CONTEXT RESEARCH GROUP

CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE II
Avid Boaters: Past Visitors Report

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

October 16th, 2026

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

CONTENTS

KEY OBJECTIVES	3
METHODOLOGY	4-11
EXECUTIVE SUMMARY	12-15
PAST EXPERIENCE	16-36
PAST VISITORS VS. OVERALL	37-95



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
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 (this 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 All Boaters report.”



TRAVELLER TYPE SEGMENTS

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

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

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

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

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

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

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



NORTHERN ONTARIO - REGIONS

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

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

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

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

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





EXECUTIVE SUMMARY



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

PAST NORTHERN ONTARIO VISITORS - AVID BOATERS

Six in ten boaters have boated in Northern Ontario in the past five years, and they are avid, family boaters. Past visitors are mostly U.S. Drive (61%), Rest of Canada (17%), Ontario (13%) and U.S. Fly (10%) boaters. Seven in ten (70%) have children at home, half (50%) strongly agree boating is central to who they are, 37% belong to a club, and they take 5.4 boating trips a year. More than half (55%) know a lot about the region. (See slides 18, 80)

Their trips centre on marinas and paid lodging. Visitors have made an average of 3.3 boating trips to Northern Ontario in five years, mostly in summer (71%). Their most recent trip lasted 4.6 nights. Seven in ten (71%) stayed in paid roofed lodging and 57% used a marina, dockage or boat rental service, while Ontario visitors stayed in private cottages (29%) more than hotels (16%) and a quarter (25%) used no paid services. (See slides 17, 23, 25–27, 30, 32)

Most rate the trip highly, with Ontario boaters the exception. Three-quarters (75%) rated their trip better than boating elsewhere, rising to 81% of U.S. Drive visitors but falling to 56% of Ontario visitors, 39% of whom say it was about the same, consistent with waters that feel familiar. More than a third (36%) are taking more trips than 10 years ago, rising to 51% of younger families. Better value (33%), quality paid accommodation (31%) and more for companions to do (30%) would extend their stays. (See slides 19, 20, 36, and slides 141–144 of the All Boaters report)



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

PAST NORTHERN ONTARIO VISITORS - AVID BOATERS

Past visitors are more avid and bring bigger boats. More past visitors than boaters overall strongly agree that boating is central to who they are (50% vs. 40%), and they take more boating trips a year (5.4 vs. 5.0). They are more likely to use a cruiser or motor yacht (29% vs. 25%), sailboat (18% vs. 14%) or houseboat (11% vs. 8%). They are also more likely to belong to a club (37% vs. 29%), have children at home (70% vs. 60%) and mix guided and self-guided boating (40% vs. 33%). (See slides 38, 58, 76, 77, 80)

Past visitors know the region better and are less deterred by cost. More than half of past visitors (55%) know a lot about Northern Ontario, against 39% of boaters overall. They are less likely to cite cost (30% vs. 37%), transportation costs (26% vs. 31%) and complicated licensing (20% vs. 24%). (See slides 43, 44)

Past visitors are less escape-driven and rely less on word of mouth and search. They are less motivated than boaters overall by escape (63% vs. 70%), new places (56% vs. 61%) and nature (57% vs. 62%), and less interested in culinary experiences (40% vs. 44%). They rely less on word of mouth (49% vs. 56%) and internet search (41% vs. 48%). Almost all past visitors (92%) are likely to visit again in the next two years, against 78% overall. (See slides 42, 64, 90)



EXECUTIVE SUMMARY – SUB-REGIONAL PATTERNS

PAST NORTHERN ONTARIO VISITORS - AVID BOATERS

Sunset Country is the most visited region, and each region has a distinct role. Three in ten boaters (30%) have visited Sunset Country, followed by Superior Country (25%), Northeast Ontario (24%), The Great Canadian Wilderness (23%) and Algoma Country (20%). Ontario boaters concentrate in The Great Canadian Wilderness (51%) and Northeast Ontario (45%), while Rest of Canada boaters lean to Sunset Country (40%). (See slide 21)

Sunset Country: add quality lodging and coverage to match strong advocacy. Sunset Country visitors give the highest Net Promoter Score (+71) and want quality paid accommodation (37%) and connectivity (34%), but cite transportation costs more (32%). The practical priority is quality paid lodging capacity, connectivity on the water and at marinas, and value-led travel packages to offset the cost of getting there.

Superior and Algoma Country: build out the experience around top-rated trips. Visitors rate their trip better than elsewhere most often (81% and 84%). Superior Country visitors want more for companions to do (38%) and better connectivity (35%), and are more drawn to wildlife viewing (56%). The practical priority is companion and wildlife experiences that lengthen stays.

Northeast Ontario: expand marina and dockage capacity. Boaters who visited Northeast Ontario are the most likely to have used marina or dockage services (67%), to cite limited capacity (22%) and to say better marina facilities would extend their stays (31%). They are also the least cost-sensitive (23%) and the most likely to return (96%). With proven demand and loyal visitors, marina capacity is the clearest investment.

The Great Canadian Wilderness: support a growing, weather-exposed market. Visitors to the closest region are more likely to be taking more trips than 10 years ago (44%), but cite weather more (36%) and want quality paid accommodation (40%). The practical priority is quality roofed accommodation and weather-flexible options that keep trips going when conditions turn.



PAST EXPERIENCE

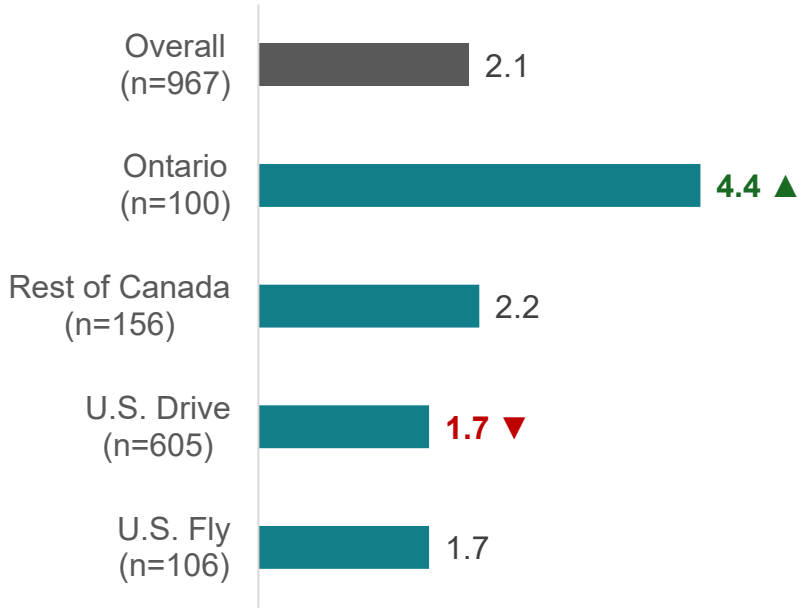
NORTHERN ONTARIO BOATING TRIPS IN THE PAST 5 YEARS

All boaters | Traveller types are defined on slide 10

Boaters have taken an average of 2.1 boating trips to Northern Ontario in the past five years.

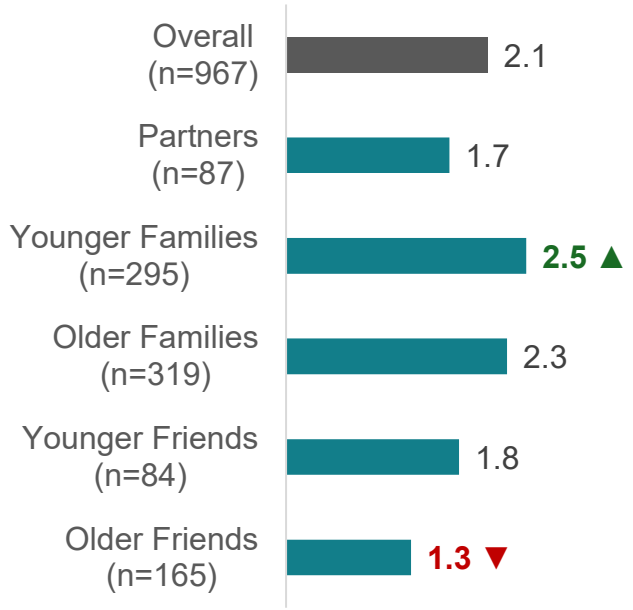
Ontario boaters average the most trips (4.4), while U.S. Drive boaters average fewer (1.7). Younger families take more trips than other traveller types (2.5), while older friend groups take fewer (1.3).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters (n=967). P1 (AVG) In the past 5 years, how many times have you visited Northern Ontario for a boating trip? AVG = average number of trips among all boaters, including those who have not visited.

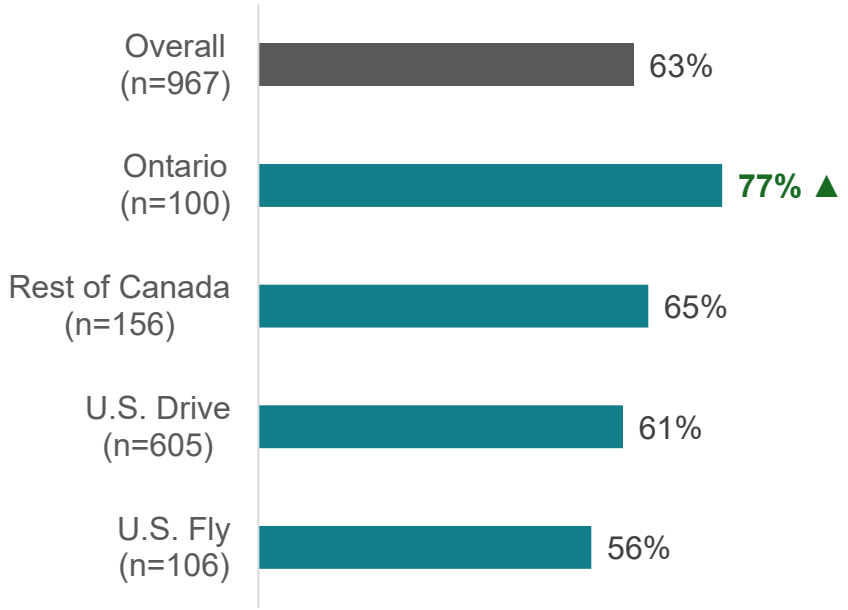
VISITED NORTHERN ONTARIO FOR BOATING IN THE PAST 5 YEARS

All boaters | Traveller types are defined on slide 10

Six in ten boaters (63%) have visited Northern Ontario for a boating trip in the past five years.

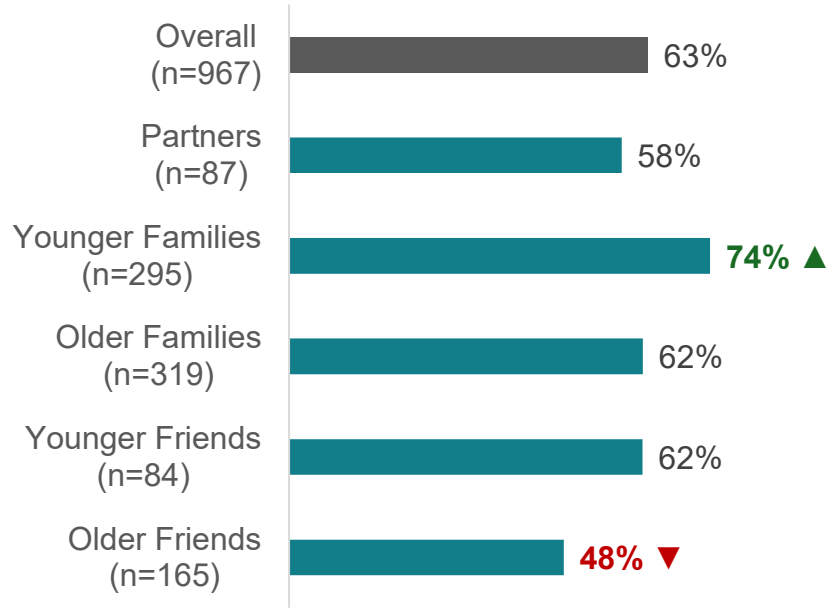
Ontario boaters are more likely than other markets to have visited (77%). Younger families are more likely than other traveller types to have visited (74%), while older friend groups are less likely (48%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all boaters (n=967). P1 (NET: At least once) In the past 5 years, how many times have you visited Northern Ontario for a boating trip? % who have visited at least once shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – MARKET

Boaters who have visited Northern Ontario in the past 5 years

More than a third of past-five-year visitors (36%) take more boating trips in Northern Ontario than they did 10 years ago, while half (49%) take about the same number and 15% take fewer.

Taking more trips ranges from 26% among Rest of Canada visitors to 44% among U.S. Fly visitors. Rest of Canada visitors are the most likely to be taking fewer trips (24%).

Change in trips	Overall (n=606)	Ontario (n=77)	Rest of Canada (n=101)	U.S. Drive (n=368)	U.S. Fly (n=59)
I take more trips than I did 10 years ago	36%	40%	26%	36%	44%
About the same as 10 years ago	49%	44%	50%	50%	44%
I take fewer trips than I did 10 years ago	15%	16%	24%	13%	11%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P1B Compared to 10 years ago, how has your participation in boating trips in Northern Ontario changed?

"Not sure" (1%) not shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to be taking more trips than 10 years ago (51%) and less likely to be taking about the same number (37%).

Partners (17%) and older friend groups (18%) are the least likely to be taking more trips.

Change in trips	Overall (n=606)	Partners (n=50)	Younger Families (n=217)	Older Families (n=197)	Younger Friends (n=52)	Older Friends (n=79)
I take more trips than I did 10 years ago	36%	17%	51% ▲	30%	40%	18%
About the same as 10 years ago	49%	67%	37% ▼	51%	46%	65%
I take fewer trips than I did 10 years ago	15%	16%	12%	17%	12%	17%

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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P1B Compared to 10 years ago, how has your participation in boating trips in Northern Ontario changed?

"Not sure" (1%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – MARKET

All boaters

Sunset Country is the part of Northern Ontario boaters have most often visited (30%), followed by Superior Country (25%), Northeast Ontario (24%), the Great Canadian Wilderness (23%) and Algoma Country (20%).

Ontario boaters are more likely than other markets to have visited the Great Canadian Wilderness (51%) and Northeast Ontario (45%), but less likely to have visited Sunset Country (14%). Sunset Country visits are highest among Rest of Canada boaters (40%).

Region	Overall (n=967)	Ontario (n=100)	Rest of Canada (n=156)	U.S. Drive (n=605)	U.S. Fly (n=106)
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	30%	14% ▼	40%	29%	33%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	25%	20%	25%	26%	29%
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	24%	45% ▲	21%	23%	17%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	23%	51% ▲	15%	22%	16%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	20%	16%	9%	23%	22%

▲ / ▼ Significantly higher / lower than the other markets

Base: all boaters (n=967). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. "Not sure" (1%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to have visited four of the five regions, from 32% for Algoma Country to 39% for Sunset Country.

Older families are less likely to have visited Algoma Country (13%).

Region	Overall (n=967)	Partners (n=87)	Younger Families (n=295)	Older Families (n=319)	Younger Friends (n=84)	Older Friends (n=165)
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	30%	22%	39% ▲	29%	25%	22%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	25%	20%	35% ▲	21%	25%	20%
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	24%	22%	33% ▲	21%	24%	16%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	23%	16%	28%	21%	24%	18%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	20%	16%	32% ▲	13% ▼	20%	14%

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

Base: all boaters (n=967). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. "Not sure" (1%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – MARKET

Boaters who have visited Northern Ontario in the past 5 years

Seven in ten past-five-year visitors (71%) took their most recent Northern Ontario boating trip in summer, followed by spring (14%), fall (12%) and winter (3%).

Summer trips range from 55% among U.S. Fly visitors to 84% among Rest of Canada visitors. U.S. Fly visitors are the most likely to have travelled in spring (25%) or winter (10%).

Season	Overall (n=606)	Ontario (n=77)	Rest of Canada (n=101)	U.S. Drive (n=368)	U.S. Fly (n=59)
Winter (December – February)	3%	0%	0%	4%	10%
Spring (March – May)	14%	6%	12%	15%	25%
Summer (June – August)	71%	82%	84%	67%	55%
Fall (September – November)	12%	12%	4%	14%	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P3 Thinking about your most recent Northern Ontario trip that involved boating, in what season did that trip take place?

"Not sure" (0%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – TRAVELLER TYPE

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

Summer is the most common season for the most recent trip in every traveller type, from 65% among partners to 76% among older families.

Partners and older friend groups are the most likely to have travelled in fall (21% each).

Season	Overall (n=606)	Partners (n=50)	Younger Families (n=217)	Older Families (n=197)	Younger Friends (n=52)	Older Friends (n=79)
Winter (December – February)	3%	2%	5%	3%	5%	2%
Spring (March – May)	14%	12%	18%	12%	19%	9%
Summer (June – August)	71%	65%	70%	76%	69%	67%
Fall (September – November)	12%	21%	7%	10%	7%	21%

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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P3 Thinking about your most recent Northern Ontario trip that involved boating, in what season did that trip take place?

"Not sure" (0%) not shown.

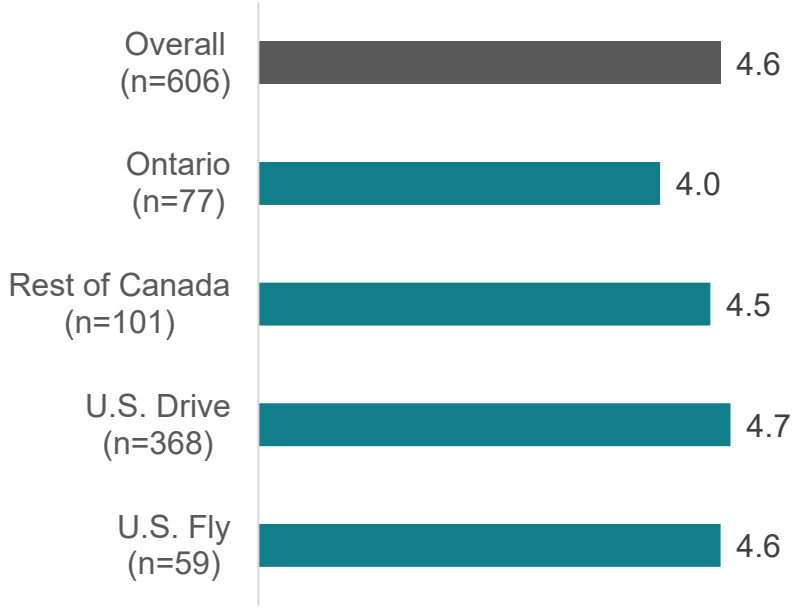
LENGTH OF MOST RECENT NORTHERN ONTARIO TRIP

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

The most recent Northern Ontario boating trip lasted an average of 4.6 nights.

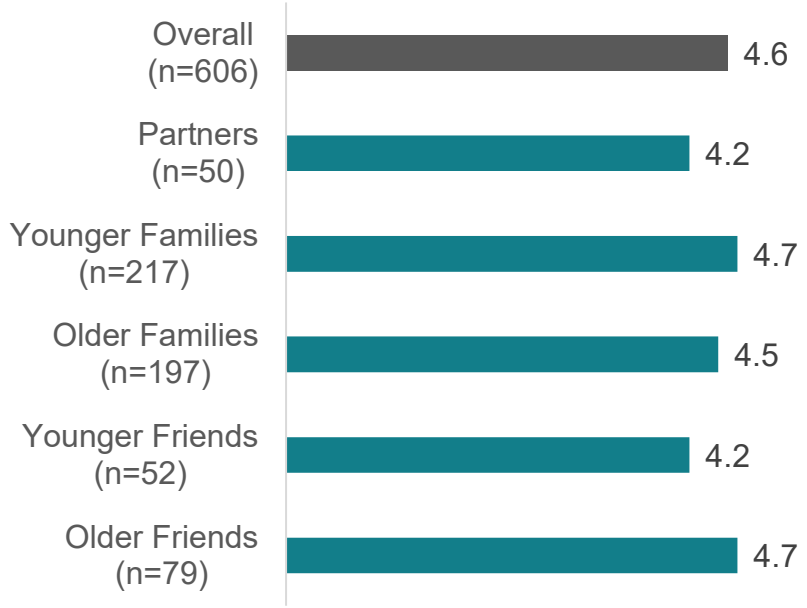
Trip length ranges from 4.0 nights among Ontario visitors to 4.7 among U.S. Drive visitors, and from 4.2 nights among partners and younger friend groups to 4.7 among younger families and older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P4 (AVG) Thinking about your most recent Northern Ontario trip that involved boating, how long was that trip (total nights away from home)? AVG = average number of nights.

ACCOMMODATION ON MOST RECENT TRIP – MARKET (1 OF 2)

Boaters who have visited Northern Ontario in the past 5 years

Hotels or motels (27%), short-term rentals (25%) and designated campgrounds (22%) were the most common places to stay on the most recent Northern Ontario boating trip, closely followed by private cottages (21%) and commercial cottage or cabin rentals (20%).

U.S. Fly visitors are more likely than other markets to have stayed in a hotel or motel (43%). Rest of Canada visitors are the least likely to have used a short-term rental (8%).

Accommodation	Overall (n=606)	Ontario (n=77)	Rest of Canada (n=101)	U.S. Drive (n=368)	U.S. Fly (n=59)
Hotel or motel	27%	16%	23%	28%	43% ▲
Short-term rental (e.g., AirBnB, Vrbo)	25%	18%	8%	30%	34%
Designated campground (private or provincial park)	22%	21%	29%	20%	25%
Private cottage (owned or borrowed)	21%	29%	27%	18%	17%
Commercial cottage or cabin rental	20%	17%	16%	22%	15%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P5 Thinking about your most recent Northern Ontario trip that involved boating, where did you stay on that trip? Please select all that apply.
"Not sure" (0%) not shown.

ACCOMMODATION ON MOST RECENT TRIP – MARKET (2 OF 2)

Boaters who have visited Northern Ontario in the past 5 years

Close to one in five visitors stayed on their boat at a marina or dockage (18%) or at a drive-in lodge or resort (18%).

Staying at a marina or dockage is most common among U.S. Fly visitors (27%) and least common among Rest of Canada visitors (6%).

Accommodation	Overall (n=606)	Ontario (n=77)	Rest of Canada (n=101)	U.S. Drive (n=368)	U.S. Fly (n=59)
Marina or dockage (boat as accommodation)	18%	14%	6%	20%	27%
Drive-in lodge or resort	18%	7%	16%	19%	24%
Backcountry or wilderness camping	13%	14%	14%	13%	17%
Home of friends or relatives (unpaid)	12%	15%	7%	12%	14%
Fly-in or remote outpost camp	8%	3%	6%	10%	8%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P5 Thinking about your most recent Northern Ontario trip that involved boating, where did you stay on that trip? Please select all that apply.
"Not sure" (0%) not shown.

ACCOMMODATION ON MOST RECENT TRIP – TRAVELLER TYPE (1 OF 2)

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

Younger families are more likely than other traveller types to have used a short-term rental (34%).

Partners are the most likely to have stayed in a hotel or motel (43%), and older friend groups the least likely to have stayed in a private cottage (8%).

Accommodation	Overall (n=606)	Partners (n=50)	Younger Families (n=217)	Older Families (n=197)	Younger Friends (n=52)	Older Friends (n=79)
Hotel or motel	27%	43%	34%	18%	34%	16%
Short-term rental (e.g., AirBnB, Vrbo)	25%	24%	34% ▲	19%	25%	16%
Designated campground (private or provincial park)	22%	9%	25%	20%	22%	27%
Private cottage (owned or borrowed)	21%	20%	22%	24%	21%	8%
Commercial cottage or cabin rental	20%	13%	21%	19%	19%	23%

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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P5 Thinking about your most recent Northern Ontario trip that involved boating, where did you stay on that trip? Please select all that apply.
"Not sure" (0%) not shown.

ACCOMMODATION ON MOST RECENT TRIP – TRAVELLER TYPE (2 OF 2)

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

Younger families are also more likely to have used backcountry or wilderness camping (22%).

Staying at a marina or dockage ranges from 10% among partners and older friend groups to 21% among younger families.

Accommodation	Overall (n=606)	Partners (n=50)	Younger Families (n=217)	Older Families (n=197)	Younger Friends (n=52)	Older Friends (n=79)
Marina or dockage (boat as accommodation)	18%	10%	21%	19%	12%	10%
Drive-in lodge or resort	18%	20%	18%	17%	15%	16%
Backcountry or wilderness camping	13%	9%	22% ▲	8%	12%	9%
Home of friends or relatives (unpaid)	12%	12%	15%	9%	9%	8%
Fly-in or remote outpost camp	8%	4%	8%	7%	8%	10%

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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P5 Thinking about your most recent Northern Ontario trip that involved boating, where did you stay on that trip? Please select all that apply.
"Not sure" (0%) not shown.

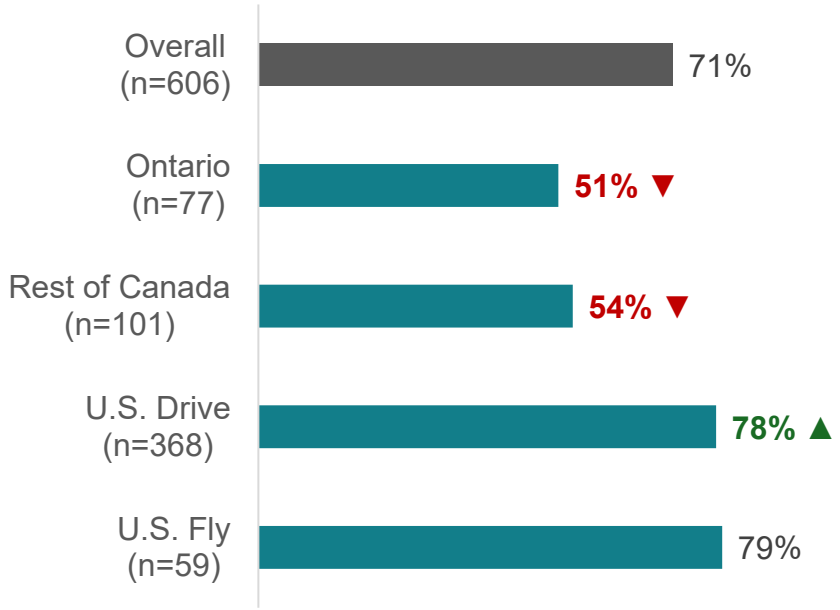
HIGH-YIELD VISITORS

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

Seven in ten past-five-year visitors (71%) stayed in paid roofed lodging on their most recent Northern Ontario trip, making them high-yield visitors.

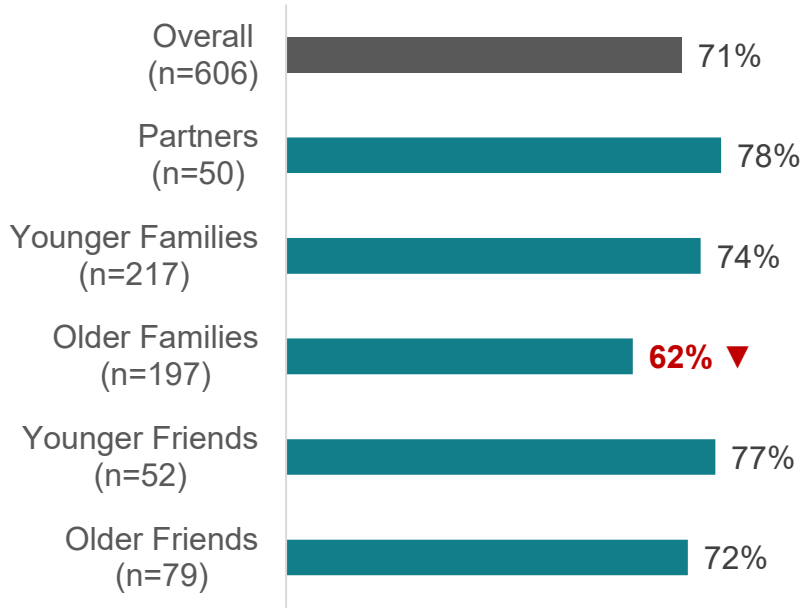
U.S. Drive visitors are more likely than other markets to be high-yield visitors (78%), while Ontario (51%) and Rest of Canada (54%) visitors are less likely. Older families are less likely than other traveller types to be high-yield (62%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P5_HY Thinking about your most recent Northern Ontario trip that involved boating, where did you stay on that trip? High-yield = stayed in a drive-in lodge or resort, fly-in or remote outpost camp, commercial cottage or cabin rental, hotel or motel, or short-term rental (P5 codes 1–5).

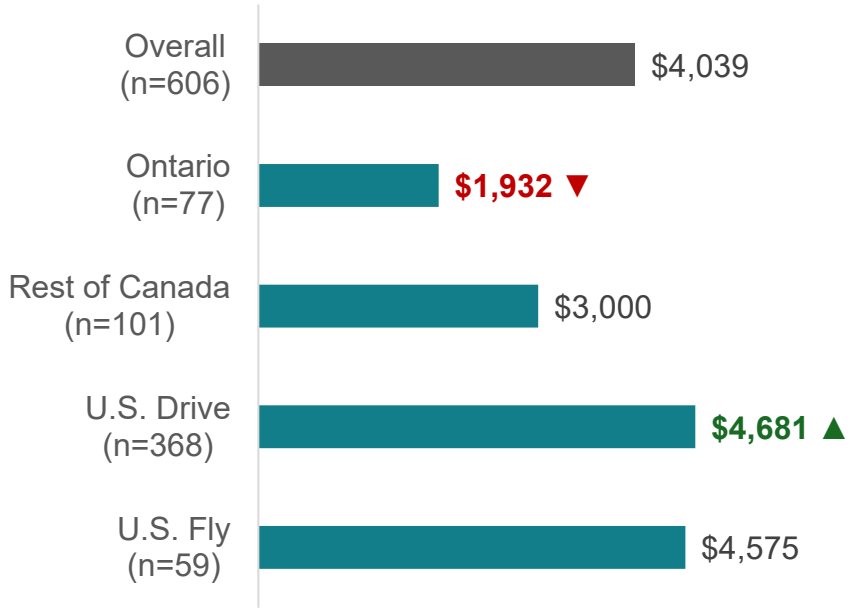
TRAVEL PARTY SPEND ON MOST RECENT NORTHERN ONTARIO TRIP

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

Travel parties spent an average of $4,039 on their most recent Northern Ontario boating trip.

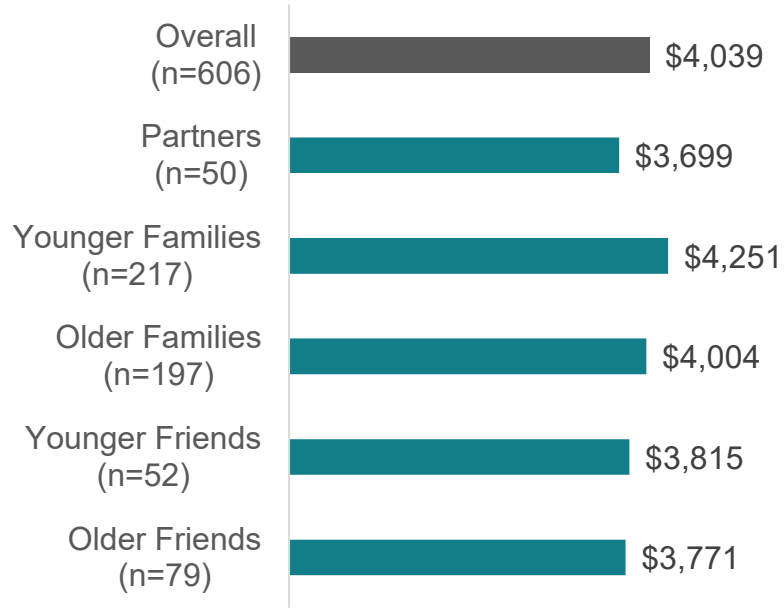
Spending is higher among U.S. Drive visitors ($4,681) and lower among Ontario visitors ($1,932). Among traveller types, spending ranges from $3,699 among partners to $4,251 among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P6 (CAD) Approximately how much did your travel party spend in total on that Northern Ontario trip? Average total travel party spend in Canadian dollars; U.S. responses converted at 1.37.

SERVICES USED ON MOST RECENT TRIP – MARKET

Boaters who have visited Northern Ontario in the past 5 years

More than half of past-five-year visitors (57%) used a marina, dockage or boat rental or berth service on their most recent trip, and four in ten (43%) used equipment or gear rental. Only 14% used none of these services.

U.S. Drive and U.S. Fly visitors are more likely than other markets to have used packaged experiences (36% and 50%), and U.S. Fly visitors charter or float plane services (22%).

Ontario and Rest of Canada visitors are less likely to have used packaged experiences (12% and 11%), and Rest of Canada visitors are more likely to have used none of these services (33%).

Service	Overall (n=606)	Ontario (n=77)	Rest of Canada (n=101)	U.S. Drive (n=368)	U.S. Fly (n=59)
Marina, dockage, or boat rental/berth service	57%	57%	40%	60%	67%
Equipment or gear rental	43%	29%	32%	49% ▲	47%
Local outfitter or guide service	34%	24%	23%	38%	41%
Packaged experience (e.g., guided boating package with accommodation, American Plan)	30%	12% ▼	11% ▼	36% ▲	50% ▲
Charter or float plane	10%	2%	5%	11%	22% ▲
None of the above	14%	25%	33% ▲	9% ▼	3% ▼

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

SERVICES USED ON MOST RECENT TRIP – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to have used equipment or gear rental (51%), while older families are less likely (32%).

Older families are also more likely to have used none of these services (22%).

Service	Overall (n=606)	Partners (n=50)	Younger Families (n=217)	Older Families (n=197)	Younger Friends (n=52)	Older Friends (n=79)
Marina, dockage, or boat rental/berth service	57%	44%	64%	54%	55%	55%
Equipment or gear rental	43%	30%	51% ▲	32% ▼	43%	57%
Local outfitter or guide service	34%	20%	37%	31%	36%	37%
Packaged experience (e.g., guided boating package with accommodation, American Plan)	30%	24%	37%	30%	23%	26%
Charter or float plane	10%	6%	14%	7%	9%	8%
None of the above	14%	23%	9%	22% ▲	13%	5%

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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – MARKET

Boaters who have visited Northern Ontario in the past 5 years

For most past-five-year visitors, Northern Ontario was the primary and only destination (53%) or the main destination with brief stops elsewhere (35%) of their most recent boating trip.

Being the primary and only destination is most common among Ontario and Rest of Canada visitors (58% each), with no significant market differences.

Role of Northern Ontario	Overall (n=606)	Ontario (n=77)	Rest of Canada (n=101)	U.S. Drive (n=368)	U.S. Fly (n=59)
Northern Ontario was our primary and only destination	53%	58%	58%	50%	52%
Northern Ontario was the main destination, with brief stops elsewhere	35%	27%	28%	37%	42%
Northern Ontario was one of several equal destinations on the trip	10%	10%	12%	11%	5%
Northern Ontario was a secondary stop on a trip focused elsewhere	1%	1%	2%	1%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (1%) not shown.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – TRAVELLER TYPE

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

Older friend groups are the most likely to say Northern Ontario was their primary and only destination (64%), and younger friend groups the least likely (40%).

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=606)	Partners (n=50)	Younger Families (n=217)	Older Families (n=197)	Younger Friends (n=52)	Older Friends (n=79)
Northern Ontario was our primary and only destination	53%	57%	46%	57%	40%	64%
Northern Ontario was the main destination, with brief stops elsewhere	35%	26%	41%	30%	46%	28%
Northern Ontario was one of several equal destinations on the trip	10%	13%	10%	11%	13%	8%
Northern Ontario was a secondary stop on a trip focused elsewhere	1%	0%	3%	1%	1%	0%

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

Base: boaters who have visited Northern Ontario for boating in the past 5 years (n=606). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (1%) not shown.

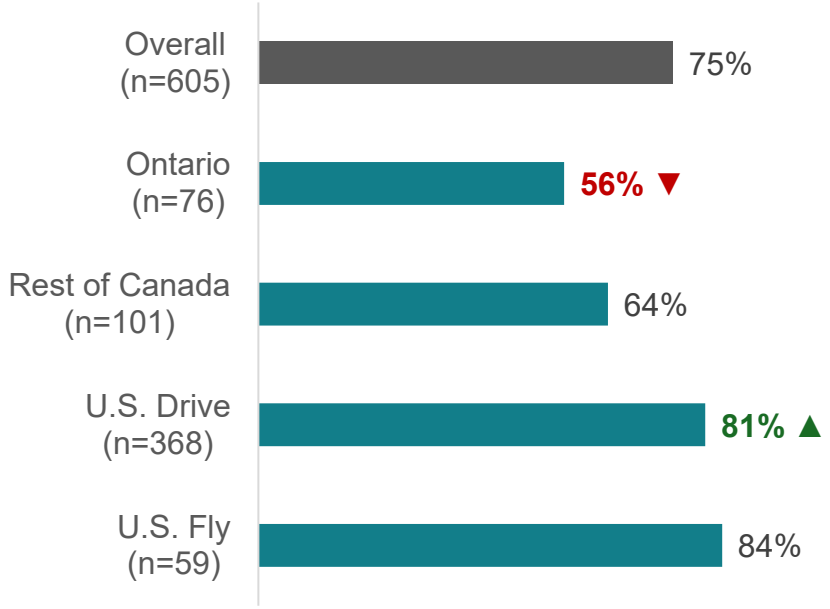
RATING OF MOST RECENT NORTHERN ONTARIO EXPERIENCE

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

Three-quarters of past-five-year visitors (75%) rate their most recent Northern Ontario boating experience as somewhat or much better than trips taken elsewhere, including 44% who rate it much better.

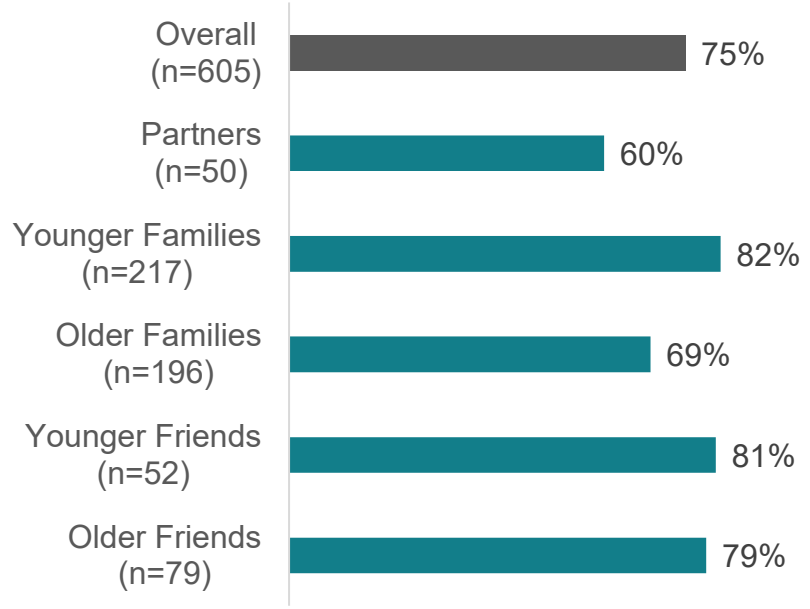
Ratings are higher among U.S. Drive visitors (81%) and lower among Ontario visitors (56%). Among traveller types, ratings range from 60% among partners to 82% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: boaters who have visited Northern Ontario for boating in the past 5 years, excluding “Don’t know” (n=605). P8 (TOP2) Compared to boating trips you have taken elsewhere, how would you rate your most recent Northern Ontario experience overall? TOP2 = % somewhat or much better.



PAST VISITORS VS. OVERALL

PAST VISITORS: BOATING AS PART OF IDENTITY – MARKET

All boaters

Nearly nine in ten past visitors (89%) agree that boating and boat culture is a central part of who they are, compared with 83% of boaters overall.

Agreement is higher among visitors in U.S. Drive (93% vs. 87%) and U.S. Fly (96% vs. 86%). Ontario and Rest of Canada visitors are similar to their markets overall.

Response	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
TOP2: Somewhat agree + Strongly agree	83%	70%	75%	87%	86%
	89% ▲	77%	81%	93% ▲	96% ▲

All boaters (overall)

Have visited Northern Ontario (past 5 years)

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

Base: all boaters (n=967; past visitors n=606). 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."

PAST VISITORS: BOATING AS PART OF IDENTITY – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger family (92% vs. 87%) and younger friend group (88% vs. 76%) visitors agree more than their traveller type overall that boating is a central part of who they are.

Visitors in the other traveller types are similar to their group overall.

Response	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
TOP2: Somewhat agree + Strongly agree	83%	74%	87%	84%	76%	84%
	89% ▲	84%	92% ▲	87%	88% ▲	88%

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

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

Base: all boaters (n=967; past visitors n=606). 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."

PAST VISITORS: LIKELIHOOD TO RECOMMEND (NPS) – MARKET

Boaters who know a lot or a little about Northern Ontario

Past visitors give Northern Ontario an NPS of 58, well above the 35 among all boaters who know the region.

Visitors are more positive than their market overall in Rest of Canada (53 vs. 25), U.S. Drive (60 vs. 36) and U.S. Fly (75 vs. 43). Ontario visitors match their market overall (41).

Measure	Overall (n=844 / 586)	Ontario (n=89 / 69)	Rest of Canada (n=135 / 101)	U.S. Drive (n=528 / 357)	U.S. Fly (n=92 / 59)
NPS score	35	41	25	36	43
	58 ▲	41	53 ▲	60 ▲	75 ▲

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

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

Base: boaters who know a lot or a little about Northern Ontario (n=844; past visitors n=586). 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).

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

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

Visitors give Northern Ontario a higher NPS than their traveller type overall among younger families (63 vs. 48), older families (54 vs. 35) and older friend groups (77 vs. 34).

Partner visitors also rate it higher (30 vs. 2), although the difference is not significant.

Measure	Overall (n=844 / 586)	Partners (n=73 / 46)	Younger Families (n=266 / 210)	Older Families (n=282 / 193)	Younger Friends (n=71 / 51)	Older Friends (n=137 / 76)
NPS score	35	2	48	35	25	34
	58 ▲	30	63 ▲	54 ▲	46	77 ▲

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

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

Base: boaters who know a lot or a little about Northern Ontario (n=844; past visitors n=586). 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).

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

All boaters

More than nine in ten past visitors (92%) are likely to visit Northern Ontario for boating in the next two years, compared with 78% of boaters overall.

Visitors are more likely to return than their market overall in Rest of Canada (81% vs. 63%), U.S. Drive (95% vs. 80%) and U.S. Fly (92% vs. 74%).

Response	Overall (n=955 / 605)	Ontario (n=98 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=595 / 368)	U.S. Fly (n=106 / 59)
TOP2: Somewhat likely + Very likely	78%	91%	63%	80%	74%
	92% ▲	95%	81% ▲	95% ▲	92% ▲

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

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

Base: all boaters, excluding “Don’t know” (n=955; past visitors n=605). N4 (TOP2) How likely are you to visit Northern Ontario for a boating trip in the next 2 years?

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

All boaters | Traveller types are defined on slide 10

Past visitors are more likely than their traveller type overall to visit in the next two years in every traveller type, from 83% among partner visitors to 94% among older family visitors.

The gap is largest among older friend groups (92% vs. 75%) and younger friend groups (90% vs. 72%).

Response	Overall (n=955 / 605)	Partners (n=85 / 50)	Younger Families (n=294 / 216)	Older Families (n=315 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=161 / 79)
TOP2: Somewhat likely + Very likely	78%	68%	82%	80%	72%	75%
	92% ▲	83% ▲	93% ▲	94% ▲	90% ▲	92% ▲

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

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

Base: all boaters, excluding “Don’t know” (n=955; past visitors n=605). N4 (TOP2) How likely are you to visit Northern Ontario for a boating trip in the next 2 years?

PAST VISITORS: BARRIERS – MARKET (1 OF 7)

All boaters

Past visitors are less likely than boaters overall to be discouraged by cost (30% vs. 37%) and high transportation costs (26% vs. 31%), while wildfires (31%) and weather (29%) are cited as often as by boaters overall.

U.S. Drive visitors are less likely than their market overall to cite cost (26% vs. 35%) and transportation costs (25% vs. 31%), and U.S. Fly visitors cost (23% vs. 35%).

Barrier	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Cost	37%	31%	52%	35%	35%
	30% ▼	31%	47%	26% ▼	23% ▼
Wildfires, flooding, or other environmental disruptions	31%	37%	35%	30%	25%
	31%	37%	29%	32%	22%
High transportation costs (gas, airfare)	31%	26%	34%	31%	30%
	26% ▼	28%	33%	25% ▼	23%
Unfavourable weather or season timing	30%	46%	31%	30%	21%
	29%	47%	25%	28%	16%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (2 OF 7)

All boaters

Past visitors are less likely to be discouraged by complicated licensing or permit requirements (20% vs. 24%), and cite poor value, poor access and safety concerns at similar rates to boaters overall.

U.S. Drive visitors are less likely than their market overall to cite poor value for money (18% vs. 23%), poor access (19% vs. 24%) and complicated licensing (21% vs. 26%).

Barrier	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Poor value for money	27%	33%	44%	23%	20%
	24%	35%	44%	18% ▼	14%
Poor road, trail, or water access	27%	43%	29%	24%	24%
	24%	48%	27%	19% ▼	23%
Concerns about safety	26%	31%	17%	28%	24%
	25%	33%	14%	27%	18%
Complicated licensing, registration, or permit requirements	24%	21%	20%	26%	20%
	20% ▼	21%	16%	21% ▼	19%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

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

PAST VISITORS: BARRIERS – MARKET (3 OF 7)

All boaters

Past visitors are less likely to say Northern Ontario is too far to drive (17% vs. 22%) or to cite expensive licensing requirements (17% vs. 22%).

Distance is less of a barrier for U.S. Drive (12% vs. 18%) and U.S. Fly (12% vs. 25%) visitors than for their markets overall.

Barrier	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Too far to drive	22%	22%	39%	18%	25%
	17% ▼	21%	33%	12% ▼	12% ▼
Expensive licensing, registration, or permit requirements	22%	22%	19%	22%	24%
	17% ▼	23%	12%	17% ▼	19%
Insects (e.g., blackflies, mosquitoes)	20%	36%	19%	20%	11%
	19%	31%	17%	18%	11%
Lack of amenities or services at the destination	19%	29%	20%	18%	17%
	17%	27%	16%	16%	14%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

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

PAST VISITORS: BARRIERS – MARKET (4 OF 7)

All boaters

Accommodation, regulations and marina or dockage capacity are cited by similar shares of past visitors and boaters overall (15% to 17%).

Among U.S. boaters, 25% of U.S. Drive and 12% of U.S. Fly visitors cite anti-American sentiment, similar to their markets overall. Significance is not shown for this U.S.-only item.

Barrier	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Anti-American sentiment	19%	–	–	28%	14%
	16%	–	–	25%	12%
Limited accommodation options	19%	19%	24%	18%	17%
	17%	14%	19%	18%	15%
Unfamiliar or unclear regulations	18%	28%	14%	17%	17%
	15%	30%	8%	14%	13%
Limited marina or dockage capacity	17%	21%	13%	17%	18%
	17%	22%	16%	16%	19%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (5 OF 7)

All boaters

Connectivity (15%) and vehicle registration requirements (10%) are cited by similar shares of past visitors and boaters overall.

Among U.S. boaters, 18% of U.S. Drive and 13% of U.S. Fly visitors cite concerns about crossing the Canada-US border, compared with 22% and 21% of their markets overall. Significance is not shown for this U.S.-only item.

Barrier	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Poor or unreliable cell phone or internet connectivity	17%	25%	14%	15%	19%
	15%	25%	16%	14%	12%
Concerns about crossing the Canada-US border	16%	–	–	22%	21%
	12%	–	–	18%	13%
Vehicle registration or insurance requirements across jurisdictions	12%	11%	11%	12%	16%
	10%	13%	8%	10%	10%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (6 OF 7)

All boaters

Planning information, remoteness and secure storage are each cited by about one in ten past visitors, similar to boaters overall.

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

Barrier	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Difficulty finding reliable trip planning information	12%	12%	7%	13%	12%
	10%	12%	4%	10%	12%
Too remote or rugged for my comfort level	12%	19%	15%	10%	13%
	11%	18%	12%	9%	16%
Lack of secure equipment or vehicle storage	11%	15%	7%	12%	8%
	12%	17%	9%	12%	8%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (7 OF 7)

All boaters

Few past visitors say they do not know enough about Northern Ontario's boating opportunities (3% vs. 8% of boaters overall).

This is lower among U.S. Drive (3% vs. 9%) and U.S. Fly (1% vs. 6%) visitors than among their markets overall.

Barrier	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Availability of campsites or RV sites	10%	7%	16%	9%	8%
	10%	9%	15%	8%	11%
I do not know enough about Northern Ontario's boating opportunities	8%	4%	8%	9%	6%
	3% ▼	3%	3%	3% ▼	1% ▼
Not sure the boating quality would meet my expectations	7%	16%	8%	6%	5%
	6%	18%	3%	5%	4%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

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

All boaters | Traveller types are defined on slide 10

Past visitors are less likely than boaters overall to be discouraged by cost (30% vs. 37%) and high transportation costs (26% vs. 31%).

Younger family visitors are less likely than younger families overall to cite cost (26% vs. 31%).

Barrier	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Cost	37%	27%	31%	39%	44%	49%
	30% ▼	23%	26% ▼	35%	31%	34%
Wildfires, flooding, or other environmental disruptions	31%	30%	29%	29%	25%	43%
	31%	29%	30%	32%	22%	41%
High transportation costs (gas, airfare)	31%	17%	29%	31%	28%	41%
	26% ▼	10%	26%	29%	23%	30%
Unfavourable weather or season timing	30%	31%	23%	35%	35%	32%
	29%	23%	24%	36%	25%	32%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

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

All boaters | Traveller types are defined on slide 10

Past visitors are less likely to be discouraged by complicated licensing or permit requirements (20% vs. 24%).

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

Barrier	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Poor value for money	27%	16%	23%	27%	36%	35%
	24%	12%	23%	29%	31%	22%
Poor road, trail, or water access	27%	16%	22%	32%	26%	31%
	24%	13%	19%	30%	25%	28%
Concerns about safety	26%	23%	23%	24%	34%	32%
	25%	17%	21%	24%	36%	36%
Complicated licensing, registration, or permit requirements	24%	29%	17%	21%	22%	39%
	20% ▼	27%	15%	18%	19%	33%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

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

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

All boaters | Traveller types are defined on slide 10

Past visitors are less likely to say Northern Ontario is too far to drive (17% vs. 22%) or to cite expensive licensing requirements (17% vs. 22%).

Distance is less of a barrier for younger family (12% vs. 18%) and older friend group (5% vs. 21%) visitors than for their group overall, and partner visitors are less likely to cite insects (8% vs. 25%).

Barrier	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Too far to drive	22%	25%	18%	25%	26%	21%
	17% ▼	17%	12% ▼	25%	18%	5% ▼
Expensive licensing, registration, or permit requirements	22%	17%	18%	23%	21%	29%
	17% ▼	11%	16%	19%	14%	24%
Insects (e.g., blackflies, mosquitoes)	20%	25%	18%	22%	16%	21%
	19%	8% ▼	17%	22%	16%	22%
Lack of amenities or services at the destination	19%	18%	16%	24%	19%	17%
	17%	11%	16%	23%	23%	9%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

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

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

All boaters | Traveller types are defined on slide 10

Accommodation, regulations and marina or dockage capacity are cited by similar shares of past visitors and boaters overall.

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

Barrier	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Anti-American sentiment	19%	18%	13%	20%	12%	35%
	16%	16%	12%	15%	14%	32%
Limited accommodation options	19%	15%	19%	18%	21%	23%
	17%	13%	18%	15%	18%	24%
Unfamiliar or unclear regulations	18%	16%	12%	21%	20%	25%
	15%	13%	10%	21%	16%	15%
Limited marina or dockage capacity	17%	7%	16%	18%	9%	26%
	17%	7%	17%	19%	13%	25%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

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

All boaters | Traveller types are defined on slide 10

Connectivity, border-crossing concerns and vehicle registration requirements are cited by similar shares of past visitors and boaters overall.

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

Barrier	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Poor or unreliable cell phone or internet connectivity	17%	18%	16%	15%	13%	21%
	15%	17%	14%	13%	17%	24%
Concerns about crossing the Canada-US border	16%	13%	16%	15%	16%	24%
	12%	7%	13%	13%	11%	16%
Vehicle registration or insurance requirements across jurisdictions	12%	6%	12%	11%	17%	14%
	10%	4%	12%	12%	10%	4%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

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

All boaters | Traveller types are defined on slide 10

Planning information, remoteness and secure storage are each cited by about one in ten past visitors.

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

Barrier	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Difficulty finding reliable trip planning information	12%	5%	12%	9%	14%	17%
	10%	2%	11%	8%	17%	12%
Too remote or rugged for my comfort level	12%	8%	11%	13%	14%	10%
	11%	8%	13%	12%	17%	5%
Lack of secure equipment or vehicle storage	11%	5%	11%	9%	9%	21%
	12%	7%	12%	9%	11%	20%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

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

All boaters | Traveller types are defined on slide 10

Few past visitors say they do not know enough about Northern Ontario's boating opportunities (3% vs. 8%).

Younger family visitors are less likely than younger families overall to say this (3% vs. 8%).

Barrier	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Availability of campsites or RV sites	10%	3%	10%	8%	15%	12%
	10%	5%	12%	5%	13%	17%
I do not know enough about Northern Ontario's boating opportunities	8%	8%	8%	6%	11%	11%
	3% ▼	3%	3% ▼	3%	4%	0%
Not sure the boating quality would meet my expectations	7%	6%	6%	8%	6%	7%
	6%	6%	7%	8%	6%	4%

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

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

Base: all boaters (n=967; past visitors n=606). 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); significance is not shown for these items.

PAST VISITORS: INDEPENDENT VS. GUIDED BOATING – MARKET

All boaters

Past visitors are more likely than boaters overall to use a mix of guided and self-guided experiences (40% vs. 33%) and less likely to go fully self-guided (58% vs. 64%).

U.S. Drive visitors show the same shift compared with their market overall (42% vs. 35% using a mix).

Approach	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
I mainly go on my own or with my own group – fully self-guided	64%	77%	61%	63%	62%
	58% ▼	72%	55%	57% ▼	51%
I use a mix of guided and self-guided	33%	19%	33%	35%	36%
	40% ▲	25%	39%	42% ▲	44%
I mainly use guided or outfitted experiences provided by operators	2%	4%	4%	2%	3%
	3%	4%	6%	1%	4%

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

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

Base: all boaters (n=967; past visitors n=606). T6 When you go on a boating trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (<1%) not shown.

PAST VISITORS: INDEPENDENT VS. GUIDED BOATING – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Past visitors are more likely than boaters overall to use a mix of guided and self-guided experiences (40% vs. 33%).

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

Approach	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
I mainly go on my own or with my own group – fully self-guided	64%	75%	55%	67%	60%	69%
	58% ▼	68%	51%	60%	56%	63%
I use a mix of guided and self-guided	33%	25%	44%	29%	35%	29%
	40% ▲	32%	48%	35%	39%	37%
I mainly use guided or outfitted experiences provided by operators	2%	0%	1%	4%	6%	1%
	3%	0%	1%	5%	6%	0%

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

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

Base: all boaters (n=967; past visitors n=606). T6 When you go on a boating trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (<1%) not shown.

PAST VISITORS: USE OF CERTIFIED ROUTES OR PASSES – MARKET

All boaters

Nearly half of past visitors (47%) have used an established or certified touring route, trail pass network or passport program, compared with 36% of boaters overall.

Use is higher among visitors than their market overall in Rest of Canada (46% vs. 36%), U.S. Drive (47% vs. 36%) and U.S. Fly (61% vs. 46%).

Response	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Yes	36%	27%	36%	36%	46%
	47% ▲	36%	46% ▲	47% ▲	61% ▲

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

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

Base: all boaters (n=967; past visitors n=606). 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?
"No" and "Not sure" not shown.

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

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

All boaters | Traveller types are defined on slide 10

Younger family (56% vs. 47%) and older family (49% vs. 36%) visitors are more likely than their traveller type overall to have used a certified route, trail pass network or passport program.

Differences in the other traveller types are not significant.

Response	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Yes	36%	21%	47%	36%	36%	26%
	47% ▲	32%	56% ▲	49% ▲	38%	33%

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

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

Base: all boaters (n=967; past visitors n=606). 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?
"No" and "Not sure" not shown.

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

PAST VISITORS: IMPORTANCE OF CERTIFICATION – MARKET

All boaters

Three-quarters of past visitors (74%) say recognized certification or designation is important, compared with 69% of boaters overall.

U.S. Drive visitors place more importance on certification than their market overall (76% vs. 69%).

Response	Overall (n=962 / 605)	Ontario (n=97 / 76)	Rest of Canada (n=156 / 101)	U.S. Drive (n=604 / 368)	U.S. Fly (n=106 / 59)
TOP2: Somewhat important + Very important	69%	62%	61%	69%	86%
	74% ▲	64%	63%	76% ▲	89%

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

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

Base: all boaters, excluding “Don’t know” (n=962; past visitors n=605). B6 (TOP2) How important is it that accommodations, operators, or destinations hold a recognized certification or designation (e.g., motorcycle-friendly, snowmobile-friendly, ORV-friendly)?

PAST VISITORS: IMPORTANCE OF CERTIFICATION – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Past visitors place slightly more importance on certification than boaters overall (74% vs. 69%).

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

Response	Overall (n=962 / 605)	Partners (n=85 / 50)	Younger Families (n=295 / 217)	Older Families (n=318 / 196)	Younger Friends (n=84 / 52)	Older Friends (n=163 / 79)
TOP2: Somewhat important + Very important	69%	51%	76%	66%	70%	69%
	74% ▲	65%	79%	72%	72%	72%

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

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

Base: all boaters, excluding “Don’t know” (n=962; past visitors n=605). B6 (TOP2) How important is it that accommodations, operators, or destinations hold a recognized certification or designation (e.g., motorcycle-friendly, snowmobile-friendly, ORV-friendly)?

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

All boaters

Past visitors are less likely than boaters overall to use word of mouth (49% vs. 56%) and general internet search (41% vs. 48%) for inspiration and planning.

U.S. Drive visitors are less likely than their market overall to use both sources (47% vs. 53% and 44% vs. 52%), and U.S. Fly visitors rely less on word of mouth (38% vs. 52%).

Source	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Word of mouth (e.g., friends or family)	56%	62%	63%	53%	52%
	49% ▼	59%	59%	47% ▼	38% ▼
General internet search (e.g., Google, Bing)	48%	34%	39%	52%	50%
	41% ▼	37%	32%	44% ▼	42%
Social media content (e.g., Instagram, Facebook, YouTube)	39%	32%	33%	42%	39%
	41%	37%	27%	45%	45%
Official tourism websites (e.g., national, provincial, state, regional, city)	34%	29%	34%	35%	38%
	33%	30%	30%	33%	37%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	16%	22%	36%	40%
	33%	15%	22%	37%	51%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

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

All boaters

Past visitors use visitor centres, AI tools, articles, outfitter websites and print guides at similar rates to boaters overall (21% to 30%).

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

Source	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Travel information centres or visitor centres	27%	24%	20%	29%	24%
	26%	25%	12%	30%	26%
AI tools (e.g., ChatGPT, Gemini, Copilot)	27%	21%	17%	29%	33%
	30%	25%	17%	32%	41%
Articles, blogs, or videos about travel destinations	24%	18%	23%	24%	32%
	25%	19%	23%	25%	32%
Outfitter or lodge websites	24%	22%	17%	25%	33%
	25%	24%	10%	29%	31%
Magazines, travel guides or brochures	24%	24%	16%	25%	28%
	21%	21%	13%	23%	23%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

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

All boaters

Outdoor magazines, TV, social media influencers and forums are used by similar shares of past visitors and boaters overall.

U.S. Drive visitors are more likely than their market overall to use social media influencers (24% vs. 19%).

Source	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Outdoor or sporting magazines or publications	24%	14%	14%	26%	34%
	23%	19%	12%	26%	27%
TV shows or documentaries	23%	25%	12%	25%	25%
	23%	27%	15%	25%	25%
Social media influencers	19%	14%	20%	19%	23%
	23%	18%	20%	24% ▲	27%
Forums or online communities	18%	13%	19%	18%	18%
	18%	12%	18%	18%	22%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

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

All boaters

Specialized apps (18%), club newsletters (14%), consumer shows (11%) and travel agents (10%) are used by similar shares of past visitors and boaters overall.

U.S. Drive visitors are more likely than their market overall to use specialized apps (19% vs. 14%).

Source	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	15%	15%	15%	14%	23%
	18%	19%	11%	19% ▲	26%
Club or association newsletters or websites	12%	13%	5%	12%	20%
	14%	17%	3%	15%	22%
Travel agents	10%	5%	6%	11%	16%
	10%	4%	7%	12%	17%
Consumer shows/exhibitions	10%	8%	11%	10%	9%
	11%	3%	14%	12%	14%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

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

All boaters

Email newsletters, travel phone lines and rally or event calendars are each used by about one in ten past visitors or fewer.

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

Source	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Email newsletters	8%	8%	7%	9%	7%
	10%	10%	8%	11%	6%
Travel-related phone lines or hotlines	7%	3%	2%	8%	17%
	8%	4%	2%	9%	20%
Rally or event calendars	6%	9%	7%	5%	5%
	6%	6%	8%	6%	7%
Other	1%	5%	1%	<1%	0%
	1%	4%	0%	<1%	0%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

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

All boaters | Traveller types are defined on slide 10

Past visitors are less likely than boaters overall to use word of mouth (49% vs. 56%) and general internet search (41% vs. 48%).

Younger family visitors are less likely than younger families overall to use both sources (45% vs. 52% and 43% vs. 49%), while older friend group visitors are more likely to use social media content (61% vs. 43%).

Source	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Word of mouth (e.g., friends or family)	56%	43%	52%	57%	56%	66%
	49% ▼	38%	45% ▼	50%	47%	67%
General internet search (e.g., Google, Bing)	48%	37%	49%	45%	42%	61%
	41% ▼	28%	43% ▼	38%	31%	56%
Social media content (e.g., Instagram, Facebook, YouTube)	39%	20%	47%	35%	45%	43%
	41%	24%	46%	35%	35%	61% ▲
Official tourism websites (e.g., national, provincial, state, regional, city)	34%	24%	31%	41%	29%	37%
	33%	11%	34%	39%	25%	30%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	25%	39%	31%	26%	33%
	33%	17%	41%	34%	26%	24%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

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

All boaters | Traveller types are defined on slide 10

Past visitors use visitor centres, AI tools, articles, outfitter websites and print guides at similar rates to boaters overall.

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

Source	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Travel information centres or visitor centres	27%	24%	28%	26%	25%	26%
	26%	23%	29%	22%	18%	30%
AI tools (e.g., ChatGPT, Gemini, Copilot)	27%	19%	30%	27%	27%	24%
	30%	19%	34%	30%	28%	26%
Articles, blogs, or videos about travel destinations	24%	14%	24%	22%	30%	30%
	25%	15%	26%	23%	26%	29%
Outfitter or lodge websites	24%	14%	25%	23%	26%	29%
	25%	15%	25%	24%	26%	30%
Magazines, travel guides or brochures	24%	12%	22%	27%	18%	31%
	21%	9%	20%	21%	17%	36%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

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

All boaters | Traveller types are defined on slide 10

Outdoor magazines, TV, social media influencers and forums are used by similar shares of past visitors and boaters overall.

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

Source	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Outdoor or sporting magazines or publications	24%	13%	22%	19%	22%	38%
	23%	9%	22%	19%	27%	35%
TV shows or documentaries	23%	17%	27%	21%	21%	26%
	23%	20%	27%	20%	21%	27%
Social media influencers	19%	11%	29%	14%	21%	15%
	23%	16%	33%	19%	17%	17%
Forums or online communities	18%	14%	21%	15%	20%	19%
	18%	14%	21%	15%	14%	18%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

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

All boaters | Traveller types are defined on slide 10

Specialized apps, club newsletters, travel agents and consumer shows are used by similar shares of past visitors and boaters overall.

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

Source	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	15%	12%	23%	12%	17%	9%
	18%	14%	27%	15%	16%	8%
Club or association newsletters or websites	12%	6%	16%	12%	10%	9%
	14%	6%	19%	14%	12%	4%
Travel agents	10%	9%	10%	10%	9%	11%
	10%	16%	10%	9%	9%	12%
Consumer shows/exhibitions	10%	4%	11%	10%	6%	10%
	11%	3%	14%	11%	6%	13%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

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

All boaters | Traveller types are defined on slide 10

Email newsletters, travel phone lines and rally or event calendars are each used by about one in ten past visitors or fewer.

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

Source	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Email newsletters	8%	8%	7%	9%	8%	10%
	10%	10%	8%	10%	9%	16%
Travel-related phone lines or hotlines	7%	6%	12%	4%	9%	4%
	8%	6%	15%	3%	10%	5%
Rally or event calendars	6%	6%	8%	6%	4%	3%
	6%	6%	9%	6%	4%	2%
Other	1%	0%	0%	2%	1%	0%
	1%	0%	0%	2%	1%	0%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – MARKET

All boaters

Two-thirds of past visitors (67%) are likely to use AI tools to plan their next boating trip, compared with 61% of boaters overall.

U.S. Drive (71% vs. 63%) and U.S. Fly (88% vs. 76%) visitors are more likely than their markets overall to plan with AI, while Canadian visitors are similar to their markets.

Response	Overall (n=961 / 605)	Ontario (n=97 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=602 / 367)	U.S. Fly (n=106 / 59)
TOP2: Somewhat likely + Very likely	61%	56%	47%	63%	76%
	67% ▲	57%	47%	71% ▲	88% ▲

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

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

Base: all boaters, excluding “Don’t know” (n=961; past visitors n=605). 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?

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Younger family (78% vs. 73%) and older family (62% vs. 53%) visitors are more likely than their traveller type overall to use AI tools to plan their next trip.

Visitors in the other traveller types are similar to their group overall.

Response	Overall (n=961 / 605)	Partners (n=85 / 50)	Younger Families (n=295 / 217)	Older Families (n=315 / 197)	Younger Friends (n=84 / 51)	Older Friends (n=165 / 79)
TOP2: Somewhat likely + Very likely	61%	62%	73%	53%	59%	55%
	67% ▲	66%	78% ▲	62% ▲	63%	54%

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

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

Base: all boaters, excluding “Don’t know” (n=961; past visitors n=605). 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?

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

All boaters

Past visitors are more likely than boaters overall to most often use a cruiser or motor yacht (29% vs. 25%), while powerboat (78%) and pontoon boat (26%) use is similar.

Cruiser or motor yacht use is higher among U.S. Drive (33% vs. 26%) and U.S. Fly (38% vs. 27%) visitors than among their markets overall.

Boat	Overall (n=966 / 605)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=604 / 367)	U.S. Fly (n=106 / 59)
Powerboat (runabout, bowrider, fishing boat)	76%	74%	84%	73%	81%
	78%	76%	92%	74%	77%
Pontoon boat	28%	16%	13%	35%	25%
	26%	18%	5%	34%	25%
Cruiser / motor yacht	25%	18%	21%	26%	27%
	29% ▲	16%	19%	33% ▲	38% ▲

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

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

Base: all boaters (n=966; past visitors n=605). 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%.

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

All boaters

Past visitors are also more likely to use a sailboat (18% vs. 14%) or a houseboat (11% vs. 8%).

U.S. Drive visitors are more likely than their market overall to use both a sailboat (20% vs. 14%) and a houseboat (14% vs. 10%).

Boat	Overall (n=966 / 605)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=604 / 367)	U.S. Fly (n=106 / 59)
Sailboat	14%	12%	10%	14%	20%
	18% ▲	14%	10%	20% ▲	28%
Houseboat	8%	5%	3%	10%	7%
	11% ▲	7%	5%	14% ▲	12%
Other	2%	3%	5%	2%	<1%
	2%	1%	7%	1%	0%

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

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

Base: all boaters (n=966; past visitors n=605). 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%.

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

All boaters | Traveller types are defined on slide 10

Past visitors are more likely to most often use a cruiser or motor yacht (29% vs. 25%).

Younger family visitors are more likely than younger families overall to use a cruiser or motor yacht (40% vs. 34%).

Boat	Overall (n=966 / 605)	Partners (n=87 / 50)	Younger Families (n=294 / 216)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Powerboat (runabout, bowrider, fishing boat)	76%	74%	80%	75%	66%	77%
	78%	75%	81%	79%	62%	78%
Pontoon boat	28%	19%	33%	27%	32%	26%
	26%	11%	34%	23%	30%	19%
Cruiser / motor yacht	25%	25%	34%	21%	32%	12%
	29% ▲	30%	40% ▲	20%	39%	18%

All boaters (overall)

Have visited Northern Ontario (past 5 years)

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

Base: all boaters (n=966; past visitors n=605). 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%.

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

All boaters | Traveller types are defined on slide 10

Past visitors are more likely to use a sailboat (18% vs. 14%) or a houseboat (11% vs. 8%).

Younger family (25% vs. 21%) and older family (18% vs. 12%) visitors are more likely than their group overall to use a sailboat.

Boat	Overall (n=966 / 605)	Partners (n=87 / 50)	Younger Families (n=294 / 216)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Sailboat	14%	11%	21%	12%	10%	8%
	18% ▲	15%	25% ▲	18% ▲	14%	5%
Houseboat	8%	7%	11%	8%	8%	5%
	11% ▲	11%	13%	10%	12%	7%
Other	2%	0%	2%	3%	0%	3%
	2%	0%	2%	3%	0%	1%

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

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

Base: all boaters (n=966; past visitors n=605). 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%.

PAST VISITORS: CLUB OR ASSOCIATION MEMBERSHIP – MARKET

All boaters

More than a third of past visitors (37%) are members of a boating-related club or association, compared with 29% of boaters overall.

Membership is higher among visitors than their market overall in U.S. Drive (40% vs. 31%) and U.S. Fly (57% vs. 40%).

Response	Overall (n=966 / 605)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=604 / 367)	U.S. Fly (n=106 / 59)
Yes	29%	23%	21%	31%	40%
	37% ▲	27%	25%	40% ▲	57% ▲

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

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

Base: all boaters (n=966; past visitors n=605). A10 Are you currently a member of a boating-related club or association (e.g., riding club, snowmobile club, yacht/boating club)?
"No" and "Not sure" not shown.

PAST VISITORS: CLUB OR ASSOCIATION MEMBERSHIP – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Club membership is higher among visitors than their traveller type overall for younger families (49% vs. 39%), older families (37% vs. 29%) and younger friend groups (45% vs. 28%).

Partner and older friend group visitors are similar to their group overall.

Response	Overall (n=966 / 605)	Partners (n=87 / 50)	Younger Families (n=294 / 216)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Yes	29%	16%	39%	29%	28%	21%
	37% ▲	16%	49% ▲	37% ▲	45% ▲	17%

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

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

Base: all boaters (n=966; past visitors n=605). A10 Are you currently a member of a boating-related club or association (e.g., riding club, snowmobile club, yacht/boating club)?
"No" and "Not sure" not shown.

PAST VISITORS: PREFERRED ACCESS – MARKET

All boaters

Past visitors are more open than boaters overall to remote boat-in (54% vs. 48%) and fly-in or float plane access (24% vs. 20%), while road-accessible areas remain preferred by eight in ten (79%).

U.S. Drive visitors are more likely than their market overall to prefer boat-in (59% vs. 50%), fly-in (29% vs. 23%) and train-in access (18% vs. 14%).

Access type	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Road-accessible areas	80%	85%	80%	78%	80%
	79%	84%	79%	79%	79%
Remote boat-in access	48%	41%	35%	50%	62%
	54% ▲	48%	39%	59% ▲	64%
Fly-in or float plane access	20%	7%	13%	23%	29%
	24% ▲	9%	12%	29% ▲	32%
Train-in access	13%	8%	5%	14%	22%
	15%	9%	4%	18% ▲	26%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

PAST VISITORS: PREFERRED ACCESS – TRAVELLER TYPE

All boaters | Traveller types are defined on slide 10

Older friend group visitors are much more likely than older friend groups overall to prefer remote boat-in access (70% vs. 47%).

Younger family visitors are more likely than younger families overall to prefer train-in access (19% vs. 16%).

Access type	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Road-accessible areas	80%	78%	80%	79%	80%	82%
	79%	75%	80%	82%	77%	80%
Remote boat-in access	48%	36%	57%	43%	49%	47%
	54% ▲	46%	60%	46%	48%	70% ▲
Fly-in or float plane access	20%	12%	28%	14%	24%	20%
	24% ▲	7%	31%	17%	24%	32%
Train-in access	13%	13%	16%	11%	15%	8%
	15%	13%	19% ▲	13%	18%	8%

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

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

Base: all boaters (n=967; past visitors n=606). 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.

PAST VISITORS: GETTING TO DESTINATIONS – MARKET (1 OF 2)

All boaters

Past visitors are more likely than boaters overall to fly to a regional hub and then drive (17% vs. 13%), while use of a personal vehicle (71%) and a vehicle with a trailer (61%) is similar.

U.S. Drive visitors are more likely than their market overall to travel with a trailer (65% vs. 60%) and to fly to a regional hub (21% vs. 16%), and U.S. Fly visitors to fly to a regional hub (21% vs. 13%).

Mode of travel	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Personal vehicle (car, truck, SUV)	70%	69%	68%	69%	79%
	71%	72%	68%	71%	77%
Personal vehicle with trailer (e.g., boat, camper, ATV)	57%	42%	56%	60%	61%
	61%	48%	59%	65% ▲	58%
Fly to a regional hub, then drive	13%	7%	6%	16%	13%
	17% ▲	8%	8%	21% ▲	21% ▲

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

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

Base: all boaters (n=967; past visitors n=606). T3 How do you typically get to your boating destinations? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: GETTING TO DESTINATIONS – MARKET (2 OF 2)

All boaters

Past visitors are more likely to take a float plane or charter flight to a remote destination (10% vs. 7%).

U.S. Drive visitors are more likely than their market overall to travel by RV or motorhome (11% vs. 8%) or float plane or charter flight (11% vs. 8%).

Mode of travel	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
RV / motorhome	9%	3%	11%	8%	19%
	11%	3%	11%	11% ▲	19%
Float plane or charter flight to a remote destination	7%	7%	5%	8%	7%
	10% ▲	9%	5%	11% ▲	11%
Other	1%	4%	4%	1%	0%
	<1% ▼	0%	0%	<1%	0%

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

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

Base: all boaters (n=967; past visitors n=606). T3 How do you typically get to your boating destinations? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: GETTING TO DESTINATIONS – TRAVELLER TYPE (1 OF 2)

All boaters | Traveller types are defined on slide 10

Past visitors are more likely to fly to a regional hub and then drive (17% vs. 13%).

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

Mode of travel	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Personal vehicle (car, truck, SUV)	70%	67%	77%	70%	73%	59%
	71%	76%	78%	68%	74%	56%
Personal vehicle with trailer (e.g., boat, camper, ATV)	57%	44%	63%	56%	55%	60%
	61%	39%	66%	63%	56%	63%
Fly to a regional hub, then drive	13%	12%	17%	9%	10%	18%
	17% ▲	19%	20%	10%	13%	27%

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

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

Base: all boaters (n=967; past visitors n=606). T3 How do you typically get to your boating destinations? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: GETTING TO DESTINATIONS – TRAVELLER TYPE (2 OF 2)

All boaters | Traveller types are defined on slide 10

Past visitors are more likely to take a float plane or charter flight (10% vs. 7%).

Younger family visitors are more likely than younger families overall to travel by RV or motorhome (18% vs. 15%) or float plane (13% vs. 10%), and older friend group visitors by float plane (15% vs. 7%).

Mode of travel	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
RV / motorhome	9%	3%	15%	8%	12%	5%
	11%	3%	18% ▲	9%	11%	2%
Float plane or charter flight to a remote destination	7%	6%	10%	4%	5%	7%
	10% ▲	5%	13% ▲	7%	6%	15% ▲
Other	1%	7%	<1%	1%	1%	1%
	<1% ▼	0%	<1%	0%	0%	1%

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

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

Base: all boaters (n=967; past visitors n=606). T3 How do you typically get to your boating destinations? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: RATING OF NORTHERN ONTARIO – MARKET

Boaters who know a lot or a little about Northern Ontario

Almost all past visitors who know Northern Ontario (95%) rate it 4 or 5 out of 5 as a pleasure travel destination for boating, compared with 90% of all boaters who know it.

U.S. Drive visitors rate it higher than their market overall (96% vs. 91%). Ratings are high among visitors in every market (90% to 97%).

Response	Overall (n=818 / 586)	Ontario (n=87 / 69)	Rest of Canada (n=132 / 101)	U.S. Drive (n=508 / 357)	U.S. Fly (n=90 / 59)
TOP2: Rating of 4 or 5 (1 = Poor, 5 = Excellent)	90%	96%	82%	91%	93%
	95% ▲	97%	90%	96% ▲	95%

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

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

Base: boaters who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=818; past visitors n=586). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for boating?

PAST VISITORS: RATING OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Past visitors rate Northern Ontario highly in every traveller type, from 90% among partner visitors to 99% among younger and older friend group visitors.

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

Response	Overall (n=818 / 586)	Partners (n=65 / 46)	Younger Families (n=260 / 210)	Older Families (n=279 / 193)	Younger Friends (n=71 / 51)	Older Friends (n=129 / 76)
TOP2: Rating of 4 or 5 (1 = Poor, 5 = Excellent)	90%	80%	93%	90%	89%	93%
	95% ▲	90%	95%	94%	99%	99%

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

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

Base: boaters who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=818; past visitors n=586). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for boating?

PAST VISITORS: MOTIVATIONS – MARKET (1 OF 3)

All boaters

Past visitors are less likely than boaters overall to be motivated by escape from everyday stress (63% vs. 70%), connection with nature (57% vs. 62%) and experiencing new places (56% vs. 61%).

U.S. Drive visitors are less likely than their market overall to cite escape (62% vs. 70%) and new places (56% vs. 63%), and U.S. Fly visitors escape (57% vs. 70%) and bonding with friends or family (44% vs. 58%).

Motivation	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Escape from everyday stress and routine	70%	69%	72%	70%	70%
	63% ▼	66%	67%	62% ▼	57% ▼
Bonding with friends or family	66%	61%	72%	67%	58%
	63%	65%	70%	64%	44% ▼
Connection with nature and the outdoors	62%	54%	58%	64%	66%
	57% ▼	54%	53%	59%	58%
Experiencing new places and landscapes	61%	58%	57%	63%	60%
	56% ▼	62%	46%	56% ▼	59%

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

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

Base: all boaters (n=967; past visitors n=606). M1 What are your primary motivations for taking boating trips? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: MOTIVATIONS – MARKET (2 OF 3)

All boaters

Exploring waterways, wildlife, solitude and adventure motivate similar shares of past visitors and boaters overall (39% to 52%).

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

Motivation	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Exploring open roads, trails, or waterways	50%	52%	39%	51%	55%
	52%	61%	33%	55%	49%
Wildlife encounters and natural discovery	48%	49%	45%	49%	48%
	50%	50%	48%	52%	43%
Solitude and personal reflection	41%	34%	38%	42%	45%
	39%	37%	38%	39%	43%
Thrill, challenge, or sense of adventure	37%	36%	37%	37%	43%
	39%	42%	36%	38%	47%

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

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

Base: all boaters (n=967; past visitors n=606). M1 What are your primary motivations for taking boating trips? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: MOTIVATIONS – MARKET (3 OF 3)

All boaters

Past visitors are more likely to be motivated by tradition or cultural heritage related to boating (24% vs. 20%).

U.S. Drive visitors are more likely than their market overall to cite tradition or cultural heritage (26% vs. 20%).

Motivation	Overall (n=967 / 606)	Ontario (n=100 / 77)	Rest of Canada (n=156 / 101)	U.S. Drive (n=605 / 368)	U.S. Fly (n=106 / 59)
Tradition or cultural heritage related to the activity	20%	12%	18%	20%	33%
	24% ▲	10%	22%	26% ▲	37%
Camaraderie or connection with other boating enthusiasts	19%	19%	16%	20%	24%
	21%	25%	16%	21%	28%
Physical fitness and health	18%	17%	19%	16%	26%
	20%	19%	26%	17%	27%
Other	2%	8%	3%	2%	0%
	2%	5%	0%	2%	0%

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

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

Base: all boaters (n=967; past visitors n=606). M1 What are your primary motivations for taking boating trips? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: MOTIVATIONS – TRAVELLER TYPE (1 OF 3)

All boaters | Traveller types are defined on slide 10

Past visitors are less likely than boaters overall to be motivated by escape, connection with nature and experiencing new places.

Younger family visitors are less likely than younger families overall to cite escape (60% vs. 65%), bonding with friends or family (63% vs. 68%) and new places (57% vs. 61%).

Motivation	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Escape from everyday stress and routine	70%	49%	65%	76%	67%	79%
	63% ▼	40%	60% ▼	72%	55%	71%
Bonding with friends or family	66%	32%	68%	71%	72%	74%
	63%	28%	63% ▼	71%	69%	71%
Connection with nature and the outdoors	62%	51%	57%	63%	59%	74%
	57% ▼	44%	56%	58%	56%	70%
Experiencing new places and landscapes	61%	51%	61%	58%	62%	73%
	56% ▼	44%	57% ▼	50%	56%	74%

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

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

Base: all boaters (n=967; past visitors n=606). M1 What are your primary motivations for taking boating trips? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: MOTIVATIONS – TRAVELLER TYPE (2 OF 3)

All boaters | Traveller types are defined on slide 10

Exploring waterways, wildlife, solitude and adventure motivate similar shares of past visitors and boaters overall.

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

Motivation	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Exploring open roads, trails, or waterways	50%	35%	51%	50%	54%	52%
	52%	30%	54%	50%	48%	64%
Wildlife encounters and natural discovery	48%	37%	49%	49%	45%	55%
	50%	37%	50%	49%	48%	67%
Solitude and personal reflection	41%	34%	37%	42%	39%	47%
	39%	44%	38%	40%	30%	39%
Thrill, challenge, or sense of adventure	37%	28%	43%	33%	43%	36%
	39%	37%	45%	35%	37%	31%

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

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

Base: all boaters (n=967; past visitors n=606). M1 What are your primary motivations for taking boating trips? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: MOTIVATIONS – TRAVELLER TYPE (3 OF 3)

All boaters | Traveller types are defined on slide 10

Past visitors are more likely to be motivated by tradition or cultural heritage related to boating (24% vs. 20%).

Younger family visitors are more likely than younger families overall to cite camaraderie with other boating enthusiasts (28% vs. 24%).

Motivation	Overall (n=967 / 606)	Partners (n=87 / 50)	Younger Families (n=295 / 217)	Older Families (n=319 / 197)	Younger Friends (n=84 / 52)	Older Friends (n=165 / 79)
Tradition or cultural heritage related to the activity	20%	10%	26%	19%	20%	18%
	24% ▲	17%	29%	21%	27%	24%
Camaraderie or connection with other boating enthusiasts	19%	11%	24%	17%	21%	20%
	21%	11%	28% ▲	19%	19%	17%
Physical fitness and health	18%	16%	20%	20%	17%	13%
	20%	14%	22%	23%	18%	14%
Other	2%	4%	1%	2%	0%	6%
	2%	3%	<1%	1%	0%	10%

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

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

Base: all boaters (n=967; past visitors n=606). M1 What are your primary motivations for taking boating trips? Please select all that apply.
"Not sure" (<1%) not shown.