CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE I
Avid Anglers: All Anglers Report

Prepared for: Destination Ontario & Destination Northern Ontario (RTO13)

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CONTEXT IS EVERYTHING

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KEY OBJECTIVES

Overview:
CRG worked collaboratively with Destination Ontario (DO) and Destination Northern Ontario (RTO13) (DNO) to conduct a quantitative segmentation study of three priority traveller segments to Northern Ontario: Anglers, Hunters, and Outdoor Adventure tourists. The study updates and extends research conducted in 2014/15. Findings are designed to inform product development, investment attraction, and marketing, with a focus on identifying realistic growth opportunities grounded in the realities of travel in Northern Ontario.

Objectives:
The objectives of this survey are to evaluate:

- Segment profiles, trip characteristics, and behaviours
- Economic contribution and visitor spending, with particular attention to high-yield travellers staying in paid roofed lodging
- Perceptions of Northern Ontario as a destination for each segment's defining activity, and factors shaping overall satisfaction
- Key motivations and experience preferences driving destination selection within Northern Ontario
- Barriers and deterrents limiting visitation or constraining trip spend
- Opportunities for product development, service improvement, and experience packaging most likely to increase satisfaction, repeat visitation, and word-of-mouth
- Implications for DNO and DO marketing strategy, investment priorities, and regional dispersal across Northern Ontario's sub-regions



METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:
- 30 to 64 years old
- Participated in fishing with a focus on avid hobbyists
- Taken a pleasure trip anywhere in the past two years and/or planning a pleasure trip in the next two years
- Resident of one of the defined target markets: Canada (Ontario, Quebec, Manitoba, Western Canada), U.S. Drive (Minnesota, Wisconsin, Illinois, Michigan, Indiana, Ohio, Pennsylvania, New York, New Jersey), U.S. Fly (California, Colorado, Texas)

Avid Angler: The respondents who participate in fishing, have a fishing licence or had one recently, and have a high household income (CA: $75K+ / US: $50K+)

Total Sample:
- Avid Anglers: n=1,067

Fieldwork Date:
- May 14th – June 3rd, 2026

Median Length of Interview:
- 18.3 minutes



REGIONAL SAMPLE SIZE

Regional Sample Size

Total	1,067
Canada	247
Ontario	85
Quebec	43
Manitoba	47
Alberta	41
British Columbia	31

U.S. Drive	700
Illinois	94
Ohio	113
New York	79
Michigan	65
Wisconsin	103
Minnesota	74
Pennsylvania	67
Indiana	49
New Jersey	56

U.S. Fly	120
California	38
Colorado	40
Texas	42



METHODOLOGY

Survey Language:
The survey was administered in English and French

Margin of Error:
Avid Anglers: ± 3.0%

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

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

Weighting:
The results were weighted by age, gender, and region to ensure that the sample's composition reflects that of the relevant Canada and US populations.

Small Sample Sizes:
Small sample sizes are indicated with asterisks; results should be interpreted with caution.



METHODOLOGY

Understanding Our Source Markets:
This study applies Destination Ontario's market framework to priority Northern Ontario tourism experiences, sampling Ontario, Rest of Canada provinces, regional U.S. (Drive) and long-haul U.S. (Fly) markets.

Each market serves a distinct purpose:
- **Ontario:** Understand established domestic demand and opportunities to grow visitation and visitor value.
- **Rest of Canada:** Assess opportunities to attract travellers from other provinces.
- **U.S. Drive:** Examine traditional cross-border markets that are proximate and accessible.
- **U.S. Fly:** Assess opportunities to attract travellers from U.S. states farther afield.

These groupings reflect geographic source markets, not necessarily how visitors travel or their relative market priority.

Interpreting the Findings:
Market estimates reflect potential demand within the selected geographies, not forecast visitation. Findings should be considered alongside other practical factors, including existing visitation, travel motivations, and barriers.



DEFINITIONS

Avid angler: Aged 30–64, participates in fishing, holds a fishing licence or has held one in the past two years, and has a household income of $75K+ (Canada) or $50K+ (U.S.).

Markets: Ontario; Rest of Canada (Quebec, Manitoba, Alberta, British Columbia); U.S. Drive (Minnesota, Wisconsin, Illinois, Michigan, Indiana, Ohio, Pennsylvania, New York, New Jersey); U.S. Fly (California, Colorado, Texas).

Past visitors: Respondents who have visited Northern Ontario for a fishing trip in the past five years (51% of avid anglers, n=540).

Paid roofed lodging: A drive-in lodge or resort, fly-in or remote outpost camp, commercial cottage or cabin rental, hotel or motel, or AirBnB.

High-yield visitor: A past visitor who stayed in paid roofed lodging on their most recent Northern Ontario trip.

Travel party spend: Total spend by the travel party on the most recent Northern Ontario trip, including accommodation, food and drink, activities, equipment and transportation within the region, and excluding airfare and pre-trip shopping. Shown in Canadian dollars; U.S. responses converted at 1.394.

TOP2: The combined percentage of respondents who selected the two most positive responses on a rating scale (e.g., the top two points of a five-point scale).

Net Promoter Score (NPS): The percentage rating 9 or 10 out of 10 on likelihood to recommend, minus the percentage rating 0 to 6. Scores range from -100 to +100.

AVG: Average (mean) response.

▲ / ▼: Significantly higher or lower than the comparison groups, at the 95% confidence level.



REPORT VERSION

All Anglers report (this report)
All avid anglers, n=1,067

Covers who avid anglers are, how they travel, how they plan and book, what motivates them, how they see Northern Ontario, future demand and barriers. Results are shown by market and traveller type.

Read this report for the full picture of the avid angling segment, including those who have not yet visited Northern Ontario.

Past Visitors report
Avid anglers who have visited Northern Ontario for fishing in the past five years, n=540

Covers how often they visit, which regions they visit and their most recent trip: length, accommodation, spend, services used and rating. It also compares past visitors with all avid anglers on key measures.

Read this report to understand the existing visitor base and what sets it apart.

References to the other report read “slide X of the Past Visitors report.”



TRAVELLER TYPE SEGMENTS

Solo
Travellers who typically travel alone, without a partner or spouse, children, or friends in their travel party.

Partners
Travellers who typically travel with a partner or spouse only, without children or friends in their travel party.

Younger Families
Travellers aged 30–44 who typically travel with at least one child.

Older Families
Travellers aged 45–64 who typically travel with at least one child.

Younger Friends
Travellers aged 30–44 who typically travel with friends, without children in their travel party.

Older Friends
Travellers aged 45–64 who typically travel with friends, without children in their travel party.

Solo travellers are included in Overall but not shown separately because of small sample size.



NORTHERN ONTARIO - REGIONS

Northwest Ontario - Sunset Country
e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area

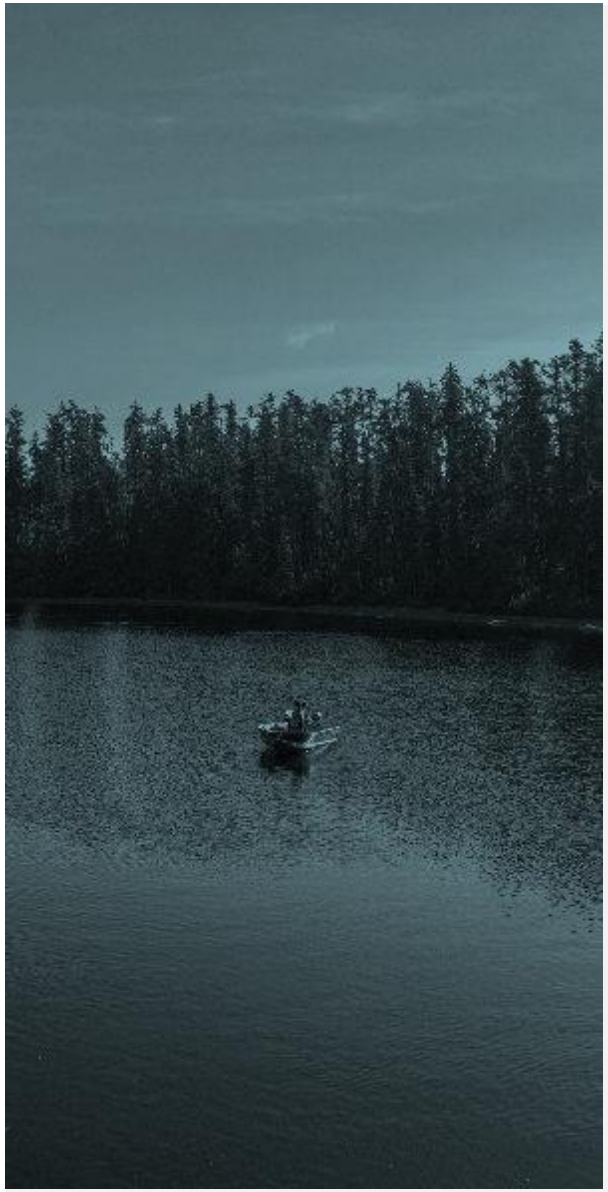
Northwest Ontario - Superior Country
e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area

North Central Ontario - Algoma Country
e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area

Northeast Ontario
e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area

The Great Canadian Wilderness
e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District





EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – PROFILE & TRIP BEHAVIOUR

ALL AVID ANGLERS

Anglers are long-time, family-introduced and focused on bass and trout. More than two-thirds (68%) have been fishing for more than 10 years, rising to 81% of older families and older friend groups, against 53% of younger families, and most (78%) were introduced by a family member. Bass (72%) and trout (70%) are the most targeted fish, followed by walleye (47%) and panfish (44%). Nearly all prefer gear or lure fishing (94%), while a third fly fish (33%), rising to 45% of U.S. Fly anglers, and a quarter ice fish (25%). (See slides 36–40, 45)

Fishing is a summer and spring pursuit with frequent, short trips. Anglers take an average of 4.0 overnight fishing trips a year of 3.4 nights, and are willing to travel 7.3 hours one way, falling to 5.6 hours among Ontario anglers. Summer (76%) and spring (63%) are the preferred seasons, with spring rising to 68% among U.S. Drive anglers and falling to 37% among Rest of Canada anglers. Most travel by personal vehicle (83%), and 45% with a trailer. (See slides 42–43, 48, 50, 52)

Most anglers combine their own gear with local operators. More than half (55%) use local outfitters or operators in addition to their own gear, rising to 63% of younger families, and a third (33%) mix guided and self-guided fishing, rising to 43% of younger families. Six in ten (61%) say working with a local operator is important, rising to 71% of younger families and falling to 44% of Ontario anglers. (See slides 53, 55, 70)

Planning blends word of mouth and online search. Word of mouth (56%) and internet search (51%) lead, followed by social media content (38%), with younger families relying more on social media (47%) and booking sites (41%). Most plan one to six months ahead and book directly with accommodation providers (57%) or online (48%), and six in ten (59%) are likely to use AI to plan, rising to 74% of younger families and falling to 40% of Rest of Canada anglers. (See slides 58, 60–65, 68, 71)



EXECUTIVE SUMMARY – MOTIVATIONS, VALUES & BARRIERS

ALL AVID ANGLERS

Anglers fish for escape, the catch and time in nature. Escape (64%), catching fish regardless of whether they keep them (64%), connection with nature (63%) and bonding with friends or family (59%) lead, with bonding falling to 31% among partners. Northern Lights viewing (50%), scenic driving (47%), wildlife viewing (47%) and local markets (46%) are the strongest add-ons, and younger families are more interested in multi-activity packages (37%) and youth introduction-to-fishing programs (29%). (See slides 73–80)

Anglers see fishing as part of conservation. Nearly all (93%) agree fishing is part of responsible, sustainable use of natural resources, and 92% feel a personal responsibility to protect the places they visit. Supporting local businesses (90%) and conservation (88%) lead destination considerations, and three-quarters (73%) would pay more for a clear conservation benefit, rising to 77% of U.S. Drive anglers and falling to 60% of Rest of Canada anglers. (See slides 93, 95–96)

Cost, weather and environmental disruptions are the main barriers. Cost (35%), unfavourable weather (30%), wildfires and other disruptions (28%), high transportation costs and expensive licensing (27% each) lead, with weather rising to 41% among older friend groups and poor road or water access to 37% among Ontario anglers. Anti-American sentiment is cited by 19% of U.S. Drive and 20% of U.S. Fly anglers, and more than half (57%) say financial pressures have affected their travel plans. (See slides 125–131)



EXECUTIVE SUMMARY – DESTINATION STRENGTH & FUTURE DEMAND

ALL AVID ANGLERS

Northern Ontario's fishing product is highly rated. Eight in ten anglers know a lot (33%) or a little (47%) about Northern Ontario. Among those who know it, 92% rate it 4 or 5 out of 5, including 55% excellent, and agree it offers a wide variety of fishing experiences and excellent fishing (95% each), pristine lakes and authentic wilderness experiences (94% each). (See slides 100–102, 104, 106)

Advocacy is strong among U.S. Drive anglers and weak among Rest of Canada anglers. Northern Ontario's Net Promoter Score is 39, rising to 47 among U.S. Drive anglers and older families, and falling to 27 among older friend groups and 12 among Rest of Canada anglers. Rest of Canada anglers are also less likely to say Northern Ontario is better than alternatives closer to home (57%, against 78% overall). (See slides 103–104)

Intent is strong, led by younger families and U.S. Drive anglers. Three-quarters (76%) are likely to visit in the next two years, including 44% who are very likely, rising to 87% of younger families and 80% of U.S. Drive anglers and falling to 56% of Rest of Canada anglers. Three-quarters would make Northern Ontario the only (29%) or primary (48%) destination of a fishing trip. (See slides 109–110)

Anglers want safety, nature and abundant fish, with road access and flexible lodging. Safety, getting away from it all and access to nature (93% each), and clear licensing, abundant fish stocks and quality fishing conditions (91% each) are the leading decision factors, and younger families place more importance on activities for companions (83%) and fishing events (60%). Most prefer road-accessible areas (86%), though 46% would consider remote boat-in access, and drive-in lodges and commercial cottages (44% each) are the preferred lodging. (See slides 112–116, 118)



EXECUTIVE SUMMARY – ESTABLISHED AUDIENCES & FUTURE GROWTH

ALL AVID ANGLERS

Angling balances an established base of older families with younger families driving future growth. Older families make up a quarter (25%) of the estimated market and remain central to it, although their trip frequency in Northern Ontario is generally stable or declining. Younger families are a slightly larger audience (27%), and they show the highest intent and are the most likely to be taking more Northern Ontario trips than they were 10 years ago. (See slides 29, 109, and slide 20 of the Past Visitors report)

Older families are the established base: experienced anglers who fish for time together. They are long-time anglers (81% fishing for more than 10 years), and escape (70%) and bonding with friends or family (64%) motivate them, with quality time with family and friends a leading measure of a successful trip (46%). They give one of the highest Net Promoter Scores (47), and 71% are likely to visit in the next two years. Scenic driving (46%) and wildlife viewing (45%) appeal, they plan through word of mouth (59%) and internet search (46%), and cost (34%) and weather (31%) are their main concerns. (See slides 37, 63–65, 75–76, 79–80, 83–84, 103, 128–130)

Younger families are the growth audience. They make up 27% of the estimated market, take 4.3 fishing trips a year, are the most likely to visit in the next two years (87%), and 34% are taking more Northern Ontario trips than 10 years ago. They are more interested in multi-activity packages (37%), youth introduction-to-fishing programs (29%), wellness experiences (30%) and fishing derbies (19%), 71% value working with local operators, and 74% are likely to use AI to plan. They rely more on social media content (47%) and online booking sites (41%), and use Instagram (66%) and TikTok (56%). (See slides 42, 63–65, 67, 70–71, 79–80, 109, and slide 20 of the Past Visitors report)



EXECUTIVE SUMMARY – SPEND, YIELD & ECONOMIC POTENTIAL

ALL AVID ANGLERS

Fishing trips to Northern Ontario are high-value. Travel parties spent an average of $3,342 on their most recent trip, about $750 per visitor over 4.1 nights (roughly $190 per visitor per night), and two-thirds (68%) stayed in paid roofed accommodation.

U.S. visitors deliver the highest yield. U.S. Fly anglers spend about $920 per visitor and U.S. Drive anglers about $860, against $380 for Ontario anglers, who take the shortest trips (3.7 nights). The U.S. markets make up 85% of the potential market but 92% of its potential value. Rest of Canada anglers stay longest (4.6 nights) but are the least likely to use paid roofed lodging (47%).

Couples spend the most per person, and families the most per trip. Partners spend about $1,360 per visitor because they travel in pairs, while older families spend the most per party ($3,677) and younger families are the most likely to use paid lodging (82%). Older friend groups spend about $980 per visitor but are the least likely to use paid lodging (51%).

Small gains in visitation or length of stay are worth a lot. Every 1,000 additional U.S. Drive anglers would bring about $860,000 in visitor spending and 4,100 visitor nights. Each extra night adds about $190 per visitor, which makes the levers to extend stays (better value, more for travel companions to do and quality paid accommodation) economically significant.



SPEND AND LENGTH OF STAY BY MARKET

ALL AVID ANGLERS

U.S. anglers spend the most per trip, per visitor and per night; Ontario anglers take the shortest, lowest-spend trips. Canadian anglers are also less likely to stay in paid roofed lodging.

Measure	Overall	Ontario	Rest of Canada	U.S. Drive	U.S. Fly
Average party spend per trip	$3,342	$1,630 ▼	$1,892 ▼	$3,886 ▲	$4,158
Average party size (people)	4.4	4.3	4.0	4.5	4.5
Spend per visitor per trip	$755	$378	$479	$857	$917
Average nights	4.1	3.7	4.6	4.1	3.8
Spend per visitor per night	$185	$102	$105	$210	$243
Stayed in paid roofed lodging	68%	56% ▼	47% ▼	74% ▲	80%

Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than the rest of the sample.



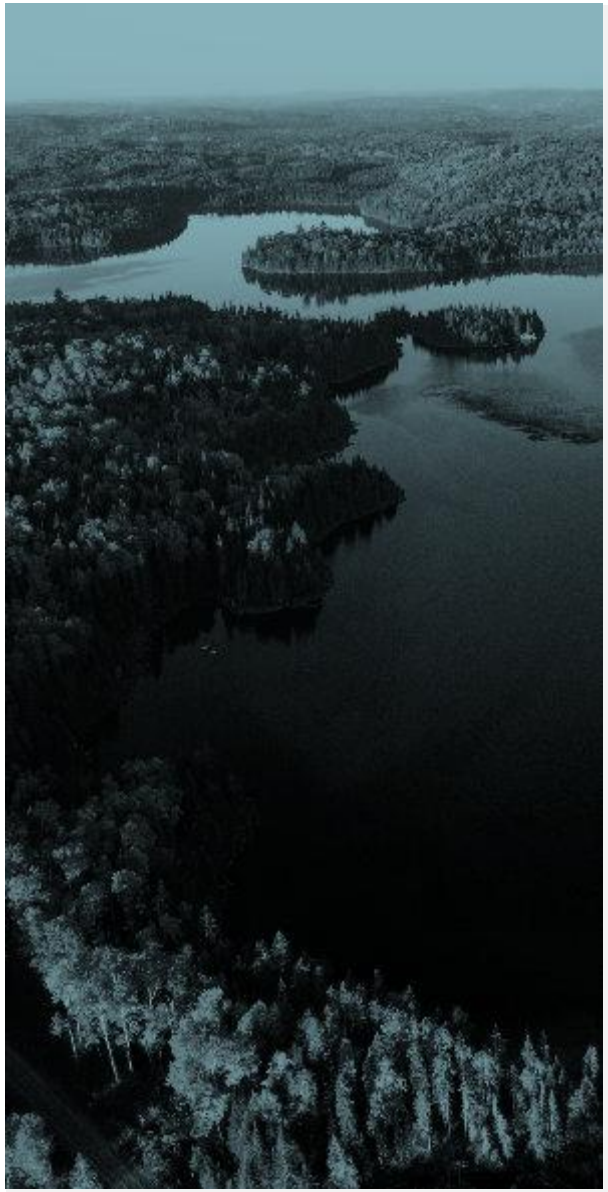
SPEND AND LENGTH OF STAY BY TRAVELLER TYPE

ALL AVID ANGLERS

Families spend the most per trip; partners spend the most per person. Younger families are the most likely to stay in paid roofed lodging (82%) and older friend groups the least (51%).

Measure	Overall	Partners	Younger families	Older families	Younger friends	Older friends
Average party spend per trip	$3,342	$2,729	$3,574	$3,677	$2,809	$3,601
Average party size (people)	4.4	2.0	5.5	5.5	4.1	3.7
Spend per visitor per trip	$755	$1,365	$645	$671	$687	$983
Average nights	4.1	4.3	4.2	4.3	3.7	3.8
Spend per visitor per night	$185	$315	$153	$154	$184	$259
Stayed in paid roofed lodging	68%	70%	82% ▲	67%	63%	51% ▼

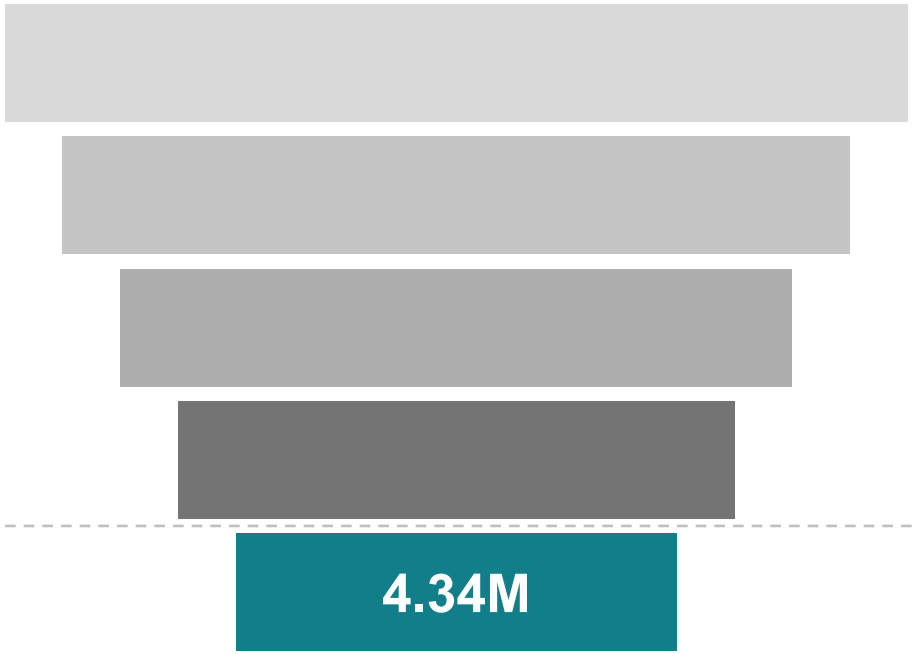
Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than the rest of the sample.



MARKET SUMMARY

HOW THE OPPORTUNITY POOL IS BUILT: AVID ANGLERS

Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)



Population of the surveyed markets
Total population across the 17 surveyed provinces and states.

Fishing participants
Residents who fish.

Aged 30–64
Fishing participants within the study's target age range.

Total addressable market
Anglers who also meet the study's household income threshold.

Opportunity pool
Anglers who intend to visit Northern Ontario for a fishing trip within the next two years.

The opportunity pool represents potential, not a forecast of visitors.
Stated travel intentions typically exceed actual visitation, so only a portion of the opportunity pool is expected to visit.

Bars are not to scale. Population: U.S. Census Bureau and Statistics Canada. Participation and income: published research and census data. Intent: Phase 1 survey. Income threshold: $75K+ CAD (Canada), $50K+ USD (U.S.).

ESTIMATED NORTHERN ONTARIO OPPORTUNITY POOL: AVID ANGLERS

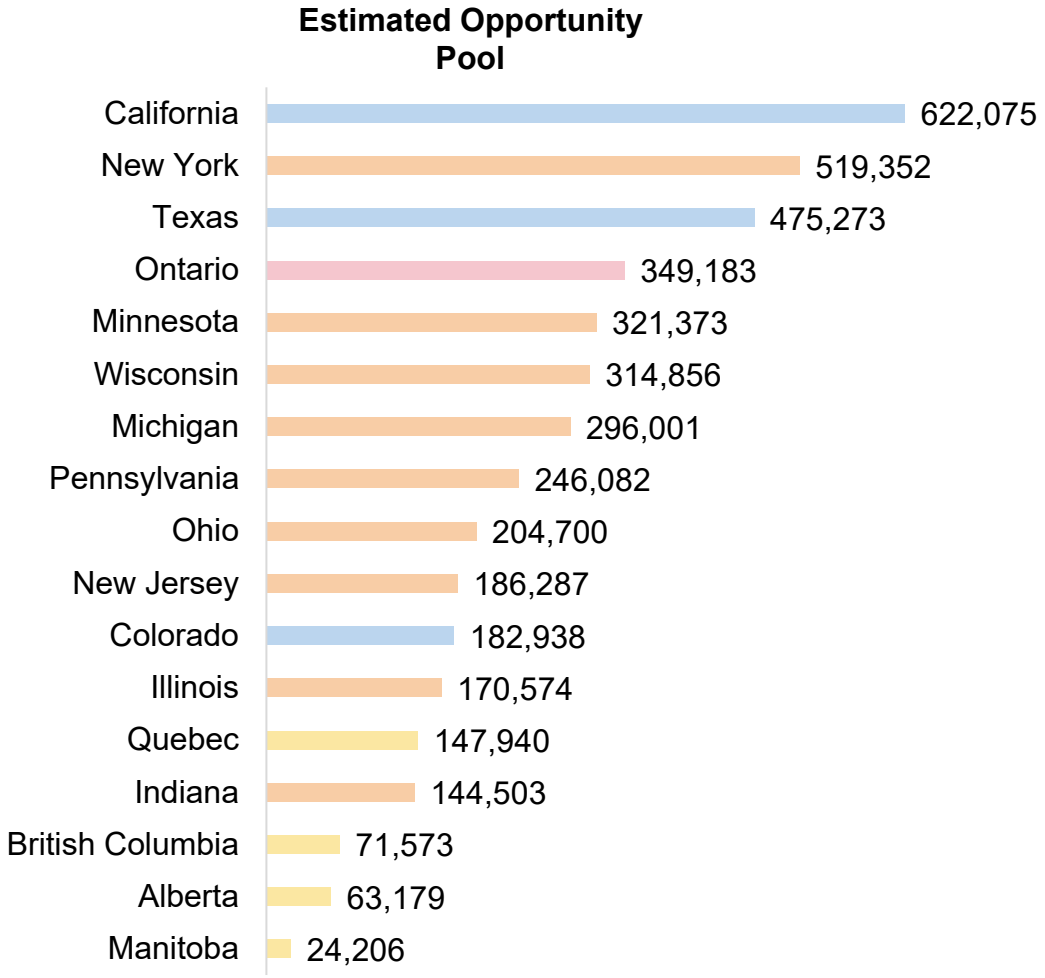
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO
349,183

Rest of Canada
306,899

U.S. Drive
2,403,729

U.S. Fly
1,280,286



Avid anglers aged 30–64 in the surveyed markets who told us they intend to take a fishing trip to Northern Ontario in the next two years.
Not a forecast of visitors. All markets: 4,340,097.

INCREMENTAL VISITOR SPEND: AVID ANGLERS

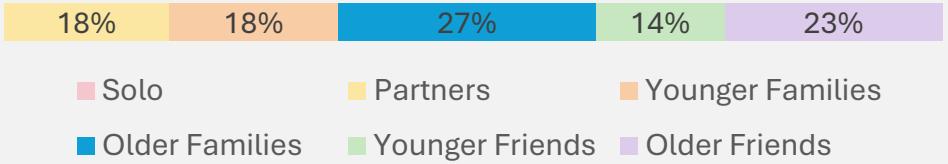
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO **349,183** Opportunity pool	**1,000** additional visitors	×	**$378** spend per visitor	=	**$378K** incremental visitor spend
Rest of Canada **306,899** Opportunity pool	**1,000** additional visitors	×	**$479** spend per visitor	=	**$479K** incremental visitor spend
U.S. Drive **2,403,729** Opportunity pool	**1,000** additional visitors	×	**$857** spend per visitor	=	**$857K** incremental visitor spend
U.S. Fly **1,280,286** Opportunity pool	**1,000** additional visitors	×	**$917** spend per visitor	=	**$917K** incremental visitor spend

Incremental direct visitor spending if 1,000 additional avid anglers from each market take a Northern Ontario trip. Based on average spend per visitor (travel party spend on the most recent Northern Ontario trip ÷ party size) among past-five-year visitors. U.S. spend converted to CAD at 1.37. Direct visitor spending only, not total economic impact.

ONTARIO – FISHING

ESTIMATED OPPORTUNITY POOL: 349,183



HOW THEY TRAVEL

- Ontario anglers are the most frequent visitors (83% have visited, averaging 4.2 trips in five years), but take shorter, lower-spend trips ($1,630) and are the least likely to rate their trip better than elsewhere (60%).
- 83% have fished in Northern Ontario in the past five years (the highest of any market), averaging 4.2 trips.
- Their most recent trip lasted 3.7 nights at $1,630 per party (the lowest of any market), and 56% stayed in paid roofed lodging.
- Private cottages (53%) and AirBnB (48%) are the preferred lodging options.
- Northeast Ontario (54%) and The Great Canadian Wilderness (48%) are the most visited regions, and summer (75%) and spring (55%) the preferred seasons. (See slides 48, 118, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Bonding with friends or family (65%) and connection with nature (61%) are the leading motivations.
- Escape from everyday stress follows (52%).
- Wildlife viewing (51%) and local markets and artisans (50%) are the strongest add-on experiences. (See slides 73–74, 77–78)

WHAT THEY VALUE

- Conservation (87%) and supporting local businesses (83%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (49%) and paying more for a clear conservation benefit (66%) are lower than in the segment.
- 94% agree fishing is part of responsible, sustainable use of natural resources. (See slides 93, 95–96)

WHAT HOLDS THEM BACK

- Cost (43%), wildfires and other disruptions (39%) and poor road, trail or water access (37%) are the leading barriers.
- 58% say financial pressures have affected their travel plans. (See slides 125–127, 131)

WHAT WOULD GROW THEM

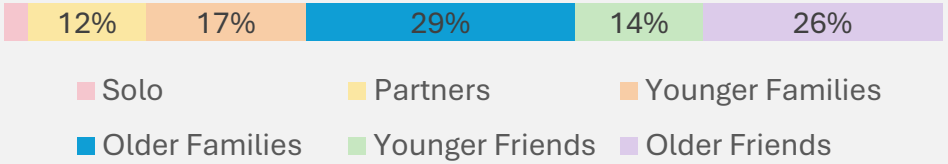
- More for travel companions to do (31%), better value (29%) and quality paid accommodation (26%) would most encourage longer stays.
- 83% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 31 (segment 39). (See slides 103, 109, 120–121)

WHERE TO REACH THEM

- Word of mouth (70%), general search (53%) and booking or review sites (30%) are the leading planning sources.
- Among social media users, YouTube (79%), Facebook (71%) and Instagram (53%) lead.
- 49% are likely to use AI tools to plan their next trip. (See slides 60–62, 66, 71)

REST OF CANADA – FISHING

ESTIMATED OPPORTUNITY POOL: 306,899



HOW THEY TRAVEL

- Rest of Canada anglers are the least engaged market: 56% are likely to visit, their Net Promoter Score is 12, and a quarter (25%) are taking fewer Northern Ontario trips than 10 years ago.
- 46% have fished in Northern Ontario in the past five years, averaging 1.7 trips.
- Their most recent trip lasted 4.6 nights at $1,892 per party (below the segment's $3,342), and 47% stayed in paid roofed lodging.
- Commercial cottages or cabins (45%) and private cottages (43%) are the preferred lodging options.
- Sunset Country (23%) and Superior Country (14%) are the most visited regions, and summer (75%) and fall (42%) the preferred seasons. (See slides 48, 118, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Connection with nature (67%) and escape from everyday stress (63%) are the leading motivations.
- Bonding with friends or family follows (57%).
- Northern Lights viewing (49%) and local markets and artisans (45%) are the strongest add-on experiences. (See slides 73–74, 77–78)

WHAT THEY VALUE

- Minimal environmental impact (90%) and conservation (88%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (54%) and paying more for a clear conservation benefit (60%) are lower than in the segment.
- 87% agree fishing is part of responsible, sustainable use of natural resources (the lowest of any market). (See slides 93, 95–96)

WHAT HOLDS THEM BACK

- Cost (44%), weather or season timing (39%) and transportation costs (36%) are the leading barriers.
- 64% say financial pressures have affected their travel plans. (See slides 125–127, 131)

WHAT WOULD GROW THEM

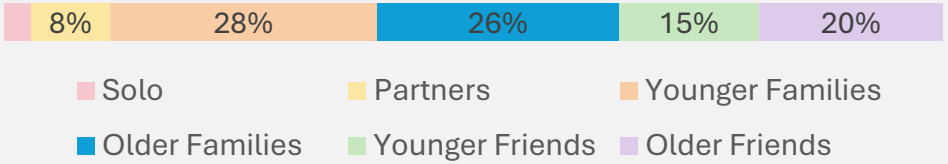
- Better value (29%), more for travel companions to do (28%) and improved access infrastructure (27%) would most encourage longer stays.
- 56% are likely to visit in the next two years (the lowest of any market).
- Among those who know the region, Northern Ontario's NPS is 12, below the segment (39). (See slides 103, 109, 120–121)

WHERE TO REACH THEM

- Word of mouth (64%), general search (52%) and social media content (32%) are the leading planning sources.
- Among social media users, YouTube (78%), Facebook (75%) and Instagram (43%) lead.
- 40% are likely to use AI tools to plan their next trip (the lowest of any market). (See slides 60–62, 66, 71)

U.S. DRIVE – FISHING

ESTIMATED OPPORTUNITY POOL: 2,403,729



HOW THEY TRAVEL

- U.S. Drive anglers are the core high-yield market: the most likely to rate their trip better than elsewhere (85%), with the highest Net Promoter Score (47) and party spend of $3,886.
- 48% have fished in Northern Ontario in the past five years, averaging 1.3 trips.
- Their most recent trip lasted 4.1 nights at $3,886 per party (above the segment's $3,342), and 74% stayed in paid roofed lodging.
- Drive-in lodges or resorts (47%) and hotels or motels (45%) are the preferred lodging options.
- Sunset Country (22%) and Superior Country (21%) are the most visited regions, and summer (77%) and spring (68%) the preferred seasons. (See slides 48, 118, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Escape from everyday stress (67%) and connection with nature (62%) are the leading motivations.
- Bonding with friends or family follows (59%).
- Northern Lights viewing (51%) and scenic driving (49%) are the strongest add-on experiences. (See slides 73–74, 77–78)

WHAT THEY VALUE

- Supporting local businesses (91%) and conservation (89%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (77%) and paying more for a clear conservation benefit (77%) are higher than in the segment.
- 95% agree fishing is part of responsible, sustainable use of natural resources. (See slides 93, 95–96)

WHAT HOLDS THEM BACK

- Cost (32%), weather or season timing (28%) and expensive licensing or permits (27%) are the leading barriers.
- Insects is less of a concern (19% vs. 23%).
- 57% say financial pressures have affected their travel plans. (See slides 125–127, 131)

WHAT WOULD GROW THEM

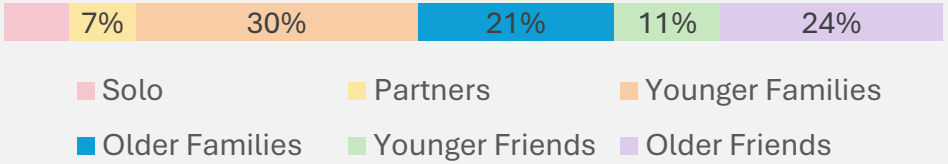
- Better value (43%), more for travel companions to do (41%) and quality paid accommodation (30%) would most encourage longer stays.
- 80% are likely to visit in the next two years (above the segment's 76%).
- Among those who know the region, Northern Ontario's NPS is 47, above the segment (39). (See slides 103, 109, 120–121)

WHERE TO REACH THEM

- Word of mouth (53%), general search (50%) and social media content (40%) are the leading planning sources.
- Among social media users, YouTube (80%), Facebook (71%) and Instagram (54%) lead.
- 64% are likely to use AI tools to plan their next trip (the highest of any market). (See slides 60–62, 66, 71)

U.S. FLY – FISHING

ESTIMATED OPPORTUNITY POOL: 1,280,286



HOW THEY TRAVEL

- U.S. Fly anglers are the most likely to fly fish (45%) and to consider fly-in access (41%), and they spend the most per party ($4,158).
- 46% have fished in Northern Ontario in the past five years, averaging 1.5 trips.
- Their most recent trip lasted 3.8 nights at $4,158 per party, and 80% stayed in paid roofed lodging.
- Hotels or motels (50%) and commercial cottages or cabins (48%) are the preferred lodging options.
- Sunset Country (24%) and Superior Country (20%) are the most visited regions, and summer (75%) and spring (74%) the preferred seasons. (See slides 48, 118, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Connection with nature (59%) and escape from everyday stress (58%) are the leading motivations.
- Experiencing new places follows (57%).
- Northern Lights viewing (55%) and scenic driving (47%) are the strongest add-on experiences. (See slides 73–74, 77–78)

WHAT THEY VALUE

- Minimal environmental impact (90%) and conservation (89%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (74%) and paying more for a clear conservation benefit (73%) compare with 71% and 73% for the segment.
- 93% agree fishing is part of responsible, sustainable use of natural resources. (See slides 93, 95–96)

WHAT HOLDS THEM BACK

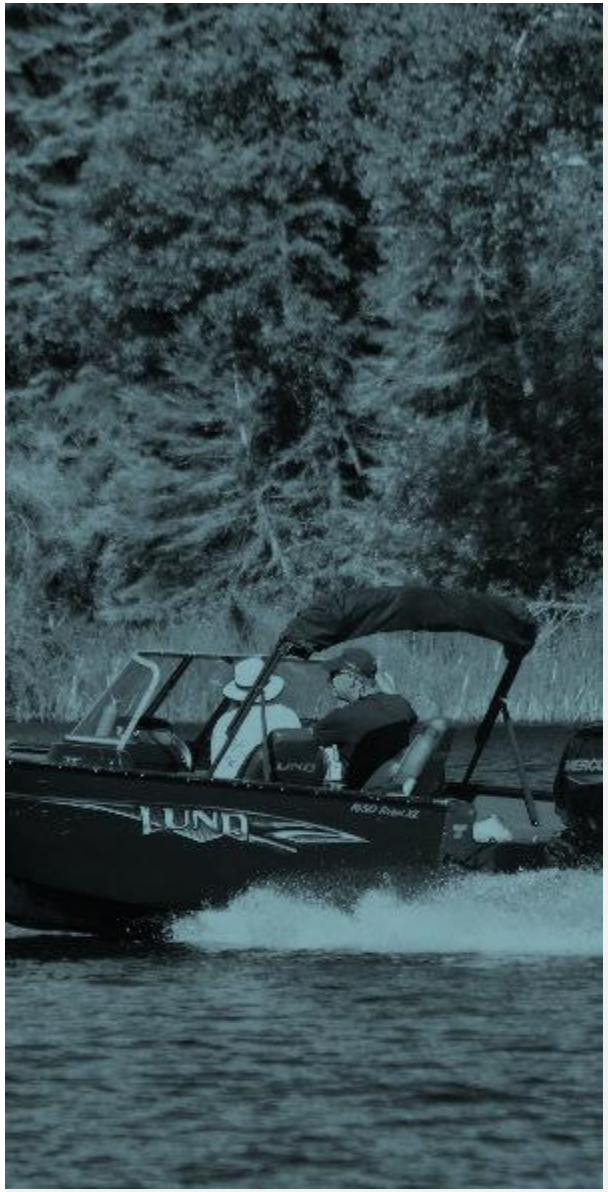
- Cost (34%), insects (26%) and safety concerns (25%) are the leading barriers.
- 46% say financial pressures have affected their travel plans. (See slides 125–127, 131)

WHAT WOULD GROW THEM

- More for travel companions to do (50%), better value (47%) and quality paid accommodation (40%) would most encourage longer stays.
- 70% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 34 (segment 39). (See slides 103, 109, 120–121)

WHERE TO REACH THEM

- General search (52%), word of mouth (50%) and social media content (46%) are the leading planning sources.
- Among social media users, YouTube (85%), Instagram (76%) and Facebook (72%) lead.
- 63% are likely to use AI tools to plan their next trip. (See slides 60–62, 66, 71)



TRAVELLER TYPE SUMMARY

ESTIMATED OPPORTUNITY POOL BY TRAVELLER TYPE: AVID ANGLERS

Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

SOLO
164,854

YOUNGER FAMILIES
1,182,823

YOUNGER FRIENDS
593,140

PARTNERS
393,757

OLDER FAMILIES
1,072,769

OLDER FRIENDS
932,754

Avid anglers aged 30–64 in the surveyed markets who told us they intend to take a fishing trip to Northern Ontario in the next two years, split by the traveller-type mix of survey respondents in each market. Not a forecast of visitors.

PARTNERS – FISHING

ESTIMATED OPPORTUNITY POOL: 393,757

WHO THEY ARE
- Partners are self-reliant anglers: the most likely to fish fully self-guided (78%) and to use their own gear only (65%), and the least motivated by bonding (31%).
- 30% have children under 18 at home, and the largest age group is 55 to 64 (43%).
- 67% have been fishing for more than 10 years, and 32% use local outfitters or operators alongside their own gear (the lowest of any traveller type).
- Trout (67%) and bass (59%) are the most targeted fish. (See slides 37, 39, 54)

HOW THEY TRAVEL
- 49% have fished in Northern Ontario in the past five years, averaging 1.8 trips.
- Their most recent trip lasted 4.3 nights at $2,729 per party, and 70% stayed in paid roofed lodging.
- Drive-in lodges or resorts (46%) and commercial cottages or cabins (43%) are the preferred lodging options.
- Northeast Ontario (24%) and Sunset Country (22%) are the most visited regions, and summer (78%) and spring (58%) the preferred seasons. (See slides 49, 119, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Connection with nature (70%) and wildlife encounters (56%) are the leading motivations.
- Bonding with friends or family matters less than in the segment overall (31% vs. 59%).
- Scenic driving (52%) and Northern Lights viewing (52%) are the strongest add-on experiences. (See slides 75–76, 79–80)

WHAT THEY VALUE
- Supporting local businesses (88%) and conservation (83%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (56%) and paying more for a clear conservation benefit (64%) are lower than in the segment.
- 88% agree fishing is part of responsible, sustainable use of natural resources. (See slides 94, 97–98)

WHAT HOLDS THEM BACK
- Cost (36%), distance (29%) and wildfires and other disruptions (29%) are the leading barriers.
- 51% say financial pressures have affected their travel plans. (See slides 128–131)

WHAT WOULD GROW THEM
- More for travel companions to do (44%), better value (34%) and quality paid accommodation (29%) would most encourage longer stays.
- 69% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 35 (segment 39). (See slides 103, 109, 122–123)

WHERE TO REACH THEM
- General search (53%), word of mouth (49%) and social media content (28%) are the leading planning sources.
- Among social media users, YouTube (83%), Facebook (67%) and TikTok (40%) lead.
- 45% are likely to use AI tools to plan their next trip (the lowest of any traveller type). (See slides 63–65, 67, 71)

YOUNGER FAMILIES – FISHING

ESTIMATED OPPORTUNITY POOL: 1,182,823

WHO THEY ARE
- Younger families are the most engaged anglers: the most likely to have visited (60%) and to visit again (87%), and 34% are taking more Northern Ontario trips than 10 years ago.
- 95% have children under 18 at home, and the largest age group is 35 to 44 (75%).
- 53% have been fishing for more than 10 years (the lowest of any traveller type), and 63% use local outfitters or operators alongside their own gear (the highest of any traveller type).
- Bass (77%) and trout (75%) are the most targeted fish. (See slides 37, 39, 54)

HOW THEY TRAVEL
- 60% have fished in Northern Ontario in the past five years (the highest of any traveller type), averaging 2.0 trips.
- Their most recent trip lasted 4.2 nights at $3,574 per party, and 82% stayed in paid roofed lodging.
- Hotels or motels (49%) and AirBnB (47%) are the preferred lodging options.
- Superior Country (31%) and Sunset Country (29%) are the most visited regions, and summer (83%) and spring (65%) the preferred seasons. (See slides 49, 119, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Bonding with friends or family (67%) and connection with nature (63%) are the leading motivations.
- Sourcing ethically harvested food matters more than in the segment overall (28% vs. 20%).
- Scenic driving (48%) and wildlife viewing (48%) are the strongest add-on experiences. (See slides 75–76, 79–80)

WHAT THEY VALUE
- Supporting local businesses (93%) and conservation (92%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (80%) and paying more for a clear conservation benefit (80%) are higher than in the segment.
- 96% agree fishing is part of responsible, sustainable use of natural resources. (See slides 94, 97–98)

WHAT HOLDS THEM BACK
- Cost (30%), transportation costs (29%) and weather or season timing (27%) are the leading barriers.
- Insects is less of a concern (16% vs. 23%).
- 55% say financial pressures have affected their travel plans. (See slides 128–131)

WHAT WOULD GROW THEM
- Better value (45%), more for travel companions to do (44%) and quality paid accommodation (36%) would most encourage longer stays.
- 87% are likely to visit in the next two years (the highest of any traveller type).
- Among those who know the region, Northern Ontario's NPS is 44 (segment 39). (See slides 103, 109, 122–123)

WHERE TO REACH THEM
- General search (53%), word of mouth (48%) and social media content (47%) are the leading planning sources.
- Influencers play a bigger role than for the segment (27% vs. 17%).
- Among social media users, YouTube (81%), Facebook (78%) and Instagram (66%) lead.
- 74% are likely to use AI tools to plan their next trip (the highest of any traveller type). (See slides 63–65, 67, 71)

OLDER FAMILIES – FISHING

ESTIMATED OPPORTUNITY POOL: 1,072,769

WHO THEY ARE
- Older families are long-time anglers (81% for more than 10 years) who fish for time together, giving one of the highest Net Promoter Scores (47).
- 70% have children under 18 at home, and the largest age group is 45 to 54 (55%).
- 81% have been fishing for more than 10 years (the highest of any traveller type), and 52% use local outfitters or operators alongside their own gear.
- Trout (72%) and bass (69%) are the most targeted fish. (See slides 37, 39, 54)

HOW THEY TRAVEL
- 46% have fished in Northern Ontario in the past five years, averaging 1.6 trips.
- Their most recent trip lasted 4.3 nights at $3,677 per party, and 67% stayed in paid roofed lodging.
- Hotels or motels (44%) and commercial cottages or cabins (41%) are the preferred lodging options.
- Sunset Country (19%) and Northeast Ontario (16%) are the most visited regions, and summer (74%) and spring (62%) the preferred seasons. (See slides 49, 119, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Escape from everyday stress (70%) and bonding with friends or family (64%) are the leading motivations.
- Connection with nature follows (64%).
- Northern Lights viewing (48%) and local markets and artisans (47%) are the strongest add-on experiences. (See slides 75–76, 79–80)

WHAT THEY VALUE
- Supporting local businesses (89%) and conservation (88%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (72%) and paying more for a clear conservation benefit (71%) compare with 71% and 73% for the segment.
- 94% agree fishing is part of responsible, sustainable use of natural resources. (See slides 94, 97–98)

WHAT HOLDS THEM BACK
- Cost (34%), weather or season timing (31%) and expensive licensing or permits (28%) are the leading barriers.
- Campsite availability is less of a concern (7% vs. 14%).
- 64% say financial pressures have affected their travel plans. (See slides 128–131)

WHAT WOULD GROW THEM
- Better value (39%), more for travel companions to do (35%) and better connectivity (27%) would most encourage longer stays.
- 71% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 47 (segment 39). (See slides 103, 109, 122–123)

WHERE TO REACH THEM
- Word of mouth (59%), general search (46%) and social media content (29%) are the leading planning sources.
- Among social media users, Facebook (80%), YouTube (77%) and Instagram (47%) lead.
- 59% are likely to use AI tools to plan their next trip. (See slides 63–65, 67, 71)

YOUNGER FRIENDS – FISHING

ESTIMATED OPPORTUNITY POOL: 593,140

WHO THEY ARE
- Younger friend groups are newer anglers (55% fishing for more than 10 years) who are the most open to remote boat-in access (60%) and the most likely to target muskellunge (17%).
- 55% have children under 18 at home, and the largest age group is 35 to 44 (62%).
- 55% have been fishing for more than 10 years (below the segment's 68%), and 55% use local outfitters or operators alongside their own gear.
- Bass (69%) and trout (68%) are the most targeted fish. (See slides 37, 39, 54)

HOW THEY TRAVEL
- 52% have fished in Northern Ontario in the past five years, averaging 1.6 trips.
- Their most recent trip lasted 3.7 nights at $2,809 per party, and 63% stayed in paid roofed lodging.
- AirBnB (47%) and drive-in lodges or resorts (43%) are the preferred lodging options.
- Sunset Country (23%) and Superior Country (23%) are the most visited regions, and summer (77%) and spring (61%) the preferred seasons. (See slides 49, 119, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Escape from everyday stress (65%) and bonding with friends or family (58%) are the leading motivations.
- Connection with nature matters less than in the segment overall (50% vs. 63%).
- Northern Lights viewing (49%) and wildlife viewing (46%) are the strongest add-on experiences. (See slides 75–76, 79–80)

WHAT THEY VALUE
- Conservation (90%) and supporting local businesses (87%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (70%) and paying more for a clear conservation benefit (75%) compare with 71% and 73% for the segment.
- 93% agree fishing is part of responsible, sustainable use of natural resources. (See slides 94, 97–98)

WHAT HOLDS THEM BACK
- Cost (34%), distance (26%) and safety concerns (24%) are the leading barriers.
- Expensive licensing or permits is less of a concern (15% vs. 27%).
- 58% say financial pressures have affected their travel plans. (See slides 128–131)

WHAT WOULD GROW THEM
- More for travel companions to do (42%), quality paid accommodation (42%) and better value (36%) would most encourage longer stays.
- 82% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 38 (segment 39). (See slides 103, 109, 122–123)

WHERE TO REACH THEM
- Word of mouth (58%), general search (48%) and social media content (45%) are the leading planning sources.
- Among social media users, YouTube (78%), Instagram (60%) and Facebook (56%) lead.
- 65% are likely to use AI tools to plan their next trip. (See slides 63–65, 67, 71)

OLDER FRIENDS – FISHING

ESTIMATED OPPORTUNITY POOL: 932,754

WHO THEY ARE
- Older friend groups are experienced anglers (81% for more than 10 years) but the least engaged: their Net Promoter Score is the lowest (27), and only 15% are taking more Northern Ontario trips than 10 years ago.
- 26% have children under 18 at home, and the largest age group is 45 to 54 (52%).
- 81% have been fishing for more than 10 years (above the segment's 68%), and 57% use local outfitters or operators alongside their own gear.
- Bass (76%) and trout (67%) are the most targeted fish. (See slides 37, 39, 54)

HOW THEY TRAVEL
- 46% have fished in Northern Ontario in the past five years, averaging 1.4 trips.
- Their most recent trip lasted 3.8 nights at $3,601 per party, and 51% stayed in paid roofed lodging.
- Commercial cottages or cabins (49%) and designated campgrounds (48%) are the preferred lodging options.
- Sunset Country (19%) and Algoma Country (17%) are the most visited regions, and summer (69%) and spring (66%) the preferred seasons. (See slides 49, 119, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

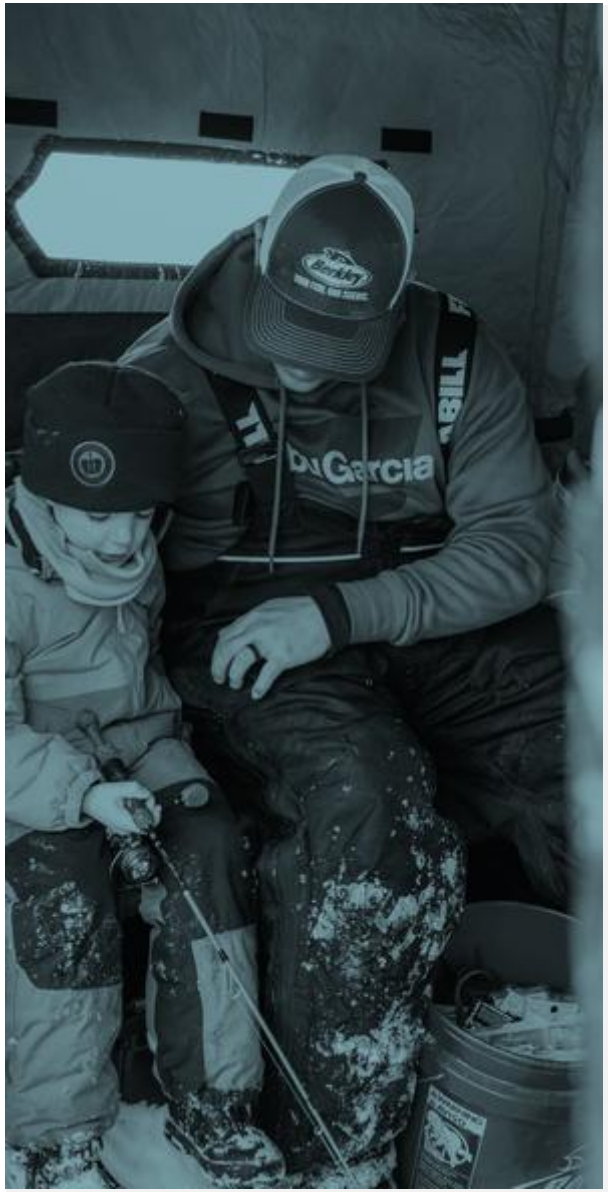
WHAT MOTIVATES THEM
- Escape from everyday stress (69%) and connection with nature (68%) are the leading motivations.
- Catching or harvesting the target species matters more than in the segment overall (37% vs. 27%).
- Northern Lights viewing (58%) and local markets and artisans (55%) are the strongest add-on experiences. (See slides 75–76, 79–80)

WHAT THEY VALUE
- Supporting local businesses (92%) and minimal environmental impact (89%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (68%) and paying more for a clear conservation benefit (70%) compare with 71% and 73% for the segment.
- 93% agree fishing is part of responsible, sustainable use of natural resources. (See slides 94, 97–98)

WHAT HOLDS THEM BACK
- Cost (42%), weather or season timing (41%) and expensive licensing or permits (35%) are the leading barriers.
- 53% say financial pressures have affected their travel plans. (See slides 128–131)

WHAT WOULD GROW THEM
- Better value (34%), more for travel companions to do (34%) and improved access infrastructure (27%) would most encourage longer stays.
- 72% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 27 (segment 39). (See slides 103, 109, 122–123)

WHERE TO REACH THEM
- Word of mouth (65%), general search (57%) and social media content (43%) are the leading planning sources.
- Among social media users, YouTube (86%), Facebook (70%) and Instagram (47%) lead.
- 47% are likely to use AI tools to plan their next trip (below the segment's 59%). (See slides 63–65, 67, 71)



TRAVELLER & AVIDITY

YEARS FISHING – MARKET

All anglers

More than two-thirds of anglers (68%) have been fishing for more than 10 years, 17% for 6 to 10 years and 12% for 2 to 5 years. Only 3% have been fishing for less than 2 years.

None of the market differences are significant.

Years fishing	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Less than 2 years	3%	4%	5%	2%	3%
2 to 5 years	12%	18%	10%	12%	15%
6 to 10 years	17%	13%	15%	18%	16%
More than 10 years	68%	65%	71%	68%	67%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). A1 How many years have you been participating in fishing as a hobby or recreational pursuit?

YEARS FISHING – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Older families and older friend groups are more likely than other traveller types to have been fishing for more than 10 years (81% each), and younger families (53%) and younger friend groups (55%) less likely.

Younger families are more likely to have been fishing for 6 to 10 years (29%), and younger friend groups for 2 to 5 years (20%).

Years fishing	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Less than 2 years	3%	5%	2%	2%	3%	4%
2 to 5 years	12%	18%	16%	8%	20% ▲	4% ▼
6 to 10 years	17%	10%	29% ▲	9% ▼	21%	12%
More than 10 years	68%	67%	53% ▼	81% ▲	55% ▼	81% ▲

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). A1 How many years have you been participating in fishing as a hobby or recreational pursuit?

FISH SPECIES TARGETED ON FISHING TRIPS – MARKET

All anglers

Bass (72%) and trout (70%) are the most commonly targeted fish, followed by walleye (47%), panfish (44%), northern pike (38%) and salmon (37%).

U.S. Drive anglers are more likely than other markets to target bass (79%) and panfish (55%), while Rest of Canada anglers are less likely to target them (37% and 11%) and U.S. Fly anglers less likely to target walleye (19%).

Fish type	Overall (n=1,061)	Ontario (n=85)	Rest of Canada (n=161)	U.S. Drive (n=695)	U.S. Fly (n=120)
Bass (largemouth or smallmouth)	72%	71%	37% ▼	79% ▲	78%
Trout (lake, brook, rainbow)	70%	72%	67%	69%	74%
Walleye	47%	51%	54%	50%	19% ▼
Panfish (perch, crappie, bluegill)	44%	30%	11% ▼	55% ▲	37%
Northern pike	38%	38%	47%	38%	26%
Salmon	37%	45%	27%	36%	47%
Muskellunge	10%	11%	7%	10%	13%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,061). A6A Which of the following fish types do you typically target on a fishing trip? Please select all that apply.

"Not sure" (1%) not shown.

FISH SPECIES TARGETED ON FISHING TRIPS – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families (50%) and younger friend groups (49%) are more likely than other traveller types to target salmon, and older families less likely (27%).

Younger friend groups are also more likely to target muskellunge (17%).

Fish type	Overall (n=1,061)	Partners (n=100)	Younger Families (n=273)	Older Families (n=272)	Younger Friends (n=148)	Older Friends (n=224)
Bass (largemouth or smallmouth)	72%	59%	77%	69%	69%	76%
Trout (lake, brook, rainbow)	70%	67%	75%	72%	68%	67%
Walleye	47%	52%	46%	52%	41%	47%
Panfish (perch, crappie, bluegill)	44%	45%	48%	43%	47%	36%
Northern pike	38%	33%	35%	39%	41%	40%
Salmon	37%	28%	50% ▲	27% ▼	49% ▲	30%
Muskellunge	10%	15%	10%	7%	17% ▲	6%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,061). A6A Which of the following fish types do you typically target on a fishing trip? Please select all that apply.

"Not sure" (1%) not shown.

PREFERRED STYLE OF FISHING – MARKET

All anglers

Nearly all anglers prefer gear or lure fishing (94%), while a third also fly fish (33%) and a quarter ice fish (25%).

U.S. Fly anglers are more likely than other markets to fly fish (45%), and Ontario anglers less likely (13%). U.S. Drive anglers are more likely to prefer gear or lure fishing (96%), and Rest of Canada anglers less likely (90%).

Style	Overall (n=1,062)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=694)	U.S. Fly (n=120)
Gear / lure fishing	94%	91%	90% ▼	96% ▲	94%
Fly fishing	33%	13% ▼	25%	35%	45% ▲
Ice fishing	25%	20%	29%	25%	22%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,062). A7 Which of the following best describes your preferred style of fishing? Please select all that apply.

"Not sure" (<1%) not shown.

PREFERRED STYLE OF FISHING – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to fly fish (42%) and ice fish (31%).

Gear or lure fishing is preferred by 92% to 96% of every traveller type.

Style	Overall (n=1,062)	Partners (n=100)	Younger Families (n=274)	Older Families (n=271)	Younger Friends (n=149)	Older Friends (n=223)
Gear / lure fishing	94%	92%	94%	96%	93%	95%
Fly fishing	33%	29%	42% ▲	28%	36%	27%
Ice fishing	25%	22%	31% ▲	23%	29%	21%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,062). A7 Which of the following best describes your preferred style of fishing? Please select all that apply.

"Not sure" (<1%) not shown.

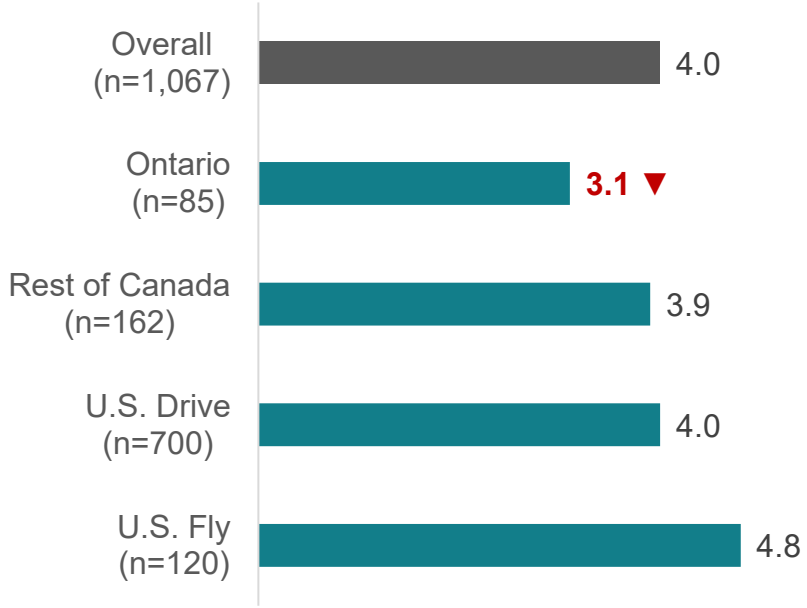
FISHING TRIPS PER YEAR

All anglers | Traveller types are defined on slide 10

Anglers take an average of 4.0 overnight trips per year where fishing is the primary purpose.

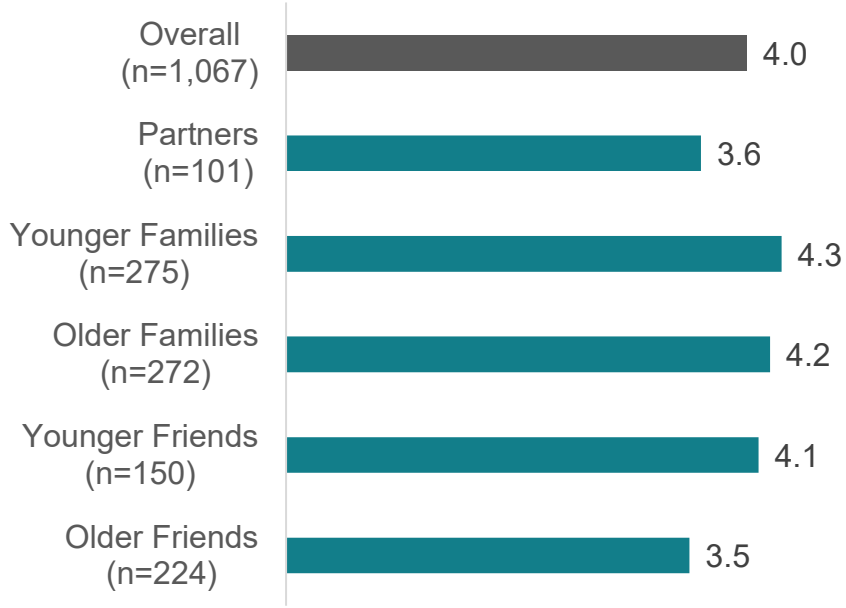
Ontario anglers take fewer trips than other markets (3.1). Among traveller types, averages range from 3.5 trips among older friend groups to 4.3 among younger families.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). A3 Approximately how many overnight trips per year do you take where fishing is the primary purpose? AVG = average number of overnight trips per year.

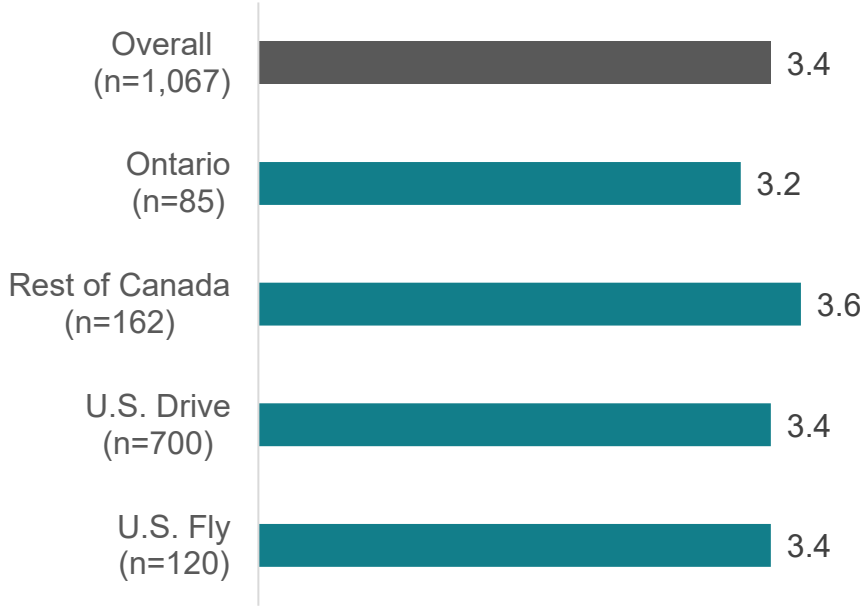
NIGHTS PER FISHING TRIP

All anglers | Traveller types are defined on slide 10

Fishing trips last an average of 3.4 nights.

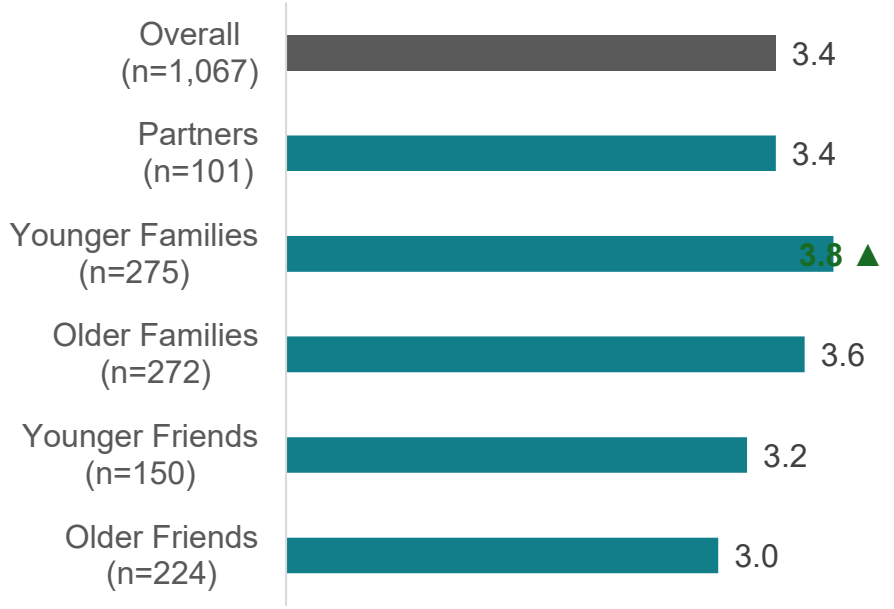
Younger families take longer trips than other traveller types (3.8 nights). Among markets, trip length ranges from 3.2 nights among Ontario anglers to 3.6 among Rest of Canada anglers.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). A4 How many nights do you typically spend on a fishing trip? AVG = average number of nights.

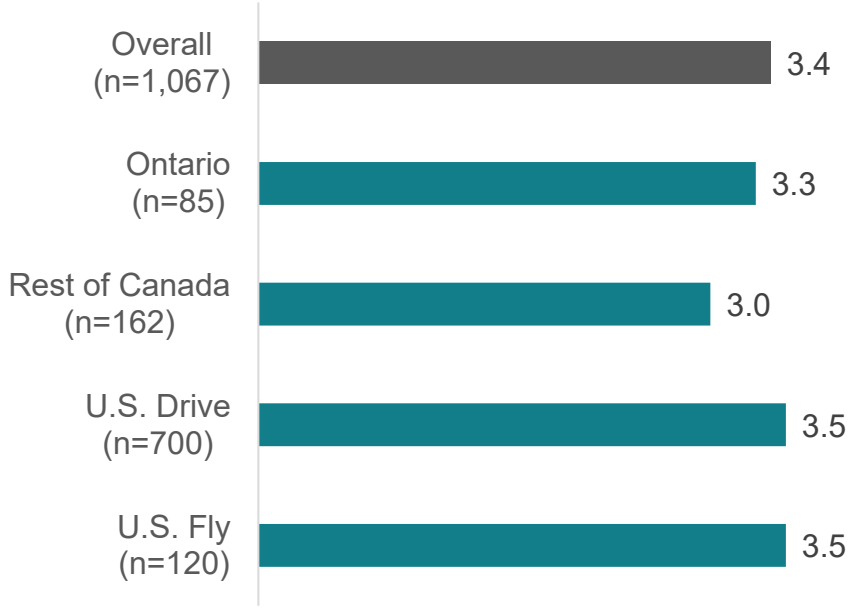
NUMBER OF PEOPLE TRAVELLED WITH ON FISHING TRIPS

All anglers | Traveller types are defined on slide 10

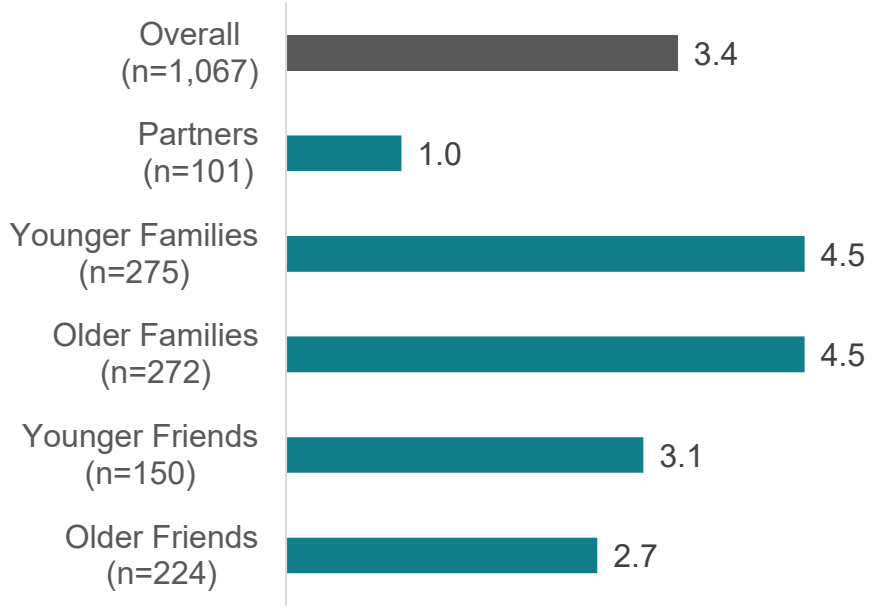
Anglers typically travel with an average of 3.4 people on a fishing trip.

Families travel in the largest groups (4.5 people each for younger and older families), while partners travel with 1.0 person on average. Among markets, group size ranges from 3.0 among Rest of Canada anglers to 3.5 among U.S. Drive and U.S. Fly anglers.

MARKET



TRAVELLER TYPE



Base: all anglers (n=1,067). A5 How many people do you typically travel with on a fishing trip? AVG = sum of the average number of people reported for each category (partner or spouse, friends, children, other). Significance testing is not available for the combined average.

FIRST EXPOSURE TO FISHING – MARKET

All anglers

Most anglers got their first exposure to fishing through a family member (78%), and 15% through friends or peers.

Ontario anglers are the most likely to have been introduced by friends or peers (26%), although market differences are not significant.

First exposure	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
A family member	78%	71%	77%	78%	82%
School, camp, or organized program	2%	2%	2%	3%	1%
Friends or peers	15%	26%	13%	14%	15%
I discovered it on my own	4%	0%	8%	4%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). A8 Where did you get your first exposure to fishing?
"Not sure" (<1%) not shown.

FIRST EXPOSURE TO FISHING – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

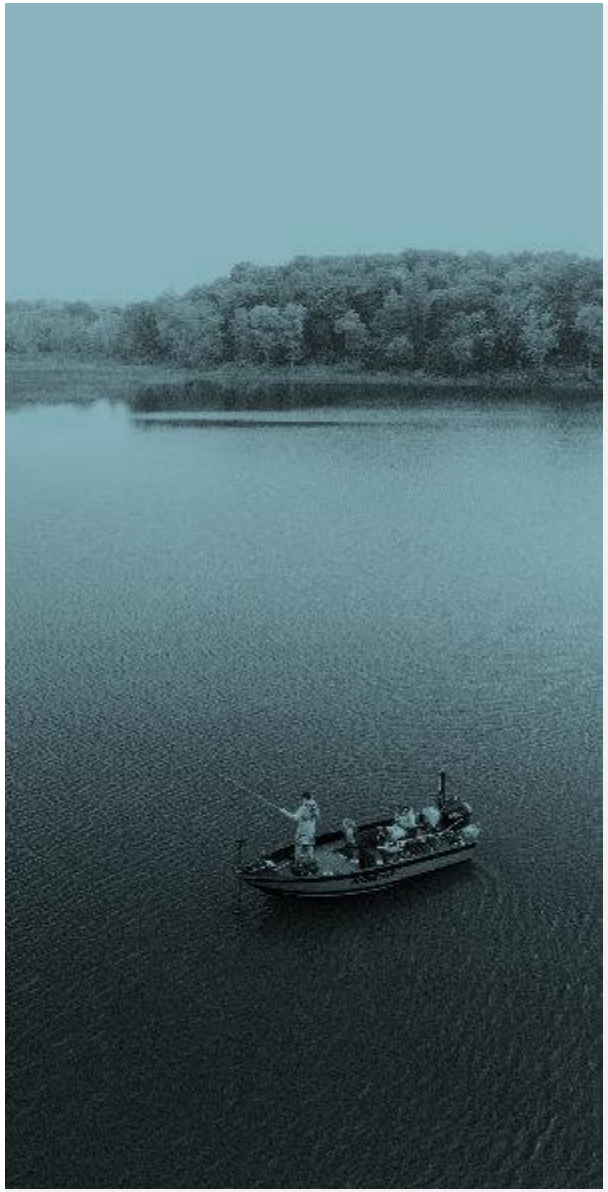
Older families are less likely than other traveller types to have been introduced by friends or peers (8%), and younger friend groups more likely (22%).

A family member is the most common first exposure for every traveller type, from 70% among younger friend groups to 83% among older families.

First exposure	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
A family member	78%	74%	78%	83%	70%	77%
School, camp, or organized program	2%	1%	3%	3%	3%	2%
Friends or peers	15%	19%	15%	8% ▼	22% ▲	20%
I discovered it on my own	4%	6%	4%	6%	4%	1%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). A8 Where did you get your first exposure to fishing?
"Not sure" (<1%) not shown.



HOW THEY TRAVEL

PREFERRED SEASON FOR FISHING – MARKET

All anglers

Summer is the preferred fishing season for three-quarters of anglers (76%), followed by spring (63%) and fall (50%), while 16% prefer winter.

U.S. Drive anglers are more likely than other markets to prefer spring (68%), and Rest of Canada anglers less likely (37%).

Season	Overall (n=1,065)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=698)	U.S. Fly (n=120)
Winter (December – February)	16%	20%	16%	16%	15%
Spring (March – May)	63%	55%	37% ▼	68% ▲	74%
Summer (June – August)	76%	75%	75%	77%	75%
Fall (September – November)	50%	46%	42%	51%	57%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,065). T1 What is your preferred season for taking a fishing trip? Please select all that apply. "Not sure" (<1%) not shown.

PREFERRED SEASON FOR FISHING – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer summer (83%).

Spring appeals to 58% to 66% of every traveller type.

Season	Overall (n=1,065)	Partners (n=101)	Younger Families (n=274)	Older Families (n=272)	Younger Friends (n=149)	Older Friends (n=224)
Winter (December – February)	16%	17%	21%	15%	18%	11%
Spring (March – May)	63%	58%	65%	62%	61%	66%
Summer (June – August)	76%	78%	83% ▲	74%	77%	69%
Fall (September – November)	50%	51%	50%	51%	50%	51%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,065). T1 What is your preferred season for taking a fishing trip? Please select all that apply. "Not sure" (<1%) not shown.

HOW ANGLERS GET TO THEIR DESTINATIONS – MARKET

All anglers

Most anglers get to their destinations by personal vehicle (83%), and 45% with a trailer. A fifth fly to a regional hub and then drive (21%), 12% use an RV or motorhome and 9% a float plane or charter flight.

None of the market differences are significant.

Mode of travel	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Personal vehicle (car, truck, SUV)	83%	78%	82%	83%	89%
Personal vehicle with trailer (e.g., boat, camper, ATV)	45%	42%	36%	46%	49%
Fly to a regional hub, then drive	21%	11%	12%	23%	23%
RV / motorhome	12%	9%	15%	12%	15%
Float plane or charter flight to a remote destination	9%	7%	6%	10%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). T3 How do you typically get to your fishing destinations? Please select all that apply. "Not sure" (0%) not shown.

HOW ANGLERS GET TO THEIR DESTINATIONS – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to fly to a regional hub and then drive (30%) or to use a float plane or charter flight (13%).

Personal vehicle use ranges from 73% among partners to 86% among younger families.

Mode of travel	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Personal vehicle (car, truck, SUV)	83%	73%	86%	81%	85%	85%
Personal vehicle with trailer (e.g., boat, camper, ATV)	45%	44%	50%	44%	44%	42%
Fly to a regional hub, then drive	21%	18%	30% ▲	16%	23%	15%
RV / motorhome	12%	6%	16%	14%	10%	11%
Float plane or charter flight to a remote destination	9%	7%	13% ▲	7%	10%	8%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). T3 How do you typically get to your fishing destinations? Please select all that apply. "Not sure" (0%) not shown.

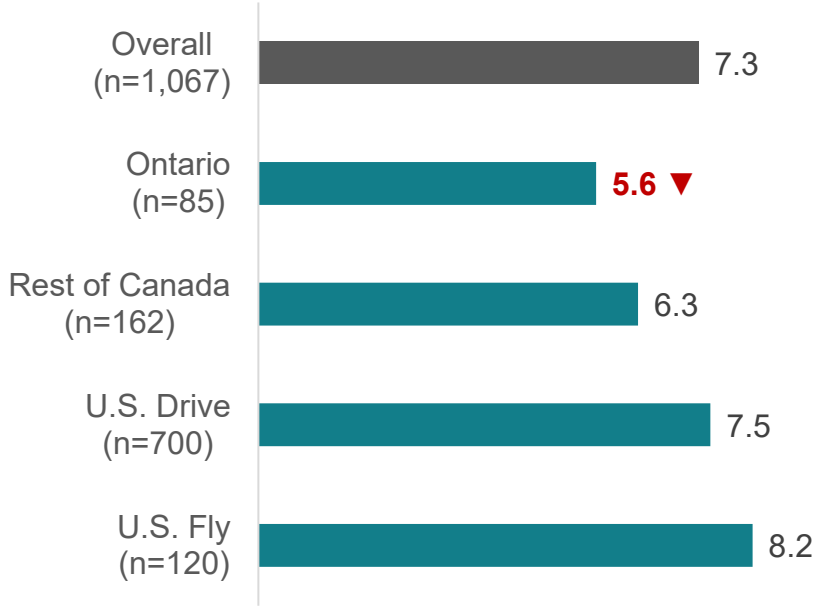
HOURS WILLING TO TRAVEL FOR A FISHING TRIP

All anglers | Traveller types are defined on slide 10

Anglers are willing to travel an average of 7.3 hours one way for a fishing trip.

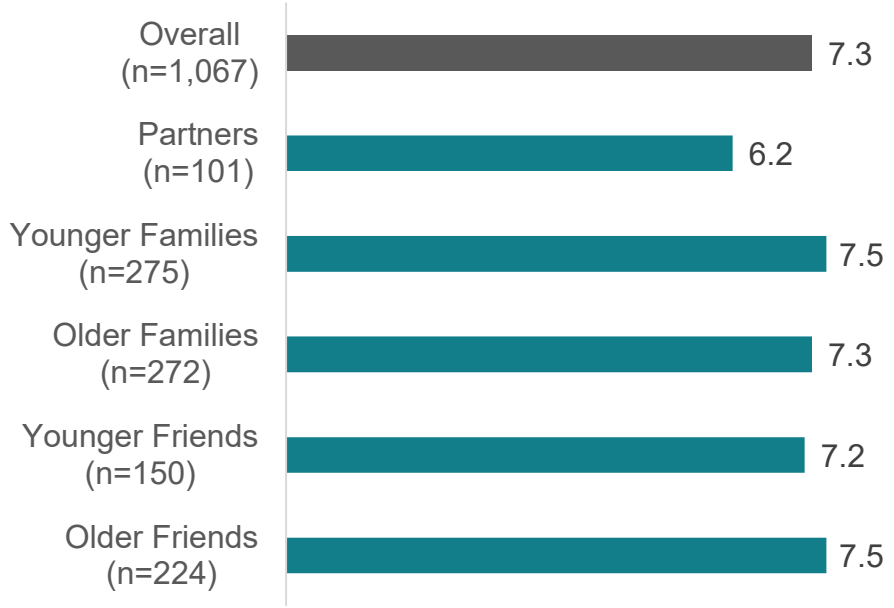
Ontario anglers are willing to travel fewer hours than other markets (5.6), and U.S. Fly anglers the most (8.2). Among traveller types, travel time ranges from 6.2 hours among partners to 7.5 among younger families and older friend groups.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). T4 Approximately how many hours are you willing to travel (one way) for a fishing trip? AVG = average number of hours.

APPROACH TO GEAR AND OUTFITTER USE – MARKET

All anglers

More than half of anglers (55%) have their own gear but also use local outfitters or operators for additional supplies or services, while 43% use their own gear only. Only 2% rely on outfitters, lodges or operators for most of their needs.

None of the market differences are significant.

Approach	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
I have my own gear and do not use local outfitters or operators for supplies or services	43%	48%	52%	41%	41%
I have my own gear but also use local outfitters or operators for additional supplies or services	55%	47%	46%	57%	56%
I rely on outfitters, lodges, or operators for most knowledge, supplies, and services	2%	2%	1%	1%	2%

Note: Respondents may read "outfitter" differently (e.g., a guide or lodge operator vs. an equipment store).

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). T5 Which of the following best describes your approach to fishing gear and outfitter use on overnight trips?

"Not sure" (<1%) not shown.

APPROACH TO GEAR AND OUTFITTER USE – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to also use local outfitters or operators (63%), while partners are more likely to rely on their own gear only (65%).

Approach	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
I have my own gear and do not use local outfitters or operators for supplies or services	43%	65% ▲	35% ▼	48%	42%	42%
I have my own gear but also use local outfitters or operators for additional supplies or services	55%	32% ▼	63% ▲	52%	55%	57%
I rely on outfitters, lodges, or operators for most knowledge, supplies, and services	2%	3%	2%	0%	2%	0%

Note: Respondents may read "outfitter" differently (e.g., a guide or lodge operator vs. an equipment store).

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). T5 Which of the following best describes your approach to fishing gear and outfitter use on overnight trips?

"Not sure" (<1%) not shown.

INDEPENDENT VS. GUIDED FISHING – MARKET

All anglers

Two-thirds of anglers (65%) mainly go fully self-guided, and a third (33%) use a mix of guided and self-guided experiences. Only 2% mainly use guided or outfitted experiences.

None of the market differences are significant.

Approach	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
I mainly go on my own or with my own group – fully self-guided	65%	70%	69%	64%	64%
I use a mix of guided and self-guided	33%	29%	27%	35%	33%
I mainly use guided or outfitted experiences provided by operators	2%	1%	3%	1%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). T6 When you go on a fishing trip, do you mainly go independently or use guided/outfitted experiences?

"Not sure" (<1%) not shown.

INDEPENDENT VS. GUIDED FISHING – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

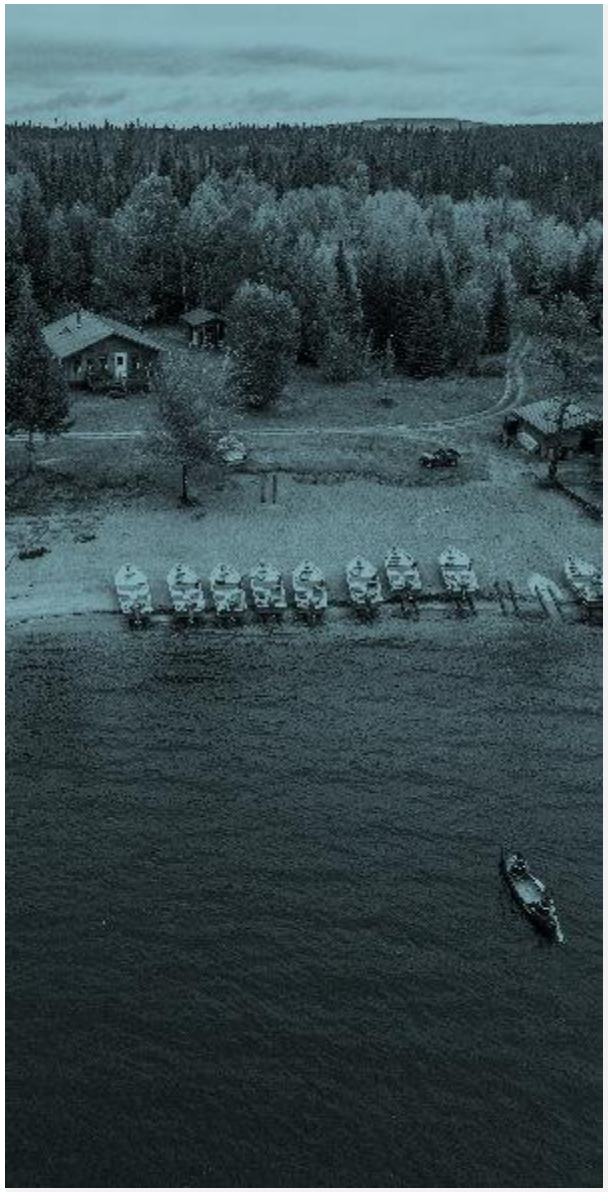
Younger families (43%) and younger friend groups (41%) are more likely than other traveller types to mix guided and self-guided fishing, while partners (78%) and older friend groups (75%) are more likely to go fully self-guided.

Approach	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
I mainly go on my own or with my own group – fully self-guided	65%	78% ▲	55% ▼	69%	57% ▼	75% ▲
I use a mix of guided and self-guided	33%	19% ▼	43% ▲	30%	41% ▲	23% ▼
I mainly use guided or outfitted experiences provided by operators	2%	3%	2%	1%	1%	2%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). T6 When you go on a fishing trip, do you mainly go independently or use guided/outfitted experiences?

"Not sure" (<1%) not shown.



PLANNING & BOOKING

PLANNING LEAD TIME FOR FISHING TRIPS – MARKET

All anglers

Four in ten anglers (42%) start planning one to three months in advance and a third (32%) three to six months ahead, while 14% plan six to twelve months ahead.

None of the market differences are significant.

Lead time	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Less than 1 month	10%	14%	14%	8%	12%
1 to 3 months	42%	44%	38%	42%	41%
3 to 6 months	32%	31%	28%	33%	31%
6 to 12 months	14%	11%	15%	13%	14%
More than 12 months in advance	2%	0%	3%	2%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). B1 How far in advance do you typically start planning a fishing trip? "Not sure" (1%) not shown.

PLANNING LEAD TIME FOR FISHING TRIPS – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Planning one to three months ahead ranges from 37% among partners to 46% among younger families.

None of the traveller type differences are significant.

Lead time	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Less than 1 month	10%	12%	9%	11%	12%	8%
1 to 3 months	42%	37%	46%	39%	44%	41%
3 to 6 months	32%	30%	30%	33%	29%	33%
6 to 12 months	14%	13%	12%	15%	11%	15%
More than 12 months in advance	2%	3%	3%	2%	2%	2%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). B1 How far in advance do you typically start planning a fishing trip? "Not sure" (1%) not shown.

SOURCES OF INSPIRATION AND PLANNING – MARKET (1 OF 3)

All anglers

Word of mouth (56%) and general internet search (51%) are the most common sources of inspiration and planning, followed by social media content (38%), online travel booking or review sites (32%), official tourism websites (30%) and TV shows or documentaries (25%).

None of the market differences are significant.

Source	Overall (n=1,046)	Ontario (n=84)	Rest of Canada (n=156)	U.S. Drive (n=686)	U.S. Fly (n=119)
Word of mouth (e.g., friends or family)	56%	70%	64%	53%	50%
General internet search (e.g., Google, Bing)	51%	53%	52%	50%	52%
Social media content (e.g., Instagram, Facebook, YouTube)	38%	29%	32%	40%	46%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	30%	21%	33%	42%
Official tourism websites (e.g., national, provincial, state, regional, city)	30%	24%	28%	30%	34%
TV shows or documentaries	25%	26%	19%	26%	29%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,046). B4 Which of the following do you use to find inspiration or plan your fishing trips? Please select all that apply.

"Not sure" (2%) not shown.

SOURCES OF INSPIRATION AND PLANNING – MARKET (2 OF 3)

All anglers

About a quarter of anglers use outdoor or sporting magazines (24%), AI tools (23%), visitor centres (23%) or outfitter or lodge websites (23%), and about a fifth use articles, blogs or videos (22%), travel guides (21%) or forums (18%).

None of the market differences are significant.

Source	Overall (n=1,046)	Ontario (n=84)	Rest of Canada (n=156)	U.S. Drive (n=686)	U.S. Fly (n=119)
Outdoor or sporting magazines or publications	24%	15%	17%	26%	29%
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	17%	14%	25%	31%
Travel information centres or visitor centres	23%	17%	23%	24%	23%
Outfitter or lodge websites	23%	14%	25%	23%	25%
Articles, blogs, or videos about travel destinations	22%	14%	16%	23%	27%
Magazines, travel guides or brochures	21%	15%	14%	23%	23%
Forums or online communities	18%	18%	15%	18%	25%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,046). B4 Which of the following do you use to find inspiration or plan your fishing trips? Please select all that apply.

"Not sure" (2%) not shown.

SOURCES OF INSPIRATION AND PLANNING – MARKET (3 OF 3)

All anglers

Each of the remaining sources is used by fewer than a fifth of anglers, led by social media influencers (17%).

None of the market differences are significant.

Source	Overall (n=1,046)	Ontario (n=84)	Rest of Canada (n=156)	U.S. Drive (n=686)	U.S. Fly (n=119)
Social media influencers	17%	13%	10%	19%	24%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	11%	9%	8%	11%	19%
Consumer shows/exhibitions	10%	6%	12%	10%	10%
Travel-related phone lines or hotlines	8%	6%	6%	8%	11%
Travel agents	8%	5%	7%	8%	9%
Email newsletters	6%	6%	11%	5%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,046). B4 Which of the following do you use to find inspiration or plan your fishing trips? Please select all that apply.

“Not sure” (2%) not shown.

SOURCES OF INSPIRATION AND PLANNING – TRAVELLER TYPE (1 OF 3)

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use social media content (47%) and online booking or review sites (41%), and less likely to rely on word of mouth (48%), while older families are less likely to use social media content (29%).

Source	Overall (n=1,046)	Partners (n=99)	Younger Families (n=270)	Older Families (n=266)	Younger Friends (n=144)	Older Friends (n=223)
Word of mouth (e.g., friends or family)	56%	49%	48% ▼	59%	58%	65%
General internet search (e.g., Google, Bing)	51%	53%	53%	46%	48%	57%
Social media content (e.g., Instagram, Facebook, YouTube)	38%	28%	47% ▲	29% ▼	45%	43%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	25%	41% ▲	28%	31%	31%
Official tourism websites (e.g., national, provincial, state, regional, city)	30%	25%	34%	25%	23%	34%
TV shows or documentaries	25%	28%	25%	21%	25%	29%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,046). B4 Which of the following do you use to find inspiration or plan your fishing trips? Please select all that apply.

"Not sure" (2%) not shown.

SOURCES OF INSPIRATION AND PLANNING – TRAVELLER TYPE (2 OF 3)

All anglers | Traveller types are defined on slide 10

Use of AI tools ranges from 20% among partners to 29% among younger friend groups, and visitor centres from 18% among partners to 31% among older friend groups.

None of the traveller type differences are significant.

Source	Overall (n=1,046)	Partners (n=99)	Younger Families (n=270)	Older Families (n=266)	Younger Friends (n=144)	Older Friends (n=223)
Outdoor or sporting magazines or publications	24%	20%	27%	24%	21%	25%
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	20%	27%	21%	29%	22%
Travel information centres or visitor centres	23%	18%	24%	20%	19%	31%
Outfitter or lodge websites	23%	15%	25%	24%	16%	26%
Articles, blogs, or videos about travel destinations	22%	21%	27%	18%	23%	22%
Magazines, travel guides or brochures	21%	20%	19%	21%	15%	24%
Forums or online communities	18%	11%	23%	15%	21%	20%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,046). B4 Which of the following do you use to find inspiration or plan your fishing trips? Please select all that apply.

“Not sure” (2%) not shown.

SOURCES OF INSPIRATION AND PLANNING – TRAVELLER TYPE (3 OF 3)

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use social media influencers (27%).

Each remaining source is used by 16% or fewer in every traveller type.

Source	Overall (n=1,046)	Partners (n=99)	Younger Families (n=270)	Older Families (n=266)	Younger Friends (n=144)	Older Friends (n=223)
Social media influencers	17%	9%	27% ▲	13%	24%	11%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	11%	8%	15%	6%	10%	12%
Consumer shows/exhibitions	10%	16%	10%	7%	10%	13%
Travel-related phone lines or hotlines	8%	4%	11%	8%	6%	6%
Travel agents	8%	5%	12%	7%	7%	6%
Email newsletters	6%	6%	8%	4%	7%	8%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,046). B4 Which of the following do you use to find inspiration or plan your fishing trips? Please select all that apply.

"Not sure" (2%) not shown.

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – MARKET

Anglers who use social media to plan

YouTube (80%) and Facebook (72%) are the most used social media platforms for fishing information, followed by Instagram (55%) and TikTok (44%).

U.S. Fly anglers are more likely than other markets to use Instagram (76%).

Platform	Overall (n=477)	Ontario (n=32)	Rest of Canada (n=57)	U.S. Drive (n=325)	U.S. Fly (n=64)
YouTube	80%	79%	78%	80%	85%
Facebook	72%	71%	75%	71%	72%
Instagram	55%	53%	43%	54%	76% ▲
TikTok	44%	32%	33%	45%	57%
Reddit	33%	29%	19%	35%	36%
X (formerly known as Twitter)	33%	16%	20%	35%	39%
Pinterest	18%	17%	17%	16%	27%
WhatsApp	17%	19%	11%	17%	22%
Snapchat	15%	12%	7%	15%	26%
Threads	7%	2%	0%	8%	11%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who use social media to plan (B4) (n=477). B4B Which social media platforms do you use to obtain information about your fishing trips? Please select all that apply.

"Not sure" (<1%) not shown.

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – TRAVELLER TYPE

Anglers who use social media to plan | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use Instagram (66%), TikTok (56%), Snapchat (22%) and Threads (12%), while younger friend groups are less likely to use Facebook (56%).

Platform	Overall (n=477)	Partners (n=32)	Younger Families (n=153)	Older Families (n=96)	Younger Friends (n=80)	Older Friends (n=102)
YouTube	80%	83%	81%	77%	78%	86%
Facebook	72%	67%	78%	80%	56% ▼	70%
Instagram	55%	37%	66% ▲	47%	60%	47%
TikTok	44%	40%	56% ▲	35%	47%	33%
Reddit	33%	23%	37%	22%	43%	32%
X (formerly known as Twitter)	33%	24%	38%	30%	37%	26%
Pinterest	18%	20%	17%	13%	18%	24%
WhatsApp	17%	10%	19%	22%	15%	14%
Snapchat	15%	11%	22% ▲	12%	14%	11%
Threads	7%	5%	12% ▲	6%	6%	2%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who use social media to plan (B4) (n=477). B4B Which social media platforms do you use to obtain information about your fishing trips? Please select all that apply.

"Not sure" (<1%) not shown.

HOW FISHING TRIPS ARE BOOKED – MARKET

All anglers

More than half of anglers book directly with accommodation providers (57%), and half through an online booking platform (48%). A third book informally through friends or personal contacts (35%) and a quarter directly with outfitters or guides (26%).

Rest of Canada anglers are less likely than other markets to book through an online booking platform (36%).

Booking method	Overall (n=1,041)	Ontario (n=84)	Rest of Canada (n=153)	U.S. Drive (n=684)	U.S. Fly (n=119)
Directly with accommodation providers (lodge, hotel, cottage)	57%	51%	48%	60%	60%
Through an online booking platform (e.g., Booking.com, Expedia)	48%	36%	36% ▼	50%	57%
Informally through friends or personal contacts	35%	40%	39%	33%	38%
Directly with outfitters or guides	26%	24%	31%	23%	35%
Through a travel agent or tour operator	14%	4%	12%	15%	17%
Through a sporting or outdoor club or association	13%	8%	10%	14%	18%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,041). B2 How do you typically book your fishing trips? Please select all that apply. "Not sure" (2%) not shown.

HOW FISHING TRIPS ARE BOOKED – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to book through an online booking platform (61%) or a travel agent or tour operator (23%), and older families less likely to book online (39%).

Partners are less likely to book informally through friends or personal contacts (20%).

Booking method	Overall (n=1,041)	Partners (n=100)	Younger Families (n=267)	Older Families (n=267)	Younger Friends (n=147)	Older Friends (n=215)
Directly with accommodation providers (lodge, hotel, cottage)	57%	64%	59%	60%	54%	53%
Through an online booking platform (e.g., Booking.com, Expedia)	48%	36%	61% ▲	39% ▼	56%	48%
Informally through friends or personal contacts	35%	20% ▼	36%	36%	39%	38%
Directly with outfitters or guides	26%	22%	31%	24%	26%	19%
Through a travel agent or tour operator	14%	13%	23% ▲	11%	12%	8%
Through a sporting or outdoor club or association	13%	11%	17%	10%	13%	13%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,041). B2 How do you typically book your fishing trips? Please select all that apply. "Not sure" (2%) not shown.

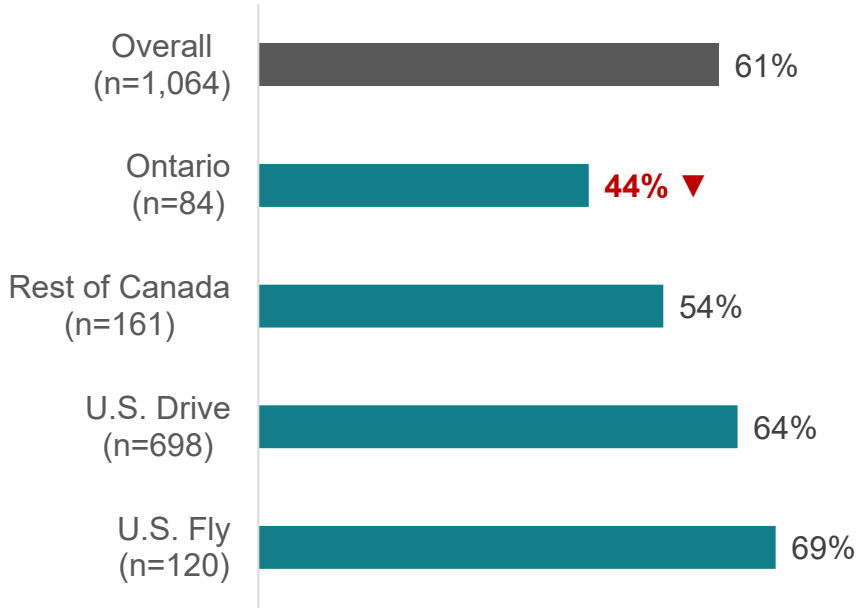
IMPORTANCE OF WORKING WITH LOCAL OPERATORS

All anglers | Traveller types are defined on slide 10

Six in ten anglers (61%) say working with a local outfitter, guide, operator or accommodation provider is important when planning a fishing trip.

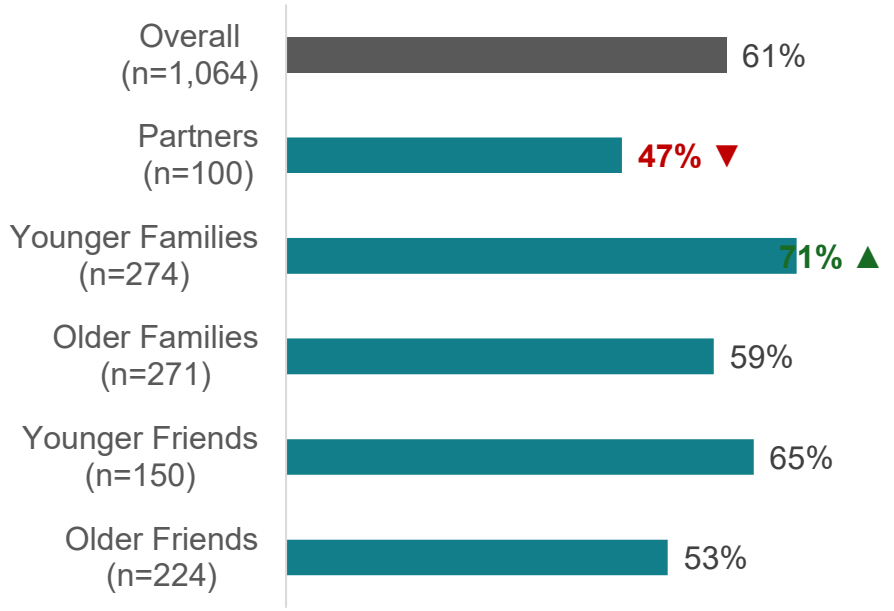
Ontario anglers are less likely than other markets to say it is important (44%). Younger families are more likely than other traveller types to say it is important (71%), and partners less likely (47%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,064). B3 (TOP2) When planning a fishing trip, how important is working with a local outfitter, guide, operator or accommodation provider? TOP2 = % somewhat or very important.

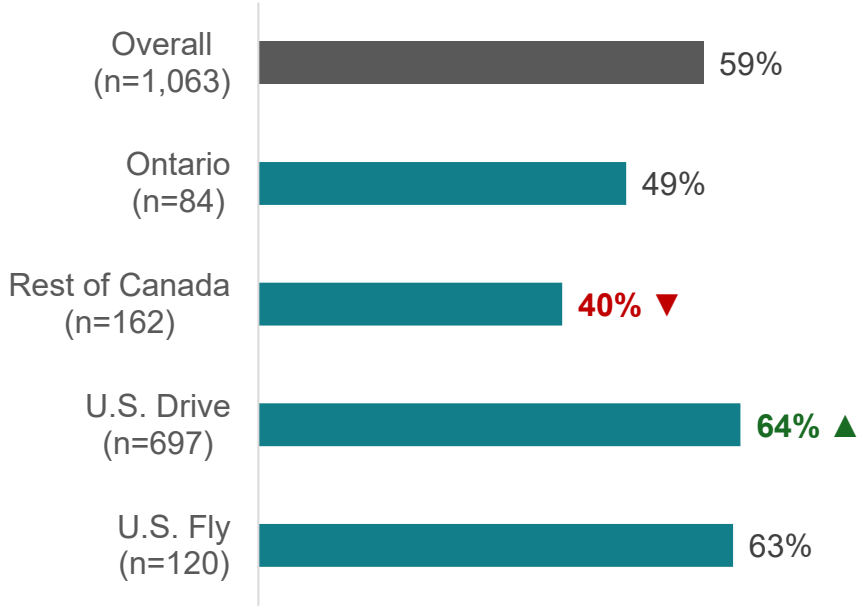
LIKELIHOOD OF USING AI TOOLS TO PLAN

All anglers | Traveller types are defined on slide 10

Six in ten anglers (59%) are likely to use AI tools to help plan their next fishing trip, including 30% who are very likely.

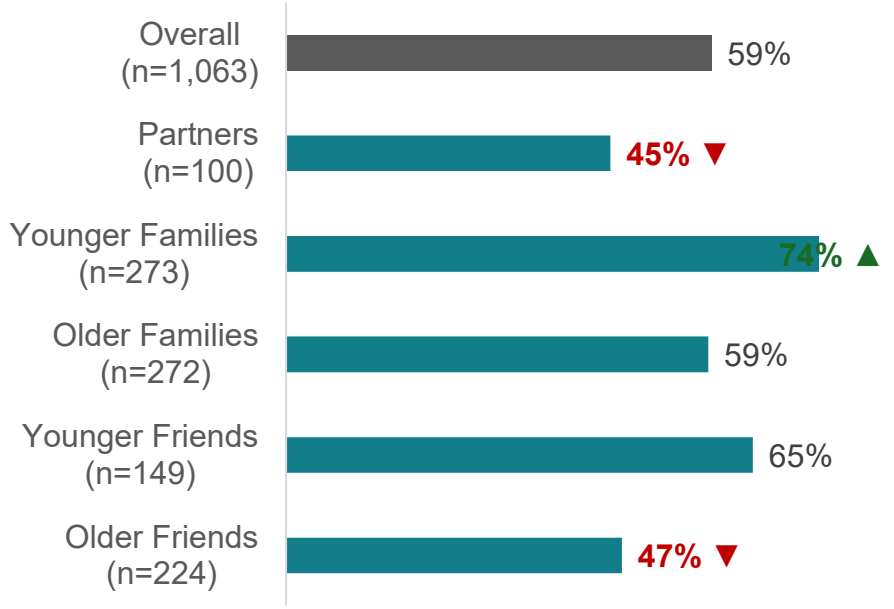
U.S. Drive anglers are more likely than other markets to use AI tools (64%), and Rest of Canada anglers less likely (40%). Younger families are more likely than other traveller types (74%), and partners (45%) and older friend groups (47%) less likely.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers, excluding “Don’t know” (n=1,063). B5 (TOP2) How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next fishing trip? TOP2 = % somewhat or very likely.



MOTIVATION & VALUES

MOTIVATIONS FOR FISHING – MARKET (1 OF 2)

All anglers

Escape from everyday stress (64%), catching fish regardless of whether they keep them (64%), connection with nature (63%) and bonding with friends or family (59%) are anglers' leading motivations, followed by experiencing new places (51%) and thrill or adventure (48%).

None of the market differences are significant.

Motivation	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Escape from everyday stress and routine	64%	52%	63%	67%	58%
Catching fish, regardless of whether I keep them (catch and release)	64%	59%	63%	64%	67%
Connection with nature and the outdoors	63%	61%	67%	62%	59%
Bonding with friends or family	59%	65%	57%	59%	57%
Experiencing new places and landscapes	51%	45%	47%	52%	57%
Thrill, challenge, or sense of adventure	48%	46%	43%	49%	49%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). M1 What are your primary motivations for taking fishing trips? Please select all that apply. "Not sure" (<1%) not shown.

MOTIVATIONS FOR FISHING – MARKET (2 OF 2)

All anglers

Wildlife encounters (46%) and solitude (40%) motivate four in ten anglers, while about a quarter are motivated by catching or harvesting the target species (27%) and a fifth each by sourcing food, tradition and fitness (20%).

None of the market differences are significant.

Motivation	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Wildlife encounters and natural discovery	46%	41%	41%	47%	49%
Solitude and personal reflection	40%	37%	39%	40%	39%
Catching / harvesting the target species	27%	25%	27%	27%	25%
Sourcing natural, local, or ethically harvested food	20%	19%	15%	21%	23%
Tradition or cultural heritage related to the activity	20%	12%	15%	21%	26%
Physical fitness and health	20%	22%	20%	19%	22%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). M1 What are your primary motivations for taking fishing trips? Please select all that apply. "Not sure" (<1%) not shown.

MOTIVATIONS FOR FISHING – TRAVELLER TYPE (1 OF 2)

All anglers | Traveller types are defined on slide 10

Partners are less likely than other traveller types to be motivated by bonding with friends or family (31%), and younger families more likely (67%). Younger friend groups are less likely to be motivated by connection with nature (50%).

Motivation	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Escape from everyday stress and routine	64%	50%	61%	70%	65%	69%
Catching fish, regardless of whether I keep them (catch and release)	64%	60%	63%	63%	61%	72%
Connection with nature and the outdoors	63%	70%	63%	64%	50% ▼	68%
Bonding with friends or family	59%	31% ▼	67% ▲	64%	58%	63%
Experiencing new places and landscapes	51%	48%	55%	46%	48%	58%
Thrill, challenge, or sense of adventure	48%	43%	44%	51%	49%	54%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). M1 What are your primary motivations for taking fishing trips? Please select all that apply. "Not sure" (<1%) not shown.

MOTIVATIONS FOR FISHING – TRAVELLER TYPE (2 OF 2)

All anglers | Traveller types are defined on slide 10

Older friend groups are more likely than other traveller types to be motivated by catching or harvesting the target species (37%), and younger families by sourcing natural, local or ethically harvested food (28%).

Solitude ranges from 34% among younger friend groups to 49% among partners.

Motivation	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Wildlife encounters and natural discovery	46%	56%	47%	41%	45%	50%
Solitude and personal reflection	40%	49%	37%	38%	34%	46%
Catching / harvesting the target species	27%	22%	29%	21%	19%	37% ▲
Sourcing natural, local, or ethically harvested food	20%	14%	28% ▲	17%	21%	19%
Tradition or cultural heritage related to the activity	20%	17%	24%	21%	17%	18%
Physical fitness and health	20%	22%	22%	17%	21%	17%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). M1 What are your primary motivations for taking fishing trips? Please select all that apply. "Not sure" (<1%) not shown.

EXPERIENCES THAT WOULD ENHANCE A TRIP – MARKET (1 OF 2)

All anglers

Northern Lights or dark sky viewing (50%), scenic driving (47%), wildlife viewing (47%) and local markets, retail and artisans (46%) are the experiences most likely to enhance a fishing trip, followed by culinary experiences (39%) and local breweries or distilleries (35%). Three in ten (30%) are interested in all-inclusive lodge packages with guided fishing.

Ontario anglers are the least interested in Northern Lights viewing (35%), although market differences are not significant.

Experience	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Northern Lights or dark sky viewing experiences	50%	35%	49%	51%	55%
Scenic driving or road trip components	47%	48%	42%	49%	47%
Wildlife viewing separate from hunting or fishing	47%	51%	43%	48%	42%
Visting local markets, retail and artisans	46%	50%	45%	46%	42%
Culinary experiences featuring locally sourced or freshly caught / harvested food	39%	35%	36%	41%	37%
Visiting local breweries or distilleries	35%	37%	28%	38%	31%
All-inclusive lodge packages with guided fishing	30%	23%	27%	31%	37%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	27%	21%	22%	28%	29%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

EXPERIENCES THAT WOULD ENHANCE A TRIP – MARKET (2 OF 2)

All anglers

About a fifth of anglers are interested in Indigenous-led experiences (22%), multi-stop itineraries and wellness experiences (19% each), and 13% in fishing derbies or tournaments. Only 3% prefer to focus entirely on fishing.

None of the market differences are significant.

Experience	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Photography or nature interpretation guided experiences	26%	24%	21%	27%	28%
Indigenous-led cultural or land-based experiences	22%	16%	16%	24%	25%
Multi-stop regional itineraries combining several Northern Ontario areas	19%	16%	14%	20%	25%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	19%	14%	18%	20%	18%
Learning and interpretation opportunities	17%	7%	13%	19%	17%
Youth or family-oriented introduction-to-fishing programs	14%	11%	9%	15%	14%
Fishing derbies or tournaments	13%	18%	11%	12%	19%
None – I prefer to focus entirely on the activity	3%	6%	4%	2%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

EXPERIENCES THAT WOULD ENHANCE A TRIP – TRAVELLER TYPE (1 OF 2)

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in multi-activity packages (37%).

Older friend groups are the most interested in Northern Lights viewing (58%), scenic driving (54%) and local markets (55%), although these differences are not significant.

Experience	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Northern Lights or dark sky viewing experiences	50%	52%	47%	48%	49%	58%
Scenic driving or road trip components	47%	52%	48%	46%	38%	54%
Wildlife viewing separate from hunting or fishing	47%	50%	48%	45%	46%	49%
Visting local markets, retail and artisans	46%	50%	41%	47%	41%	55%
Culinary experiences featuring locally sourced or freshly caught / harvested food	39%	31%	41%	37%	37%	47%
Visiting local breweries or distilleries	35%	27%	34%	34%	37%	44%
All-inclusive lodge packages with guided fishing	30%	26%	36%	30%	24%	31%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	27%	21%	37% ▲	25%	26%	23%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

EXPERIENCES THAT WOULD ENHANCE A TRIP – TRAVELLER TYPE (2 OF 2)

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in youth or family introduction-to-fishing programs (29%), wellness experiences (30%) and fishing derbies or tournaments (19%), while partners and older friend groups are less interested in youth programs (4% each) and older friend groups in wellness (11%).

Experience	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Photography or nature interpretation guided experiences	26%	26%	30%	22%	32%	22%
Indigenous-led cultural or land-based experiences	22%	16%	25%	22%	21%	19%
Multi-stop regional itineraries combining several Northern Ontario areas	19%	19%	21%	17%	20%	21%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	19%	15%	30% ▲	18%	19%	11% ▼
Learning and interpretation opportunities	17%	12%	22%	14%	17%	15%
Youth or family-oriented introduction-to-fishing programs	14%	4%	29% ▲	13%	10%	4% ▼
Fishing derbies or tournaments	13%	7%	19% ▲	11%	19%	9%
None – I prefer to focus entirely on the activity	3%	1%	4%	2%	5%	2%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

WHAT MAKES A TRIP SUCCESSFUL – MARKET (1 OF 2)

Anglers who provided a response

When asked what makes a fishing trip successful, more than half of anglers mention catching fish (55%) and fun and enjoyment (51%), followed by quality time with family and friends (35%), connection with nature (26%), relaxation (25%) and accommodation and food (21%).

None of the market differences are significant.

Theme	Overall (n=1,036)	Ontario (n=84)	Rest of Canada (n=160)	U.S. Drive (n=675)	U.S. Fly (n=117)
Successful Harvest / Catching Fish or Game	55%	64%	45%	56%	51%
Fun & Enjoyment	51%	40%	41%	55%	49%
Quality Time with Family & Friends	35%	43%	34%	36%	28%
Connection with Nature & Scenery	26%	19%	27%	26%	28%
Relaxation & Stress Relief	25%	18%	25%	26%	21%
Accommodation & Food	21%	20%	28%	20%	19%
Good Weather	7%	10%	9%	7%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who provided a response (n=1,036). M3 In your own words, what makes a fishing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

WHAT MAKES A TRIP SUCCESSFUL – MARKET (2 OF 2)

Anglers who provided a response

Each remaining theme is mentioned by fewer than one in ten anglers, and 16% give an overall positive or general response.

None of the market differences are significant.

Theme	Overall (n=1,036)	Ontario (n=84)	Rest of Canada (n=160)	U.S. Drive (n=675)	U.S. Fly (n=117)
Mental Wellness / Disconnecting from Daily Life	7%	7%	6%	8%	5%
Safety & No Incidents	4%	2%	5%	4%	6%
New Experiences & Exploration	4%	1%	9%	3%	6%
Planning & Organization	3%	2%	2%	3%	5%
Physical Activity & Exercise	2%	3%	2%	1%	2%
Affordability & Value for Money	1%	4%	2%	1%	2%
Overall Positive / General Satisfaction	16%	11%	11%	16%	20%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who provided a response (n=1,036). M3 In your own words, what makes a fishing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

WHAT MAKES A TRIP SUCCESSFUL – TRAVELLER TYPE (1 OF 2)

Anglers who provided a response | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to mention fun and enjoyment (60%), and older families quality time with family and friends (46%).

Theme	Overall (n=1,036)	Partners (n=98)	Younger Families (n=266)	Older Families (n=265)	Younger Friends (n=144)	Older Friends (n=218)
Successful Harvest / Catching Fish or Game	55%	54%	56%	50%	58%	56%
Fun & Enjoyment	51%	41%	60% ▲	52%	56%	45%
Quality Time with Family & Friends	35%	20%	39%	46% ▲	26%	33%
Connection with Nature & Scenery	26%	33%	25%	26%	22%	24%
Relaxation & Stress Relief	25%	35%	24%	21%	22%	24%
Accommodation & Food	21%	17%	18%	25%	17%	28%
Good Weather	7%	9%	6%	9%	6%	8%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who provided a response (n=1,036). M3 In your own words, what makes a fishing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

WHAT MAKES A TRIP SUCCESSFUL – TRAVELLER TYPE (2 OF 2)

Anglers who provided a response | Traveller types are defined on slide 10

Each remaining theme is mentioned by 12% or fewer in every traveller type.

None of the traveller type differences are significant.

Theme	Overall (n=1,036)	Partners (n=98)	Younger Families (n=266)	Older Families (n=265)	Younger Friends (n=144)	Older Friends (n=218)
Mental Wellness / Disconnecting from Daily Life	7%	12%	5%	6%	7%	7%
Safety & No Incidents	4%	3%	4%	3%	6%	6%
New Experiences & Exploration	4%	5%	3%	5%	6%	3%
Planning & Organization	3%	3%	3%	1%	5%	2%
Physical Activity & Exercise	2%	4%	1%	2%	<1%	1%
Affordability & Value for Money	1%	0%	2%	2%	1%	1%
Overall Positive / General Satisfaction	16%	16%	20%	11%	21%	13%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who provided a response (n=1,036). M3 In your own words, what makes a fishing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – MARKET (1 OF 2)

Anglers who provided a response

Anglers see Northern Ontario's vast, untouched wilderness (43%) as its greatest advantage for fishing, followed by its scenery (25%), its lakes, rivers and water access (24%) and being less crowded (23%). Great fishing opportunities are mentioned by 16%.

Ontario anglers are the most likely to mention lakes and water access (34%) and proximity to home (16%), although market differences are not significant.

Advantage	Overall (n=892)	Ontario (n=75)	Rest of Canada (n=127)	U.S. Drive (n=589)	U.S. Fly (n=100)
Vast, Untouched Wilderness & Nature	43%	45%	49%	41%	47%
Beautiful Scenery & Landscapes	25%	29%	21%	24%	29%
Abundance of Lakes, Rivers & Water Access	24%	34%	29%	22%	21%
Less Crowded / Solitude	23%	25%	20%	24%	22%
Great Fishing Opportunities	16%	18%	15%	16%	12%
Authenticity & Unique Experience	13%	7%	14%	13%	15%
Wide Range of Outdoor Activities	8%	11%	8%	7%	11%
Proximity / Accessibility from Home	7%	16%	7%	6%	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who provided a response (n=892). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for fishing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – MARKET (2 OF 2)

Anglers who provided a response

Each of the remaining advantages is mentioned by fewer than one in ten anglers.

None of the market differences are significant.

Advantage	Overall (n=892)	Ontario (n=75)	Rest of Canada (n=127)	U.S. Drive (n=589)	U.S. Fly (n=100)
Unfamiliar / Open to Discovering	7%	6%	5%	7%	9%
Great Hunting Opportunities	6%	1%	4%	7%	9%
Northern Lights	4%	3%	0%	5%	3%
Friendly Locals & Hospitality	3%	4%	1%	3%	3%
Affordable / Good Value	2%	2%	2%	3%	1%
Cultural & Indigenous Heritage	2%	0%	2%	2%	1%
Dark Skies & Stargazing	1%	0%	2%	1%	0%
Wildlife Viewing & Biodiversity	1%	0%	1%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who provided a response (n=892). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for fishing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – TRAVELLER TYPE (1 OF 2)

Anglers who provided a response | Traveller types are defined on slide 10

Wilderness is the top advantage for every traveller type, from 38% among older families to 51% among older friend groups.

None of the traveller type differences are significant.

Advantage	Overall (n=892)	Partners (n=86)	Younger Families (n=223)	Older Families (n=235)	Younger Friends (n=117)	Older Friends (n=188)
Vast, Untouched Wilderness & Nature	43%	40%	40%	38%	46%	51%
Beautiful Scenery & Landscapes	25%	20%	24%	25%	25%	27%
Abundance of Lakes, Rivers & Water Access	24%	15%	22%	23%	33%	25%
Less Crowded / Solitude	23%	24%	22%	20%	24%	26%
Great Fishing Opportunities	16%	12%	15%	19%	19%	15%
Authenticity & Unique Experience	13%	11%	15%	11%	12%	13%
Wide Range of Outdoor Activities	8%	7%	9%	7%	7%	8%
Proximity / Accessibility from Home	7%	15%	6%	6%	9%	5%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who provided a response (n=892). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for fishing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – TRAVELLER TYPE (2 OF 2)

Anglers who provided a response | Traveller types are defined on slide 10

Each remaining advantage is mentioned by 10% or fewer in every traveller type.

None of the traveller type differences are significant.

Advantage	Overall (n=892)	Partners (n=86)	Younger Families (n=223)	Older Families (n=235)	Younger Friends (n=117)	Older Friends (n=188)
Unfamiliar / Open to Discovering	7%	9%	7%	7%	2%	10%
Great Hunting Opportunities	6%	4%	7%	6%	8%	5%
Northern Lights	4%	5%	3%	3%	6%	4%
Friendly Locals & Hospitality	3%	2%	4%	5%	3%	1%
Affordable / Good Value	2%	4%	3%	2%	1%	2%
Cultural & Indigenous Heritage	2%	2%	2%	1%	2%	2%
Dark Skies & Stargazing	1%	0%	1%	2%	1%	1%
Wildlife Viewing & Biodiversity	1%	3%	1%	0%	2%	1%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who provided a response (n=892). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for fishing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

MEANING OF SUSTAINABLE TOURISM – MARKET (1 OF 2)

Anglers who provided a response

Anglers most often describe sustainable tourism as environmental protection and minimal impact (37%), followed by preservation for future generations (20%), support for local communities (11%) and respecting wildlife and natural habitats (10%).

Ontario anglers are the most likely to mention leaving no trace (12%), although market differences are not significant.

Meaning	Overall (n=1,063)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=695)	U.S. Fly (n=120)
Environmental Protection & Minimal Impact	37%	43%	42%	36%	37%
Preservation for Future Generations	20%	14%	20%	20%	27%
Support for Local Communities & Economy	11%	11%	9%	11%	12%
Respecting Wildlife & Natural Habitats	10%	16%	11%	9%	7%
Tourism That Sustains Itself / Repeat Visitation	7%	4%	4%	8%	6%
Responsible Travel Behaviour	6%	11%	4%	5%	9%
Leave No Trace / Leave It As You Found It	5%	12%	5%	5%	1%
Eco-Friendly Practices & Green Transport	4%	5%	3%	5%	2%
Reducing Waste & Pollution	4%	6%	6%	4%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who provided a response (n=1,063). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

MEANING OF SUSTAINABLE TOURISM – MARKET (2 OF 2)

Anglers who provided a response

Each remaining theme is mentioned by 3% of anglers or fewer, while 18% give a general or vague response and 30% are unsure or give another response.

None of the market differences are significant.

Meaning	Overall (n=1,063)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=695)	U.S. Fly (n=120)
Balancing Tourism & Conservation	4%	3%	3%	5%	1%
Cultural Respect & Indigenous Communities	3%	7%	3%	3%	4%
Safety & Security for Tourists	2%	3%	2%	1%	1%
Nature-Based / Immersive Experience	2%	0%	1%	2%	0%
Accessible & Inclusive Tourism	1%	0%	2%	1%	2%
Cleanliness & Well-Maintained Destinations	1%	0%	0%	1%	0%
General Awareness / Vague Positive	18%	16%	17%	18%	19%
Negative Sentiment / Dismissive	1%	2%	<1%	1%	0%
Gibberish / Incomprehensible	1%	1%	<1%	1%	2%
Unsure / Other	30%	19%	31%	31%	28%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who provided a response (n=1,063). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

MEANING OF SUSTAINABLE TOURISM – TRAVELLER TYPE (1 OF 2)

Anglers who provided a response | Traveller types are defined on slide 10

Environmental protection is the most common description for every traveller type, from 35% among partners to 41% among younger friend groups.

None of the traveller type differences are significant.

Meaning	Overall (n=1,063)	Partners (n=101)	Younger Families (n=273)	Older Families (n=271)	Younger Friends (n=149)	Older Friends (n=224)
Environmental Protection & Minimal Impact	37%	35%	37%	37%	41%	37%
Preservation for Future Generations	20%	27%	20%	19%	16%	21%
Support for Local Communities & Economy	11%	9%	11%	12%	8%	13%
Respecting Wildlife & Natural Habitats	10%	5%	8%	13%	10%	10%
Tourism That Sustains Itself / Repeat Visitation	7%	6%	8%	8%	7%	5%
Responsible Travel Behaviour	6%	8%	6%	7%	4%	6%
Leave No Trace / Leave It As You Found It	5%	10%	5%	3%	6%	3%
Eco-Friendly Practices & Green Transport	4%	4%	4%	3%	6%	5%
Reducing Waste & Pollution	4%	5%	5%	3%	5%	4%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who provided a response (n=1,063). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

MEANING OF SUSTAINABLE TOURISM – TRAVELLER TYPE (2 OF 2)

Anglers who provided a response | Traveller types are defined on slide 10

Unsure or other responses range from 25% among younger friend groups to 32% among younger families.

None of the traveller type differences are significant.

Meaning	Overall (n=1,063)	Partners (n=101)	Younger Families (n=273)	Older Families (n=271)	Younger Friends (n=149)	Older Friends (n=224)
Balancing Tourism & Conservation	4%	2%	4%	3%	6%	5%
Cultural Respect & Indigenous Communities	3%	3%	3%	4%	2%	2%
Safety & Security for Tourists	2%	1%	1%	3%	1%	2%
Nature-Based / Immersive Experience	2%	0%	1%	3%	2%	2%
Accessible & Inclusive Tourism	1%	1%	1%	1%	<1%	2%
Cleanliness & Well-Maintained Destinations	1%	3%	1%	1%	2%	0%
General Awareness / Vague Positive	18%	20%	19%	18%	15%	16%
Negative Sentiment / Dismissive	1%	0%	1%	1%	1%	1%
Gibberish / Incomprehensible	1%	1%	1%	0%	1%	1%
Unsure / Other	30%	29%	32%	31%	25%	30%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who provided a response (n=1,063). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – MARKET

All anglers

Supporting local, independently owned businesses (90%), conservation (88%) and minimal environmental impact (87%) are important considerations for nearly all anglers when choosing a destination.

U.S. Drive anglers are more likely than other markets to value learning about Indigenous culture and history (77%), and Ontario (49%) and Rest of Canada anglers (54%) less likely.

Consideration	Overall (n=1,066)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Supporting local, independently owned businesses	90%	83%	87%	91%	87%
Conservation and responsible resource management	88%	87%	88%	89%	89%
Minimal environmental impact of tourism in the area	87%	79%	90%	86%	90%
Community benefit – tourism dollars staying in the local community	84%	77%	83%	85%	84%
Learning about Indigenous culture and history	71%	49% ▼	54% ▼	77% ▲	74%
Accessibility for people with mobility or physical needs	70%	58%	63%	72%	72%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,055 to 1,066). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to value learning about Indigenous culture (80%) and accessibility (78%), and partners less likely to value Indigenous culture (56%).

Consideration	Overall (n=1,066)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Supporting local, independently owned businesses	90%	88%	93%	89%	87%	92%
Conservation and responsible resource management	88%	83%	92%	88%	90%	87%
Minimal environmental impact of tourism in the area	87%	82%	89%	86%	86%	89%
Community benefit – tourism dollars staying in the local community	84%	80%	86%	84%	83%	85%
Learning about Indigenous culture and history	71%	56% ▼	80% ▲	72%	70%	68%
Accessibility for people with mobility or physical needs	70%	58%	78% ▲	70%	61%	71%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,055 to 1,066). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (1 OF 2)

All anglers

Nearly all anglers agree that fishing is part of responsible, sustainable use of natural resources (93%) and feel a personal responsibility to protect the environments they visit (92%), and 86% are interested in contributing to wildlife conservation.

Rest of Canada anglers are less likely than other markets to agree fishing is part of sustainable resource use (87%).

Statement	Overall (n=1,065)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=698)	U.S. Fly (n=120)
Fishing is part of responsible, sustainable use of natural resources	93%	94%	87% ▼	95%	93%
I feel a personal responsibility to protect natural environments I visit	92%	92%	92%	92%	93%
I am interested in contributing to wildlife conservation when I travel	86%	81%	81%	87%	87%
I am interested in sourcing natural or ethically harvested food through travel	79%	77%	76%	81%	72%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	79%	79%	71%	81%	79%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,054 to 1,065). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (2 OF 2)

All anglers

Three-quarters would be interested in an Indigenous-led guided experience (76%), and about seven in ten would pay more for a clear conservation benefit (73%), seek out eco-friendly options (73%) or look for certified operators (69%).

U.S. Drive anglers are more likely than other markets to be interested in an Indigenous-led experience (81%), to pay more for a conservation benefit (77%) and to seek out eco-friendly options (76%), while Rest of Canada anglers are less likely on each (58% to 62%) and Ontario anglers are less interested in Indigenous-led experiences (59%).

Statement	Overall (n=1,065)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=698)	U.S. Fly (n=120)
I would be interested in an Indigenous-led guided experience	76%	59% ▼	59% ▼	81% ▲	79%
I would pay more for a trip that had a clear conservation benefit	73%	66%	60% ▼	77% ▲	73%
I actively seek out eco-friendly or sustainable travel options	73%	65%	62% ▼	76% ▲	77%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	69%	62%	58% ▼	72%	71%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,054 to 1,065). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – TRAVELLER TYPE (1 OF 2)

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in sourcing ethically harvested food (88%) and to accept visible sustainable practices (85%), and older friend groups less interested in sourcing food (70%).

Statement	Overall (n=1,065)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Fishing is part of responsible, sustainable use of natural resources	93%	88%	96%	94%	93%	93%
I feel a personal responsibility to protect natural environments I visit	92%	90%	90%	94%	92%	93%
I am interested in contributing to wildlife conservation when I travel	86%	85%	90%	86%	86%	81%
I am interested in sourcing natural or ethically harvested food through travel	79%	74%	88% ▲	77%	81%	70% ▼
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	79%	83%	85% ▲	79%	77%	75%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,054 to 1,065). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – TRAVELLER TYPE (2 OF 2)

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to agree with each statement on this slide (76% to 83%), while partners are less interested in an Indigenous-led experience (57%).

Statement	Overall (n=1,065)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
I would be interested in an Indigenous-led guided experience	76%	57% ▼	83% ▲	75%	76%	74%
I would pay more for a trip that had a clear conservation benefit	73%	64%	80% ▲	71%	75%	70%
I actively seek out eco-friendly or sustainable travel options	73%	74%	80% ▲	71%	70%	67%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	69%	62%	76% ▲	68%	69%	64%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,054 to 1,065). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.



AWARENESS & PERCEPTION

AWARENESS OF NORTHERN ONTARIO – MARKET

Anglers who do not live in Northern Ontario

Eight in ten anglers know a lot (33%) or a little (47%) about Northern Ontario, while 16% have heard of it but know nothing about it and only 3% have never heard of it.

Ontario anglers all know at least something about Northern Ontario (0% know nothing), significantly fewer than other markets.

Awareness	Overall (n=1,062)	Ontario (n=80)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
I have heard of and know a lot about it	33%	43%	26%	34%	34%
I have heard of and know a little bit about it	47%	57%	50%	45%	48%
I have heard of but know nothing about it	16%	0% ▼	18%	18%	16%
I have never heard of before	3%	0%	6%	3%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who do not live in Northern Ontario (n=1,062). N0 How would you best describe your awareness of Northern Ontario?

AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

Anglers who do not live in Northern Ontario | Traveller types are defined on slide 10

Partners are more likely than other traveller types to know nothing about Northern Ontario (27%), and younger families less likely (11%). Older friend groups are more likely to know a little about it (56%).

Awareness	Overall (n=1,062)	Partners (n=100)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=149)	Older Friends (n=221)
I have heard of and know a lot about it	33%	30%	38%	32%	37%	28%
I have heard of and know a little bit about it	47%	40%	49%	42%	49%	56% ▲
I have heard of but know nothing about it	16%	27% ▲	11% ▼	21%	11%	14%
I have never heard of before	3%	2%	2%	5%	3%	2%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who do not live in Northern Ontario (n=1,062). N0 How would you best describe your awareness of Northern Ontario?

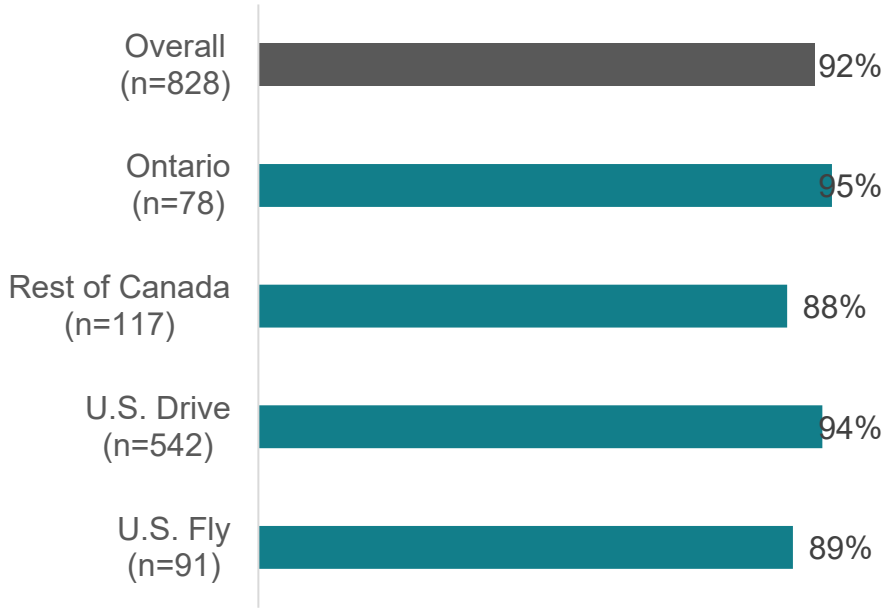
RATING OF NORTHERN ONTARIO FOR FISHING

Anglers who know a lot or a little about Northern Ontario | Traveller types are defined on slide 10

More than nine in ten anglers who know Northern Ontario (92%) rate it 4 or 5 out of 5 as a pleasure travel destination for fishing, including 55% who rate it excellent.

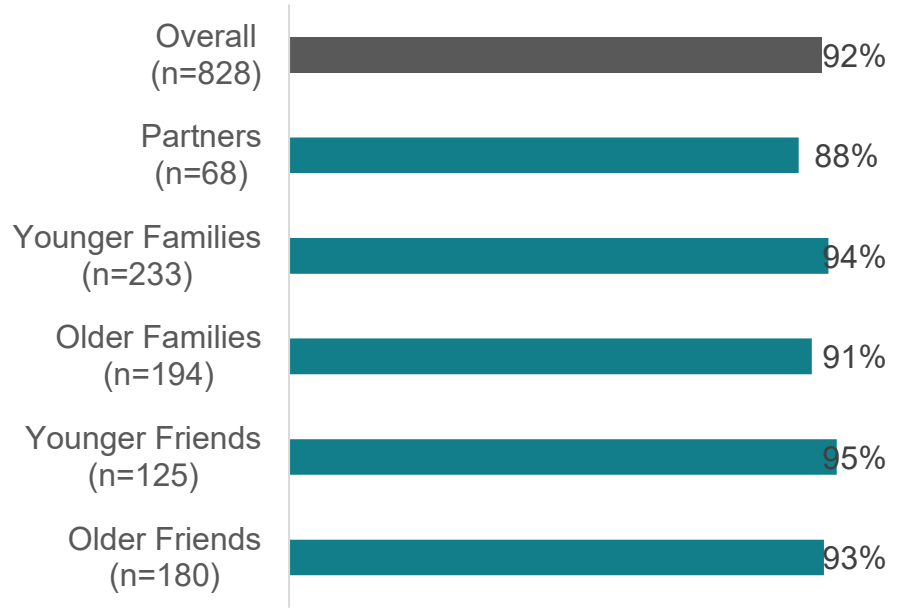
Ratings range from 88% among Rest of Canada anglers and partners to 95% among Ontario anglers and younger friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=828). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for fishing? TOP2 = % rating 4 or 5 (1 = Poor, 5 = Excellent).

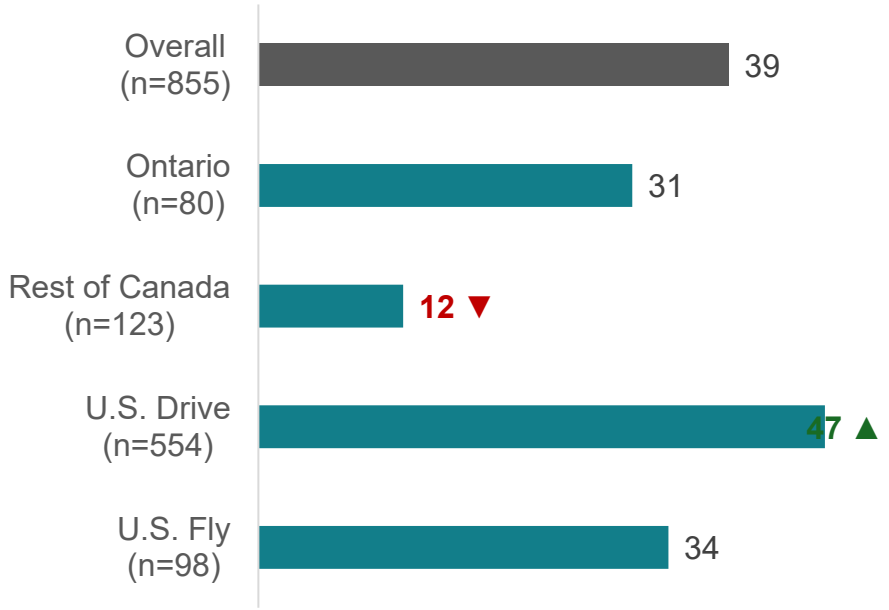
LIKELIHOOD TO RECOMMEND NORTHERN ONTARIO (NPS)

Anglers who know a lot or a little about Northern Ontario | Traveller types are defined on slide 10

Northern Ontario has a Net Promoter Score (NPS) of 39 among anglers who know it, with 52% promoters and 14% detractors.

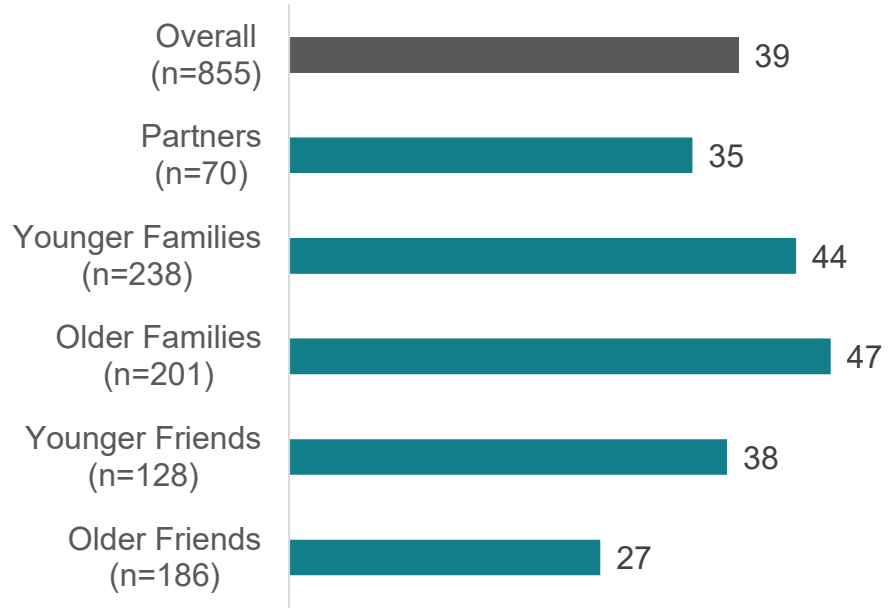
U.S. Drive anglers give a higher score than other markets (47), and Rest of Canada anglers a lower score (12). Among traveller types, the NPS ranges from 27 among older friend groups to 47 among older families.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who know a lot or a little about Northern Ontario (n=855). N2 (NPS) How likely would you be to recommend Northern Ontario to a friend or colleague as a destination for fishing? (0 = Not at all likely, 10 = Extremely likely) NPS = % promoters (9–10) minus % detractors (0–6).

PERCEPTIONS OF NORTHERN ONTARIO – MARKET

Anglers who know a lot or a little about Northern Ontario

Nearly all anglers who know Northern Ontario agree it offers a wide variety of fishing experiences and excellent fishing experiences (95% each), and 93% would seriously consider it for fishing and find it welcoming. Eight in ten (80%) know enough about it to plan a fishing trip, and 78% say it is better than alternatives closer to home.

U.S. Drive anglers are more likely than other markets to say Northern Ontario is better than alternatives closer to home (83%), and Rest of Canada anglers less likely (57%).

Statement	Overall (n=848)	Ontario (n=80)	Rest of Canada (n=123)	U.S. Drive (n=550)	U.S. Fly (n=96)
Northern Ontario offers a wide variety of fishing experiences	95%	89%	95%	95%	96%
Northern Ontario offers excellent fishing experiences	95%	92%	94%	95%	97%
Northern Ontario is a destination I would seriously consider for fishing	93%	91%	90%	94%	96%
Northern Ontario feels welcoming to travellers like me	93%	89%	91%	94%	92%
I know enough about Northern Ontario to plan a fishing trip there	80%	85%	71%	81%	77%
For fishing, Northern Ontario is better than alternatives I could choose closer to home	78%	77%	57% ▼	83% ▲	75%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=836 to 848). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

PERCEPTIONS OF NORTHERN ONTARIO – TRAVELLER TYPE

Anglers who know a lot or a little about Northern Ontario | Traveller types are defined on slide 10

Agreement with each statement is high for every traveller type.

None of the traveller type differences are significant.

Statement	Overall (n=848)	Partners (n=70)	Younger Families (n=236)	Older Families (n=198)	Younger Friends (n=127)	Older Friends (n=186)
Northern Ontario offers a wide variety of fishing experiences	95%	94%	96%	97%	94%	94%
Northern Ontario offers excellent fishing experiences	95%	91%	94%	96%	98%	94%
Northern Ontario is a destination I would seriously consider for fishing	93%	91%	94%	96%	94%	91%
Northern Ontario feels welcoming to travellers like me	93%	91%	92%	95%	97%	91%
I know enough about Northern Ontario to plan a fishing trip there	80%	82%	82%	80%	79%	79%
For fishing, Northern Ontario is better than alternatives I could choose closer to home	78%	75%	82%	79%	82%	70%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=836 to 848). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – MARKET

Anglers who know a lot or a little about Northern Ontario

Anglers who know Northern Ontario agree it has authentic campfire and wilderness experiences, excellent fishing and pristine lakes and waterways (94% each), as well as remote wilderness (91%) and Northern Lights viewing opportunities (90%). Good value for money (88%) and rich Indigenous culture (88%) are rated slightly lower.

None of the market differences are significant.

Northern Ontario has…	Overall (n=842)	Ontario (n=79)	Rest of Canada (n=121)	U.S. Drive (n=548)	U.S. Fly (n=96)
Authentic campfire and wilderness experiences	94%	94%	93%	95%	94%
Excellent fishing	94%	89%	95%	94%	94%
Pristine lakes and waterways	94%	92%	97%	93%	97%
Remote, untouched wilderness	91%	85%	92%	92%	89%
Opportunities to see the Northern Lights (Aurora Borealis)	90%	82%	89%	91%	93%
Dark skies ideal for stargazing	90%	90%	92%	89%	89%
Small, welcoming communities	90%	88%	83%	91%	90%
Good value for money	88%	86%	80%	90%	87%
Rich Indigenous culture and heritage	88%	81%	82%	89%	90%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=812 to 842). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – TRAVELLER TYPE

Anglers who know a lot or a little about Northern Ontario | Traveller types are defined on slide 10

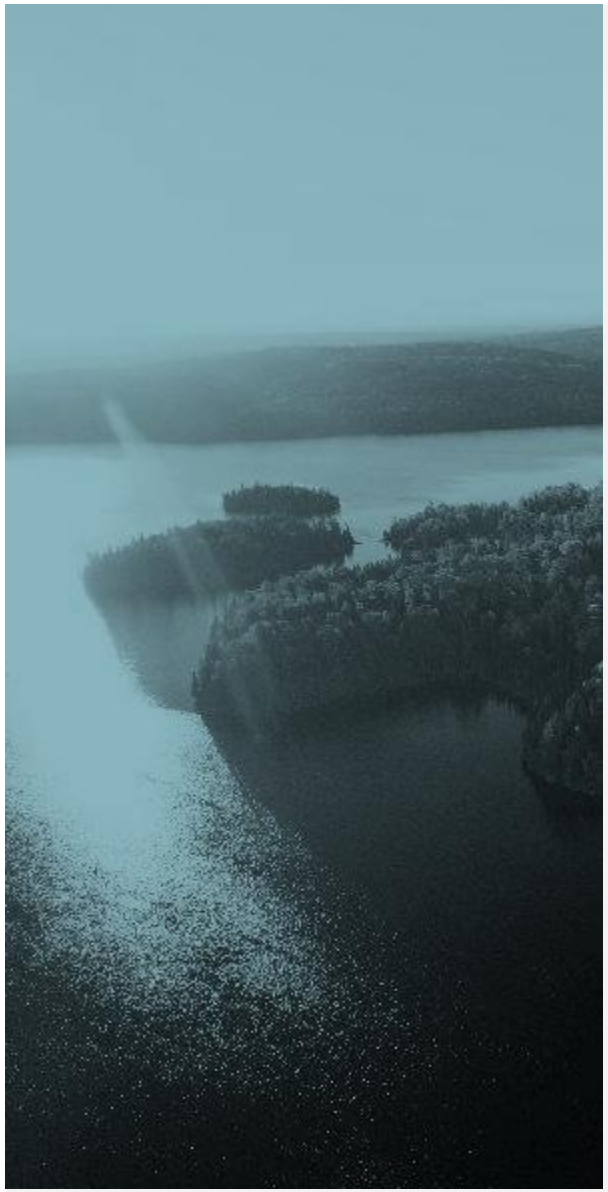
Each attribute is rated highly by every traveller type.

None of the traveller type differences are significant.

Northern Ontario has…	Overall (n=842)	Partners (n=70)	Younger Families (n=235)	Older Families (n=195)	Younger Friends (n=128)	Older Friends (n=186)
Authentic campfire and wilderness experiences	94%	92%	95%	96%	94%	95%
Excellent fishing	94%	92%	95%	96%	94%	94%
Pristine lakes and waterways	94%	91%	95%	96%	93%	93%
Remote, untouched wilderness	91%	86%	91%	94%	93%	89%
Opportunities to see the Northern Lights (Aurora Borealis)	90%	91%	91%	90%	90%	91%
Dark skies ideal for stargazing	90%	91%	90%	91%	91%	87%
Small, welcoming communities	90%	85%	89%	91%	91%	89%
Good value for money	88%	87%	89%	89%	90%	86%
Rich Indigenous culture and heritage	88%	86%	90%	92%	82%	86%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=812 to 842). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.



FUTURE DEMAND & EXPERIENCES

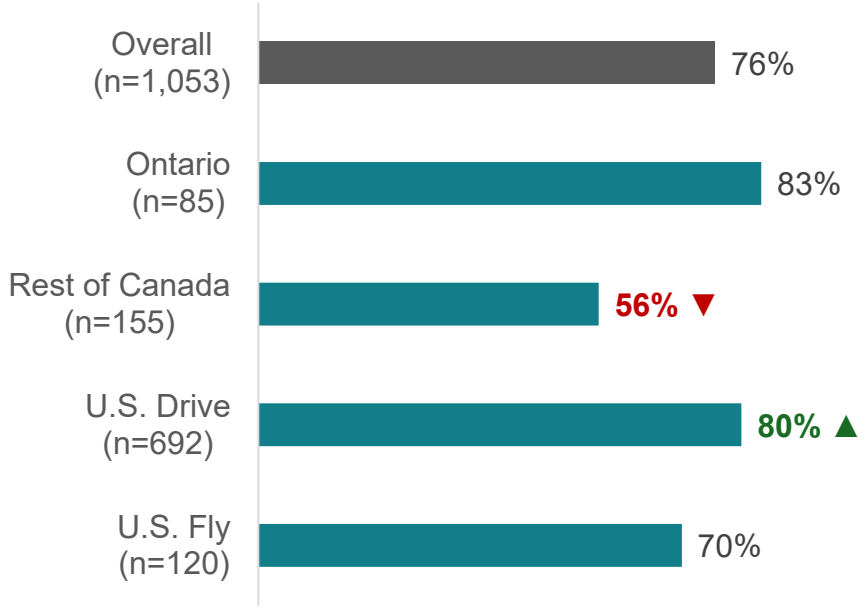
LIKELIHOOD TO VISIT NORTHERN ONTARIO IN THE NEXT 2 YEARS

All anglers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Three-quarters of anglers (76%) are likely to visit Northern Ontario for a fishing trip in the next two years, including 44% who are very likely.

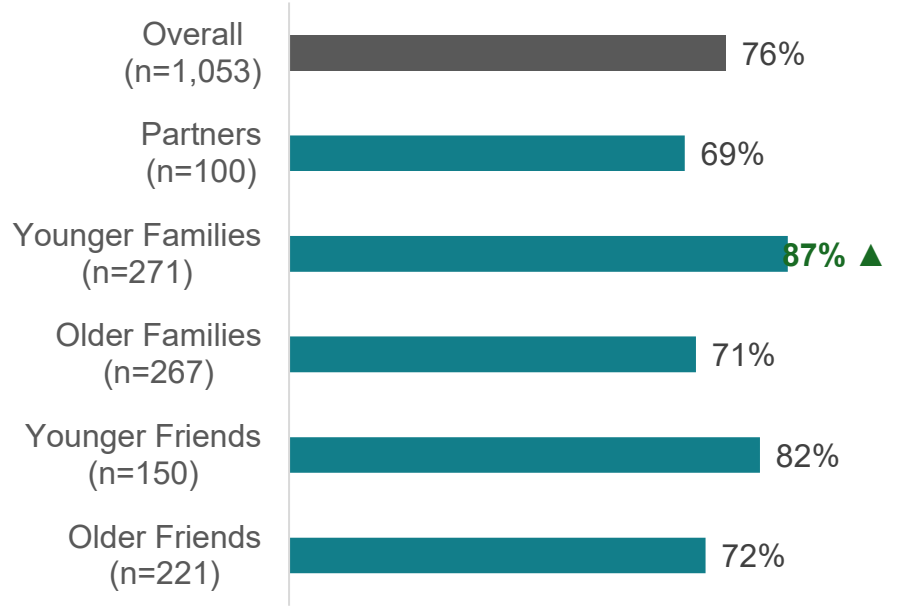
U.S. Drive anglers are more likely than other markets to visit (80%), and Rest of Canada anglers less likely (56%). Younger families are more likely than other traveller types to visit (87%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers, excluding “Don’t know” (n=1,053). N4 (TOP2) How likely are you to visit Northern Ontario for a fishing trip in the next 2 years?
TOP2 = % somewhat or very likely.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – MARKET

All anglers | Includes past visitors to Northern Ontario

Three-quarters of anglers would make Northern Ontario the only destination (29%) or the primary destination with brief stops elsewhere (48%) of a fishing trip, while a fifth (20%) see it as one of several equal destinations.

Rest of Canada anglers are more likely than other markets to see it as a secondary stop (7%).

Role of Northern Ontario	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
It would be the only destination of the trip	29%	33%	31%	28%	24%
It would be the primary destination, with brief stops elsewhere	48%	43%	37%	50%	57%
It would be one of several equal destinations	20%	21%	22%	19%	17%
It would be a secondary stop on a trip focused elsewhere	2%	1%	7% ▲	1%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). N5 If you were to visit Northern Ontario for fishing, which of the following best describes the role it would play in your trip?

“Not sure” (2%) not shown.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Making Northern Ontario the only or primary destination ranges from 68% among partners to 79% among younger families.

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
It would be the only destination of the trip	29%	24%	29%	31%	31%	25%
It would be the primary destination, with brief stops elsewhere	48%	44%	50%	46%	49%	51%
It would be one of several equal destinations	20%	26%	18%	18%	18%	21%
It would be a secondary stop on a trip focused elsewhere	2%	3%	2%	3%	1%	1%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). N5 If you were to visit Northern Ontario for fishing, which of the following best describes the role it would play in your trip?

"Not sure" (2%) not shown.

FACTORS IN DECIDING TO VISIT – MARKET (1 OF 2)

All anglers | Includes past visitors to Northern Ontario

Safety and reliability, the ability to get away from it all and access to nature (93% each) are the most important factors in deciding to visit Northern Ontario for fishing, followed by clear licensing, abundant fish stocks and quality fishing conditions (91% each) and cost (90%).

None of the market differences are significant.

Factor	Overall (n=1,066)	Ontario (n=84)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Safety and reliability of the destination	93%	89%	93%	94%	93%
Ability to get away from it all	93%	86%	93%	95%	87%
Access to nature and wilderness	93%	90%	93%	93%	93%
Licensing requirements that are clear and manageable	91%	88%	92%	92%	90%
Abundance of fish stocks (e.g., catch rates, likelihood of catching fish)	91%	86%	91%	92%	89%
Quality of fishing conditions (e.g., trophy fish potential, species diversity, lake clarity)	91%	86%	91%	91%	93%
Cost and overall affordability	90%	85%	89%	91%	86%
Quality of accommodation options	88%	82%	83%	91%	87%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,057 to 1,066). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for fishing? (flattened) TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – MARKET (2 OF 2)

All anglers | Includes past visitors to Northern Ontario

Travel time (87%) and reputation (86%) also matter to most anglers, while fewer rate companion activities (75%), connectivity (74%), outfitters (67%), Indigenous experiences (64%) or fishing events (48%) as important.

U.S. Drive anglers place more importance than other markets on companion activities, outfitters, Indigenous experiences and fishing events (52% to 79%), and Ontario anglers less on reputation, companion activities, outfitters and Indigenous experiences (43% to 71%).

Factor	Overall (n=1,066)	Ontario (n=84)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Travel time and ease of access	87%	78%	88%	88%	85%
Strong reputation or positive word of mouth	86%	71% ▼	87%	87%	86%
Availability of activities for non-fishing travel companions	75%	57% ▼	63% ▼	79% ▲	78%
Cell phone or internet connectivity at the destination	74%	73%	67%	76%	74%
Availability of outfitters, guides, or operators	67%	43% ▼	60%	71% ▲	72%
Indigenous cultural experiences	64%	43% ▼	40% ▼	71% ▲	69%
Fishing events or competitions	48%	39%	36%	52% ▲	48%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,057 to 1,066). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for fishing? (flattened) TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – TRAVELLER TYPE (1 OF 2)

All anglers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Partners place less importance than other traveller types on clear licensing requirements (78%).

Apart from this, none of the traveller type differences on this slide are significant.

Factor	Overall (n=1,066)	Partners (n=101)	Younger Families (n=275)	Older Families (n=271)	Younger Friends (n=150)	Older Friends (n=224)
Safety and reliability of the destination	93%	86%	95%	94%	91%	96%
Ability to get away from it all	93%	86%	93%	94%	91%	96%
Access to nature and wilderness	93%	86%	94%	93%	96%	94%
Licensing requirements that are clear and manageable	91%	78% ▼	93%	94%	90%	95%
Abundance of fish stocks (e.g., catch rates, likelihood of catching fish)	91%	83%	93%	92%	90%	94%
Quality of fishing conditions (e.g., trophy fish potential, species diversity, lake clarity)	91%	86%	93%	90%	94%	93%
Cost and overall affordability	90%	86%	90%	90%	86%	93%
Quality of accommodation options	88%	83%	91%	90%	91%	85%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,057 to 1,066). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for fishing? (flattened) TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – TRAVELLER TYPE (2 OF 2)

All anglers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Younger families place more importance than other traveller types on activities for companions (83%), connectivity (82%), outfitters (75%), Indigenous experiences (72%) and fishing events (60%).

Factor	Overall (n=1,066)	Partners (n=101)	Younger Families (n=275)	Older Families (n=271)	Younger Friends (n=150)	Older Friends (n=224)
Travel time and ease of access	87%	81%	90%	90%	85%	85%
Strong reputation or positive word of mouth	86%	77%	88%	87%	87%	85%
Availability of activities for non-fishing travel companions	75%	65%	83% ▲	75%	72%	71%
Cell phone or internet connectivity at the destination	74%	72%	82% ▲	72%	73%	70%
Availability of outfitters, guides, or operators	67%	55%	75% ▲	66%	69%	62%
Indigenous cultural experiences	64%	52%	72% ▲	63%	60%	62%
Fishing events or competitions	48%	38%	60% ▲	44%	53%	38%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers, excluding “Don’t know”; bases vary by item (n=1,057 to 1,066). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for fishing? (flattened) TOP2 = % somewhat or very important.

PREFERRED ACCESS TYPES – MARKET

All anglers

Most anglers prefer road-accessible areas (86%), while 46% would consider remote boat-in access, 27% fly-in or float plane access and 16% train-in access.

U.S. Fly anglers are more open than other markets to fly-in access (41%), while Ontario anglers are less open to fly-in (12%) and Rest of Canada anglers to boat-in access (30%).

Access type	Overall (n=1,023)	Ontario (n=83)	Rest of Canada (n=154)	U.S. Drive (n=668)	U.S. Fly (n=118)
Road-accessible areas	86%	89%	86%	86%	88%
Remote boat-in access	46%	37%	30% ▼	49%	56%
Fly-in or float plane access	27%	12% ▼	21%	28%	41% ▲
Train-in access	16%	8%	12%	18%	18%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,023). N7 For a fishing trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (4%) not shown.

PREFERRED ACCESS TYPES – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families (56%) and younger friend groups (60%) are more open than other traveller types to remote boat-in access, and older families less open (37%). Younger families are also more open to train-in access (23%).

Access type	Overall (n=1,023)	Partners (n=97)	Younger Families (n=265)	Older Families (n=261)	Younger Friends (n=146)	Older Friends (n=212)
Road-accessible areas	86%	80%	88%	86%	88%	86%
Remote boat-in access	46%	34%	56% ▲	37% ▼	60% ▲	43%
Fly-in or float plane access	27%	23%	32%	22%	31%	23%
Train-in access	16%	20%	23% ▲	12%	14%	14%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,023). N7 For a fishing trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (4%) not shown.

PREFERRED LODGING OPTIONS – MARKET

All anglers

Drive-in lodges or resorts and commercial cottages or cabin rentals (44% each) are the most preferred lodging options for fishing trips, followed by hotels or motels and private cottages (42% each), designated campgrounds (40%) and AirBnB (39%).

Rest of Canada anglers are less likely than other markets to prefer drive-in lodges (32%) and hotels or motels (25%), and U.S. Drive anglers less likely to prefer staying with friends or relatives (14%).

Lodging option	Overall (n=1,055)	Ontario (n=85)	Rest of Canada (n=160)	U.S. Drive (n=691)	U.S. Fly (n=119)
Drive-in lodge or resort	44%	46%	32% ▼	47%	42%
Commercial cottage or cabin rental	44%	42%	45%	43%	48%
Hotel or motel	42%	43%	25% ▼	45%	50%
Private cottage (owned or borrowed)	42%	53%	43%	41%	38%
Designated campground (private or provincial park)	40%	39%	39%	39%	46%
AirBnB	39%	48%	28%	40%	44%
Backcountry or wilderness camping	35%	30%	31%	35%	45%
Home of friends or relatives (unpaid)	17%	24%	25%	14% ▼	19%
Fly-in or remote outpost camp	14%	8%	16%	14%	19%

Note: Respondents may see AirBnB, commercial cottage or cabin rentals and private cottages as overlapping.

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,055). N8 Which of the following lodging options would you prefer on a fishing trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

PREFERRED LODGING OPTIONS – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer AirBnB (47%).

Older friend groups are the most likely to prefer designated campgrounds (48%) and commercial cottages (49%), although these differences are not significant.

Lodging option	Overall (n=1,055)	Partners (n=100)	Younger Families (n=272)	Older Families (n=270)	Younger Friends (n=149)	Older Friends (n=220)
Drive-in lodge or resort	44%	46%	47%	37%	43%	48%
Commercial cottage or cabin rental	44%	43%	45%	41%	42%	49%
Hotel or motel	42%	34%	49%	44%	40%	34%
Private cottage (owned or borrowed)	42%	41%	45%	40%	39%	45%
Designated campground (private or provincial park)	40%	34%	45%	37%	36%	48%
AirBnB	39%	37%	47% ▲	37%	47%	31%
Backcountry or wilderness camping	35%	23%	39%	31%	37%	41%
Home of friends or relatives (unpaid)	17%	12%	22%	13%	20%	18%
Fly-in or remote outpost camp	14%	15%	17%	12%	17%	13%

Note: Respondents may see AirBnB, commercial cottage or cabin rentals and private cottages as overlapping.

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,055). N8 Which of the following lodging options would you prefer on a fishing trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

WHAT WOULD ENCOURAGE LONGER STAYS – MARKET (1 OF 2)

Anglers who have visited Northern Ontario in the past 5 years

Better value for money (40%) and more things for travel companions to do (39%) are the leading factors that would encourage past-five-year visitors to spend more nights in Northern Ontario, followed by quality paid accommodation (29%), better connectivity and improved access infrastructure (26% each).

None of the market differences are significant.

Factor	Overall (n=536)	Ontario (n=71)	Rest of Canada (n=73)	U.S. Drive (n=337)	U.S. Fly (n=55)
Better value for money overall	40%	29%	29%	43%	47%
More things to do beyond fishing for my travel companions	39%	31%	28%	41%	50%
Better availability of quality paid accommodation (lodges, hotels, cottages)	29%	26%	20%	30%	40%
Better cell or internet connectivity	26%	21%	18%	27%	37%
Improved road, trail, or water access infrastructure	26%	17%	27%	26%	37%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=536). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. “Not sure” (1%) not shown.

WHAT WOULD ENCOURAGE LONGER STAYS – MARKET (2 OF 2)

Anglers who have visited Northern Ontario in the past 5 years

A quarter would stay longer for more packaged experiences (26%), and about a fifth for a guided multi-stop itinerary (21%), Indigenous cultural experiences (20%) or events timed to their travel (19%). Only 15% are already satisfied with the length of their stays.

U.S. Drive visitors are more likely than other markets to want Indigenous cultural experiences (24%), and Ontario and Rest of Canada visitors less likely (4% each).

Factor	Overall (n=536)	Ontario (n=71)	Rest of Canada (n=73)	U.S. Drive (n=337)	U.S. Fly (n=55)
More packaged or all-inclusive experiences	26%	24%	11%	29%	32%
A guided multi-stop itinerary combining activities or sub-regions	21%	17%	14%	21%	31%
Indigenous cultural experiences	20%	4% ▼	4% ▼	24% ▲	35%
Events or competitions timed to my travel	19%	11%	15%	20%	30%
Nothing – I am already satisfied with the length of my stays	15%	15%	26%	14%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=536). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. “Not sure” (1%) not shown.

WHAT WOULD ENCOURAGE LONGER STAYS – TRAVELLER TYPE (1 OF 2)

Anglers who have visited Northern Ontario in the past 5 years | Traveller types are defined on slide 10

Younger friend groups are the most likely to want quality paid accommodation (42%), although traveller type differences on this slide are not significant.

None of the traveller type differences are significant.

Factor	Overall (n=536)	Partners (n=50)	Younger Families (n=165)	Older Families (n=126)	Younger Friends (n=77)	Older Friends (n=100)
Better value for money overall	40%	34%	45%	39%	36%	34%
More things to do beyond fishing for my travel companions	39%	44%	44%	35%	42%	34%
Better availability of quality paid accommodation (lodges, hotels, cottages)	29%	29%	36%	20%	42%	18%
Better cell or internet connectivity	26%	14%	33%	27%	28%	24%
Improved road, trail, or water access infrastructure	26%	27%	28%	22%	29%	27%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=536). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. “Not sure” (1%) not shown.

WHAT WOULD ENCOURAGE LONGER STAYS – TRAVELLER TYPE (2 OF 2)

Anglers who have visited Northern Ontario in the past 5 years | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to want a guided multi-stop itinerary (31%) and events timed to their travel (27%).

Factor	Overall (n=536)	Partners (n=50)	Younger Families (n=165)	Older Families (n=126)	Younger Friends (n=77)	Older Friends (n=100)
More packaged or all-inclusive experiences	26%	18%	31%	25%	28%	23%
A guided multi-stop itinerary combining activities or sub-regions	21%	12%	31% ▲	16%	21%	13%
Indigenous cultural experiences	20%	11%	23%	17%	24%	19%
Events or competitions timed to my travel	19%	21%	27% ▲	20%	16%	9%
Nothing – I am already satisfied with the length of my stays	15%	12%	13%	17%	9%	19%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=536). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. "Not sure" (1%) not shown.



BARRIERS & COMPETITION

BARRIERS TO VISITING NORTHERN ONTARIO – MARKET (1 OF 3)

All anglers | Includes past visitors to Northern Ontario

Cost is the most commonly cited barrier to visiting Northern Ontario for fishing (35%), followed by unfavourable weather (30%), wildfires and other environmental disruptions (28%), high transportation costs and expensive licensing requirements (27% each).

U.S. Drive anglers are less likely than other markets to say Northern Ontario is too far to drive (21%).

Barrier	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Cost	35%	43%	44%	32%	34%
Unfavourable weather or season timing	30%	36%	39%	28%	20%
Wildfires, flooding, or other environmental disruptions	28%	39%	35%	26%	22%
High transportation costs (gas, airfare)	27%	27%	36%	25%	23%
Expensive licensing requirements	27%	20%	33%	27%	21%
Concerns about safety	26%	27%	23%	26%	25%
Poor value for money	25%	26%	33%	23%	20%
Too far to drive	24%	35%	32%	21% ▼	23%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for fishing? Please select all that apply.

"Not sure" (5%) not shown.

"Anti-American sentiment", "Concerns about crossing the Canada-US border" and "Passport or documentation requirements" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all anglers, and significance is not shown.

Note: The survey did not specify which licensing, registration or permit requirements were meant.

BARRIERS TO VISITING NORTHERN ONTARIO – MARKET (2 OF 3)

All anglers | Includes past visitors to Northern Ontario

Each barrier on this slide is cited by about a quarter of anglers or fewer, led by insects and poor road or water access (23% each). Anti-American sentiment is cited by 19% of U.S. Drive and 20% of U.S. Fly anglers.

Ontario anglers are more likely than other markets to cite poor road or water access (37%), while U.S. Drive anglers are less likely to cite insects (19%).

Barrier	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Insects (e.g., blackflies, mosquitoes)	23%	33%	31%	19% ▼	26%
Poor road or water access	23%	37% ▲	29%	21%	15%
Complicated licensing requirements	19%	12%	24%	19%	18%
Unfamiliar or unclear regulations	18%	14%	19%	18%	20%
Limited accommodation options	17%	22%	15%	15%	22%
Lack of amenities or services at the destination	16%	21%	15%	15%	19%
Poor or unreliable cell phone or internet connectivity	16%	13%	17%	16%	13%
Anti-American sentiment	15%	–	–	19%	20%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for fishing? Please select all that apply.

"Not sure" (5%) not shown.

"Anti-American sentiment", "Concerns about crossing the Canada-US border" and "Passport or documentation requirements" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all anglers, and significance is not shown.

Note: The survey did not specify which licensing, registration or permit requirements were meant.

BARRIERS TO VISITING NORTHERN ONTARIO – MARKET (3 OF 3)

All anglers | Includes past visitors to Northern Ontario

Each remaining barrier is cited by 14% of anglers or fewer, including 9% who say they do not know enough about Northern Ontario's fishing opportunities.

None of the market differences are significant.

Barrier	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Availability of campsites	14%	16%	14%	14%	14%
Concerns about crossing the Canada-US border	14%	–	–	18%	18%
Too remote or rugged for my comfort level	12%	9%	18%	12%	9%
Passport or documentation requirements	12%	–	–	15%	15%
Difficulty finding reliable trip planning information	11%	13%	16%	11%	6%
I do not know enough about Northern Ontario's fishing opportunities	9%	1%	13%	9%	10%
Not sure the fishing quality would meet my expectations	6%	3%	7%	7%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for fishing? Please select all that apply.

"Not sure" (5%) not shown.

"Anti-American sentiment", "Concerns about crossing the Canada-US border" and "Passport or documentation requirements" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all anglers, and significance is not shown.

Note: The survey did not specify which licensing, registration or permit requirements were meant.

BARRIERS TO VISITING NORTHERN ONTARIO – TRAVELLER TYPE (1 OF 3)

All anglers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Older friend groups are more likely than other traveller types to cite unfavourable weather (41%), and younger friend groups less likely (21%) and less likely to cite expensive licensing (15%).

Older friend groups are also the most likely to cite cost (42%) and wildfires (35%), although these differences are not significant.

Barrier	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Cost	35%	36%	30%	34%	34%	42%
Unfavourable weather or season timing	30%	23%	27%	31%	21% ▼	41% ▲
Wildfires, flooding, or other environmental disruptions	28%	29%	25%	26%	22%	35%
High transportation costs (gas, airfare)	27%	23%	29%	26%	23%	32%
Expensive licensing requirements	27%	26%	25%	28%	15% ▼	35%
Concerns about safety	26%	22%	26%	28%	24%	26%
Poor value for money	25%	27%	21%	26%	18%	31%
Too far to drive	24%	29%	22%	23%	26%	26%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for fishing? Please select all that apply.

"Not sure" (5%) not shown.

"Anti-American sentiment", "Concerns about crossing the Canada-US border" and "Passport or documentation requirements" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all anglers, and significance is not shown.

Note: The survey did not specify which licensing, registration or permit requirements were meant.

BARRIERS TO VISITING NORTHERN ONTARIO – TRAVELLER TYPE (2 OF 3)

All anglers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Younger families are less likely than other traveller types to cite insects (16%).

Each other barrier on this slide is cited by about a quarter or fewer in every traveller type.

Barrier	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Insects (e.g., blackflies, mosquitoes)	23%	27%	16% ▼	26%	21%	28%
Poor road or water access	23%	22%	20%	25%	20%	25%
Complicated licensing requirements	19%	16%	17%	18%	18%	26%
Unfamiliar or unclear regulations	18%	17%	17%	16%	15%	23%
Limited accommodation options	17%	14%	14%	17%	17%	22%
Lack of amenities or services at the destination	16%	10%	15%	19%	10%	19%
Poor or unreliable cell phone or internet connectivity	16%	13%	18%	16%	15%	14%
Anti-American sentiment	15%	14%	13%	18%	13%	16%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for fishing? Please select all that apply.

"Not sure" (5%) not shown.

"Anti-American sentiment", "Concerns about crossing the Canada-US border" and "Passport or documentation requirements" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all anglers, and significance is not shown.

Note: The survey did not specify which licensing, registration or permit requirements were meant.

BARRIERS TO VISITING NORTHERN ONTARIO – TRAVELLER TYPE (3 OF 3)

All anglers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Older families are less likely than other traveller types to cite the availability of campsites (7%).

Each remaining barrier is cited by 19% or fewer in every traveller type.

Barrier	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Availability of campsites	14%	19%	16%	7% ▼	18%	19%
Concerns about crossing the Canada-US border	14%	14%	12%	16%	13%	15%
Too remote or rugged for my comfort level	12%	8%	11%	15%	7%	17%
Passport or documentation requirements	12%	9%	12%	12%	11%	15%
Difficulty finding reliable trip planning information	11%	9%	9%	11%	10%	13%
I do not know enough about Northern Ontario's fishing opportunities	9%	15%	8%	12%	7%	6%
Not sure the fishing quality would meet my expectations	6%	4%	7%	6%	6%	9%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,067). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for fishing? Please select all that apply.

"Not sure" (5%) not shown.

"Anti-American sentiment", "Concerns about crossing the Canada-US border" and "Passport or documentation requirements" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all anglers, and significance is not shown.

Note: The survey did not specify which licensing, registration or permit requirements were meant.

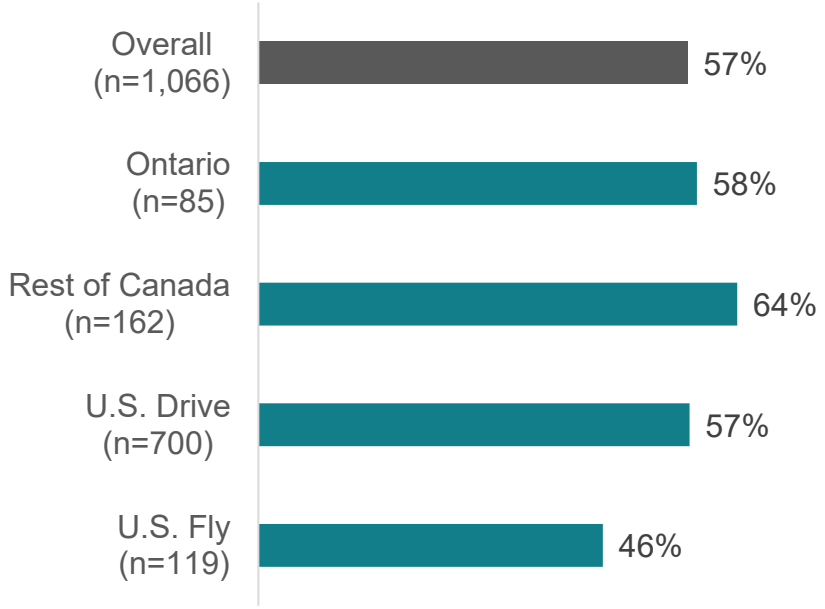
IMPACT OF FINANCIAL PRESSURES ON TRAVEL PLANS

All anglers | Traveller types are defined on slide 10

More than half of anglers (57%) agree that financial pressures have impacted their travel plans in the next 12 months, including 22% who strongly agree.

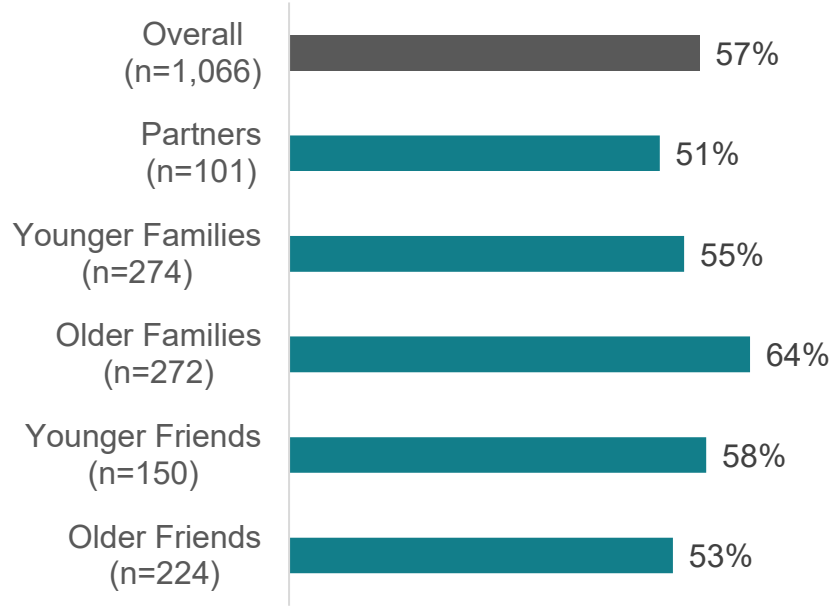
Agreement ranges from 46% among U.S. Fly anglers to 64% among Rest of Canada anglers, and from 51% among partners to 64% among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers, excluding “Don’t know” (n=1,066). BD1A (TOP2) How much do you agree or disagree with the following statement? “Financial pressures have impacted my travel plans in the next 12 months” TOP2 = % somewhat or strongly agree.

OTHER DESTINATIONS CONSIDERED – MARKET (1 OF 2)

All anglers

Michigan (45%), Wisconsin (34%) and Minnesota (30%) are the destinations anglers most often consider instead of Northern Ontario, followed by British Columbia, Pennsylvania and somewhere else in Ontario (24% each).

U.S. Drive anglers are more likely than other markets to consider Michigan (58%), Wisconsin (43%), Minnesota (38%) and Pennsylvania (30%), while Rest of Canada anglers are more likely to consider British Columbia (52%) and Ontario anglers somewhere else in Ontario (65%).

Destination	Overall (n=1,032)	Ontario (n=80)	Rest of Canada (n=158)	U.S. Drive (n=684)	U.S. Fly (n=110)
Michigan	45%	12% ▼	6% ▼	58% ▲	39%
Wisconsin	34%	2% ▼	4% ▼	43% ▲	40%
Minnesota	30%	5% ▼	6% ▼	38% ▲	34%
British Columbia	24%	28%	52% ▲	16% ▼	33%
Pennsylvania	24%	5% ▼	3% ▼	30% ▲	27%
Somewhere else in Ontario	24%	65% ▲	18%	21% ▼	21%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,032). BD2 What other destinations do you consider for fishing trips? Please select all that apply.
"Not sure" (3%) not shown.
Destinations selected by fewer than 1% of anglers are not shown.

OTHER DESTINATIONS CONSIDERED – MARKET (2 OF 2)

All anglers

A fifth of anglers consider Quebec (22%) or New York (21%), and 14% to 16% Illinois, Manitoba or Saskatchewan.

Ontario anglers are more likely than other markets to consider Quebec (51%), and Rest of Canada anglers Manitoba (38%) and Saskatchewan (22%).

Destination	Overall (n=1,032)	Ontario (n=80)	Rest of Canada (n=158)	U.S. Drive (n=684)	U.S. Fly (n=110)
Quebec	22%	51% ▲	29%	16% ▼	23%
New York	21%	9%	8% ▼	26% ▲	19%
Illinois	16%	0% ▼	2% ▼	22% ▲	14%
Manitoba	16%	13%	38% ▲	12% ▼	12%
Saskatchewan	14%	3%	22% ▲	12%	20%
Other	4%	8%	4%	4%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,032). BD2 What other destinations do you consider for fishing trips? Please select all that apply.
"Not sure" (3%) not shown.
Destinations selected by fewer than 1% of anglers are not shown.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (1 OF 2)

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to consider Michigan (56%) and Minnesota (38%), while older families are less likely to consider Wisconsin (26%) and Minnesota (22%) and younger friend groups Pennsylvania (16%).

Destination	Overall (n=1,032)	Partners (n=101)	Younger Families (n=258)	Older Families (n=266)	Younger Friends (n=146)	Older Friends (n=218)
Michigan	45%	34%	56% ▲	44%	46%	38%
Wisconsin	34%	27%	40%	26% ▼	40%	37%
Minnesota	30%	26%	38% ▲	22% ▼	32%	31%
British Columbia	24%	22%	26%	20%	24%	29%
Pennsylvania	24%	18%	26%	29%	16% ▼	22%
Somewhere else in Ontario	24%	23%	28%	24%	22%	22%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,032). BD2 What other destinations do you consider for fishing trips? Please select all that apply.
"Not sure" (3%) not shown.
Destinations selected by fewer than 1% of anglers are not shown.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (2 OF 2)

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to consider New York (27%) and Illinois (28%).

Each other destination on this slide is considered by about a fifth or fewer in every traveller type.

Destination	Overall (n=1,032)	Partners (n=101)	Younger Families (n=258)	Older Families (n=266)	Younger Friends (n=146)	Older Friends (n=218)
Quebec	22%	21%	22%	22%	23%	23%
New York	21%	18%	27% ▲	19%	20%	18%
Illinois	16%	9%	28% ▲	13%	19%	10%
Manitoba	16%	17%	18%	12%	17%	21%
Saskatchewan	14%	8%	18%	13%	14%	12%
Other	4%	6%	3%	5%	3%	5%

▲ / ▼ Significantly higher / lower than the other traveller types

Base: all anglers (n=1,032). BD2 What other destinations do you consider for fishing trips? Please select all that apply.
"Not sure" (3%) not shown.
Destinations selected by fewer than 1% of anglers are not shown.

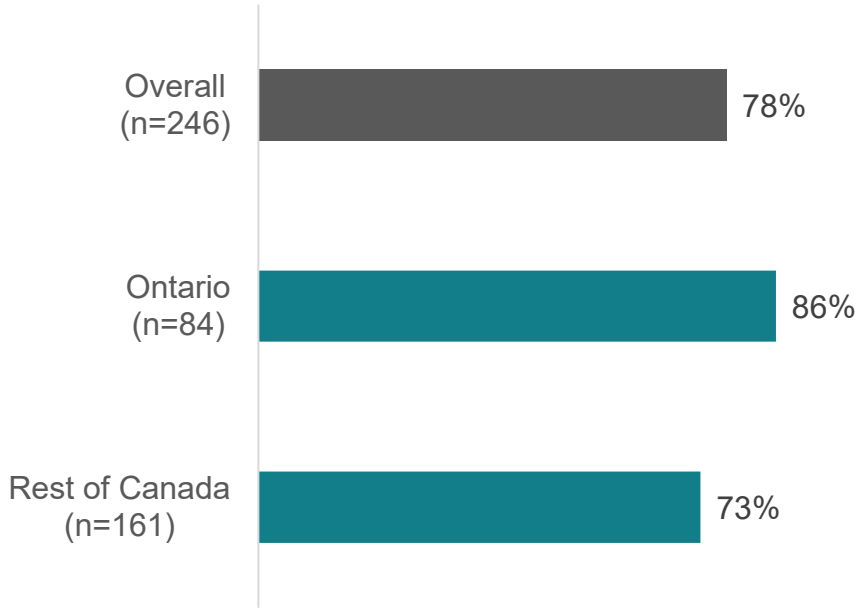
POLITICAL CLIMATE AND CHOOSING NORTHERN ONTARIO

Canadian anglers | Traveller types are defined on slide 10

Nearly eight in ten Canadian anglers (78%) are more likely to choose Northern Ontario over the United States because of the current political climate in the U.S., including 61% who strongly agree.

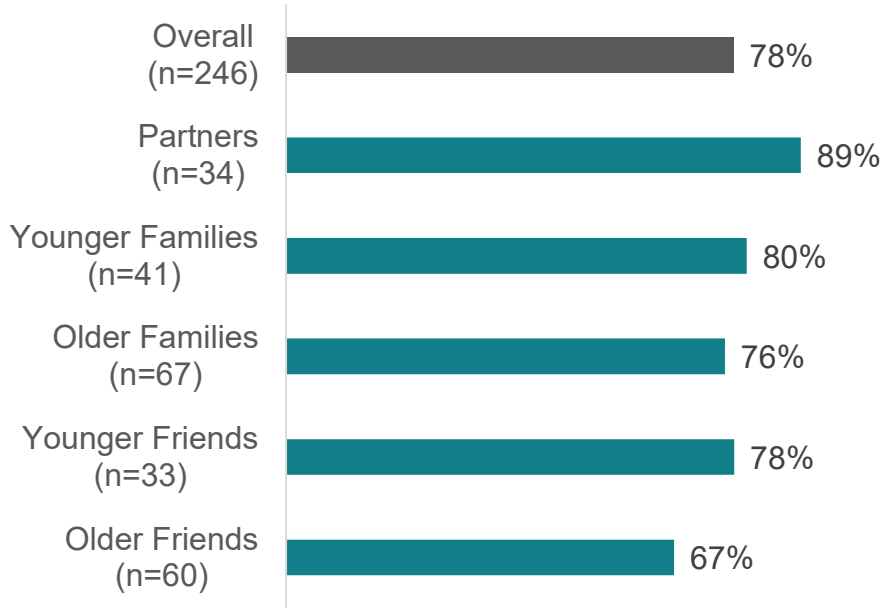
Agreement is 86% among Ontario anglers and 73% among Rest of Canada anglers, and ranges from 67% among older friend groups to 89% among partners, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: Canadian anglers, excluding “Don’t know” (n=246). BD3A (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of the current political climate in the U.S.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

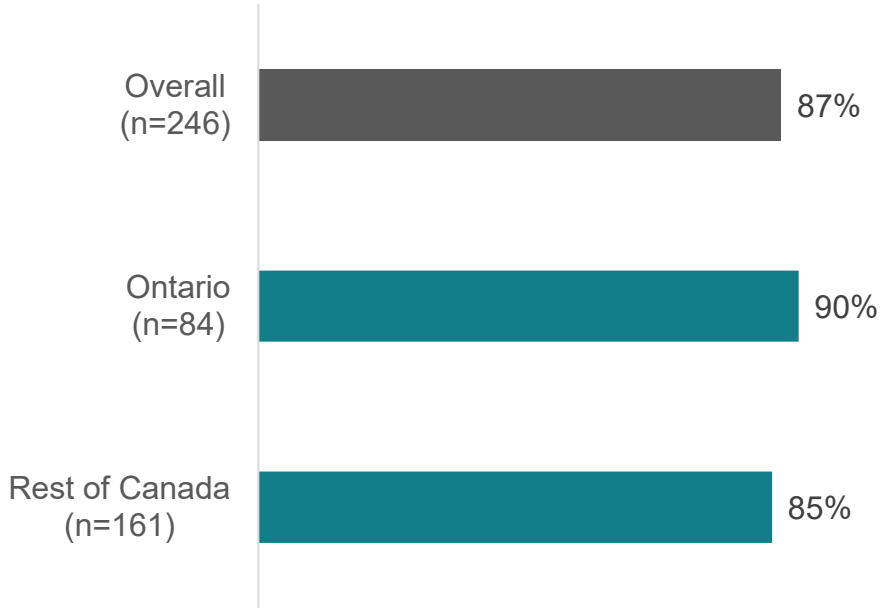
EXCHANGE RATES AND CHOOSING NORTHERN ONTARIO

Canadian anglers | Traveller types are defined on slide 10

Close to nine in ten Canadian anglers (87%) are more likely to choose Northern Ontario over the United States because of unfavourable exchange rates, including 60% who strongly agree.

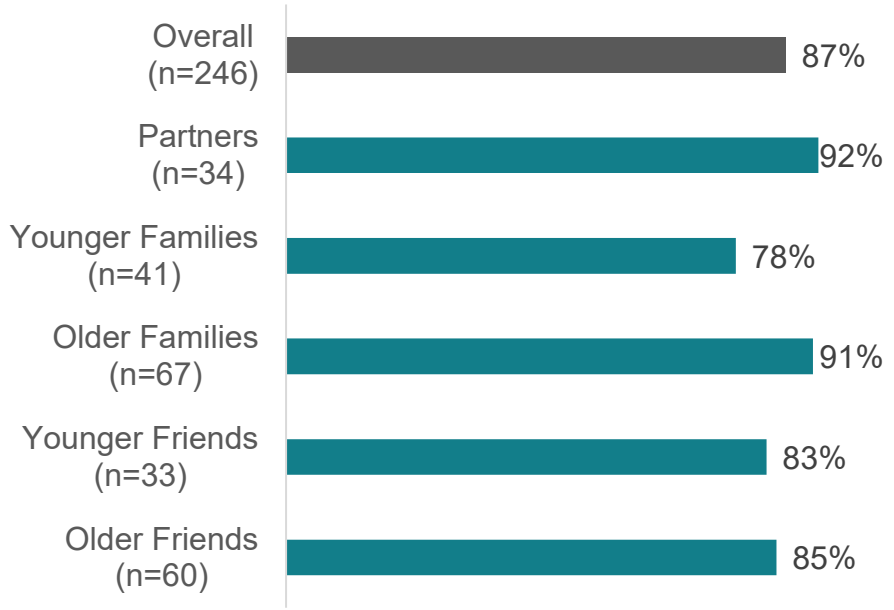
Agreement is 90% among Ontario anglers and 85% among Rest of Canada anglers, and ranges from 78% among younger families to 92% among partners, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: Canadian anglers, excluding “Don’t know” (n=246). BD3B (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of unfavourable exchange rates.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

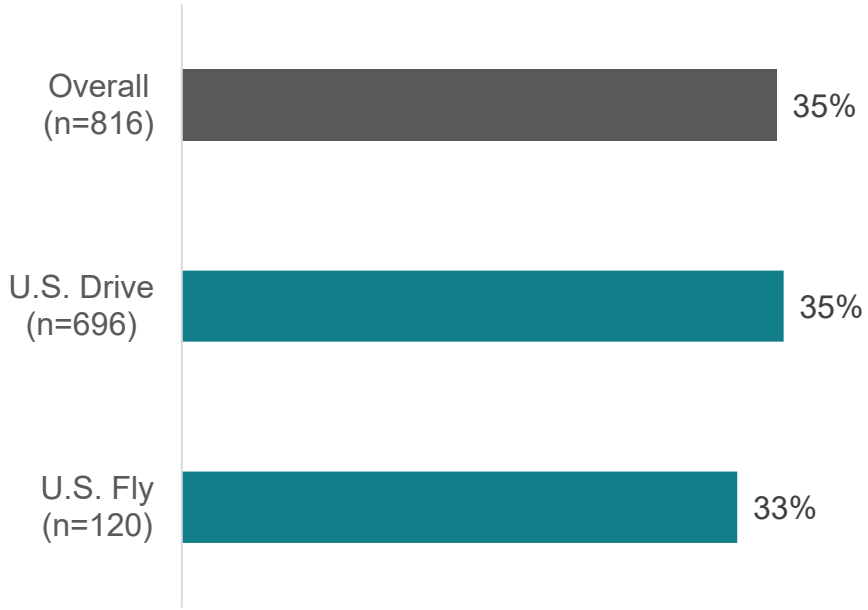
CONCERN ABOUT CROSSING THE BORDER INTO CANADA

U.S. anglers | Traveller types are defined on slide 10

A third of U.S. anglers (35%) are concerned about crossing the border to enter Canada, while half (50%) are not concerned.

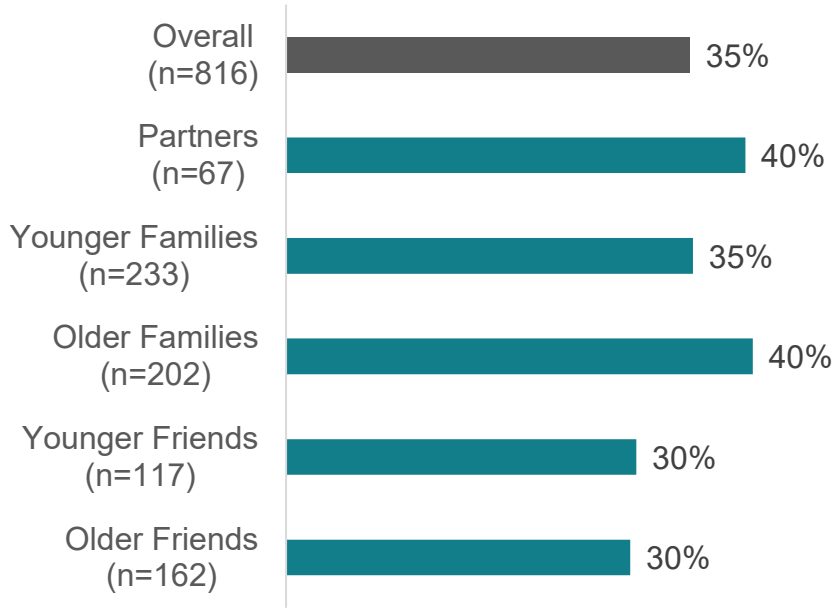
Concern is 35% among U.S. Drive anglers and 33% among U.S. Fly anglers, and ranges from 30% among younger and older friend groups to 40% among partners and older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: U.S. anglers, excluding "Don't know" (n=816). BD4A (TOP2) [I am concerned about crossing the border to enter Canada.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

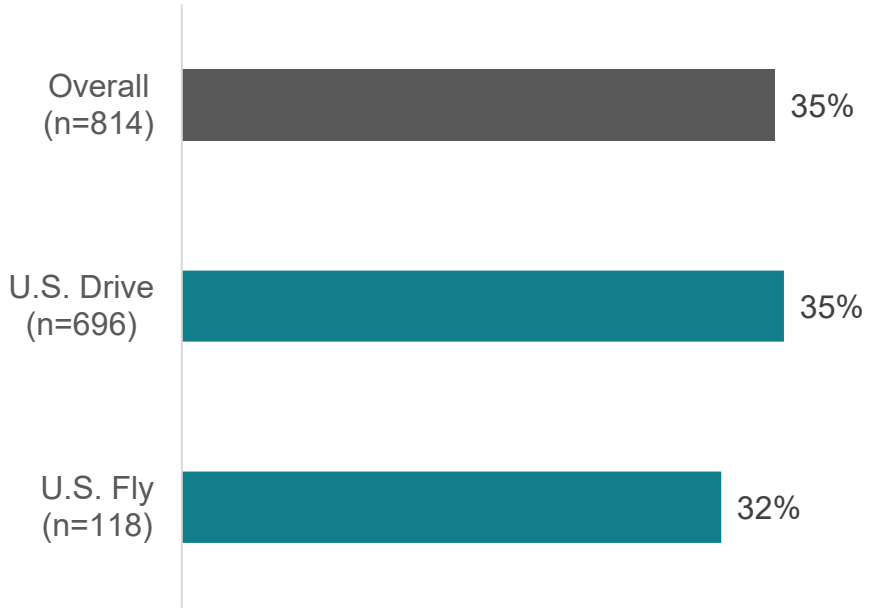
CONCERN ABOUT RETURNING TO THE U.S.

U.S. anglers | Traveller types are defined on slide 10

A third of U.S. anglers (35%) are concerned about crossing the border when returning to the U.S. from Canada, while half (49%) are not concerned.

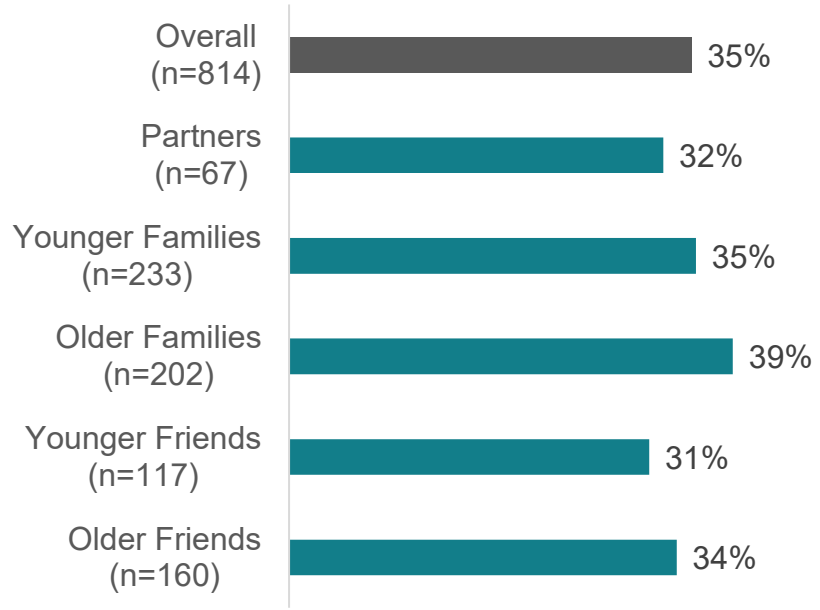
Concern is 35% among U.S. Drive anglers and 32% among U.S. Fly anglers, and ranges from 31% among younger friend groups to 39% among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ Significantly higher / lower than the other traveller types

Base: U.S. anglers, excluding "Don't know" (n=814). BD4B (TOP2) [I am concerned about crossing the border returning to the US from Canada.]
How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.