



CONTEXT IS EVERYTHING

ONTARIO CONSUMER SURVEY

Prepared for: Destination Ontario

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CONTEXT IS EVERYTHING

KEY OBJECTIVES

 Niagara Falls (RTO2)

Overview:

CRG worked collaboratively with Destination Ontario (DO) to conduct a survey among Ontario-resident leisure travellers. The primary goal of the study was to generate insights on Ontarians' favourite travel experiences and destinations, as well as gauge their travel intentions.

Objectives:

The objectives of this survey were to:

- Explore Ontarians' preferences, favourite travel activities, and emotional ties to local destinations, covering:
 - Favourite Ontario destinations, foods, and activities
 - Positive emotional connections
 - Seasonal travel preferences, with takeaways for summer and winter experiences
- Provide key provincial-level findings related to:
 - Intentions to travel within Ontario, other parts of Canada, and the US in the coming year.
 - Recent impacts on travel plans
 - Feelings of being welcomed when considering travel within Ontario, Canada, and the US
 - Barriers or deterrents when considering travel within Ontario, Canada, and the US



METHODOLOGY

 Niagara Falls (RTO2)

Methodology:

- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:

- Ontario resident
- 25 to 64 years old
- Have taken a leisure trip in the past 2 years or planning to take a leisure trip in the next 2 years
- Uses social media at least once a week
- Interested in certain tourist activities

Sample Size:

- n=1,600

Margin of Error:

- $\pm 2.5\%$

Weighting:

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

Fieldwork Date:

- March 6th – March 15th, 2025

Average Length of Interview:

- 12.2 minutes



METHODOLOGY

 Niagara Falls (RTO2)

Rounding:

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

Significance Testing:

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

EXECUTIVE SUMMARY



📍 Southampton (RT07)

Ontario travel offers diverse, accessible getaways that balance nature, culture, and local charm

Ontario residents see travel within their province as a diverse and accessible experience rooted in natural beauty, cultural depth, and a balance of relaxation and adventure. They value scenic landscapes, outdoor activities, and local charm, complemented by diverse cultural attractions and culinary experiences. Travel in Ontario feels familiar and low-stress, offering everything from peaceful retreats to vibrant city experiences. While many view Ontario as affordable, others note traffic and travel costs as barriers, suggesting perceptions of value can vary.

Ontarians' favourite destinations highlight the province's wide range of experiences. Niagara Region is praised for Niagara Falls, wineries, family traditions, and a mix of attractions for all ages. Toronto draws residents with its city energy, cultural events, food, nightlife, and nostalgic ties. Ottawa blends national history, museums, festivals, and scenic outdoor settings, making it a place for cultural connection. Muskoka offers natural serenity, family traditions, and small-town charm, with activities like kayaking, hiking, and skiing.

Ontarians favour locally-rooted travel that blends food, nature, shopping, and cultural activities for accessible, memorable getaways

Nearly three in five Ontario residents are highly interested in local cuisine, shopping, and nature experiences for upcoming pleasure trips. This is followed by strong interest in festivals and events, family-focused attractions, and cultural experiences. This highlights a strong preference for accessible, enjoyable, and locally-rooted travel that blends leisure with regional authenticity.

Food lovers seek out local restaurants and farmers' markets for fresh, distinctive flavours. Shoppers are drawn to outlet malls and artisan markets, valuing handcrafted goods and unique finds. Nature enthusiasts prioritize scenic hiking trails and peaceful parks, reflecting a deep connection to Ontario's natural beauty. Festival-goers particularly enjoy music festivals and holiday or seasonal celebrations. Families seek out zoos, aquariums, and amusement parks, while cultural travellers favour historic sites and museums or art galleries.

Culinary travel in Ontario is shaped by memorable, local and regional food experiences

When reflecting on past trips, residents frequently mention lakeside dining, visiting farmers' markets, attending food festivals, tasting Ontario wines at wineries, and picking fresh fruit at orchards or farms as top food experiences, highlighting how culinary moments tied to place and setting create lasting memories.

When asked about “must-visit” food destinations within the province, Ontario residents identified destinations that reflect the province’s regional diversity and culinary richness. Niagara is the most mentioned, known for its scenic wine tours, farm-to-table dining experiences, and vibrant culinary festivals. Toronto is celebrated for its diverse food scene, offering everything from international cuisine and cultural food festivals to Michelin-starred restaurants. Prince Edward County blends rural charm with artisanal cuisine, praised for its wineries, cheese trails, and seasonal fruit picking, providing visitors with a relaxed yet flavourful travel experience.

Ontarians seek seasonal getaways that blend nature, charm, and low-stress escapes year-round

Summer and fall are the most preferred seasons for Ontario getaways, offering a balance of outdoor adventure and scenic relaxation.

In spring and summer, residents enjoy visiting small towns, scenic drives, hiking, outdoor dining, camping, and swimming, with about two-fifths listing these as favourite warm-weather activities. Fall travel is centred around nature experiences, with over half of Ontarians favouring hiking, leaf-watching, and scenic drives to take in the province’s vibrant fall foliage. While winter is less preferred overall, it still holds appeal for many—around two in five residents seek cozy escapes, holiday markets, and Christmas villages, drawn to the seasonal charm and comfort of Ontario’s festive settings.

These seasonal preferences highlight a strong connection to Ontario’s natural beauty, small-town charm, and accessible, low-stress getaways that change meaningfully with each season, providing residents with memorable, locally-rooted experiences year-round.

Ontarians prefer local travel, while financial and political barriers deter US travel

Nearly nine in ten Ontario residents are likely to take an overnight pleasure trip within the province in the next year, a trend that has remained stable since Fall 2024. This strong preference for local travel reflects the importance of convenience, familiarity, and accessibility in shaping travel decisions. Compared to domestic travel, Ontarians are far less likely to travel internationally, particularly to the US. Only a quarter indicated they are likely to travel to the US and less than one-third feel welcome there, significantly lowering outbound travel intentions.

Several key barriers discourage Ontario residents from travelling outside the province, especially to the US. Financial concerns are a major factor, with the unfavourable exchange rate and overall cost of travel making U.S. trips less appealing. Additionally, socio-political tensions, including anti-Canadian sentiment and divisive political views, contribute to a perception of being unwelcome, further reducing interest in cross-border travel.

Ontarians remain welcoming to US visitors, reflecting Canadian hospitality despite cross-border tensions

Despite this, Ontarians maintain a respectful and balanced view of US visitors, with 44% expressing positive sentiments and 43% remaining neutral. This measured, hospitable outlook reflects Canadian values of politeness and openness, especially among older residents. Younger Ontarians are somewhat less positive but remain largely neutral, demonstrating that even amid tension, residents are courteous and welcoming. These trends highlight Ontario's potential for strong domestic tourism and suggest opportunities to further support local travel experiences that resonate with residents' values and preferences.



 Ottawa (RTO10)

PERCEPTIONS OF ONTARIO TRAVEL

According to Ontario residents, Ontario travel is rooted in **natural beauty, cultural richness, and accessible getaways that balance relaxation and adventure**. Residents value the province’s scenic landscapes, outdoor activities, and local charm, complemented by diverse cultural offerings and culinary experiences. Travel within Ontario feels familiar, low-stress, and rejuvenating, offering a mix of peaceful retreats and exciting attractions. Affordability matters, though views on cost vary—some see Ontario as budget-friendly, while others note traffic and expense as challenges.

Favourite destinations reflect Ontario’s diversity in experiences.

- **Niagara Region is cherished for its natural wonder**—Niagara Falls—as well as wineries, family traditions, and a wide range of activities suited to all ages.
- **Toronto draws Ontarians with its vibrant city energy**, offering concerts, festivals, food, nightlife, and cultural attractions, along with strong emotional ties and nostalgia.
- **Ottawa offers a blend of national history**, museums, festivals, scenic beauty, and culinary scenes like ByWard Market, making it a place of cultural connection and outdoor enjoyment.
- **Muskoka is beloved for its lakes, forests, and peaceful nature**, alongside deep family traditions. Residents appreciate its balance of tranquility and activities like kayaking, hiking, and skiing, as well as small-town charm in places like Huntsville and Bracebridge.



Natural Beauty & Outdoor Adventure

Ontario residents overwhelmingly associate Ontario with natural beauty. The prevalence of words like nature, lakes, scenery, wilderness, and wildlife reveals that the **outdoor environment is central to Ontario's identity as a travel destination.**

Ontario's natural environment is a defining feature of the travel experience. Residents are drawn to iconic water-based attractions like the Great Lakes and Niagara Falls, as well as the opportunity to engage in core outdoor activities such as hiking, camping, and wilderness exploration. These natural offerings are a key reason people choose to travel within the province.



Balance of Leisure & Excitement

Travel in Ontario evokes a strong sense of joy, excitement, and relaxation. Words like fun, relaxing, exciting, peaceful, and enjoyable suggest a **balanced travel experience where people find both rejuvenation and adventure.**

Ontario offers versatile travel experiences, ranging from calm retreats in nature to energetic festivals and attractions, appealing to a wide variety of interests and moods. The word refreshing suggests that many residents seek mental and emotional renewal, especially for urban travellers seeking a meaningful escape from daily life.



Easy, Local Getaways

Words like local, close, home, convenient, and easy show that **Ontario travel is perceived as comfortable and accessible.** This sense of proximity and ease makes travel low-stress and approachable.

Trips feel familiar, accessible, and easy to plan. The province is also seen as safe and friendly, contributing to a sense of being welcomed and secure, reinforcing Ontario's reputation as an accessible and inviting destination.

Q0. Think about all the memorable experiences you've had while travelling in Ontario. Consider your feelings, experiences, and what makes Ontario unique to you. What three words come to mind when you think about travelling in Ontario?

All respondents. n=1600



Diversity in People, Places, Experiences

Ontario is known for **its diverse cultural offerings and regional variety**. Words like diverse, culture, unique, variety, Toronto, and Niagara highlight Ontario's richness beyond nature.

Ontario's cultural identity is shaped by major cities like Toronto, as well as iconic sites such as Niagara Falls. Residents value the diverse range of experiences, from vibrant urban exploration to the charm of small towns, making Ontario a destination rich in both cultural depth and regional variety.



Perceptions on Cost

Cost is top of mind—words like affordable, cheap, expensive, and value show that travellers are price-conscious and have mixed views on Ontario's value for money.

Some view it as budget-friendly, particularly when local travel helps reduce costs. However, others find it to be expensive or traffic-heavy, highlighting cost and congestion as potential pain points that can impact the overall travel experience.



Local Flavours & Culinary Enjoyment

Though smaller in volume, **food and drink experiences are still memorable** and add richness to Ontario travel.

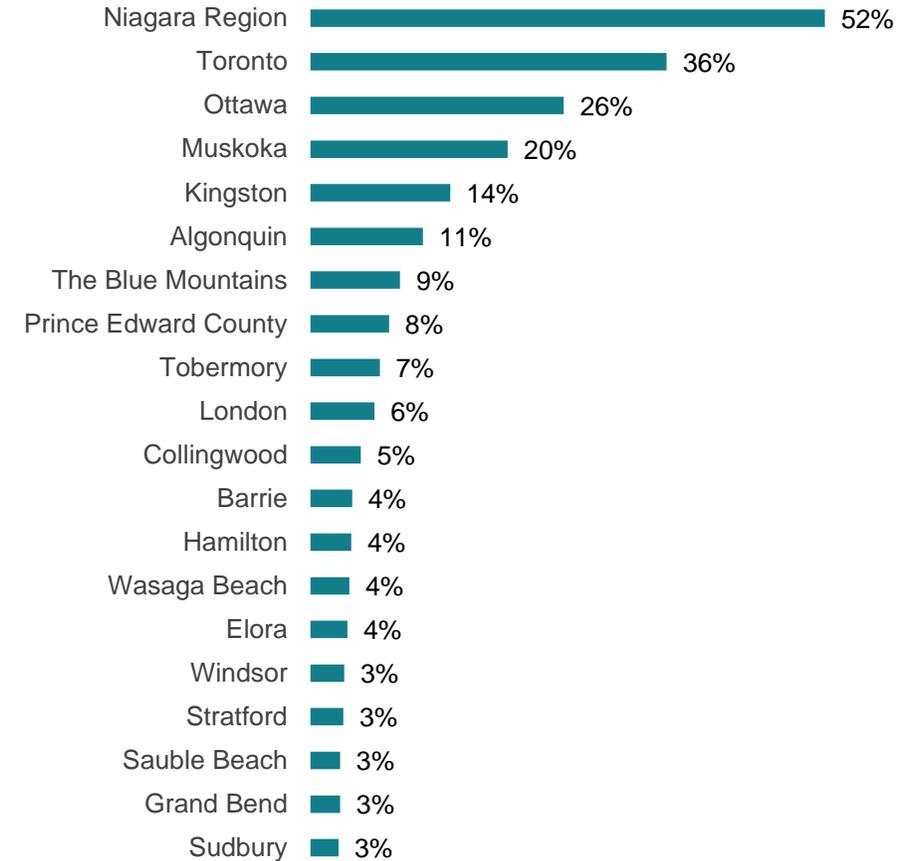
Local cuisine, wineries, and food markets play a valuable supporting role in enhancing Ontario's travel experiences. These culinary experiences are often region-specific, such as the Niagara wine region or Toronto's diverse food scene, and contribute to creating memorable, place-based connections for travellers.

Q0. Think about all the memorable experiences you've had while travelling in Ontario. Consider your feelings, experiences, and what makes Ontario unique to you. What three words come to mind when you think about travelling in Ontario?

All respondents. n=1600

FAVOURITE TRAVEL DESTINATIONS

Ontario residents favour well-known, scenic, and accessible destinations, with the **Niagara Region, Toronto, Ottawa, and Muskoka** emerging as the top favourites for short getaways.



Q1A. Thinking about all the memorable destinations in Ontario where you've taken a short getaway (one to three nights away from home), which ones were your favourite? Where are these destinations located? Please list up to five destinations, starting with your top favourite. Be as specific as possible (e.g., town/city or specific attraction) (Top 20 shown)

All respondents. n=1600

The Falls as a Natural Wonder

Niagara Falls is more than a scenic highlight; it is an awe-inspiring, emotionally significant natural wonder that anchors the entire experience. Ontarians describe it as “mesmerizing,” “spectacular,” and “magical,” emphasizing beauty, power, and uniqueness.

A Variety of Activities for All Ages

Ontarians are drawn to Niagara for its range of attractions, from waterparks, casinos, and wineries to museums, live shows, and outdoor activities. The region offers a balance of excitement and relaxation, making it ideal for families, couples, and friend groups.

Food, Wine, and Culinary Enjoyment

Food and wine play a central role in enhancing the overall experience. Ontarians highlight local wineries, fine dining, and casual culinary options as memorable parts of their trip, contributing to a sense of indulgence and pleasure.

Family Memories, Tradition, and Nostalgia

For many, Niagara represents shared family memories and nostalgic value. Some respondents mention childhood visits, family traditions, and the joy of seeing their children enjoy the destination, creating a strong emotional connection.

“*Niagara-on-the-Lake (NOTL) is located far enough away from where I live (Toronto) to make it a **welcomed get-away from the routine**. NOTL's peaceful setting amongst nature and wineries is very relaxing and provides opportunities for pleasant walks/hikes.*”

“*A very romantic but fun getaway. **From wine testing, to shopping to such beautiful sights**. Central to everything you wanted and more. I totally loved it and can't wait to do the trip again.*”

“*I absolutely love this place. Just love the water park and usually **come here many times because my kids enjoy a lot**. The food is amazing as well. The staff was very friendly and kind. The bowling alley and arcade added more fun to our visit .*”

Q1B. You mentioned that [Niagara Region] was your favourite destination in Ontario. What made this destination your favourite? Please describe what stood out to you—whether it was the scenery, activities, food, people, or something else.

n=389

Variety and Volume of Activities

Respondents consistently highlight that there is “always something to do” in Toronto. The city offers a diverse and dense mix of attractions, including concerts, sports events, shopping, festivals, museums, nightlife, and food experiences. The vast array of activities appeals to various interests, ages, and moods, making it versatile and engaging.

Food, Nightlife, and Culture

Food and nightlife emerge as key highlights, with respondents praising the variety of cuisines, restaurants, bars, and cultural attractions. The city is seen as a hub of vibrant energy, offering international cuisine, top-tier entertainment, and memorable dining and nightlife experiences.

Urban Energy and Big City Vibe Drive Excitement

Many respondents are drawn to Toronto’s “big city feel”, describing it as vibrant, fast-paced, and full of life. They enjoy city-specific experiences like CN Tower, Blue Jays games, and downtown exploration, and appreciate the energy and diversity that come with being in Canada’s largest city.

Nostalgia, Family, and Special Occasions

Toronto holds personal significance for many respondents. Some have family roots or childhood memories tied to the city; others recall special events like anniversaries, concerts, or time with friends and family. This emotional layer deepens the connection beyond activities alone.

“ *The **buzz around the city**, seeing celebrities out and about, sitting at restaurant patios for dinner or drinks and people watching, going to see movies that are not officially released yet and being treated to Q&A with cast and director afterwards.* ”

“ *I love the **different cultures and experiences that are available**. There are so many different types of scenery, like city, nature and waterfront. I love the different foods and in the end, there are a **lot of experiences** that were had in Toronto.* ”

“ *There's a **decent amount of things to do here**, and I live near it. Downtown Toronto is pretty fun to walk around, eat, go to museums. **There are lots of cool cities in the world but Toronto is up there.*** ”

Q1B. You mentioned that [Toronto] was your favourite destination in Ontario. What made this destination your favourite? Please describe what stood out to you—whether it was the scenery, activities, food, people, or something else.

n=189

Rich History, Culture, and National Identity

Many respondents are drawn to Ottawa's deep historical roots, cultural landmarks, and national significance. The city's museums, Parliament buildings, festivals, and art galleries make Ontarians feel connected to Canadian identity, with some highlighting how they learned about Canadian history during their visit.

Museums, Attractions, and Festivals

Ottawa is praised for its world-class museums, engaging cultural exhibits, and year-round festivals, such as Winterlude and the Tulip Festival. Ontarians value the diverse, educational, and entertaining attractions, which appeal to both families and solo travellers.

Scenic Beauty and Outdoor Activities

Ottawa's natural beauty—including the Rideau Canal, parks, and walking trails—stands out to Ontarians. The city offers accessible outdoor activities like biking, hiking, skating, and boating, enhancing the experience and providing serene, picturesque moments.

Culinary Scene and Market Vibes

Respondents highlight Ottawa's diverse food scene, from local markets like ByWard Market to unique restaurants and Ottawa-style shawarma. Food is often mentioned alongside people and atmosphere, showing how culinary experiences enhance social and cultural engagement.

“ The **incredible cultural attractions** (museums, art galleries, Parliament, etc.), convenient public transit system, and delicious food (I really enjoyed Ottawa style shawarma!) ”

“ Ottawa has a plethora of interesting restaurants you can visit. There is also an eclectic Market area, with **many interesting shops and events throughout the area.** ”

“ Lots of different things to do. **Large focus on Canada and what being a Canadian is about.** Comfortable size, nice people. ”

Q1B. You mentioned that [Ottawa] was your favourite destination in Ontario. What made this destination your favourite? Please describe what stood out to you—whether it was the scenery, activities, food, people, or something else.

n=97

Scenery and Natural Beauty

Almost every respondent mentioned “scenery” or “nature”, highlighting that Muskoka’s lakes, forests, wildlife, and clean air form the core of its appeal. Whether it's kayaking on quiet lakes, enjoying fall foliage, or simply taking in the peaceful surroundings, Muskoka is valued as a place to reconnect with the outdoors.

Deep Family Traditions and Personal Connections

For many, Muskoka is tied to family history and personal rituals, such as renting the same cottage annually, childhood visits, or hosting family gatherings. These emotional ties reinforce Muskoka as a place of belonging, continuity, and shared joy.

Blend of Peacefulness and Activity Options

Muskoka offers the freedom to relax or be active, with respondents enjoying quiet escapes, cozy accommodations, and adventurous activities like hiking, canoeing, skiing, ice fishing, and boating. This balance of tranquility and engagement makes it ideal for varied travel styles.

Small Town Charm and Friendly Atmosphere

Ontarians appreciate Muskoka’s inviting towns, local shops, and warm community feel. Places like Huntsville and Bracebridge are described as quaint, charming, and welcoming, offering restaurants, markets, and events that complement the natural surroundings.

“ *Always have a fantastic time when we rent a cottage in that area. **It’s great lakes to kayak in. Wonderful wooded areas.** And can even see some fantastic wildlife (from a distance)!* ”

“ ***Lots of family activities in both winter and summer.** We discovered our love of cross country skiing here, and always enjoy the night time skate trail.* ”

“ *The people, the beautiful scenery, the stores and the restaurants and shops were all **very inviting and interesting** I had a great stay there* ”

Q1B. You mentioned that [Muskoka] was your favourite destination in Ontario. What made this destination your favourite? Please describe what stood out to you—whether it was the scenery, activities, food, people, or something else.



FAVOURITE ACTIVITIES AND FOOD EXPERIENCES

Nearly three in five Ontario residents are highly interested in **local cuisine, shopping, and nature experiences** for upcoming pleasure trips. These activities reflect a desire for accessible, enjoyable, and locally-rooted travel.

- Food lovers prioritize **dining at local restaurants and exploring farmers' markets** for fresh, regional flavours.
- Shoppers enjoy browsing **outlet malls and artisan markets**, seeking handcrafted goods and unique finds.
- Nature enthusiasts prefer **scenic hiking trails and serene parks**, emphasizing a connection to Ontario's natural beauty.

When reflecting on past trips, residents highlight **dining at lakeside restaurants and visiting farmers' markets** as top food experiences, showing that culinary moments tied to place and setting create lasting memories.

Ontario's top food destinations include:

- **Niagara:** The most mentioned, known for wine tours, farm-to-table dining, fruit picking, and culinary festivals.
- **Toronto:** Celebrated for its diverse food scene, offering everything from international cuisine to Michelin-starred restaurants and cultural food festivals.
- **Prince Edward County:** Praised for wineries, cheese trails, and seasonal fruit picking, blending rural charm with artisanal cuisine.

Together, these destinations offer rich, place-based culinary experiences that enhance Ontario travel.

ACTIVITY PARTICIPATION

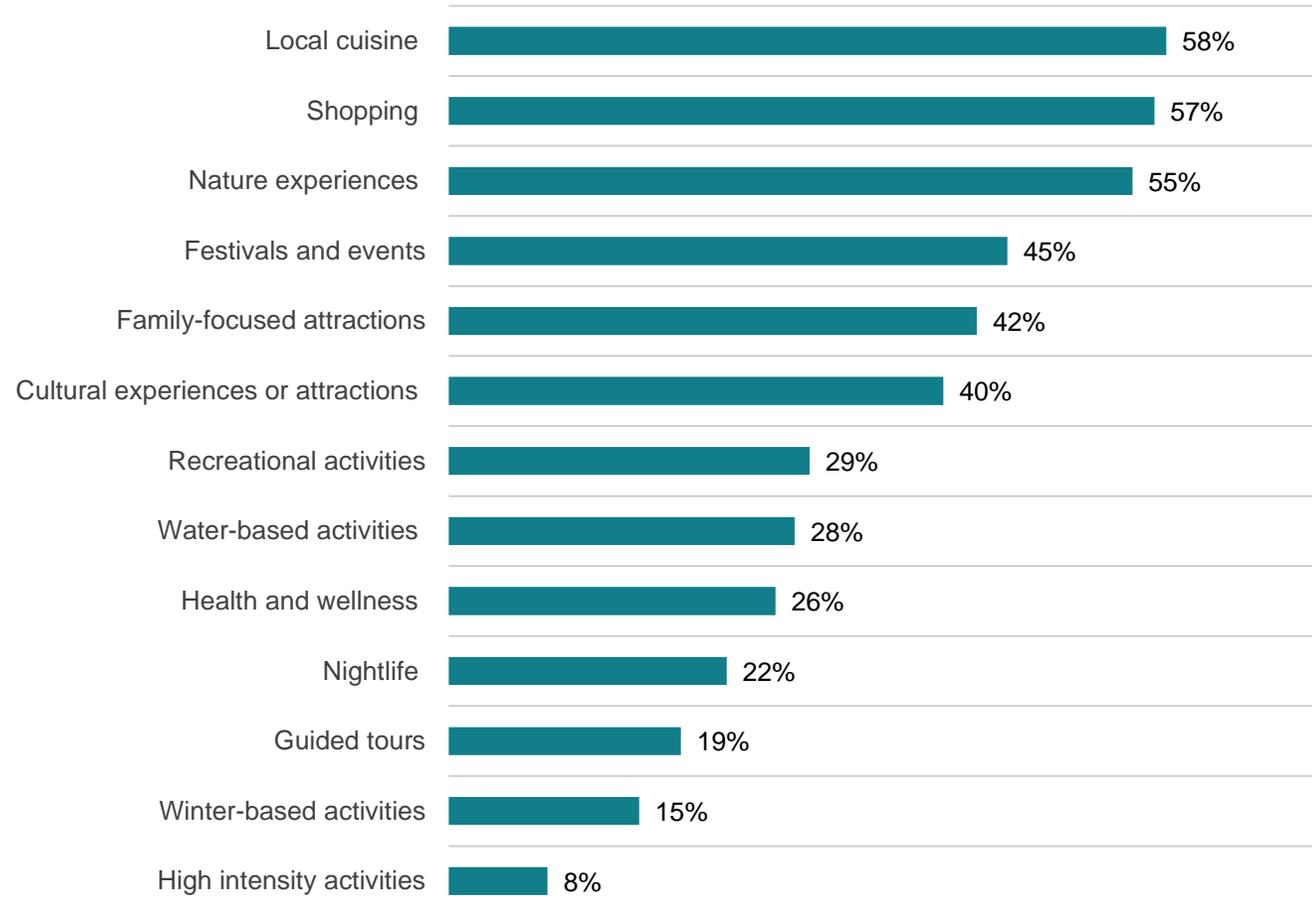
Close to three in five Ontario residents have high consideration for local cuisine, shopping, and nature experiences for their upcoming pleasure trips.

Younger individuals aged 30 to 44 are significantly more likely to consider family-focused attractions, health and wellness trips, and high-intensity activities. This suggests they prioritize keeping the family engaged and maintaining their health.

Women show increased interest in local cuisine and shopping. Meanwhile, men are more likely to do recreational and high-intensity activities.

BIPOC residents have a higher preference for guided tours, winter-based activities and high-intensity activities.

Travel Activities in Ontario



SC11. Are you considering any of these activities for any of your upcoming pleasure trips in Ontario in the next year? (Multi-select)
All Respondents. n= 1600

FAVOURITE ACTIVITIES

Travellers drawn to local cuisine particularly enjoy dining at neighborhood restaurants and exploring farmers' markets for fresh, regional flavours.

For those who love shopping while travelling, browsing outlet malls and discovering handmade goods at artisan markets are among their top activities.

Meanwhile, nature enthusiasts often seek out scenic hiking trails and serene parks to fully immerse themselves in the outdoors during their trips.

	Activity	%
	Local cuisine	58%
	Dining at local restaurants	37%
	Visiting farmers' markets	24%
	Food festivals	19%
	Wine or brewery tours	19%
	Shopping	57%
	Outlet malls or retail centers	23%
	Local artisan or craft markets	16%
	Antique or vintage shopping	13%
	Souvenir and specialty shops	12%
	Nature Experiences	55%
	Hiking or walking trails	33%
	Visiting national/provincial parks	27%
	Visiting beaches	24%
	Camping	20%
	Wildlife watching	13%

	Activity	%
	Festivals and Events	45%
	Music festivals	15%
	Holiday or seasonal celebrations	12%
	Cultural or heritage festivals	11%
	Sporting events	9%
	Family-Focused Attractions	42%
	Zoos or aquariums	16%
	Amusement or theme parks	15%
	Interactive museums/science	11%
	Farm-based attractions	9%
	Cultural Experiences or Attractions	40%
	Historic sites or heritage villages	16%
	Museums or art galleries	15%
	Performance (play, theatre, dance)	11%
	Indigenous cultural experiences	5%

Q2. Thinking about all the memorable trips you've had within Ontario, what were your favourite leisure activities that you did?
All Respondents. n= 1600

FAVOURITE ACTIVITIES – CONTINUED

Activity	%
 Recreational Activities	29%
Golfing	7%
Cycling (road or leisure biking)	6%
Fishing	5%
Pickleball or tennis	2%
Disc golf	<1%
 Water-based Activities	28%
Swimming	13%
Canoeing or kayaking	11%
Boating	8%
Stand-up paddleboarding	4%
Jet skiing	2%
Scuba diving/snorkeling	1%

Activity	%
 Health and Wellness	26%
Spa treatments or massages	10%
Hot springs or saunas	6%
Wellness resorts or retreats	6%
Yoga or meditation retreats	3%
 Nightlife	22%
Bars or pubs	9%
Live music performances	9%
Casinos or gaming venues	7%
Nightclubs or dance venues	6%
 Guided Tours	19%
Walking or city tours	8%
Wildlife or nature tours	6%
Boat or cruise tours	6%
Haunted or mystery tours	2%

Activity	%
 Winter-Based Activities	15%
Skiing or snowboarding	4%
Ice skating	4%
Snowshoeing	2%
Snowmobiling	1%
 High Intensity Activities	8%
Mountain biking	2%
Whitewater rafting	2%
Rock climbing (indoor or outdoor)	1%
ATVing	1%
Windsurfing or kitesurfing	1%

Q2. Thinking about all the memorable trips you've had within Ontario, what were your favourite leisure activities that you did?
All Respondents. n= 1600

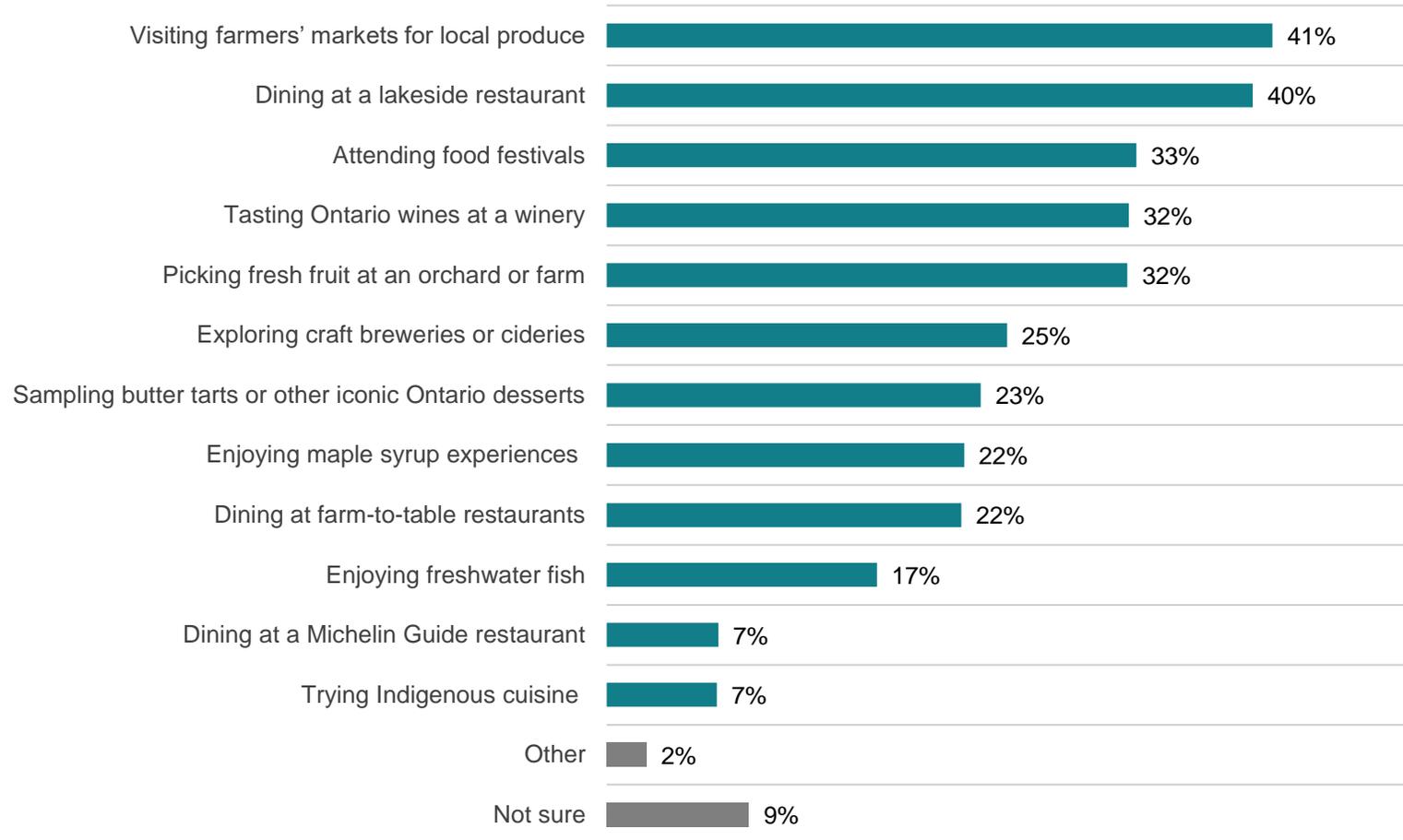
Two-fifths of Ontario residents list visiting farmers’ markets and dining at lakeside restaurants as their favourite food experiences.

Older residents aged 55 to 64 and travelling with friends are more likely to consider these experiences their favourites, with a significant interest during the spring and fall seasons.

While visiting farmers’ markets is often associated with extended family creating fun memories (52%), dining at lakeside restaurants is more commonly a date experience with a partner/spouse (44%).

In addition, parent with children are more likely to prefer picking fresh fruits at an orchard or farm, indicating that hands-on, family-friendly activities that combine outdoor engagement with learning and fun are particularly appealing to this group.

Favourite Ontario Food Experience



Q3. Thinking about all the memorable trips you’ve had within Ontario, what were your favourite food experiences? (Multi-select)
All Respondents. n= 1600

IDEAL ONTARIO FOOD TOUR

Niagara, Toronto, and Prince Edward County stand out as Ontario's top food destinations, each offering unique culinary experiences—from luxury winery dining to vibrant urban eats and artisanal rural charm.



Niagara Region

This is the most mentioned food destination by Ontario residents. Mentions include wine tours, farm-to-table restaurants, peach and cherry picking, butter tart trails, and culinary festivals.

Specific Spots:

- Peller Estates
- Two Sisters
- Niagara Culinary Tours



Toronto

Ontarians highlighted the diversity of Toronto food — from international cuisine (e.g., Ethiopian, Indian, Korean BBQ) to Michelin-starred restaurants and iconic spots. Food tours, cultural festivals, and fusion fare were often cited.

Specific Spots:

- Food-centred districts (St. Lawrence Market, Kensington Market, Distillery District, Chinatown, Greektown, Little Italy)
- Food tours (Tasty Tours, Secret Food Tours)
- Michelin-star restaurants (Alo, Scaramouche, Canoe)
- Food festivals (Taste of the Danforth, CNE)



Prince Edward County

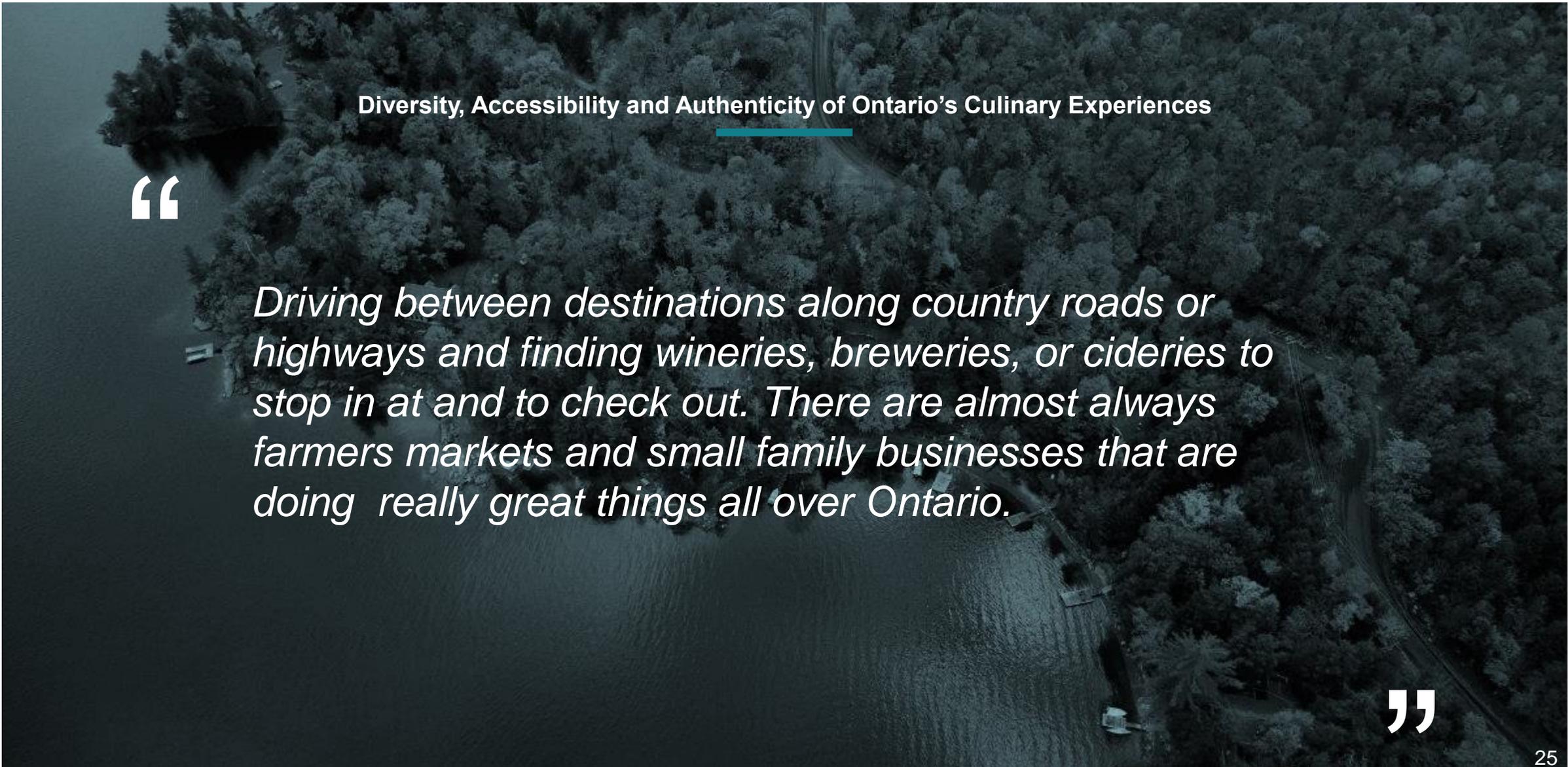
Residents mentioned Prince Edward County's wineries, farm-to-table restaurants, cheese trails, and seasonal fruit picking (apples, peaches, etc.).

Specific Spots:

- The Royal Hotel
- The Drake Devonshire
- Slickers Ice Cream

Q4. Pretend that you are designing an Ontario food tour, which three stops are “must-visits”?

All respondents. n=1600

An aerial photograph of a lush green forest bordering a calm lake. The trees are dense and vibrant, and the water reflects the surrounding greenery. A small road or path is visible winding through the forest.

Diversity, Accessibility and Authenticity of Ontario's Culinary Experiences

“

Driving between destinations along country roads or highways and finding wineries, breweries, or cideries to stop in at and to check out. There are almost always farmers markets and small family businesses that are doing really great things all over Ontario.

”

SEASONAL PREFERENCES AND UNEXPECTED DISCOVERIES

Summer and fall are the most preferred seasons for Ontario getaways.

- In spring and summer, residents enjoy visiting small towns, scenic drives, hiking, outdoor dining, camping, and swimming, with two-fifths listing these as favourite warm-weather activities.
- Fall travel is centered around nature experiences, with over half of Ontarians favouring hiking, leaf-watching, and scenic drives to enjoy vibrant foliage.
- In winter, around two in five residents seek cozy escapes and holiday markets or Christmas villages, highlighting seasonal charm and comfort.

Residents are often pleasantly surprised by Ontario's natural beauty, variety of activities, and local charm. They noted outdoor scenery and adventure as their most unexpected discovery.

Food and drink also offered delightful surprises, especially in small towns with family-run restaurants, wineries, and farmers' markets.

Many were struck by the unexpected variety of things to do across Ontario—from kayaking and festivals to hidden attractions—realizing they didn't need to leave the province for rich, memorable experiences.



SEASON GETAWAYS

Summer and Fall are highly preferred when choosing a short getaway in Ontario.

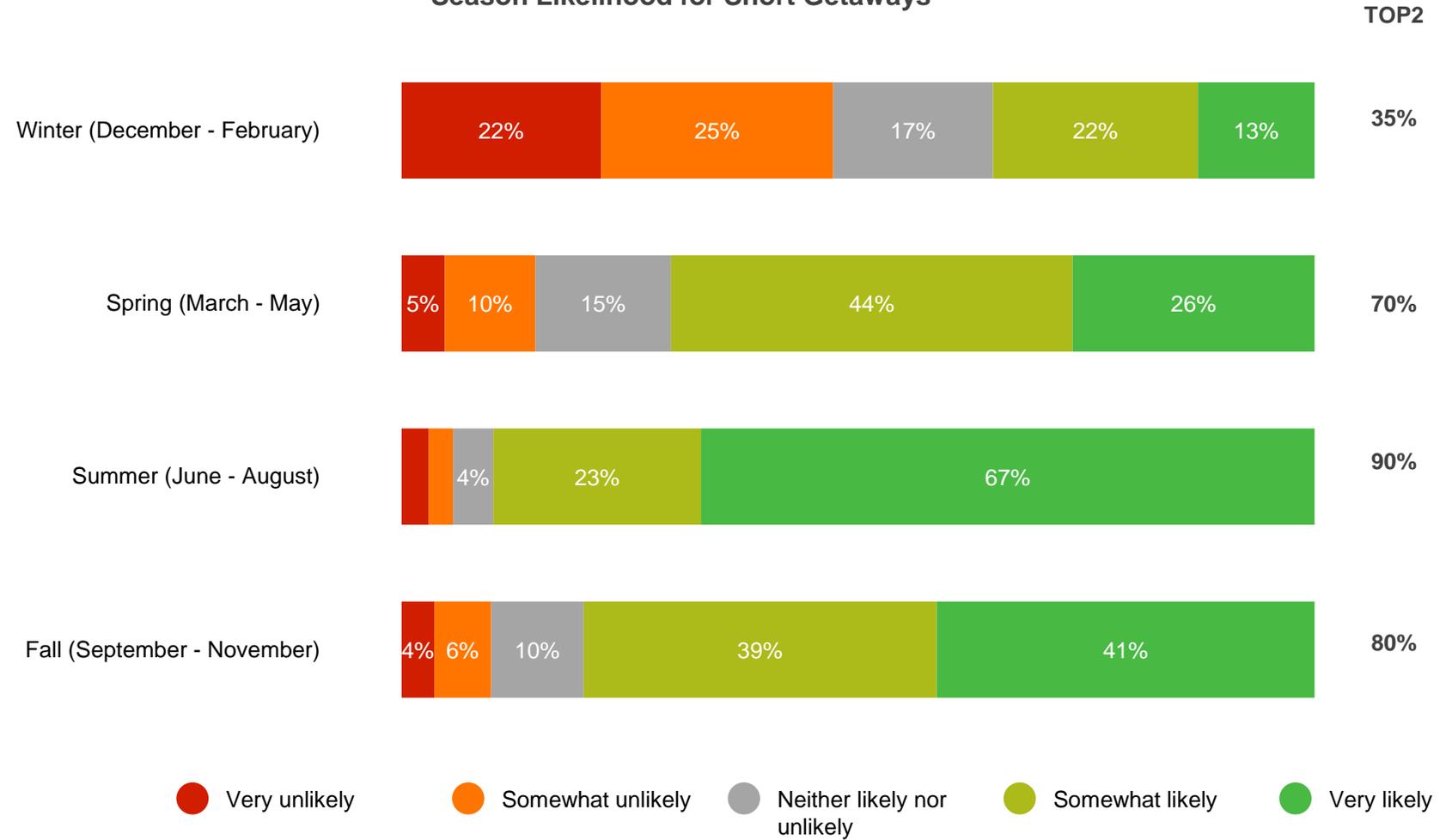
During the summer, travel is significantly more family-oriented (94%), as schools are out of session, and families are looking for attractions to do together (93%), like water-based activities (94%).

Fall tends to attract residents aged 55-64, travel with their partner/spouse, and don't have children in the household.

Spring is favoured by residents staying in hotels or motels and planning to travel with friends.

Residents choosing winter are considering high intensity activities for their next trip.

Season Likelihood for Short Getaways



Q5. When it comes to choosing a short getaway trip of one to three nights, to what extent will Ontario be your preference for each of the following seasons?(Labels <4% not visualized) (Excludes "Don't know") (n=1575-1585)

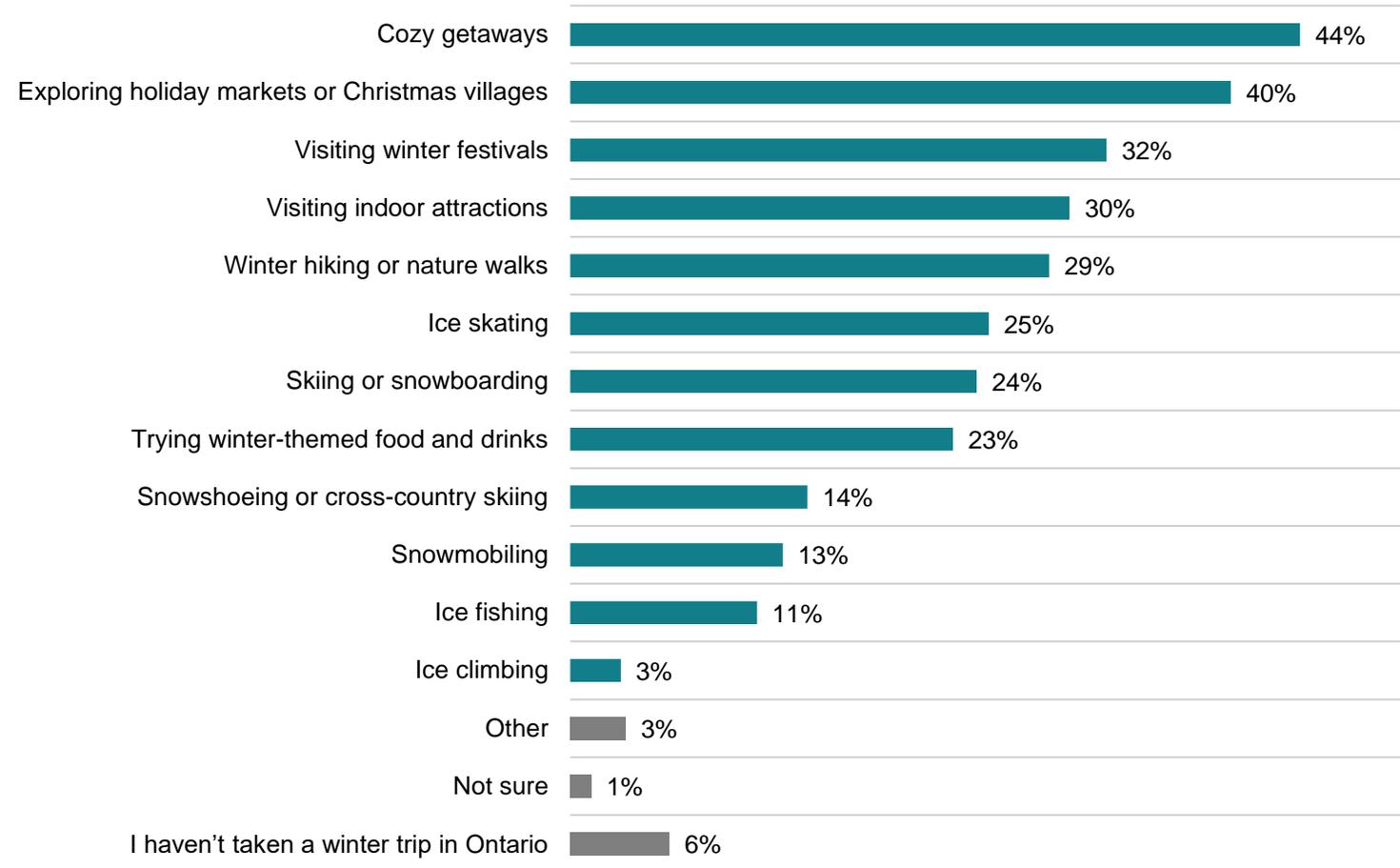
Around two in five residents state cozy getaways and exploring holiday markets or Christmas villages as their top winter experiences in Ontario.

Based on these preferences, Ontarians seem to embrace the winter/holiday cheer while seeking warmth from the cold weather.

Women are more likely to enjoy exploring holiday markets and Christmas villages.

Parents who have children are more likely to enjoy ice skating indicating that family-friendly, seasonal activities that are active, social, and accessible hold strong appeal for this group, offering opportunities for bonding and creating lasting memories together.

Favourite Ontario Winter Activities



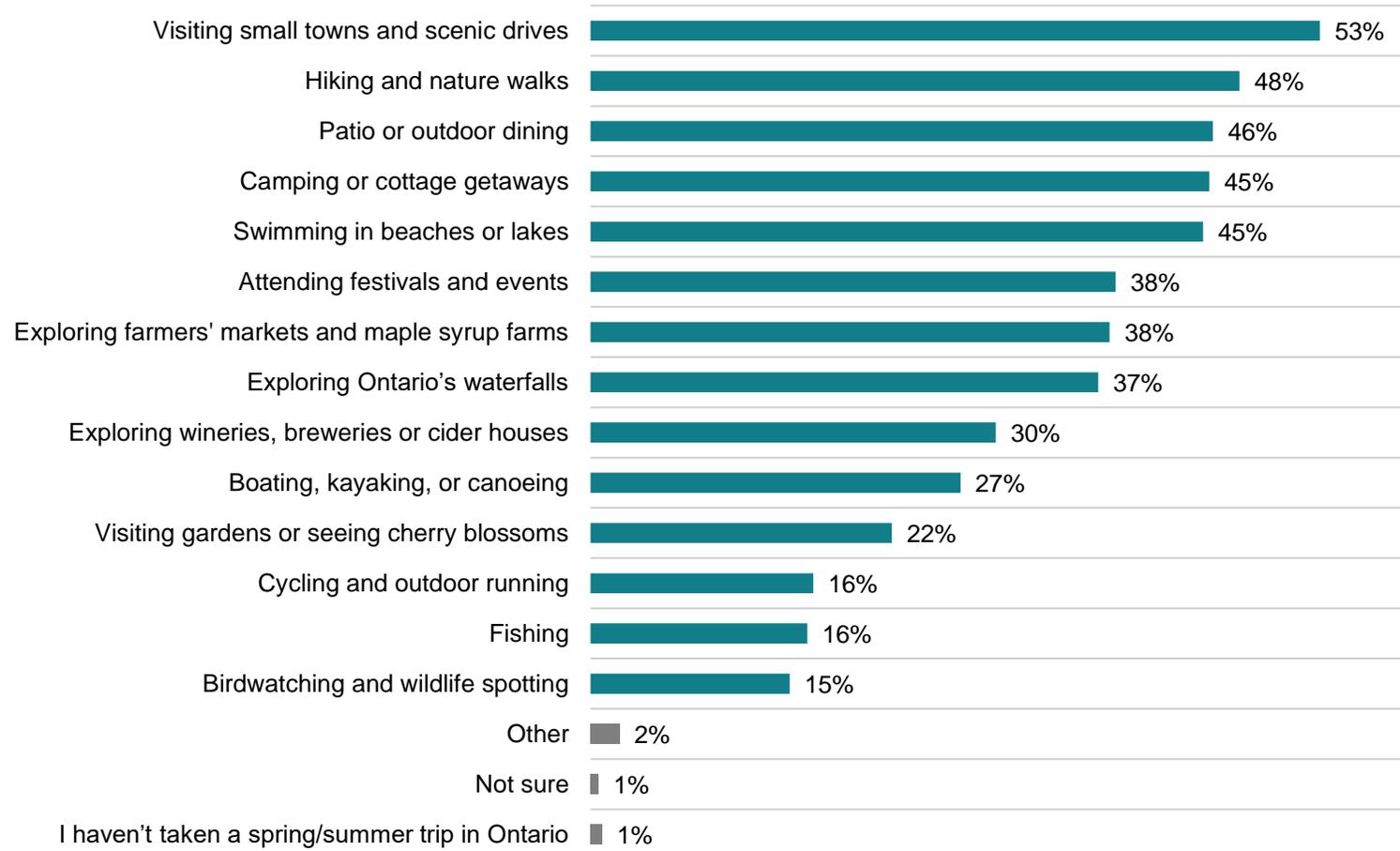
Q6A. Think about all the trips you've taken in the winter in Ontario. What were your favourite winter experiences? (Multi-select)
All Respondents. n=555

Visiting small towns and scenic drives, hiking and nature walks, patio/outdoor dining, camping/cottage getaways, and swimming are the top warm season activities, with two-fifths of Ontarians listing them as their favourites.

Older residents tend to prefer visiting small towns and exploring farmers' markets, indicating that they value relaxed, authentic experiences that offer a strong sense of community, local culture, and connection to tradition.

Those who highly enjoy camping and swimming are planning to travel with family, friends, and extended members. However, small town trips are more often taken with friends, and by people without children.

Favourite Ontario Spring/Summer Activities



Q6B. Think about all the trips you've taken in the spring and/or summer in Ontario. What were your favourite spring/summer experiences? (Multi-select)

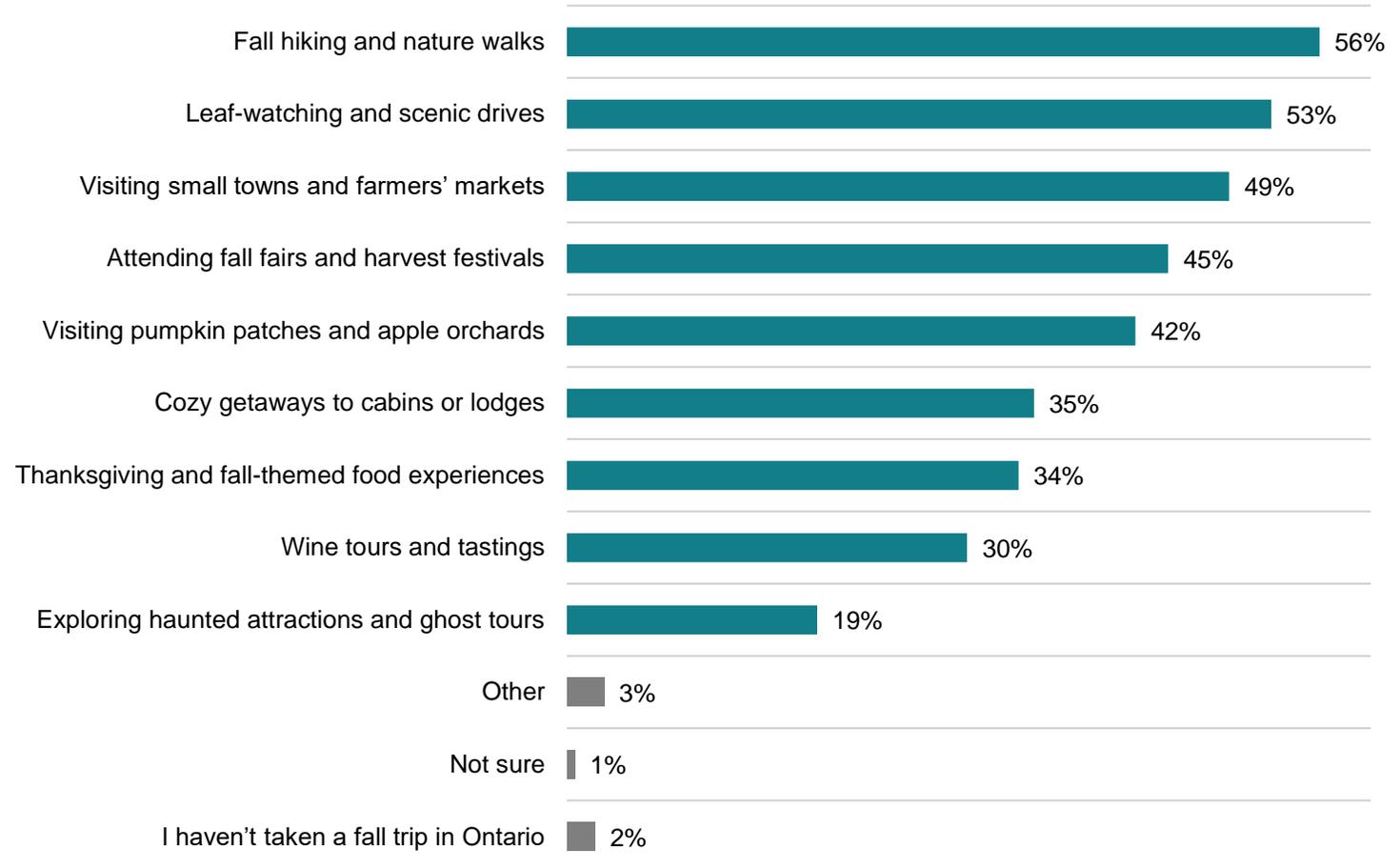
All Respondents. n=1479

Respondents favour nature experiences in fall, with over half indicating that hiking and nature walks, as well as leaf-watching and scenic drives, as their favourite activities during the season.

Women and non-BIPOC residents without children are more likely to list these activities as their favourite.

Older residents prefer leaf-watching and scenic drives while younger residents prefer visiting pumpkin patches and apple orchards, indicating that different age groups seek seasonal experiences that align with their interests—older adults favouring leisurely, nature-focused activities, while younger individuals are drawn to interactive, social outings that offer opportunities for photos, exploration, and hands-on engagement.

Favourite Ontario Fall Activities



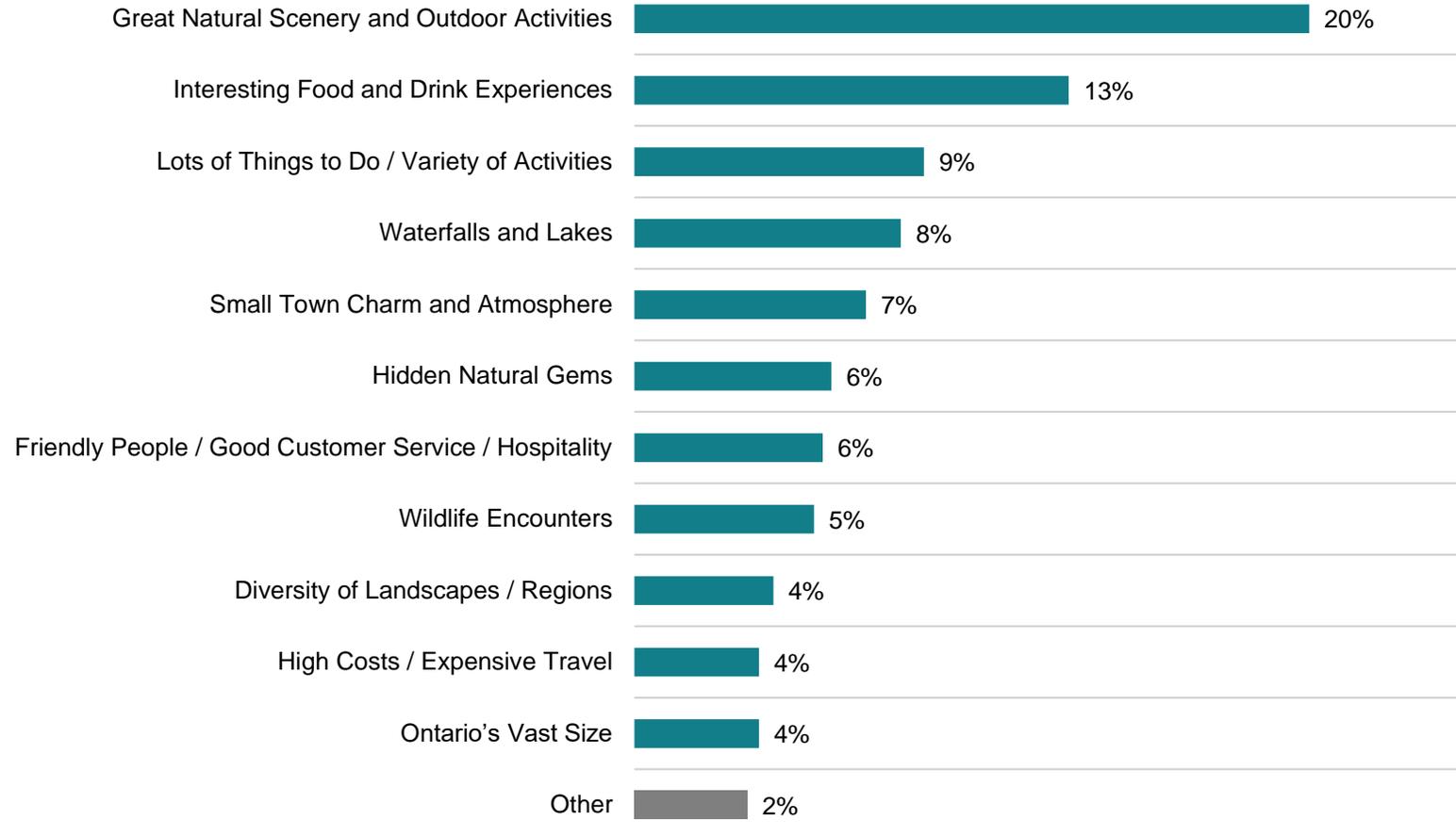
Q6D. Think about all the trips you've taken in the fall in Ontario. What were your favourite fall experiences? (Multi-select)
All Respondents. n=1269

TRAVELLER'S UNEXPECTED DISCOVERIES

Overall, residents are most surprised by Ontario's natural beauty, range of activities, and local charm.

Great natural scenery and outdoor activities stood out the most, surprising 20% of respondents.

Unexpected Discoveries



Q7. What's the most unexpected or surprising thing you've discovered while travelling in Ontario?
All respondents. n=1600

Great Natural Scenery and Outdoor Activities

Ontario residents were overwhelmingly surprised by the sheer beauty and diversity of the province's natural landscapes. Many described the scenery as "breathtaking," "stunning," and "picturesque," highlighting lush greenery, vibrant fall colors, and clear blue lakes as standout features. Popular spots like Tobermory, Bruce Trail, Elora, Sandbanks, and Algonquin Park were frequently mentioned for their crystal-clear waters, dramatic cliffs, and scenic views.

Respondents were also impressed by the abundance of outdoor activities available, including hiking, cycling, camping, kayaking, and backcountry exploration. Waterfalls, conservation areas, and nature trails added to the sense of discovery, with many people surprised at how much was accessible close to urban centers.

Several noted that Ontario's natural beauty rivaled that of more famous destinations, with comparisons to the Caribbean or Western Canada. The vastness of the northern regions, density of forests, and variety of wildlife also left lasting impressions.

Overall, people were delighted to find that so much natural beauty and outdoor adventure was "right under their noses," offering memorable and immersive experiences without needing to leave the province.

“ One of the most surprising things about traveling in Ontario is **how diverse the landscapes are**. You can go from the bustling, urban energy of Toronto to the serene, **natural beauty of places like Algonquin Park or the Thousand Islands, all within just a few hours of each other**. The mix of outdoor adventures and vibrant city culture is unexpected, offering both nature lovers and city enthusiasts. ”

“ **No matter where we go, we find so many beautiful waterfalls along the way**. In Balls Falls, we were walking the trails and came across one of the most beautiful ones of them all. Many are hidden, but you come across so many beautiful ones once you walk. We stopped, took photos several times, and enjoyed a lovely lunch (picnic) with them. ”

“ One of the most unexpected and surprising things I've discovered while traveling in Ontario is just **how diverse and unique each region is**. From the breathtaking turquoise waters of Tobermory—which feel like they belong in the Caribbean—to the endless vineyards of Niagara-on-the-Lake, **every place has its own charm**. ”

Interesting Food and Drink Experiences

Many Ontario residents were pleasantly surprised by the diverse, high-quality food and drink experiences they discovered while travelling within the province. A recurring theme was the unexpectedly excellent dining options in small towns, including family-owned restaurants, charming bakeries, local cafes, and farm-to-table eateries that rival offerings in major cities.

Wineries, breweries, and cideries featured prominently in responses, with areas like Niagara-on-the-Lake, Bala, and Perth highlighted for wine tours, ice wines, and craft beverages. People were especially surprised by the number of local wineries and the quality of Ontario wines, including niche experiences like cranberry wine tours and water buffalo cheese making.

Respondents also mentioned the diversity of cuisines, especially in urban centers like Toronto, and were impressed by the wide availability of ethnic food, vegan options, and fresh local produce at farmers' markets and food festivals. Many enjoyed discovering hidden food gems and found great restaurants in unexpected places, often stumbled upon while driving through the countryside.

“

*We **appreciate the efforts that small towns in Ontario use their waterfront and riverfront locations** for restaurants, cafes and hotels/motels.*

”

“

*I've always enjoyed finding really good restaurants in small towns that are tucked out of the way from the main road. **You don't need to be in a major city to find good dining.***

”

“

*The extent of **cultural experiences that can be available in a small town** like Stratford and the concomitant availability of decent vegan dining options.*

”

Lots of Things to Do / Variety of Activities

Ontario residents were pleasantly surprised by the wide range of things to do and see across the province. Many commented on the unexpected diversity of activities, ranging from outdoor adventures such as kayaking, fishing, snowboarding, and dragon boat races, to cultural events, fairs, festivals, and local traditions.

Respondents were especially impressed by how much Ontario has to offer beyond its major cities, noting that even small towns often feature exciting or unique experiences. People highlighted road trips, local attractions, and regional events as great ways to explore the province, often discovering new activities close to home that they previously thought required travelling elsewhere.

A key takeaway was that Ontario offers something for everyone—whether urban multicultural experiences, small-town charm, or natural escapes. The abundance and accessibility of experiences made many realize they didn't need to leave the province for fun, variety, or memorable adventures.

Even those who initially thought Ontario lacked variety were surprised by how much there is to explore, with some noting that every trip revealed something new from unadvertised festivals to hidden attractions.

“ *The **wide variety of experiences available**. Big cities with a multicultural population vs small towns with more focus on local traditions. The eastern end of the province bordering on Quebec has a strong French influence which is reflected in the culture and language.* ”

“ *I always thought I had to leave the province to find satisfying experiences, but have discovered **Ontario has so many great things to do and places to visit**.* ”

“ *How many different types of fairs and festivals there are. Not always well advertised but **there seems to always be something going on across the province**.* ”

IMPACT ON TRAVEL

Nearly nine in ten Ontario residents are likely to take an overnight pleasure trip within the province in the next year, a steady trend since Fall 2024. Residents are more inclined to travel within Ontario than to other provinces or internationally, reflecting a preference for convenience, familiarity, and accessibility.

Travel to the US is significantly deterred by a combination of financial and socio-political barriers. Around half of Ontarians are discouraged from visiting the US due to the unfavourable exchange rate, anti-Canadian sentiment, political tensions, and overall cost of travel. These factors not only make US travel less financially appealing but also create a perception of being unwelcome, further reducing interest.

Only 27% of Ontarians are likely to travel to the US. Less than one-third feel welcome in the US, which is a key factor behind their lower travel intentions.

Despite this, Ontarians remain respectful toward US visitors, with nearly equal numbers holding a positive (44%) or neutral (43%) view. This reflects Canadian values of politeness and hospitality, especially among older residents. While younger Ontarians are less positive, they still maintain neutrality, demonstrating a balanced, courteous stance even amid political and economic tensions.

OVERNIGHT TRAVEL WITHIN ONTARIO

Nearly nine in ten residents are likely to take a pleasure trip for at least one night within Ontario in the next 12 months.

Those who are interested in local cuisine, nature experiences, festivals and events, family-focused attractions, and high-intensity activities are more likely to travel within Ontario.

Since Fall 2024, this likelihood metric has remained steady.

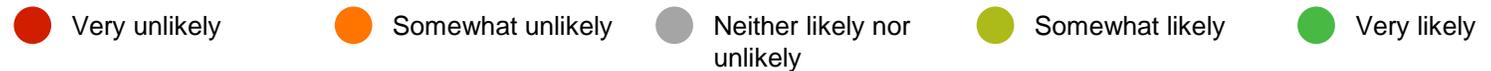
**Benchmarks:*

ON Winter 2025: 86%

ON Fall 2024: 85%

Likelihood Travelling Within Ontario

TOP2



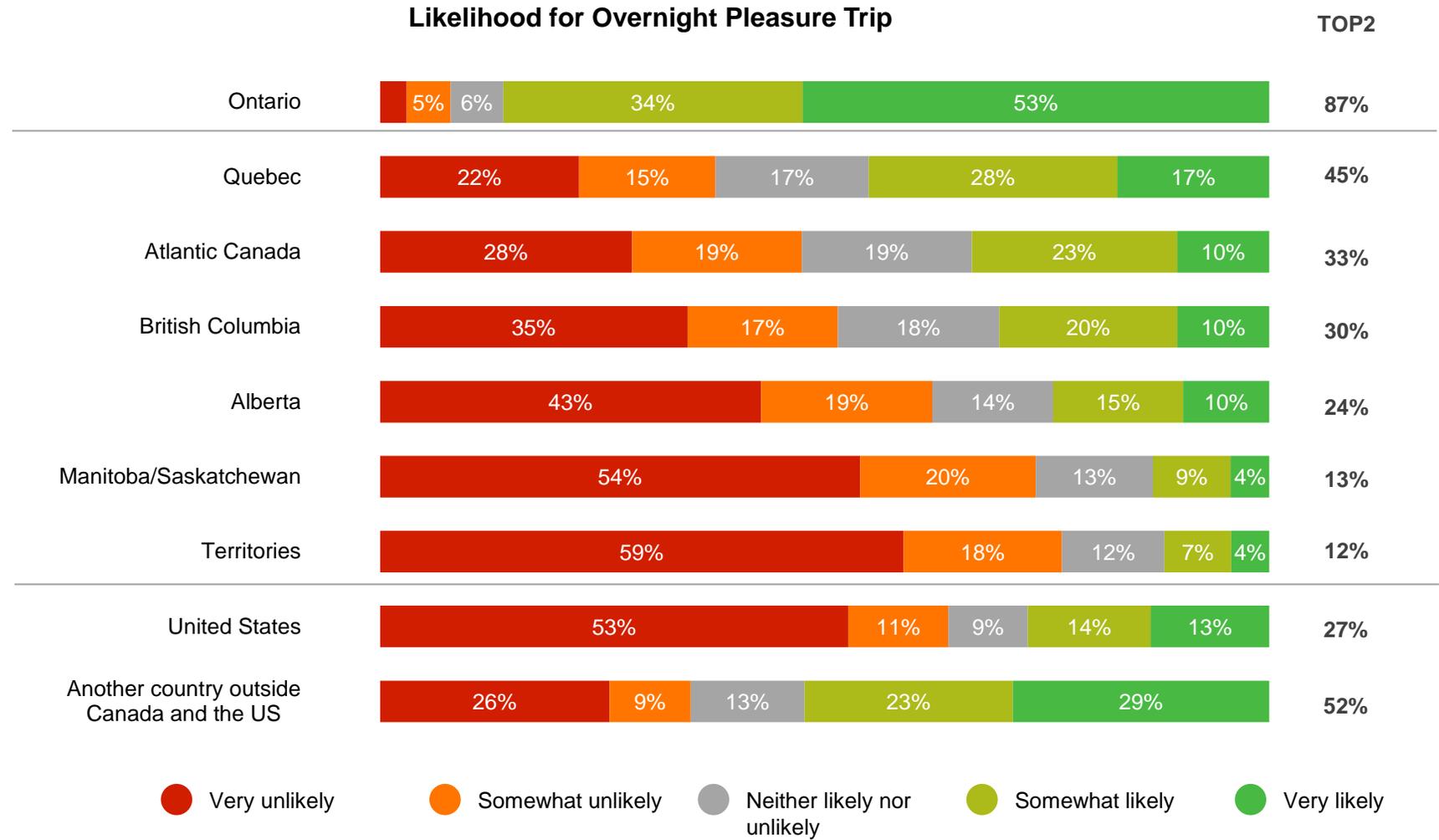
SC6. In the next 12 months, how likely are you to take a pleasure trip of one or more nights away within Ontario? (Excludes "Don't know")
All respondents. n=1580

OVERNIGHT TRAVEL DESTINATIONS

Ontario residents are more likely to travel within the province rather than to other provinces or outside of the country.

This suggests that Ontario residents may prioritize convenience, familiarity, and accessibility when making travel decisions. It could also indicate potential barriers to out-of-province or international travel, such as cost, time constraints, or travel restrictions.

Only 27% Ontarians say they are likely to travel to the US. In contrast, the US Pulse (Jan 2025) showed that 58% of US Drive/Fly residents are likely to travel to Ontario. This implies a significant imbalance in cross-border travel interest, with US residents showing a much stronger likelihood of visiting Ontario than Ontarians are of travelling to the US.



T1. In the next 12 months, how likely are you to take a pleasure trip of one or more nights away to... (Labels <4% not visualized) (Excludes "Don't know") (n=1543-1567)

WELCOMING ONTARIAN TRAVELLERS

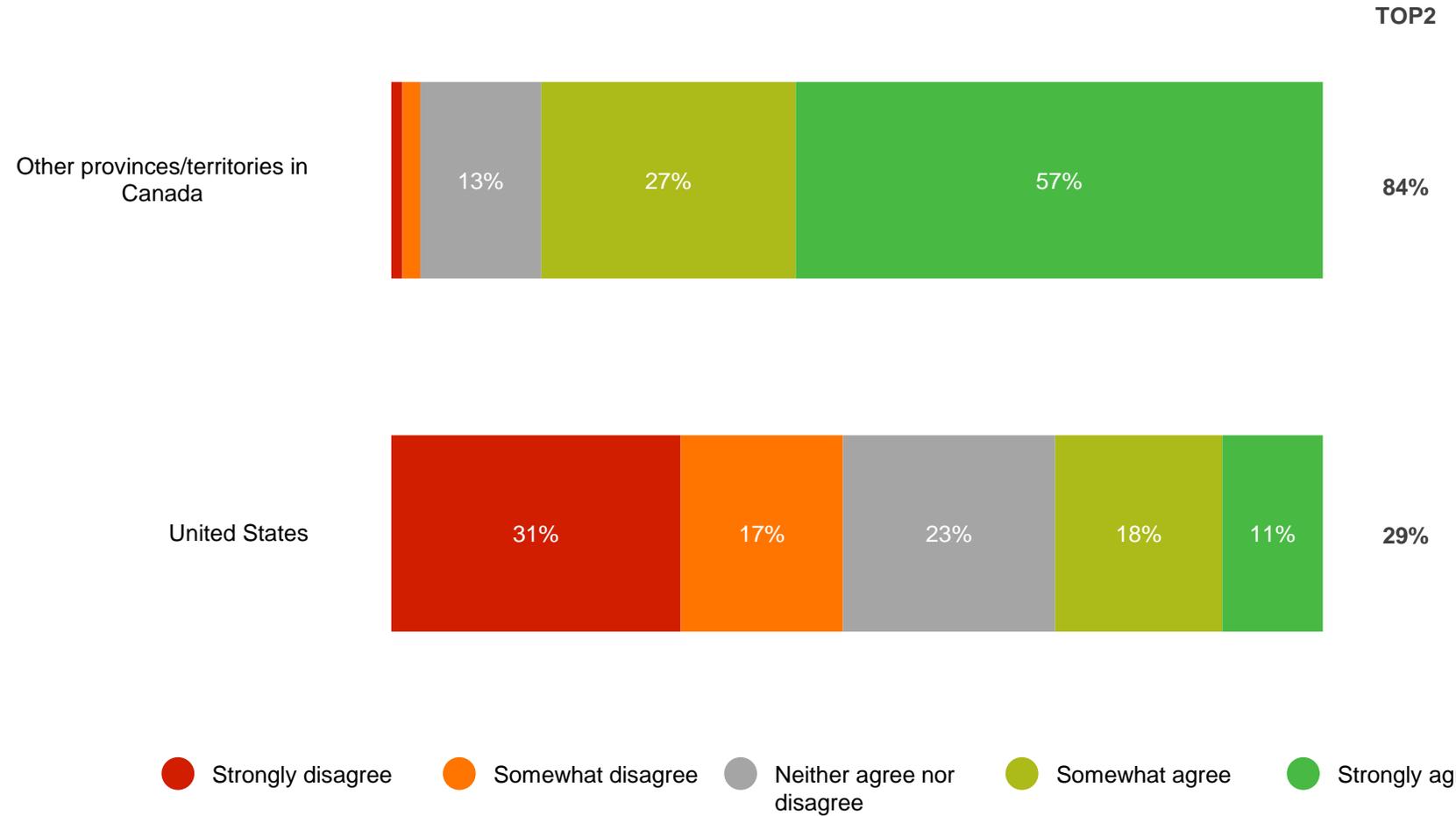
More than four in five Ontarians feel welcome in the rest of Canada. However, less than a third of Ontarians feel welcome in the US.

The perception that Ontarians do not feel welcome in the US may contribute to their lower likelihood of travelling there.

In contrast, the US Pulse (Jan 2025) showed that 90% of US residents feel welcome in Canada.

This imbalance of welcoming suggests a stark contrast in perceived hospitality between the two countries.

Perceptions of Feeling Welcomed



T3. How much do you agree or disagree that the following regions are currently welcoming to Ontarian travellers? (Labels <4% not visualized) (Excludes "Don't know") (n=1499-1538)

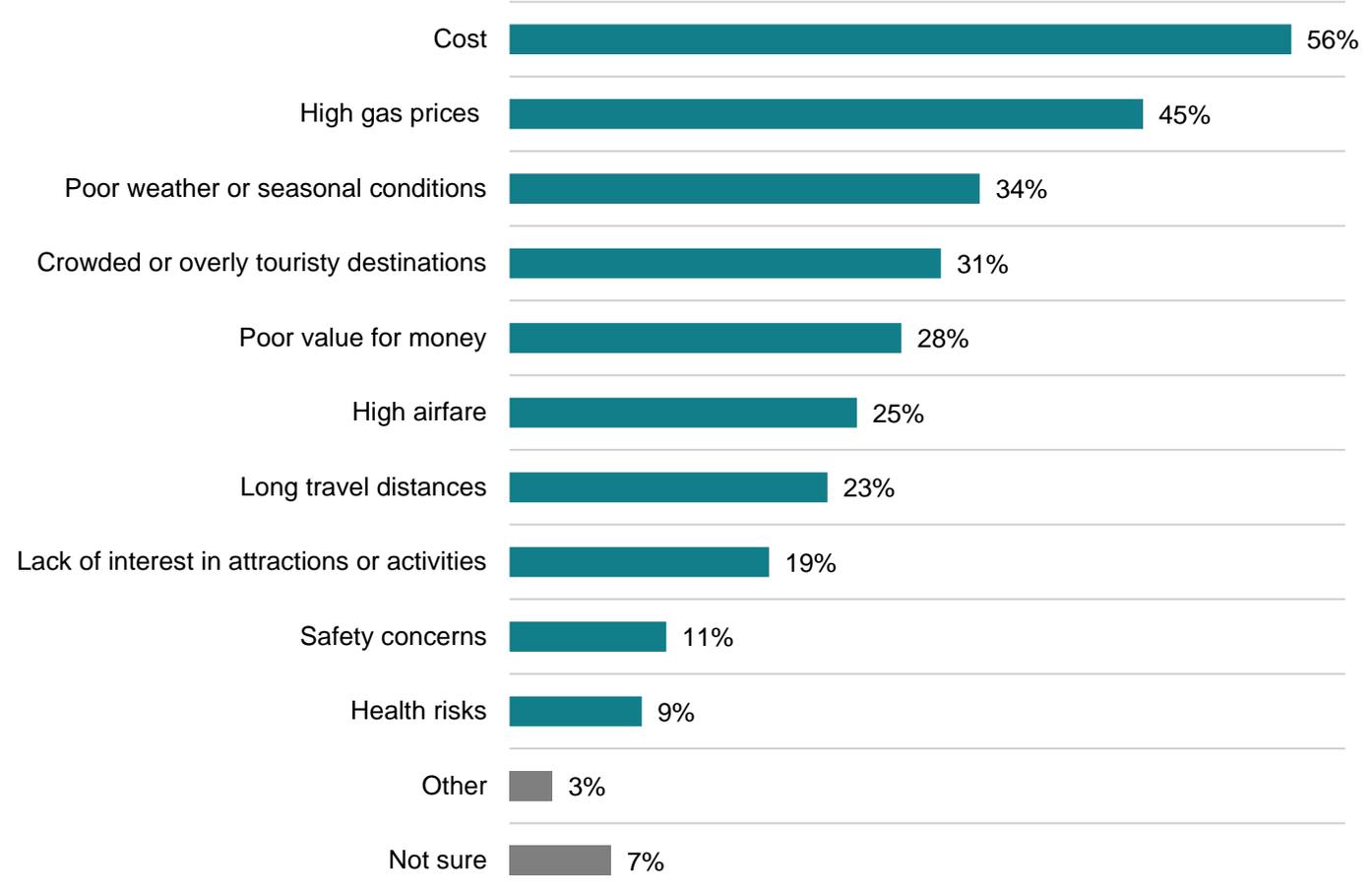
Cost is the top reason discouraging residents from travelling within Ontario.

Ontarians who are interested in shopping as an activity are more likely to be discouraged by cost.

Those discouraged by high gas prices tend to be from Southwest Ontario, have a household income of \$50K-\$100K, and are also considering shopping as part of their next trip.

This suggests that cost-related concerns are influencing Ontarians' travel plans, especially when considering shopping.

Factors Discouraging Travel Within Ontario



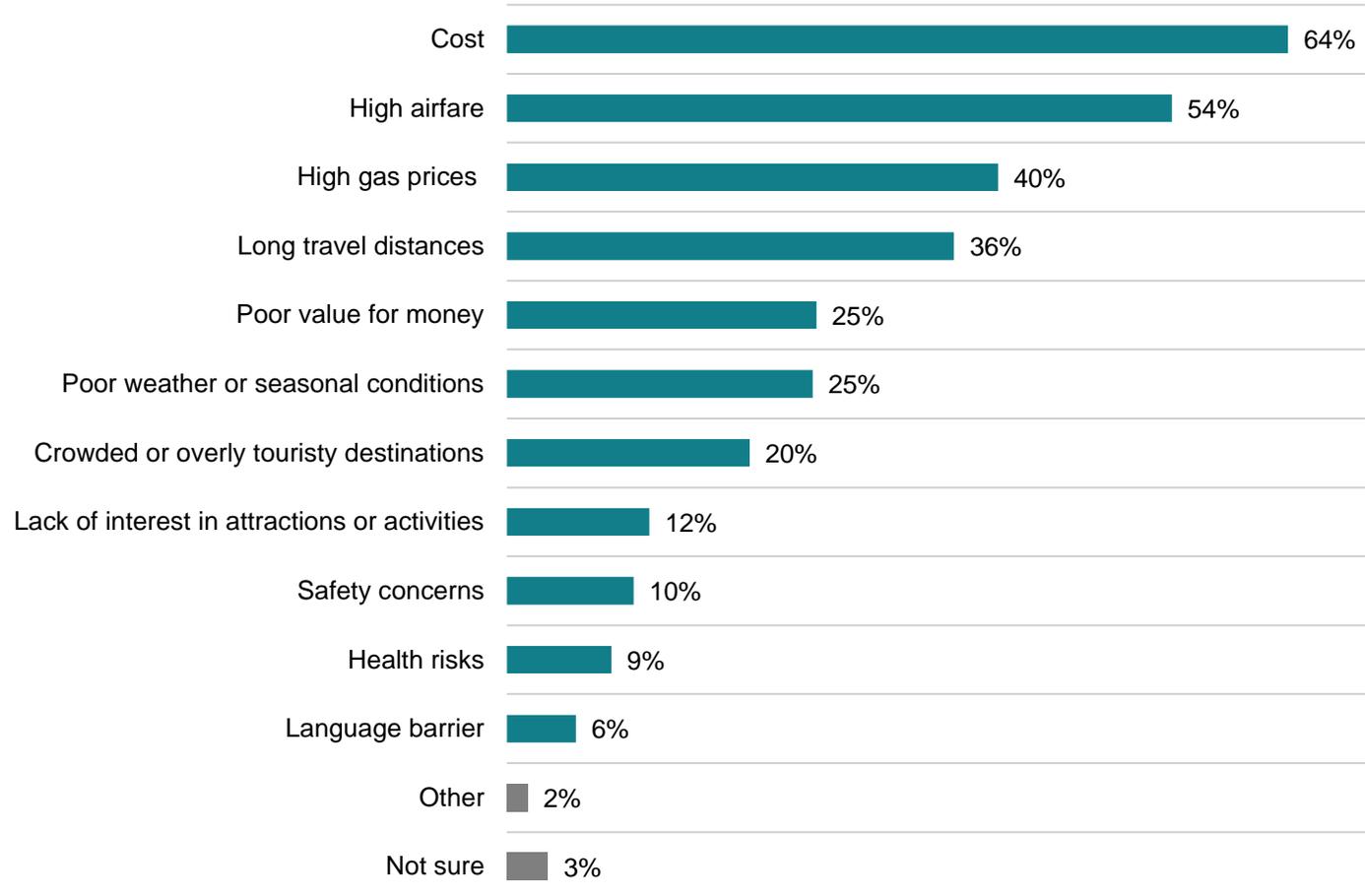
T4A. Which of the following factors might discourage you from travelling within Ontario? (Multi-select)
All Respondents. n=1600

Similar to travel barriers in Ontario, cost continues to be the primary factor discouraging residents from travelling across Canada.

Ontario residents discouraged by cost are more likely to be travelling with friends and considering local cuisine as an activity on their next trip.

Those concerned about high airfare prices tend to be women, travelling with friends and taking trips in the fall, considering local cuisine, shopping, and health/wellness activities for their trip.

Factors Discouraging Travel Within Canada



T4B. Which of the following factors might discourage you from travelling to other parts of Canada? (Multi-select)
All Respondents. n=1600

Around half of Ontarians are discouraged from travelling to the US due to the unfavourable exchange rate, anti-Canadian sentiment, political views, and cost.

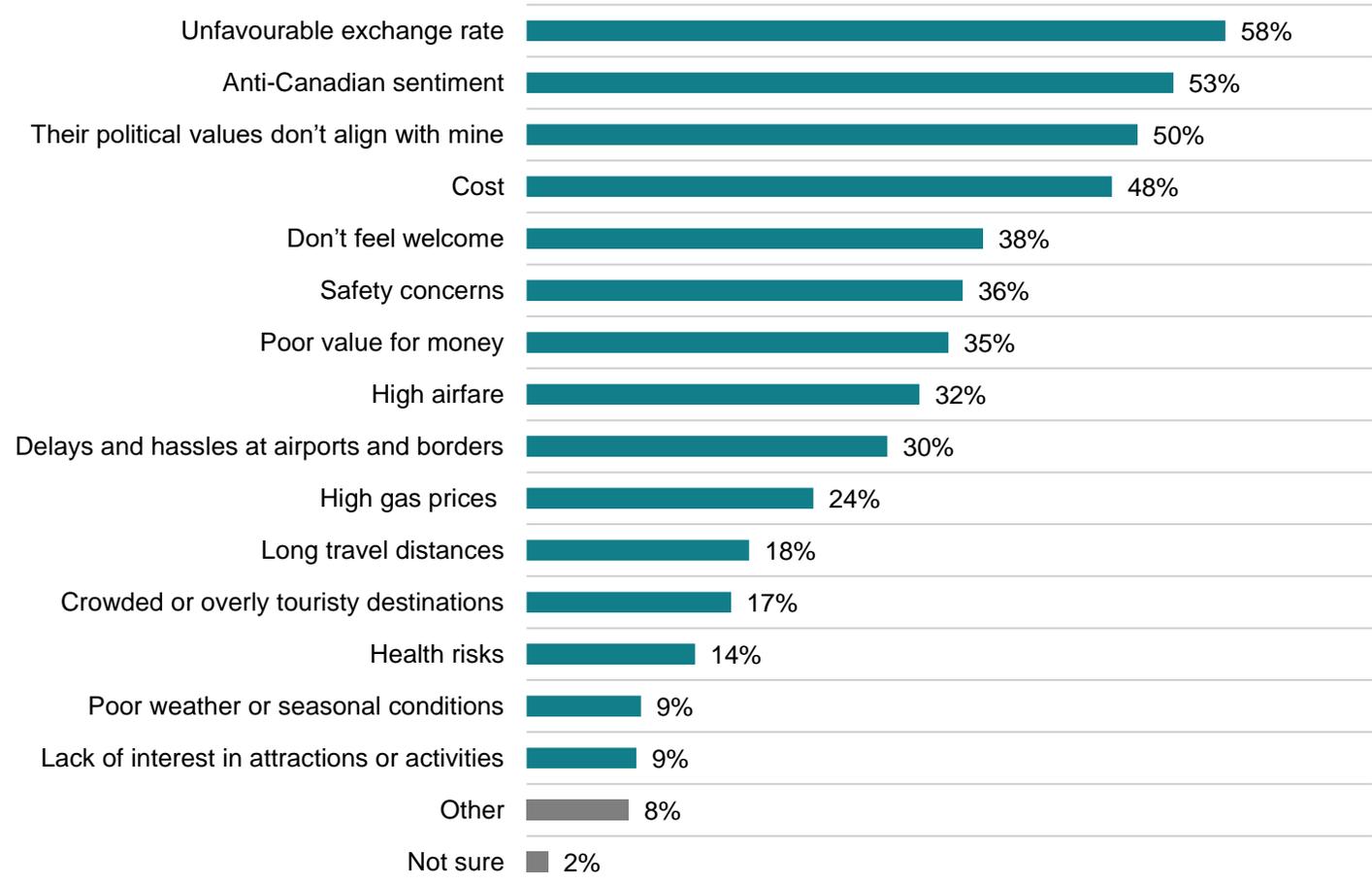
Ontarian travellers discouraged by the top three factors are more likely to be non-BIPOC and travelling during the fall season.

Those who are hindered by unaligned political values are more likely to be:

- Older (55-64 years old)
- Eastern Ontario residents
- Without children

There are also gender differences in the barriers: women are more likely to be discouraged by unaligned political values, while men tend to be hindered by poor value for money.

Factors Discouraging Travel to The United States



T4C. Which of the following factors might discourage you from travelling to the United States? (Multi-select)
All Respondents. n=1600

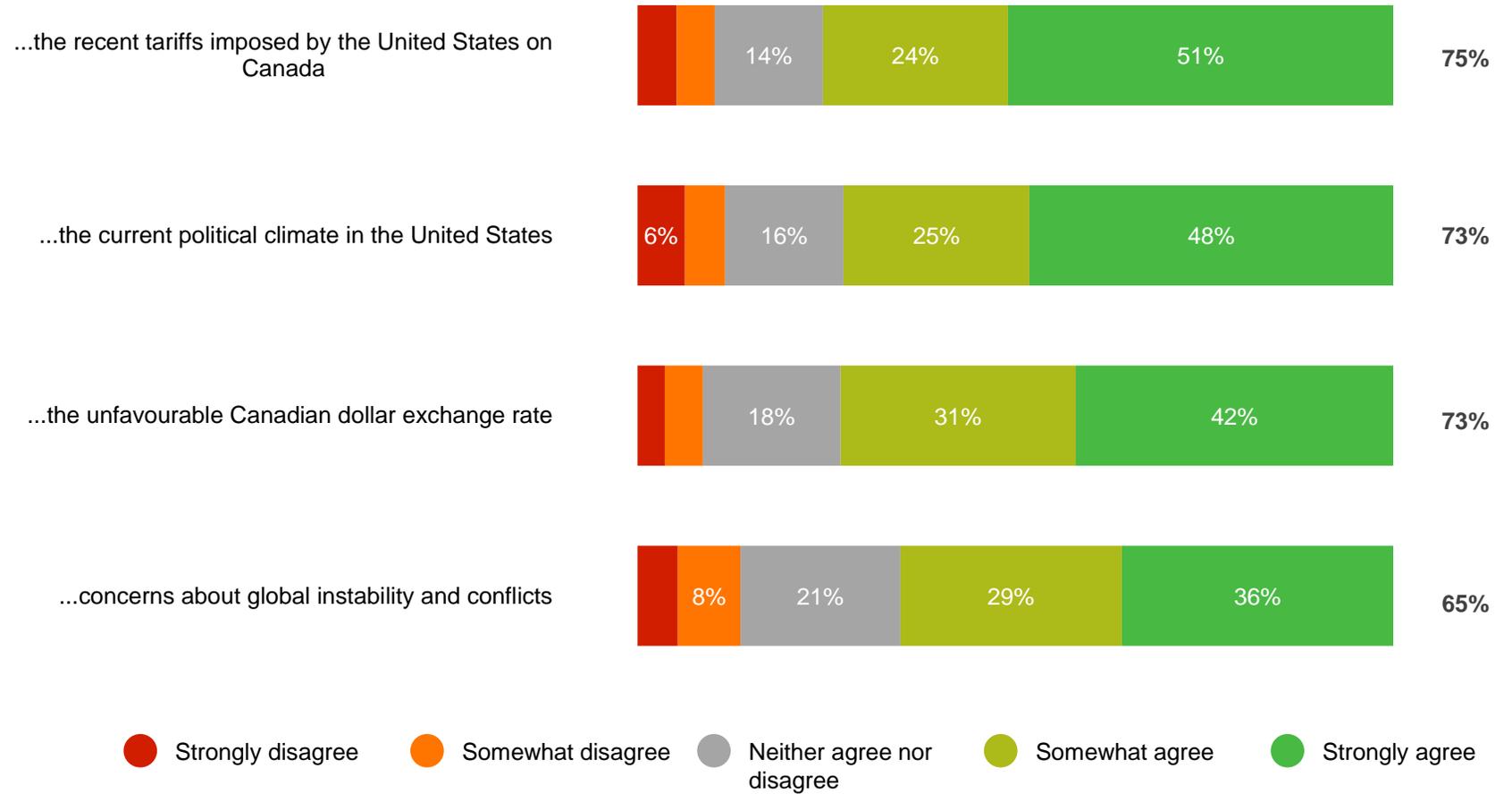
Three in four Ontarians agree that the recent tariffs, the political climate in the US, and the unfavourable exchange rate are the reasons to travel within Ontario.

Women are more likely to be impacted by the unfavourable exchange rates and global instability.

In addition, residents with higher income are more likely to be affected by the current political climate in the US.

I am more likely to travel within Ontario/domestically in the next 12 months because of...

TOP2



T5. How much do you agree or disagree with the following statements? (Labels <4% not visualized) (Excludes "Don't know") (n=1544-1565)

IEWS ON US TRAVELLERS

Nearly equal proportions of respondents hold an undecided position (43%) or a positive view (44%) of the US travellers visiting Ontario.

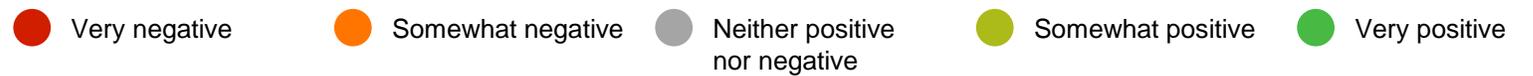
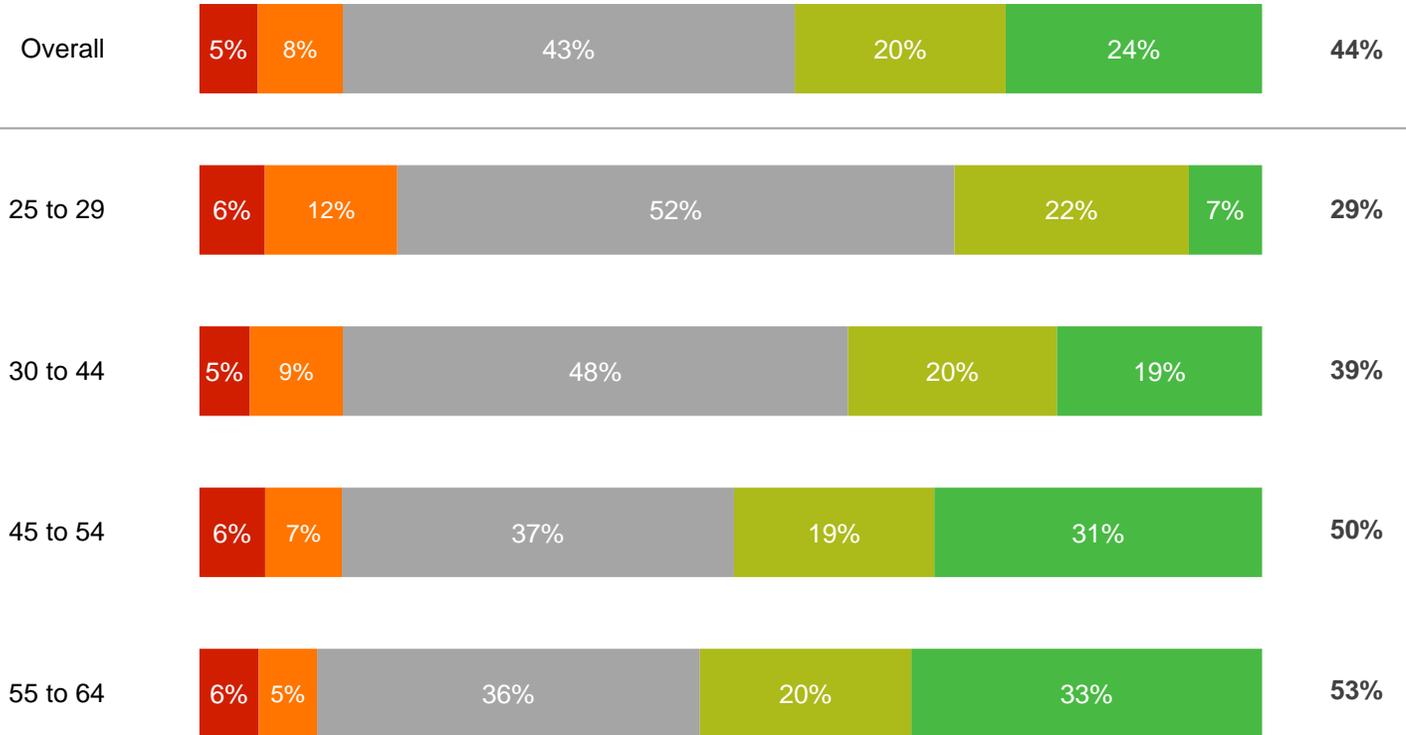
Despite Ontarians feeling less welcome and less inclined to travel to the US, Ontarians maintain a notably balanced and respectful stance toward American visitors.

Ontarians demonstrate politeness, humility, and a welcoming attitude typical of Canadian values. This neutral-to-positive outlook, even amid political tension, reflects a measured, hospitable approach, as they remain open and courteous to visitors.

Also, younger generations tend to be less positive than older residents but they still largely maintain a neutral stance.

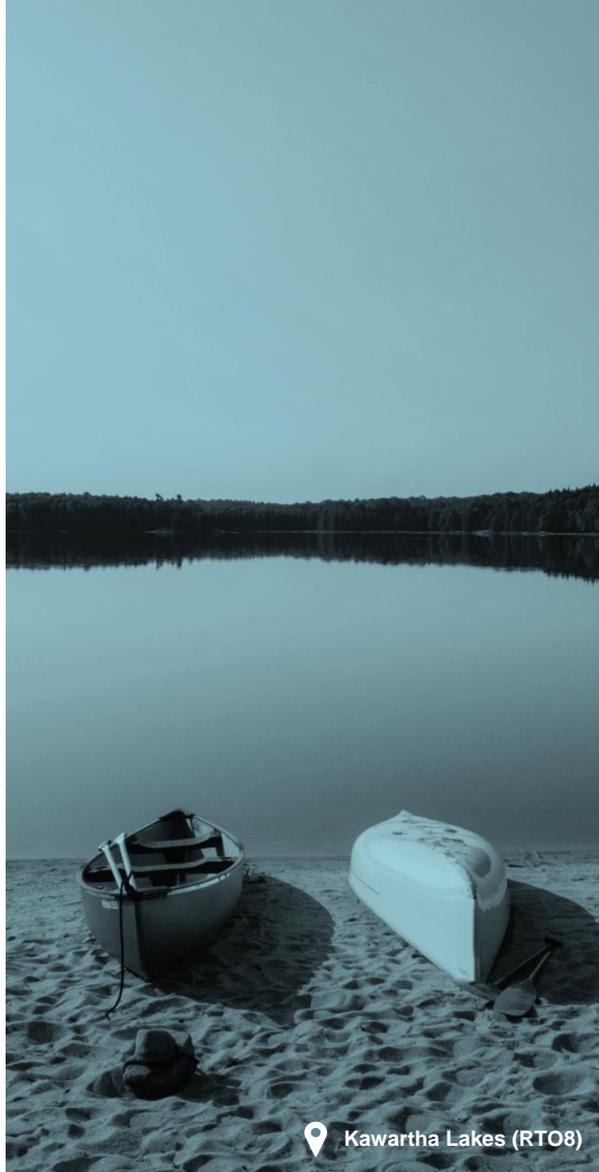
Sentiment Towards Visitors From The US

TOP2



T6. How do you currently view visitors from the United States travelling to Ontario? (Excludes "Don't know")
All respondents. n=1565

DEMOGRAPHICS



 Kawartha Lakes (RTO8)

OVERNIGHT ACCOMMODATIONS

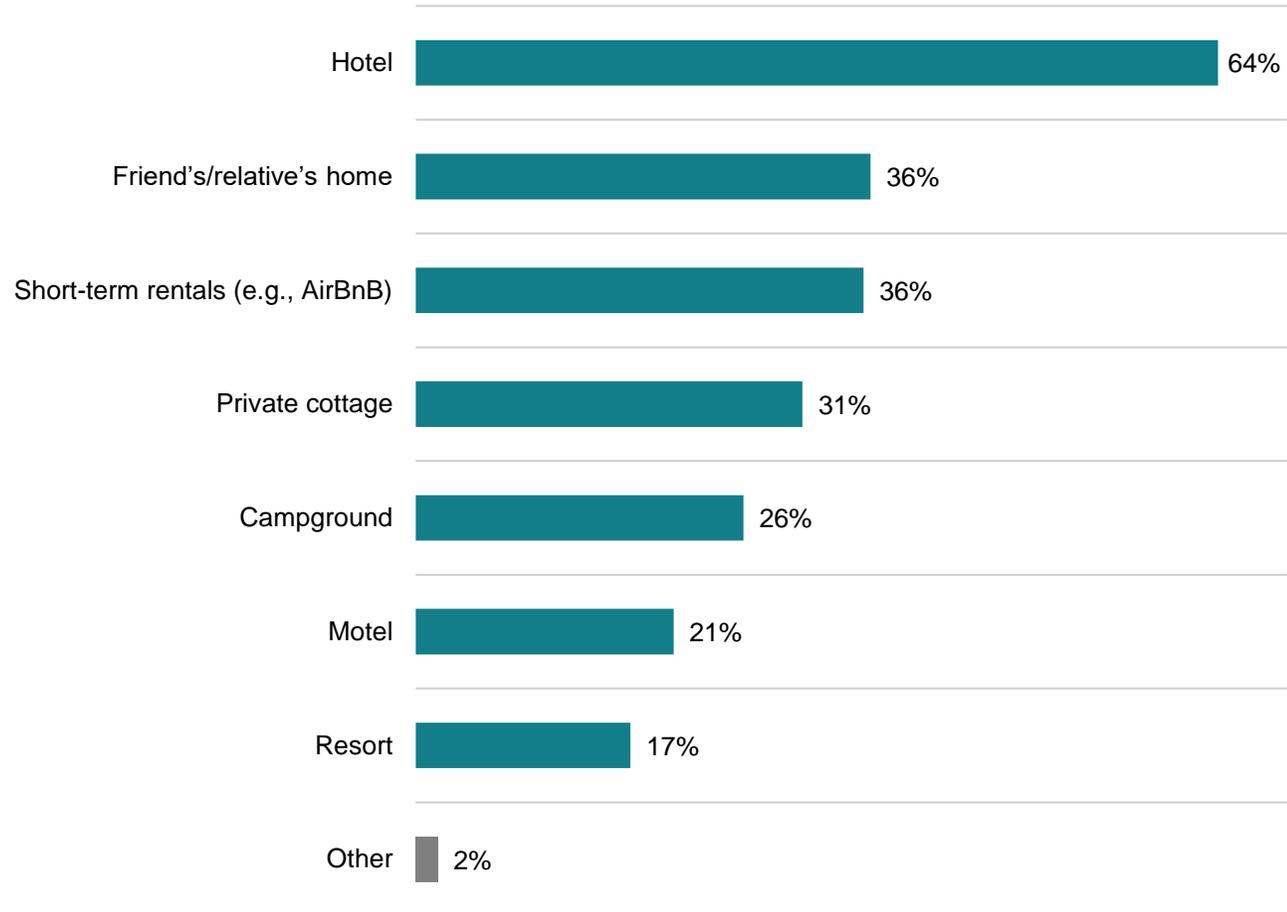
Hotels are the most preferred accommodation option, with three in five Ontario residents favouring this option for an overnight trip.

Hotel-stayers are more likely to take a trip in the winter and spring and have a household income of \$100K-\$150K.

Ontarians aged 25-29 are more likely to stay at a friend's/relative's home and short-term rentals. This suggests that this demographic group may be more budget-conscious.

Those staying at a short-term rental are more likely to be considering trips with nightlife, health/wellness, and high intensity activities during the winter, spring, and fall seasons.

Most Preferred Stay-In Options



Q8. When travelling within Ontario, what types of accommodations do you typically stay in? (Multi-select)
All Respondents. n=1600

TRAVEL GROUPS

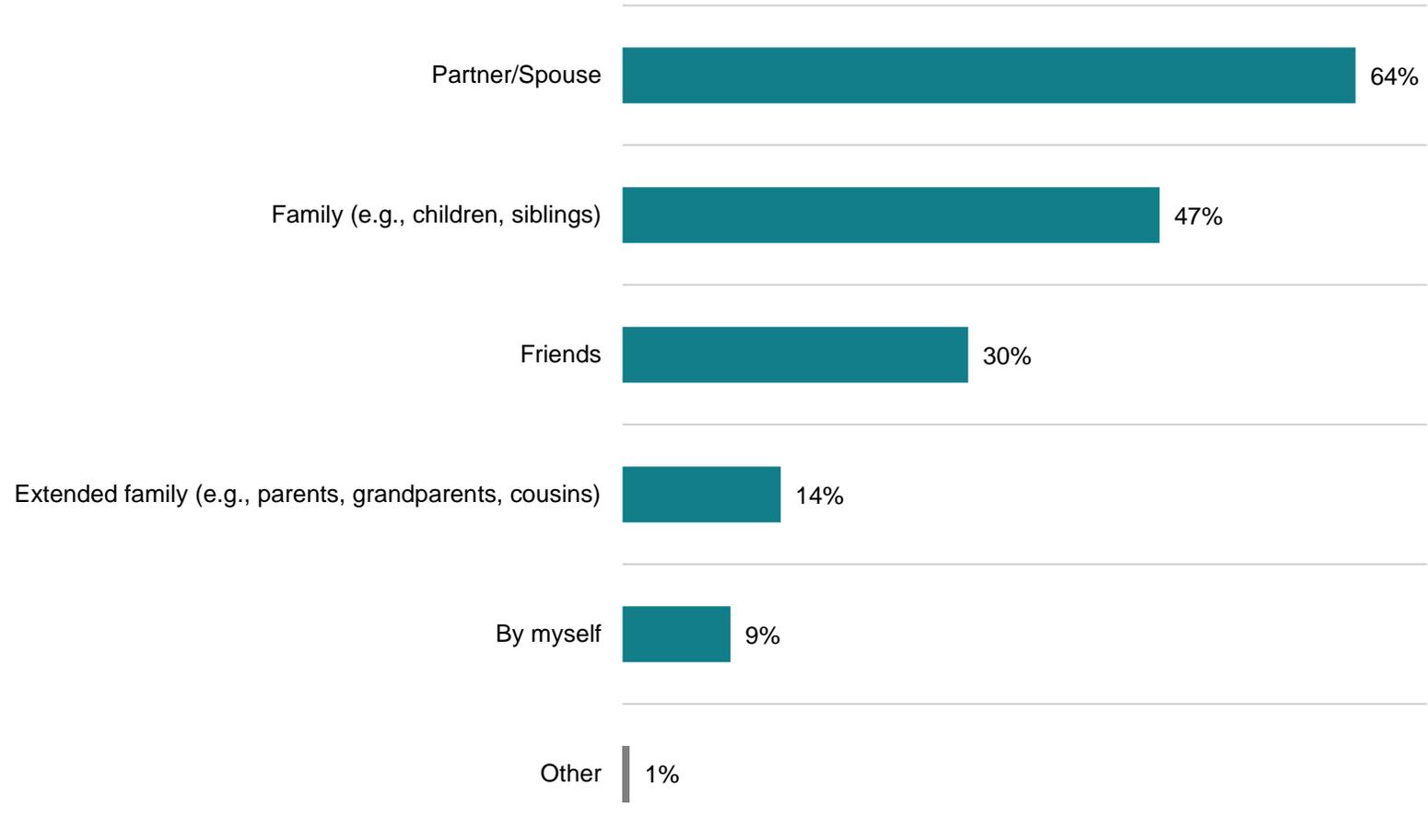
Around two-thirds of residents are planning to travel with their partner/spouse in the next 12 months in Ontario.

Residents planning a trip with their partner/spouse are significantly more likely to be 55-64 years old, have a household income of \$100K-\$200K, and considering health/wellness and recreational activities for their next travel plans.

Family travel groups are more likely to be aged 30-54, travel in summer, and consider family-focused and water-based trips.

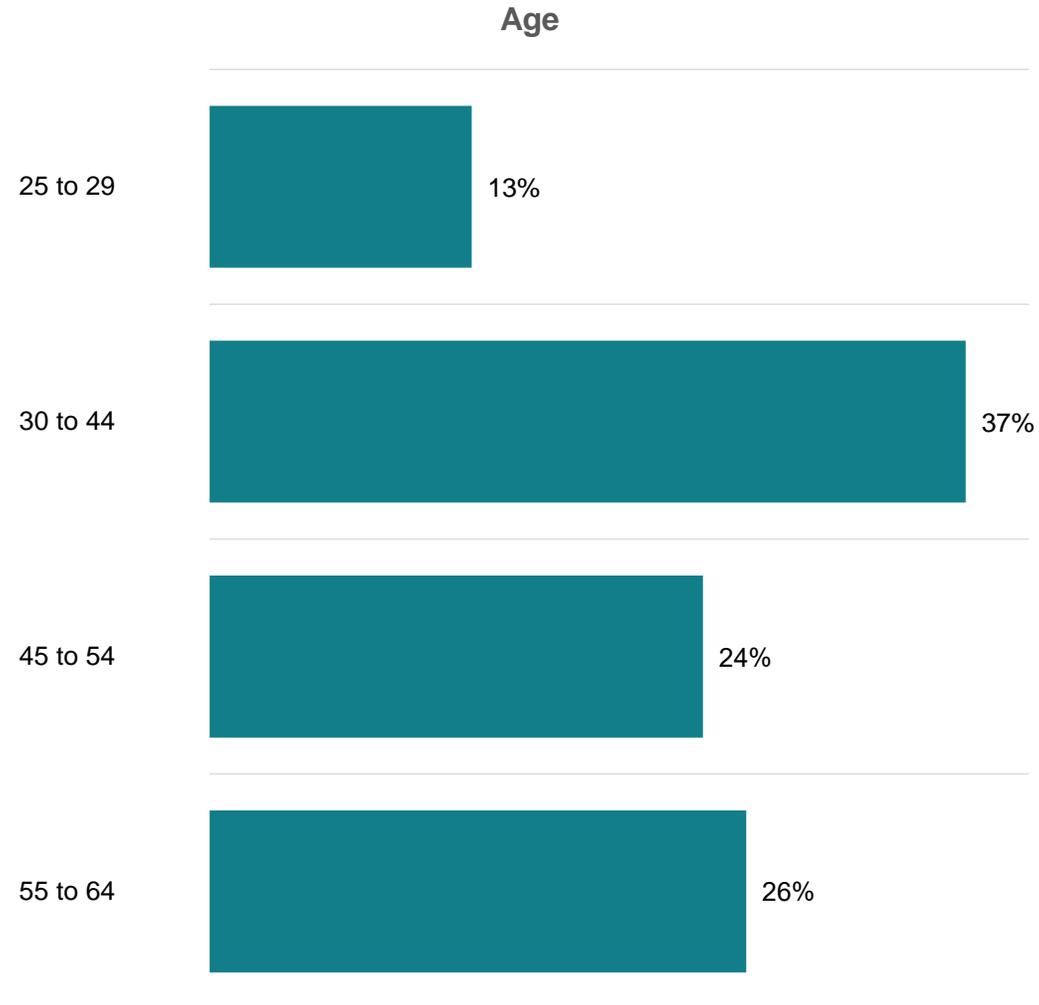
Women are more likely to travel with friends, while men prefer solo travel.

Planned Travel Companions



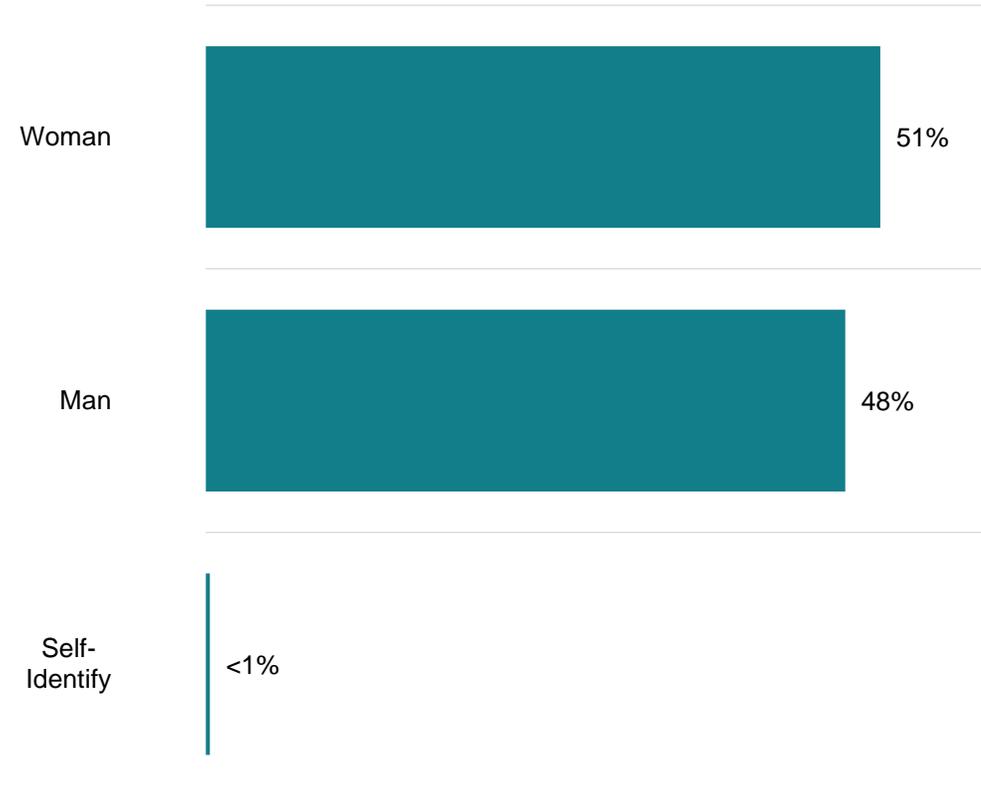
Q9. If you are planning to travel in Ontario in the next 12 months, who will you be travelling with? (Multi-select)
All Respondents. n=1372

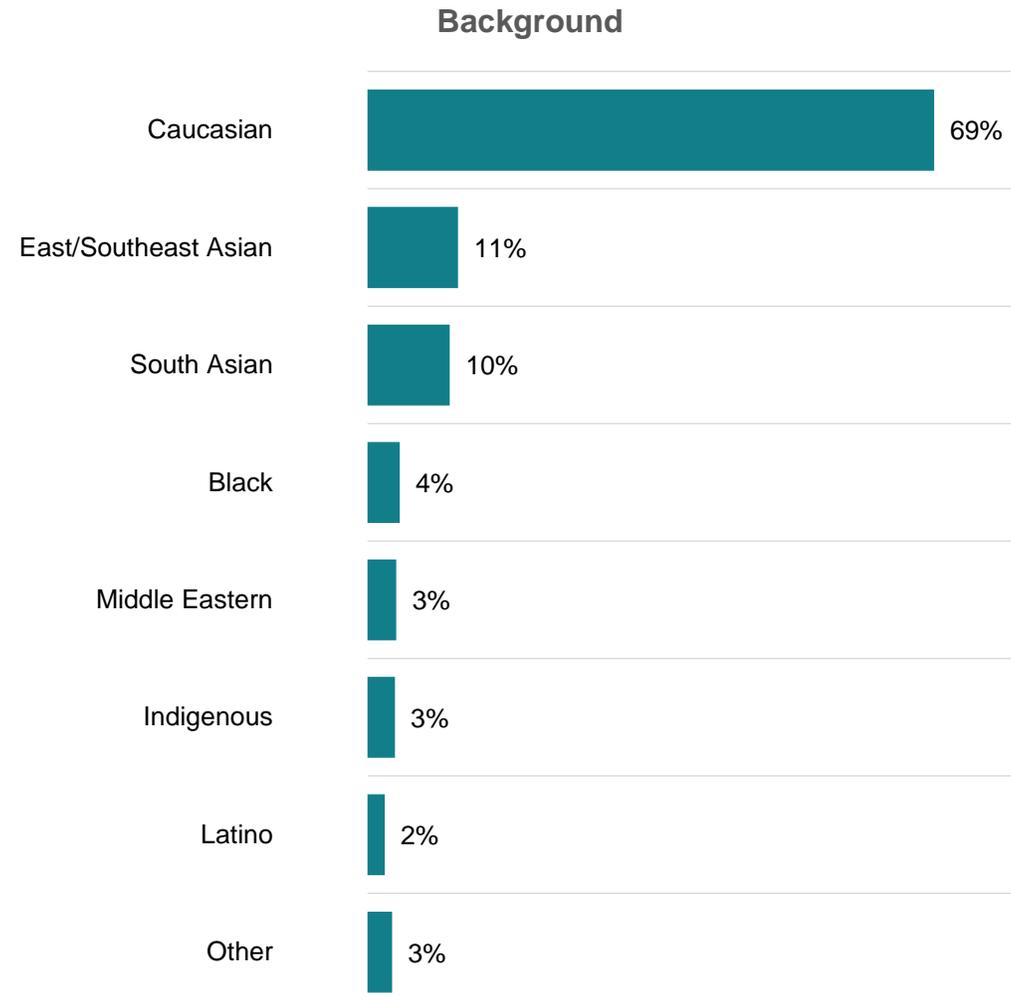
RESPONDENT PROFILE



SC1. Which category below includes your age: (Single-select)
All respondents. n=1600

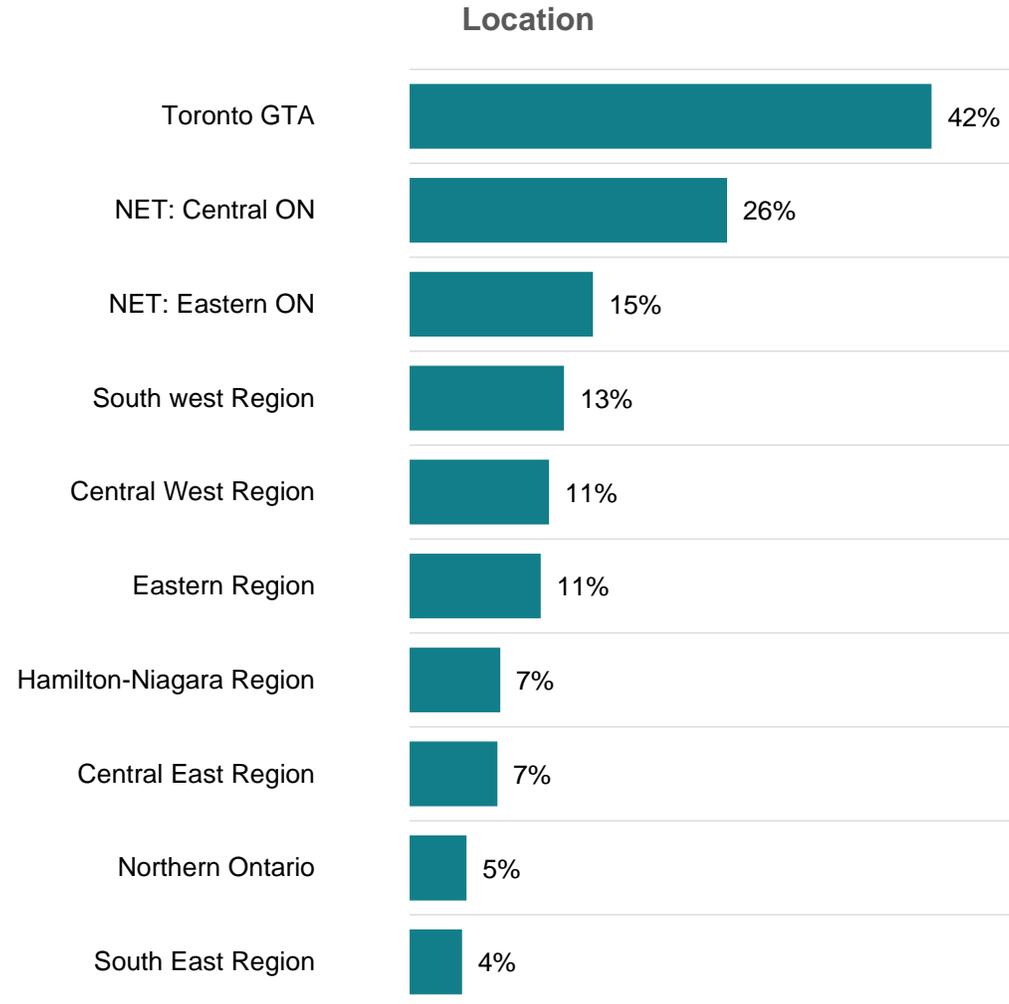
Gender





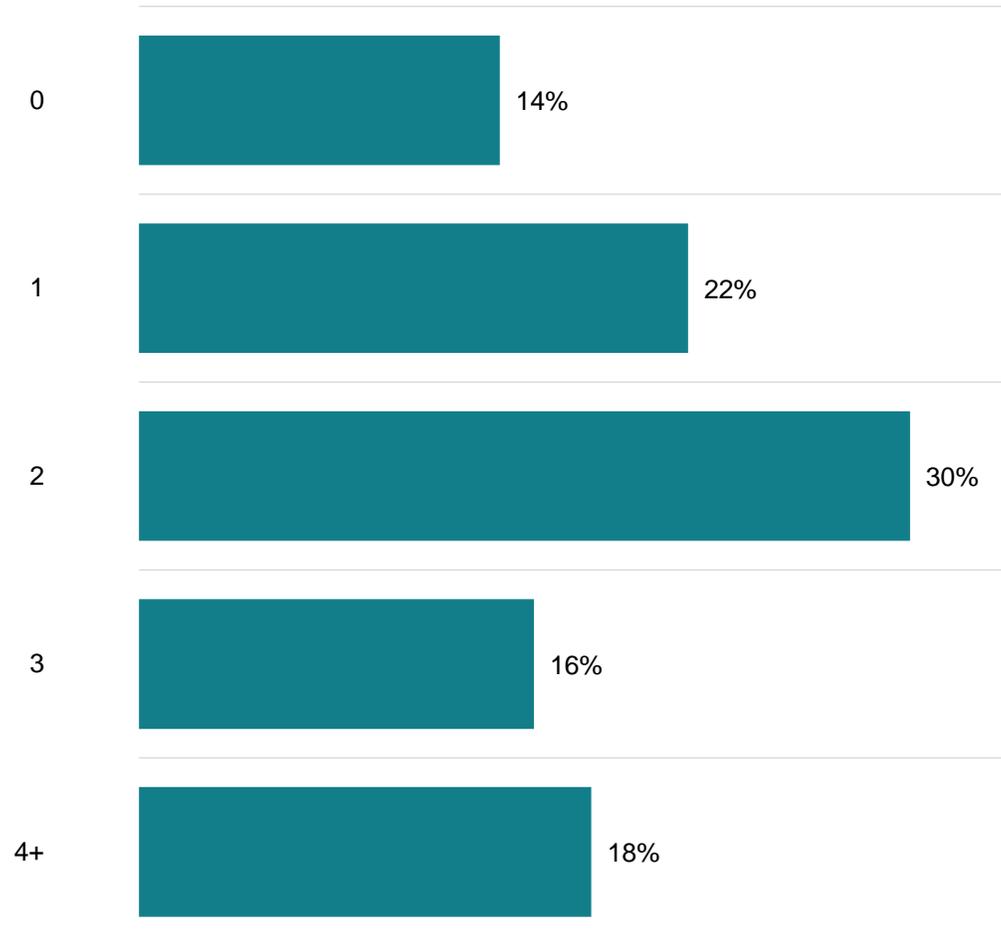
SC3 People living in Canada may have different ethnic or cultural origins or family backgrounds. Many Canadians identify themselves as belonging to multiple ethnic or cultural groups. With this in mind, please indicate which of these best describes your ethnic or cultural background. (Multi-select)

All respondents. n=1600



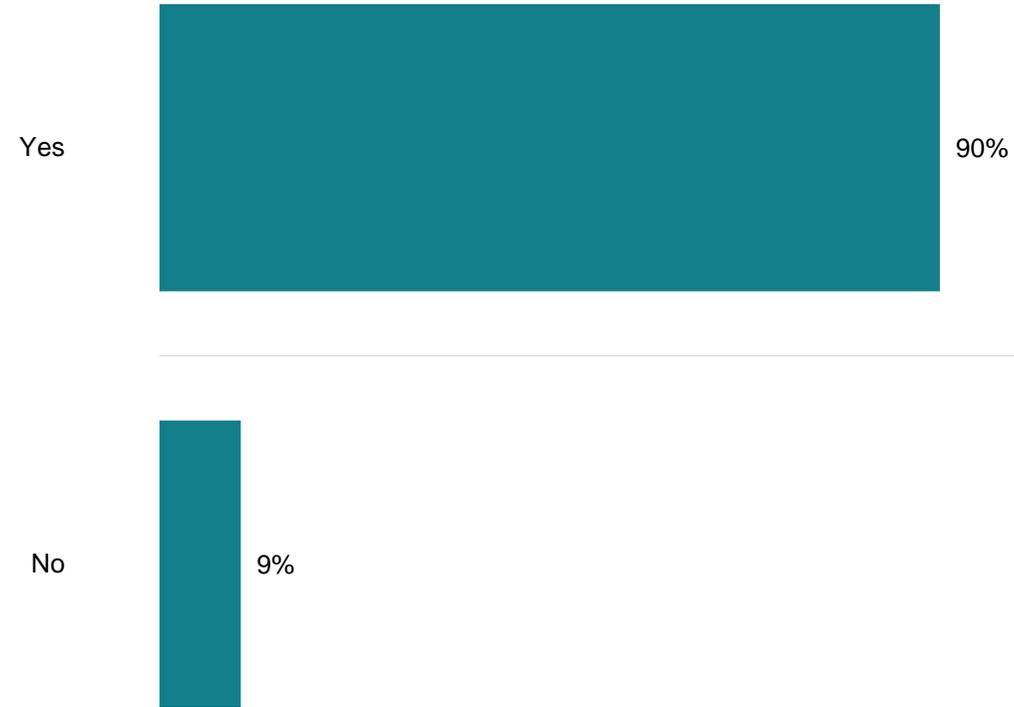
SC4 Which of the following regions of Ontario do you live in? (Single-select)
All respondents. n=1600

One or More Nights Trips To Ontario, Canada

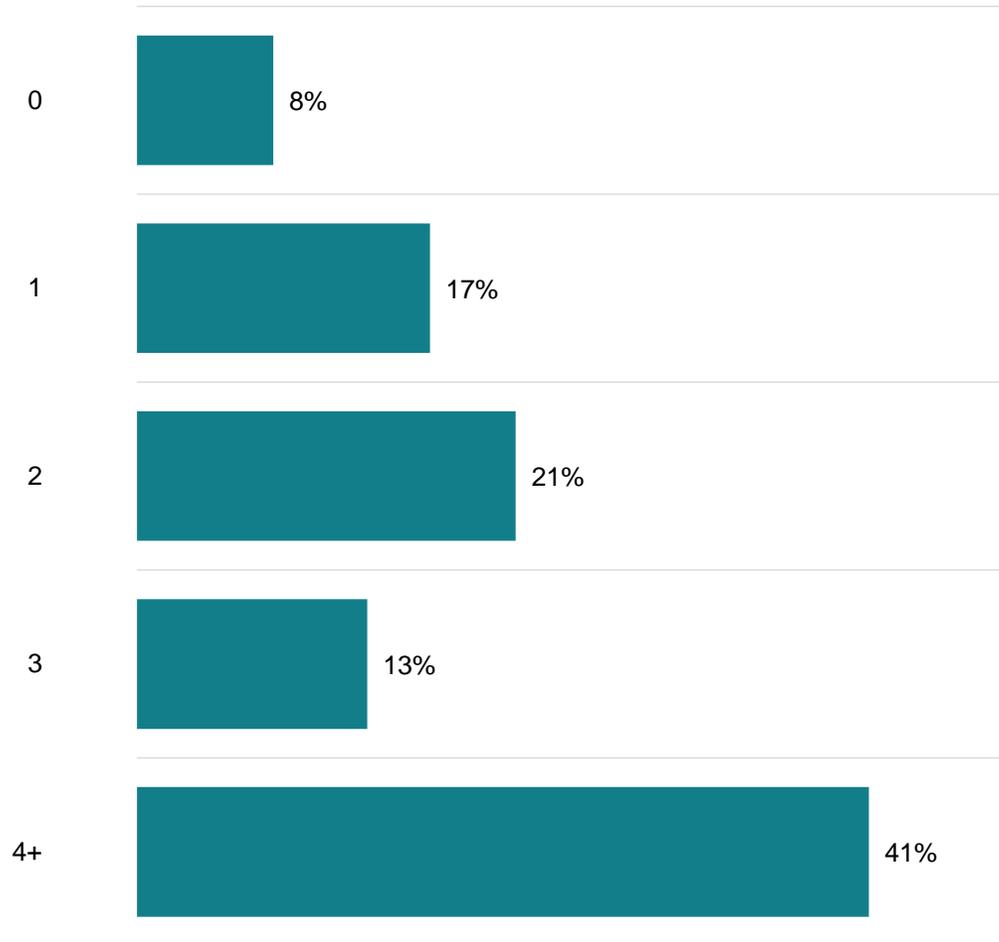


SC7. In the next 12 months, how many pleasure trips of one or more nights away from home are you planning to take within Ontario? (Open ended)
All respondents. n=1600

Pleasure Trips In Past 2 Years

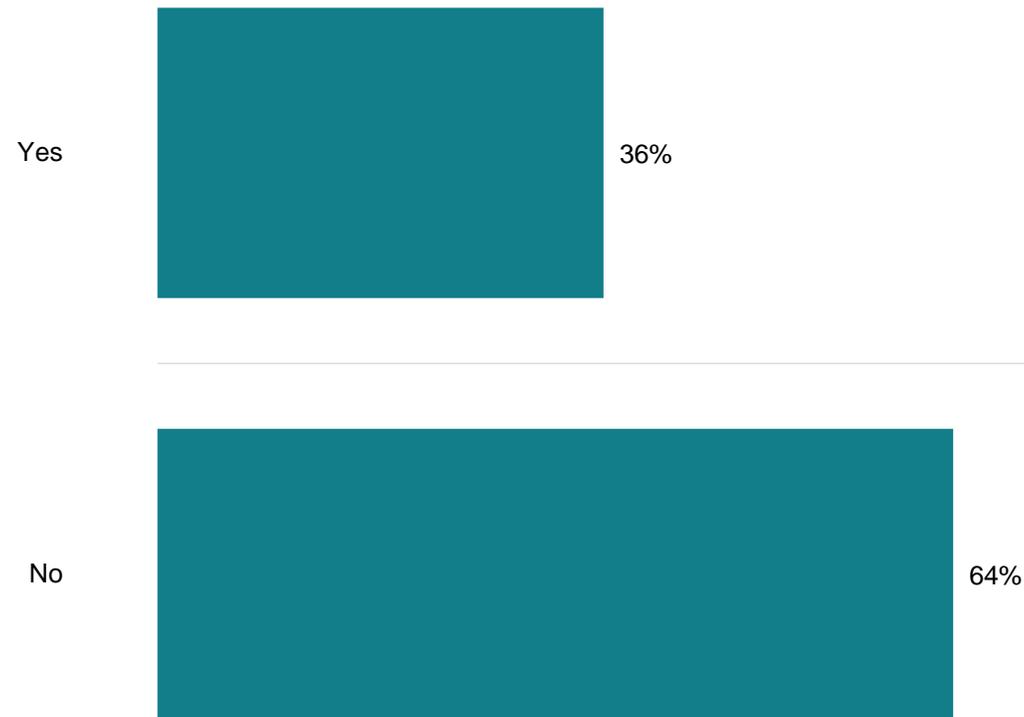


Day Trips To Ontario, Canada

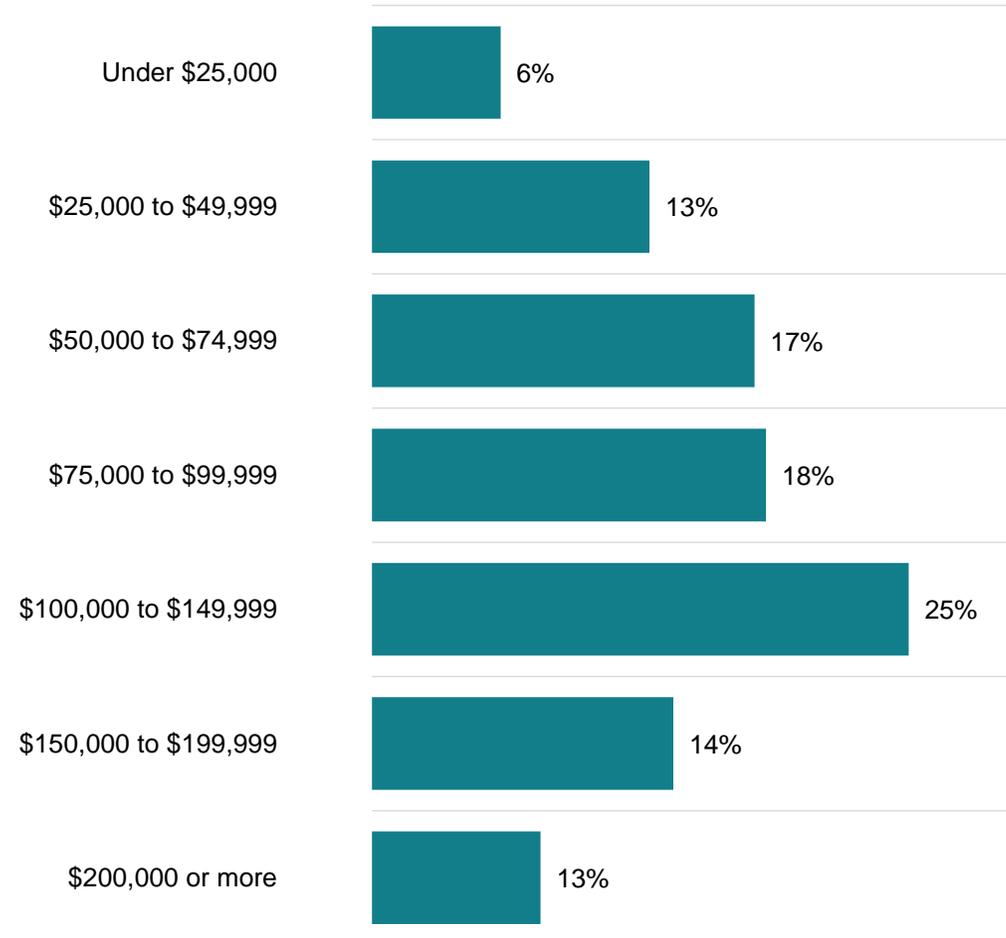


SC10. In the next 12 months, how many day trips are you planning to take within Ontario? (If 'None', type in '0') (Open ended)
All respondents. n=1600

Children In Household



Income Before Tax



D2. Which of the following best describes your household's total annual income before taxes? (Single-select)
All respondents. n=1600