CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE II
Avid Auto/RV Tourers: All Tourers Report

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

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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 five priority traveller segments to Northern Ontario: Motorcycling, Snowmobiling, ORVing, Auto/RV touring and Boating 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 auto/RV touring 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 Auto/RV Tourer: The respondents who go on auto/RV touring trips, own, lease or have regular access to a car, truck, SUV or RV suitable for road trips, take at least 3 multi-day road trips a year, and have a high household income (CA: $75K+ / US: $50K+)

Total Sample:
- Avid Auto/RV Tourers: n=1,108

Fieldwork Date:
- August 24th – September 20th, 2026

Median Length of Interview:
- 20.7 minutes



REGIONAL SAMPLE SIZE

Regional Sample Size

Total	1,108
Canada	389
Ontario	113
Quebec	86
Manitoba	49
Alberta	74
British Columbia	66

U.S. Drive	583
Illinois	104
Ohio	78
New York	64
Michigan	62
Wisconsin	47
Minnesota	75
Pennsylvania	64
Indiana	41
New Jersey	47

U.S. Fly	136
California	50
Colorado	40
Texas	46



METHODOLOGY

Survey Language:
The survey was administered in English and French

Margin of Error:
Avid Auto/RV Tourers: ± 2.9%

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 auto/RV tourer: Aged 30–64, owns, leases or has regular access to a car, truck, SUV or RV suitable for road trips, takes at least three multi-day road trips a year, and has a household income of $75K+ (Canada) or $50K+ (U.S.). RV ownership is not required.

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 an auto/RV touring trip in the past five years (51% of avid auto/RV tourers, n=563).

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

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 1.37.

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 Tourers report (this report)
All avid auto/RV tourers, n=1,108

Covers who avid auto/RV tourers 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 auto/RV touring segment, including those who have not yet visited Northern Ontario.

Past Visitors report
Avid auto/RV tourers who have visited Northern Ontario for auto/RV touring in the past five years, n=563

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 auto/RV tourers on key measures.

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

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



TRAVELLER TYPE SEGMENTS

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

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

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

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

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

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

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



NORTHERN ONTARIO - REGIONS

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

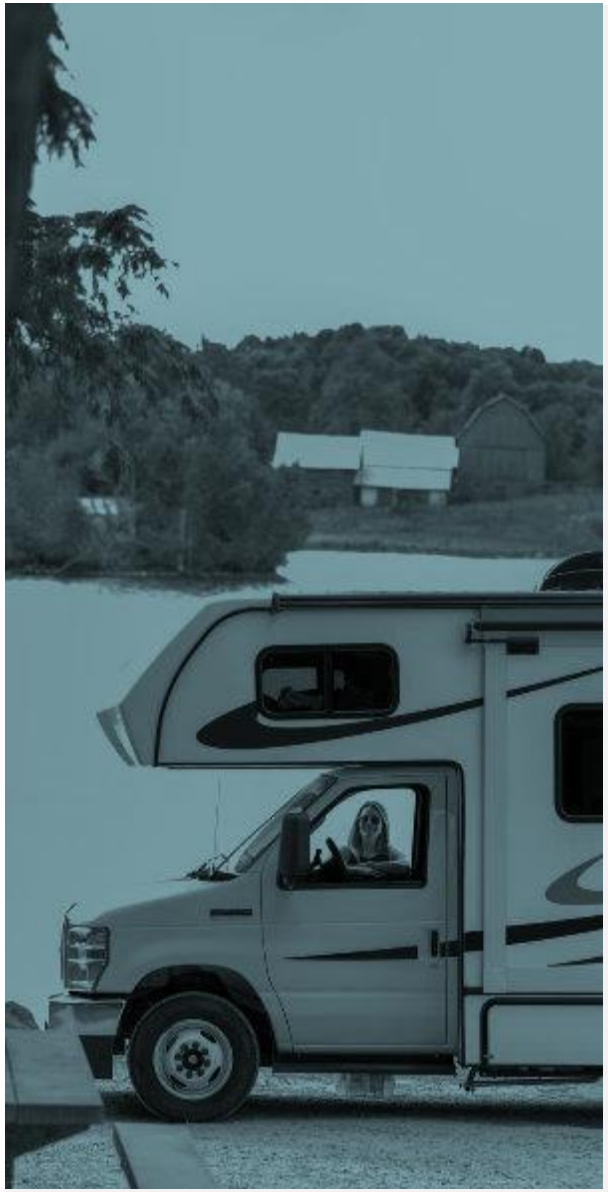
Northwest Ontario - Superior Country
e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area

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

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

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





EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – PROFILE & TRIP BEHAVIOUR

ALL AVID AUTO/RV TOURERS

Auto/RV tourers are highly active travellers. They take 5.2 touring trips a year of 4.6 nights each and are willing to drive 14.1 hours one way. Cars or SUVs (66%) are most common, followed by pickups (28%), motorhomes (26%) and travel trailers (24%); younger families are more likely to tour by pickup (36%) or motorhome (34%), while older friend groups rarely use a motorhome (7%). (See slides 38, 39, 42, 43, 55)

Experience and commitment vary widely by traveller type. Over a third (37%) have been touring for more than 10 years, rising to 60% of older friend groups, 51% of partners and 50% of Rest of Canada tourers. One in ten (10%) are newcomers of less than two years, rising to 18% of Ontario tourers. Most were introduced by family (56%), but younger friend groups more often by friends (46%). Eight in ten (79%) say touring is central to who they are, rising to 88% of younger families, and half of U.S. Fly tourers strongly agree (50%). (See slides 36, 37, 45–47)

Touring is a broad, three-season product. Summer (80%) leads, but fall (64%) and spring (56%) appeal to more than half, and winter to 18%. U.S. Fly tourers are the most open to winter (37%), partners to fall (77%) and U.S. Drive tourers to spring (63%), while Ontario (38%) and Rest of Canada (45%) tourers are less drawn to spring. Most travel by personal vehicle (76%) and a third (33%) by RV or motorhome, rising to 46% of U.S. Fly tourers and 40% of younger families. Two-thirds (66%) tour fully self-guided, rising to 80% of Rest of Canada tourers and 79% of partners, while younger families are more likely to mix guided and self-guided touring (38%). (See slides 51–54, 58, 59)

Planning is digital-first, with distinct habits by group. Internet search (59%) and word of mouth (57%) lead, followed by social media content (45%), booking or review sites (43%) and official tourism websites (42%). Older friend groups rely heavily on word of mouth (86%) and partners on internet search (72%), while younger families use influencers (29%) and specialized apps (22%) more. Booking is direct with accommodation providers (58%) or RV parks and campgrounds (52%), or online (50%), and U.S. Fly tourers (24%) and younger families (23%) are more likely to book through a travel agent. Two-thirds (65%) are likely to use AI to plan, rising to 78% of younger families and falling to 49% of partners. (See slides 65–70, 73, 74, 76)



EXECUTIVE SUMMARY – MOTIVATIONS, VALUES & BARRIERS

ALL AVID AUTO/RV TOURERS

Discovery motivates tourers most. Experiencing new places (73%) is the top motivation, followed by escape (70%) and connection with nature (65%). Partners are the most escape-driven (83%), U.S. Fly tourers are more likely to seek thrill (55%) and camaraderie (31%), and younger friend groups are less motivated by escape (54%) and new places (58%). Northern Lights viewing (62%) and scenic driving (60%) are the strongest add-ons, rising to 80% among older friend groups for Northern Lights and 67% among older families for scenic driving, while younger families are more drawn to youth programs (28%) and touring events (20%). (See slides 80–87)

Personal responsibility for the environment is near-universal. Nine in ten (92%) feel a personal responsibility to protect the places they visit, and supporting local businesses and conservation (86% each) lead destination considerations. Two-thirds (65%) say certification is important, rising to 85% of younger friend groups and 81% of younger families and falling to 47% of older friend groups. Younger families and U.S. Fly tourers are more willing to pay more for a conservation benefit (79% each, against 61% overall), while Rest of Canada tourers place less importance on learning about Indigenous culture (46%) and accessibility (52%). (See slides 77, 106–111)

Tourers face a broad range of barriers. Cost (41%), weather (39%), transportation costs (39%), wildfires (38%), safety (35%) and road access (34%) all rank highly, and 59% say financial pressures have affected their travel plans. Cost rises to 57% among Rest of Canada tourers and 50% among partners, and weather to 57% among Ontario tourers. Older friend groups are the most concerned across the board, including wildfires (65%), poor value (61%), safety (57%) and expensive licensing (50%). (See slides 142–148)

Safety concern is about confidence in the drive. Tourers concerned about safety are far more likely to also cite road access (57% vs. 22%), weather (59% vs. 29%), lack of amenities (48% vs. 17%) and poor connectivity (44% vs. 17%), and they lean toward roofed, road-accessible stays (hotels 56% vs. 43%).



EXECUTIVE SUMMARY – DESTINATION STRENGTH & FUTURE DEMAND

ALL AVID AUTO/RV TOURERS

Northern Ontario's touring product is well regarded, but less so among Rest of Canada tourers and partners. Nine in ten (90%) agree the region has excellent touring routes and scenic byways, and 89% of those who know it rate it 4 or 5 out of 5, rising to 96% of U.S. Fly tourers and falling to 77% of Rest of Canada tourers. Safety (93%), cost (92%) and access to nature (92%) are the leading decision factors. Rest of Canada tourers and partners are the least likely to say Northern Ontario is better than alternatives closer to home (49% and 56%, against 69% overall) or good value for money (63% and 68%, against 82%). (See slides 115, 117–120, 127–132)

Advocacy and intent vary sharply by market. The Net Promoter Score is 26, ranging from -6 among Rest of Canada tourers to 44 among U.S. Fly tourers, and from 1 among partners to 40 among younger families. Two-thirds (68%) are likely to visit in the next two years, rising to 88% of Ontario tourers and 84% of younger families, and falling to 48% of Rest of Canada tourers and 53% of partners. Seven in ten would make Northern Ontario the only (19%) or primary (50%) destination of a trip; younger families are the most likely to make it the only destination (29%), while 17% of Rest of Canada tourers see it as a secondary stop. (See slides 116, 124–126)

Northern Ontario is a destination of choice for U.S. Fly tourers, and of convenience for many others. Six in ten (61%) see Northern Ontario as a destination of choice, rising to 79% of U.S. Fly tourers and 73% of Ontario tourers, while Rest of Canada tourers (56%) and older friend groups (51%) are more likely to see it as a destination of convenience. (See slides 121, 122)

Campgrounds lead lodging preferences, with roofed stays preferred by older travellers. Nine in ten (90%) prefer road-accessible areas, while U.S. Fly tourers are more open to train-in (35%), boat-in (33%) and fly-in access (31%). Designated campgrounds (58%) are the preferred lodging, followed by hotels (48%) and drive-in lodges (45%); older friend groups prefer hotels (67%) and drive-in lodges (63%), and U.S. Fly tourers commercial cottages (53%). (See slides 133–136)



EXECUTIVE SUMMARY – ESTABLISHED AUDIENCES & FUTURE GROWTH

ALL AVID AUTO/RV TOURERS

Auto/RV touring balances a large established base of older families with younger families driving future growth. Older families are the largest part of the market today (35% of the estimated market) and remain central to it, although their trip frequency in Northern Ontario is generally stable or declining. Younger families are a slightly smaller audience today (33%), but show the highest intent and are more likely to be taking more Northern Ontario trips than they were 10 years ago. (See slides 29 and 124, and slide 20 of the Past Visitors report)

Older families are the largest established audience. They take 5.2 touring trips a year, and two-thirds (66%) are likely to visit in the next two years. New places (76%), escape (71%) and bonding (67%) motivate them, and scenic driving (67%) and Northern Lights viewing (62%) would enhance their trips. They prefer campgrounds (59%) and plan through internet search (60%) and word of mouth (56%); cost weighs on them more than on most (47%), making value the key to keeping them engaged. (See slides 42, 68, 82, 83, 86, 87, 124, 136, 145)

Younger families want structured, family-oriented touring. They are the most likely to visit in the next two years (84%), with a Net Promoter Score of 40. New places (66%) and escape (65%) lead their motivations, and youth or family introduction programs (28%) and touring events (20%) appeal more than to tourers overall. They are less concerned about cost (29%), weather (32%) and safety (27%), prefer campgrounds (58%), and plan through influencers (29%), specialized apps (22%) and Instagram (74%), with 78% likely to use AI to plan. (See slides 69, 72, 76, 82, 86, 87, 116, 124, 136, 145)



EXECUTIVE SUMMARY – SPEND, YIELD & ECONOMIC POTENTIAL

ALL AVID AUTO/RV TOURERS

Auto/RV trips to Northern Ontario are high-value. Travel parties spent an average of $3,615 on their most recent trip, about $840 per visitor over 5.5 nights (roughly $150 per visitor per night), and two-thirds (65%) stayed in paid roofed accommodation.

U.S. visitors deliver the highest yield. U.S. Fly visitors spend about $1,090 per visitor and U.S. Drive visitors about $970, against $340 for Ontario visitors, who take shorter trips (4.1 nights). The U.S. markets make up 86% of the potential market but 92% of its potential value. Rest of Canada visitors stay longest (7.7 nights) but spend less per night.

Couples spend the most per person, and families the most per trip. Partners spend about $1,450 per visitor because they travel in smaller parties, while older families spend the most per party ($4,225) but are the least likely to use paid lodging (53%). Friend groups spend the least per party (about $2,400 to $2,500).

Small gains in visitation or length of stay are worth a lot. Every 1,000 additional U.S. Drive tourers would bring about $970,000 in visitor spending and 5,200 visitor nights. Each extra night adds about $150 per visitor, which makes the levers to extend stays (better value, quality paid accommodation and connectivity) economically significant.



SPEND AND LENGTH OF STAY BY MARKET

ALL AVID AUTO/RV TOURERS

U.S. visitors spend the most per visitor and per night; Ontario visitors take the shortest, lowest-spend trips. Rest of Canada visitors stay longest (7.7 nights) but spend less per night than U.S. visitors.

Measure	Overall	Ontario	Rest of Canada	U.S. Drive	U.S. Fly
Average party spend per trip	$3,615	$1,606 ▼	$2,983	$4,169 ▲	$4,986 ▲
Average party size (people)	4.3	4.7	4.1	4.3	4.6
Spend per visitor per trip	$838	$342	$732	$970	$1,094
Average nights	5.5	4.1 ▼	7.7 ▲	5.2	5.1
Spend per visitor per night	$153	$84	$95	$187	$214
Stayed in paid roofed lodging	65%	56%	63%	66%	76%

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



SPEND AND LENGTH OF STAY BY TRAVELLER TYPE

ALL AVID AUTO/RV TOURERS

Older families and younger families spend the most per trip; partners spend the most per person. Friend groups spend less per trip, but older friend groups are the most likely to stay in paid roofed lodging (77%).

Measure	Overall	Partners	Younger families	Older families	Younger friends	Older friends
Average party spend per trip	$3,615	$2,965	$3,963	$4,225	$2,526 ▼	$2,390 ▼
Average party size (people)	4.3	2.0	5.2	5.1	4.3	3.9
Spend per visitor per trip	$838	$1,447	$758	$828	$594	$609
Average nights	5.5	5.8	5.0	6.0	5.4	6.1
Spend per visitor per night	$153	$249	$153	$137	$109	$101
Stayed in paid roofed lodging	65%	65%	70%	53% ▼	67%	77%

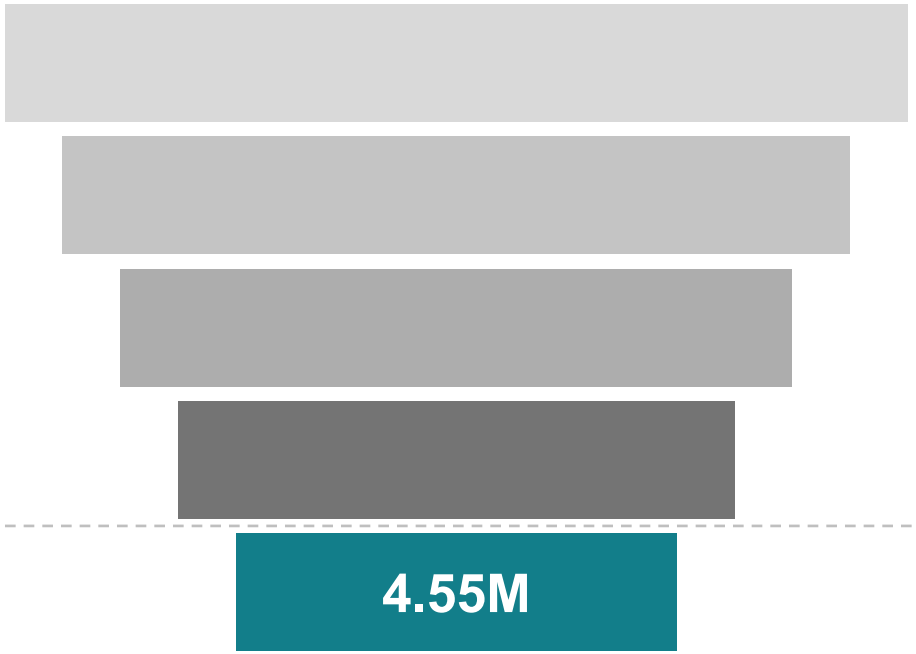
Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than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



MARKET SUMMARY

HOW THE OPPORTUNITY POOL IS BUILT: AVID AUTO/RV TOURERS

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



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

Auto/RV touring participants
Residents who participate in auto/RV touring trips.

Aged 30–64
Auto/RV touring participants within the study's target age range.

Total addressable market
Auto/RV tourers who also meet the study's household income threshold.

Opportunity pool
Auto/RV tourers who intend to visit Northern Ontario for an auto/RV touring trip within the next two years.

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

Bars are not to scale. Population: U.S. Census Bureau and Statistics Canada. Participation and income: published travel research and census data. Intent: Phase 2 survey. Income threshold: $75K+ CAD (Canada), $50K+ USD (U.S.).

ESTIMATED NORTHERN ONTARIO OPPORTUNITY POOL: AVID AUTO/RV TOURERS

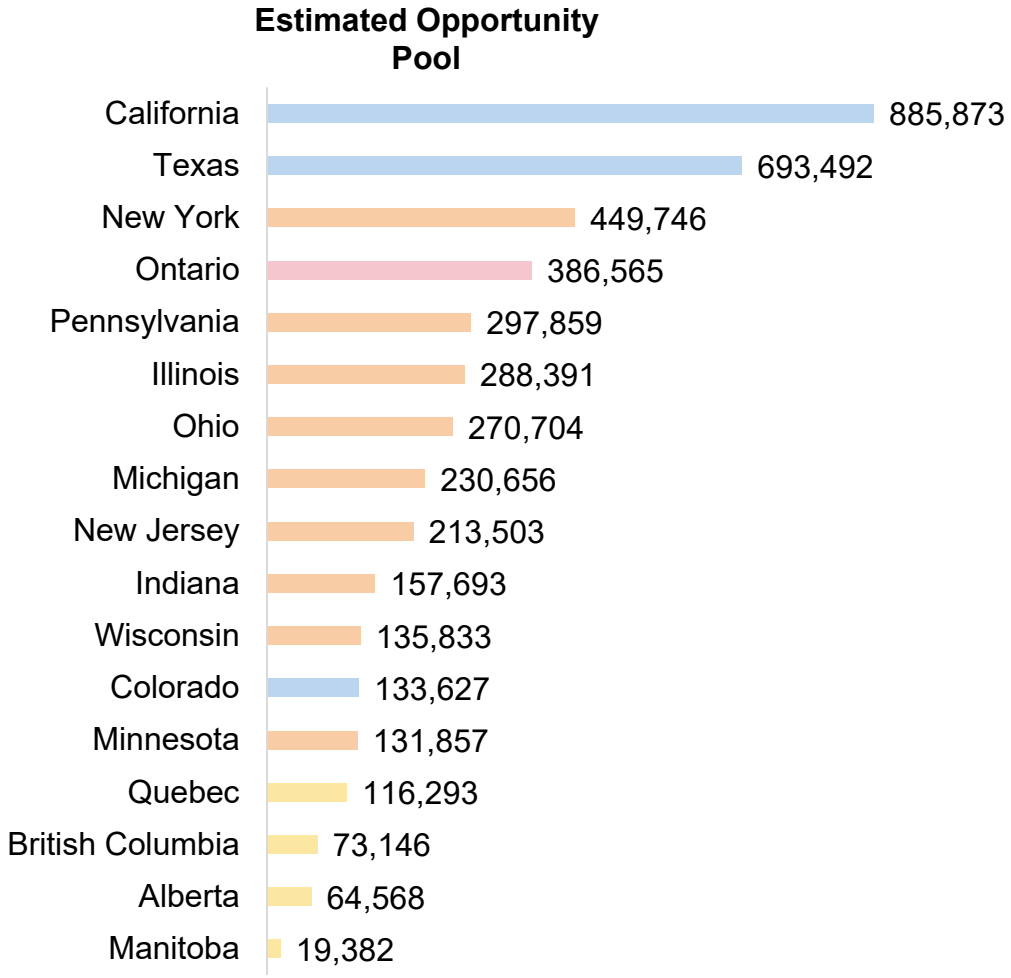
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO
386,565

Rest of Canada
273,389

U.S. Drive
2,176,242

U.S. Fly
1,712,992



Avid auto/RV tourers aged 30–64 in the surveyed markets who told us they intend to take an auto/RV touring trip to Northern Ontario in the next two years. Not a forecast of visitors. All markets: 4,549,188.

INCREMENTAL VISITOR SPEND: AVID AUTO/RV TOURERS

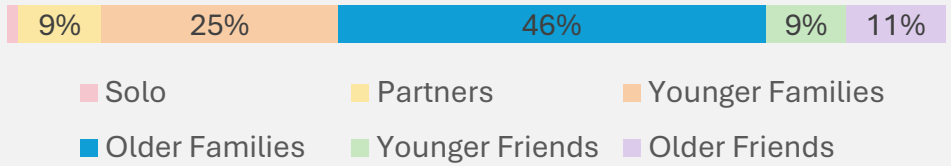
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO	**386,565** Opportunity pool	**1,000** additional visitors	×	**$342** spend per visitor	=	**$342K** incremental visitor spend
Rest of Canada	**273,389** Opportunity pool	**1,000** additional visitors	×	**$732** spend per visitor	=	**$732K** incremental visitor spend
U.S. Drive	**2,176,242** Opportunity pool	**1,000** additional visitors	×	**$970** spend per visitor	=	**$970K** incremental visitor spend
U.S. Fly	**1,712,992** Opportunity pool	**1,000** additional visitors	×	**$1,094** spend per visitor	=	**$1.09M** incremental visitor spend

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

ONTARIO – AUTO/RV TOURING

ESTIMATED OPPORTUNITY POOL: 386,565



HOW THEY TRAVEL

- Ontario tourers are the most frequent and most loyal visitors, on shorter, lower-spend trips.
- 82% have toured in Northern Ontario in the past five years (the highest of any market), averaging 4.3 trips.
- Their most recent trip lasted 4.1 nights at $1,606 per party (the lowest of any market), and 56% stayed in paid roofed lodging.
- Hotels or motels (48%) and drive-in lodges or resorts (47%) are the preferred lodging options.
- The Great Canadian Wilderness (54%) and Northeast Ontario (49%) are the most visited regions, and summer (79%) and fall (62%) the preferred seasons. (See slides 51, 135, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Escape from everyday stress (72%) and experiencing new places (71%) are the leading motivations.
- Bonding with friends or family follows (64%).
- Scenic driving (67%) and Northern Lights viewing (62%) are the strongest add-on experiences. (See slides 80–81, 84)

WHAT THEY VALUE

- Supporting local businesses (83%) and minimal environmental impact (83%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (63%) and paying more for a clear conservation benefit (54%) compare with 69% and 61% for the segment.
- 60% say a recognized certification or designation is important. (See slides 77, 106, 109)

WHAT HOLDS THEM BACK

- Weather or season timing (57%), wildfires and other disruptions (50%) and cost (50%) are the leading barriers.
- Poor connectivity weighs more than for the segment overall (39% vs. 27%).
- 56% say financial pressures have affected their travel plans. (See slides 142–144, 148)

WHAT WOULD GROW THEM

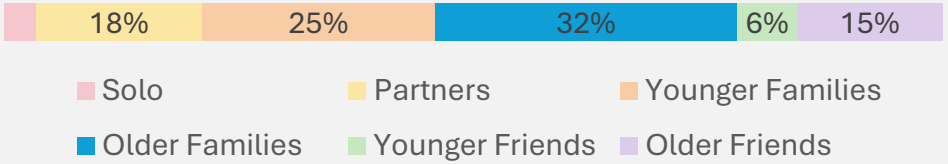
- Better value (49%), better connectivity (36%) and quality paid accommodation (35%) would most encourage longer stays.
- 88% are likely to visit in the next two years (the highest of any market).
- Among those who know the region, Northern Ontario's NPS is 25 (segment 26). (See slides 116, 124, 137)

WHERE TO REACH THEM

- Word of mouth (68%), general search (56%) and social media content (54%) are the leading planning sources.
- Among social media users, YouTube (76%), Facebook (70%) and Instagram (62%) lead.
- 61% are likely to use AI tools to plan their next trip. (See slides 65, 71, 76)

REST OF CANADA – AUTO/RV TOURING

ESTIMATED OPPORTUNITY POOL: 273,389



HOW THEY TRAVEL

- Rest of Canada tourers are the least engaged market, and the only one with a negative NPS.
- 40% have toured in Northern Ontario in the past five years (the lowest of any market), averaging 1.0 trips.
- Their most recent trip lasted 7.7 nights at $2,983 per party, and 63% stayed in paid roofed lodging.
- Designated campgrounds (69%) and hotels or motels (50%) are the preferred lodging options.
- Algoma Country (22%) and Northeast Ontario (20%) are the most visited regions, and summer (85%) and fall (61%) the preferred seasons. (See slides 51, 116, 135, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Experiencing new places (75%) and escape from everyday stress (72%) are the leading motivations.
- Thrill and adventure matters less than in the segment overall (25% vs. 40%).
- Northern Lights viewing (64%) and scenic driving (58%) are the strongest add-on experiences. (See slides 80, 84)

WHAT THEY VALUE

- Conservation (84%) and minimal environmental impact (80%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (46%) and paying more for a clear conservation benefit (46%) are lower than in the segment.
- 50% say a recognized certification or designation is important (the lowest of any market). (See slides 77, 106, 109)

WHAT HOLDS THEM BACK

- Cost (57%), poor value for money (51%) and weather or season timing (47%) are the leading barriers.
- 69% say financial pressures have affected their travel plans. (See slides 142, 148)

WHAT WOULD GROW THEM

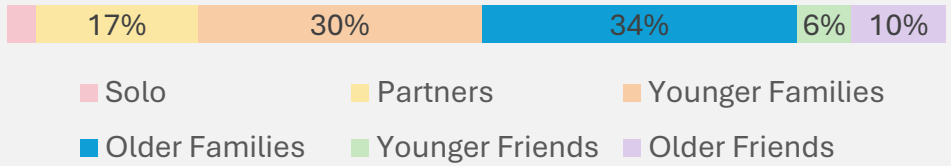
- Better value (38%), improved access infrastructure (26%) and quality paid accommodation (24%) would most encourage longer stays.
- 48% are likely to visit in the next two years (the lowest of any market).
- Among those who know the region, Northern Ontario's NPS is -6, below the segment (26). (See slides 116, 124, 137)

WHERE TO REACH THEM

- Word of mouth (63%), general search (62%) and official tourism websites (44%) are the leading planning sources.
- Among social media users, Facebook (81%), YouTube (68%) and Instagram (65%) lead.
- 56% are likely to use AI tools to plan their next trip (the lowest of any market). (See slides 65, 71, 76)

U.S. DRIVE – AUTO/RV TOURING

ESTIMATED OPPORTUNITY POOL: 2,176,242



HOW THEY TRAVEL

- U.S. Drive tourers are the largest market and hold the largest pool of convertible non-visitors.
- 50% have toured in Northern Ontario in the past five years, averaging 1.4 trips.
- Their most recent trip lasted 5.2 nights at $4,169 per party (above the segment's $3,615), and 66% stayed in paid roofed lodging.
- Designated campgrounds (57%) and drive-in lodges or resorts (48%) are the preferred lodging options.
- Superior Country (22%) and Algoma Country (21%) are the most visited regions, and summer (79%) and fall (65%) the preferred seasons. (See slides 51, 135, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Experiencing new places (72%) and escape from everyday stress (70%) are the leading motivations.
- Connection with nature follows (67%).
- Northern Lights viewing (62%) and scenic driving (61%) are the strongest add-on experiences. (See slides 80–81, 84)

WHAT THEY VALUE

- Supporting local businesses (90%) and conservation (86%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (79%) and paying more for a clear conservation benefit (65%) are higher than in the segment.
- 71% say a recognized certification or designation is important (above the segment's 65%). (See slides 77, 106, 109)

WHAT HOLDS THEM BACK

- Transportation costs (36%), cost (35%) and weather or season timing (34%) are the leading barriers.
- Poor value for money is less of a concern (27% vs. 33%).
- 57% say financial pressures have affected their travel plans. (See slides 142, 148)

WHAT WOULD GROW THEM

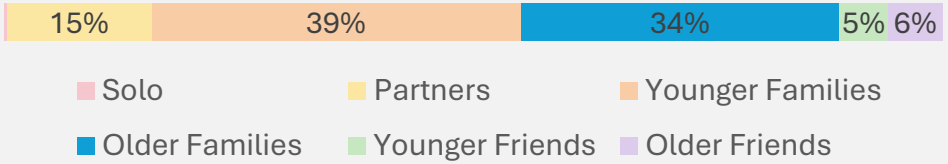
- Better value (37%), quality paid accommodation (32%) and more for travel companions to do (29%) would most encourage longer stays.
- 73% are likely to visit in the next two years (above the segment's 68%).
- Among those who know the region, Northern Ontario's NPS is 35, above the segment (26). (See slides 116, 124, 137)

WHERE TO REACH THEM

- General search (59%), word of mouth (54%) and social media content (45%) are the leading planning sources.
- Among social media users, Facebook (80%), YouTube (77%) and Instagram (55%) lead.
- 67% are likely to use AI tools to plan their next trip. (See slides 65, 71, 76)

U.S. FLY – AUTO/RV TOURING

ESTIMATED OPPORTUNITY POOL: 1,712,992



HOW THEY TRAVEL

- U.S. Fly tourers rate Northern Ontario most highly and spend the most per trip.
- 51% have toured in Northern Ontario in the past five years, averaging 1.6 trips.
- Their most recent trip lasted 5.1 nights at $4,986 per party (the highest of any market), and 76% stayed in paid roofed lodging.
- Commercial cottages or cabins (53%) and hotels or motels (51%) are the preferred lodging options, and fly-in outpost camps are more popular than in the segment (17% vs. 9%).
- Sunset Country (27%) and Algoma Country (25%) are the most visited regions, and summer (70%) and fall (64%) the preferred seasons. (See slides 51, 135, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Experiencing new places (75%) and connection with nature (67%) are the leading motivations.
- Thrill and adventure matters more than in the segment overall (55% vs. 40%).
- Northern Lights viewing (59%) and scenic driving (55%) are the strongest add-on experiences. (See slides 80, 84)

WHAT THEY VALUE

- Conservation (93%) and minimal environmental impact (90%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (79%) and paying more for a clear conservation benefit (79%) are higher than in the segment.
- 77% say a recognized certification or designation is important (the highest of any market). (See slides 77, 106, 109)

WHAT HOLDS THEM BACK

- Transportation costs (35%), complicated licensing or permits (33%) and safety concerns (32%) are the leading barriers.
- Cost is less of a concern (28% vs. 41%).
- 50% say financial pressures have affected their travel plans. (See slides 142, 148)

WHAT WOULD GROW THEM

- More for travel companions to do (44%), better value (43%) and quality paid accommodation (42%) would most encourage longer stays.
- 72% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 44, above the segment (26). (See slides 116, 124, 137)

WHERE TO REACH THEM

- General search (56%), word of mouth (46%) and booking or review sites (45%) are the leading planning sources.
- Among social media users, YouTube (82%), Facebook (80%) and Instagram (75%) lead.
- 74% are likely to use AI tools to plan their next trip (the highest of any market). (See slides 65, 71, 76)



TRAVELLER TYPE SUMMARY

ESTIMATED OPPORTUNITY POOL BY TRAVELLER TYPE: AVID AUTO/RV TOURERS

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

SOLO
84,861

YOUNGER FAMILIES
1,497,035

YOUNGER FRIENDS
265,645

PARTNERS
723,370

OLDER FAMILIES
1,576,818

OLDER FRIENDS
401,460

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

PARTNERS – AUTO/RV TOURING

ESTIMATED OPPORTUNITY POOL: 723,370

WHO THEY ARE
- Partners are long-time tourers and the most escape-driven, but also the most concerned about cost and road access.
- 10% have children under 18 at home, and the largest age group is 55 to 64 (62%).
- 51% have been auto/RV touring for more than 10 years (above the segment's 37%), and 75% say it is central to who they are. (See slides 37, 47)

HOW THEY TRAVEL
- 41% have toured in Northern Ontario in the past five years, averaging 1.2 trips.
- Their most recent trip lasted 5.8 nights at $2,965 per party, and 65% stayed in paid roofed lodging.
- Designated campgrounds (55%) and hotels or motels (52%) are the preferred lodging options.
- Algoma Country (23%) and Sunset Country (17%) are the most visited regions, and fall (77%) and summer (74%) the preferred seasons. (See slides 52, 136, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Escape from everyday stress (83%) and experiencing new places (80%) are the leading motivations.
- Bonding with friends or family matters less than in the segment overall (47% vs. 60%).
- Scenic driving (66%) and Northern Lights viewing (64%) are the strongest add-on experiences. (See slides 82, 86)

WHAT THEY VALUE
- Supporting local businesses (82%) and minimal environmental impact (81%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (62%) and paying more for a clear conservation benefit (47%) are lower than in the segment.
- 55% say a recognized certification or designation is important (below the segment's 65%). (See slides 77, 107, 111)

WHAT HOLDS THEM BACK
- Cost (50%), transportation costs (46%) and poor road, trail or water access (45%) are the leading barriers.
- 49% say financial pressures have affected their travel plans. (See slides 145, 148)

WHAT WOULD GROW THEM
- Quality paid accommodation (33%), better connectivity (31%) and better value (31%) would most encourage longer stays.
- 53% are likely to visit in the next two years (the lowest of any traveller type).
- Among those who know the region, Northern Ontario's NPS is 1, below the segment (26). (See slides 116, 124, 139)

WHERE TO REACH THEM
- General search (72%), word of mouth (55%) and official tourism websites (50%) are the leading planning sources.
- Among social media users, Facebook (82%), YouTube (73%) and Instagram (43%) lead.
- 49% are likely to use AI tools to plan their next trip (the lowest of any traveller type). (See slides 68, 72, 76)

YOUNGER FAMILIES – AUTO/RV TOURING

ESTIMATED OPPORTUNITY POOL: 1,497,035

WHO THEY ARE
- Younger families are the growth audience: they take the most trips and are the most likely to visit in the next two years.
- 94% have children under 18 at home, and the largest age group is 35 to 44 (74%).
- 21% have been auto/RV touring for more than 10 years (the lowest of any traveller type), and 88% say it is central to who they are (the highest of any traveller type). (See slides 37, 47, 124)

HOW THEY TRAVEL
- 69% have toured in Northern Ontario in the past five years (the highest of any traveller type), averaging 2.7 trips.
- Their most recent trip lasted 5.0 nights at $3,963 per party, and 70% stayed in paid roofed lodging.
- Designated campgrounds (58%) and hotels or motels (43%) are the preferred lodging options, and backcountry camping are more popular than in the segment (38% vs. 30%).
- Northeast Ontario (36%) and Algoma Country (34%) are the most visited regions, and summer (82%) and fall (60%) the preferred seasons. (See slides 52, 136, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Experiencing new places (66%) and escape from everyday stress (65%) are the leading motivations.
- Connection with nature follows (64%).
- Northern Lights viewing (56%) and scenic driving (48%) are the strongest add-on experiences. (See slides 82–83, 86)

WHAT THEY VALUE
- Supporting local businesses (92%) and conservation (91%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (78%) and paying more for a clear conservation benefit (79%) are higher than in the segment.
- 81% say a recognized certification or designation is important (above the segment's 65%). (See slides 77, 107, 111)

WHAT HOLDS THEM BACK
- Wildfires and other disruptions (33%), weather or season timing (32%) and transportation costs (32%) are the leading barriers.
- Cost is less of a concern (29% vs. 41%).
- 60% say financial pressures have affected their travel plans. (See slides 145, 147–148)

WHAT WOULD GROW THEM
- Better value (42%), improved access infrastructure (37%) and quality paid accommodation (33%) would most encourage longer stays.
- 84% are likely to visit in the next two years (the highest of any traveller type).
- Among those who know the region, Northern Ontario's NPS is 40, above the segment (26). (See slides 116, 124, 139)

WHERE TO REACH THEM
- Word of mouth (50%), general search (49%) and social media content (46%) are the leading planning sources.
- Influencers play a bigger role than for the segment (29% vs. 21%).
- Among social media users, Facebook (79%), YouTube (78%) and Instagram (74%) lead.
- 78% are likely to use AI tools to plan their next trip (the highest of any traveller type). (See slides 68–70, 72, 76)

OLDER FAMILIES – AUTO/RV TOURING

ESTIMATED OPPORTUNITY POOL: 1,576,818

WHO THEY ARE
- Older families are the largest traveller type, and cost weighs on them more than on most.
- 68% have children under 18 at home, and the largest age group is 45 to 54 (67%).
- 43% have been auto/RV touring for more than 10 years, and 74% say it is central to who they are. (See slides 37, 47)

HOW THEY TRAVEL
- 43% have toured in Northern Ontario in the past five years (below the segment's 51%), averaging 1.1 trips.
- Their most recent trip lasted 6.0 nights at $4,225 per party, and 53% stayed in paid roofed lodging.
- Designated campgrounds (59%) and short-term rentals (44%) are the preferred lodging options.
- Northeast Ontario (19%) and The Great Canadian Wilderness (19%) are the most visited regions, and summer (80%) and fall (62%) the preferred seasons. (See slides 52, 136, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Experiencing new places (76%) and escape from everyday stress (71%) are the leading motivations.
- Bonding with friends or family follows (67%).
- Scenic driving (67%) and Northern Lights viewing (62%) are the strongest add-on experiences. (See slides 82–83, 86)

WHAT THEY VALUE
- Conservation (86%) and supporting local businesses (84%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (64%) and paying more for a clear conservation benefit (55%) compare with 69% and 61% for the segment.
- 59% say a recognized certification or designation is important (below the segment's 65%). (See slides 77, 107, 111)

WHAT HOLDS THEM BACK
- Cost (47%), transportation costs (41%) and weather or season timing (39%) are the leading barriers.
- 59% say financial pressures have affected their travel plans. (See slides 145, 148)

WHAT WOULD GROW THEM
- Better value (38%), more for travel companions to do (32%) and quality paid accommodation (27%) would most encourage longer stays.
- 66% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 30 (segment 26). (See slides 116, 124, 139)

WHERE TO REACH THEM
- General search (60%), word of mouth (56%) and social media content (48%) are the leading planning sources.
- Among social media users, Facebook (81%), YouTube (75%) and Instagram (56%) lead.
- 64% are likely to use AI tools to plan their next trip. (See slides 68, 72, 76)

YOUNGER FRIENDS – AUTO/RV TOURING

ESTIMATED OPPORTUNITY POOL: 265,645

WHO THEY ARE
- Younger friend groups are newer tourers, more often introduced by friends than by family.
- 24% have children under 18 at home, and the largest age group is 35 to 44 (54%).
- 22% have been auto/RV touring for more than 10 years (below the segment's 37%), and 76% say it is central to who they are. (See slides 37, 47)

HOW THEY TRAVEL
- 64% have toured in Northern Ontario in the past five years, averaging 1.9 trips.
- Their most recent trip lasted 5.4 nights at $2,526 per party (below the segment's $3,615), and 67% stayed in paid roofed lodging.
- Hotels or motels (52%) and designated campgrounds (47%) are the preferred lodging options.
- Superior Country (36%) and Algoma Country (30%) are the most visited regions, and summer (77%) and spring (58%) the preferred seasons. (See slides 52, 136, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Bonding with friends or family (60%) and experiencing new places (58%) are the leading motivations.
- Escape from everyday stress matters less than in the segment overall (54% vs. 70%).
- Northern Lights viewing (50%) and scenic driving (46%) are the strongest add-on experiences. (See slides 82, 86)

WHAT THEY VALUE
- Conservation (89%) and supporting local businesses (84%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (67%) and paying more for a clear conservation benefit (72%) compare with 69% and 61% for the segment.
- 85% say a recognized certification or designation is important (the highest of any traveller type). (See slides 77, 107, 111)

WHAT HOLDS THEM BACK
- Cost (40%), weather or season timing (35%) and poor road, trail or water access (32%) are the leading barriers.
- Transportation costs is less of a concern (24% vs. 39%).
- 57% say financial pressures have affected their travel plans. (See slides 145, 147–148)

WHAT WOULD GROW THEM
- Quality paid accommodation (42%), better value (38%) and better RV hookups (35%) would most encourage longer stays.
- 75% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 18 (segment 26). (See slides 116, 124, 139)

WHERE TO REACH THEM
- Social media content (62%), word of mouth (43%) and general search (43%) are the leading planning sources.
- Among social media users, Instagram (79%), YouTube (71%) and Facebook (57%) lead.
- 74% are likely to use AI tools to plan their next trip. (See slides 68, 72, 76)

OLDER FRIENDS – AUTO/RV TOURING

ESTIMATED OPPORTUNITY POOL: 401,460

WHO THEY ARE
- Older friend groups are the most concerned about wildfires and safety, and the most likely to prefer hotels and lodges.
- 4% have children under 18 at home, and the largest age group is 55 to 64 (66%).
- 60% have been auto/RV touring for more than 10 years (the highest of any traveller type), and 79% say it is central to who they are. (See slides 37, 47)

HOW THEY TRAVEL
- 40% have toured in Northern Ontario in the past five years, averaging 0.8 trips.
- Their most recent trip lasted 6.1 nights at $2,390 per party (the lowest of any traveller type), and 77% stayed in paid roofed lodging.
- Hotels or motels (67%) and designated campgrounds (64%) are the preferred lodging options.
- Superior Country (17%) and Algoma Country (16%) are the most visited regions, and summer (79%) and fall (64%) the preferred seasons. (See slides 52, 136, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

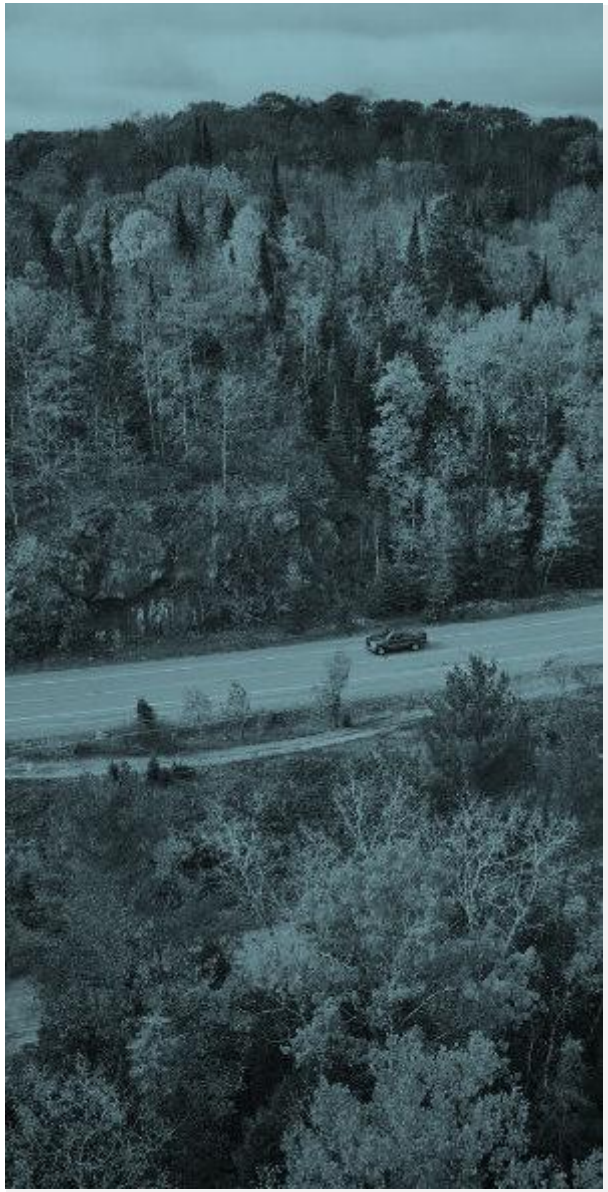
WHAT MOTIVATES THEM
- Experiencing new places (84%) and connection with nature (74%) are the leading motivations.
- Escape from everyday stress follows (73%).
- Northern Lights viewing (80%) and scenic driving (67%) are the strongest add-on experiences. (See slides 82–83, 86)

WHAT THEY VALUE
- Supporting local businesses (89%) and community benefit (81%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (75%) and paying more for a clear conservation benefit (42%) are lower than in the segment.
- 47% say a recognized certification or designation is important (the lowest of any traveller type). (See slides 77, 107, 111)

WHAT HOLDS THEM BACK
- Wildfires and other disruptions (65%), poor value for money (61%) and safety concerns (57%) are the leading barriers.
- 64% say financial pressures have affected their travel plans. (See slides 145, 148)

WHAT WOULD GROW THEM
- Better value (53%), improved access infrastructure (36%) and quality paid accommodation (35%) would most encourage longer stays.
- 57% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 7 (segment 26). (See slides 116, 124, 139)

WHERE TO REACH THEM
- Word of mouth (86%), general search (65%) and articles, blogs or videos (44%) are the leading planning sources.
- Among social media users, Facebook (88%), YouTube (78%) and Instagram (52%) lead.
- 53% are likely to use AI tools to plan their next trip. (See slides 68, 72, 76)



TRAVELLER & AVIDITY

YEARS AUTO/RV TOURING – MARKET

All auto/RV tourers

Over a third of auto/RV tourers (37%) have been auto/RV touring for more than 10 years. Just over half (53%) have been touring for 2 to 10 years, and one in ten (10%) for less than 2 years.

Rest of Canada tourers are the most likely to have been touring for more than 10 years (50%), while U.S. Drive tourers are less likely to have done so (32%).

Ontario tourers are the most likely to be newer to auto/RV touring, with 18% touring for less than 2 years.

Years auto/RV touring	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Less than 2 years	10%	18% ▲	7%	9%	10%
2 to 5 years	29%	26%	24%	32%	26%
6 to 10 years	24%	18%	18%	27%	30%
More than 10 years	37%	37%	50% ▲	32% ▼	34%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). A1 How many years have you been auto/RV touring as a hobby or recreational pursuit?

YEARS AUTO/RV TOURING – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Older friend groups (60%) and partners (51%) are the most likely to have been auto/RV touring for more than 10 years, compared with 37% overall.

Younger families (21%) and younger friend groups (22%) are less likely to have been touring for more than 10 years.

Younger families are instead more likely to have been touring for 2 to 5 years (38%) or 6 to 10 years (32%).

Years auto/RV touring	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Less than 2 years	10%	7%	9%	12%	11%	10%
2 to 5 years	29%	22%	38% ▲	25%	37%	17%
6 to 10 years	24%	19%	32% ▲	20%	31%	14%
More than 10 years	37%	51% ▲	21% ▼	43%	22% ▼	60% ▲

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

Base: all auto/RV tourers (n=1,108). A1 How many years have you been auto/RV touring as a hobby or recreational pursuit?

VEHICLE USED MOST OFTEN FOR AUTO/RV TOURING – MARKET

All auto/RV tourers

Two-thirds of auto/RV tourers (66%) most often use a car or SUV with no trailer or RV. About a quarter each use a pickup truck (28%), a motorhome (26%) or a travel trailer or fifth wheel (24%).

Ontario tourers are the most likely to use a car or SUV (78%).

Rest of Canada tourers are less likely than other markets to use a truck camper (2%, compared with 7% overall).

Vehicle	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Car or SUV (no trailer/RV)	66%	78%	56%	67%	72%
Pickup truck	28%	23%	24%	29%	36%
Motorhome / Class A, B, or C RV	26%	21%	18%	28%	35%
Travel trailer or fifth wheel	24%	13%	27%	25%	26%
Truck camper	7%	9%	2% ▼	9%	10%
Other	1%	0%	2%	<1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). A2 Which of the following best describes the vehicle you most often use for auto/RV touring trips? Please select all that apply.

"Not sure" (0%) not shown.

Note: Respondents could select more than one vehicle, so results add to more than 100%.

VEHICLE USED MOST OFTEN FOR AUTO/RV TOURING – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use a pickup truck (36%) or a motorhome (34%).

Older friend groups are the least likely to use a motorhome (7%) and the most likely to use a car or SUV (73%).

Vehicle	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Car or SUV (no trailer/RV)	66%	62%	68%	64%	67%	73%
Pickup truck	28%	28%	36% ▲	27%	21%	19%
Motorhome / Class A, B, or C RV	26%	19%	34% ▲	28%	32%	7% ▼
Travel trailer or fifth wheel	24%	25%	29%	23%	21%	21%
Truck camper	7%	2%	10%	8%	11%	7%
Other	1%	2%	<1%	0%	0%	2%

Note: Respondents could select more than one vehicle, so results add to more than 100%.

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

Base: all auto/RV tourers (n=1,108). A2 Which of the following best describes the vehicle you most often use for auto/RV touring trips? Please select all that apply.

"Not sure" (0%) not shown.

VEHICLE OWNERSHIP – MARKET

All auto/RV tourers

Nine in ten auto/RV tourers (92%) own their vehicle. Few lease (4%) or rent or borrow when needed (3%).

Ownership is high in every market, from 88% among Ontario tourers to 94% among U.S. Fly tourers.

Ontario tourers are the most likely to lease (9%).

Ownership	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Own	92%	88%	92%	92%	94%
Lease	4%	9%	5%	3%	5%
Rent or borrow when needed	3%	4%	2%	4%	1%
Other	<1%	0%	0%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). A2B Do you own, lease, or rent your vehicle?

VEHICLE OWNERSHIP – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Ownership ranges from 83% among younger friend groups to 95% among older friend groups.

Younger friend groups are the most likely to lease (10%) or to rent or borrow when needed (7%).

Ownership	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Own	92%	90%	93%	93%	83%	95%
Lease	4%	6%	5%	3%	10%	3%
Rent or borrow when needed	3%	3%	2%	4%	7%	2%
Other	<1%	2%	<1%	<1%	0%	0%

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

Base: all auto/RV tourers (n=1,108). A2B Do you own, lease, or rent your vehicle?

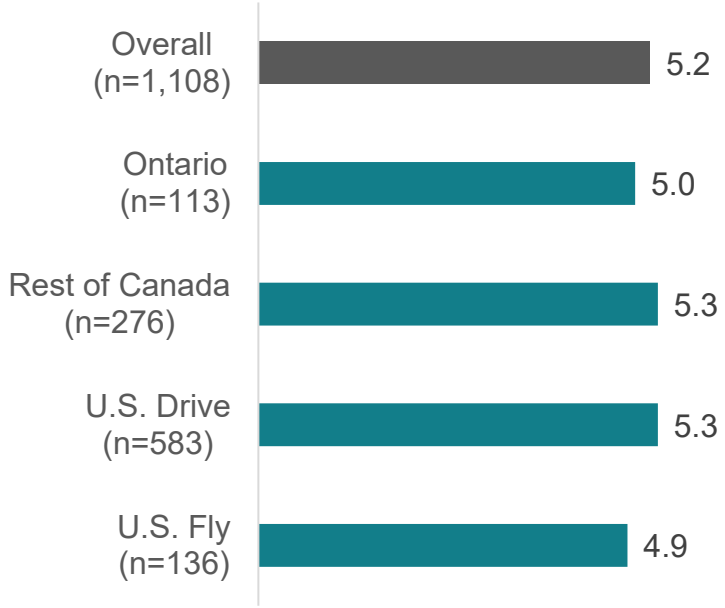
AUTO/RV TOURING TRIPS PER YEAR

All auto/RV tourers | Traveller types are defined on slide 10

Auto/RV tourers take an average of 5.2 overnight trips per year where auto/RV touring is the primary purpose.

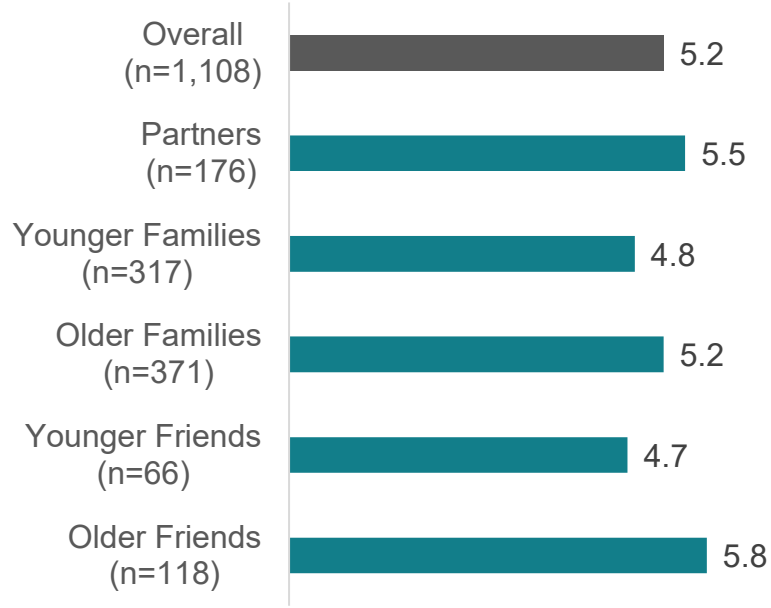
Averages are similar across markets, from 4.9 trips among U.S. Fly tourers to 5.3 among Rest of Canada and U.S. Drive tourers. Older friend groups (5.8) and partners (5.5) average the most trips among traveller types, while younger friend groups (4.7) and younger families (4.8) average the fewest.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers (n=1,108). A3 Approximately how many overnight trips per year do you take where auto/RV touring is the primary purpose? AVG = average number of overnight trips per year.

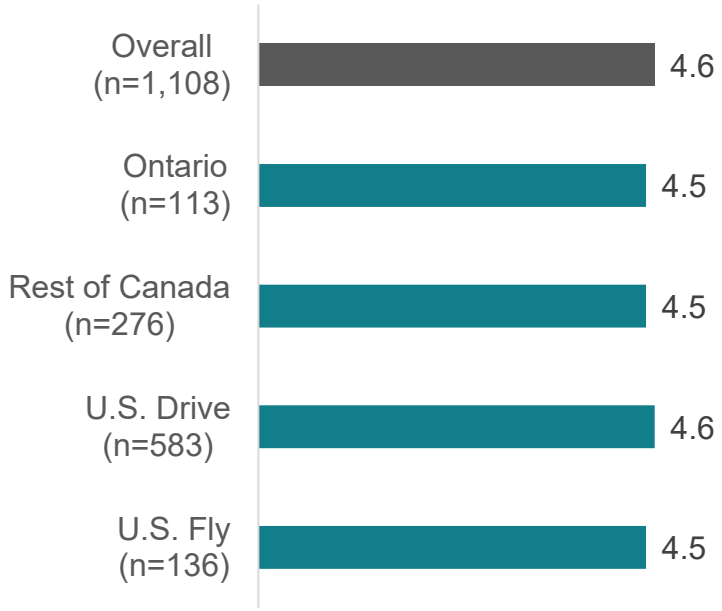
NIGHTS PER AUTO/RV TOURING TRIP

All auto/RV tourers | Traveller types are defined on slide 10

Auto/RV tourers typically spend an average of 4.6 nights on an auto/RV touring trip.

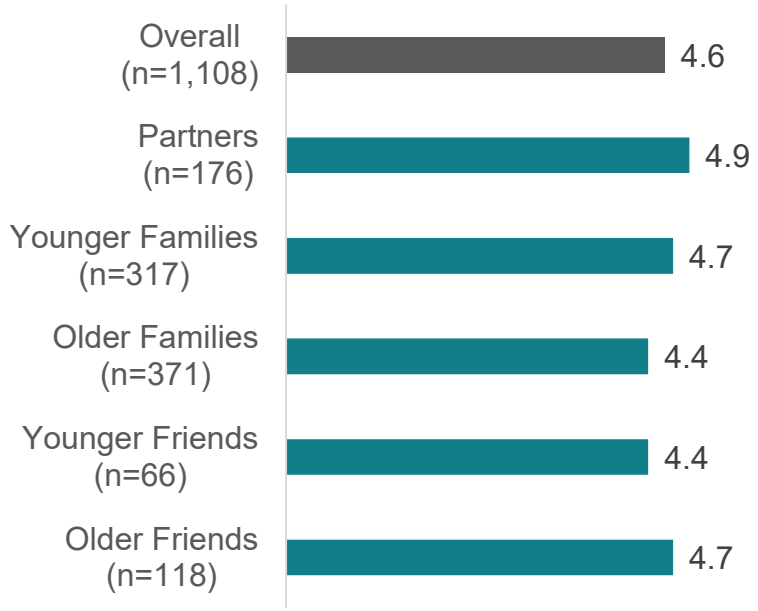
Trip length is consistent across markets, from 4.5 to 4.6 nights. Partners take the longest trips among traveller types (4.9 nights), while older families and younger friend groups take the shortest (4.4 nights each).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers (n=1,108). A4 How many nights do you typically spend on an auto/RV touring trip? AVG = average number of nights.

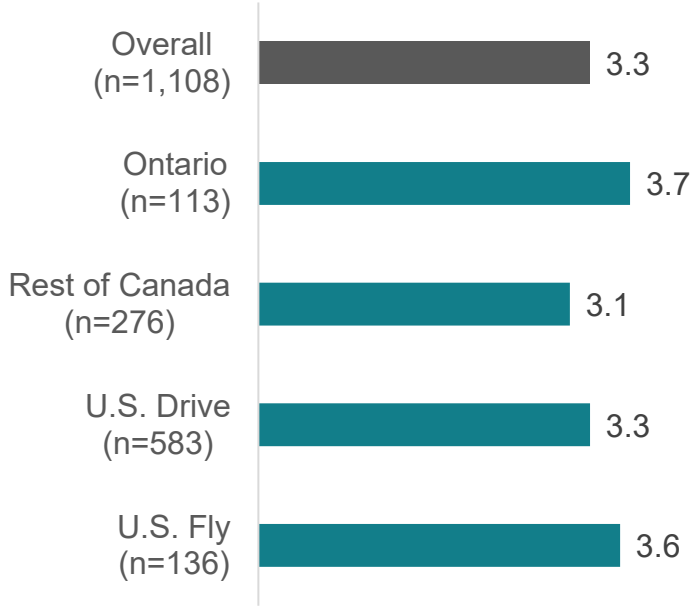
NUMBER OF PEOPLE TRAVELLED WITH ON AUTO/RV TOURING TRIPS

All auto/RV tourers | Traveller types are defined on slide 10

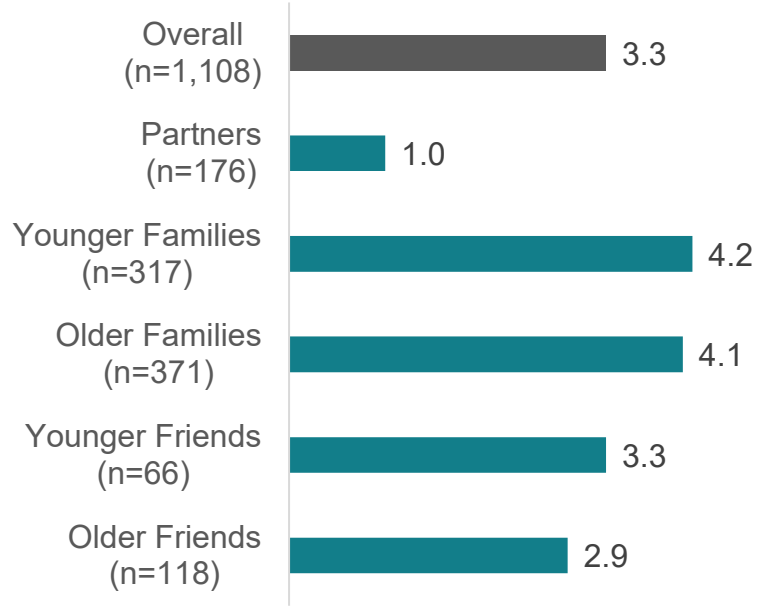
Auto/RV tourers typically travel with an average of 3.3 people on an auto/RV touring trip.

Families travel in the largest groups, with younger families averaging 4.2 people and older families 4.1. Partners average 1.0 people, consistent with travelling as a couple. Among markets, Ontario (3.7) and U.S. Fly (3.6) tourers report the largest groups.

MARKET



TRAVELLER TYPE



Base: all auto/RV tourers (n=1,108). A5 How many people do you typically travel with on an auto/RV touring trip? AVG = sum of the average number of people reported for each category (partner or spouse, friends, children, other). Significance testing is not available for the combined average.

FIRST EXPOSURE TO AUTO/RV TOURING – MARKET

All auto/RV tourers

More than half of auto/RV tourers (56%) got their first exposure to auto/RV touring through a family member. About one in five discovered it on their own (22%) or through friends or peers (18%).

A family member is the most common source in every market, from 50% among Ontario tourers to 58% among Rest of Canada tourers.

Ontario tourers are the most likely to have been introduced by friends or peers (28%).

First exposure	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
A family member	56%	50%	58%	55%	57%
School, camp, or organized program	3%	2%	1%	3%	4%
Friends or peers	18%	28%	13%	19%	19%
I discovered it on my own	22%	19%	26%	22%	20%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). A9 Where did you get your first exposure to auto/RV touring? "Not sure" (1%) not shown.

FIRST EXPOSURE TO AUTO/RV TOURING – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Younger friend groups are more likely than other traveller types to have been introduced to auto/RV touring by friends or peers (46%, compared with 18% overall).

A family member is the most common source of first exposure for every other traveller type, led by younger and older families (59% each).

First exposure	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
A family member	56%	53%	59%	59%	42%	53%
School, camp, or organized program	3%	1%	4%	2%	4%	1%
Friends or peers	18%	19%	18%	13%	46% ▲	22%
I discovered it on my own	22%	25%	19%	25%	7%	24%

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

Base: all auto/RV tourers (n=1,108). A9 Where did you get your first exposure to auto/RV touring? "Not sure" (1%) not shown.

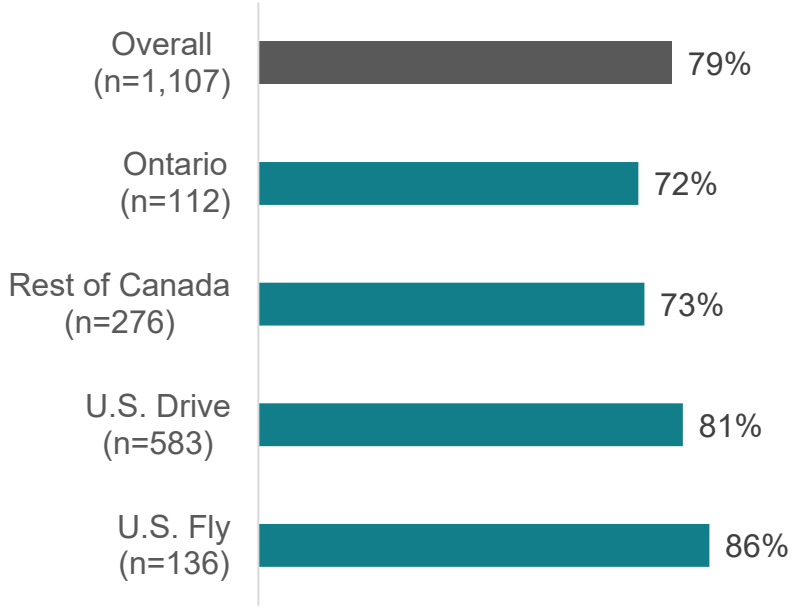
AUTO/RV TOURING AS A CENTRAL PART OF IDENTITY

All auto/RV tourers | Traveller types are defined on slide 10

Eight in ten auto/RV tourers (79%) agree that auto/RV touring and vehicle culture is a central part of who they are, including 38% who strongly agree.

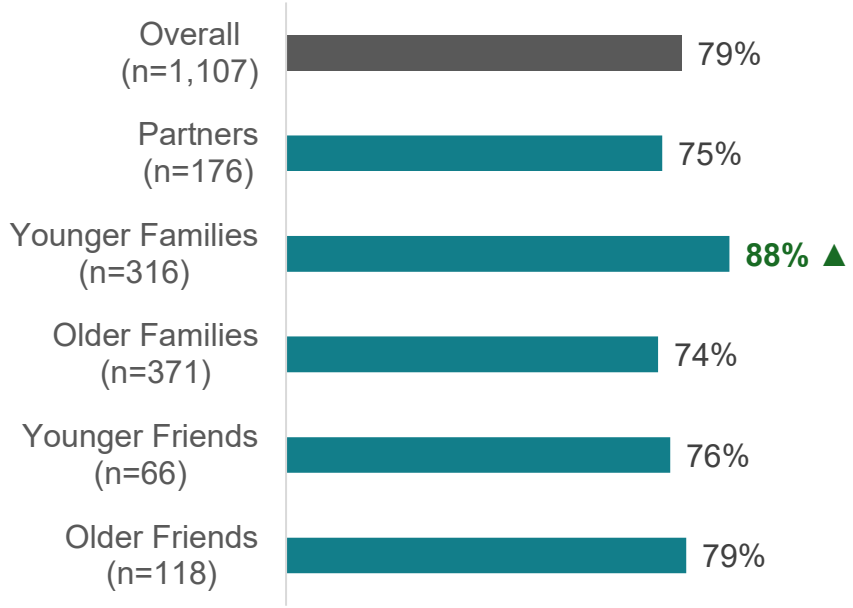
Agreement ranges from 72% among Ontario tourers to 86% among U.S. Fly tourers. Younger families agree at a higher rate than other traveller types (88%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,107). T2 (TOP2) How much do you agree or disagree with the following statement? “Auto/RV touring and vehicle culture is a central part of who I am.” TOP2 = % somewhat or strongly agree.

ROLE OF AUTO/RV TOURING IN TRAVEL DECISIONS – MARKET

All auto/RV tourers

More than three-quarters of auto/RV tourers (77%) say auto/RV touring is always (28%) or usually (49%) the primary purpose of their trips.

U.S. Fly tourers are the most likely to say it is always the primary purpose (37%), and Rest of Canada tourers the least likely (21%).

One in four Rest of Canada tourers (25%) say it is often a secondary activity alongside other trip purposes.

Role in travel decisions	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
It is always the primary purpose of my trips	28%	25%	21%	30%	37%
It is usually the primary purpose, but not always	49%	45%	49%	51%	45%
It is often a secondary activity alongside other trip purposes	19%	22%	25%	16%	16%
It is rarely the primary purpose of my trips	3%	8%	5%	2%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). T2B Which of the following best describes the role auto/RV touring plays in your travel decisions?

“Not sure” (<1%) not shown.

ROLE OF AUTO/RV TOURING IN TRAVEL DECISIONS – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to say auto/RV touring is always the primary purpose of their trips (41%, compared with 28% overall).

Younger families are also less likely to say it is often a secondary activity (13%).

Older friend groups are the least likely to say it is always the primary purpose (16%).

Role in travel decisions	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
It is always the primary purpose of my trips	28%	22%	41% ▲	25%	22%	16%
It is usually the primary purpose, but not always	49%	54%	43%	50%	48%	54%
It is often a secondary activity alongside other trip purposes	19%	19%	13% ▼	21%	24%	26%
It is rarely the primary purpose of my trips	3%	3%	2%	3%	7%	4%

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

Base: all auto/RV tourers (n=1,108). T2B Which of the following best describes the role auto/RV touring plays in your travel decisions?

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



HOW THEY TRAVEL

PREFERRED SEASON FOR AUTO/RV TOURING – MARKET

All auto/RV tourers

Summer is the preferred season for auto/RV touring (80%), followed by fall (64%) and spring (56%). Fewer than one in five auto/RV tourers (18%) prefer winter.

U.S. Fly tourers are the most likely to prefer winter (37%) but the least likely to prefer summer (70%). Rest of Canada tourers are the least likely to prefer winter (9%).

U.S. Drive tourers are more likely to prefer spring (63%), while Ontario (38%) and Rest of Canada (45%) tourers are less likely to.

Season	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Winter (December – February)	18%	12%	9% ▼	19%	37% ▲
Spring (March – May)	56%	38% ▼	45% ▼	63% ▲	62%
Summer (June – August)	80%	79%	85%	79%	70% ▼
Fall (September – November)	64%	62%	61%	65%	64%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). T1 What is your preferred season for taking an auto/RV touring trip? Please select all that apply.

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

PREFERRED SEASON FOR AUTO/RV TOURING – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Summer is the top season for every traveller type, from 74% among partners to 82% among younger families.

Partners are more likely than other traveller types to prefer fall (77%).

Younger families are more likely to prefer winter (24%).

Season	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Winter (December – February)	18%	15%	24% ▲	16%	14%	11%
Spring (March – May)	56%	62%	55%	57%	58%	44%
Summer (June – August)	80%	74%	82%	80%	77%	79%
Fall (September – November)	64%	77% ▲	60%	62%	52%	64%

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

Base: all auto/RV tourers (n=1,108). T1 What is your preferred season for taking an auto/RV touring trip? Please select all that apply.

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

HOW AUTO/RV TOURERS GET TO THEIR DESTINATIONS – MARKET

All auto/RV tourers

Three-quarters of auto/RV tourers (76%) typically get to their destinations by personal vehicle. A third travel by RV or motorhome (33%) or by personal vehicle with a trailer (30%).

U.S. Fly tourers are more likely to travel by RV or motorhome (46%) and by float plane or charter flight to a remote destination (11%).

U.S. Drive tourers are more likely to travel with a trailer (34%), while Rest of Canada tourers are less likely to (19%).

Mode of travel	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Personal vehicle (car, truck, SUV)	76%	82%	77%	73%	80%
RV / motorhome	33%	22%	26%	34%	46% ▲
Personal vehicle with trailer (e.g., boat, camper, ATV)	30%	25%	19% ▼	34% ▲	34%
Fly to a regional hub, then drive	14%	15%	15%	13%	18%
Float plane or charter flight to a remote destination	5%	3%	2%	5%	11% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). T3 How do you typically get to your auto/RV touring destinations? Please select all that apply.

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

HOW AUTO/RV TOURERS GET TO THEIR DESTINATIONS – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to travel by RV or motorhome (40%), with a trailer (40%) or by float plane or charter flight (9%).

Older friend groups are the most likely to use a personal vehicle (84%) and the least likely to use an RV or motorhome (19%).

Mode of travel	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Personal vehicle (car, truck, SUV)	76%	78%	75%	74%	71%	84%
RV / motorhome	33%	29%	40% ▲	32%	36%	19%
Personal vehicle with trailer (e.g., boat, camper, ATV)	30%	23%	40% ▲	27%	31%	23%
Fly to a regional hub, then drive	14%	13%	14%	13%	18%	24%
Float plane or charter flight to a remote destination	5%	2%	9% ▲	3%	7%	2%

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

Base: all auto/RV tourers (n=1,108). T3 How do you typically get to your auto/RV touring destinations? Please select all that apply.

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

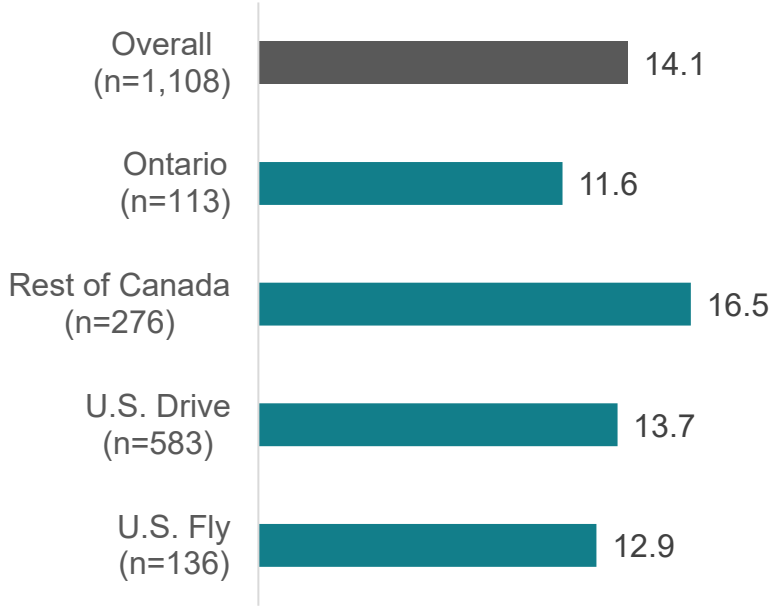
HOURS WILLING TO TRAVEL FOR AN AUTO/RV TOURING TRIP

All auto/RV tourers | Traveller types are defined on slide 10

Auto/RV tourers are willing to travel an average of 14.1 hours one way for an auto/RV touring trip.

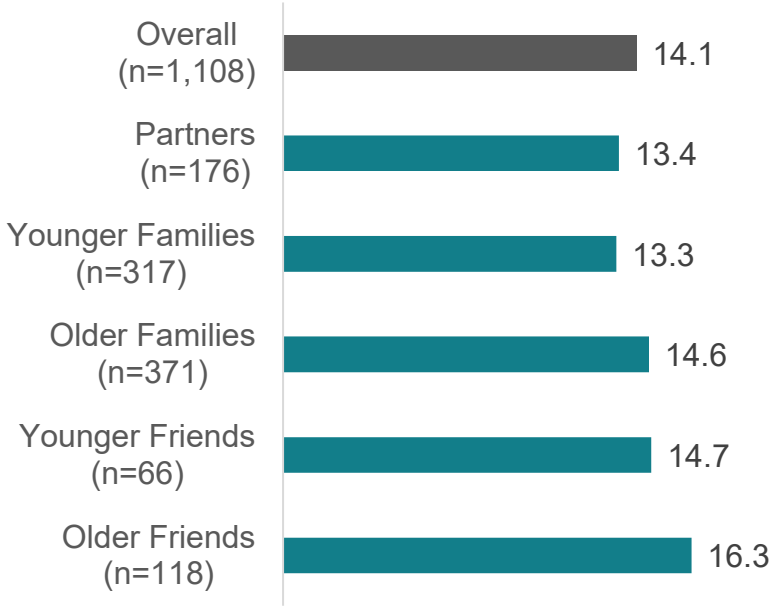
Rest of Canada tourers are willing to travel the farthest (16.5 hours) and Ontario tourers the least (11.6 hours). Among traveller types, older friend groups are willing to travel the farthest (16.3 hours), while younger families (13.3) and partners (13.4) report the fewest hours.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers (n=1,108). T4 Approximately how many hours are you willing to travel (one way) for an auto/RV touring trip? AVG = average number of hours.

APPROACH TO GEAR AND OUTFITTER USE – MARKET

All auto/RV tourers

Just over half of auto/RV tourers (53%) have their own gear or vehicle and do not use local outfitters or rental operators. Four in ten (40%) also use local outfitters or rental operators, and 6% rely on outfitters, rental operators or marinas for most knowledge, supplies and services.

Rest of Canada tourers are more likely to have their own gear or vehicle and not use local outfitters or rental operators (70%), and less likely to also use them (28%).

Ontario tourers are less likely to rely on their own gear or vehicle alone (38%) and more likely to rely on outfitters, rental operators or marinas (13%).

Approach	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	53%	38% ▼	70% ▲	50%	47%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	40%	43%	28% ▼	43%	48%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	6%	13% ▲	2%	6%	4%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). T5 Which of the following best describes your approach to auto/RV touring gear/vehicle and outfitter or rental operator use on overnight trips?

"Not sure" (1%) not shown.

APPROACH TO GEAR AND OUTFITTER USE – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Partners are the most likely to have their own gear or vehicle and not use local outfitters or rental operators (62%), while younger friend groups are the least likely (38%).

Younger friend groups are the most likely to also use local outfitters or rental operators (51%).

Approach	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	53%	62%	51%	52%	38%	53%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	40%	35%	45%	39%	51%	33%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	6%	2%	4%	7%	10%	8%

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

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

Base: all auto/RV tourers (n=1,108). T5 Which of the following best describes your approach to auto/RV touring gear/vehicle and outfitter or rental operator use on overnight trips?

"Not sure" (1%) not shown.

INDEPENDENT VS. GUIDED AUTO/RV TOURING – MARKET

All auto/RV tourers

Two-thirds of auto/RV tourers (66%) mainly go on their own or with their own group, fully self-guided. About three in ten (31%) use a mix of guided and self-guided, and 3% mainly use guided or outfitted experiences.

Rest of Canada tourers are more likely to go fully self-guided (80%) and less likely to use a mix (19%).

U.S. Drive tourers are less likely to go fully self-guided (62%) and more likely to use a mix of guided and self-guided (35%).

Approach	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
I mainly go on my own or with my own group – fully self-guided	66%	61%	80% ▲	62% ▼	61%
I use a mix of guided and self-guided	31%	32%	19% ▼	35% ▲	37%
I mainly use guided or outfitted experiences provided by operators	3%	5%	1%	3%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). T6 When you go on an auto/RV touring trip, do you mainly go independently or use guided/outfitted experiences?

“Not sure” (1%) not shown.

INDEPENDENT VS. GUIDED AUTO/RV TOURING – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Partners are more likely than other traveller types to go fully self-guided (79%) and less likely to use a mix of guided and self-guided (19%).

Younger families are less likely to go fully self-guided (60%) and more likely to use a mix (38%).

Younger friend groups are the most likely to use a mix (40%).

Approach	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
I mainly go on my own or with my own group – fully self-guided	66%	79% ▲	60% ▼	64%	56%	70%
I use a mix of guided and self-guided	31%	19% ▼	38% ▲	32%	40%	24%
I mainly use guided or outfitted experiences provided by operators	3%	1%	2%	3%	3%	4%

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

Base: all auto/RV tourers (n=1,108). T6 When you go on an auto/RV touring trip, do you mainly go independently or use guided/outfitted experiences?

"Not sure" (1%) not shown.

PREFERRED TOURING STYLE – MARKET

All auto/RV tourers

Six in ten auto/RV tourers (60%) prefer mostly self-guided, independent touring. A third (33%) prefer a mix of both, and 6% prefer mostly guided or packaged tours.

Rest of Canada tourers are more likely to prefer mostly self-guided, independent touring (78%) and less likely to prefer a mix of both (19%).

U.S. Fly (44%) and U.S. Drive (38%) tourers are more likely to prefer a mix of both and less likely to prefer mostly self-guided, independent touring (47% and 55%).

Touring style	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Mostly self-guided, independent touring	60%	61%	78% ▲	55% ▼	47% ▼
Mostly guided or packaged tours	6%	10%	3%	6%	7%
A mix of both	33%	26%	19% ▼	38% ▲	44% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). N9D Which of the following best describes your preferred touring style? "Not sure" (1%) not shown.

PREFERRED TOURING STYLE – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

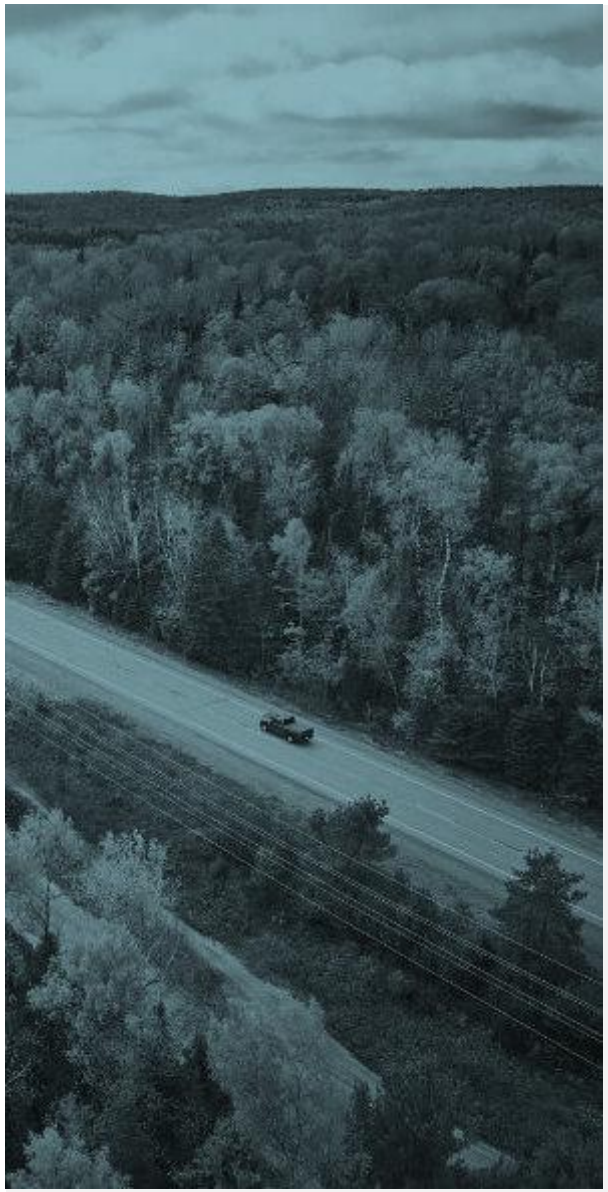
Partners are more likely than other traveller types to prefer mostly self-guided, independent touring (74%), while younger families are more likely to prefer a mix of both (44%).

Younger families are also less likely to prefer self-guided, independent touring (50%).

Touring style	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Mostly self-guided, independent touring	60%	74% ▲	50% ▼	60%	49%	69%
Mostly guided or packaged tours	6%	3%	5%	7%	10%	4%
A mix of both	33%	23%	44% ▲	33%	41%	27%

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

Base: all auto/RV tourers (n=1,108). N9D Which of the following best describes your preferred touring style? "Not sure" (1%) not shown.



PLANNING & BOOKING

PLANNING LEAD TIME FOR AUTO/RV TOURING TRIPS – MARKET

All auto/RV tourers

Two-thirds of auto/RV tourers (68%) start planning 1 to 3 months (34%) or 3 to 6 months (34%) in advance. About one in five (22%) plan 6 months or more ahead, and one in ten (10%) less than 1 month ahead.

Ontario tourers are less likely than other markets to plan 6 to 12 months in advance (5%). Most Ontario tourers plan 1 to 3 months (42%) or 3 to 6 months (38%) ahead.

Planning lead time	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Less than 1 month	10%	12%	12%	9%	8%
1 to 3 months	34%	42%	36%	30%	38%
3 to 6 months	34%	38%	26%	37%	37%
6 to 12 months	18%	5% ▼	22%	19%	13%
More than 12 months in advance	4%	2%	4%	5%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). B1 How far in advance do you typically start planning an auto/RV touring trip? "Not sure" (<1%) not shown.

PLANNING LEAD TIME FOR AUTO/RV TOURING TRIPS – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are less likely than other traveller types to plan 6 to 12 months in advance (12%).

Older friend groups are the most likely to plan 1 to 3 months ahead (49%), and partners the most likely to plan 6 to 12 months ahead (24%).

Planning lead time	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Less than 1 month	10%	10%	12%	9%	12%	6%
1 to 3 months	34%	27%	35%	31%	32%	49%
3 to 6 months	34%	32%	38%	35%	33%	23%
6 to 12 months	18%	24%	12% ▼	20%	20%	16%
More than 12 months in advance	4%	6%	3%	4%	2%	5%

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

Base: all auto/RV tourers (n=1,108). B1 How far in advance do you typically start planning an auto/RV touring trip? "Not sure" (<1%) not shown.

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

All auto/RV tourers

General internet search (59%) and word of mouth (57%) are the most common sources auto/RV tourers use for inspiration and planning, followed by social media content (45%), online travel booking or review sites (43%) and official tourism websites (42%).

About a third use articles, blogs or videos about travel destinations (32%) or AI tools (32%).

Word of mouth is highest among Ontario tourers (68%), and AI tools among U.S. Fly tourers (41%).

Source	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
General internet search (e.g., Google, Bing)	59%	56%	62%	59%	56%
Word of mouth (e.g., friends or family)	57%	68%	63%	54%	46%
Social media content (e.g., Instagram, Facebook, YouTube)	45%	54%	42%	45%	41%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	43%	37%	40%	45%	45%
Official tourism websites (e.g., national, provincial, state, regional, city)	42%	33%	44%	42%	45%
Articles, blogs, or videos about travel destinations	32%	32%	31%	31%	39%
AI tools (e.g., ChatGPT, Gemini, Copilot)	32%	24%	30%	33%	41%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). B4 Which of the following do you use to find inspiration or plan your auto/RV touring trips? Please select all that apply.

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

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

All auto/RV tourers

Between one in seven and three in ten auto/RV tourers use each of the next group of sources, led by travel information or visitor centres (29%), TV shows or documentaries (28%) and magazines, travel guides or brochures (27%).

Ontario tourers are the least likely to use magazines, travel guides or brochures (14%).

Source	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Travel information centres or visitor centres	29%	19%	29%	32%	27%
TV shows or documentaries	28%	27%	28%	29%	26%
Magazines, travel guides or brochures	27%	14%	27%	30%	29%
Social media influencers	21%	19%	14%	23%	27%
Forums or online communities	18%	20%	20%	15%	26%
Outfitter or lodge websites	17%	13%	14%	19%	22%
Outdoor or sporting magazines or publications	16%	7%	14%	18%	19%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	14%	11%	13%	14%	21%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). B4 Which of the following do you use to find inspiration or plan your auto/RV touring trips? Please select all that apply.

“Not sure” (<1%) not shown.

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

All auto/RV tourers

One in ten auto/RV tourers or fewer use travel agents (10%), consumer shows or exhibitions (10%), club or association newsletters or websites (9%), travel-related phone lines (9%), email newsletters (8%) or rally or event calendars (7%).

Rest of Canada tourers are less likely than other markets to use travel agents (3%).

Source	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Travel agents	10%	12%	3% ▼	12%	16%
Consumer shows/exhibitions	10%	8%	12%	9%	15%
Club or association newsletters or websites	9%	8%	6%	9%	15%
Travel-related phone lines or hotlines	9%	10%	6%	9%	14%
Email newsletters	8%	5%	2%	10%	13%
Rally or event calendars	7%	5%	7%	8%	11%
Other	1%	0%	2%	<1%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). B4 Which of the following do you use to find inspiration or plan your auto/RV touring trips? Please select all that apply.

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

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

All auto/RV tourers | Traveller types are defined on slide 10

Partners are more likely than other traveller types to use general internet search (72%), and older friend groups are more likely to rely on word of mouth (86%).

Younger families are less likely to use general internet search (49%), and younger friend groups are less likely to use official tourism websites (23%).

Source	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
General internet search (e.g., Google, Bing)	59%	72% ▲	49% ▼	60%	43%	65%
Word of mouth (e.g., friends or family)	57%	55%	50%	56%	43%	86% ▲
Social media content (e.g., Instagram, Facebook, YouTube)	45%	39%	46%	48%	62%	38%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	43%	39%	46%	46%	39%	36%
Official tourism websites (e.g., national, provincial, state, regional, city)	42%	50%	41%	43%	23% ▼	36%
Articles, blogs, or videos about travel destinations	32%	26%	30%	35%	22%	44%
AI tools (e.g., ChatGPT, Gemini, Copilot)	32%	28%	39%	32%	28%	32%

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

Base: all auto/RV tourers (n=1,108). B4 Which of the following do you use to find inspiration or plan your auto/RV touring trips? Please select all that apply.

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

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

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use social media influencers (29%) and specialized apps (22%).

Older friend groups are the most likely to use TV shows or documentaries (44%) and magazines, travel guides or brochures (43%).

Source	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Travel information centres or visitor centres	29%	34%	26%	30%	22%	28%
TV shows or documentaries	28%	24%	25%	27%	37%	44%
Magazines, travel guides or brochures	27%	34%	21%	27%	19%	43%
Social media influencers	21%	15%	29% ▲	19%	23%	15%
Forums or online communities	18%	14%	18%	19%	22%	19%
Outfitter or lodge websites	17%	9%	18%	19%	15%	20%
Outdoor or sporting magazines or publications	16%	14%	20%	13%	21%	20%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	14%	11%	22% ▲	10%	15%	9%

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

Base: all auto/RV tourers (n=1,108). B4 Which of the following do you use to find inspiration or plan your auto/RV touring trips? Please select all that apply.

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

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

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use travel-related phone lines or hotlines (16%).

Use of each of the other sources on this slide is 16% or lower for every traveller type.

Source	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Travel agents	10%	8%	14%	9%	10%	9%
Consumer shows/exhibitions	10%	4%	14%	9%	11%	13%
Club or association newsletters or websites	9%	6%	11%	7%	8%	13%
Travel-related phone lines or hotlines	9%	4%	16% ▲	7%	13%	7%
Email newsletters	8%	10%	8%	8%	8%	5%
Rally or event calendars	7%	7%	8%	4%	10%	12%
Other	1%	3%	0%	0%	3%	1%

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

Base: all auto/RV tourers (n=1,108). B4 Which of the following do you use to find inspiration or plan your auto/RV touring trips? Please select all that apply.

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

SOCIAL MEDIA PLATFORMS USED FOR TRIP INFORMATION – MARKET

Auto/RV tourers who use social media to plan

Facebook (79%) and YouTube (76%) are the most used social media platforms for auto/RV touring information, followed by Instagram (61%) and TikTok (44%).

U.S. Fly tourers are more likely than other markets to use Instagram (75%), X (44%), WhatsApp (32%), Snapchat (29%) and Threads (23%).

Rest of Canada tourers are less likely to use TikTok (28%) and X (3%).

Platform	Overall (n=588)	Ontario (n=67)	Rest of Canada (n=132)	U.S. Drive (n=317)	U.S. Fly (n=72)
Facebook	79%	70%	81%	80%	80%
YouTube	76%	76%	68%	77%	82%
Instagram	61%	62%	65%	55%	75% ▲
TikTok	44%	40%	28% ▼	49%	53%
Reddit	32%	22%	29%	32%	44%
X (formerly known as Twitter)	22%	19%	3% ▼	26%	44% ▲
Pinterest	22%	17%	15%	24%	31%
WhatsApp	19%	20%	15%	17%	32% ▲
Snapchat	14%	13%	5%	15%	29% ▲
Threads	12%	7%	9%	11%	23% ▲
Other	<1%	2%	1%	0%	<1%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who use social media to plan (B4) (n=588). B4B Which social media platforms do you use to obtain information about your auto/RV touring trips? Please select all that apply.

"Not sure" (1%) not shown.

SOCIAL MEDIA PLATFORMS USED FOR TRIP INFORMATION – TRAVELLER TYPE

Auto/RV tourers who use social media to plan | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use Instagram (74%), TikTok (59%), Reddit (40%), X (32%) and Snapchat (21%).

Partners are less likely to use Reddit (13%), and younger friend groups are less likely to use Facebook (57%).

Platform	Overall (n=588)	Partners (n=76)	Younger Families (n=189)	Older Families (n=205)	Younger Friends (n=45)	Older Friends (n=49)
Facebook	79%	82%	79%	81%	57% ▼	88%
YouTube	76%	73%	78%	75%	71%	78%
Instagram	61%	43%	74% ▲	56%	79%	52%
TikTok	44%	32%	59% ▲	37%	43%	37%
Reddit	32%	13% ▼	40% ▲	29%	41%	30%
X (formerly known as Twitter)	22%	8%	32% ▲	18%	25%	19%
Pinterest	22%	21%	27%	22%	16%	16%
WhatsApp	19%	6%	25%	19%	18%	14%
Snapchat	14%	3%	21% ▲	12%	7%	19%
Threads	12%	6%	15%	12%	13%	7%
Other	<1%	0%	<1%	1%	1%	0%

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

Base: auto/RV tourers who use social media to plan (B4) (n=588). B4B Which social media platforms do you use to obtain information about your auto/RV touring trips? Please select all that apply.

"Not sure" (1%) not shown.

HOW AUTO/RV TOURING TRIPS ARE BOOKED – MARKET

All auto/RV tourers

Booking directly with accommodation providers (58%) is the most common way auto/RV tourers book trips, followed by booking directly with an RV park or campground (52%) and through an online booking platform (50%).

U.S. Fly tourers are more likely than other markets to book through a travel agent or tour operator (24%) or through a sporting or outdoor club or association (17%).

Ontario tourers are the least likely to book directly with an RV park or campground (39%).

Booking method	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Directly with accommodation providers (lodge, hotel, cottage)	58%	57%	60%	57%	61%
Directly with an RV park or campground	52%	39%	54%	53%	58%
Through an online booking platform (e.g., Booking.com, Expedia)	50%	58%	49%	48%	53%
Informally through friends or personal contacts	23%	26%	27%	21%	25%
Directly with outfitters or guides	19%	12%	11%	22%	23%
Through a travel agent or tour operator	14%	13%	7%	16%	24% ▲
Through a sporting or outdoor club or association	8%	7%	3%	9%	17% ▲
Other	<1%	0%	1%	<1%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). B2 How do you typically book your auto/RV touring trips? Please select all that apply.

"Not sure" (1%) not shown.

HOW AUTO/RV TOURING TRIPS ARE BOOKED – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to book through a travel agent or tour operator (23%) or through a sporting or outdoor club or association (13%).

Younger friend groups are also more likely to book through a club or association (21%), but less likely to book directly with accommodation providers (36%).

Partners are less likely to book directly with outfitters or guides (7%).

Booking method	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Directly with accommodation providers (lodge, hotel, cottage)	58%	62%	56%	57%	36% ▼	75%
Directly with an RV park or campground	52%	53%	57%	51%	44%	51%
Through an online booking platform (e.g., Booking.com, Expedia)	50%	41%	54%	46%	55%	61%
Informally through friends or personal contacts	23%	18%	28%	21%	36%	30%
Directly with outfitters or guides	19%	7% ▼	23%	21%	27%	14%
Through a travel agent or tour operator	14%	8%	23% ▲	13%	16%	6%
Through a sporting or outdoor club or association	8%	3%	13% ▲	6%	21% ▲	5%
Other	<1%	1%	1%	0%	<1%	0%

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

Base: all auto/RV tourers (n=1,108). B2 How do you typically book your auto/RV touring trips? Please select all that apply.

"Not sure" (1%) not shown.

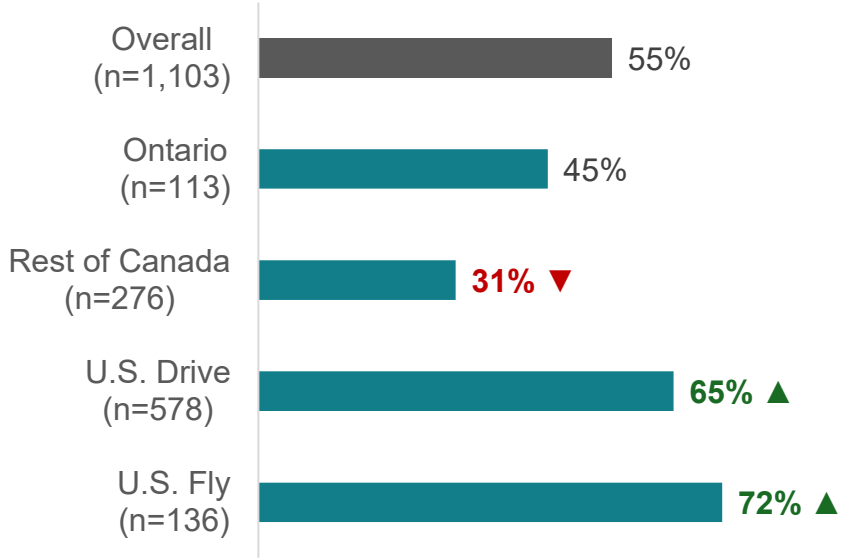
IMPORTANCE OF WORKING WITH LOCAL OPERATORS

All auto/RV tourers | Traveller types are defined on slide 10

Just over half of auto/RV tourers (55%) say working with a local outfitter, guide, rental operator, marina or accommodation provider is important when planning a trip.

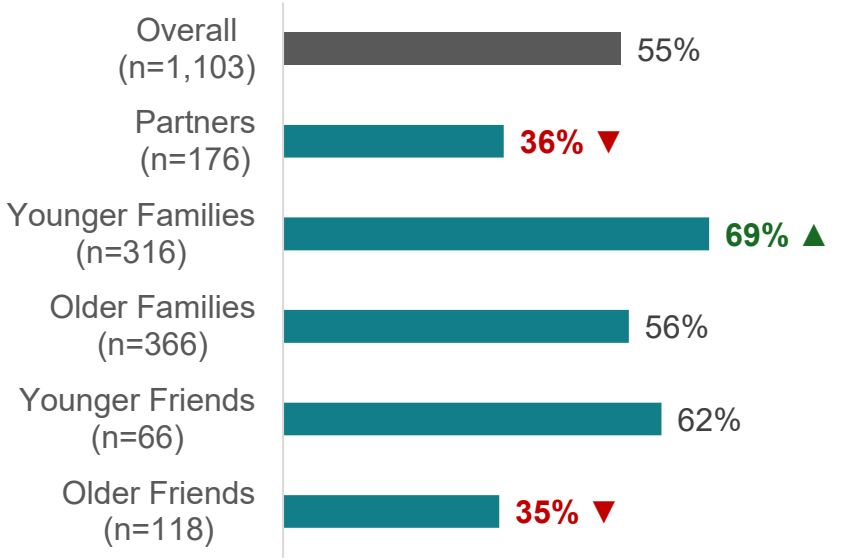
Importance is higher among U.S. Fly (72%) and U.S. Drive (65%) tourers and lower among Rest of Canada tourers (31%). Younger families (69%) place more importance on it than other traveller types, while partners (36%) and older friend groups (35%) place less.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,103). B3 (TOP2) When planning an auto/RV touring trip, how important is working with a local outfitter, guide, rental operator, marina, or accommodation provider? TOP2 = % somewhat or very important.
“Local operators” in this question include accommodation providers and marinas as well as outfitters, guides and rental operators.

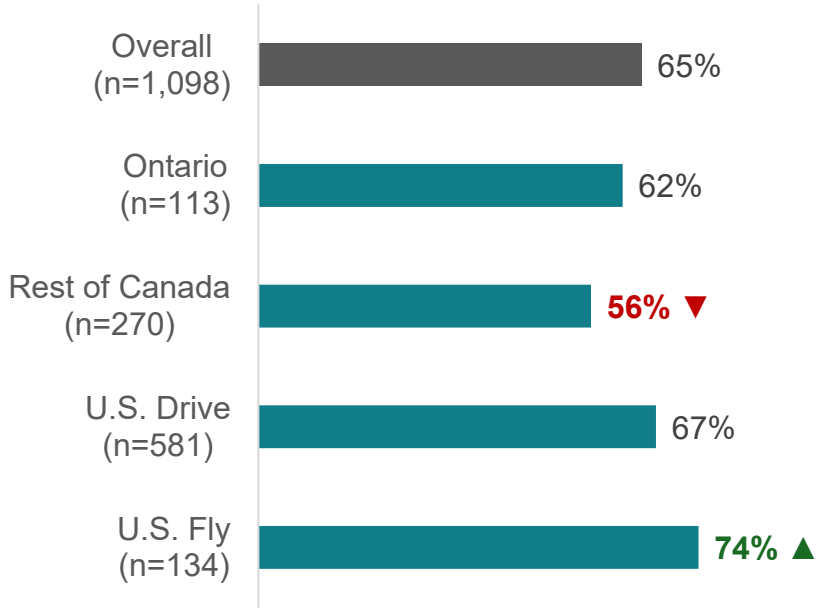
LIKELIHOOD OF USING AI TOOLS TO PLAN

All auto/RV tourers | Traveller types are defined on slide 10

Two-thirds of auto/RV tourers (65%) are likely to use AI tools to help plan their next auto/RV touring trip.

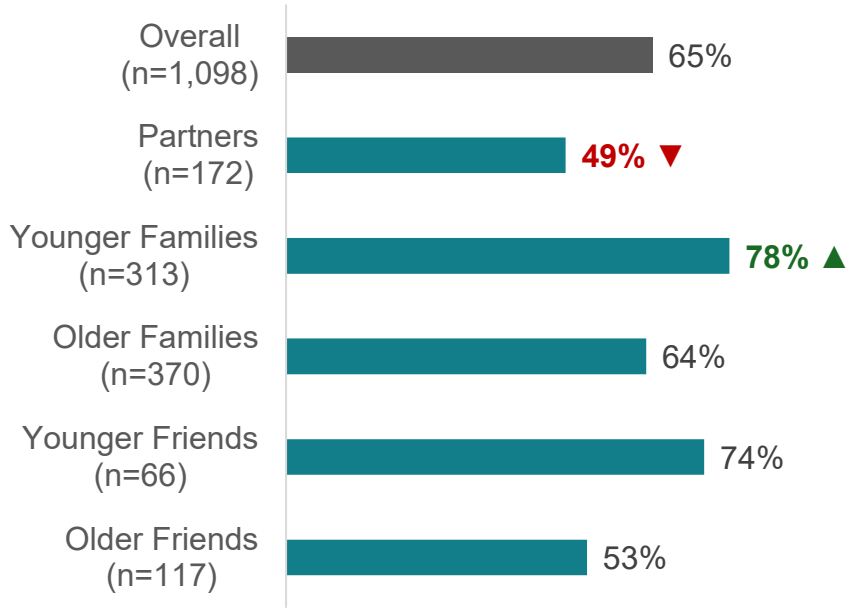
Likelihood is higher among U.S. Fly tourers (74%) and lower among Rest of Canada tourers (56%). Younger families (78%) are more likely than other traveller types to use AI tools, while partners (49%) are less likely.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,098). B5 (TOP2) How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next auto/RV touring trip? TOP2 = % somewhat or very likely.

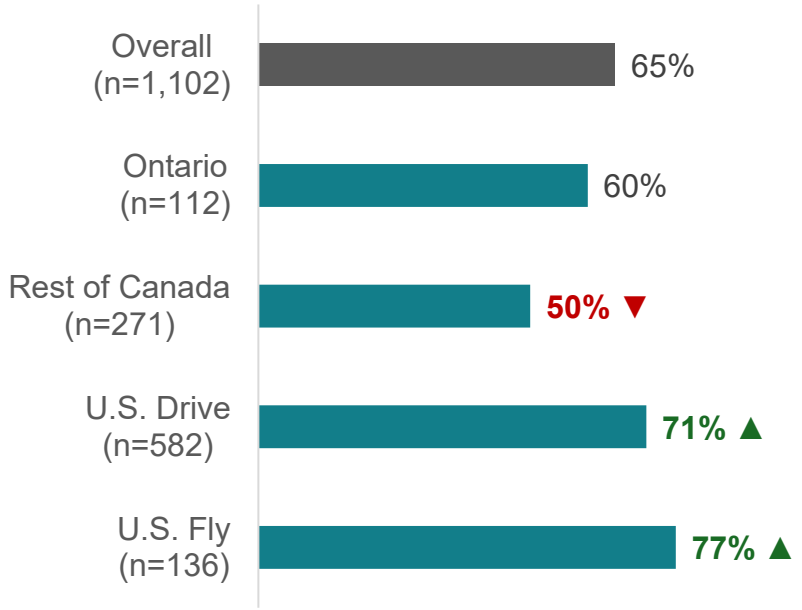
IMPORTANCE OF CERTIFICATION OR DESIGNATION

All auto/RV tourers | Traveller types are defined on slide 10

Two-thirds of auto/RV tourers (65%) say it is important that accommodations, operators or destinations hold a recognized certification or designation.

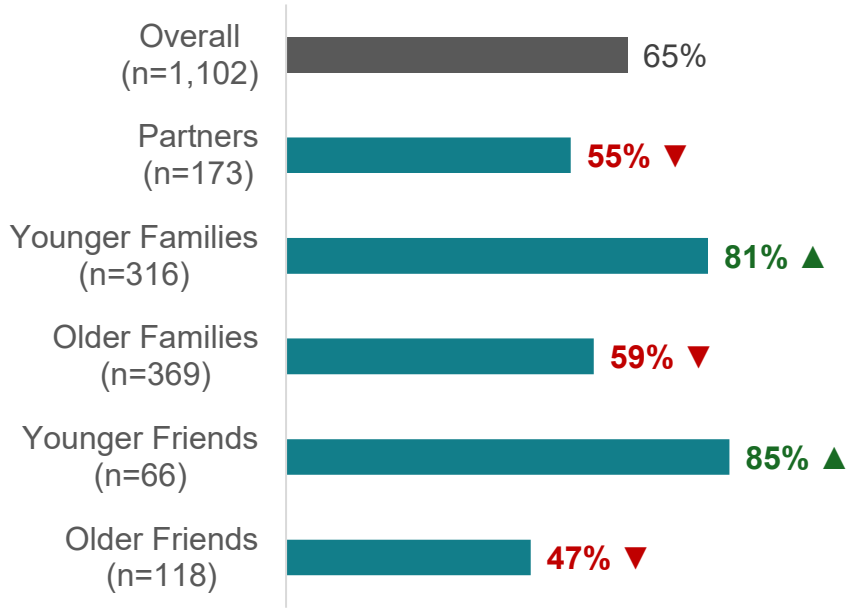
Importance is higher among U.S. Fly (77%) and U.S. Drive (71%) tourers and lower among Rest of Canada tourers (50%). Younger friend groups (85%) and younger families (81%) place more importance on certification than other traveller types, while older friend groups (47%), partners (55%) and older families (59%) place less.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers, excluding "Don't know" (n=1,102). B6 (TOP2) How important is it that accommodations, operators, or destinations hold a recognized certification or designation (e.g., motorcycle-friendly, snowmobile-friendly, ORV-friendly)? TOP2 = % somewhat or very important.

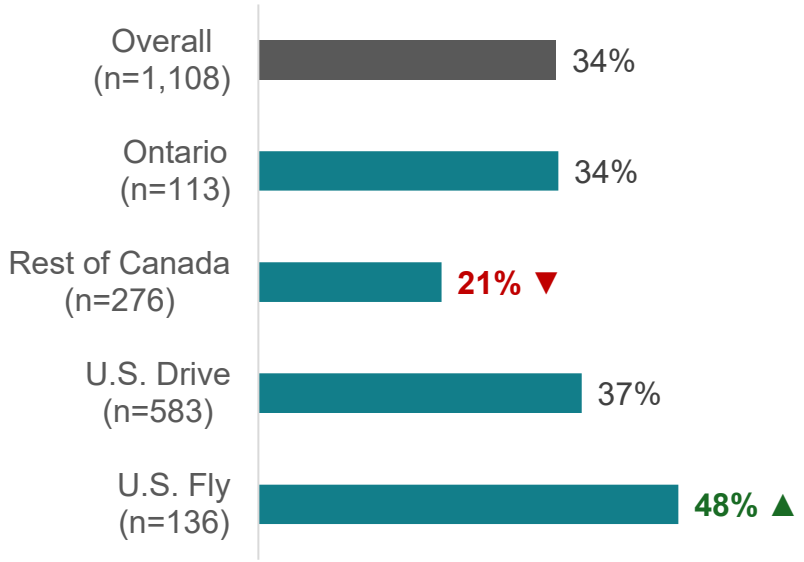
USE OF CERTIFIED ROUTES, TRAIL PASSES OR PASSPORT PROGRAMS

All auto/RV tourers | Traveller types are defined on slide 10

A third of auto/RV tourers (34%) have used an established or certified touring route, trail pass network or rewards/passport program when planning an auto/RV touring trip.

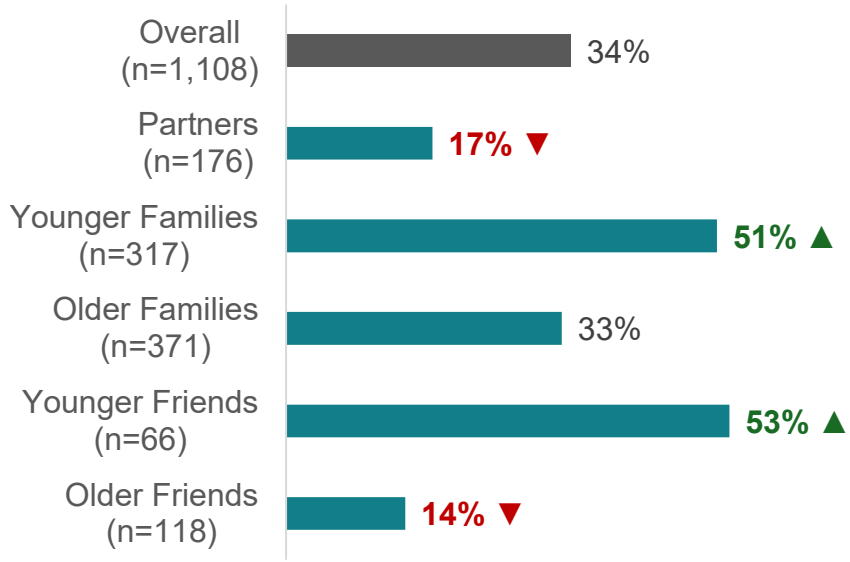
Use is higher among U.S. Fly tourers (48%) and lower among Rest of Canada tourers (21%). Younger friend groups (53%) and younger families (51%) are more likely than other traveller types to have used one, while partners (17%) and older friend groups (14%) are less likely.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers (n=1,108). B7 Have you used an established or certified touring route, trail pass network, or rewards/passport program (e.g., the OFSC trail system, a certified motorcycle touring route) when planning an auto/RV touring trip? % Yes shown; "No" (57%) and "Not sure" (9%) not shown.
The OFSC example in this question was shared across all five activities and is not specific to auto/RV touring.



MOTIVATION & VALUES

MOTIVATIONS FOR AUTO/RV TOURING – MARKET (1 OF 2)

All auto/RV tourers

Experiencing new places and landscapes (73%) and escape from everyday stress and routine (70%) are the top motivations for auto/RV touring trips, followed by connection with nature and the outdoors (65%), bonding with friends or family (60%) and exploring open roads, trails or waterways (59%).

Ontario tourers are the least likely to be motivated by connection with nature and the outdoors (56%) and by wildlife encounters and natural discovery (37%).

Motivation	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Experiencing new places and landscapes	73%	71%	75%	72%	75%
Escape from everyday stress and routine	70%	72%	72%	70%	65%
Connection with nature and the outdoors	65%	56%	63%	67%	67%
Bonding with friends or family	60%	64%	61%	58%	61%
Exploring open roads, trails, or waterways	59%	62%	56%	60%	57%
Wildlife encounters and natural discovery	49%	37%	47%	51%	51%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). M1 What are your primary motivations for taking auto/RV touring trips? Please select all that apply.

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

MOTIVATIONS FOR AUTO/RV TOURING – MARKET (2 OF 2)

All auto/RV tourers

Four in ten auto/RV tourers (40%) are motivated by thrill, challenge or a sense of adventure, and 38% by solitude and personal reflection.

U.S. Fly tourers are more likely than other markets to be motivated by thrill, challenge or adventure (55%) and by camaraderie with other auto/RV touring enthusiasts (31%).

Rest of Canada tourers are less likely to be motivated by thrill, challenge or adventure (25%).

Motivation	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Thrill, challenge, or sense of adventure	40%	40%	25% ▼	42%	55% ▲
Solitude and personal reflection	38%	35%	31%	40%	45%
Physical fitness and health	24%	19%	28%	23%	26%
Tradition or cultural heritage related to the activity	21%	17%	19%	20%	29%
Camaraderie or connection with other auto/RV touring enthusiasts	18%	9%	11%	19%	31% ▲
Other	1%	0%	2%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). M1 What are your primary motivations for taking auto/RV touring trips? Please select all that apply.

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

MOTIVATIONS FOR AUTO/RV TOURING – TRAVELLER TYPE (1 OF 2)

All auto/RV tourers | Traveller types are defined on slide 10

Partners are more likely than other traveller types to be motivated by escape from everyday stress and routine (83%), but less likely to be motivated by bonding with friends or family (47%).

Younger families (66%) and younger friend groups (58%) are less likely to be motivated by experiencing new places and landscapes, and younger friend groups are less likely to be motivated by escape (54%).

Older friend groups are the most likely to be motivated by new places and landscapes (84%) and by connection with nature and the outdoors (74%).

Motivation	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Experiencing new places and landscapes	73%	80%	66% ▼	76%	58% ▼	84%
Escape from everyday stress and routine	70%	83% ▲	65%	71%	54% ▼	73%
Connection with nature and the outdoors	65%	67%	64%	65%	53%	74%
Bonding with friends or family	60%	47% ▼	62%	67%	60%	62%
Exploring open roads, trails, or waterways	59%	62%	54%	59%	55%	65%
Wildlife encounters and natural discovery	49%	53%	50%	46%	50%	45%

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

Base: all auto/RV tourers (n=1,108). M1 What are your primary motivations for taking auto/RV touring trips? Please select all that apply.

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

MOTIVATIONS FOR AUTO/RV TOURING – TRAVELLER TYPE (2 OF 2)

All auto/RV tourers | Traveller types are defined on slide 10

Solitude and personal reflection ranges from 27% among younger friend groups to 47% among partners.

Camaraderie with other auto/RV touring enthusiasts ranges from 13% among partners to 21% among younger families and younger friend groups.

Motivation	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Thrill, challenge, or sense of adventure	40%	29%	45%	40%	41%	38%
Solitude and personal reflection	38%	47%	35%	31%	27%	44%
Physical fitness and health	24%	21%	23%	25%	30%	26%
Tradition or cultural heritage related to the activity	21%	17%	22%	21%	18%	20%
Camaraderie or connection with other auto/RV touring enthusiasts	18%	13%	21%	16%	21%	20%
Other	1%	0%	<1%	1%	1%	3%

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

Base: all auto/RV tourers (n=1,108). M1 What are your primary motivations for taking auto/RV touring trips? Please select all that apply.

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

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

All auto/RV tourers

Northern Lights or dark sky viewing (62%) and scenic driving or road trip components (60%) are the additional experiences most likely to enhance an auto/RV touring trip, followed by culinary experiences featuring local food (44%) and wildlife viewing (43%).

Scenic driving is highest among Ontario tourers (67%). Interest in all-inclusive lodge or touring packages ranges from 20% among Rest of Canada tourers to 39% among Ontario tourers.

Additional experience	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Northern Lights or dark sky viewing experiences	62%	62%	64%	62%	59%
Scenic driving or road trip components	60%	67%	58%	61%	55%
Culinary experiences featuring locally sourced or freshly caught / harvested food	44%	39%	49%	43%	47%
Wildlife viewing separate from auto/RV touring	43%	36%	35%	47%	51%
Multi-stop regional itineraries combining several Northern Ontario areas	33%	29%	35%	32%	35%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	32%	24%	38%	30%	36%
All-inclusive lodge or touring packages	30%	39%	20%	32%	37%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). M2 Beyond auto/RV touring itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

All auto/RV tourers

About a quarter of auto/RV tourers are interested in multi-activity packages (26%) or Indigenous-led cultural or land-based experiences (25%). Only 3% would prefer to focus entirely on auto/RV touring.

Rest of Canada tourers are less likely than other markets to be interested in photography or nature interpretation guided experiences (19%).

U.S. Fly tourers show the highest interest in multi-activity packages (36%), Indigenous-led experiences (30%) and learning and interpretation opportunities (30%).

Additional experience	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Photography or nature interpretation guided experiences	30%	25%	19% ▼	34%	36%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	26%	26%	23%	26%	36%
Indigenous-led cultural or land-based experiences	25%	17%	16%	29%	30%
Learning and interpretation opportunities	22%	18%	19%	23%	30%
Youth or family-oriented introduction-to-auto/RV touring programs	16%	17%	14%	16%	23%
Auto/RV touring rallies, races, or club events	13%	14%	9%	14%	18%
None – I prefer to focus entirely on auto/RV touring	3%	2%	4%	2%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). M2 Beyond auto/RV touring itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

All auto/RV tourers | Traveller types are defined on slide 10

Older friend groups show the highest interest in Northern Lights or dark sky viewing (80%), while younger families are less likely than other traveller types to be interested in scenic driving or road trip components (48%).

Partners are less likely to be interested in all-inclusive lodge or touring packages (18%).

Additional experience	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Northern Lights or dark sky viewing experiences	62%	64%	56%	62%	50%	80%
Scenic driving or road trip components	60%	66%	48% ▼	67%	46%	67%
Culinary experiences featuring locally sourced or freshly caught / harvested food	44%	52%	43%	42%	38%	49%
Wildlife viewing separate from auto/RV touring	43%	46%	45%	41%	44%	40%
Multi-stop regional itineraries combining several Northern Ontario areas	33%	30%	33%	34%	28%	39%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	32%	26%	37%	29%	41%	32%
All-inclusive lodge or touring packages	30%	18% ▼	34%	34%	41%	25%

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

Base: all auto/RV tourers (n=1,108). M2 Beyond auto/RV touring itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in youth or family-oriented introduction programs (28%) and in auto/RV touring rallies, races or club events (20%).

Partners are less likely to be interested in youth or family-oriented programs (3%).

Additional experience	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Photography or nature interpretation guided experiences	30%	24%	34%	28%	33%	30%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	26%	21%	33%	27%	27%	17%
Indigenous-led cultural or land-based experiences	25%	26%	26%	21%	25%	28%
Learning and interpretation opportunities	22%	17%	25%	22%	22%	26%
Youth or family-oriented introduction-to-auto/RV touring programs	16%	3% ▼	28% ▲	20%	13%	4%
Auto/RV touring rallies, races, or club events	13%	9%	20% ▲	12%	20%	7%
None – I prefer to focus entirely on auto/RV touring	3%	6%	3%	2%	3%	1%

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

Base: all auto/RV tourers (n=1,108). M2 Beyond auto/RV touring itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

WHAT MAKES A TRIP SUCCESSFUL – MARKET (1 OF 3)

Auto/RV tourers who provided a response

When asked what makes an auto/RV touring trip successful, auto/RV tourers most often mention fun and enjoyment (31%), scenery, nature and wildlife (28%) and time with family, friends or loved ones (25%).

Good roads, routes and the open road are mentioned most by Ontario (25%) and U.S. Fly (23%) tourers.

U.S. Fly tourers are also the most likely to mention scenery, nature and wildlife (35%) and safety (17%).

Theme	Overall (n=1,104)	Ontario (n=112)	Rest of Canada (n=276)	U.S. Drive (n=581)	U.S. Fly (n=136)
Fun / enjoyment / a good time	31%	27%	27%	35%	30%
Scenery / nature / wildlife	28%	27%	25%	28%	35%
Time with family, friends or loved ones	25%	29%	21%	27%	22%
New experiences / exploring / learning	18%	15%	20%	17%	21%
Relaxation / peace / stress-free	18%	15%	23%	17%	16%
Good roads / routes / open road	16%	25%	13%	13%	23%
Safety / no accidents / getting home safely	11%	10%	10%	10%	17%
No problems / things go smoothly	9%	11%	4%	11%	13%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who provided a response (n=1,104). M3 In your own words, what makes an auto/RV touring trip successful for you? Coded open-ended responses; more than one theme could be coded per response. "Don't know / not sure" (<1%) not shown.

WHAT MAKES A TRIP SUCCESSFUL – MARKET (2 OF 3)

Auto/RV tourers who provided a response

Fewer than one in ten mention each of good planning and reliable equipment (9%), bonding and making memories (8%), escape and unplugging (8%) or good accommodation, campsites and amenities (8%).

Good accommodation, campsites and amenities are mentioned most by Ontario tourers (13%).

Theme	Overall (n=1,104)	Ontario (n=112)	Rest of Canada (n=276)	U.S. Drive (n=581)	U.S. Fly (n=136)
Good planning / preparation / reliable equipment	9%	10%	4%	11%	9%
Bonding / making memories	8%	8%	7%	8%	11%
Escape / getting away / unplugging / freedom	8%	8%	5%	9%	8%
Good accommodation / campsites / amenities	8%	13%	6%	7%	9%
Local culture / meeting people	7%	4%	7%	9%	3%
Everyone in the group enjoys it	7%	7%	9%	7%	5%
Good food and drink	5%	8%	5%	5%	2%
Adventure / excitement / thrill	4%	7%	4%	3%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who provided a response (n=1,104). M3 In your own words, what makes an auto/RV touring trip successful for you? Coded open-ended responses; more than one theme could be coded per response. "Don't know / not sure" (<1%) not shown.

WHAT MAKES A TRIP SUCCESSFUL – MARKET (3 OF 3)

Auto/RV tourers who provided a response

Each remaining theme is mentioned by 5% of auto/RV tourers or fewer.

Theme	Overall (n=1,104)	Ontario (n=112)	Rest of Canada (n=276)	U.S. Drive (n=581)	U.S. Fly (n=136)
Coming home happy / satisfied / wanting to return	4%	6%	5%	4%	2%
Good weather	4%	4%	4%	4%	4%
Affordable / good value / on budget	3%	5%	3%	3%	3%
Good trails / snow conditions	2%	1%	1%	3%	1%
Calm water / good boating conditions	1%	1%	2%	1%	1%
Fishing / catching fish	1%	0%	1%	1%	1%
General positive / vague	5%	3%	6%	5%	5%
Other	5%	0%	5%	7%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who provided a response (n=1,104). M3 In your own words, what makes an auto/RV touring trip successful for you? Coded open-ended responses; more than one theme could be coded per response. "Don't know / not sure" (<1%) not shown.

WHAT MAKES A TRIP SUCCESSFUL – TRAVELLER TYPE (1 OF 3)

Auto/RV tourers who provided a response | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to say a successful trip is one with no problems, where things go smoothly (16%).

Older friend groups are the most likely to mention scenery, nature and wildlife (37%) and relaxation (32%), while partners are the least likely to mention time with family, friends or loved ones (12%).

Theme	Overall (n=1,104)	Partners (n=176)	Younger Families (n=316)	Older Families (n=368)	Younger Friends (n=66)	Older Friends (n=118)
Fun / enjoyment / a good time	31%	26%	31%	34%	36%	36%
Scenery / nature / wildlife	28%	28%	28%	25%	21%	37%
Time with family, friends or loved ones	25%	12%	27%	32%	19%	22%
New experiences / exploring / learning	18%	22%	14%	19%	13%	24%
Relaxation / peace / stress-free	18%	20%	14%	15%	13%	32%
Good roads / routes / open road	16%	14%	17%	19%	13%	9%
Safety / no accidents / getting home safely	11%	18%	11%	11%	10%	6%
No problems / things go smoothly	9%	5%	16% ▲	8%	7%	6%

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

Base: auto/RV tourers who provided a response (n=1,104). M3 In your own words, what makes an auto/RV touring trip successful for you? Coded open-ended responses; more than one theme could be coded per response. "Don't know / not sure" (<1%) not shown.

WHAT MAKES A TRIP SUCCESSFUL – TRAVELLER TYPE (2 OF 3)

Auto/RV tourers who provided a response | Traveller types are defined on slide 10

Younger families are also more likely than other traveller types to mention good planning, preparation and reliable equipment (14%).

Older friend groups are the most likely to mention local culture and meeting people (18%).

Theme	Overall (n=1,104)	Partners (n=176)	Younger Families (n=316)	Older Families (n=368)	Younger Friends (n=66)	Older Friends (n=118)
Good planning / preparation / reliable equipment	9%	4%	14% ▲	8%	11%	4%
Bonding / making memories	8%	8%	10%	9%	5%	5%
Escape / getting away / unplugging / freedom	8%	12%	5%	8%	11%	10%
Good accommodation / campsites / amenities	8%	5%	10%	9%	9%	5%
Local culture / meeting people	7%	13%	6%	3%	1%	18%
Everyone in the group enjoys it	7%	3%	9%	10%	8%	1%
Good food and drink	5%	6%	3%	4%	8%	8%
Adventure / excitement / thrill	4%	2%	4%	5%	3%	4%

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

Base: auto/RV tourers who provided a response (n=1,104). M3 In your own words, what makes an auto/RV touring trip successful for you? Coded open-ended responses; more than one theme could be coded per response. "Don't know / not sure" (<1%) not shown.

WHAT MAKES A TRIP SUCCESSFUL – TRAVELLER TYPE (3 OF 3)

Auto/RV tourers who provided a response | Traveller types are defined on slide 10

Each remaining theme is mentioned by 7% or fewer in every traveller type.

Theme	Overall (n=1,104)	Partners (n=176)	Younger Families (n=316)	Older Families (n=368)	Younger Friends (n=66)	Older Friends (n=118)
Coming home happy / satisfied / wanting to return	4%	3%	5%	5%	2%	2%
Good weather	4%	6%	5%	3%	3%	3%
Affordable / good value / on budget	3%	4%	4%	3%	5%	2%
Good trails / snow conditions	2%	2%	5%	2%	0%	0%
Calm water / good boating conditions	1%	0%	2%	1%	4%	3%
Fishing / catching fish	1%	1%	1%	1%	0%	0%
General positive / vague	5%	4%	6%	5%	4%	6%
Other	5%	6%	7%	4%	6%	1%

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

Base: auto/RV tourers who provided a response (n=1,104). M3 In your own words, what makes an auto/RV touring trip successful for you? Coded open-ended responses; more than one theme could be coded per response. "Don't know / not sure" (<1%) not shown.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – MARKET (1 OF 3)

Auto/RV tourers who provided a response

Auto/RV tourers see Northern Ontario's scenery and natural beauty (35%) and its wilderness and untouched nature (31%) as its greatest advantages for auto/RV touring.

Ontario tourers are the most likely to mention both scenery (45%) and wilderness (42%).

Fewer mention it being uncrowded or remote (14%), vast open space (11%) or the variety of things to do (11%).

Advantage	Overall (n=1,096)	Ontario (n=108)	Rest of Canada (n=276)	U.S. Drive (n=576)	U.S. Fly (n=136)
Scenery / natural beauty / landscapes	35%	45%	24%	37%	42%
Wilderness / untouched / pristine nature	31%	42%	25%	32%	29%
Uncrowded / quiet / remote / solitude	14%	15%	9%	16%	16%
Vast / open space / room to explore	11%	11%	9%	12%	16%
Variety of things to do / places to explore	11%	17%	7%	11%	16%
Unique / different / new to me / in Canada	10%	5%	14%	8%	8%
Lakes / rivers / water	9%	12%	9%	8%	12%
Good roads / scenic routes and drives	9%	8%	5%	9%	15%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who provided a response (n=1,096). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for auto/RV touring trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (8%) not shown.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – MARKET (2 OF 3)

Auto/RV tourers who provided a response

Fewer than one in ten mention Northern Lights and dark skies (7%), wildlife (5%), being close to home (4%) or forests and fall colours (4%).

U.S. Fly tourers are the most likely to mention escape from the city or everyday life (7%).

Advantage	Overall (n=1,096)	Ontario (n=108)	Rest of Canada (n=276)	U.S. Drive (n=576)	U.S. Fly (n=136)
Northern lights / dark skies / stars	7%	3%	6%	8%	8%
Wildlife	5%	2%	2%	7%	7%
Close to home / easy to get to	4%	6%	6%	3%	5%
Forests / trees / fall colours	4%	6%	3%	3%	3%
Escape from the city / everyday life	3%	2%	2%	3%	7%
Culture / history / Indigenous heritage	3%	2%	2%	4%	4%
Affordable / good value	2%	5%	1%	1%	3%
Climate / cooler weather / seasons	2%	4%	1%	1%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who provided a response (n=1,096). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for auto/RV touring trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (8%) not shown.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – MARKET (3 OF 3)

Auto/RV tourers who provided a response

Each remaining advantage is mentioned by 2% of auto/RV tourers or fewer, and 7% give a general positive response.

Advantage	Overall (n=1,096)	Ontario (n=108)	Rest of Canada (n=276)	U.S. Drive (n=576)	U.S. Fly (n=136)
Friendly / welcoming people / hospitality	2%	1%	<1%	2%	4%
Fishing	2%	0%	1%	2%	2%
Trails / snow / terrain for riding	1%	3%	1%	1%	1%
Clean environment / fresh air	1%	3%	0%	2%	0%
Safe destination	1%	1%	1%	<1%	<1%
General positive / vague	7%	3%	5%	9%	7%
Other	6%	3%	9%	5%	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who provided a response (n=1,096). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for auto/RV touring trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (8%) not shown.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – TRAVELLER TYPE (1 OF 3)

Auto/RV tourers who provided a response | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to mention Northern Ontario being uncrowded, quiet or remote (21%) and its good roads and scenic routes (15%).

Scenery and natural beauty is mentioned most often by most traveller types, while partners mention wilderness (35%) more often than scenery (28%).

Advantage	Overall (n=1,096)	Partners (n=174)	Younger Families (n=314)	Older Families (n=366)	Younger Friends (n=65)	Older Friends (n=118)
Scenery / natural beauty / landscapes	35%	28%	39%	36%	33%	40%
Wilderness / untouched / pristine nature	31%	35%	34%	30%	33%	23%
Uncrowded / quiet / remote / solitude	14%	11%	21% ▲	13%	11%	8%
Vast / open space / room to explore	11%	12%	16%	9%	8%	5%
Variety of things to do / places to explore	11%	8%	12%	11%	14%	9%
Unique / different / new to me / in Canada	10%	9%	10%	10%	6%	13%
Lakes / rivers / water	9%	7%	10%	10%	10%	3%
Good roads / scenic routes and drives	9%	6%	15% ▲	8%	12%	0%

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

Base: auto/RV tourers who provided a response (n=1,096). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for auto/RV touring trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (8%) not shown.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – TRAVELLER TYPE (2 OF 3)

Auto/RV tourers who provided a response | Traveller types are defined on slide 10

Fewer than one in ten in any traveller type mention each of the advantages on this slide.

Advantage	Overall (n=1,096)	Partners (n=174)	Younger Families (n=314)	Older Families (n=366)	Younger Friends (n=65)	Older Friends (n=118)
Northern lights / dark skies / stars	7%	7%	8%	8%	2%	8%
Wildlife	5%	7%	4%	5%	3%	3%
Close to home / easy to get to	4%	3%	4%	4%	8%	3%
Forests / trees / fall colours	4%	6%	4%	2%	8%	0%
Escape from the city / everyday life	3%	4%	4%	3%	1%	1%
Culture / history / Indigenous heritage	3%	2%	3%	3%	4%	3%
Affordable / good value	2%	3%	1%	3%	1%	0%
Climate / cooler weather / seasons	2%	0%	2%	2%	2%	4%

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

Base: auto/RV tourers who provided a response (n=1,096). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for auto/RV touring trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (8%) not shown.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – TRAVELLER TYPE (3 OF 3)

Auto/RV tourers who provided a response | Traveller types are defined on slide 10

Younger friend groups are the most likely to give a general positive response (16%).

Advantage	Overall (n=1,096)	Partners (n=174)	Younger Families (n=314)	Older Families (n=366)	Younger Friends (n=65)	Older Friends (n=118)
Friendly / welcoming people / hospitality	2%	2%	2%	1%	3%	0%
Fishing	2%	<1%	1%	2%	1%	0%
Trails / snow / terrain for riding	1%	3%	1%	2%	2%	0%
Clean environment / fresh air	1%	1%	1%	1%	2%	0%
Safe destination	1%	1%	1%	1%	0%	0%
General positive / vague	7%	4%	9%	7%	16%	5%
Other	6%	7%	7%	5%	4%	10%

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

Base: auto/RV tourers who provided a response (n=1,096). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for auto/RV touring trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (8%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (1 OF 3)

Auto/RV tourers who provided a response

Auto/RV tourers most often describe sustainable tourism as protecting or preserving the environment and nature (38%), followed by minimal impact (18%) and tourism that lasts and keeps visitors coming back (15%).

U.S. Fly tourers are the most likely to mention protecting the environment (47%), minimal impact (22%) and future generations (16%).

Meaning	Overall (n=1,095)	Ontario (n=108)	Rest of Canada (n=275)	U.S. Drive (n=577)	U.S. Fly (n=136)
Protecting / preserving the environment and nature	38%	37%	37%	36%	47%
Minimal impact / not harming or damaging	18%	18%	20%	16%	22%
Tourism that lasts / keeps visitors coming back	15%	17%	20%	13%	11%
Benefiting / respecting local communities	12%	10%	9%	12%	16%
Good visitor experience (easy, enjoyable, lots to offer)	11%	10%	11%	12%	11%
Leave no trace / leave it as you found it / no litter	11%	8%	10%	12%	10%
For future generations / so others can enjoy it later	10%	10%	8%	9%	16%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who provided a response (n=1,095). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (7%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (2 OF 3)

Auto/RV tourers who provided a response

Fewer than one in ten mention respectful or responsible travel (9%), eco-friendly practices (8%) or supporting the local economy and businesses (7%).

U.S. Fly tourers are the most likely to mention supporting the local economy and businesses (12%).

Meaning	Overall (n=1,095)	Ontario (n=108)	Rest of Canada (n=275)	U.S. Drive (n=577)	U.S. Fly (n=136)
Respectful / responsible / mindful travel	9%	8%	11%	8%	12%
Eco-friendly / green / recycling / less waste	8%	6%	6%	10%	8%
Supporting the local economy / businesses	7%	9%	3%	7%	12%
Responsible use of natural resources	5%	2%	3%	7%	5%
Respecting local culture / heritage	5%	4%	1%	6%	7%
Lower emissions / fuel / energy use	4%	8%	3%	4%	4%
Travelling / exploring / touring (term read literally)	3%	3%	1%	4%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who provided a response (n=1,095). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (7%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (3 OF 3)

Auto/RV tourers who provided a response

Each remaining theme is mentioned by 3% of auto/RV tourers or fewer, and 6% give a general positive response.

Meaning	Overall (n=1,095)	Ontario (n=108)	Rest of Canada (n=275)	U.S. Drive (n=577)	U.S. Fly (n=136)
Affordable / budget travel	3%	3%	2%	4%	1%
Protecting wildlife and habitats	3%	3%	6%	1%	1%
Balancing visitors, environment and community	2%	3%	2%	2%	2%
General positive / vague	6%	11%	3%	5%	10%
Other	6%	8%	8%	5%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who provided a response (n=1,095). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (7%) not shown.

MEANING OF SUSTAINABLE TOURISM – TRAVELLER TYPE (1 OF 3)

Auto/RV tourers who provided a response | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to describe sustainable tourism as benefiting or respecting local communities (19%).

Older friend groups are the most likely to mention tourism that lasts (23%), and older friend groups (42%) and younger families (41%) the most likely to mention protecting the environment.

Meaning	Overall (n=1,095)	Partners (n=176)	Younger Families (n=316)	Older Families (n=362)	Younger Friends (n=65)	Older Friends (n=116)
Protecting / preserving the environment and nature	38%	29%	41%	37%	32%	42%
Minimal impact / not harming or damaging	18%	14%	18%	20%	13%	13%
Tourism that lasts / keeps visitors coming back	15%	13%	12%	16%	14%	23%
Benefiting / respecting local communities	12%	5%	19% ▲	11%	11%	8%
Good visitor experience (easy, enjoyable, lots to offer)	11%	14%	12%	8%	8%	16%
Leave no trace / leave it as you found it / no litter	11%	14%	7%	11%	4%	11%
For future generations / so others can enjoy it later	10%	6%	14%	9%	7%	9%

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

Base: auto/RV tourers who provided a response (n=1,095). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (7%) not shown.

MEANING OF SUSTAINABLE TOURISM – TRAVELLER TYPE (2 OF 3)

Auto/RV tourers who provided a response | Traveller types are defined on slide 10

Younger families are also more likely than other traveller types to mention respectful or responsible travel (15%) and respecting local culture or heritage (9%).

Meaning	Overall (n=1,095)	Partners (n=176)	Younger Families (n=316)	Older Families (n=362)	Younger Friends (n=65)	Older Friends (n=116)
Respectful / responsible / mindful travel	9%	10%	15% ▲	6%	7%	8%
Eco-friendly / green / recycling / less waste	8%	9%	6%	8%	11%	7%
Supporting the local economy / businesses	7%	6%	11%	6%	7%	1%
Responsible use of natural resources	5%	4%	4%	7%	4%	6%
Respecting local culture / heritage	5%	1%	9% ▲	3%	5%	3%
Lower emissions / fuel / energy use	4%	2%	5%	4%	2%	7%
Travelling / exploring / touring (term read literally)	3%	6%	4%	3%	2%	1%

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

Base: auto/RV tourers who provided a response (n=1,095). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (7%) not shown.

MEANING OF SUSTAINABLE TOURISM – TRAVELLER TYPE (3 OF 3)

Auto/RV tourers who provided a response | Traveller types are defined on slide 10

Younger friend groups are the most likely to give a general positive response (12%).

Meaning	Overall (n=1,095)	Partners (n=176)	Younger Families (n=316)	Older Families (n=362)	Younger Friends (n=65)	Older Friends (n=116)
Affordable / budget travel	3%	3%	5%	2%	3%	2%
Protecting wildlife and habitats	3%	2%	3%	2%	3%	5%
Balancing visitors, environment and community	2%	2%	1%	2%	5%	2%
General positive / vague	6%	7%	7%	4%	12%	2%
Other	6%	3%	6%	9%	6%	6%

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

Base: auto/RV tourers who provided a response (n=1,095). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (7%) not shown.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – MARKET

All auto/RV tourers

More than eight in ten auto/RV tourers say supporting local, independently owned businesses (86%), conservation and responsible resource management (86%), minimal environmental impact (84%) and community benefit (82%) are important when choosing a destination.

Rest of Canada tourers place less importance than other markets on learning about Indigenous culture and history (46%) and on accessibility (52%).

U.S. Drive tourers place more importance on learning about Indigenous culture and history (79%), and U.S. Fly tourers on accessibility (79%).

Consideration	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Supporting local, independently owned businesses	86%	83%	80%	90%	90%
Conservation and responsible resource management	86%	82%	84%	86%	93%
Minimal environmental impact of tourism in the area	84%	83%	80%	84%	90%
Community benefit – tourism dollars staying in the local community	82%	83%	79%	84%	81%
Learning about Indigenous culture and history	69%	63%	46% ▼	79% ▲	79%
Accessibility for people with mobility or physical needs	67%	66%	52% ▼	71%	79% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,101 to 1,108). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? TOP2 = % somewhat or very important.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Younger families place more importance than other traveller types on five of the six considerations, including supporting local businesses (92%), conservation (91%) and learning about Indigenous culture and history (78%).

Partners rate each consideration below the overall level.

Consideration	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Supporting local, independently owned businesses	86%	82%	92% ▲	84%	84%	89%
Conservation and responsible resource management	86%	79%	91% ▲	86%	89%	81%
Minimal environmental impact of tourism in the area	84%	81%	89% ▲	81%	82%	79%
Community benefit – tourism dollars staying in the local community	82%	76%	86%	81%	79%	81%
Learning about Indigenous culture and history	69%	62%	78% ▲	64%	67%	75%
Accessibility for people with mobility or physical needs	67%	60%	78% ▲	62%	76%	53%

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

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,101 to 1,108). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? TOP2 = % somewhat or very important.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (1 OF 2)

All auto/RV tourers

Nine in ten auto/RV tourers (92%) feel a personal responsibility to protect the natural environments they visit, and about three-quarters are interested in contributing to wildlife conservation (78%) or say visible sustainable practices are enough when a certified operator is not available (77%).

U.S. Fly tourers are more likely than other markets to agree with each of these statements except personal responsibility. U.S. Fly (78%) and U.S. Drive (75%) tourers are more interested in an Indigenous-led guided experience, while Rest of Canada tourers are less interested (47%).

Ontario tourers are less likely to say visible sustainable practices are enough (65%).

Statement	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
I feel a personal responsibility to protect natural environments I visit	92%	94%	90%	93%	94%
I am interested in contributing to wildlife conservation when I travel	78%	70%	76%	78%	87% ▲
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	77%	65% ▼	74%	78%	85% ▲
I would be interested in an Indigenous-led guided experience	68%	65%	47% ▼	75% ▲	78% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,095 to 1,108). V2 (TOP2) To what extent do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (2 OF 2)

All auto/RV tourers

About six in ten auto/RV tourers actively seek out eco-friendly or sustainable travel options (62%) or would pay more for a trip with a clear conservation benefit (61%), and 57% actively look for operators with a recognized environmental or sustainability certification.

U.S. Fly tourers are more likely than other markets to agree with each of these statements (73% to 79%), while Rest of Canada tourers are less likely (43% to 50%).

Statement	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
I actively seek out eco-friendly or sustainable travel options	62%	58%	50% ▼	66%	78% ▲
I would pay more for a trip that had a clear conservation benefit	61%	54%	46% ▼	65%	79% ▲
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	57%	49%	43% ▼	61%	73% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,095 to 1,108). V2 (TOP2) To what extent do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

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

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in contributing to wildlife conservation (90%), to say visible sustainable practices are enough (85%) and to be interested in an Indigenous-led guided experience (79%).

Partners are less likely to be interested in contributing to wildlife conservation (68%).

Statement	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
I feel a personal responsibility to protect natural environments I visit	92%	92%	94%	92%	92%	91%
I am interested in contributing to wildlife conservation when I travel	78%	68% ▼	90% ▲	73%	85%	68%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	77%	67%	85% ▲	77%	73%	68%
I would be interested in an Indigenous-led guided experience	68%	58%	79% ▲	65%	79%	56%

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

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,095 to 1,108). V2 (TOP2) To what extent do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

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

All auto/RV tourers | Traveller types are defined on slide 10

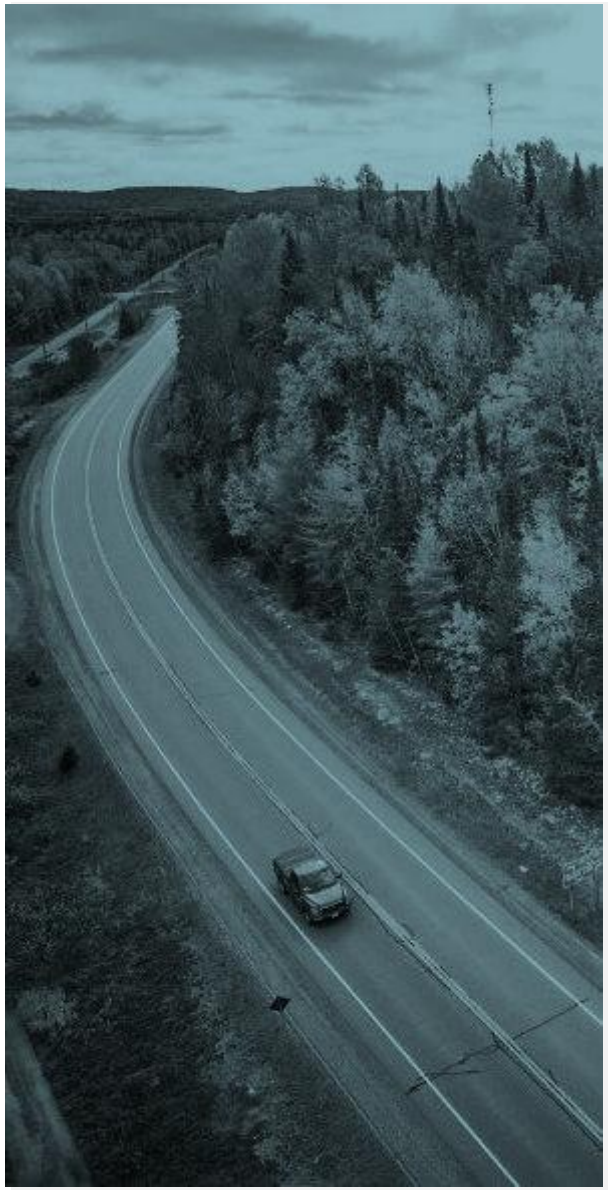
Younger families are also more likely than other traveller types to agree with each of these statements (75% to 79%), while partners are less likely (38% to 47%).

Older friend groups are less likely to say they would pay more for a trip with a clear conservation benefit (42%).

Statement	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
I actively seek out eco-friendly or sustainable travel options	62%	44% ▼	79% ▲	59%	69%	50%
I would pay more for a trip that had a clear conservation benefit	61%	47% ▼	79% ▲	55%	72%	42% ▼
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	57%	38% ▼	75% ▲	51%	67%	49%

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

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,095 to 1,108). V2 (TOP2) To what extent do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.



AWARENESS & PERCEPTION

AWARENESS OF NORTHERN ONTARIO – MARKET

Auto/RV tourers who do not live in Northern Ontario

Three-quarters of auto/RV tourers know a lot (30%) or a little (45%) about Northern Ontario. About a quarter (23%) have heard of it but know nothing about it, and 2% have never heard of it.

Ontario (44%) and U.S. Fly (39%) tourers are more likely than other markets to know a lot about Northern Ontario, while Rest of Canada tourers are less likely (22%).

Three in ten Rest of Canada tourers (30%) have heard of Northern Ontario but know nothing about it, compared with 10% of Ontario tourers.

Awareness	Overall (n=1,106)	Ontario (n=111)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
I have heard of and know a lot about it	30%	44% ▲	22% ▼	29%	39% ▲
I have heard of and know a little bit about it	45%	46%	46%	46%	42%
I have heard of but know nothing about it	23%	10% ▼	30% ▲	23%	17%
I have never heard of before	2%	0%	3%	3%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who do not live in Northern Ontario (n=1,106). N0 How would you best describe your awareness of Northern Ontario?

AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

Auto/RV tourers who do not live in Northern Ontario | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to know a lot about Northern Ontario (47%), while partners are less likely (16%).

Younger families are also less likely to have heard of it but know nothing about it (12%). Older friend groups are the most likely to know nothing about it beyond the name (32%).

Awareness	Overall (n=1,106)	Partners (n=176)	Younger Families (n=316)	Older Families (n=369)	Younger Friends (n=66)	Older Friends (n=118)
I have heard of and know a lot about it	30%	16% ▼	47% ▲	25%	38%	19%
I have heard of and know a little bit about it	45%	55%	39% ▼	45%	47%	48%
I have heard of but know nothing about it	23%	27%	12% ▼	27%	13%	32%
I have never heard of before	2%	1%	2%	3%	2%	1%

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

Base: auto/RV tourers who do not live in Northern Ontario (n=1,106). N0 How would you best describe your awareness of Northern Ontario?

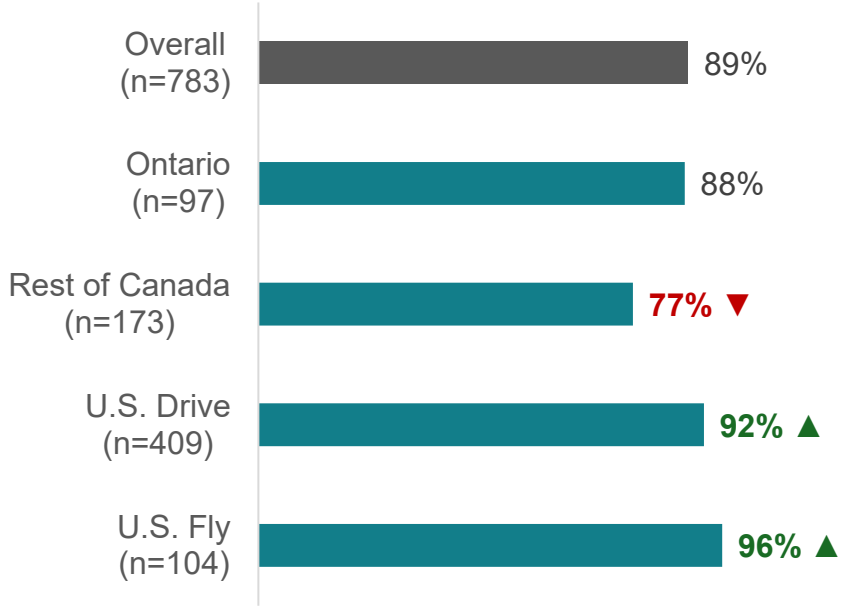
RATING OF NORTHERN ONTARIO FOR AUTO/RV TOURING

Auto/RV tourers who know a lot or a little about Northern Ontario | Traveller types are defined on slide 10

Nearly nine in ten auto/RV tourers who know Northern Ontario (89%) rate it 4 or 5 out of 5 as a pleasure travel destination for auto/RV touring, including 47% who rate it excellent.

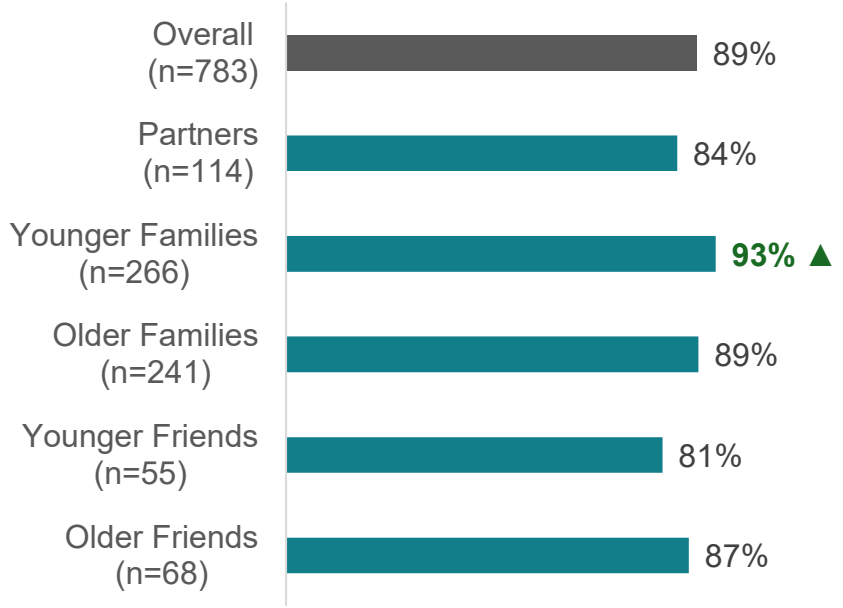
Ratings are higher among U.S. Fly (96%) and U.S. Drive (92%) tourers and lower among Rest of Canada tourers (77%). Younger families rate Northern Ontario higher than other traveller types (93%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: auto/RV tourers who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=783). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for auto/RV touring? TOP2 = % rating 4 or 5 (1 = Poor, 5 = Excellent).

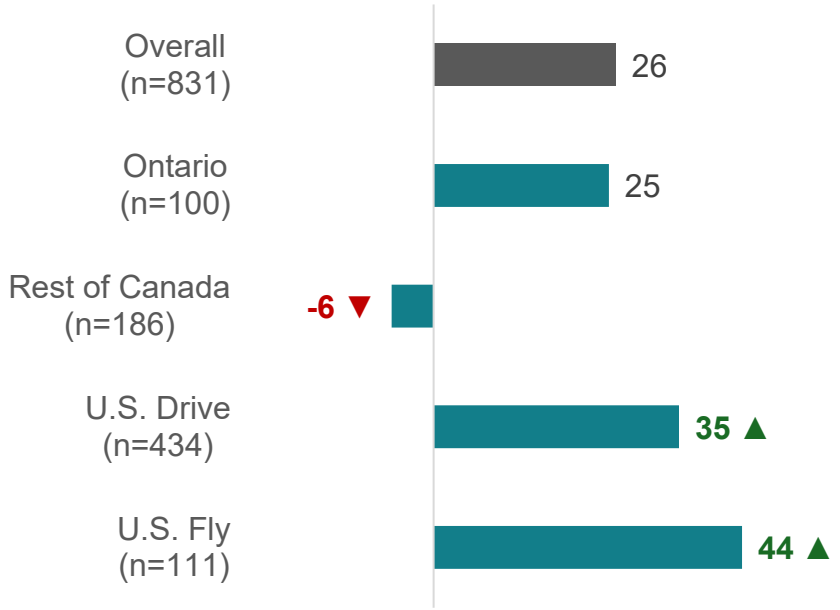
LIKELIHOOD TO RECOMMEND NORTHERN ONTARIO (NPS)

Auto/RV tourers who know a lot or a little about Northern Ontario | Traveller types are defined on slide 10

Northern Ontario has a Net Promoter Score (NPS) of 26 among auto/RV tourers who know it, with 44% promoters and 18% detractors.

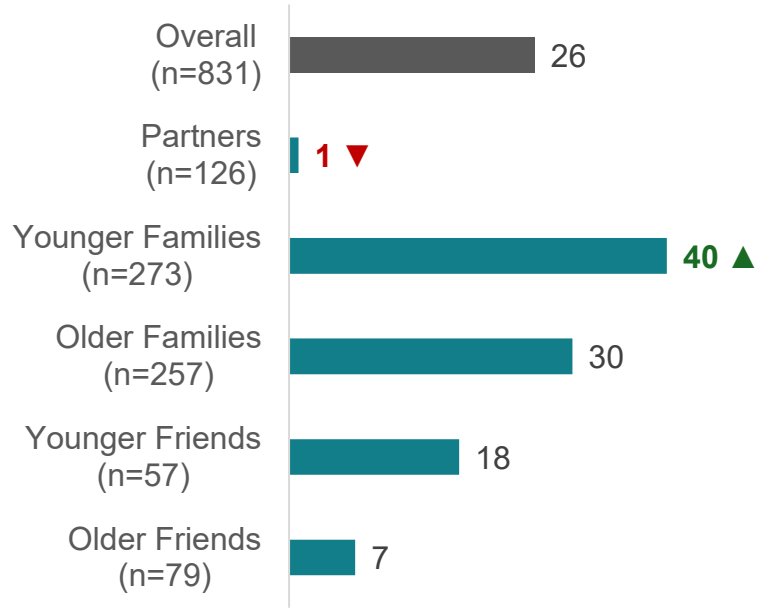
NPS is higher among U.S. Fly (44) and U.S. Drive (35) tourers and negative among Rest of Canada tourers (-6), where detractors (31%) outnumber promoters (25%). Younger families have a higher NPS than other traveller types (40), while partners have a lower NPS (1).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: auto/RV tourers who know a lot or a little about Northern Ontario (n=831). N2 (NPS) How likely would you be to recommend Northern Ontario to a friend or colleague as a destination for auto/RV touring? (0 = Not at all likely, 10 = Extremely likely) NPS = % promoters (9–10) minus % detractors (0–6).

PERCEPTIONS OF NORTHERN ONTARIO – MARKET

Auto/RV tourers who know a lot or a little about Northern Ontario

Close to nine in ten agree that Northern Ontario offers excellent auto/RV touring experiences (89%), feels welcoming (88%), is a destination they would seriously consider (88%) and offers a wide variety of routes, trails or waterways (88%).

Fewer agree they know enough about Northern Ontario to plan a trip (74%) or that it is better than alternatives closer to home (69%).

Rest of Canada tourers agree less than other markets with every statement (49% to 81%). U.S. Fly (79%) and U.S. Drive (75%) tourers are more likely to say Northern Ontario is better than alternatives closer to home.

Statement	Overall (n=826)	Ontario (n=99)	Rest of Canada (n=186)	U.S. Drive (n=433)	U.S. Fly (n=110)
Northern Ontario offers excellent auto/RV touring experiences	89%	92%	80% ▼	92%	90%
Northern Ontario feels welcoming to travellers like me	88%	92%	81% ▼	91%	89%
Northern Ontario is a destination I would seriously consider for auto/RV touring	88%	91%	81% ▼	91%	88%
Northern Ontario offers a wide variety of routes, trails, or waterways for auto/RV touring	88%	91%	77% ▼	91%	91%
I know enough about Northern Ontario to plan an auto/RV touring trip there	74%	84%	61% ▼	77%	77%
For auto/RV touring, Northern Ontario is better than alternatives I could choose closer to home	69%	69%	49% ▼	75% ▲	79% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=784 to 826). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

PERCEPTIONS OF NORTHERN ONTARIO – TRAVELLER TYPE

Auto/RV tourers who know a lot or a little about Northern Ontario | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to agree they know enough about Northern Ontario to plan a trip (82%) and that it is better than alternatives closer to home (81%).

Partners agree less with four of the six statements, including that Northern Ontario offers excellent auto/RV touring experiences (80%) and a wide variety of routes, trails or waterways (74%).

Statement	Overall (n=826)	Partners (n=124)	Younger Families (n=273)	Older Families (n=256)	Younger Friends (n=57)	Older Friends (n=79)
Northern Ontario offers excellent auto/RV touring experiences	89%	80% ▼	91%	90%	91%	90%
Northern Ontario feels welcoming to travellers like me	88%	86%	90%	91%	93%	83%
Northern Ontario is a destination I would seriously consider for auto/RV touring	88%	81%	92%	89%	94%	82%
Northern Ontario offers a wide variety of routes, trails, or waterways for auto/RV touring	88%	74% ▼	90%	92%	93%	90%
I know enough about Northern Ontario to plan an auto/RV touring trip there	74%	58% ▼	82% ▲	80%	77%	62%
For auto/RV touring, Northern Ontario is better than alternatives I could choose closer to home	69%	56% ▼	81% ▲	67%	73%	58%

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

Base: auto/RV tourers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=784 to 826). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – MARKET

Auto/RV tourers who know a lot or a little about Northern Ontario

More than eight in ten agree Northern Ontario has each of the attributes tested, led by pristine lakes and waterways (94%), remote, untouched wilderness (92%) and authentic campfire and wilderness experiences (91%).

Good value for money is the lowest-rated attribute (82%). Rest of Canada tourers are less likely than other markets to agree Northern Ontario offers good value (63%), while U.S. Drive tourers are more likely (88%).

Northern Ontario has…	Overall (n=814)	Ontario (n=99)	Rest of Canada (n=180)	U.S. Drive (n=427)	U.S. Fly (n=109)
Pristine lakes and waterways	94%	94%	92%	95%	96%
Remote, untouched wilderness	92%	88%	92%	93%	91%
Authentic campfire and wilderness experiences	91%	95%	85%	92%	92%
Excellent auto/RV touring routes and scenic byways	90%	95%	86%	90%	91%
Friendly and welcoming local communities	89%	92%	82%	90%	94%
Dark skies ideal for stargazing	89%	88%	82%	92%	88%
Rich Indigenous culture and heritage	87%	87%	81%	89%	92%
Opportunities to see the Northern Lights (Aurora Borealis)	87%	87%	78%	90%	91%
Good value for money	82%	83%	63% ▼	88% ▲	89%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=780 to 814). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – TRAVELLER TYPE

Auto/RV tourers who know a lot or a little about Northern Ontario | Traveller types are defined on slide 10

Partners agree less than other traveller types that Northern Ontario has friendly and welcoming local communities (78%), opportunities to see the Northern Lights (75%) and good value for money (68%).

Older friend groups also rate good value for money lower than other attributes (68%).

Northern Ontario has…	Overall (n=814)	Partners (n=123)	Younger Families (n=271)	Older Families (n=250)	Younger Friends (n=56)	Older Friends (n=79)
Pristine lakes and waterways	94%	91%	96%	97%	90%	92%
Remote, untouched wilderness	92%	87%	94%	92%	85%	94%
Authentic campfire and wilderness experiences	91%	86%	93%	92%	89%	83%
Excellent auto/RV touring routes and scenic byways	90%	82%	90%	92%	91%	88%
Friendly and welcoming local communities	89%	78% ▼	93%	91%	85%	86%
Dark skies ideal for stargazing	89%	84%	90%	90%	78%	90%
Rich Indigenous culture and heritage	87%	78%	88%	93%	81%	83%
Opportunities to see the Northern Lights (Aurora Borealis)	87%	75% ▼	91%	89%	84%	84%
Good value for money	82%	68% ▼	88%	87%	80%	68%

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

Base: auto/RV tourers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=780 to 814). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… TOP2 = % somewhat or strongly agree.

VIEW OF A TRIP TO NORTHERN ONTARIO – MARKET

All auto/RV tourers | Includes past visitors to Northern Ontario

Six in ten auto/RV tourers (61%) view Northern Ontario as a destination of choice for auto/RV touring, somewhere they would specifically seek out, while a third (33%) see it as a destination of convenience.

U.S. Fly (79%) and Ontario (73%) tourers are more likely than other markets to see it as a destination of choice.

Rest of Canada tourers are more likely to see it as a destination of convenience (56%) and less likely to see it as a destination of choice (39%).

View of a trip	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
A destination of choice – somewhere I would specifically seek out for auto/RV touring	61%	73% ▲	39% ▼	65%	79% ▲
A destination of convenience – somewhere I might go if it happens to fit my travel plans	33%	23%	56% ▲	28% ▼	17% ▼

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). N10 Which of the following best describes how you would view an auto/RV touring trip to Northern Ontario?

"Not sure" (6%) not shown.

VIEW OF A TRIP TO NORTHERN ONTARIO – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Younger families are more likely than other traveller types to view Northern Ontario as a destination of choice (69%).

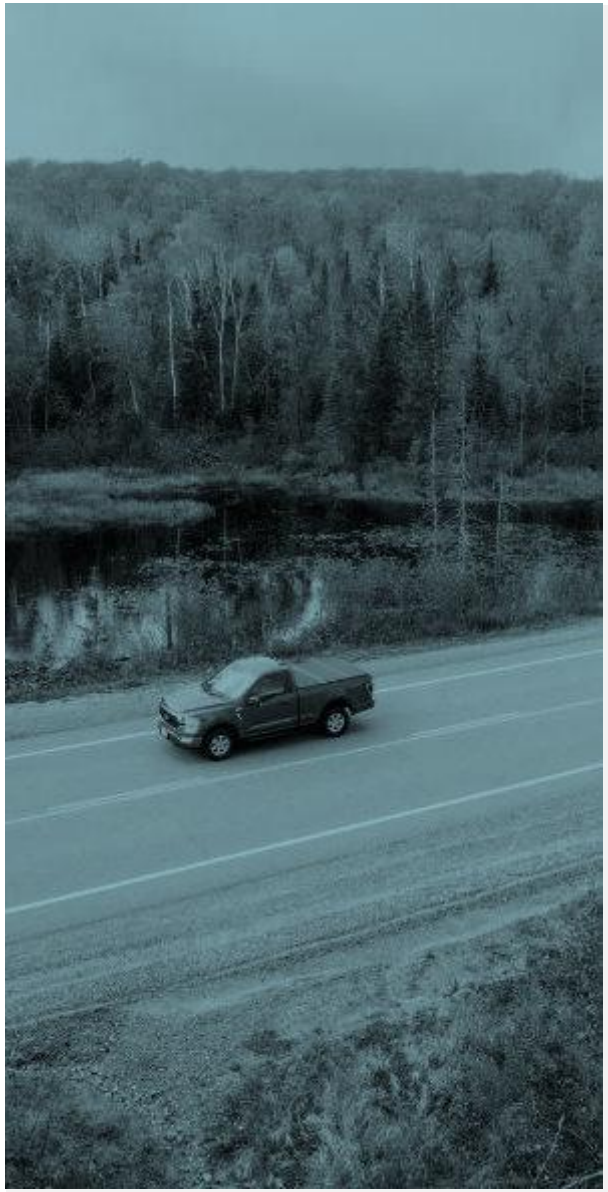
Older friend groups are more likely to see it as a destination of convenience (51%) and less likely to see it as a destination of choice (39%).

View of a trip	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
A destination of choice – somewhere I would specifically seek out for auto/RV touring	61%	57%	69% ▲	62%	65%	39% ▼
A destination of convenience – somewhere I might go if it happens to fit my travel plans	33%	35%	29%	30%	29%	51% ▲

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

Base: all auto/RV tourers (n=1,108). N10 Which of the following best describes how you would view an auto/RV touring trip to Northern Ontario?

"Not sure" (6%) not shown.



FUTURE DEMAND & EXPERIENCES

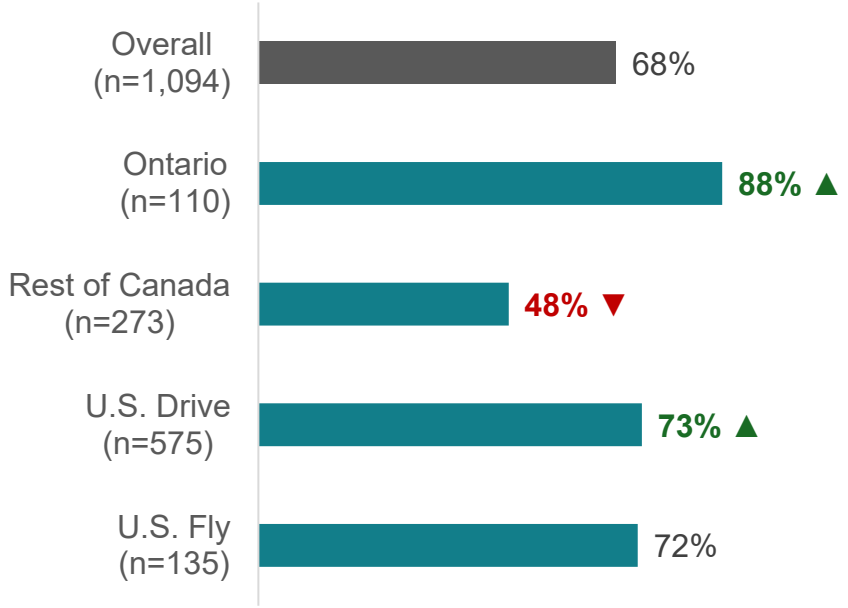
LIKELIHOOD TO VISIT NORTHERN ONTARIO IN THE NEXT 2 YEARS

All auto/RV tourers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Two-thirds of auto/RV tourers (68%) are likely to visit Northern Ontario for an auto/RV touring trip in the next two years, including 39% who are very likely.

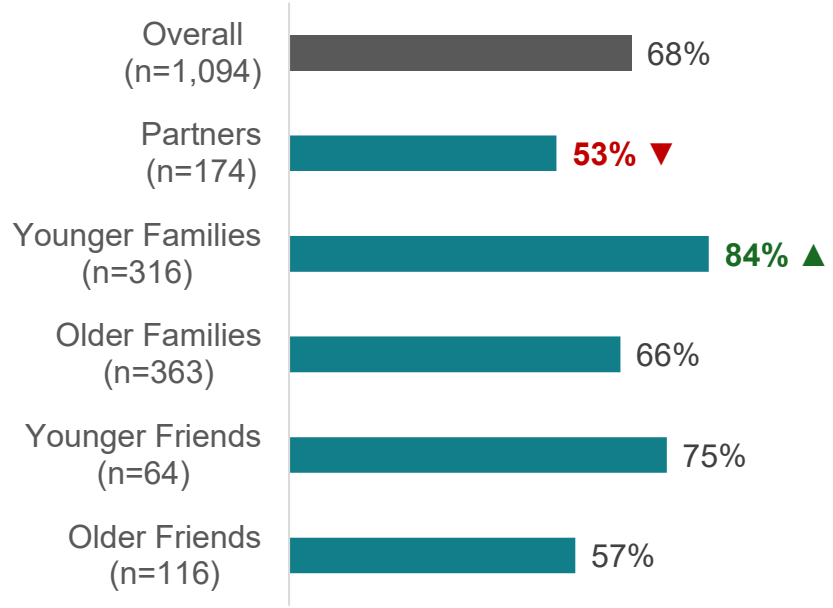
Likelihood is higher among Ontario (88%) and U.S. Drive (73%) tourers and lower among Rest of Canada tourers (48%). Younger families are more likely than other traveller types to visit (84%), while partners are less likely (53%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,094). N4 (TOP2) How likely are you to visit Northern Ontario for an auto/RV touring trip in the next 2 years? TOP2 = % somewhat or very likely.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – MARKET

All auto/RV tourers | Includes past visitors to Northern Ontario

Half of auto/RV tourers (50%) would make Northern Ontario the primary destination of an auto/RV touring trip, with brief stops elsewhere, and 19% would make it the only destination.

Rest of Canada tourers are less likely than other markets to make it the only destination (10%) and more likely to see it as a secondary stop on a trip focused elsewhere (17%).

U.S. Drive tourers are less likely to see it as a secondary stop (3%).

Role of Northern Ontario	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
It would be the only destination of the trip	19%	26%	10% ▼	22%	18%
It would be the primary destination, with brief stops elsewhere	50%	48%	46%	50%	56%
It would be one of several equal destinations	21%	18%	22%	21%	23%
It would be a secondary stop on a trip focused elsewhere	6%	4%	17% ▲	3% ▼	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). N5 If you were to visit Northern Ontario for auto/RV touring, which of the following best describes the role it would play in your trip?

"Not sure" (4%) not shown.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Younger families are more likely than other traveller types to make Northern Ontario the only destination of their trip (29%), while partners are less likely (9%).

Older friend groups are more likely to see it as a secondary stop on a trip focused elsewhere (15%), and younger families are less likely (3%).

Role of Northern Ontario	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
It would be the only destination of the trip	19%	9% ▼	29% ▲	22%	10%	7%
It would be the primary destination, with brief stops elsewhere	50%	54%	51%	47%	56%	43%
It would be one of several equal destinations	21%	23%	17%	22%	18%	27%
It would be a secondary stop on a trip focused elsewhere	6%	8%	3% ▼	5%	12%	15% ▲

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

Base: all auto/RV tourers (n=1,108). N5 If you were to visit Northern Ontario for auto/RV touring, which of the following best describes the role it would play in your trip?

"Not sure" (4%) not shown.

FACTORS IN DECIDING TO VISIT – MARKET (1 OF 3)

All auto/RV tourers | Includes past visitors to Northern Ontario

Nine in ten or more auto/RV tourers say safety and reliability (93%), cost and affordability (92%), access to nature and wilderness (92%) and the quality of routes, trails or waterways (91%) are important when deciding whether to visit Northern Ontario.

U.S. Drive tourers place more importance than other markets on the quality of routes, trails or waterways (94%) and on travel time and ease of access (92%), while Rest of Canada tourers place less importance on route quality (86%).

Factor	Overall (n=1,103)	Ontario (n=113)	Rest of Canada (n=275)	U.S. Drive (n=581)	U.S. Fly (n=136)
Safety and reliability of the destination	93%	93%	91%	94%	96%
Cost and overall affordability	92%	90%	91%	93%	91%
Access to nature and wilderness	92%	87%	89%	94%	93%
Quality/condition of routes, trails, or waterways for auto/RV touring (e.g., road/trail surface, grooming, water conditions)	91%	86%	86% ▼	94% ▲	96%
Travel time and ease of access	89%	80%	85%	92% ▲	89%
Quality of accommodation options	89%	84%	89%	89%	88%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,089 to 1,103). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for auto/RV touring? TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – MARKET (2 OF 3)

All auto/RV tourers | Includes past visitors to Northern Ontario

Between 82% and 88% say each of the next set of factors is important, led by the ability to get away from it all (88%) and a strong reputation or positive word of mouth (86%).

U.S. Drive and U.S. Fly tourers place more importance than other markets on several of these factors, including getting away from it all (93% and 96%) and the variety of routes or areas available (90% and 94%).

Rest of Canada tourers place less importance on five of the six factors, and Ontario tourers on clear and manageable licensing or permit requirements (68%).

Factor	Overall (n=1,103)	Ontario (n=113)	Rest of Canada (n=275)	U.S. Drive (n=581)	U.S. Fly (n=136)
Ability to get away from it all	88%	81%	77% ▼	93% ▲	96% ▲
Strong reputation or positive word of mouth	86%	84%	78% ▼	88%	94% ▲
Variety and range of auto/RV touring routes or areas available	85%	78%	76% ▼	90% ▲	94% ▲
Licensing, registration or permit requirements that are clear and manageable	85%	68% ▼	76% ▼	92% ▲	90%
Cell phone or internet connectivity at the destination	85%	86%	77% ▼	88%	90%
More accommodation available during the times I want to visit	82%	75%	78%	84%	87%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,089 to 1,103). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for auto/RV touring? TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – MARKET (3 OF 3)

All auto/RV tourers | Includes past visitors to Northern Ontario

Fewer say activity-specific infrastructure (79%), activities for non-auto/RV touring travel companions (72%), Indigenous cultural experiences (61%), outfitters, guides or operators (58%) or auto/RV touring events (43%) are important.

U.S. Fly tourers place more importance than other markets on each of these except infrastructure, while Rest of Canada tourers place less importance on each except infrastructure.

Ontario tourers place less importance on activity-specific infrastructure (58%).

Factor	Overall (n=1,103)	Ontario (n=113)	Rest of Canada (n=275)	U.S. Drive (n=581)	U.S. Fly (n=136)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	79%	58% ▼	77%	83%	86%
Availability of activities for non-auto/RV touring travel companions	72%	74%	59% ▼	76%	83% ▲
Indigenous cultural experiences	61%	55%	37% ▼	71% ▲	75% ▲
Availability of outfitters, guides, or operators	58%	50%	36% ▼	67% ▲	72% ▲
Auto/RV touring events or competitions	43%	46%	27% ▼	47%	56% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,089 to 1,103). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for auto/RV touring? TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – TRAVELLER TYPE (1 OF 3)

All auto/RV tourers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

The most important factors are rated similarly across traveller types, with each rated important by 84% or more of every traveller type.

Older friend groups place the most importance on cost and affordability (97%).

Factor	Overall (n=1,103)	Partners (n=175)	Younger Families (n=317)	Older Families (n=367)	Younger Friends (n=66)	Older Friends (n=118)
Safety and reliability of the destination	93%	90%	95%	95%	92%	94%
Cost and overall affordability	92%	88%	93%	92%	84%	97%
Access to nature and wilderness	92%	89%	94%	92%	90%	89%
Quality/condition of routes, trails, or waterways for auto/RV touring (e.g., road/trail surface, grooming, water conditions)	91%	90%	91%	91%	92%	94%
Travel time and ease of access	89%	86%	92%	88%	85%	86%
Quality of accommodation options	89%	86%	91%	86%	90%	90%

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

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,089 to 1,103). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for auto/RV touring? TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – TRAVELLER TYPE (2 OF 3)

All auto/RV tourers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Younger families place more importance than other traveller types on the variety of routes or areas available (91%) and on clear and manageable licensing or permit requirements (92%).

Partners place the least importance on a strong reputation or positive word of mouth (78%).

Factor	Overall (n=1,103)	Partners (n=175)	Younger Families (n=317)	Older Families (n=367)	Younger Friends (n=66)	Older Friends (n=118)
Ability to get away from it all	88%	91%	90%	89%	86%	82%
Strong reputation or positive word of mouth	86%	78%	90%	87%	81%	82%
Variety and range of auto/RV touring routes or areas available	85%	83%	91% ▲	83%	85%	84%
Licensing, registration or permit requirements that are clear and manageable	85%	79%	92% ▲	84%	78%	82%
Cell phone or internet connectivity at the destination	85%	83%	86%	87%	85%	81%
More accommodation available during the times I want to visit	82%	79%	86%	80%	83%	81%

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

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,089 to 1,103). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for auto/RV touring? TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – TRAVELLER TYPE (3 OF 3)

All auto/RV tourers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Younger families place more importance than other traveller types on each of these factors, from 63% for auto/RV touring events to 89% for activity-specific infrastructure.

Younger friend groups also place more importance on outfitters, guides or operators (74%) and on auto/RV touring events (64%), while partners place less importance on activities for non-auto/RV touring companions (51%), outfitters (30%) and events (25%).

Factor	Overall (n=1,103)	Partners (n=175)	Younger Families (n=317)	Older Families (n=367)	Younger Friends (n=66)	Older Friends (n=118)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	79%	72%	89% ▲	78%	84%	68%
Availability of activities for non-auto/RV touring travel companions	72%	51% ▼	85% ▲	73%	85%	62%
Indigenous cultural experiences	61%	52%	73% ▲	58%	62%	50%
Availability of outfitters, guides, or operators	58%	30% ▼	76% ▲	59%	74% ▲	41%
Auto/RV touring events or competitions	43%	25% ▼	63% ▲	39%	64% ▲	29%

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

Base: all auto/RV tourers, excluding “Don’t know”; bases vary by item (n=1,089 to 1,103). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for auto/RV touring? TOP2 = % somewhat or very important.

PREFERRED ACCESS TYPES – MARKET

All auto/RV tourers

Nine in ten auto/RV tourers (90%) prefer road-accessible areas for an auto/RV touring trip to Northern Ontario. Fewer than one in five prefer remote boat-in (18%), train-in (18%) or fly-in or float plane access (15%).

U.S. Fly tourers are more likely than other markets to prefer each of the remote access types (31% to 35%).

Rest of Canada tourers are less likely to prefer train-in (11%) or fly-in or float plane access (8%).

Access type	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Road-accessible areas	90%	95%	94%	88%	90%
Remote boat-in access	18%	13%	12%	19%	33% ▲
Train-in access	18%	16%	11% ▼	18%	35% ▲
Fly-in or float plane access	15%	9%	8% ▼	15%	31% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). N7 For an auto/RV touring trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (3%) not shown.

PREFERRED ACCESS TYPES – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer remote boat-in (28%) and fly-in or float plane access (22%), while partners are less likely to prefer boat-in access (9%).

Road-accessible areas are preferred by 87% to 94% of every traveller type.

Access type	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Road-accessible areas	90%	93%	89%	90%	87%	94%
Remote boat-in access	18%	9% ▼	28% ▲	15%	20%	15%
Train-in access	18%	14%	20%	16%	25%	25%
Fly-in or float plane access	15%	10%	22% ▲	14%	24%	5%

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

Base: all auto/RV tourers (n=1,108). N7 For an auto/RV touring trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (3%) not shown.

PREFERRED LODGING OPTIONS – MARKET

All auto/RV tourers

Designated campgrounds (58%) are the most preferred lodging option for an auto/RV touring trip to Northern Ontario, followed by hotels or motels (48%), drive-in lodges or resorts (45%) and short-term rentals (43%).

U.S. Fly tourers are more likely than other markets to prefer commercial cottage or cabin rentals (53%) and fly-in or remote outpost camps (17%).

Ontario tourers are less likely to prefer commercial cottage or cabin rentals (23%), and U.S. Drive tourers are less likely to prefer staying at the home of friends or relatives (14%).

Lodging option	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Designated campground (private or provincial park)	58%	47%	69%	57%	51%
Hotel or motel	48%	48%	50%	46%	51%
Drive-in lodge or resort	45%	47%	35%	48%	49%
Short-term rental (e.g., AirBnB, Vrbo)	43%	42%	42%	44%	47%
Commercial cottage or cabin rental	39%	23% ▼	33%	42%	53% ▲
Private cottage (owned or borrowed)	34%	42%	33%	32%	38%
Backcountry or wilderness camping	30%	22%	25%	34%	33%
Home of friends or relatives (unpaid)	18%	26%	23%	14% ▼	21%
Fly-in or remote outpost camp	9%	10%	7%	8%	17% ▲
Other	<1%	0%	1%	<1%	<1%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). N8 Which of the following lodging options would you prefer on an auto/RV touring trip to Northern Ontario? Please select all that apply.

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

PREFERRED LODGING OPTIONS – TRAVELLER TYPE

All auto/RV tourers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer backcountry or wilderness camping (38%) and fly-in or remote outpost camps (14%).

Older friend groups show the highest preference for hotels or motels (67%), drive-in lodges or resorts (63%) and short-term rentals (53%).

Lodging option	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Designated campground (private or provincial park)	58%	55%	58%	59%	47%	64%
Hotel or motel	48%	52%	43%	42%	52%	67%
Drive-in lodge or resort	45%	39%	41%	43%	47%	63%
Short-term rental (e.g., AirBnB, Vrbo)	43%	38%	43%	44%	38%	53%
Commercial cottage or cabin rental	39%	36%	36%	41%	39%	49%
Private cottage (owned or borrowed)	34%	26%	35%	35%	33%	37%
Backcountry or wilderness camping	30%	24%	38% ▲	28%	43%	22%
Home of friends or relatives (unpaid)	18%	14%	21%	19%	31%	13%
Fly-in or remote outpost camp	9%	4%	14% ▲	9%	11%	5%
Other	<1%	1%	<1%	1%	2%	0%

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

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

Base: all auto/RV tourers (n=1,108). N8 Which of the following lodging options would you prefer on an auto/RV touring trip to Northern Ontario? Please select all that apply.

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

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

Auto/RV tourers who have visited Northern Ontario in the past 5 years

Better value for money (40%) is the top factor that would encourage past-five-year visitors to spend more nights in Northern Ontario, followed by better availability of quality paid accommodation (32%) and better cell or internet connectivity (29%).

U.S. Fly visitors are more likely than other markets to want more things to do beyond auto/RV touring for their travel companions (44%).

Better value for money is highest among Ontario visitors (49%).

Factor	Overall (n=563)	Ontario (n=93)	Rest of Canada (n=110)	U.S. Drive (n=290)	U.S. Fly (n=70)
Better value for money overall	40%	49%	38%	37%	43%
Better availability of quality paid accommodation (lodges, hotels, cottages)	32%	35%	24%	32%	42%
Better cell or internet connectivity	29%	36%	24%	28%	34%
More things to do beyond auto/RV touring for my travel companions	28%	25%	20%	29%	44% ▲
Improved road, trail, or water access infrastructure	28%	24%	26%	27%	37%
More accommodation available during the times I want to visit	26%	24%	22%	25%	36%
Better RV hookup availability	21%	17%	16%	23%	27%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who have visited Northern Ontario for auto/RV touring in the past 5 years (n=563). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

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

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

Auto/RV tourers who have visited Northern Ontario in the past 5 years

About one in five would stay longer for more packaged or all-inclusive experiences (20%), events or competitions timed to their travel (20%), Indigenous cultural experiences (18%), secure equipment or vehicle storage (18%) or a guided multi-stop itinerary (18%). One in eight (12%) are already satisfied with the length of their stays.

Interest in Indigenous cultural experiences ranges from 4% among Rest of Canada visitors to 30% among U.S. Fly visitors.

Factor	Overall (n=563)	Ontario (n=93)	Rest of Canada (n=110)	U.S. Drive (n=290)	U.S. Fly (n=70)
More packaged or all-inclusive experiences	20%	18%	11%	23%	26%
Events or competitions timed to my travel	20%	14%	17%	22%	25%
Indigenous cultural experiences	18%	15%	4%	22%	30%
Better availability of secure equipment or vehicle storage	18%	12%	17%	18%	25%
A guided multi-stop itinerary combining activities or sub-regions	18%	21%	11%	19%	21%
Other	1%	2%	4%	0%	0%
Nothing – I am already satisfied with the length of my stays	12%	15%	13%	13%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: auto/RV tourers who have visited Northern Ontario for auto/RV touring in the past 5 years (n=563). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

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

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

Auto/RV tourers 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 say improved road, trail, or water access infrastructure would encourage longer stays (37%).

Older friend groups are the most likely to cite better value for money (53%) and the least likely to cite more things to do for their travel companions (8%) or better RV hookup availability (0%).

Factor	Overall (n=563)	Partners (n=73)	Younger Families (n=218)	Older Families (n=159)	Younger Friends (n=42)	Older Friends (n=47)
Better value for money overall	40%	31%	42%	38%	38%	53%
Better availability of quality paid accommodation (lodges, hotels, cottages)	32%	33%	33%	27%	42%	35%
Better cell or internet connectivity	29%	31%	31%	26%	31%	33%
More things to do beyond auto/RV touring for my travel companions	28%	24%	31%	32%	30%	8%
Improved road, trail, or water access infrastructure	28%	10%	37% ▲	24%	29%	36%
More accommodation available during the times I want to visit	26%	23%	28%	25%	24%	20%
Better RV hookup availability	21%	15%	27%	20%	35%	0%

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

Base: auto/RV tourers who have visited Northern Ontario for auto/RV touring in the past 5 years (n=563). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

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

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

Auto/RV tourers who have visited Northern Ontario in the past 5 years | Traveller types are defined on slide 10

Younger families are also more likely to say a guided multi-stop itinerary (26%) and secure equipment or vehicle storage (25%) would encourage longer stays.

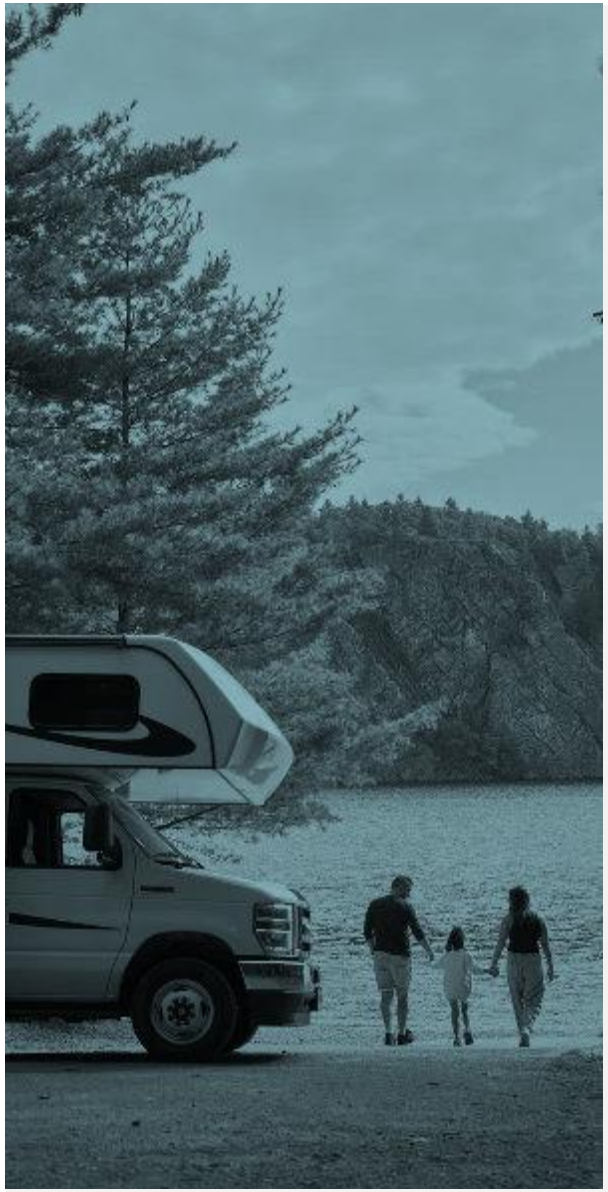
Older friend groups (32%) and partners (24%) are the most likely to be already satisfied with the length of their stays.

Factor	Overall (n=563)	Partners (n=73)	Younger Families (n=218)	Older Families (n=159)	Younger Friends (n=42)	Older Friends (n=47)
More packaged or all-inclusive experiences	20%	11%	26%	19%	25%	7%
Events or competitions timed to my travel	20%	15%	26%	18%	28%	0%
Indigenous cultural experiences	18%	13%	18%	18%	25%	14%
Better availability of secure equipment or vehicle storage	18%	10%	25% ▲	15%	24%	5%
A guided multi-stop itinerary combining activities or sub-regions	18%	7%	26% ▲	15%	16%	9%
Other	1%	0%	<1%	4% ▲	0%	0%
Nothing – I am already satisfied with the length of my stays	12%	24%	7%	11%	2%	32%

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

Base: auto/RV tourers who have visited Northern Ontario for auto/RV touring in the past 5 years (n=563). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

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



BARRIERS & COMPETITION

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

All auto/RV tourers | Includes past visitors to Northern Ontario

Cost (41%) is the most common barrier to visiting or returning to Northern Ontario for auto/RV touring, followed by unfavourable weather or season timing (39%), high transportation costs (39%) and wildfires, flooding or other environmental disruptions (38%).

Rest of Canada tourers are more likely than other markets to be discouraged by cost (57%) and poor value for money (51%), while U.S. Drive and U.S. Fly tourers are less likely to be discouraged by either.

Ontario tourers are more likely to be discouraged by unfavourable weather or season timing (57%), while U.S. Drive tourers are less likely to be discouraged by weather (34%) or environmental disruptions (34%).

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

Barrier	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Cost	41%	50%	57% ▲	35% ▼	28% ▼
Unfavourable weather or season timing	39%	57% ▲	47%	34% ▼	31%
High transportation costs (gas, airfare)	39%	45%	47%	36%	35%
Wildfires, flooding, or other environmental disruptions	38%	50%	47%	34% ▼	29%
Concerns about safety	35%	42%	42%	31%	32%
Poor road, trail, or water access	34%	40%	41%	32%	29%
Poor value for money	33%	34%	51% ▲	27% ▼	23% ▼
Expensive licensing, registration, or permit requirements	32%	24%	35%	34%	26%
Lack of amenities or services at the destination	28%	30%	35%	24%	27%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for auto/RV touring? Please select all that apply.

"Not sure" (3%) not shown. "Anti-American sentiment" and "Concerns about crossing the Canada-US border" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all auto/RV tourers, and significance is not shown.

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

All auto/RV tourers | Includes past visitors to Northern Ontario

About a quarter of auto/RV tourers are discouraged by complicated licensing, registration or permit requirements (28%), limited accommodation options (27%), poor or unreliable connectivity (27%) or insects (25%).

Ontario tourers are more likely than other markets to be discouraged by poor or unreliable cell phone or internet connectivity (39%) and by insects (37%).

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

Barrier	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Complicated licensing, registration, or permit requirements	28%	17%	33%	26%	33%
Limited accommodation options	27%	30%	34%	24%	22%
Poor or unreliable cell phone or internet connectivity	27%	39% ▲	23%	25%	32%
Insects (e.g., blackflies, mosquitoes)	25%	37% ▲	26%	24%	20%
Unfamiliar or unclear regulations	24%	19%	25%	25%	26%
Too far to drive	23%	30%	24%	22%	21%
Availability of campsites or RV sites	22%	12%	29%	20%	23%
Limited RV hookup availability	21%	21%	20%	22%	19%
Too remote or rugged for my comfort level	18%	24%	25%	15%	16%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for auto/RV touring? Please select all that apply.

"Not sure" (3%) not shown. "Anti-American sentiment" and "Concerns about crossing the Canada-US border" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all auto/RV tourers, and significance is not shown.

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

All auto/RV tourers | Includes past visitors to Northern Ontario

Fewer than one in five auto/RV tourers are discouraged by each of the remaining barriers, including difficulty finding reliable trip planning information (18%) and not knowing enough about Northern Ontario's auto/RV touring opportunities (16%).

Among U.S. tourers, about three in ten U.S. Drive and U.S. Fly tourers cite anti-American sentiment (28% and 30%), and a quarter or more cite concerns about crossing the Canada-US border (25% and 28%).

Barrier	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Difficulty finding reliable trip planning information	18%	15%	25%	16%	19%
Anti-American sentiment	18%	–	–	28%	30%
Vehicle registration or insurance requirements across jurisdictions	18%	10%	20%	19%	18%
Concerns about crossing the Canada-US border	17%	–	–	25%	28%
I do not know enough about Northern Ontario's auto/RV touring opportunities	16%	9%	20%	17%	13%
Lack of secure equipment or vehicle storage	11%	11%	9%	11%	17%
Not sure the auto/RV touring quality would meet my expectations	6%	9%	4%	7%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for auto/RV touring? Please select all that apply.

"Not sure" (3%) not shown. "Anti-American sentiment" and "Concerns about crossing the Canada-US border" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all auto/RV tourers, and significance is not shown.

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

All auto/RV tourers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Older friend groups are more likely than other traveller types to be discouraged by several of these barriers, including wildfires and other environmental disruptions (65%), poor value for money (61%) and concerns about safety (57%).

Younger families are less likely to be discouraged by most of these barriers, including cost (29%). Partners are more likely to be discouraged by poor road, trail or water access (45%).

Barrier	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Cost	41%	50%	29% ▼	47%	40%	39%
Unfavourable weather or season timing	39%	43%	32% ▼	39%	35%	53%
High transportation costs (gas, airfare)	39%	46%	32% ▼	41%	24% ▼	47%
Wildfires, flooding, or other environmental disruptions	38%	44%	33%	34%	23% ▼	65% ▲
Concerns about safety	35%	39%	27% ▼	33%	23%	57% ▲
Poor road, trail, or water access	34%	45% ▲	26% ▼	31%	32%	47%
Poor value for money	33%	39%	27% ▼	30%	27%	61% ▲
Expensive licensing, registration, or permit requirements	32%	36%	24% ▼	33%	23%	50% ▲
Lack of amenities or services at the destination	28%	26%	22% ▼	27%	24%	46% ▲

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

Base: all auto/RV tourers (n=1,108). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for auto/RV touring? Please select all that apply.

"Not sure" (3%) not shown. "Anti-American sentiment" and "Concerns about crossing the Canada-US border" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all auto/RV tourers, and significance is not shown.

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

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

All auto/RV tourers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Older friend groups are also more likely to be discouraged by complicated licensing, registration or permit requirements (48%) and limited accommodation options (43%).

Being too far to drive is cited most by partners (28%) and older families (25%).

Barrier	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Complicated licensing, registration, or permit requirements	28%	30%	23%	24%	17%	48% ▲
Limited accommodation options	27%	29%	23%	26%	19%	43% ▲
Poor or unreliable cell phone or internet connectivity	27%	28%	26%	24%	19%	33%
Insects (e.g., blackflies, mosquitoes)	25%	24%	26%	24%	16%	25%
Unfamiliar or unclear regulations	24%	31%	25%	21%	14%	27%
Too far to drive	23%	28%	19%	25%	23%	16%
Availability of campsites or RV sites	22%	24%	20%	20%	18%	33%
Limited RV hookup availability	21%	20%	24%	19%	11%	33%
Too remote or rugged for my comfort level	18%	25%	14%	15%	13%	27%

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

Base: all auto/RV tourers (n=1,108). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for auto/RV touring? Please select all that apply.

"Not sure" (3%) not shown. "Anti-American sentiment" and "Concerns about crossing the Canada-US border" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all auto/RV tourers, and significance is not shown.

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

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

All auto/RV tourers | Traveller types are defined on slide 10 | Includes past visitors to Northern Ontario

Older friend groups are more likely than other traveller types to be discouraged by vehicle registration or insurance requirements across jurisdictions (32%).

Younger families are less likely to say they do not know enough about Northern Ontario's auto/RV touring opportunities (9%).

Barrier	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Difficulty finding reliable trip planning information	18%	13%	19%	17%	15%	26%
Anti-American sentiment	18%	31%	13%	16%	9%	25%
Vehicle registration or insurance requirements across jurisdictions	18%	23%	14%	15%	11%	32% ▲
Concerns about crossing the Canada-US border	17%	22%	13%	18%	9%	17%
I do not know enough about Northern Ontario's auto/RV touring opportunities	16%	24%	9% ▼	19%	11%	22%
Lack of secure equipment or vehicle storage	11%	11%	14%	8%	11%	20%
Not sure the auto/RV touring quality would meet my expectations	6%	9%	7%	4%	7%	5%

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

Base: all auto/RV tourers (n=1,108). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for auto/RV touring? Please select all that apply.

"Not sure" (3%) not shown. "Anti-American sentiment" and "Concerns about crossing the Canada-US border" were asked of U.S. respondents only (– for Canadian markets); Overall and traveller type results for these items are based on all auto/RV tourers, and significance is not shown.

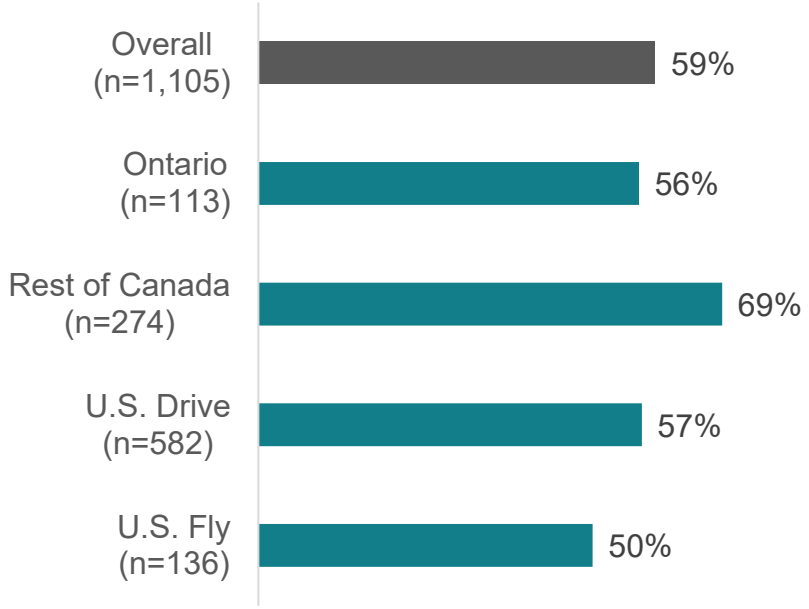
IMPACT OF FINANCIAL PRESSURES ON TRAVEL PLANS

All auto/RV tourers | Traveller types are defined on slide 10

Six in ten auto/RV tourers (59%) agree that financial pressures have impacted their travel plans in the next 12 months.

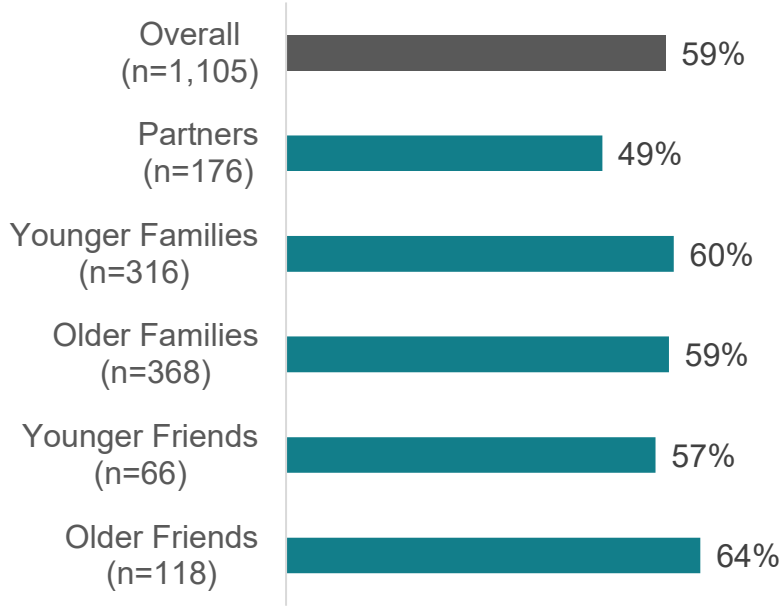
Agreement ranges from 50% among U.S. Fly tourers to 69% among Rest of Canada tourers, and from 49% among partners to 64% among older friend groups.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,105). BD1A (TOP2) How much do you agree or disagree with the following statement? “Financial pressures have impacted my travel plans in the next 12 months” TOP2 = % somewhat or strongly agree.

OTHER DESTINATIONS CONSIDERED – MARKET (1 OF 2)

All auto/RV tourers

British Columbia (39%) is the destination auto/RV tourers most often consider instead of Northern Ontario, followed by Alberta (30%), Quebec (29%) and somewhere else in Ontario (28%).

Rest of Canada tourers are more likely than other markets to consider British Columbia (68%) and Alberta (56%), and Ontario tourers Quebec (50%) and somewhere else in Ontario (50%). U.S. Drive tourers are less likely to consider each of these Canadian destinations (18% to 24%).

U.S. Drive tourers most often consider Michigan (42%) and Colorado (40%), and U.S. Fly tourers Colorado (56%) and California (50%).

Destination	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
British Columbia	39%	47%	68% ▲	24% ▼	34%
Alberta	30%	34%	56% ▲	18% ▼	26%
Quebec	29%	50% ▲	33%	23% ▼	27%
Colorado	28%	–	–	40%	56%
Somewhere else in Ontario	28%	50% ▲	32%	23% ▼	21%
Michigan	25%	–	–	42%	24%
California	22%	–	–	29%	50%
Wisconsin	20%	–	–	33%	24%
Texas	19%	–	–	26%	44%
Minnesota	19%	–	–	30%	24%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). BD2 What other destinations do you consider for auto/RV touring trips? "Not sure" (1%) not shown. No Canadian respondents selected a U.S. state (– for Canadian markets); Overall and traveller type results for U.S. states are based on all auto/RV tourers, and significance is not shown for these items.

OTHER DESTINATIONS CONSIDERED – MARKET (2 OF 2)

All auto/RV tourers

Fewer than one in five auto/RV tourers consider each of the remaining destinations, including Manitoba (14%) and Saskatchewan (14%), and 12% name another destination.

Rest of Canada tourers are more likely than other markets to name another destination (19%).

Destination	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Pennsylvania	18%	–	–	29%	21%
New York	17%	–	–	26%	28%
Manitoba	14%	17%	20%	11%	15%
Saskatchewan	14%	12%	17%	13%	17%
Ohio	14%	–	–	22%	18%
Illinois	12%	–	–	21%	13%
New Jersey	10%	–	–	16%	13%
Indiana	9%	–	–	15%	8%
Other	12%	18%	19% ▲	9% ▼	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). BD2 What other destinations do you consider for auto/RV touring trips? "Not sure" (1%) not shown. No Canadian respondents selected a U.S. state (– for Canadian markets); Overall and traveller type results for U.S. states are based on all auto/RV tourers, and significance is not shown for these items.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (1 OF 2)

All auto/RV tourers | Traveller types are defined on slide 10

British Columbia is the most considered alternative for every traveller type, from 35% among partners to 50% among younger friend groups.

Older friend groups are the most likely to consider Alberta (39%) and somewhere else in Ontario (34%).

Destination	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
British Columbia	39%	35%	41%	37%	50%	40%
Alberta	30%	27%	32%	28%	33%	39%
Quebec	29%	32%	32%	26%	31%	26%
Colorado	28%	22%	30%	31%	24%	28%
Somewhere else in Ontario	28%	24%	29%	28%	26%	34%
Michigan	25%	28%	26%	23%	24%	26%
California	22%	19%	28%	22%	20%	10%
Wisconsin	20%	24%	19%	22%	16%	17%
Texas	19%	22%	22%	18%	17%	18%
Minnesota	19%	17%	23%	17%	18%	15%

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

Base: all auto/RV tourers (n=1,108). BD2 What other destinations do you consider for auto/RV touring trips? "Not sure" (1%) not shown. No Canadian respondents selected a U.S. state (– for Canadian markets); Overall and traveller type results for U.S. states are based on all auto/RV tourers, and significance is not shown for these items.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (2 OF 2)

All auto/RV tourers | Traveller types are defined on slide 10

Partners are more likely than other traveller types to name another destination (24%), while younger families are less likely (3%).

Consideration of each remaining destination is 25% or lower for every traveller type.

Destination	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Pennsylvania	18%	19%	21%	15%	10%	18%
New York	17%	16%	24%	13%	16%	10%
Manitoba	14%	11%	15%	14%	18%	19%
Saskatchewan	14%	13%	12%	13%	17%	18%
Ohio	14%	17%	18%	9%	12%	9%
Illinois	12%	15%	14%	10%	14%	7%
New Jersey	10%	12%	14%	6%	15%	8%
Indiana	9%	15%	12%	5%	7%	9%
Other	12%	24% ▲	3% ▼	14%	9%	14%

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

Base: all auto/RV tourers (n=1,108). BD2 What other destinations do you consider for auto/RV touring trips? "Not sure" (1%) not shown. No Canadian respondents selected a U.S. state (– for Canadian markets); Overall and traveller type results for U.S. states are based on all auto/RV tourers, and significance is not shown for these items.

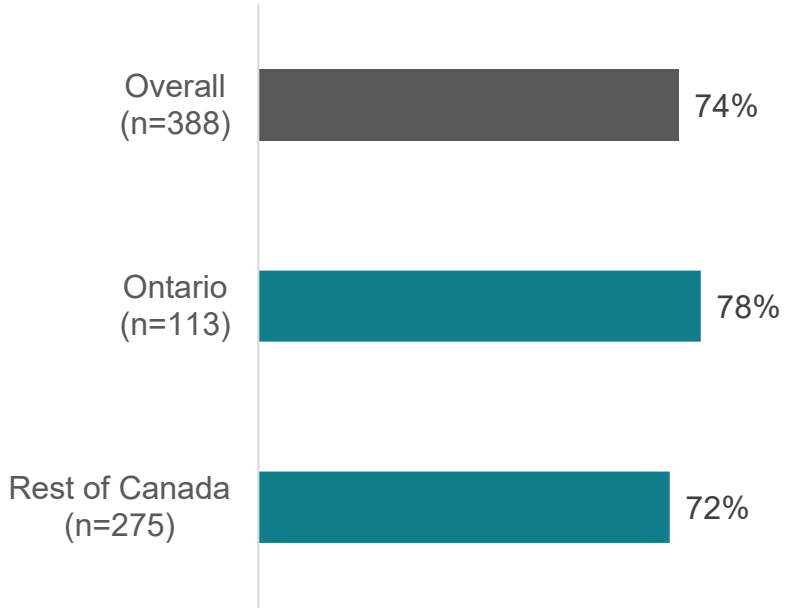
POLITICAL CLIMATE AND CHOOSING NORTHERN ONTARIO

Canadian auto/RV tourers | Traveller types are defined on slide 10

Three-quarters of Canadian auto/RV tourers (74%) are more likely to choose Northern Ontario over the United States because of the current political climate in the U.S., including 59% who strongly agree.

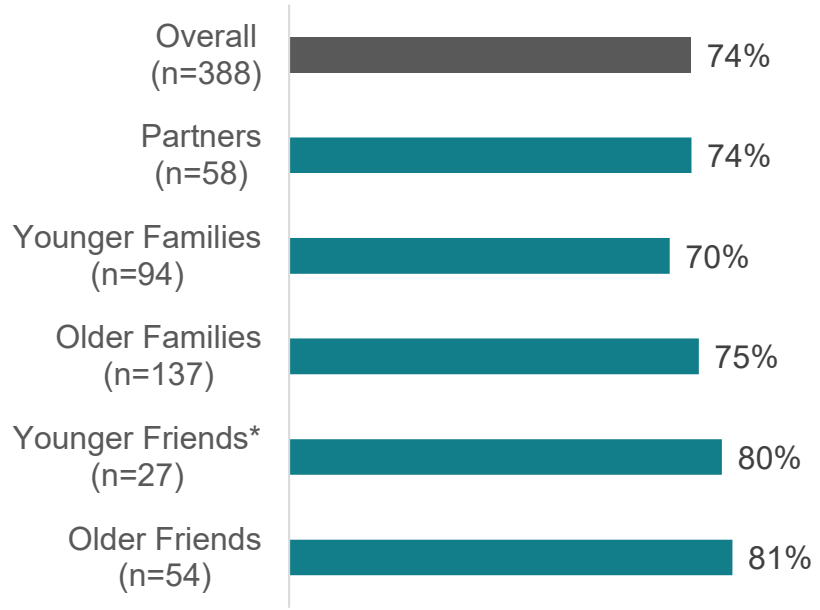
Agreement is 78% among Ontario tourers and 72% among Rest of Canada tourers, and ranges from 70% among younger families to 81% among older friend groups.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian auto/RV tourers, excluding “Don’t know” (n=388). BD3A (TOP2) How much do you agree or disagree with the following statements? “I am more likely to choose Northern Ontario over the United States for travel because of the current political climate in the U.S.” TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

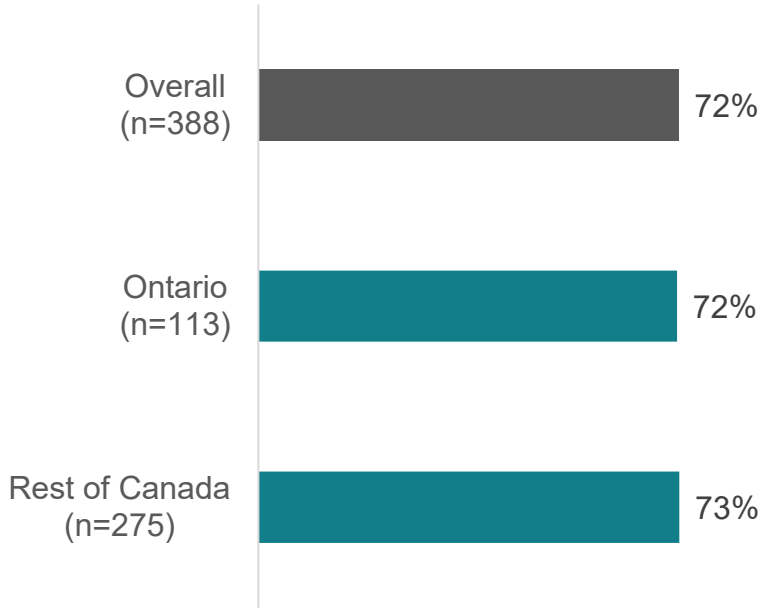
EXCHANGE RATES AND CHOOSING NORTHERN ONTARIO

Canadian auto/RV tourers | Traveller types are defined on slide 10

Seven in ten Canadian auto/RV tourers (72%) are more likely to choose Northern Ontario over the United States because of unfavourable exchange rates.

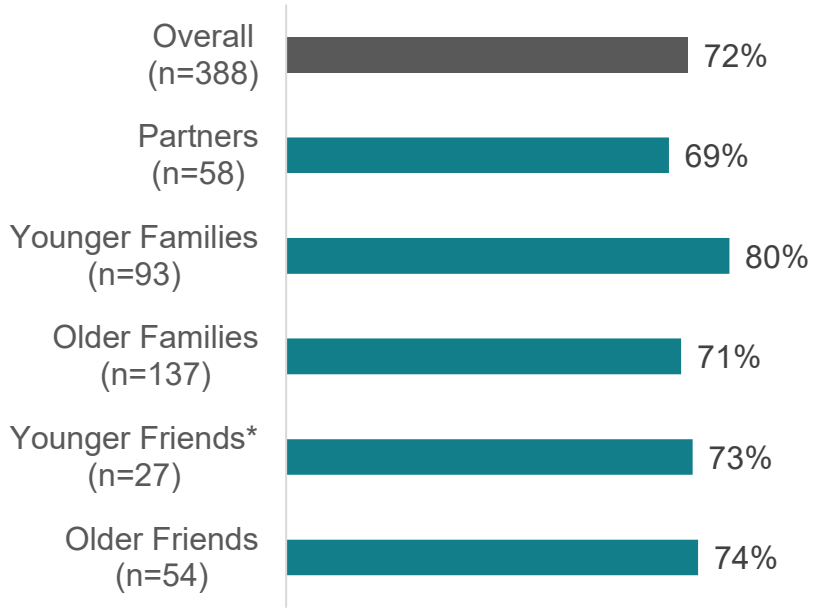
Agreement is 72% among Ontario tourers and 73% among Rest of Canada tourers, and is highest among younger families (80%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian auto/RV tourers, excluding “Don’t know” (n=388). BD3B (TOP2) How much do you agree or disagree with the following statements? “I am more likely to choose Northern Ontario over the United States for travel because of unfavourable exchange rates.” TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

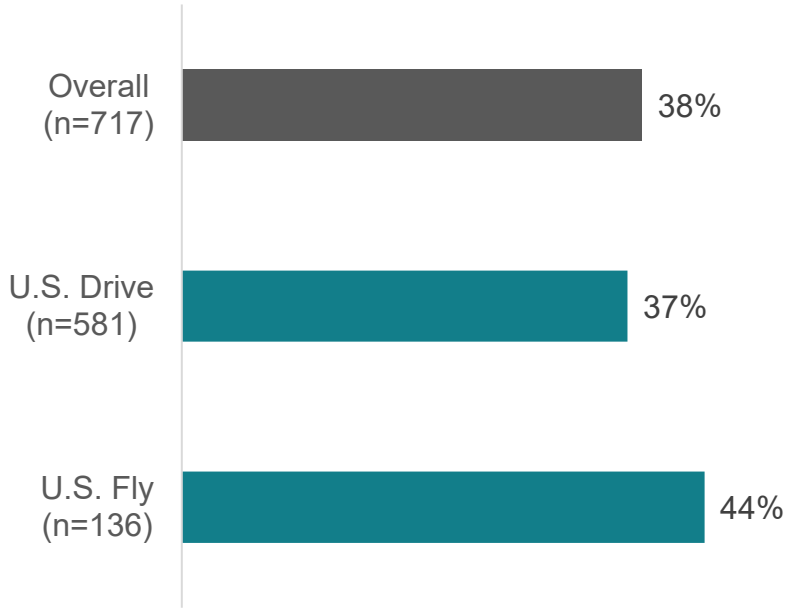
CONCERN ABOUT CROSSING THE BORDER INTO CANADA

U.S. auto/RV tourers | Traveller types are defined on slide 10

Close to four in ten U.S. auto/RV tourers (38%) are concerned about crossing the border to enter Canada, while 46% are not concerned.

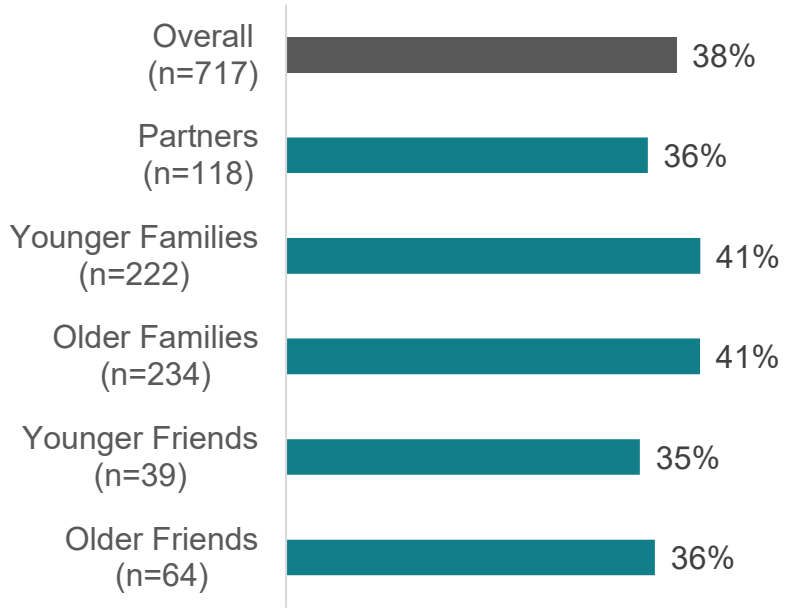
Concern is 37% among U.S. Drive tourers and 44% among U.S. Fly tourers, and ranges from 35% among younger friend groups to 41% among younger and older families.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. auto/RV tourers, excluding “Don’t know” (n=717). BD4A (TOP2) How much do you agree or disagree with the following statements? “I am concerned about crossing the border to enter Canada.” TOP2 = % somewhat or strongly agree.

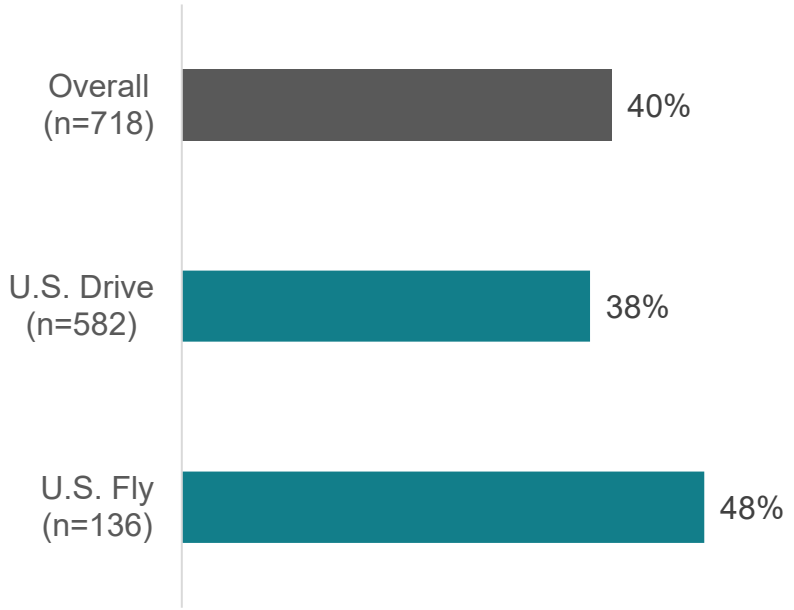
CONCERN ABOUT RETURNING TO THE U.S.

U.S. auto/RV tourers | Traveller types are defined on slide 10

Four in ten U.S. auto/RV tourers (40%) are concerned about crossing the border when returning to the U.S. from Canada.

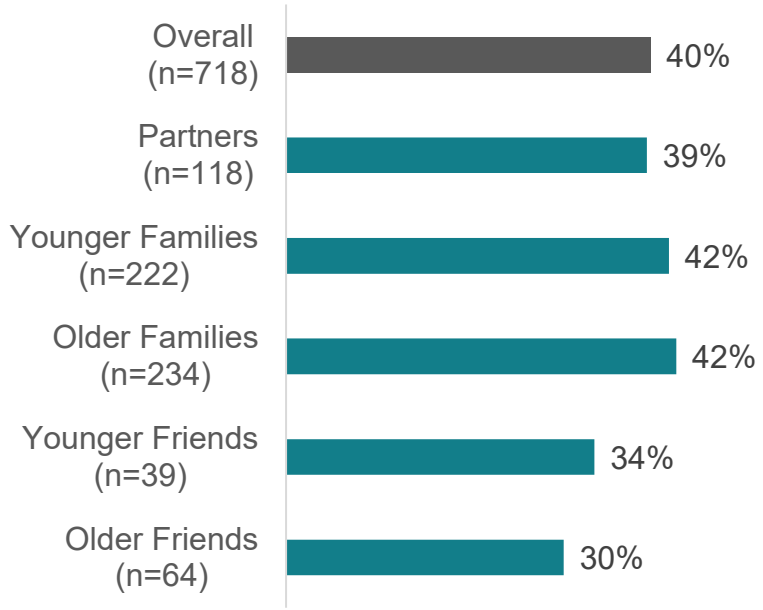
Concern is 48% among U.S. Fly tourers and 38% among U.S. Drive tourers, and ranges from 30% among older friend groups to 42% among younger and older families.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. auto/RV tourers, excluding “Don’t know” (n=718). BD4B (TOP2) How much do you agree or disagree with the following statements? “I am concerned about crossing the border returning to the US from Canada.” TOP2 = % somewhat or strongly agree.