CONTEXT RESEARCH GROUP

CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE II
Avid Auto/RV Tourers: Past Visitors 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
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 (this 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 All Tourers report.”



TRAVELLER TYPE SEGMENTS

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

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

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

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

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

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

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



NORTHERN ONTARIO - REGIONS

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

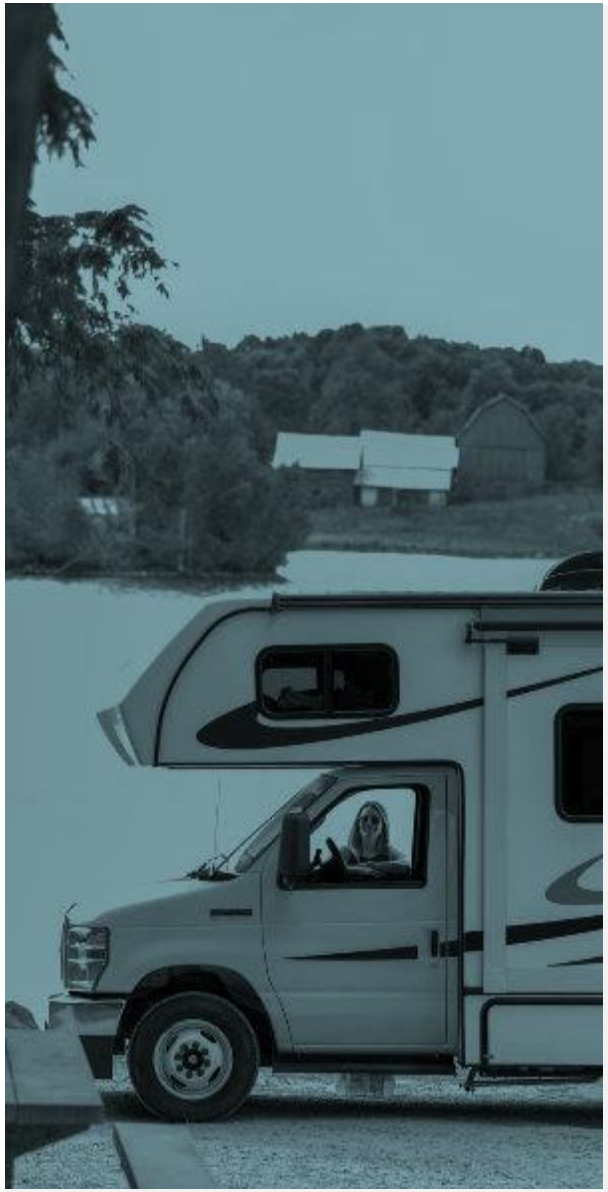
Northwest Ontario - Superior Country
e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area

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

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

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





EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – PAST VISITORS: WHO THEY ARE & WHAT THEY DID

PAST NORTHERN ONTARIO VISITORS - AVID AUTO/RV TOURERS

Half of tourers have toured Northern Ontario in the past five years, and they are younger, committed tourers. Past visitors are mostly U.S. Drive (52%), Rest of Canada (20%), Ontario (16%) and U.S. Fly (12%) tourers. Half (50%) are aged 30 to 44, 65% have children at home and 47% strongly agree touring is central to who they are. A third (35%) tour by motorhome, many also hold boating, ORV and snowmobile credentials, half (50%) know a lot about the region, and 51% have used a certified touring route or passport program. (See slides 18, 58, 80)

Their trips are long road trips mixing campgrounds and paid lodging. Visitors have made an average of 3.2 touring trips to Northern Ontario in five years, mostly in summer (57%) and spring (21%). Two-thirds (65%) stayed in paid roofed lodging, while designated campgrounds were the most used accommodation (46%). (See slides 17, 23, 26, 28)

They rate the trip well, and value and lodging would extend their stays. Three-quarters (74%) rated their trip better than touring elsewhere. Better value (40%), quality paid accommodation (32%) and connectivity (29%) would extend their stays, and better value rises to 51% among visitors concerned about safety. (See slide 34, and slides 137–138 of the All Tourers report)



EXECUTIVE SUMMARY – PAST VISITORS: HOW THEY COMPARE WITH ALL AUTO/RV TOURERS

PAST NORTHERN ONTARIO VISITORS - AVID AUTO/RV TOURERS

Past visitors are more committed to touring. They take a similar number of touring trips a year to auto/RV tourers overall (5.0 vs. 5.2), but more agree that touring is central to who they are (87% vs. 79%) and more say it is always the primary purpose of their trips (37% vs. 28%). They are more likely to mix guided and self-guided touring (43% vs. 31%) and to have used a certified route or passport program (51% vs. 34%). Two-thirds (65%) have children at home, against 54% overall. (See slides 36, 56, 58, 88)

Past visitors know the region better and see fewer barriers. Half of past visitors (50%) know a lot about Northern Ontario, against 30% of auto/RV tourers overall. They are less likely to cite cost (27% vs. 41%), transportation costs (32% vs. 39%), weather (32% vs. 39%), road access (26% vs. 34%) and safety (28% vs. 35%). (See slides 42, 43)

Past visitors are less drawn by scenery and escape, and rely less on search and word of mouth. They are less interested than auto/RV tourers overall in scenic driving (50% vs. 60%) and Northern Lights viewing (55% vs. 62%), and less motivated by escape (62% vs. 70%) and new places (68% vs. 73%). They rely less on internet search (52% vs. 59%) and word of mouth (49% vs. 57%). Nine in ten past visitors (90%) are likely to visit again in the next two years, against 68% overall. (See slides 40, 62, 98)



EXECUTIVE SUMMARY – SUB-REGIONAL PATTERNS

PAST NORTHERN ONTARIO VISITORS - AVID AUTO/RV TOURERS

Visitors spread across the regions, so each region plays a different role. Between 18% and 24% of tourers have visited each region, led by Northeast Ontario (24%) and Algoma Country (23%). Ontario tourers concentrate in The Great Canadian Wilderness (54%) and Northeast Ontario (49%). (See slide 21)

Sunset Country: grow on the best-rated experience. Sunset Country visitors are the most likely to rate their trip better than elsewhere (80%) and the least cost-concerned (20%). They want quality paid accommodation (39%) and road infrastructure (36%), and are more open to winter touring (28%). The practical priority is quality lodging and road investment, and developing a winter touring product.

Superior and Algoma Country: fill coverage and lodging gaps along touring routes. Visitors want better connectivity (36% and 35%), and Algoma visitors quality paid accommodation (40%); Superior Country visitors cite weather least (27%). The practical priority is connectivity along touring corridors and quality accommodation at overnight stops.

Northeast Ontario and The Great Canadian Wilderness: retain loyal, nearby visitors. Nearly all visitors to each region (94%) are likely to return. Great Canadian Wilderness visitors cite weather more (39%) and are more likely to be taking more trips than 10 years ago (53%). The practical priority is shoulder-season and weather-flexible itineraries that sustain this growth.

Safety is a corridor issue, not a regional one. Safety concern is similar across region visitors (24% to 29%), and tourers concerned about safety also cite road access, weather, amenities and connectivity. The practical priority is addressing safety across the touring network through road conditions, services and coverage along the way, rather than targeting a single region.



PAST EXPERIENCE

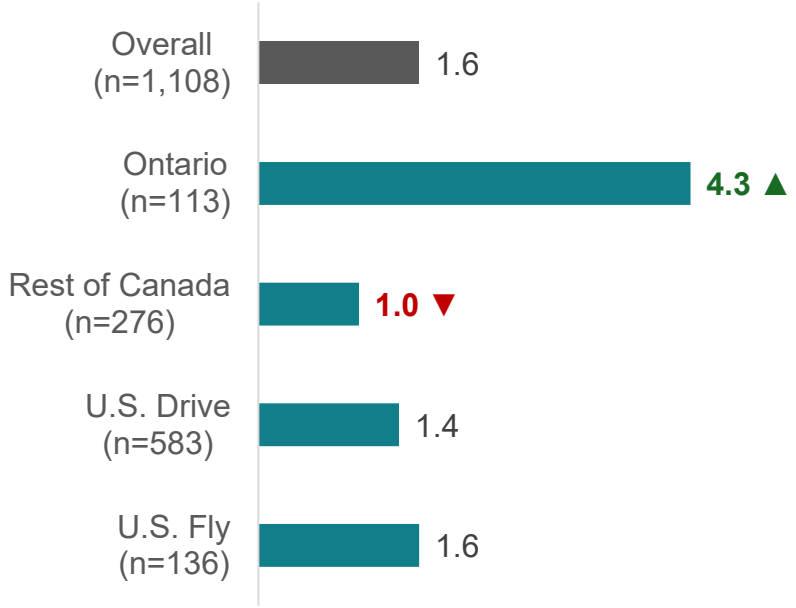
NORTHERN ONTARIO AUTO/RV TOURING TRIPS IN THE PAST 5 YEARS

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

Auto/RV tourers have taken an average of 1.6 auto/RV touring trips to Northern Ontario in the past five years.

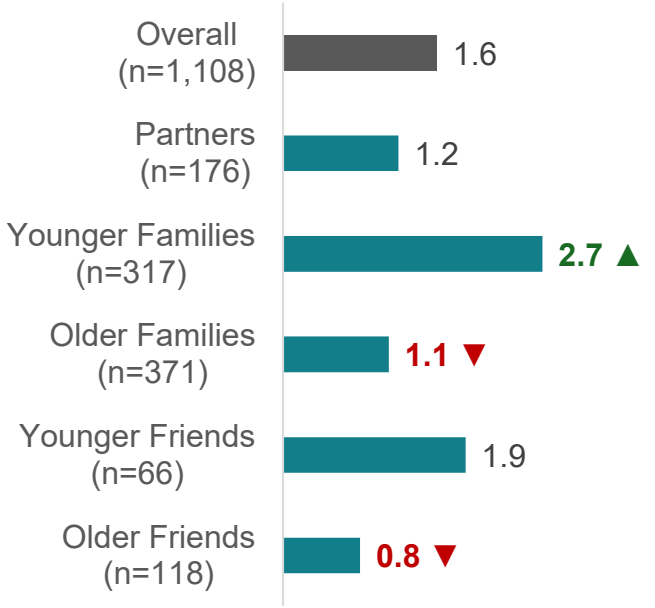
Ontario tourers average the most trips (4.3), well above other markets, while Rest of Canada tourers average the fewest (1.0). Younger families take more trips than other traveller types (2.7), while older families (1.1) and older friend groups (0.8) take fewer.

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). P1 (AVG) In the past 5 years, how many times have you visited Northern Ontario for an auto/RV touring trip?
AVG = average number of trips among all auto/RV tourers, including those who have not visited.

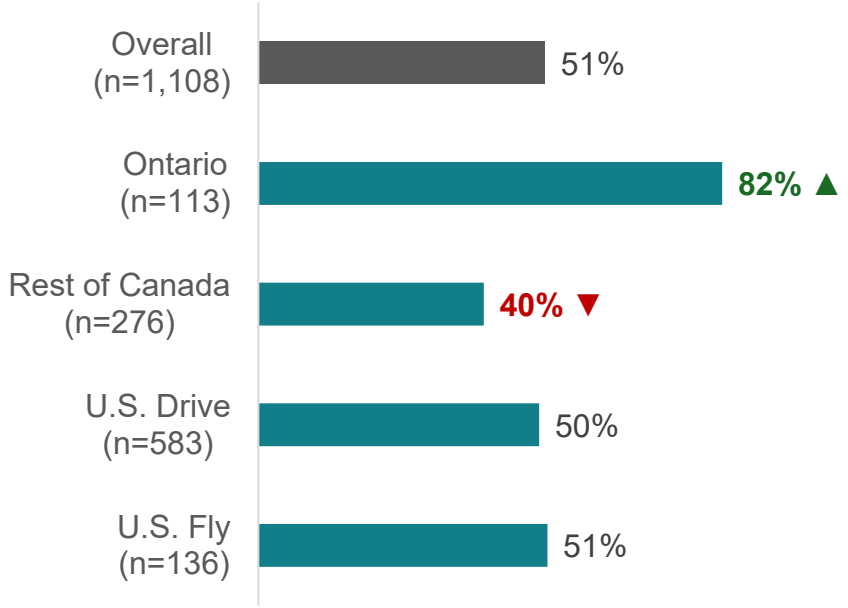
VISITED NORTHERN ONTARIO FOR AUTO/RV TOURING IN THE PAST 5 YEARS

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

Half of auto/RV tourers (51%) have visited Northern Ontario for an auto/RV touring trip in the past five years.

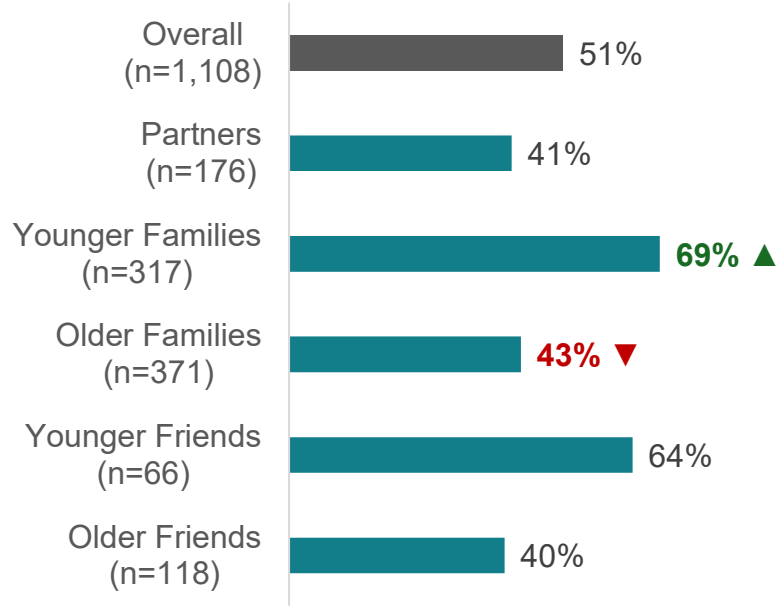
Ontario tourers are more likely than other markets to have visited (82%), while Rest of Canada tourers are less likely (40%). Younger families are more likely than other traveller types to have visited (69%), while older families are less likely (43%).

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). P1 (NET: At least once) In the past 5 years, how many times have you visited Northern Ontario for an auto/RV touring trip? % who have visited at least once shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – MARKET

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

Nearly half of past-five-year visitors (47%) take more auto/RV touring trips in Northern Ontario than they did 10 years ago, while 16% take fewer.

Taking more trips ranges from 32% among Rest of Canada visitors to 57% among U.S. Fly visitors.

Rest of Canada visitors are also the most likely to be taking fewer trips (27%).

Change in trips	Overall (n=563)	Ontario (n=93)	Rest of Canada (n=110)	U.S. Drive (n=290)	U.S. Fly (n=70)
I take more trips than I did 10 years ago	47%	48%	32%	50%	57%
About the same as 10 years ago	36%	29%	41%	38%	33%
I take fewer trips than I did 10 years ago	16%	21%	27%	12%	9%

▲ / ▼ 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). P1B Compared to 10 years ago, how has your participation in auto/RV touring trips in Northern Ontario changed? "Not sure" (1%) not shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – TRAVELLER TYPE

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 be taking more trips than 10 years ago (60%) and less likely to be taking fewer (7%).

Older friend groups are the most likely to be taking fewer trips (36%).

Change in trips	Overall (n=563)	Partners (n=73)	Younger Families (n=218)	Older Families (n=159)	Younger Friends (n=42)	Older Friends (n=47)
I take more trips than I did 10 years ago	47%	32%	60% ▲	43%	51%	29%
About the same as 10 years ago	36%	47%	32%	35%	40%	35%
I take fewer trips than I did 10 years ago	16%	20%	7% ▼	20%	9%	36%

▲ / ▼ 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). P1B Compared to 10 years ago, how has your participation in auto/RV touring trips in Northern Ontario changed? "Not sure" (1%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – MARKET

All auto/RV tourers

About one in five auto/RV tourers have visited each part of Northern Ontario, from 24% for Northeast Ontario to 18% for Sunset Country.

Ontario tourers are more likely than other markets to have visited the Great Canadian Wilderness (54%), Northeast Ontario (49%) and Superior Country (33%).

U.S. Fly tourers are more likely to have visited Sunset Country (27%), while Rest of Canada tourers are less likely to have visited the Great Canadian Wilderness (13%).

Region	Overall (n=1,108)	Ontario (n=113)	Rest of Canada (n=276)	U.S. Drive (n=583)	U.S. Fly (n=136)
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	24%	49% ▲	20%	21%	21%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	23%	31%	22%	21%	25%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	22%	33% ▲	15%	22%	22%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	21%	54% ▲	13% ▼	18%	20%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	18%	22%	17%	16%	27% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all auto/RV tourers (n=1,108). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply.

"Not sure" (1%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to have visited every part of Northern Ontario, from 26% for Sunset Country to 36% for Northeast Ontario.

Younger friend groups are more likely to have visited Superior Country (36%), while older families are less likely to have visited Algoma Country (15%).

Region	Overall (n=1,108)	Partners (n=176)	Younger Families (n=317)	Older Families (n=371)	Younger Friends (n=66)	Older Friends (n=118)
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	24%	17%	36% ▲	19%	28%	15%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	23%	23%	34% ▲	15% ▼	30%	16%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	22%	16%	31% ▲	17%	36% ▲	17%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	21%	12%	32% ▲	19%	25%	10%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	18%	17%	26% ▲	14%	23%	13%

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

Base: all auto/RV tourers (n=1,108). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply.

"Not sure" (1%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – MARKET

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

More than half of past-five-year visitors (57%) took their most recent Northern Ontario auto/RV touring trip in summer, followed by spring (21%), fall (14%) and winter (8%).

Ontario visitors are more likely than other markets to have travelled in summer (73%).

U.S. Fly visitors are more likely to have travelled in winter (23%) and less likely to have travelled in summer (35%).

Season	Overall (n=563)	Ontario (n=93)	Rest of Canada (n=110)	U.S. Drive (n=290)	U.S. Fly (n=70)
Winter (December – February)	8%	6%	1%	8%	23% ▲
Spring (March – May)	21%	10%	14%	25%	30%
Summer (June – August)	57%	73% ▲	69%	53%	35% ▼
Fall (September – November)	14%	11%	16%	14%	13%

▲ / ▼ 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). P3 Thinking about your most recent Northern Ontario trip that involved auto/RV touring, in what season did that trip take place? "Not sure" (<1%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – TRAVELLER TYPE

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

Summer is the most common season for the most recent trip in every traveller type, from 50% among younger families to 70% among partners.

Younger families are the most likely to have travelled in winter (13%).

Season	Overall (n=563)	Partners (n=73)	Younger Families (n=218)	Older Families (n=159)	Younger Friends (n=42)	Older Friends (n=47)
Winter (December – February)	8%	<1%	13%	7%	8%	3%
Spring (March – May)	21%	17%	24%	18%	19%	14%
Summer (June – August)	57%	70%	50%	60%	55%	67%
Fall (September – November)	14%	12%	14%	14%	15%	15%

▲ / ▼ 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). P3 Thinking about your most recent Northern Ontario trip that involved auto/RV touring, in what season did that trip take place? "Not sure" (<1%) not shown.

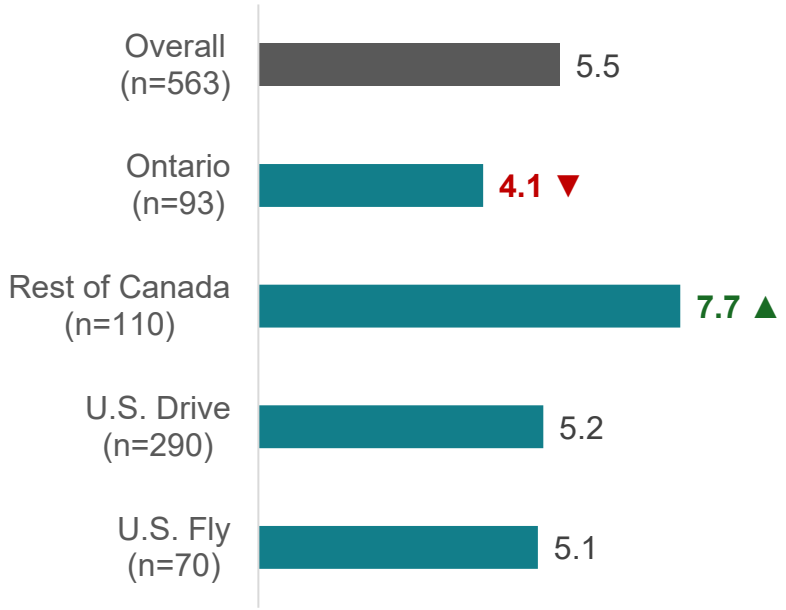
LENGTH OF MOST RECENT NORTHERN ONTARIO TRIP

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

The most recent Northern Ontario auto/RV touring trip lasted an average of 5.5 nights.

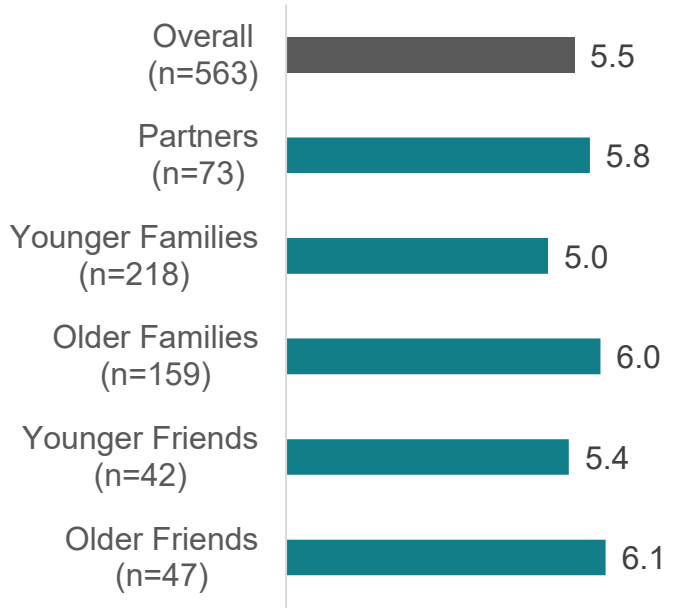
Rest of Canada visitors took longer trips than other markets (7.7 nights), while Ontario visitors took shorter trips (4.1 nights). Among traveller types, trip length ranges from 5.0 nights among younger families to 6.1 nights among older friend groups.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ 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). P4 (AVG) Thinking about your most recent Northern Ontario trip that involved auto/RV touring, how long was that trip (total nights away from home)? AVG = average number of nights.

ACCOMMODATION ON MOST RECENT TRIP – MARKET

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

Designated campgrounds (46%) and hotels or motels (39%) were the most common places to stay on the most recent Northern Ontario trip, followed by short-term rentals (23%).

U.S. Fly visitors are more likely than other markets to have stayed at a fly-in or remote outpost camp (17%).

U.S. Drive visitors are less likely to have stayed at the home of friends or relatives (11%).

Accommodation	Overall (n=563)	Ontario (n=93)	Rest of Canada (n=110)	U.S. Drive (n=290)	U.S. Fly (n=70)
Designated campground (private or provincial park)	46%	35%	49%	48%	46%
Hotel or motel	39%	35%	44%	38%	37%
Short-term rental (e.g., AirBnB, Vrbo)	23%	14%	12%	29%	29%
Backcountry or wilderness camping	17%	11%	12%	20%	20%
Commercial cottage or cabin rental	17%	10%	17%	17%	23%
Home of friends or relatives (unpaid)	16%	16%	24%	11% ▼	28%
Drive-in lodge or resort	15%	18%	6%	16%	23%
Private cottage (owned or borrowed)	14%	16%	10%	13%	21%
Fly-in or remote outpost camp	6%	4%	2%	5%	17% ▲
Other	1%	2%	1%	0%	0%

▲ / ▼ 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). P5 Thinking about your most recent Northern Ontario trip that involved auto/RV touring, where did you stay on that trip? Please select all that apply.

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

ACCOMMODATION ON MOST RECENT TRIP – TRAVELLER TYPE

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 have used backcountry or wilderness camping (25%).

Partners are the most likely to have stayed in a hotel or motel (52%) and the least likely to have used a designated campground (31%).

Accommodation	Overall (n=563)	Partners (n=73)	Younger Families (n=218)	Older Families (n=159)	Younger Friends (n=42)	Older Friends (n=47)
Designated campground (private or provincial park)	46%	31%	51%	48%	40%	42%
Hotel or motel	39%	52%	42%	29%	44%	40%
Short-term rental (e.g., AirBnB, Vrbo)	23%	17%	30%	18%	23%	14%
Backcountry or wilderness camping	17%	9%	25% ▲	11%	30%	11%
Commercial cottage or cabin rental	17%	7%	17%	17%	20%	26%
Home of friends or relatives (unpaid)	16%	18%	18%	12%	18%	26%
Drive-in lodge or resort	15%	5%	18%	14%	19%	12%
Private cottage (owned or borrowed)	14%	10%	18%	13%	16%	8%
Fly-in or remote outpost camp	6%	<1%	10%	5%	6%	0%
Other	1%	0%	0%	1%	0%	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). P5 Thinking about your most recent Northern Ontario trip that involved auto/RV touring, where did you stay on that trip? Please select all that apply.

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

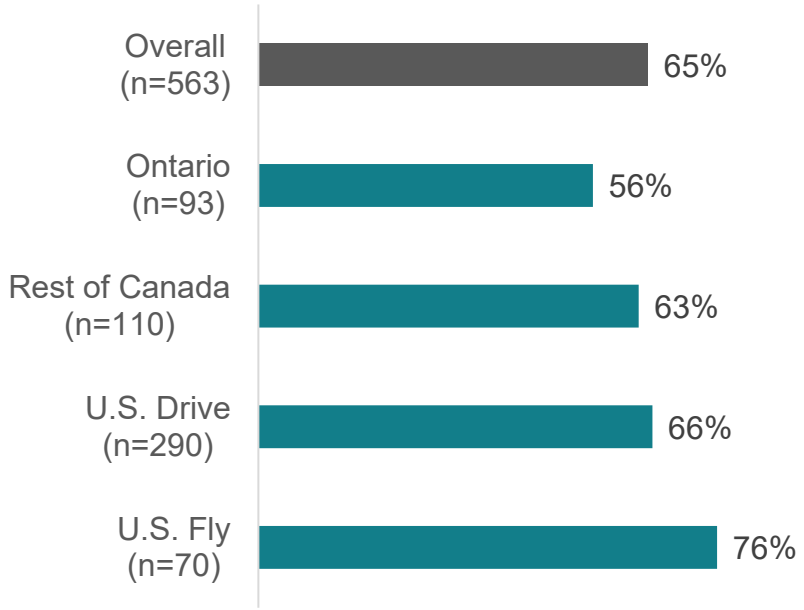
HIGH-YIELD VISITORS

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

Two-thirds of past-five-year visitors (65%) stayed in paid roofed lodging on their most recent Northern Ontario trip, making them high-yield visitors.

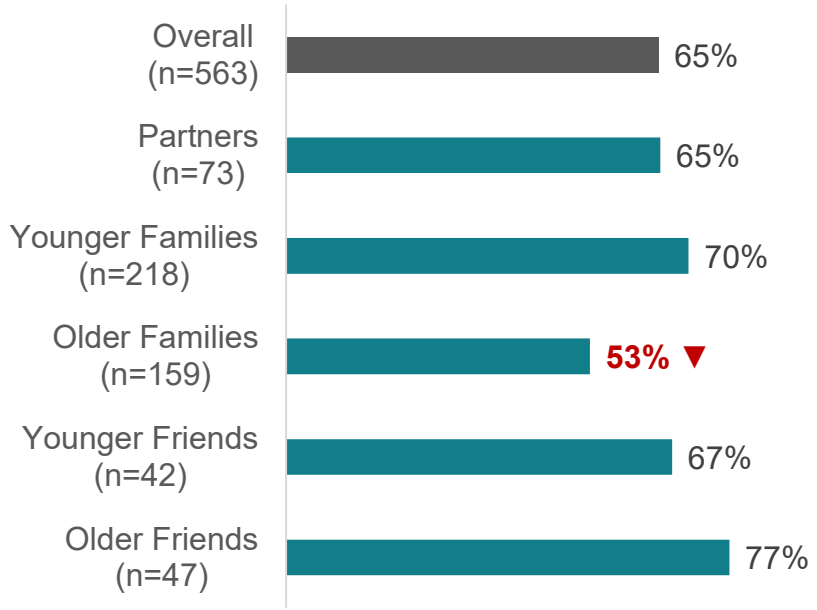
High-yield stays range from 56% among Ontario visitors to 76% among U.S. Fly visitors. Older families are less likely than other traveller types to be high-yield visitors (53%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ 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). P5_HY Thinking about your most recent Northern Ontario trip that involved auto/RV touring, where did you stay on that trip? High-yield = stayed in a drive-in lodge or resort, fly-in or remote outpost camp, commercial cottage or cabin rental, hotel or motel, or short-term rental (P5 codes 1–5).

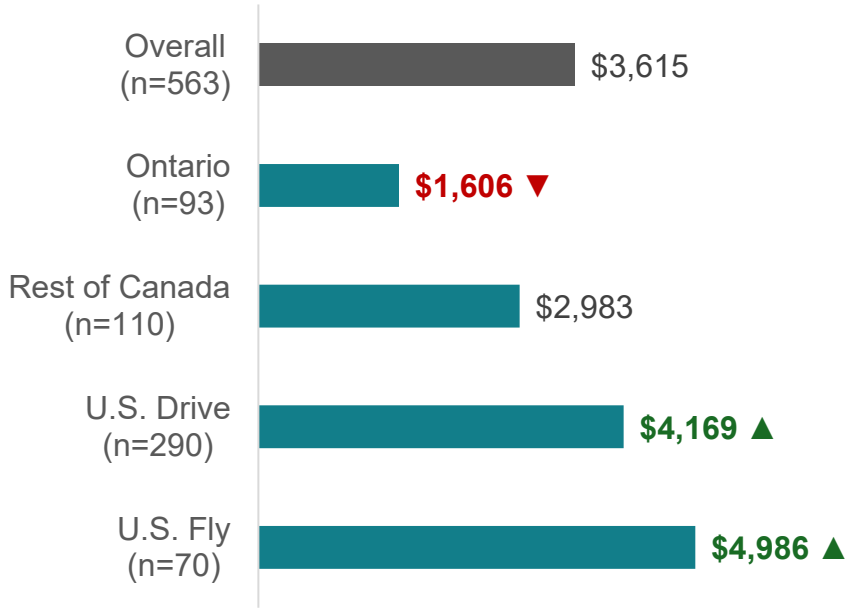
TRAVEL PARTY SPEND ON MOST RECENT NORTHERN ONTARIO TRIP

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

Travel parties spent an average of $3,615 on their most recent Northern Ontario auto/RV touring trip.

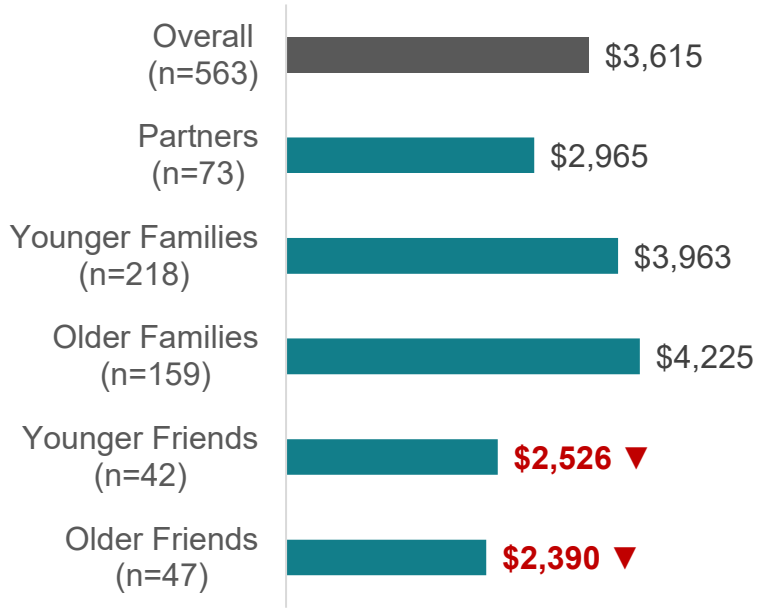
Spending is higher among U.S. Fly ($4,986) and U.S. Drive ($4,169) visitors and lower among Ontario visitors ($1,606). Younger friend groups ($2,526) and older friend groups ($2,390) spent less than other traveller types.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ 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). P6 (CAD) Approximately how much did your travel party spend in total on that Northern Ontario trip? Average total travel party spend in Canadian dollars; U.S. responses converted at 1.37.

SERVICES USED ON MOST RECENT TRIP – MARKET

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

Close to four in ten past-five-year visitors used equipment or gear rental (38%) or a packaged experience (36%) on their most recent trip, and about a third used a local outfitter or guide service (32%). The remaining 38% used none of these.

U.S. Fly visitors are more likely than other markets to have used each service, and U.S. Drive visitors are more likely to have used gear rental (45%), packaged experiences (42%) and outfitters or guides (37%).

Ontario and Rest of Canada visitors are less likely to have used equipment or gear rental (26% and 23%) or packaged experiences (22% and 15%), and more likely to have used none of these (55% and 63%).

Service	Overall (n=563)	Ontario (n=93)	Rest of Canada (n=110)	U.S. Drive (n=290)	U.S. Fly (n=70)
Equipment or gear rental	38%	26% ▼	23% ▼	45% ▲	51% ▲
Packaged experience (e.g., guided auto/RV touring package with accommodation, American Plan)	36%	22% ▼	15% ▼	42% ▲	59% ▲
Local outfitter or guide service	32%	26%	13% ▼	37% ▲	48% ▲
Charter or float plane	8%	5%	2%	10%	16% ▲
None of the above	38%	55% ▲	63% ▲	30% ▼	9% ▼

▲ / ▼ 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). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

SERVICES USED ON MOST RECENT TRIP – TRAVELLER TYPE

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

Younger families and younger friend groups are more likely than other traveller types to have used equipment or gear rental (46% and 60%) and packaged experiences (49% and 54%).

Partners are less likely to have used equipment or gear rental (16%) or packaged experiences (9%), and older friend groups packaged experiences (6%) or outfitters and guides (6%). Both are more likely to have used none of these services (67% and 72%).

Service	Overall (n=563)	Partners (n=73)	Younger Families (n=218)	Older Families (n=159)	Younger Friends (n=42)	Older Friends (n=47)
Equipment or gear rental	38%	16% ▼	46% ▲	38%	60% ▲	22%
Packaged experience (e.g., guided auto/RV touring package with accommodation, American Plan)	36%	9% ▼	49% ▲	34%	54% ▲	6% ▼
Local outfitter or guide service	32%	22%	36%	38%	36%	6% ▼
Charter or float plane	8%	6%	11%	9%	8%	3%
None of the above	38%	67% ▲	27% ▼	33%	13% ▼	72% ▲

▲ / ▼ 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). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – MARKET

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

For most past-five-year visitors, Northern Ontario was the primary and only destination (42%) or the main destination with brief stops elsewhere (43%) of their most recent trip.

Ontario visitors are the most likely to say it was their primary and only destination (55%).

Role of Northern Ontario	Overall (n=563)	Ontario (n=93)	Rest of Canada (n=110)	U.S. Drive (n=290)	U.S. Fly (n=70)
Northern Ontario was our primary and only destination	42%	55%	29%	41%	46%
Northern Ontario was the main destination, with brief stops elsewhere	43%	28%	41%	48%	41%
Northern Ontario was one of several equal destinations on the trip	11%	12%	16%	8%	12%
Northern Ontario was a secondary stop on a trip focused elsewhere	4%	3%	10%	2%	1%

▲ / ▼ 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). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (1%) not shown.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – TRAVELLER TYPE

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

Older friend groups are more likely than other traveller types to say Northern Ontario was a secondary stop on a trip focused elsewhere (20%).

Partners are the most likely to say it was one of several equal destinations (21%).

Role of Northern Ontario	Overall (n=563)	Partners (n=73)	Younger Families (n=218)	Older Families (n=159)	Younger Friends (n=42)	Older Friends (n=47)
Northern Ontario was our primary and only destination	42%	36%	47%	47%	35%	23%
Northern Ontario was the main destination, with brief stops elsewhere	43%	33%	41%	45%	50%	48%
Northern Ontario was one of several equal destinations on the trip	11%	21%	10%	7%	11%	3%
Northern Ontario was a secondary stop on a trip focused elsewhere	4%	9%	1%	0%	4%	20% ▲

▲ / ▼ 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). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (1%) not shown.

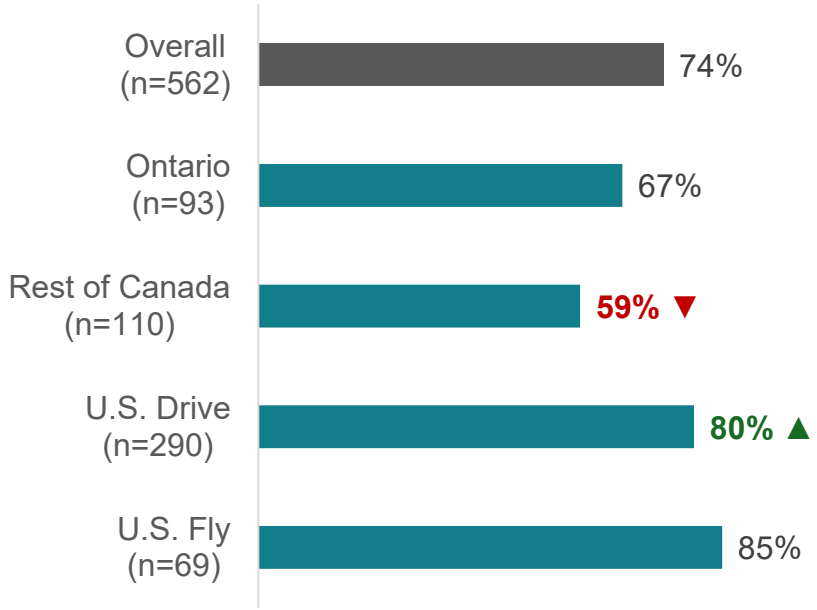
RATING OF MOST RECENT NORTHERN ONTARIO EXPERIENCE

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

Three-quarters of past-five-year visitors (74%) rate their most recent Northern Ontario auto/RV touring experience as somewhat or much better than trips taken elsewhere, including 41% who rate it much better.

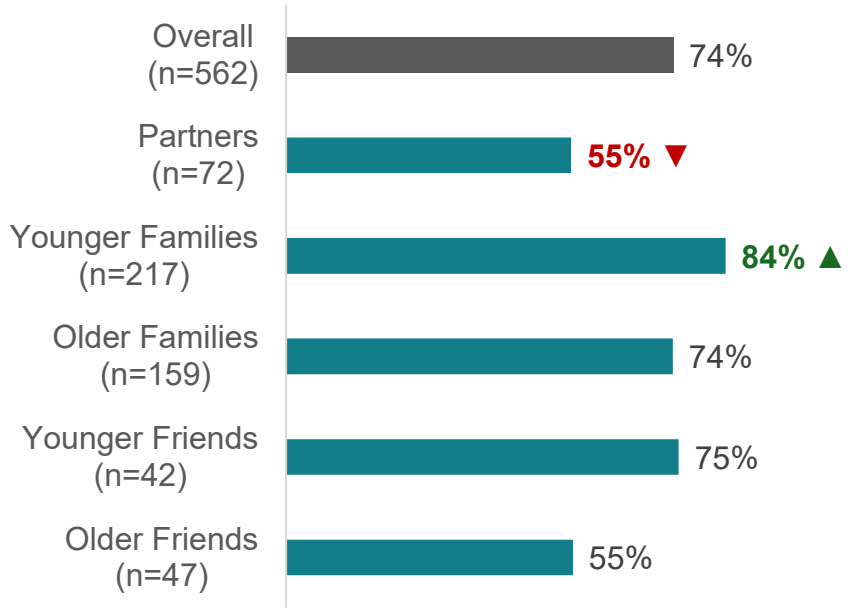
Ratings are higher among U.S. Drive visitors (80%) and lower among Rest of Canada visitors (59%). Younger families rate it higher than other traveller types (84%), while partners rate it lower (55%).

MARKET



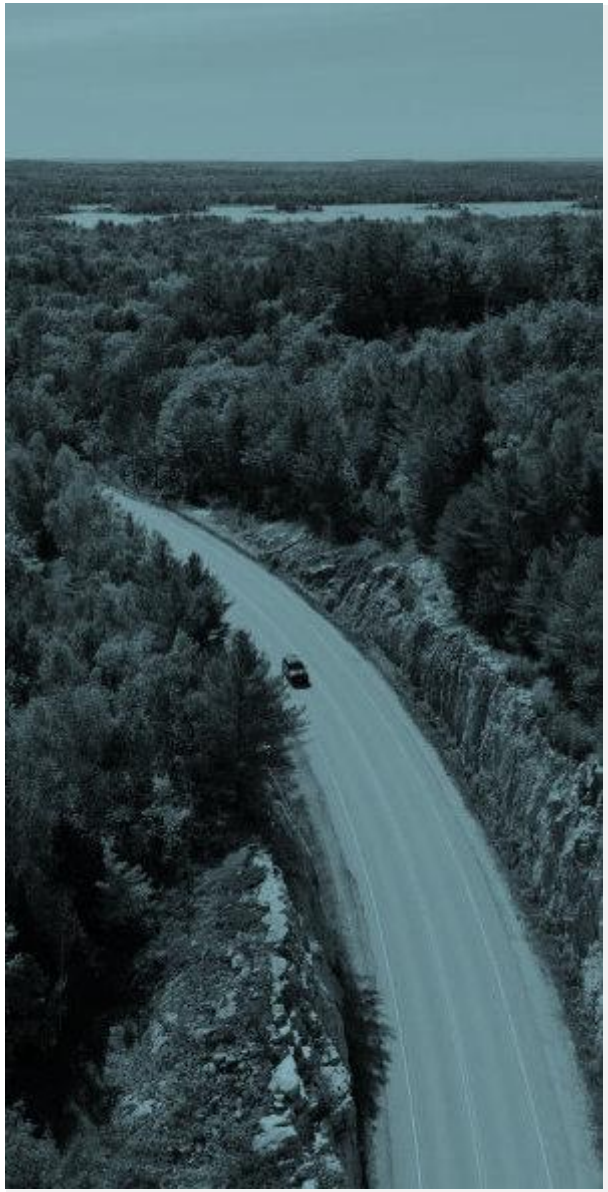
▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ 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, excluding “Don’t know” (n=562). P8 (TOP2)
Compared to auto/RV touring trips you have taken elsewhere, how would you rate your most recent Northern Ontario experience overall? TOP2 = % somewhat or much better.



PAST VISITORS VS. OVERALL

PAST VISITORS: AUTO/RV TOURING AS PART OF IDENTITY – MARKET

All auto/RV tourers

Nearly nine in ten past visitors (87%) agree that auto/RV touring and vehicle culture is a central part of who they are, compared with 79% of auto/RV tourers overall.

Agreement is higher among visitors in Rest of Canada (88% vs. 73%), U.S. Drive (88% vs. 81%) and U.S. Fly (94% vs. 86%). Ontario visitors are similar to their market overall (76% vs. 72%).

Response	Overall (n=1,107 / 562)	Ontario (n=112 / 92)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
TOP2: Somewhat agree + Strongly agree	79%	72%	73%	81%	86%
	87% ▲	76%	88% ▲	88% ▲	94% ▲

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,107; past visitors n=562). 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."

PAST VISITORS: AUTO/RV TOURING AS PART OF IDENTITY – TRAVELLER TYPE

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

Younger family visitors agree more than younger families overall that auto/RV touring is a central part of who they are (93% vs. 88%).

Visitors in the other traveller types are similar to their group overall, ranging from 79% among older family visitors to 92% among younger friend group visitors.

Response	Overall (n=1,107 / 562)	Partners (n=176 / 73)	Younger Families (n=316 / 217)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
TOP2: Somewhat agree + Strongly agree	79%	75%	88%	74%	76%	79%
	87% ▲	84%	93% ▲	79%	92%	85%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,107; past visitors n=562). 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."

PAST VISITORS: LIKELIHOOD TO RECOMMEND (NPS) – MARKET

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

Past visitors give Northern Ontario an NPS of 46, well above the 26 among all auto/RV tourers who know the region.

Visitors are more positive than their market overall in Rest of Canada (16 vs. -6), U.S. Drive (56 vs. 35) and U.S. Fly (65 vs. 44). Ontario visitors and the Ontario market overall are similar (32 vs. 25).

Measure	Overall (n=831 / 535)	Ontario (n=100 / 86)	Rest of Canada (n=186 / 104)	U.S. Drive (n=434 / 276)	U.S. Fly (n=111 / 69)
NPS score	26	25	-6	35	44
	46 ▲	32	16 ▲	56 ▲	65 ▲

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who know a lot or a little about Northern Ontario (n=831; past visitors n=535). 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).

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

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

Visitors give Northern Ontario a higher NPS than their traveller type overall among partners (21 vs. 1), younger families (54 vs. 40) and older families (56 vs. 30).

Visitor NPS is also higher among younger friend groups (37 vs. 18) and older friend groups (19 vs. 7), but these differences are not significant.

Measure	Overall (n=831 / 535)	Partners (n=126 / 71)	Younger Families (n=273 / 211)	Older Families (n=257 / 148)	Younger Friends (n=57 / 42)	Older Friends (n=79 / 41)
NPS score	26	1	40	30	18	7
	46 ▲	21 ▲	54 ▲	56 ▲	37	19

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who know a lot or a little about Northern Ontario (n=831; past visitors n=535). 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).

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

All auto/RV tourers

Nine in ten past visitors (90%) are likely to visit Northern Ontario for auto/RV touring in the next two years, compared with 68% of auto/RV tourers overall.

The gap is largest among Rest of Canada tourers (76% vs. 48%), and visitors are also more likely to return in U.S. Drive (93% vs. 73%) and U.S. Fly (94% vs. 72%). Ontario visitors (96%) are similar to the Ontario market overall (88%).

Response	Overall (n=1,094 / 563)	Ontario (n=110 / 93)	Rest of Canada (n=273 / 110)	U.S. Drive (n=575 / 290)	U.S. Fly (n=135 / 70)
TOP2: Somewhat likely + Very likely	68%	88%	48%	73%	72%
	90% ▲	96%	76% ▲	93% ▲	94% ▲

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,094; past visitors n=563). N4 (TOP2) How likely are you to visit Northern Ontario for an auto/RV touring trip in the next 2 years?

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

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

Past visitors are more likely than their traveller type overall to visit in the next two years among partners (76% vs. 53%), younger families (96% vs. 84%), older families (90% vs. 66%) and older friend groups (84% vs. 57%).

The difference among younger friend groups (94% vs. 75%) is not significant.

Response	Overall (n=1,094 / 563)	Partners (n=174 / 73)	Younger Families (n=316 / 218)	Older Families (n=363 / 159)	Younger Friends (n=64 / 42)	Older Friends (n=116 / 47)
TOP2: Somewhat likely + Very likely	68%	53%	84%	66%	75%	57%
	90% ▲	76% ▲	96% ▲	90% ▲	94%	84% ▲

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,094; past visitors n=563). N4 (TOP2) How likely are you to visit Northern Ontario for an auto/RV touring trip in the next 2 years?

PAST VISITORS: BARRIERS – MARKET (1 OF 7)

All auto/RV tourers

Past visitors are less likely than auto/RV tourers overall to be discouraged by cost (27% vs. 41%), unfavourable weather or season timing (32% vs. 39%) and high transportation costs (32% vs. 39%).

Wildfires, flooding and other environmental disruptions are the exception, cited by visitors (39%) as often as by auto/RV tourers overall (38%).

Cost is less of a barrier for visitors in Rest of Canada (33% vs. 57%), U.S. Drive (23% vs. 35%) and U.S. Fly (11% vs. 28%). Ontario visitors are similar to their market overall on each of these barriers.

Barrier	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Cost	41%	50%	57%	35%	28%
	27% ▼	46%	33% ▼	23% ▼	11% ▼
Unfavourable weather or season timing	39%	57%	47%	34%	31%
	32% ▼	57%	32% ▼	26% ▼	29%
High transportation costs (gas, airfare)	39%	45%	47%	36%	35%
	32% ▼	46%	33%	29% ▼	26%
Wildfires, flooding, or other environmental disruptions	38%	50%	47%	34%	29%
	39%	51%	51%	34%	24%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (2 OF 7)

All auto/RV tourers

Visitors are also less likely to be discouraged by safety concerns (28% vs. 35%), poor road, trail or water access (26% vs. 34%), poor value for money (26% vs. 33%) and expensive licensing or permit requirements (24% vs. 32%).

These differences are concentrated among U.S. tourers. U.S. Drive visitors are less likely to cite each of these barriers, and U.S. Fly visitors are less likely to cite safety (20% vs. 32%), access (16% vs. 29%) and value for money (14% vs. 23%).

Barrier	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Concerns about safety	35%	42%	42%	31%	32%
	28% ▼	43%	30%	24% ▼	20% ▼
Poor road, trail, or water access	34%	40%	41%	32%	29%
	26% ▼	37%	31%	22% ▼	16% ▼
Poor value for money	33%	34%	51%	27%	23%
	26% ▼	38%	43%	19% ▼	14% ▼
Expensive licensing, registration, or permit requirements	32%	24%	35%	34%	26%
	24% ▼	27%	27%	24% ▼	18%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

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

PAST VISITORS: BARRIERS – MARKET (3 OF 7)

All auto/RV tourers

Lack of amenities (21% vs. 28%), complicated licensing or permit requirements (22% vs. 28%), limited accommodation (23% vs. 27%) and poor connectivity (22% vs. 27%) are all less of a concern for past visitors than for auto/RV tourers overall.

U.S. Drive visitors are less likely than their market overall to cite lack of amenities (17% vs. 24%) and complicated licensing (19% vs. 26%). Differences in the other markets are not significant.

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

Barrier	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Lack of amenities or services at the destination	28%	30%	35%	24%	27%
	21% ▼	28%	25%	17% ▼	22%
Complicated licensing, registration, or permit requirements	28%	17%	33%	26%	33%
	22% ▼	20%	29%	19% ▼	24%
Limited accommodation options	27%	30%	34%	24%	22%
	23% ▼	28%	27%	20%	20%
Poor or unreliable cell phone or internet connectivity	27%	39%	23%	25%	32%
	22% ▼	38%	14%	20%	23%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (4 OF 7)

All auto/RV tourers

Past visitors are less likely to be discouraged by unfamiliar or unclear regulations (17% vs. 24%), distance (17% vs. 23%) and the availability of campsites or RV sites (17% vs. 22%). Insects are cited equally by visitors and auto/RV tourers overall (25%).

Rest of Canada visitors are much less likely than their market overall to say Northern Ontario is too far to drive (9% vs. 24%). U.S. Drive visitors are less likely to cite each of these three barriers, and U.S. Fly visitors unclear regulations (17% vs. 26%).

Barrier	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Insects (e.g., blackflies, mosquitoes)	25%	37%	26%	24%	20%
	25%	39%	17%	24%	19%
Unfamiliar or unclear regulations	24%	19%	25%	25%	26%
	17% ▼	22%	18%	15% ▼	17% ▼
Too far to drive	23%	30%	24%	22%	21%
	17% ▼	30%	9% ▼	17% ▼	14%
Availability of campsites or RV sites	22%	12%	29%	20%	23%
	17% ▼	13%	24%	15% ▼	18%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (5 OF 7)

All auto/RV tourers

Visitors are less likely to say Northern Ontario is too remote or rugged for their comfort level (13% vs. 18%) or that reliable trip planning information is hard to find (15% vs. 18%). Limited RV hookup availability is cited equally (21%).

Among U.S. Drive tourers, visitors are less likely to cite either remoteness (10% vs. 15%) or planning information (10% vs. 16%).

Barrier	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Limited RV hookup availability	21%	21%	20%	22%	19%
	21%	24%	21%	20%	20%
Too remote or rugged for my comfort level	18%	24%	25%	15%	16%
	13% ▼	20%	15%	10% ▼	12%
Difficulty finding reliable trip planning information	18%	15%	25%	16%	19%
	15% ▼	15%	22%	10% ▼	21%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (6 OF 7)

All auto/RV tourers

Past visitors are less likely to be concerned about vehicle registration or insurance requirements across jurisdictions (13% vs. 18%).

Among U.S. tourers, visitors cite anti-American sentiment (22% of U.S. Drive and 25% of U.S. Fly visitors) and border-crossing concerns (14% and 20%) less often than their markets overall (28% to 30% and 25% to 28%). Significance is not shown for these U.S.-only items.

U.S. Drive visitors are less likely to cite vehicle registration or insurance requirements (13% vs. 19%).

Barrier	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Anti-American sentiment	18%	–	–	28%	30%
	14%	–	–	22%	25%
Vehicle registration or insurance requirements across jurisdictions	18%	10%	20%	19%	18%
	13% ▼	11%	15%	13% ▼	15%
Concerns about crossing the Canada-US border	17%	–	–	25%	28%
	10%	–	–	14%	20%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (7 OF 7)

All auto/RV tourers

Few past visitors say they do not know enough about Northern Ontario's auto/RV touring opportunities (4% vs. 16% of auto/RV tourers overall).

This holds in Rest of Canada (5% vs. 20%), U.S. Drive (3% vs. 17%) and U.S. Fly (3% vs. 13%). Few visitors cite lack of secure storage (9%) or doubts about touring quality (5%).

Barrier	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
I do not know enough about Northern Ontario's auto/RV touring opportunities	16%	9%	20%	17%	13%
	4% ▼	4%	5% ▼	3% ▼	3% ▼
Lack of secure equipment or vehicle storage	11%	11%	9%	11%	17%
	9%	10%	6%	9%	14%
Not sure the auto/RV touring quality would meet my expectations	6%	9%	4%	7%	9%
	5%	8%	4%	5%	7%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (1 OF 7)

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

Past visitors are less likely than auto/RV tourers overall to be discouraged by cost (27% vs. 41%), unfavourable weather or season timing (32% vs. 39%) and high transportation costs (32% vs. 39%).

Younger family visitors are less likely than younger families overall to cite each of these three barriers, and older family visitors are less likely to cite cost (32% vs. 47%).

Older friend group visitors are the most concerned about wildfires and other environmental disruptions (76%), although the difference from the group overall (65%) is not significant.

Barrier	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Cost	41%	50%	29%	47%	40%	39%
	27% ▼	40%	20% ▼	32% ▼	24%	28%
Unfavourable weather or season timing	39%	43%	32%	39%	35%	53%
	32% ▼	45%	26% ▼	35%	26%	43%
High transportation costs (gas, airfare)	39%	46%	32%	41%	24%	47%
	32% ▼	44%	27% ▼	34%	21%	42%
Wildfires, flooding, or other environmental disruptions	38%	44%	33%	34%	23%	65%
	39%	43%	33%	39%	23%	76%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (2 OF 7)

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

Safety concerns, poor access, poor value for money and expensive licensing requirements are each cited by fewer past visitors (24% to 28%) than auto/RV tourers overall (32% to 35%).

Younger family visitors are less likely than younger families overall to cite each of these four barriers, and older family visitors are less likely to cite safety (24% vs. 33%) and poor value for money (21% vs. 30%).

Barrier	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Concerns about safety	35%	39%	27%	33%	23%	57%
	28% ▼	38%	23% ▼	24% ▼	27%	58%
Poor road, trail, or water access	34%	45%	26%	31%	32%	47%
	26% ▼	44%	18% ▼	25%	25%	37%
Poor value for money	33%	39%	27%	30%	27%	61%
	26% ▼	36%	20% ▼	21% ▼	25%	67%
Expensive licensing, registration, or permit requirements	32%	36%	24%	33%	23%	50%
	24% ▼	23%	18% ▼	27%	22%	43%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

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

PAST VISITORS: BARRIERS – TRAVELLER TYPE (3 OF 7)

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

Lack of amenities, complicated licensing, limited accommodation and poor connectivity are each cited by fewer past visitors (21% to 23%) than auto/RV tourers overall (27% to 28%).

Younger family visitors are less likely than younger families overall to cite lack of amenities (18% vs. 22%), complicated licensing (17% vs. 23%) and poor connectivity (22% vs. 26%), and older family visitors lack of amenities (18% vs. 27%).

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

Barrier	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Lack of amenities or services at the destination	28%	26%	22%	27%	24%	46%
	21% ▼	25%	18% ▼	18% ▼	19%	42%
Complicated licensing, registration, or permit requirements	28%	30%	23%	24%	17%	48%
	22% ▼	21%	17% ▼	24%	17%	42%
Limited accommodation options	27%	29%	23%	26%	19%	43%
	23% ▼	28%	21%	19%	20%	40%
Poor or unreliable cell phone or internet connectivity	27%	28%	26%	24%	19%	33%
	22% ▼	30%	22% ▼	21%	22%	19%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (4 OF 7)

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

Past visitors are less likely to cite unfamiliar or unclear regulations (17% vs. 24%), distance (17% vs. 23%) and campsite or RV site availability (17% vs. 22%), while insects are cited equally (25%).

Younger family visitors are less likely than younger families overall to cite unclear regulations (19% vs. 25%) and distance (15% vs. 19%).

Barrier	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Insects (e.g., blackflies, mosquitoes)	25%	24%	26%	24%	16%	25%
	25%	29%	26%	25%	17%	20%
Unfamiliar or unclear regulations	24%	31%	25%	21%	14%	27%
	17% ▼	21%	19% ▼	16%	13%	17%
Too far to drive	23%	28%	19%	25%	23%	16%
	17% ▼	19%	15% ▼	17%	20%	17%
Availability of campsites or RV sites	22%	24%	20%	20%	18%	33%
	17% ▼	13%	18%	13%	16%	32%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (5 OF 7)

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

Visitors are less likely to find Northern Ontario too remote or rugged (13% vs. 18%) or to have difficulty finding reliable planning information (15% vs. 18%).

Younger family visitors are less likely than younger families overall to cite either barrier (10% vs. 14% and 15% vs. 19%).

Barrier	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Limited RV hookup availability	21%	20%	24%	19%	11%	33%
	21%	12%	26%	18%	9%	34%
Too remote or rugged for my comfort level	18%	25%	14%	15%	13%	27%
	13% ▼	20%	10% ▼	14%	17%	11%
Difficulty finding reliable trip planning information	18%	13%	19%	17%	15%	26%
	15% ▼	14%	15% ▼	14%	13%	18%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (6 OF 7)

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

Past visitors are less likely to be concerned about vehicle registration or insurance requirements across jurisdictions (13% vs. 18%).

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

Barrier	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Anti-American sentiment	18%	31%	13%	16%	9%	25%
	14%	23%	14%	11%	13%	11%
Vehicle registration or insurance requirements across jurisdictions	18%	23%	14%	15%	11%	32%
	13% ▼	14%	12%	12%	8%	26%
Concerns about crossing the Canada-US border	17%	22%	13%	18%	9%	17%
	10%	8%	11%	11%	9%	5%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (7 OF 7)

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

Few past visitors say they do not know enough about Northern Ontario's auto/RV touring opportunities (4% vs. 16% of auto/RV tourers overall).

This is lower among visitors than the group overall for partners (9% vs. 24%), younger families (4% vs. 9%), older families (2% vs. 19%) and older friend groups (0% vs. 22%).

Barrier	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
I do not know enough about Northern Ontario's auto/RV touring opportunities	16%	24%	9%	19%	11%	22%
	4% ▼	9% ▼	4% ▼	2% ▼	6%	0% ▼
Lack of secure equipment or vehicle storage	11%	11%	14%	8%	11%	20%
	9%	9%	12%	7%	10%	10%
Not sure the auto/RV touring quality would meet my expectations	6%	9%	7%	4%	7%	5%
	5%	8%	7%	1%	10%	3%

All auto/RV tourers (overall) | Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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); significance is not shown for these items.

PAST VISITORS: INDEPENDENT VS. GUIDED TOURING – MARKET

All auto/RV tourers

Past visitors are more likely than auto/RV tourers overall to use a mix of guided and self-guided experiences (43% vs. 31%) and less likely to go fully self-guided (53% vs. 66%).

The shift toward a mix is seen in Rest of Canada (38% vs. 19%), U.S. Drive (46% vs. 35%) and U.S. Fly (52% vs. 37%). Ontario visitors are similar to their market overall.

Approach	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
I mainly go on my own or with my own group – fully self-guided	66%	61%	80%	62%	61%
	53% ▼	58%	61% ▼	50% ▼	46% ▼
I use a mix of guided and self-guided	31%	32%	19%	35%	37%
	43% ▲	35%	38% ▲	46% ▲	52% ▲
I mainly use guided or outfitted experiences provided by operators	3%	5%	1%	3%	1%
	3%	5%	0%	3%	1%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: INDEPENDENT VS. GUIDED TOURING – TRAVELLER TYPE

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

Past visitors are more likely than their traveller type overall to use a mix of guided and self-guided experiences among partners (32% vs. 19%), younger families (45% vs. 38%) and older families (52% vs. 32%).

Each of these groups is correspondingly less likely to go fully self-guided, most notably older family visitors (43% vs. 64%).

Approach	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
I mainly go on my own or with my own group – fully self-guided	66%	79%	60%	64%	56%	70%
	53% ▼	66% ▼	53% ▼	43% ▼	49%	64%
I use a mix of guided and self-guided	31%	19%	38%	32%	40%	24%
	43% ▲	32% ▲	45% ▲	52% ▲	45%	32%
I mainly use guided or outfitted experiences provided by operators	3%	1%	2%	3%	3%	4%
	3%	2%	1%	5%	4%	0%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: USE OF CERTIFIED ROUTES OR PASSES – MARKET

All auto/RV tourers

Half of past visitors (51%) have used an established or certified touring route, trail pass network or passport program, compared with a third of auto/RV tourers overall (34%).

Use is higher among visitors in Rest of Canada (32% vs. 21%), U.S. Drive (60% vs. 37%) and U.S. Fly (64% vs. 48%). Ontario visitors are similar to their market overall (38% vs. 34%).

Response	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Yes	34%	34%	21%	37%	48%
	51% ▲	38%	32% ▲	60% ▲	64% ▲

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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?
"No" and "Not sure" not shown.

Note: The OFSC example in this question was shared across all five activities and is not specific to auto/RV touring.

PAST VISITORS: USE OF CERTIFIED ROUTES OR PASSES – TRAVELLER TYPE

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

Past visitors are more likely than their traveller type overall to have used a certified route, trail pass network or passport program among partners (35% vs. 17%), younger families (65% vs. 51%) and older families (51% vs. 33%).

Differences among younger and older friend groups are not significant.

Response	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Yes	34%	17%	51%	33%	53%	14%
	51% ▲	35% ▲	65% ▲	51% ▲	59%	21%

All auto/RV tourers (overall) | Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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?
"No" and "Not sure" not shown.

Note: The OFSC example in this question was shared across all five activities and is not specific to auto/RV touring.

PAST VISITORS: IMPORTANCE OF CERTIFICATION – MARKET

All auto/RV tourers

Nearly eight in ten past visitors (78%) say recognized certification or designation is important, compared with 65% of auto/RV tourers overall.

Importance is higher among visitors in Rest of Canada (64% vs. 50%), U.S. Drive (86% vs. 71%) and U.S. Fly (89% vs. 77%), while Ontario visitors match their market overall (60%).

Response	Overall (n=1,102 / 562)	Ontario (n=112 / 93)	Rest of Canada (n=271 / 110)	U.S. Drive (n=582 / 290)	U.S. Fly (n=136 / 70)
TOP2: Somewhat important + Very important	65%	60%	50%	71%	77%
	78% ▲	60%	64% ▲	86% ▲	89% ▲

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,102; past visitors n=562). 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)?

PAST VISITORS: IMPORTANCE OF CERTIFICATION – TRAVELLER TYPE

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

Partner (73% vs. 55%), younger family (89% vs. 81%) and older family (71% vs. 59%) visitors place more importance on certification than their traveller type overall.

Older friend group visitors place the least importance on certification of any visitor group (41%).

Response	Overall (n=1,102 / 562)	Partners (n=173 / 73)	Younger Families (n=316 / 217)	Older Families (n=369 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
TOP2: Somewhat important + Very important	65%	55%	81%	59%	85%	47%
	78% ▲	73% ▲	89% ▲	71% ▲	89%	41%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,102; past visitors n=562). 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)?

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (1 OF 5)

All auto/RV tourers

Past visitors are less likely than auto/RV tourers overall to use general internet search (52% vs. 59%) and word of mouth (49% vs. 57%) for inspiration and planning.

Among U.S. Drive tourers, visitors are less likely to use both sources (48% vs. 59% and 44% vs. 54%), and U.S. Fly visitors rely less on word of mouth (31% vs. 46%).

Use of social media content, online booking or review sites and official tourism websites is similar among visitors and auto/RV tourers overall.

Source	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
General internet search (e.g., Google, Bing)	59%	56%	62%	59%	56%
	52% ▼	58%	59%	48% ▼	50%
Word of mouth (e.g., friends or family)	57%	68%	63%	54%	46%
	49% ▼	69%	57%	44% ▼	31% ▼
Social media content (e.g., Instagram, Facebook, YouTube)	45%	54%	42%	45%	41%
	42%	55%	27%	44%	42%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	43%	37%	40%	45%	45%
	45%	36%	40%	48%	49%
Official tourism websites (e.g., national, provincial, state, regional, city)	42%	33%	44%	42%	45%
	40%	37%	46%	39%	39%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (2 OF 5)

All auto/RV tourers

Past visitors use articles, blogs or videos, AI tools, visitor centres, TV and print sources at similar rates to auto/RV tourers overall, from 24% to 35%.

U.S. Drive visitors are more likely than their market overall to use AI tools (41% vs. 33%).

Source	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Articles, blogs, or videos about travel destinations	32%	32%	31%	31%	39%
	30%	33%	27%	29%	37%
AI tools (e.g., ChatGPT, Gemini, Copilot)	32%	24%	30%	33%	41%
	35%	23%	23%	41% ▲	47%
Travel information centres or visitor centres	29%	19%	29%	32%	27%
	26%	20%	26%	28%	26%
TV shows or documentaries	28%	27%	28%	29%	26%
	25%	28%	25%	25%	21%
Magazines, travel guides or brochures	27%	14%	27%	30%	29%
	24%	15%	29%	24%	30%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (3 OF 5)

All auto/RV tourers

Use of social media influencers, forums, outfitter or lodge websites and outdoor magazines is similar among past visitors and auto/RV tourers overall (16% to 22%).

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

Source	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Social media influencers	21%	19%	14%	23%	27%
	22%	18%	15%	24%	33%
Forums or online communities	18%	20%	20%	15%	26%
	16%	21%	17%	13%	23%
Outfitter or lodge websites	17%	13%	14%	19%	22%
	19%	15%	20%	18%	29%
Outdoor or sporting magazines or publications	16%	7%	14%	18%	19%
	16%	8%	14%	19%	19%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (4 OF 5)

All auto/RV tourers

Past visitors are more likely than auto/RV tourers overall to use specialized apps such as OnX or AllTrails (19% vs. 14%).

Travel agents, consumer shows and club or association newsletters are each used by about one in ten visitors, similar to auto/RV tourers overall.

Source	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	14%	11%	13%	14%	21%
	19% ▲	13%	21%	19%	24%
Travel agents	10%	12%	3%	12%	16%
	11%	13%	1%	13%	18%
Consumer shows/exhibitions	10%	8%	12%	9%	15%
	12%	9%	11%	11%	20%
Club or association newsletters or websites	9%	8%	6%	9%	15%
	11%	9%	8%	11%	18%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (5 OF 5)

All auto/RV tourers

Past visitors are more likely to use travel-related phone lines or hotlines (13% vs. 9%).

Email newsletters (10%) and rally or event calendars (8%) are used by few visitors, similar to auto/RV tourers overall.

Source	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Travel-related phone lines or hotlines	9%	10%	6%	9%	14%
	13% ▲	12%	7%	13%	21%
Email newsletters	8%	5%	2%	10%	13%
	10%	6%	3%	11%	18%
Rally or event calendars	7%	5%	7%	8%	11%
	8%	4%	10%	7%	14%
Other	1%	0%	2%	<1%	2%
	<1%	0%	1%	0%	0%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (1 OF 5)

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

Past visitors are less likely than auto/RV tourers overall to use general internet search (52% vs. 59%) and word of mouth (49% vs. 57%).

Within each traveller type, differences between visitors and the group overall are not significant. Older friend group visitors continue to rely heavily on word of mouth (85%).

Source	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
General internet search (e.g., Google, Bing)	59%	72%	49%	60%	43%	65%
	52% ▼	72%	46%	55%	38%	52%
Word of mouth (e.g., friends or family)	57%	55%	50%	56%	43%	86%
	49% ▼	52%	46%	46%	36%	85%
Social media content (e.g., Instagram, Facebook, YouTube)	45%	39%	46%	48%	62%	38%
	42%	35%	43%	44%	60%	39%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	43%	39%	46%	46%	39%	36%
	45%	43%	49%	46%	36%	38%
Official tourism websites (e.g., national, provincial, state, regional, city)	42%	50%	41%	43%	23%	36%
	40%	45%	42%	36%	29%	42%

All auto/RV tourers (overall) | Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (2 OF 5)

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

Past visitors use articles, AI tools, visitor centres, TV and print sources at similar rates to auto/RV tourers overall.

There are no significant differences between visitors and their traveller type overall on these sources.

Source	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Articles, blogs, or videos about travel destinations	32%	26%	30%	35%	22%	44%
	30%	23%	29%	32%	22%	46%
AI tools (e.g., ChatGPT, Gemini, Copilot)	32%	28%	39%	32%	28%	32%
	35%	32%	39%	35%	36%	34%
Travel information centres or visitor centres	29%	34%	26%	30%	22%	28%
	26%	33%	27%	26%	26%	21%
TV shows or documentaries	28%	24%	25%	27%	37%	44%
	25%	19%	24%	20%	33%	45%
Magazines, travel guides or brochures	27%	34%	21%	27%	19%	43%
	24%	26%	21%	25%	21%	36%

All auto/RV tourers (overall) | Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (3 OF 5)

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

Social media influencers, forums, outfitter or lodge websites and outdoor magazines are used by similar shares of past visitors and auto/RV tourers overall.

There are no significant differences between visitors and their traveller type overall on these sources.

Source	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Social media influencers	21%	15%	29%	19%	23%	15%
	22%	16%	28%	22%	24%	12%
Forums or online communities	18%	14%	18%	19%	22%	19%
	16%	13%	18%	16%	24%	5%
Outfitter or lodge websites	17%	9%	18%	19%	15%	20%
	19%	8%	20%	21%	19%	12%
Outdoor or sporting magazines or publications	16%	14%	20%	13%	21%	20%
	16%	20%	20%	12%	18%	11%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (4 OF 5)

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

Past visitors are more likely than auto/RV tourers overall to use specialized apps (19% vs. 14%), led by younger family visitors (26%).

Differences between visitors and their traveller type overall are not significant on these sources.

Source	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	14%	11%	22%	10%	15%	9%
	19% ▲	12%	26%	17%	19%	4%
Travel agents	10%	8%	14%	9%	10%	9%
	11%	9%	15%	9%	13%	4%
Consumer shows/exhibitions	10%	4%	14%	9%	11%	13%
	12%	4%	15%	12%	12%	8%
Club or association newsletters or websites	9%	6%	11%	7%	8%	13%
	11%	3%	12%	12%	9%	7%

All auto/RV tourers (overall) | Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (5 OF 5)

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

Past visitors are more likely to use travel-related phone lines or hotlines (13% vs. 9%), and younger family visitors more so than younger families overall (21% vs. 16%).

Email newsletters and rally or event calendars are used by few visitors in any traveller type.

Source	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Travel-related phone lines or hotlines	9%	4%	16%	7%	13%	7%
	13% ▲	5%	21% ▲	9%	18%	3%
Email newsletters	8%	10%	8%	8%	8%	5%
	10%	13%	10%	11%	9%	5%
Rally or event calendars	7%	7%	8%	4%	10%	12%
	8%	12%	9%	7%	10%	3%
Other	1%	3%	0%	0%	3%	1%
	<1%	1%	0%	0%	0%	0%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (1 OF 3)

Auto/RV tourers who use social media to plan

Among auto/RV tourers who use social media to plan, past visitors are more likely to use YouTube (82% vs. 76%) and Instagram (67% vs. 61%). Facebook use is about the same (78% vs. 79%).

U.S. Fly visitors are more likely than their market overall to use Instagram (87% vs. 75%).

Platform	Overall (n=588 / 292)	Ontario (n=67 / 55)	Rest of Canada (n=132 / 37)	U.S. Drive (n=317 / 160)	U.S. Fly (n=72 / 40)
Facebook	79%	70%	81%	80%	80%
	78%	69%	81%	80%	78%
YouTube	76%	76%	68%	77%	82%
	82% ▲	78%	76%	84%	87%
Instagram	61%	62%	65%	55%	75%
	67% ▲	64%	69%	63%	87% ▲
TikTok	44%	40%	28%	49%	53%
	46%	42%	17%	51%	59%

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who use social media to plan (B4) (n=588; past visitors n=292). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (2 OF 3)

Auto/RV tourers who use social media to plan

Past visitors are also more likely to use X (30% vs. 22%) and WhatsApp (29% vs. 19%).

U.S. Fly visitors are more likely than their market overall to use both X (58% vs. 44%) and WhatsApp (49% vs. 32%), and U.S. Drive visitors to use WhatsApp (26% vs. 17%).

Platform	Overall (n=588 / 292)	Ontario (n=67 / 55)	Rest of Canada (n=132 / 37)	U.S. Drive (n=317 / 160)	U.S. Fly (n=72 / 40)
Reddit	32%	22%	29%	32%	44%
	34%	25%	30%	38%	36%
X (formerly known as Twitter)	22%	19%	3%	26%	44%
	30% ▲	19%	2%	33%	58% ▲
Pinterest	22%	17%	15%	24%	31%
	21%	18%	15%	20%	37%
WhatsApp	19%	20%	15%	17%	32%
	29% ▲	21%	31%	26% ▲	49% ▲

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who use social media to plan (B4) (n=588; past visitors n=292). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (3 OF 3)

Auto/RV tourers who use social media to plan

Snapchat (18%) and Threads (15%) are used by fewer than one in five past visitors, similar to social media users overall.

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

Platform	Overall (n=588 / 292)	Ontario (n=67 / 55)	Rest of Canada (n=132 / 37)	U.S. Drive (n=317 / 160)	U.S. Fly (n=72 / 40)
Snapchat	14%	13%	5%	15%	29%
	18%	10%	9%	17%	40%
Threads	12%	7%	9%	11%	23%
	15%	6%	14%	14%	30%
Other	<1%	2%	1%	0%	<1%
	<1%	3%	0%	0%	0%

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who use social media to plan (B4) (n=588; past visitors n=292). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (1 OF 3)

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

Among auto/RV tourers who use social media to plan, past visitors are more likely to use YouTube (82% vs. 76%) and Instagram (67% vs. 61%).

Younger family visitors are more likely than younger families overall to use both YouTube (84% vs. 78%) and Instagram (81% vs. 74%). Visitor bases for partners and friend groups are small.

Platform	Overall (n=588 / 292)	Partners* (n=76 / 28)	Younger Families (n=189 / 121)	Older Families (n=205 / 87)	Younger Friends* (n=45 / 28)	Older Friends* (n=49 / 20)
Facebook	79%	82%	79%	81%	57%	88%
	78%	88%	78%	80%	65%	93%
YouTube	76%	73%	78%	75%	71%	78%
	82% ▲	84%	84% ▲	83%	79%	81%
Instagram	61%	43%	74%	56%	79%	52%
	67% ▲	37%	81% ▲	58%	83%	36%
TikTok	44%	32%	59%	37%	43%	37%
	46%	26%	60%	40%	46%	14%

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who use social media to plan (B4) (n=588; past visitors n=292). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (2 OF 3)

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

Past visitors are more likely to use X (30% vs. 22%) and WhatsApp (29% vs. 19%).

Younger family visitors are more likely than younger families overall to use X (41% vs. 32%) and WhatsApp (35% vs. 25%).

Platform	Overall (n=588 / 292)	Partners* (n=76 / 28)	Younger Families (n=189 / 121)	Older Families (n=205 / 87)	Younger Friends* (n=45 / 28)	Older Friends* (n=49 / 20)
Reddit	32%	13%	40%	29%	41%	30%
	34%	3%	42%	31%	34%	44%
X (formerly known as Twitter)	22%	8%	32%	18%	25%	19%
	30% ▲	5%	41% ▲	25%	30%	17%
Pinterest	22%	21%	27%	22%	16%	16%
	21%	18%	30%	17%	14%	0%
WhatsApp	19%	6%	25%	19%	18%	14%
	29% ▲	9%	35% ▲	31%	20%	21%

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who use social media to plan (B4) (n=588; past visitors n=292). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (3 OF 3)

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

Snapchat and Threads are used by fewer than one in five past visitors.

Differences between visitors and their traveller type overall are not significant on these platforms.

Platform	Overall (n=588 / 292)	Partners* (n=76 / 28)	Younger Families (n=189 / 121)	Older Families (n=205 / 87)	Younger Friends* (n=45 / 28)	Older Friends* (n=49 / 20)
Snapchat	14%	3%	21%	12%	7%	19%
	18%	2%	25%	18%	8%	12%
Threads	12%	6%	15%	12%	13%	7%
	15%	9%	17%	13%	18%	12%
Other	<1%	0%	<1%	1%	1%	0%
	<1%	0%	0%	2%	0%	0%

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who use social media to plan (B4) (n=588; past visitors n=292). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – MARKET

All auto/RV tourers

Three-quarters of past visitors (75%) are likely to use AI tools to plan their next auto/RV touring trip, compared with 65% of auto/RV tourers overall.

The difference comes from U.S. tourers: U.S. Drive (82% vs. 67%) and U.S. Fly (85% vs. 74%) visitors are more likely than their markets overall to plan with AI, while Canadian visitors are similar to their markets.

Response	Overall (n=1,098 / 560)	Ontario (n=113 / 93)	Rest of Canada (n=270 / 108)	U.S. Drive (n=581 / 290)	U.S. Fly (n=134 / 70)
TOP2: Somewhat likely + Very likely	65%	61%	56%	67%	74%
	75% ▲	65%	60%	82% ▲	85% ▲

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,098; past visitors n=560). 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?

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – TRAVELLER TYPE

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

Younger family (85% vs. 78%) and older family (79% vs. 64%) visitors are more likely than their traveller type overall to use AI tools to plan their next trip.

Partner visitors remain the least likely to use AI tools (53%).

Response	Overall (n=1,098 / 560)	Partners (n=172 / 73)	Younger Families (n=313 / 215)	Older Families (n=370 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=117 / 47)
TOP2: Somewhat likely + Very likely	65%	49%	78%	64%	74%	53%
	75% ▲	53%	85% ▲	79% ▲	78%	62%

All auto/RV tourers (overall) | Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers, excluding “Don’t know” (n=1,098; past visitors n=560). 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?

PAST VISITORS: VEHICLE USED MOST OFTEN – MARKET (1 OF 2)

All auto/RV tourers

Past visitors are more likely than auto/RV tourers overall to most often use a motorhome (35% vs. 26%), while use of a car or SUV (71%) and a pickup truck (27%) is similar.

Motorhome use is higher among visitors than their market overall in Rest of Canada (31% vs. 18%), U.S. Drive (37% vs. 28%) and U.S. Fly (46% vs. 35%).

Vehicle	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Car or SUV (no trailer/RV)	66%	78%	56%	67%	72%
	71%	79%	59%	70%	81%
Pickup truck	28%	23%	24%	29%	36%
	27%	22%	16%	30%	37%
Motorhome / Class A, B, or C RV	26%	21%	18%	28%	35%
	35% ▲	23%	31% ▲	37% ▲	46% ▲

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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%.

PAST VISITORS: VEHICLE USED MOST OFTEN – MARKET (2 OF 2)

All auto/RV tourers

Travel trailers or fifth wheels (23%) and truck campers (10%) are used by similar shares of past visitors and auto/RV tourers overall.

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

Vehicle	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Travel trailer or fifth wheel	24%	13%	27%	25%	26%
	23%	14%	18%	26%	28%
Truck camper	7%	9%	2%	9%	10%
	10%	10%	1%	12%	17%
Other	1%	0%	2%	<1%	0%
	<1%	0%	2%	0%	0%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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%.

PAST VISITORS: VEHICLE USED MOST OFTEN – TRAVELLER TYPE (1 OF 2)

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

Past visitors are more likely to most often use a motorhome (35% vs. 26%).

Younger family visitors are more likely than younger families overall to use a motorhome (41% vs. 34%).

Vehicle	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Car or SUV (no trailer/RV)	66%	62%	68%	64%	67%	73%
	71%	70%	72%	65%	71%	87%
Pickup truck	28%	28%	36%	27%	21%	19%
	27%	20%	36%	25%	17%	18%
Motorhome / Class A, B, or C RV	26%	19%	34%	28%	32%	7%
	35% ▲	28%	41% ▲	36%	40%	7%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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%.

PAST VISITORS: VEHICLE USED MOST OFTEN – TRAVELLER TYPE (2 OF 2)

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

Travel trailers or fifth wheels and truck campers are used by similar shares of past visitors and auto/RV tourers overall.

Younger family visitors are slightly more likely than younger families overall to use a truck camper (13% vs. 10%).

Vehicle	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Travel trailer or fifth wheel	24%	25%	29%	23%	21%	21%
	23%	16%	27%	24%	18%	11%
Truck camper	7%	2%	10%	8%	11%	7%
	10%	4%	13% ▲	5%	11%	10%
Other	1%	2%	<1%	0%	0%	2%
	<1%	3%	0%	0%	0%	0%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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%.

PAST VISITORS: GETTING TO DESTINATIONS – MARKET

All auto/RV tourers

Past visitors are more likely than auto/RV tourers overall to get to their destinations by RV or motorhome (40% vs. 33%), by flying to a regional hub and then driving (19% vs. 14%) and by float plane or charter flight (7% vs. 5%).

U.S. Drive visitors are more likely than their market overall to travel by RV or motorhome (44% vs. 34%), while Rest of Canada visitors are less likely to use a personal vehicle (65% vs. 77%).

Mode of travel	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Personal vehicle (car, truck, SUV)	76%	82%	77%	73%	80%
	73%	82%	65% ▼	72%	81%
RV / motorhome	33%	22%	26%	34%	46%
	40% ▲	24%	36%	44% ▲	54%
Personal vehicle with trailer (e.g., boat, camper, ATV)	30%	25%	19%	34%	34%
	33%	30%	19%	38%	40%
Fly to a regional hub, then drive	14%	15%	15%	13%	18%
	19% ▲	17%	22%	16%	26%
Float plane or charter flight to a remote destination	5%	3%	2%	5%	11%
	7% ▲	3%	5%	8%	17%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). T3 How do you typically get to your auto/RV touring destinations? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: GETTING TO DESTINATIONS – TRAVELLER TYPE

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

Past visitors are more likely than auto/RV tourers overall to travel by RV or motorhome (40% vs. 33%), fly to a regional hub and drive (19% vs. 14%) or take a float plane or charter flight (7% vs. 5%).

Younger family visitors are more likely than younger families overall to use each of these three modes, including RV or motorhome (48% vs. 40%).

Mode of travel	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Personal vehicle (car, truck, SUV)	76%	78%	75%	74%	71%	84%
	73%	74%	76%	68%	68%	85%
RV / motorhome	33%	29%	40%	32%	36%	19%
	40% ▲	32%	48% ▲	41%	42%	18%
Personal vehicle with trailer (e.g., boat, camper, ATV)	30%	23%	40%	27%	31%	23%
	33%	13%	41%	34%	30%	27%
Fly to a regional hub, then drive	14%	13%	14%	13%	18%	24%
	19% ▲	14%	19% ▲	16%	25%	29%
Float plane or charter flight to a remote destination	5%	2%	9%	3%	7%	2%
	7% ▲	5%	12% ▲	4%	9%	0%

All auto/RV tourers (overall) | Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). T3 How do you typically get to your auto/RV touring destinations? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: VIEW OF A TRIP TO NORTHERN ONTARIO – MARKET

All auto/RV tourers

Nearly three-quarters of past visitors (73%) see Northern Ontario as a destination of choice for auto/RV touring, compared with 61% of auto/RV tourers overall, and fewer see it as a destination of convenience (25% vs. 33%).

U.S. Drive visitors are more likely than their market overall to see it as a destination of choice (78% vs. 65%). Rest of Canada visitors remain more likely to see it as a destination of convenience (53%).

View of a trip	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
A destination of choice – somewhere I would specifically seek out for auto/RV touring	61%	73%	39%	65%	79%
	73% ▲	78%	47%	78% ▲	84%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	33%	23%	56%	28%	17%
	25% ▼	20%	53%	19% ▼	15%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). N10 Which of the following best describes how you would view an auto/RV touring trip to Northern Ontario?
"Not sure" (6%) not shown.

PAST VISITORS: VIEW OF A TRIP TO NORTHERN ONTARIO – TRAVELLER TYPE

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

Younger family (78% vs. 69%) and older family (80% vs. 62%) visitors are more likely than their traveller type overall to see Northern Ontario as a destination of choice.

Older friend group visitors remain split, with 45% seeing it as a destination of choice and 51% as a destination of convenience.

View of a trip	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
A destination of choice – somewhere I would specifically seek out for auto/RV touring	61%	57%	69%	62%	65%	39%
	73% ▲	55%	78% ▲	80% ▲	78%	45%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	33%	35%	29%	30%	29%	51%
	25% ▼	42%	22% ▼	16% ▼	22%	51%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). N10 Which of the following best describes how you would view an auto/RV touring trip to Northern Ontario?
"Not sure" (6%) not shown.

PAST VISITORS: ROLE IN TRAVEL DECISIONS – MARKET

All auto/RV tourers

Past visitors are more likely than auto/RV tourers overall to say auto/RV touring is always the primary purpose of their trips (37% vs. 28%), and less likely to say it is often a secondary activity (12% vs. 19%).

U.S. Drive visitors show the same pattern compared with their market overall (41% vs. 30% always the primary purpose; 8% vs. 16% often secondary).

Role in travel decisions	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
It is always the primary purpose of my trips	28%	25%	21%	30%	37%
	37% ▲	29%	27%	41% ▲	45%
It is usually the primary purpose, but not always	49%	45%	49%	51%	45%
	48%	48%	53%	48%	41%
It is often a secondary activity alongside other trip purposes	19%	22%	25%	16%	16%
	12% ▼	18%	18%	8% ▼	10%
It is rarely the primary purpose of my trips	3%	8%	5%	2%	2%
	3%	5%	1%	3%	3%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). T2B Which of the following best describes the role auto/RV touring plays in your travel decisions?
"Not sure" (<1%) not shown.

PAST VISITORS: ROLE IN TRAVEL DECISIONS – TRAVELLER TYPE

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

Half of younger family visitors (50%) say auto/RV touring is always the primary purpose of their trips, compared with 41% of younger families overall.

Younger family (7% vs. 13%) and older family (10% vs. 21%) visitors are less likely than their group overall to say it is often a secondary activity.

Role in travel decisions	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
It is always the primary purpose of my trips	28%	22%	41%	25%	22%	16%
	37% ▲	28%	50% ▲	33%	26%	10%
It is usually the primary purpose, but not always	49%	54%	43%	50%	48%	54%
	48%	60%	41%	54%	51%	48%
It is often a secondary activity alongside other trip purposes	19%	19%	13%	21%	24%	26%
	12% ▼	11%	7% ▼	10% ▼	22%	34%
It is rarely the primary purpose of my trips	3%	3%	2%	3%	7%	4%
	3%	1%	2%	3%	2%	7%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). T2B Which of the following best describes the role auto/RV touring plays in your travel decisions?
"Not sure" (<1%) not shown.

PAST VISITORS: ROLE IN A FUTURE TRIP – MARKET

All auto/RV tourers

Past visitors are more likely than auto/RV tourers overall to say Northern Ontario would be the only destination of a future auto/RV touring trip (26% vs. 19%), and less likely to see it as one of several equal destinations (16% vs. 21%).

U.S. Drive visitors are more likely to make it the only destination (32% vs. 22%), and Rest of Canada visitors the primary destination with brief stops elsewhere (62% vs. 46%). U.S. Fly visitors are less likely to see it as one of several equal destinations (14% vs. 23%).

Role of Northern Ontario	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
It would be the only destination of the trip	19%	26%	10%	22%	18%
	26% ▲	27%	7%	32% ▲	26%
It would be the primary destination, with brief stops elsewhere	50%	48%	46%	50%	56%
	52%	53%	62% ▲	47%	59%
It would be one of several equal destinations	21%	18%	22%	21%	23%
	16% ▼	16%	14%	18%	14% ▼
It would be a secondary stop on a trip focused elsewhere	6%	4%	17%	3%	2%
	5%	3%	16%	2%	1%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: ROLE IN A FUTURE TRIP – TRAVELLER TYPE

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

Younger family visitors are more likely than younger families overall to make Northern Ontario the only destination of a future trip (36% vs. 29%).

Younger family (13% vs. 17%) and older family (14% vs. 22%) visitors are less likely to see it as one of several equal destinations.

Role of Northern Ontario	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
It would be the only destination of the trip	19%	9%	29%	22%	10%	7%
	26% ▲	12%	36% ▲	30%	15%	4%
It would be the primary destination, with brief stops elsewhere	50%	54%	51%	47%	56%	43%
	52%	55%	49%	54%	64%	47%
It would be one of several equal destinations	21%	23%	17%	22%	18%	27%
	16% ▼	23%	13% ▼	14% ▼	17%	21%
It would be a secondary stop on a trip focused elsewhere	6%	8%	3%	5%	12%	15%
	5%	9%	2%	3%	2%	21%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

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

All auto/RV tourers

Past visitors' lodging preferences are broadly similar to auto/RV tourers overall, led by designated campgrounds (54%) and hotels or motels (44%), although visitors are less likely to prefer drive-in lodges or resorts (39% vs. 45%).

U.S. Fly visitors are less likely than their market overall to prefer drive-in lodges or resorts (37% vs. 49%).

Lodging option	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Designated campground (private or provincial park)	58%	47%	69%	57%	51%
	54%	45%	64%	55%	47%
Hotel or motel	48%	48%	50%	46%	51%
	44%	43%	45%	44%	47%
Drive-in lodge or resort	45%	47%	35%	48%	49%
	39% ▼	48%	24%	43%	37% ▼
Short-term rental (e.g., AirBnB, Vrbo)	43%	42%	42%	44%	47%
	40%	43%	34%	41%	46%
Commercial cottage or cabin rental	39%	23%	33%	42%	53%
	35%	19%	27%	39%	49%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

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

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

All auto/RV tourers

Past visitors are more likely than auto/RV tourers overall to prefer fly-in or remote outpost camps (13% vs. 9%).

Preferences for private cottages, backcountry camping and staying with friends or relatives are similar among visitors and auto/RV tourers overall, and within each market.

Lodging option	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Private cottage (owned or borrowed)	34%	42%	33%	32%	38%
	31%	41%	26%	28%	39%
Backcountry or wilderness camping	30%	22%	25%	34%	33%
	33%	25%	25%	39%	34%
Home of friends or relatives (unpaid)	18%	26%	23%	14%	21%
	19%	27%	17%	16%	24%
Fly-in or remote outpost camp	9%	10%	7%	8%	17%
	13% ▲	11%	11%	12%	25%
Other	<1%	0%	1%	<1%	<1%
	0%	0%	0%	0%	0%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

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

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

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

Past visitors are less likely than auto/RV tourers overall to prefer drive-in lodges or resorts (39% vs. 45%); other lodging preferences are similar.

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

Lodging option	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Designated campground (private or provincial park)	58%	55%	58%	59%	47%	64%
	54%	43%	55%	55%	44%	67%
Hotel or motel	48%	52%	43%	42%	52%	67%
	44%	60%	44%	34%	51%	60%
Drive-in lodge or resort	45%	39%	41%	43%	47%	63%
	39% ▼	34%	39%	37%	40%	48%
Short-term rental (e.g., AirBnB, Vrbo)	43%	38%	43%	44%	38%	53%
	40%	39%	42%	40%	38%	48%
Commercial cottage or cabin rental	39%	36%	36%	41%	39%	49%
	35%	35%	34%	35%	34%	41%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

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

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

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

Past visitors are more likely to prefer fly-in or remote outpost camps (13% vs. 9%).

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

Lodging option	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Private cottage (owned or borrowed)	34%	26%	35%	35%	33%	37%
	31%	23%	34%	35%	24%	23%
Backcountry or wilderness camping	30%	24%	38%	28%	43%	22%
	33%	28%	38%	27%	45%	30%
Home of friends or relatives (unpaid)	18%	14%	21%	19%	31%	13%
	19%	17%	21%	21%	20%	8%
Fly-in or remote outpost camp	9%	4%	14%	9%	11%	5%
	13% ▲	11%	17%	13%	10%	5%
Other	<1%	1%	<1%	1%	2%	0%
	0%	0%	0%	0%	0%	0%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

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

PAST VISITORS: PREFERRED ACCESS – MARKET

All auto/RV tourers

Road-accessible areas remain the preference for nine in ten past visitors (89%), but visitors are more open than auto/RV tourers overall to remote boat-in (26% vs. 18%), train-in (22% vs. 18%) and fly-in or float plane access (20% vs. 15%).

U.S. Drive visitors are more likely than their market overall to prefer all three remote access types, U.S. Fly visitors boat-in (44% vs. 33%) and fly-in access (42% vs. 31%), and Rest of Canada visitors boat-in access (22% vs. 12%).

Access type	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Road-accessible areas	90%	95%	94%	88%	90%
	89%	95%	96%	85%	88%
Remote boat-in access	18%	13%	12%	19%	33%
	26% ▲	15%	22% ▲	28% ▲	44% ▲
Train-in access	18%	16%	11%	18%	35%
	22% ▲	16%	17%	24% ▲	35%
Fly-in or float plane access	15%	9%	8%	15%	31%
	20% ▲	11%	14%	20% ▲	42% ▲

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: PREFERRED ACCESS – TRAVELLER TYPE

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

Older family visitors are more likely than older families overall to prefer each of the remote access types, including boat-in (23% vs. 15%) and fly-in or float plane access (22% vs. 14%).

Younger family visitors are more likely to prefer boat-in (34% vs. 28%) and fly-in access (26% vs. 22%), and partner visitors boat-in access (20% vs. 9%).

Access type	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Road-accessible areas	90%	93%	89%	90%	87%	94%
	89%	95%	89%	90%	85%	85%
Remote boat-in access	18%	9%	28%	15%	20%	15%
	26% ▲	20% ▲	34% ▲	23% ▲	20%	20%
Train-in access	18%	14%	20%	16%	25%	25%
	22% ▲	14%	23%	23% ▲	31%	25%
Fly-in or float plane access	15%	10%	22%	14%	24%	5%
	20% ▲	13%	26% ▲	22% ▲	22%	5%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (1 OF 3)

All auto/RV tourers

Past visitors are less likely than auto/RV tourers overall to say Northern Lights or dark sky viewing (55% vs. 62%), scenic driving (50% vs. 60%) or wildlife viewing (37% vs. 43%) would enhance their trip.

U.S. Drive visitors are less interested than their market overall in Northern Lights viewing (53% vs. 62%) and scenic driving (48% vs. 61%), and U.S. Fly visitors in scenic driving (43% vs. 55%). Ontario visitors are similar to their market overall.

Additional experience	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Northern Lights or dark sky viewing experiences	62%	62%	64%	62%	59%
	55% ▼	63%	58%	53% ▼	50%
Scenic driving or road trip components	60%	67%	58%	61%	55%
	50% ▼	68%	43%	48% ▼	43% ▼
Culinary experiences featuring locally sourced or freshly caught / harvested food	44%	39%	49%	43%	47%
	42%	42%	41%	42%	46%
Wildlife viewing separate from auto/RV touring	43%	36%	35%	47%	51%
	37% ▼	38%	21%	43%	41%
Multi-stop regional itineraries combining several Northern Ontario areas	33%	29%	35%	32%	35%
	35%	28%	41%	35%	35%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (2 OF 3)

All auto/RV tourers

Interest in wellness experiences, all-inclusive packages, photography experiences, multi-activity packages and Indigenous-led experiences is similar among past visitors and auto/RV tourers overall (26% to 32%).

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

Additional experience	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	32%	24%	38%	30%	36%
	32%	23%	40%	30%	40%
All-inclusive lodge or touring packages	30%	39%	20%	32%	37%
	30%	37%	21%	29%	41%
Photography or nature interpretation guided experiences	30%	25%	19%	34%	36%
	29%	27%	19%	33%	34%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	26%	26%	23%	26%	36%
	27%	25%	18%	29%	38%
Indigenous-led cultural or land-based experiences	25%	17%	16%	29%	30%
	26%	19%	14%	32%	31%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

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

All auto/RV tourers

Past visitors are more likely than auto/RV tourers overall to be interested in auto/RV touring rallies, races or club events (18% vs. 13%).

U.S. Drive visitors are more interested than their market overall in rallies and club events (20% vs. 14%) and in learning and interpretation opportunities (30% vs. 23%).

Additional experience	Overall (n=1,108 / 563)	Ontario (n=113 / 93)	Rest of Canada (n=276 / 110)	U.S. Drive (n=583 / 290)	U.S. Fly (n=136 / 70)
Learning and interpretation opportunities	22%	18%	19%	23%	30%
	26%	18%	18%	30% ▲	32%
Youth or family-oriented introduction-to-auto/RV touring programs	16%	17%	14%	16%	23%
	19%	18%	12%	20%	31%
Auto/RV touring rallies, races, or club events	13%	14%	9%	14%	18%
	18% ▲	14%	12%	20% ▲	24%
None – I prefer to focus entirely on auto/RV touring	3%	2%	4%	2%	4%
	3%	3%	6%	2%	1%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (1 OF 3)

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

Past visitors are less likely than auto/RV tourers overall to be drawn by Northern Lights viewing, scenic driving or wildlife viewing.

Younger family visitors are less interested than younger families overall in Northern Lights viewing (50% vs. 56%) and scenic driving (42% vs. 48%), and older family visitors in scenic driving (55% vs. 67%). Partner visitors are more interested in multi-stop regional itineraries (47% vs. 30%).

Additional experience	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Northern Lights or dark sky viewing experiences	62%	64%	56%	62%	50%	80%
	55% ▼	64%	50% ▼	54%	50%	76%
Scenic driving or road trip components	60%	66%	48%	67%	46%	67%
	50% ▼	55%	42% ▼	55% ▼	47%	65%
Culinary experiences featuring locally sourced or freshly caught / harvested food	44%	52%	43%	42%	38%	49%
	42%	50%	41%	44%	30%	42%
Wildlife viewing separate from auto/RV touring	43%	46%	45%	41%	44%	40%
	37% ▼	35%	41%	38%	37%	32%
Multi-stop regional itineraries combining several Northern Ontario areas	33%	30%	33%	34%	28%	39%
	35%	47% ▲	35%	31%	25%	36%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (2 OF 3)

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

Interest in wellness, all-inclusive packages, photography, multi-activity packages and Indigenous-led experiences is similar among past visitors and auto/RV tourers overall.

There are no significant differences between visitors and their traveller type overall on these experiences.

Additional experience	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	32%	26%	37%	29%	41%	32%
	32%	24%	38%	30%	40%	22%
All-inclusive lodge or touring packages	30%	18%	34%	34%	41%	25%
	30%	13%	32%	36%	37%	29%
Photography or nature interpretation guided experiences	30%	24%	34%	28%	33%	30%
	29%	29%	33%	25%	34%	24%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	26%	21%	33%	27%	27%	17%
	27%	28%	31%	27%	23%	11%
Indigenous-led cultural or land-based experiences	25%	26%	26%	21%	25%	28%
	26%	28%	24%	24%	27%	25%

All auto/RV tourers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

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

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

Past visitors are more likely to be interested in auto/RV touring rallies, races or club events (18% vs. 13%).

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

Additional experience	Overall (n=1,108 / 563)	Partners (n=176 / 73)	Younger Families (n=317 / 218)	Older Families (n=371 / 159)	Younger Friends (n=66 / 42)	Older Friends (n=118 / 47)
Learning and interpretation opportunities	22%	17%	25%	22%	22%	26%
	26%	19%	29%	27%	20%	21%
Youth or family-oriented introduction-to-auto/RV touring programs	16%	3%	28%	20%	13%	4%
	19%	3%	26%	28%	13%	3%
Auto/RV touring rallies, races, or club events	13%	9%	20%	12%	20%	7%
	18% ▲	13%	22%	16%	27%	3%
None – I prefer to focus entirely on auto/RV touring	3%	6%	3%	2%	3%	1%
	3%	3%	4%	2%	2%	3%

All auto/RV tourers (overall) | Have visited Northern Ontario (past 5 years)

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

Base: all auto/RV tourers (n=1,108; past visitors n=563). 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.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (1 OF 2)

Auto/RV tourers who provided a response

Past visitors are more likely than auto/RV tourers overall to name Northern Ontario's scenery and natural beauty as its greatest advantage (43% vs. 35%), followed by its wilderness (36%).

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

Advantage	Overall (n=1,096 / 559)	Ontario (n=108 / 90)	Rest of Canada (n=276 / 110)	U.S. Drive (n=576 / 289)	U.S. Fly (n=136 / 70)
Scenery / natural beauty / landscapes	35%	45%	24%	37%	42%
	43% ▲	46%	38%	43%	48%
Wilderness / untouched / pristine nature	31%	42%	25%	32%	29%
	36%	43%	30%	36%	36%
Uncrowded / quiet / remote / solitude	14%	15%	9%	16%	16%
	17%	13%	7%	20%	25%
Vast / open space / room to explore	11%	11%	9%	12%	16%
	14%	12%	8%	15%	21%

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who provided a response (n=1,096; past visitors n=559). 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?
"Don't know / not sure / never been / no advantage" (8%) not shown.
Coded open-ended responses; more than one theme could be coded per response.

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

Auto/RV tourers who provided a response

Past visitors are more likely to mention good roads and scenic routes (15% vs. 9%) and less likely to describe Northern Ontario as unique or new to them (6% vs. 10%).

Good roads and scenic routes are mentioned more by U.S. Drive (15% vs. 9%) and U.S. Fly (26% vs. 15%) visitors than by their markets overall.

Advantage	Overall (n=1,096 / 559)	Ontario (n=108 / 90)	Rest of Canada (n=276 / 110)	U.S. Drive (n=576 / 289)	U.S. Fly (n=136 / 70)
Variety of things to do / places to explore	11%	17%	7%	11%	16%
	14%	19%	6%	15%	19%
Unique / different / new to me / in Canada	10%	5%	14%	8%	8%
	6% ▼	7%	8%	5%	9%
Lakes / rivers / water	9%	12%	9%	8%	12%
	11%	15%	7%	10%	21%
Good roads / scenic routes and drives	9%	8%	5%	9%	15%
	15% ▲	9%	10%	15% ▲	26% ▲

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who provided a response (n=1,096; past visitors n=559). 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?
"Don't know / not sure / never been / no advantage" (8%) not shown.
Coded open-ended responses; more than one theme could be coded per response.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (1 OF 2)

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

Past visitors are more likely than auto/RV tourers overall to name scenery and natural beauty as Northern Ontario's greatest advantage (43% vs. 35%).

Younger family visitors are more likely than younger families overall to mention wilderness and untouched nature (41% vs. 34%).

Advantage	Overall (n=1,096 / 559)	Partners (n=174 / 73)	Younger Families (n=314 / 217)	Older Families (n=366 / 157)	Younger Friends (n=65 / 41)	Older Friends (n=118 / 47)
Scenery / natural beauty / landscapes	35%	28%	39%	36%	33%	40%
	43% ▲	38%	43%	47%	40%	57%
Wilderness / untouched / pristine nature	31%	35%	34%	30%	33%	23%
	36%	35%	41% ▲	33%	33%	33%
Uncrowded / quiet / remote / solitude	14%	11%	21%	13%	11%	8%
	17%	12%	22%	18%	12%	4%
Vast / open space / room to explore	11%	12%	16%	9%	8%	5%
	14%	16%	19%	10%	6%	4%

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who provided a response (n=1,096; past visitors n=559). 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?
"Don't know / not sure / never been / no advantage" (8%) not shown.
Coded open-ended responses; more than one theme could be coded per response.

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

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

Past visitors are more likely to mention good roads and scenic routes (15% vs. 9%) and less likely to describe Northern Ontario as unique or new to them (6% vs. 10%).

Younger family visitors are more likely than younger families overall to mention good roads and scenic routes (20% vs. 15%).

Advantage	Overall (n=1,096 / 559)	Partners (n=174 / 73)	Younger Families (n=314 / 217)	Older Families (n=366 / 157)	Younger Friends (n=65 / 41)	Older Friends (n=118 / 47)
Variety of things to do / places to explore	11%	8%	12%	11%	14%	9%
	14%	4%	14%	14%	19%	17%
Unique / different / new to me / in Canada	10%	9%	10%	10%	6%	13%
	6% ▼	8%	7%	5%	4%	7%
Lakes / rivers / water	9%	7%	10%	10%	10%	3%
	11%	12%	10%	16%	12%	2%
Good roads / scenic routes and drives	9%	6%	15%	8%	12%	0%
	15% ▲	10%	20% ▲	14%	16%	0%

All in base (overall) Have visited Northern Ontario (past 5 years)

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

Base: auto/RV tourers who provided a response (n=1,096; past visitors n=559). 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?
"Don't know / not sure / never been / no advantage" (8%) not shown.
Coded open-ended responses; more than one theme could be coded per response.