CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE I
Avid Anglers: Past Visitors 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
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 (this 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 All Anglers 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

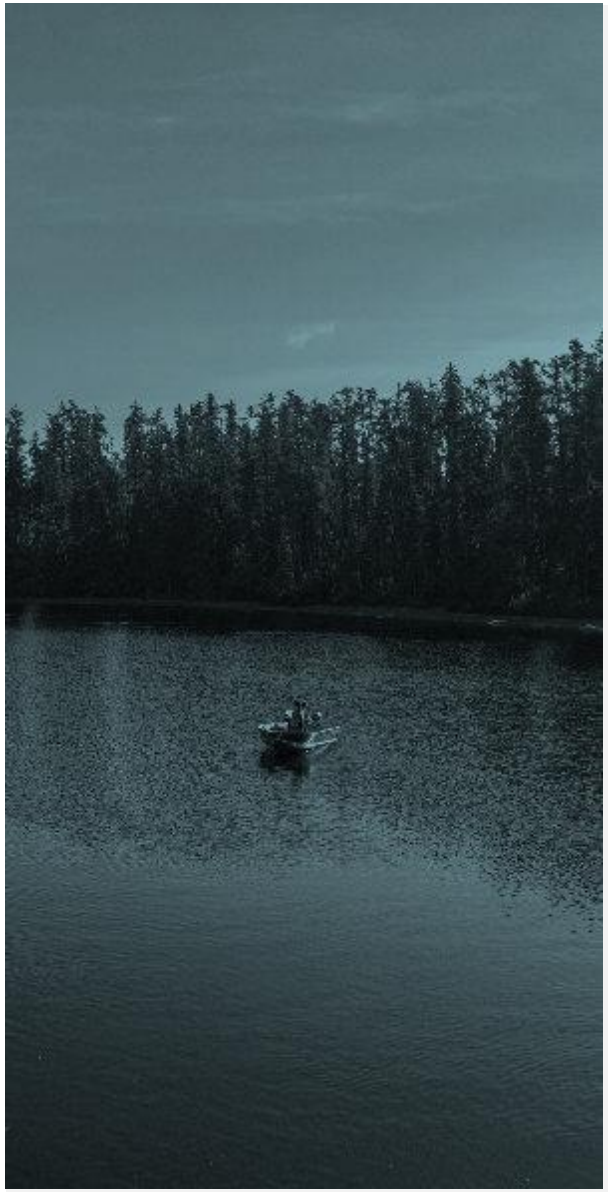
Northwest Ontario - Superior Country
e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area

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 – PAST VISITORS: WHO THEY ARE & WHAT THEY DID

PAST NORTHERN ONTARIO VISITORS - AVID ANGLERS

Half of anglers have fished in Northern Ontario in the past five years, and they are younger, family anglers. Past visitors are mostly U.S. Drive anglers (63%), followed by Rest of Canada (14%), Ontario (13%) and U.S. Fly (10%) anglers. Seven in ten (71%) have children at home, 36% are aged 35 to 44, 57% know a lot about Northern Ontario and four in ten (41%) mix guided and self-guided fishing. They take 4.4 fishing trips a year. (See slides 17–18, 52)

Their trips are summer trips, often with outfitters and paid lodging. Visitors have made an average of 3.2 fishing trips to Northern Ontario in five years, most recently in the summer (50%) or spring (26%). Their most recent trip lasted 4.1 nights with average party spending of $3,342, rising to $3,886 among U.S. Drive parties against about $1,600 to $1,900 among Canadian parties, and 68% stayed in paid roofed lodging, most often hotels or motels (28%). Close to half rented gear (46%), four in ten used a local outfitter or guide (41%) or bought a packaged experience (39%), and for half (53%) Northern Ontario was the primary and only destination. (See slides 17–18, 23, 25–26, 28–30, 32)

They rate the experience highly and would stay longer for better value and more for companions to do. Eight in ten (80%) rated their trip better than fishing elsewhere, including 47% much better, although this falls to 60% among Ontario visitors. Better value for money (40%), more things for travel companions to do (39%) and quality paid accommodation (29%) would extend their stays. (See slide 34, and slides 120–121 of the All Anglers report)



EXECUTIVE SUMMARY – PAST VISITORS: HOW THEY COMPARE WITH ALL ANGLERS

PAST NORTHERN ONTARIO VISITORS - AVID ANGLERS

Past visitors are younger family anglers, newer to the sport. They take more fishing trips a year than anglers overall (4.4 vs. 4.0), are more likely to have children at home (71% vs. 59%) and to be aged 35 to 44 (36% vs. 31%), and fewer have been fishing for more than 10 years (57% vs. 68%). They are more likely to target salmon (49% vs. 37%). (See slides 68–69)

Past visitors know the region better and see fewer barriers. More than half of past visitors (57%) know a lot about Northern Ontario, against 33% of anglers overall. They are less likely to cite cost (27% vs. 35%), high transportation costs (21% vs. 27%), expensive licensing (20% vs. 27%), complicated licensing (13% vs. 19%) and poor value for money (20% vs. 25%), while wildfire concern is similar (29% vs. 28%). (See slides 40–45, and slide 100 of the All Anglers report)

Past visitors fish with more support and plan differently. Past visitors are more likely than anglers overall to mix guided and self-guided fishing (41% vs. 33%), to value working with local operators (71% vs. 61%), and to fly to a regional hub (28% vs. 21%) or use a float plane or charter (15% vs. 9%). They rely less on word of mouth (46% vs. 56%) and are more likely to use AI to plan (70% vs. 59%). Almost all past visitors (96%) are likely to visit again, against 76% overall, and their Net Promoter Score is 61, against 39. (See slides 36, 38, 52, 54, 66, 72)



EXECUTIVE SUMMARY – SUB-REGIONAL PATTERNS

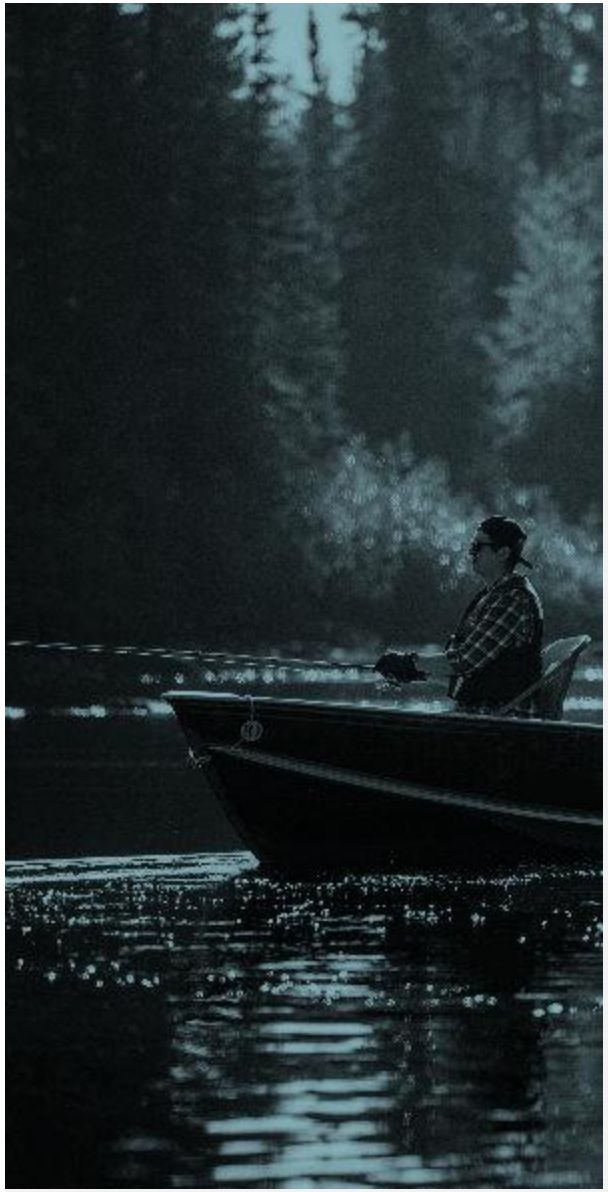
PAST NORTHERN ONTARIO VISITORS - AVID ANGLERS

Anglers spread across the five regions, and Ontario anglers stay closer to home. Between 16% and 22% of anglers have visited each region, led by Sunset Country (22%), while Ontario anglers concentrate in Northeast Ontario (54%) and The Great Canadian Wilderness (48%). Visitors to each region rate their trips similarly, with Net Promoter Scores of 58 to 71 and 80% to 84% rating their trip better than elsewhere. (See slides 21–22)

Superior Country: packaged and outfitted fishing. Superior Country visitors are more likely than past visitors overall to rent gear (55% vs. 46%), buy packaged experiences (49% vs. 39%) and target panfish (55% vs. 43%), and 47% say more things for travel companions to do would extend their stays. The practical priority is packaged products paired with companion activities.

Algoma Country: guided fishing and better access. Algoma Country visitors are more likely than past visitors overall to use a local outfitter or guide (50% vs. 41%) and to target salmon (59% vs. 49%), and a third want improved access infrastructure (33%). The practical priority is guide services and access improvements.

Northeast Ontario and The Great Canadian Wilderness: shoulder seasons and connectivity. Northeast Ontario visitors are less likely to have taken a summer trip (39% vs. 50%), spend the most per party ($3,742) and are among the most likely to want more for travel companions to do (46%). Great Canadian Wilderness visitors cite insects most (31%) and want better connectivity (34%). The practical priority is shoulder-season and companion offers in the Northeast, and connectivity in The Great Canadian Wilderness.



PAST EXPERIENCE

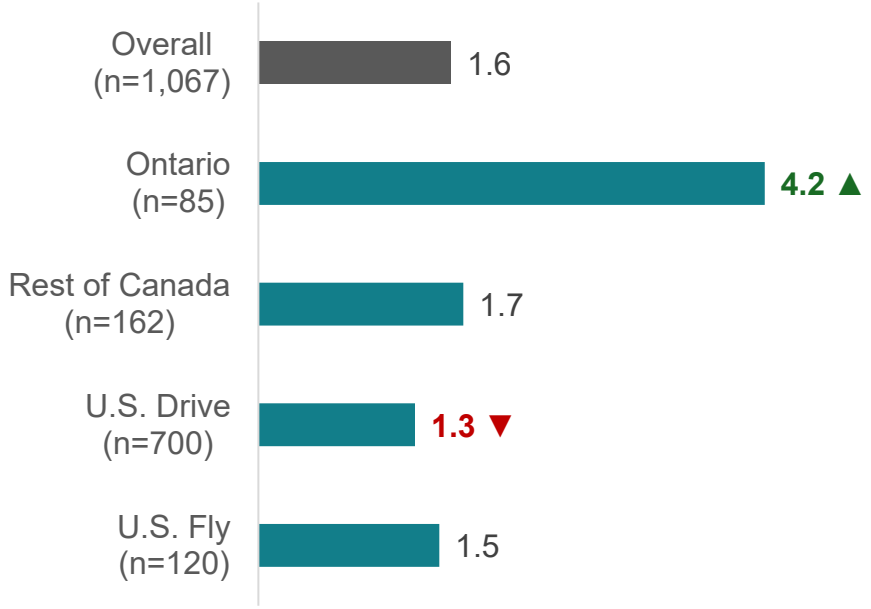
NORTHERN ONTARIO FISHING TRIPS IN THE PAST 5 YEARS

All anglers | Traveller types are defined on slide 10

Anglers have taken an average of 1.6 fishing trips to Northern Ontario in the past five years.

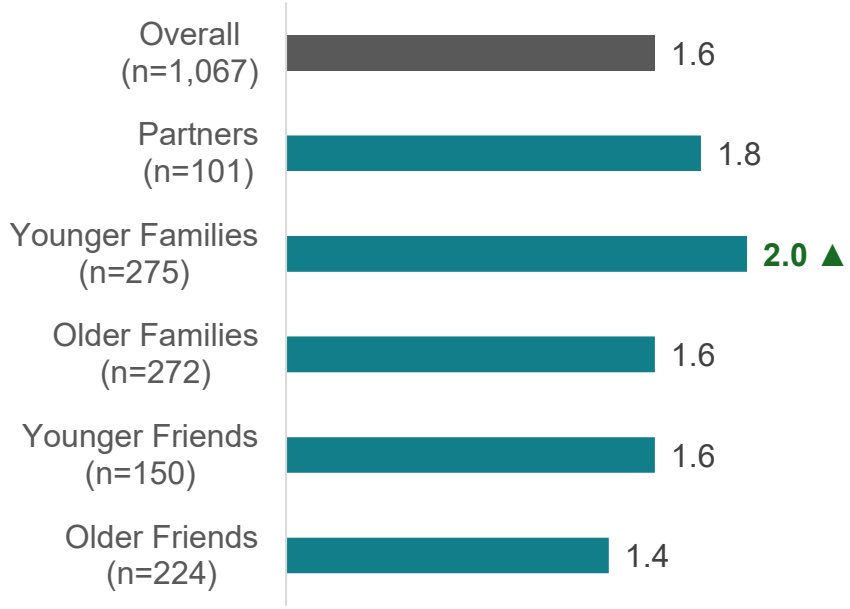
Ontario anglers have taken more trips than other markets (4.2), and U.S. Drive anglers fewer (1.3). Younger families have taken more trips than other traveller types (2.0).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all anglers (n=1,067). P1 (AVG) In the past 5 years, how many times have you visited Northern Ontario for a fishing trip? AVG = average number of trips among all anglers, including those who have not visited.

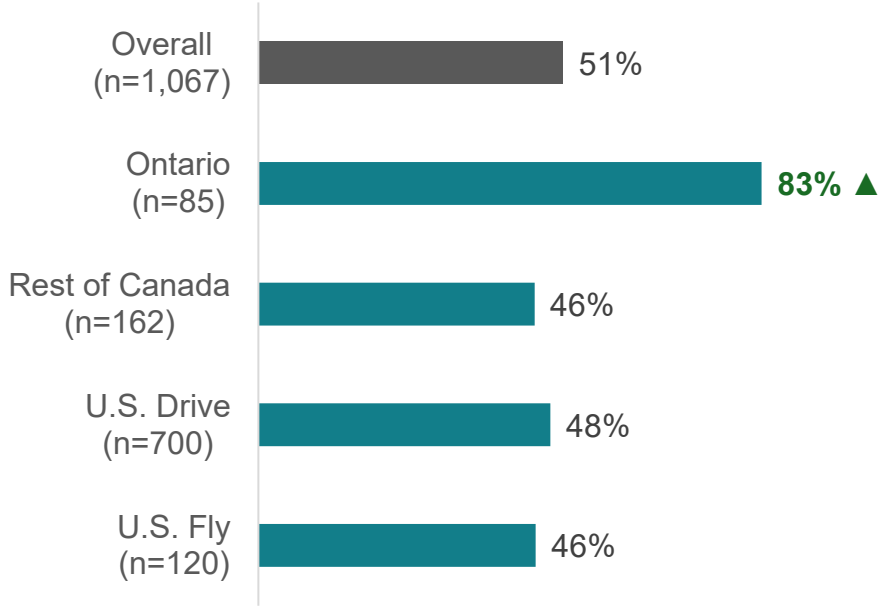
VISITED NORTHERN ONTARIO FOR FISHING IN THE PAST 5 YEARS

All anglers | Traveller types are defined on slide 10

Half of anglers (51%) have visited Northern Ontario for a fishing trip in the past five years.

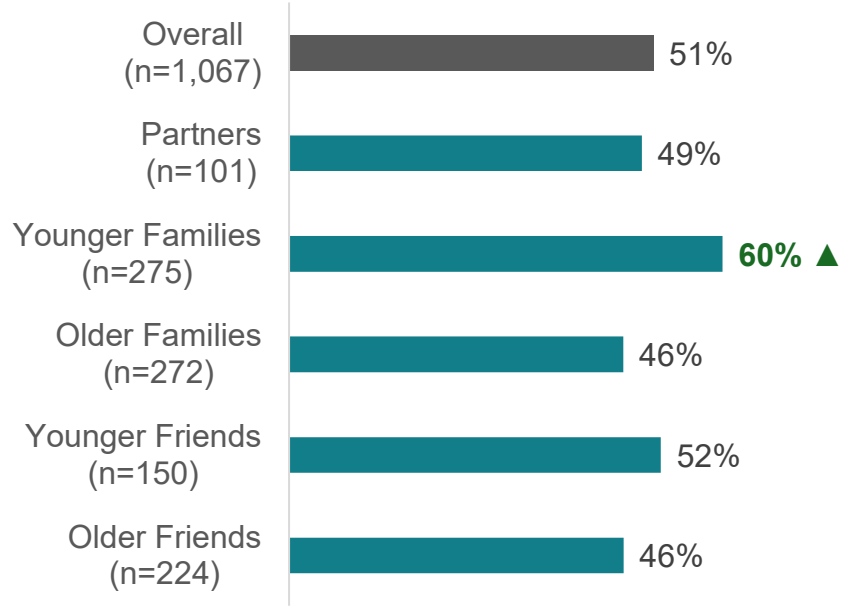
Ontario anglers are more likely than other markets to have visited (83%), and younger families more likely than other traveller types (60%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all anglers (n=1,067). P1 (NET: At least once) In the past 5 years, how many times have you visited Northern Ontario for a fishing trip? % who have visited at least once shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – MARKET

All anglers

Half of anglers (53%) take about the same number of Northern Ontario fishing trips as 10 years ago, while 22% take more and 16% fewer.

Ontario anglers are more likely than other markets to be taking more trips (37%), while Rest of Canada anglers are less likely to be taking more (11%) and more likely to be taking fewer (25%). U.S. Fly anglers are less likely to be taking fewer trips (7%).

Change in trips	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
I take more trips than I did 10 years ago	22%	37% ▲	11% ▼	23%	21%
About the same as 10 years ago	53%	46%	54%	53%	59%
I take fewer trips than I did 10 years ago	16%	15%	25% ▲	16%	7% ▼

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). P1B Compared to 10 years ago, how has your participation in fishing trips in Northern Ontario changed?

"Not sure" (9%) not shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be taking more trips (34%) and less likely to be taking fewer (12%), while older friend groups are less likely to be taking more trips (15%).

Change in trips	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
I take more trips than I did 10 years ago	22%	27%	34% ▲	17%	20%	15% ▼
About the same as 10 years ago	53%	47%	45% ▼	59%	58%	56%
I take fewer trips than I did 10 years ago	16%	15%	12% ▼	16%	15%	21%

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

Base: all anglers (n=1,067). P1B Compared to 10 years ago, how has your participation in fishing trips in Northern Ontario changed?

"Not sure" (9%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – MARKET

All anglers

About a fifth of anglers have visited each part of Northern Ontario, led by Sunset Country (22%), Superior Country and Algoma Country (20% each).

Ontario anglers are more likely than other markets to have visited Northeast Ontario (54%), The Great Canadian Wilderness (48%) and Algoma Country (32%), while Rest of Canada anglers are less likely to have visited each of these.

Region	Overall (n=1,067)	Ontario (n=85)	Rest of Canada (n=162)	U.S. Drive (n=700)	U.S. Fly (n=120)
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	22%	20%	23%	22%	24%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	20%	32% ▲	12% ▼	20%	20%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	20%	24%	14%	21%	20%
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	19%	54% ▲	11% ▼	17% ▼	17%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	16%	48% ▲	7% ▼	14% ▼	19%

▲ / ▼ Significantly higher / lower than the other markets

Base: all anglers (n=1,067). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. “Not sure” (<1%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to have visited every region (23% to 31%), and older friend groups less likely to have visited Superior Country (10%).

Region	Overall (n=1,067)	Partners (n=101)	Younger Families (n=275)	Older Families (n=272)	Younger Friends (n=150)	Older Friends (n=224)
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	22%	22%	29% ▲	19%	23%	19%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	20%	20%	29% ▲	14%	21%	17%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	20%	19%	31% ▲	16%	23%	10% ▼
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	19%	24%	25% ▲	16%	18%	13%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	16%	14%	23% ▲	14%	18%	13%

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

Base: all anglers (n=1,067). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. "Not sure" (<1%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – MARKET

Anglers who have visited Northern Ontario in the past 5 years

Half of past-five-year visitors (50%) took their most recent Northern Ontario fishing trip in the summer, followed by spring (26%), fall (15%) and winter (8%).

None of the market differences are significant.

Season	Overall (n=540)	Ontario (n=71)	Rest of Canada (n=74)	U.S. Drive (n=339)	U.S. Fly (n=55)
Winter (December – February)	8%	8%	7%	9%	8%
Spring (March – May)	26%	24%	16%	29%	27%
Summer (June – August)	50%	55%	61%	46%	52%
Fall (September – November)	15%	12%	14%	16%	13%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=540). P3 Thinking about your most recent Northern Ontario trip that involved fishing, in what season did that trip take place?

“Not sure” (<1%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – TRAVELLER TYPE

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

Summer trips range from 43% among younger friend groups to 58% among older friend groups.

None of the traveller type differences are significant.

Season	Overall (n=540)	Partners (n=50)	Younger Families (n=165)	Older Families (n=126)	Younger Friends (n=77)	Older Friends (n=104)
Winter (December – February)	8%	8%	13%	5%	10%	3%
Spring (March – May)	26%	29%	24%	28%	30%	20%
Summer (June – August)	50%	51%	50%	49%	43%	58%
Fall (September – November)	15%	12%	13%	16%	17%	19%

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

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=540). P3 Thinking about your most recent Northern Ontario trip that involved fishing, in what season did that trip take place?

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

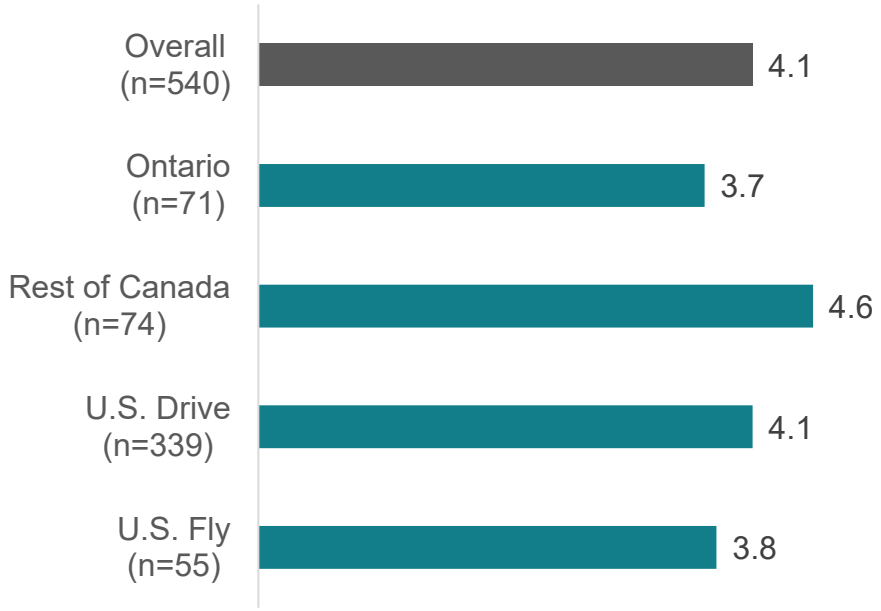
LENGTH OF MOST RECENT NORTHERN ONTARIO TRIP

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

The most recent Northern Ontario fishing trip lasted an average of 4.1 nights.

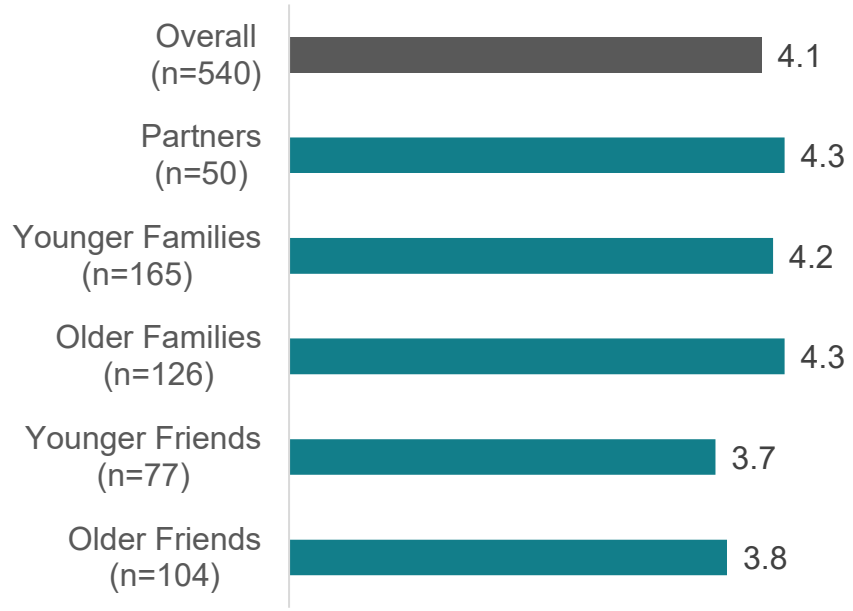
Trip length ranges from 3.7 nights among Ontario anglers and younger friend groups to 4.6 among Rest of Canada anglers, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=540). P4 (AVG) Thinking about your most recent Northern Ontario trip that involved fishing, how long was that trip (total nights away from home)? AVG = average number of nights.

ACCOMMODATION ON MOST RECENT TRIP – MARKET

Anglers who have visited Northern Ontario in the past 5 years

Hotels or motels were the most used accommodation on the most recent Northern Ontario fishing trip (28%), followed by designated campgrounds and AirBnB (22% each), commercial cottages and drive-in lodges or resorts (20% each).

Ontario visitors are less likely than other markets to have stayed in backcountry or wilderness camping (6%).

Accommodation	Overall (n=537)	Ontario (n=71)	Rest of Canada (n=73)	U.S. Drive (n=338)	U.S. Fly (n=55)
Hotel or motel	28%	15%	13%	31%	44%
Designated campground (private or provincial park)	22%	20%	20%	21%	33%
AirBnB	22%	18%	13%	24%	25%
Commercial cottage or cabin rental	20%	17%	13%	22%	27%
Drive-in lodge or resort	20%	14%	17%	22%	17%
Backcountry or wilderness camping	19%	6% ▼	15%	22%	26%
Private cottage (owned or borrowed)	19%	20%	23%	19%	15%
Home of friends or relatives (unpaid)	15%	18%	24%	12%	12%
Fly-in or remote outpost camp	9%	1%	11%	10%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=537). P5 Thinking about your most recent Northern Ontario trip that involved fishing, where did you stay on that trip? Please select all that apply.
"Not sure" (<1%) not shown.

ACCOMMODATION ON MOST RECENT TRIP – TRAVELLER TYPE

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 have stayed in a hotel or motel (39%) or an AirBnB (33%), and older friend groups less likely to have stayed in a hotel or motel (11%).

Accommodation	Overall (n=537)	Partners (n=50)	Younger Families (n=165)	Older Families (n=125)	Younger Friends (n=77)	Older Friends (n=104)
Hotel or motel	28%	29%	39% ▲	28%	28%	11% ▼
Designated campground (private or provincial park)	22%	22%	27%	12%	26%	24%
AirBnB	22%	29%	33% ▲	16%	20%	12%
Commercial cottage or cabin rental	20%	19%	25%	20%	16%	19%
Drive-in lodge or resort	20%	22%	25%	18%	13%	12%
Backcountry or wilderness camping	19%	12%	24%	12%	23%	25%
Private cottage (owned or borrowed)	19%	26%	23%	23%	14%	11%
Home of friends or relatives (unpaid)	15%	12%	17%	14%	16%	12%
Fly-in or remote outpost camp	9%	10%	11%	8%	7%	7%

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

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=537). P5 Thinking about your most recent Northern Ontario trip that involved fishing, where did you stay on that trip? Please select all that apply.
"Not sure" (<1%) not shown.

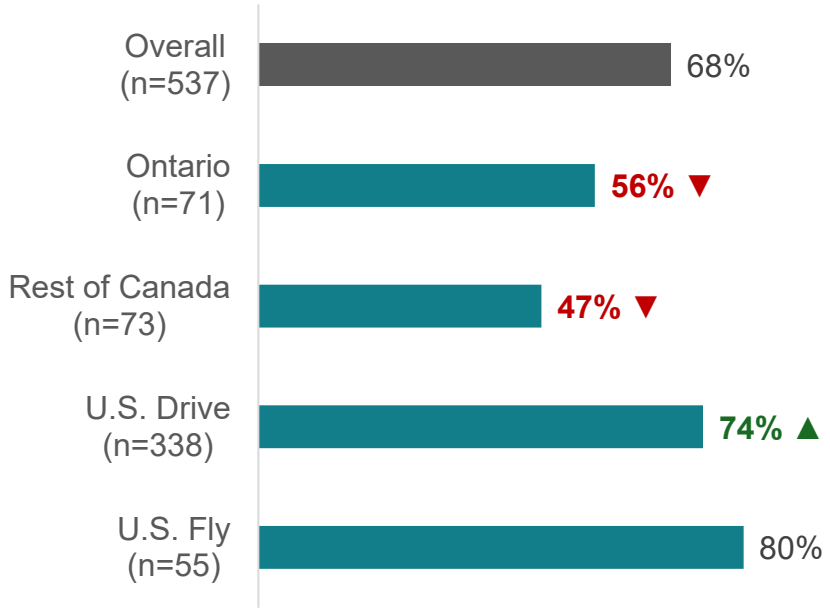
HIGH-YIELD VISITORS

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

Two-thirds of past-five-year visitors (68%) stayed in paid roofed lodging on their most recent Northern Ontario trip, making them high-yield visitors.

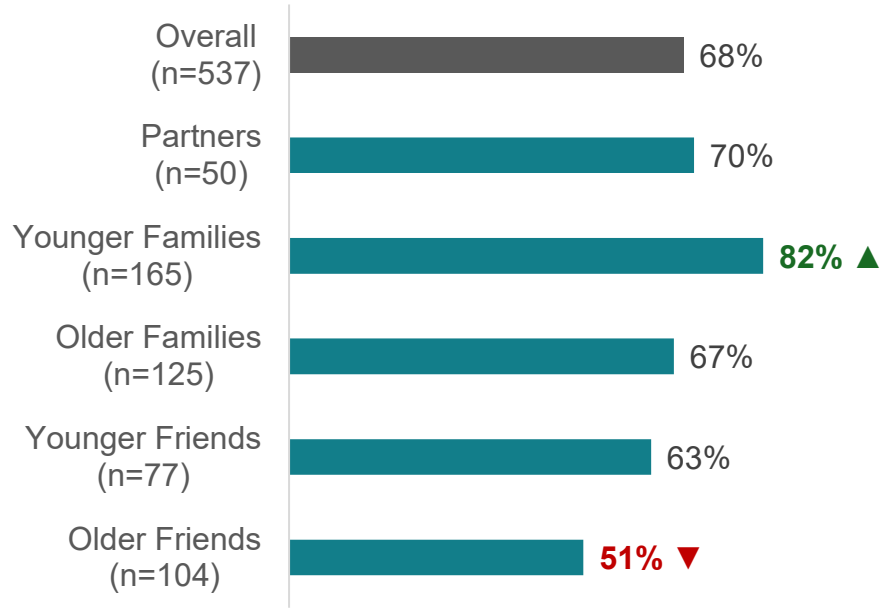
U.S. Drive visitors are more likely than other markets to be high-yield (74%), and Ontario (56%) and Rest of Canada visitors (47%) less likely. Younger families are more likely than other traveller types (82%), and older friend groups less likely (51%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=537). P5_HY Thinking about your most recent Northern Ontario trip that involved fishing, where did you stay on that trip? Please select all that apply. High-yield = stayed in a drive-in lodge or resort, fly-in or remote outpost camp, commercial cottage or cabin rental, hotel or motel, or AirBnB (P5 codes 1–5).

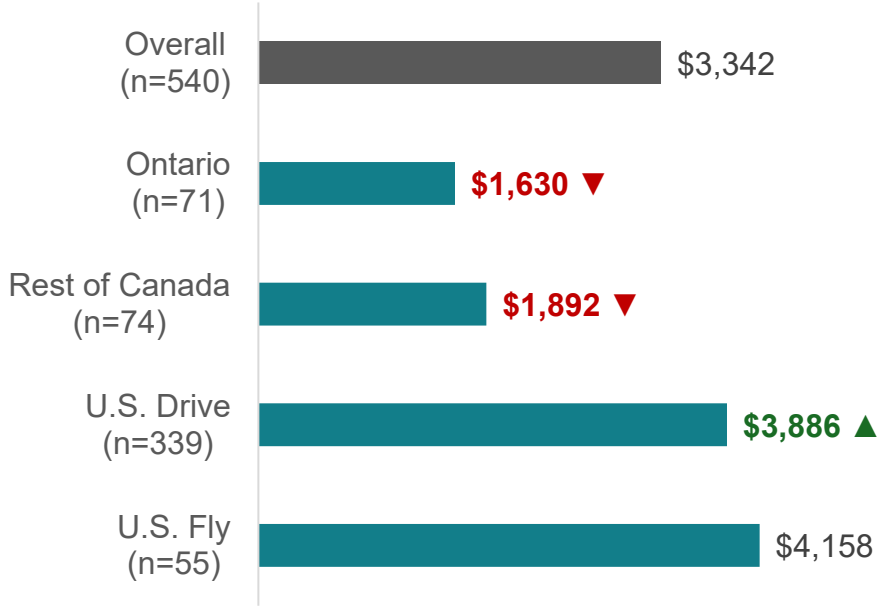
TRAVEL PARTY SPEND ON MOST RECENT NORTHERN ONTARIO TRIP

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

Travel parties spent an average of $3,342 on their most recent Northern Ontario fishing trip.

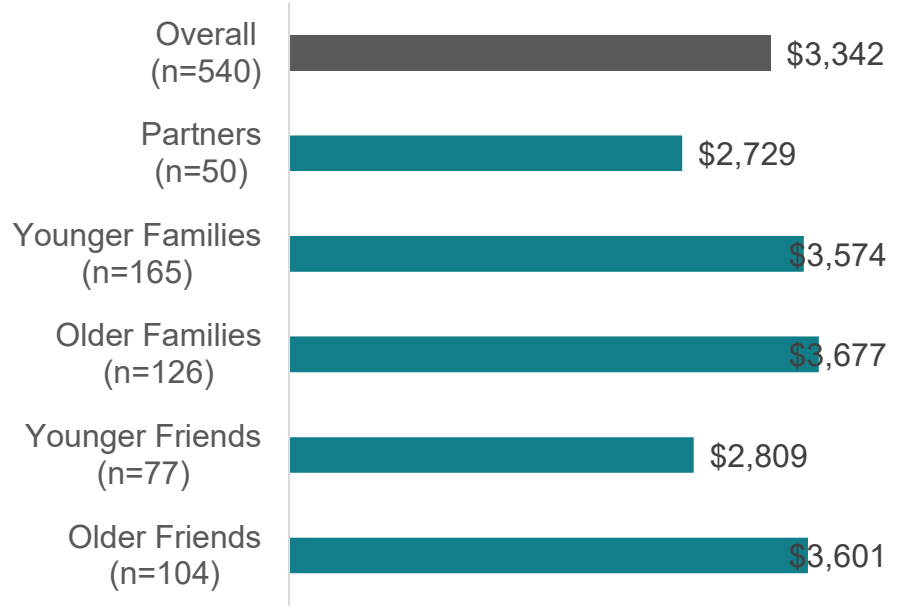
U.S. Drive parties spent more than other markets ($3,886), and Ontario ($1,630) and Rest of Canada parties ($1,892) less. Among traveller types, spending ranges from $2,729 among partners to $3,677 among older families.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=540). P6 (CAD) Approximately how much did your travel party spend in total on that Northern Ontario trip? Average total travel party spend in Canadian dollars; U.S. responses converted at 1.394.

SERVICES USED ON MOST RECENT TRIP – MARKET

Anglers who have visited Northern Ontario in the past 5 years

Close to half of past-five-year visitors rented equipment or gear (46%) on their most recent Northern Ontario fishing trip, four in ten used a local outfitter or guide (41%) or a packaged experience (39%), and 14% used a charter or float plane. A quarter (24%) used none of these.

U.S. Drive visitors are more likely than other markets to have rented gear (51%), used a local outfitter or guide (47%) or bought a packaged experience (46%), while more than half of Ontario visitors (56%) used none of these.

Service	Overall (n=540)	Ontario (n=71)	Rest of Canada (n=74)	U.S. Drive (n=339)	U.S. Fly (n=55)
Equipment or gear rental	46%	22% ▼	28% ▼	51% ▲	62% ▲
Local outfitter or guide service	41%	13% ▼	33%	47% ▲	48%
Packaged experience	39%	24% ▼	20% ▼	46% ▲	42%
Charter or float plane	14%	4% ▼	10%	16%	22%
None of the above	24%	56% ▲	37% ▲	15% ▼	15%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=540). P7 Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

SERVICES USED ON MOST RECENT TRIP – TRAVELLER TYPE

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 have rented gear (62%), used a local outfitter or guide (51%) or bought a packaged experience (56%), while older friend groups are less likely to have rented gear (32%).

Service	Overall (n=540)	Partners (n=50)	Younger Families (n=165)	Older Families (n=126)	Younger Friends (n=77)	Older Friends (n=104)
Equipment or gear rental	46%	36%	62% ▲	37%	51%	32% ▼
Local outfitter or guide service	41%	40%	51% ▲	33%	37%	37%
Packaged experience	39%	34%	56% ▲	31%	36%	29%
Charter or float plane	14%	17%	19%	15%	9%	8%
None of the above	24%	32%	11% ▼	32%	24%	30%

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

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=540). P7 Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – MARKET

Anglers who have visited Northern Ontario in the past 5 years

For half of past-five-year visitors (53%), Northern Ontario was the primary and only destination of their most recent fishing trip, and for a third (36%) the main destination with brief stops elsewhere.

None of the market differences are significant.

Role of Northern Ontario	Overall (n=540)	Ontario (n=71)	Rest of Canada (n=74)	U.S. Drive (n=339)	U.S. Fly (n=55)
Northern Ontario was our primary and only destination	53%	63%	69%	49%	47%
Northern Ontario was the main destination, with brief stops elsewhere	36%	28%	19%	40%	40%
Northern Ontario was one of several equal destinations on the trip	10%	9%	12%	9%	14%
Northern Ontario was a secondary stop on a trip focused elsewhere	1%	0%	0%	2%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=540). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

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

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – TRAVELLER TYPE

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

Older families are more likely than other traveller types to say Northern Ontario was a secondary stop (4%).

Northern Ontario was the primary and only destination for 48% to 62% of each traveller type.

Role of Northern Ontario	Overall (n=540)	Partners (n=50)	Younger Families (n=165)	Older Families (n=126)	Younger Friends (n=77)	Older Friends (n=104)
Northern Ontario was our primary and only destination	53%	60%	48%	52%	62%	52%
Northern Ontario was the main destination, with brief stops elsewhere	36%	28%	41%	30%	30%	40%
Northern Ontario was one of several equal destinations on the trip	10%	11%	10%	13%	8%	8%
Northern Ontario was a secondary stop on a trip focused elsewhere	1%	0%	<1%	4% ▲	0%	0%

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

Base: anglers who have visited Northern Ontario for fishing in the past 5 years (n=540). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

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

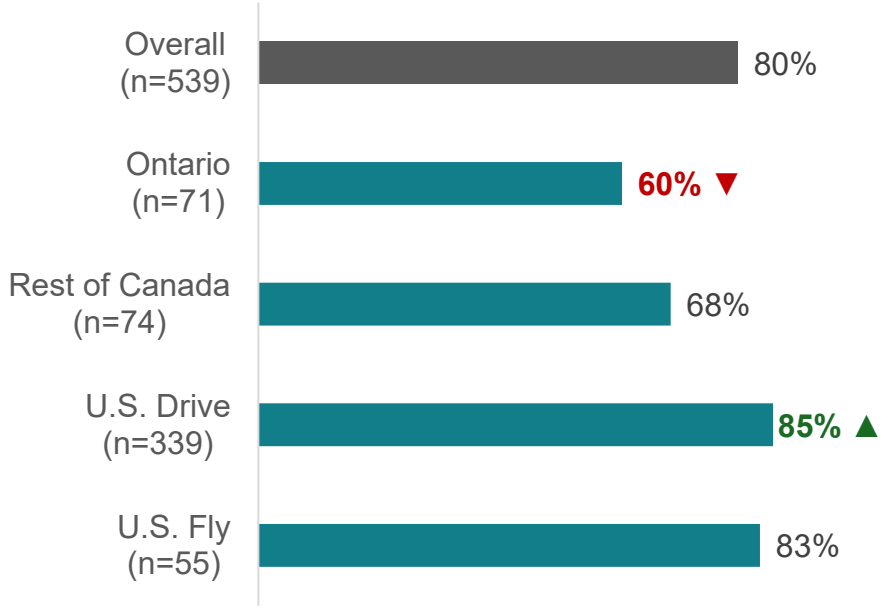
RATING OF MOST RECENT NORTHERN ONTARIO EXPERIENCE

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

Eight in ten past-five-year visitors (80%) rate their most recent Northern Ontario fishing experience as somewhat or much better than trips taken elsewhere, including 47% who rate it much better.

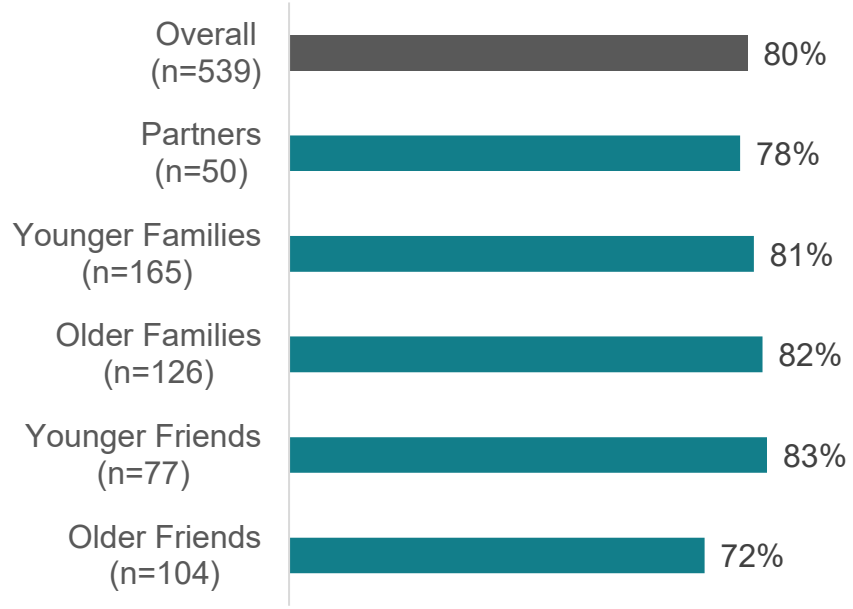
U.S. Drive visitors rate it higher than other markets (85%), and Ontario visitors lower (60%), with 39% of Ontario visitors saying it was about the same. Ratings range from 72% among older friend groups to 83% among younger friend groups.

MARKET



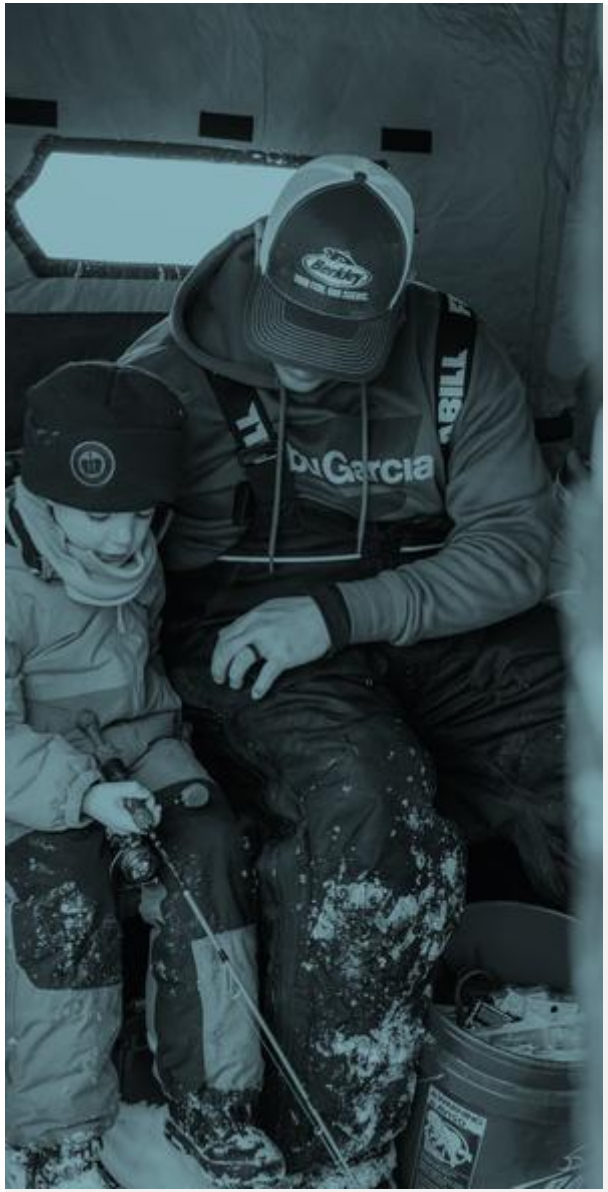
▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: anglers who have visited Northern Ontario for fishing in the past 5 years, excluding “Don’t know” (n=539). P8 (TOP2) Compared to fishing trips you have taken elsewhere, how would you rate your most recent Northern Ontario experience overall? TOP2 = % somewhat or much better.



PAST VISITORS VS. OVERALL

PAST VISITORS: LIKELIHOOD TO RECOMMEND (NPS) – MARKET

Anglers who know a lot or a little about Northern Ontario

Past visitors give Northern Ontario an NPS of 61, well above the 39 among all anglers who know the region.

Visitors are more positive than their market overall among Rest of Canada (48 vs. 12), U.S. Drive (67 vs. 47) and U.S. Fly anglers (68 vs. 34).

Measure	Overall (n=855 / 522)	Ontario (n=80 / 66)	Rest of Canada (n=123 / 71)	U.S. Drive (n=554 / 330)	U.S. Fly (n=98 / 55)
NPS score	39	31	12	47	34
	61 ▲	40	48 ▲	67 ▲	68 ▲

Know Northern Ontario (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who know a lot or a little about Northern Ontario (n=855; past visitors n=522). 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)

PAST VISITORS: LIKELIHOOD TO RECOMMEND (NPS) – TRAVELLER TYPE

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

Past visitors give Northern Ontario a higher NPS than anglers overall (61 vs. 39).

Visitors are more positive than their group overall among partners (61 vs. 35), younger families (61 vs. 44) and older families (68 vs. 47).

Measure	Overall (n=855 / 522)	Partners (n=70 / 47)	Younger Families (n=238 / 160)	Older Families (n=201 / 120)	Younger Friends (n=128 / 76)	Older Friends (n=186 / 102)
NPS score	39	35	44	47	38	27
	61 ▲	61 ▲	61 ▲	68 ▲	59 ▲	54 ▲

Know Northern Ontario (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who know a lot or a little about Northern Ontario (n=855; past visitors n=522). 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)

PAST VISITORS: LIKELIHOOD TO VISIT IN NEXT 2 YEARS – MARKET

All anglers

Almost all past visitors (96%) are likely to visit Northern Ontario for fishing in the next two years, compared with 76% of anglers overall.

Visitors are more likely than their market overall to return in every market, most notably among Rest of Canada anglers (96% vs. 56%).

Response	Overall (n=1,053 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=155 / 74)	U.S. Drive (n=692 / 339)	U.S. Fly (n=120 / 55)
Likely to visit (TOP2)	76%	83%	56%	80%	70%
	96% ▲	92% ▲	96% ▲	98% ▲	94% ▲

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers, excluding “Don’t know” (n=1,053; past visitors n=540). N4 (TOP2) How likely are you to visit Northern Ontario for a fishing trip in the next 2 years?

PAST VISITORS: LIKELIHOOD TO VISIT IN NEXT 2 YEARS – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Past visitors are more likely than anglers overall to visit in the next two years (96% vs. 76%).

Visitors are more likely than their group overall to return among partners (97% vs. 69%), older families (97% vs. 71%) and younger families (98% vs. 87%).

Response	Overall (n=1,053 / 540)	Partners (n=100 / 50)	Younger Families (n=271 / 165)	Older Families (n=267 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=221 / 104)
Likely to visit (TOP2)	76%	69%	87%	71%	82%	72%
	96% ▲	97% ▲	98% ▲	97% ▲	98% ▲	91% ▲

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers, excluding “Don’t know” (n=1,053; past visitors n=540). N4 (TOP2) How likely are you to visit Northern Ontario for a fishing trip in the next 2 years?

PAST VISITORS: BARRIERS – MARKET (1 OF 6)

All anglers

Past visitors are less likely than anglers overall to be discouraged by cost (27% vs. 35%) and high transportation costs (21% vs. 27%).

U.S. Drive visitors are less likely than their market overall to cite cost (23% vs. 32%), and Ontario visitors transportation costs (20% vs. 27%).

Barrier	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Cost	35%	43%	44%	32%	34%
	27% ▼	41%	32%	23% ▼	24%
Unfavourable weather or season timing	30%	36%	39%	28%	20%
	26%	35%	42%	23% ▼	7% ▼
Wildfires, flooding, or other environmental disruptions	28%	39%	35%	26%	22%
	29%	44%	33%	26%	24%
High transportation costs (gas, airfare)	27%	27%	36%	25%	23%
	21% ▼	20% ▼	25%	21%	20%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (2 OF 6)

All anglers

Past visitors are less likely to be discouraged by expensive licensing requirements (20% vs. 27%) and distance (18% vs. 24%).

U.S. Drive visitors are less likely than their market overall to cite expensive licensing (19% vs. 27%), and Ontario visitors poor value for money (19% vs. 26%).

Barrier	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Expensive licensing requirements	27%	20%	33%	27%	21%
	20% ▼	16%	31%	19% ▼	15%
Concerns about safety	26%	27%	23%	26%	25%
	23%	28%	22%	23%	25%
Poor value for money	25%	26%	33%	23%	20%
	20% ▼	19% ▼	31%	18% ▼	20%
Too far to drive	24%	35%	32%	21%	23%
	18% ▼	29%	22%	16%	12%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (3 OF 6)

All anglers

Past visitors are less likely to be discouraged by complicated licensing requirements (13% vs. 19%).

U.S. Drive (12% vs. 19%) and U.S. Fly visitors (7% vs. 18%) are less likely than their market overall to cite complicated licensing.

Barrier	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Insects (e.g., blackflies, mosquitoes)	23%	33%	31%	19%	26%
	22%	34%	21%	19%	27%
Poor road or water access	23%	37%	29%	21%	15%
	22%	35%	30%	18%	15%
Complicated licensing requirements	19%	12%	24%	19%	18%
	13% ▼	13%	23%	12% ▼	7% ▼
Unfamiliar or unclear regulations	18%	14%	19%	18%	20%
	15%	15%	23%	13% ▼	14%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (4 OF 6)

All anglers

Past visitors cite each barrier on this slide at a similar rate to anglers overall.

Within each market, differences between visitors and the market overall are not significant on these barriers.

Barrier	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Limited accommodation options	17%	22%	15%	15%	22%
	14%	17%	13%	12%	23%
Lack of amenities or services at the destination	16%	21%	15%	15%	19%
	14%	17%	15%	12%	16%
Poor or unreliable cell phone or internet connectivity	16%	13%	17%	16%	13%
	13%	9%	17%	13%	13%
Anti-American sentiment	15%	–	–	19%	20%
	12%	–	–	17%	13%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (5 OF 6)

All anglers

Past visitors cite each barrier on this slide at a similar rate to anglers overall.

U.S. Drive visitors are less likely than their market overall to say Northern Ontario is too remote or rugged (8% vs. 12%).

Barrier	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Availability of campsites	14%	16%	14%	14%	14%
	15%	17%	11%	15%	20%
Concerns about crossing the Canada-US border	14%	–	–	18%	18%
	11%	–	–	15%	17%
Too remote or rugged for my comfort level	12%	9%	18%	12%	9%
	9%	8%	20%	8% ▼	9%
Passport or documentation requirements	12%	–	–	15%	15%
	9%	–	–	12%	10%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (6 OF 6)

All anglers

Past visitors are less likely to say they do not know enough about Northern Ontario's fishing opportunities (2% vs. 9%) or have difficulty finding reliable planning information (7% vs. 11%).

U.S. Drive visitors are less likely than their market overall to say they do not know enough (2% vs. 9%).

Barrier	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Difficulty finding reliable trip planning information	11%	13%	16%	11%	6%
	7% ▼	9%	10%	7% ▼	6%
I do not know enough about Northern Ontario's fishing opportunities	9%	1%	13%	9%	10%
	2% ▼	0%	1% ▼	2% ▼	1% ▼
Not sure the fishing quality would meet my expectations	6%	3%	7%	7%	4%
	5%	3%	7%	5%	5%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (1 OF 6)

All anglers | Traveller types are defined on slide 10

Past visitors are less likely than anglers overall to be discouraged by cost (27% vs. 35%) and high transportation costs (21% vs. 27%).

Younger family visitors are less likely than their group overall to cite cost (22% vs. 30%), and partner visitors transportation costs (9% vs. 23%).

Barrier	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Cost	35%	36%	30%	34%	34%	42%
	27% ▼	29%	22% ▼	27%	28%	35%
Unfavourable weather or season timing	30%	23%	27%	31%	21%	41%
	26%	21%	21% ▼	27%	25%	31%
Wildfires, flooding, or other environmental disruptions	28%	29%	25%	26%	22%	35%
	29%	38%	27%	31%	19%	32%
High transportation costs (gas, airfare)	27%	23%	29%	26%	23%	32%
	21% ▼	9% ▼	25%	20%	17%	28%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (2 OF 6)

All anglers | Traveller types are defined on slide 10

Past visitors are less likely to be discouraged by expensive licensing requirements (20% vs. 27%) and distance (18% vs. 24%).

Younger family visitors are less likely than their group overall to cite expensive licensing (19% vs. 25%).

Barrier	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Expensive licensing requirements	27%	26%	25%	28%	15%	35%
	20% ▼	19%	19% ▼	19%	13%	28%
Concerns about safety	26%	22%	26%	28%	24%	26%
	23%	21%	23%	26%	26%	22%
Poor value for money	25%	27%	21%	26%	18%	31%
	20% ▼	24%	18%	22%	16%	24%
Too far to drive	24%	29%	22%	23%	26%	26%
	18% ▼	17%	17%	20%	20%	18%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (3 OF 6)

All anglers | Traveller types are defined on slide 10

Past visitors are less likely to be discouraged by complicated licensing requirements (13% vs. 19%).

Partner (2% vs. 16%) and younger family visitors (12% vs. 17%) are less likely than their group overall to cite complicated licensing.

Barrier	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Insects (e.g., blackflies, mosquitoes)	23%	27%	16%	26%	21%	28%
	22%	20%	15%	26%	29% ▲	29%
Poor road or water access	23%	22%	20%	25%	20%	25%
	22%	27%	18%	24%	24%	22%
Complicated licensing requirements	19%	16%	17%	18%	18%	26%
	13% ▼	2% ▼	12% ▼	15%	13%	19%
Unfamiliar or unclear regulations	18%	17%	17%	16%	15%	23%
	15%	18%	14%	11%	16%	18%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (4 OF 6)

All anglers | Traveller types are defined on slide 10

Past visitors cite each barrier on this slide at a similar rate to anglers overall.

Within each traveller type, differences between visitors and the group overall are not significant on these barriers.

Barrier	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Limited accommodation options	17%	14%	14%	17%	17%	22%
	14%	14%	11%	11%	19%	17%
Lack of amenities or services at the destination	16%	10%	15%	19%	10%	19%
	14%	12%	15%	16%	11%	12%
Poor or unreliable cell phone or internet connectivity	16%	13%	18%	16%	15%	14%
	13%	9%	16%	14%	16%	9%
Anti-American sentiment	15%	14%	13%	18%	13%	16%
	12%	4%	10%	13%	17%	13%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (5 OF 6)

All anglers | Traveller types are defined on slide 10

Past visitors cite each barrier on this slide at a similar rate to anglers overall.

Within each traveller type, differences between visitors and the group overall are not significant on these barriers.

Barrier	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Availability of campsites	14%	19%	16%	7%	18%	19%
	15%	20%	18%	8%	17%	18%
Concerns about crossing the Canada-US border	14%	14%	12%	16%	13%	15%
	11%	11%	11%	9%	13%	13%
Too remote or rugged for my comfort level	12%	8%	11%	15%	7%	17%
	9%	4%	8%	12%	7%	14%
Passport or documentation requirements	12%	9%	12%	12%	11%	15%
	9%	4%	9%	9%	6%	13%

All anglers (overall) | Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (6 OF 6)

All anglers | Traveller types are defined on slide 10

Past visitors are less likely to say they do not know enough about Northern Ontario's fishing opportunities (2% vs. 9%) or have difficulty finding reliable planning information (7% vs. 11%).

Partner visitors are much less likely than their group overall to say they do not know enough (1% vs. 15%).

Barrier	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Difficulty finding reliable trip planning information	11%	9%	9%	11%	10%	13%
	7% ▼	3%	6%	8%	11%	7%
I do not know enough about Northern Ontario's fishing opportunities	9%	15%	8%	12%	7%	6%
	2% ▼	1% ▼	4% ▼	2% ▼	1% ▼	0% ▼
Not sure the fishing quality would meet my expectations	6%	4%	7%	6%	6%	9%
	5%	2%	7%	8%	3%	3%

All anglers (overall) | Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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); significance is not shown for these items.

PAST VISITORS: INDEPENDENT VS. GUIDED FISHING – MARKET

All anglers

Past visitors are more likely than anglers overall to use a mix of guided and self-guided fishing (41% vs. 33%) and less likely to go fully self-guided (57% vs. 65%).

The shift toward guided fishing holds among U.S. Drive visitors (44% vs. 35% mixing guided and self-guided).

Approach	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
I mainly go on my own or with my own group – fully self-guided	65%	70%	69%	64%	64%
	57% ▼	64%	61%	55% ▼	56%
I use a mix of guided and self-guided	33%	29%	27%	35%	33%
	41% ▲	34%	35%	44% ▲	40%
I mainly use guided or outfitted experiences provided by operators	2%	1%	3%	1%	3%
	2%	1%	4%	1%	3%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). T6 When you go on a fishing trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (<1%) not shown.

PAST VISITORS: INDEPENDENT VS. GUIDED FISHING – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Past visitors are more likely than anglers overall to use a mix of guided and self-guided fishing (41% vs. 33%).

Younger family visitors are more likely than their group overall to mix guided and self-guided fishing (48% vs. 43%).

Approach	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
I mainly go on my own or with my own group – fully self-guided	65%	78%	55%	69%	57%	75%
	57% ▼	68%	49% ▼	60%	50%	67%
I use a mix of guided and self-guided	33%	19%	43%	30%	41%	23%
	41% ▲	26%	48% ▲	39%	48%	33% ▲
I mainly use guided or outfitted experiences provided by operators	2%	3%	2%	1%	1%	2%
	2%	6%	3%	1%	1%	0%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). T6 When you go on a fishing trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (<1%) not shown.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (1 OF 4)

All anglers

Past visitors are less likely than anglers overall to rely on word of mouth (46% vs. 56%).

U.S. Drive visitors are less likely than their market overall to rely on word of mouth (40% vs. 53%).

Source	Overall (n=1,046 / 529)	Ontario (n=84 / 70)	Rest of Canada (n=156 / 70)	U.S. Drive (n=686 / 333)	U.S. Fly (n=119 / 55)
Word of mouth (e.g., friends or family)	56%	70%	64%	53%	50%
	46% ▼	67%	60%	40% ▼	39%
General internet search (e.g., Google, Bing)	51%	53%	52%	50%	52%
	49%	48%	49%	48%	54%
Social media content (e.g., Instagram, Facebook, YouTube)	38%	29%	32%	40%	46%
	40%	26%	39%	41%	50%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	30%	21%	33%	42%
	33%	31%	18%	34%	49%
Official tourism websites (e.g., national, provincial, state, regional, city)	30%	24%	28%	30%	34%
	30%	27%	26%	31%	31%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,046; past visitors n=529). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (2 OF 4)

All anglers

Past visitors are more likely than anglers overall to use AI tools (28% vs. 23%).

U.S. Fly visitors are more likely than their market overall to use AI tools (47% vs. 31%).

Source	Overall (n=1,046 / 529)	Ontario (n=84 / 70)	Rest of Canada (n=156 / 70)	U.S. Drive (n=686 / 333)	U.S. Fly (n=119 / 55)
TV shows or documentaries	25%	26%	19%	26%	29%
	26%	26%	28%	24%	35%
Outdoor or sporting magazines or publications	24%	15%	17%	26%	29%
	25%	16%	20%	26%	31%
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	17%	14%	25%	31%
	28% ▲	19%	15%	29%	47% ▲
Travel information centres or visitor centres	23%	17%	23%	24%	23%
	25%	20%	20%	26%	32%
Outfitter or lodge websites	23%	14%	25%	23%	25%
	23%	17%	21%	23%	31%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,046; past visitors n=529). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (3 OF 4)

All anglers

Past visitors use each source on this slide at a similar rate to anglers overall.

U.S. Drive visitors are more likely than their market overall to use specialized apps (15% vs. 11%).

Source	Overall (n=1,046 / 529)	Ontario (n=84 / 70)	Rest of Canada (n=156 / 70)	U.S. Drive (n=686 / 333)	U.S. Fly (n=119 / 55)
Articles, blogs, or videos about travel destinations	22%	14%	16%	23%	27%
	23%	14%	21%	24%	30%
Magazines, travel guides or brochures	21%	15%	14%	23%	23%
	22%	11%	14%	23%	35%
Forums or online communities	18%	18%	15%	18%	25%
	19%	18%	18%	19%	26%
Social media influencers	17%	13%	10%	19%	24%
	20%	14%	14%	21%	31%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	11%	9%	8%	11%	19%
	14%	11%	7%	15% ▲	18%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,046; past visitors n=529). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (4 OF 4)

All anglers

Past visitors are more likely than anglers overall to use travel phone lines (12% vs. 8%) and travel agents (11% vs. 8%).

U.S. Drive visitors are more likely than their market overall to use both (12% to 13% vs. 8%).

Source	Overall (n=1,046 / 529)	Ontario (n=84 / 70)	Rest of Canada (n=156 / 70)	U.S. Drive (n=686 / 333)	U.S. Fly (n=119 / 55)
Consumer shows/exhibitions	10%	6%	12%	10%	10%
	12%	8%	11%	13%	16%
Travel-related phone lines or hotlines	8%	6%	6%	8%	11%
	12% ▲	8%	6%	12% ▲	22%
Travel agents	8%	5%	7%	8%	9%
	11% ▲	6%	7%	13% ▲	15%
Email newsletters	6%	6%	11%	5%	7%
	9%	5%	19%	7%	9%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,046; past visitors n=529). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (1 OF 4)

All anglers | Traveller types are defined on slide 10

Past visitors are less likely than anglers overall to rely on word of mouth (46% vs. 56%).

Younger family visitors are less likely than their group overall to rely on word of mouth (38% vs. 48%).

Source	Overall (n=1,046 / 529)	Partners (n=99 / 50)	Younger Families (n=270 / 161)	Older Families (n=266 / 124)	Younger Friends (n=144 / 74)	Older Friends (n=223 / 104)
Word of mouth (e.g., friends or family)	56%	49%	48%	59%	58%	65%
	46% ▼	36%	38% ▼	49%	52%	57%
General internet search (e.g., Google, Bing)	51%	53%	53%	46%	48%	57%
	49%	53%	50%	41%	49%	52%
Social media content (e.g., Instagram, Facebook, YouTube)	38%	28%	47%	29%	45%	43%
	40%	38%	46%	27%	45%	45%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	25%	41%	28%	31%	31%
	33%	34%	41%	26%	34%	29%
Official tourism websites (e.g., national, provincial, state, regional, city)	30%	25%	34%	25%	23%	34%
	30%	30%	33%	25%	24%	32%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,046; past visitors n=529). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (2 OF 4)

All anglers | Traveller types are defined on slide 10

Past visitors are more likely than anglers overall to use AI tools (28% vs. 23%).

Within each traveller type, differences between visitors and the group overall are not significant on these sources.

Source	Overall (n=1,046 / 529)	Partners (n=99 / 50)	Younger Families (n=270 / 161)	Older Families (n=266 / 124)	Younger Friends (n=144 / 74)	Older Friends (n=223 / 104)
TV shows or documentaries	25%	28%	25%	21%	25%	29%
	26%	31%	25%	22%	24%	27%
Outdoor or sporting magazines or publications	24%	20%	27%	24%	21%	25%
	25%	21%	27%	26%	23%	22%
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	20%	27%	21%	29%	22%
	28% ▲	29%	31%	26%	31%	22%
Travel information centres or visitor centres	23%	18%	24%	20%	19%	31%
	25%	18%	28%	27%	16%	28%
Outfitter or lodge websites	23%	15%	25%	24%	16%	26%
	23%	9%	25%	22%	16%	29%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,046; past visitors n=529). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (3 OF 4)

All anglers | Traveller types are defined on slide 10

Past visitors use each source on this slide at a similar rate to anglers overall.

Within each traveller type, differences between visitors and the group overall are not significant on these sources.

Source	Overall (n=1,046 / 529)	Partners (n=99 / 50)	Younger Families (n=270 / 161)	Older Families (n=266 / 124)	Younger Friends (n=144 / 74)	Older Friends (n=223 / 104)
Articles, blogs, or videos about travel destinations	22%	21%	27%	18%	23%	22%
	23%	27%	25%	17%	27%	24%
Magazines, travel guides or brochures	21%	20%	19%	21%	15%	24%
	22%	16%	20%	22%	19%	26%
Forums or online communities	18%	11%	23%	15%	21%	20%
	19%	11%	21%	17%	21%	22%
Social media influencers	17%	9%	27%	13%	24%	11%
	20%	10%	32%	16%	25%	10%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	11%	8%	15%	6%	10%	12%
	14%	16%	20%	7%	13%	10%

All anglers (overall) | Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,046; past visitors n=529). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (4 OF 4)

All anglers | Traveller types are defined on slide 10

Past visitors are more likely than anglers overall to use travel phone lines (12% vs. 8%) and travel agents (11% vs. 8%).

Younger family visitors are more likely than their group overall to use travel phone lines (16% vs. 11%).

Source	Overall (n=1,046 / 529)	Partners (n=99 / 50)	Younger Families (n=270 / 161)	Older Families (n=266 / 124)	Younger Friends (n=144 / 74)	Older Friends (n=223 / 104)
Consumer shows/exhibitions	10%	16%	10%	7%	10%	13%
	12%	12%	13%	9%	13%	17%
Travel-related phone lines or hotlines	8%	4%	11%	8%	6%	6%
	12% ▲	9%	16% ▲	13%	11%	5%
Travel agents	8%	5%	12%	7%	7%	6%
	11% ▲	8%	14%	11%	12%	8%
Email newsletters	6%	6%	8%	4%	7%	8%
	9%	11%	11%	5%	8%	9%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,046; past visitors n=529). 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.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (1 OF 2)

Anglers who use social media to plan

Past visitors who use social media are more likely than social media users overall to use Instagram (65% vs. 55%) and TikTok (51% vs. 44%).

U.S. Drive visitors are more likely than their market overall to use Instagram (66% vs. 54%) and Reddit (43% vs. 35%), and U.S. Fly visitors Instagram (91% vs. 76%).

Platform	Overall (n=477 / 253)	Ontario* (n=32 / 25)	Rest of Canada (n=57 / 32)	U.S. Drive (n=325 / 163)	U.S. Fly (n=64 / 34)
YouTube	80%	79%	78%	80%	85%
	84%	78%	74%	85%	93%
Facebook	72%	71%	75%	71%	72%
	73%	66%	77%	73%	79%
Instagram	55%	53%	43%	54%	76%
	65% ▲	52%	40%	66% ▲	91% ▲
TikTok	44%	32%	33%	45%	57%
	51% ▲	33%	46%	51%	73%
Reddit	33%	29%	19%	35%	36%
	37%	37%	8%	43% ▲	39%

Social media users (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who use social media to plan (B4) (n=477; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (2 OF 2)

Anglers who use social media to plan

Past visitors are also more likely to use X (44% vs. 33%) and WhatsApp (26% vs. 17%).

U.S. Drive visitors are more likely than their market overall to use X (49% vs. 35%) and WhatsApp (28% vs. 17%), and U.S. Fly visitors WhatsApp (42% vs. 22%).

Platform	Overall (n=477 / 253)	Ontario* (n=32 / 25)	Rest of Canada (n=57 / 32)	U.S. Drive (n=325 / 163)	U.S. Fly (n=64 / 34)
X (formerly known as Twitter)	33%	16%	20%	35%	39%
	44% ▲	20%	28%	49% ▲	53%
Pinterest	18%	17%	17%	16%	27%
	21%	21%	13%	21%	32%
WhatsApp	17%	19%	11%	17%	22%
	26% ▲	20%	2%	28% ▲	42% ▲
Snapchat	15%	12%	7%	15%	26%
	21% ▲	15%	12%	20% ▲	38%
Threads	7%	2%	0%	8%	11%
	9%	3%	0%	11%	13%

Social media users (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who use social media to plan (B4) (n=477; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (1 OF 2)

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

Past visitors who use social media are more likely than social media users overall to use Instagram (65% vs. 55%) and TikTok (51% vs. 44%).

Older family visitors are more likely than their group overall to use Instagram (68% vs. 47%) and TikTok (52% vs. 35%).

Platform	Overall (n=477 / 253)	Partners* (n=32 / 22)	Younger Families (n=153 / 94)	Older Families (n=96 / 48)	Younger Friends (n=80 / 38)	Older Friends (n=102 / 48)
YouTube	80%	83%	81%	77%	78%	86%
	84%	85%	84%	80%	83%	89%
Facebook	72%	67%	78%	80%	56%	70%
	73%	74%	77%	77%	63%	71%
Instagram	55%	37%	66%	47%	60%	47%
	65% ▲	49%	71%	68% ▲	69%	51%
TikTok	44%	40%	56%	35%	47%	33%
	51% ▲	51%	62%	52% ▲	51%	31%
Reddit	33%	23%	37%	22%	43%	32%
	37%	30%	43%	30%	39%	33%

Social media users (overall) | Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who use social media to plan (B4) (n=477; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (2 OF 2)

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

Past visitors are also more likely to use X (44% vs. 33%) and WhatsApp (26% vs. 17%).

Younger family visitors are more likely than their group overall to use X (48% vs. 38%) and WhatsApp (27% vs. 19%), and older family visitors X (47% vs. 30%).

Platform	Overall (n=477 / 253)	Partners* (n=32 / 22)	Younger Families (n=153 / 94)	Older Families (n=96 / 48)	Younger Friends (n=80 / 38)	Older Friends (n=102 / 48)
X (formerly known as Twitter)	33%	24%	38%	30%	37%	26%
	44% ▲	31%	48% ▲	47% ▲	41%	41%
Pinterest	18%	20%	17%	13%	18%	24%
	21%	25%	20%	19%	19%	26%
WhatsApp	17%	10%	19%	22%	15%	14%
	26% ▲	14%	27% ▲	29%	27% ▲	21%
Snapchat	15%	11%	22%	12%	14%	11%
	21% ▲	16%	25%	21%	19%	17%
Threads	7%	5%	12%	6%	6%	2%
	9%	7%	16%	7%	9%	0%

Social media users (overall) | Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who use social media to plan (B4) (n=477; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – MARKET

All anglers

Past visitors are more likely than anglers overall to use AI tools to plan their next fishing trip (70% vs. 59%).

U.S. Fly (89% vs. 63%) and U.S. Drive visitors (75% vs. 64%) are more likely than their market overall to use AI tools.

Response	Overall (n=1,063 / 538)	Ontario (n=84 / 70)	Rest of Canada (n=162 / 74)	U.S. Drive (n=697 / 338)	U.S. Fly (n=120 / 55)
Likely to use AI tools (TOP2)	59%	49%	40%	64%	63%
	70% ▲	51%	49%	75% ▲	89% ▲

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers, excluding “Don’t know” (n=1,063; past visitors n=538). 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?

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Past visitors are more likely than anglers overall to use AI tools to plan (70% vs. 59%).

Visitors are more likely than their group overall to use AI tools among partners (60% vs. 45%) and younger families (83% vs. 74%).

Response	Overall (n=1,063 / 538)	Partners (n=100 / 50)	Younger Families (n=273 / 165)	Older Families (n=272 / 126)	Younger Friends (n=149 / 77)	Older Friends (n=224 / 104)
Likely to use AI tools (TOP2)	59%	45%	74%	59%	65%	47%
	70% ▲	60% ▲	83% ▲	71% ▲	70%	49%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers, excluding “Don’t know” (n=1,063; past visitors n=538). 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?

PAST VISITORS: FISH SPECIES TARGETED – MARKET (1 OF 2)

All anglers

Past visitors target the fish species on this slide at a similar rate to anglers overall.

Within each market, differences between visitors and the market overall are not significant on these species.

Fish type	Overall (n=1,061 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=161 / 74)	U.S. Drive (n=695 / 339)	U.S. Fly (n=120 / 55)
Bass (largemouth or smallmouth)	72%	71%	37%	79%	78%
	74%	69%	46%	79%	83%
Trout (lake, brook, rainbow)	70%	72%	67%	69%	74%
	72%	73%	61%	73%	78%
Walleye	47%	51%	54%	50%	19%
	49%	50%	61%	49%	30%
Panfish (perch, crappie, bluegill)	44%	30%	11%	55%	37%
	43%	27%	15%	52%	49%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,061; past visitors n=540). 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.

PAST VISITORS: FISH SPECIES TARGETED – MARKET (2 OF 2)

All anglers

Past visitors are more likely than anglers overall to target salmon (49% vs. 37%).

U.S. Fly visitors are more likely than their market overall to target salmon (67% vs. 47%) and northern pike (39% vs. 26%), and U.S. Drive visitors salmon (50% vs. 36%).

Fish type	Overall (n=1,061 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=161 / 74)	U.S. Drive (n=695 / 339)	U.S. Fly (n=120 / 55)
Northern pike	38%	38%	47%	38%	26%
	42%	43%	53%	40%	39% ▲
Salmon	37%	45%	27%	36%	47%
	49% ▲	49%	27%	50% ▲	67% ▲
Muskellunge	10%	11%	7%	10%	13%
	12%	12%	11%	11%	22%

All anglers (overall)

Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,061; past visitors n=540). 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.

PAST VISITORS: FISH SPECIES TARGETED – TRAVELLER TYPE (1 OF 2)

All anglers | Traveller types are defined on slide 10

Past visitors target the fish species on this slide at a similar rate to anglers overall.

Within each traveller type, differences between visitors and the group overall are not significant on these species.

Fish type	Overall (n=1,061 / 540)	Partners (n=100 / 50)	Younger Families (n=273 / 165)	Older Families (n=272 / 126)	Younger Friends (n=148 / 77)	Older Friends (n=224 / 104)
Bass (largemouth or smallmouth)	72%	59%	77%	69%	69%	76%
	74%	63%	79%	74%	70%	73%
Trout (lake, brook, rainbow)	70%	67%	75%	72%	68%	67%
	72%	72%	77%	76%	67%	68%
Walleye	47%	52%	46%	52%	41%	47%
	49%	49%	47%	52%	44%	55%
Panfish (perch, crappie, bluegill)	44%	45%	48%	43%	47%	36%
	43%	38%	49%	37%	49%	36%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,061; past visitors n=540). 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.

PAST VISITORS: FISH SPECIES TARGETED – TRAVELLER TYPE (2 OF 2)

All anglers | Traveller types are defined on slide 10

Past visitors are more likely than anglers overall to target salmon (49% vs. 37%).

Visitors are more likely than their group overall to target salmon among partners (50% vs. 28%), younger families (59% vs. 50%) and older families (39% vs. 27%).

Fish type	Overall (n=1,061 / 540)	Partners (n=100 / 50)	Younger Families (n=273 / 165)	Older Families (n=272 / 126)	Younger Friends (n=148 / 77)	Older Friends (n=224 / 104)
Northern pike	38%	33%	35%	39%	41%	40%
	42%	32%	42% ▲	42%	35%	51%
Salmon	37%	28%	50%	27%	49%	30%
	49% ▲	50% ▲	59% ▲	39% ▲	52%	41%
Muskellunge	10%	15%	10%	7%	17%	6%
	12%	14%	12%	7%	18%	10%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,061; past visitors n=540). 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.

PAST VISITORS: GETTING TO DESTINATIONS – MARKET

All anglers

Past visitors are more likely than anglers overall to fly to a regional hub and then drive (28% vs. 21%) or to use a float plane or charter flight (15% vs. 9%).

U.S. Drive visitors are more likely than their market overall to fly to a regional hub (33% vs. 23%) or use a float plane or charter (17% vs. 10%).

Mode of travel	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Personal vehicle (car, truck, SUV)	83%	78%	82%	83%	89%
	81%	76%	76%	82%	90%
Personal vehicle with trailer (e.g., boat, camper, ATV)	45%	42%	36%	46%	49%
	50% ▲	46%	34%	53% ▲	57%
Fly to a regional hub, then drive	21%	11%	12%	23%	23%
	28% ▲	13%	19%	33% ▲	33%
RV / motorhome	12%	9%	15%	12%	15%
	16% ▲	9%	18%	17% ▲	16%
Float plane or charter flight to a remote destination	9%	7%	6%	10%	9%
	15% ▲	8%	10%	17% ▲	17% ▲

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). T3 How do you typically get to your fishing destinations? Please select all that apply.
"Not sure" (0%) not shown.

PAST VISITORS: GETTING TO DESTINATIONS – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Past visitors are more likely than anglers overall to fly to a regional hub and then drive (28% vs. 21%) or to use a float plane or charter flight (15% vs. 9%).

Younger family visitors are more likely than their group overall to fly to a regional hub (40% vs. 30%) or travel with a trailer (58% vs. 50%).

Mode of travel	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Personal vehicle (car, truck, SUV)	83%	73%	86%	81%	85%	85%
	81%	72%	86%	76%	86%	82%
Personal vehicle with trailer (e.g., boat, camper, ATV)	45%	44%	50%	44%	44%	42%
	50% ▲	45%	58% ▲	51%	50%	40%
Fly to a regional hub, then drive	21%	18%	30%	16%	23%	15%
	28% ▲	31% ▲	40% ▲	23%	25%	20%
RV / motorhome	12%	6%	16%	14%	10%	11%
	16% ▲	5%	22% ▲	18%	13%	13%
Float plane or charter flight to a remote destination	9%	7%	13%	7%	10%	8%
	15% ▲	13%	18% ▲	13% ▲	15%	14% ▲

All anglers (overall) | Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). T3 How do you typically get to your fishing destinations? Please select all that apply.
"Not sure" (0%) not shown.

PAST VISITORS: ROLE IN A FUTURE TRIP – MARKET

All anglers

Past visitors are more likely than anglers overall to say Northern Ontario would be the only destination of a fishing trip (36% vs. 29%).

Rest of Canada (47% vs. 31%) and U.S. Drive visitors (35% vs. 28%) are more likely than their market overall to make it the only destination.

Role of Northern Ontario	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
It would be the only destination of the trip	29%	33%	31%	28%	24%
	36% ▲	37%	47% ▲	35% ▲	27%
It would be the primary destination, with brief stops elsewhere	48%	43%	37%	50%	57%
	46%	45%	38%	47%	53%
It would be one of several equal destinations	20%	21%	22%	19%	17%
	16%	16%	14%	17%	18%
It would be a secondary stop on a trip focused elsewhere	2%	1%	7%	1%	1%
	1%	0%	1%	1%	0%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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.

PAST VISITORS: ROLE IN A FUTURE TRIP – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Past visitors are more likely than anglers overall to say Northern Ontario would be the only destination of a fishing trip (36% vs. 29%).

Younger family visitors are more likely than their group overall to say so (35% vs. 29%).

Role of Northern Ontario	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
It would be the only destination of the trip	29%	24%	29%	31%	31%	25%
	36% ▲	38%	35% ▲	41%	34%	32%
It would be the primary destination, with brief stops elsewhere	48%	44%	50%	46%	49%	51%
	46%	44%	47%	44%	47%	50%
It would be one of several equal destinations	20%	26%	18%	18%	18%	21%
	16%	16%	17%	13%	17%	18%
It would be a secondary stop on a trip focused elsewhere	2%	3%	2%	3%	1%	1%
	1%	2%	1%	1%	1%	0%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). 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.

PAST VISITORS: PREFERRED LODGING – MARKET (1 OF 2)

All anglers

Past visitors are less likely than anglers overall to prefer drive-in lodges or resorts (36% vs. 44%) and commercial cottages or cabin rentals (37% vs. 44%).

U.S. Drive visitors are less likely than their market overall to prefer drive-in lodges (36% vs. 47%).

Lodging option	Overall (n=1,055 / 536)	Ontario (n=85 / 71)	Rest of Canada (n=160 / 74)	U.S. Drive (n=691 / 338)	U.S. Fly (n=119 / 54)
Drive-in lodge or resort	44%	46%	32%	47%	42%
	36% ▼	43%	28%	36% ▼	36%
Commercial cottage or cabin rental	44%	42%	45%	43%	48%
	37% ▼	40%	40%	35% ▼	45%
Hotel or motel	42%	43%	25%	45%	50%
	39%	39%	26%	40%	52%
Private cottage (owned or borrowed)	42%	53%	43%	41%	38%
	38%	49%	44%	34% ▼	34%
Designated campground (private or provincial park)	40%	39%	39%	39%	46%
	37%	40%	39%	34%	44%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,055; past visitors n=536). 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.

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

PAST VISITORS: PREFERRED LODGING – MARKET (2 OF 2)

All anglers

Past visitors' preferences for the lodging options on this slide are similar to those of anglers overall.

U.S. Drive visitors are more likely than their market overall to prefer fly-in or remote outpost camps (20% vs. 14%) and less likely to prefer AirBnB (33% vs. 40%).

Lodging option	Overall (n=1,055 / 536)	Ontario (n=85 / 71)	Rest of Canada (n=160 / 74)	U.S. Drive (n=691 / 338)	U.S. Fly (n=119 / 54)
AirBnB	39%	48%	28%	40%	44%
	35%	47%	28%	33% ▼	42%
Backcountry or wilderness camping	35%	30%	31%	35%	45%
	33%	34%	29%	33%	36%
Home of friends or relatives (unpaid)	17%	24%	25%	14%	19%
	20%	20%	31%	16%	28%
Fly-in or remote outpost camp	14%	8%	16%	14%	19%
	17%	10%	14%	20% ▲	17%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,055; past visitors n=536). 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.

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

PAST VISITORS: PREFERRED LODGING – TRAVELLER TYPE (1 OF 2)

All anglers | Traveller types are defined on slide 10

Past visitors are less likely than anglers overall to prefer drive-in lodges or resorts (36% vs. 44%) and commercial cottages or cabin rentals (37% vs. 44%).

Older family (26% vs. 37%) and younger friend group visitors (32% vs. 43%) are less likely than their group overall to prefer drive-in lodges.

Lodging option	Overall (n=1,055 / 536)	Partners (n=100 / 50)	Younger Families (n=272 / 163)	Older Families (n=270 / 125)	Younger Friends (n=149 / 77)	Older Friends (n=220 / 104)
Drive-in lodge or resort	44%	46%	47%	37%	43%	48%
	36% ▼	37%	43%	26% ▼	32% ▼	38%
Commercial cottage or cabin rental	44%	43%	45%	41%	42%	49%
	37% ▼	35%	40%	34%	33%	42%
Hotel or motel	42%	34%	49%	44%	40%	34%
	39%	46%	49%	38%	39%	21% ▼
Private cottage (owned or borrowed)	42%	41%	45%	40%	39%	45%
	38%	35%	41%	40%	34%	35%
Designated campground (private or provincial park)	40%	34%	45%	37%	36%	48%
	37%	34%	40%	30%	33%	45%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,055; past visitors n=536). 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.

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

PAST VISITORS: PREFERRED LODGING – TRAVELLER TYPE (2 OF 2)

All anglers | Traveller types are defined on slide 10

Past visitors' preferences for the lodging options on this slide are similar to those of anglers overall.

Younger family visitors are less likely than their group overall to prefer backcountry camping (33% vs. 39%).

Lodging option	Overall (n=1,055 / 536)	Partners (n=100 / 50)	Younger Families (n=272 / 163)	Older Families (n=270 / 125)	Younger Friends (n=149 / 77)	Older Friends (n=220 / 104)
AirBnB	39%	37%	47%	37%	47%	31%
	35%	33%	45%	28%	40%	29%
Backcountry or wilderness camping	35%	23%	39%	31%	37%	41%
	33%	21%	33% ▼	34%	31%	41%
Home of friends or relatives (unpaid)	17%	12%	22%	13%	20%	18%
	20%	13%	25%	19%	23%	16%
Fly-in or remote outpost camp	14%	15%	17%	12%	17%	13%
	17%	14%	19%	14%	18%	19%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,055; past visitors n=536). 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.

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

PAST VISITORS: PREFERRED ACCESS – MARKET

All anglers

Past visitors are more open than anglers overall to fly-in or float plane access (32% vs. 27%) and remote boat-in access (50% vs. 46%).

U.S. Drive visitors are more open than their market overall to fly-in (35% vs. 28%) and boat-in access (54% vs. 49%), and slightly less likely to prefer road-accessible areas (82% vs. 86%).

Access type	Overall (n=1,023 / 530)	Ontario (n=83 / 70)	Rest of Canada (n=154 / 72)	U.S. Drive (n=668 / 333)	U.S. Fly (n=118 / 55)
Road-accessible areas	86%	89%	86%	86%	88%
	84%	87%	84%	82% ▼	91%
Remote boat-in access	46%	37%	30%	49%	56%
	50% ▲	40%	34%	54% ▲	61%
Fly-in or float plane access	27%	12%	21%	28%	41%
	32% ▲	15%	23%	35% ▲	46%
Train-in access	16%	8%	12%	18%	18%
	18%	10%	10%	20%	26%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,023; past visitors n=530). 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.

PAST VISITORS: PREFERRED ACCESS – TRAVELLER TYPE

All anglers | Traveller types are defined on slide 10

Past visitors are more open than anglers overall to fly-in or float plane access (32% vs. 27%) and remote boat-in access (50% vs. 46%).

Within each traveller type, differences between visitors and the group overall are not significant on these items.

Access type	Overall (n=1,023 / 530)	Partners (n=97 / 49)	Younger Families (n=265 / 160)	Older Families (n=261 / 124)	Younger Friends (n=146 / 77)	Older Friends (n=212 / 103)
Road-accessible areas	86%	80%	88%	86%	88%	86%
	84%	80%	88%	80%	84%	83%
Remote boat-in access	46%	34%	56%	37%	60%	43%
	50% ▲	46%	60%	43%	62%	44%
Fly-in or float plane access	27%	23%	32%	22%	31%	23%
	32% ▲	28%	37%	28%	31%	30%
Train-in access	16%	20%	23%	12%	14%	14%
	18%	20%	26%	14%	15%	11%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,023; past visitors n=530). 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.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (1 OF 4)

All anglers

Past visitors are less likely than anglers overall to say scenic driving (40% vs. 47%) and Northern Lights viewing (43% vs. 50%) would enhance their trip.

U.S. Drive visitors are less likely than their market overall to choose scenic driving (39% vs. 49%).

Experience	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Northern Lights or dark sky viewing experiences	50%	35%	49%	51%	55%
	43% ▼	36%	40%	43% ▼	49%
Scenic driving or road trip components	47%	48%	42%	49%	47%
	40% ▼	43%	40%	39% ▼	35%
Wildlife viewing separate from hunting or fishing	47%	51%	43%	48%	42%
	45%	52%	43%	44%	45%
Visting local markets, retail and artisans	46%	50%	45%	46%	42%
	41%	51%	46%	37% ▼	46%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (2 OF 4)

All anglers

Past visitors' interest in the experiences on this slide is similar to that of anglers overall.

Within each market, differences between visitors and the market overall are not significant on these experiences.

Experience	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Culinary experiences featuring locally sourced or freshly caught / harvested food	39%	35%	36%	41%	37%
	35%	36%	34%	37%	29%
Visiting local breweries or distilleries	35%	37%	28%	38%	31%
	33%	38%	25%	35%	26%
All-inclusive lodge packages with guided fishing	30%	23%	27%	31%	37%
	30%	24%	19%	32%	45%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	27%	21%	22%	28%	29%
	27%	22%	16%	28%	38%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (3 OF 4)

All anglers

Past visitors' interest in the experiences on this slide is similar to that of anglers overall.

Within each market, differences between visitors and the market overall are not significant on these experiences.

Experience	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Photography or nature interpretation guided experiences	26%	24%	21%	27%	28%
	27%	28%	19%	27%	32%
Indigenous-led cultural or land-based experiences	22%	16%	16%	24%	25%
	23%	17%	16%	24%	31%
Multi-stop regional itineraries combining several Northern Ontario areas	19%	16%	14%	20%	25%
	21%	18%	17%	21%	24%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	19%	14%	18%	20%	18%
	18%	13%	10%	21%	18%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (4 OF 4)

All anglers

Past visitors are more likely than anglers overall to be interested in fishing derbies or tournaments (18% vs. 13%) and learning and interpretation opportunities (21% vs. 17%).

U.S. Drive visitors are more likely than their market overall to choose learning opportunities (24% vs. 19%) and fishing derbies (17% vs. 12%).

Experience	Overall (n=1,067 / 540)	Ontario (n=85 / 71)	Rest of Canada (n=162 / 74)	U.S. Drive (n=700 / 339)	U.S. Fly (n=120 / 55)
Learning and interpretation opportunities	17%	7%	13%	19%	17%
	21% ▲	7%	16%	24% ▲	23%
Youth or family-oriented introduction-to-fishing programs	14%	11%	9%	15%	14%
	16%	10%	10%	19%	18%
Fishing derbies or tournaments	13%	18%	11%	12%	19%
	18% ▲	17%	17%	17% ▲	28%
None – I prefer to focus entirely on the activity	3%	6%	4%	2%	3%
	3%	3%	5%	2%	0%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (1 OF 4)

All anglers | Traveller types are defined on slide 10

Past visitors are less likely than anglers overall to say scenic driving (40% vs. 47%) and Northern Lights viewing (43% vs. 50%) would enhance their trip.

Younger family visitors are less likely than their group overall to choose scenic driving (39% vs. 48%).

Experience	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Northern Lights or dark sky viewing experiences	50%	52%	47%	48%	49%	58%
	43% ▼	42%	38% ▼	39%	39%	57%
Scenic driving or road trip components	47%	52%	48%	46%	38%	54%
	40% ▼	48%	39% ▼	39%	30%	45%
Wildlife viewing separate from hunting or fishing	47%	50%	48%	45%	46%	49%
	45%	44%	45%	40%	44%	52%
Visting local markets, retail and artisans	46%	50%	41%	47%	41%	55%
	41%	50%	35%	41%	39%	51%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (2 OF 4)

All anglers | Traveller types are defined on slide 10

Past visitors' interest in the experiences on this slide is similar to that of anglers overall.

Within each traveller type, differences between visitors and the group overall are not significant on these experiences.

Experience	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Culinary experiences featuring locally sourced or freshly caught / harvested food	39%	31%	41%	37%	37%	47%
	35%	30%	36%	30%	31%	44%
Visiting local breweries or distilleries	35%	27%	34%	34%	37%	44%
	33%	31%	28%	29%	38%	46%
All-inclusive lodge packages with guided fishing	30%	26%	36%	30%	24%	31%
	30%	25%	38%	26%	32%	27%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	27%	21%	37%	25%	26%	23%
	27%	26%	37%	23%	28%	20%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (3 OF 4)

All anglers | Traveller types are defined on slide 10

Past visitors' interest in the experiences on this slide is similar to that of anglers overall.

Within each traveller type, differences between visitors and the group overall are not significant on these experiences.

Experience	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Photography or nature interpretation guided experiences	26%	26%	30%	22%	32%	22%
	27%	28%	29%	24%	37%	18%
Indigenous-led cultural or land-based experiences	22%	16%	25%	22%	21%	19%
	23%	23%	25%	22%	17%	20%
Multi-stop regional itineraries combining several Northern Ontario areas	19%	19%	21%	17%	20%	21%
	21%	23%	20%	21%	22%	19%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	19%	15%	30%	18%	19%	11%
	18%	16%	30%	12%	20%	9%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (4 OF 4)

All anglers | Traveller types are defined on slide 10

Past visitors are more likely than anglers overall to be interested in fishing derbies or tournaments (18% vs. 13%) and learning and interpretation opportunities (21% vs. 17%).

Younger family visitors are more likely than their group overall to choose fishing derbies (24% vs. 19%).

Experience	Overall (n=1,067 / 540)	Partners (n=101 / 50)	Younger Families (n=275 / 165)	Older Families (n=272 / 126)	Younger Friends (n=150 / 77)	Older Friends (n=224 / 104)
Learning and interpretation opportunities	17%	12%	22%	14%	17%	15%
	21% ▲	20%	22%	20%	22%	19%
Youth or family-oriented introduction-to-fishing programs	14%	4%	29%	13%	10%	4%
	16%	7%	31%	14%	16%	3%
Fishing derbies or tournaments	13%	7%	19%	11%	19%	9%
	18% ▲	10%	24% ▲	18%	22%	12%
None – I prefer to focus entirely on the activity	3%	1%	4%	2%	5%	2%
	3%	0%	5%	0%	5%	2%

All anglers (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: all anglers (n=1,067; past visitors n=540). M2 Beyond fishing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (1 OF 4)

Anglers who provided a response

Past visitors describe Northern Ontario's greatest advantage much as anglers overall do, led by its vast, untouched wilderness.

Within each market, differences between visitors and the market overall are not significant on these themes.

Advantage	Overall (n=892 / 456)	Ontario (n=75 / 63)	Rest of Canada (n=127 / 56)	U.S. Drive (n=589 / 291)	U.S. Fly (n=100 / 45)
Vast, Untouched Wilderness & Nature	43%	45%	49%	41%	47%
	44%	45%	43%	44%	44%
Beautiful Scenery & Landscapes	25%	29%	21%	24%	29%
	25%	29%	35%	22%	25%
Abundance of Lakes, Rivers & Water Access	24%	34%	29%	22%	21%
	25%	35%	27%	23%	23%
Less Crowded / Solitude	23%	25%	20%	24%	22%
	23%	25%	17%	24%	24%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who provided a response (n=892; past visitors n=456). 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.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (2 OF 4)

Anglers who provided a response

Past visitors mention each advantage on this slide at a similar rate to anglers overall.

Within each market, differences between visitors and the market overall are not significant on these themes.

Advantage	Overall (n=892 / 456)	Ontario (n=75 / 63)	Rest of Canada (n=127 / 56)	U.S. Drive (n=589 / 291)	U.S. Fly (n=100 / 45)
Great Fishing Opportunities	16%	18%	15%	16%	12%
	15%	18%	6%	15%	20%
Authenticity & Unique Experience	13%	7%	14%	13%	15%
	14%	7%	13%	16%	18%
Wide Range of Outdoor Activities	8%	11%	8%	7%	11%
	8%	13%	3%	7%	10%
Proximity / Accessibility from Home	7%	16%	7%	6%	6%
	8%	17%	9%	5%	13%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who provided a response (n=892; past visitors n=456). 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.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (3 OF 4)

Anglers who provided a response

Past visitors mention each advantage on this slide at a similar rate to anglers overall.

Within each market, differences between visitors and the market overall are not significant on these themes.

Advantage	Overall (n=892 / 456)	Ontario (n=75 / 63)	Rest of Canada (n=127 / 56)	U.S. Drive (n=589 / 291)	U.S. Fly (n=100 / 45)
Unfamiliar / Open to Discovering	7%	6%	5%	7%	9%
	7%	7%	9%	7%	7%
Great Hunting Opportunities	6%	1%	4%	7%	9%
	6%	1%	8%	8%	3%
Northern Lights	4%	3%	0%	5%	3%
	2%	1%	0%	3%	3%
Friendly Locals & Hospitality	3%	4%	1%	3%	3%
	3%	4%	1%	3%	4%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who provided a response (n=892; past visitors n=456). 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.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (4 OF 4)

Anglers who provided a response

Past visitors mention each advantage on this slide at a similar rate to anglers overall.

Within each market, differences between visitors and the market overall are not significant on these themes.

Advantage	Overall (n=892 / 456)	Ontario (n=75 / 63)	Rest of Canada (n=127 / 56)	U.S. Drive (n=589 / 291)	U.S. Fly (n=100 / 45)
Affordable / Good Value	2%	2%	2%	3%	1%
	2%	2%	1%	2%	3%
Cultural & Indigenous Heritage	2%	0%	2%	2%	1%
	2%	0%	3%	2%	3%
Dark Skies & Stargazing	1%	0%	2%	1%	0%
	1%	0%	2%	1%	0%
Wildlife Viewing & Biodiversity	1%	0%	1%	1%	0%
	1%	0%	2%	2%	0%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who provided a response (n=892; past visitors n=456). 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.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (1 OF 4)

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

Past visitors describe Northern Ontario's greatest advantage much as anglers overall do, led by its vast, untouched wilderness.

Within each traveller type, differences between visitors and the group overall are not significant on these themes.

Advantage	Overall (n=892 / 456)	Partners (n=86 / 43)	Younger Families (n=223 / 136)	Older Families (n=235 / 107)	Younger Friends (n=117 / 62)	Older Friends (n=188 / 91)
Vast, Untouched Wilderness & Nature	43%	40%	40%	38%	46%	51%
	44%	49%	42%	38%	47%	47%
Beautiful Scenery & Landscapes	25%	20%	24%	25%	25%	27%
	25%	24%	20%	32%	19%	31%
Abundance of Lakes, Rivers & Water Access	24%	15%	22%	23%	33%	25%
	25%	22%	22%	27%	30%	25%
Less Crowded / Solitude	23%	24%	22%	20%	24%	26%
	23%	21%	21%	21%	27%	25%

Provided a response (overall) | Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who provided a response (n=892; past visitors n=456). 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.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (2 OF 4)

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

Past visitors mention each advantage on this slide at a similar rate to anglers overall.

Within each traveller type, differences between visitors and the group overall are not significant on these themes.

Advantage	Overall (n=892 / 456)	Partners (n=86 / 43)	Younger Families (n=223 / 136)	Older Families (n=235 / 107)	Younger Friends (n=117 / 62)	Older Friends (n=188 / 91)
Great Fishing Opportunities	16%	12%	15%	19%	19%	15%
	15%	11%	13%	19%	23%	10%
Authenticity & Unique Experience	13%	11%	15%	11%	12%	13%
	14%	11%	16%	14%	18%	14%
Wide Range of Outdoor Activities	8%	7%	9%	7%	7%	8%
	8%	11%	7%	5%	9%	7%
Proximity / Accessibility from Home	7%	15%	6%	6%	9%	5%
	8%	20%	7%	6%	8%	6%

Provided a response (overall) | Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who provided a response (n=892; past visitors n=456). 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.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (3 OF 4)

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

Past visitors mention each advantage on this slide at a similar rate to anglers overall.

Within each traveller type, differences between visitors and the group overall are not significant on these themes.

Advantage	Overall (n=892 / 456)	Partners (n=86 / 43)	Younger Families (n=223 / 136)	Older Families (n=235 / 107)	Younger Friends (n=117 / 62)	Older Friends (n=188 / 91)
Unfamiliar / Open to Discovering	7%	9%	7%	7%	2%	10%
	7%	7%	8%	7%	1%	12%
Great Hunting Opportunities	6%	4%	7%	6%	8%	5%
	6%	4%	6%	5%	9%	8%
Northern Lights	4%	5%	3%	3%	6%	4%
	2%	4%	3%	0%	4%	1%
Friendly Locals & Hospitality	3%	2%	4%	5%	3%	1%
	3%	3%	4%	3%	2%	1%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who provided a response (n=892; past visitors n=456). 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.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (4 OF 4)

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

Past visitors mention each advantage on this slide at a similar rate to anglers overall.

Within each traveller type, differences between visitors and the group overall are not significant on these themes.

Advantage	Overall (n=892 / 456)	Partners (n=86 / 43)	Younger Families (n=223 / 136)	Older Families (n=235 / 107)	Younger Friends (n=117 / 62)	Older Friends (n=188 / 91)
Affordable / Good Value	2%	4%	3%	2%	1%	2%
	2%	3%	2%	3%	1%	3%
Cultural & Indigenous Heritage	2%	2%	2%	1%	2%	2%
	2%	4%	2%	0%	1%	3%
Dark Skies & Stargazing	1%	0%	1%	2%	1%	1%
	1%	0%	0%	2%	1%	0%
Wildlife Viewing & Biodiversity	1%	3%	1%	0%	2%	1%
	1%	7%	1%	0%	3%	0%

Provided a response (overall) | Have visited Northern Ontario (past 5 years)

▲ / ▼ Visited Northern Ontario significantly higher / lower than overall

Base: anglers who provided a response (n=892; past visitors n=456). 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.