



**CONTEXT IS EVERYTHING**

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

Prepared for: Ontario's Highlands Tourism  
Organization

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

## METHODOLOGY

### Methodology:

- CAWI (Computer-Assisted Web Interview)

### Overall Qualifying Criteria:

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

### Fieldwork Date:

- March 27<sup>th</sup> – April 18<sup>th</sup>, 2026

### Median Length of Interview:

- 15.8 minutes

### Partner Report Considerations:

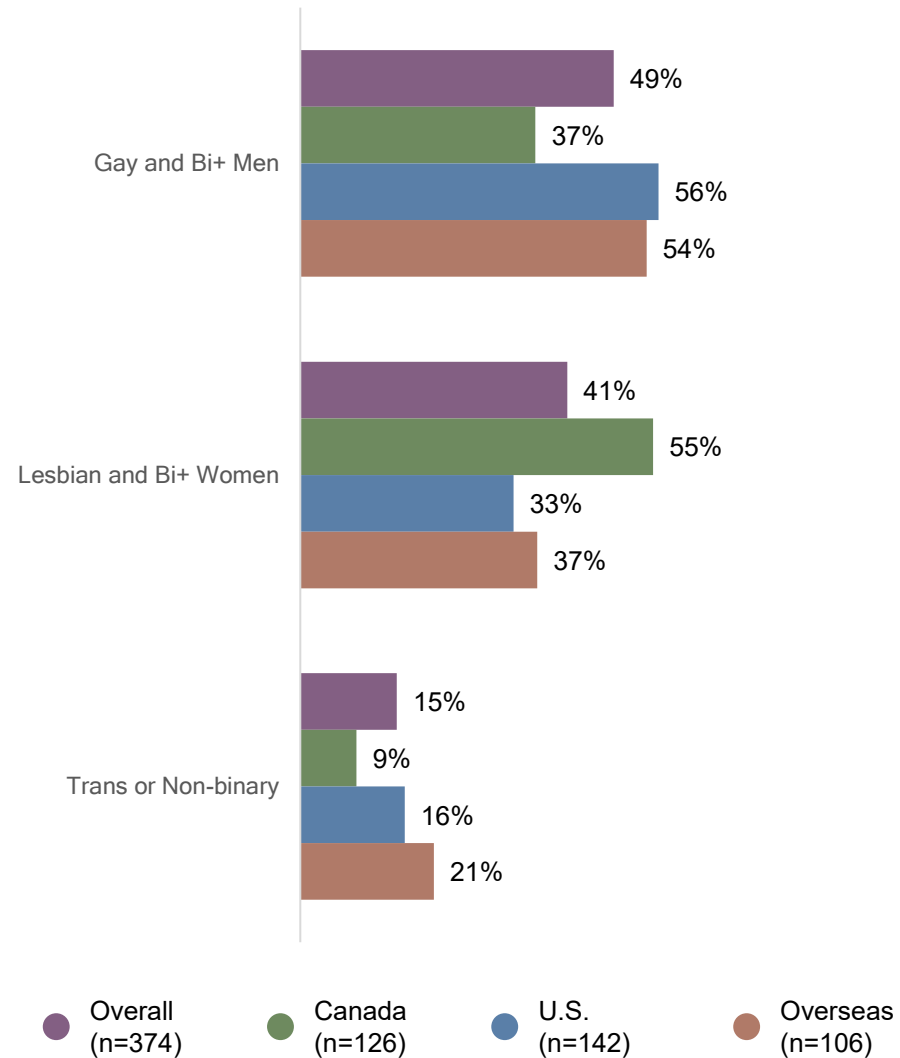
The results in this partner report are filtered to those who are likely to visit Ontario and aware of Ontario's Highlands.

# TRAVELLER IDENTITY

**Travellers aware of Ontario's Highlands are largely split between gay and bi+ men and lesbian and bi+ women, with meaningful variation by market.**

Gay and bi+ men make up roughly half of the overall audience aware of Ontario's Highlands, but this varies by market. U.S. travellers skew more heavily toward gay and bi+ men, while Canadian travellers show skew toward lesbian and bi+ women.

Trans or non-binary travellers represent a consistent share across all markets and are notably higher among overseas travellers.



SC4A Which of the following best describes your sexual orientation? (Multi-select)  
 SC4B Which of the following best describes your current gender identity? (Single-select)  
 SC4C Do you consider yourself to be transgender or trans? (Single-select)  
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Ontario's Highlands (n=374)

# ONTARIO TRIP PURPOSE

## Exploring 2SLGBTQI+ culture and natural scenery tie as the top motivators for visiting Ontario among travellers aware of Ontario's Highlands.

Exploring cities and neighbourhoods and enjoying natural scenery lead jointly at the top, followed closely by food and culinary experiences, attending Pride or 2SLGBTQI+-specific events, and travelling with friends or family. The breadth of motivators points to an audience seeking a full destination experience rather than a single-purpose trip.

Natural scenery and outdoor experiences ranking as a co-equal top motivator is particularly relevant for Ontario's Highlands.

Adventure and active travel registers more strongly here than in the broader Ontario trip purpose data, suggesting that travellers considering Ontario's Highlands have an above-average appetite for active and outdoor-based experiences.

## Main Reasons for Visiting Ontario



T2 What are the main reasons you would consider taking an overnight leisure trip in Ontario, Canada? Please select all that apply  
Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Ontario's Highlands (n=374)

# ONTARIO TRIP: PREFERRED MONTHS OF TRAVEL

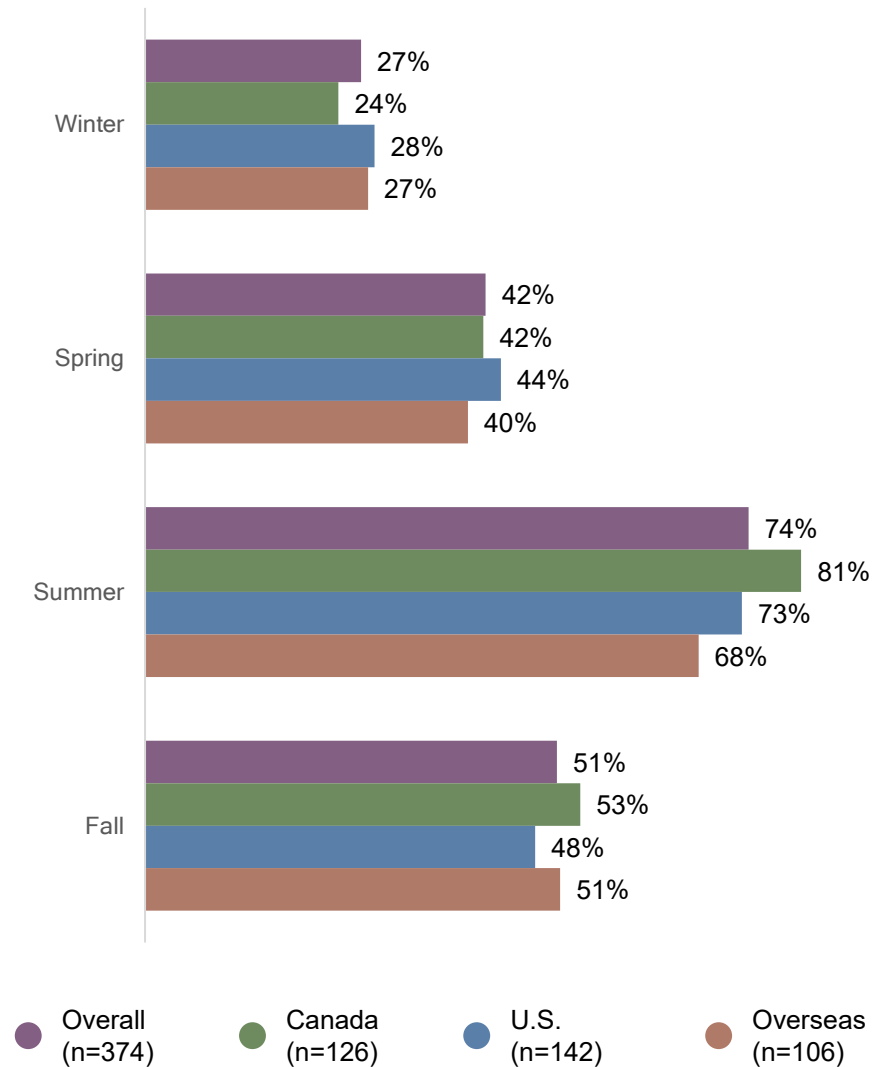
**Summer is the dominant travel window across all markets, but Ontario's Highlands benefits from stronger spring and fall interest than most other Ontario destinations.**

Canada skews most heavily toward summer, while overseas travellers show more distributed interest across the shoulder seasons.

Spring and fall both register meaningfully across all markets, with fall performing particularly well among Canadian and overseas travellers.

For a nature-focused destination like Ontario's Highlands, shoulder-season visitation is a realistic and commercially viable opportunity.

Winter interest is notably higher here than in comparable Ontario destination data, with roughly a quarter of travellers across all markets considering a winter trip.



T3 Which month(s) are you considering for an overnight leisure trip in Ontario, Canada? Please select all that apply  
 Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Ontario's Highlands (n=374)

# ONTARIO TRIP: ACCOMMODATION PREFERENCES

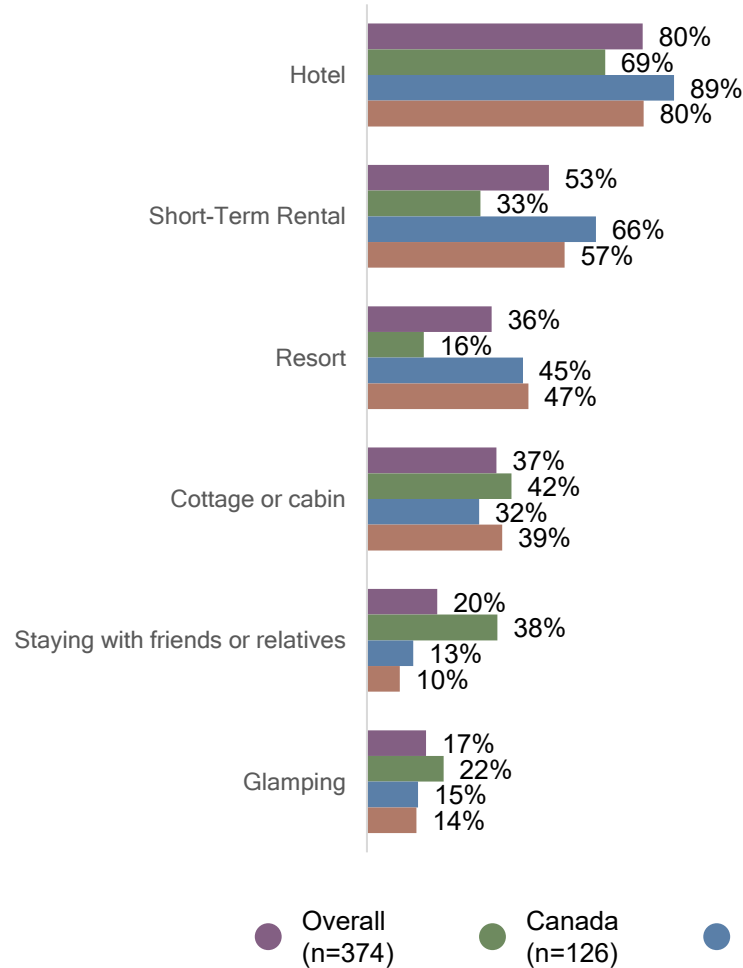
Hotels remain the dominant accommodation choice, but travellers aware of Ontario's Highlands show strong cottage, cabin, and resort interest.

Hotels lead across all markets, with U.S. travellers indexing highest.

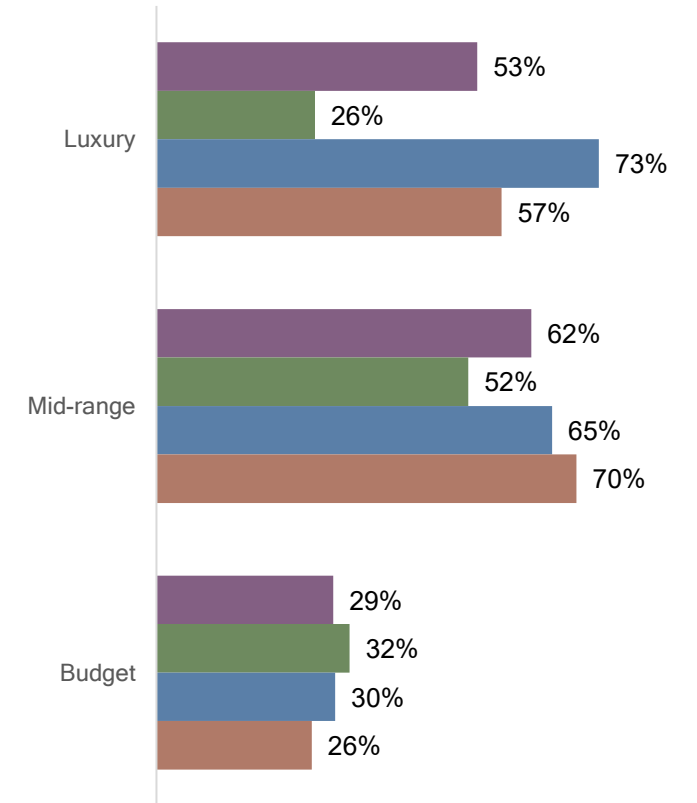
Cottages and cabins attract notably high interest here than in the broader Ontario accommodation data, with consistent selection across all markets.

This is directly relevant for Ontario's Highlands and points to a genuine demand signal for rural and lakeside accommodation product.

## Accommodation Type



## Luxury Preferences



T7 Where would you most likely stay on an overnight leisure trip in Ontario, Canada? Please select all that apply. Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Ontario's Highlands (n=374)

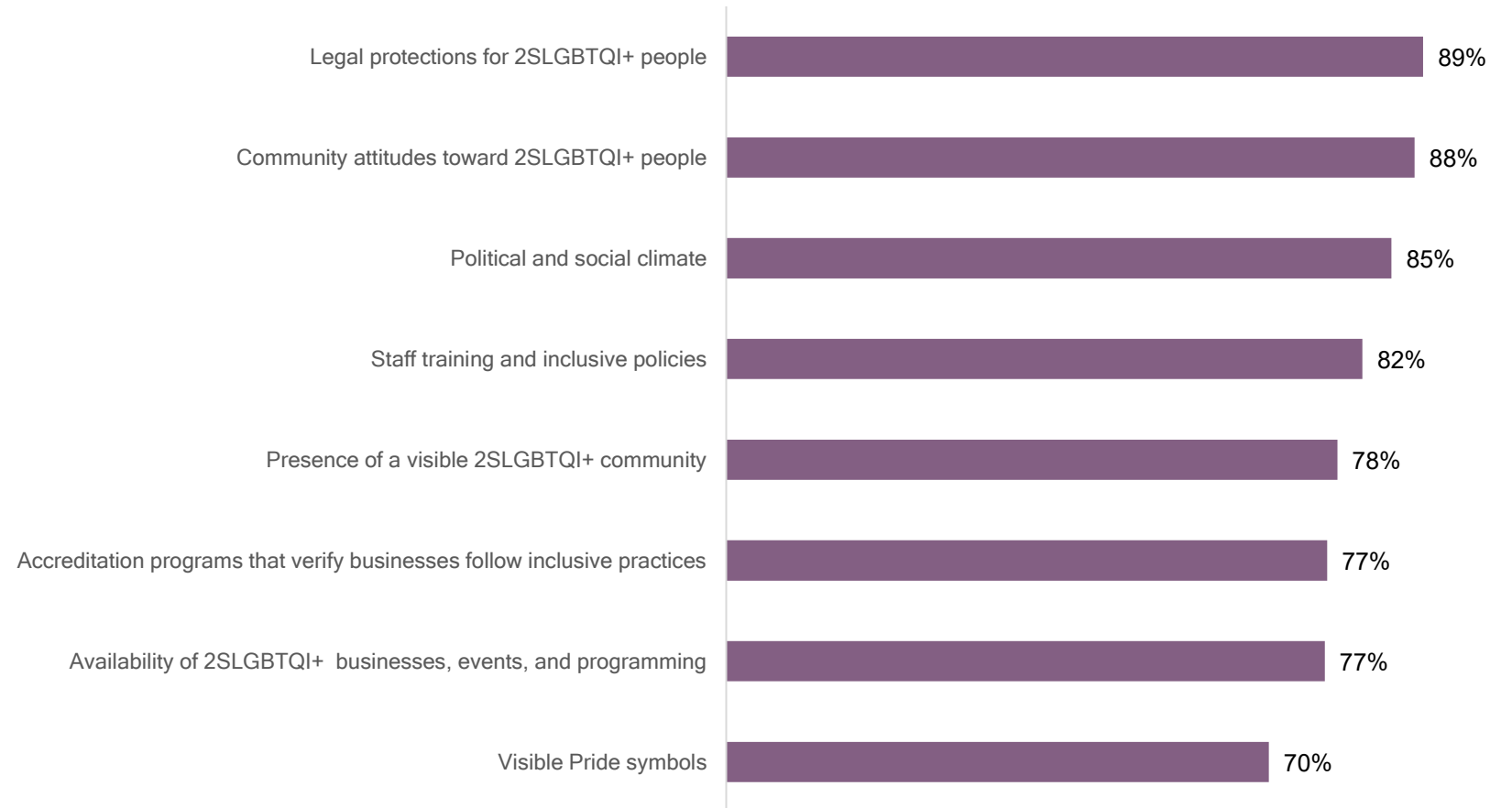
# WHAT INCLUSION SIGNALS MATTER MOST

**Among travellers aware of Ontario's Highlands, legal protections and community attitudes are the top inclusion signals, and the hierarchy between structural and operational signals is clear.**

Legal protections for 2SLGBTQI+ people and community attitudes toward 2SLGBTQI+ people rank highest among all signals tested, followed closely by political and social climate. These three structural signals sit comfortably above all operational ones, confirming that legal and social safety is the baseline requirement for this audience before any other factors come into play.

Notably, the gap between structural and operational signals is somewhat narrower here than in the broader study, staff training, visible community presence, accreditation, and availability of 2SLGBTQI+ businesses and events all rank closely together in the second tier.

## What Inclusion Signals Matter Most



S2 How important are the following when choosing a leisure travel destination?  
Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Ontario's Highlands (n=374)

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