CONTEXT IS EVERYTHING

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

Prepared for: Tourism Thunder Bay

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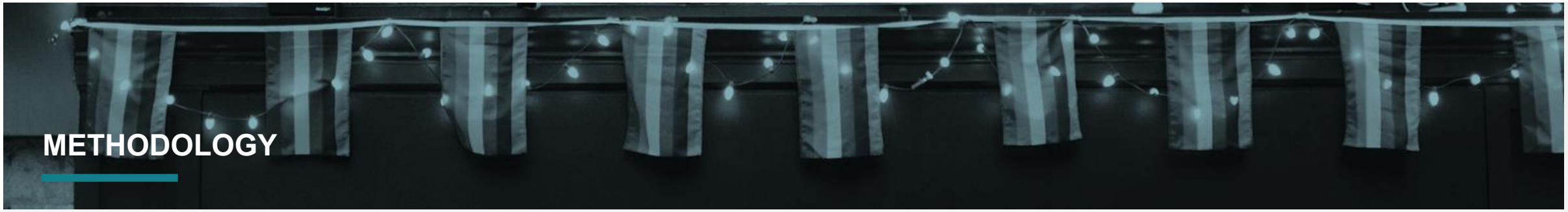


METHODOLOGY

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 27th – April 18th, 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 Thunder Bay.

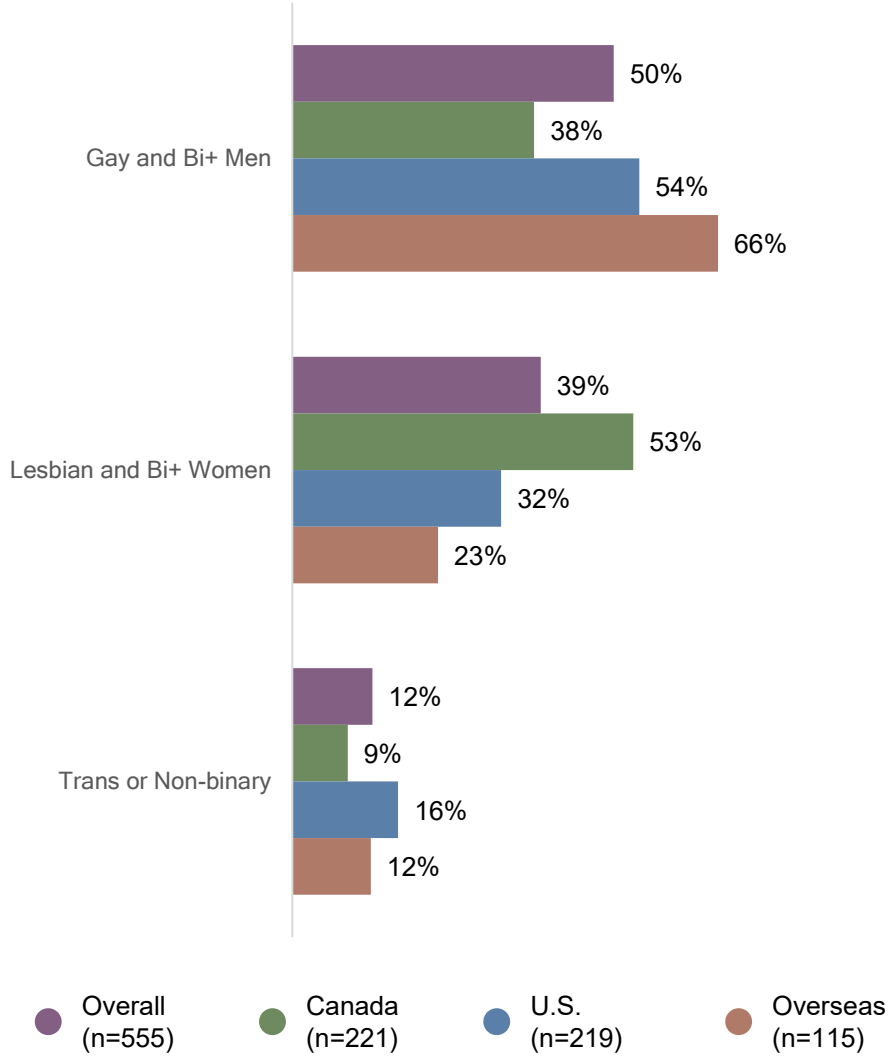
TRAVELLER IDENTITY

The identity composition of those aware of Thunder Bay varies considerably across geographies, with meaningful shifts across all three identity groups.

Gay and bi+ men account for half overall, but shift considerably by market — lowest among Canadian respondents and rising progressively among U.S. and overseas travellers, where they represent the clear majority.

Lesbian and bi+ women show the inverse pattern, with their strongest representation among Canadian respondents, while declining notably among overseas travellers.

Trans or non-binary respondents are broadly consistent with U.S. respondents showing modestly higher representation than any other market.



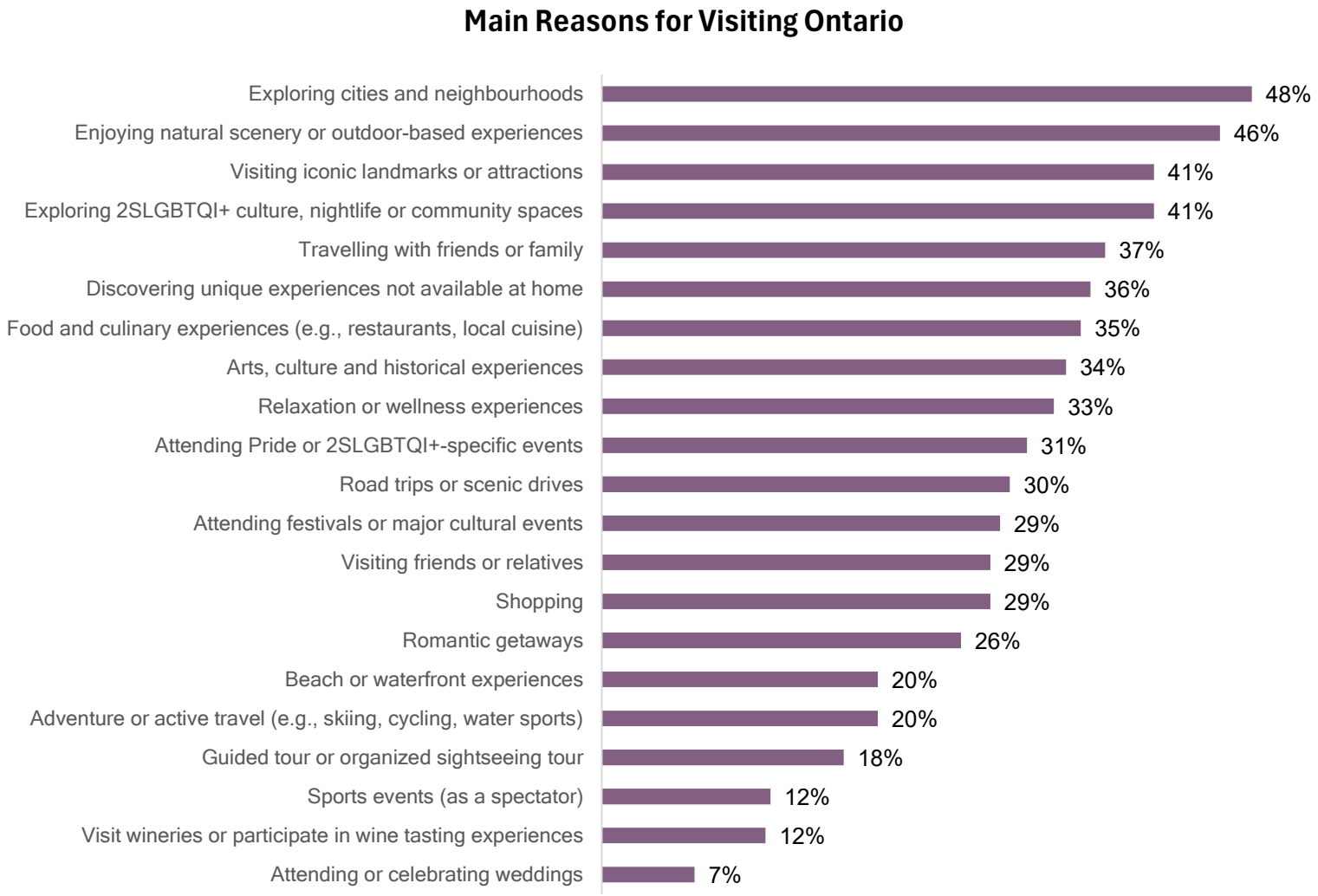
SC4A Which of the following best describes your sexual orientation? (Multi-select)
SC4B Which of the following best describes your current gender identity? (Single-select)
SC4C Do you consider yourself to be transgender or trans? (Single-select)
Respondents who are likely to take an overnight leisure trip in Ontario, Canada and aware of Thunder Bay (n=555)

ONTARIO TRIP PURPOSE

Exploring cities and neighbourhoods leads the list of Ontario trip motivations among those aware of Thunder Bay, with natural scenery following closely behind.

Iconic landmarks and 2SLGBTQI+ culture, nightlife, and community spaces rank in a near-tie further down, with travelling with friends or family, discovering unique experiences, and food and culinary experiences rounding out the upper range. This cluster of experiential and place-based motivations reflects a broad and consistent appetite across this audience rather than any single dominant driver.

Pride and 2SLGBTQI+-specific events, road trips, and festivals sit in the mid-range alongside visiting friends or relatives and shopping, reinforcing that Ontario's appeal rests on a combination of mainstream leisure strengths and identity-relevant experiences. Sports events, wineries, and weddings rounded out the bottom of the list when it came to reasons for visiting.



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 Thunder Bay (n=555)

ONTARIO TRIP: PREFERRED MONTHS OF TRAVEL

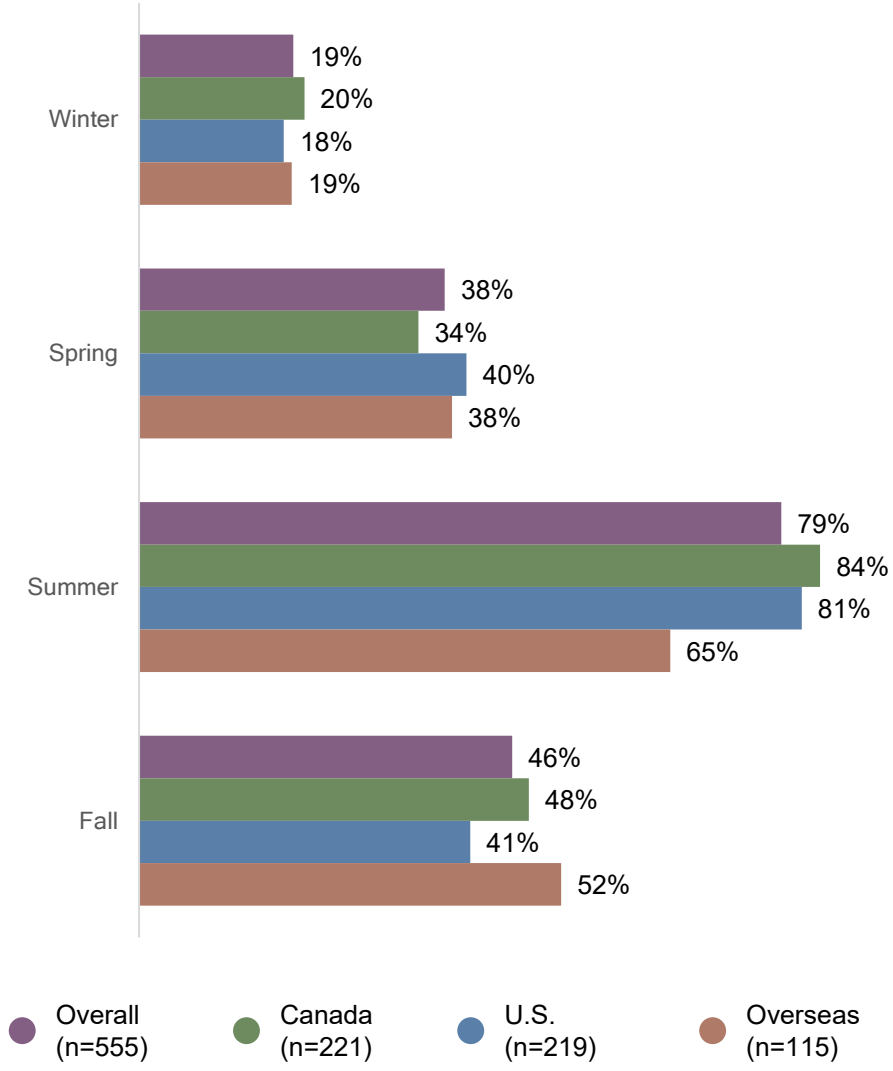
Summer travel to Ontario dominates across domestic and international markets.

2SLGBTQI+ travellers aware of Thunder Bay are actively considering trips to Ontario, with interest peaking in the summer across all key markets. Canadian respondents show the strongest summer consideration, followed closely by U.S. and then overseas travellers — where summer consideration trails the other markets more noticeably.

The consideration for fall is a secondary window, with overseas respondents leading ahead of Canada and the U.S.

Spring shows the reverse pattern, with U.S. respondents leading ahead of overseas and Canada.

Winter consideration is remarkably consistent across all three markets, sitting at broadly the same level.



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 Thunder Bay (n=555)

ONTARIO TRIP: ACCOMMODATION PREFERENCES

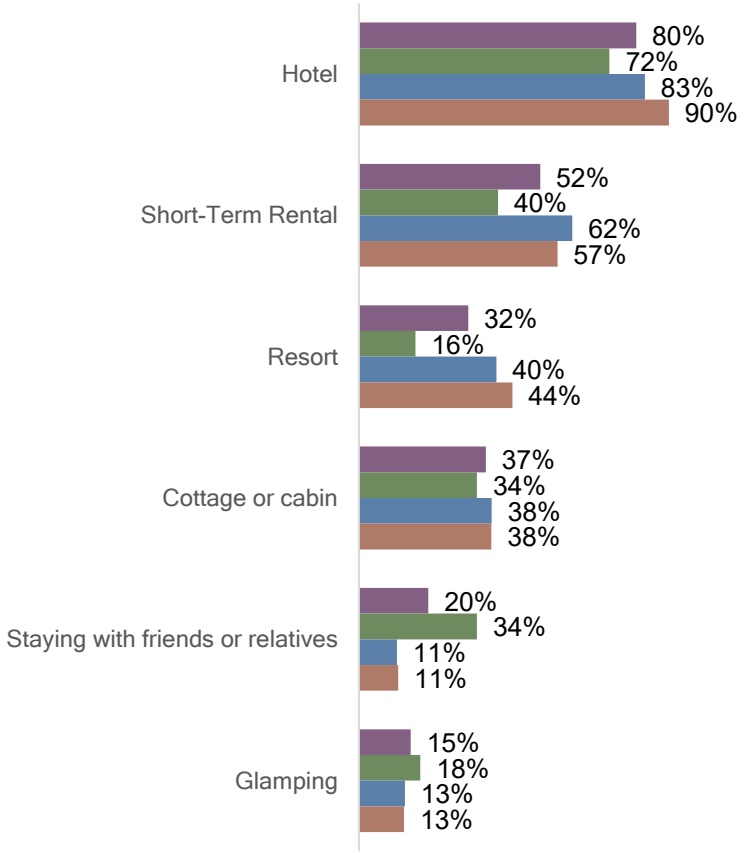
Hotels are the dominant accommodation choice across all markets, but meaningful differences emerge in tier preferences and alternative formats.

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

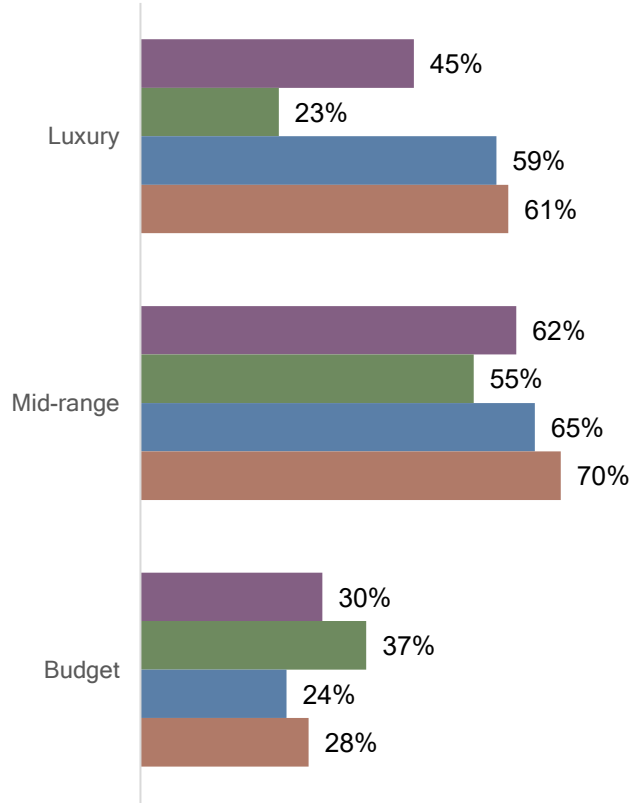
Within tier preferences, overseas and U.S. travellers show nearly identical luxury orientation, well above Canada, as domestic respondents index highest on budget. A distinctly Canadian pattern also emerges on staying with friends or relatives, where respondents are significantly more likely than either international market to choose this option.

Cottages and cabins attract broadly consistent interest across all markets, pointing to a viable rural 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 Thunder Bay (n=555)

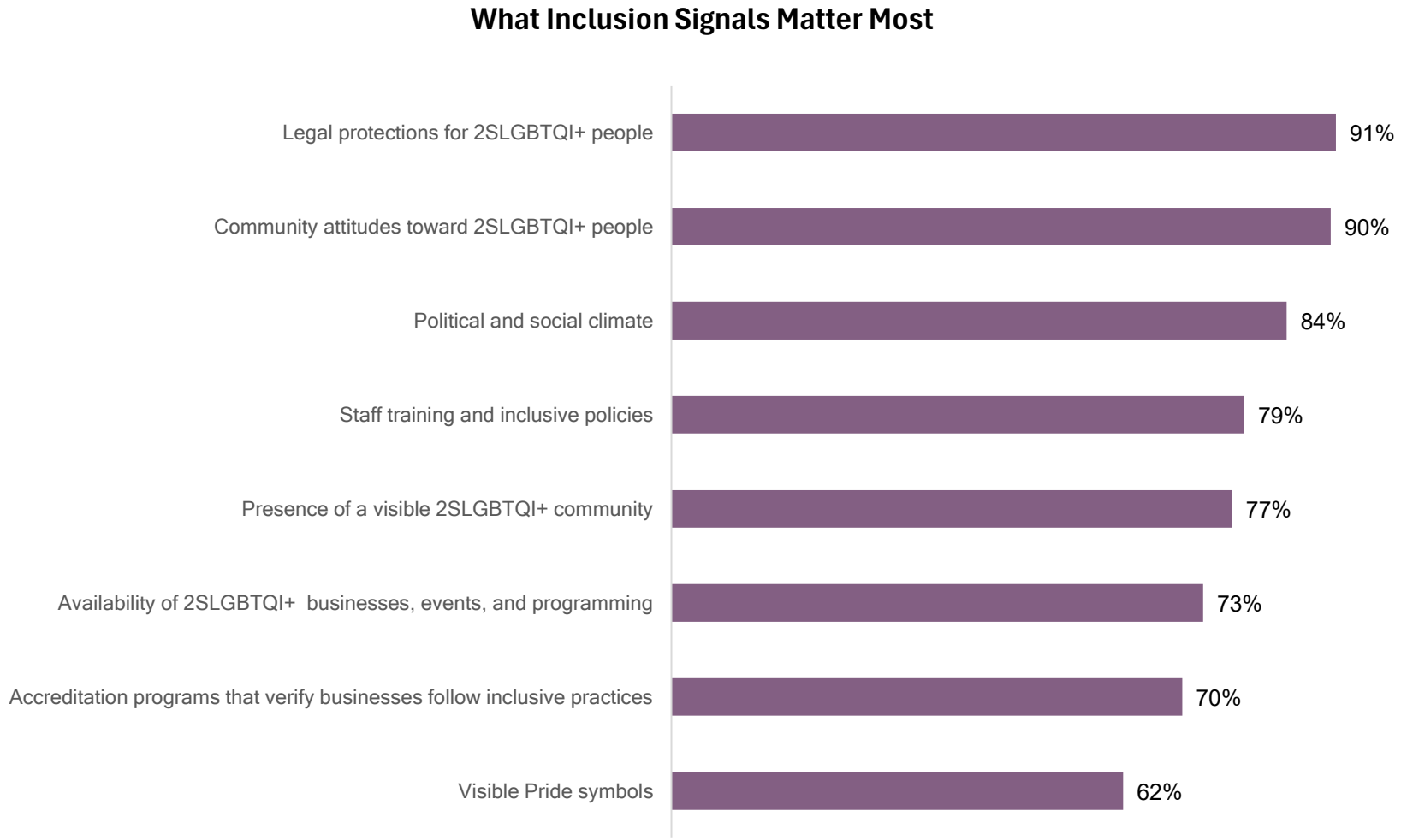
WHAT INCLUSION SIGNALS MATTER MOST

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

Structural factors are most important. Legal protections, community attitudes, and political and social climate sit at the top of the ranking across all markets and identity groups.

Operational signals form a second tier, with visible Pride symbols ranking last among the eight signals tested.

Travellers who find community attitudes, visible community presence, and accreditation programs important are considerably more likely to be considering Ontario than those who do not. Despite ranking seventh overall, accreditation emerges as one of the strongest drivers of consideration.



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 Thunder Bay (n=555)

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