



Spring 2025

Travel Industry Council of Ontario

Research of Ontario travel consumers

Background and Methodology

PMG Intelligence was contracted to conduct a pulse check with consumers. The main objectives of the Spring 2025 survey were to explore consumer attitudes and behaviours towards travel in 2025 and to measure the value of TICO. Where available, tracking to prior waves is shown.

The research employed a quantitative research model with an online market survey.

Field dates	May 2025
Sample size	n=614
Margin of Error (at 95% confidence interval)	+/- 4.0%
Sample population	Ontarians

The entire research process was executed by PMG Intelligence, an Ontario-based market research and data science company.



What did we learn?

The key findings you need to know

Quick Facts

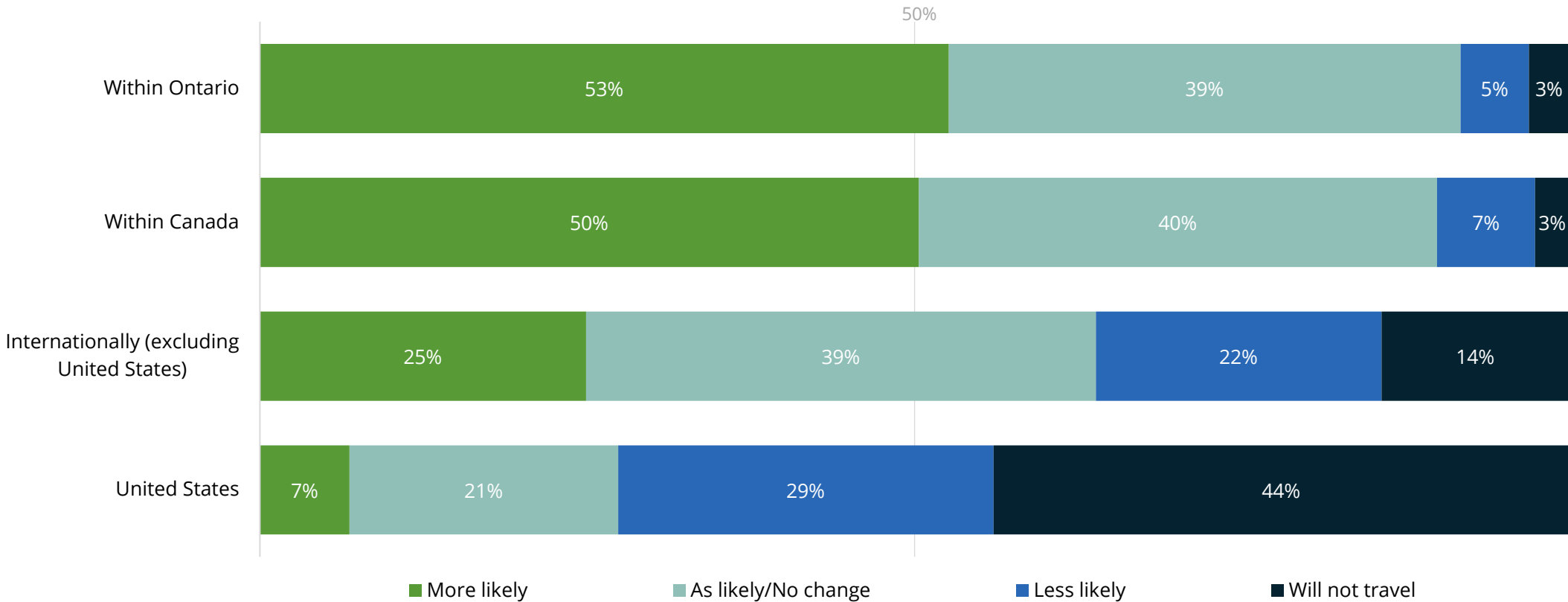
Highlights from the research

- About half of Ontarians are more likely to travel within Ontario or Canada in 2025. **More than 2-in-5 will not travel to the U.S.**
- **Nearly 3-in-5 note the positions taken by the U.S. administration are having a significant impact on their travel decisions**, followed by the impact of tariffs on the economy.
- **2-in-5 have delayed travel to their U.S. or changed destinations** because of the uncertainty around the economy, tariffs, and/or geo-political circumstances. Just 1-in-6 are continuing their U.S. travel bookings as planned.
- **Just 1-in-3 are confident or very confident their travels will go as expected** during this period of heightened uncertainty. 1-in-4 are not very or not at all confident.
- 72% of Ontarians typically travel between one and three times/year. **Compared to last year, about half expect to make the same number of trips, while about 1-in-4 expect to travel but have fewer trips.** About 3-in-5 expect their travel duration to be about the same as last year. Half expect to spend about the same on travel as last year, with 22% expecting to spend more and 20% expecting to spend less.
- **2-in-3 respondents feel it is “critical” or “important” that the travel agency they are booking through is regulated**, including nearly 3-in-10 who feel it is “critical”. This is somewhat lower than the more than 4-in-5 who felt it critical or important.
- **3-in-4 feel TICO is valuable to them as a travel consumer, similar to prior waves.** When booking travel, about 2-in-3 respondents are likely to purchase travel insurance and to book with flexible change/cancellation policies. Nearly have are likely to book with a travel agent.

Detailed findings

Intentions for travel

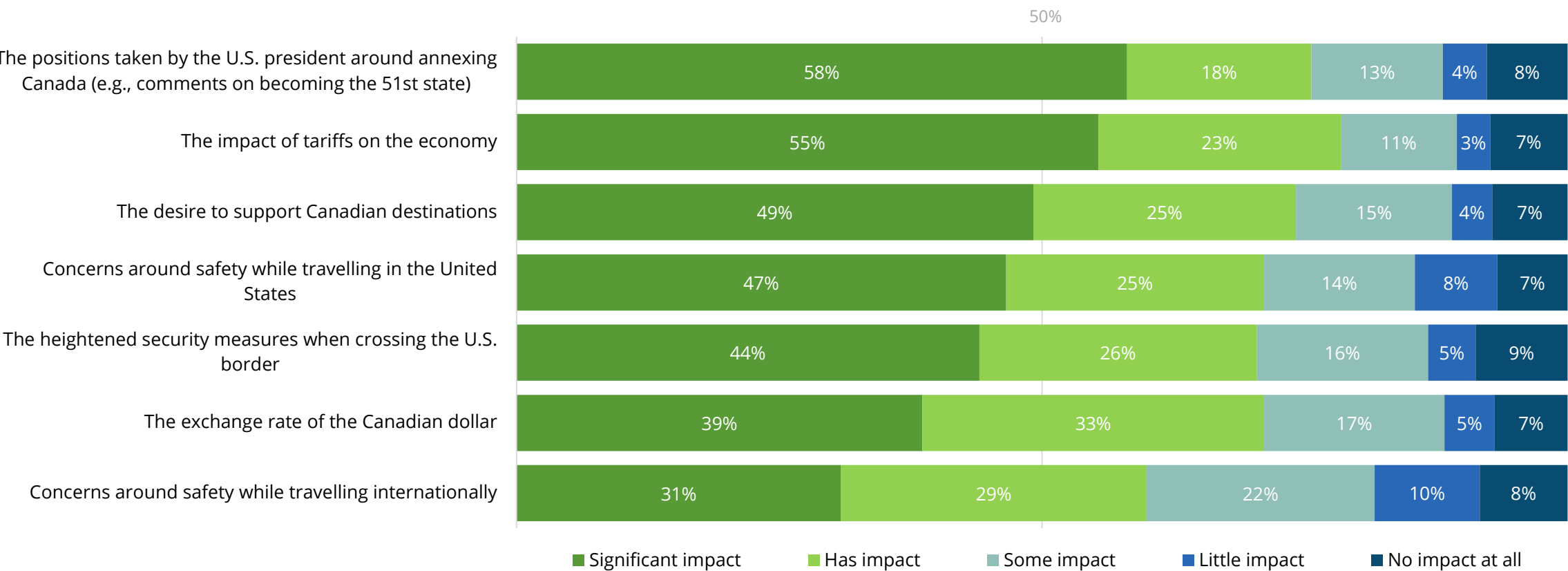
About half are more likely to travel within Ontario or Canada in 2025.
More than 2-in-5 will not travel to the US.



Question: We would like to understand how your travel preferences may have changed in 2025. Please indicate whether you are more likely, less likely, or as likely to travel to (or within) the following destinations.

Influencing the travel decision

Nearly 3-in-5 note the positions taken by the US president are having a significant impact on their travel decisions, followed by the impact of tariffs on the economy.



Question: To what extent do the following influence your travel decisions?

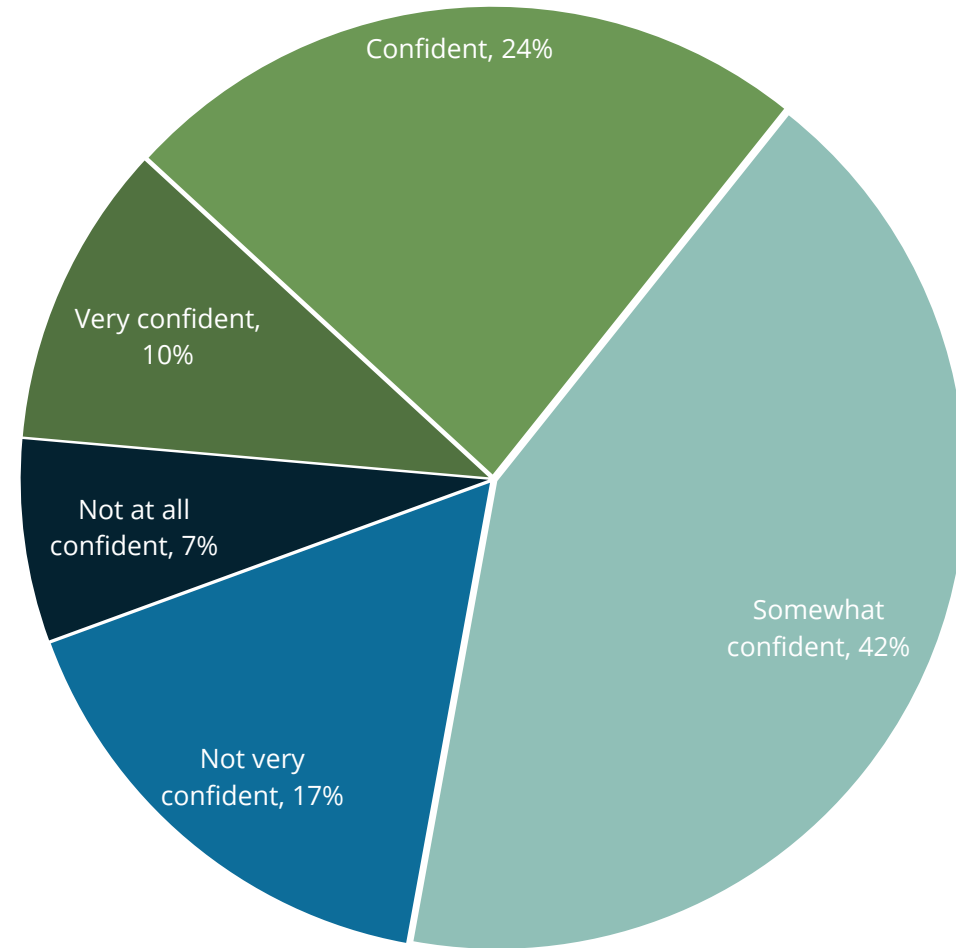
Confidence in travel going as planned

Just 1-in-3

are confident or very confident their travels will go as expected during this period of heightened uncertainty.

1-in-4

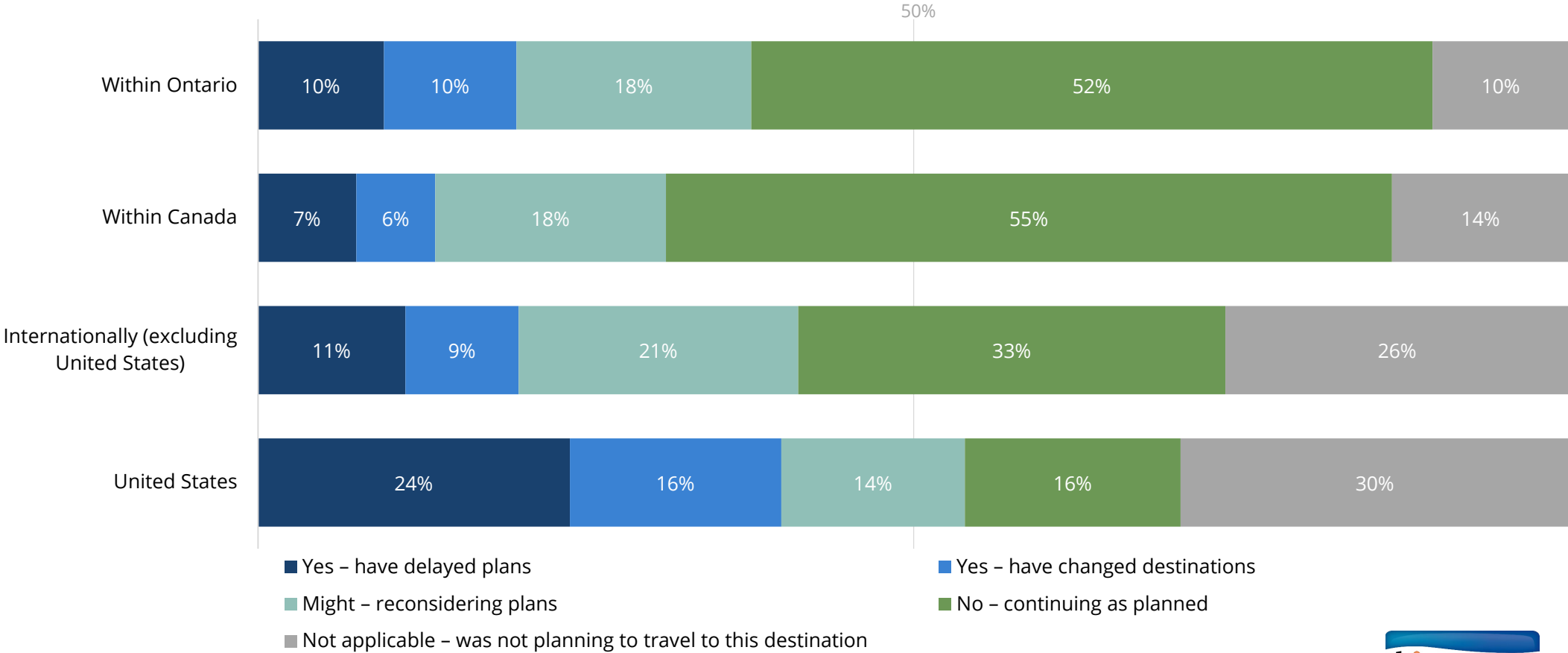
are not very or not at all confident.



Question: How would you rate your overall confidence in your travels going as expected during this period of heightened uncertainty?

Delaying or reconsidering travel

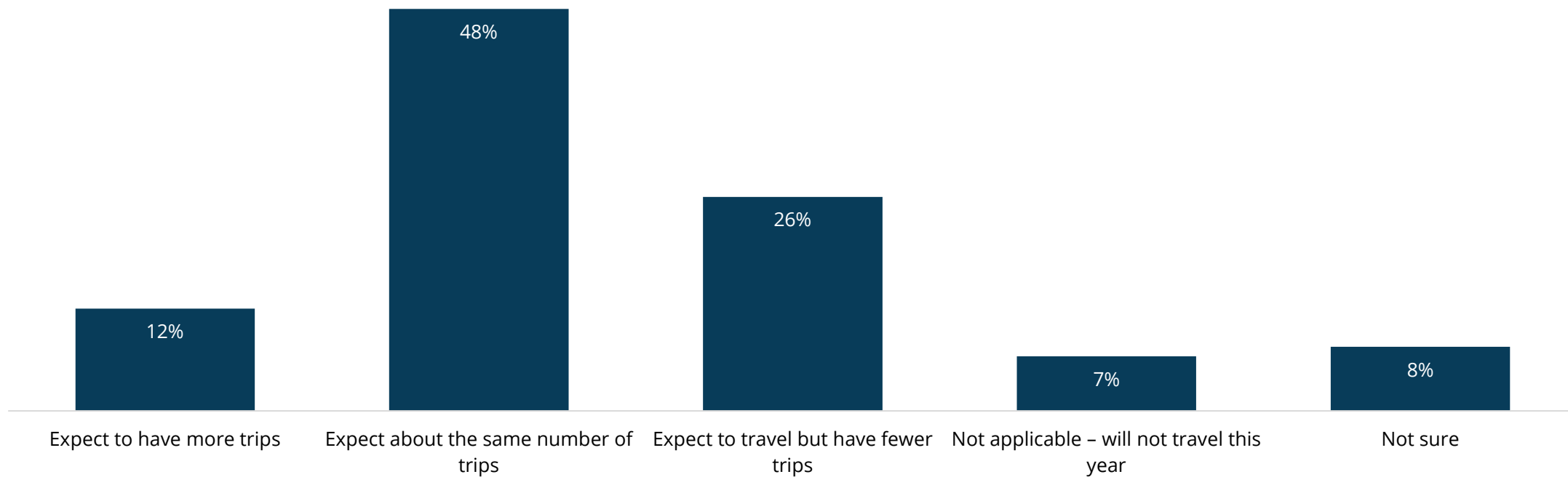
2-in-5 have delayed travel to their US or changed destinations because of the uncertainty around the economy, tariffs, and/or geo-political circumstances. Just 1-in-6 are continuing their US travel bookings as planned.



Question: Are you delaying or reconsidering booking travel because of the uncertainty around the economy, tariffs, and/or geo-political circumstances?

Planned number of trips

Compared to last year, about half of respondents expect to make the same number of trips, while about 1-in-4 expect to travel but have fewer trips.

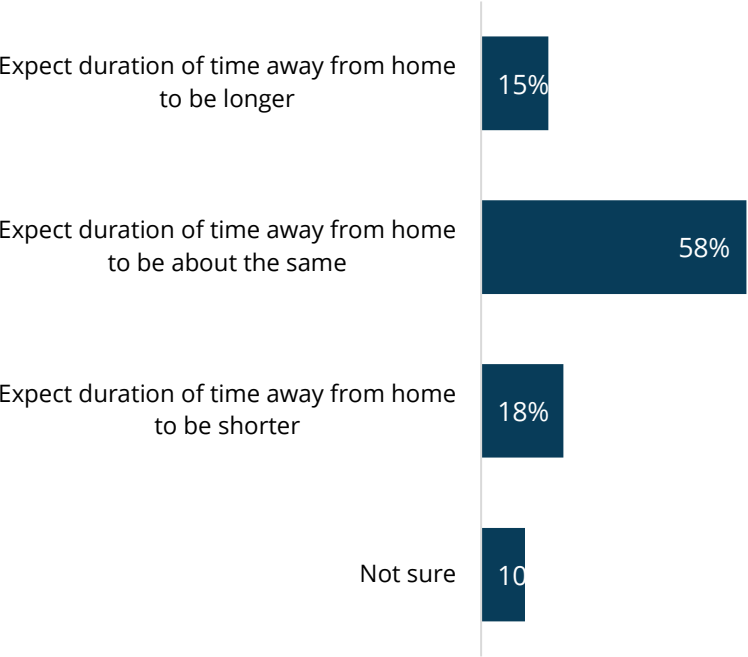


Question: Compared to last year, how many trips do you expect to make this year?

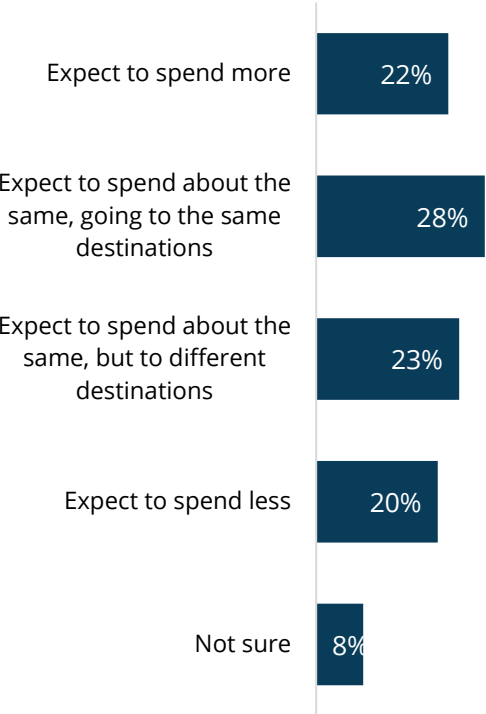
Planned duration and travel spend

About 3-in-5 expect their travel duration to be about the same as last year.
Half expect to spend about the same on travel as last year, with 22% expecting to spend more and 20% expecting to spend less.

Travel duration

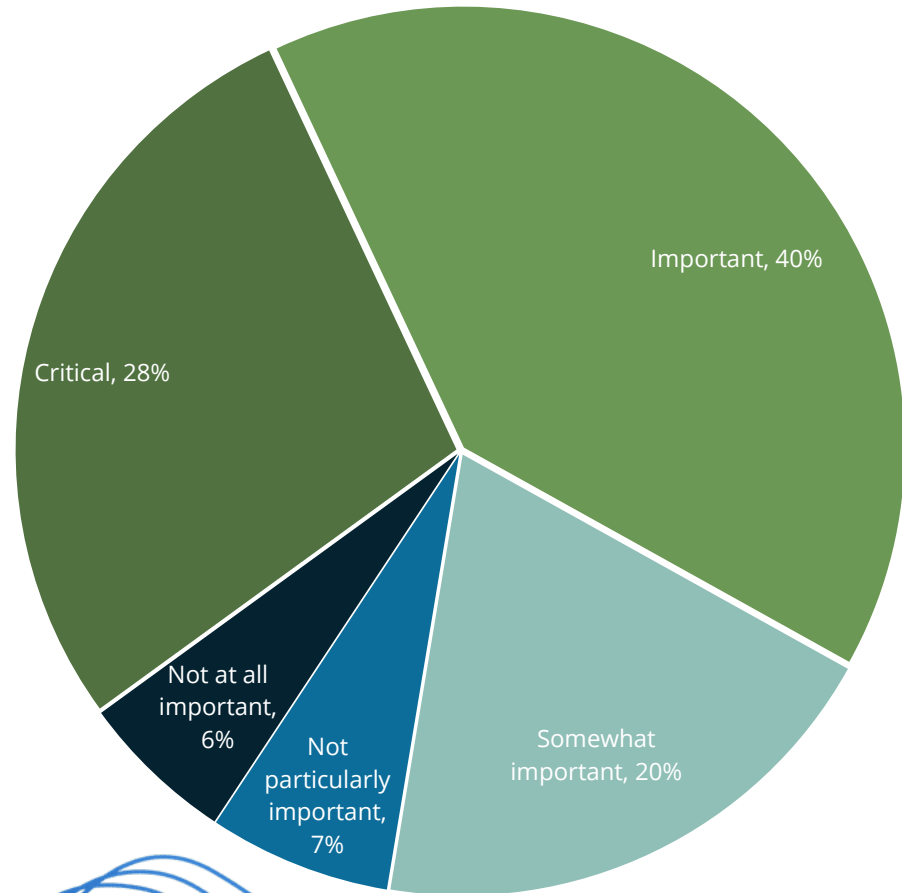


Travel spending



Question: [IF TRAVELLING] Compared to last year, how long do you expect to be away from home this year?
Question: [IF TRAVELLING] Compared to last year, how much are you expecting to spend on travel this year?

Importance that travel agency is regulated



2-in-3 respondents feel it is “critical” or “important” that the travel agency they are booking through is regulated, including nearly 3-in-10 who feel it is “critical”.

Question: How important to you is it that the travel agency (whether online or in-person) you are booking through is regulated?

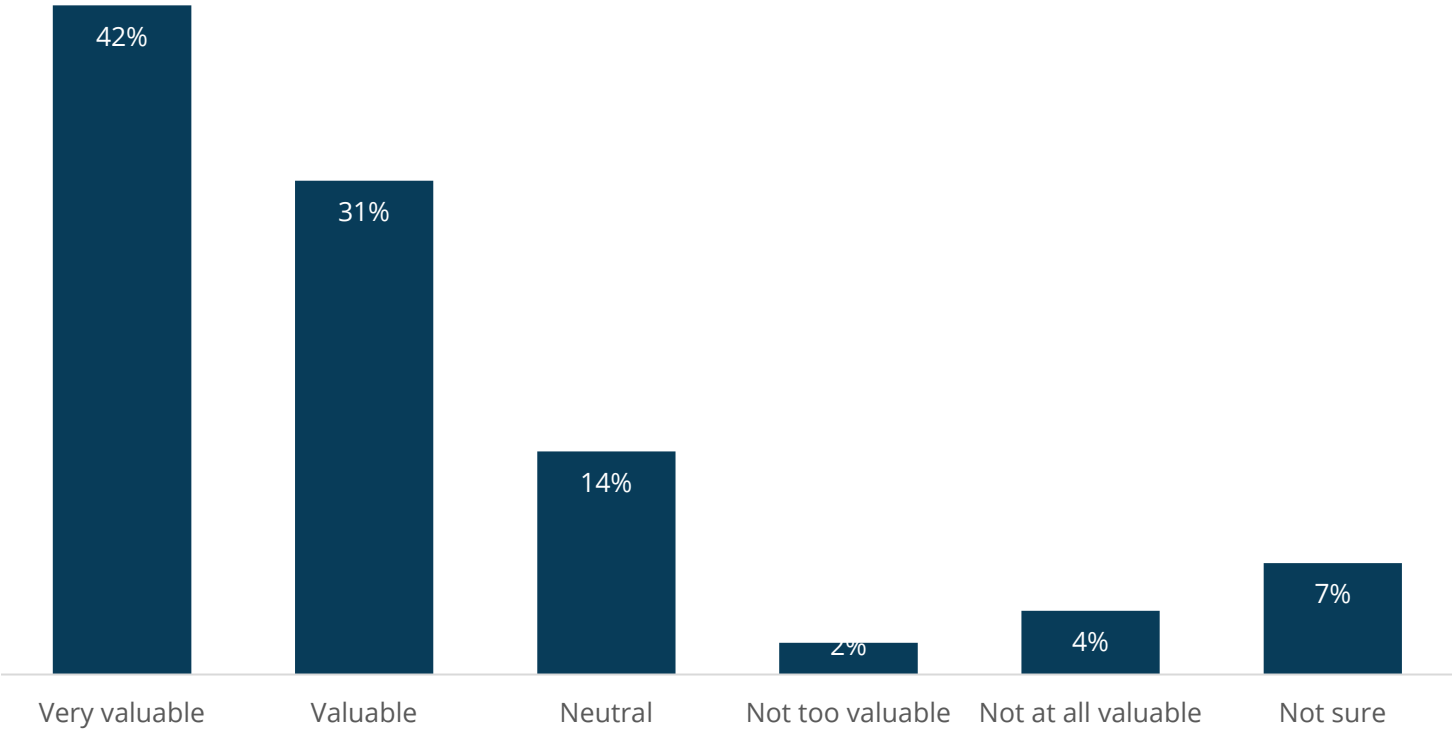
Perceived value of TICO

3-in-4 feel TICO is valuable to them as a travel consumer.

ALL RESPONDENTS WERE PROVIDED THE FOLLOWING DESCRIPTION TO REVIEW:

The Travel Industry Council of Ontario (TICO) is a regulatory body and consumer protection agency that oversees travel agencies and tour operators on behalf of the Ontario government. TICO enforces the laws that all travel agencies and tour operators in Ontario must follow. TICO handles consumer complaints against travel agencies and tour operators and administers a Compensation Fund for travellers.

All travel agencies, websites, and tour operators with a physical presence in Ontario must, by law, be registered with TICO.



Question: Based on what you know/just read about TICO and its services, how valuable is TICO to you as a travel consumer?

Booking preferences

When booking travel, about 2-in-3 respondents are likely to purchase travel insurance and/or to book with flexible change/cancellation policies. Nearly half are likely to book with a travel agent.

