DESTINATION
NORTHERN
ONTARIO

Destination Northern Ontario Traveller Insights

destinationnorthernontario.ca

A Skift Report

DISCLAIMER

For more information, please contact:

Oliver Martin
Director: Innovation
+1 416 721 3544
om@skift.com

Pierre Coetzee
Chief Methodologist
+27 79 566 7188
pc@skift.com

Skift Inc.
www.skift.com

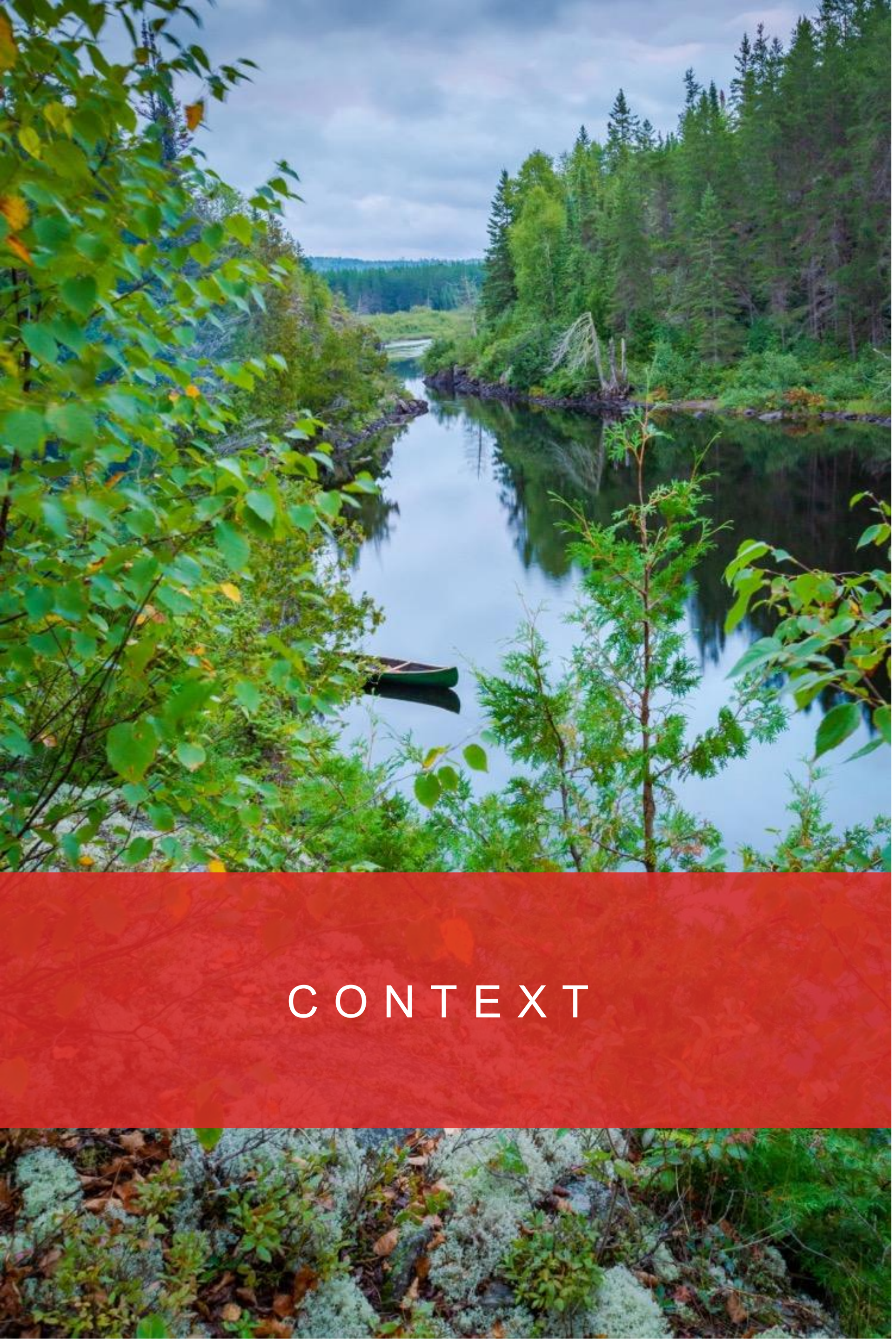
The findings reported herein are provided to Destination Northern Ontario, i.e., ‘the client’. The Client is free to use the findings in whatever manner it chooses, including releasing them to their travel and tourism industry stakeholders and partners and/or media.

Skift subscribes to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for primary research studies that are released to the public or the media.

The purpose is to maintain the integrity of market research analysis by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

May 2025

Contents



CONTEXT

Understanding Northern Ontario’s Future Consumer

Destination Northern Ontario (DNO) previously conducted a research project to analyze the priority products within the Northern Ontario tourism industry, focusing on key segments to guide product development and marketing strategies in the coming years.

In response to changes in the tourism landscape, further exacerbated by the Covid-19 pandemic, DNO commissioned a new large-scale study in partnership with Skift Advisory to understand emerging travel trends, best-bet markets, travel segments, and priority products and experiences. This study aims to provide valuable insights for Destination Management Organizations and operators to support their decision making.

The study combined extensive desk research, primary quantitative research conducted across Ontario, Manitoba, Quebec, parts of the United States, and the United Kingdom, along with digital and social listening insights and in-depth qualitative interviews with DNO recommended tourism operators, offering a holistic view of the evolving tourism landscape and opportunities for Northern Ontario.

ACKNOWLEDGEMENTS

Destination Northern Ontario provided a list of stakeholders to engage to help inform the research, approach, issues, and themes of this report. We thank the following individuals for the generosity of their time and commitment to tourism in Northern Ontario.

Adam Vallee, Fishing Guide, Angling Algoma

Albert Rogalinski, Owner, Goldseekers Canoe Outfitters and Wilderness Expeditions

Anne Brûlé, Directrice-adjointe au secteur culturel, Les Compagnons des francs loisirs

Blair Hagman, Owner, Manitoulin Brewing Company

Brad Oldham, Owner, French River ATV Tours

Brianna Humphrey, Owner, Radical Farms

Dan Belivacqua, Executive Director, Superior Country

David Wells, Owner, Naturally Superior Adventures

Dustin Brown, General Manager, Totem Resorts

Frank O'Connor, Owner, Voyaguers Lodge and Cookhouse

Gerry Cariou, Executive Director, Sunset Country

Gino Bourdages, Owner, Companion Hotel

Harald Lohn, Owner, Kabeelo Lodge & Outposts

Heather Bot, Executive Director, Algoma Kinniwabi Travel Association

Heather Gropp, Community Development Officer, Township of Sioux Narrows/Nestor Falls

Holden Rhodes, Owner, Killarney Mountain Lodge

Holly Cunningham, Executive Director, Creative Industries North Bay

Jackie Duhamel, Owner, Anderson's Lodge

Jennifer Court, Executive Director, Discovery Routes

Jennifer McCourt, Executive Director, Discovery Routes

Jeremy Dickson, Owner, Canoe Canada Outfitters

Karen Bittner, EDO, Town of Blind River

Kerry Lamarche, Executive Director, Kivi Park

Kevin Wyer, General Manager, Delta Sault Ste. Marie

Krista Cheeseman, Owner, Wilderness North

Kyle Polesky, Owner, Brace Lake Outfitters

Lacey Rigg, Manager, Tourism Timmins

Lara Fielding, Manager, City of Sudbury

Lori Branch, Owner, Seine River Lodge

Luke Wassegijig, Owner, Wasse-Giizhik Tours and Accommodations

Mike Jacobs, Owner, The New Business

Pat Peterson, Owner/Operator, Bruce Bay Cottages

Paul Trinkner, Owner, Muskie Bay Resort

Paul Pepe, Manager, Tourism Thunder Bay

Rob Wisneski, Owner, Stanley's Resort

Robin Sutherland, Owner, Northern Skies Resort

Sandra Thorkelson, Communications Coordinator, North Bay Indigenous Friendship Centre

Selena Graham, General Manager, Microtel Inn

Sue Crane, Owner, Cranes Lochaven

Tanya Bedard, Executive Director, Tourism North Bay

Tracey Vescio, Owner, Kashabowie River Resort

Travis Anderson, Director of Tourism, City of Sault Ste. Marie

Trevor Beard, Executive Director, Northeastern Ontario Tourism

Tyler Peacock, EDO, City of Dryden

Zack Lafleur, EDO, Nipissing First Nation

EXECUTIVE SUMMARY

Situational Analysis

Northern Ontario remains a strong domestic tourism destination, known for nature, recreation and evolving cultural experiences. While the region is seeing growth in immersive offerings like culinary tourism, it faces strong competition from other Canadian destinations. Notably, escalating U.S-Canada tensions driven by trade disputes and political discord may impact international travel patterns and market stability. As a result, all segmentation, estimates and recommendations in this report, based on historical data, should be applied with caution given the current volatility. However, U.S travel to Canada seems to be less impacted.

Traveller Segment

Five key traveller segments were identified: Road Adventurers, Culture Seekers, Paddlers, Outdoor Explorers, and Franco Travellers, each having unique preferences and motivations. The key traveller segments in this report have been broken down through activity-based segmentation, focusing on key products and experiences offered in the destination. The segments take into account current segmentation exercises performed by Destination Northern Ontario but assesses travellers using a different approach. Non-travellers were screened out and only avid travellers and the addressable market were examined.

Product Landscape

Northern Ontario offers a wide range of outdoor and cultural tourism products that align with the interests of diverse activity-based traveller segments. While the region performs strongly in snowmobiling, paddling and outdoor exploration, particularly in winter, it shows lower appeal in areas like francophone tourism and festivals. Its strengths lie in serene wilderness, Indigenous cultural experiences and cold weather offerings. Challenges include limited visibility, infrastructure gaps and seasonal unpredictability. The analysis uses survey data and digital listening to identify where Northern Ontario can sharpen its product appeal.

Recommendations

Northern Ontario has a strong foundation to grow tourism by focusing on its natural assets, cultural depth and seasonal diversity. Key recommendations include positioning the region as Canada's leading paddling and wilderness destination, reframing remoteness as a unique escape, and supporting Indigenous storytelling. Targeted marketing campaigns, user generated content and myth-busting communications could aim to boost awareness and intent. Product development focusing on improving paddling and road trip infrastructure could expand shoulder and winter season offerings. Investment efforts centre on unlocking funding and building operator readiness may support long-term growth.

METHODOLOGY

Situational Analysis

A combination of desktop research, an analysis of existing DNO data as well as qualitative in-depth interviews with tourism operators and DMO's were leveraged to uncover the state of tourism in Northern Ontario.

Quantitative Research

Data was collected via a custom online quantitative market research study fielded in the following 3 markets: USA, UK, Canada. The data was collected from these markets over 4 weeks in January and February 2025.

Digital Listening

Data related to sentiment was collected for activities identified to be of focus and importance to Destination Northern Ontario, via the web and social media platforms.

METHODOLOGY

Situational Analysis

A combination of desktop research, an analysis of existing DNO data as well as qualitative in-depth interviews with tourism operators and DMO's were leveraged to uncover the state of tourism in Northern Ontario.

Desktop Research

Qualitative Interviews

Desktop Research

An analysis of all existing Northern Ontario travel research was conducted with a focus on :

- Existing DNO research
- Destination Canada Data
- Existing Skift Data
- Open-source research

Qualitative Interviews

Qualitative in-depth interviews were conducted to uncover insights on the state of the Northern Ontario tourism:

- 20+ in-depth interviews with DNO recommended tourism operators and destination management organization representatives.

METHODOLOGY

Quantitative Research

Data was collected via custom online quantitative market research study fielded in 3 markets over 4 weeks in January and February 2025.

In-field dates

Data collection methodology

Survey design

Approach

In-field dates:

- 22 January – 17 February 2025

Data collection methodology:

- Quantitative market research survey
- Data was post-weighted to be reflective of the latest country census data

Survey design:

- 15-minute online survey
- Questions addressed:
    - Travel Interests
    - Destination Brand Funnel
    - Products and Experiences Perceptions
    - General Travel Behaviour
    - Demographics

Survey Markets and Samples

USA	**2,338**
New York	260
Wisconsin	260
Michigan	260
Illinois	258
Ohio	260
Florida	260
Texas	260
California	260
Minnesota	260

Canada	**2,755**
GTA	1,208
Northern Ontario	130
Rest of Ontario	483
Manitoba	414
Quebec	520

UK	**517**
East	46
East Midlands	41
Greater London	67
North East	22
North West	57
Northern Ireland	8
Scotland	41
South East	77
South West	45
Wales	25
West Midlands	45
Yorkshire and the Humber	43

METHODOLOGY

Quantitative Research

Quantitative Approach

A quantitative market research approach was utilized, surveying online research panels with stratified random sampling of the total adult consumer populations in each source market structured by age, gender and region according to the latest census data.

Survey Invites

Survey invitations were deployed randomly in small batches with potential respondents self-selecting. Age, gender, and regional quotas were continuously applied to ensure a demographically representative sample.

Respondent Screen

Potential respondents were screened into the survey based on travel behaviour: respondents who have travelled internationally or are likely to do so in the next 3 years (local travel included for Canadian respondents).

Survey Completion

Qualified respondents self-completed the survey based on their own perceptions of their travel behaviours.

Segment ID

Travel segments were defined based on respondents' stated likelihood to participate in 13 pre-determined travel activities when taking a trip. These 13 activities were statistically grouped into 5 themes, which form the basis of the 5 travel segments.

Segment Behaviour

Traveller segments were based on respondents' maximum average rating across the 5 themes. The segment indicates a person's primary activity interests, but does not preclude them from participating in other activities as secondary interests.

Segment Results

The results reported are reflective of the total relevant travel population in each market, and where listed, the total segment population.

Result Variance

Results will differ by specific regional and demographic sub-segments. For example, awareness of Canadian regions will be much higher among Canadian travellers compared to US or UK travellers.

METHODOLOGY

Digital Listening

Data related to sentiment was collected for activities identified to be of focus and importance to Destination Northern Ontario, via web and social media platforms.

- ***Volume**: Refers to the number of posts matching the keyword data.*
- ***Sentiment Score**: The difference between the percent of posts of positive less negative sentiment.*

Digital Platforms

- X
- Facebook
- Instagram
- YouTube
- Reddit
- Tumblr
- Web

Approach

- Digital listening tools were used to search social media platforms for keywords.
- Activity themes were pre-determined in discovery phase.
- Keywords were identified through research and collaboration.
- Locations have been aligned to specific activity themes based on competitive relevance.
- Limited Hashtag data could be pulled from Instagram due to digital listening limitations.

Examples of keywords

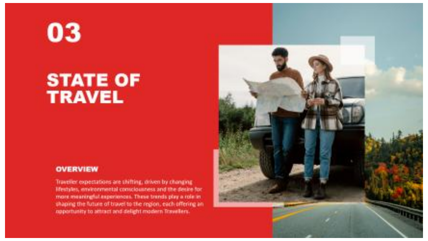
#Cycling #Angling #Hiking#ATV
#Indigenous #Kayaking
#Motorcycling #Snowmobiling
#QuadBiking #Fishing #Sailing
#Biking #CulturalTourism #BikeTours
#PaddleLife
#Festival #Francophone #Trails
#Paddling #MotorcycleRally
#Museum #BoatLife #LocalCulture
#ATV #AnglingAdventures #RVLife
#Museum #RoadTrip
#BoatLife #Heritage Travel
#CycleTours #WinterFestival
#MusicFestival #FrenchCulture
#FishingLife #Motorhome

HOW TO READ THIS DOCUMENT

Reading the report

This report is intended for the use of tourism organizations, tour operators, destination management organizations, and other travel and tourism related parties in the Northern Ontario region to provide insights on the current traveller market relevant to Northern Ontario and allow for an enhanced understanding of visitor perceptions, barriers to travel and traveller segments of key interest to the destination that present high value opportunities.

Report Sections



03

STATE OF TRAVEL

OVERVIEW

Traveller expectations are shifting, driven by changing lifestyles, environmental consciousness and the desire for more meaningful experiences. These trends play a role in shaping the future of travel to the region, each offering an opportunity to attract and delight modern Travellers.

A current state assessment of Northern Ontario's traveller base, products and overall destination perceptions and barriers.

04

KEY TRAVELLER SEGMENTS

OVERVIEW

Northern Ontario is the perfect escape for adventure and discovery. Whether it's road trippers and outdoor explorers drawn to its scenic routes and rugged landscapes or cultural and Francophone travelers seeking its rich heritage, the region offers something for everyone. This section explores Northern Ontario's key traveler segments and the experiences that attract them.

Categorization and deep dive into activity-based traveller segments, including their respective market opportunities.

05

PRODUCT LANDSCAPE

OVERVIEW

Northern Ontario is perfectly positioned and is home to a multitude of adventure activities that catch the eye and interest of activity-based traveller segments. The product landscape can be described as "something for everyone" – from thrill seekers looking for water or snow sport to families seeking out fun adventures to make meaningful memories.

Northern Ontario's products, the destination appeal for those products and how travellers associate key attributes of the product to the destination.

06

BEST-BET MARKETS

OVERVIEW

This section presents an analysis of the key source markets for visitors to Destination Northern Ontario, focusing on domestic travel within Canada and international travel from the United States and the United Kingdom. The section will illustrate the geographic distribution of visitors, highlighting core markets.

Diving deeper into key source markets: Canada, USA and UK with a regional breakdown of market size and segment size across key regions in USA and Canada.

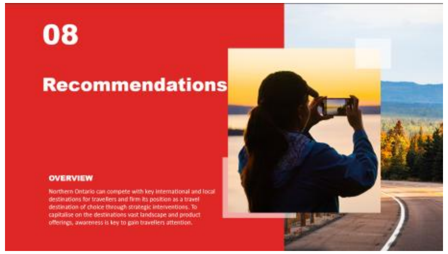
07

Challenges & Opportunities

OVERVIEW

This section presents a summary of the challenges highlighted throughout the document and the corresponding opportunities that exist to enhance Northern Ontario's appeal as a top tier tourism destination for key traveller segments.

Summarising the challenges and opportunities represented in the report, that will enable the formulation of recommendations.



08

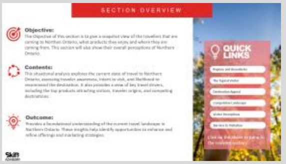
Recommendations

OVERVIEW

Northern Ontario can compete with key international and local destinations for travellers and firm its position as a travel destination of choice through strategic interventions. To capitalise on the destinations vast landscape and product offerings, awareness is key to gain travellers attention.

Providing actionable recommendations, using report insights, that the destination can implement to unlock the full potential of Northern Ontario's tourism.

Report Tools



SECTION OVERVIEW

Objective:

Contents:

Outcome:

QUICK LINKS

Section Overviews: Provides an understanding of what the section aims to achieve.

Visitor Perceptions

Barriers to Visitation

Clickable Links: Allows for easy navigation to relevant sections for the reader.

Northern Ontario's potential is within reach

+ Boosting awareness is the first step
The more people know about the destination, the more likely they are to visit and recommend it to their friends and family.

+ Beating barriers through education
The only way to deal with misconceptions and gaps in understanding is to educate travellers.

+ Targeting leads to greater conversion
A targeted approach lands better leads. Use a segmented approach to streamline and optimize marketing and positioning efforts.

Three Point Summaries: Summarizes the key takeaways of each section.

HOW TO READ GRAPHS

Reading the graphs

To interpret the graphs in this report, it’s important to understand the scoring method used. Each graph displays destinations along the x-axis, while the y-axis represents the percentage of travellers who selected a high score. All graphs are constructed using the top 3 box (most likely) which means that only responses where travellers rated a destination 8, 9 or 10 out of 10 are included.

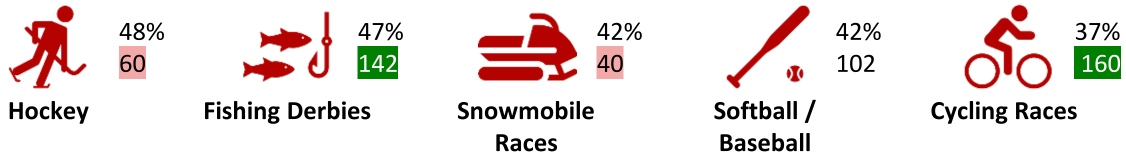
Key Definitions

	Definition	Description
1	**Familiarity**	This refers to how well travellers know a destination, especially in terms of what it offers as a holiday or vacation spot.
2	**Impression**	This is the overall feeling or perception travellers have about a destination, based on what it offers as a holiday or vacation experience.
3	**Likelihood To Visit**	This refers to how likely travellers are to choose a destination for a holiday or vacation within the next 2 to 3 years.
4	**Likelihood To Recommend**	This is how likely travellers are to recommend a destination to others, based on what it offers as a holiday or vacation experience.
5	**Barriers**	These are key perceptions, beliefs, or concerns that might prevent travellers from choosing Northern Ontario as a destination.

Absolute & Index Values

In this report, both absolute values and index scores are used to highlight statistically significant insights. Absolute values represent the actual percentage of traveller responses within each segment. Index scores, on the other hand, compare how one segment behaves or thinks relative to another. Index scores above 120 indicate strong performance or interest (over-indexed), while below 80 shows lower than average results (under-indexed).

EXAMPLE INDEX VS PERCENTAGE*



INDEX COLOUR LEGEND: 🟥 Less relevant, relative to average score 🟩 More relevant, relative to average score

*Example of graph from page 52

03

STATE OF TRAVEL

OVERVIEW

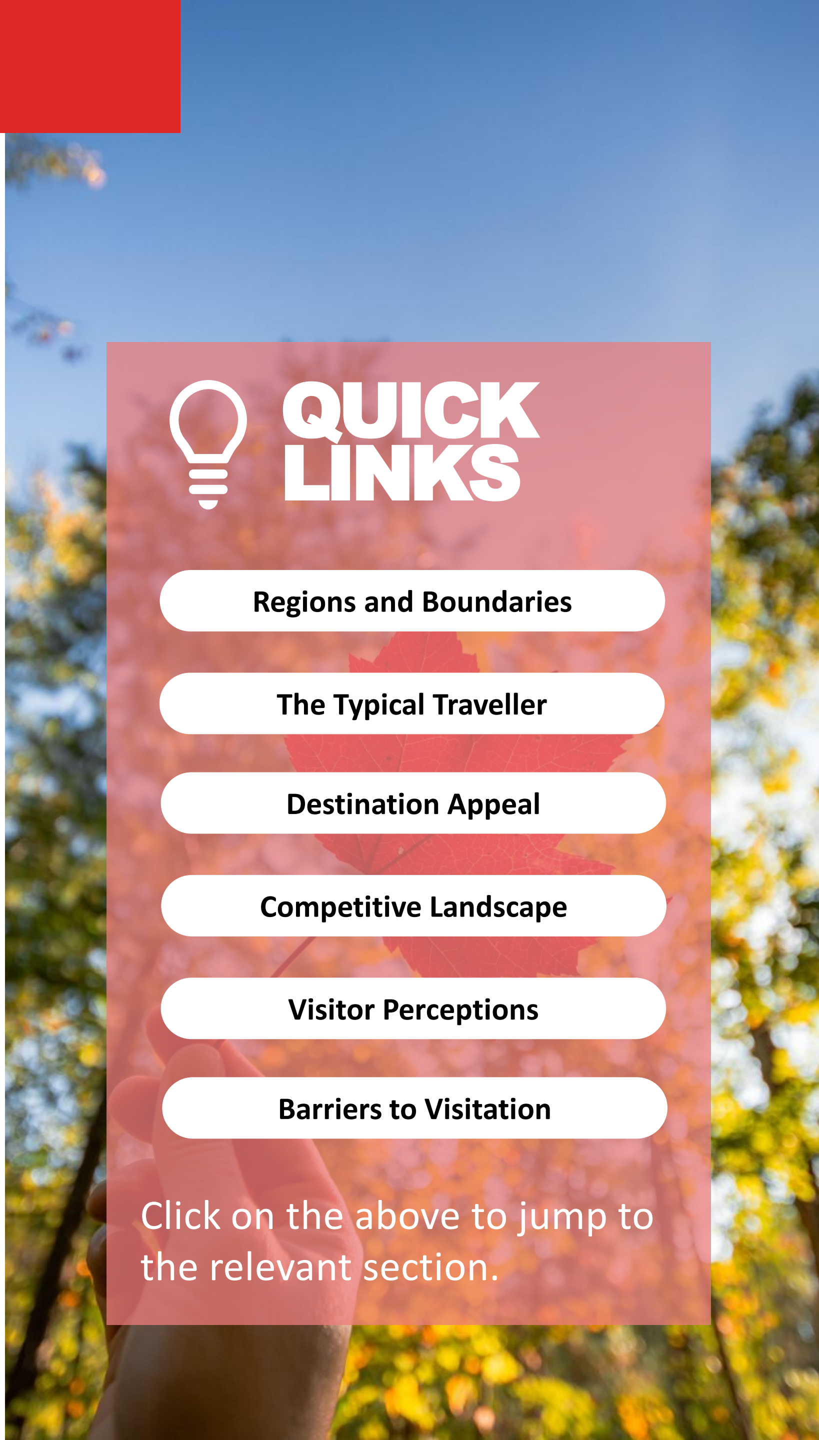
Traveller expectations are shifting, driven by changing lifestyles, environmental consciousness and the desire for more meaningful experiences. These trends play a role in shaping the future of travel to the region, each offering an opportunity to attract and delight modern travellers.

SECTION OVERVIEW

Objective:
The objective of this section is to give a snapshot view of the travellers that are coming to Northern Ontario, what products they enjoy and where they are coming from. This section will also show their overall perceptions of Northern Ontario.

Contents:
This situational analysis explores the current state of travel to Northern Ontario, assessing traveller awareness, intent to visit, and likelihood to recommend the destination. It also provides a view of key travel drivers, including the top products attracting travellers, traveller origins, and competing destinations.

Outcome:
Provides a foundational understanding of the current travel landscape in Northern Ontario. These insights help identify opportunities to enhance and refine offerings and marketing strategies.



QUICK LINKS

- Regions and Boundaries
- The Typical Traveller
- Destination Appeal
- Competitive Landscape
- Visitor Perceptions
- Barriers to Visitation

Click on the above to jump to the relevant section.

Northern Ontario: Region & Boundaries

Understanding the geographical landscape.

Northern Ontario is one region (RTO 13) with three sub-regions.

Northeastern Ontario covers areas like Sudbury, Timmins, Temiskaming Shores and North Bay, serving as a hub for mining, tourism, and outdoor recreation.

Northwestern Ontario , west of Lake Superior, includes cities like Thunder Bay and Kenora, and is known for mining and forestry. The Northwestern Fringe acts as a transition zone between Northern and Southern Ontario.

Far North Ontario is remote and road-inaccessible, consisting mainly of fly-in Indigenous communities and untouched northern ecosystems.

In Northern Ontario, the main treaty areas include Treaty 3, Treaty 9 (James Bay Treaty), and the Robinson Treaties

Northern Ontario: The Typical Traveller

The majority of travellers to Northern Ontario come from other regions of Canada, the USA and European countries.

Travellers are drawn to Northern Ontario for a variety of reasons, often combining recreation with family visits or regional exploration.

The majority of domestic travellers to Northern Ontario usually come from within Ontario, with a strong representation from Toronto, Manitoba/Western Canada, and surrounding urban areas. The region also attracts travellers from other Canadian provinces, particularly those seeking unique outdoor adventures.

Internationally, key source markets include the UK, Germany, and the USA, with states like Michigan, Illinois, and Pennsylvania driving demand for specific products such as angling and other outfitter adventures. Additionally, there could be an opportunity to attract more travellers from Asian markets, including China, South Korea, and Japan.

EXISTING

- Canada
- USA
- UK
- Germany

POTENTIAL

- China
- South Korea
- Japan

Source: Northern Ontario Travel Survey, 2024; Destination Northern Ontario, International Business Development Report, 2023-2024

Northern Ontario: The Appeal

A vast and untamed region rich in off-the-beaten path experiences.

Northern Ontario is known for its untouched landscapes, natural beauty, rich culture and plethora of outdoor activities. It can be envisioned as a playground for outdoor seekers from around the world looking to take part in one or more of the outdoor activities that Northern Ontario has to offer.

Fishing, hunting, camping, snowmobiling and motorcycling are among the many experiences that attract travellers, with nearly 50% of domestic travellers coming to immerse themselves in nature, enjoy sports or connect with family.

Additionally, the region's unique culinary scene is shaping food tourism, adding another dimension to its growing appeal. As investment and development continue, the region is set to establish itself as a premier destination for those seeking authentic experiences and an escape into the wild.

DRIVERS

- ▲ Beautiful nature
- ▲ Indigenous and other culturally rich experiences
- ▲ No significant overtourism

INHIBITORS

- Perception of limited product and experience offerings ▼
- Among hardest-hit areas of Ontario by pandemic ▼
- High travel cost/long distances ▼
- One Tourist rail operator ▼
- Dependence on external travellers ▼

Source: Nordik Institute, Tourism in Northern Ontario: 2021 Results for Visitors and Operators

The Competitive Product Landscape

Despite the diverse range of outdoor experiences, Northern Ontario faces strong local competition.

Tourism competition in Canada is intense, with each province offering a unique take on outdoor and cultural experiences. Its vast geography makes it a prime destination for outdoor tourism, with each region carving out its niche.

Locally, Northern Ontario faces strong competition from **Quebec, The Greater Toronto Area, Ottawa, Manitoba, Saskatchewan** and **Cabot Trail**, each known for their own variations of outdoor and cultural tourism. These destinations share key tourism products with Northern Ontario, including angling, boating, culture and heritage, festivals, francophone tourism, hiking, snowmobiling as well as hosting business conferences.

	Quebec	GTA	Ottawa	Cabot trail
Angling	✓			
Auto/ RV Touring				✓
Boating	✓			
Culture/heritage	✓	✓		✓
Cycling			✓	✓
Festivals/events	✓	✓		
Francophone Tourism	✓	✓		
Hiking	✓		✓	
Indigenous Tourism		✓		
Meetings/Conferences	✓	✓	✓	
Motorcycling				✓
Paddling				
Snowmobiling			✓	
Sports		✓	✓	✓

Source: Skift Advisory

The Competitive Product Landscape

Internationally, Northern Ontario competes with top outdoor tourism destinations in the USA and Scandinavia for a finite pool of travellers.

On the global stage, Vermont, Minnesota and Maine are Northern Ontario’s closest competitors in the US market. These destinations are known for their pristine wilderness and water-based recreation. Vermont and Maine attract travellers with stunning fall foliage, hiking trails and boating experiences, while Minnesota, known as the land of 10 000 lakes, offers extensive water-based tourism.

Beyond North America, Scandinavian countries like Norway and Sweden pose fierce competition drawing outdoor seekers with Northern Lights, dog sledding and unique winter activities.

	Vermont	Minnesota	Maine	Norway
Angling	✓	✓	✓	
Auto/ RV Touring	✓		✓	
Boating		✓		✓
Culture/heritage	✓	✓		✓
Cycling	✓		✓	
Festivals/events	✓			✓
Francophone Tourism				
Hiking	✓	✓	✓	✓
Indigenous Tourism			✓	
Meetings/Conferences				
Motorcycling				
Paddling	✓	✓	✓	
Snowmobiling		✓		✓
Sports				✓

Source: Skift Advisory

Traveller Perceptions

Recent surveys highlight key traveller needs and their desire for more unique experiences.

In a 2021 study on Northern Ontario's tourism conducted by the Nordik Institute (n=335 survey respondents), travellers expressed a growing demand for unique activities, with water-based adventures such as parasailing, pontoon boat rentals, and SeaDoo experiences topping the list.

Additional suggestions included ATV rentals, outdoor music events, and expanded Indigenous tourism experiences, with 45% of respondents showing strong interest in learning more about Indigenous cultures.

Beyond activities, travellers emphasized the need for extended operating seasons, better infrastructure such as roads and campgrounds, and stronger environmental protections to maintain the region's natural beauty.

DRIVERS

- ▲ Outdoor activities
- ▲ Scenic natural environment & waterways
- ▲ Winter landscapes & activities

INHIBITORS

- Limited operating seasons ▼
- Infrastructure limitations ▼
- Weather and travel costs ▼
- Low maintenance of natural beauty ▼

Source: Nordik Institute, Tourism in Northern Ontario: 2021 Results for Visitors and Operators

Overall Northern Ontario Perceptions

Low familiarity and travel intent signals potential barriers preventing travellers from choosing Northern Ontario as a travel destination.

Familiarity

20%

Only 20% of travellers report that they are familiar with Northern Ontario's offerings (with domestic visitors at 28% awareness). In other Skift research, we found nearly 7% of U.S. travellers had intentions to travel to Northern Ontario in the next year. This is a key barrier. Low awareness means **that travellers might not be considering Northern Ontario as a potential destination.** Awareness was higher for Road Adventurers (33%) and Franco Travellers (26%)

Impression

61%

Among those who know about Northern Ontario, the destination performs fairly well on impression- 61% of **travellers familiar with it have a positive view.**

Travel Intent

25%

However, **the challenge is converting that positive impression into action.** Only 25% of travellers express intent to visit Northern Ontario. This is in line with low familiarity – if awareness is low, be default the travel intention would also be low.

Advocacy

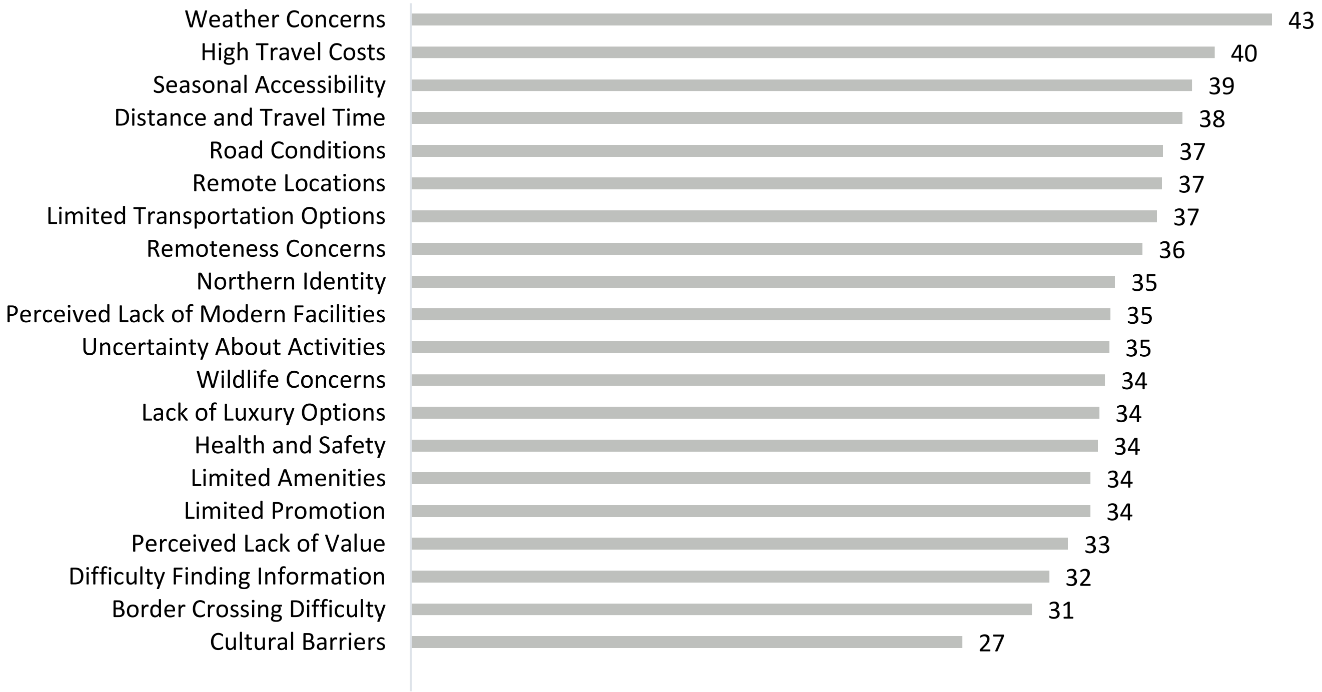
60%

Interestingly, **when people do visit, they become advocates.** 60% of travellers say they would recommend Northern Ontario as a destination. This is a powerful proof point: experiences exceed expectations.

Barriers to Visitation

Weather is the primary perceived barrier to visiting Northern Ontario, followed by travel costs, presenting a unique challenge due to the region's geographical location.

BARRIERS



Q: Which of the following are the most important perceptions and beliefs when traveling to Northern Ontario? (Considering travellers main concerns)

Northern Ontario's core challenge may be overcoming perceptions of inaccessibility and cost. High concern over weather, travel costs, and seasonal limitations signals that improving access, affordability, and positioning the region's remoteness as a unique strength could be critical to driving visitation. **Product quality is not the main barrier, perceptions around effort, expense, and logistical complexities are**.

Northern Ontario has the right ingredients for increased tourism.

- **Travellers are domestic and international.**
  Majority of domestic travellers are from within Ontario. Key international markets include USA, UK and Germany.
- **Natural landscape and activities pull travellers to Northern Ontario.**
  Nearly 50% of travellers coming to immerse themselves in nature, enjoy sports or connect with family.
- **Overall awareness and travel intent remain low.**
  The contrast between low awareness and high advocacy and impression scores signal barriers such as weather concerns and high travel costs deter travellers.

04

KEY TRAVELLER SEGMENTS

OVERVIEW

The key traveller segment in this report looks at activity-based segments, focusing on key products and experiences offered in the destination and segments the traveller population based on activities. It is derived from the previous and current segmentation exercises performed by Destination Northern Ontario but assesses segmentation using a different approach.

SECTION OVERVIEW

Objective:

The objective of this section is to provide a deep dive into Northern Ontario's key traveller segments. It examines the market size, the activities they engage in, their path to purchase, and their travel behaviours and preferences. This analysis helps identify opportunities to enhance appeal and drive conversion across different traveller groups.

Contents:

Segments are analyzed across:

- Market size and segment share of population .
- Key segment activities, travel behaviours, habits and barriers to travel.
- Survey scores on path to purchase – familiarity, impression, travel intent and advocacy.

Outcome:

Destination developers, operators, and tourism stakeholders can leverage the insights from this section to better understand key traveller segments, their behaviours, barriers, and needs. This knowledge will enable them to tailor marketing strategies and optimize Northern Ontario's offerings, ensuring a more effective alignment with travellers' preferences and expectations.

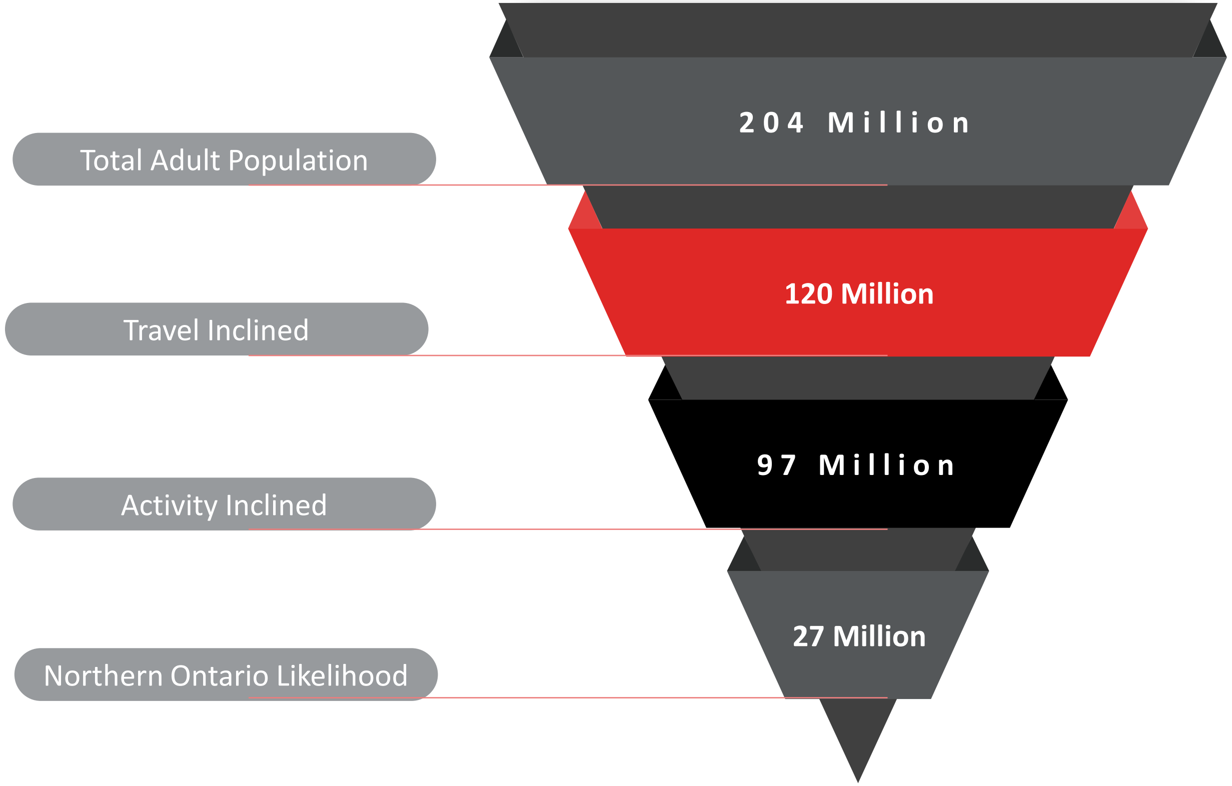
QUICK LINKS

- Culture Seekers
- Paddlers
- Franco Travellers
- Outdoor Explorers
- Road Adventurers

Click on the above to jump to the relevant section.

Traveller Market Size

Northern Ontario's total addressable market from the United States, Canada, and the UK is estimated to be 27 million people, with 22 million of these being activity specific travellers.

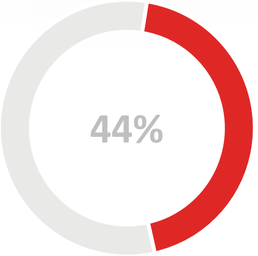


Northern Ontario has a sizable addressable market across the U.S, Canada and the UK, with a strong appetite for tourism. **While 27 million travellers show potential to visit, there is an opportunity to convert more of the 97 million activity inclined travellers** by leveraging the regions outdoor offerings.

Key segments of interest

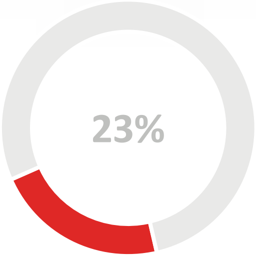
Introducing Destination Northern Ontario’s addressable traveller segments.

Culture Seekers



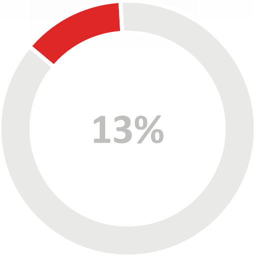
SHARE OF POPULATION

Paddlers

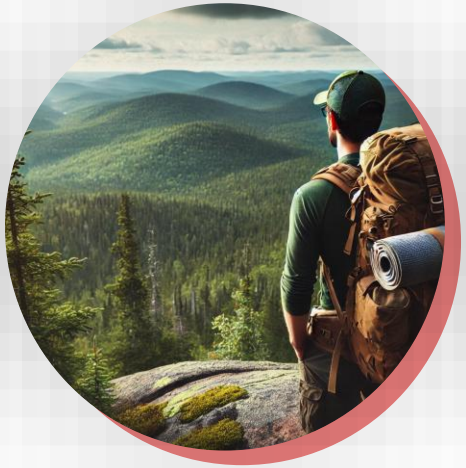


SHARE OF POPULATION

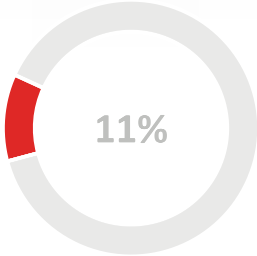
Franco Travellers



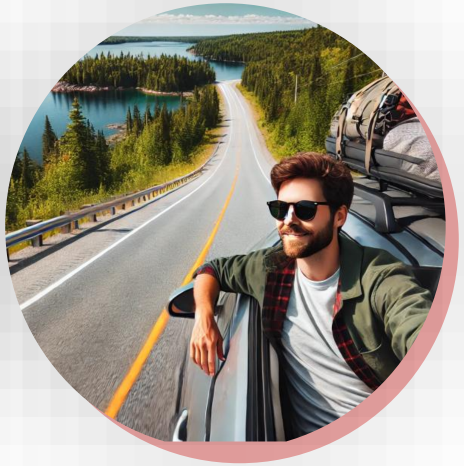
SHARE OF POPULATION



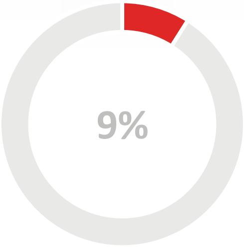
Outdoor Explorers



SHARE OF POPULATION



Road Adventurers



SHARE OF POPULATION





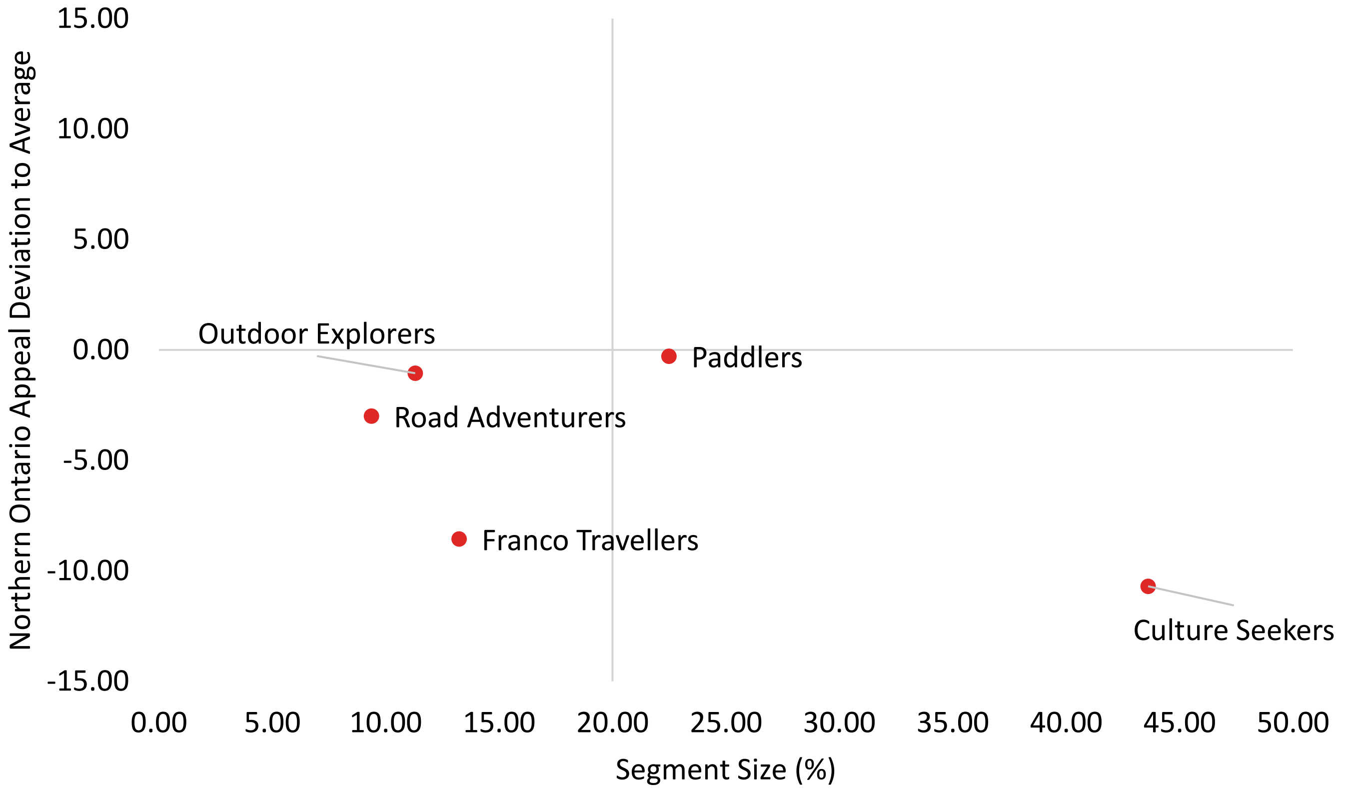
Segment	**Culture Seeker** *44% of population*	**Paddlers** *23% of population*	**Franco Travellers** *13% of population*	**Outdoor Explorers** *11% of population*	**Road Adventurer** *9% of population*
Products	Culture/heritage Festivals/Events Indigenous tourism	Paddling	Francophone Tourism	Angling/Fishing Boating Camping/Hiking	Snowmobiling, Motorcycling, ATV-Ing, Auto/RV touring & Cycling
Challenges	Poor weather Too expensive Poor road conditions	Seasonal availability Poor Weather Too expensive	Poor weather Remote and unreachable Less cosmopolitan	Poor weather Healthcare access Too expensive	Poor weather No unique experience Limited transportation
Competitors	Northeast USA Scotland/Ireland	Northeast USA Southern Ontario	Northeast USA Quebec	Southern Ontario Great Lakes States	Northeast USA Southern Ontario

Note: Competitors Based on Top 2 Likelihood to visit for each segment

Segment Prioritization

Northern Ontario can win with paddlers while unlocking potential among culture seekers, despite requiring more effort to boost appeal.

SEGMENT PRIORITIZATION MATRIX



Paddlers show appeal for Northern Ontario in line with the market average and **represent the second largest segment, making them a prime opportunity to capture.** While the smaller Outdoor and Road segments perform well, their size limits overall return potential. Franco Travellers and Culture Seekers require significant effort to bridge the appeal gap, though **Culture Seekers remain worth exploring due to their larger market size.**

The addressable market size remains promising.

+ **Addressable market size is high.**
27 million travellers show potential to visit, with 22 million of these being activity inclined travellers, and opportunity to convert more.

+ **Segment based approach is the way to go.**
Targeting travellers using a segment approach can enable Northern Ontario to increase its appeal and awareness.

+ **Dominant market segments to be prioritized.**
Paddlers and Culture Seekers dominate the market in terms of size and opportunity.

Culture Seekers

9.9M
(Travellers)

$34.1B
(Market Size)

Travellers interested in history, art, and local traditions visit museums, heritage sites, and cultural events to deepen their understanding. 77% have travelled locally in the past three years, 72% internationally, and 96% plan an overnight holiday in the next three years.

Activities

- Cultural/ Heritage
- Festivals / Events
- Indigenous Tourism

Channels

Demographics

- Majority Female (56%), Average Spend ($3,450), Average Income ($95,602)
- Skews to Young Cohorts: 18-24yrs (7%,), 25-34yrs (15%) and 35-44yrs (17%)
- Mainly Medium-income bracket (59%, 101)

Trip Traits

- Small group size
- Medium trip
- Likely to travel in June, July & September

Source Markets

USA	UK	Canada
33%	39%	29%

Media Habits & Travel Behaviour

→ Culture seekers use Google for inspiration, prefer visiting in summer and early fall, travel in small groups, and show low interest in sports events.

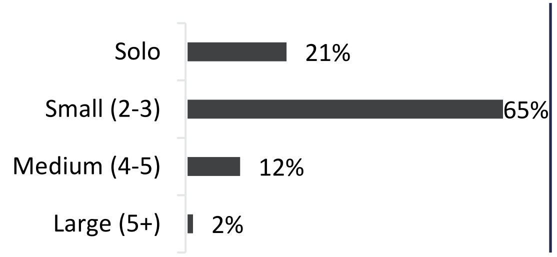
SPORTING INTERESTS

Hockey	38%	82
Softball / Baseball	33%	82
Cycling Races	28%	75
Snowmobile Races	27%	68
Skiing Races	25%	72
Canoe / Kayak Races	25%	69
Trail Running	23%	69
Fishing Derbies	21%	64
Curling Bonspiels	20%	72
Ultimate Frisbee	19%	65

CHANNELS

	Absolute	Index			
GOOGLE/OTHER SEARCH ENGINE	59	108	SOCIAL MEDIA CHANNELS - Facebook	27	88
DESTINATION WEBSITES	47	113	SOCIAL MEDIA CHANNELS - Instagram	26	86
REFERRALS & RECOMMENDATIONS - Friends	44	116	TRAVEL REVIEW SITES - not Trip Advisor	23	106
HOTEL/RESORT WEBSITE	43	110	TELEVISION/STREAMING - Travel shows	21	105
TRAVEL REVIEW SITES - Trip Advisor	42	107	SOCIAL MEDIA CHANNELS - TikTok	19	78
SOCIAL MEDIA CHANNELS - YouTube	35	90	REFERRALS & RECOMMENDATIONS - Travel agents/Tour operators	18	106
AIRLINE WEBSITE	32	110	PRINT - Travel guidebooks	18	109

SIZE OF PARTY



TRIP DURATION

Day & Overnight Trip (1-2 days)	8%
Short Trip (3-5days)	27%
Medium Trip (6 - 10 days)	42%
Long Trip (11 or more days)	23%

MONTH OF TRAVEL

JAN	FEB	MAR	APR	MAY	JUN
4% 77	7% 77	10% 98	10% 93	20% 111	22% 98
JUL	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**
24% 97	18% 100	23% 125	12% 116	5% 99	6% 71

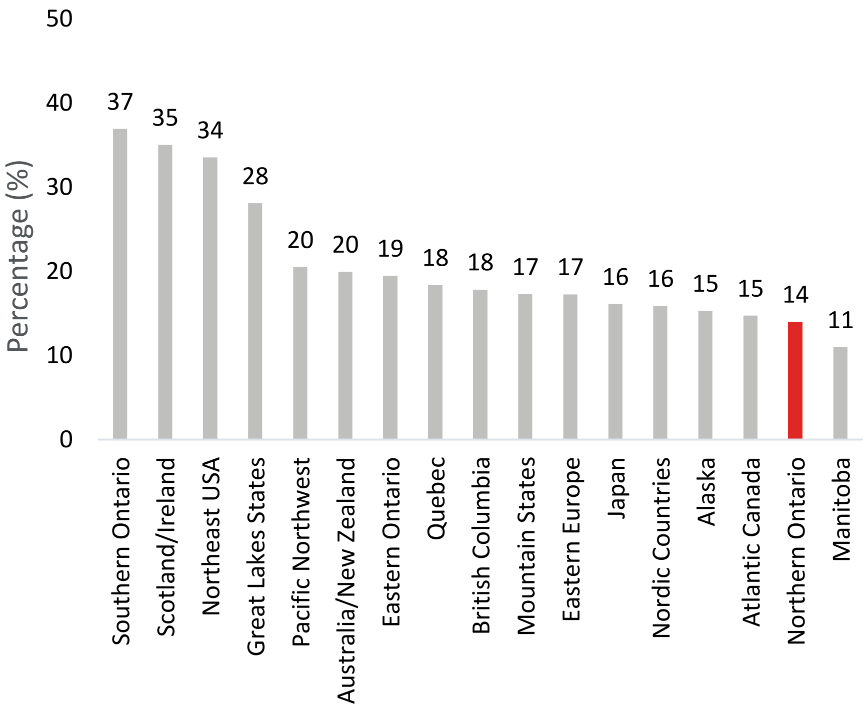
INDEX COLOUR LEGEND: 🟥 Less relevant, relative to average score 🟩 More relevant, relative to average score

Awareness

Building awareness can unlock Northern Ontario’s potential with culture-seeking travellers.

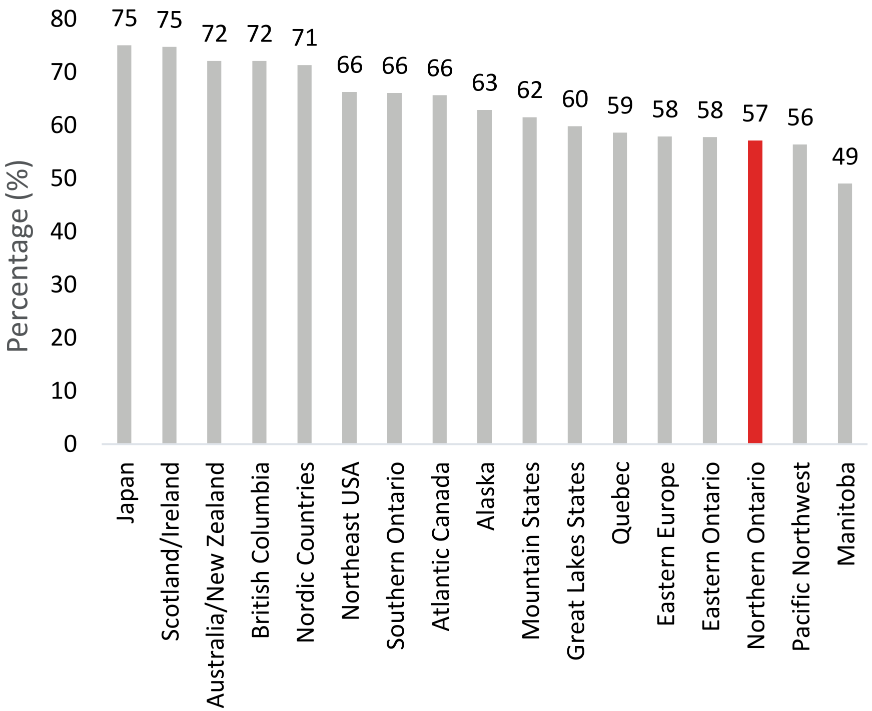
Northern Ontario is less known among culture seekers but has room to grow. Destinations like Japan and Ireland are better recognized, showing there’s an opportunity to raise Northern Ontario’s profile. By showcasing its unique cultural experiences, the region can be positioned as a strong alternative for travellers seeking new, authentic destinations.

FAMILIARITY



Q: How familiar are you with each of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

IMPRESSION



Q: What is your overall impression of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

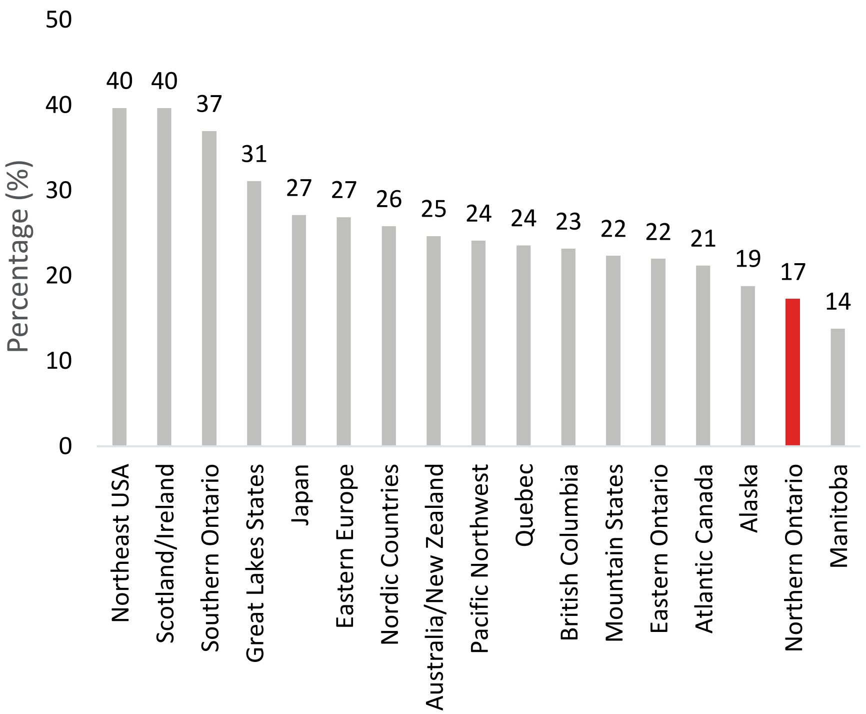
Interest and Advocacy

Travellers who experience Northern Ontario are likely to recommend it - an opportunity to grow through word of mouth.

Despite the low likelihood to visit, Northern Ontario enjoys a relatively strong likelihood of recommendation, suggesting that **those who do experience the destination leave with a positive impression.**

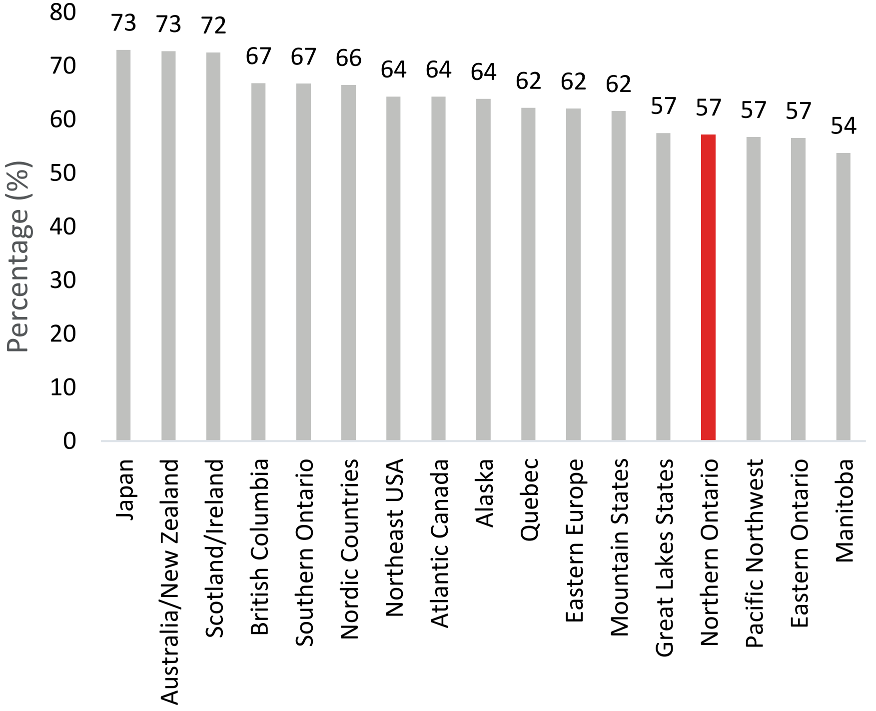
Suggesting an opportunity to leverage satisfied travellers as advocates to bridge the awareness gap.

LIKELIHOOD TO VISIT



Q: And how likely are you to visit each of the following destinations for a holiday/vacation over the next 2-3 years? (Top 3 Box)

LIKELIHOOD TO RECOMMEND



Q: How likely, if at all, would you be to recommend the following tourism destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

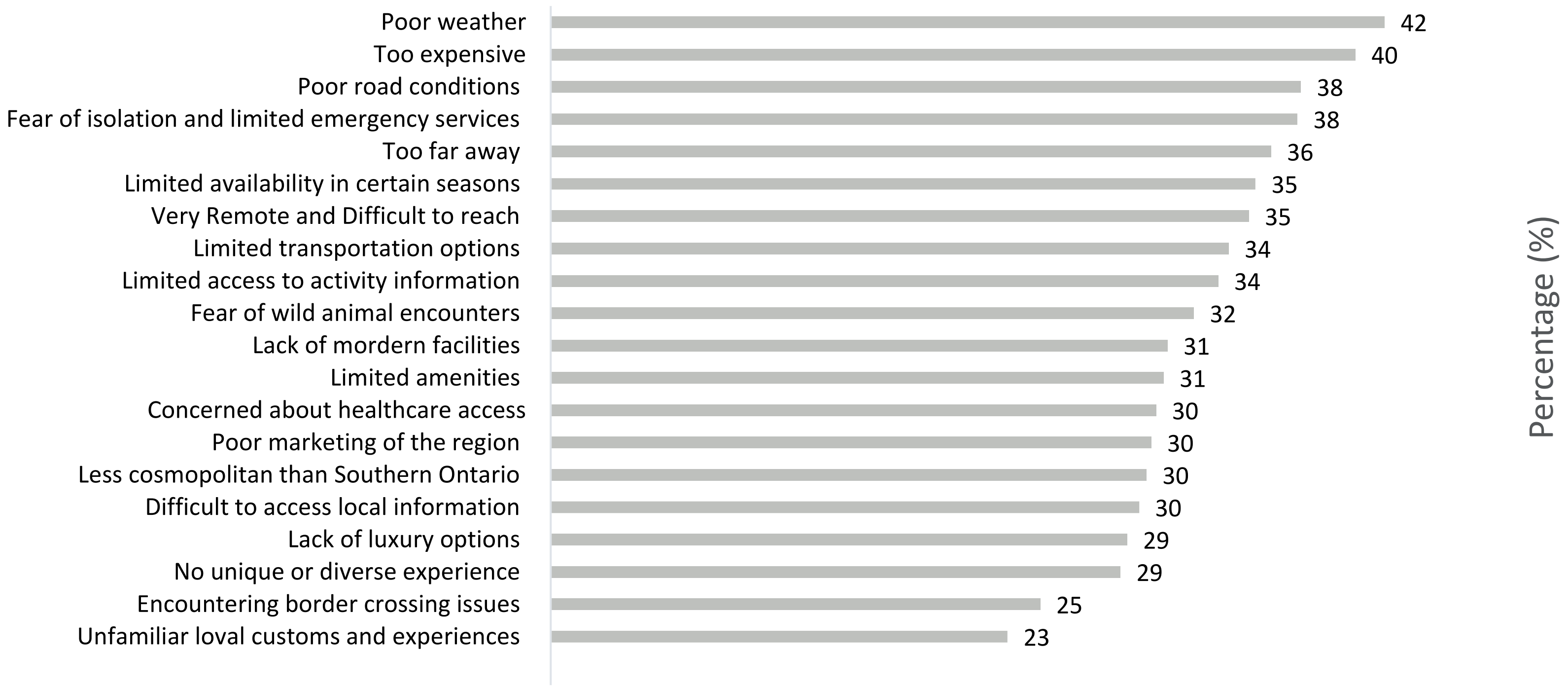
CULTURE SEEKERS

Barriers

Addressing cost, weather, and road concerns can open Northern Ontario to more Culture Seekers.

Culture seekers perceive Northern Ontario as a challenging destination due to barriers such as poor weather, high costs, poor road conditions, fear of isolation and limited emergency services, making it less competitive against more accessible cultural destinations. Overcoming these perceptions requires strategic efforts to highlight the region's year-round cultural appeal, improve awareness of travel safety, and enhance accessibility.

BARRIERS



Q: Which of the following are the most important perceptions and beliefs when traveling to Northern Ontario? (Considering travellers main concerns)

Path to Purchase

Culture seekers familiarity with Northern Ontario's offer is low impacting their intent to travel to the destination.

Familiarity

14%

The biggest challenge is awareness-only 14% of culture seekers are familiar with Northern Ontario's offerings. This indicates a **need to educate potential travellers** on what makes Northern Ontario a unique cultural destination.

Impression

57%

Once culture seekers are aware of Northern Ontario, their perception is generally positive, with 57% reporting a favourable impression. The data suggests that **when people learn about the destination, they find it appealing.**

Travel Intent

17%

Despite positive impressions, only 17% of culture seekers express intent to visit in the near future. **This conversion gap signals a need to address barriers to travel**-whether it's accessibility, cost, or competing destinations.

Advocacy

57%

Interestingly, the advocacy rate is strong-57% of culture seekers would recommend Northern Ontario as a travel destination. This means that **those who experience the region are likely to become ambassadors.**

Product development and awareness can unlock potential.

+ **Culture seekers may be a good opportunity.**
Given the large size of the culture seekers market, this segment present a promising opportunity through enhanced awareness and driving the cultural narrative to lure travellers.

+ **Awareness is low but there is room to grow.**
Awareness of cultural offerings in the destination is currently low, but there is room to grow through tailored campaigns and marketing.

+ **Addressing misconceptions can unlock potential opportunities.**
Barriers to travel are often bred through misconceptions and lack of awareness. Educating travellers is the first step to driving awareness and increasing travel intent.

Paddlers

4.8M
(Travellers)

$14.7B
(Market Size)

Outdoor enthusiasts who explore lakes and rivers by kayak or canoes. They enjoy paddling through different waterway and experiencing nature from the water. 96% are likely to take an overnight holiday in the next 3 years.

Activities

Paddling

Channels

Demographics

- Majority Female (51%), Average Spend ($3,064), Average Income ($96,179)
- Skews to Young Cohorts: 18-24yrs (15%,), 25-34yrs (21%) and 35-44yrs (21%)
- Mainly Medium-income bracket (60%, 103)

Trip Traits

- Small group size
- Medium trip
- Likely to travel in June, July or August

Source Markets

USA	UK	Canada
32%	30%	38%

Media Habits & Travel Behaviour

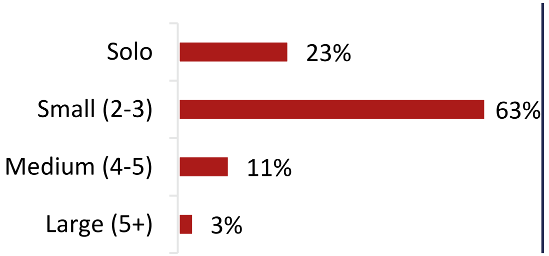
Paddlers are most likely to visit in small groups during June, July and August, relying on Google and social media channels for travel inspiration.

PADDLERS

SPORTING INTERESTS

48% 103	45% 125	42% 106	41% 99	37% 100
35% 107	35% 102	33% 99	32% 110	29% 105

SIZE OF PARTY



TRIP DURATION

Day & Overnight Trip (1-2 days)	13%
Short Trip (3-5days)	31%
Medium Trip (6 - 10 days)	38%
Long Trip (11 or more days)	18%

CHANNELS

	Absolute	Index
GOOGLE/OTHER SEARCH ENGINE	55	100
SOCIAL MEDIA CHANNELS - YouTube	41	105
TRAVEL REVIEW SITES - Trip Advisor	39	101
HOTEL/RESORT WEBSITE	38	96
DESTINATION WEBSITES	37	90
REFERRALS & RECOMMENDATIONS - Friends	35	94
SOCIAL MEDIA CHANNELS - Instagram	34	112
SOCIAL MEDIA CHANNELS - Facebook	31	100
SOCIAL MEDIA CHANNELS - TikTok	27	113
AIRLINE WEBSITE	27	92
TRAVEL REVIEW SITES - not Trip Advisor	21	100
MEDIA INFLUENCERS - Travel bloggers	20	111
TELEVISION/STREAMING - Travel shows	18	89
SOCIAL MEDIA CHANNELS - Pinterest	17	125

MONTH OF TRAVEL

JAN	FEB	MAR	APR	MAY	JUN
5% 93	10% 116	13% 121	10% 93	17% 92	23% 104
JUL	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**
25% 103	18% 100	17% 91	11% 108	6% 117	8% 105

INDEX COLOUR LEGEND: 🟥 Less relevant, relative to average score 🟩 More relevant, relative to average score

Awareness

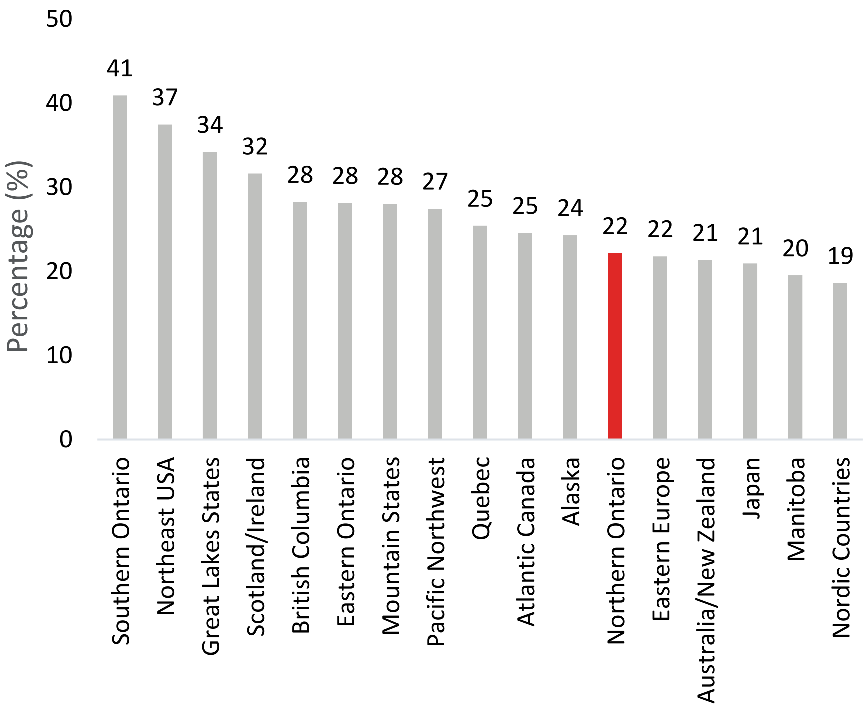
Northern Ontario has strong potential to grow as a paddling destination with improved destination awareness.

PADDLERS

Northern Ontario’s paddling experiences are strong, **but low awareness** (22%) **means potential travellers don’t think of it for water activities.**

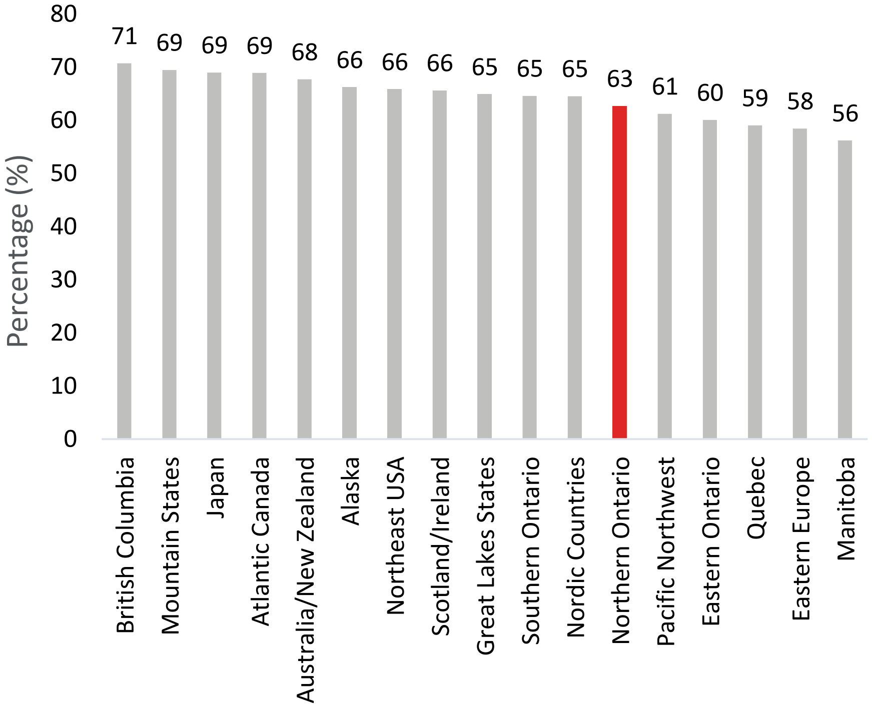
With a positive impression among those who know it (63%), targeted marketing is the key to turning this into bookings and competing with places like British Columbia.

FAMILIARITY



Q: How familiar are you with each of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

IMPRESSION



Q: What is your overall impression of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

Interest and Advocacy

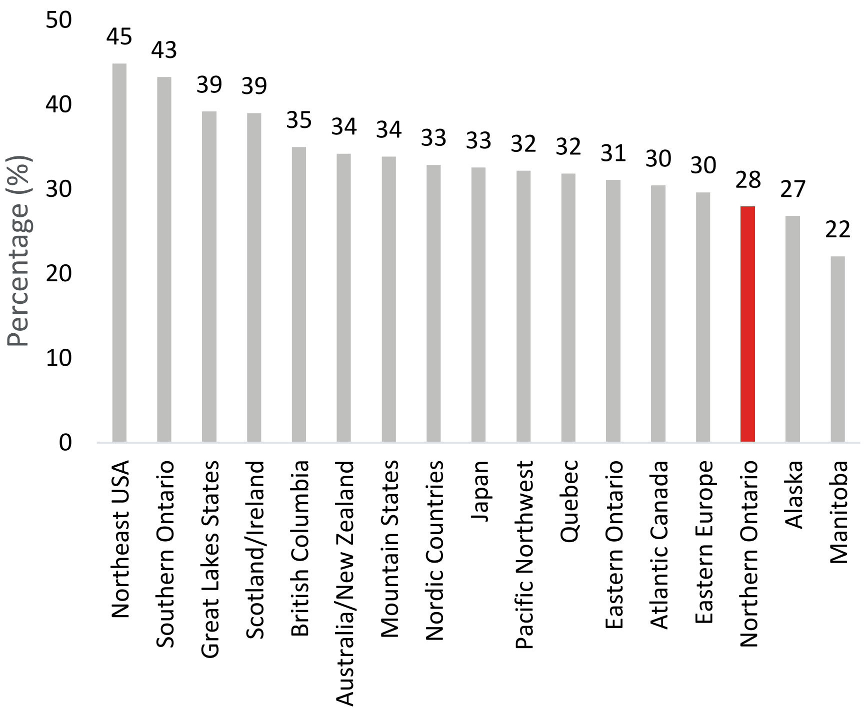
Paddlers who visit Northern Ontario enjoy the experience-targeted efforts can help turn interest into action.

PADDLERS

While paddlers show a low likelihood to visit Northern Ontario (28%), those who do are relatively satisfied, with a 59% likelihood to recommend.

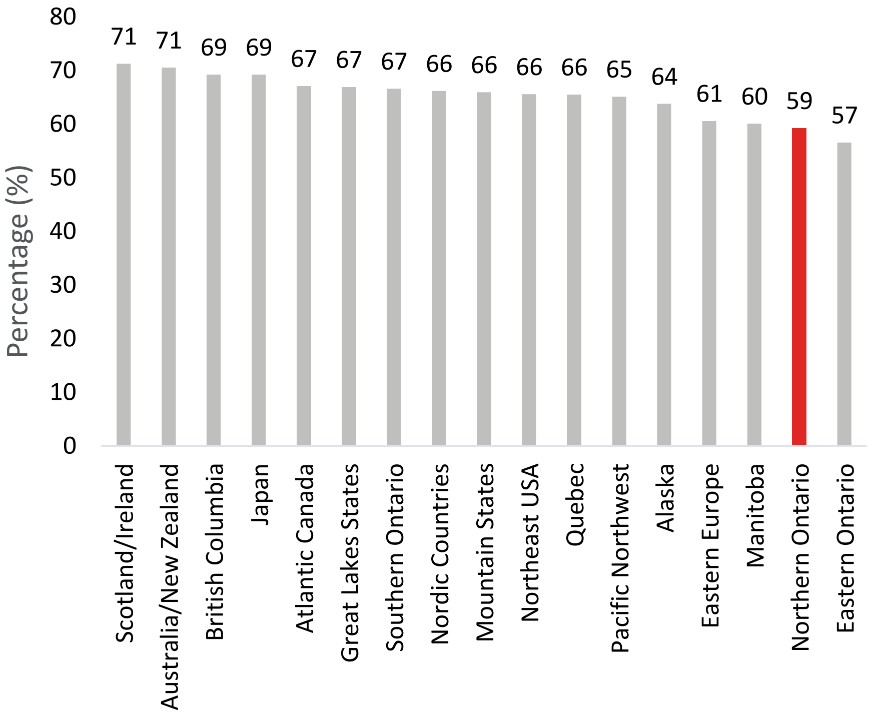
This gap suggests that **while the region offers strong paddling experiences, it struggles to attract travellers in the first place.** To bridge the disconnect, it is suggested that Northern Ontario focus on converting interest into action.

LIKELIHOOD TO VISIT



Q: And how likely are you to visit each of the following destinations for a holiday/vacation over the next 2-3 years? (Top 3 Box)

LIKELIHOOD TO RECOMMEND



Q: How likely, if at all, would you be to recommend the following tourism destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

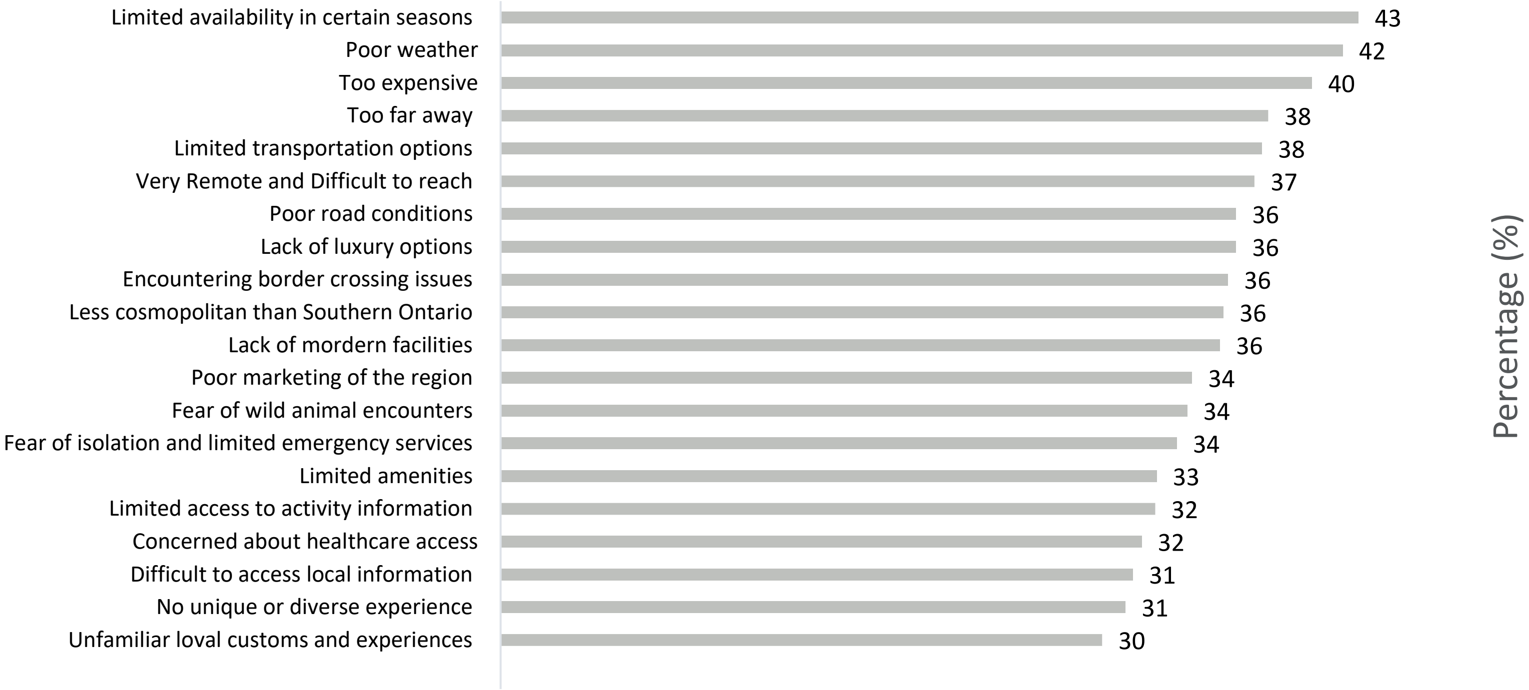
Barriers

Seasonality and poor weather are key barriers for paddlers, given the nature of water-based activities.

Paddlers face significant barriers when considering Northern Ontario, with seasonal availability and poor weather limiting access to its waterways.

Unlike land-based activities, **water-based adventures are highly dependent on stable weather conditions, making uncertainty a key deterrent.**

BARRIERS



Q: Which of the following are the most important perceptions and beliefs when traveling to Northern Ontario? (Considering travellers main concerns)

Path to Purchase

While paddlers who have experienced water-based activities in Northern Ontario show strong advocacy, the intent to travel remains low.

Familiarity

22%

Paddlers low familiarity with Northern Ontario at 22% suggests that **the region is not widely recognized for unique water-based experiences.**

Impression

63%

Once discovered, Northern Ontario is well-regarded as a destination for water-based activities and receives a positive impression score of 63%.

Travel Intent

28%

With nearly a third of paddlers expressing intent to visit, there is strong interest. However, **there is an opportunity to address barriers and enhance conversion.**

Advocacy

59%

A majority of paddlers who have visited Northern Ontario would recommend it to others **with an advocacy rate of 59% suggesting a satisfying travel experience.**

(Re) Position the region as a paddling destination.

- **Travellers don’t naturally think of Northern Ontario as a paddling destination.**
  Northern Ontario’s paddling experiences are strong, but low awareness means potential travellers don’t think of it for water activities.
- **Product experience is good, implying awareness is the issue.**
  Travellers that visit and experience the activities offered are satisfied and are likely to recommend. There is a need to attract more travellers through awareness.
- **Targeted awareness drives higher conversion.**
  Driving awareness among targeted traveller groups is key to higher conversion between a good perception and high intention to travel.

Franco Travellers

3.1M
(Travellers)

$11B
(Market Size)

French speaking travellers looking for destinations with a strong francophone presence and culture. They seek language, heritage and cultural connections in their travels.

Activities

Francophone Tourism

Channels

Demographics

- Majority Female (51%), Average Spend ($3,508), Average Income ($97,624)
- Skews to Young Cohorts: 18-24yrs (14%,), 25-34yrs (21%) and 35-44yrs (18%)
- Mainly Medium-income bracket (55%, 95)

Trip Traits

- Small group size
- Medium trip
- Likely to travel in June, July or August

Source Markets

USA	UK	Canada
33%	31%	36%

Media Habits & Travel Behaviour

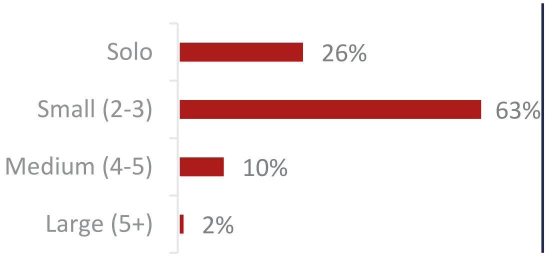
Franco travellers prefer visiting Northern Ontario in summer (June–August), with strong interest in sporting events-making events a key draw for this market.

FRANCO TRAVELLERS

SPORTING INTERESTS

57% 122	48% 118	48% 121	45% 138	44% 120
41% 120	40% 113	40% 119	37% 127	33% 119

SIZE OF PARTY



TRIP DURATION

Day & Overnight Trip (1-2 days)	12%
Short Trip (3-5days)	33%
Medium Trip (6 - 10 days)	38%
Long Trip (11 or more days)	18%

CHANNELS

	Absolute	Index			
GOOGLE/OTHER SEARCH ENGINE	52	94	REFERRALS & RECOMMENDATIONS - Friends	33	88
DESTINATION WEBSITES	42	101	AIRLINE WEBSITE	30	106
SOCIAL MEDIA CHANNELS - YouTube	42	105	SOCIAL MEDIA CHANNELS - TikTok	27	112
TRAVEL REVIEW SITES - Trip Advisor	40	104	TRAVEL REVIEW SITES - not Trip Advisor	24	114
HOTEL/RESORT WEBSITE	39	100	TELEVISION/STREAMING - Travel shows	21	107
SOCIAL MEDIA CHANNELS - Facebook	33	108	MEDIA INFLUENCERS - Travel bloggers	20	112
SOCIAL MEDIA CHANNELS - Instagram	33	108	REFERRALS & RECOMMENDATIONS - Travel agents/Tour operators	17	101

MONTH OF TRAVEL

JAN	FEB	MAR	APR	MAY	JUN
5% 86	7% 83	9% 89	13% 116	18% 97	21% 93
JUL	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**
27% 110	20% 109	16% 88	9% 88	4% 73	9% 113

INDEX COLOUR LEGEND: 🟥 Less relevant, relative to average score 🟩 More relevant, relative to average score

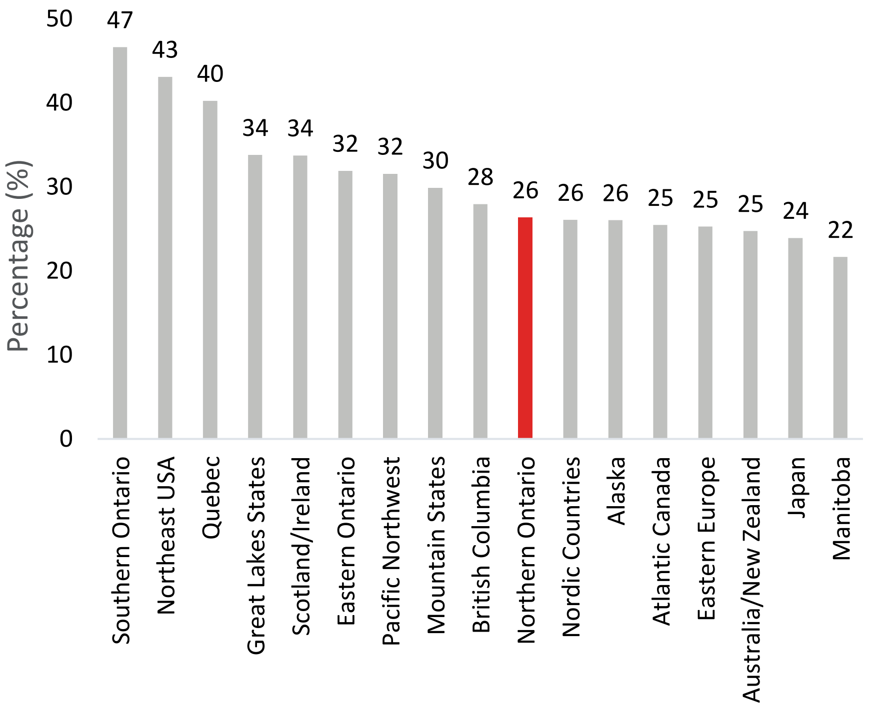
Awareness

Northern Ontario has room to grow with Franco travellers-positive perceptions signal strong potential.

Northern Ontario is less familiar to Franco travellers (26%) but leaves a good impression (64%) among those who know it. This signals untapped potential.

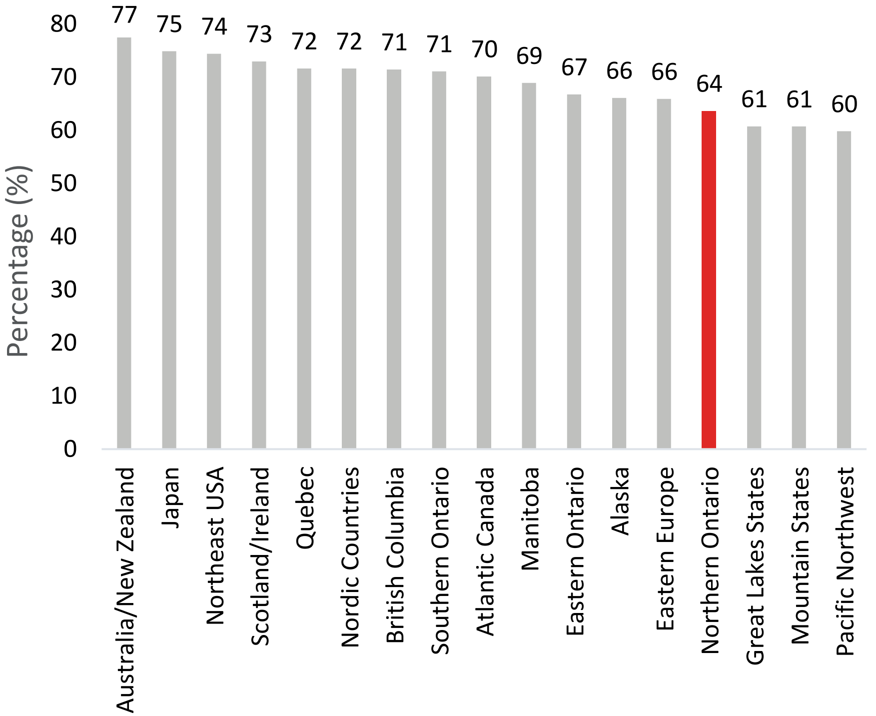
By increasing visibility in Francophone media and offering bilingual, culturally relevant experiences, operators can attract more travellers from this market.

FAMILIARITY



Q: How familiar are you with each of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

IMPRESSION



Q: What is your overall impression of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

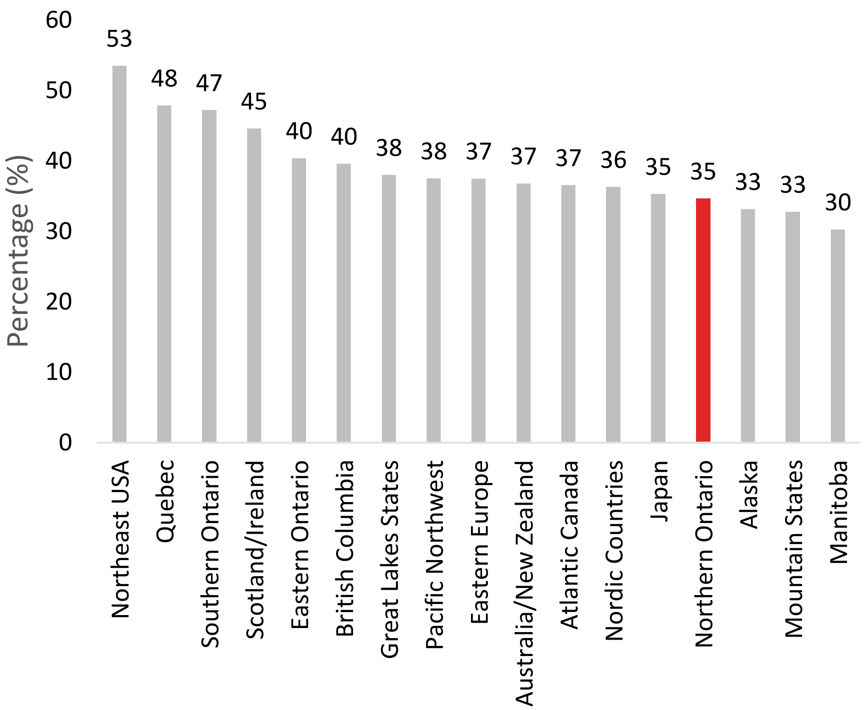
Interest and Advocacy

Franco travellers are ready to recommend Northern Ontario-removing barriers can help convert interest into visits.

Franco travellers show moderate intent to visit Northern Ontario, but key travel barriers may be limiting conversion.

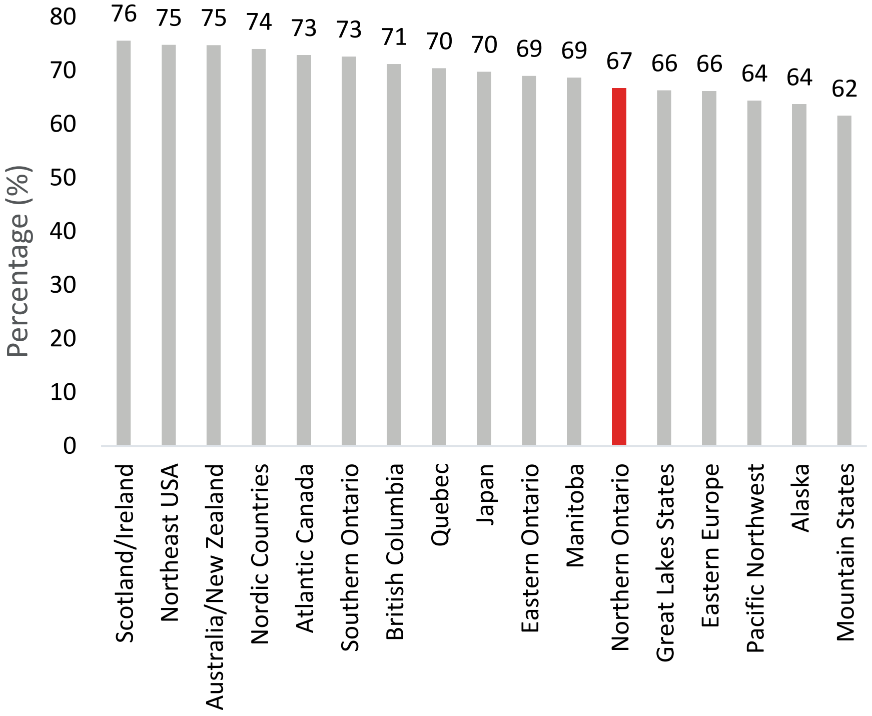
Despite this, **those who do visit are highly likely to recommend it, signalling strong potential for organic advocacy.** To turn the positive sentiment into increased visitation, Northern Ontario could address barriers and enhance tailored experiences for Francophones.

LIKELIHOOD TO VISIT



Q: And how likely are you to visit each of the following destinations for a holiday/vacation over the next 2-3 years? (Top 3 Box)

LIKELIHOOD TO RECOMMEND



Q: How likely, if at all, would you be to recommend the following tourism destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

Barriers

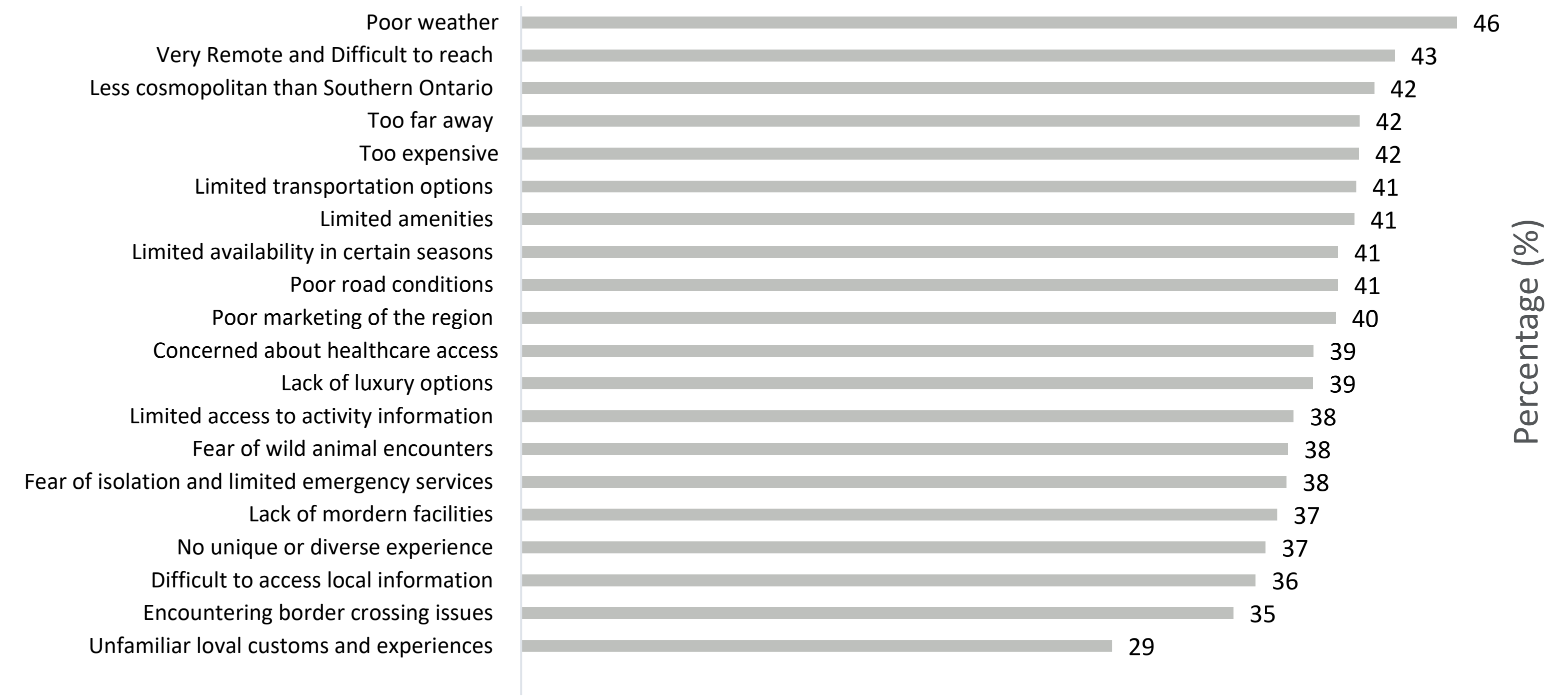
Reducing accessibility barriers can help Northern Ontario compete for Franco travellers.

FRANCO TRAVELLERS

Franco travellers see poor weather, remoteness, and lack of a cosmopolitan feel as key barriers.

Many are more comfortable with Southern Ontario. To compete, Northern Ontario should potentially highlight its unique nature, French heritage, and authenticity of experiences to shift perceptions and attract this market.

BARRIERS



Q: Which of the following are the most important perceptions and beliefs when traveling to Northern Ontario? (Considering travellers main concerns)

Path to Purchase

Travellers have a positive perception of Northern Ontario’s Francophone offerings and a high advocacy rate, but familiarity remains low.

Familiarity

26%

The low familiarity at 26% reflects a **need to increase visibility** within the Francophone community.

Impression

64%

A significant portion of Franco travellers have a positive impression of Northern Ontario, indicating **a strong reputation within the community.**

Travel Intent

35%

While Franco travellers show moderate intent to visit Northern Ontario, addressing travel barriers and **offering tailored packages can boost conversion**

Advocacy

67%

The high advocacy among Franco travellers reflects a positive experience. This **word-of-mouth is a powerful tool for attracting new travellers.**

Lower awareness and travel intent remains a consistent theme.

Low awareness of offerings impacts the path to purchase.
A common theme across all – is low awareness. If travellers are not aware of the destination's offerings, they are less likely to come.

But overall impression is high.
Across all segments, including Franco Travellers, the product offering is attractive, but barriers drive down travel intent.

There is a need to shift the narrative on barriers.
There is a need to reduce barriers especially accessibility and weather concerns. The second option is to highlight urban and cultural offerings in Northern Ontario that align with Franco travellers' preference for cosmopolitan, comfortable, and culturally rich experiences.

2.4M
(Travellers)

$8.9B
(Market Size)

Outdoor Explorers

People who enjoy outdoor activities in natural settings. Whether hiking, camping or exploring remote areas, they seek fresh air and open space. 96% are likely to take an overnight holiday in the next 3 years.

Activities

- Camping / Hiking
- Boating
- Angling / Fishing

Channels

Demographics

- Majority Male (59%), Average Spend ($3,682), Average Income ($95,050)
- Skews to Young Cohorts: 18-24yrs (11%,), 25-34yrs (19%) and 35-44yrs (21%)
- Mainly Medium-income bracket (59%, 102)

Trip Traits

- Small group size
- Medium trip
- Likely to travel in May, June, July & August

Source Markets

USA	UK	Canada
36%	24%	39%

Media Habits & Travel Behaviour

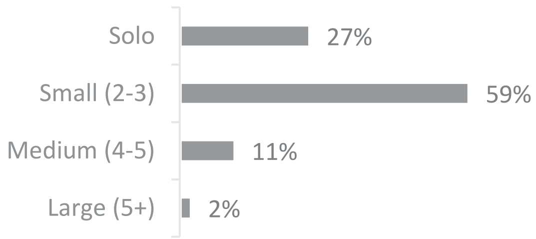
Outdoor explorers rely on Google and YouTube for inspiration, visit more often in winter, and show strong interest in hockey and fishing.

OUTDOOR EXPLORERS

SPORTING INTERESTS

Hockey	48%	104
Fishing Derbies	47%	142
Snowmobile Races	42%	106
Softball / Baseball	42%	102
Cycling Races	37%	100
Skiing Races	33%	97
Canoe / Kayak Races	32%	90
Curling Bonspiels	27%	97
Trail Running	27%	81
Ultimate Frisbee	26%	91

SIZE OF PARTY



TRIP DURATION

Day & Overnight Trip (1-2 days)	14%
Short Trip (3-5days)	35%
Medium Trip (6 - 10 days)	39%
Long Trip (11 or more days)	13%

CHANNELS

	Absolute	Index
GOOGLE/OTHER SEARCH ENGINE	51	93
SOCIAL MEDIA CHANNELS - YouTube	41	105
DESTINATION WEBSITES	38	90
REFERRALS & RECOMMENDATIONS - Friends	36	94
SOCIAL MEDIA CHANNELS - Facebook	35	113
TRAVEL REVIEW SITES - Trip Advisor	34	87
HOTEL/RESORT WEBSITE	32	80
SOCIAL MEDIA CHANNELS - Instagram	29	94
SOCIAL MEDIA CHANNELS - TikTok	25	105
AIRLINE WEBSITE	23	80
TELEVISION/STREAMING - Travel shows	19	98
REFERRALS & RECOMMENDATIONS - Travel agents/Tour operators	18	105
TRAVEL REVIEW SITES - not Trip Advisor	17	80
MEDIA INFLUENCERS - Travel bloggers	17	94

MONTH OF TRAVEL

JAN	FEB	MAR	APR	MAY	JUN
9%	12%	9%	11%	17%	23%
170	140	86	103	95	102
JUL	**AUG**	**SEP**	**OCT**	**NOV**	**DEC**
21%	17%	15%	8%	6%	10%
88	91	82	81	106	132

INDEX COLOUR LEGEND: 🟥 Less relevant, relative to average score 🟩 More relevant, relative to average score

Awareness

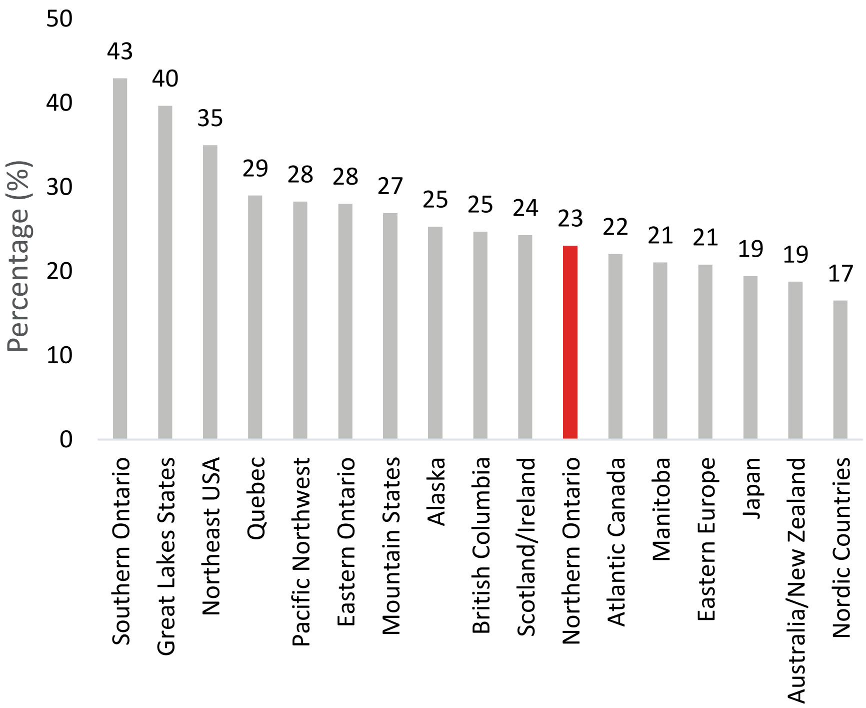
→ Outdoor explorers value Northern Ontario’s experiences-but more visibility is needed to drive visits.

OUTDOOR EXPLORERS

Northern Ontario ranks lower in familiarity among outdoor explorers, with only 23% recognizing it as a potential destination, placing it behind other nearby regions like Southern Ontario and the Great Lakes States.

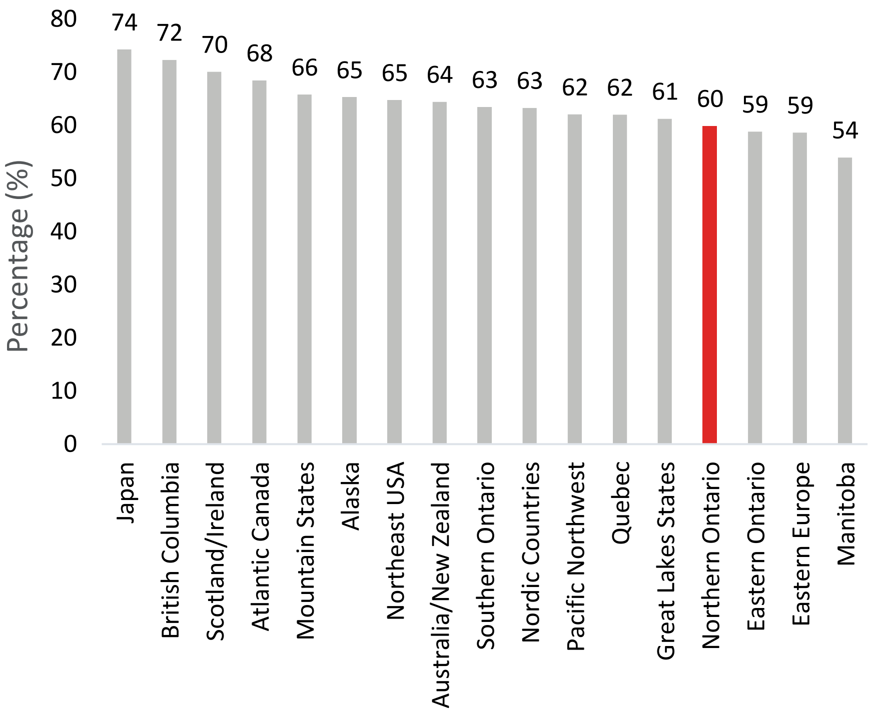
However, its impression score of 60% suggests that **those who are familiar with the region hold it in high regard for outdoor activities, appreciating its natural beauty and unique experiences.**

FAMILIARITY



Q: How familiar are you with each of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

IMPRESSION



Q: What is your overall impression of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

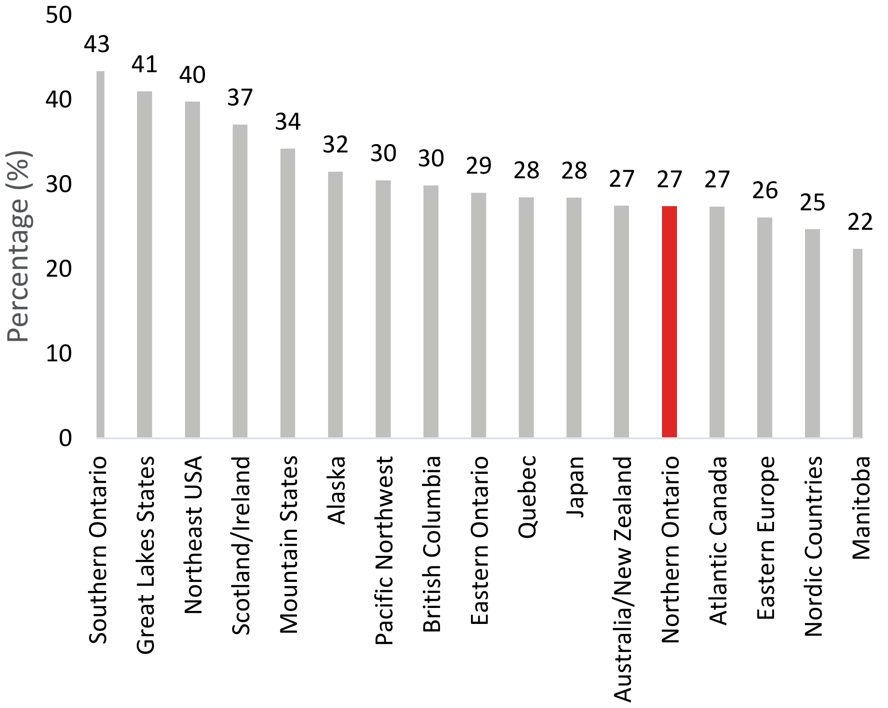
OUTDOOR EXPLORERS

Interest and Advocacy

Northern Ontario has strong recommendation potential, despite lower visitation intent amongst outdoor explorers.

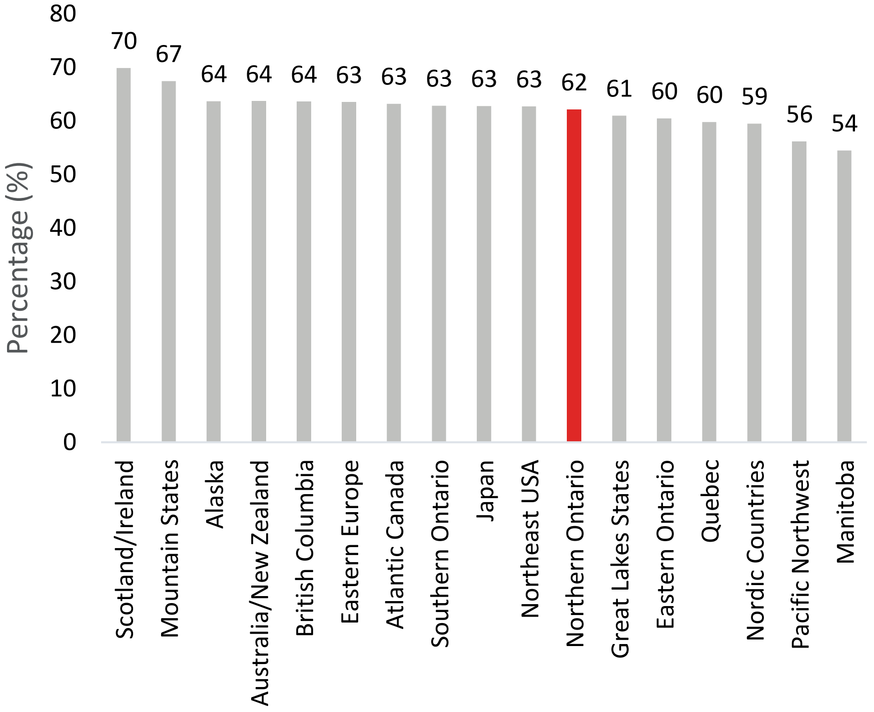
While outdoor explorers are more likely to visit Northern Ontario than destinations like Eastern Europe and the Nordic Countries, Southern Ontario leads in visitation intent with a score of 43%. However, Northern Ontario's likelihood to recommend is on par with Southern Ontario, signalling strong word-of-mouth potential despite its lower visitation numbers. There is potential for Northern Ontario to turn strong recommendations into increased visits.

LIKELIHOOD TO VISIT



Q: And how likely are you to visit each of the following destinations for a holiday/vacation over the next 2-3 years? (Top 3 Box)

LIKELIHOOD TO RECOMMEND



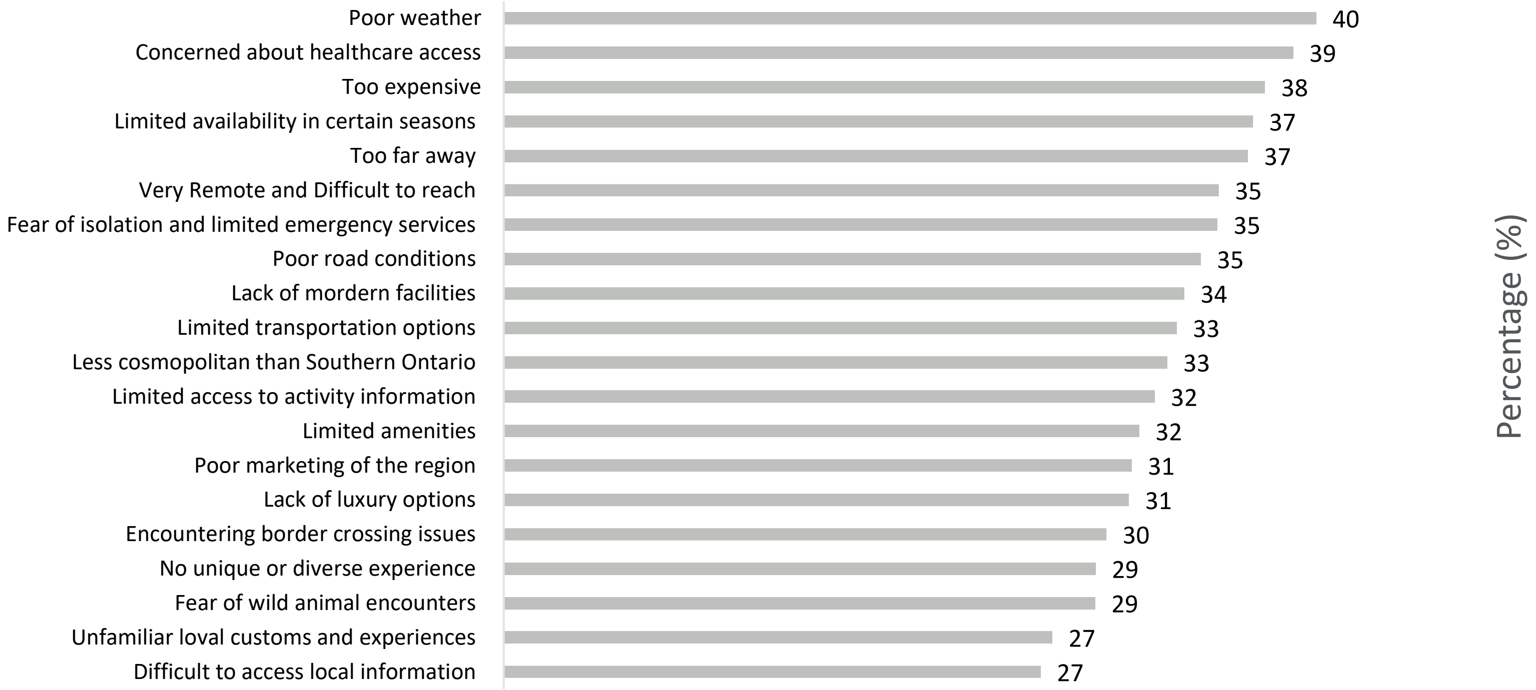
Q: How likely, if at all, would you be to recommend the following tourism destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

Barriers

Addressing health, weather, and cost concerns can make Northern Ontario more appealing to outdoor explorers.

For outdoor explorers, key barriers to visiting Northern Ontario include limited healthcare access, poor weather, and high costs. **Given the physically demanding nature of outdoor activities, access to healthcare is crucial for ensuring safety and peace of mind.** Additionally, the region's unpredictable weather can make planning difficult while the cost of travels add an additional challenge.

BARRIERS



Q: Which of the following are the most important perceptions and beliefs when traveling to Northern Ontario? (Considering travellers main concerns)

Path to Purchase

Familiarity and intent to travel are moderate, but Northern Ontario's outdoor activities are viewed positively, with strong post-visit advocacy.

Familiarity

23%

The low familiarity among outdoor explorers indicates that **Northern Ontario is not a primary consideration when planning their trips.**

Impression

60%

The destination is **well-regarded for outdoor activities** due to its natural beauty and unique outdoor experience.

Travel Intent

27%

Outdoor explorers show interest in visiting, but **addressing barriers like logistics, trip planning, and distance is key to converting intent into action.**

Advocacy

62%

The **strong sense of satisfaction and willingness to recommend** reflects Northern Ontario's beauty and unique outdoor experiences.

If they're coming to Southern Ontario, they can come to Northern Ontario.

+ **Southern Ontario closely competes for Outdoor Explorers.**
While this may seem like a constraint, it may present an opportunity to tap into travellers considering Southern Ontario for outdoor activities.

+ **Lifting key barriers to visitation could invite travellers.**
Given the physically demanding nature of outdoor activities, access to healthcare is crucial for ensuring safety and peace of mind.

+ **Reframing the opportunity as an "off-the-beaten-path" experience.**
Travellers are increasingly looking for new experiences. Positioning Northern Ontario to Outdoor Explorers as an off-the-beaten-path experience, could be a way to invite them to the region.

Road Adventurers

2.1M
(Travellers)

$6.5B
(Market Size)

Travellers who seek excitement through engine-powered experiences. Whether on-road or off-road, they explore new terrains with a passion for movement, embracing Northern Ontario’s rugged landscapes and vast open spaces as their outdoor playground.

Activities

- Cycling
- Snowmobiling
- ATV-ing
- Auto/RV Touring

Channels

Demographics

- Majority Male (61%), Average Spend ($3,047), Average Income ($97,331)
- Skews to Young Cohorts: 18-24yrs (21%,), 25-35yrs (24%) and 35-44yrs (21%)
- Mainly Medium-income bracket (47%, 107)

Trip Traits

- Small group size
- Short trip
- Likely to travel in June, July or August

Source Markets

USA	UK	Canada
37%	31%	32%

Skift
ADVISORY

Media Habits & Travel Behaviour

Road travellers, driven by social media, visit more in winter, travel in small groups, and show the highest interest in organized sports events.

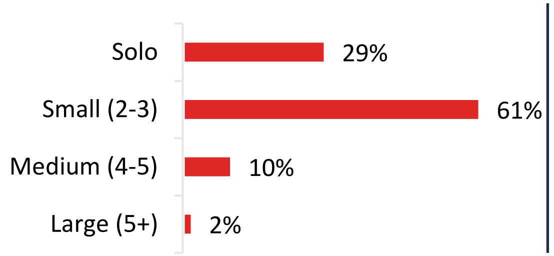
SPORTING INTERESTS

Snowmobile Races	62%	157
Hockey	56%	120
Cycling Races	56%	152
Skiing Races	55%	159
Softball / Baseball	54%	133
Trail Running	51%	154
Fishing Derbies	50%	149
Canoe / Kayak Races	49%	138
Ultimate Frisbee	48%	165
Curling Bonspiels	43%	158

CHANNELS

	Absolute	Index			
SOCIAL MEDIA CHANNELS – YouTube	48	121	TRAVEL REVIEW SITES – Trip Advisor	30	76
GOOGLE/OTHER SEARCH ENGINE	43	78	SOCIAL MEDIA CHANNELS – Twitter	26	188
SOCIAL MEDIA CHANNELS – Instagram	41	132	AIRLINE WEBSITE	26	89
SOCIAL MEDIA CHANNELS – Facebook	40	129	REFERRALS AND RECOMMENDATIONS -Friends	25	67
SOCIAL MEDIA CHANNELS – Tik Tok	36	148	SOCIAL MEDIA CHANNELS – Pinterest	24	173
HOTEL/RESORT WEBSITE	34	87	MEDIA INFLUENCERS – Travel Bloggers	23	125
DESTINATION WEBSITES	31	75	SOCIAL MEDIA CHANNELS – Snapchat	20	180

SIZE OF PARTY



TRIP DURATION

Day & Overnight Trip (1-2 days)	19%
Short Trip (3-5days)	32%
Medium Trip (6 - 10 days)	37%
Long Trip (11 or more days)	12%

MONTH OF TRAVEL

JAN	FEB	MAR	APR	MAY	JUN
9%	12%	10%	14%	15%	25%
159	146	94	123	80	110

JUL	AUG	SEP	OCT	NOV	DEC
25%	18%	8%	4%	5%	13%
104	96	46	44	97	167

INDEX COLOUR LEGEND: 🟥 Less relevant, relative to average score 🟩 More relevant, relative to average score

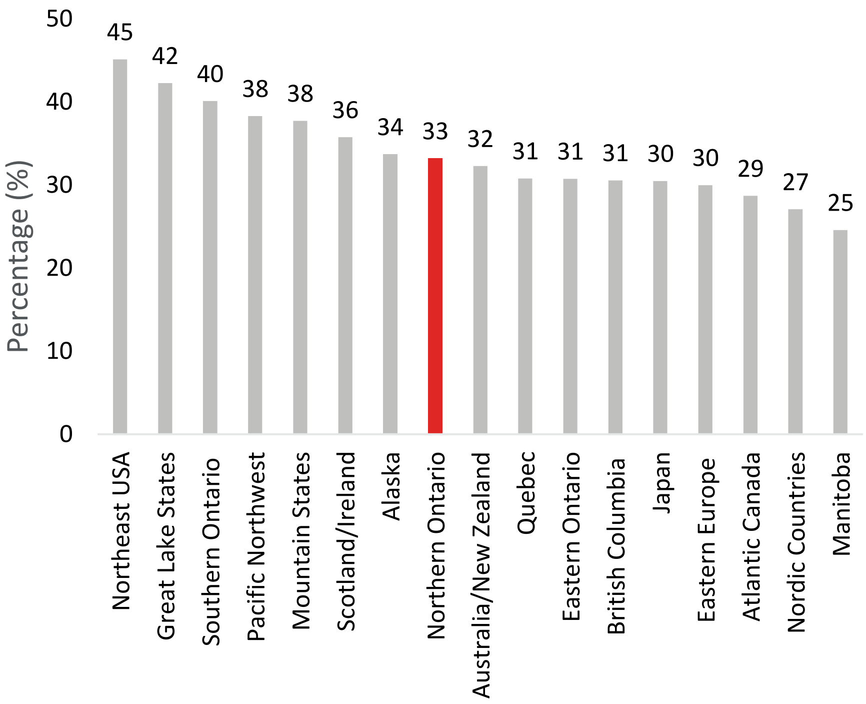
Awareness

Northern Ontario is familiar to road adventurers but needs to improve standout appeal.

Northern Ontario has the highest familiarity among road adventurers as compared to other traveller segments which is likely driven by local and weekend travellers.

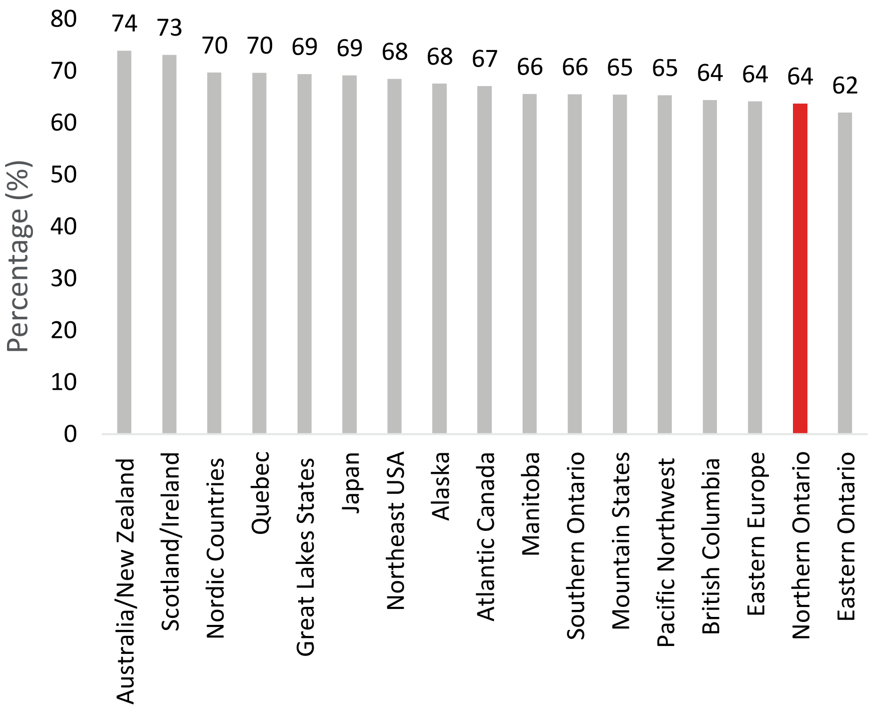
Additionally, those who are familiar with Northern Ontario have a positive impression, drawn to its scenic routes, open landscapes, and distinctive roadside experiences.

FAMILIARITY



Q: How familiar are you with each of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

IMPRESSION



Q: What is your overall impression of the following destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

Interest and Advocacy

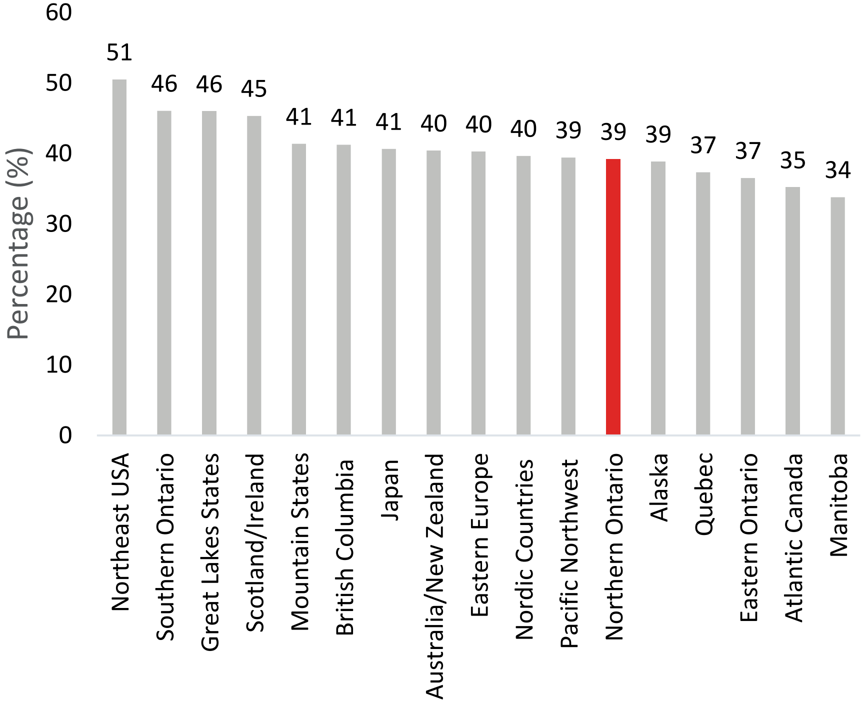
Road travellers are the most likely segment to visit Northern Ontario and are also highly likely to recommend it, indicating a positive road outdoor experience.

ROAD ADVENTURERS

Road travellers are the most likely segment to visit Northern Ontario, with 39% expressing an intent to visit, likely driven by the accessibility and appeal of road trips within the domestic market.

Despite this, there is a gap between the positive impression of the region and actual likelihood to visit, suggesting that while road adventurers recognize Northern Ontario's value, they are still not fully converted into travellers.

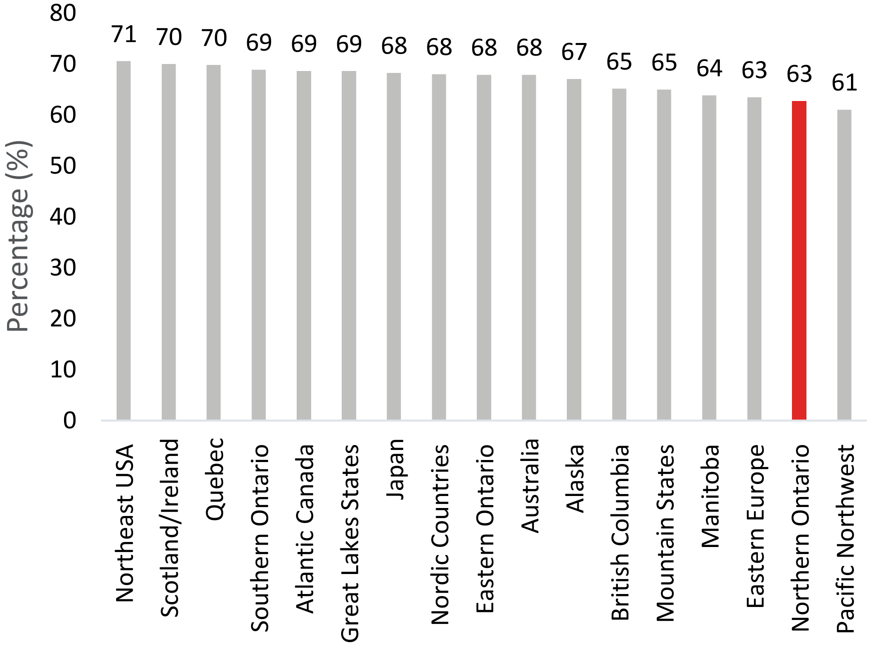
LIKELIHOOD TO VISIT



Northeast USA	51
Southern Ontario	46
Great Lakes States	46
Scotland/Ireland	45
Mountain States	41
British Columbia	41
Japan	41
Australia/New Zealand	40
Eastern Europe	40
Nordic Countries	40
Pacific Northwest	39
Northern Ontario	39
Alaska	39
Quebec	37
Eastern Ontario	37
Atlantic Canada	35
Manitoba	34

Q: And how likely are you to visit each of the following destinations for a holiday/vacation over the next 2-3 years? (Top 3 Box)

LIKELIHOOD TO RECOMMEND



Northeast USA	71
Scotland/Ireland	70
Quebec	70
Southern Ontario	69
Atlantic Canada	69
Great Lakes States	69
Japan	68
Nordic Countries	68
Eastern Ontario	68
Australia	68
Alaska	67
British Columbia	65
Mountain States	65
Manitoba	64
Eastern Europe	63
Northern Ontario	63
Pacific Northwest	61

Q: How likely, if at all, would you be to recommend the following tourism destinations in terms of what they have to offer as holiday/vacation travel experiences? (Top 3 Box)

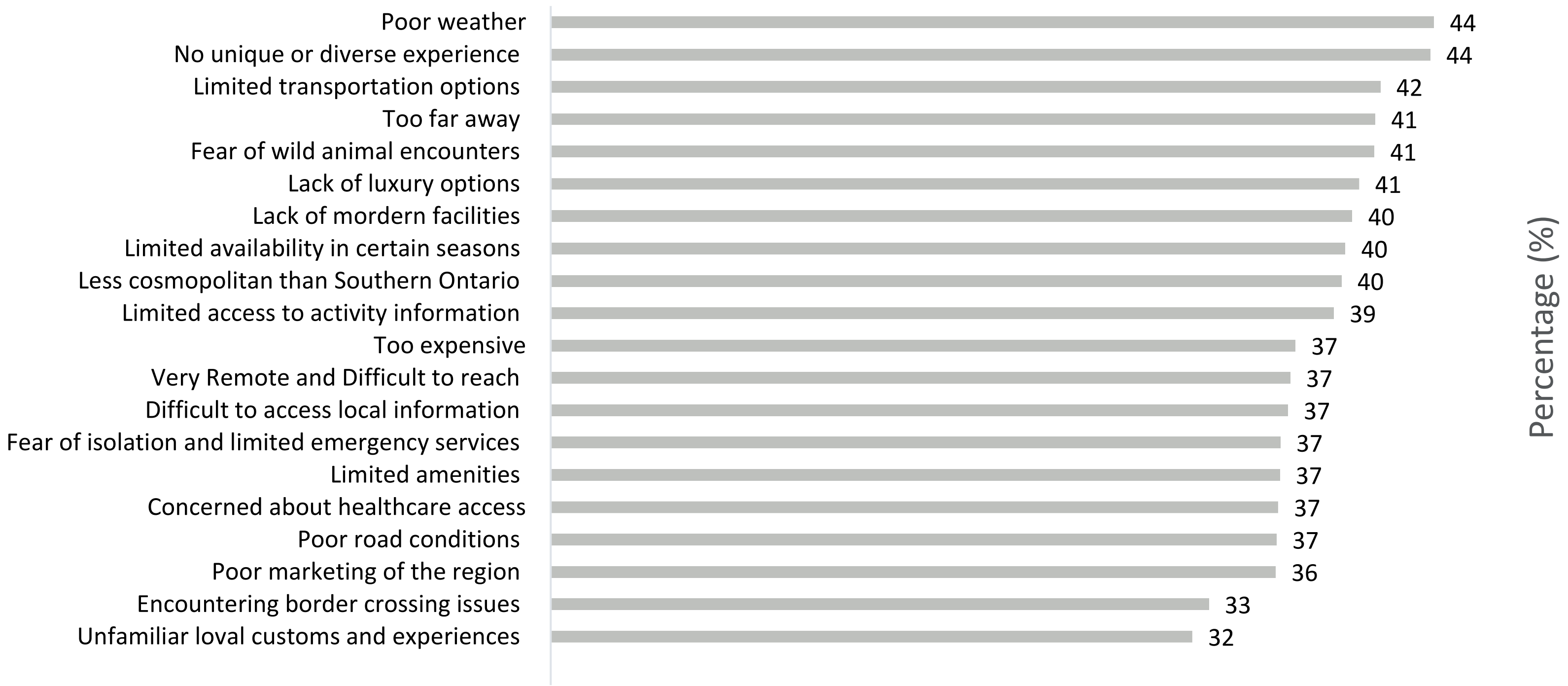
Barriers

No unique or diverse experiences and limited transportation options are key barriers amongst road adventurers that Northern Ontario need to address.

Perceptions of poor weather, limited unique experiences, and inadequate transportation options are key barriers limiting Northern Ontario's appeal as a travel destination.

To overcome this, the region should prioritize improving transportation infrastructure and showcasing its unique offerings. Addressing these barriers could shift perceptions and encourage more travellers to visit.

BARRIERS



Q: Which of the following are the most important perceptions and beliefs when traveling to Northern Ontario? (Considering travellers main concerns)

Path to Purchase

Road adventurers show the highest familiarity and intent to visit Northern Ontario among all traveller segments.

Familiarity

33%

Northern Ontario has the highest awareness among road adventurers, likely driven by road trippers, weekend travellers, and locals from other parts of Ontario.

Impression

64%

Road adventurers have a **positive impression** of Northern Ontario, likely **influenced by its open roads, scenic landscapes, and unique roadside experiences.**

Travel Intent

39%

Road adventurers have the highest intent to visit among all traveller segments, signalling a **prime opportunity to convert interest into action.**

Advocacy

63%

The high advocacy rate suggests that **the region delivers well on expectations for scenic road adventures.**

Solving barriers to visitation will lead to higher conversion.

Road adventurers show the highest likelihood to visit.
Among all traveller segments, road adventurers show the highest level of familiarity and travel intent to the region.

Despite this, a conversion gap persists.
There is a gap between the positive impression of the region and actual likelihood to visit. So, while road adventurers recognize Northern Ontario’s value, they are still not fully converted into travellers.

Easing barriers to travel, could be key to bridging the gap.
Given that awareness and intent are higher than others, solving for travel barriers could present the easiest opportunity to convert interest into travel.

05

PRODUCT LANDSCAPE

OVERVIEW

Northern Ontario is perfectly positioned and is home to a multitude of outdoor activities that catch the eye and interest of activity-based traveller segments. The product landscape can be described as “something for everyone” – from thrill seekers looking for water or snow sport to families seeking out fun adventures to make meaningful memories.

SECTION OVERVIEW

Objective:

The objective of this section is to provide details on existing products that Northern Ontario offers travellers. It assesses the current perceptions of products, how travellers associate different attributes to the destinations offering and the conversion trends across the seasons.

Contents:

Products are analyzed across three methods:

- Survey scores on destination appeal for each product.
- Survey scores on attributes associated with the destinations offering of that product.
- Digital listening trends to assess the best marketing windows for highest conversion.

Outcome:

Destination developers, marketers and tourism product owners can use the information provided to understand key areas of improvement across products and identify key competitor destinations that offer similar products and compete for Northern Ontario's market share.

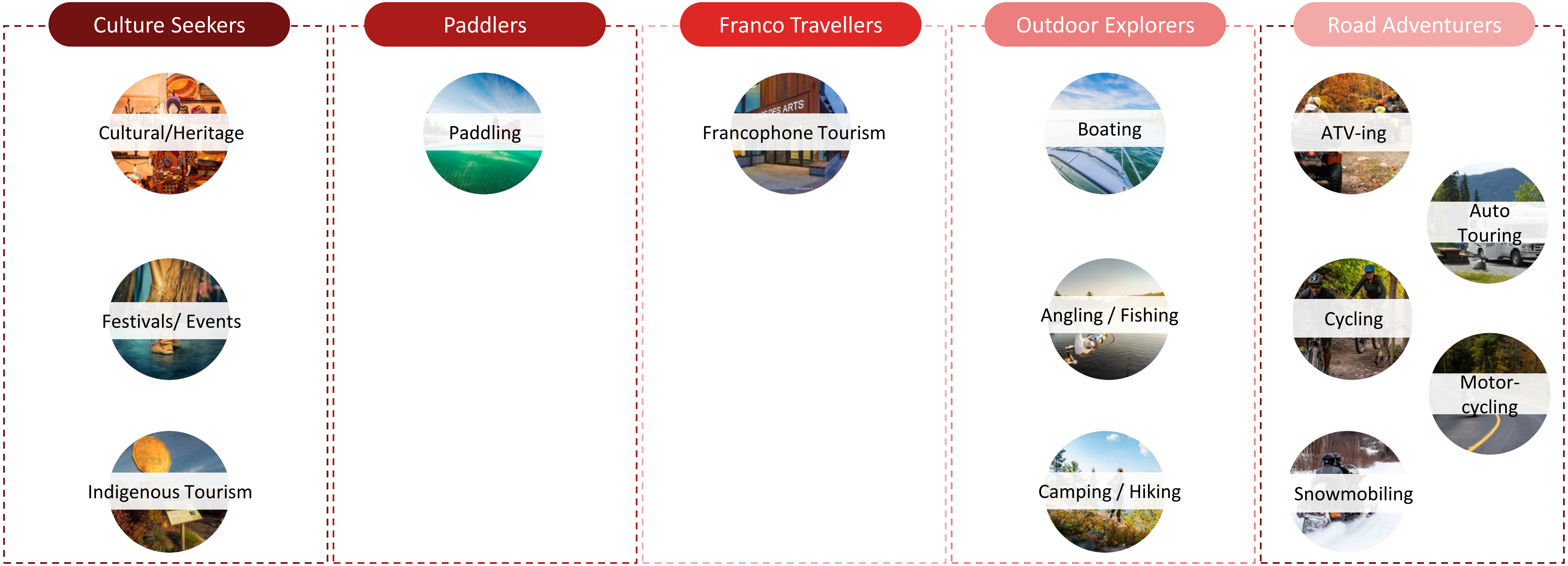
QUICK LINKS

Culture/Heritage	Angling/Fishing
Festival/Events	Camping/Hiking
Indigenous Tourism	ATV-ing
Paddling	Cycling
Francophone Tourism	Snowmobiling
Boating	RV Touring

Click on the above to jump to the relevant section.

Northern Ontario’s Product Landscape

Northern Ontario offers a wide range of outdoor and culture products that cater to the key traveller segments



Culture Seekers
- Cultural/Heritage
- Festivals/ Events
- Indigenous Tourism

Paddlers
- Paddling

Franco Travellers
- Francophone Tourism

Outdoor Explorers
- Boating
- Angling / Fishing
- Camping / Hiking

Road Adventurers
- ATV-ing
- Auto Touring
- Cycling
- Motor-cycling
- Snowmobiling

CULTURE/ HERITAGE

01

Low overall appeal, but strength in Indigenous and local stories.

Northern Ontario ranks lowest in culture and heritage appeal but stands out for Indigenous experiences, small-town charm, and local storytelling-offering a unique angle to build on.

Winter is the prime season for cultural travel conversations.

Digital conversations around cultural travel peak in winter, led by Scotland/Ireland, with strong positive sentiment. This is the key window when cultural experiences are top of mind for travellers.

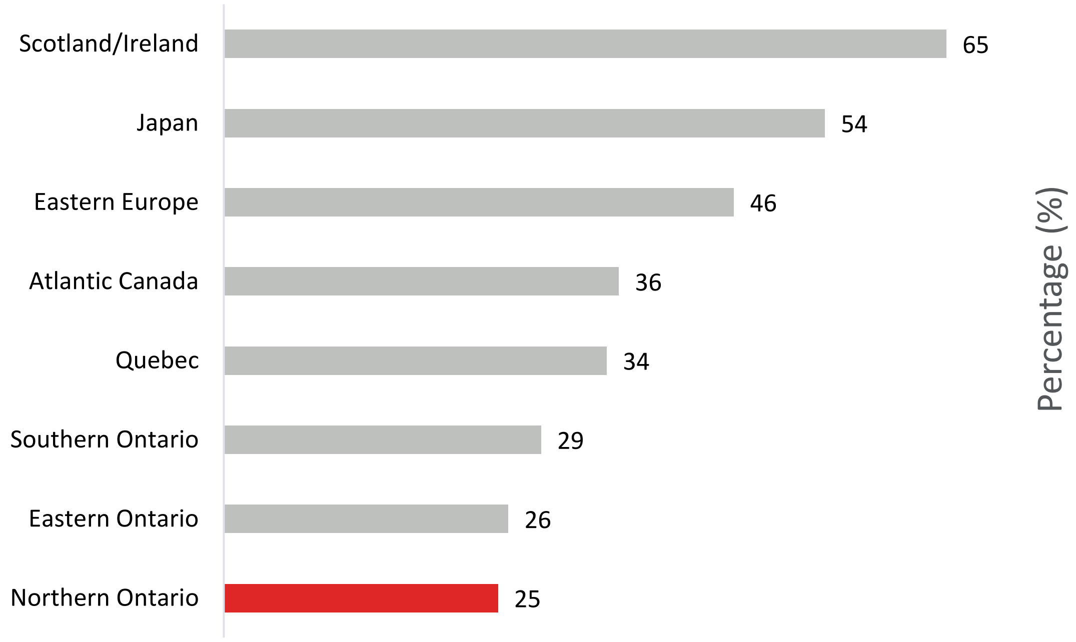
Opportunity to build a stronger cultural narrative.

Northern Ontario can grow its presence by amplifying its authentic cultural and heritage offerings-tapping into growing interest during winter and differentiating from competitors like Quebec, which struggles with negative sentiment.

Appeal and Associations

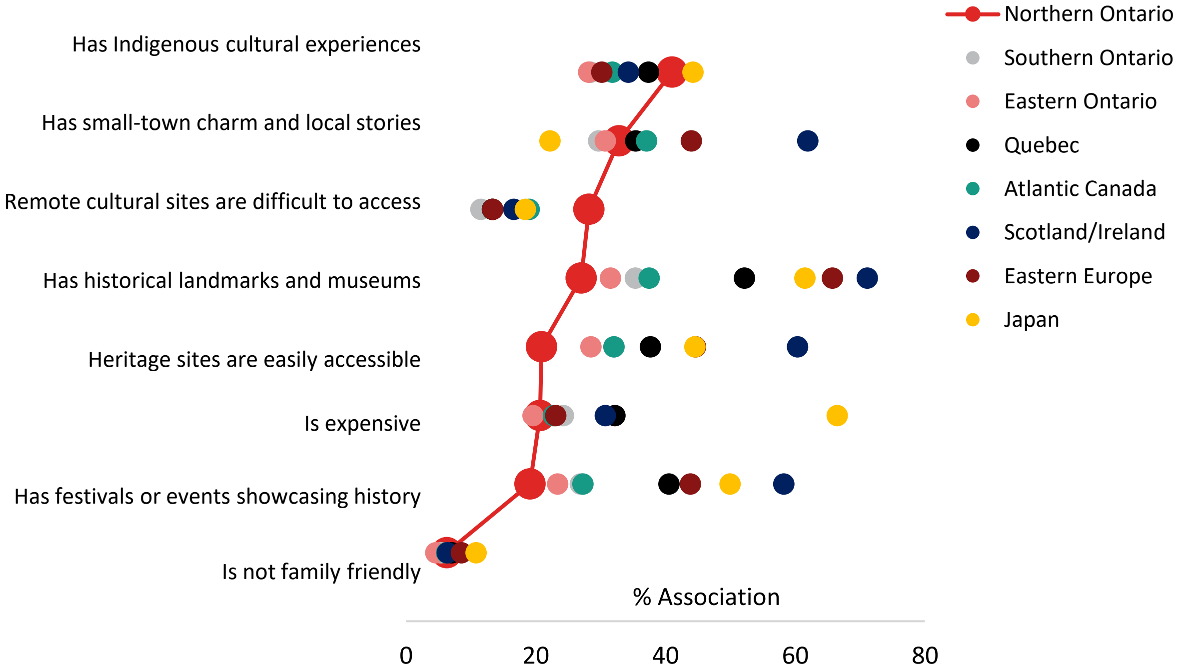
Northern Ontario has the lowest appeal for Culture and Heritage among its competitors, though it stands out for Indigenous cultural experiences, small-town charm, and local stories.

APPEAL



Q: When thinking about Culture and Heritage when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

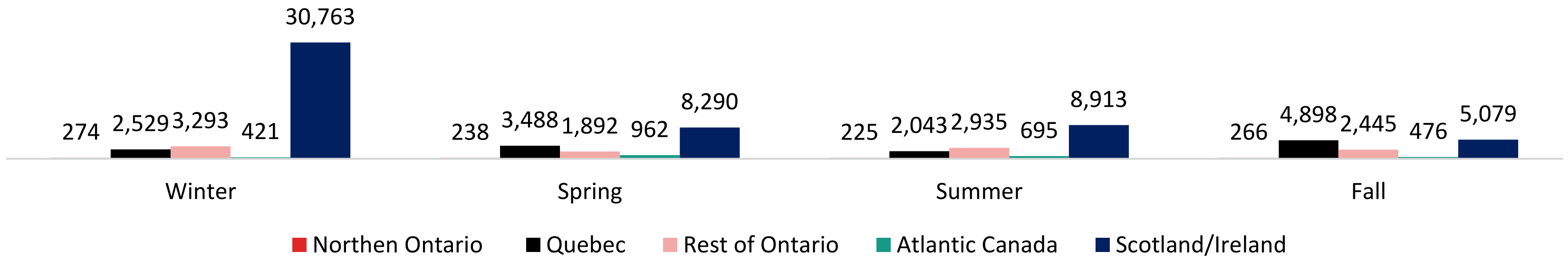


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Culture and Heritage attractions

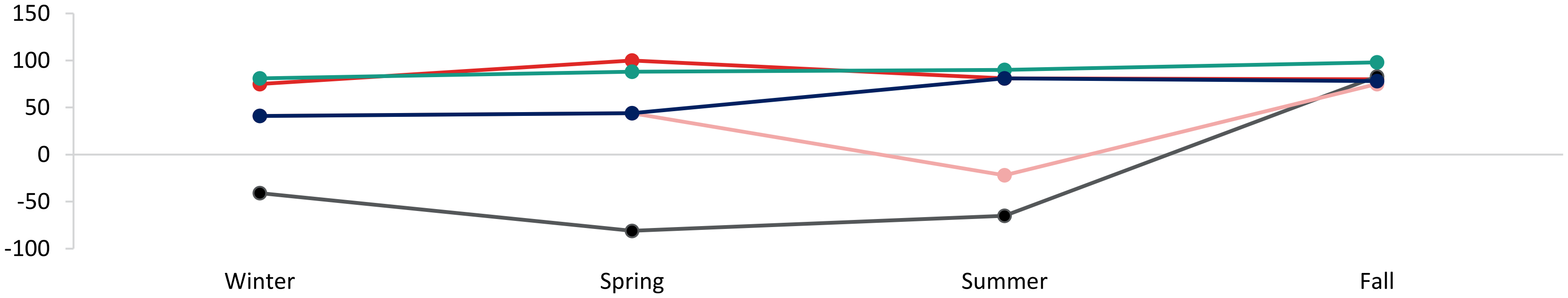
Conversation Trends

Culture and heritage conversations peak in winter, led by Scotland/Ireland, which consistently generate high volumes and strong positive sentiment.

DIGITAL CONVERSATION VOLUMES



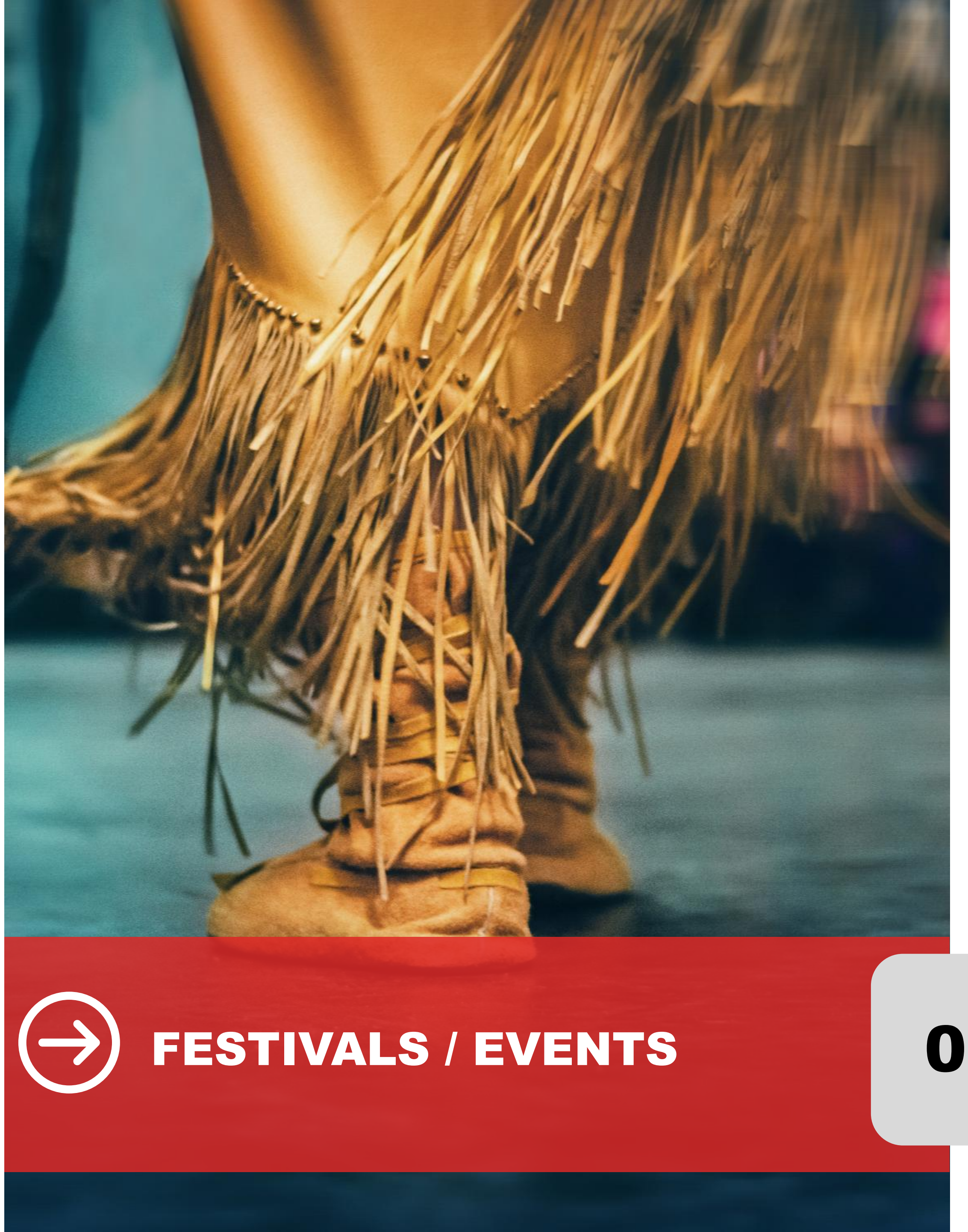
DIGITAL NET SENTIMENT



Meanwhile, Quebec drives steady conversation volumes across seasons but struggles with largely negative sentiment, signalling potential reputation challenges.

For Northern Ontario, the opportunity lies in **building a stronger cultural narrative and positioning itself as an authentic heritage destination to tap into this interest.**

Source: Digital Listening



FESTIVALS / EVENTS

02

Low appeal and weak associations.
Northern Ontario ranks lowest for festivals and events appeal, with challenges around unpredictable weather and weaker associations with unique themes or large-scale events. Japan and Eastern Europe lead the category.

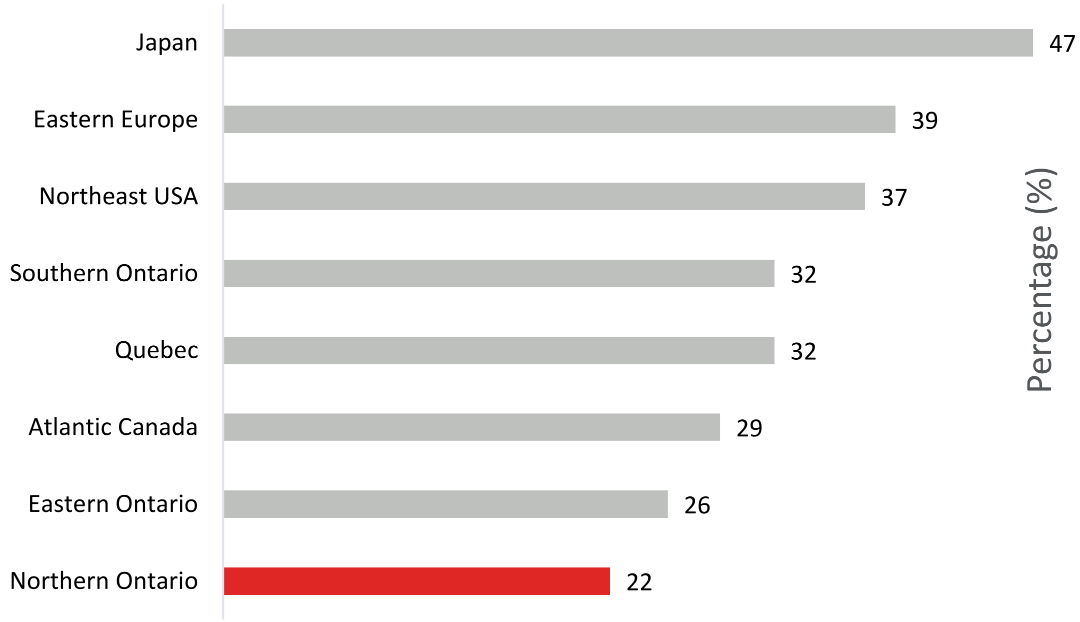
Summer is the peak season for event conversations.
Digital conversations spike in summer, driven almost entirely by Northeast USA, reflecting strong interest in their event offerings during this period. These conversations also carry consistently positive sentiment.

Opportunity to strengthen storytelling and visibility.
Northern Ontario has room to grow by elevating its event narrative and visibility in the summer, especially when travellers are actively planning. Targeted promotion could help compete for attention during this high-demand season.

Appeal and Association

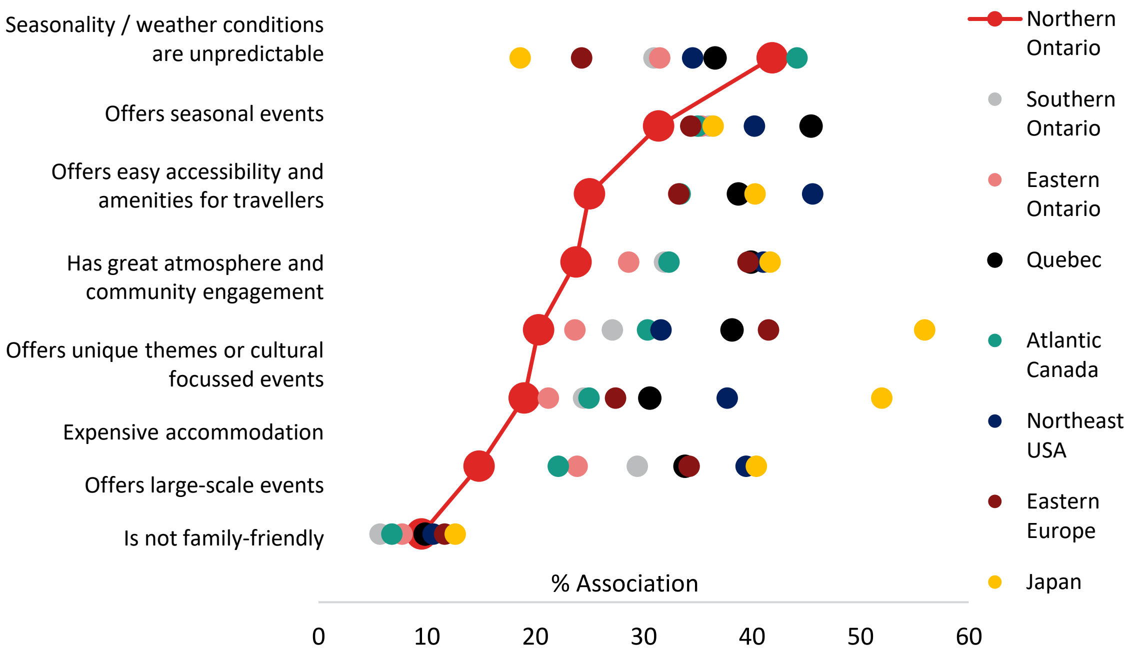
Northern Ontario has the lowest appeal for Festivals and Events, with Japan leading, as unpredictable weather and overall weaker associations hinder its competitiveness.

APPEAL



Q: When thinking about Festivals/Events when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

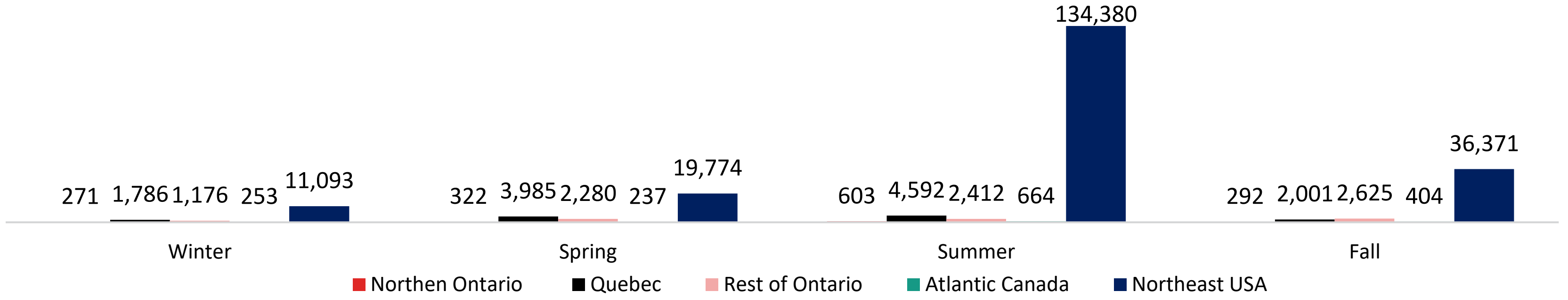


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Festivals and Events

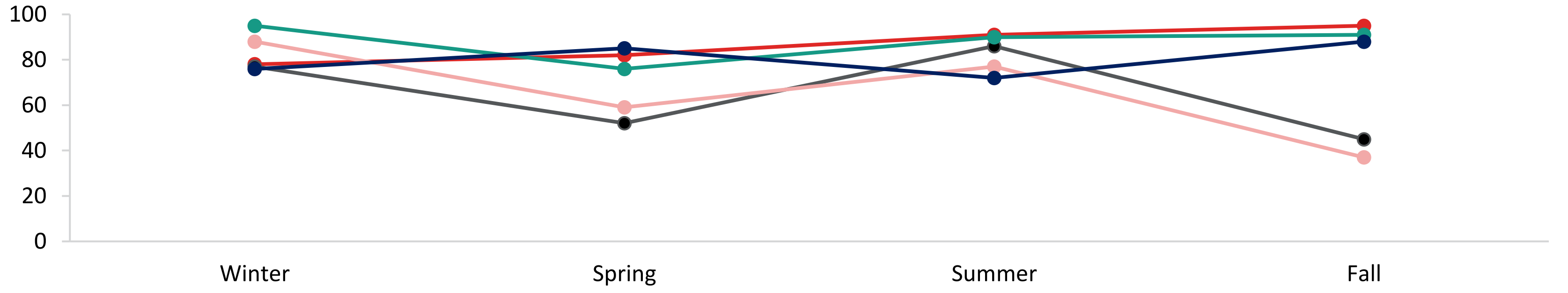
Conversation Trends

Northeast USA completely dominates conversation volumes about festivals and events, especially in the Summer. This is coupled with consistently positive sentiment.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



This is a reflection of strong interest in Northeast USA event offerings during this peak season.

This conversation is also paired with consistently positive sentiment, reinforcing the region's appeal as a vibrant events destination.

For Northern Ontario, this highlights an opportunity to elevate its event storytelling and promotion in summer to compete for attention when travellers are most engaged with festival planning and trip ideas.

Source: Digital Listening

INDIGENOUS TOURISM EXPERIENCES

03

Northern Ontario ranks lowest for Indigenous tourism.
Northern Ontario is not known for and not associated with Indigenous tourism attributes while Australia and New Zealand lead.

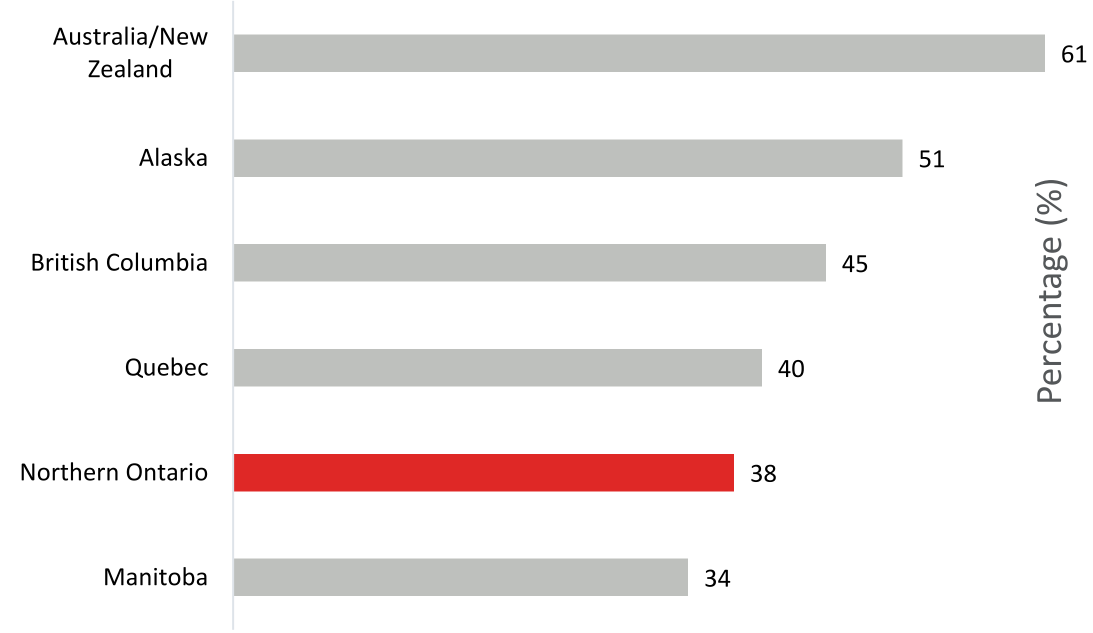
Australia & New Zealand drive the most conversation, although negative.
The overall sentiment is largely negative, suggesting ongoing challenges and perceptions around how these regions handle Indigenous tourism topics.

Opportunity to differentiate through positive sentiment.
Northern Ontario has the potential to stand out by promoting positive narratives and experiences, highlighting its unique and respectful Indigenous tourism offerings.

Appeal and Association

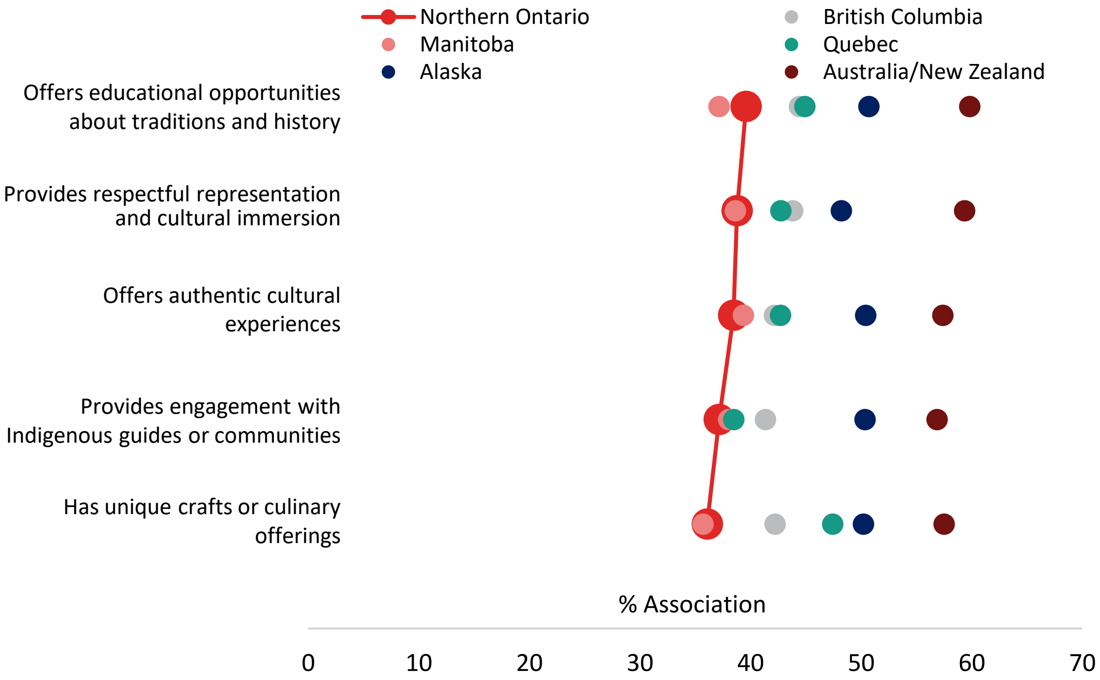
Northern Ontario is not seen as appealing and rank lowest for Indigenous tourism attributes, with Australia/New Zealand being a clear leader in this market.

APPEAL



Q: When thinking about Indigenous Tourism Experiences when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

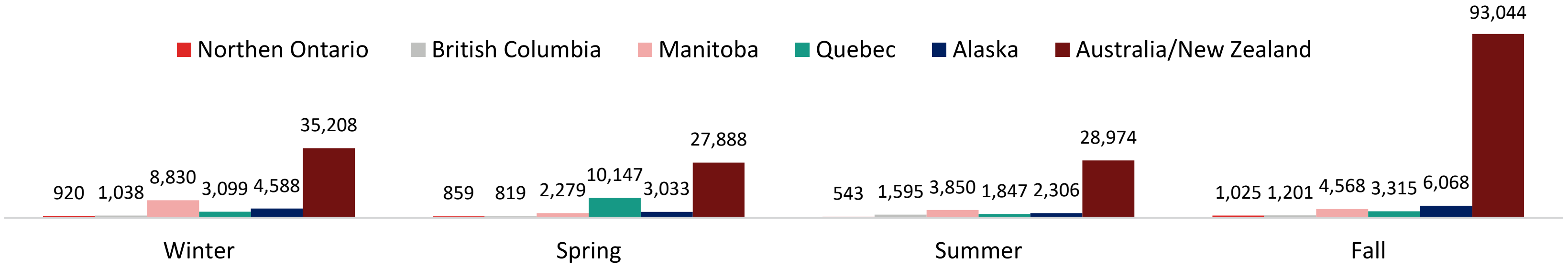


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Indigenous Tourism

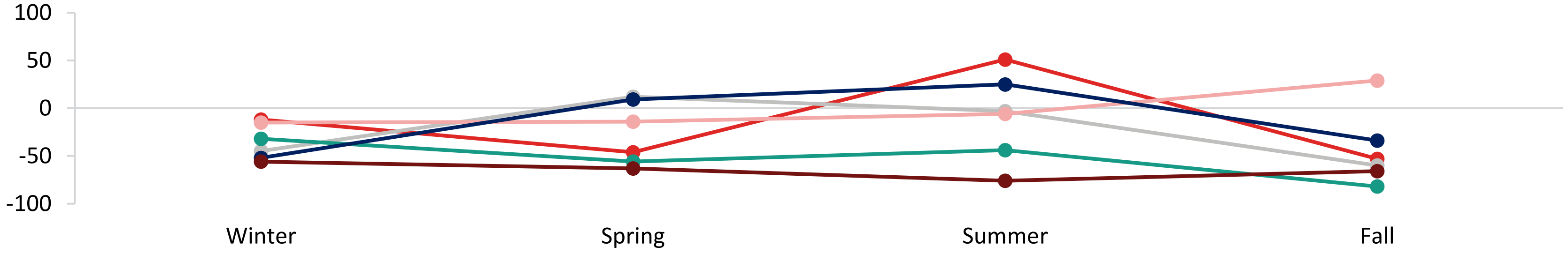
Conversation Trends

Australia and New Zealand drive the most discussion on Indigenous tourism, mostly negative, while Northern Ontario sees the highest positive sentiment in summer.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT

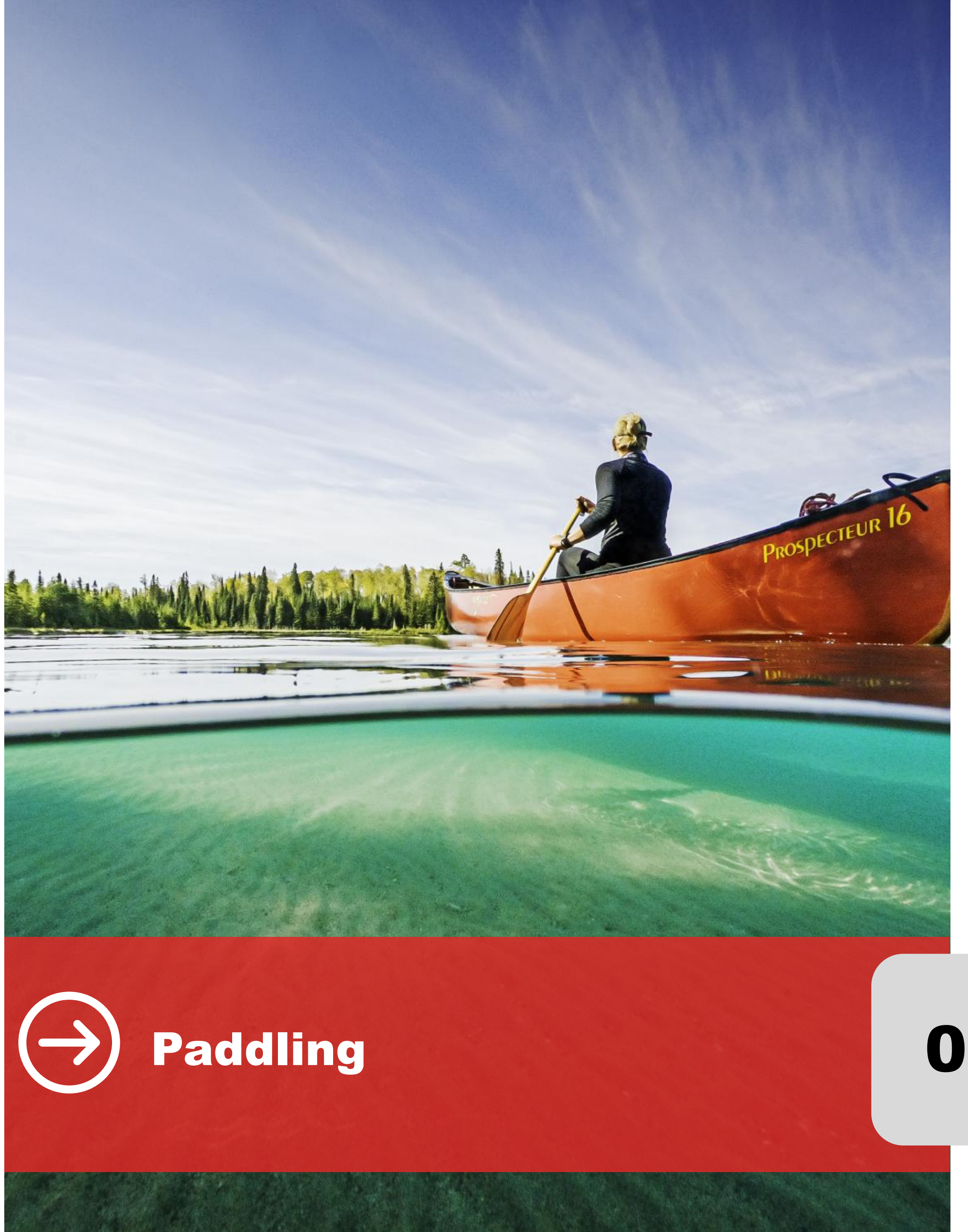


For Northern Ontario, the key insight is the opportunity to differentiate through positivity.

Although it drives lower conversation volumes, Northern Ontario stands out for achieving the highest positive sentiment in summer.

This signals a **potential strength in authentic Indigenous tourism experiences** that resonate well with audiences and could be a foundation for targeted marketing and supporting storytelling.

Source: Digital Listening



Paddling

04

Northern Ontario outperforms local competitors Quebec and Manitoba.

Northern Ontario stands out as a more appealing Paddling destination compared to its local counterparts, Quebec and Manitoba.

Northern Ontario offers diverse experiences and tranquil waters.

The region does well in providing a variety of paddling experiences, especially for those seeking serene, undisturbed environments setting it apart from others.

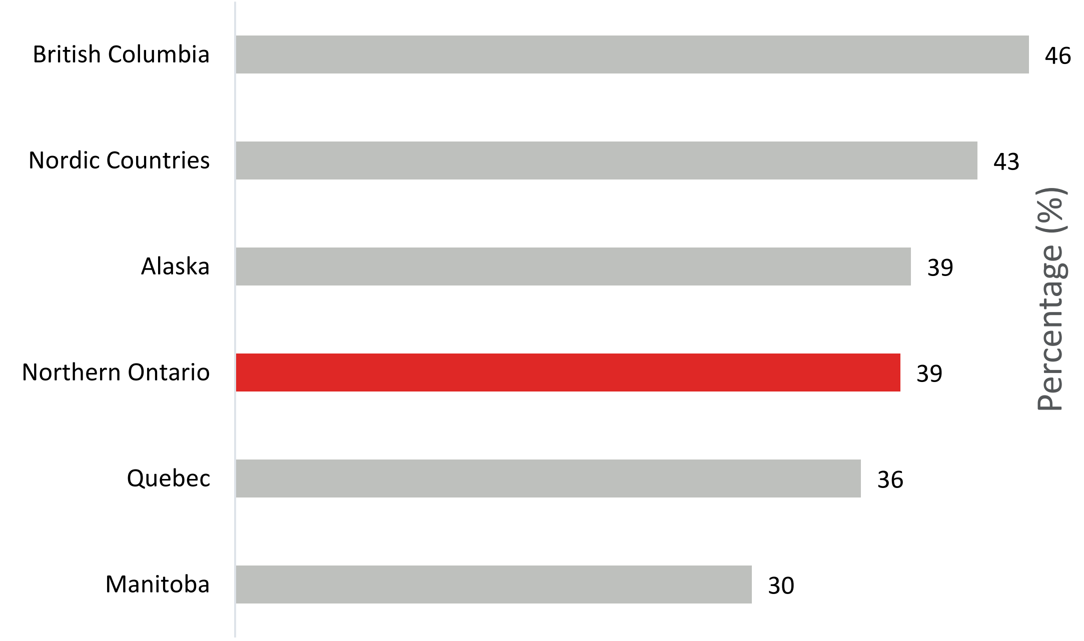
Northern Ontario can leverage winter paddling presence.

While Nordic countries lead in online conversation, Northern Ontario contributes fairly to winter paddling discussions, highlighting an opportunity to promote paddling during the winter months when conversation is high.

Appeal and Associations

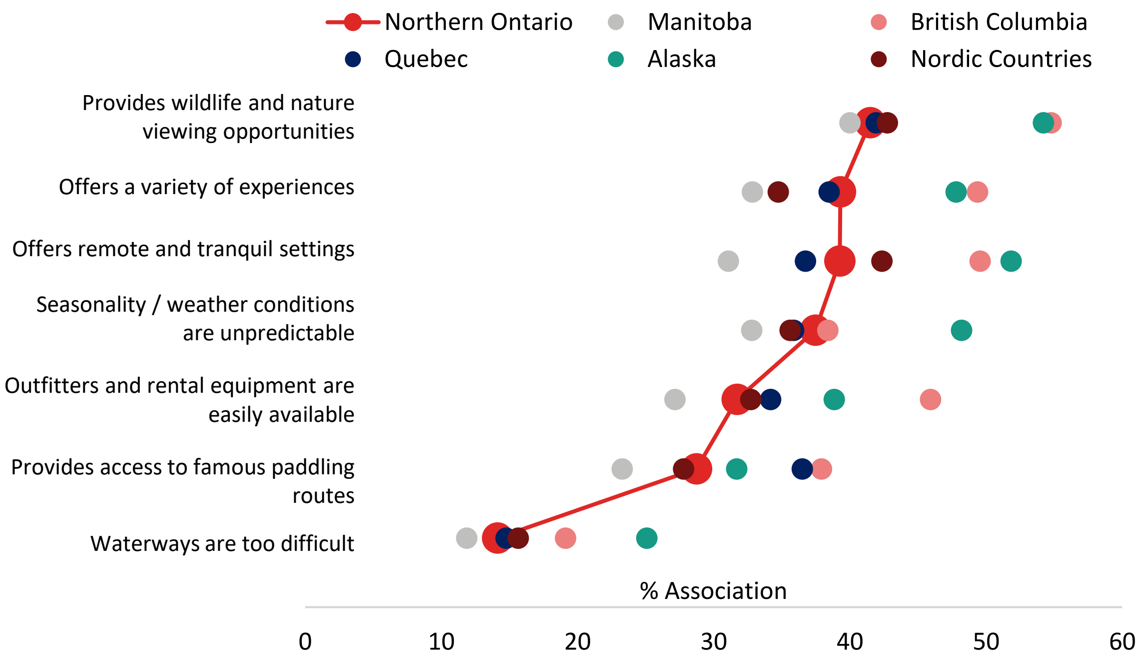
Northern Ontario has moderate appeal for paddling, offering diverse experiences and tranquil, navigable waterways, outperforming Quebec and Manitoba.

APPEAL



Q: When thinking about Kayaking when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS



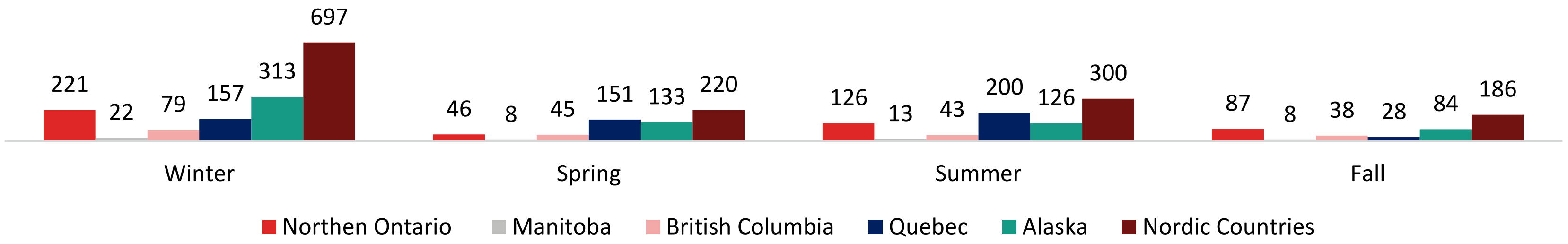
Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Kayaking / Paddling

Skift ADVISORY

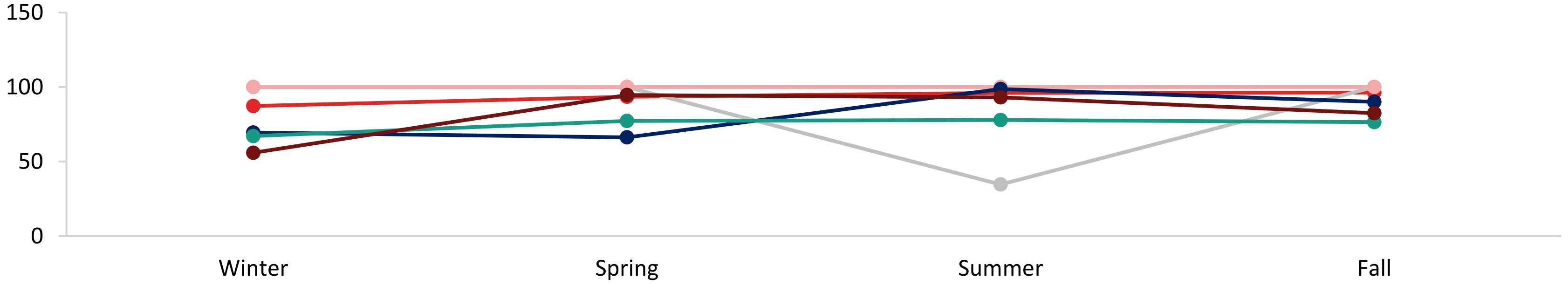
Conversation Trends

Paddling conversation volumes are highest for Nordic Countries, Alaska, and Quebec. Northern Ontario contributes a fair amount to Winter volumes as well.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



However, Northern Ontario also contributes a notable share of winter conversations, indicating some level of engagement and interest in the region.

For Northern Ontario, the key takeaway is the opportunity to leverage its winter paddling presence and build on its reputation. While other regions dominate volume, maintaining strong sentiment and increasing visibility in peak discussion periods could help establish Northern Ontario as a compelling paddling destination.

Source: Digital Listening

FRANCOPHONE TOURISM EXPERIENCES

05

Northern Ontario carries the least appeal for francophone experiences.
The region is not viewed as a primary destination for francophone cultural activities, unlike Quebec, which has a stronger cultural connection to French language.

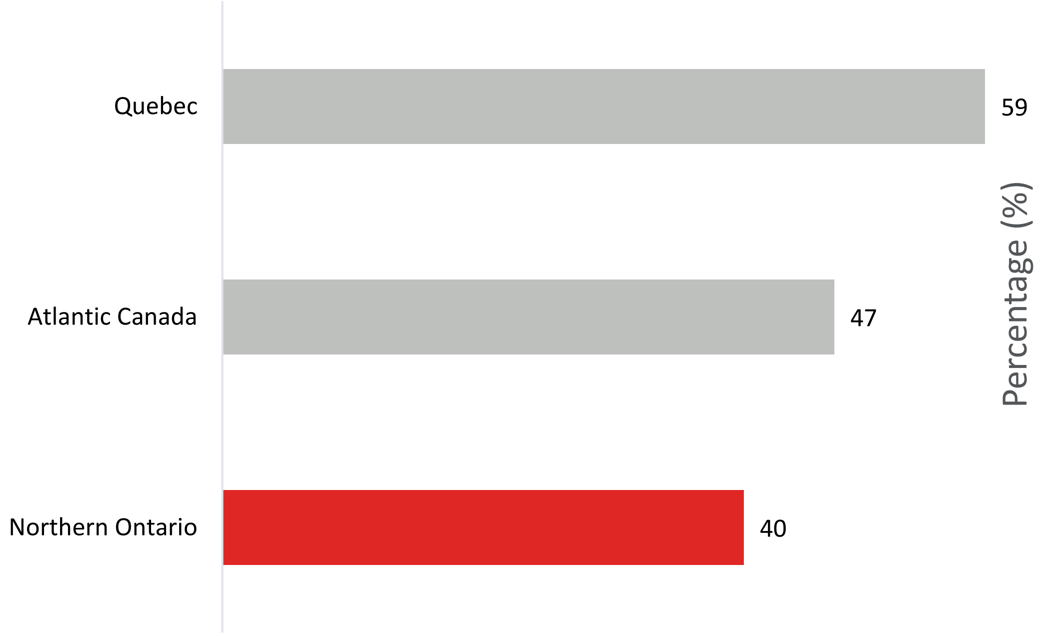
The regions francophone experiences garner positive conversation.
While Northern Ontario’s francophone offerings may not be as well-known, those who do engage with the region's cultural experiences tend to express positive sentiment.

Quebec’s net-negative sentiment is an opportunity for Northern Ontario.
While Quebec faces a net-negative sentiment regarding its francophone experiences, Northern Ontario could seize this opportunity by positioning itself as an appealing alternative.

Appeal and Associations

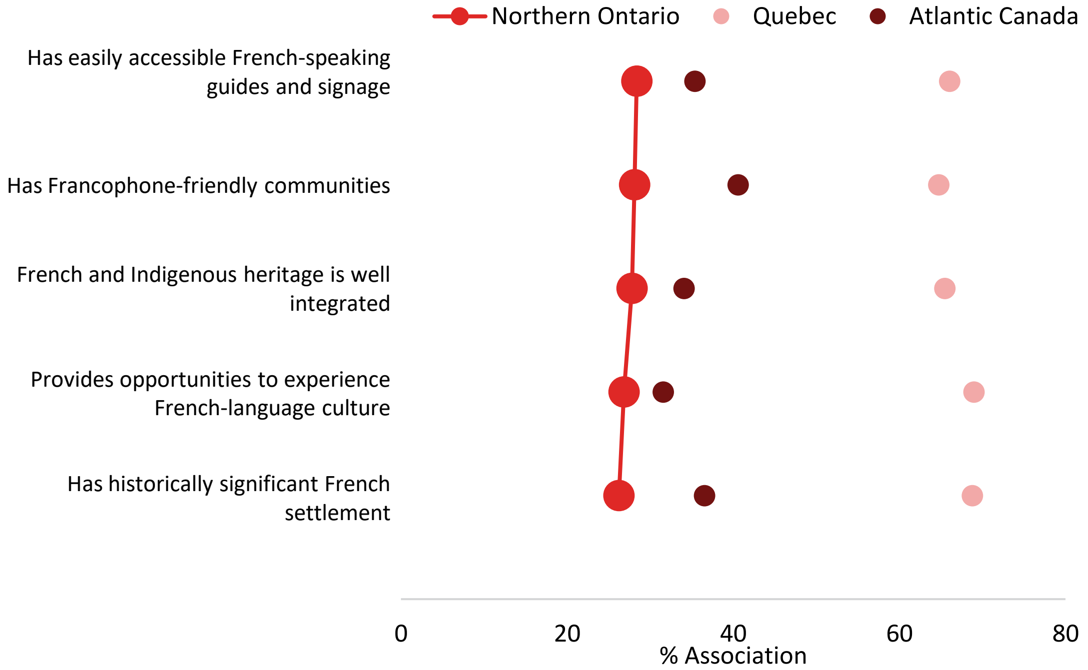
Northern Ontario carries less appeal for francophone experiences than Quebec or Atlantic Canada and ranks the lowest in Francophone tourism attributes.

APPEAL



Q: When thinking about Francophone Tourism Experiences when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

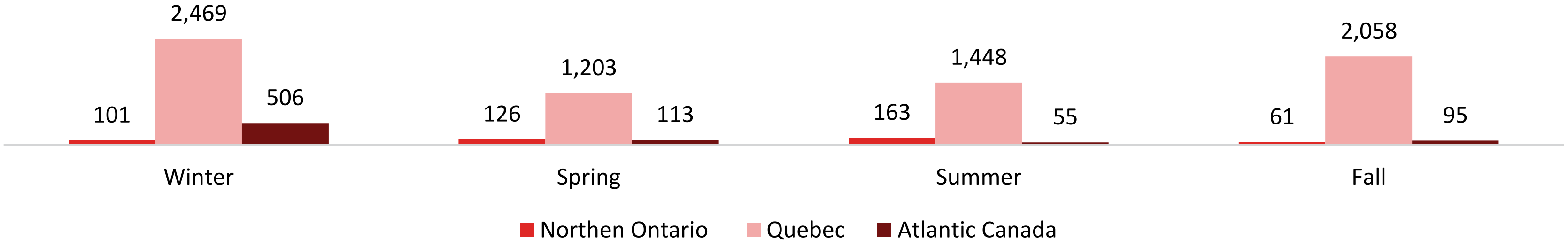


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Francophone Tourism

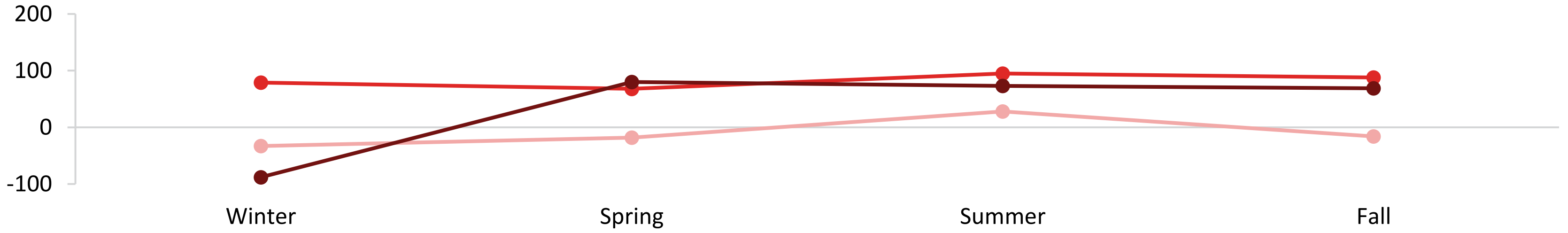
Conversation Trends

Northern Ontario’s Francophone experiences generate positive sentiment, with higher conversation volumes in Winter and Fall.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



However, Quebec dominates the conversation volume despite facing net-negative sentiment throughout.

For Northern Ontario, there’s an opportunity to leverage its positive reputation to attract Francophone travellers, especially by **amplifying visibility during high-interest seasons when Quebec’s negative sentiment could make travellers consider alternative destinations.**

Source: Digital Listening

06

Great Lakes States outperform when it comes to boating appeal.

Great Lakes States, such as Michigan, Wisconsin, and Ohio, are considered more established boating destinations and therefore more appealing.

Opportunity to dial up water safety assurances.

For boaters, safety is paramount, and Northern Ontario could leverage this need by emphasizing water safety in its marketing efforts and relieve weather fears.

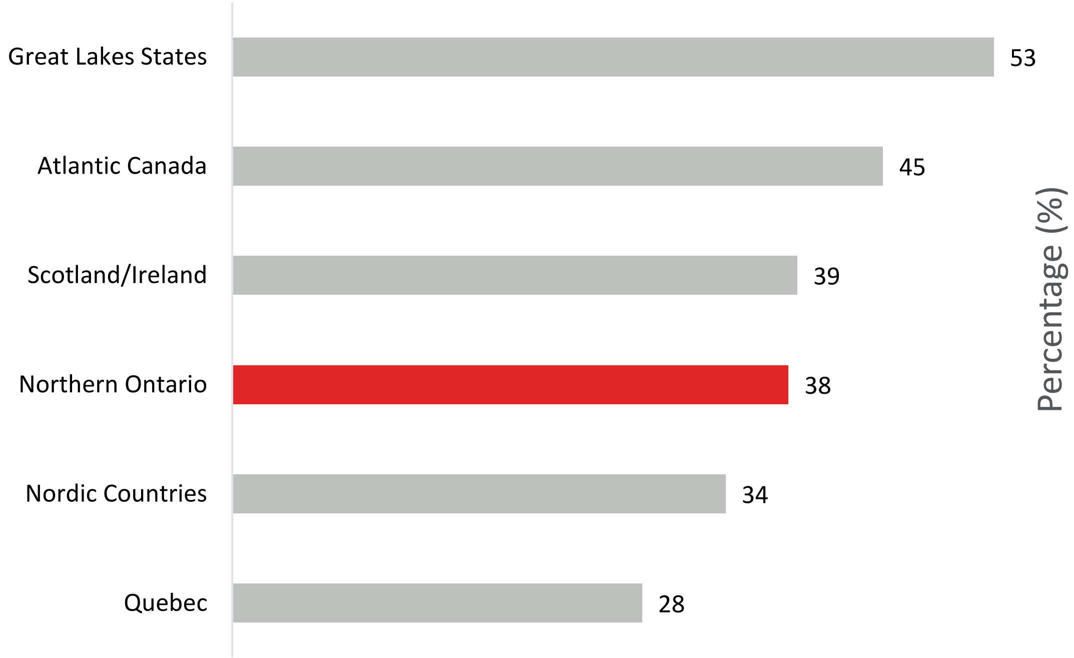
Northern Ontario generates modest conversation volumes.

Although Northern Ontario holds natural appeal for boating with its serene and less-crowded waters, it generates only modest conversation volumes online compared to Nordic countries.

Appeal and Associations

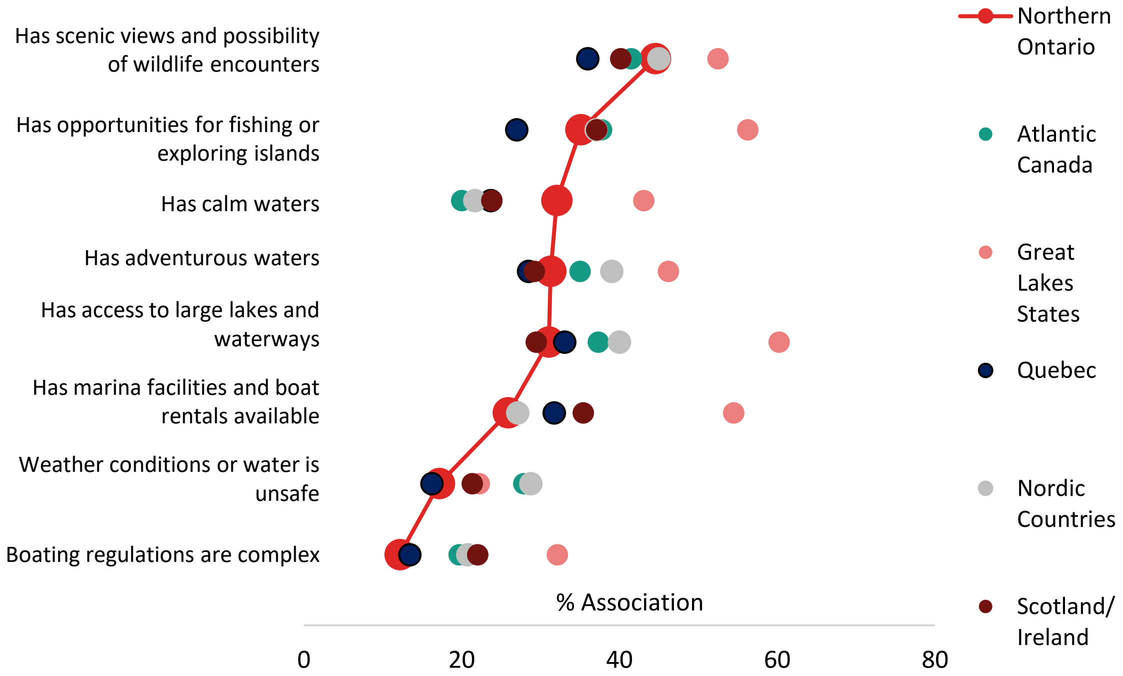
Northern Ontario holds more appeal for boating than Nordic Countries and Quebec, offering scenic views, calm waters, and straightforward regulations.

APPEAL



Q: When thinking about Boating when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

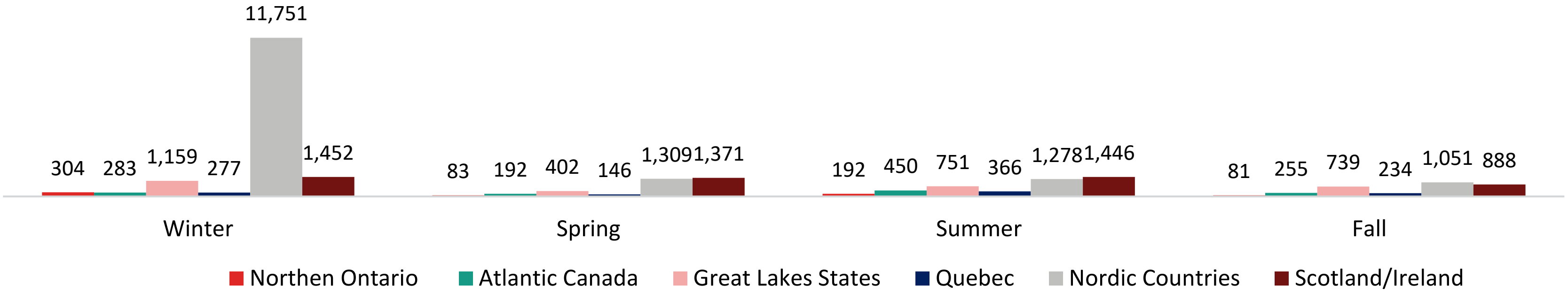


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Boating

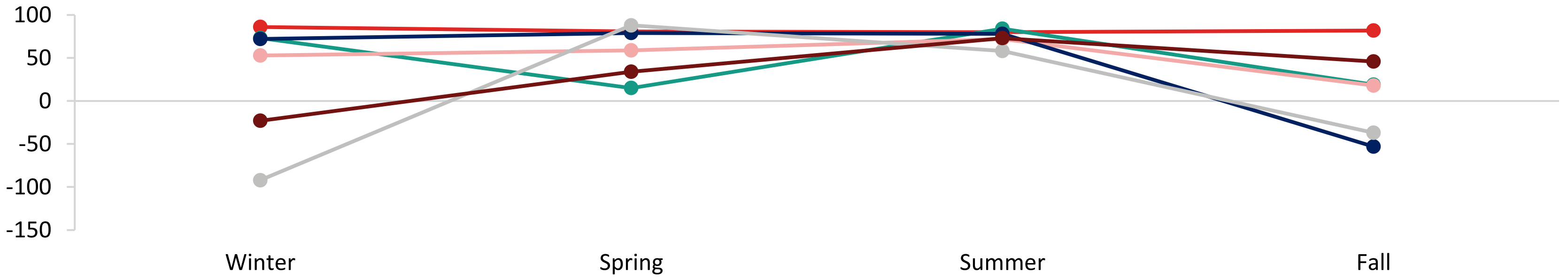
Conversation Trends

The Nordic countries create significant conversation volumes on Boating especially in the Winter, followed by Scotland/Ireland who generate consistent volumes throughout the year.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



Northern Ontario generates modest conversation levels but shows a positive net sentiment compared to some competitors.

For Northern Ontario, the opportunity is to strengthen its boating profile, especially during winter when conversations are high. By leveraging its positive sentiment, Northern Ontario can position itself as a scenic and enjoyable boating destination during seasonal peaks.

Source: Digital Listening

ANGLING/ FISHING

07

Northern Ontario stands out for its remote and pristine lakes.

The region offers tranquil, remote unspoiled lakes that attract anglers and is noticed by travellers for these attributes.

Great Lakes States and Alaska are the most appealing for angling.

The great lakes states are most appealing due to their abundant fishing infrastructure and accessible fishing locations with a large variety of species.

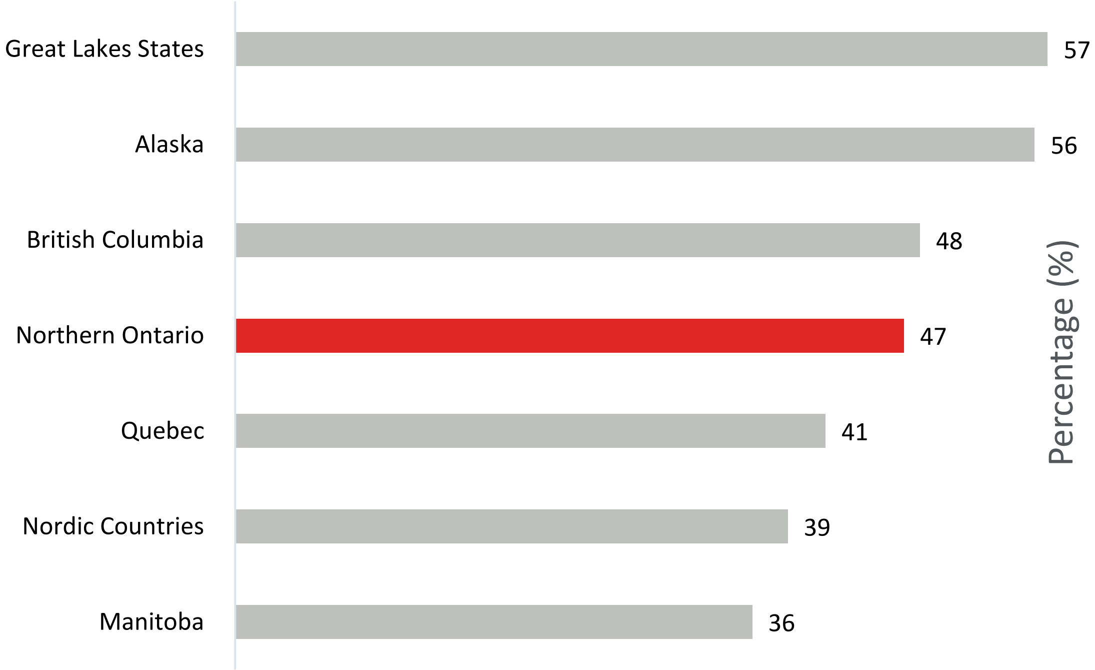
Northern Ontario garners positive sentiment in winter for angling

Northern Ontario is a prime destination for unique cold-weather fishing experiences. This creates an opportunity to promote their ice fishing products.

Appeal and Associations

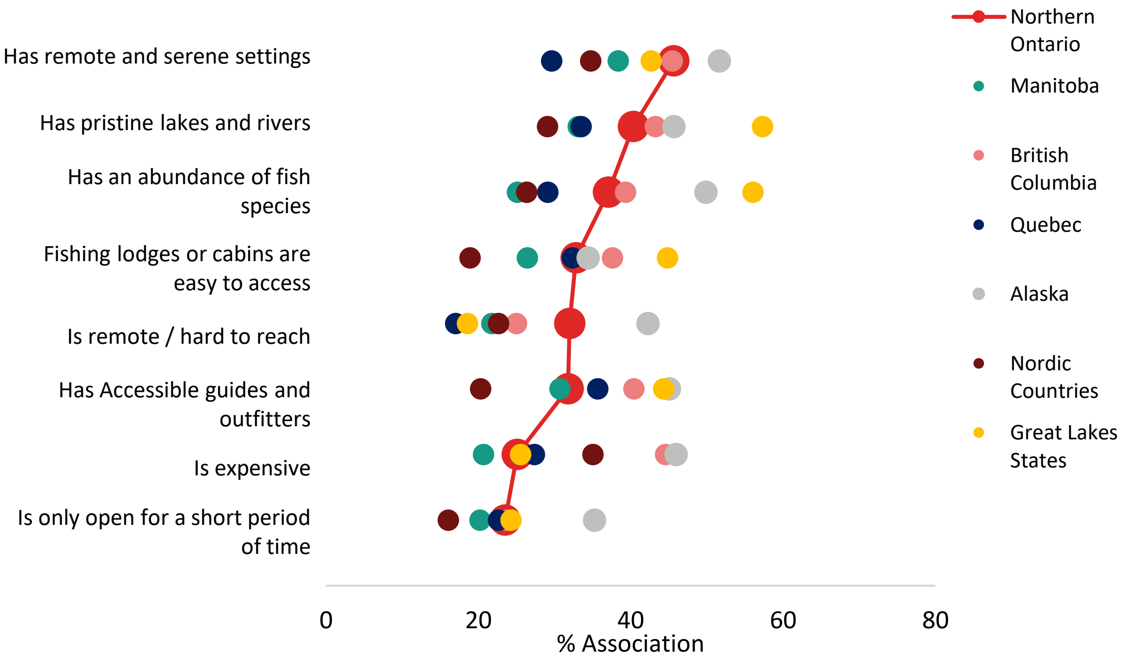
Northern Ontario has average appeal for angling, excelling in remote, pristine lakes and rivers but outperformed on appeal by the Great Lakes States, Alaska, and British Columbia.

APPEAL



Q: When thinking about Angling/Fishing when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS



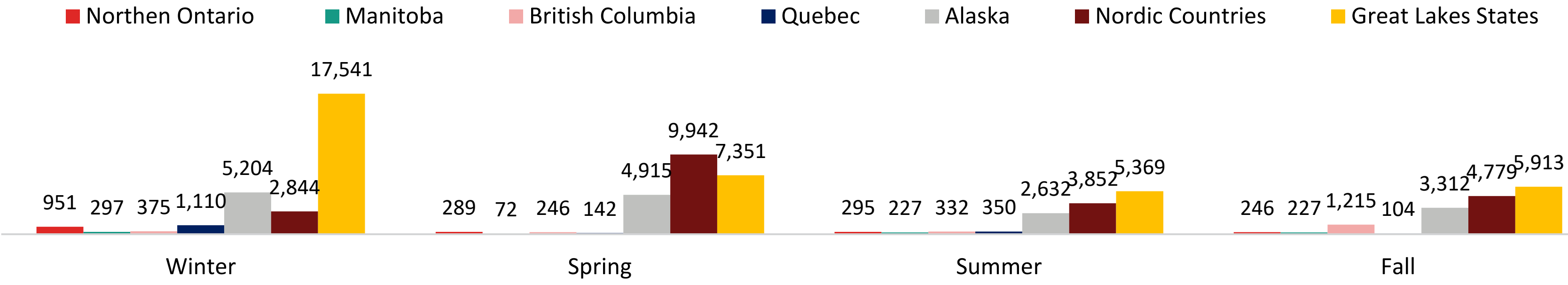
Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Angling / Fishing

Skift ADVISORY

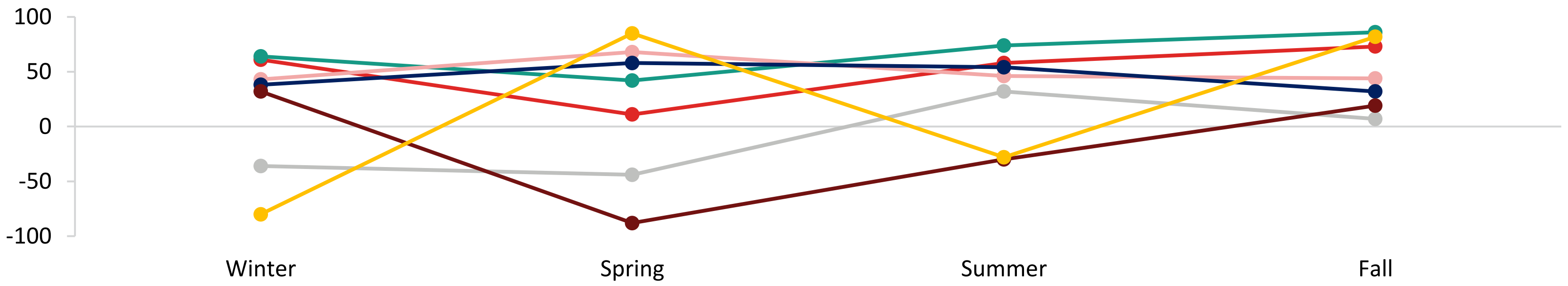
Conversation Trends

Northern Ontario's conversations peak in Winter, with generally positive sentiment.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



Angling conversations peak in Winter, led by the Great Lakes States, with strong volumes continuing into Spring due to the Nordic Countries.

For Northern Ontario, the key takeaway is the opportunity to **capitalize on winter interest in angling by enhancing marketing during peak conversation periods.** The generally positive net sentiment suggests a solid foundation to promote the region as a great winter angling destination.

Source: Digital Listening

CAMPING / HIKING

08

Northern Ontario has low camping/hiking appeal.

Despite abundant natural beauty, Northern Ontario struggles to compete with other well-established destinations for camping and hiking.

Northern Ontario excels in wildlife viewing and scenic sites.

Northern Ontario excels in wildlife viewing and scenic outdoor experiences, with its vast wilderness offering abundant opportunities to observe diverse wildlife.

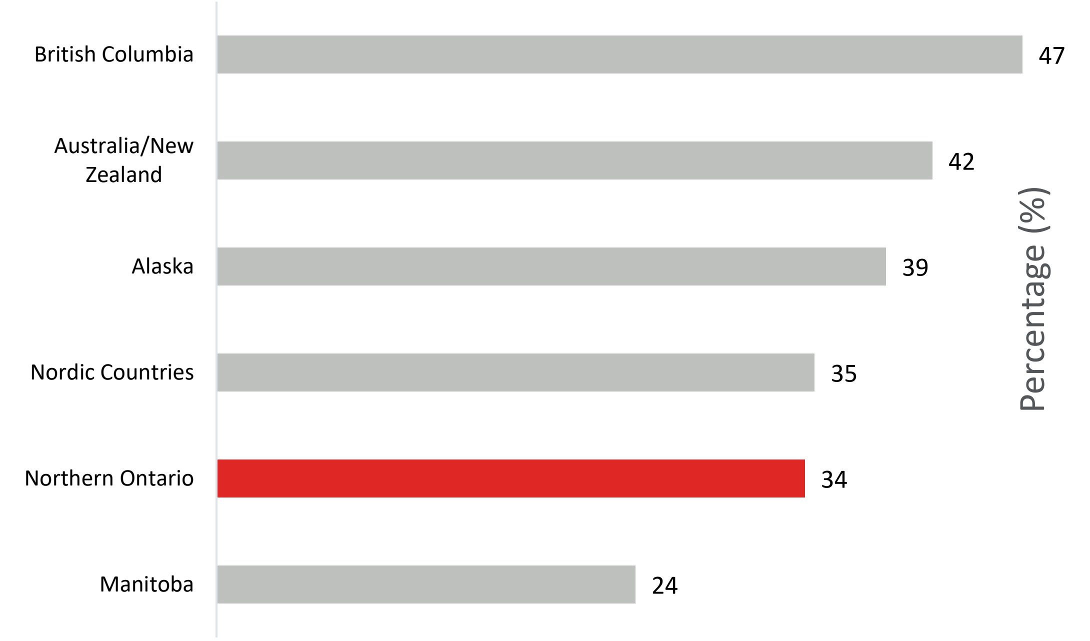
Opportunity for Northern Ontario to build their hiking/camping offer.

Northern Ontario may not be a top destination for hiking or camping currently, but the region has significant potential to grow its offerings in these areas, build visibility and drive conversation.

Appeal and Associations

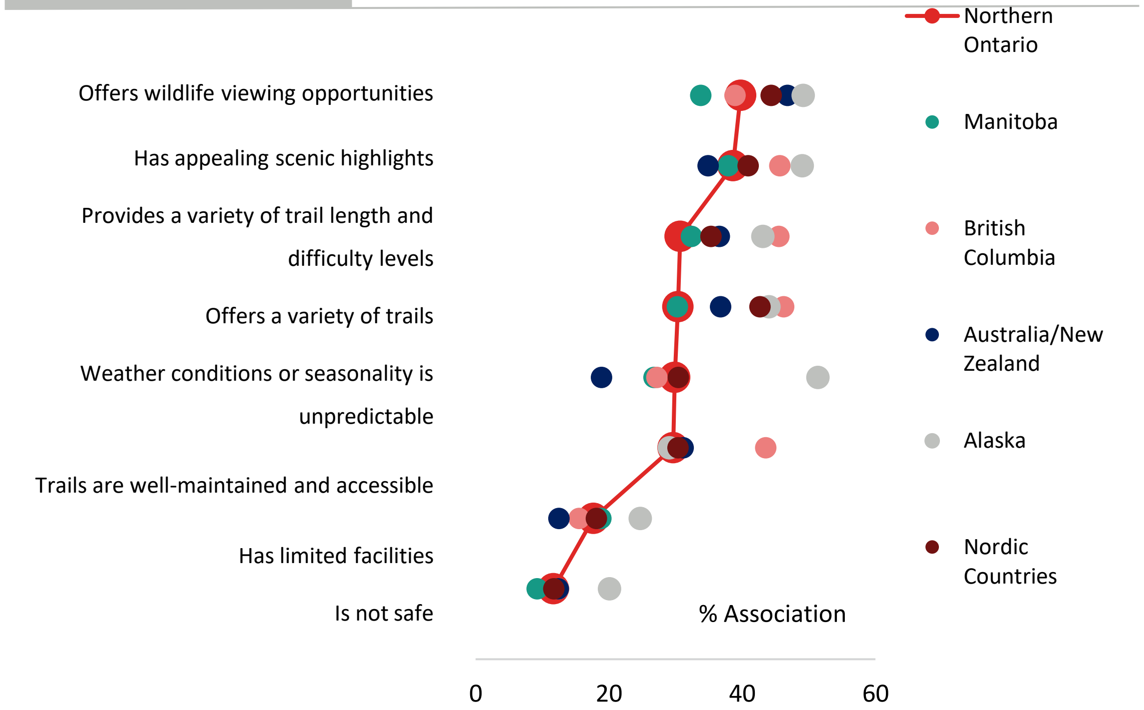
Northern Ontario is not a primary destination for camping or hiking, but it excels in wildlife viewing and scenic highlights.

APPEAL



Q: When thinking about Camping/Hiking when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

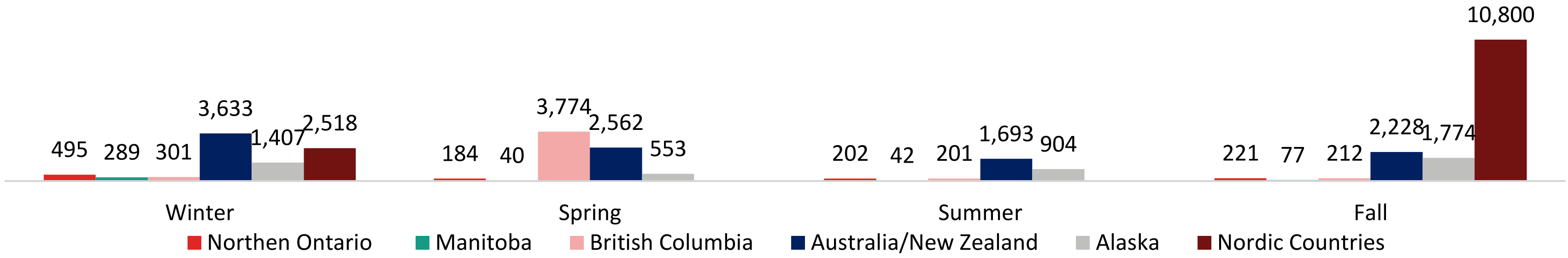


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Camping / Hiking

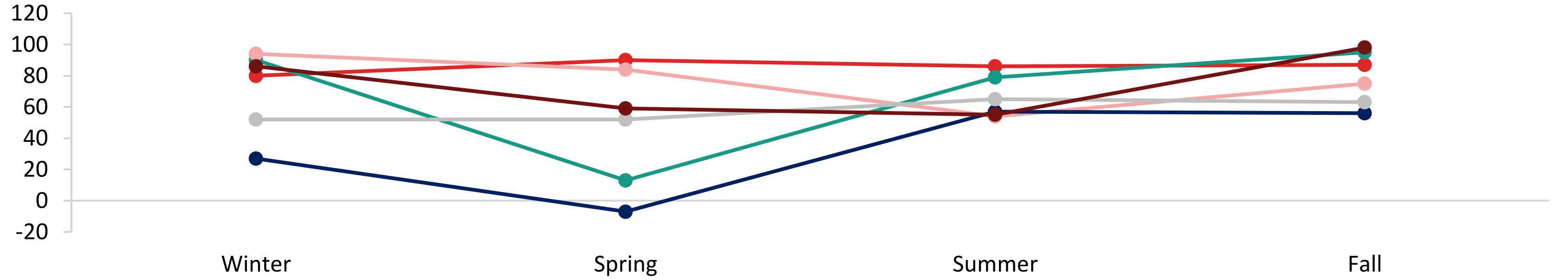
Conversation Trends

Camping and hiking conversation volumes are driven by Australia, New Zealand, Alaska, and Nordic Countries, with consistent volumes year-round, except for a Fall spike in the Nordic Countries.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



For Northern Ontario, this signals an opportunity to build visibility for hiking and camping by tapping into seasonal trends, especially in Fall, while maintaining a strong positive sentiment.

This positioning could help attract outdoor adventurers during peak conversation periods.

Source: Digital Listening

ATV-ING/ QUAD BIKING

09

Northern Ontario lags in overall appeal.

Northern Ontario ranks lowest in quad biking appeal, performing well only on trail variety but falling behind on key experience factors like scenery, accessibility, and amenities.

Australia/New Zealand dominate online conversations.

Quad biking conversations are driven by Australia/New Zealand, especially in Spring and Fall, while Northern Ontario sees limited online engagement-indicating missed opportunities to capture attention.

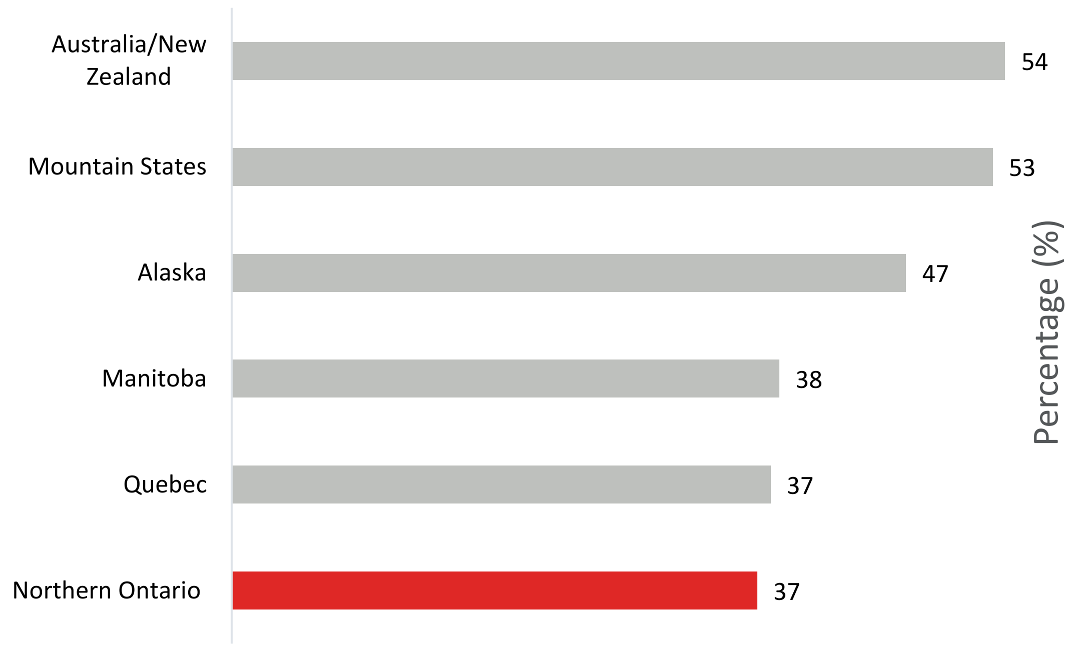
Negative sentiment a concern for competitors.

Mountain States generate strong conversation volumes but struggle with negative sentiment, suggesting Northern Ontario could differentiate by promoting positive experiences and safety.

Appeal and Associations

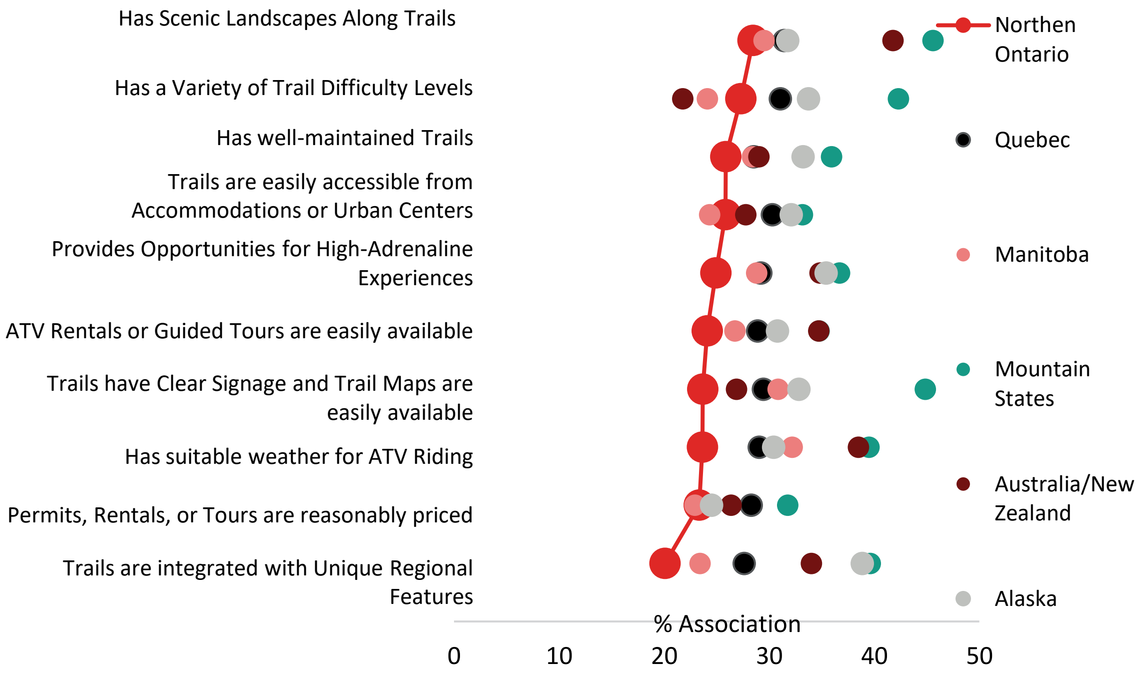
Northern Ontario is the least appealing quad biking destination, excelling in trail variety over Australia, New Zealand, and Manitoba but lagging in other key experience factors.

APPEAL



Q: When thinking about ATV-ing/Quad Biking when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

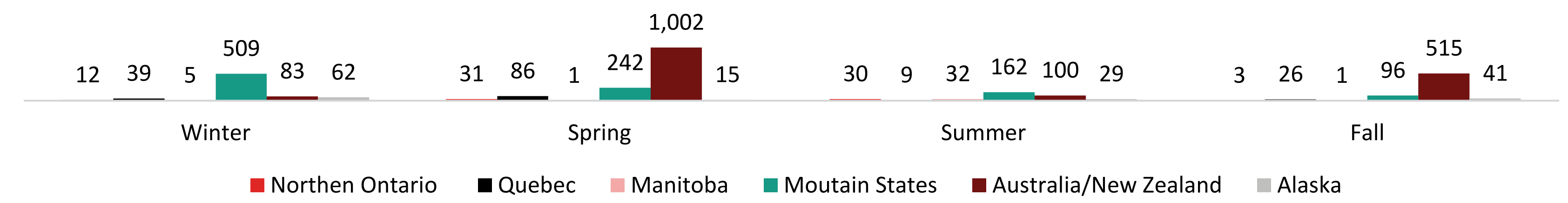


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Quad Biking

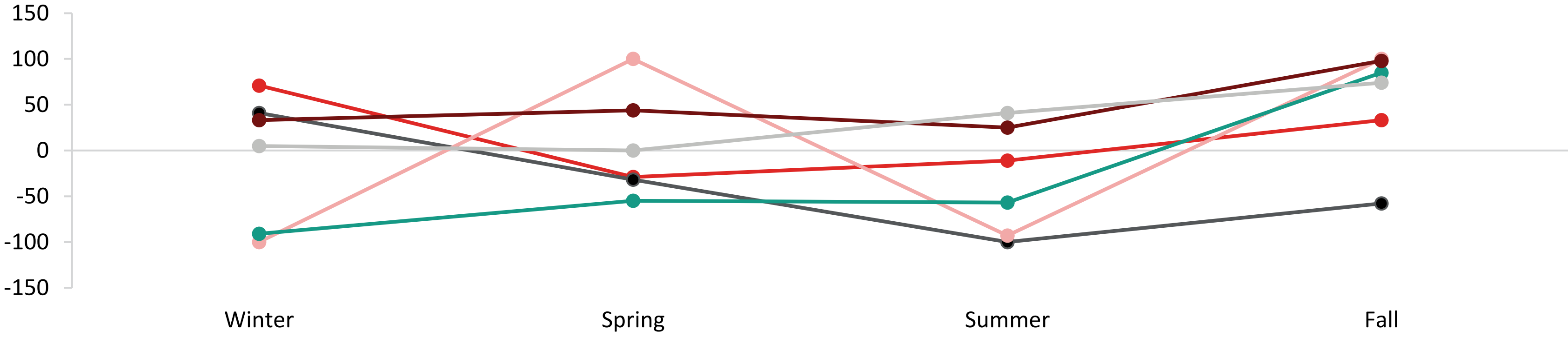
Conversation Trends

Australia/New Zealand dominates quad biking digital conversations, especially during spring and fall-making these their key seasons for engagement.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



The Mountain States follow but tend to generate more negative sentiment, signalling potential issues with the visitor experience.

For Northern Ontario, the takeaway is the **need to build visibility and positive engagement online, particularly during spring and fall when conversations spike.** Positioning Northern Ontario as a safe, scenic, and well-managed alternative can help attract interest while competitors face sentiment challenges.

Source: Digital Listening

CYCLING

10

Cycling appeal driven by scenic trails but gaps remain.

Northern Ontario ranks low in cycling appeal, with strength in scenic bike trails but lagging in infrastructure, signage, and nature proximity.

Summer is the peak for cycling conversations.

Cycling digital conversations surge in summer, led by the Pacific Northwest, though this comes with negative sentiment. Quebec and the Nordic Countries also see seasonal spikes earlier in spring.

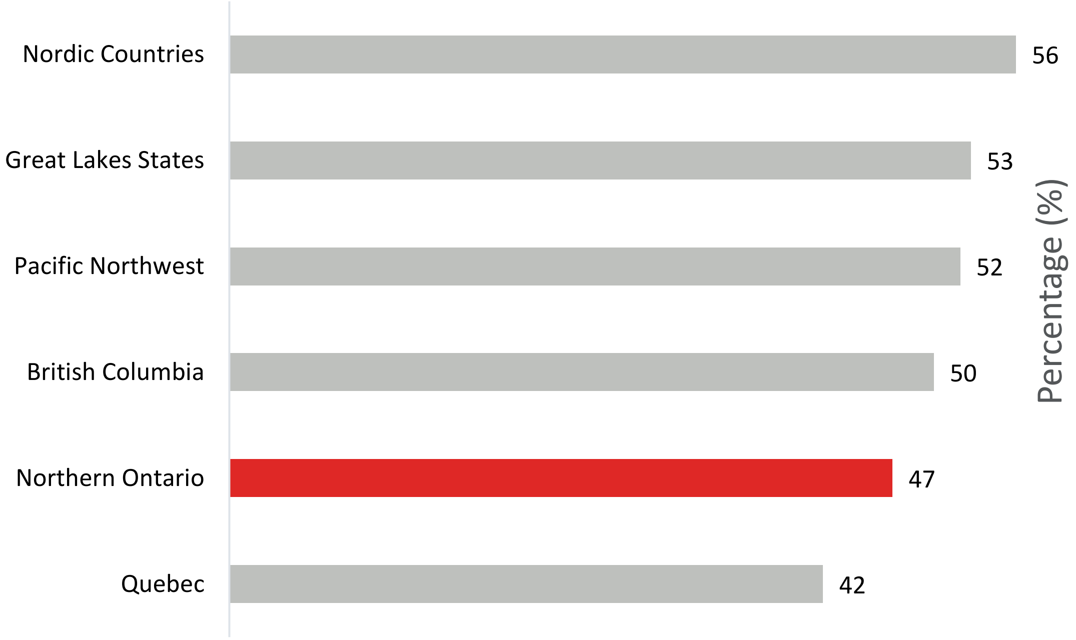
Opportunity to boost awareness and positive experiences.

For Northern Ontario, the opportunity lies in building visibility during spring and summer and prioritizing positive visitor experiences to stand apart from competitors facing sentiment challenges.

Appeal and Associations

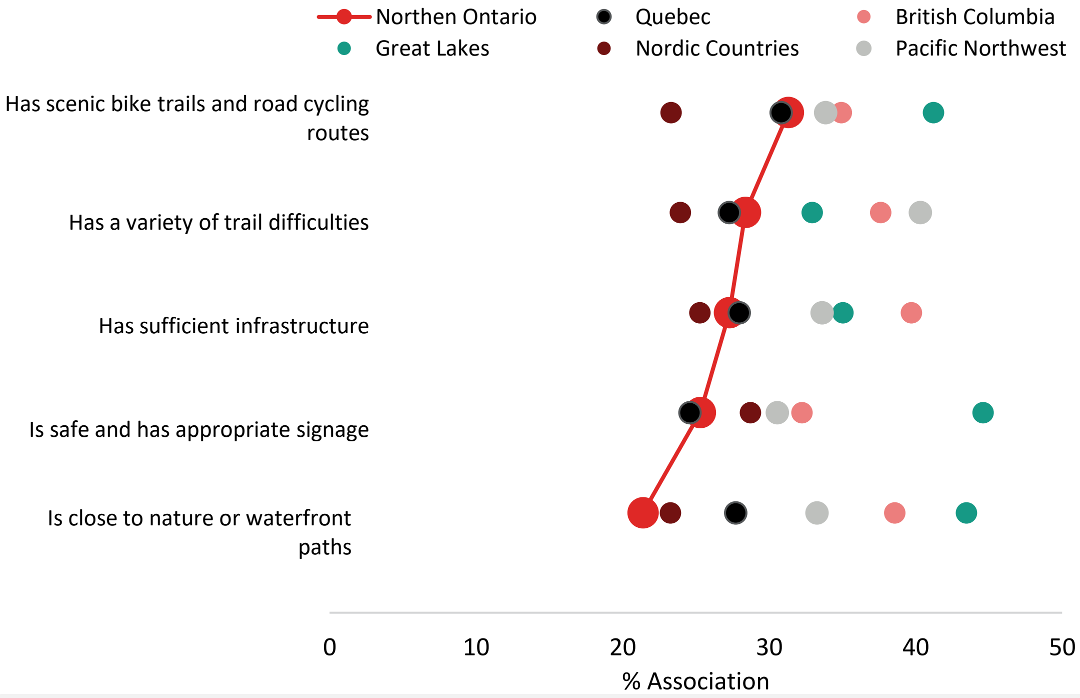
Northern Ontario ranks low in cycling appeal, only surpassing Quebec, with scenic bike trails as its strength but shortcomings in nature proximity, safety, and signage, while the Great Lakes States lead in cycling attributes.

APPEAL



Q: When thinking about Cycling when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

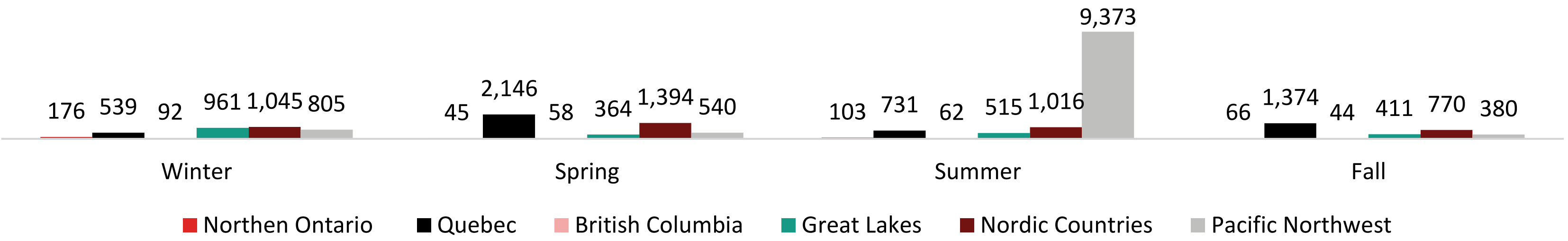


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Cycling

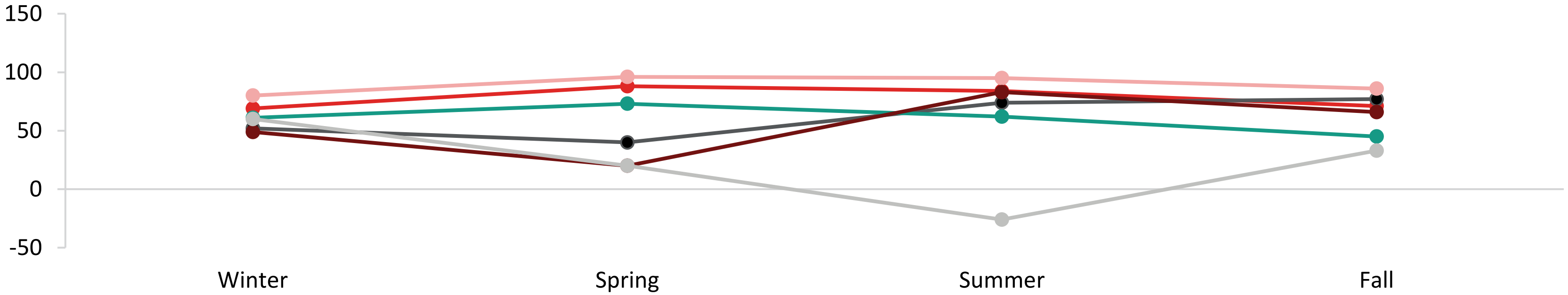
Conversation Trends

Summer is the peak season for cycling conversations, driven heavily by the Pacific Northwest, which dominates digital activity but faces negative sentiment during this period.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



Meanwhile, Quebec and the Nordic Countries see a conversation spike in spring, signalling growing interest in these destinations earlier in the season.

For Northern Ontario, the **key opportunity is to build awareness leading into spring and summer, while focusing on positive traveller experiences** to avoid the sentiment challenges seen in competitor markets like the Pacific Northwest.

Source: Digital Listening

SNOWMOBILING

11

Strong appeal driven by unique offerings.

Northern Ontario ranks 3rd in snowmobiling appeal, standing out for scenic routes, affordable rentals, and easy access to trails-making it competitive with top destinations like Alaska and the Great Lakes.

Winter is the key marketing window.

Digital conversations about snowmobiling peak sharply in winter, confirming it as the prime season for promotion. Tourism operators could prioritize winter campaigns when travellers are actively planning trips.

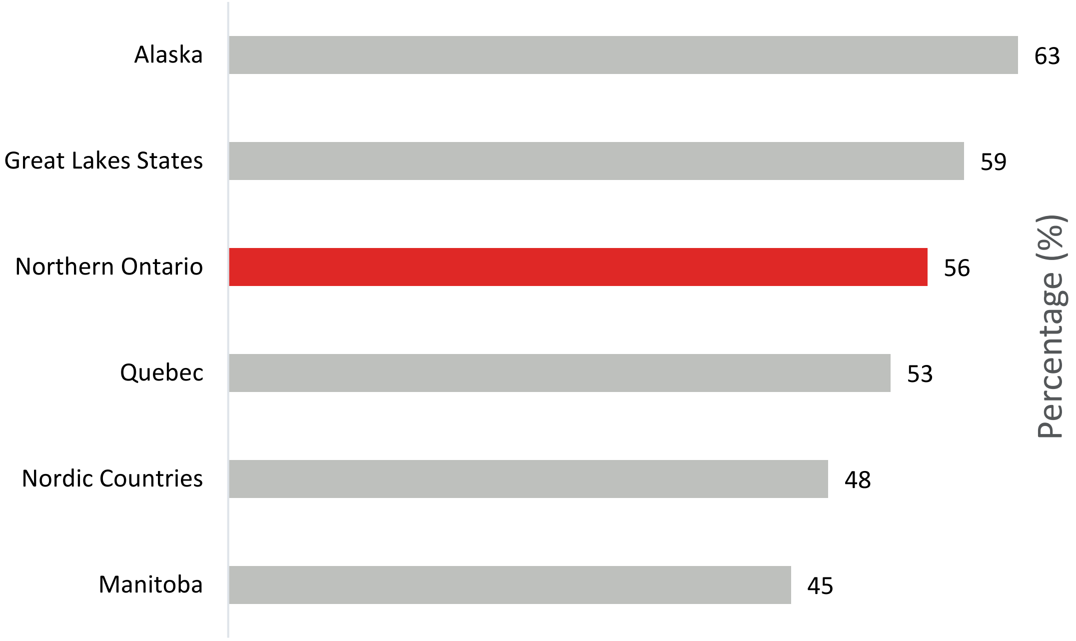
Opportunity to boost awareness and preference.

Despite strong associations with great trails and rentals, Northern Ontario generates lower digital conversation volumes than competitors. Increasing online visibility can help capture more interest during the high-demand season.

Appeal and Associations

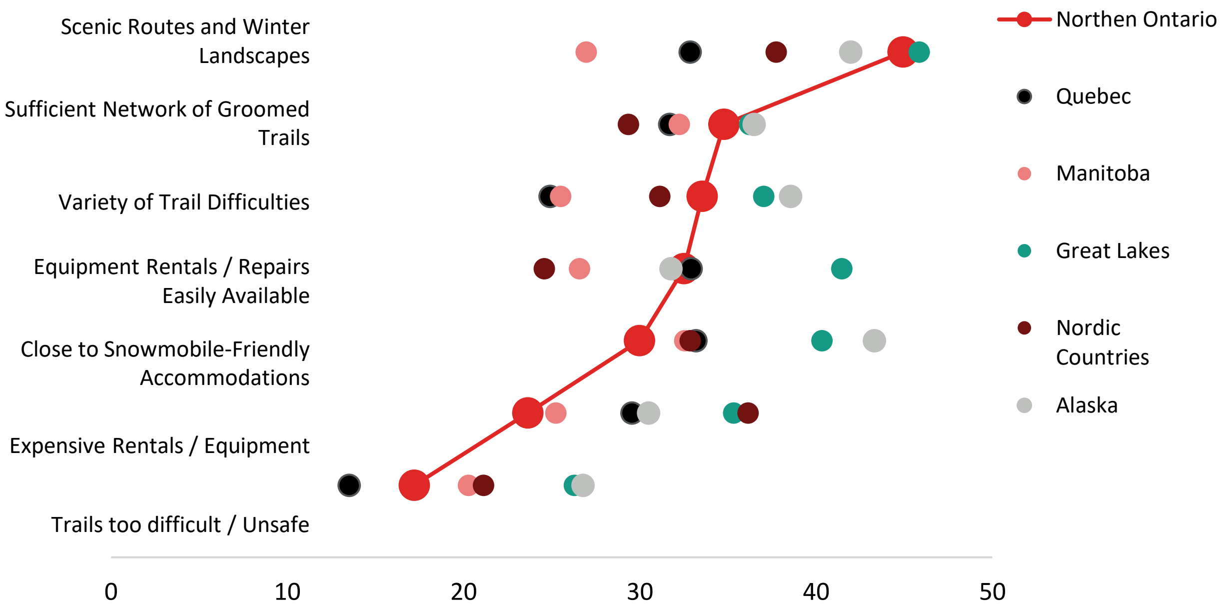
Northern Ontario ranks third in snowmobiling appeal, behind Alaska and the Great Lakes States, and stands out for its affordable rentals, scenic routes, and winter landscape.

APPEAL



Q: When thinking about Snowmobiling when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

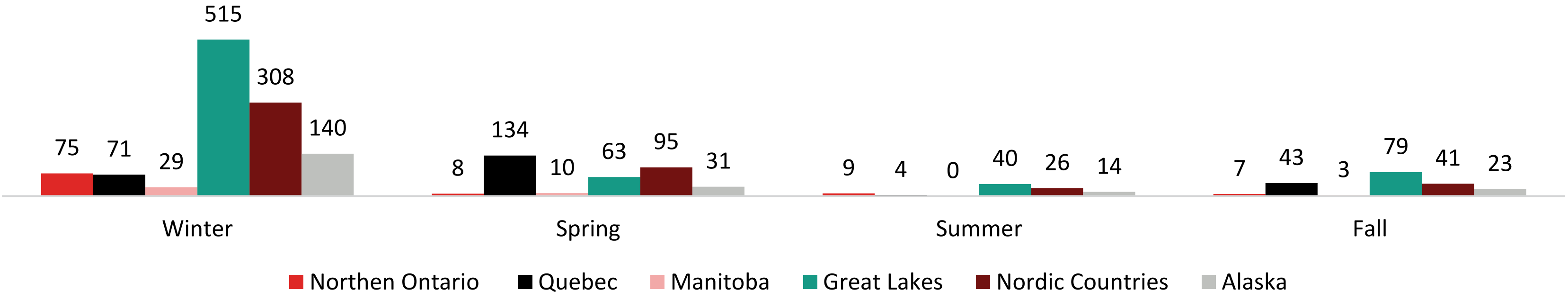


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Snowmobiling

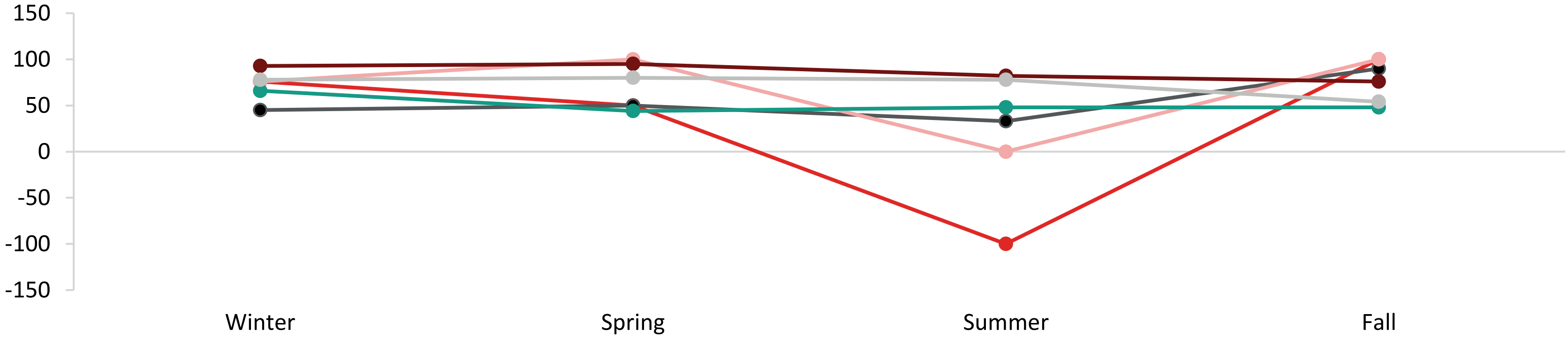
Conversation Trends

Snowmobiling conversations predictably spike in Winter, with Great Lakes states, Nordic countries, and Alaska generating the most volume.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



Source: Digital Listening

Winter is the key season to promote Northern Ontario's snowmobiling experiences.

To compete, tourism businesses should boost marketing during this window-targeting snowmobilers online when they're actively researching trips-to raise Northern Ontario's profile and attract winter travellers.

AUTO / RV TOURING

12

Solid appeal, but lags top competitors.

Northern Ontario ranks mid-pack for RV touring appeal-above Australia/New Zealand and Quebec-but trails behind the Great Lakes States and Northeast USA, largely due to perceptions of limited convenience and accessibility.

Spring and summer are critical planning windows.

Digital conversations spike in spring for Australia/New Zealand and summer for the Northeast USA. Northern Ontario sees minimal conversation, indicating missed visibility during peak planning periods.

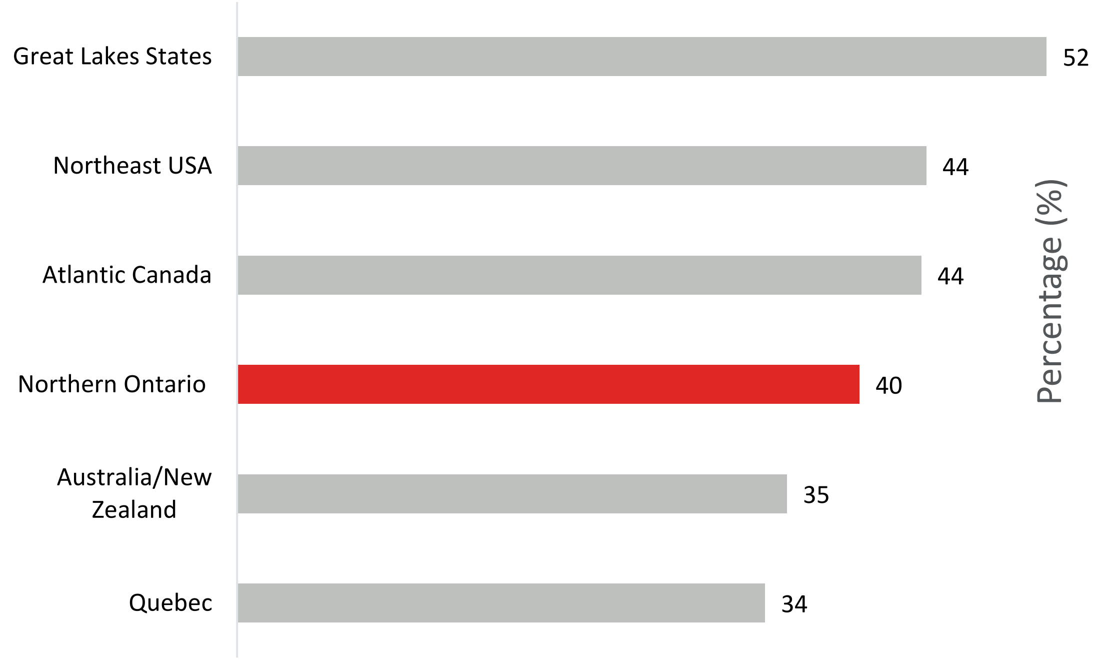
Opportunity to build awareness and leverage positive sentiment.

While overall sentiment towards RV touring is positive across markets, Northern Ontario could look to strengthen its presence during high-interest seasons.

Appeal and Associations

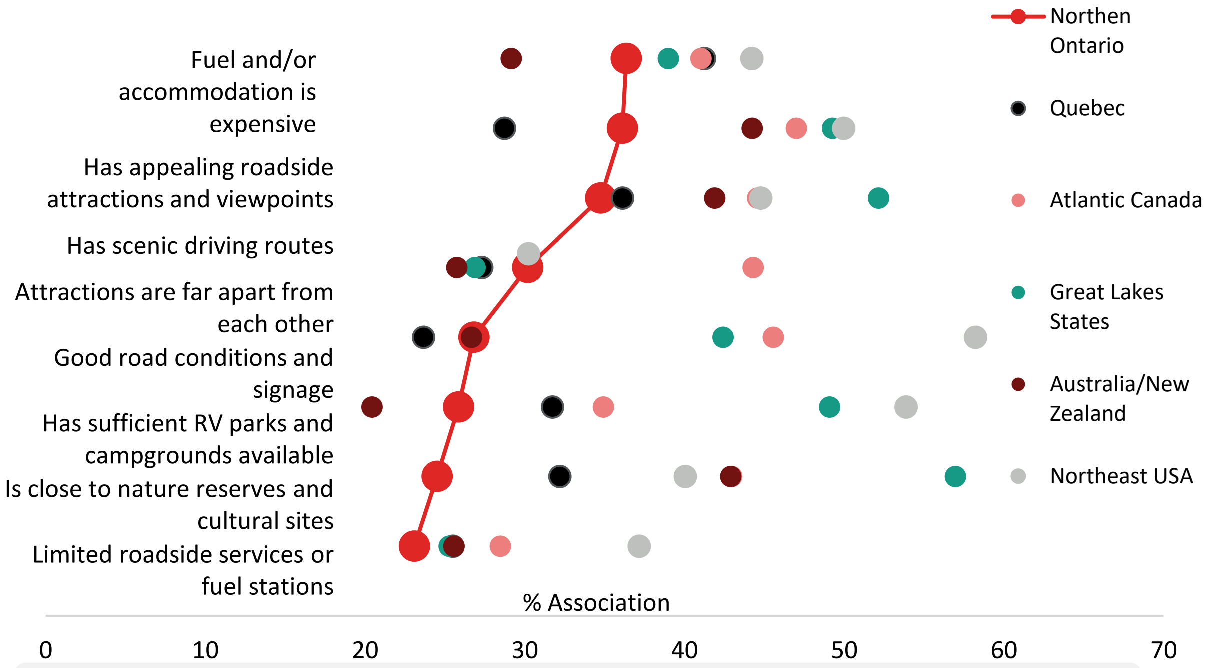
Northern Ontario ranks above Australia, New Zealand, and Quebec in RV touring appeal but trails the U.S. and Atlantic Canada, lacking proximity and convenience compared to Northeast USA and the Great Lakes States.

APPEAL



Q: When thinking about Auto / RV Touring when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

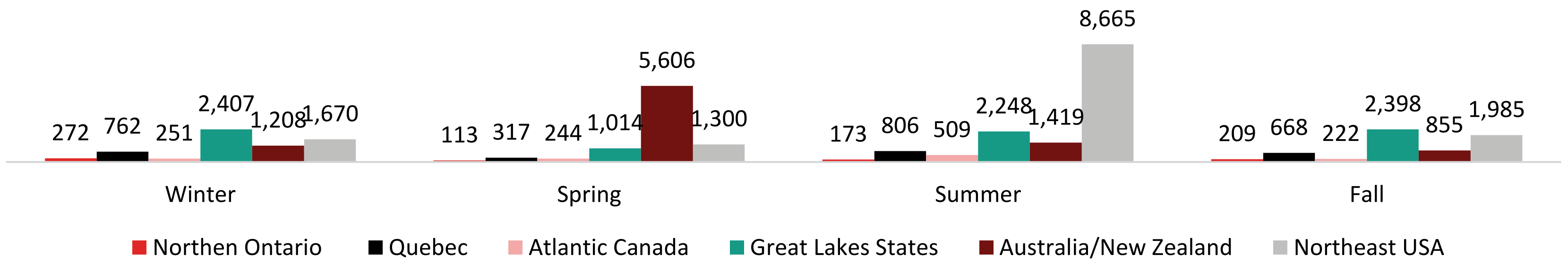


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about RV Touring

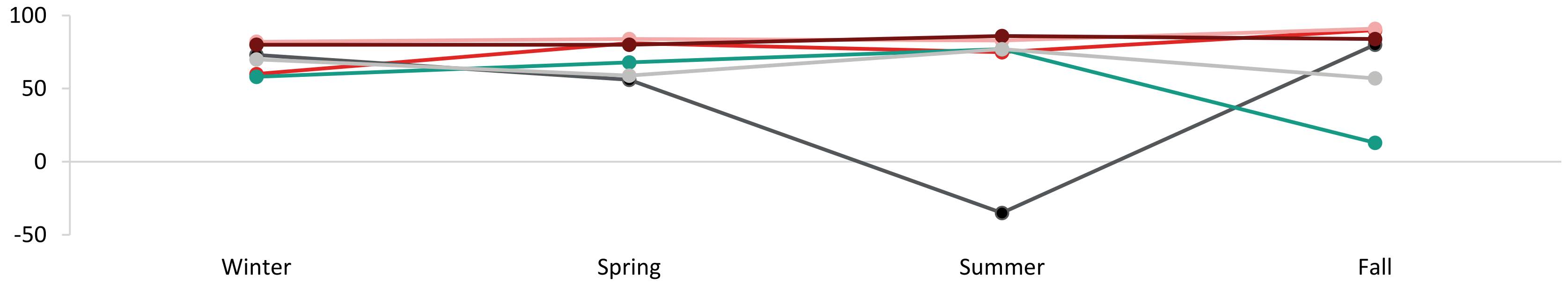
Conversation Trends

Auto/RV touring digital conversations peak in spring for Australia/New Zealand and in summer for the Northeast USA, signalling when travellers are most actively researching these trips.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



Both regions dominate online buzz, while Northern Ontario sees minimal conversation volume around RV touring.

For Northern Ontario, the takeaway is the need to **grow visibility in the RV touring space, especially leading into spring and summer when interest is highest.**

With generally positive sentiment across markets, there's potential for Ontario to position itself as a scenic, welcoming destination for RV and auto travellers.

Source: Digital Listening

13

MOTORCYCLING

Northern Ontario faces strong competition in motorcycling appeal.
There is an opportunity to strengthen its positioning by emphasizing road safety, scenic routes, and community events.

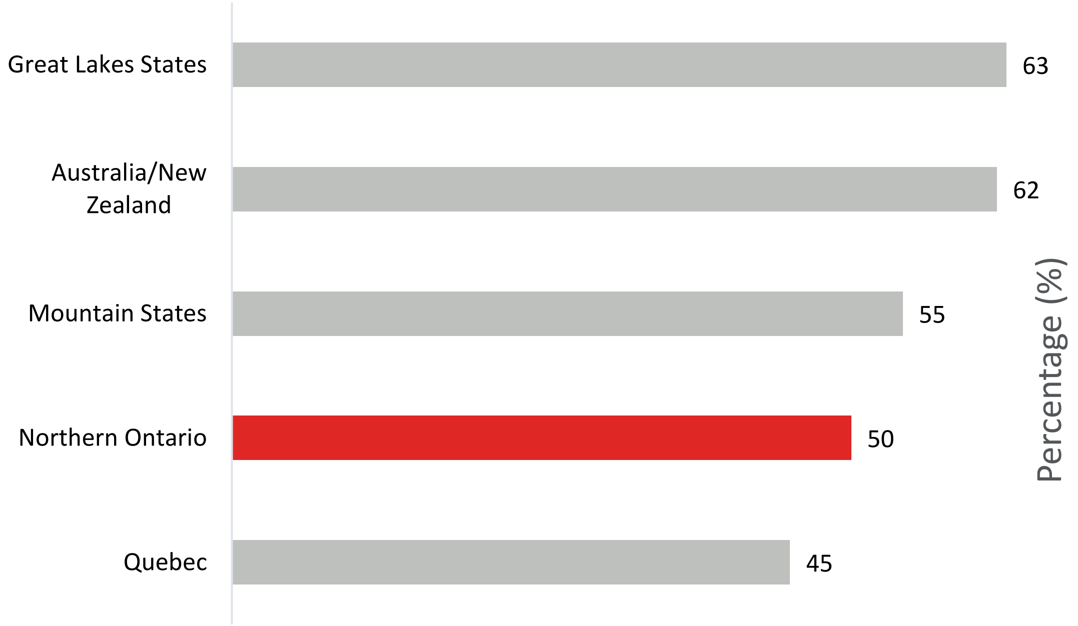
Winter months dominate digital interest and conversations.
Online conversations around motorcycling peak in winter, driven by competitor regions. Northern Ontario sees limited share, signalling the need to dial up marketing efforts during this season when riders are most engaged.

Improving associations can boost visibility and appeal.
Northern Ontario lags behind competitors on key attributes like rest stops and safety. Enhancing these offerings-and promoting them-could help shift perceptions and grow the region’s motorcycling appeal.

Appeal and Associations

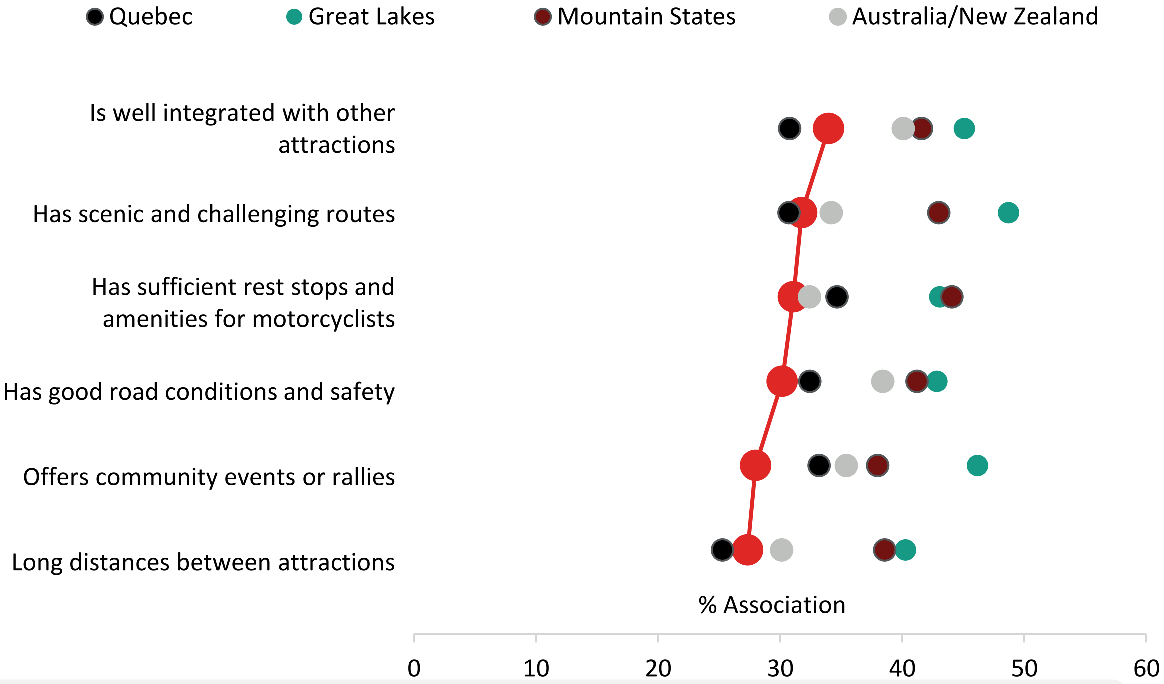
Northern Ontario falls behind the Great Lake States, Australia, New Zealand, and Nordic countries in motorcycling appeal and key product attributes.

APPEAL



Q: When thinking about Snowmobiling when you are on holiday, please rate the following destination in terms of their overall appeal for the activity. (Top 3 Box)

ASSOCIATIONS

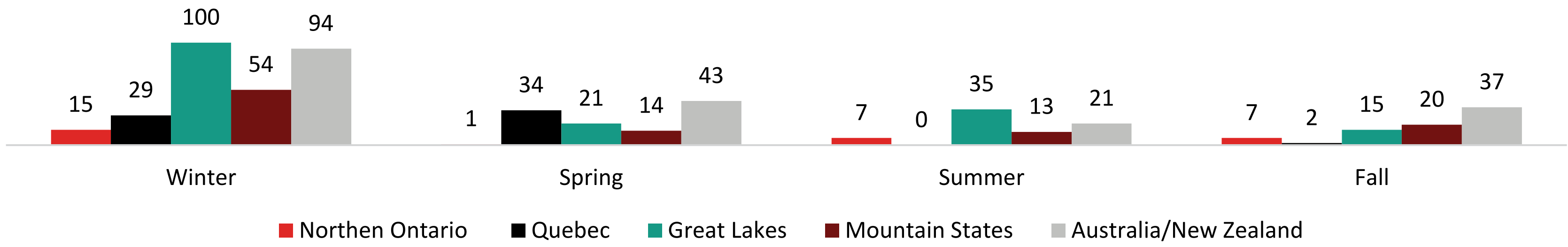


Q: For each attribute, please indicate which of these destinations you associate with it when thinking about Motorcycling

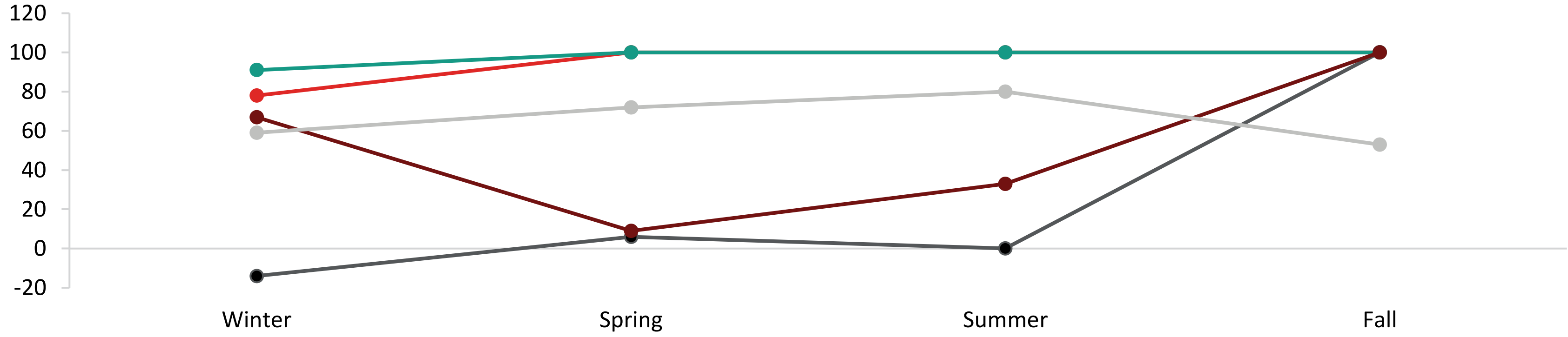
Conversation Trends

Motorcycling conversion volumes are dominated by Great Lakes states, Aus/NZ, and Mountain states during the Winter months.

DIGITAL CONVERSATION VOLUMES



DIGITAL NET SENTIMENT



For Northern Ontario and other destinations, the key takeaway is that targeting **winter marketing efforts towards motorcycle enthusiasts could help capture attention when travellers are actively searching and planning trips online.**

Additionally, maintaining positive sentiment-as shown in the net sentiment chart-is crucial for staying competitive and relevant during this peak window.

Source: Digital Listening

Winter appeal & wildlife associations could be the key to Northern Ontario’s growth.

Snowmobiling has the highest appeal for Northern Ontario
Snowmobiling stands out as the most attractive offering in Northern Ontario, benefiting from the region's abundant snowfall and extensive trails.

Wildlife & scenic outdoor activities are strong selling points
The wilderness, pristine lakes create an experience that sets the region apart. By focusing on these strengths, Northern Ontario can differentiate itself.

Northern Ontario can leverage its winter weather to drive growth.
The region’s harsh winters provide a unique advantage in winter-based tourism, particularly leveraging products such as ice fishing, existing snowmobiling appeal, dog sledding and skiing.

06

BEST-BET MARKETS

OVERVIEW

This section presents an analysis of the key source markets for travellers to Destination Northern Ontario, focusing on domestic travel within Canada and international travel from the United States and the United Kingdom. The section will illustrate the geographic distribution of travellers, highlighting core markets.

SECTION OVERVIEW

Objective:

The objective of this section is to provide a more detailed view of key source markets and their respective market sizes to understand the tourism potential in each.

Contents:

This section is broken down into three categories:

- Domestic Market: Regions within Canada.
- Regional Market: USA and key states within the USA that drive tourism.
- International Market: The UK market as the primary international driver.

Broken down by size per segment in each region.

Outcome:

Understanding the relative size of each segment across the key markets allows for a better understanding of the travellers to Northern Ontario, what content to market to each region and when to launch marketing campaigns based on key travel months per market.

QUICK LINKS

- Domestic Markets
- Regional Markets
- International Markets

Click on the above to jump to the relevant section.

Canada, USA and UK are key markets

The USA is a key source market for travellers to Northern Ontario, driven by its proximity and ease of travel.

Canada	**4.8 Million**
USA	**14.9 Million**
UK	**7.6 Million**

The majority of Northern Ontario’s domestic travellers come from the rest of Ontario, while California, New York, and Texas present the greatest potential in the US. The UK also offers a sizable market with over 7 million potential travellers.

To unlock this potential, marketing could focus on these high-potential regions, alongside **improving accessibility through stronger airline connectivity and partnerships with local travel agencies.**

Domestic Market: Canada

A significant portion of Northern Ontario travellers come from other parts of Canada with the rest of Ontario being the largest source of travellers.

Canada	Manitoba	Quebec	Ontario
Market Size			
Total	**265K**	**1.1m**	**3.4m**
Culture Seekers	76K	291K	1.2m
Paddlers	66K	211K	741K
Franco Travellers	22K	245K	346k
Outdoor Explorers	36K	96K	390K
Road Adventurers	21K	61K	273K

Travel Season

Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
	X	X	X
Sep	Oct	Nov	Dec

Regional Market: USA

California, New York, and Florida are the largest source states for travellers to Northern Ontario, with the majority falling into the culture seeker segment.

USA

Market Size

	California	Florida	Illinois	Michigan	Minnesota	New York	Ohio	Texas	Wisconsin
Total	**3.8m**	**1.7m**	**1.2m**	**879K**	**405K**	**2.4m**	**1.2m**	**2,7m**	**483k**
Culture Seekers	1.4m	686k	470k	299k	137k	889k	427k	1m	168k
Paddlers	785K	332K	226K	177K	90K	338K	231K	369K	87K
Franco Travellers	505K	186K	109K	65K	28K	408K	136K	329K	64K
Outdoor Explorers	314K	126K	129K	109K	57K	181K	134K	323K	58K
Road Adventurers	263K	131K	115K	100K	33K	228K	135K	264K	35K

Travel Season

Jan	Feb	Mar	Apr
May	Jun	Jul	Aug
X	X	X	
Sep	Oct	Nov	Dec

International Market: UK

Despite its distance, the UK is a key source market for Northern Ontario, with a total market size of 7.6 million.

UK **Total: 7.6m**

Market Size

Culture Seekers	2.8m
Paddlers	1.1m
Franco Travellers	692K
Outdoor Explorers	465K
Road Adventurers	492K

Travel Season

Jan	Feb	Mar	Apr
May X	Jun X	Jul X	Aug X
Sep X	Oct	Nov	Dec

Marketing & accessibility can unlock these high-potential markets.

- **The UK and USA are high-potential markets.**
  With over 20 million potential travellers, these regions present significant growth opportunities for Northern Ontario.
- **May to August are the high-value travel periods.**
  Peak travel demand naturally aligns with warmer months. It is critical to promote and offer irresistible travel experiences in the shoulder seasons.
- **Resolving barriers is key to unlocking these markets.**
  Addressing challenges like accessibility, travel costs and distance through improved airline connectivity and transportation options will be essential in increasing conversion from these markets.

07

Challenges & Opportunities

OVERVIEW

This section presents a summary of the challenges highlighted throughout the document and the corresponding opportunities that exist to enhance Northern Ontario's appeal as a top tier tourism destination for key traveller segments.

SECTION OVERVIEW

Objective:

The objective of this section is to summarize the challenges presented in various sections of this document. It also provides key areas of opportunity that can be capitalized.

Contents:

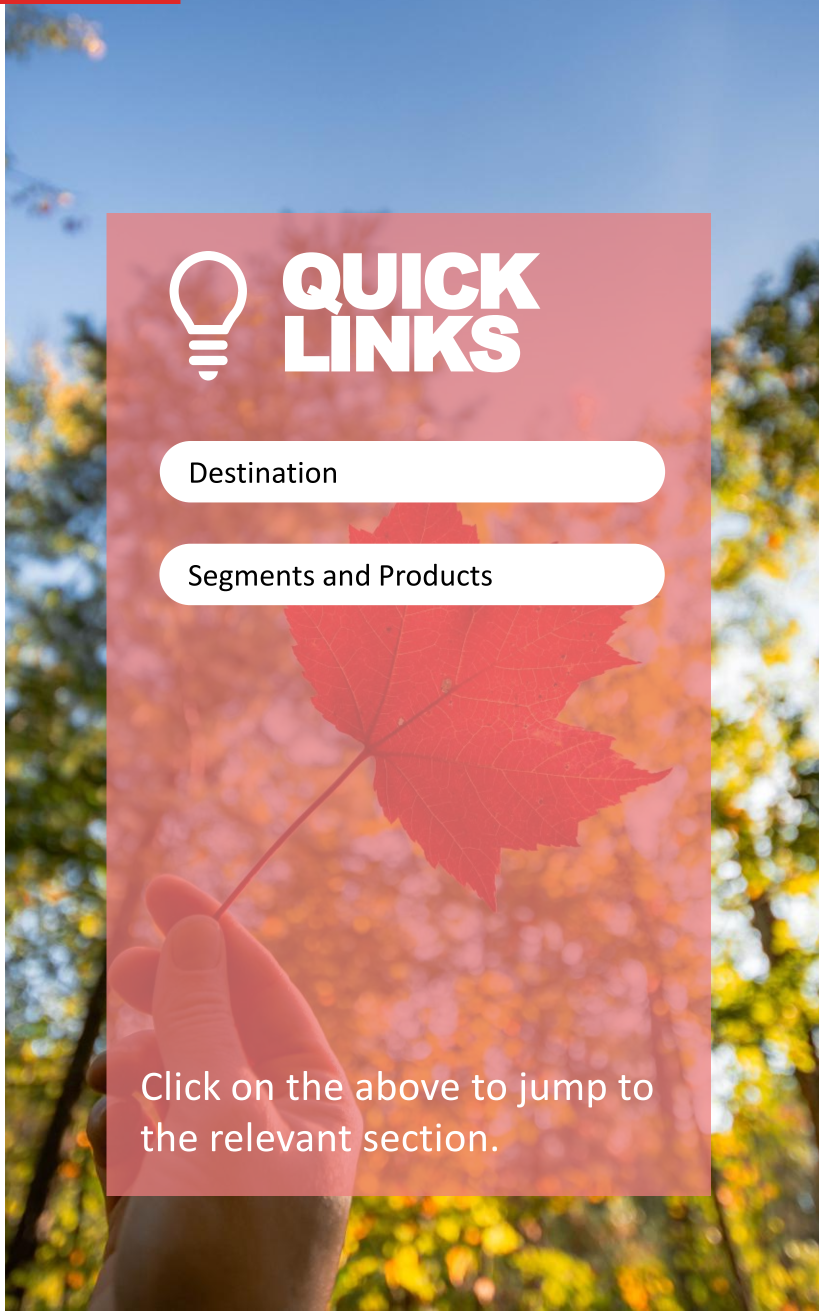
This section is broken down into two main categories:

- Destination challenges and opportunities.
- Segment and product-based challenges and opportunities.

Each highlighting where Northern Ontario’s offering, awareness and approach can be enhanced.

Outcome:

Identified challenges and opportunities set a firm direction for strategic decisions for the destination and inform key product owners of the most important traveller segments that apply to their offering, allowing for a more targeted approach for product development and marketing.



QUICK LINKS

Destination

Segments and Products

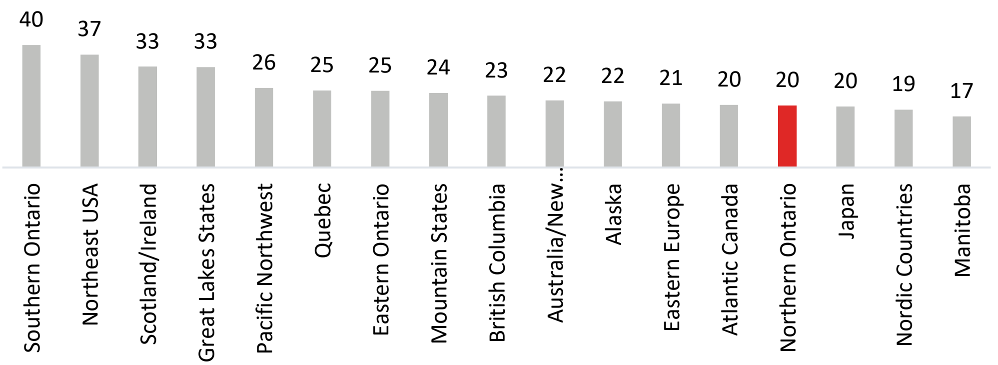
Click on the above to jump to the relevant section.

DESTINATION

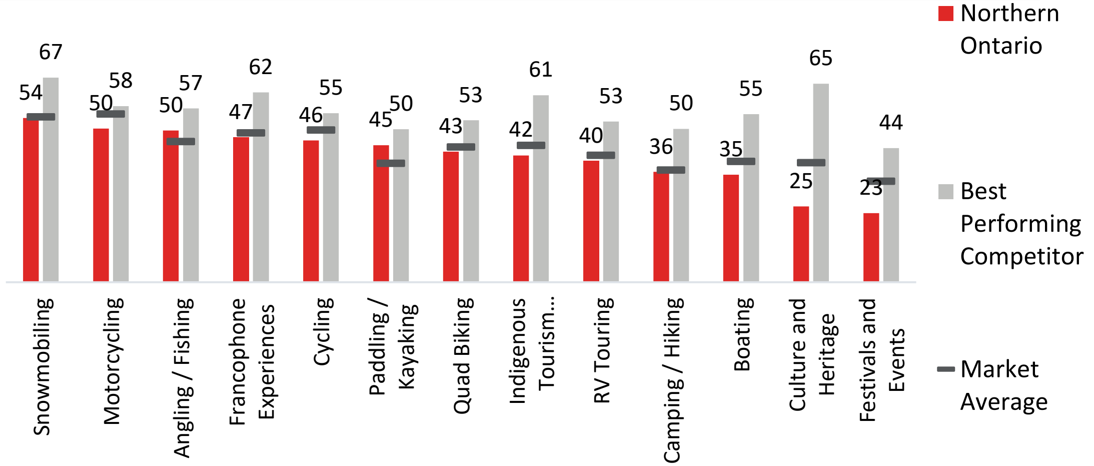
Challenge: Destination

Low Familiarity and Perceived Barriers Limit Northern Ontario’s Destination Appeal.

FAMILIARITY



DESTINATION APPEAL FOR ACTIVITIES



Top Perceptual Barriers to visitation to Northern Ontario

Weather Concerns	High Travel Costs	Seasonal Accessibility	Distance & Travel Time	Road Conditions	Remote Locations
43%	**40%**	**39%**	**38%**	**37%**	**37%**

Challenge: Destination

Low Familiarity, Weak Appeal, and Perceived Barriers Undermine Northern Ontario's Competitiveness.

	Observation	Implication
Familiarity	Low familiarity among travellers	Northern Ontario seems to **lack familiarity as a tourism destination**, which ultimately erodes positive impressions and likelihood to visit the region.
Appeal	Lags behind competitors in destination appeal for activities	Current perceptions of Northern Ontario's ability to deliver against key activities also lag the market and results in Northern Ontario **not being a market leader on anything**.
Barriers	High barriers to visitation possibly due to low familiarity	Unfamiliarity might also be leading to **misconceptions of travel barriers to the destination**: weather, costs, seasonal accessibility, road conditions, and transportation options are some of the top mentioned barriers to travel, but may not be as big of a concern if the destination is better known.

Opportunity: Destination

Building Awareness and Differentiation Can Help Northern Ontario Overcome Barriers and Shift Perceptions.

	Opportunity	Description
Familiarity	Boost Awareness through Targeted Marketing	• The first priority for the destination is to establish familiarity within its key markets with the destination, its features, and its strengths. • Leverage video storytelling and social media to create emotional connections with potential travellers.
Appeal	Improve Perception with Differentiation	• Develop compelling narratives showcasing Northern Ontario's distinct experiences (culture, nature, adventure). • Encourage past travellers to share experiences through referral programs, user-generated content, and social proof. • Use advocacy as a marketing tool-turn satisfied travellers into ambassadors for the region.
Barriers	Leverage past visitor experiences to address misconceptions	• Address misconceptions or gaps in perception through testimonials and immersive visuals. • Improve accessibility by working with travel agencies and transportation providers to make travel easier.

SEGMENTS & PRODUCTS

The addressable market size remains promising.

Addressable market size is high.
27 million travellers show potential to visit and opportunity to convert more.

Segment based approach is the way to go.
Targeting travellers using a segment approach can enable Northern Ontario to increase its appeal and awareness.

Dominant market segments should be prioritized.
Paddlers and Culture Seekers dominate the market in terms of size and opportunity.

Challenge: Segments and Products

Northern Ontario Faces Challenges Competing on Product Variety, Differentiation, and Year-Round Appeal.

	Observation	Implication
Product Variation	Lack of cosmopolitan attractions	Northern Ontario has a perceived lack of urban sophistication which discourages those seeking the comfort and safety of city life.
Differentiation	High competition	Northern Ontario's tourism sector faces intense competition both locally and internationally, requiring the region to differentiate its offerings to stand out and attract more travellers.
Travel Season	Seasonality challenges	There's an unmet need to create year-round experiences to make Northern Ontario a consistent travel destination.
Unique Experiences	Lack of unique experiences	Northern Ontario could potentially offer more unique activities, including Indigenous tourism, to provide deeper cultural experiences and education.

Opportunity: Segments and Products

Opportunity to Differentiate Northern Ontario by Enhancing Product Variety, Unique Experiences, and Seasonal Offerings.

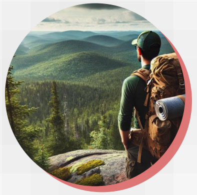
	Opportunity	Description
Product Variation	Enhancing Product Variety	Develop experiences that blend outdoor activities with premium, comfortable offerings, appealing to travellers who seek a mix of nature and modern convenience. Expand urban-style amenities where possible.
Differentiation	Strong Differentiation	Focus on storytelling and branding to distinguish Northern Ontario's experiences from competitors. Highlight what makes the region uniquely appealing, such as its untouched wilderness, Indigenous cultural experiences, and outdoor tourism.
Travel Season	Addressing Seasonality	Invest in year-round tourism strategies, including winter sports, fall foliage tours, and off-season outdoor experiences. Encourage repeat visitation by creating distinct seasonal offerings.
Unique Experiences	Curating Unique Experiences	Strengthen Indigenous tourism, eco-tourism, and immersive outdoor offerings. Focus on developing high-quality guided experiences and niche-market attractions that provide deep engagement.
Target Segments	Targeting High Value Segments	Prioritize investment in segments with the greatest return potential-such as Paddlers, Outdoor Explorers, Road Adventurers, and Culture Seekers-while de-prioritizing low-yield segments.

Opportunity: Segments and Products

Target High-Opportunity Segments Like Paddlers and Outdoor Explorers, While Repositioning Culture Seekers and Prioritizing Investment for Growth Potential.

Paddlers

The best current opportunity for Northern Ontario. This is the second largest segment (22%) and already aligns with the market average in experience delivery. The focus should potentially be on strong communication of existing offerings with minimal infrastructure or product investment.



Outdoor Explorers

A secondary opportunity due to its smaller size (11%) but can be improved with limited product or infrastructure investment. Snowmobiling and Angling outperform in appeal and should be leveraged as anchor activities.

Road Adventurers

Another secondary opportunity (9%) where Quad Biking and Motorcycling underperform the market substantially. Investment in these specific activities may yield better engagement and growth.

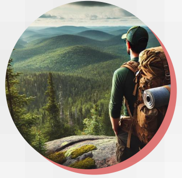
Culture Seekers

The largest segment (44%) but significantly underperforms in appeal. Requires strong repositioning of Northern Ontario's cultural offerings and narratives to improve perception. This could be a high-reward opportunity if executed well.

Franco Travellers

A small segment (13%) that underperforms significantly. Given the required effort and investment, it may not be a priority for growth. Instead, resources could be allocated to higher-opportunity segments.

Strategic Markets, Strengths and Channels

	Primary Priority	Secondary Priorities		Improve Positioning
				
	PADDLERS	**OUTDOOR EXPLORERS**	**ROAD ADVENTURERS**	**CULTURE SEEKERS**
KEY MARKETS	• Manitoba • Minnesota • Ontario • California • Michigan	• Manitoba • Minnesota • Michigan • Wisconsin • Texas	• Michigan • Ohio • Texas • New York • Illinois	• UK • Florida • Texas • Illinois • New York
STRENGTHS	• Variety of paddling routes • Easy waterways	• Nature • Variety of fish species • Wildlife • Safety • Calm Waters	• Scenic routes and winter landscapes • Trail Variety • Cost of rentals and equipment • Fuel and accommodation costs (RV-ing) • Distance between attractions	• N/A
COMMUNICATION CHANNELS	• Social Media • Influencers	• Social Media (Facebook)	• Social Media • Influencers	• Word of mouth • Destination website • Partner websites (airlines, hotels)

Areas of improvement and Barriers

Northern Ontario could investigate improving accessibility, amenities, and safety to better attract paddlers, explorers, road adventurers, and culture seekers. Targeted investments and stronger promotion of year-round, distinct experiences can help convert traveller interests into visits.

Segment Activation Blueprint

Primary Priority

Secondary Priorities

Improve Positioning

PADDLERS

- To better attract paddlers, Northern Ontario needs to make improvements to its wildlife and nature accessibility, addressing uncertainties around weather, and ensure the availability of paddling equipment.
- Northern Ontario offers strong paddling experiences but could improve efforts to convert traveller interest into actual visits.
- High travel costs, limited access make it challenging for paddlers to visit Northern Ontario and enjoy its water-based activities.

OUTDOOR EXPLORERS

- Improvements to large lakes access is needed. Hiking trail availability and maintenance, and safety provisions are also required.
- The competition from South Ontario for outdoor explorers offers Northern Ontario a strategic opportunity to attract travellers who are considering Southern Ontario for outdoor adventures.
- Limited healthcare access, unpredictable weather, and high travel costs pose key challenges given the physically demands and safety considerations outdoor explorer activities.

ROAD ADVENTURERS

- For the region to attract road adventurers, it could improve proximity to accommodations.
- Integration of motorcycling routes with attractions, upgrading amenities and safety along motor routes is also required.
- Enhancing winter routes and ensuring sufficient RV-park availability is also key.
- Northern Ontario could address poor weather perceptions, limited transport, and lack of distinct experiences to boost its appeal and attract more travellers.

CULTURE SEEKERS

- Awareness of cultural offerings in the destination is currently low, but there is room to grow through promoting landmarks and museums, increasing cultural and seasonal event offerings and emphasizing community atmosphere and Indigenous experiences.
- To attract culture seekers, Northern Ontario could overcome negative perceptions by improving accessibility, promoting safety, and showcasing its year-round cultural appeal.

Northern Ontario's potential is within reach.

Boosting awareness is the first step.
The more people know about the destination, the more likely they are to visit and recommend it to their friends and family.

Beating barriers through education.
The only way to deal with misconceptions and gaps in understanding is to educate travellers.

Targeting leads to greater conversion.
A targeted approach lands better leads. Use a segmented approach to streamline and optimize marketing and positioning efforts.

08

Recommendations

OVERVIEW

Northern Ontario can compete with key international and local destinations for travellers and firm its position as a travel destination of choice through strategic interventions. To capitalize on the destinations vast landscape and product offerings, awareness is key to gain travellers attention.

SECTION OVERVIEW

Objective:

The objective of this section is to provide recommendations to strengthen Northern Ontario's tourism positioning. Recommendations are provided within the four categories listed below, with details on implementation timing and prioritization as well providing the rationale for the recommendations listed.

Contents:

This section is broken down into four categories:

- Branding and Positioning
- Marketing, PR and Communications
- Product Development
- Investment Attraction

Outcome:

Actionable recommendations that users of the document can retrieve and apply, to enable tourism in the region, create destination awareness and attract tourists to Northern Ontario.

QUICK LINKS

- Branding and Positioning
- Marketing, PR & Communications
- Product Development
- Investment Attraction

Click on the above to jump to the relevant section.

1.0 Branding and Positioning

RECOMMENDATIONS

	Recommendation	Description
1	**Position Northern Ontario as Canada's Premier Paddling and Water Outdoor Tourism Destination**	Develop a brand narrative that anchors Northern Ontario as *the* top paddling and freshwater outdoor destination in Canada. Leverage the region's natural assets (lakes, rivers, remote wilderness) and strong segment appeal. Embed this identity in all core messaging, digital assets, and partnership campaigns with paddling associations and outfitters.
2	**Reframe Remoteness and Size as Northern Ontario's Unique Strength**	Shift the perception of Northern Ontario's vastness and remoteness from a barrier to a unique value proposition. Develop messaging that promotes Northern Ontario as a place for 'True Wilderness Escapes'- an antidote to urban stress, offering space, solitude, and immersive nature-based experiences.
3	**Strengthen Cultural Identity by Showcasing Indigenous and Local Storytelling**	Integrate Indigenous and local cultural experiences into the regional brand positioning. Collaborate with Indigenous tourism operators to co-create storytelling content, cultural itineraries, and campaigns that reflect authentic Indigenous heritage, aligning with the Culture Seekers segment and adding depth to the Northern Ontario narrative.
4	**Establish Seasonal Brand Pillars to Combat Weather-Related Perceptions**	Build seasonal positioning frameworks that highlight distinct experiences per season (e.g., Fall colours, Winter adventures, Spring paddling, Summer road trips). This reframes weather seasonality as an asset, rather than a deterrent, and helps lengthen the tourism season. This will also align people's expectations for weather during certain periods of the year.
5	**Modernize the Northern Ontario Visual and Verbal Identity**	Refresh creative assets-logos, photography, video, and copy-used in domestic and international marketing. Focus on aspirational, experience-driven visuals that appeal to younger segments (Gen Y, Millennials) while balancing rugged authenticity for outdoor travellers.

1.0 Branding and Positioning

IMPLEMENTATION

Recommendation	Applicable Segment(s)	Timeline	Impact (1-5)	Ease (1-5)	Impact x Ease Score	Ownership
Position Northern Ontario as Canada's Premier Paddling and Water Outdoor Tourism Destination	Paddlers, Outdoor Explorers	Short-Term	5	4	20	DNO (lead), Local Operators, Paddling Associations, PMOs (lead)
Reframe Remoteness and Size as Northern Ontario's Unique Strength	All Segments	Short-Term	5	3	15	DNO (lead), DMOs, Marketing Partners, PMOs (lead)
Strengthen Cultural Identity by Showcasing Indigenous and Local Storytelling	Culture Seekers, All Segments	Medium-Term	5	2	10	DNO (facilitator), Indigenous Tourism Operators, Local DMOs, PMOs (facilitator)
Establish Seasonal Brand Pillars to Combat Weather-Related Perceptions	All Segments	Medium-Term	4	4	16	DNO (lead), DMOs, Content Creators, PMOs (support)
Modernize the Northern Ontario Visual and Verbal Identity	All Segments	Short-Term	4	3	12	DNO (lead), Branding Agency, DMOs, PMOs (lead)

1.0 Branding and Positioning

RATIONALE

Key Observations from the report	Recommendation Justification	Priority Reasoning
Low awareness (20%), low intent (25%), but high satisfaction (60% advocacy)	**Position Northern Ontario as Canada's Paddling Hub** directly leverages its strongest existing product.	High impact, easy to implement-short-term priority to address awareness barrier.
Remoteness is a barrier but also a strength if reframed	**Reframe size/remoteness as "True Wilderness"** to shift perception.	Early, cost-effective win aligned to changing perception.
Cultural products underperform (44% size, weak appeal)	**Integrate Indigenous/local storytelling** to reposition Culture Seekers appeal.	Medium-term due to development complexity.
Weather is a recurring barrier	**Seasonal Brand Pillars** create year-round relevancy.	Medium priority, supports long-term brand resilience.

2.0 Marketing, PR and Communications

RECOMMENDATIONS

	Recommendation	Description
1	**Launch Targeted Digital Campaigns by Segment and Activity**	Develop digital marketing campaigns focused on specific activity segments (Paddlers, Culture Seekers, Road Adventurers, Outdoor Explorers). Use social media, search, video, and programmatic ads showcasing experiences tailored to each group's interests, travel seasons, and pain points. Target both domestic (Ontario, Quebec, Manitoba) and priority US/UK markets.
2	**Develop a "My Northern Ontario Story" UGC Campaign**	Encourage past travellers to share authentic stories, photos, and videos of their experiences in Northern Ontario across social media and campaign microsites. This helps build social proof, dispels misconceptions (weather, remoteness), and creates relatable content to inspire new travellers and turn adverse weather and remote conditions into a strength rather than a liability.
3	**Leverage Travel Trade, Influencers, and Media Partnerships**	Partner with travel media, niche influencers (paddling, culture, RVing), and the travel trade to build awareness and excitement. Host fam trips, offer packaged itineraries, and work with regional DMOs to coordinate efforts. Prioritize storytelling around Northern Ontario's unique seasonal and cultural offerings.
4	**Run Myth-Busting Content Series (Weather, Accessibility, Product Depth)**	Create a multi-channel content series that directly tackles common barriers: weather concerns, distance, access, and perceived lack of activities. Use real traveller testimonials, highlight transportation options, and promote four-season itineraries to reshape perceptions.
5	**Enhance Francophone Marketing for Quebec & Select US Markets**	Build targeted French-language marketing materials and campaigns for Quebec and US Francophone pockets. Ensure cultural relevance, language accessibility, and partnership with Francophone media to reach this niche market where ROI potential is higher.
6	**Launch Winter Motorcycle Marketing & Route Improvement Campaign**	Develop a marketing campaign targeting motorcycle enthusiasts during peak winter search periods. Complement with investments in key motorcycle route improvements, safety signage, and digital content to attract this niche segment online during the planning window.

2.0 Marketing, PR and Communications

IMPLEMENTATION

Recommendation	Applicable Segment(s)	Timeline	Impact (1-5)	Ease (1-5)	Impact x Ease Score	Ownership
Launch Targeted Digital Campaigns by Segment and Activity	All Segments	Short-Term	5	4	20	DNO (lead), DMOs, Digital Agencies, PMOs (lead)
Develop a "My Northern Ontario Story" UGC Campaign	All Segments	Short-Term	4	5	20	DNO (lead), DMOs, Operators, Past Travellers, PMOs (lead)
Leverage Travel Trade, Influencers, and Media Partnerships	All Segments	Medium-Term	4	3	12	DNO (lead), DMOs, Operators, Media Partners, PMOs (support)
Run Myth-Busting Content Series (Weather, Accessibility, Product Depth)	All Segments	Medium-Term	5	3	15	DNO (lead), Content Creators, DMOs, PMOs (lead)
Enhance Francophone Marketing for Quebec & Select US Markets	Franco Travellers, Quebec Market	Short-Term	3	4	12	DNO (lead), DMOs, Francophone Media Partners, PMOs (support)
Launch Winter Motorcycle Marketing & Route Improvement Campaign	Road Adventurers, Motorcycle Travellers	Short-Term	4	3	12	DNO (lead), Marketing Partners, Motorcycle Associations, Operators, PMOs (support)

2.0 Marketing, PR and Communications

RATIONALE

Key Observations from the report	Recommendation Justification	Priority Reasoning
Low familiarity and awareness, high advocacy potential	**Digital Targeted Campaigns and UGC ("My Northern Ontario Story")** leverage advocacy while boosting visibility	Immediate wins – high impact, high ease
Weather, distance, transportation barriers	**Myth-busting content series** educates, reshapes barriers	Mid-priority, medium effort
Winter motorcycle planning peaks online	**Winter Motorcycle Campaign + Route Upgrades** to capture this window	High value niche, short-term quick win
Franco segment underperforms	**Francophone-targeted marketing** only in priority pockets	Niche effort, lower impact, maintain tactical focus

3.0 Product and Experience Development

RECOMMENDATIONS

	Recommendation	Description
1	**Expand Paddling Infrastructure and Access Points**	Invest in enhancing paddling experiences by adding new access points, upgrading campsites, creating mapped routes, and providing safety signage. Prioritize well-known paddling rivers and lakes with high market potential to attract both domestic and international paddlers.
2	**Develop Indigenous and Cultural Tourism Itineraries**	Co-create new Indigenous and cultural tourism products with local communities. Build immersive, multi-day experiences that focus on storytelling, heritage, and arts. Ensure respectful collaboration and capacity-building for Indigenous operators.
3	**Improve Shoulder Season Product Offerings**	Identify key products (wildlife viewing, cultural festivals, hiking, ATV) that can extend the season. Package these into seasonal experiences with clear itineraries, pricing, and bundled offerings to make shoulder travel easier to book.
4	**Enhance Trail, Camping, and Road Trip Infrastructure**	Improve key road trip routes, trail systems, and camping amenities. Focus on comfort stations, signage, RV-friendly facilities, and viewpoints along scenic routes to appeal to Road Adventurers and Outdoor Explorers.
5	**Pilot Winter Product Expansion (Winter Festivals & Soft Adventure)**	Explore developing or expanding winter experiences like small-scale winter festivals, snowshoeing, dog sledding, and Indigenous storytelling around the winter season. Start with pilots in accessible hubs to test market potential.
6	**Enhance Road Trip Infrastructure, Rest Stops, and RV Facilities**	Invest in upgrading key scenic routes, improving road conditions, expanding RV-friendly infrastructure, and adding rest stops/viewpoints. This will reduce barriers for Road Adventurers and improve the overall experience, driving higher conversion from this segment.
7	**Create a Signature Annual Outdoor or Cultural Festival**	Establish a large-scale, destination-defining annual event (e.g., paddling race, cultural festival) that draws travellers nationally/internationally, increases shoulder-season demand, and differentiates Northern Ontario from competitors.
8	**Develop a Holistic Quad Biking Experience & Safety Program**	Create quad biking trails, safety infrastructure, and outdoor experiences as part of the Road outdoor tourism strategy. Integrate with existing attractions, promote guided tours, and ensure land use agreements.

3.0 Product and Experience Development

IMPLEMENTATION

Recommendation	Applicable Segment(s)	Timeline	Impact (1-5)	Ease (1-5)	Impact x Ease Score	Ownership
Expand Paddling Infrastructure and Access Points	Paddlers	Medium-Term	5	3	15	DNO (lead), Operators, Municipalities, Provincial Parks, PMOs (support)
Develop Indigenous and Cultural Tourism Itineraries	Culture Seekers, All Segments	Medium-Term	5	2	10	DNO (facilitator), Indigenous Tourism Operators, DMOs, PMOs (facilitator)
Improve Shoulder Season Product Offerings	All Segments	Medium-Term	4	4	16	DNO (lead), Operators, DMOs, PMOs (lead)
Enhance Trail, Camping, and Road Trip Infrastructure	Outdoor Explorers, Road Adventurers	Long-Term	4	3	12	DNO (lead), Municipalities, Provincial Parks, Private Operators, PMOs (support)
Pilot Winter Product Expansion (Winter Festivals & Soft Adventure)	All Segments	Medium-Term	4	3	12	DNO (lead), DMOs, Local Municipalities, Event Organizers, PMOs (support)
Enhance Road Trip Infrastructure, Rest Stops, and RV Facilities	Road Adventurers, Outdoor Explorers	Medium-Term	5	3	15	DNO (lead), Municipalities, Transportation Agencies, Private Operators, PMOs (support)
Create a Signature Annual Outdoor or Cultural Festival	All Segments	Medium-Term	5	2	10	DNO (lead), DMOs, Event Organizers, Municipalities, PMOs (lead)
Develop a Holistic Quad Biking Experience & Safety Program	Road Adventurers	Medium-Term	4	3	12	DNO (lead), Private Operators, Land Managers, Municipalities, PMOs (support)

3.0 Product and Experience Development

RATIONALE

Key Observations from the report	Recommendation Justification	Priority Reasoning
Road Adventurers have high familiarity and intent	**Road Infrastructure, Rest Stops, RV Upgrades** are conversion levers	Medium-high impact, phased medium-long term
Quad Biking weak, potential growth	**Holistic Quad Product Development** builds this underleveraged product	Medium-term priority tied to Road Adventurer growth
Paddling = best aligned / high potential	**Expand paddling routes, safety, infrastructure** with minimal spend	Medium-term investment with strong ROI

4.0 Investment Attraction

RECOMMENDATIONS

	Recommendation	Description
1	**Create a Northern Ontario Tourism Investment Prospectus**	Develop a professional investment prospectus highlighting key product gaps, market opportunities (paddling, Indigenous tourism, shoulder/winter season), and ROI potential. Use it to target government funding, private sector investors, and Indigenous economic development groups.
2	**Pursue Infrastructure Funding Partnerships (Public & Private)**	Identify and secure partnerships for co-investment in critical infrastructure (trails, campsites, access points, signage) through federal, provincial, and municipal programs. Engage private operators for matched investments where possible.
3	**Develop Incentives for New Experience Development in Underserved Areas**	Work with local municipalities and Indigenous partners to establish incentive programs (tax breaks, grants, low-interest loans) for businesses developing new tourism experiences in priority areas with growth potential but limited supply.
4	**Target Specialized Private Sector Investment (Outdoor Gear, Outfitters, Lodges)**	Actively seek private sector partners (outdoor retailers, outdoor outfitters, unique accommodation investors) to expand offerings aligned with priority segments like paddlers and outdoor explorers. Leverage the investment prospectus to pitch opportunities.
5	**Create an Investment Readiness Program for Local Operators**	Launch a support program to help existing and aspiring tourism operators prepare for investment. Include training on business planning, Indigenous business support, marketing, and product development alignment with regional priorities.

4.0 Investment Attraction

IMPLEMENTATION

Recommendation	Applicable Segment(s)	Timeline	Impact (1-5)	Ease (1-5)	Impact x Ease Score	Ownership
Create a Northern Ontario Tourism Investment Prospectus	All Segments	Short-Term	5	4	20	DNO (lead), Economic Development Partners, Municipalities, PMOs (lead)
Pursue Infrastructure Funding Partnerships (Public & Private)	All Segments	Medium-Term	5	3	15	DNO (lead), Municipalities, Provincial/Federal Governments, Private Sector, PMOs (lead)
Develop Incentives for New Experience Development in Underserved Areas	All Segments	Medium-Term	4	3	12	DNO (facilitator), Municipalities, Indigenous Partners, PMOs (facilitator)
Target Specialized Private Sector Investment (Outdoor Gear, Outfitters, Lodges)	Paddlers, Outdoor Explorers, Road Adventurers	Medium-Term	4	3	12	DNO (lead), DMOs, Private Sector, PMOs (lead)
Create an Investment Readiness Program for Local Operators	All Segments	Short-Term	4	4	16	DNO (lead), DMOs, Business Support Agencies, Indigenous Business Programs, PMOs (lead)

4.0 Investment Attraction

RATIONALE

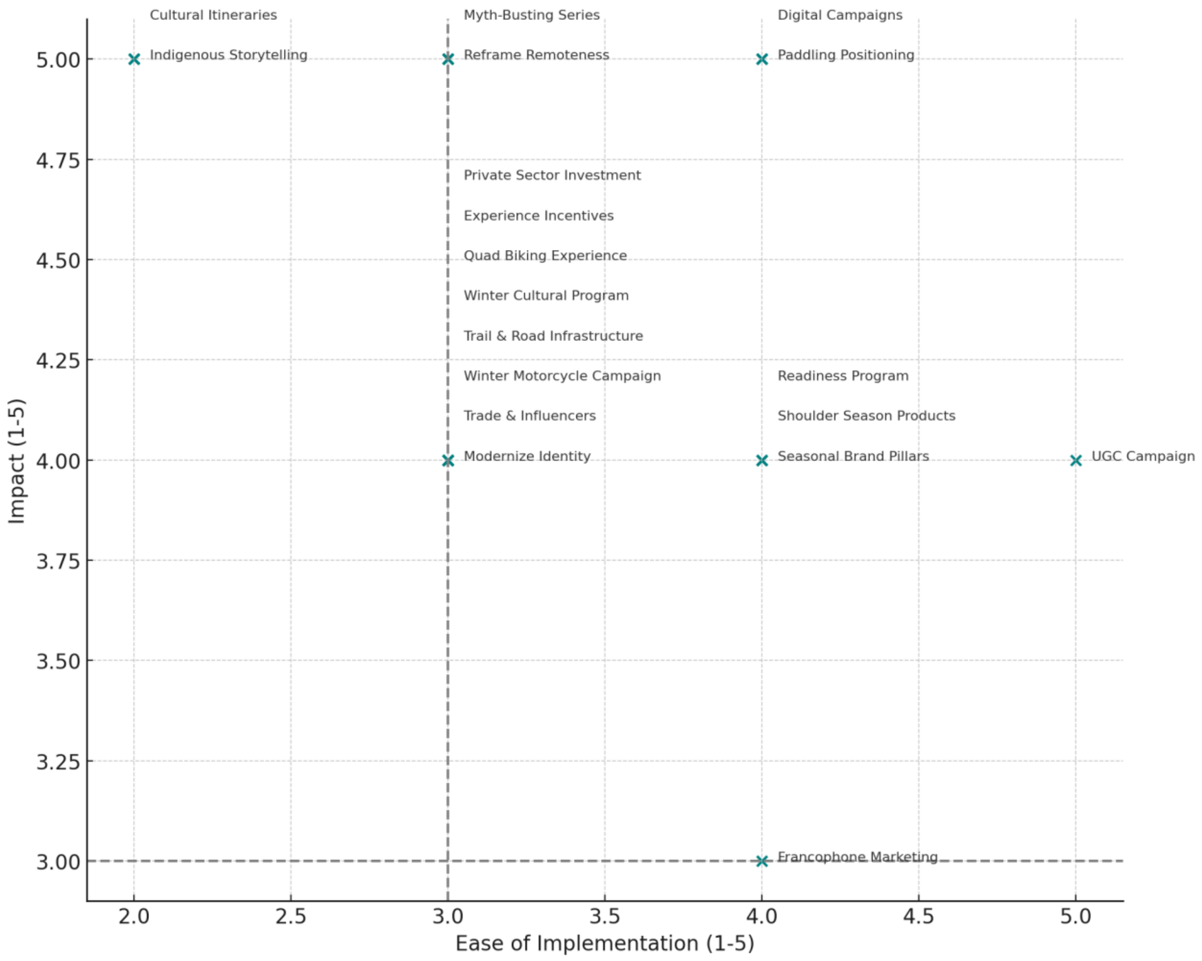
Key Observations from the report	Recommendation Justification	Priority Reasoning
Infrastructure gaps limit competitiveness	**Tourism Investment Prospectus + Partnerships** to unlock capital	Immediate short-term to medium-term priority
Operators lack readiness, private investment low	**Investment Readiness Program** builds capacity	Easy, high ROI early action
Need to attract niche private players (outfitters, gear)	**Targeted Private Sector Pitching** aligns with product growth priorities	Medium-term play, aligned with phased infrastructure work

Implementation Timeline

Activity	SHORT-TERM (0-12 Months)	MEDIUM-TERM (12-36 Months)	LONG-TERM (36-60 Months)
1 – BRANDING & POSITIONING			
Paddling Positioning	🟩		
Reframe Remoteness	🟩		
Modernize Identity	🟩		
Indigenous Storytelling		🟩	
Seasonal Brand Pillars		🟩	
2 – MARKETING & PR			
Digital Campaigns	🟥		
UGC Campaign	🟥		
Trade and Influencers		🟥	
Myth Busting Series		🟥	
Francophone Marketing	🟥		
Winter Motorcycle Campaign	🟥		
3 – PRODUCT DEVELOPMENT			
Paddling Infrastructure		🟨	
Cultural Itineraries		🟨	
Shoulder Season Products		🟨	
Trail & Road Infrastructure			🟨
Winter Cultural Program		🟨	
Quad Biking Experience		🟨	
Signature Festival			🟨
4 – INVESTMENT ATTRACTION			
Investment Prospectus	🟦		
Funding Partnerships		🟦	
Experience Incentives		🟦	
Private Sector Investment		🟦	
Readiness Programme	🟦		

Prioritization Matrix

Target High-Impact, Actionable Wins First.



Focusing on initiatives with **both high impact and ease of implementation-like digital campaigns, paddling positioning, and leveraging visitor advocacy, can deliver the fastest returns.**

These quick wins could help build momentum, strengthen brand presence, and start addressing Northern Ontario’s core awareness and intent challenges early.

DESTINATION
NORTHERN
ONTARIO

Thank You

Websites

Destination Northern Ontario / destinationnorthernontario.ca

Tourism Excellence North / tourismexcellencenorth.ca

Domestic Marketing / northernontario.travel

International Travel Trade / northernontarioitt.com

Contact Us

T: 705.575.9779

E: info@destinationnorthernontario.ca

Ontario