CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE II
Avid Boaters: All Boaters Report

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

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Alex Mazanik, CAIP
amazanik@crg.ca
(416) 820-7026

William Schatten, CAIP
wschatten@crg.ca
(416) 388-9455

50 Carroll Street, Toronto, Ontario

www.crg.ca

CONTEXT IS EVERYTHING

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KEY OBJECTIVES

Overview:
CRG worked collaboratively with Destination Ontario (DO) and Destination Northern Ontario (RTO13) (DNO) to conduct a quantitative segmentation study of 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 boating 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 Boater: The respondents who go recreational boating, have a boating operator certification or other proof of competency such as a Pleasure Craft Operator Card (now or in the past 2 years), go boating at least once a month during the boating season, and have a high household income (CA: $75K+ / US: $50K+)

Total Sample:
- Avid Boaters: n=967

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

Median Length of Interview:
- 20.7 minutes



REGIONAL SAMPLE SIZE

Regional Sample Size

Total	967
Canada	256
Ontario	100
Quebec	28
Manitoba	46
Alberta	44
British Columbia	38

U.S. Drive	605
Illinois	70
Ohio	80
New York	79
Michigan	70
Wisconsin	78
Minnesota	76
Pennsylvania	63
Indiana	35
New Jersey	53

U.S. Fly	106
California	39
Colorado	28
Texas	39



METHODOLOGY

Survey Language:
The survey was administered in English and French

Margin of Error:
Avid Boaters: ± 3.2%

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 boater: Aged 30–64, goes recreational boating, holds a boating operator certification or other proof of competency such as a Pleasure Craft Operator Card (now or in the past two years), boats at least once a month during the boating season, and has a household income of $75K+ (Canada) or $50K+ (U.S.). Boating (cruising) refers to recreational boating, not cruise-ship travel.

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

Past visitors: Respondents who have visited Northern Ontario for a boating trip in the past five years (63% of avid boaters, n=606).

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, transportation within the region and docking or mooring fees, 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 Boaters report (this report)
All avid boaters, n=967

Covers who avid boaters 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 boating segment, including those who have not yet visited Northern Ontario.

Past Visitors report
Avid boaters who have visited Northern Ontario for boating in the past five years, n=606

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 boaters on key measures.

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

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



TRAVELLER TYPE SEGMENTS

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

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

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

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

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

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

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



NORTHERN ONTARIO - REGIONS

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

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

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

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

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





EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – PROFILE & TRIP BEHAVIOUR

ALL AVID BOATERS

Boating is a family tradition on owned boats. Two-thirds (68%) were introduced by a family member, and half (52%) have been boating for more than 10 years, rising to 73% of older friend groups and 61% of older families, against about a third of younger families (33%) and younger friend groups (34%). Powerboats (76%), pontoons (28%) and cruisers or motor yachts (25%) are most common; U.S. Drive boaters are more likely to use pontoons (35%), and younger families cruisers (34%) and sailboats (21%). Most (86%) own their boat, falling to 74% of younger friend groups, who are more likely to rent or borrow (22%). Older and younger families each account for 32% of the estimated market. (See slides 29, 36–41, 45, 46)

Commitment is strongest among U.S. boaters. Eight in ten (83%) say boating is central to who they are, rising to 87% of U.S. Drive boaters and falling to 70% of Ontario boaters, and U.S. Fly boaters are the most likely to strongly agree (53%). For seven in ten, boating is always or usually the main purpose of their trips; U.S. Fly boaters are more likely to say always (27%), while Ontario boaters and partners are less likely to say usually (34% and 35%). Three in ten (29%) belong to a club, rising to 40% of U.S. Fly boaters and 39% of younger families. (See slides 47, 49–51)

It is a summer-centred activity with spring potential for U.S. boaters. Summer is preferred by 92%, and spring by 47%, rising to 67% of U.S. Fly boaters and falling to 30% of Ontario and 28% of Rest of Canada boaters, who are also less drawn to fall (20%). Boaters average 5.0 overnight trips a year of 3.9 nights, with partners taking shorter trips (2.9 nights), and are willing to travel 8.4 hours one way, rising to 9.3 among U.S. Drive boaters and falling to 5.4 among Ontario boaters. Most drive (70%) and 57% tow their boat, falling to 42% of Ontario boaters. (See slides 42, 43, 53–57)

Planning and operator use differ by market and life stage. Two-thirds (64%) boat fully self-guided, but younger families are more likely to mix guided and self-guided boating (44%) and Ontario boaters less likely (19%). Word of mouth (56%) and internet search (48%) lead planning; younger families are more likely to use influencers (29%) and specialized apps (23%). Booking is mostly direct with accommodation providers (55%), online (43%) or with a marina (39%), and 61% are likely to use AI to plan, rising to 73% of younger families. (See slides 60, 61, 65–72, 77, 78, 80)



EXECUTIVE SUMMARY – MOTIVATIONS, VALUES & BARRIERS

ALL AVID BOATERS

Boaters are drawn by escape and time together. Escape (70%) and bonding with friends or family (66%) lead, followed by connection with nature (62%) and new places (61%). Partners are the exception, with less emphasis on escape (49%) and bonding (32%), and U.S. Fly boaters are more likely to be motivated by tradition or heritage (33%). Northern Lights viewing (60%), wildlife viewing (49%) and culinary experiences (44%) are the strongest add-ons, while younger families are more drawn to wellness experiences (31%), youth or family programs (29%) and boating rallies or club events (23%). (See slides 84–91)

Values are broadly shared, with U.S. Fly boaters the most engaged. Nine in ten (90%) feel a personal responsibility to protect the places they visit, and supporting local businesses (87%), conservation (86%) and community benefit (84%) are leading considerations. Two-thirds (69%) say certification is important, rising to 86% of U.S. Fly boaters and falling to 51% of partners. U.S. Fly boaters are the most interested in Indigenous-led experiences (86%) and Ontario boaters the least (46%), while Rest of Canada boaters are less willing to pay more for a conservation benefit (51%) and place less importance on learning about Indigenous culture (36%). (See slides 81, 110–115)

Cost leads the barriers, with distinct concerns by market. Cost (37%) leads, rising to 52% among Rest of Canada boaters, who are also more likely to cite poor value (44%) and distance (39%). Wildfires (31%), transportation costs (31%) and weather (30%) follow. Ontario boaters are more likely to cite weather (46%), poor access (43%) and insects (36%), older friend groups complicated licensing (39%), and 17% are concerned about limited marina capacity. Half (51%) say financial pressures have affected their travel plans. (See slides 146–154)



EXECUTIVE SUMMARY – DESTINATION STRENGTH & FUTURE DEMAND

ALL AVID BOATERS

The water is the product. Pristine lakes and waterways (94%) is the top-rated attribute, and 92% agree the region has excellent boating waters and marinas, with no significant differences by market or traveller type. Among boaters who know the region, 90% rate it 4 or 5 out of 5. The quality of waterways and safety are the leading decision factors (91% each); Ontario boaters place less importance on access to nature (78%) and clear licensing (76%), and Rest of Canada boaters on Indigenous experiences (31%) and connectivity (58%). (See slides 119, 121–124, 131–134)

Advocacy and intent are strong, especially among families and Ontario boaters. The Net Promoter Score is 35, rising to 48 among younger families and falling to 2 among partners. More than three-quarters (78%) are likely to visit in the next two years, rising to 91% of Ontario boaters and falling to 63% of Rest of Canada boaters, and Ontario boaters (61%) and younger families (56%) are the most likely to be very likely. Rest of Canada boaters are also the least likely to say they would seriously consider Northern Ontario (78%, against 93% of U.S. Drive boaters). Three-quarters (77%) would make Northern Ontario the only or primary destination of a trip. (See slides 120–122, 128–130)

Boaters want flexible lodging, including marinas. Short-term rentals (45%), drive-in lodges (44%), private cottages (42%) and commercial cottages (42%) lead lodging preferences, and a third (34%) would stay at a marina or dockage. Road-accessible areas are preferred by 80%, while remote boat-in access appeals to 48%, rising to 62% of U.S. Fly boaters and 57% of younger families, who are also more open to fly-in access (28%). (See slides 135–140)



EXECUTIVE SUMMARY – ESTABLISHED AUDIENCES & FUTURE GROWTH

ALL AVID BOATERS

Boating balances an established base of older families with younger families driving future growth. Older families make up 32% of the estimated market and remain central to it, although their trip frequency in Northern Ontario is generally stable or declining. Younger families are an equally large audience today (32%), and they show higher intent and are more likely to be taking more Northern Ontario trips than they were 10 years ago. (See slides 29 and 128, and slide 20 of the Past Visitors report)

Older families are the established core. They are long-time boaters (61% for more than 10 years), take 5.4 boating trips a year, and 80% are likely to visit in the next two years. Escape (76%) and bonding (71%) motivate them, and Northern Lights viewing (64%) is their top add-on. They prefer drive-in lodges (45%) and private cottages (43%) and plan through word of mouth (57%) and official tourism websites (41%), and cost (39%), weather (35%) and access (32%) are the concerns to address to keep them coming. (See slides 37, 42, 70, 86, 87, 90, 128, 139, 140, 150)

Younger families want family-oriented experiences and plan through social channels. Their Net Promoter Score (48) is above the segment and 82% are likely to visit. Bonding (68%) and escape (65%) lead their motivations, and wellness experiences (31%), youth or family programs (29%) and boating rallies or club events (23%) appeal to them more than to boaters overall. They are more likely to use cruisers (34%) and sailboats (21%), 44% mix guided and self-guided boating, and social media content (47%), influencers (29%) and specialized apps (23%) play a bigger role in their planning. (See slides 39, 61, 70, 71, 86, 87, 91, 120, 128)



EXECUTIVE SUMMARY – SPEND, YIELD & ECONOMIC POTENTIAL

ALL AVID BOATERS

Boating trips to Northern Ontario are high-value. Travel parties spent an average of $4,039 on their most recent trip, about $800 per visitor over 4.6 nights (roughly $170 per visitor per night), and seven in ten (71%) stayed in paid roofed accommodation.

U.S. visitors deliver the highest yield. U.S. Drive boaters spend about $940 per visitor and U.S. Fly boaters about $850, against $390 for Ontario boaters, who take the shortest trips (4.0 nights). The U.S. markets make up 84% of the potential market but 91% of its potential value. Ontario and Rest of Canada boaters are also less likely to stay in paid roofed lodging (51% and 54%).

Couples spend the most per person, and younger families the most per trip. Partners spend about $1,830 per visitor because they travel in pairs, while younger families spend the most per party ($4,251). Older families are the least likely to use paid lodging (62%), and friend groups spend about $3,770 to $3,810 per party.

Small gains in visitation or length of stay are worth a lot. Every 1,000 additional U.S. Drive boaters would bring about $940,000 in visitor spending and 4,700 visitor nights. Each extra night adds about $170 per visitor, which makes the levers to extend stays (better value, quality paid accommodation and more for travel companions to do) economically significant.



SPEND AND LENGTH OF STAY BY MARKET

ALL AVID BOATERS

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

Measure	Overall	Ontario	Rest of Canada	U.S. Drive	U.S. Fly
Average party spend per trip	$4,039	$1,932 ▼	$3,000	$4,681 ▲	$4,575
Average party size (people)	5.1	4.9	5.4	5.0	5.4
Spend per visitor per trip	$796	$392	$556	$943	$849
Average nights	4.6	4.0	4.5	4.7	4.6
Spend per visitor per night	$175	$98	$123	$202	$186
Stayed in paid roofed lodging	71%	51% ▼	54% ▼	78% ▲	79%

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



SPEND AND LENGTH OF STAY BY TRAVELLER TYPE

ALL AVID BOATERS

Younger families spend the most per trip; partners spend the most per person. Older families are the least likely to stay in paid roofed lodging (62%).

Measure	Overall	Partners	Younger families	Older families	Younger friends	Older friends
Average party spend per trip	$4,039	$3,699	$4,251	$4,004	$3,815	$3,771
Average party size (people)	5.1	2.0	5.9	5.8	4.8	4.1
Spend per visitor per trip	$796	$1,834	$718	$685	$791	$916
Average nights	4.6	4.2	4.7	4.5	4.2	4.7
Spend per visitor per night	$175	$439	$151	$153	$190	$194
Stayed in paid roofed lodging	71%	78%	74%	62% ▼	77%	72%

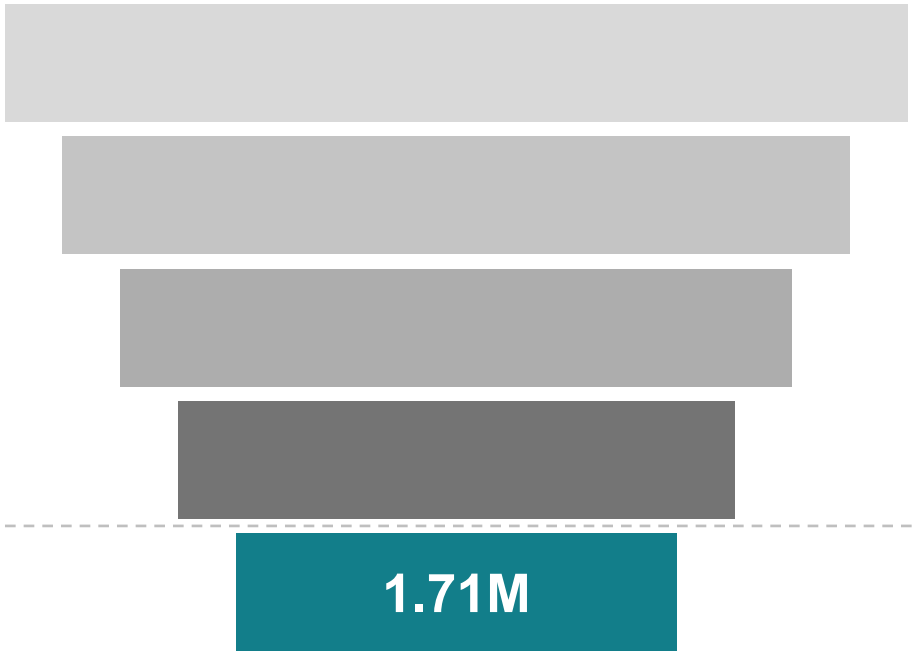
Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than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



MARKET SUMMARY

HOW THE OPPORTUNITY POOL IS BUILT: AVID BOATERS (CRUISING)

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



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

Recreational boaters
Residents who operate a registered recreational boat.

Aged 30–64
Recreational boaters within the study's target age range.

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

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

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

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

ESTIMATED NORTHERN ONTARIO OPPORTUNITY POOL: AVID BOATERS (CRUISING)

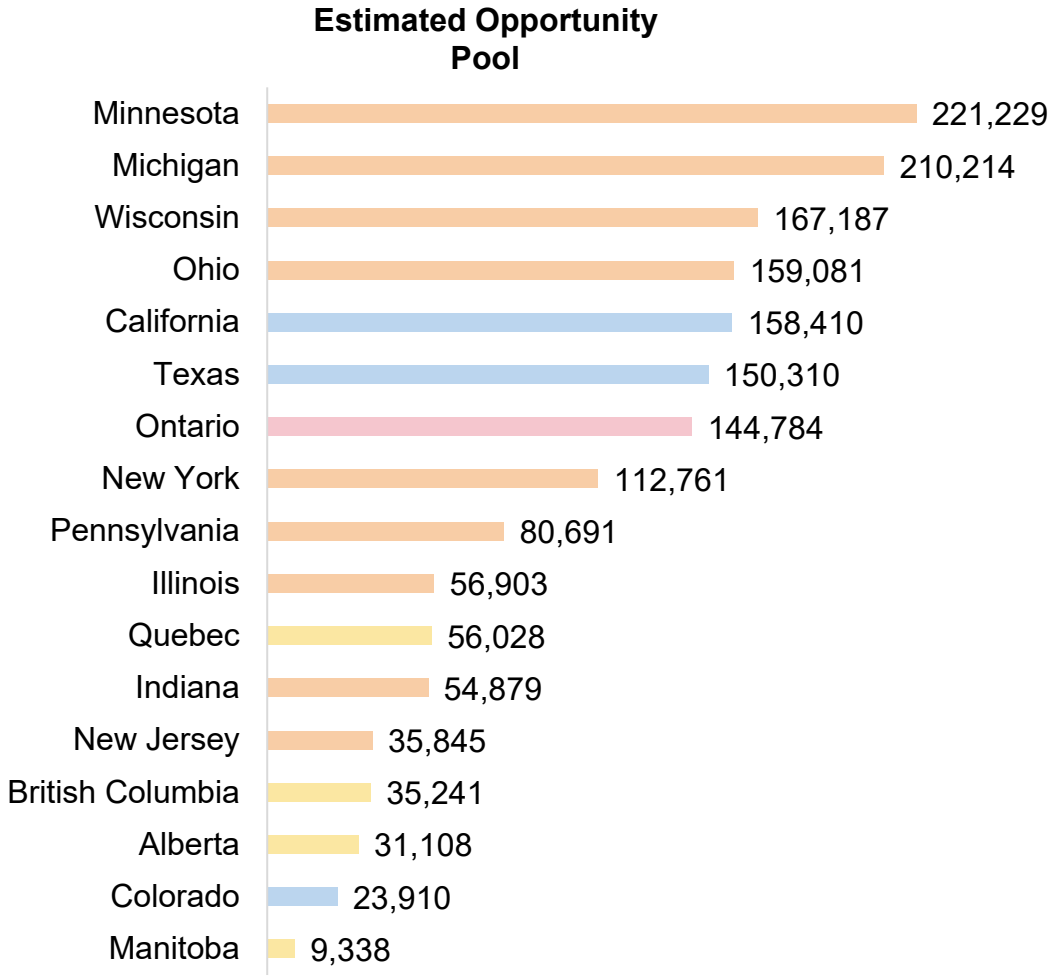
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO
144,784

Rest of Canada
131,714

U.S. Drive
1,098,789

U.S. Fly
332,630



Avid boaters aged 30–64 in the surveyed markets who told us they intend to take a boating trip to Northern Ontario in the next two years.
Not a forecast of visitors. All markets: 1,707,917.

INCREMENTAL VISITOR SPEND: AVID BOATERS (CRUISING)

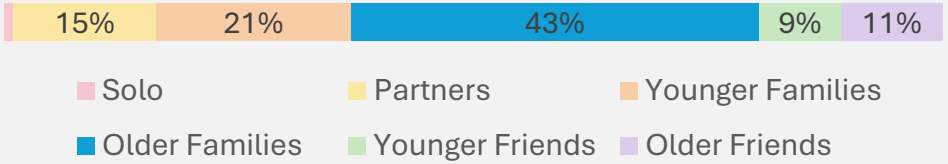
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO **144,784** Opportunity pool	**1,000** additional visitors	×	**$392** spend per visitor	=	**$392K** incremental visitor spend
Rest of Canada **131,714** Opportunity pool	**1,000** additional visitors	×	**$556** spend per visitor	=	**$556K** incremental visitor spend
U.S. Drive **1,098,789** Opportunity pool	**1,000** additional visitors	×	**$943** spend per visitor	=	**$943K** incremental visitor spend
U.S. Fly **332,630** Opportunity pool	**1,000** additional visitors	×	**$849** spend per visitor	=	**$849K** incremental visitor spend

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

ONTARIO – BOATING

ESTIMATED OPPORTUNITY POOL: 144,784



HOW THEY TRAVEL

- Ontario boaters are the most frequent visitors and the most likely to return, on trips closer to home with lower spend.
- 77% have boated in Northern Ontario in the past five years (the highest of any market), averaging 4.4 trips.
- Their most recent trip lasted 4.0 nights at $1,932 per party (the lowest of any market), and 51% stayed in paid roofed lodging.
- Private cottages (50%) and hotels or motels (39%) are the preferred lodging options.
- The Great Canadian Wilderness (51%) and Northeast Ontario (45%) are the most visited regions, and summer (96%) and fall (43%) the preferred seasons. (See slides 53, 137–138, and slides 17–18, 21, 25, 30–31 of the Past Visitors report)

WHAT MOTIVATES THEM

- Escape from everyday stress (69%) and bonding with friends or family (61%) are the leading motivations.
- Experiencing new places follows (58%).
- Northern Lights viewing (67%) and wildlife viewing (53%) are the strongest add-on experiences. (See slides 84–85, 88)

WHAT THEY VALUE

- Supporting local businesses (85%) and community benefit (82%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (50%) and paying more for a clear conservation benefit (57%) compare with 65% and 69% for the segment.
- 62% say a recognized certification or designation is important. (See slides 81, 110, 113)

WHAT HOLDS THEM BACK

- Weather or season timing (46%), poor road, trail or water access (43%) and wildfires and other disruptions (37%) are the leading barriers.
- Insects weighs more than for the segment overall (36% vs. 20%).
- 61% say financial pressures have affected their travel plans. (See slides 146–149, 154)

WHAT WOULD GROW THEM

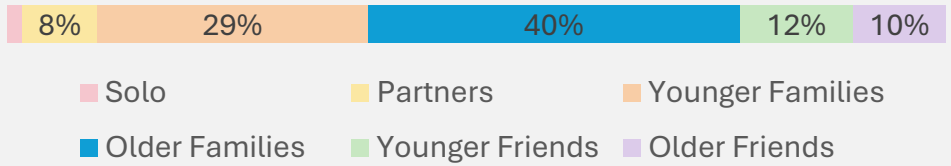
- More for travel companions to do (37%), better connectivity (35%) and quality paid accommodation (32%) would most encourage longer stays.
- 91% are likely to visit in the next two years (the highest of any market).
- Among those who know the region, Northern Ontario's NPS is 41 (segment 35). (See slides 120, 128, 141)

WHERE TO REACH THEM

- Word of mouth (62%), general search (34%) and social media content (32%) are the leading planning sources.
- Among social media users, YouTube (81%), Facebook (75%) and Instagram (64%) lead.
- 56% are likely to use AI tools to plan their next trip. (See slides 67, 73, 80)

REST OF CANADA – BOATING

ESTIMATED OPPORTUNITY POOL: 131,714



HOW THEY TRAVEL

- Rest of Canada boaters are the least likely to visit in the next two years and the most cost-sensitive.
- 65% have boated in Northern Ontario in the past five years, averaging 2.2 trips.
- Their most recent trip lasted 4.5 nights at $3,000 per party, and 54% stayed in paid roofed lodging.
- Private cottages (46%) and drive-in lodges or resorts (39%) are the preferred lodging options.
- Sunset Country (40%) and Superior Country (25%) are the most visited regions, and summer (97%) and spring (28%) the preferred seasons. (See slides 53, 128, 137–138, and slides 17–18, 21, 25, 30–31 of the Past Visitors report)

WHAT MOTIVATES THEM

- Bonding with friends or family (72%) and escape from everyday stress (72%) are the leading motivations.
- Connection with nature follows (58%).
- Northern Lights viewing (57%) and scenic driving (47%) are the strongest add-on experiences. (See slides 84–85, 88)

WHAT THEY VALUE

- Supporting local businesses (83%) and minimal environmental impact (82%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (36%) and paying more for a clear conservation benefit (51%) are lower than in the segment.
- 61% say a recognized certification or designation is important. (See slides 81, 110, 113)

WHAT HOLDS THEM BACK

- Cost (52%), poor value for money (44%) and distance (39%) are the leading barriers.
- 58% say financial pressures have affected their travel plans. (See slides 146–147, 154)

WHAT WOULD GROW THEM

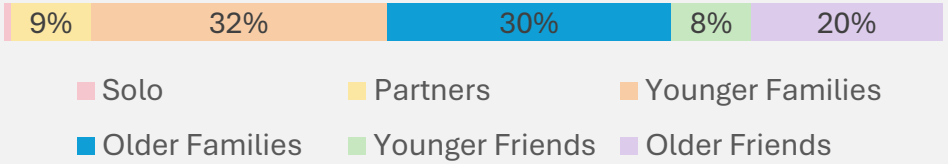
- Better value (34%), more for travel companions to do (24%) and quality paid accommodation (23%) would most encourage longer stays.
- 63% are likely to visit in the next two years (the lowest of any market).
- Among those who know the region, Northern Ontario's NPS is 25 (segment 35). (See slides 120, 128, 141)

WHERE TO REACH THEM

- Word of mouth (63%), general search (39%) and official tourism websites (34%) are the leading planning sources.
- Among social media users, YouTube (76%), Facebook (73%) and Instagram (51%) lead.
- 47% are likely to use AI tools to plan their next trip. (See slides 67, 73, 80)

U.S. DRIVE – BOATING

ESTIMATED OPPORTUNITY POOL: 1,098,789



HOW THEY TRAVEL

- U.S. Drive boaters are the largest market and drive the high-yield business.
- 61% have boated in Northern Ontario in the past five years, averaging 1.7 trips.
- Their most recent trip lasted 4.7 nights at $4,681 per party (the highest of any market), and 78% stayed in paid roofed lodging.
- Short-term rentals (47%) and drive-in lodges or resorts (46%) are the preferred lodging options.
- Sunset Country (29%) and Superior Country (26%) are the most visited regions, and summer (91%) and spring (51%) the preferred seasons. (See slides 53, 137–138, and slides 17–18, 21, 25, 30–31 of the Past Visitors report)

WHAT MOTIVATES THEM

- Escape from everyday stress (70%) and bonding with friends or family (67%) are the leading motivations.
- Connection with nature follows (64%).
- Northern Lights viewing (62%) and wildlife viewing (51%) are the strongest add-on experiences. (See slides 84–85, 88)

WHAT THEY VALUE

- Conservation (88%) and supporting local businesses (88%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (72%) and paying more for a clear conservation benefit (74%) are higher than in the segment.
- 69% say a recognized certification or designation is important. (See slides 81, 110, 113)

WHAT HOLDS THEM BACK

- Cost (35%), transportation costs (31%) and wildfires and other disruptions (30%) are the leading barriers.
- Distance is less of a concern (18% vs. 22%).
- 48% say financial pressures have affected their travel plans. (See slides 146–147, 154)

WHAT WOULD GROW THEM

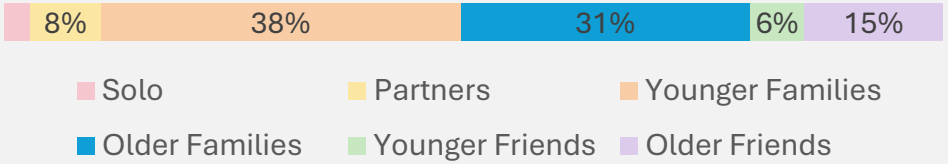
- Better value (35%), quality paid accommodation (31%) and more for travel companions to do (31%) would most encourage longer stays.
- 80% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 36 (segment 35). (See slides 120, 128, 141)

WHERE TO REACH THEM

- Word of mouth (53%), general search (52%) and social media content (42%) are the leading planning sources.
- Among social media users, YouTube (77%), Facebook (73%) and Instagram (59%) lead.
- 63% are likely to use AI tools to plan their next trip. (See slides 67, 73, 80)

U.S. FLY – BOATING

ESTIMATED OPPORTUNITY POOL: 332,630



HOW THEY TRAVEL

- U.S. Fly boaters are the strongest advocates and the most open to spring boating.
- 56% have boated in Northern Ontario in the past five years, averaging 1.7 trips.
- Their most recent trip lasted 4.6 nights at $4,575 per party, and 79% stayed in paid roofed lodging.
- Short-term rentals (52%) and hotels or motels (51%) are the preferred lodging options.
- Sunset Country (33%) and Superior Country (29%) are the most visited regions, and summer (89%) and spring (67%) the preferred seasons. (See slides 53, 137–138, and slides 17–18, 21, 25, 30–31 of the Past Visitors report)

WHAT MOTIVATES THEM

- Escape from everyday stress (70%) and connection with nature (66%) are the leading motivations.
- Tradition or cultural heritage matters more than in the segment overall (33% vs. 20%).
- Culinary experiences (51%) and Northern Lights viewing (50%) are the strongest add-on experiences. (See slides 84, 88)

WHAT THEY VALUE

- Supporting local businesses (90%) and community benefit (87%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (81%) and paying more for a clear conservation benefit (77%) are higher than in the segment.
- 86% say a recognized certification or designation is important (the highest of any market). (See slides 81, 110, 113)

WHAT HOLDS THEM BACK

- Cost (35%), transportation costs (30%) and distance (25%) are the leading barriers.
- 50% say financial pressures have affected their travel plans. (See slides 146–147, 154)

WHAT WOULD GROW THEM

- Quality paid accommodation (43%), better value (33%) and more for travel companions to do (30%) would most encourage longer stays.
- 74% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 43 (segment 35). (See slides 120, 128, 141)

WHERE TO REACH THEM

- Word of mouth (52%), general search (50%) and booking or review sites (40%) are the leading planning sources.
- Travel phone lines play a bigger role than for the segment (17% vs. 7%).
- Among social media users, Instagram (86%), YouTube (84%) and Facebook (81%) lead.
- 76% are likely to use AI tools to plan their next trip (the highest of any market). (See slides 67–69, 73, 80)



TRAVELLER TYPE SUMMARY

ESTIMATED OPPORTUNITY POOL BY TRAVELLER TYPE: AVID BOATERS (CRUISING)

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

SOLO
20,628

YOUNGER FAMILIES
541,849

YOUNGER FRIENDS
140,759

PARTNERS
151,416

OLDER FAMILIES
550,934

OLDER FRIENDS
302,331

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

PARTNERS – BOATING

ESTIMATED OPPORTUNITY POOL: 151,416

WHO THEY ARE
- Partners are the least motivated by escape or bonding, and among the most likely to say boating is rarely the main purpose of a trip.
- 21% have children under 18 at home, and the largest age group is 55 to 64 (41%).
- 59% have been boating for more than 10 years, and 74% say it is central to who they are.
- 16% belong to a club or association. (See slides 37, 47, 49)

HOW THEY TRAVEL
- 58% have boated in Northern Ontario in the past five years, averaging 1.7 trips.
- Their most recent trip lasted 4.2 nights at $3,699 per party, and 78% stayed in paid roofed lodging.
- Hotels or motels (45%) and drive-in lodges or resorts (37%) are the preferred lodging options.
- Northeast Ontario (22%) and Sunset Country (22%) are the most visited regions, and summer (89%) and fall (38%) the preferred seasons. (See slides 54, 139–140, and slides 17–18, 22, 25, 30–31 of the Past Visitors report)

WHAT MOTIVATES THEM
- Experiencing new places (51%) and connection with nature (51%) are the leading motivations.
- Bonding with friends or family matters less than in the segment overall (32% vs. 66%).
- Northern Lights viewing (45%) and wildlife viewing (39%) are the strongest add-on experiences. (See slides 86, 90)

WHAT THEY VALUE
- Supporting local businesses (89%) and conservation (86%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (55%) and paying more for a clear conservation benefit (59%) compare with 65% and 69% for the segment.
- 51% say a recognized certification or designation is important (the lowest of any traveller type). (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Weather or season timing (31%), wildfires and other disruptions (30%) and complicated licensing or permits (29%) are the leading barriers.
- 46% say financial pressures have affected their travel plans. (See slides 150, 154)

WHAT WOULD GROW THEM
- Better marina facilities (41%), better value (37%) and better connectivity (28%) would most encourage longer stays.
- 68% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 2, below the segment (35). (See slides 120, 128, 143)

WHERE TO REACH THEM
- Word of mouth (43%), general search (37%) and booking or review sites (25%) are the leading planning sources.
- Among social media users, YouTube (76%), Facebook (57%) and Instagram (49%) lead (small base).
- 62% are likely to use AI tools to plan their next trip. (See slides 70, 75, 80)

YOUNGER FAMILIES – BOATING

ESTIMATED OPPORTUNITY POOL: 541,849

WHO THEY ARE
- Younger families are the growth audience, accounting for half of those taking more trips than 10 years ago.
- 96% have children under 18 at home, and the largest age group is 35 to 44 (70%).
- 33% have been boating for more than 10 years (the lowest of any traveller type), and 87% say it is central to who they are.
- 39% belong to a club or association (the highest of any traveller type). (See slides 37, 47, 49)

HOW THEY TRAVEL
- 74% have boated in Northern Ontario in the past five years (the highest of any traveller type), averaging 2.5 trips.
- Their most recent trip lasted 4.7 nights at $4,251 per party, and 74% stayed in paid roofed lodging.
- Short-term rentals (53%) and hotels or motels (46%) are the preferred lodging options.
- Sunset Country (39%) and Superior Country (35%) are the most visited regions, and summer (93%) and spring (53%) the preferred seasons. (See slides 54, 139–140, and slides 17–18, 22, 25, 30–31 of the Past Visitors report)

WHAT MOTIVATES THEM
- Bonding with friends or family (68%) and escape from everyday stress (65%) are the leading motivations.
- Experiencing new places follows (61%).
- Northern Lights viewing (58%) and wildlife viewing (51%) are the strongest add-on experiences. (See slides 86–87, 90)

WHAT THEY VALUE
- Conservation (89%) and supporting local businesses (89%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (73%) and paying more for a clear conservation benefit (73%) are higher than in the segment.
- 76% say a recognized certification or designation is important (the highest of any traveller type). (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Cost (31%), wildfires and other disruptions (29%) and transportation costs (29%) are the leading barriers.
- Weather or season timing is less of a concern (23% vs. 30%).
- 54% say financial pressures have affected their travel plans. (See slides 150–152, 154)

WHAT WOULD GROW THEM
- Better value (33%), quality paid accommodation (32%) and more for travel companions to do (31%) would most encourage longer stays.
- 82% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 48, above the segment (35). (See slides 120, 128, 143)

WHERE TO REACH THEM
- Word of mouth (52%), general search (49%) and social media content (47%) are the leading planning sources.
- Influencers play a bigger role than for the segment (29% vs. 19%).
- Among social media users, Facebook (78%), YouTube (77%) and Instagram (75%) lead.
- 73% are likely to use AI tools to plan their next trip (the highest of any traveller type). (See slides 70–72, 75, 80)

OLDER FAMILIES – BOATING

ESTIMATED OPPORTUNITY POOL: 550,934

WHO THEY ARE
- Older families are the largest traveller type and long-time boaters.
- 73% have children under 18 at home, and the largest age group is 45 to 54 (60%).
- 61% have been boating for more than 10 years (above the segment's 52%), and 84% say it is central to who they are.
- 29% belong to a club or association. (See slides 37, 47, 49)

HOW THEY TRAVEL
- 62% have boated in Northern Ontario in the past five years, averaging 2.3 trips.
- Their most recent trip lasted 4.5 nights at $4,004 per party, and 62% stayed in paid roofed lodging.
- Drive-in lodges or resorts (45%) and private cottages (43%) are the preferred lodging options.
- Sunset Country (29%) and Northeast Ontario (21%) are the most visited regions, and summer (94%) and spring (42%) the preferred seasons. (See slides 54, 139–140, and slides 17–18, 22, 25, 30–31 of the Past Visitors report)

WHAT MOTIVATES THEM
- Escape from everyday stress (76%) and bonding with friends or family (71%) are the leading motivations.
- Connection with nature follows (63%).
- Northern Lights viewing (64%) and scenic driving (47%) are the strongest add-on experiences. (See slides 86–87, 90)

WHAT THEY VALUE
- Conservation (86%) and community benefit (83%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (64%) and paying more for a clear conservation benefit (71%) compare with 65% and 69% for the segment.
- 66% say a recognized certification or designation is important. (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Cost (39%), weather or season timing (35%) and poor road, trail or water access (32%) are the leading barriers.
- 50% say financial pressures have affected their travel plans. (See slides 150, 154)

WHAT WOULD GROW THEM
- Better value (35%), more for travel companions to do (29%) and improved access infrastructure (27%) would most encourage longer stays.
- 80% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 35 (segment 35). (See slides 120, 128, 143)

WHERE TO REACH THEM
- Word of mouth (57%), general search (45%) and official tourism websites (41%) are the leading planning sources.
- Among social media users, Facebook (82%), YouTube (82%) and Instagram (57%) lead.
- 53% are likely to use AI tools to plan their next trip (the lowest of any traveller type). (See slides 70, 75, 80)

YOUNGER FRIENDS – BOATING

ESTIMATED OPPORTUNITY POOL: 140,759

WHO THEY ARE
- Younger friend groups are newer boaters and the most likely to rent or borrow a boat.
- 31% have children under 18 at home, and the largest age group is 35 to 44 (59%).
- 34% have been boating for more than 10 years (below the segment's 52%), and 76% say it is central to who they are.
- 28% belong to a club or association. (See slides 37, 47, 49)

HOW THEY TRAVEL
- 62% have boated in Northern Ontario in the past five years, averaging 1.8 trips.
- Their most recent trip lasted 4.2 nights at $3,815 per party, and 77% stayed in paid roofed lodging.
- Drive-in lodges or resorts (52%) and short-term rentals (47%) are the preferred lodging options.
- Superior Country (25%) and Sunset Country (25%) are the most visited regions, and summer (92%) and spring (50%) the preferred seasons. (See slides 54, 139–140, and slides 17–18, 22, 25, 30–31 of the Past Visitors report)

WHAT MOTIVATES THEM
- Bonding with friends or family (72%) and escape from everyday stress (67%) are the leading motivations.
- Experiencing new places follows (62%).
- Northern Lights viewing (61%) and scenic driving (48%) are the strongest add-on experiences. (See slides 86–87, 90)

WHAT THEY VALUE
- Supporting local businesses (89%) and minimal environmental impact (85%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (64%) and paying more for a clear conservation benefit (63%) compare with 65% and 69% for the segment.
- 70% say a recognized certification or designation is important. (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Cost (44%), poor value for money (36%) and weather or season timing (35%) are the leading barriers.
- 57% say financial pressures have affected their travel plans. (See slides 150, 154)

WHAT WOULD GROW THEM
- More for travel companions to do (41%), better value (40%) and quality paid accommodation (40%) would most encourage longer stays.
- 72% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 25 (segment 35). (See slides 120, 128, 143)

WHERE TO REACH THEM
- Word of mouth (56%), social media content (45%) and general search (42%) are the leading planning sources.
- Among social media users, YouTube (85%), Facebook (65%) and TikTok (59%) lead.
- 59% are likely to use AI tools to plan their next trip. (See slides 70, 75, 80)

OLDER FRIENDS – BOATING

ESTIMATED OPPORTUNITY POOL: 302,331

WHO THEY ARE
- Older friend groups are the most experienced boaters but the least likely to have visited recently.
- 11% have children under 18 at home, and the largest age group is 55 to 64 (54%).
- 73% have been boating for more than 10 years (the highest of any traveller type), and 84% say it is central to who they are.
- 21% belong to a club or association. (See slides 37, 47, 49)

HOW THEY TRAVEL
- 48% have boated in Northern Ontario in the past five years (the lowest of any traveller type), averaging 1.3 trips.
- Their most recent trip lasted 4.7 nights at $3,771 per party, and 72% stayed in paid roofed lodging.
- Commercial cottages or cabins (58%) and drive-in lodges or resorts (50%) are the preferred lodging options.
- Sunset Country (22%) and Superior Country (20%) are the most visited regions, and summer (89%) and spring (53%) the preferred seasons. (See slides 54, 139–140, and slides 17–18, 22, 25, 30–31 of the Past Visitors report)

WHAT MOTIVATES THEM
- Escape from everyday stress (79%) and connection with nature (74%) are the leading motivations.
- Bonding with friends or family follows (74%).
- Northern Lights viewing (65%) and wildlife viewing (57%) are the strongest add-on experiences. (See slides 86–87, 90)

WHAT THEY VALUE
- Supporting local businesses (90%) and community benefit (85%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (60%) and paying more for a clear conservation benefit (66%) compare with 65% and 69% for the segment.
- 69% say a recognized certification or designation is important. (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Cost (49%), wildfires and other disruptions (43%) and transportation costs (41%) are the leading barriers.
- Complicated licensing or permits weighs more than for the segment overall (39% vs. 24%).
- 48% say financial pressures have affected their travel plans. (See slides 150–154)

WHAT WOULD GROW THEM
- Better connectivity (46%), quality paid accommodation (40%) and more packaged experiences (33%) would most encourage longer stays.
- 75% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 34 (segment 35). (See slides 120, 128, 143)

WHERE TO REACH THEM
- Word of mouth (66%), general search (61%) and social media content (43%) are the leading planning sources.
- Outdoor magazines play a bigger role than for the segment (38% vs. 24%).
- Among social media users, YouTube (74%), Facebook (64%) and Instagram (42%) lead.
- 55% are likely to use AI tools to plan their next trip. (See slides 70–72, 75, 80)



TRAVELLER & AVIDITY

YEARS BOATING – MARKET

All boaters

Half of boaters (52%) have been boating for more than 10 years, and a quarter (26%) for 6 to 10 years. One in five (20%) have been boating for 2 to 5 years, and 2% for less than 2 years.

Tenure is similar across markets, with more than 10 years of boating ranging from 47% among U.S. Fly boaters to 54% among Ontario and Rest of Canada boaters.

Years boating	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Less than 2 years	2%	0%	4%	2%	3%
2 to 5 years	20%	19%	23%	19%	23%
6 to 10 years	26%	27%	19%	27%	27%
More than 10 years	52%	54%	54%	52%	47%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). A1 How many years have you been boating as a hobby or recreational pursuit?

YEARS BOATING – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Older friend groups (73%) and older families (61%) are more likely than other traveller types to have been boating for more than 10 years.

Younger families (33%) and younger friend groups (34%) are less likely to have been boating for more than 10 years, and younger families are more likely to have been boating for 2 to 5 years (33%).

Years boating	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Less than 2 years	2%	1%	3%	2%	3%	<1%
2 to 5 years	20%	17%	33% ▲	12% ▼	31%	10%
6 to 10 years	26%	23%	32%	24%	32%	17%
More than 10 years	52%	59%	33% ▼	61% ▲	34% ▼	73% ▲

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

Base: all boaters (n=967). A1 How many years have you been boating as a hobby or recreational pursuit?

BOAT USED MOST OFTEN – MARKET

All boaters

Three-quarters of boaters (76%) most often use a powerboat such as a runabout, bowrider or fishing boat. About a quarter use a pontoon boat (28%) or a cruiser or motor yacht (25%), and 14% a sailboat.

U.S. Drive boaters are more likely than other markets to use a pontoon boat (35%), while Rest of Canada boaters are less likely (13%).

Powerboat use is highest among Rest of Canada boaters (84%).

Boat	Overall (n=966)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=604)	U.S. Fly (n=106)
Powerboat (runabout, bowrider, fishing boat)	76%	74%	84%	73%	81%
Pontoon boat	28%	16%	13% ▼	35% ▲	25%
Cruiser / motor yacht	25%	18%	21%	26%	27%
Sailboat	14%	12%	10%	14%	20%
Houseboat	8%	5%	3%	10%	7%
Other	2%	3%	5%	2%	<1%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=966). A2 Which of the following best describes the boat you most often use for boating trips? Please select all that apply.

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

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

BOAT USED MOST OFTEN – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use a cruiser or motor yacht (34%) or a sailboat (21%).

Older friend groups are less likely to use a cruiser or motor yacht (12%). Powerboats are the most common boat for every traveller type, from 66% among younger friend groups to 80% among younger families.

Boat	Overall (n=966)	Partners (n=87)	Younger Families (n=294)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Powerboat (runabout, bowrider, fishing boat)	76%	74%	80%	75%	66%	77%
Pontoon boat	28%	19%	33%	27%	32%	26%
Cruiser / motor yacht	25%	25%	34% ▲	21%	32%	12% ▼
Sailboat	14%	11%	21% ▲	12%	10%	8%
Houseboat	8%	7%	11%	8%	8%	5%
Other	2%	0%	2%	3%	0%	3%

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

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

Base: all boaters (n=966). A2 Which of the following best describes the boat you most often use for boating trips? Please select all that apply.

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

BOAT OWNERSHIP – MARKET

All boaters

Most boaters (86%) own their boat. One in ten (10%) rent or borrow when needed, and 3% lease.

Ownership ranges from 79% among Ontario boaters to 88% among U.S. Drive boaters. Ontario boaters are more likely than other markets to give another answer (5%).

Ownership	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Own	86%	79%	86%	88%	82%
Lease	3%	1%	1%	4%	5%
Rent or borrow when needed	10%	14%	12%	9%	13%
Other	1%	5% ▲	1%	<1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). A2B Do you own, lease, or rent your boat?

BOAT OWNERSHIP – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger friend groups are less likely than other traveller types to own their boat (74%) and more likely to rent or borrow when needed (22%).

Ownership is highest among partners (96%).

Ownership	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Own	86%	96%	87%	85%	74% ▼	87%
Lease	3%	1%	5%	2%	4%	2%
Rent or borrow when needed	10%	3%	8%	12%	22% ▲	9%
Other	1%	0%	<1%	1%	0%	1%

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

Base: all boaters (n=967). A2B Do you own, lease, or rent your boat?

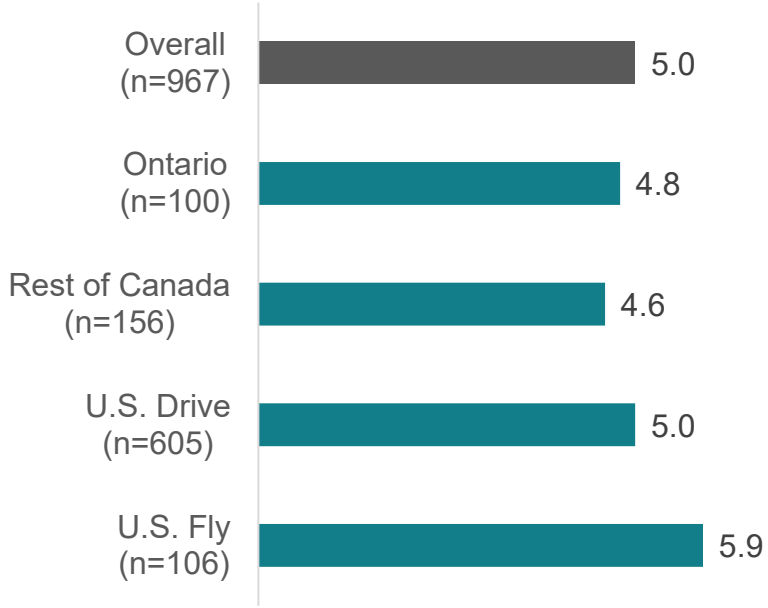
BOATING TRIPS PER YEAR

All boaters | Traveller types are defined on slide 10

Boaters take an average of 5.0 overnight trips per year where boating is the primary purpose.

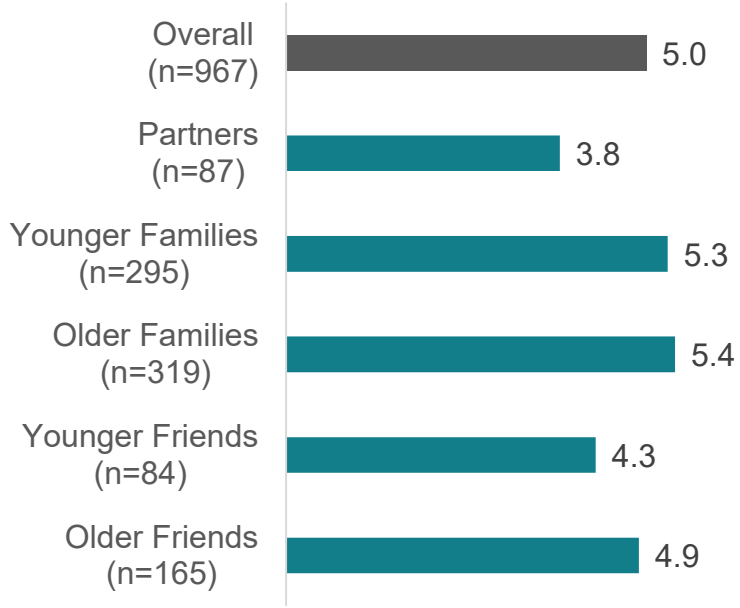
Averages range from 4.6 trips among Rest of Canada boaters to 5.9 among U.S. Fly boaters. Among traveller types, older families (5.4) and younger families (5.3) average the most trips and partners the fewest (3.8).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters (n=967). A3 Approximately how many overnight trips per year do you take where boating is the primary purpose? AVG = average number of overnight trips per year.

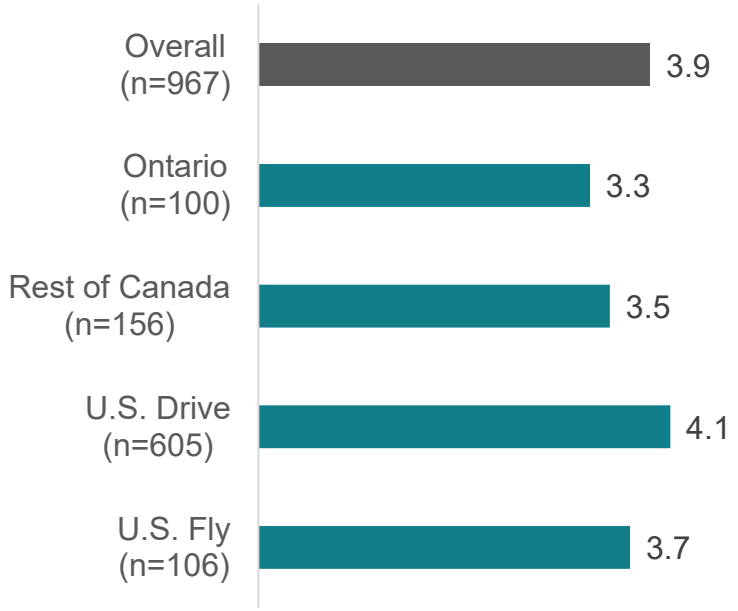
NIGHTS PER BOATING TRIP

All boaters | Traveller types are defined on slide 10

Boating trips last an average of 3.9 nights.

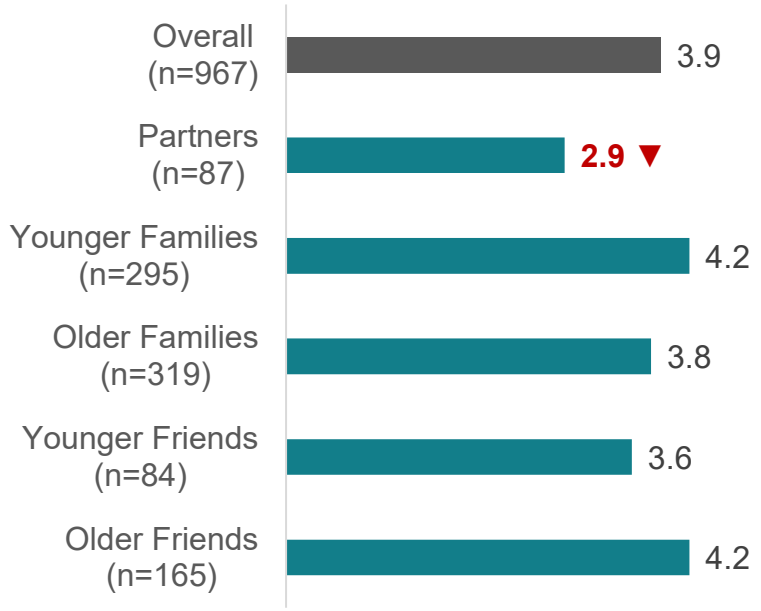
Trip length ranges from 3.3 nights among Ontario boaters to 4.1 among U.S. Drive boaters. Partners take shorter trips than other traveller types (2.9 nights), while younger families and older friend groups take the longest (4.2 nights each).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters (n=967). A4 How many nights do you typically spend on a boating trip? AVG = average number of nights.

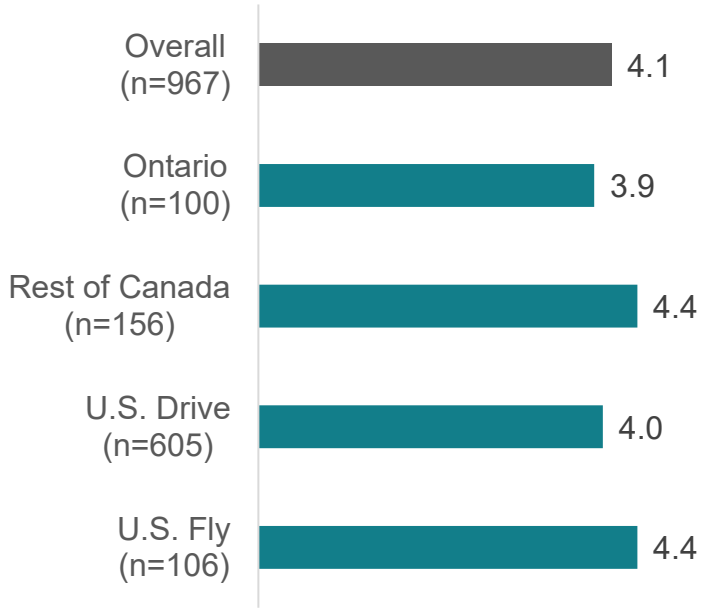
NUMBER OF PEOPLE TRAVELLED WITH ON BOATING TRIPS

All boaters | Traveller types are defined on slide 10

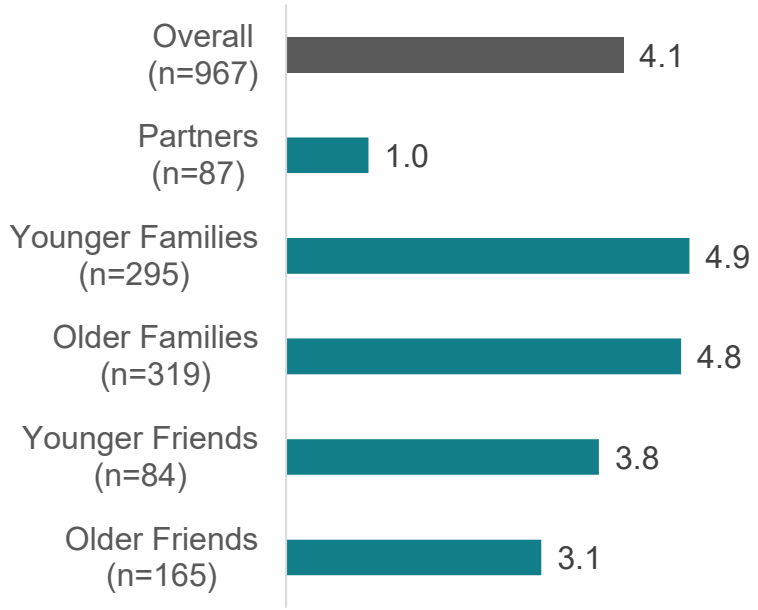
Boaters typically travel with an average of 4.1 people on a boating trip.

Families travel in the largest groups, with younger families averaging 4.9 people and older families 4.8. Partners average 1.0 people, consistent with travelling as a couple. Among markets, group size ranges from 3.9 among Ontario boaters to 4.4 among Rest of Canada and U.S. Fly boaters.

MARKET



TRAVELLER TYPE



Base: all boaters (n=967). A5 How many people do you typically travel with on a boating trip? AVG = sum of the average number of people reported for each category (partner or spouse, friends, children, other). Significance testing is not available for the combined average.

FIRST EXPOSURE TO BOATING – MARKET

All boaters

More than two-thirds of boaters (68%) got their first exposure to boating through a family member, and about one in five (19%) through friends or peers.

A family member is the most common source in every market, from 64% among U.S. Fly boaters to 72% among Ontario boaters. Few were introduced through school, camp or an organized program (5%).

First exposure	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
A family member	68%	72%	67%	68%	64%
School, camp, or organized program	5%	5%	5%	4%	5%
Friends or peers	19%	14%	17%	20%	22%
I discovered it on my own	9%	8%	10%	8%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). A9 Where did you get your first exposure to boating?
"Not sure" (<1%) not shown.

FIRST EXPOSURE TO BOATING – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

A family member is the most common source of first exposure for every traveller type, from 60% among younger friend groups to 76% among partners.

Younger friend groups are the most likely to have been introduced by friends or peers (32%).

First exposure	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
A family member	68%	76%	72%	67%	60%	62%
School, camp, or organized program	5%	4%	4%	6%	3%	5%
Friends or peers	19%	8%	16%	18%	32%	25%
I discovered it on my own	9%	10%	8%	8%	5%	8%

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

Base: all boaters (n=967). A9 Where did you get your first exposure to boating?
"Not sure" (<1%) not shown.

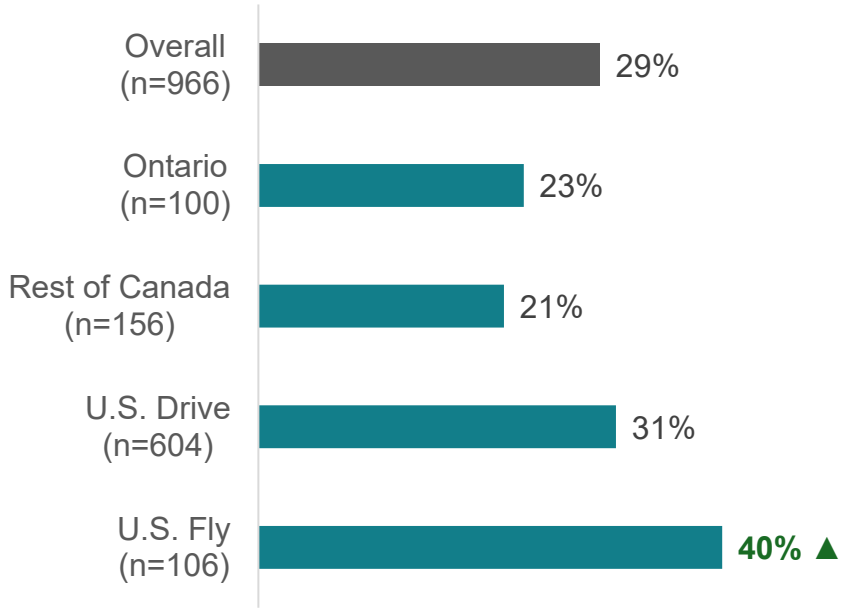
CLUB OR ASSOCIATION MEMBERSHIP

All boaters | Traveller types are defined on slide 10

About three in ten boaters (29%) are members of a boating-related club or association.

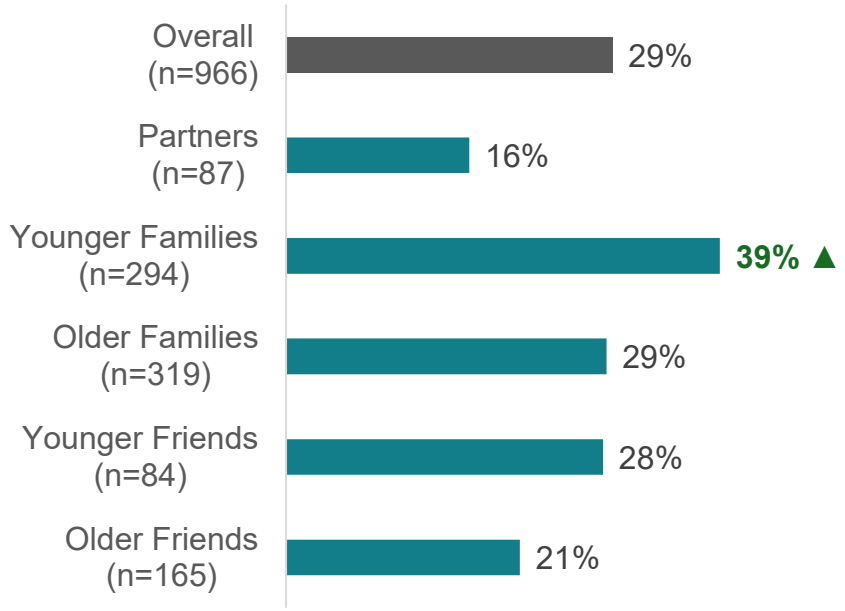
Membership is higher among U.S. Fly boaters (40%) and younger families (39%) than among other markets and traveller types. It is lowest among partners (16%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters (n=966). A10 Are you currently a member of a boating-related club or association (e.g., riding club, snowmobile club, yacht/boating club)? % Yes shown; “No” (70%) and “Not sure” (<1%) not shown.

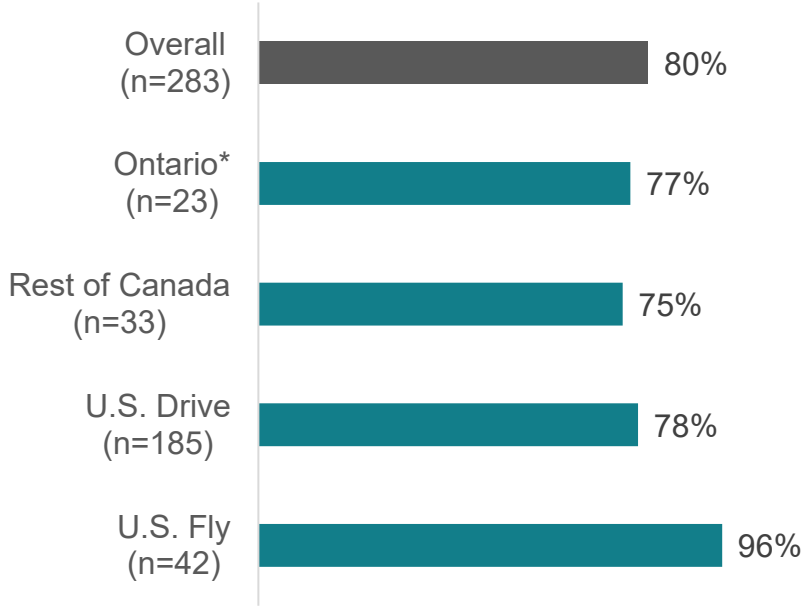
IMPORTANCE OF CLUB MEMBERSHIP

Boaters who are club or association members | Traveller types are defined on slide 10

Eight in ten club members (80%) say their club or association membership is important to their overall boating experience, including 49% who say it is very important.

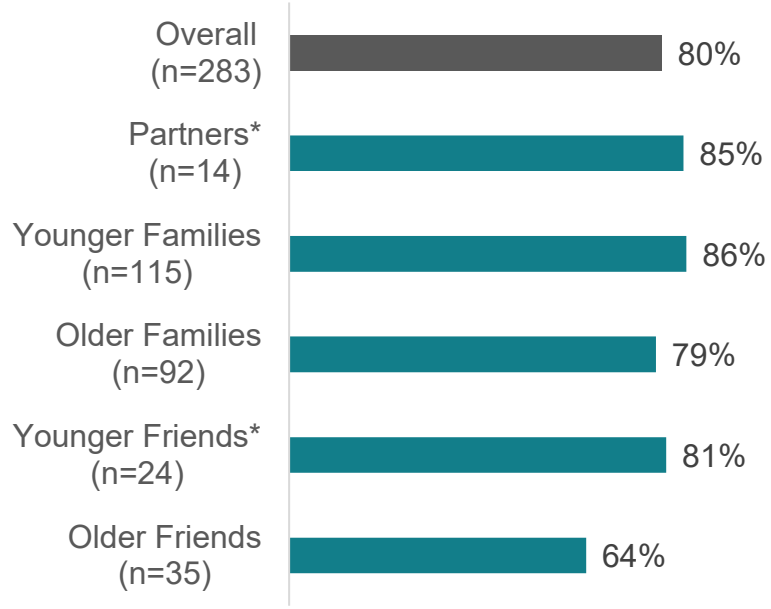
Importance ranges from 64% among older friend group members to 96% among U.S. Fly members, although several market and traveller type bases are small. None of the differences are significant.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: boaters who are members of a boating-related club or association (A10) (n=283). A10B (TOP2) How important is your club or association membership to your overall boating experience? TOP2 = % somewhat or very important. *Small base (n<30); interpret with caution.

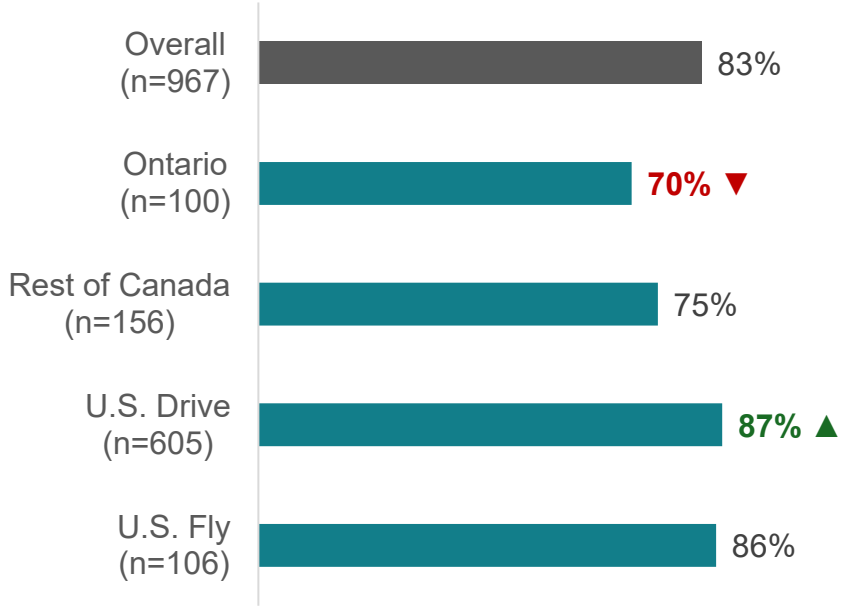
BOATING AS A CENTRAL PART OF IDENTITY

All boaters | Traveller types are defined on slide 10

More than eight in ten boaters (83%) agree that boating and boat culture is a central part of who they are, including 40% who strongly agree.

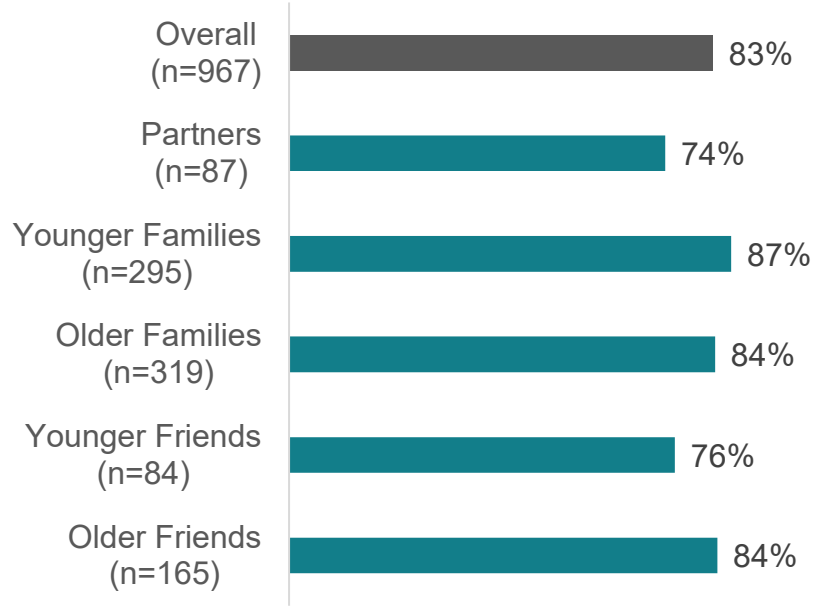
Agreement is higher among U.S. Drive boaters (87%) and lower among Ontario boaters (70%). Among traveller types, it ranges from 74% among partners to 87% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters (n=967). T2 (TOP2) How much do you agree or disagree with the following statement? “Boating and boat culture is a central part of who I am.” TOP2 = % somewhat or strongly agree.

ROLE OF BOATING IN TRAVEL DECISIONS – MARKET

All boaters

Seven in ten boaters say boating is always (17%) or usually (53%) the primary purpose of their trips.

U.S. Fly boaters are more likely than other markets to say it is always the primary purpose (27%), while Rest of Canada boaters are less likely (4%).

Ontario boaters are less likely to say it is usually the primary purpose (34%) and more likely to say it is rarely the primary purpose (12%), while U.S. Drive boaters are less likely to say it is rarely the primary purpose (3%).

Role in travel decisions	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
It is always the primary purpose of my trips	17%	18%	4% ▼	18%	27% ▲
It is usually the primary purpose, but not always	53%	34% ▼	57%	55%	53%
It is often a secondary activity alongside other trip purposes	25%	36%	26%	24%	19%
It is rarely the primary purpose of my trips	5%	12% ▲	9%	3% ▼	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). T2B Which of the following best describes the role boating plays in your travel decisions? “Not sure” (1%) not shown.

ROLE OF BOATING IN TRAVEL DECISIONS – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to say boating is always the primary purpose of their trips (23%), while older friend groups are less likely (6%).

Partners are less likely to say it is usually the primary purpose (35%). Partners (12%) and younger friend groups (15%) are more likely to say it is rarely the primary purpose, and younger families less likely (2%).

Role in travel decisions	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
It is always the primary purpose of my trips	17%	19%	23% ▲	16%	17%	6% ▼
It is usually the primary purpose, but not always	53%	35% ▼	51%	58%	43%	61%
It is often a secondary activity alongside other trip purposes	25%	34%	22%	23%	24%	29%
It is rarely the primary purpose of my trips	5%	12% ▲	2% ▼	4%	15% ▲	3%

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

Base: all boaters (n=967). T2B Which of the following best describes the role boating plays in your travel decisions? "Not sure" (1%) not shown.



HOW THEY TRAVEL

PREFERRED SEASON FOR BOATING – MARKET

All boaters

Summer is the preferred boating season for nine in ten boaters (92%), followed by spring (47%) and fall (40%). Few prefer winter (6%).

U.S. Fly boaters are more likely than other markets to prefer spring (67%), while Ontario (30%) and Rest of Canada (28%) boaters are less likely to.

Rest of Canada boaters are also less likely to prefer fall (20%).

Season	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Winter (December – February)	6%	0%	2%	6%	11%
Spring (March – May)	47%	30% ▼	28% ▼	51%	67% ▲
Summer (June – August)	92%	96%	97%	91%	89%
Fall (September – November)	40%	43%	20% ▼	44%	47%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). T1 What is your preferred season for taking a boating trip? Please select all that apply. "Not sure" (<1%) not shown.

PREFERRED SEASON FOR BOATING – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Summer is the top season for every traveller type, from 89% among partners and older friend groups to 94% among older families.

Younger families are more likely than other traveller types to prefer winter (10%).

Season	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Winter (December – February)	6%	9%	10% ▲	3%	5%	2%
Spring (March – May)	47%	37%	53%	42%	50%	53%
Summer (June – August)	92%	89%	93%	94%	92%	89%
Fall (September – November)	40%	38%	42%	36%	41%	46%

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

Base: all boaters (n=967). T1 What is your preferred season for taking a boating trip? Please select all that apply. "Not sure" (<1%) not shown.

HOW BOATERS GET TO THEIR DESTINATIONS – MARKET

All boaters

Seven in ten boaters (70%) get to their boating destinations by personal vehicle, and more than half (57%) by personal vehicle with a trailer.

U.S. Drive boaters are more likely than other markets to fly to a regional hub and then drive (16%), and U.S. Fly boaters to travel by RV or motorhome (19%).

Ontario boaters are less likely to travel with a trailer (42%).

Mode of travel	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Personal vehicle (car, truck, SUV)	70%	69%	68%	69%	79%
Personal vehicle with trailer (e.g., boat, camper, ATV)	57%	42% ▼	56%	60%	61%
Fly to a regional hub, then drive	13%	7%	6%	16% ▲	13%
RV / motorhome	9%	3%	11%	8%	19% ▲
Float plane or charter flight to a remote destination	7%	7%	5%	8%	7%
Other	1%	4%	4%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). T3 How do you typically get to your boating destinations? Please select all that apply. “Not sure” (<1%) not shown.

HOW BOATERS GET TO THEIR DESTINATIONS – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to travel by personal vehicle (77%) or by RV or motorhome (15%).

Partners are more likely to use another way of getting to their destinations (7%).

Mode of travel	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Personal vehicle (car, truck, SUV)	70%	67%	77% ▲	70%	73%	59%
Personal vehicle with trailer (e.g., boat, camper, ATV)	57%	44%	63%	56%	55%	60%
Fly to a regional hub, then drive	13%	12%	17%	9%	10%	18%
RV / motorhome	9%	3%	15% ▲	8%	12%	5%
Float plane or charter flight to a remote destination	7%	6%	10%	4%	5%	7%
Other	1%	7% ▲	<1%	1%	1%	1%

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

Base: all boaters (n=967). T3 How do you typically get to your boating destinations? Please select all that apply. "Not sure" (<1%) not shown.

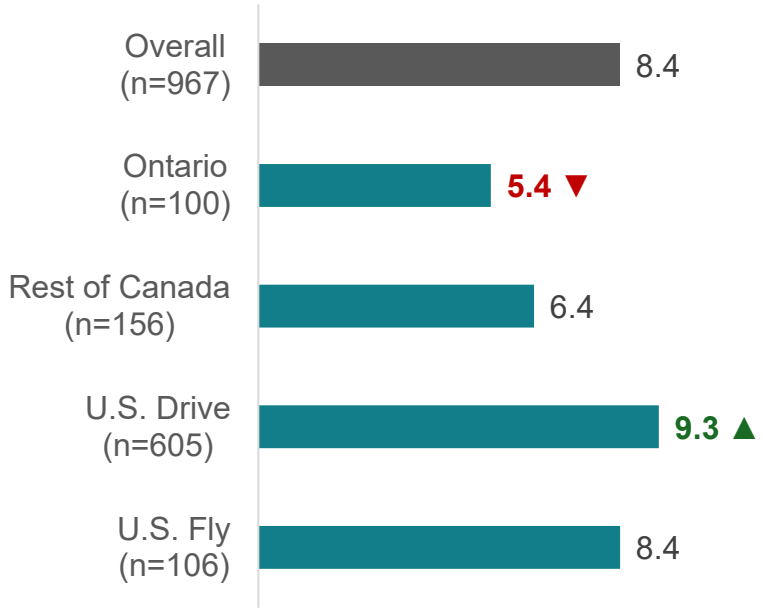
HOURS WILLING TO TRAVEL FOR A BOATING TRIP

All boaters | Traveller types are defined on slide 10

Boaters are willing to travel an average of 8.4 hours one way for a boating trip.

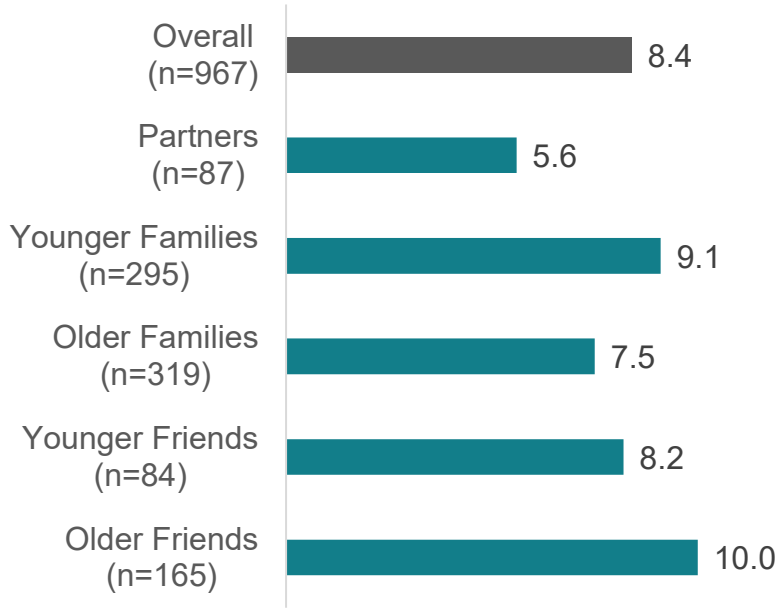
U.S. Drive boaters are willing to travel farther than other markets (9.3 hours), while Ontario boaters are willing to travel less (5.4 hours). Among traveller types, older friend groups are willing to travel the farthest (10.0 hours) and partners the least (5.6 hours).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters (n=967). T4 Approximately how many hours are you willing to travel (one way) for a boating trip? AVG = average number of hours.

APPROACH TO GEAR AND OUTFITTER USE – MARKET

All boaters

Half of boaters (50%) have their own gear or vehicle and do not use local outfitters or rental operators, while 45% also use them. Few (5%) rely on outfitters, rental operators or marinas for most knowledge, supplies and services.

The share who also use local outfitters or rental operators ranges from 34% among Rest of Canada boaters to 52% among U.S. Fly boaters.

Approach	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	50%	53%	57%	48%	45%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	45%	41%	34%	48%	52%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	5%	6%	9%	4%	3%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). T5 Which of the following best describes your approach to boating gear/vehicle and outfitter or rental operator use on overnight trips?

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

APPROACH TO GEAR AND OUTFITTER USE – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger families (51%) and younger friend groups (50%) are the most likely to combine their own gear with local outfitters or rental operators.

Partners (57%) and older families (56%) are the most likely to rely on their own gear alone.

Approach	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	50%	57%	44%	56%	42%	45%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	45%	41%	51%	40%	50%	47%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	5%	1%	4%	4%	8%	6%

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

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

Base: all boaters (n=967). T5 Which of the following best describes your approach to boating gear/vehicle and outfitter or rental operator use on overnight trips?

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

INDEPENDENT VS. GUIDED BOATING – MARKET

All boaters

Nearly two-thirds of boaters (64%) mainly go on their own or with their own group, fully self-guided, while a third (33%) use a mix of guided and self-guided.

Ontario boaters are less likely than other markets to use a mix (19%), with 77% going fully self-guided.

Approach	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
I mainly go on my own or with my own group – fully self-guided	64%	77%	61%	63%	62%
I use a mix of guided and self-guided	33%	19% ▼	33%	35%	36%
I mainly use guided or outfitted experiences provided by operators	2%	4%	4%	2%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). T6 When you go on a boating trip, do you mainly go independently or use guided/outfitted experiences?

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

INDEPENDENT VS. GUIDED BOATING – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use a mix of guided and self-guided (44%) and less likely to go fully self-guided (55%).

Partners are the most likely to go fully self-guided (75%).

Approach	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
I mainly go on my own or with my own group – fully self-guided	64%	75%	55% ▼	67%	60%	69%
I use a mix of guided and self-guided	33%	25%	44% ▲	29%	35%	29%
I mainly use guided or outfitted experiences provided by operators	2%	0%	1%	4%	6%	1%

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

Base: all boaters (n=967). T6 When you go on a boating trip, do you mainly go independently or use guided/outfitted experiences?

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

PREFERRED BOATING WATERS – MARKET

All boaters

Six in ten boaters (61%) prefer a mix of big-lake or open water and inland lakes and waterways. About one in five each prefer mostly big-lake or open water (19%) or mostly inland lakes and waterways (19%).

Preference for big-lake or open water is highest among Rest of Canada and U.S. Fly boaters (27% each), while U.S. Fly boaters are the least likely to prefer mostly inland waters (9%).

Preferred waters	Overall (n=966)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=604)	U.S. Fly (n=106)
Mostly big-lake/open water (e.g., Lake Superior, Lake Huron)	19%	22%	27%	16%	27%
Mostly inland lakes and waterways	19%	24%	15%	21%	9%
A mix of both	61%	52%	58%	63%	63%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=966). N9C Which of the following best describes your preferred boating waters?
"Not sure" (<1%) not shown.

PREFERRED BOATING WATERS – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

A mix of both is the most common preference for every traveller type, from 51% among partners to 64% among older families.

Partners (29%) and older friend groups (27%) are the most likely to prefer mostly inland lakes and waterways, and younger friend groups the most likely to prefer big-lake or open water (25%).

Preferred waters	Overall (n=966)	Partners (n=87)	Younger Families (n=294)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Mostly big-lake/open water (e.g., Lake Superior, Lake Huron)	19%	18%	23%	19%	25%	10%
Mostly inland lakes and waterways	19%	29%	14%	17%	16%	27%
A mix of both	61%	51%	63%	64%	59%	62%

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

Base: all boaters (n=966). N9C Which of the following best describes your preferred boating waters? "Not sure" (<1%) not shown.



PLANNING & BOOKING

PLANNING LEAD TIME FOR BOATING TRIPS – MARKET

All boaters

Two-thirds of boaters start planning 1 to 3 months (33%) or 3 to 6 months (32%) in advance. About one in five plan 6 months or more ahead (20%), and 15% less than a month ahead.

Rest of Canada boaters are more likely than other markets to plan less than a month ahead (33%), while U.S. Drive boaters are less likely (9%).

Planning lead time	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Less than 1 month	15%	26%	33% ▲	9% ▼	8%
1 to 3 months	33%	34%	29%	33%	34%
3 to 6 months	32%	23%	18%	35%	39%
6 to 12 months	17%	16%	14%	18%	16%
More than 12 months in advance	3%	1%	3%	3%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). B1 How far in advance do you typically start planning a boating trip? "Not sure" (1%) not shown.

PLANNING LEAD TIME FOR BOATING TRIPS – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Planning lead times are similar across traveller types, with 1 to 3 months or 3 to 6 months the most common for each.

Partners are the most likely to plan 6 to 12 months ahead (29%), and older families the most likely to plan less than a month ahead (20%).

Planning lead time	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Less than 1 month	15%	13%	12%	20%	13%	10%
1 to 3 months	33%	29%	36%	31%	38%	30%
3 to 6 months	32%	24%	36%	31%	29%	32%
6 to 12 months	17%	29%	13%	15%	18%	21%
More than 12 months in advance	3%	5%	2%	2%	2%	6%

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

Base: all boaters (n=967). B1 How far in advance do you typically start planning a boating trip? "Not sure" (1%) not shown.

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

All boaters

Word of mouth (56%) and general internet search (48%) are the most common sources boaters use for inspiration and planning, followed by social media content (39%), official tourism websites (34%) and online travel booking or review sites (32%).

Ontario boaters are less likely than other markets to use online travel booking or review sites (16%). General internet search ranges from 34% among Ontario boaters to 52% among U.S. Drive boaters.

Source	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Word of mouth (e.g., friends or family)	56%	62%	63%	53%	52%
General internet search (e.g., Google, Bing)	48%	34%	39%	52%	50%
Social media content (e.g., Instagram, Facebook, YouTube)	39%	32%	33%	42%	39%
Official tourism websites (e.g., national, provincial, state, regional, city)	34%	29%	34%	35%	38%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	16% ▼	22%	36%	40%
Travel information centres or visitor centres	27%	24%	20%	29%	24%
AI tools (e.g., ChatGPT, Gemini, Copilot)	27%	21%	17%	29%	33%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). B4 Which of the following do you use to find inspiration or plan your boating trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All boaters

About a quarter of boaters use articles, blogs or videos (24%), outfitter or lodge websites (24%), magazines and travel guides (24%), outdoor or sporting magazines (24%) and TV shows or documentaries (23%).

Use of these sources is generally highest among U.S. Fly boaters, including outfitter or lodge websites (33%) and outdoor or sporting magazines (34%).

Source	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Articles, blogs, or videos about travel destinations	24%	18%	23%	24%	32%
Outfitter or lodge websites	24%	22%	17%	25%	33%
Magazines, travel guides or brochures	24%	24%	16%	25%	28%
Outdoor or sporting magazines or publications	24%	14%	14%	26%	34%
TV shows or documentaries	23%	25%	12%	25%	25%
Social media influencers	19%	14%	20%	19%	23%
Forums or online communities	18%	13%	19%	18%	18%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	15%	15%	15%	14%	23%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). B4 Which of the following do you use to find inspiration or plan your boating trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All boaters

About one in ten boaters or fewer use club or association newsletters (12%), travel agents (10%), consumer shows (10%), email newsletters (8%), travel-related phone lines (7%) or rally or event calendars (6%).

U.S. Fly boaters are more likely than other markets to use travel-related phone lines or hotlines (17%).

Source	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Club or association newsletters or websites	12%	13%	5%	12%	20%
Travel agents	10%	5%	6%	11%	16%
Consumer shows/exhibitions	10%	8%	11%	10%	9%
Email newsletters	8%	8%	7%	9%	7%
Travel-related phone lines or hotlines	7%	3%	2%	8%	17% ▲
Rally or event calendars	6%	9%	7%	5%	5%
Other	1%	5% ▲	1%	<1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). B4 Which of the following do you use to find inspiration or plan your boating trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All boaters | Traveller types are defined on slide 10

Older friend groups are the most likely to use word of mouth (66%) and general internet search (61%).

Partners are less likely than other traveller types to use social media content (20%).

Source	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Word of mouth (e.g., friends or family)	56%	43%	52%	57%	56%	66%
General internet search (e.g., Google, Bing)	48%	37%	49%	45%	42%	61%
Social media content (e.g., Instagram, Facebook, YouTube)	39%	20% ▼	47%	35%	45%	43%
Official tourism websites (e.g., national, provincial, state, regional, city)	34%	24%	31%	41%	29%	37%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	25%	39%	31%	26%	33%
Travel information centres or visitor centres	27%	24%	28%	26%	25%	26%
AI tools (e.g., ChatGPT, Gemini, Copilot)	27%	19%	30%	27%	27%	24%

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

Base: all boaters (n=967). B4 Which of the following do you use to find inspiration or plan your boating trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use social media influencers (29%) and specialized apps (23%).

Older friend groups are more likely to use outdoor or sporting magazines or publications (38%).

Source	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Articles, blogs, or videos about travel destinations	24%	14%	24%	22%	30%	30%
Outfitter or lodge websites	24%	14%	25%	23%	26%	29%
Magazines, travel guides or brochures	24%	12%	22%	27%	18%	31%
Outdoor or sporting magazines or publications	24%	13%	22%	19%	22%	38% ▲
TV shows or documentaries	23%	17%	27%	21%	21%	26%
Social media influencers	19%	11%	29% ▲	14%	21%	15%
Forums or online communities	18%	14%	21%	15%	20%	19%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	15%	12%	23% ▲	12%	17%	9%

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

Base: all boaters (n=967). B4 Which of the following do you use to find inspiration or plan your boating trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use travel-related phone lines or hotlines (12%).

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

Source	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Club or association newsletters or websites	12%	6%	16%	12%	10%	9%
Travel agents	10%	9%	10%	10%	9%	11%
Consumer shows/exhibitions	10%	4%	11%	10%	6%	10%
Email newsletters	8%	8%	7%	9%	8%	10%
Travel-related phone lines or hotlines	7%	6%	12% ▲	4%	9%	4%
Rally or event calendars	6%	6%	8%	6%	4%	3%
Other	1%	0%	0%	2%	1%	0%

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

Base: all boaters (n=967). B4 Which of the following do you use to find inspiration or plan your boating trips? Please select all that apply.

"Not sure" (2%) not shown.

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – MARKET (1 OF 2)

Boaters who use social media to plan

YouTube (78%) and Facebook (74%) are the most used social media platforms for boating information, followed by Instagram (61%) and TikTok (44%).

U.S. Fly boaters are more likely than other markets to use Instagram (86%).

Platform	Overall (n=462)	Ontario (n=38)	Rest of Canada (n=67)	U.S. Drive (n=304)	U.S. Fly (n=53)
YouTube	78%	81%	76%	77%	84%
Facebook	74%	75%	73%	73%	81%
Instagram	61%	64%	51%	59%	86% ▲
TikTok	44%	40%	48%	42%	52%
Reddit	34%	44%	33%	34%	35%
X (formerly known as Twitter)	30%	27%	21%	31%	39%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who use social media to plan (B4) (n=462). B4B Which social media platforms do you use to obtain information about your boating trips? Please select all that apply.

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

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – MARKET (2 OF 2)

Boaters who use social media to plan

Fewer than one in five boaters who use social media use Snapchat (19%), Pinterest (18%), WhatsApp (14%) or Threads (11%).

WhatsApp use is highest among U.S. Fly (27%) and Ontario (26%) boaters.

Platform	Overall (n=462)	Ontario (n=38)	Rest of Canada (n=67)	U.S. Drive (n=304)	U.S. Fly (n=53)
Snapchat	19%	10%	22%	19%	25%
Pinterest	18%	17%	17%	17%	24%
WhatsApp	14%	26%	12%	11%	27%
Threads	11%	12%	6%	11%	18%
Other	1%	0%	1%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who use social media to plan (B4) (n=462). B4B Which social media platforms do you use to obtain information about your boating trips? Please select all that apply.

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

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – TRAVELLER TYPE (1 OF 2)

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

Younger families are more likely than other traveller types to use Instagram (75%).

Partners are the least likely to use Facebook (57%), and older friend groups the least likely to use Instagram (42%) and TikTok (22%).

Platform	Overall (n=462)	Partners* (n=24)	Younger Families (n=174)	Older Families (n=135)	Younger Friends (n=41)	Older Friends (n=84)
YouTube	78%	76%	77%	82%	85%	74%
Facebook	74%	57%	78%	82%	65%	64%
Instagram	61%	49%	75% ▲	57%	59%	42%
TikTok	44%	46%	53%	41%	59%	22%
Reddit	34%	34%	37%	35%	47%	24%
X (formerly known as Twitter)	30%	28%	38%	28%	28%	18%

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

Base: boaters who use social media to plan (B4) (n=462). B4B Which social media platforms do you use to obtain information about your boating trips? Please select all that apply.

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

*Small base (n<30); interpret with caution.

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – TRAVELLER TYPE (2 OF 2)

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

Use of each remaining platform is 29% or lower for every traveller type.

Younger friend groups are the most likely to use Snapchat (29%).

Platform	Overall (n=462)	Partners* (n=24)	Younger Families (n=174)	Older Families (n=135)	Younger Friends (n=41)	Older Friends (n=84)
Snapchat	19%	23%	21%	16%	29%	12%
Pinterest	18%	18%	25%	15%	12%	13%
WhatsApp	14%	15%	18%	14%	17%	2%
Threads	11%	16%	12%	11%	7%	11%
Other	1%	0%	<1%	1%	1%	0%

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

Base: boaters who use social media to plan (B4) (n=462). B4B Which social media platforms do you use to obtain information about your boating trips? Please select all that apply.

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

*Small base (n<30); interpret with caution.

HOW BOATING TRIPS ARE BOOKED – MARKET

All boaters

Booking directly with accommodation providers (55%) is the most common way boaters book trips, followed by online booking platforms (43%) and booking directly with a marina or dockage provider (39%).

U.S. Fly boaters are more likely than other markets to book through a travel agent or tour operator (27%). Online booking platforms are used least by Ontario boaters (29%).

Booking method	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Directly with accommodation providers (lodge, hotel, cottage)	55%	45%	49%	58%	57%
Through an online booking platform (e.g., Booking.com, Expedia)	43%	29%	32%	46%	52%
Directly with a marina or dockage provider	39%	42%	31%	39%	47%
Informally through friends or personal contacts	28%	34%	33%	26%	31%
Directly with outfitters or guides	24%	24%	23%	24%	26%
Through a travel agent or tour operator	16%	15%	8%	17%	27% ▲
Through a sporting or outdoor club or association	11%	2%	6%	12%	15%
Other	1%	3%	1%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). B2 How do you typically book your boating trips? Please select all that apply.
"Not sure" (1%) not shown.

HOW BOATING TRIPS ARE BOOKED – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to book through a sporting or outdoor club or association (18%).

Older friend groups are the most likely to book directly with accommodation providers (68%), and younger friend groups to book informally through friends or personal contacts (40%).

Booking method	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Directly with accommodation providers (lodge, hotel, cottage)	55%	44%	54%	54%	53%	68%
Through an online booking platform (e.g., Booking.com, Expedia)	43%	25%	49%	41%	53%	38%
Directly with a marina or dockage provider	39%	32%	43%	34%	36%	47%
Informally through friends or personal contacts	28%	21%	29%	31%	40%	23%
Directly with outfitters or guides	24%	22%	28%	23%	21%	23%
Through a travel agent or tour operator	16%	13%	20%	18%	15%	9%
Through a sporting or outdoor club or association	11%	7%	18% ▲	8%	12%	4%
Other	1%	2%	<1%	1%	0%	1%

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

Base: all boaters (n=967). B2 How do you typically book your boating trips? Please select all that apply. "Not sure" (1%) not shown.

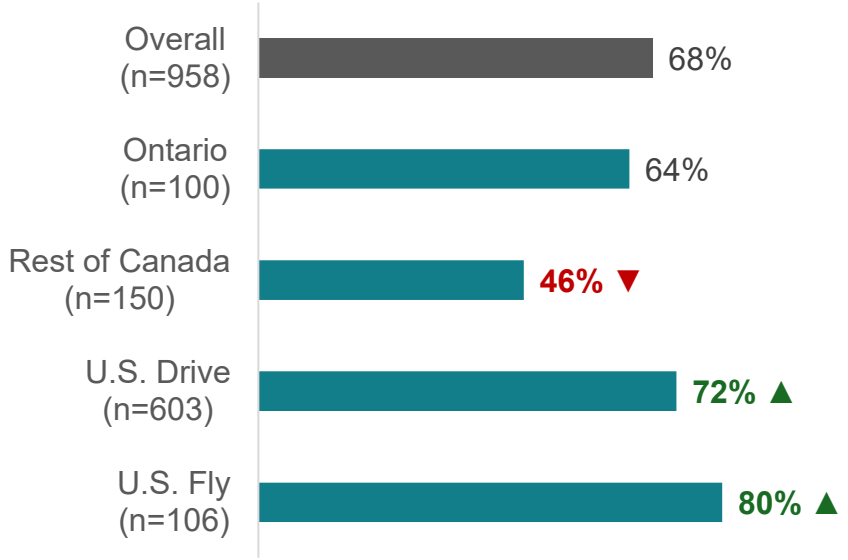
IMPORTANCE OF WORKING WITH LOCAL OPERATORS

All boaters | Traveller types are defined on slide 10

Two-thirds of boaters (68%) say working with a local outfitter, guide, rental operator, marina or accommodation provider is important when planning a trip.

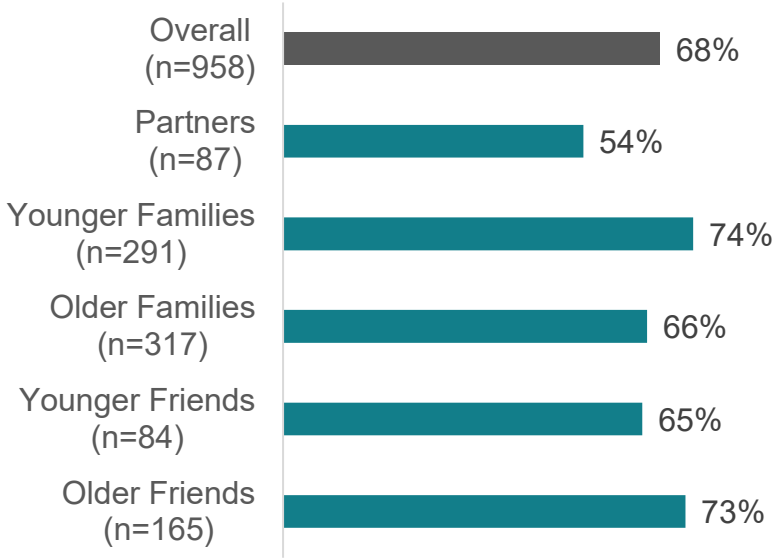
Importance is higher among U.S. Fly (80%) and U.S. Drive (72%) boaters and lower among Rest of Canada boaters (46%). Among traveller types, it ranges from 54% among partners to 74% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters, excluding “Don’t know” (n=958). B3 (TOP2) When planning a boating trip, how important is working with a local outfitter, guide, rental operator, marina, or accommodation provider? TOP2 = % somewhat or very important.
“Local operators” in this question include accommodation providers and marinas as well as outfitters, guides and rental operators.

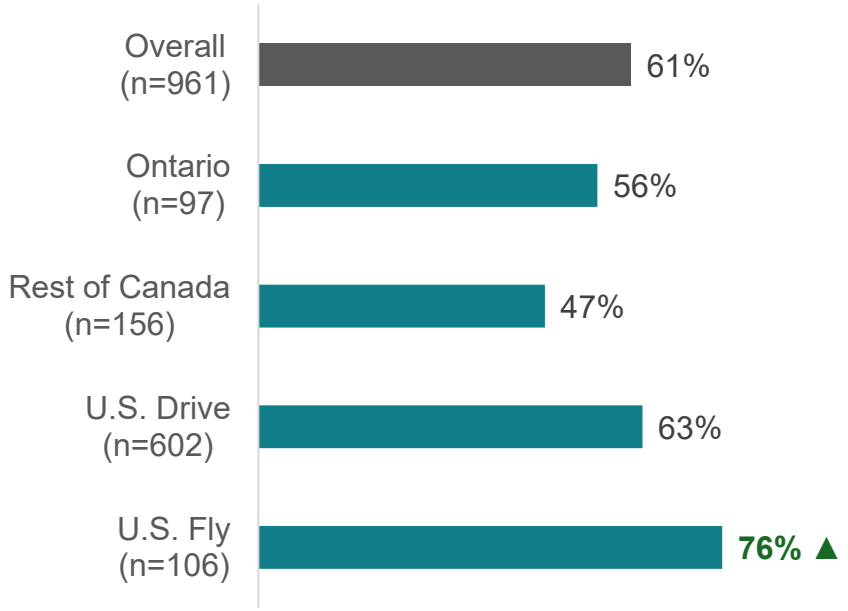
LIKELIHOOD OF USING AI TOOLS TO PLAN

All boaters | Traveller types are defined on slide 10

Six in ten boaters (61%) are likely to use AI tools to help plan their next boating trip.

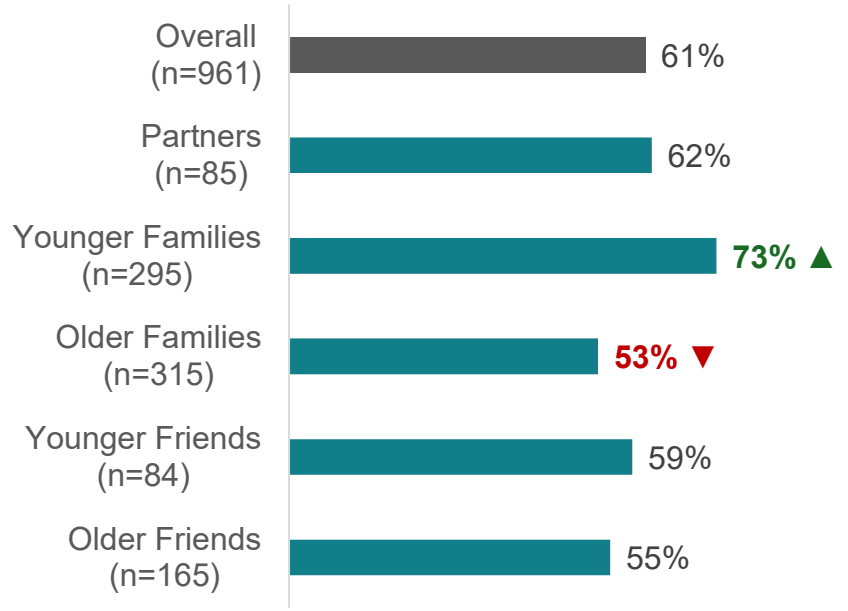
Likelihood is higher among U.S. Fly boaters (76%). Younger families are more likely than other traveller types to use AI tools (73%), while older families are less likely (53%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters, excluding “Don’t know” (n=961). B5 (TOP2) How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next boating trip? TOP2 = % somewhat or very likely.

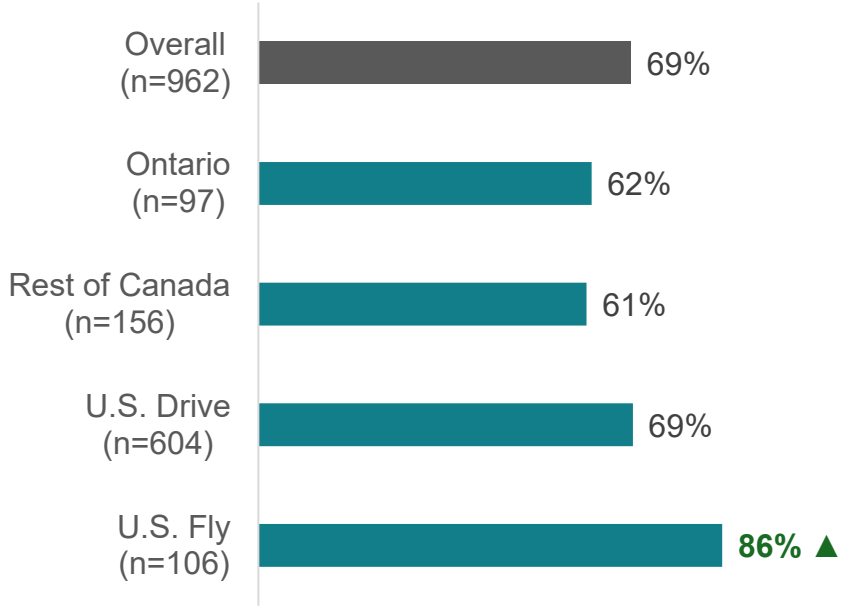
IMPORTANCE OF CERTIFICATION OR DESIGNATION

All boaters | Traveller types are defined on slide 10

Seven in ten boaters (69%) say it is important that accommodations, operators or destinations hold a recognized certification or designation.

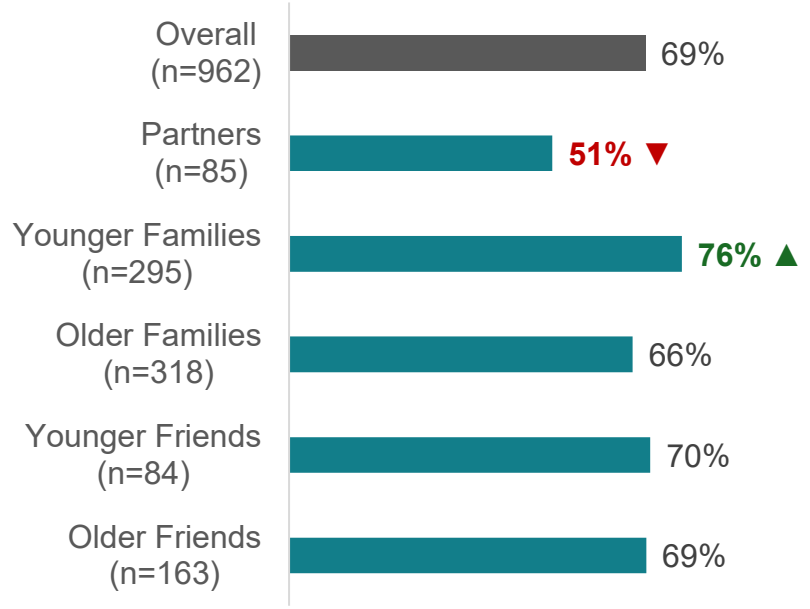
Importance is higher among U.S. Fly boaters (86%). Younger families place more importance on certification than other traveller types (76%), while partners place less (51%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters, excluding “Don’t know” (n=962). B6 (TOP2) How important is it that accommodations, operators, or destinations hold a recognized certification or designation (e.g., motorcycle-friendly, snowmobile-friendly, ORV-friendly)? TOP2 = % somewhat or very important.

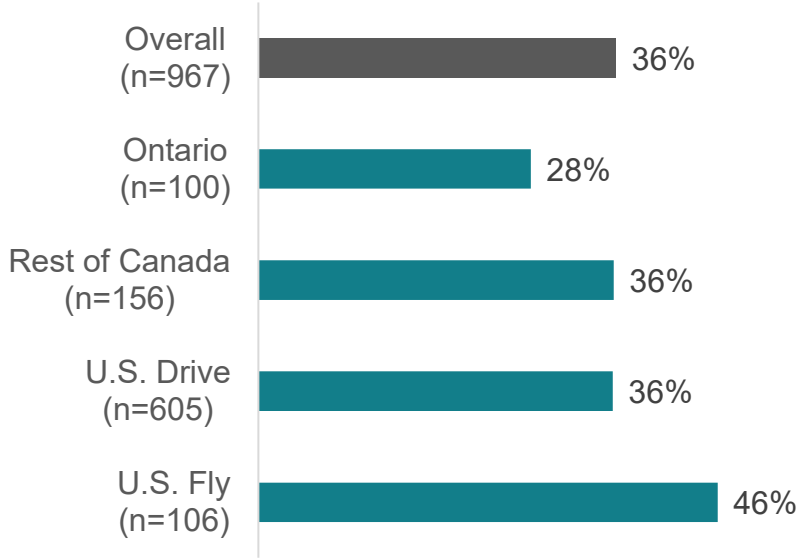
USE OF CERTIFIED ROUTES, TRAIL PASSES OR PASSPORT PROGRAMS

All boaters | Traveller types are defined on slide 10

A third of boaters (36%) have used an established or certified touring route, trail pass network or rewards/passport program when planning a boating trip.

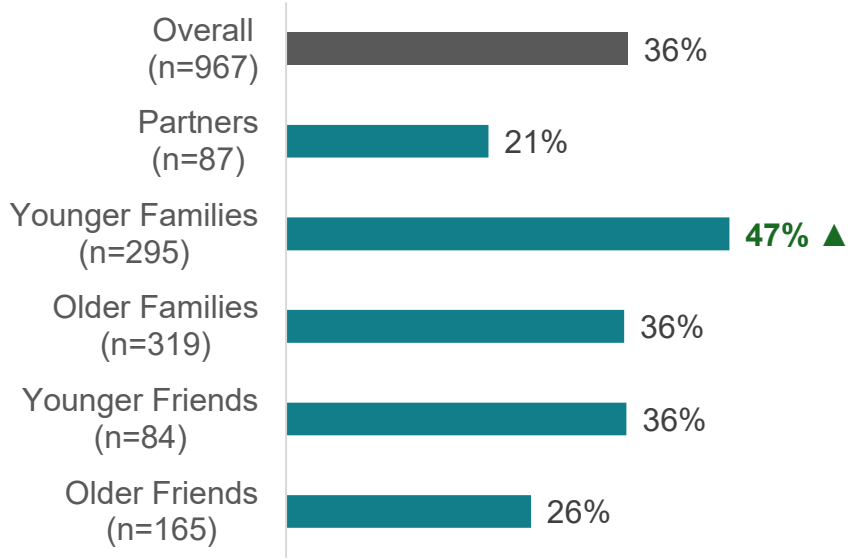
Use ranges from 27% among Ontario boaters to 46% among U.S. Fly boaters. Younger families are more likely than other traveller types to have used one (47%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters (n=967). 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 a boating trip? % Yes shown; “No” (56%) and “Not sure” (8%) not shown. The OFSC example in this question was shared across all five activities and is not specific to boating.



MOTIVATION & VALUES

MOTIVATIONS FOR BOATING – MARKET (1 OF 2)

All boaters

Escape from everyday stress and routine (70%) and bonding with friends or family (66%) are the top motivations for boating trips, followed by connection with nature (62%) and experiencing new places and landscapes (61%).

Motivations are similar across markets on these items. Bonding with friends or family is highest among Rest of Canada boaters (72%).

Motivation	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Escape from everyday stress and routine	70%	69%	72%	70%	70%
Bonding with friends or family	66%	61%	72%	67%	58%
Connection with nature and the outdoors	62%	54%	58%	64%	66%
Experiencing new places and landscapes	61%	58%	57%	63%	60%
Exploring open roads, trails, or waterways	50%	52%	39%	51%	55%
Wildlife encounters and natural discovery	48%	49%	45%	49%	48%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). M1 What are your primary motivations for taking boating trips? Please select all that apply. “Not sure” (<1%) not shown.

MOTIVATIONS FOR BOATING – MARKET (2 OF 2)

All boaters

Four in ten boaters (41%) are motivated by solitude and personal reflection, and 37% by thrill, challenge or a sense of adventure.

U.S. Fly boaters are more likely than other markets to be motivated by tradition or cultural heritage related to boating (33%).

Motivation	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Solitude and personal reflection	41%	34%	38%	42%	45%
Thrill, challenge, or sense of adventure	37%	36%	37%	37%	43%
Tradition or cultural heritage related to the activity	20%	12%	18%	20%	33% ▲
Camaraderie or connection with other boating enthusiasts	19%	19%	16%	20%	24%
Physical fitness and health	18%	17%	19%	16%	26%
Other	2%	8% ▲	3%	2%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). M1 What are your primary motivations for taking boating trips? Please select all that apply. “Not sure” (<1%) not shown.

MOTIVATIONS FOR BOATING – TRAVELLER TYPE (1 OF 2)

All boaters | Traveller types are defined on slide 10

Partners are less likely than other traveller types to be motivated by escape from everyday stress and routine (49%) or bonding with friends or family (32%).

Older friend groups are the most likely to be motivated by escape (79%), connection with nature (74%) and experiencing new places and landscapes (73%).

Motivation	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Escape from everyday stress and routine	70%	49% ▼	65%	76%	67%	79%
Bonding with friends or family	66%	32% ▼	68%	71%	72%	74%
Connection with nature and the outdoors	62%	51%	57%	63%	59%	74%
Experiencing new places and landscapes	61%	51%	61%	58%	62%	73%
Exploring open roads, trails, or waterways	50%	35%	51%	50%	54%	52%
Wildlife encounters and natural discovery	48%	37%	49%	49%	45%	55%

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

Base: all boaters (n=967). M1 What are your primary motivations for taking boating trips? Please select all that apply. “Not sure” (<1%) not shown.

MOTIVATIONS FOR BOATING – TRAVELLER TYPE (2 OF 2)

All boaters | Traveller types are defined on slide 10

Solitude and personal reflection ranges from 34% among partners to 47% among older friend groups.

Younger families are the most likely to be motivated by tradition or cultural heritage (26%) and camaraderie with other boating enthusiasts (24%).

Motivation	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Solitude and personal reflection	41%	34%	37%	42%	39%	47%
Thrill, challenge, or sense of adventure	37%	28%	43%	33%	43%	36%
Tradition or cultural heritage related to the activity	20%	10%	26%	19%	20%	18%
Camaraderie or connection with other boating enthusiasts	19%	11%	24%	17%	21%	20%
Physical fitness and health	18%	16%	20%	20%	17%	13%
Other	2%	4%	1%	2%	0%	6%

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

Base: all boaters (n=967). M1 What are your primary motivations for taking boating trips? Please select all that apply. "Not sure" (<1%) not shown.

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

All boaters

Northern Lights or dark sky viewing (60%) is the additional experience most likely to enhance a boating trip, followed by wildlife viewing (49%), culinary experiences featuring local food (44%) and scenic driving (43%).

U.S. Fly boaters show the highest interest in all-inclusive lodge or touring packages (48%) and multi-activity packages (45%), and Ontario boaters in Northern Lights viewing (67%). None of these market differences are significant.

Additional experience	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Northern Lights or dark sky viewing experiences	60%	67%	57%	62%	50%
Wildlife viewing separate from boating	49%	53%	38%	51%	49%
Culinary experiences featuring locally sourced or freshly caught / harvested food	44%	49%	41%	43%	51%
Scenic driving or road trip components	43%	34%	47%	44%	42%
All-inclusive lodge or touring packages	34%	22%	29%	35%	48%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	31%	22%	24%	32%	45%
Photography or nature interpretation guided experiences	29%	30%	25%	30%	29%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). M2 Beyond boating itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

All boaters

About one in five boaters are interested in multi-stop regional itineraries (23%), Indigenous-led experiences (23%) or wellness experiences (22%). Only 4% would prefer to focus entirely on boating.

U.S. Fly boaters are more likely than other markets to be interested in youth or family-oriented introduction-to-boating programs (26%).

Additional experience	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Multi-stop regional itineraries combining several Northern Ontario areas	23%	19%	9%	26%	31%
Indigenous-led cultural or land-based experiences	23%	17%	13%	26%	28%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	22%	24%	21%	22%	26%
Learning and interpretation opportunities	16%	16%	10%	17%	20%
Youth or family-oriented introduction-to-boating programs	16%	9%	14%	15%	26% ▲
Boating rallies, races, or club events	14%	15%	9%	15%	15%
None – I prefer to focus entirely on boating	4%	3%	9%	3%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). M2 Beyond boating itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

All boaters | Traveller types are defined on slide 10

Older friend groups show the highest interest in wildlife viewing (57%) and culinary experiences (56%), and partners the lowest interest in most of these experiences.

None of the traveller type differences on these experiences are significant.

Additional experience	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Northern Lights or dark sky viewing experiences	60%	45%	58%	64%	61%	65%
Wildlife viewing separate from boating	49%	39%	51%	46%	46%	57%
Culinary experiences featuring locally sourced or freshly caught / harvested food	44%	35%	42%	44%	39%	56%
Scenic driving or road trip components	43%	35%	40%	47%	48%	46%
All-inclusive lodge or touring packages	34%	34%	34%	31%	29%	43%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	31%	23%	34%	26%	28%	44%
Photography or nature interpretation guided experiences	29%	17%	31%	29%	32%	31%

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

Base: all boaters (n=967). M2 Beyond boating itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in wellness experiences (31%), youth or family-oriented programs (29%) and boating rallies, races or club events (23%).

Partners are the most likely to prefer to focus entirely on boating (11%).

Additional experience	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Multi-stop regional itineraries combining several Northern Ontario areas	23%	15%	26%	21%	27%	25%
Indigenous-led cultural or land-based experiences	23%	11%	26%	25%	16%	24%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	22%	25%	31% ▲	16%	33%	14%
Learning and interpretation opportunities	16%	9%	21%	11%	21%	16%
Youth or family-oriented introduction-to-boating programs	16%	5%	29% ▲	14%	8%	6%
Boating rallies, races, or club events	14%	11%	23% ▲	10%	10%	11%
None – I prefer to focus entirely on boating	4%	11%	3%	4%	3%	4%

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

Base: all boaters (n=967). M2 Beyond boating itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (1%) not shown.

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

Boaters who provided a response

When asked what makes a boating trip successful, boaters most often mention fun and enjoyment (39%) and time with family, friends or loved ones (31%), followed by relaxation (23%).

U.S. Fly boaters are more likely than other markets to mention safety and getting home safely (29%). Ontario boaters are the most likely to mention scenery, nature and wildlife (27%), fishing (21%) and good weather (21%).

Theme	Overall (n=964)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=603)	U.S. Fly (n=105)
Fun / enjoyment / a good time	39%	34%	27%	41%	49%
Time with family, friends or loved ones	31%	37%	32%	31%	24%
Relaxation / peace / stress-free	23%	15%	26%	25%	15%
Scenery / nature / wildlife	18%	27%	15%	18%	19%
Safety / no accidents / getting home safely	16%	10%	7%	17%	29% ▲
Calm water / good boating conditions	16%	9%	21%	16%	11%
Fishing / catching fish	15%	21%	16%	15%	9%
Good weather	14%	21%	14%	13%	13%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who provided a response (n=964). M3 In your own words, what makes a boating trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (<1%) not shown.

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

Boaters who provided a response

About one in eight boaters (13%) say a successful trip is one where everyone in the group enjoys it, and fewer than one in ten mention each of the other themes on this slide.

Everyone in the group enjoying it is mentioned most by U.S. Fly boaters (20%).

Theme	Overall (n=964)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=603)	U.S. Fly (n=105)
Everyone in the group enjoys it	13%	9%	6%	15%	20%
No problems / things go smoothly	8%	11%	3%	9%	6%
Bonding / making memories	7%	7%	1%	8%	13%
New experiences / exploring / learning	6%	2%	7%	7%	4%
Escape / getting away / unplugging / freedom	6%	5%	8%	6%	6%
Coming home happy / satisfied / wanting to return	4%	3%	9%	4%	4%
Good food and drink	4%	8%	3%	4%	2%
Good planning / preparation / reliable equipment	4%	9%	1%	4%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who provided a response (n=964). M3 In your own words, what makes a boating trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (<1%) not shown.

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

Boaters who provided a response

Each remaining theme is mentioned by 4% of boaters or fewer.

Ontario boaters are more likely than other markets to mention good accommodation or amenities (9%), Rest of Canada boaters affordability (8%) and U.S. Fly boaters good roads or routes (5%).

Theme	Overall (n=964)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=603)	U.S. Fly (n=105)
Good accommodation / campsites / amenities	3%	9% ▲	3%	2%	1%
Affordable / good value / on budget	2%	2%	8% ▲	1%	2%
Adventure / excitement / thrill	2%	2%	1%	1%	3%
Local culture / meeting people	1%	0%	1%	1%	1%
Good roads / routes / open road	1%	0%	0%	1%	5% ▲
Good trails / snow conditions	<1%	1%	0%	<1%	0%
General positive / vague	4%	1%	7%	5%	2%
Other	3%	3%	4%	3%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who provided a response (n=964). M3 In your own words, what makes a boating trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (<1%) not shown.

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

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

Older friend groups are more likely than other traveller types to say catching fish makes a trip successful (31%).

Older friend groups are also the most likely to mention relaxation (36%) and scenery (28%), while younger families are the most likely to mention fun and enjoyment (43%).

Theme	Overall (n=964)	Partners (n=87)	Younger Families (n=295)	Older Families (n=317)	Younger Friends (n=84)	Older Friends (n=165)
Fun / enjoyment / a good time	39%	30%	43%	41%	29%	38%
Time with family, friends or loved ones	31%	19%	34%	37%	28%	22%
Relaxation / peace / stress-free	23%	15%	18%	25%	14%	36%
Scenery / nature / wildlife	18%	12%	16%	18%	22%	28%
Safety / no accidents / getting home safely	16%	11%	17%	13%	20%	21%
Calm water / good boating conditions	16%	15%	13%	16%	16%	19%
Fishing / catching fish	15%	12%	12%	12%	9%	31% ▲
Good weather	14%	9%	14%	15%	14%	14%

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

Base: boaters who provided a response (n=964). M3 In your own words, what makes a boating trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

“Don’t know / not sure” (<1%) not shown.

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

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

Mentions of each theme on this slide are 16% or lower for every traveller type.

Younger families are the most likely to mention bonding and making memories (11%).

Theme	Overall (n=964)	Partners (n=87)	Younger Families (n=295)	Older Families (n=317)	Younger Friends (n=84)	Older Friends (n=165)
Everyone in the group enjoys it	13%	6%	16%	13%	13%	14%
No problems / things go smoothly	8%	6%	10%	8%	5%	8%
Bonding / making memories	7%	4%	11%	6%	4%	6%
New experiences / exploring / learning	6%	4%	6%	6%	6%	9%
Escape / getting away / unplugging / freedom	6%	2%	5%	8%	8%	7%
Coming home happy / satisfied / wanting to return	4%	6%	5%	6%	5%	1%
Good food and drink	4%	3%	1%	6%	3%	8%
Good planning / preparation / reliable equipment	4%	1%	5%	6%	0%	2%

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

Base: boaters who provided a response (n=964). M3 In your own words, what makes a boating trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

“Don’t know / not sure” (<1%) not shown.

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

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

Each remaining theme is mentioned by 9% or fewer in every traveller type.

Theme	Overall (n=964)	Partners (n=87)	Younger Families (n=295)	Older Families (n=317)	Younger Friends (n=84)	Older Friends (n=165)
Good accommodation / campsites / amenities	3%	2%	2%	3%	1%	1%
Affordable / good value / on budget	2%	1%	3%	1%	0%	7%
Adventure / excitement / thrill	2%	3%	2%	1%	3%	1%
Local culture / meeting people	1%	1%	1%	1%	1%	1%
Good roads / routes / open road	1%	0%	1%	1%	2%	2%
Good trails / snow conditions	<1%	0%	<1%	1%	0%	0%
General positive / vague	4%	7%	6%	4%	5%	2%
Other	3%	4%	3%	3%	9%	2%

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

Base: boaters who provided a response (n=964). M3 In your own words, what makes a boating trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

“Don’t know / not sure” (<1%) not shown.

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

Boaters who provided a response

Boaters see Northern Ontario's lakes, rivers and water (33%), scenery and natural beauty (30%) and wilderness (27%) as its greatest advantages for boating.

Rest of Canada boaters are the most likely to mention lakes, rivers and water (44%), and Ontario boaters wilderness (34%). None of the market differences are significant.

Advantage	Overall (n=965)	Ontario (n=100)	Rest of Canada (n=154)	U.S. Drive (n=605)	U.S. Fly (n=106)
Lakes / rivers / water	33%	38%	44%	29%	33%
Scenery / natural beauty / landscapes	30%	26%	24%	31%	35%
Wilderness / untouched / pristine nature	27%	34%	13%	29%	30%
Uncrowded / quiet / remote / solitude	18%	20%	12%	18%	21%
Vast / open space / room to explore	10%	5%	11%	10%	12%
Variety of things to do / places to explore	10%	8%	13%	9%	13%
Fishing	9%	13%	5%	9%	7%
Wildlife	8%	10%	5%	8%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who provided a response (n=965). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for boating trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (5%) not shown.

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

Boaters who provided a response

Fewer than one in ten boaters mention each of the advantages on this slide, led by Northern Ontario being unique or new to them (8%).

A clean environment and fresh air is mentioned most by Ontario boaters (10%).

Advantage	Overall (n=965)	Ontario (n=100)	Rest of Canada (n=154)	U.S. Drive (n=605)	U.S. Fly (n=106)
Unique / different / new to me / in Canada	8%	5%	9%	8%	7%
Clean environment / fresh air	5%	10%	1%	6%	2%
Northern lights / dark skies / stars	5%	4%	3%	6%	2%
Close to home / easy to get to	4%	7%	0%	5%	1%
Climate / cooler weather / seasons	2%	0%	2%	2%	3%
Escape from the city / everyday life	2%	0%	1%	2%	5%
Friendly / welcoming people / hospitality	2%	3%	2%	1%	5%
Affordable / good value	1%	1%	1%	2%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who provided a response (n=965). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for boating trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (5%) not shown.

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

Boaters who provided a response

Each remaining advantage is mentioned by 1% of boaters or fewer, and 7% give a general positive response.

Advantage	Overall (n=965)	Ontario (n=100)	Rest of Canada (n=154)	U.S. Drive (n=605)	U.S. Fly (n=106)
Culture / history / Indigenous heritage	1%	2%	0%	2%	1%
Good roads / scenic routes and drives	1%	1%	4%	1%	1%
Safe destination	1%	1%	0%	1%	1%
Trails / snow / terrain for riding	1%	3%	2%	1%	0%
Forests / trees / fall colours	<1%	1%	1%	<1%	0%
General positive / vague	7%	5%	7%	8%	9%
Other	3%	0%	6%	3%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who provided a response (n=965). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for boating trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (5%) not shown.

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

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

Lakes, rivers and water or scenery is the top advantage for every traveller type.

Older friend groups are the most likely to mention fishing (19%). None of the traveller type differences are significant.

Advantage	Overall (n=965)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=163)
Lakes / rivers / water	33%	22%	35%	34%	26%	38%
Scenery / natural beauty / landscapes	30%	27%	32%	30%	34%	26%
Wilderness / untouched / pristine nature	27%	24%	27%	28%	22%	31%
Uncrowded / quiet / remote / solitude	18%	15%	17%	18%	13%	21%
Vast / open space / room to explore	10%	5%	13%	9%	10%	8%
Variety of things to do / places to explore	10%	4%	9%	10%	7%	15%
Fishing	9%	9%	9%	5%	5%	19%
Wildlife	8%	8%	9%	8%	4%	7%

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

Base: boaters who provided a response (n=965). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for boating trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (5%) not shown.

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

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

Each of the advantages on this slide is mentioned by 10% or fewer in every traveller type.

Advantage	Overall (n=965)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=163)
Unique / different / new to me / in Canada	8%	5%	7%	10%	9%	4%
Clean environment / fresh air	5%	2%	4%	5%	5%	10%
Northern lights / dark skies / stars	5%	7%	5%	7%	4%	2%
Close to home / easy to get to	4%	6%	4%	2%	7%	4%
Climate / cooler weather / seasons	2%	3%	2%	1%	2%	2%
Escape from the city / everyday life	2%	0%	2%	1%	3%	2%
Friendly / welcoming people / hospitality	2%	1%	2%	3%	0%	0%
Affordable / good value	1%	0%	1%	1%	2%	3%

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

Base: boaters who provided a response (n=965). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for boating trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (5%) not shown.

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

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

Each remaining advantage is mentioned by 3% or fewer in every traveller type, apart from general positive responses (up to 10%).

Advantage	Overall (n=965)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=163)
Culture / history / Indigenous heritage	1%	0%	2%	1%	3%	2%
Good roads / scenic routes and drives	1%	0%	2%	1%	1%	1%
Safe destination	1%	0%	2%	1%	0%	1%
Trails / snow / terrain for riding	1%	0%	<1%	2%	0%	1%
Forests / trees / fall colours	<1%	1%	1%	0%	0%	0%
General positive / vague	7%	7%	10%	5%	10%	6%
Other	3%	3%	3%	3%	2%	2%

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

Base: boaters who provided a response (n=965). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for boating trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (5%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (1 OF 3)

Boaters who provided a response

Boaters most often describe sustainable tourism as protecting or preserving the environment and nature (35%), followed by minimal impact (19%) and tourism that lasts and keeps visitors coming back (16%).

Ontario boaters are the most likely to mention protecting the environment (40%) and minimal impact (25%). None of the market differences are significant.

Meaning	Overall (n=961)	Ontario (n=100)	Rest of Canada (n=154)	U.S. Drive (n=601)	U.S. Fly (n=106)
Protecting / preserving the environment and nature	35%	40%	31%	34%	38%
Minimal impact / not harming or damaging	19%	25%	20%	19%	11%
Tourism that lasts / keeps visitors coming back	16%	13%	18%	16%	12%
Leave no trace / leave it as you found it / no litter	11%	14%	14%	10%	8%
Good visitor experience (easy, enjoyable, lots to offer)	9%	5%	5%	10%	9%
Benefiting / respecting local communities	9%	4%	3%	10%	12%
Eco-friendly / green / recycling / less waste	8%	6%	11%	8%	8%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who provided a response (n=961). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

MEANING OF SUSTAINABLE TOURISM – MARKET (2 OF 3)

Boaters who provided a response

Fewer than one in ten mention eco-friendly practices (8%), respectful travel (7%), future generations (6%) or supporting the local economy (6%).

U.S. Fly boaters are the most likely to mention future generations (14%), respectful travel (12%) and the local economy (11%).

Meaning	Overall (n=961)	Ontario (n=100)	Rest of Canada (n=154)	U.S. Drive (n=601)	U.S. Fly (n=106)
Respectful / responsible / mindful travel	7%	7%	8%	6%	12%
For future generations / so others can enjoy it later	6%	5%	8%	5%	14%
Supporting the local economy / businesses	6%	4%	4%	7%	11%
Lower emissions / fuel / energy use	4%	7%	1%	4%	3%
Affordable / budget travel	3%	6%	4%	3%	2%
Responsible use of natural resources	3%	4%	1%	3%	3%
Respecting local culture / heritage	3%	0%	<1%	3%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who provided a response (n=961). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

MEANING OF SUSTAINABLE TOURISM – MARKET (3 OF 3)

Boaters who provided a response

Each remaining theme is mentioned by 3% of boaters or fewer, and 7% give a general positive response.

Meaning	Overall (n=961)	Ontario (n=100)	Rest of Canada (n=154)	U.S. Drive (n=601)	U.S. Fly (n=106)
Protecting wildlife and habitats	2%	1%	1%	3%	3%
Balancing visitors, environment and community	2%	4%	2%	3%	2%
Travelling / exploring / touring (term read literally)	2%	1%	1%	2%	2%
General positive / vague	7%	10%	2%	7%	10%
Other	6%	5%	4%	6%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who provided a response (n=961). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

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

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

Older friend groups are the most likely to describe sustainable tourism as tourism that lasts (25%), and younger friend groups as minimal impact (24%).

None of the traveller type differences are significant.

Meaning	Overall (n=961)	Partners (n=86)	Younger Families (n=294)	Older Families (n=316)	Younger Friends (n=84)	Older Friends (n=165)
Protecting / preserving the environment and nature	35%	33%	34%	37%	38%	30%
Minimal impact / not harming or damaging	19%	19%	18%	22%	24%	11%
Tourism that lasts / keeps visitors coming back	16%	11%	19%	11%	11%	25%
Leave no trace / leave it as you found it / no litter	11%	5%	8%	14%	14%	12%
Good visitor experience (easy, enjoyable, lots to offer)	9%	5%	9%	10%	11%	9%
Benefiting / respecting local communities	9%	5%	10%	9%	9%	6%
Eco-friendly / green / recycling / less waste	8%	5%	9%	5%	11%	11%

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

Base: boaters who provided a response (n=961). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

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

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

Mentions of each theme on this slide are 11% or lower for every traveller type.

Meaning	Overall (n=961)	Partners (n=86)	Younger Families (n=294)	Older Families (n=316)	Younger Friends (n=84)	Older Friends (n=165)
Respectful / responsible / mindful travel	7%	3%	8%	7%	10%	7%
For future generations / so others can enjoy it later	6%	2%	6%	6%	4%	11%
Supporting the local economy / businesses	6%	3%	9%	5%	2%	9%
Lower emissions / fuel / energy use	4%	7%	4%	3%	2%	4%
Affordable / budget travel	3%	0%	4%	3%	3%	5%
Responsible use of natural resources	3%	4%	3%	1%	2%	7%
Respecting local culture / heritage	3%	2%	4%	3%	2%	2%

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

Base: boaters who provided a response (n=961). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

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

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

Partners are the most likely to give a general positive response (11%).

Meaning	Overall (n=961)	Partners (n=86)	Younger Families (n=294)	Older Families (n=316)	Younger Friends (n=84)	Older Friends (n=165)
Protecting wildlife and habitats	2%	3%	3%	2%	3%	2%
Balancing visitors, environment and community	2%	1%	2%	3%	3%	2%
Travelling / exploring / touring (term read literally)	2%	1%	2%	2%	2%	2%
General positive / vague	7%	11%	8%	8%	1%	3%
Other	6%	6%	7%	6%	5%	4%

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

Base: boaters who provided a response (n=961). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – MARKET

All boaters

More than eight in ten boaters say supporting local businesses (87%), conservation (86%), community benefit (84%) and minimal environmental impact (83%) are important when choosing a destination.

Rest of Canada boaters place less importance than other markets on learning about Indigenous culture and history (36%), while U.S. Drive (72%) and U.S. Fly (81%) boaters place more.

Ontario boaters place less importance on accessibility for people with mobility or physical needs (45%).

Consideration	Overall (n=965)	Ontario (n=98)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Supporting local, independently owned businesses	87%	85%	83%	88%	90%
Conservation and responsible resource management	86%	82%	81%	88%	87%
Community benefit – tourism dollars staying in the local community	84%	82%	80%	85%	87%
Minimal environmental impact of tourism in the area	83%	80%	82%	84%	85%
Learning about Indigenous culture and history	65%	50%	36% ▼	72% ▲	81% ▲
Accessibility for people with mobility or physical needs	63%	45% ▼	53%	66%	70%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters, excluding “Don’t know”; bases vary by item (n=960 to 965). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? TOP2 = % somewhat or very important.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger families place more importance than other traveller types on learning about Indigenous culture and history (73%).

The top four considerations are rated important by 80% or more of every traveller type.

Consideration	Overall (n=965)	Partners (n=85)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Supporting local, independently owned businesses	87%	89%	89%	81%	89%	90%
Conservation and responsible resource management	86%	86%	89%	86%	80%	85%
Community benefit – tourism dollars staying in the local community	84%	84%	83%	83%	84%	85%
Minimal environmental impact of tourism in the area	83%	82%	86%	81%	85%	81%
Learning about Indigenous culture and history	65%	55%	73% ▲	64%	64%	60%
Accessibility for people with mobility or physical needs	63%	46%	69%	62%	61%	63%

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

Base: all boaters, excluding “Don’t know”; bases vary by item (n=960 to 965). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? TOP2 = % somewhat or very important.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (1 OF 2)

All boaters

Nine in ten boaters (90%) feel a personal responsibility to protect the natural environments they visit, and about eight in ten are interested in contributing to wildlife conservation (81%).

U.S. Fly boaters are more interested than other markets in an Indigenous-led guided experience (86%), while Ontario boaters are less interested (46%).

Statement	Overall (n=964)	Ontario (n=98)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
I feel a personal responsibility to protect natural environments I visit	90%	86%	93%	90%	89%
I am interested in contributing to wildlife conservation when I travel	81%	72%	77%	82%	88%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	77%	69%	78%	77%	87%
I would be interested in an Indigenous-led guided experience	70%	46% ▼	60%	74%	86% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters, excluding “Don’t know”; bases vary by item (n=956 to 964). V2 (TOP2) To what extent do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (2 OF 2)

All boaters

About two-thirds of boaters would pay more for a trip with a clear conservation benefit (69%) or actively seek out eco-friendly travel options (68%), and 63% look for operators with a recognized environmental or sustainability certification.

U.S. Drive boaters are more likely than other markets to say they would pay more for a clear conservation benefit (74%), while Rest of Canada boaters are less likely (51%).

Statement	Overall (n=964)	Ontario (n=98)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
I would pay more for a trip that had a clear conservation benefit	69%	57%	51% ▼	74% ▲	77%
I actively seek out eco-friendly or sustainable travel options	68%	57%	60%	71%	76%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	63%	60%	50%	65%	74%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters, excluding “Don’t know”; bases vary by item (n=956 to 964). V2 (TOP2) To what extent do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

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

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in contributing to wildlife conservation (87%) and in an Indigenous-led guided experience (77%).

Agreement with personal responsibility is high for every traveller type (88% to 92%).

Statement	Overall (n=964)	Partners (n=85)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
I feel a personal responsibility to protect natural environments I visit	90%	89%	88%	90%	92%	90%
I am interested in contributing to wildlife conservation when I travel	81%	78%	87% ▲	77%	84%	75%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	77%	74%	81%	74%	81%	75%
I would be interested in an Indigenous-led guided experience	70%	65%	77% ▲	70%	73%	62%

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

Base: all boaters, excluding “Don’t know”; bases vary by item (n=956 to 964). V2 (TOP2) To what extent do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

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

All boaters | Traveller types are defined on slide 10

Younger families are also more likely to actively look for certified accommodation or operators (72%).

Partners are the least likely to look for certified operators (49%).

Statement	Overall (n=964)	Partners (n=85)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
I would pay more for a trip that had a clear conservation benefit	69%	59%	73%	71%	63%	66%
I actively seek out eco-friendly or sustainable travel options	68%	59%	72%	69%	68%	65%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	63%	49%	72% ▲	62%	66%	56%

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

Base: all boaters, excluding “Don’t know”; bases vary by item (n=956 to 964). V2 (TOP2) To what extent do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.



AWARENESS & PERCEPTION

AWARENESS OF NORTHERN ONTARIO – MARKET

Boaters who do not live in Northern Ontario

Nearly nine in ten boaters know a lot (39%) or a little (48%) about Northern Ontario. One in ten (10%) have heard of it but know nothing about it, and 2% have never heard of it.

Ontario boaters are more likely than other markets to know a lot about Northern Ontario (58%).

Awareness	Overall (n=961)	Ontario (n=94)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
I have heard of and know a lot about it	39%	58% ▲	34%	37%	43%
I have heard of and know a little bit about it	48%	37%	52%	50%	43%
I have heard of but know nothing about it	10%	5%	11%	11%	12%
I have never heard of before	2%	0%	3%	2%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who do not live in Northern Ontario (n=961). N0 How would you best describe your awareness of Northern Ontario?

AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to know a lot about Northern Ontario (49%) and less likely to know only a little (41%).

Older friend groups are the least likely to know a lot (29%).

Awareness	Overall (n=961)	Partners (n=85)	Younger Families (n=294)	Older Families (n=317)	Younger Friends (n=84)	Older Friends (n=165)
I have heard of and know a lot about it	39%	32%	49% ▲	38%	38%	29%
I have heard of and know a little bit about it	48%	54%	41% ▼	51%	46%	54%
I have heard of but know nothing about it	10%	13%	9%	8%	15%	14%
I have never heard of before	2%	1%	1%	3%	0%	3%

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

Base: boaters who do not live in Northern Ontario (n=961). N0 How would you best describe your awareness of Northern Ontario?

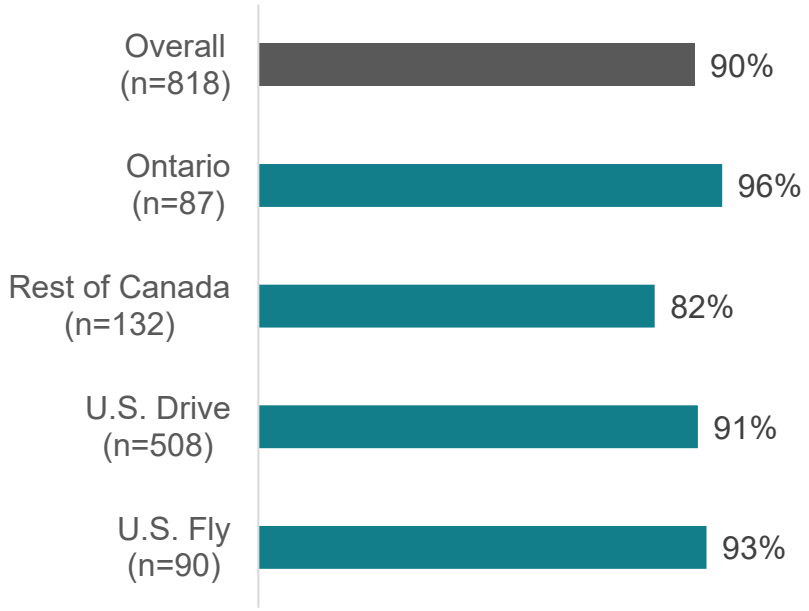
RATING OF NORTHERN ONTARIO FOR BOATING

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

Nine in ten boaters who know Northern Ontario (90%) rate it 4 or 5 out of 5 as a pleasure travel destination for boating, including 51% who rate it excellent.

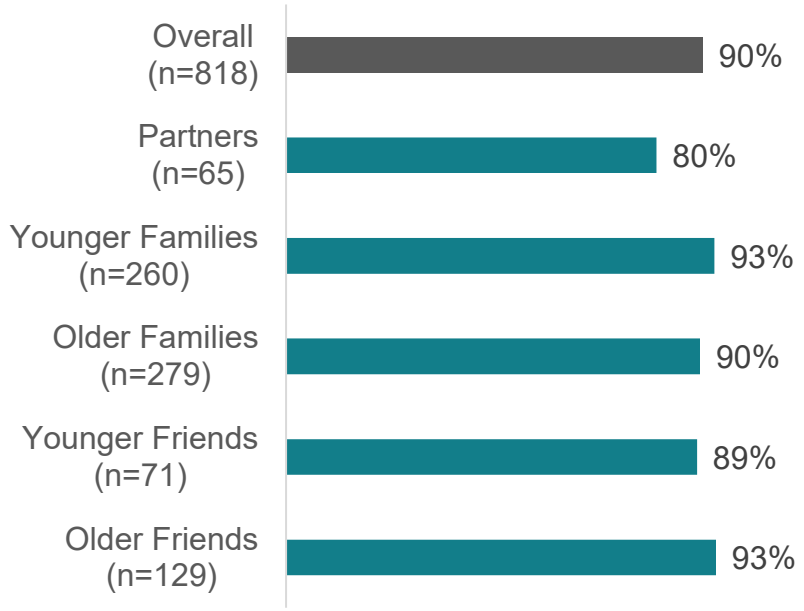
Ratings range from 82% among Rest of Canada boaters to 96% among Ontario boaters, and from 80% among partners to 93% among younger families and older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: boaters who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=818). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for boating? TOP2 = % rating 4 or 5 (1 = Poor, 5 = Excellent).

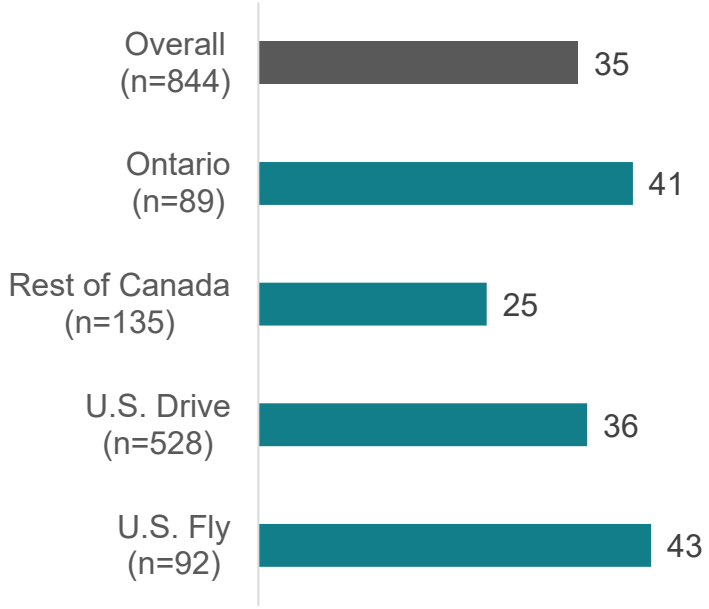
LIKELIHOOD TO RECOMMEND NORTHERN ONTARIO (NPS)

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

Northern Ontario has a Net Promoter Score (NPS) of 35 among boaters who know it, with 51% promoters and 16% detractors.

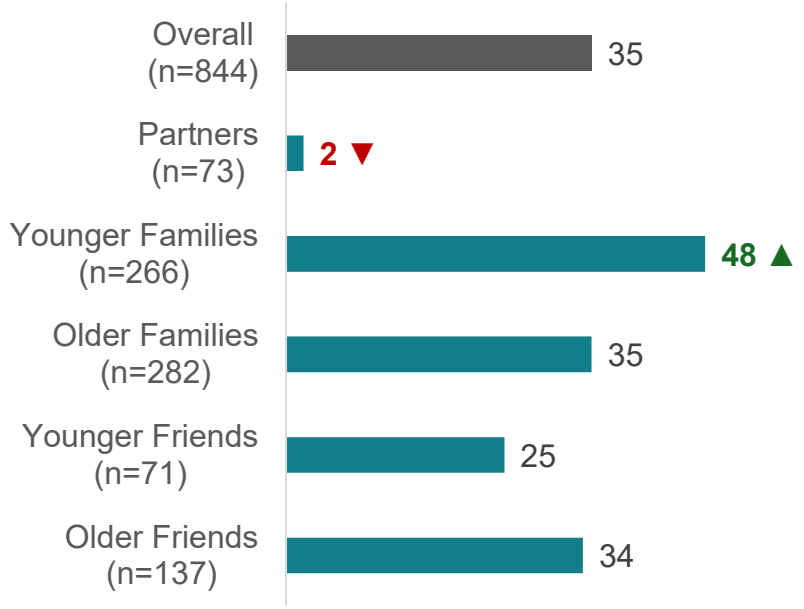
NPS ranges from 25 among Rest of Canada boaters to 43 among U.S. Fly boaters. Younger families have a higher NPS than other traveller types (48), while partners have a much lower NPS (2), with almost as many detractors (32%) as promoters (34%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: boaters who know a lot or a little about Northern Ontario (n=844). N2 (NPS) How likely would you be to recommend Northern Ontario to a friend or colleague as a destination for boating? (0 = Not at all likely, 10 = Extremely likely) NPS = % promoters (9–10) minus % detractors (0–6).

PERCEPTIONS OF NORTHERN ONTARIO – MARKET

Boaters who know a lot or a little about Northern Ontario

Nine in ten boaters who know Northern Ontario agree it offers a wide variety of routes, trails or waterways (91%) and excellent boating experiences (90%), feels welcoming (90%) and is a destination they would seriously consider (90%).

Fewer agree they know enough to plan a boating trip there (77%) or that Northern Ontario is better than alternatives closer to home (72%).

Rest of Canada boaters are less likely than other markets to say they would seriously consider Northern Ontario (78%), while U.S. Drive boaters are more likely (93%).

Statement	Overall (n=840)	Ontario (n=88)	Rest of Canada (n=135)	U.S. Drive (n=525)	U.S. Fly (n=92)
Northern Ontario offers a wide variety of routes, trails, or waterways for boating	91%	91%	86%	92%	92%
Northern Ontario offers excellent boating experiences	90%	91%	83%	92%	90%
Northern Ontario feels welcoming to travellers like me	90%	93%	87%	90%	90%
Northern Ontario is a destination I would seriously consider for boating	90%	88%	78% ▼	93% ▲	93%
I know enough about Northern Ontario to plan a boating trip there	77%	82%	65%	80%	73%
For boating, Northern Ontario is better than alternatives I could choose closer to home	72%	72%	58%	75%	72%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=826 to 840). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

PERCEPTIONS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Perceptions are similar across traveller types, with no significant differences.

Younger friend groups are the most likely to say they would seriously consider Northern Ontario (95%) and that it is better than alternatives closer to home (80%).

Statement	Overall (n=840)	Partners (n=71)	Younger Families (n=265)	Older Families (n=282)	Younger Friends (n=71)	Older Friends (n=137)
Northern Ontario offers a wide variety of routes, trails, or waterways for boating	91%	89%	92%	92%	90%	90%
Northern Ontario offers excellent boating experiences	90%	89%	92%	89%	91%	90%
Northern Ontario feels welcoming to travellers like me	90%	89%	92%	92%	91%	83%
Northern Ontario is a destination I would seriously consider for boating	90%	82%	90%	90%	95%	90%
I know enough about Northern Ontario to plan a boating trip there	77%	75%	82%	75%	75%	73%
For boating, Northern Ontario is better than alternatives I could choose closer to home	72%	70%	76%	68%	80%	68%

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

Base: boaters who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=826 to 840). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – MARKET

Boaters who know a lot or a little about Northern Ontario

Nine in ten or more boaters who know Northern Ontario agree it has pristine lakes and waterways (94%), authentic campfire and wilderness experiences (92%), excellent boating waters and marinas (92%) and remote, untouched wilderness (91%).

Good value for money is the lowest-rated attribute (82%), ranging from 73% among Rest of Canada boaters to 85% among U.S. Drive boaters. None of the market differences are significant.

Northern Ontario has…	Overall (n=837)	Ontario (n=88)	Rest of Canada (n=135)	U.S. Drive (n=525)	U.S. Fly (n=89)
Pristine lakes and waterways	94%	95%	95%	93%	97%
Authentic campfire and wilderness experiences	92%	89%	95%	92%	90%
Excellent boating waters and marinas	92%	89%	87%	93%	95%
Remote, untouched wilderness	91%	89%	91%	91%	91%
Friendly and welcoming local communities	90%	94%	85%	91%	89%
Opportunities to see the Northern Lights (Aurora Borealis)	90%	93%	90%	89%	92%
Dark skies ideal for stargazing	89%	95%	88%	87%	94%
Rich Indigenous culture and heritage	85%	80%	76%	86%	94%
Good value for money	82%	75%	73%	85%	84%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=796 to 837). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – TRAVELLER TYPE

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

Agreement is high across traveller types, with no significant differences.

Older families are the most likely to agree Northern Ontario has friendly and welcoming local communities (95%).

Northern Ontario has…	Overall (n=837)	Partners (n=71)	Younger Families (n=265)	Older Families (n=280)	Younger Friends (n=71)	Older Friends (n=137)
Pristine lakes and waterways	94%	95%	94%	95%	91%	93%
Authentic campfire and wilderness experiences	92%	88%	94%	92%	91%	91%
Excellent boating waters and marinas	92%	89%	93%	92%	91%	92%
Remote, untouched wilderness	91%	85%	91%	90%	92%	92%
Friendly and welcoming local communities	90%	87%	90%	95%	87%	88%
Opportunities to see the Northern Lights (Aurora Borealis)	90%	93%	91%	90%	86%	85%
Dark skies ideal for stargazing	89%	86%	90%	91%	87%	83%
Rich Indigenous culture and heritage	85%	83%	87%	86%	84%	80%
Good value for money	82%	79%	83%	80%	87%	83%

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

Base: boaters who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=796 to 837). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… TOP2 = % somewhat or strongly agree.

VIEW OF A TRIP TO NORTHERN ONTARIO – MARKET

All boaters | Includes past visitors to Northern Ontario

Seven in ten boaters (72%) view Northern Ontario as a destination of choice for boating, somewhere they would specifically seek out, while a quarter (25%) see it as a destination of convenience.

Rest of Canada boaters are the most likely to see it as a destination of convenience (34%), although market differences are not significant.

View of a trip	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
A destination of choice – somewhere I would specifically seek out for boating	72%	72%	62%	74%	75%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	25%	25%	34%	24%	20%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). N10 Which of the following best describes how you would view a boating trip to Northern Ontario?

"Not sure" (3%) not shown.

VIEW OF A TRIP TO NORTHERN ONTARIO – TRAVELLER TYPE

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

A destination of choice is the most common view for every traveller type, from 61% among partners to 75% among younger families.

Partners (34%) and younger friend groups (32%) are the most likely to see it as a destination of convenience.

View of a trip	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
A destination of choice – somewhere I would specifically seek out for boating	72%	61%	75%	74%	67%	74%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	25%	34%	24%	23%	32%	23%

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

Base: all boaters (n=967). N10 Which of the following best describes how you would view a boating trip to Northern Ontario?

"Not sure" (3%) not shown.



FUTURE DEMAND & EXPERIENCES

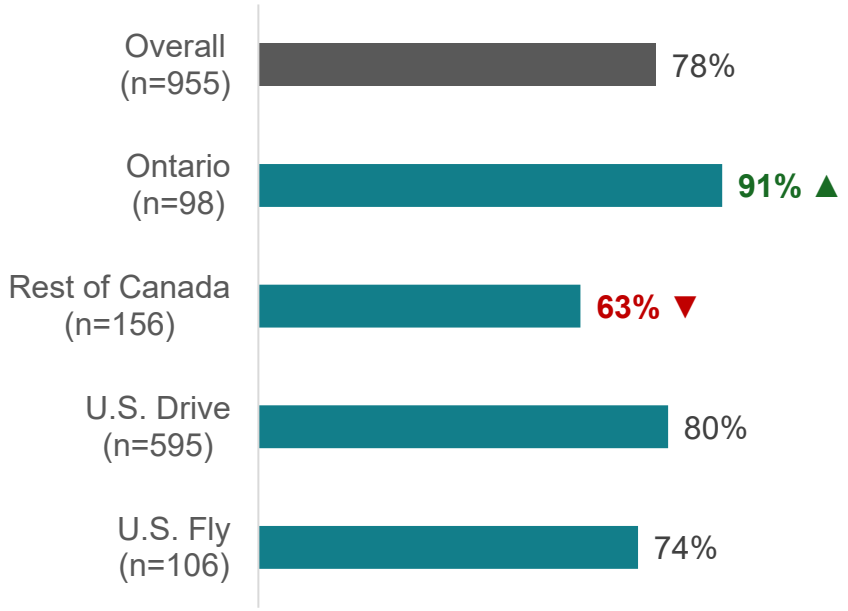
LIKELIHOOD TO VISIT NORTHERN ONTARIO IN THE NEXT 2 YEARS

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

Nearly eight in ten boaters (78%) are likely to visit Northern Ontario for a boating trip in the next two years, including 47% who are very likely.

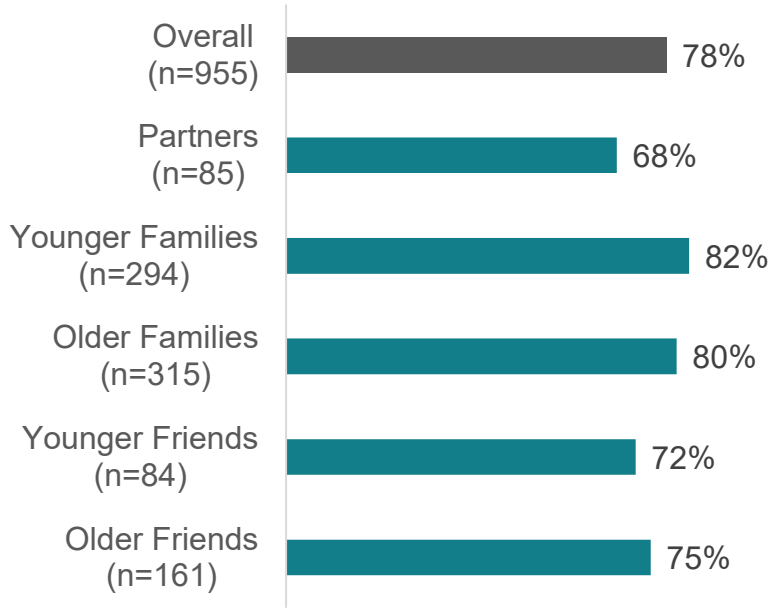
Likelihood is higher among Ontario boaters (91%) and lower among Rest of Canada boaters (63%). Among traveller types, it ranges from 68% among partners to 82% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters, excluding “Don’t know” (n=955). N4 (TOP2) How likely are you to visit Northern Ontario for a boating trip in the next 2 years?
TOP2 = % somewhat or very likely.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – MARKET

All boaters | Includes past visitors to Northern Ontario

Half of boaters (48%) would make Northern Ontario the primary destination of a boating trip, with brief stops elsewhere, and 29% would make it the only destination.

Making it the only destination ranges from 23% among Rest of Canada boaters to 31% among Ontario boaters, with no significant market differences.

Role of Northern Ontario	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
It would be the only destination of the trip	29%	31%	23%	30%	27%
It would be the primary destination, with brief stops elsewhere	48%	53%	47%	48%	50%
It would be one of several equal destinations	18%	13%	22%	18%	18%
It would be a secondary stop on a trip focused elsewhere	3%	2%	6%	3%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). N5 If you were to visit Northern Ontario for boating, which of the following best describes the role it would play in your trip?

"Not sure" (2%) not shown.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – TRAVELLER TYPE

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

Younger friend groups are the least likely to make Northern Ontario the only destination of their trip (20%) and the most likely to see it as a secondary stop (9%).

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
It would be the only destination of the trip	29%	34%	27%	29%	20%	32%
It would be the primary destination, with brief stops elsewhere	48%	44%	51%	46%	56%	49%
It would be one of several equal destinations	18%	15%	19%	21%	14%	17%
It would be a secondary stop on a trip focused elsewhere	3%	4%	1%	2%	9%	2%

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

Base: all boaters (n=967). N5 If you were to visit Northern Ontario for boating, which of the following best describes the role it would play in your trip?

"Not sure" (2%) not shown.

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

All boaters | Includes past visitors to Northern Ontario

Nine in ten boaters say the quality of routes, trails or waterways (91%), safety and reliability (91%) and access to nature and wilderness (90%) are important when deciding whether to visit Northern Ontario, and 87% to 89% say the same of each of the other factors on this slide.

Ontario boaters place less importance than other markets on access to nature (78%) and on clear, manageable licensing or permit requirements (76%). U.S. Drive boaters place more importance on licensing requirements (92%) and on the quality of accommodation options (91%).

Factor	Overall (n=965)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=604)	U.S. Fly (n=105)
Quality/condition of routes, trails, or waterways for boating (e.g., road/trail surface, grooming, water conditions)	91%	88%	88%	92%	92%
Safety and reliability of the destination	91%	85%	89%	92%	91%
Access to nature and wilderness	90%	78% ▼	88%	92%	89%
Ability to get away from it all	89%	85%	83%	91%	90%
Licensing, registration or permit requirements that are clear and manageable	89%	76% ▼	83%	92% ▲	90%
Variety and range of boating routes or areas available	88%	84%	81%	91%	90%
Travel time and ease of access	88%	77%	84%	90%	88%
Cost and overall affordability	87%	80%	87%	88%	90%
Quality of accommodation options	87%	79%	76%	91% ▲	90%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters, excluding “Don’t know”; bases vary by item (n=958 to 965). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for boating? TOP2 = % somewhat or very important.

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

All boaters | Includes past visitors to Northern Ontario

Fewer say activity-specific infrastructure (85%), reputation (84%), accommodation availability (84%), activities for non-boating companions (77%), connectivity (75%), outfitters or guides (67%), Indigenous cultural experiences (60%) or boating events (44%) are important.

U.S. Drive (67%) and U.S. Fly (75%) boaters place more importance on Indigenous cultural experiences, while Rest of Canada boaters place less importance on Indigenous experiences (31%) and connectivity (58%). Ontario boaters place less importance on accommodation availability during the times they want to visit (68%).

Factor	Overall (n=965)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=604)	U.S. Fly (n=105)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	85%	74%	81%	88%	86%
Strong reputation or positive word of mouth	84%	77%	83%	86%	87%
More accommodation available during the times I want to visit	84%	68% ▼	80%	87%	90%
Availability of activities for non-boating travel companions	77%	67%	73%	78%	82%
Cell phone or internet connectivity at the destination	75%	78%	58% ▼	78%	82%
Availability of outfitters, guides, or operators	67%	56%	52%	70%	77%
Indigenous cultural experiences	60%	44%	31% ▼	67% ▲	75% ▲
Boating events or competitions	44%	34%	36%	45%	55%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters, excluding “Don’t know”; bases vary by item (n=958 to 965). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for boating? TOP2 = % somewhat or very important.

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

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

The most important factors are rated important by three-quarters or more of every traveller type, with no significant differences.

Partners rate most of these factors lowest, from 77% to 86%.

Factor	Overall (n=965)	Partners (n=87)	Younger Families (n=295)	Older Families (n=317)	Younger Friends (n=84)	Older Friends (n=165)
Quality/condition of routes, trails, or waterways for boating (e.g., road/trail surface, grooming, water conditions)	91%	84%	90%	92%	92%	95%
Safety and reliability of the destination	91%	81%	94%	91%	89%	91%
Access to nature and wilderness	90%	80%	91%	89%	93%	93%
Ability to get away from it all	89%	83%	90%	88%	88%	94%
Licensing, registration or permit requirements that are clear and manageable	89%	80%	91%	88%	89%	90%
Variety and range of boating routes or areas available	88%	83%	92%	86%	91%	89%
Travel time and ease of access	88%	77%	89%	88%	86%	89%
Cost and overall affordability	87%	86%	87%	88%	89%	85%
Quality of accommodation options	87%	83%	89%	86%	86%	87%

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

Base: all boaters, excluding “Don’t know”; bases vary by item (n=958 to 965). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for boating? TOP2 = % somewhat or very important.

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

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

Younger families place more importance than other traveller types on outfitters, guides or operators (75%), Indigenous cultural experiences (68%) and boating events or competitions (54%).

Partners place less importance on activity-specific infrastructure (70%), and older friend groups on boating events or competitions (27%).

Factor	Overall (n=965)	Partners (n=87)	Younger Families (n=295)	Older Families (n=317)	Younger Friends (n=84)	Older Friends (n=165)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	85%	70% ▼	87%	85%	92%	90%
Strong reputation or positive word of mouth	84%	75%	84%	85%	83%	89%
More accommodation available during the times I want to visit	84%	77%	88%	83%	88%	83%
Availability of activities for non-boating travel companions	77%	77%	80%	76%	78%	71%
Cell phone or internet connectivity at the destination	75%	67%	79%	75%	71%	77%
Availability of outfitters, guides, or operators	67%	64%	75% ▲	62%	62%	66%
Indigenous cultural experiences	60%	57%	68% ▲	58%	60%	51%
Boating events or competitions	44%	43%	54% ▲	41%	49%	27% ▼

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

Base: all boaters, excluding “Don’t know”; bases vary by item (n=958 to 965). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for boating? TOP2 = % somewhat or very important.

PREFERRED ACCESS TYPES – MARKET

All boaters

Eight in ten boaters (80%) prefer road-accessible areas for a boating trip to Northern Ontario, and nearly half (48%) prefer remote boat-in access. Fewer prefer fly-in or float plane (20%) or train-in access (13%).

U.S. Fly boaters are more likely than other markets to prefer remote boat-in (62%) and train-in access (22%), while Ontario boaters are less likely to prefer fly-in or float plane access (7%).

Access type	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Road-accessible areas	80%	85%	80%	78%	80%
Remote boat-in access	48%	41%	35%	50%	62% ▲
Fly-in or float plane access	20%	7% ▼	13%	23%	29%
Train-in access	13%	8%	5%	14%	22% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). N7 For a boating trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (4%) not shown.

PREFERRED ACCESS TYPES – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer remote boat-in access (57%) and fly-in or float plane access (28%).

Road-accessible areas are preferred by 78% to 82% of every traveller type.

Access type	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Road-accessible areas	80%	78%	80%	79%	80%	82%
Remote boat-in access	48%	36%	57% ▲	43%	49%	47%
Fly-in or float plane access	20%	12%	28% ▲	14%	24%	20%
Train-in access	13%	13%	16%	11%	15%	8%

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

Base: all boaters (n=967). N7 For a boating trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (4%) not shown.

PREFERRED LODGING OPTIONS – MARKET (1 OF 2)

All boaters

Boaters' lodging preferences are spread across several options, led by short-term rentals (45%), drive-in lodges or resorts (44%), private cottages (42%) and commercial cottage or cabin rentals (42%).

U.S. Fly boaters show the highest preference for most of these options, while Ontario boaters are the most likely to prefer private cottages (50%). None of the market differences are significant.

Lodging option	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Short-term rental (e.g., AirBnB, Vrbo)	45%	31%	39%	47%	52%
Drive-in lodge or resort	44%	34%	39%	46%	49%
Private cottage (owned or borrowed)	42%	50%	46%	40%	39%
Commercial cottage or cabin rental	42%	37%	37%	44%	44%
Hotel or motel	40%	39%	30%	42%	51%
Designated campground (private or provincial park)	35%	35%	38%	33%	46%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). N8 Which of the following lodging options would you prefer on a boating trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

PREFERRED LODGING OPTIONS – MARKET (2 OF 2)

All boaters

A third of boaters (34%) would prefer to stay at a marina or dockage, and 31% prefer backcountry or wilderness camping.

Staying at the home of friends or relatives is preferred most by Ontario boaters (24%). None of the market differences are significant.

Lodging option	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Marina or dockage	34%	37%	25%	35%	38%
Backcountry or wilderness camping	31%	23%	35%	30%	35%
Home of friends or relatives (unpaid)	16%	24%	17%	14%	20%
Fly-in or remote outpost camp	13%	10%	7%	14%	17%
Other	1%	4%	1%	<1%	<1%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). N8 Which of the following lodging options would you prefer on a boating trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

PREFERRED LODGING OPTIONS – TRAVELLER TYPE (1 OF 2)

All boaters | Traveller types are defined on slide 10

Older friend groups show the highest preference for commercial cottage or cabin rentals (58%), and partners the lowest preference for designated campgrounds (15%).

None of the traveller type differences are significant.

Lodging option	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Short-term rental (e.g., AirBnB, Vrbo)	45%	36%	53%	38%	47%	46%
Drive-in lodge or resort	44%	37%	40%	45%	52%	50%
Private cottage (owned or borrowed)	42%	34%	40%	43%	42%	48%
Commercial cottage or cabin rental	42%	29%	40%	39%	39%	58%
Hotel or motel	40%	45%	46%	35%	41%	39%
Designated campground (private or provincial park)	35%	15%	40%	38%	39%	31%

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

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

Base: all boaters (n=967). N8 Which of the following lodging options would you prefer on a boating trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

PREFERRED LODGING OPTIONS – TRAVELLER TYPE (2 OF 2)

All boaters | Traveller types are defined on slide 10

Partners are the least likely to prefer a marina or dockage (19%) or backcountry camping (15%).

None of the traveller type differences are significant.

Lodging option	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Marina or dockage	34%	19%	36%	37%	25%	35%
Backcountry or wilderness camping	31%	15%	35%	28%	29%	39%
Home of friends or relatives (unpaid)	16%	9%	20%	14%	26%	13%
Fly-in or remote outpost camp	13%	15%	13%	10%	6%	20%
Other	1%	2%	0%	1%	1%	1%

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

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

Base: all boaters (n=967). N8 Which of the following lodging options would you prefer on a boating trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

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

Boaters who have visited Northern Ontario in the past 5 years

Better value for money (33%), better availability of quality paid accommodation (31%) and more things to do for travel companions (30%) would most encourage past-five-year visitors to spend more nights in Northern Ontario.

Better availability of quality paid accommodation is cited most by U.S. Fly visitors (43%), and better connectivity by Ontario visitors (35%). None of the market differences are significant.

Factor	Overall (n=606)	Ontario (n=77)	Rest of Canada (n=101)	U.S. Drive (n=368)	U.S. Fly (n=59)
Better value for money overall	33%	24%	34%	35%	33%
Better availability of quality paid accommodation (lodges, hotels, cottages)	31%	32%	23%	31%	43%
More things to do beyond boating for my travel companions	30%	37%	24%	31%	30%
Better cell or internet connectivity	28%	35%	17%	29%	27%
Improved road, trail, or water access infrastructure	25%	22%	17%	28%	26%
Better marina and docking facilities	25%	18%	22%	26%	30%
More packaged or all-inclusive experiences	24%	25%	17%	26%	25%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. “Not sure” (2%) not shown.

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

Boaters who have visited Northern Ontario in the past 5 years

About one in five would stay longer with more accommodation available when they want to visit (21%) or secure equipment storage (19%), and 13% are already satisfied with the length of their stays.

U.S. Fly visitors show the highest interest in a guided multi-stop itinerary (26%) and Indigenous cultural experiences (24%).

Factor	Overall (n=606)	Ontario (n=77)	Rest of Canada (n=101)	U.S. Drive (n=368)	U.S. Fly (n=59)
More accommodation available during the times I want to visit	21%	20%	13%	23%	23%
Better availability of secure equipment or vehicle storage	19%	14%	21%	19%	23%
Events or competitions timed to my travel	15%	13%	7%	17%	22%
Indigenous cultural experiences	14%	15%	5%	15%	24%
A guided multi-stop itinerary combining activities or sub-regions	14%	9%	9%	15%	26%
Other	2%	2%	0%	2%	0%
Nothing – I am already satisfied with the length of my stays	13%	13%	9%	14%	15%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. “Not sure” (2%) not shown.

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

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

Partners are the most likely to say better marina and docking facilities would encourage longer stays (41%), and older friend groups better connectivity (46%).

None of the traveller type differences are significant.

Factor	Overall (n=606)	Partners (n=50)	Younger Families (n=217)	Older Families (n=197)	Younger Friends (n=52)	Older Friends (n=79)
Better value for money overall	33%	37%	33%	35%	40%	20%
Better availability of quality paid accommodation (lodges, hotels, cottages)	31%	21%	32%	26%	40%	40%
More things to do beyond boating for my travel companions	30%	27%	31%	29%	41%	28%
Better cell or internet connectivity	28%	28%	28%	22%	26%	46%
Improved road, trail, or water access infrastructure	25%	28%	24%	27%	32%	17%
Better marina and docking facilities	25%	41%	26%	25%	22%	12%
More packaged or all-inclusive experiences	24%	6%	24%	24%	28%	33%

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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. “Not sure” (2%) not shown.

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

Boaters 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 name another factor (8%).

Older families are the most likely to be already satisfied with the length of their stays (17%).

Factor	Overall (n=606)	Partners (n=50)	Younger Families (n=217)	Older Families (n=197)	Younger Friends (n=52)	Older Friends (n=79)
More accommodation available during the times I want to visit	21%	18%	27%	17%	28%	12%
Better availability of secure equipment or vehicle storage	19%	14%	24%	19%	17%	10%
Events or competitions timed to my travel	15%	11%	21%	10%	23%	8%
Indigenous cultural experiences	14%	12%	17%	11%	21%	14%
A guided multi-stop itinerary combining activities or sub-regions	14%	6%	16%	19%	12%	4%
Other	2%	0%	1%	1%	0%	8% ▲
Nothing – I am already satisfied with the length of my stays	13%	9%	11%	17%	7%	11%

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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. “Not sure” (2%) not shown.



BARRIERS & COMPETITION

BARRIERS TO VISITING NORTHERN ONTARIO – MARKET (1 OF 4)

All boaters | Includes past visitors to Northern Ontario

Cost (37%) is the most common barrier to visiting or returning to Northern Ontario for boating, followed by wildfires and other environmental disruptions (31%), high transportation costs (31%) and unfavourable weather or season timing (30%).

Ontario boaters are more likely than other markets to be discouraged by unfavourable weather or season timing (46%) and poor road, trail or water access (43%).

Rest of Canada boaters are more likely to be discouraged by poor value for money (44%), while U.S. Drive boaters are less likely (23%). Cost is highest among Rest of Canada boaters (52%).

Barrier	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Cost	37%	31%	52%	35%	35%
Wildfires, flooding, or other environmental disruptions	31%	37%	35%	30%	25%
High transportation costs (gas, airfare)	31%	26%	34%	31%	30%
Unfavourable weather or season timing	30%	46% ▲	31%	30%	21%
Poor value for money	27%	33%	44% ▲	23% ▼	20%
Poor road, trail, or water access	27%	43% ▲	29%	24%	24%
Concerns about safety	26%	31%	17%	28%	24%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for boating? Please select all that apply.

"Not sure" (5%) not shown.

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

BARRIERS TO VISITING NORTHERN ONTARIO – MARKET (2 OF 4)

All boaters | Includes past visitors to Northern Ontario

About one in five boaters are discouraged by complicated licensing requirements (24%), distance (22%), expensive licensing requirements (22%) or insects (20%).

Rest of Canada boaters are more likely than other markets to say Northern Ontario is too far to drive (39%), while U.S. Drive boaters are less likely (18%). Ontario boaters are more likely to be discouraged by insects (36%).

Among U.S. boaters, 28% of U.S. Drive and 14% of U.S. Fly boaters cite anti-American sentiment.

Barrier	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Complicated licensing, registration, or permit requirements	24%	21%	20%	26%	20%
Too far to drive	22%	22%	39% ▲	18% ▼	25%
Expensive licensing, registration, or permit requirements	22%	22%	19%	22%	24%
Insects (e.g., blackflies, mosquitoes)	20%	36% ▲	19%	20%	11%
Lack of amenities or services at the destination	19%	29%	20%	18%	17%
Anti-American sentiment	19%	–	–	28%	14%
Limited accommodation options	19%	19%	24%	18%	17%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for boating? Please select all that apply.

"Not sure" (5%) not shown.

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

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

BARRIERS TO VISITING NORTHERN ONTARIO – MARKET (3 OF 4)

All boaters | Includes past visitors to Northern Ontario

Fewer than one in five boaters are discouraged by each of the barriers on this slide, including limited marina or dockage capacity (17%) and poor connectivity (17%).

Among U.S. boaters, about one in five cite concerns about crossing the Canada-US border (22% of U.S. Drive and 21% of U.S. Fly boaters).

Barrier	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Unfamiliar or unclear regulations	18%	28%	14%	17%	17%
Limited marina or dockage capacity	17%	21%	13%	17%	18%
Poor or unreliable cell phone or internet connectivity	17%	25%	14%	15%	19%
Concerns about crossing the Canada-US border	16%	–	–	22%	21%
Vehicle registration or insurance requirements across jurisdictions	12%	11%	11%	12%	16%
Difficulty finding reliable trip planning information	12%	12%	7%	13%	12%
Too remote or rugged for my comfort level	12%	19%	15%	10%	13%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for boating? Please select all that apply.

"Not sure" (5%) not shown.

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

BARRIERS TO VISITING NORTHERN ONTARIO – MARKET (4 OF 4)

All boaters | Includes past visitors to Northern Ontario

About one in ten boaters or fewer cite a lack of secure storage (11%), campsite or RV site availability (10%), not knowing enough about Northern Ontario's boating opportunities (8%) or doubts about boating quality (7%).

Ontario boaters are more likely than other markets to doubt the boating quality would meet their expectations (16%).

Barrier	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Lack of secure equipment or vehicle storage	11%	15%	7%	12%	8%
Availability of campsites or RV sites	10%	7%	16%	9%	8%
I do not know enough about Northern Ontario's boating opportunities	8%	4%	8%	9%	6%
Not sure the boating quality would meet my expectations	7%	16% ▲	8%	6%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for boating? Please select all that apply.

"Not sure" (5%) not shown.

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

BARRIERS TO VISITING NORTHERN ONTARIO – TRAVELLER TYPE (1 OF 4)

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

Older friend groups are the most likely to be discouraged by cost (49%), wildfires and other environmental disruptions (43%) and high transportation costs (41%).

Younger families are less likely than other traveller types to be discouraged by unfavourable weather or season timing (23%). None of the other traveller type differences on this slide are significant.

Barrier	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Cost	37%	27%	31%	39%	44%	49%
Wildfires, flooding, or other environmental disruptions	31%	30%	29%	29%	25%	43%
High transportation costs (gas, airfare)	31%	17%	29%	31%	28%	41%
Unfavourable weather or season timing	30%	31%	23% ▼	35%	35%	32%
Poor value for money	27%	16%	23%	27%	36%	35%
Poor road, trail, or water access	27%	16%	22%	32%	26%	31%
Concerns about safety	26%	23%	23%	24%	34%	32%

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

Base: all boaters (n=967). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for boating? Please select all that apply.

"Not sure" (5%) not shown.

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

BARRIERS TO VISITING NORTHERN ONTARIO – TRAVELLER TYPE (2 OF 4)

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

Older friend groups are more likely than other traveller types to be discouraged by complicated licensing, registration or permit requirements (39%), while younger families are less likely (17%).

Older friend groups are also the most likely to cite anti-American sentiment (35%).

Barrier	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Complicated licensing, registration, or permit requirements	24%	29%	17% ▼	21%	22%	39% ▲
Too far to drive	22%	25%	18%	25%	26%	21%
Expensive licensing, registration, or permit requirements	22%	17%	18%	23%	21%	29%
Insects (e.g., blackflies, mosquitoes)	20%	25%	18%	22%	16%	21%
Lack of amenities or services at the destination	19%	18%	16%	24%	19%	17%
Anti-American sentiment	19%	18%	13%	20%	12%	35%
Limited accommodation options	19%	15%	19%	18%	21%	23%

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

Base: all boaters (n=967). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for boating? Please select all that apply.

"Not sure" (5%) not shown.

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

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

BARRIERS TO VISITING NORTHERN ONTARIO – TRAVELLER TYPE (3 OF 4)

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

Younger families are less likely than other traveller types to be discouraged by unfamiliar or unclear regulations (12%).

Limited marina or dockage capacity is cited most by older friend groups (26%) and least by partners (7%).

Barrier	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Unfamiliar or unclear regulations	18%	16%	12% ▼	21%	20%	25%
Limited marina or dockage capacity	17%	7%	16%	18%	9%	26%
Poor or unreliable cell phone or internet connectivity	17%	18%	16%	15%	13%	21%
Concerns about crossing the Canada-US border	16%	13%	16%	15%	16%	24%
Vehicle registration or insurance requirements across jurisdictions	12%	6%	12%	11%	17%	14%
Difficulty finding reliable trip planning information	12%	5%	12%	9%	14%	17%
Too remote or rugged for my comfort level	12%	8%	11%	13%	14%	10%

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

Base: all boaters (n=967). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for boating? Please select all that apply.

"Not sure" (5%) not shown.

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

BARRIERS TO VISITING NORTHERN ONTARIO – TRAVELLER TYPE (4 OF 4)

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

Older friend groups are more likely than other traveller types to be discouraged by a lack of secure equipment or vehicle storage (21%).

Each of the other barriers on this slide is cited by 15% or fewer in every traveller type.

Barrier	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Lack of secure equipment or vehicle storage	11%	5%	11%	9%	9%	21% ▲
Availability of campsites or RV sites	10%	3%	10%	8%	15%	12%
I do not know enough about Northern Ontario's boating opportunities	8%	8%	8%	6%	11%	11%
Not sure the boating quality would meet my expectations	7%	6%	6%	8%	6%	7%

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

Base: all boaters (n=967). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for boating? Please select all that apply.

"Not sure" (5%) not shown.

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

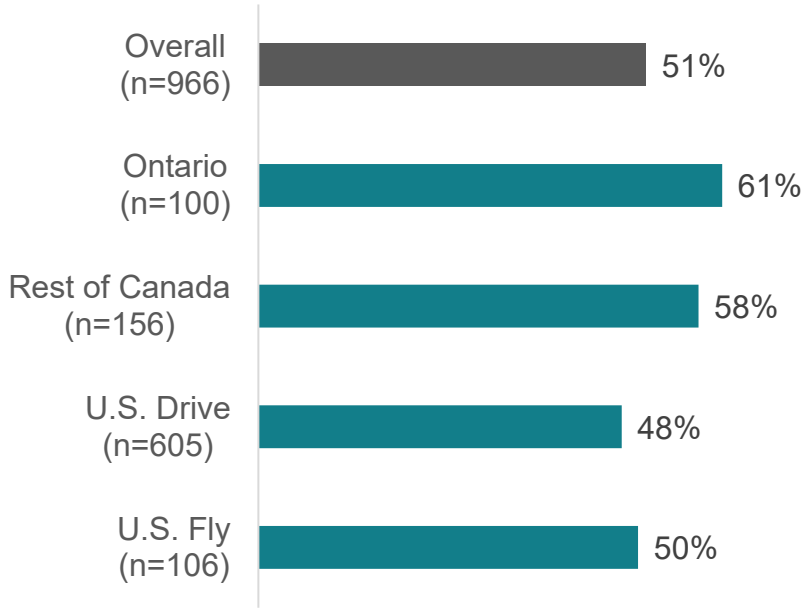
IMPACT OF FINANCIAL PRESSURES ON TRAVEL PLANS

All boaters | Traveller types are defined on slide 10

Half of boaters (51%) agree that financial pressures have impacted their travel plans in the next 12 months.

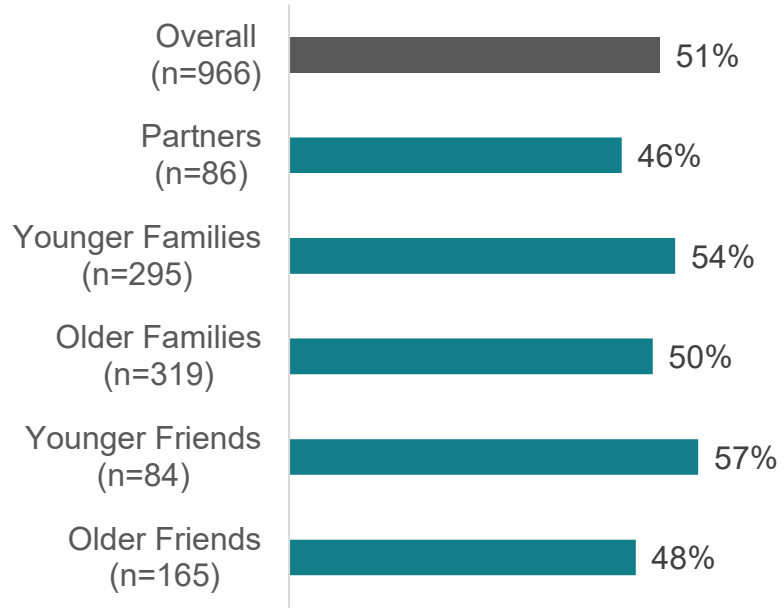
Agreement ranges from 48% among U.S. Drive boaters to 61% among Ontario boaters, and from 46% among partners to 57% among younger friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters, excluding “Don’t know” (n=966). BD1A (TOP2) How much do you agree or disagree with the following statement? “Financial pressures have impacted my travel plans in the next 12 months” TOP2 = % somewhat or strongly agree.

OTHER DESTINATIONS CONSIDERED – MARKET (1 OF 2)

All boaters

Michigan (33%) is the destination boaters most often consider instead of Northern Ontario, followed by somewhere else in Ontario (26%), British Columbia (24%), Minnesota (24%) and Wisconsin (24%).

Ontario boaters are more likely than other markets to consider somewhere else in Ontario (56%) and Quebec (38%), and Rest of Canada boaters British Columbia (54%), Alberta (40%) and Manitoba (29%).

U.S. Drive boaters most often consider Michigan (48%), Minnesota (35%) and Wisconsin (35%), while U.S. Fly boaters most often consider California (57%).

Destination	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Michigan	33%	–	–	48%	28%
Somewhere else in Ontario	26%	56% ▲	22%	23%	23%
British Columbia	24%	35%	54% ▲	15% ▼	21%
Minnesota	24%	–	–	35%	19%
Wisconsin	24%	–	–	35%	22%
Quebec	20%	38% ▲	21%	18%	15%
New York	18%	–	–	26%	13%
Alberta	16%	9%	40% ▲	11% ▼	12%
California	14%	–	–	12%	57%
Manitoba	14%	9%	29% ▲	11%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). BD2 What other destinations do you consider for boating trips?

"Not sure" (2%) not shown.

No Canadian respondents selected a U.S. state (– for Canadian markets); Overall and traveller type results for U.S. states are based on all boaters, and significance is not shown for these items.

OTHER DESTINATIONS CONSIDERED – MARKET (2 OF 2)

All boaters

Fewer than one in seven boaters consider each of the remaining destinations, and 4% name another destination.

U.S. Fly boaters often consider Colorado (45%) and Texas (39%). Ontario boaters are less likely than other markets to consider Saskatchewan (1%).

Destination	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Pennsylvania	13%	–	–	19%	8%
Colorado	12%	–	–	12%	45%
Ohio	12%	–	–	18%	9%
Illinois	11%	–	–	16%	9%
New Jersey	10%	–	–	15%	8%
Texas	10%	–	–	9%	39%
Saskatchewan	10%	1% ▼	14%	11%	9%
Indiana	7%	–	–	10%	7%
Other	4%	7%	2%	4%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). BD2 What other destinations do you consider for boating trips?

"Not sure" (2%) not shown.

No Canadian respondents selected a U.S. state (– for Canadian markets); Overall and traveller type results for U.S. states are based on all boaters, and significance is not shown for these items.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (1 OF 2)

All boaters | Traveller types are defined on slide 10

Consideration of the Canadian destinations is similar across traveller types, with no significant differences.

Older friend groups are the most likely to consider Michigan (43%) and somewhere else in Ontario (33%).

Destination	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Michigan	33%	25%	37%	28%	33%	43%
Somewhere else in Ontario	26%	21%	24%	25%	27%	33%
British Columbia	24%	23%	24%	24%	28%	19%
Minnesota	24%	25%	26%	19%	20%	33%
Wisconsin	24%	25%	25%	18%	19%	35%
Quebec	20%	15%	25%	20%	22%	14%
New York	18%	8%	24%	17%	15%	13%
Alberta	16%	6%	17%	15%	17%	19%
California	14%	8%	21%	9%	20%	9%
Manitoba	14%	7%	15%	12%	12%	19%

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

Base: all boaters (n=967). BD2 What other destinations do you consider for boating trips?

"Not sure" (2%) not shown.

No Canadian respondents selected a U.S. state (– for Canadian markets); Overall and traveller type results for U.S. states are based on all boaters, and significance is not shown for these items.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (2 OF 2)

All boaters | Traveller types are defined on slide 10

Consideration of each remaining destination is 16% or lower for every traveller type.

None of the traveller type differences on the Canadian destinations are significant.

Destination	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Pennsylvania	13%	13%	16%	13%	9%	8%
Colorado	12%	8%	16%	10%	10%	13%
Ohio	12%	14%	14%	10%	11%	13%
Illinois	11%	6%	15%	9%	9%	10%
New Jersey	10%	6%	16%	8%	10%	8%
Texas	10%	10%	14%	6%	6%	13%
Saskatchewan	10%	1%	11%	11%	15%	7%
Indiana	7%	8%	7%	6%	4%	8%
Other	4%	7%	2%	4%	1%	6%

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

Base: all boaters (n=967). BD2 What other destinations do you consider for boating trips?

"Not sure" (2%) not shown.

No Canadian respondents selected a U.S. state (– for Canadian markets); Overall and traveller type results for U.S. states are based on all boaters, and significance is not shown for these items.

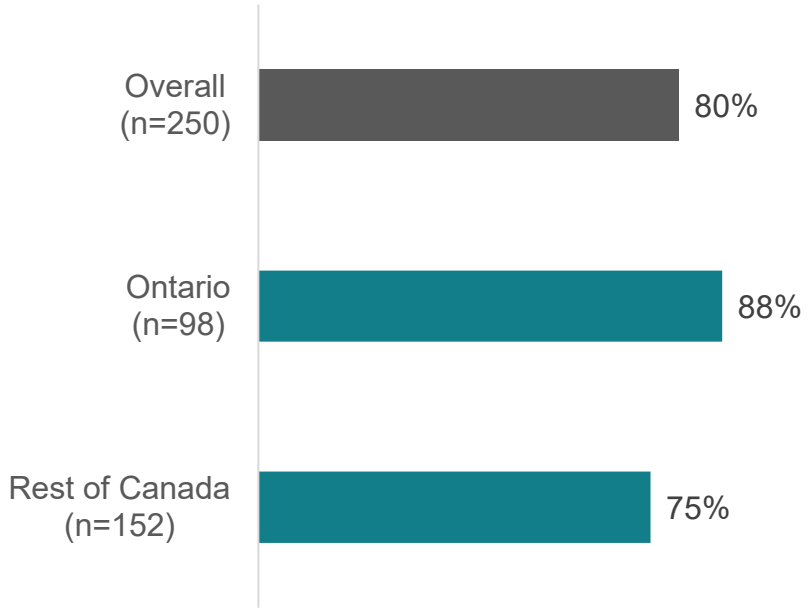
POLITICAL CLIMATE AND CHOOSING NORTHERN ONTARIO

Canadian boaters | Traveller types are defined on slide 10

Eight in ten Canadian boaters (80%) are more likely to choose Northern Ontario over the United States because of the current political climate in the U.S., including 64% who strongly agree.

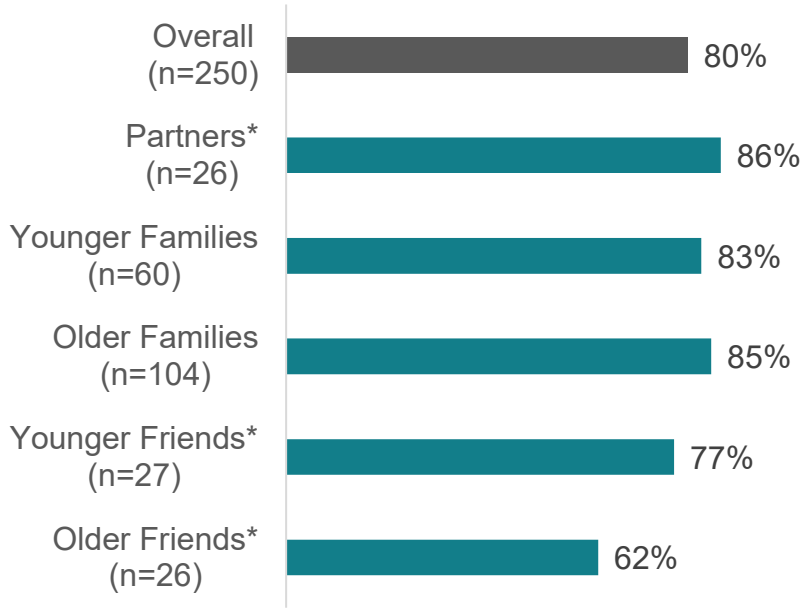
Agreement is 88% among Ontario boaters and 75% among Rest of Canada boaters. Several traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian boaters, excluding “Don’t know” (n=250). BD3A (TOP2) How much do you agree or disagree with the following statements? “I am more likely to choose Northern Ontario over the United States for travel because of the current political climate in the U.S.” TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

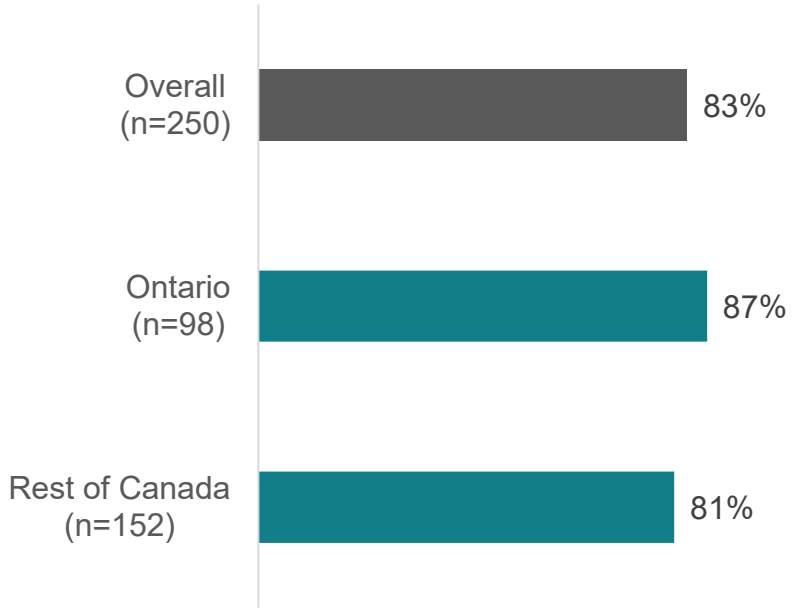
EXCHANGE RATES AND CHOOSING NORTHERN ONTARIO

Canadian boaters | Traveller types are defined on slide 10

More than eight in ten Canadian boaters (83%) are more likely to choose Northern Ontario over the United States because of unfavourable exchange rates.

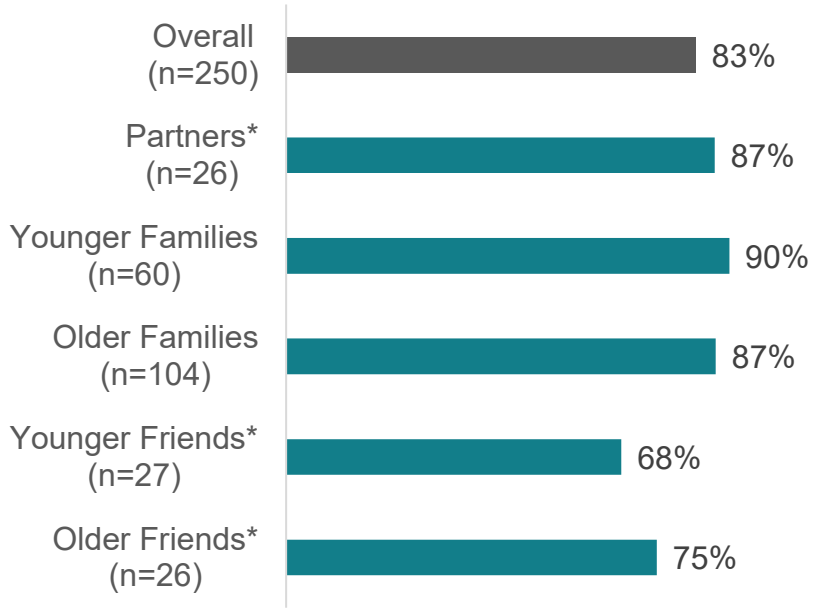
Agreement is 87% among Ontario boaters and 81% among Rest of Canada boaters, and highest among younger families (90%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian boaters, excluding “Don’t know” (n=250). BD3B (TOP2) How much do you agree or disagree with the following statements? “I am more likely to choose Northern Ontario over the United States for travel because of unfavourable exchange rates.” TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

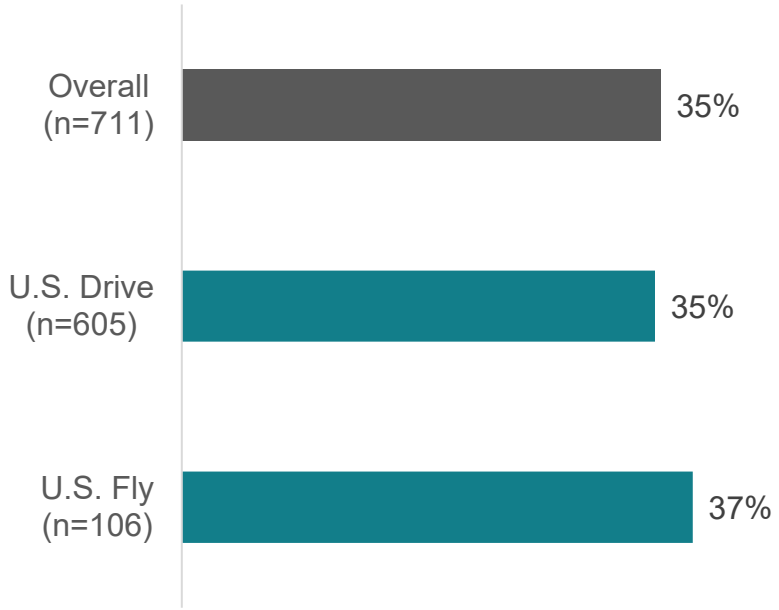
CONCERN ABOUT CROSSING THE BORDER INTO CANADA

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

A third of U.S. boaters (35%) are concerned about crossing the border to enter Canada, while half (52%) are not concerned.

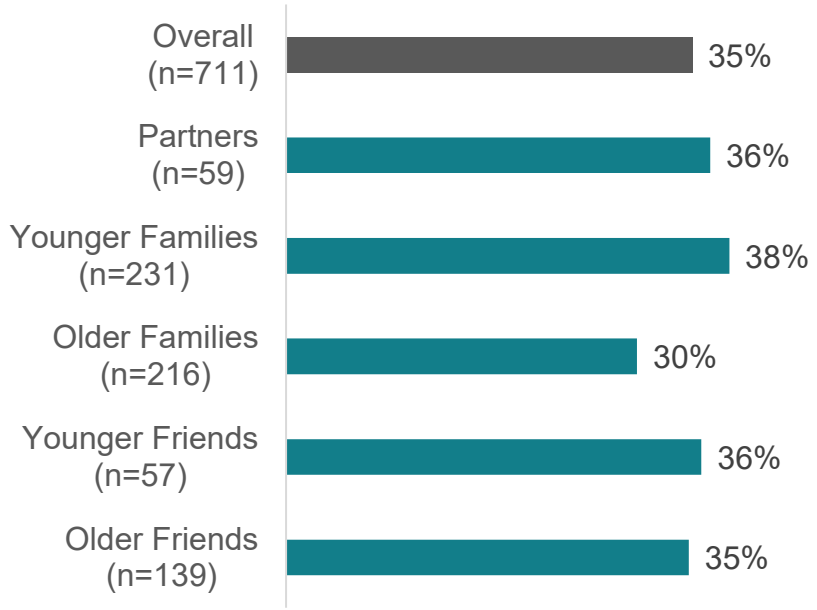
Concern is 34% among U.S. Drive boaters and 37% among U.S. Fly boaters, and ranges from 30% among older families to 38% among younger families.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. boaters, excluding “Don’t know” (n=711). BD4A (TOP2) How much do you agree or disagree with the following statements? “I am concerned about crossing the border to enter Canada.” TOP2 = % somewhat or strongly agree.

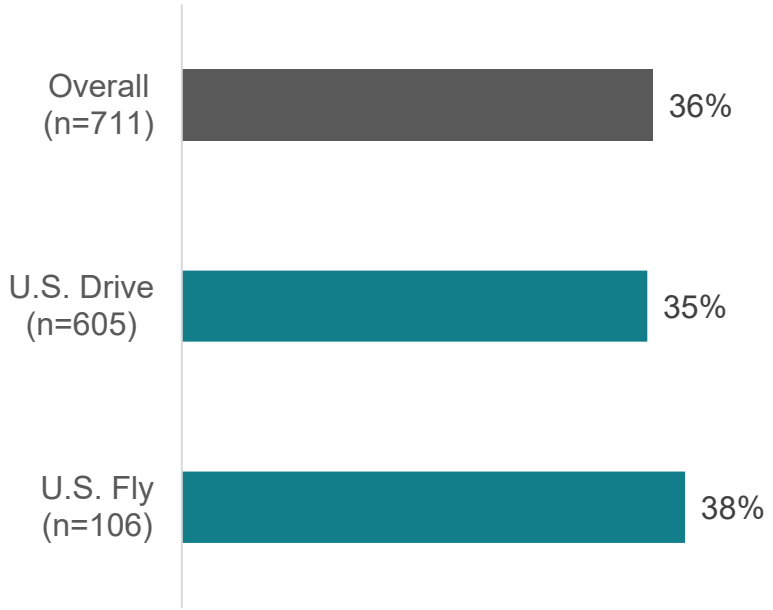
CONCERN ABOUT RETURNING TO THE U.S.

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

About a third of U.S. boaters (36%) are concerned about crossing the border when returning to the U.S. from Canada.

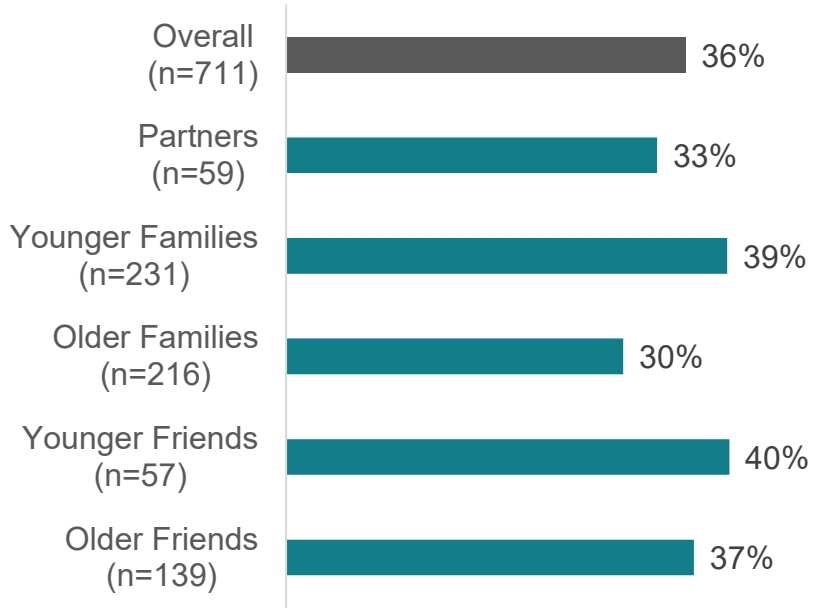
Concern is 35% among U.S. Drive boaters and 38% among U.S. Fly boaters, and ranges from 30% among older families to 40% among younger friend groups.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. boaters, excluding “Don’t know” (n=711). BD4B (TOP2) How much do you agree or disagree with the following statements? “I am concerned about crossing the border returning to the US from Canada.” TOP2 = % somewhat or strongly agree.