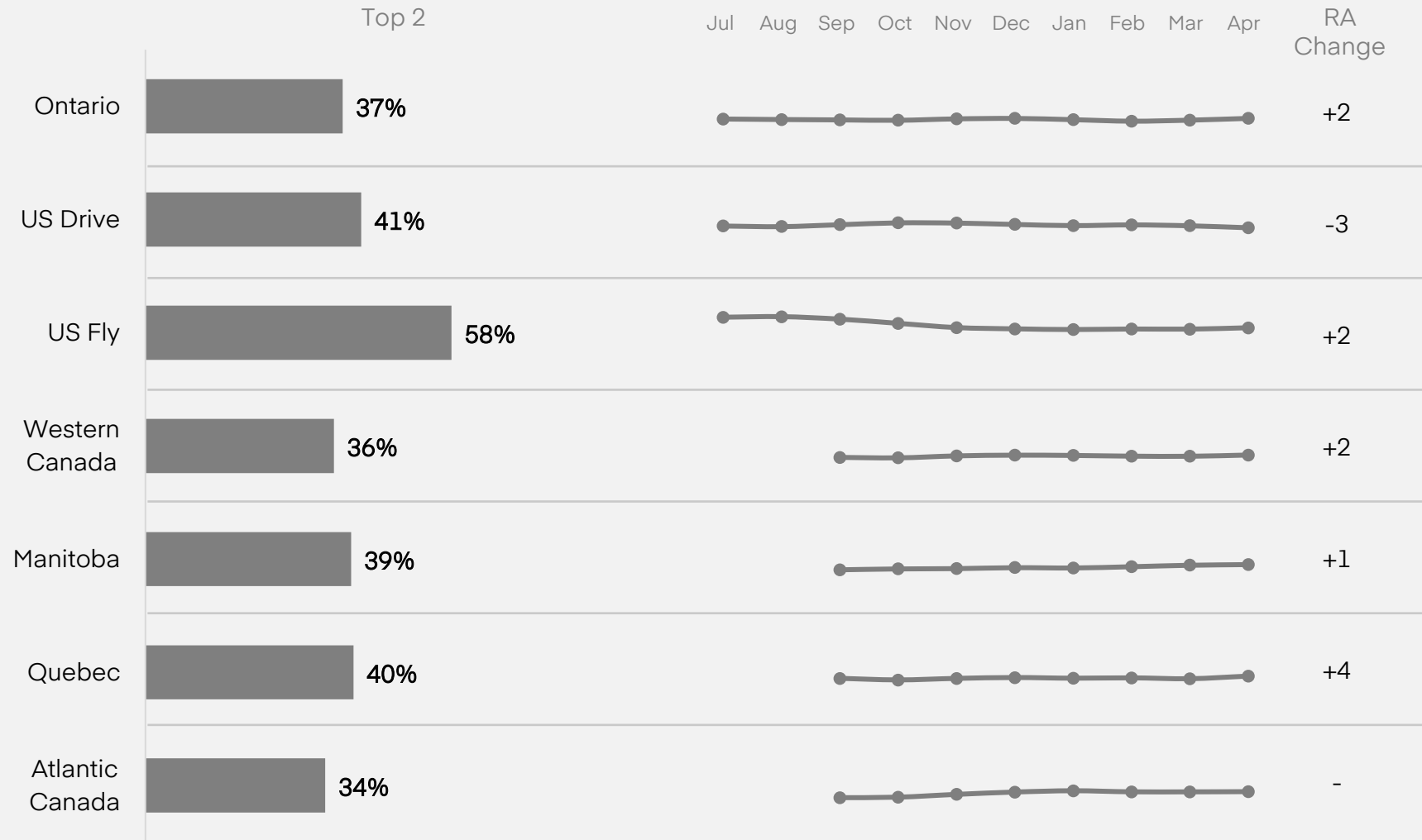
ST1. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
 [Canadian wildfires have impacted my travel plans in Ontario, Canada]
 All respondents. (n=5,850)

PRIORITIZING SUSTAINABLE TOURISM

Interest in sustainable tourism has remained relatively stable across most markets compared to the previous month.

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

Quebec saw the largest increase this month, while Manitoba travellers continue to show an interest on prioritizing sustainable tourism as an upward trend since its first month.



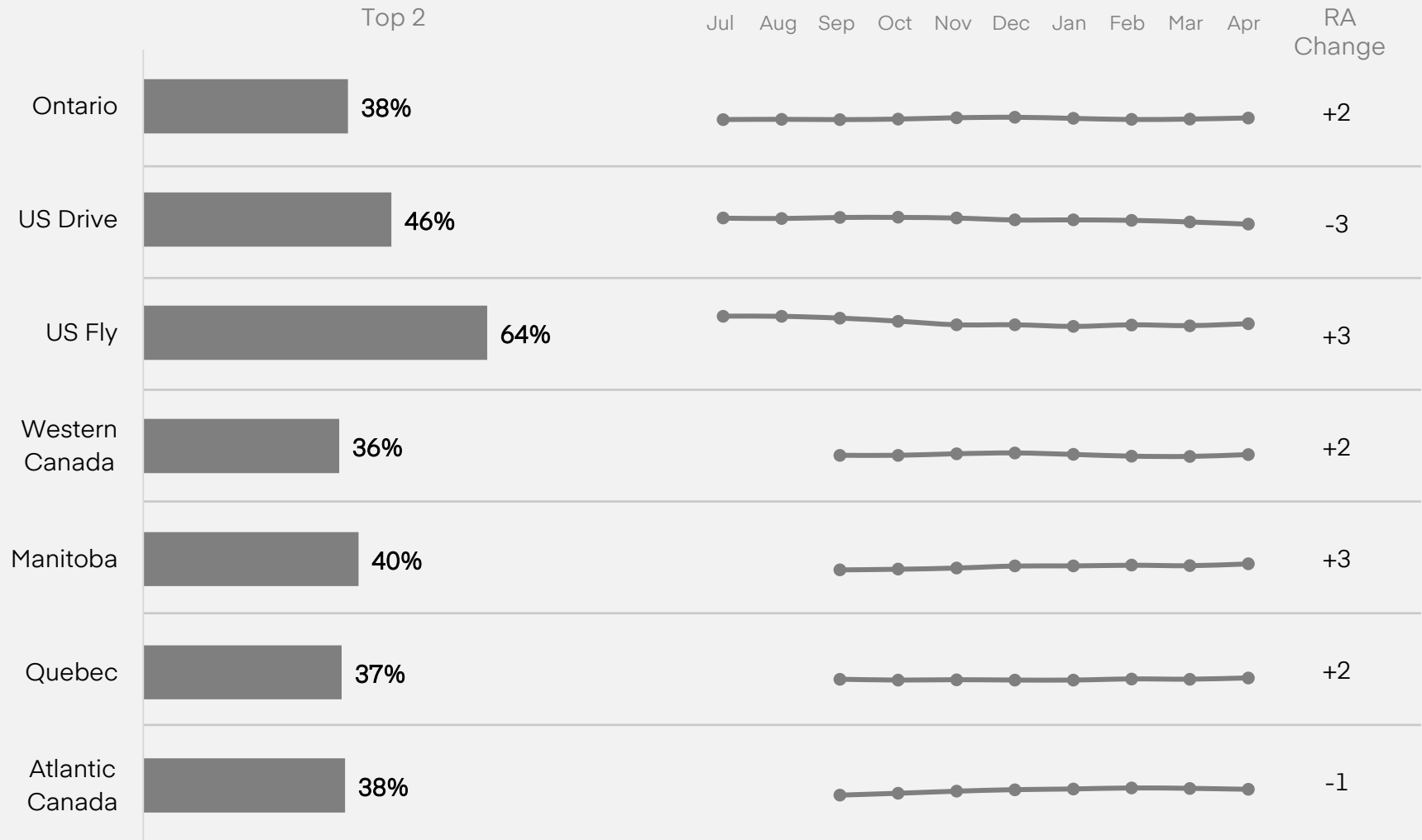
ST2. How much do you agree or disagree with the following statements? (Excludes "don't know") (5-point scale)
 [I choose travel destinations that prioritize sustainable tourism]
 All respondents. (n=5,762)

PAYING EXTRA FOR SUSTAINABLE TRAVEL

U.S. travellers are more likely than Canadian travellers to be willing to pay more for a sustainable travel option if the experience were equivalent, particularly U.S. Fly travellers.

Canadian regions have remained relatively stable compared to the previous month, with most seeing a slight increase.

Meanwhile, U.S. Drive travellers continues to decrease, U.S. Fly travellers report an increase this month.



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=5,762)

FIFA WORLD CUP 2026

Awareness that Toronto is a FIFA World Cup 2026 host city remains highest among Ontarians and has increased in several markets, particularly Quebec, while U.S. Drive travellers continue to report the lowest awareness levels.

Sentiment toward Toronto due to FIFA remains mixed: U.S. Fly travellers are the most likely to say the event motivates a visit, with about half reporting it as a motivator, while Canadian markets are more likely to say they would avoid Toronto because it is hosting, though avoidance has softened in Ontario and Western Canada.

Among GTA residents, interest in attending FIFA-related matches, fan zones, and attractions has increased compared to last month, rebounding after several months of softening as the event draws closer.

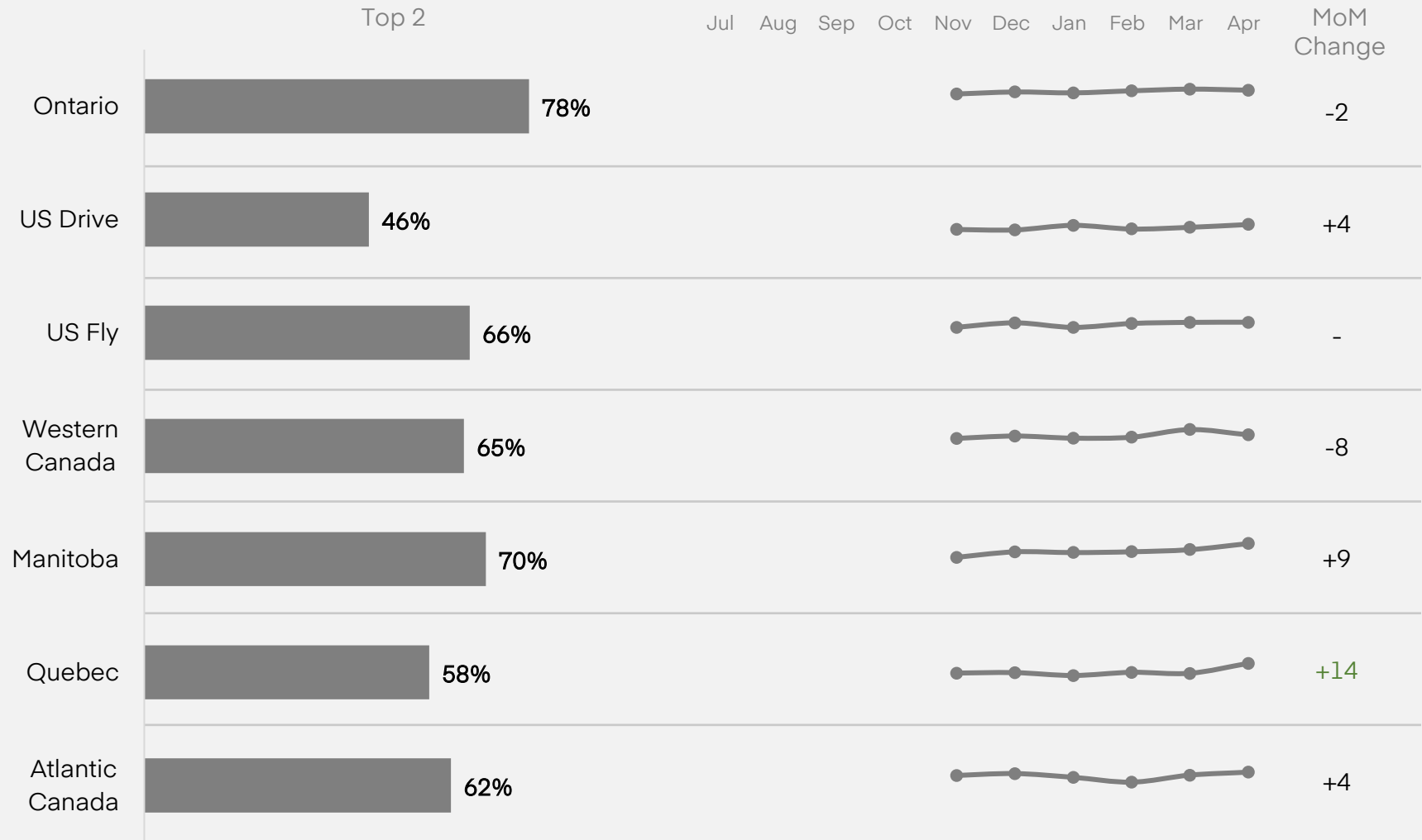
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FIFA 2026

AWARENESS OF TORONTO AS HOST CITY

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

Awareness has increased significantly in Quebec this month, while Western Canada eased after recent incline. U.S. Drive travellers continue to report the lowest awareness levels, while Quebec moved up notably from last month.

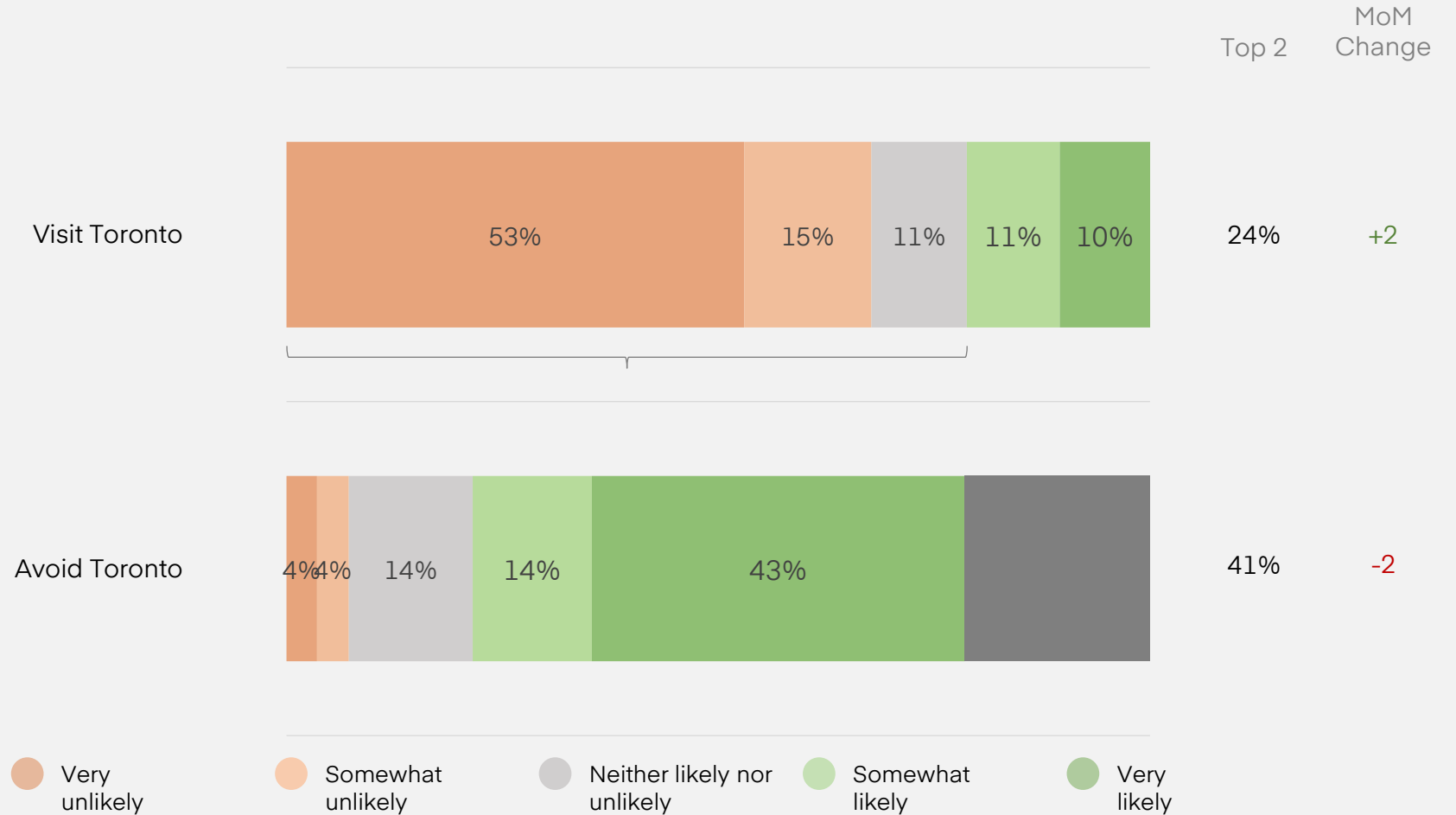


F11. Before today, how aware are you that Toronto is one of the official host cities for the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
All respondents. (n= 1,939)

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 half reporting this as a motivator.

Canadian markets remain the most likely to avoid Toronto because it is a host city for FIFA 2026.

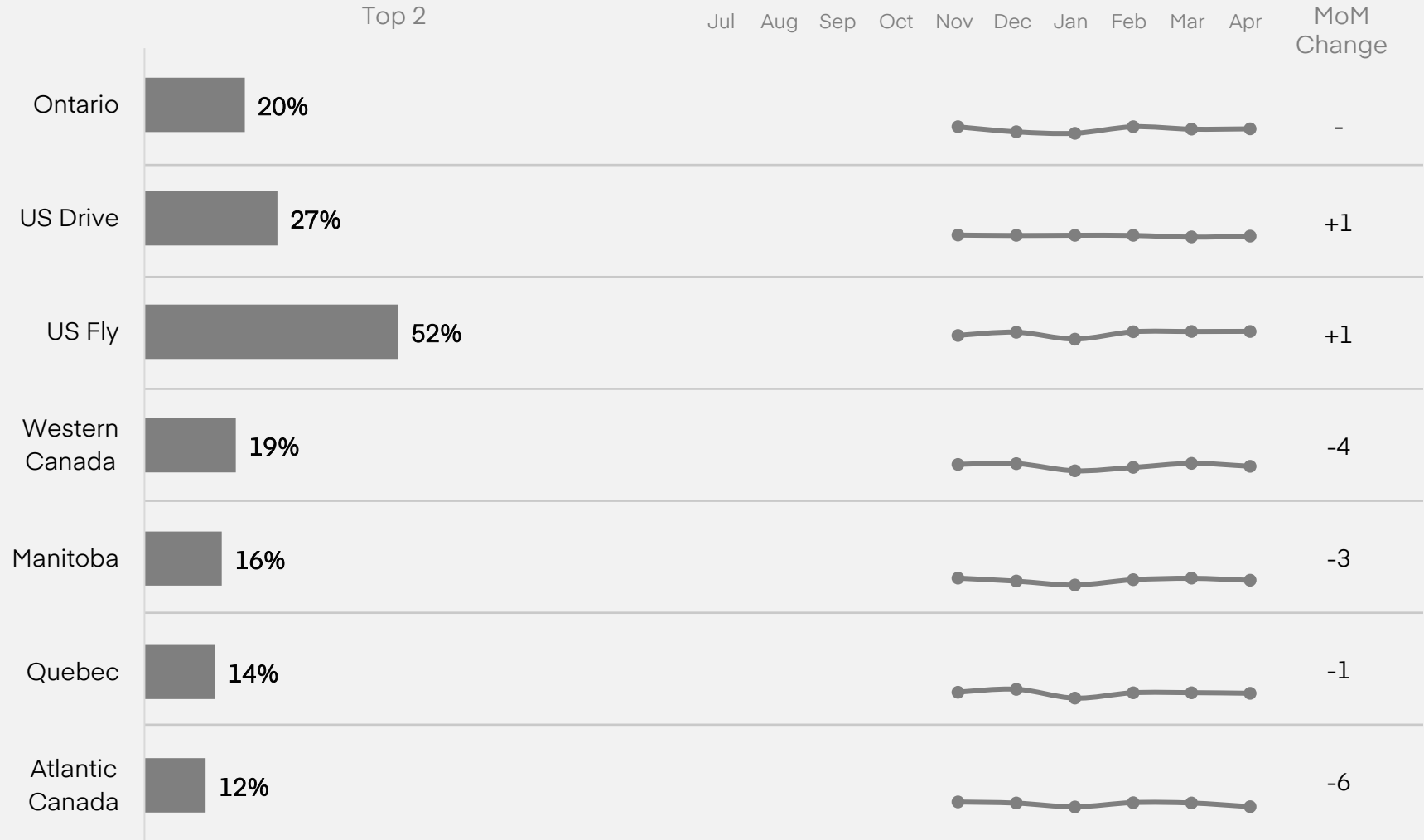


FI2. How likely are you to visit Toronto because it's hosting the FIFA World Cup 2026? (Excludes "don't know") (5-point scale) / FI3. How likely are you to avoid Toronto because it's hosting the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)
 Respondent who don't live in the GTA (n=1,756)

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 half reporting this as a motivator.

Interest in travelling due to FIFA 2026 has eased compared to last month across most Canadian markets, particularly in Atlantic Canada and Western Canada, while U.S. markets remain stable.



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

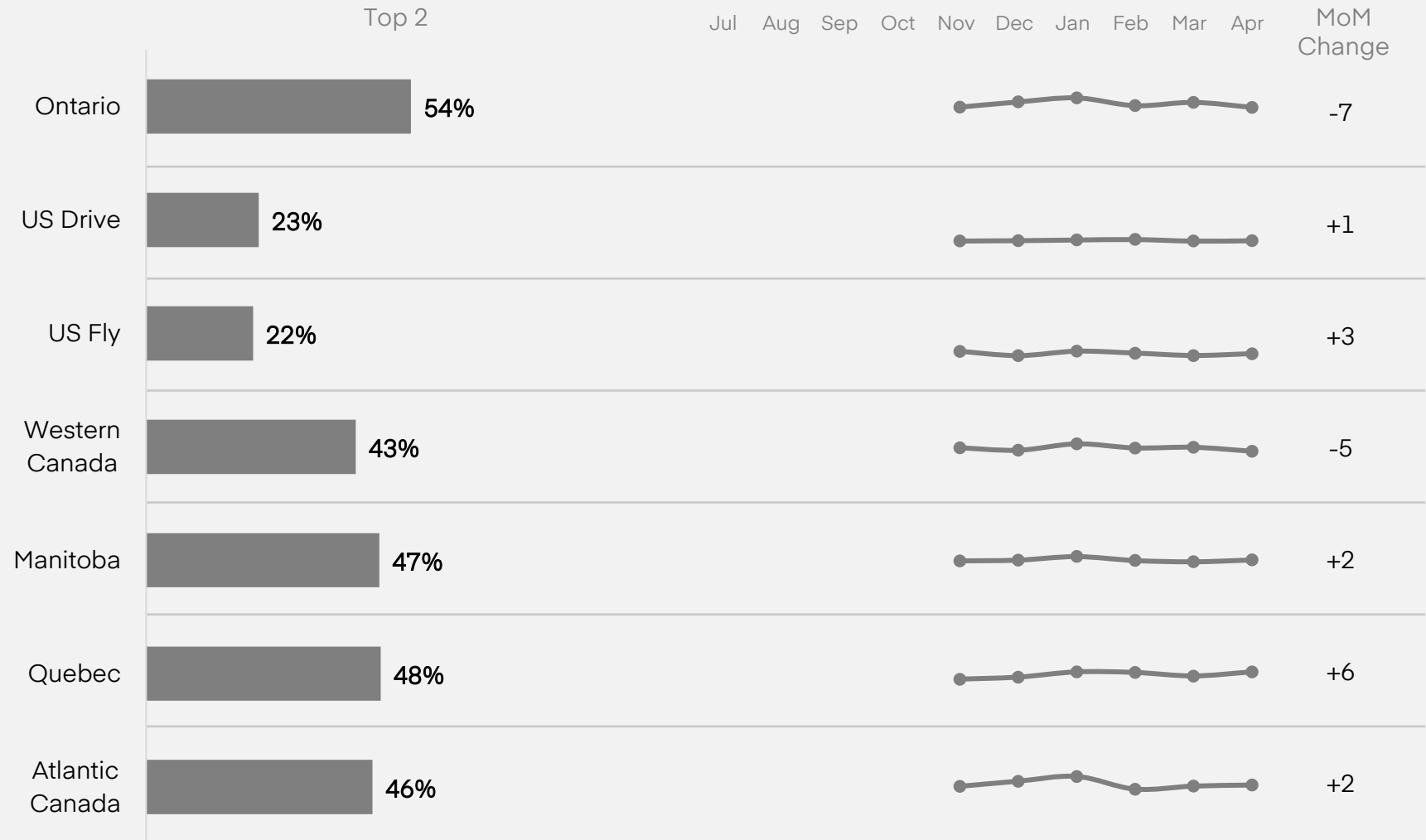
Respondent who don't live in the GTA (n=1,756)

AVOIDING TORONTO DUE TO FIFA WORLD CUP 2026

Canadian markets remain the most likely to avoid Toronto because it is a host city for FIFA 2026.

In contrast, only about one in five U.S. travellers say they would avoid Toronto because of FIFA 2026.

Avoidance softened in Ontario and Western Canada compared to last month, while Quebec saw a notable increase.

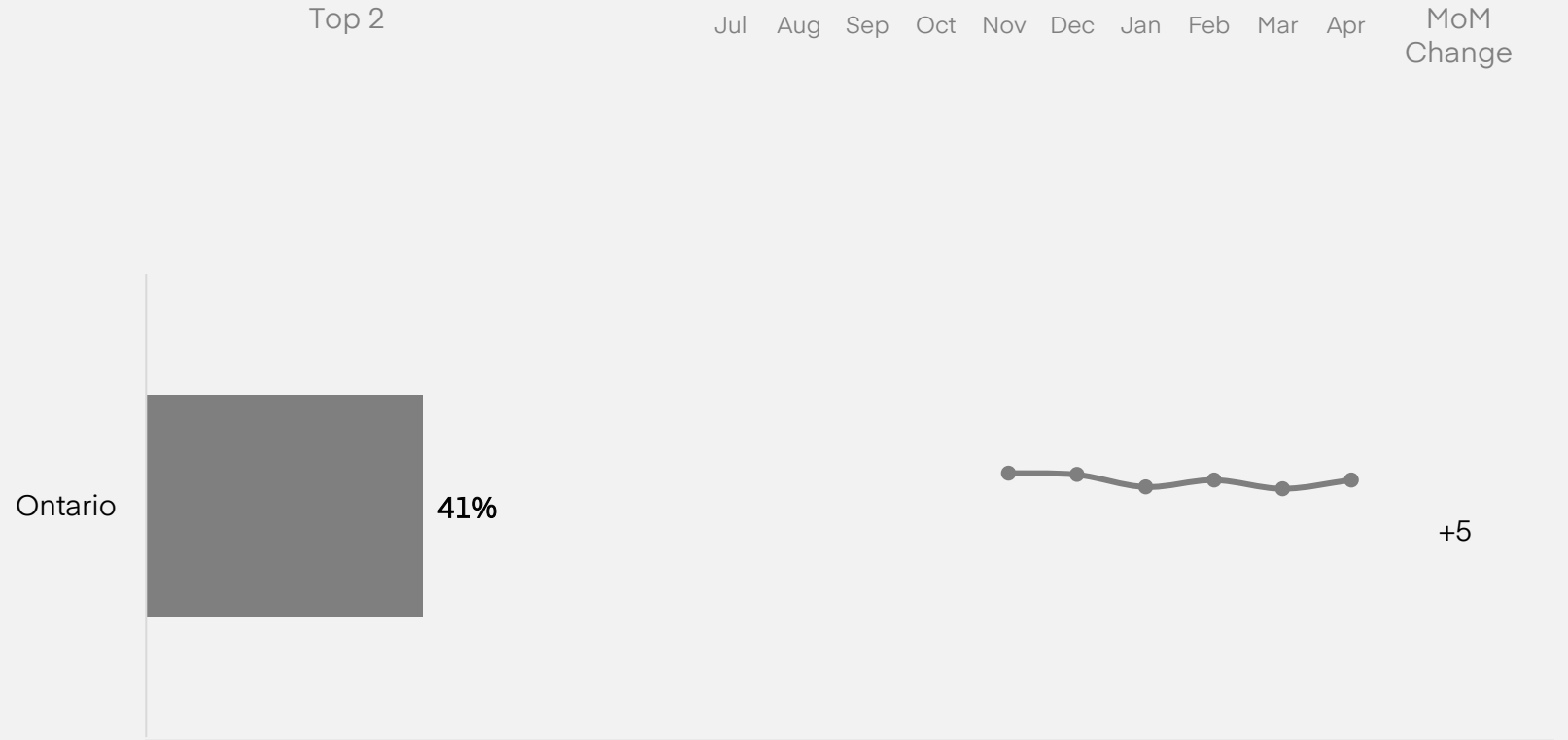


FI3. How likely are you to avoid Toronto because it's hosting the FIFA World Cup 2026? (Excludes "don't know") (5-point scale)

Respondent who don't live in the GTA (n=1,729)

VISITING FIFA HOST AREAS WITHIN TORONTO

Interest in Toronto's FIFA 2026 experience among GTA residents has increased compared to last month, including interest in attending matches and visiting related attractions.



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=203)