CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE I
Avid Hunters: All Hunters Report

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

October 28th, 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	12-19
MARKET SUMMARY	20-26
TRAVELLER TYPE SUMMARY	27-32
TRAVELLER & AVIDITY	33-42
HOW THEY TRAVEL	43-52
PLANNING & BOOKING	53-65
MOTIVATION & VALUES	66-92
AWARENESS & PERCEPTION	93-101
FUTURE DEMAND & EXPERIENCES	102-117
BARRIERS & COMPETITION	118-133



KEY OBJECTIVES

Overview:
CRG worked collaboratively with Destination Ontario (DO) and Destination Northern Ontario (RTO13) (DNO) to conduct a quantitative segmentation study of three priority traveller segments to Northern Ontario: Anglers, Hunters, and Outdoor Adventure tourists. The study updates and extends research conducted in 2014/15. Findings are designed to inform product development, investment attraction, and marketing, with a focus on identifying realistic growth opportunities grounded in the realities of travel in Northern Ontario.

Objectives:
The objectives of this survey are to evaluate:

- Segment profiles, trip characteristics, and behaviours
- Economic contribution and visitor spending, with particular attention to high-yield travellers staying in paid roofed lodging
- Perceptions of Northern Ontario as a destination for each segment's defining activity, and factors shaping overall satisfaction
- Key motivations and experience preferences driving destination selection within Northern Ontario
- Barriers and deterrents limiting visitation or constraining trip spend
- Opportunities for product development, service improvement, and experience packaging most likely to increase satisfaction, repeat visitation, and word-of-mouth
- Implications for DNO and DO marketing strategy, investment priorities, and regional dispersal across Northern Ontario's sub-regions



METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:
- 30 to 64 years old
- Participated in hunting 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 Hunter: The respondents who participate in hunting, hold a hunting licence or held one recently, and have a high household income (CA: $75K+ / US: $50K+)

Total Sample:
- Avid Hunters: n=445

Fieldwork Date:
- May 14th – June 3rd, 2026

Median Length of Interview:
- 18.3 minutes



REGIONAL SAMPLE SIZE

Regional Sample Size

Total	445
Canada	73
Ontario	24
Quebec	16
Manitoba	17
Alberta	7
British Columbia	9

U.S. Drive	308
Illinois	44
Ohio	37
New York	29
Michigan	47
Wisconsin	35
Minnesota	50
Pennsylvania	33
Indiana	20
New Jersey	13

U.S. Fly	64
California	14
Colorado	15
Texas	35



METHODOLOGY

Survey Language:
The survey was administered in English and French

Margin of Error:
Avid Hunters: ± 4.7%

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 hunter: Aged 30–64, participates in hunting, holds a hunting licence or has held one in the past two years, and has a household income of $75K+ (Canada) or $50K+ (U.S.).

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

Past visitors: Respondents who have visited Northern Ontario for a hunting trip in the past five years (57% of avid hunters, n=255).

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

High-yield visitor: A past visitor who stayed in paid roofed lodging on their most recent Northern Ontario trip.

Travel party spend: Total spend by the travel party on the most recent Northern Ontario trip, including accommodation, food and drink, activities, equipment and transportation within the region, and excluding airfare and pre-trip shopping. Shown in Canadian dollars; U.S. responses converted at 1.394.

TOP2: The combined percentage of respondents who selected the two most positive responses on a rating scale (e.g., the top two points of a five-point scale).

Net Promoter Score (NPS): The percentage rating 9 or 10 out of 10 on likelihood to recommend, minus the percentage rating 0 to 6. Scores range from -100 to +100.

AVG: Average (mean) response.

▲ / ▼: Significantly higher or lower than the comparison groups, at the 95% confidence level.



REPORT VERSION

All Hunters report (this report)
All avid hunters, n=445

Covers who avid hunters 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 hunting segment, including those who have not yet visited Northern Ontario.

Past Visitors report
Avid hunters who have visited Northern Ontario for hunting in the past five years, n=255

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 hunters on key measures.

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

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



TRAVELLER TYPE SEGMENTS

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

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

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

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

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

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

Solo travellers and partners are included in Overall but not shown separately because of small sample sizes.



NORTHERN ONTARIO - REGIONS

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

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

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

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

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





EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – PROFILE & TRIP BEHAVIOUR

ALL AVID HUNTERS

Hunters are experienced, introduced to the sport by family and focused on big game. More than half (56%) have been hunting for more than 10 years, rising to 79% of older friend groups and 77% of older families, against 39% of younger families. Three-quarters (73%) were introduced by a family member. White-tailed deer is the most commonly targeted game (81%), followed by small game (59%), upland birds (54%) and waterfowl (48%), and Rest of Canada hunters are more likely to target moose (59%). (See slides 34–37, 41–42)

Hunting is a fall-centred pursuit with frequent trips. Hunters take an average of 4.5 overnight hunting trips a year, rising to 6.0 among younger families, lasting 4.1 nights, and are willing to travel 10.0 hours one way. Fall is the preferred season (76%), followed by winter (49%); U.S. Fly hunters are more drawn to winter (65%) and less to fall (53%). Most travel by personal vehicle (83%), half with a trailer (54%), and a quarter fly to a regional hub and drive on (26%). (See slides 38–39, 44, 46, 48)

Most hunters combine their own gear with local operators. Half (51%) use local outfitters or operators in addition to their own gear, rising to 56% of U.S. Drive hunters, and four in ten (41%) mix guided and self-guided hunting. Seven in ten (72%) say working with a local operator is important, falling to 50% of Rest of Canada hunters. (See slides 49, 51, 64)

Planning relies on word of mouth, with strong interest in AI. Word of mouth (55%) and internet search (43%) lead, with word of mouth rising to 80% among Rest of Canada hunters and falling to 41% among younger families. Most plan one to six months ahead, while Rest of Canada hunters plan further ahead (41% six to twelve months). Booking is mostly direct with accommodation providers (52%) or online (45%), and two-thirds (65%) are likely to use AI to plan, rising to 74% of younger families and falling to 34% of Rest of Canada hunters. (See slides 54, 56–59, 62, 65)



EXECUTIVE SUMMARY – MOTIVATIONS, VALUES & BARRIERS

ALL AVID HUNTERS

Hunters are motivated by nature, challenge and time together. Connection with nature (57%), thrill and challenge (56%), escape (54%) and bonding with friends or family (53%) lead, with connection with nature rising to 74% among older friend groups. Catching or harvesting the target species motivates 45%, and a third value sourcing ethically harvested food (34%). Northern Lights viewing (46%), wildlife viewing (45%) and scenic driving (44%) are the strongest add-ons, and younger families are more interested in youth or family introduction-to-hunting programs (34%). (See slides 67–74)

Hunters see hunting as part of conservation. Nearly all (95%) agree hunting is part of responsible, sustainable use of natural resources, and 92% feel a personal responsibility to protect the places they visit. Conservation (90%) and supporting local businesses (89%) are the leading destination considerations, and three-quarters (75%) would pay more for a clear conservation benefit, rising to 80% of U.S. Drive hunters and falling to 41% of Rest of Canada hunters. (See slides 87, 89–90)

Cost and licensing are the main barriers. Cost (33%), poor value for money (27%), high transportation costs (26%) and expensive licensing requirements (26%) lead, with cost rising to 56% among Rest of Canada hunters and 51% among older friend groups. Rest of Canada hunters are also more likely to say Northern Ontario is too far to drive (38%), and anti-American sentiment is cited by 21% of U.S. Drive and 33% of U.S. Fly hunters. Half (51%) say financial pressures have affected their travel plans. (See slides 119–125)



EXECUTIVE SUMMARY – DESTINATION STRENGTH & FUTURE DEMAND

ALL AVID HUNTERS

Northern Ontario's hunting product is highly rated. Most hunters know a lot (42%) or a little (43%) about Northern Ontario, and younger families are more likely to know a lot (54%). Among those who know it, 94% rate it 4 or 5 out of 5 and agree it offers a wide variety of hunting experiences (94%) and excellent hunting (94%). Good value for money is the lowest-rated attribute (84%), falling to 49% among Rest of Canada hunters. (See slides 94–96, 98, 100)

Advocacy is solid, but weak among Rest of Canada hunters. Northern Ontario's Net Promoter Score is 34, ranging from 24 among older friend groups to 37 among younger families and younger friend groups, and falling to -14 among Rest of Canada hunters. Rest of Canada hunters are also less likely to seriously consider Northern Ontario (68%), to know enough to plan a trip (60%) or to see it as better than alternatives closer to home (45%). (See slides 97–98)

Intent is strong, led by younger audiences and U.S. Drive hunters. Three-quarters (75%) are likely to visit in the next two years, including 49% who are very likely, rising to 86% of younger families, 82% of younger friend groups and 81% of U.S. Drive hunters, and falling to 57% of older friend groups and 38% of Rest of Canada hunters. Eight in ten would make Northern Ontario the only (32%) or primary (49%) destination of a hunting trip. (See slides 103–104)

Hunters want abundant game, safety and clear licensing. Safety, access to nature and the abundance of wildlife and game (94% each), quality of game (93%) and clear, manageable licensing (92%) are the leading decision factors, and younger families place more importance on hunting events (67%). Most prefer road-accessible areas (83%), though four in ten would consider fly-in (42%) or boat-in access (41%), and backcountry camping (48%), private cottages (43%) and commercial cottages (41%) are the preferred lodging. (See slides 106–110, 112)



EXECUTIVE SUMMARY – ESTABLISHED AUDIENCES & FUTURE GROWTH

ALL AVID HUNTERS

Hunting balances an established base of older friend groups with younger families driving future growth. Older friend groups make up 22% of the estimated market and remain an important part of it, although their trip frequency in Northern Ontario is generally stable or declining. Younger families are a similar-sized audience (25%), and they show the highest intent and are the most likely to be taking more Northern Ontario trips than they were 10 years ago. (See slides 28, 103, and slide 20 of the Past Visitors report)

Older friend groups are the established base: experienced hunters drawn by nature. They are the most experienced hunters (79% hunting for more than 10 years), and connection with nature (74%), escape (67%) and bonding (64%) motivate them. Northern Lights viewing (52%), scenic driving (53%) and wildlife viewing (51%) would enhance their trips. Cost (51%), transportation costs (38%), expensive licensing (37%) and poor value (37%) are their main concerns, and they plan through word of mouth (65%) and outdoor or sporting magazines (39%), making value and licensing the practical levers to keep them hunting in Northern Ontario. (See slides 35, 58–59, 69–70, 73–74, 122–124)

Younger families are the growth audience. They make up 25% of the estimated market, take the most hunting trips (6.0 a year), are the most likely to know a lot about Northern Ontario (54%) and to visit in the next two years (86%), and 40% are taking more Northern Ontario trips than 10 years ago. They are more interested in youth or family introduction-to-hunting programs (34%), 78% value working with local operators, and 74% are likely to use AI to plan. They rely less on word of mouth (41%) and use Instagram (74%) alongside YouTube (86%). (See slides 38, 58–59, 61, 64–65, 73–74, 95, 103, and slide 20 of the Past Visitors report)



EXECUTIVE SUMMARY – SPEND, YIELD & ECONOMIC POTENTIAL

ALL AVID HUNTERS

Hunting trips to Northern Ontario are high-value. Travel parties spent an average of $4,307 on their most recent trip, about $1,000 per visitor over 4.1 nights (roughly $240 per visitor per night), and nearly three-quarters (73%) stayed in paid roofed accommodation.

U.S. Fly visitors deliver the highest yield. U.S. Fly hunters spend about $1,430 per visitor and U.S. Drive hunters about $1,000, against about $630 for Ontario and Rest of Canada hunters (small bases). The U.S. markets make up 81% of the potential market but 88% of its potential value. Trip length is similar across markets (3.9 to 4.2 nights).

Older families spend the most per trip and per person. Older families spend $6,784 per party, about $1,320 per visitor, over the longest trips (4.8 nights). Younger families travel in the largest parties (5.6 people) and spend the least per person (about $720), while friend groups spend about $3,535 to $3,895 per party.

Small gains in visitation or length of stay are worth a lot. Every 1,000 additional U.S. Drive hunters would bring about $1,000,000 in visitor spending and 4,200 visitor nights. Each extra night adds about $240 per visitor, which makes the levers to extend stays (better value, better road, trail or water access and quality paid accommodation) economically significant.



SPEND AND LENGTH OF STAY BY MARKET

ALL AVID HUNTERS

U.S. Fly hunters spend the most per trip, per visitor and per night. Canadian hunters spend about $630 per visitor (small bases), and trip length is similar across markets.

Measure	Overall	Ontario	Rest of Canada	U.S. Drive	U.S. Fly
Average party spend per trip	$4,307	$2,840*	$2,625*	$4,285	$6,433
Average party size (people)	4.3	4.5	4.1	4.3	4.5
Spend per visitor per trip	$997	$630*	$634*	$997	$1,429
Average nights	4.1	3.9*	3.9*	4.2	4.0
Spend per visitor per night	$243	$162*	$162*	$239	$356
Stayed in paid roofed lodging	73%	62%*	81%*	74%	74%

Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than the rest of the sample. *Small base (n<30); interpret with caution (not tested).



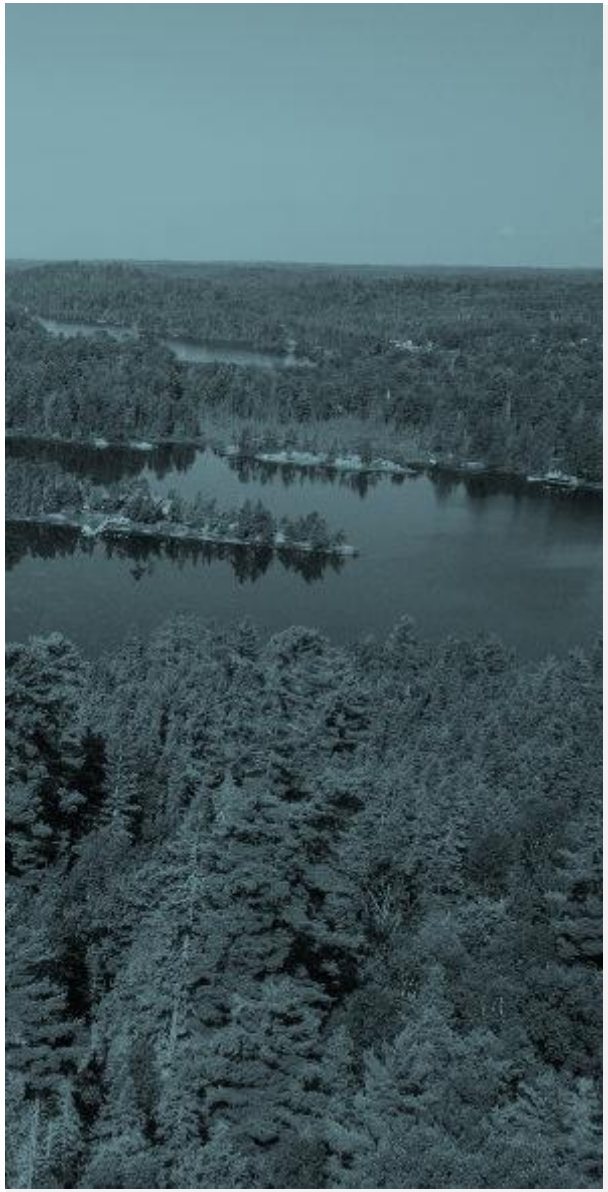
SPEND AND LENGTH OF STAY BY TRAVELLER TYPE

ALL AVID HUNTERS

Older families spend the most per trip and per person; younger families spend the least per person because they travel in the largest parties. Use of paid roofed lodging is similar across traveller types (69% to 75%).

Measure	Overall	Younger families	Older families	Younger friends	Older friends
Average party spend per trip	$4,307	$4,039	$6,784	$3,895	$3,535
Average party size (people)	4.3	5.6	5.1	3.8	4.0
Spend per visitor per trip	$997	$720	$1,324	$1,024	$891
Average nights	4.1	4.2	4.8	4.1	3.9
Spend per visitor per night	$243	$172	$273	$251	$226
Stayed in paid roofed lodging	73%	75%	69%	74%	70%

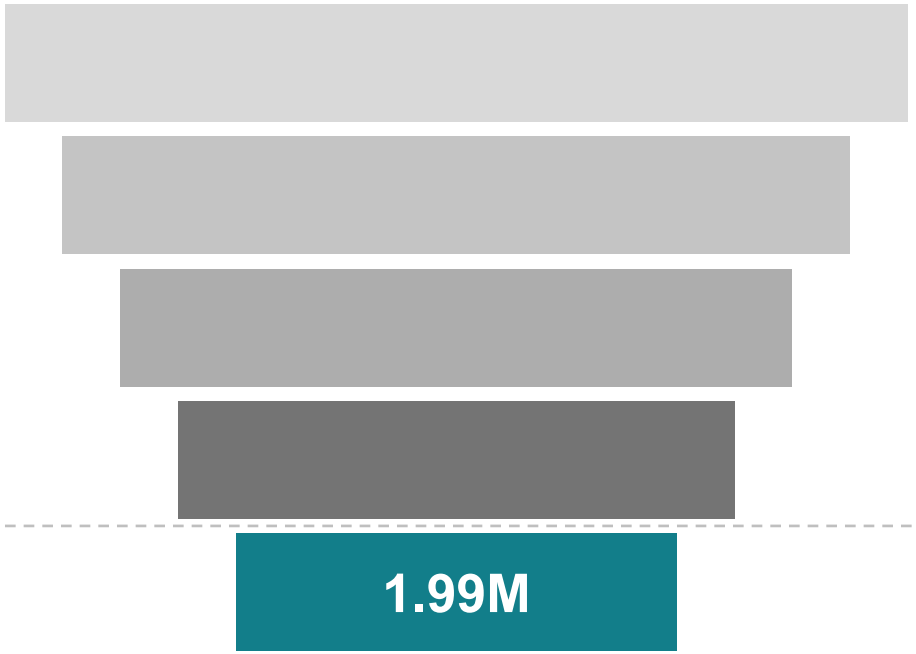
Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than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



MARKET SUMMARY

HOW THE OPPORTUNITY POOL IS BUILT: AVID HUNTERS

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



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

Hunting participants
Residents who hunt.

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

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

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

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

Bars are not to scale. Population: U.S. Census Bureau and Statistics Canada. Participation and income: published research and census data. Intent: Phase 1 survey. Income threshold: $75K+ CAD (Canada), $50K+ USD (U.S.).

ESTIMATED NORTHERN ONTARIO OPPORTUNITY POOL: AVID HUNTERS

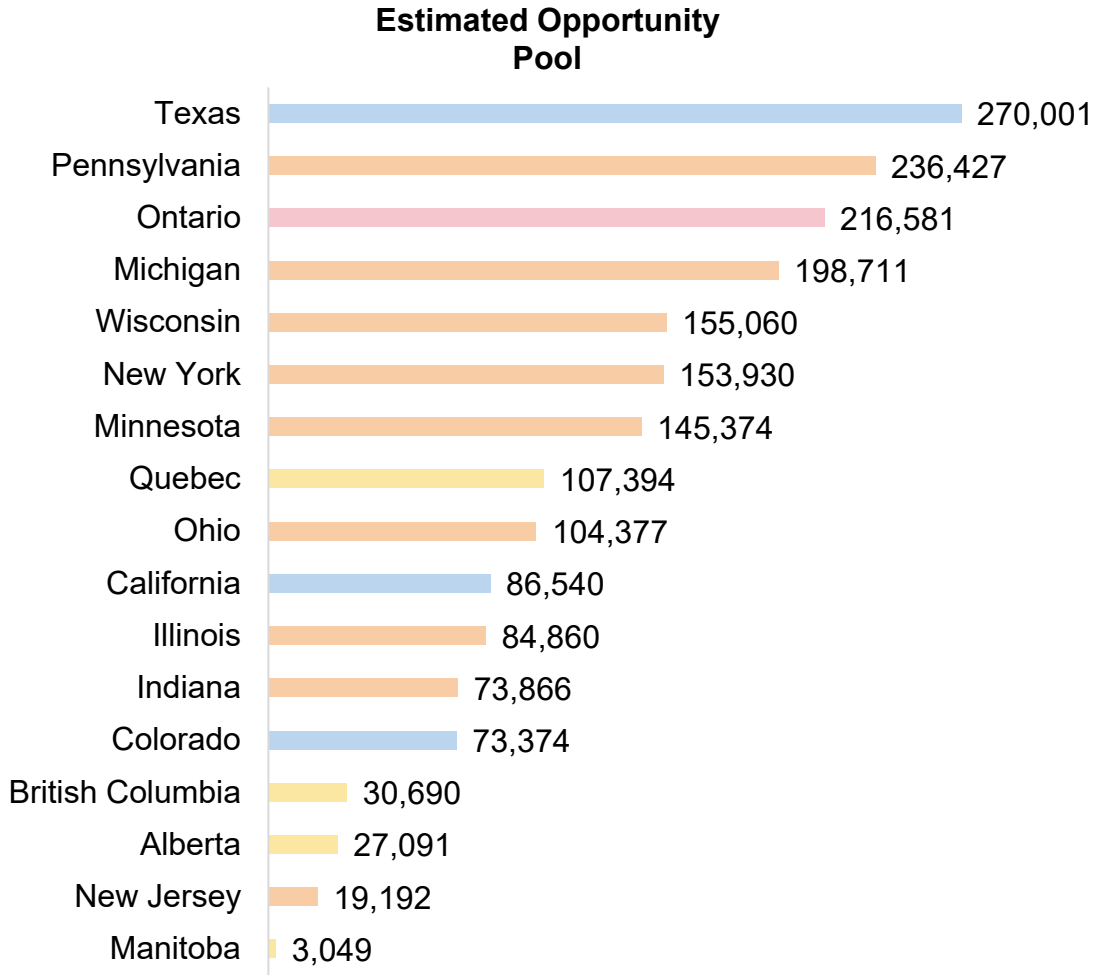
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO
216,581

Rest of Canada
168,224

U.S. Drive
1,171,797

U.S. Fly
429,915



Avid hunters aged 30–64 in the surveyed markets who told us they intend to take a hunting trip to Northern Ontario in the next two years.
Not a forecast of visitors. All markets: 1,986,517.

INCREMENTAL VISITOR SPEND: AVID HUNTERS

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

ONTARIO

216,581
Opportunity pool

1,000 additional visitors × **$630** spend per visitor* = **$630K** incremental visitor spend

Rest of Canada

168,224
Opportunity pool

1,000 additional visitors × **$634** spend per visitor* = **$634K** incremental visitor spend

U.S. Drive

1,171,797
Opportunity pool

1,000 additional visitors × **$997** spend per visitor = **$997K** incremental visitor spend

U.S. Fly

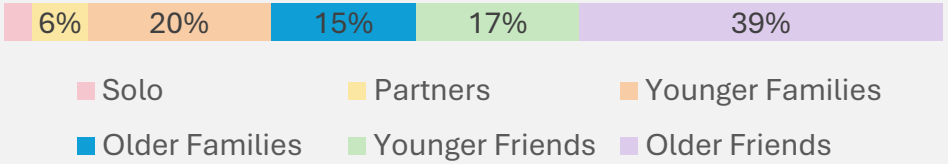
429,915
Opportunity pool

1,000 additional visitors × **$1,429** spend per visitor = **$1.43M** incremental visitor spend

Incremental direct visitor spending if 1,000 additional avid hunters from each market take a Northern Ontario trip. Based on average spend per visitor (travel party spend on the most recent Northern Ontario trip ÷ party size) among past-five-year visitors. U.S. spend converted to CAD at 1.37. Direct visitor spending only, not total economic impact. *Small base (n<30); interpret with caution.

REST OF CANADA – HUNTING

ESTIMATED OPPORTUNITY POOL: 168,224



HOW THEY TRAVEL

- Rest of Canada hunters are the least connected to Northern Ontario: only 36% have hunted there recently and 38% are likely to visit, with cost (56%) and distance (38%) the main obstacles.
- 36% have hunted in Northern Ontario in the past five years (the lowest of any market), averaging 0.7 trips.
- Their most recent trip lasted 3.9 nights at $2,625 per party, and 81% stayed in paid roofed lodging (small base).
- Drive-in lodges or resorts (44%) and private cottages (44%) are the preferred lodging options.
- Sunset Country (16%) and Algoma Country (16%) are the most visited regions, and fall (92%) and winter (25%) the preferred seasons. (See slides 44, 112, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Connection with nature (64%) and catching or harvesting the target species (58%) are the leading motivations.
- Bonding with friends or family follows (56%).
- Culinary experiences (43%) and Northern Lights viewing (40%) are the strongest add-on experiences. (See slides 67–68, 71–72)

WHAT THEY VALUE

- Conservation (83%) and supporting local businesses (82%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (32%) and paying more for a clear conservation benefit (41%) are lower than in the segment.
- 94% agree hunting is part of responsible, sustainable use of natural resources. (See slides 87, 89–90)

WHAT HOLDS THEM BACK

- Cost (56%), poor value for money (41%) and transportation costs (40%) are the leading barriers.
- Distance weighs more than for the segment overall (38% vs. 18%).
- 65% say financial pressures have affected their travel plans. (See slides 119–121, 125)

WHAT WOULD GROW THEM

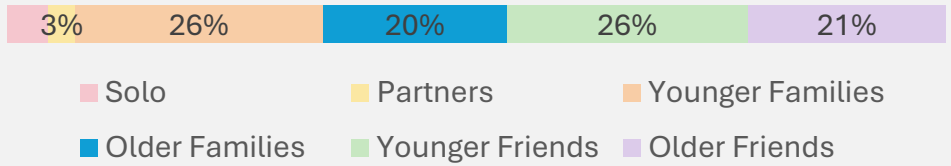
- Better value (43%), more packaged experiences (29%) and quality paid accommodation (23%) would most encourage longer stays (small base).
- 38% are likely to visit in the next two years (the lowest of any market).
- Among those who know the region, Northern Ontario's NPS is -14, below the segment (34). (See slides 97, 103, 114–115)

WHERE TO REACH THEM

- Word of mouth (80%), outfitter or lodge websites (33%) and general search (33%) are the leading planning sources.
- Among social media users, YouTube (77%), Facebook (68%) and TikTok (28%) lead (small base).
- 34% are likely to use AI tools to plan their next trip (the lowest of any market). (See slides 56–57, 60, 65)

U.S. DRIVE – HUNTING

ESTIMATED OPPORTUNITY POOL: 1,171,797



HOW THEY TRAVEL

- U.S. Drive hunters are the core market: the most likely to visit in the next two years (81%) and the most likely to combine their own gear with local outfitters (56%).
- 60% have hunted in Northern Ontario in the past five years, averaging 1.8 trips.
- Their most recent trip lasted 4.2 nights at $4,285 per party, and 74% stayed in paid roofed lodging.
- Backcountry camping (52%) and private cottages (43%) are the preferred lodging options.
- Northeast Ontario (27%) and Superior Country (26%) are the most visited regions, and fall (79%) and winter (52%) the preferred seasons. (See slides 44, 112, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Thrill and adventure (57%) and connection with nature (56%) are the leading motivations.
- Escape from everyday stress follows (56%).
- Wildlife viewing (48%) and Northern Lights viewing (48%) are the strongest add-on experiences. (See slides 67–68, 71–72)

WHAT THEY VALUE

- Conservation (92%) and minimal environmental impact (90%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (81%) and paying more for a clear conservation benefit (80%) are higher than in the segment.
- 94% agree hunting is part of responsible, sustainable use of natural resources. (See slides 87, 89–90)

WHAT HOLDS THEM BACK

- Cost (31%), wildfires and other disruptions (25%) and transportation costs (25%) are the leading barriers.
- 48% say financial pressures have affected their travel plans. (See slides 119–121, 125)

WHAT WOULD GROW THEM

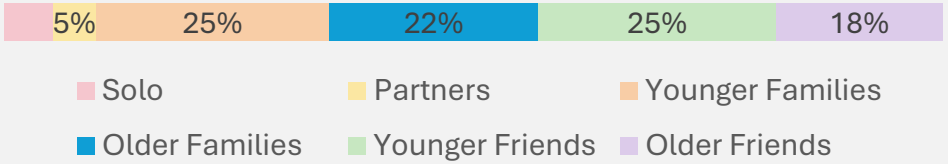
- Better value (45%), improved access infrastructure (38%) and quality paid accommodation (34%) would most encourage longer stays.
- 81% are likely to visit in the next two years (the highest of any market).
- Among those who know the region, Northern Ontario's NPS is 39 (segment 34). (See slides 97, 103, 114–115)

WHERE TO REACH THEM

- Word of mouth (52%), general search (46%) and booking or review sites (36%) are the leading planning sources.
- Among social media users, YouTube (82%), Facebook (80%) and Instagram (59%) lead.
- 69% are likely to use AI tools to plan their next trip (above the segment's 65%). (See slides 56–57, 60, 65)

U.S. FLY – HUNTING

ESTIMATED OPPORTUNITY POOL: 429,915



HOW THEY TRAVEL

- U.S. Fly hunters are the highest-value market, spending $6,433 per party on their most recent trip, and are drawn by new places (61%) and winter hunting (65%).
- 48% have hunted in Northern Ontario in the past five years, averaging 1.6 trips.
- Their most recent trip lasted 4.0 nights at $6,433 per party, and 74% stayed in paid roofed lodging.
- Backcountry camping (55%) and commercial cottages or cabins (44%) are the preferred lodging options.
- Superior Country (22%) and The Great Canadian Wilderness (21%) are the most visited regions, and winter (65%) and fall (53%) the preferred seasons. (See slides 44, 112, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Experiencing new places (61%) and thrill and adventure (59%) are the leading motivations.
- Connection with nature follows (55%).
- Culinary experiences (51%) and scenic driving (46%) are the strongest add-on experiences. (See slides 67–68, 71–72)

WHAT THEY VALUE

- Supporting local businesses (94%) and minimal environmental impact (89%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (82%) and paying more for a clear conservation benefit (78%) compare with 75% and 75% for the segment.
- 98% agree hunting is part of responsible, sustainable use of natural resources. (See slides 87, 89–90)

WHAT HOLDS THEM BACK

- Anti-American sentiment (33%), poor value for money (28%) and complicated licensing or permits (28%) are the leading barriers.
- 45% say financial pressures have affected their travel plans. (See slides 119–121, 125)

WHAT WOULD GROW THEM

- Better value (55%), quality paid accommodation (48%) and more packaged experiences (45%) would most encourage longer stays.
- 71% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 40 (segment 34). (See slides 97, 103, 114–115)

WHERE TO REACH THEM

- Word of mouth (56%), outfitter or lodge websites (41%) and general search (38%) are the leading planning sources.
- Among social media users, YouTube (84%), Instagram (81%) and Facebook (76%) lead (small base).
- 71% are likely to use AI tools to plan their next trip. (See slides 56–57, 60, 65)



TRAVELLER TYPE SUMMARY

ESTIMATED OPPORTUNITY POOL BY TRAVELLER TYPE: AVID HUNTERS

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

SOLO
93,093

YOUNGER FAMILIES
490,903

YOUNGER FRIENDS
488,330

PARTNERS
101,628

OLDER FAMILIES
368,278

OLDER FRIENDS
444,285

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

YOUNGER FAMILIES – HUNTING

ESTIMATED OPPORTUNITY POOL: 490,903

WHO THEY ARE
- Younger families are the most engaged hunters: the most likely to have visited (73%) and to visit again (86%), and 40% are taking more Northern Ontario trips than 10 years ago.
- 97% have children under 18 at home, and the largest age group is 35 to 44 (74%).
- 39% have been hunting for more than 10 years (below the segment's 56%), and 54% use local outfitters or operators alongside their own gear.
- White-tailed deer (76%) and small game (62%) are the most targeted game. (See slides 35, 37, 50)

HOW THEY TRAVEL
- 73% have hunted in Northern Ontario in the past five years (the highest of any traveller type), averaging 2.6 trips.
- Their most recent trip lasted 4.2 nights at $4,039 per party, and 75% stayed in paid roofed lodging.
- Private cottages (49%) and backcountry camping (44%) are the preferred lodging options.
- Sunset Country (37%) and Algoma Country (34%) are the most visited regions, and fall (71%) and winter (51%) the preferred seasons. (See slides 45, 113, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Thrill and adventure (54%) and connection with nature (51%) are the leading motivations.
- Bonding with friends or family follows (50%).
- Wildlife viewing (42%) and Northern Lights viewing (39%) are the strongest add-on experiences. (See slides 69–70, 73–74)

WHAT THEY VALUE
- Supporting local businesses (91%) and minimal environmental impact (89%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (79%) and paying more for a clear conservation benefit (78%) compare with 75% and 75% for the segment.
- 94% agree hunting is part of responsible, sustainable use of natural resources. (See slides 88, 91–92)

WHAT HOLDS THEM BACK
- Cost (29%), poor value for money (23%) and safety concerns (23%) are the leading barriers.
- 58% say financial pressures have affected their travel plans. (See slides 122–125)

WHAT WOULD GROW THEM
- Better value (44%), improved access infrastructure (44%) and more packaged experiences (43%) would most encourage longer stays.
- 86% are likely to visit in the next two years (the highest of any traveller type).
- Among those who know the region, Northern Ontario's NPS is 37 (segment 34). (See slides 97, 103, 116–117)

WHERE TO REACH THEM
- General search (47%), word of mouth (41%) and social media content (37%) are the leading planning sources.
- Among social media users, YouTube (86%), Facebook (75%) and Instagram (74%) lead.
- 74% are likely to use AI tools to plan their next trip. (See slides 58–59, 61, 65)

OLDER FAMILIES – HUNTING

ESTIMATED OPPORTUNITY POOL: 368,278

WHO THEY ARE
- Older families are experienced, high-spending hunters, spending $6,784 per party on their most recent trip and motivated most by bonding (65%) and escape (62%).
- 71% have children under 18 at home, and the largest age group is 45 to 54 (63%).
- 77% have been hunting for more than 10 years (above the segment's 56%), and 51% use local outfitters or operators alongside their own gear.
- White-tailed deer (87%) and upland birds (58%) are the most targeted game. (See slides 35, 37, 50)

HOW THEY TRAVEL
- 53% have hunted in Northern Ontario in the past five years, averaging 1.6 trips.
- Their most recent trip lasted 4.8 nights at $6,784 per party, and 69% stayed in paid roofed lodging.
- Private cottages (50%) and backcountry camping (44%) are the preferred lodging options.
- Superior Country (23%) and Sunset Country (21%) are the most visited regions, and fall (83%) and winter (61%) the preferred seasons. (See slides 45, 113, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Bonding with friends or family (65%) and escape from everyday stress (62%) are the leading motivations.
- Thrill and adventure follows (57%).
- Scenic driving (52%) and Northern Lights viewing (51%) are the strongest add-on experiences. (See slides 69–70, 73–74)

WHAT THEY VALUE
- Conservation (94%) and minimal environmental impact (89%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (77%) and paying more for a clear conservation benefit (74%) compare with 75% and 75% for the segment.
- 94% agree hunting is part of responsible, sustainable use of natural resources. (See slides 88, 91–92)

WHAT HOLDS THEM BACK
- Transportation costs (29%), expensive licensing or permits (28%) and poor value for money (28%) are the leading barriers.
- 48% say financial pressures have affected their travel plans. (See slides 122–125)

WHAT WOULD GROW THEM
- Better value (56%), quality paid accommodation (42%) and Indigenous cultural experiences (32%) would most encourage longer stays.
- 71% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 35 (segment 34). (See slides 97, 103, 116–117)

WHERE TO REACH THEM
- Word of mouth (56%), social media content (37%) and general search (37%) are the leading planning sources.
- Among social media users, YouTube (81%), Facebook (78%) and Instagram (63%) lead.
- 66% are likely to use AI tools to plan their next trip. (See slides 58–59, 61, 65)

YOUNGER FRIENDS – HUNTING

ESTIMATED OPPORTUNITY POOL: 488,330

WHO THEY ARE
- Younger friend groups are newer hunters (37% hunting for more than 10 years) with strong intent to visit (82%), drawn by nature, thrill and wildlife.
- 64% have children under 18 at home, and the largest age group is 35 to 44 (67%).
- 37% have been hunting for more than 10 years (the lowest of any traveller type), and 54% use local outfitters or operators alongside their own gear.
- White-tailed deer (80%) and small game (67%) are the most targeted game. (See slides 35, 37, 50)

HOW THEY TRAVEL
- 63% have hunted in Northern Ontario in the past five years, averaging 2.1 trips.
- Their most recent trip lasted 4.1 nights at $3,895 per party, and 74% stayed in paid roofed lodging.
- Backcountry camping (51%) and commercial cottages or cabins (42%) are the preferred lodging options.
- The Great Canadian Wilderness (29%) and Northeast Ontario (27%) are the most visited regions, and fall (75%) and winter (44%) the preferred seasons. (See slides 45, 113, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Connection with nature (56%) and thrill and adventure (53%) are the leading motivations.
- Wildlife encounters follows (53%).
- Northern Lights viewing (43%) and wildlife viewing (41%) are the strongest add-on experiences. (See slides 69–70, 73–74)

WHAT THEY VALUE
- Conservation (91%) and minimal environmental impact (90%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (74%) and paying more for a clear conservation benefit (78%) compare with 75% and 75% for the segment.
- 96% agree hunting is part of responsible, sustainable use of natural resources. (See slides 88, 91–92)

WHAT HOLDS THEM BACK
- Cost (34%), safety concerns (25%) and wildfires and other disruptions (23%) are the leading barriers.
- 49% say financial pressures have affected their travel plans. (See slides 122–125)

WHAT WOULD GROW THEM
- Better value (45%), improved access infrastructure (40%) and quality paid accommodation (35%) would most encourage longer stays.
- 82% are likely to visit in the next two years (above the segment's 75%).
- Among those who know the region, Northern Ontario's NPS is 37 (segment 34). (See slides 97, 103, 116–117)

WHERE TO REACH THEM
- Word of mouth (58%), general search (43%) and social media content (35%) are the leading planning sources.
- Among social media users, YouTube (78%), Facebook (67%) and Instagram (62%) lead.
- 64% are likely to use AI tools to plan their next trip. (See slides 58–59, 61, 65)

OLDER FRIENDS – HUNTING

ESTIMATED OPPORTUNITY POOL: 444,285

WHO THEY ARE
- Older friend groups are the most experienced hunters (79% for more than 10 years) but the least engaged with Northern Ontario: 42% have visited recently and 57% are likely to visit, with cost the main barrier (51%).
- 28% have children under 18 at home, and the largest age group is 55 to 64 (51%).
- 79% have been hunting for more than 10 years (the highest of any traveller type), and 46% use local outfitters or operators alongside their own gear.
- White-tailed deer (90%) and small game (59%) are the most targeted game. (See slides 35, 37, 50)

HOW THEY TRAVEL
- 42% have hunted in Northern Ontario in the past five years (the lowest of any traveller type), averaging 1.1 trips.
- Their most recent trip lasted 3.9 nights at $3,535 per party, and 70% stayed in paid roofed lodging.
- Backcountry camping (51%) and commercial cottages or cabins (46%) are the preferred lodging options.
- Northeast Ontario (25%) and Algoma Country (16%) are the most visited regions, and fall (79%) and winter (46%) the preferred seasons. (See slides 45, 113, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Connection with nature (74%) and escape from everyday stress (67%) are the leading motivations.
- Bonding with friends or family follows (64%).
- Scenic driving (53%) and Northern Lights viewing (52%) are the strongest add-on experiences. (See slides 69–70, 73–74)

WHAT THEY VALUE
- Conservation (88%) and supporting local businesses (86%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (72%) and paying more for a clear conservation benefit (67%) compare with 75% and 75% for the segment.
- 95% agree hunting is part of responsible, sustainable use of natural resources. (See slides 88, 91–92)

WHAT HOLDS THEM BACK
- Cost (51%), transportation costs (38%) and expensive licensing or permits (37%) are the leading barriers.
- 50% say financial pressures have affected their travel plans. (See slides 122–125)

WHAT WOULD GROW THEM
- Better value (44%), improved access infrastructure (30%) and events timed to their travel (30%) would most encourage longer stays.
- 57% are likely to visit in the next two years (the lowest of any traveller type).
- Among those who know the region, Northern Ontario's NPS is 24 (segment 34). (See slides 97, 103, 116–117)

WHERE TO REACH THEM
- Word of mouth (65%), general search (40%) and outdoor magazines (39%) are the leading planning sources.
- Among social media users, Facebook (88%), YouTube (78%) and Instagram (42%) lead.
- 51% are likely to use AI tools to plan their next trip (the lowest of any traveller type). (See slides 58–59, 61, 65)



TRAVELLER & AVIDITY

YEARS HUNTING – MARKET

All hunters

More than half of hunters (56%) have been hunting for more than 10 years and a quarter (25%) for 6 to 10 years. Fifteen percent have been hunting for 2 to 5 years, and 4% for less than 2 years.

Rest of Canada hunters are the most likely to have been hunting for more than 10 years (66%) and U.S. Fly hunters the least likely (46%), although market differences are not significant.

Years hunting	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Less than 2 years	4%	2%	3%	8%
2 to 5 years	15%	12%	14%	15%
6 to 10 years	25%	20%	25%	32%
More than 10 years	56%	66%	58%	46%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). A1 How many years have you been participating in hunting as a hobby or recreational pursuit?

YEARS HUNTING – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Older friend groups (79%) and older families (77%) are more likely than other traveller types to have been hunting for more than 10 years.

Younger families and younger friend groups are more likely to have been hunting for 2 to 5 years (23% each), and younger friend groups for 6 to 10 years (34%).

Years hunting	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Less than 2 years	4%	5%	5%	6%	0%
2 to 5 years	15%	23% ▲	3% ▼	23% ▲	7%
6 to 10 years	25%	32%	16%	34% ▲	14% ▼
More than 10 years	56%	39% ▼	77% ▲	37% ▼	79% ▲

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

Base: all hunters (n=445). A1 How many years have you been participating in hunting as a hobby or recreational pursuit?

GAME TYPES TARGETED ON HUNTING TRIPS – MARKET

All hunters

White-tailed deer is the most commonly targeted game (81%), followed by small game (59%), upland birds (54%) and waterfowl (48%). A third of hunters target elk or caribou (33%) and a quarter moose (25%).

Rest of Canada hunters are more likely than other markets to target moose (59%) and less likely to target small game (31%) or waterfowl (25%), while U.S. Drive hunters are less likely to target moose (19%).

Game type	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
White-tailed deer	81%	82%	83%	80%
Small game (rabbits, squirrels)	59%	31% ▼	62%	61%
Upland birds (grouse, pheasant, turkey)	54%	43%	58%	45%
Waterfowl (ducks, geese)	48%	25% ▼	52%	55%
Elk / caribou	33%	37%	32%	32%
Moose	25%	59% ▲	19% ▼	17%
Bear	21%	29%	19%	26%
Wolf	6%	7%	6%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). A6 Which of the following game types do you typically target on a hunting trip? Please select all that apply.

"Not sure" (0%) not shown.

GAME TYPES TARGETED ON HUNTING TRIPS – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

White-tailed deer is the most commonly targeted game for every traveller type, from 76% among younger families to 90% among older friend groups.

None of the traveller type differences are significant.

Game type	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
White-tailed deer	81%	76%	87%	80%	90%
Small game (rabbits, squirrels)	59%	62%	50%	67%	59%
Upland birds (grouse, pheasant, turkey)	54%	56%	58%	49%	55%
Waterfowl (ducks, geese)	48%	57%	51%	42%	47%
Elk / caribou	33%	33%	29%	40%	32%
Moose	25%	23%	25%	31%	20%
Bear	21%	26%	22%	24%	10%
Wolf	6%	10%	6%	6%	3%

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

Base: all hunters (n=445). A6 Which of the following game types do you typically target on a hunting trip? Please select all that apply.

"Not sure" (0%) not shown.

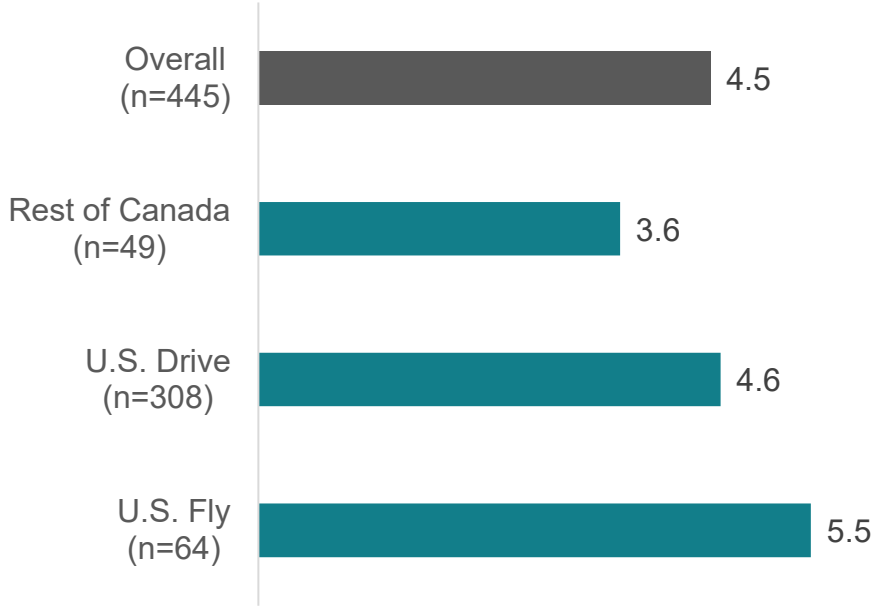
HUNTING TRIPS PER YEAR

All hunters | Traveller types are defined on slide 10

Hunters take an average of 4.5 overnight trips per year where hunting is the primary purpose.

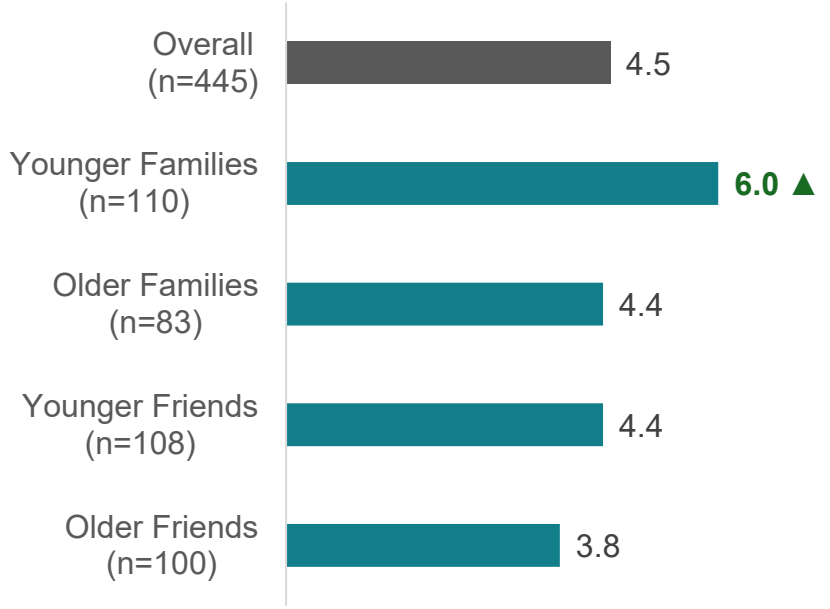
Younger families take more trips than other traveller types (6.0). Among markets, averages range from 3.6 trips among Rest of Canada hunters to 5.5 among U.S. Fly hunters.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all hunters (n=445). A3 Approximately how many overnight trips per year do you take where hunting is the primary purpose? AVG = average number of overnight trips per year.

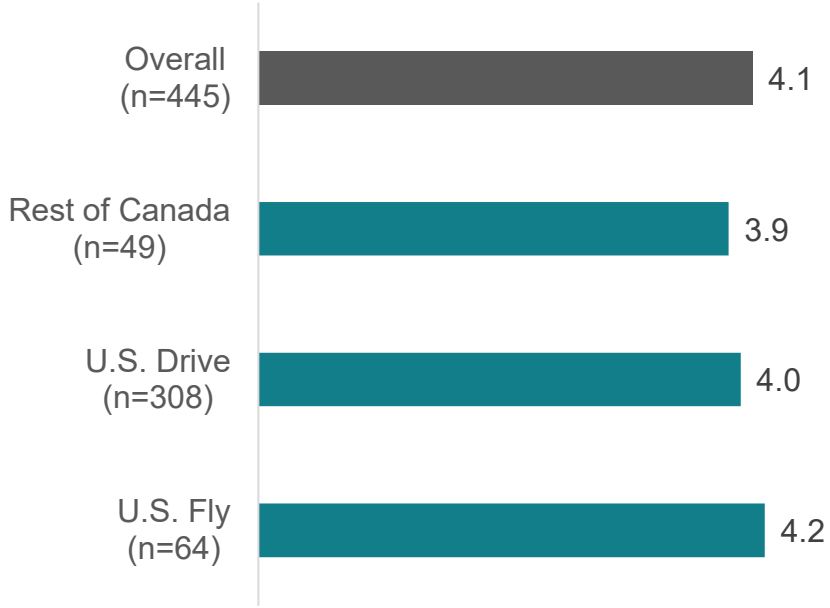
NIGHTS PER HUNTING TRIP

All hunters | Traveller types are defined on slide 10

Hunting trips last an average of 4.1 nights.

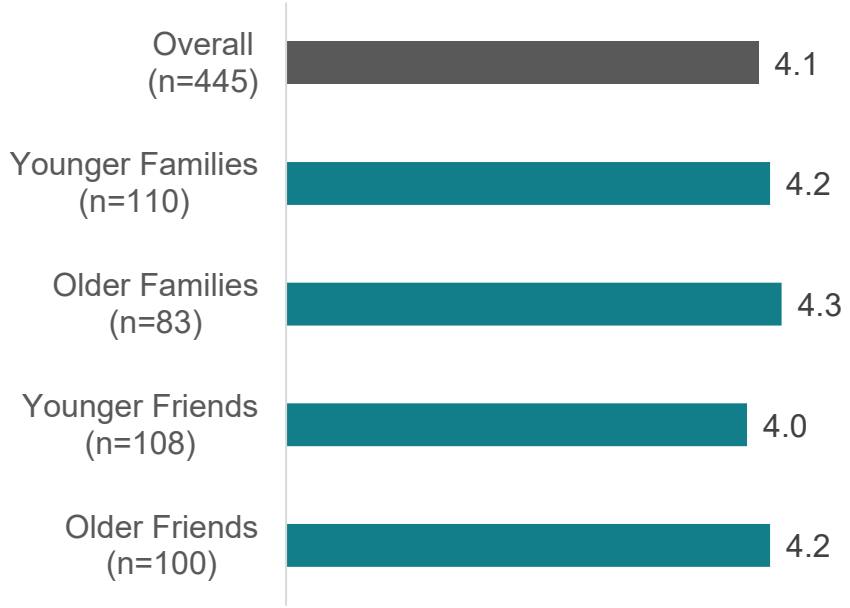
Trip length ranges from 3.9 nights among Rest of Canada hunters to 4.2 among U.S. Fly hunters, and from 4.0 nights among younger friend groups to 4.3 among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all hunters (n=445). A4 How many nights do you typically spend on a hunting trip? AVG = average number of nights.

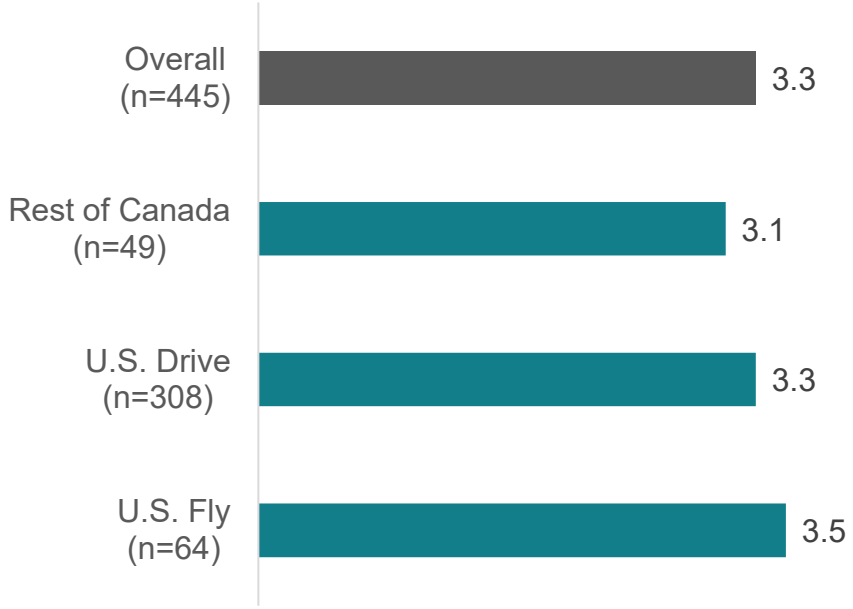
NUMBER OF PEOPLE TRAVELLED WITH ON HUNTING TRIPS

All hunters | Traveller types are defined on slide 10

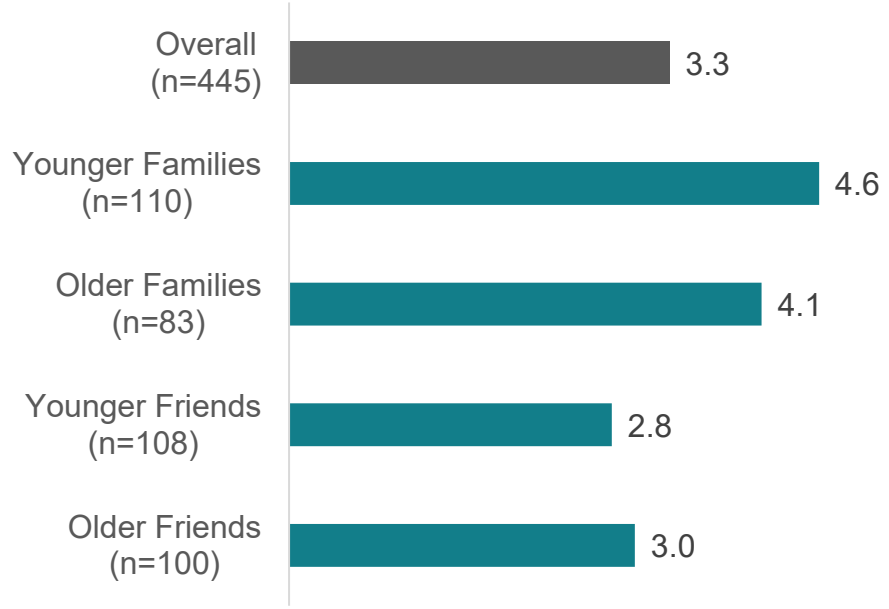
Hunters typically travel with an average of 3.3 people on a hunting trip.

Families travel in the largest groups, with younger families averaging 4.6 people and older families 4.1, while younger friend groups average 2.8. Among markets, group size ranges from 3.1 among Rest of Canada hunters to 3.5 among U.S. Fly hunters.

MARKET



TRAVELLER TYPE



Base: all hunters (n=445). A5 How many people do you typically travel with on a hunting trip? AVG = sum of the average number of people reported for each category (partner or spouse, friends, children, other). Significance testing is not available for the combined average.

FIRST EXPOSURE TO HUNTING – MARKET

All hunters

Most hunters got their first exposure to hunting through a family member (73%), and 18% through friends or peers.

Rest of Canada hunters are the most likely to have discovered hunting on their own (14%), although market differences are not significant.

First exposure	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
A family member	73%	61%	73%	78%
School, camp, or organized program	4%	1%	5%	2%
Friends or peers	18%	24%	18%	12%
I discovered it on my own	5%	14%	4%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). A8 Where did you get your first exposure to hunting?
"Not sure" (0%) not shown.

FIRST EXPOSURE TO HUNTING – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

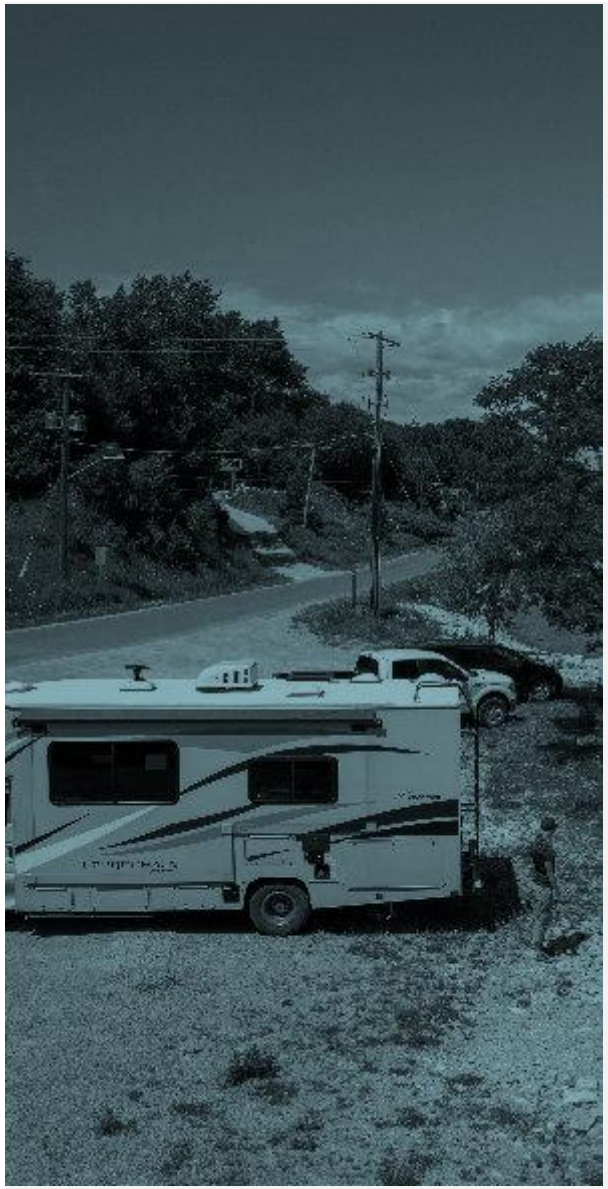
Older families are the most likely to have been introduced by a family member (82%), and younger friend groups by friends or peers (27%).

None of the traveller type differences are significant.

First exposure	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
A family member	73%	73%	82%	63%	71%
School, camp, or organized program	4%	6%	4%	6%	0%
Friends or peers	18%	14%	10%	27%	24%
I discovered it on my own	5%	7%	3%	4%	4%

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

Base: all hunters (n=445). A8 Where did you get your first exposure to hunting?
"Not sure" (0%) not shown.



HOW THEY TRAVEL

PREFERRED SEASON FOR HUNTING – MARKET

All hunters

Fall is the preferred hunting season for three-quarters of hunters (76%), followed by winter (49%), spring (37%) and summer (27%).

U.S. Fly hunters are more likely than other markets to prefer winter (65%) and less likely to prefer fall (53%), while Rest of Canada hunters are less likely to prefer winter (25%).

Season	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Winter (December – February)	49%	25% ▼	52%	65% ▲
Spring (March – May)	37%	21%	38%	41%
Summer (June – August)	27%	15%	27%	32%
Fall (September – November)	76%	92%	79%	53% ▼

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). T1 What is your preferred season for taking a hunting trip? Please select all that apply. "Not sure" (0%) not shown.

PREFERRED SEASON FOR HUNTING – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer summer (38%), and older friend groups less likely (14%).

Fall is the most preferred season for every traveller type, from 71% among younger families to 83% among older families.

Season	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Winter (December – February)	49%	51%	61%	44%	46%
Spring (March – May)	37%	46%	35%	37%	28%
Summer (June – August)	27%	38% ▲	22%	32%	14% ▼
Fall (September – November)	76%	71%	83%	75%	79%

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

Base: all hunters (n=445). T1 What is your preferred season for taking a hunting trip? Please select all that apply. "Not sure" (0%) not shown.

HOW HUNTERS GET TO THEIR DESTINATIONS – MARKET

All hunters

Most hunters get to their destinations by personal vehicle (83%), and half (54%) with a trailer. A quarter (26%) fly to a regional hub and then drive, 18% use an RV or motorhome and 11% a float plane or charter flight.

None of the market differences are significant.

Mode of travel	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Personal vehicle (car, truck, SUV)	83%	81%	84%	79%
Personal vehicle with trailer (e.g., boat, camper, ATV)	54%	55%	55%	47%
Fly to a regional hub, then drive	26%	15%	26%	29%
RV / motorhome	18%	13%	19%	22%
Float plane or charter flight to a remote destination	11%	8%	12%	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). T3 How do you typically get to your hunting destinations? Please select all that apply. “Not sure” (0%) not shown.

HOW HUNTERS GET TO THEIR DESTINATIONS – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Older friend groups are less likely than other traveller types to travel by RV or motorhome (7%).

Float plane or charter use is highest among younger families and older families (17% each) and lowest among older friend groups (4%), although these differences are not significant.

Mode of travel	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Personal vehicle (car, truck, SUV)	83%	83%	86%	78%	84%
Personal vehicle with trailer (e.g., boat, camper, ATV)	54%	55%	51%	48%	61%
Fly to a regional hub, then drive	26%	28%	28%	29%	21%
RV / motorhome	18%	24%	21%	24%	7% ▼
Float plane or charter flight to a remote destination	11%	17%	17%	10%	4%

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

Base: all hunters (n=445). T3 How do you typically get to your hunting destinations? Please select all that apply. "Not sure" (0%) not shown.

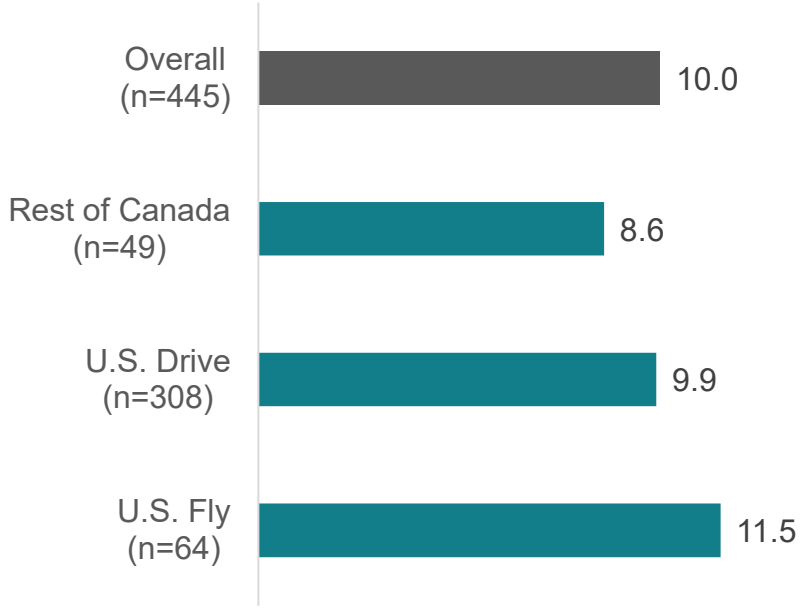
HOURS WILLING TO TRAVEL FOR A HUNTING TRIP

All hunters | Traveller types are defined on slide 10

Hunters are willing to travel an average of 10.0 hours one way for a hunting trip.

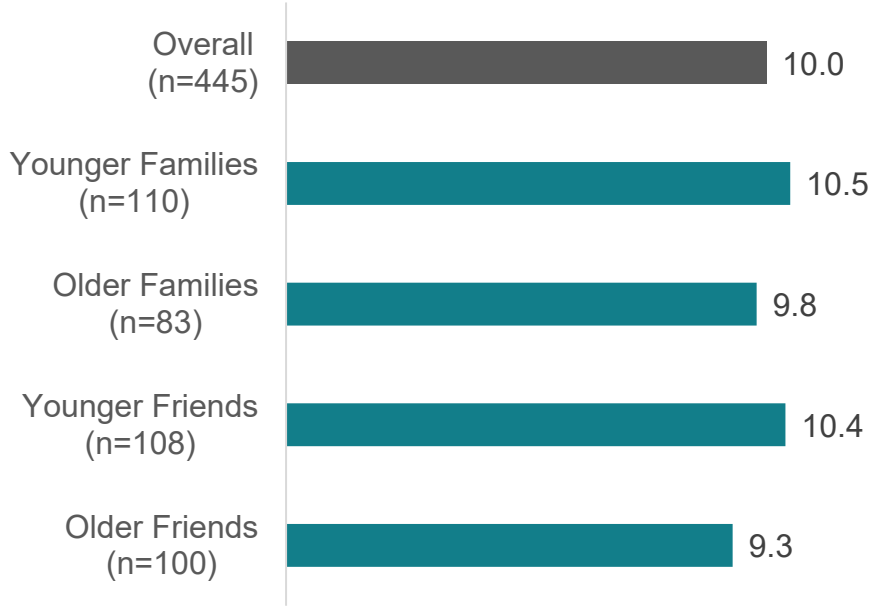
Travel time ranges from 8.6 hours among Rest of Canada hunters to 11.5 among U.S. Fly hunters, and from 9.3 hours among older friend groups to 10.5 among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all hunters (n=445). T4 Approximately how many hours are you willing to travel (one way) for a hunting trip? AVG = average number of hours.

APPROACH TO GEAR AND OUTFITTER USE – MARKET

All hunters

Hunters are evenly split between those who use their own gear without local outfitters or operators (47%) and those who also use local outfitters or operators for additional services (51%). Only 2% rely on outfitters, lodges or operators for most of their needs.

U.S. Drive hunters are more likely than other markets to also use local outfitters or operators (56%), while Rest of Canada hunters are more likely to rely on their own gear only (70%).

Approach	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
I have my own gear and do not use local outfitters or operators for supplies or services	47%	70% ▲	42% ▼	51%
I have my own gear but also use local outfitters or operators for additional supplies or services	51%	28% ▼	56% ▲	46%
I rely on outfitters, lodges, or operators for most knowledge, supplies, and services	2%	1%	2%	3%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). T5 Which of the following best describes your approach to hunting gear and outfitter use on overnight trips?

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

APPROACH TO GEAR AND OUTFITTER USE – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to rely on outfitters, lodges or operators for most of their needs (5%).

Use of local outfitters or operators alongside their own gear ranges from 46% among older friend groups to 54% among younger families and younger friend groups.

Approach	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
I have my own gear and do not use local outfitters or operators for supplies or services	47%	41%	47%	44%	54%
I have my own gear but also use local outfitters or operators for additional supplies or services	51%	54%	51%	54%	46%
I rely on outfitters, lodges, or operators for most knowledge, supplies, and services	2%	5% ▲	1%	1%	0%

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

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

Base: all hunters (n=445). T5 Which of the following best describes your approach to hunting gear and outfitter use on overnight trips?

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

INDEPENDENT VS. GUIDED HUNTING – MARKET

All hunters

More than half of hunters (57%) mainly go fully self-guided, and four in ten (41%) use a mix of guided and self-guided experiences. Only 1% mainly use guided or outfitted experiences.

Rest of Canada hunters are the most likely to go fully self-guided (70%), although market differences are not significant.

Approach	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
I mainly go on my own or with my own group – fully self-guided	57%	70%	56%	56%
I use a mix of guided and self-guided	41%	30%	43%	42%
I mainly use guided or outfitted experiences provided by operators	1%	0%	1%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). T6 When you go on a hunting trip, do you mainly go independently or use guided/outfitted experiences?

"Not sure" (0%) not shown.

INDEPENDENT VS. GUIDED HUNTING – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

A mix of guided and self-guided hunting ranges from 37% among older friend groups to 46% among younger friend groups.

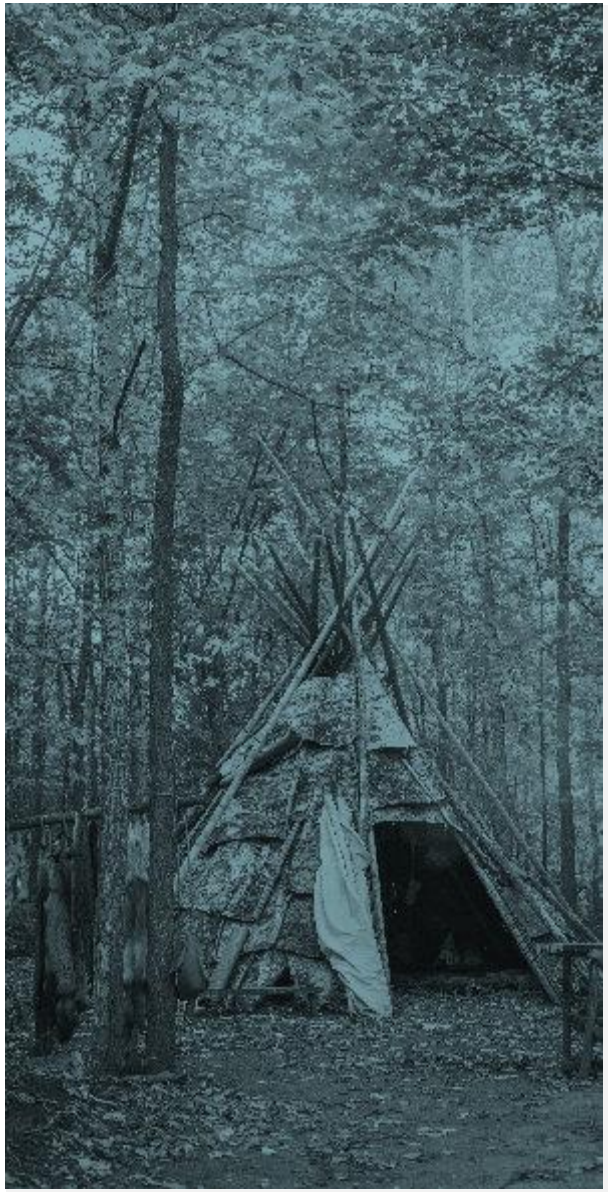
None of the traveller type differences are significant.

Approach	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
I mainly go on my own or with my own group – fully self-guided	57%	55%	56%	52%	63%
I use a mix of guided and self-guided	41%	44%	44%	46%	37%
I mainly use guided or outfitted experiences provided by operators	1%	1%	0%	2%	0%

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

Base: all hunters (n=445). T6 When you go on a hunting trip, do you mainly go independently or use guided/outfitted experiences?

"Not sure" (0%) not shown.



PLANNING & BOOKING

PLANNING LEAD TIME FOR HUNTING TRIPS – MARKET

All hunters

Most hunters begin planning one to three months (37%) or three to six months (33%) in advance, and a fifth (21%) six to twelve months ahead.

Rest of Canada hunters plan further ahead, being more likely than other markets to plan six to twelve months in advance (41%) and less likely to plan one to three months ahead (16%). U.S. Fly hunters are more likely to plan three to six months ahead (49%) and less likely to plan six to twelve months ahead (8%).

Lead time	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Less than 1 month	6%	0%	7%	2%
1 to 3 months	37%	16% ▼	39%	38%
3 to 6 months	33%	38%	30%	49% ▲
6 to 12 months	21%	41% ▲	21%	8% ▼
More than 12 months in advance	3%	2%	3%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). B1 How far in advance do you typically start planning a hunting trip? "Not sure" (<1%) not shown.

PLANNING LEAD TIME FOR HUNTING TRIPS – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Planning one to three months ahead ranges from 27% among older friend groups to 41% among younger families.

None of the traveller type differences are significant.

Lead time	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Less than 1 month	6%	7%	2%	9%	2%
1 to 3 months	37%	41%	38%	36%	27%
3 to 6 months	33%	33%	36%	39%	36%
6 to 12 months	21%	19%	18%	15%	32%
More than 12 months in advance	3%	1%	6%	1%	2%

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

Base: all hunters (n=445). B1 How far in advance do you typically start planning a hunting trip? "Not sure" (<1%) not shown.

SOURCES OF INSPIRATION AND PLANNING – MARKET (1 OF 2)

All hunters

Word of mouth is the leading source of inspiration and planning for hunting trips (55%), followed by general internet search (43%), social media content (34%), outfitter or lodge websites (33%) and online travel booking or review sites (32%). About a quarter use AI tools (25%).

Rest of Canada hunters are more likely than other markets to rely on word of mouth (80%).

Source	Overall (n=439)	Rest of Canada (n=48)	U.S. Drive (n=303)	U.S. Fly (n=64)
Word of mouth (e.g., friends or family)	55%	80% ▲	52%	56%
General internet search (e.g., Google, Bing)	43%	33%	46%	38%
Social media content (e.g., Instagram, Facebook, YouTube)	34%	32%	34%	35%
Outfitter or lodge websites	33%	33%	32%	41%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	16%	36%	30%
Outdoor or sporting magazines or publications	31%	23%	32%	23%
TV shows or documentaries	29%	31%	28%	25%
Official tourism websites (e.g., national, provincial, state, regional, city)	27%	17%	29%	25%
AI tools (e.g., ChatGPT, Gemini, Copilot)	25%	20%	26%	28%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=439). B4 Which of the following do you use to find inspiration or plan your hunting trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All hunters

Each of the remaining sources is used by a quarter of hunters or fewer, led by magazines, travel guides or brochures and travel information centres (24% each).

None of the market differences are significant.

Source	Overall (n=439)	Rest of Canada (n=48)	U.S. Drive (n=303)	U.S. Fly (n=64)
Magazines, travel guides or brochures	24%	26%	23%	26%
Travel information centres or visitor centres	24%	20%	23%	28%
Articles, blogs, or videos about travel destinations	23%	15%	25%	26%
Social media influencers	21%	7%	21%	29%
Forums or online communities	21%	12%	20%	22%
Consumer shows/exhibitions	15%	21%	12%	16%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	14%	16%	14%	11%
Travel agents	13%	6%	14%	11%
Email newsletters	8%	6%	9%	5%
Travel-related phone lines or hotlines	8%	4%	9%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=439). B4 Which of the following do you use to find inspiration or plan your hunting trips? Please select all that apply.

"Not sure" (1%) not shown.

SOURCES OF INSPIRATION AND PLANNING – TRAVELLER TYPE (1 OF 2)

All hunters | Traveller types are defined on slide 10

Younger families are less likely than other traveller types to rely on word of mouth (41%).

Use of AI tools ranges from 14% among older friend groups to 30% among younger families, although this difference is not significant.

Source	Overall (n=439)	Younger Families (n=108)	Older Families (n=83)	Younger Friends (n=107)	Older Friends (n=97)
Word of mouth (e.g., friends or family)	55%	41% ▼	56%	58%	65%
General internet search (e.g., Google, Bing)	43%	47%	37%	43%	40%
Social media content (e.g., Instagram, Facebook, YouTube)	34%	37%	37%	35%	28%
Outfitter or lodge websites	33%	29%	37%	29%	37%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	29%	36%	32%	27%
Outdoor or sporting magazines or publications	31%	21%	32%	31%	39%
TV shows or documentaries	29%	26%	29%	30%	33%
Official tourism websites (e.g., national, provincial, state, regional, city)	27%	24%	22%	29%	32%
AI tools (e.g., ChatGPT, Gemini, Copilot)	25%	30%	26%	29%	14%

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

Base: all hunters (n=439). B4 Which of the following do you use to find inspiration or plan your hunting trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All hunters | Traveller types are defined on slide 10

Older friend groups are the least likely to use specialized apps (7%) and travel agents (7%).

None of the traveller type differences are significant.

Source	Overall (n=439)	Younger Families (n=108)	Older Families (n=83)	Younger Friends (n=107)	Older Friends (n=97)
Magazines, travel guides or brochures	24%	19%	32%	23%	25%
Travel information centres or visitor centres	24%	20%	24%	26%	22%
Articles, blogs, or videos about travel destinations	23%	19%	24%	22%	27%
Social media influencers	21%	27%	20%	22%	14%
Forums or online communities	21%	17%	20%	25%	19%
Consumer shows/exhibitions	15%	12%	15%	14%	19%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	14%	12%	20%	20%	7%
Travel agents	13%	16%	15%	15%	7%
Email newsletters	8%	9%	11%	5%	9%
Travel-related phone lines or hotlines	8%	13%	7%	6%	5%

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

Base: all hunters (n=439). B4 Which of the following do you use to find inspiration or plan your hunting trips? Please select all that apply.

“Not sure” (1%) not shown.

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – MARKET

Hunters who use social media to plan

YouTube (82%) and Facebook (77%) are the most used social media platforms for hunting information, followed by Instagram (61%) and TikTok (45%).

Instagram use is highest among U.S. Fly hunters (81%). The Rest of Canada base is small, and none of the market differences are significant.

Platform	Overall (n=176)	Rest of Canada* (n=16)	U.S. Drive (n=124)	U.S. Fly* (n=26)
YouTube	82%	77%	82%	84%
Facebook	77%	68%	80%	76%
Instagram	61%	26%	59%	81%
TikTok	45%	28%	47%	48%
Reddit	37%	18%	41%	36%
X (formerly known as Twitter)	37%	20%	37%	49%
Snapchat	24%	4%	26%	22%
WhatsApp	22%	0%	22%	24%
Pinterest	21%	0%	23%	30%
Threads	16%	0%	18%	16%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who use social media to plan (B4) (n=176). B4B Which social media platforms do you use to obtain information about your hunting trips? Please select all that apply.

"Not sure" (1%) not shown.

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

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – TRAVELLER TYPE

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

Older friend groups are the most likely to use Facebook (88%) and the least likely to use Instagram (42%) and TikTok (18%), although traveller type differences are not significant.

Platform	Overall (n=176)	Younger Families (n=52)	Older Families (n=33)	Younger Friends (n=45)	Older Friends (n=31)
YouTube	82%	86%	81%	78%	78%
Facebook	77%	75%	78%	67%	88%
Instagram	61%	74%	63%	62%	42%
TikTok	45%	53%	47%	53%	18%
Reddit	37%	30%	48%	44%	26%
X (formerly known as Twitter)	37%	49%	37%	33%	23%
Snapchat	24%	31%	32%	21%	9%
WhatsApp	22%	30%	19%	19%	14%
Pinterest	21%	29%	25%	20%	13%
Threads	16%	14%	26%	13%	15%

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

Base: hunters who use social media to plan (B4) (n=176). B4B Which social media platforms do you use to obtain information about your hunting trips? Please select all that apply.

"Not sure" (1%) not shown.

HOW HUNTING TRIPS ARE BOOKED – MARKET

All hunters

Half of hunters book directly with accommodation providers (52%), and 45% through an online booking platform. Four in ten book informally through friends or personal contacts (41%) and 38% directly with outfitters or guides.

Rest of Canada hunters are less likely than other markets to book through an online booking platform (21%).

Booking method	Overall (n=441)	Rest of Canada (n=49)	U.S. Drive (n=304)	U.S. Fly (n=64)
Directly with accommodation providers (lodge, hotel, cottage)	52%	47%	53%	56%
Through an online booking platform (e.g., Booking.com, Expedia)	45%	21% ▼	49%	48%
Informally through friends or personal contacts	41%	42%	40%	43%
Directly with outfitters or guides	38%	38%	39%	35%
Through a travel agent or tour operator	23%	7%	26%	22%
Through a sporting or outdoor club or association	19%	9%	19%	26%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=441). B2 How do you typically book your hunting trips? Please select all that apply. "Not sure" (1%) not shown.

HOW HUNTING TRIPS ARE BOOKED – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Older families are the most likely to book directly with accommodation providers (61%), and younger families through a travel agent or tour operator (28%) or a sporting or outdoor club (25%).

None of the traveller type differences are significant.

Booking method	Overall (n=441)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=107)	Older Friends (n=99)
Directly with accommodation providers (lodge, hotel, cottage)	52%	52%	61%	51%	43%
Through an online booking platform (e.g., Booking.com, Expedia)	45%	46%	46%	47%	38%
Informally through friends or personal contacts	41%	45%	35%	41%	42%
Directly with outfitters or guides	38%	43%	40%	37%	30%
Through a travel agent or tour operator	23%	28%	25%	22%	19%
Through a sporting or outdoor club or association	19%	25%	17%	20%	16%

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

Base: all hunters (n=441). B2 How do you typically book your hunting trips? Please select all that apply. "Not sure" (1%) not shown.

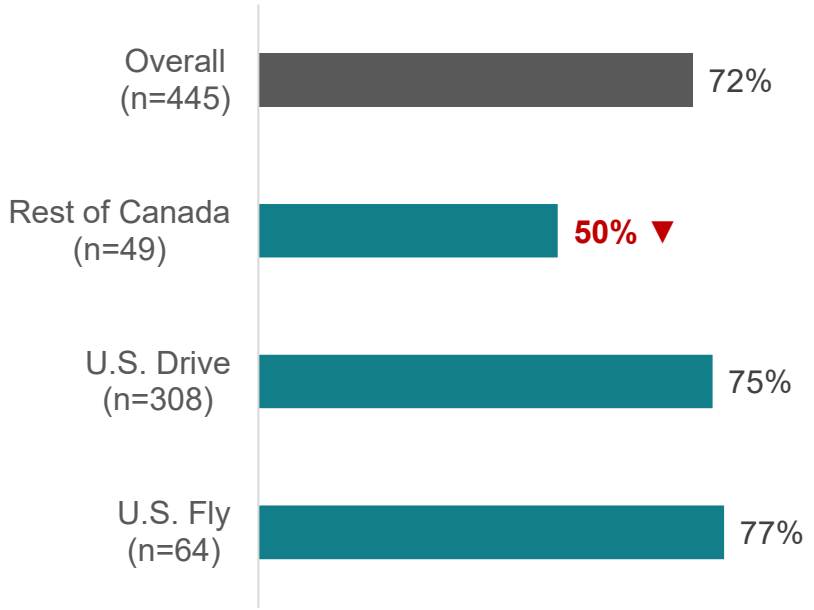
IMPORTANCE OF WORKING WITH LOCAL OPERATORS

All hunters | Traveller types are defined on slide 10

Seven in ten hunters (72%) say working with a local outfitter, guide, operator or accommodation provider is important when planning a hunting trip.

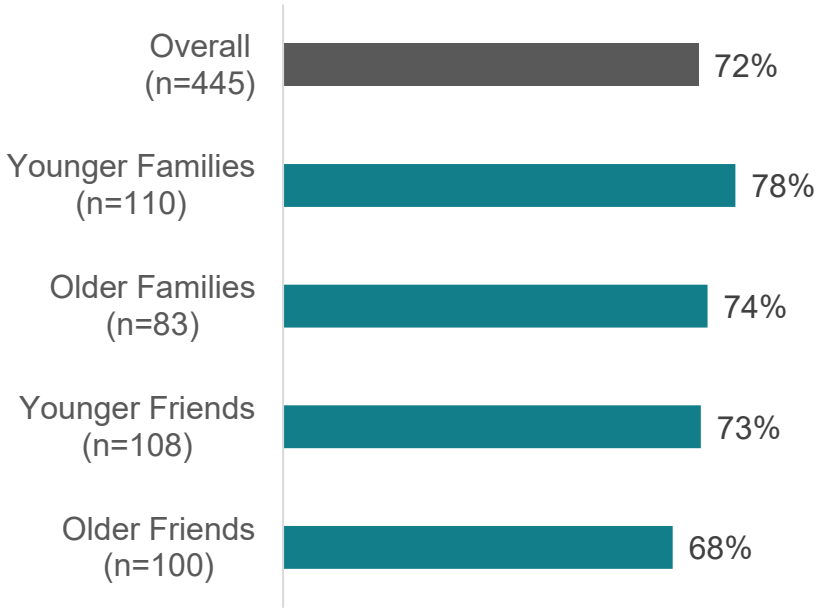
Rest of Canada hunters are less likely than other markets to say it is important (50%). Among traveller types, importance ranges from 68% among older friend groups to 78% among younger families.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all hunters (n=445). B3 (TOP2) When planning a hunting trip, how important is working with a local outfitter, guide, operator or accommodation provider? TOP2 = % somewhat or very important.

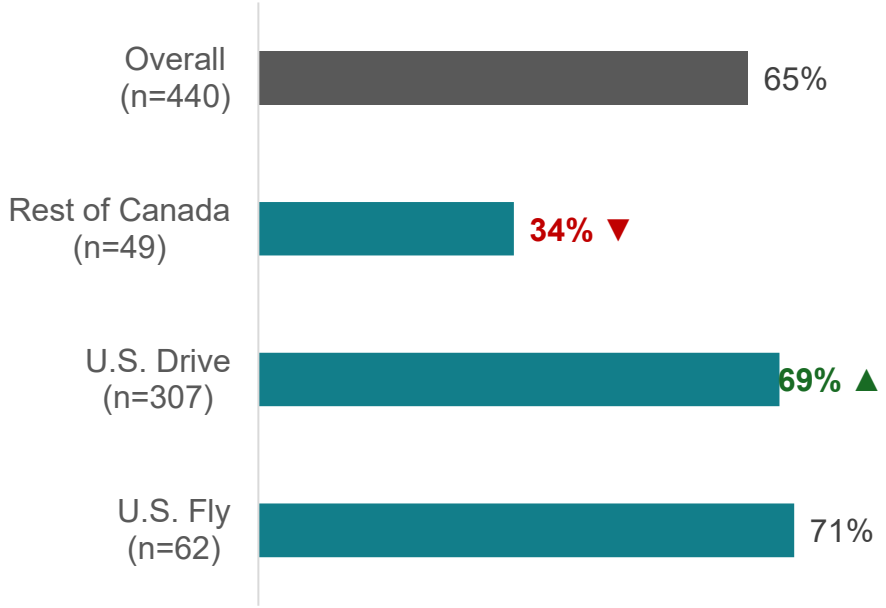
LIKELIHOOD OF USING AI TOOLS TO PLAN

All hunters | Traveller types are defined on slide 10

Two-thirds of hunters (65%) are likely to use AI tools to help plan their next hunting trip.

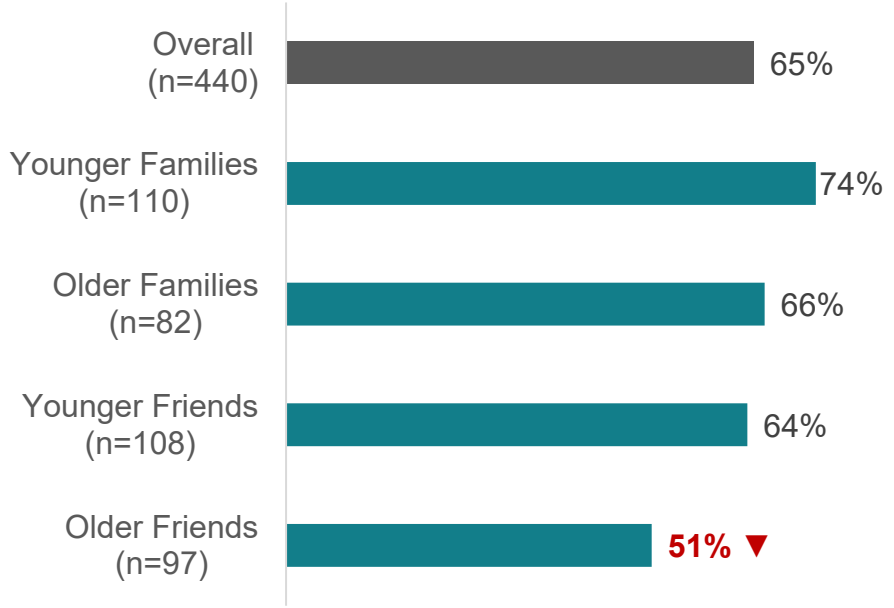
U.S. Drive hunters are more likely than other markets to use AI tools (69%), and Rest of Canada hunters less likely (34%). Older friend groups are less likely than other traveller types (51%), and younger families the most likely (74%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all hunters, excluding “Don’t know” (n=440). B5 (TOP2) How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next hunting trip? TOP2 = % somewhat or very likely.



MOTIVATION & VALUES

MOTIVATIONS FOR HUNTING – MARKET (1 OF 2)

All hunters

Connection with nature and the outdoors (57%), thrill, challenge or adventure (56%), escape from everyday stress (54%) and bonding with friends or family (53%) are hunters' leading motivations, followed by wildlife encounters (52%) and experiencing new places (47%).

U.S. Fly hunters are the most likely to be motivated by experiencing new places and landscapes (61%), although market differences are not significant.

Motivation	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Connection with nature and the outdoors	57%	64%	56%	55%
Thrill, challenge, or sense of adventure	56%	54%	57%	59%
Escape from everyday stress and routine	54%	52%	56%	50%
Bonding with friends or family	53%	56%	52%	53%
Wildlife encounters and natural discovery	52%	43%	53%	50%
Experiencing new places and landscapes	47%	38%	47%	61%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). M1 What are your primary motivations for taking hunting trips? Please select all that apply.
"Not sure" (<1%) not shown.
"Harvesting the target species" (35%), a near-duplicate of "Catching / harvesting the target species" also shown to hunters, not shown.

MOTIVATIONS FOR HUNTING – MARKET (2 OF 2)

All hunters

Catching or harvesting the target species motivates 45% of hunters, and a third are motivated by sourcing natural, local or ethically harvested food (34%).

Rest of Canada hunters are the most likely to be motivated by catching or harvesting the target species (58%) and sourcing food (50%), although market differences are not significant.

Motivation	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Catching / harvesting the target species	45%	58%	44%	34%
Solitude and personal reflection	39%	43%	36%	46%
Sourcing natural, local, or ethically harvested food	34%	50%	33%	32%
Physical fitness and health	29%	31%	26%	36%
Tradition or cultural heritage related to the activity	27%	26%	26%	27%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). M1 What are your primary motivations for taking hunting trips? Please select all that apply.
"Not sure" (<1%) not shown.
"Harvesting the target species" (35%), a near-duplicate of "Catching / harvesting the target species" also shown to hunters, not shown.

MOTIVATIONS FOR HUNTING – TRAVELLER TYPE (1 OF 2)

All hunters | Traveller types are defined on slide 10

Older friend groups are more likely than other traveller types to be motivated by connection with nature and the outdoors (74%).

Older families and older friend groups are also the most likely to cite bonding with friends or family (65% and 64%) and escape (62% and 67%), although these differences are not significant.

Motivation	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Connection with nature and the outdoors	57%	51%	50%	56%	74% ▲
Thrill, challenge, or sense of adventure	56%	54%	57%	53%	61%
Escape from everyday stress and routine	54%	45%	62%	52%	67%
Bonding with friends or family	53%	50%	65%	48%	64%
Wildlife encounters and natural discovery	52%	48%	52%	53%	54%
Experiencing new places and landscapes	47%	41%	49%	48%	48%

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

Base: all hunters (n=445). M1 What are your primary motivations for taking hunting trips? Please select all that apply. "Not sure" (<1%) not shown.
"Harvesting the target species" (35%), a near-duplicate of "Catching / harvesting the target species" also shown to hunters, not shown.

MOTIVATIONS FOR HUNTING – TRAVELLER TYPE (2 OF 2)

All hunters | Traveller types are defined on slide 10

Younger friend groups are the most likely to be motivated by physical fitness and health (40%), and older friend groups by catching or harvesting the target species (57%).

None of the traveller type differences are significant.

Motivation	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Catching / harvesting the target species	45%	43%	45%	34%	57%
Solitude and personal reflection	39%	30%	44%	34%	48%
Sourcing natural, local, or ethically harvested food	34%	37%	35%	31%	39%
Physical fitness and health	29%	28%	23%	40%	22%
Tradition or cultural heritage related to the activity	27%	27%	31%	31%	18%

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

Base: all hunters (n=445). M1 What are your primary motivations for taking hunting trips? Please select all that apply. "Not sure" (<1%) not shown.
"Harvesting the target species" (35%), a near-duplicate of "Catching / harvesting the target species" also shown to hunters, not shown.

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

All hunters

Northern Lights or dark sky viewing (46%), wildlife viewing (45%) and scenic driving (44%) are the experiences most likely to enhance a hunting trip, followed by multi-activity packages (38%) and culinary experiences (37%).

U.S. Fly hunters are the most interested in culinary experiences (51%), although market differences are not significant.

Experience	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Northern Lights or dark sky viewing experiences	46%	40%	48%	39%
Wildlife viewing separate from hunting or fishing	45%	34%	48%	38%
Scenic driving or road trip components	44%	32%	46%	46%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	38%	32%	37%	42%
Culinary experiences featuring locally sourced or freshly caught / harvested food	37%	43%	33%	51%
Visiting local breweries or distilleries	36%	26%	36%	36%
Visting local markets, retail and artisans	36%	31%	35%	39%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.

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

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

All hunters

A quarter of hunters are interested in Indigenous-led cultural or land-based experiences (25%), and about a fifth in multi-stop regional itineraries (23%), learning opportunities (21%), wellness experiences (20%) and youth or family introduction-to-hunting programs (19%). Only 3% prefer to focus entirely on hunting.

Interest in multi-stop regional itineraries is lowest among Rest of Canada hunters (5%), although market differences are not significant.

Experience	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
All-inclusive lodge packages with guided hunting	31%	24%	29%	37%
Photography or nature interpretation guided experiences	27%	17%	30%	25%
Indigenous-led cultural or land-based experiences	25%	30%	26%	20%
Multi-stop regional itineraries combining several Northern Ontario areas	23%	5%	25%	21%
Learning and interpretation opportunities	21%	16%	21%	23%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	20%	10%	21%	19%
Youth or family-oriented introduction-to-hunting programs	19%	7%	21%	18%
None – I prefer to focus entirely on the activity	3%	5%	3%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.

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

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

All hunters | Traveller types are defined on slide 10

Older families and older friend groups are the most interested in scenic driving (52% and 53%) and Northern Lights viewing (51% and 52%), although traveller type differences on these items are not significant.

None of the traveller type differences are significant.

Experience	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Northern Lights or dark sky viewing experiences	46%	39%	51%	43%	52%
Wildlife viewing separate from hunting or fishing	45%	42%	42%	41%	51%
Scenic driving or road trip components	44%	37%	52%	37%	53%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	38%	37%	40%	41%	35%
Culinary experiences featuring locally sourced or freshly caught / harvested food	37%	33%	37%	29%	48%
Visiting local breweries or distilleries	36%	38%	38%	35%	37%
Visting local markets, retail and artisans	36%	30%	39%	40%	40%

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

Base: all hunters (n=445). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.

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

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

All hunters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in youth or family introduction-to-hunting programs (34%).

Older friend groups are the least interested in wellness experiences (10%).

Experience	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
All-inclusive lodge packages with guided hunting	31%	27%	39%	27%	31%
Photography or nature interpretation guided experiences	27%	28%	29%	26%	23%
Indigenous-led cultural or land-based experiences	25%	28%	28%	20%	25%
Multi-stop regional itineraries combining several Northern Ontario areas	23%	24%	27%	21%	21%
Learning and interpretation opportunities	21%	24%	18%	25%	15%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	20%	24%	19%	27%	10%
Youth or family-oriented introduction-to-hunting programs	19%	34% ▲	23%	16%	11%
None – I prefer to focus entirely on the activity	3%	1%	0%	5%	3%

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

Base: all hunters (n=445). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.

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

WHAT MAKES A TRIP SUCCESSFUL – MARKET (1 OF 2)

Hunters who provided a response

When asked what makes a hunting trip successful, more than half of hunters (55%) mention a successful harvest, followed by fun and enjoyment (44%), connection with nature and scenery (26%) and quality time with family and friends (26%).

None of the market differences are significant.

Theme	Overall (n=429)	Rest of Canada (n=49)	U.S. Drive (n=297)	U.S. Fly (n=60)
Successful Harvest / Catching Fish or Game	55%	49%	54%	63%
Fun & Enjoyment	44%	29%	46%	39%
Connection with Nature & Scenery	26%	18%	28%	24%
Quality Time with Family & Friends	26%	25%	28%	18%
Relaxation & Stress Relief	16%	9%	18%	13%
Accommodation & Food	15%	14%	17%	10%
Safety & No Incidents	9%	5%	7%	16%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who provided a response (n=429). M3 In your own words, what makes a hunting trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

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

Hunters who provided a response

Fewer than one in ten hunters mention each of the remaining themes, and 20% give an overall positive or general response.

Rest of Canada hunters are more likely than other markets to mention new experiences and exploration (26%) and good weather (11%).

Theme	Overall (n=429)	Rest of Canada (n=49)	U.S. Drive (n=297)	U.S. Fly (n=60)
Mental Wellness / Disconnecting from Daily Life	6%	3%	7%	1%
New Experiences & Exploration	5%	26% ▲	4%	0%
Planning & Organization	4%	1%	4%	3%
Good Weather	2%	11% ▲	1%	2%
Physical Activity & Exercise	2%	0%	2%	0%
Affordability & Value for Money	1%	1%	2%	0%
Overall Positive / General Satisfaction	20%	11%	21%	27%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who provided a response (n=429). M3 In your own words, what makes a hunting trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

WHAT MAKES A TRIP SUCCESSFUL – TRAVELLER TYPE (1 OF 2)

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

A successful harvest is the most common theme for every traveller type, from 50% among younger friend groups to 59% among older friend groups.

Older friend groups are the least likely to mention quality time with family and friends (15%). None of the traveller type differences are significant.

Theme	Overall (n=429)	Younger Families (n=106)	Older Families (n=78)	Younger Friends (n=105)	Older Friends (n=98)
Successful Harvest / Catching Fish or Game	55%	52%	57%	50%	59%
Fun & Enjoyment	44%	51%	34%	53%	38%
Connection with Nature & Scenery	26%	28%	21%	32%	24%
Quality Time with Family & Friends	26%	31%	36%	30%	15%
Relaxation & Stress Relief	16%	11%	23%	11%	18%
Accommodation & Food	15%	13%	14%	15%	17%
Safety & No Incidents	9%	10%	7%	11%	7%

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

Base: hunters who provided a response (n=429). M3 In your own words, what makes a hunting trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

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

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

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

None of the traveller type differences are significant.

Theme	Overall (n=429)	Younger Families (n=106)	Older Families (n=78)	Younger Friends (n=105)	Older Friends (n=98)
Mental Wellness / Disconnecting from Daily Life	6%	4%	6%	7%	7%
New Experiences & Exploration	5%	5%	3%	5%	8%
Planning & Organization	4%	6%	2%	5%	4%
Good Weather	2%	3%	2%	1%	2%
Physical Activity & Exercise	2%	1%	0%	4%	3%
Affordability & Value for Money	1%	1%	0%	2%	0%
Overall Positive / General Satisfaction	20%	19%	16%	20%	20%

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

Base: hunters who provided a response (n=429). M3 In your own words, what makes a hunting trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – MARKET (1 OF 2)

Hunters who provided a response

Hunters see Northern Ontario's vast, untouched wilderness (44%) as its greatest advantage for hunting, followed by its scenery (28%), its lakes, rivers and water access (21%) and being less crowded (17%). Great hunting opportunities are mentioned by 7%.

None of the market differences are significant.

Advantage	Overall (n=374)	Rest of Canada (n=39)	U.S. Drive (n=260)	U.S. Fly (n=55)
Vast, Untouched Wilderness & Nature	44%	45%	44%	41%
Beautiful Scenery & Landscapes	28%	32%	27%	22%
Abundance of Lakes, Rivers & Water Access	21%	16%	20%	28%
Less Crowded / Solitude	17%	25%	16%	22%
Great Fishing Opportunities	12%	2%	15%	12%
Authenticity & Unique Experience	9%	4%	10%	8%
Great Hunting Opportunities	7%	3%	7%	13%
Unfamiliar / Open to Discovering	7%	6%	7%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who provided a response (n=374). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for hunting trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

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

Hunters who provided a response

Each of the remaining advantages is mentioned by 5% of hunters or fewer.

Rest of Canada hunters are the most likely to mention proximity to home (14%). None of the market differences are significant.

Advantage	Overall (n=374)	Rest of Canada (n=39)	U.S. Drive (n=260)	U.S. Fly (n=55)
Proximity / Accessibility from Home	5%	14%	5%	2%
Wide Range of Outdoor Activities	4%	6%	3%	9%
Northern Lights	4%	3%	4%	3%
Friendly Locals & Hospitality	3%	2%	2%	6%
Affordable / Good Value	3%	0%	3%	4%
Cultural & Indigenous Heritage	2%	0%	1%	3%
Wildlife Viewing & Biodiversity	2%	2%	2%	4%
Dark Skies & Stargazing	1%	0%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who provided a response (n=374). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for hunting trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – TRAVELLER TYPE (1 OF 2)

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

Wilderness is the top advantage for every traveller type, from 36% among younger families to 48% among younger friend groups.

Older friend groups are the most likely to describe Northern Ontario as unfamiliar or open to discovering (14%). None of the traveller type differences are significant.

Advantage	Overall (n=374)	Younger Families (n=94)	Older Families (n=73)	Younger Friends (n=85)	Older Friends (n=83)
Vast, Untouched Wilderness & Nature	44%	36%	43%	48%	41%
Beautiful Scenery & Landscapes	28%	28%	31%	26%	29%
Abundance of Lakes, Rivers & Water Access	21%	24%	24%	23%	13%
Less Crowded / Solitude	17%	13%	25%	16%	19%
Great Fishing Opportunities	12%	15%	10%	12%	11%
Authenticity & Unique Experience	9%	12%	9%	7%	8%
Great Hunting Opportunities	7%	9%	8%	7%	7%
Unfamiliar / Open to Discovering	7%	6%	5%	4%	14%

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

Base: hunters who provided a response (n=374). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for hunting trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

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

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

Each remaining advantage is mentioned by 10% or fewer in every traveller type.

None of the traveller type differences are significant.

Advantage	Overall (n=374)	Younger Families (n=94)	Older Families (n=73)	Younger Friends (n=85)	Older Friends (n=83)
Proximity / Accessibility from Home	5%	5%	10%	4%	4%
Wide Range of Outdoor Activities	4%	7%	3%	2%	3%
Northern Lights	4%	5%	1%	2%	7%
Friendly Locals & Hospitality	3%	4%	0%	3%	5%
Affordable / Good Value	3%	2%	2%	3%	1%
Cultural & Indigenous Heritage	2%	1%	3%	1%	3%
Wildlife Viewing & Biodiversity	2%	2%	2%	2%	3%
Dark Skies & Stargazing	1%	1%	0%	0%	1%

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

Base: hunters who provided a response (n=374). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for hunting trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

MEANING OF SUSTAINABLE TOURISM – MARKET (1 OF 2)

Hunters who provided a response

Hunters most often describe sustainable tourism as environmental protection and minimal impact (38%), followed by preservation for future generations (21%) and tourism that sustains itself (10%).

Rest of Canada hunters are the most likely to mention environmental protection (54%) and preservation for future generations (36%), although market differences are not significant.

Meaning	Overall (n=439)	Rest of Canada (n=49)	U.S. Drive (n=302)	U.S. Fly (n=64)
Environmental Protection & Minimal Impact	38%	54%	34%	38%
Preservation for Future Generations	21%	36%	19%	19%
Tourism That Sustains Itself / Repeat Visitation	10%	4%	11%	11%
Support for Local Communities & Economy	8%	9%	9%	4%
Respecting Wildlife & Natural Habitats	7%	5%	8%	5%
Responsible Travel Behaviour	7%	7%	7%	8%
Leave No Trace / Leave It As You Found It	6%	5%	7%	2%
Reducing Waste & Pollution	5%	8%	5%	4%
Balancing Tourism & Conservation	4%	12%	3%	1%
Eco-Friendly Practices & Green Transport	3%	6%	4%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who provided a response (n=439). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

MEANING OF SUSTAINABLE TOURISM – MARKET (2 OF 2)

Hunters who provided a response

Each remaining theme is mentioned by 3% of hunters or fewer, and 31% are unsure or give another response.

None of the market differences are significant.

Meaning	Overall (n=439)	Rest of Canada (n=49)	U.S. Drive (n=302)	U.S. Fly (n=64)
Cultural Respect & Indigenous Communities	3%	0%	3%	8%
Accessible & Inclusive Tourism	1%	1%	2%	1%
Nature-Based / Immersive Experience	1%	0%	1%	1%
Safety & Security for Tourists	1%	0%	1%	0%
Cleanliness & Well-Maintained Destinations	<1%	0%	1%	0%
General Awareness / Vague Positive	16%	21%	16%	14%
Negative Sentiment / Dismissive	<1%	0%	1%	0%
Gibberish / Incomprehensible	1%	3%	<1%	2%
Unsure / Other	31%	20%	33%	28%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who provided a response (n=439). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

MEANING OF SUSTAINABLE TOURISM – TRAVELLER TYPE (1 OF 2)

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

Environmental protection is the most common description for every traveller type, from 35% among older friend groups to 42% among younger friend groups.

None of the traveller type differences are significant.

Meaning	Overall (n=439)	Younger Families (n=109)	Older Families (n=82)	Younger Friends (n=105)	Older Friends (n=99)
Environmental Protection & Minimal Impact	38%	37%	38%	42%	35%
Preservation for Future Generations	21%	28%	19%	19%	19%
Tourism That Sustains Itself / Repeat Visitation	10%	9%	15%	8%	8%
Support for Local Communities & Economy	8%	8%	10%	10%	5%
Respecting Wildlife & Natural Habitats	7%	7%	7%	8%	7%
Responsible Travel Behaviour	7%	9%	11%	4%	7%
Leave No Trace / Leave It As You Found It	6%	8%	5%	6%	5%
Reducing Waste & Pollution	5%	3%	11%	4%	0%
Balancing Tourism & Conservation	4%	2%	7%	4%	2%
Eco-Friendly Practices & Green Transport	3%	3%	0%	6%	3%

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

Base: hunters who provided a response (n=439). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

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

Each remaining theme is mentioned by 6% or fewer in every traveller type, apart from unsure or other responses.

None of the traveller type differences are significant.

Meaning	Overall (n=439)	Younger Families (n=109)	Older Families (n=82)	Younger Friends (n=105)	Older Friends (n=99)
Cultural Respect & Indigenous Communities	3%	3%	5%	3%	3%
Accessible & Inclusive Tourism	1%	2%	2%	1%	1%
Nature-Based / Immersive Experience	1%	1%	1%	0%	2%
Safety & Security for Tourists	1%	1%	0%	1%	1%
Cleanliness & Well-Maintained Destinations	<1%	0%	0%	0%	0%
General Awareness / Vague Positive	16%	23%	5%	19%	16%
Negative Sentiment / Dismissive	<1%	0%	0%	0%	2%
Gibberish / Incomprehensible	1%	2%	0%	1%	1%
Unsure / Other	31%	28%	30%	32%	34%

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

Base: hunters who provided a response (n=439). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – MARKET

All hunters

Conservation and responsible resource management (90%), supporting local, independently owned businesses (89%) and minimal environmental impact (88%) are important considerations for nearly all hunters when choosing a destination.

U.S. Drive hunters are more likely than other markets to value learning about Indigenous culture and history (81%), and Rest of Canada hunters less likely to value it (32%) or accessibility (41%).

Consideration	Overall (n=444)	Rest of Canada (n=49)	U.S. Drive (n=307)	U.S. Fly (n=64)
Conservation and responsible resource management	90%	83%	92%	86%
Supporting local, independently owned businesses	89%	82%	89%	94%
Minimal environmental impact of tourism in the area	88%	77%	90%	89%
Community benefit – tourism dollars staying in the local community	85%	73%	86%	83%
Learning about Indigenous culture and history	75%	32% ▼	81% ▲	82%
Accessibility for people with mobility or physical needs	68%	41% ▼	71%	78%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters, excluding “Don’t know”; bases vary by item (n=442 to 444). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Each consideration is important to a large majority of every traveller type.

None of the traveller type differences are significant.

Consideration	Overall (n=444)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Conservation and responsible resource management	90%	88%	94%	91%	88%
Supporting local, independently owned businesses	89%	91%	84%	89%	86%
Minimal environmental impact of tourism in the area	88%	89%	89%	90%	85%
Community benefit – tourism dollars staying in the local community	85%	88%	82%	82%	86%
Learning about Indigenous culture and history	75%	79%	77%	74%	72%
Accessibility for people with mobility or physical needs	68%	75%	64%	71%	62%

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

Base: all hunters, excluding “Don’t know”; bases vary by item (n=442 to 444). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (1 OF 2)

All hunters

Nearly all hunters agree that hunting is part of responsible, sustainable use of natural resources (95%) and feel a personal responsibility to protect the environments they visit (92%).

None of the market differences are significant.

Statement	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Hunting is part of responsible, sustainable use of natural resources	95%	94%	94%	98%
I feel a personal responsibility to protect natural environments I visit	92%	90%	93%	93%
I am interested in sourcing natural or ethically harvested food through travel	87%	77%	87%	90%
I am interested in contributing to wildlife conservation when I travel	85%	72%	87%	93%
I would be interested in an Indigenous-led guided experience	79%	63%	82%	82%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters, excluding “Don’t know”; bases vary by item (n=441 to 445). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (2 OF 2)

All hunters

Three-quarters of hunters would pay more for a trip with a clear conservation benefit (75%) and look for accommodation or operators with a recognized certification (74%).

U.S. Drive hunters are more likely than other markets to pay more for a conservation benefit (80%), while Rest of Canada hunters are less likely to do so (41%), seek out eco-friendly options (47%) or look for certified operators (52%).

Statement	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	78%	68%	78%	90%
I actively seek out eco-friendly or sustainable travel options	76%	47% ▼	79%	84%
I would pay more for a trip that had a clear conservation benefit	75%	41% ▼	80% ▲	78%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	74%	52% ▼	77%	78%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters, excluding “Don’t know”; bases vary by item (n=441 to 445). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

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

All hunters | Traveller types are defined on slide 10

Agreement with the leading statements is high for every traveller type.

None of the traveller type differences are significant.

Statement	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Hunting is part of responsible, sustainable use of natural resources	95%	94%	94%	96%	95%
I feel a personal responsibility to protect natural environments I visit	92%	94%	92%	91%	94%
I am interested in sourcing natural or ethically harvested food through travel	87%	86%	88%	89%	83%
I am interested in contributing to wildlife conservation when I travel	85%	89%	84%	91%	78%
I would be interested in an Indigenous-led guided experience	79%	83%	77%	82%	74%

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

Base: all hunters, excluding “Don’t know”; bases vary by item (n=441 to 445). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

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

All hunters | Traveller types are defined on slide 10

Older friend groups are less likely than other traveller types to look for certified accommodation or operators (61%).

Statement	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	78%	84%	80%	79%	74%
I actively seek out eco-friendly or sustainable travel options	76%	83%	76%	81%	66%
I would pay more for a trip that had a clear conservation benefit	75%	78%	74%	78%	67%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	74%	82%	74%	77%	61% ▼

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

Base: all hunters, excluding “Don’t know”; bases vary by item (n=441 to 445). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.



AWARENESS & PERCEPTION

AWARENESS OF NORTHERN ONTARIO – MARKET

Hunters who do not live in Northern Ontario

Most hunters know a lot (42%) or a little (43%) about Northern Ontario, while 13% have heard of it but know nothing about it and only 3% have never heard of it.

Rest of Canada hunters are more likely than other markets to have never heard of Northern Ontario (13%), and U.S. Drive hunters less likely (1%).

Awareness	Overall (n=444)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
I have heard of and know a lot about it	42%	26%	45%	32%
I have heard of and know a little bit about it	43%	41%	44%	44%
I have heard of but know nothing about it	13%	20%	11%	21%
I have never heard of before	3%	13% ▲	1% ▼	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who do not live in Northern Ontario (n=444). N0 How would you best describe your awareness of Northern Ontario?

AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to know a lot about Northern Ontario (54%) and less likely to know nothing about it (7%), while older friend groups are less likely to know a lot (26%).

Awareness	Overall (n=444)	Younger Families (n=109)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
I have heard of and know a lot about it	42%	54% ▲	38%	43%	26% ▼
I have heard of and know a little bit about it	43%	38%	43%	43%	52%
I have heard of but know nothing about it	13%	7% ▼	15%	14%	18%
I have never heard of before	3%	1%	4%	1%	4%

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

Base: hunters who do not live in Northern Ontario (n=444). N0 How would you best describe your awareness of Northern Ontario?

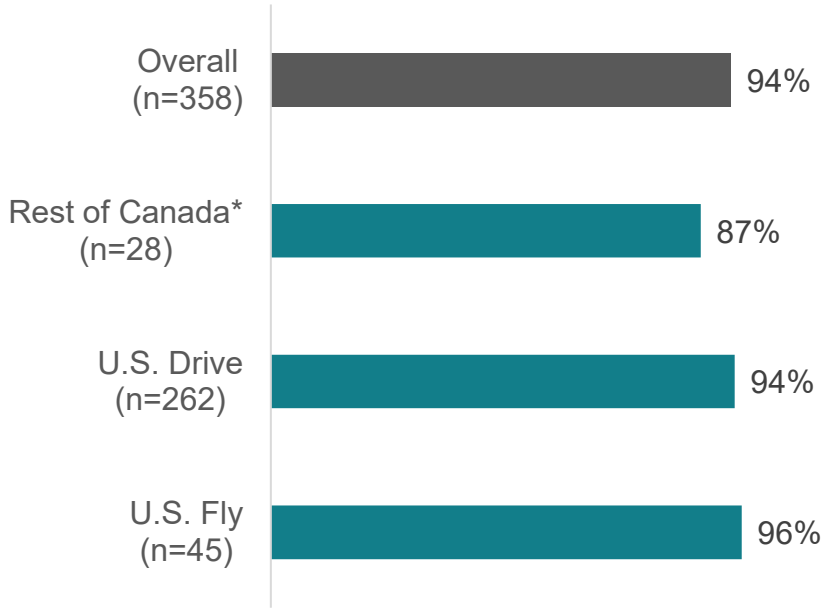
RATING OF NORTHERN ONTARIO FOR HUNTING

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

More than nine in ten hunters who know Northern Ontario (94%) rate it 4 or 5 out of 5 as a pleasure travel destination for hunting, including 50% who rate it excellent.

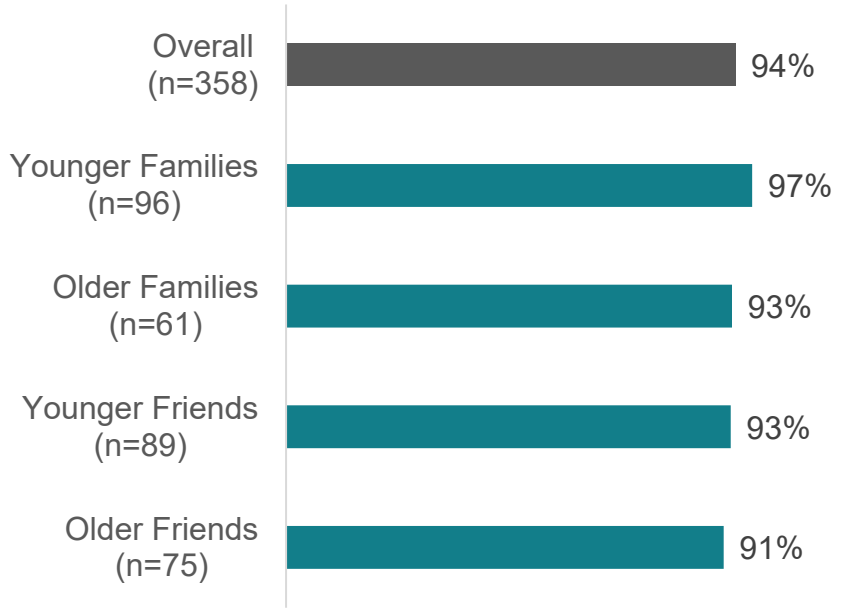
Ratings range from 87% among Rest of Canada hunters to 96% among U.S. Fly hunters, and from 91% among older friend groups to 97% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: hunters who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=358). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for hunting? TOP2 = % rating 4 or 5 (1 = Poor, 5 = Excellent). *Small base (n<30); interpret with caution.

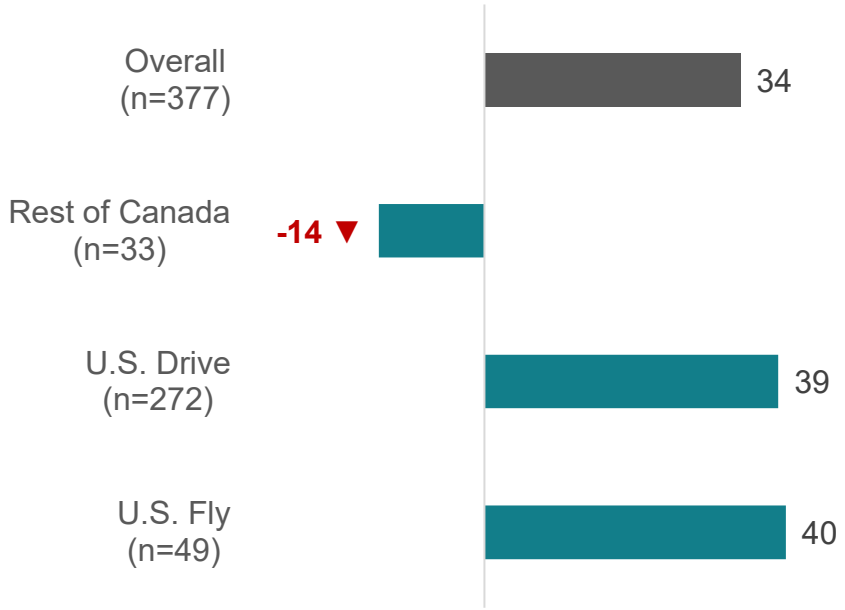
LIKELIHOOD TO RECOMMEND NORTHERN ONTARIO (NPS)

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

Northern Ontario has a Net Promoter Score (NPS) of 34 among hunters who know it, with 51% promoters and 17% detractors.

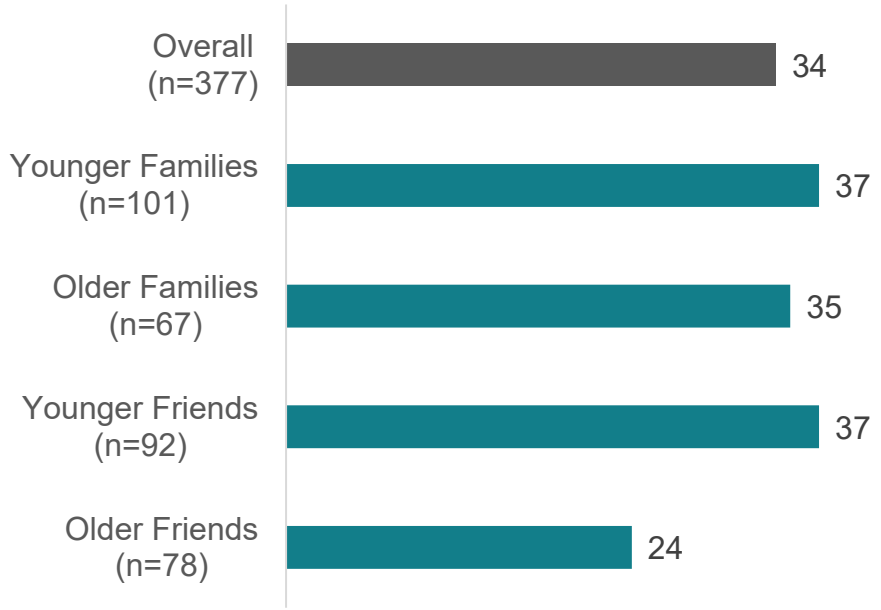
Rest of Canada hunters give a significantly lower score (-14), with 45% detractors. Among traveller types, the NPS ranges from 24 among older friend groups to 37 among younger families and younger friend groups.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: hunters who know a lot or a little about Northern Ontario (n=377). N2 (NPS) How likely would you be to recommend Northern Ontario to a friend or colleague as a destination for hunting? (0 = Not at all likely, 10 = Extremely likely) NPS = % promoters (9–10) minus % detractors (0–6).

PERCEPTIONS OF NORTHERN ONTARIO – MARKET

Hunters who know a lot or a little about Northern Ontario

Nearly all hunters who know Northern Ontario agree it offers a wide variety of hunting experiences (94%) and excellent hunting experiences (93%), and 91% would seriously consider it for hunting. Eight in ten (80%) know enough about it to plan a hunting trip, and 77% say it is better than alternatives closer to home.

Rest of Canada hunters are less likely than other markets to seriously consider Northern Ontario (68%), to know enough to plan a trip (60%) or to say it is better than alternatives closer to home (45%).

Statement	Overall (n=371)	Rest of Canada (n=32)	U.S. Drive (n=270)	U.S. Fly (n=48)
Northern Ontario offers a wide variety of hunting experiences	94%	90%	96%	91%
Northern Ontario offers excellent hunting experiences	93%	90%	94%	89%
Northern Ontario is a destination I would seriously consider for hunting	91%	68% ▼	93%	94%
Northern Ontario feels welcoming to travellers like me	89%	79%	90%	94%
I know enough about Northern Ontario to plan a hunting trip there	80%	60% ▼	84%	78%
For hunting, Northern Ontario is better than alternatives I could choose closer to home	77%	45% ▼	79%	88%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=366 to 371). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

PERCEPTIONS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Agreement with each statement is high for every traveller type.

None of the traveller type differences are significant.

Statement	Overall (n=371)	Younger Families (n=99)	Older Families (n=66)	Younger Friends (n=92)	Older Friends (n=78)
Northern Ontario offers a wide variety of hunting experiences	94%	95%	97%	93%	92%
Northern Ontario offers excellent hunting experiences	93%	91%	95%	94%	92%
Northern Ontario is a destination I would seriously consider for hunting	91%	94%	92%	92%	87%
Northern Ontario feels welcoming to travellers like me	89%	92%	89%	92%	83%
I know enough about Northern Ontario to plan a hunting trip there	80%	84%	75%	85%	77%
For hunting, Northern Ontario is better than alternatives I could choose closer to home	77%	83%	75%	74%	72%

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

Base: hunters who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=366 to 371). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – MARKET

Hunters who know a lot or a little about Northern Ontario

Hunters who know Northern Ontario agree it has excellent hunting and pristine lakes and waterways (94% each), remote, untouched wilderness (93%) and authentic campfire and wilderness experiences (92%). Good value for money is the lowest-rated attribute (84%).

Rest of Canada hunters are less likely than other markets to agree that Northern Ontario offers good value for money (49%).

Northern Ontario has…	Overall (n=373)	Rest of Canada (n=33)	U.S. Drive (n=272)	U.S. Fly (n=49)
Excellent hunting	94%	87%	95%	94%
Pristine lakes and waterways	94%	91%	95%	96%
Remote, untouched wilderness	93%	88%	95%	87%
Authentic campfire and wilderness experiences	92%	78%	94%	95%
Small, welcoming communities	91%	88%	91%	92%
Opportunities to see the Northern Lights (Aurora Borealis)	91%	81%	93%	96%
Dark skies ideal for stargazing	89%	90%	90%	86%
Rich Indigenous culture and heritage	87%	81%	89%	86%
Good value for money	84%	49% ▼	87%	87%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=365 to 373). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – TRAVELLER TYPE

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

Older families agree most strongly on remote, untouched wilderness (100%) and authentic campfire experiences (97%), although traveller type differences are not significant.

None of the traveller type differences are significant.

Northern Ontario has…	Overall (n=373)	Younger Families (n=101)	Older Families (n=66)	Younger Friends (n=92)	Older Friends (n=78)
Excellent hunting	94%	91%	96%	96%	95%
Pristine lakes and waterways	94%	90%	95%	95%	97%
Remote, untouched wilderness	93%	90%	100%	92%	93%
Authentic campfire and wilderness experiences	92%	90%	97%	91%	92%
Small, welcoming communities	91%	90%	93%	90%	91%
Opportunities to see the Northern Lights (Aurora Borealis)	91%	91%	95%	91%	91%
Dark skies ideal for stargazing	89%	86%	95%	87%	88%
Rich Indigenous culture and heritage	87%	84%	90%	85%	89%
Good value for money	84%	85%	80%	87%	79%

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

Base: hunters who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=365 to 373). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.



FUTURE DEMAND & EXPERIENCES

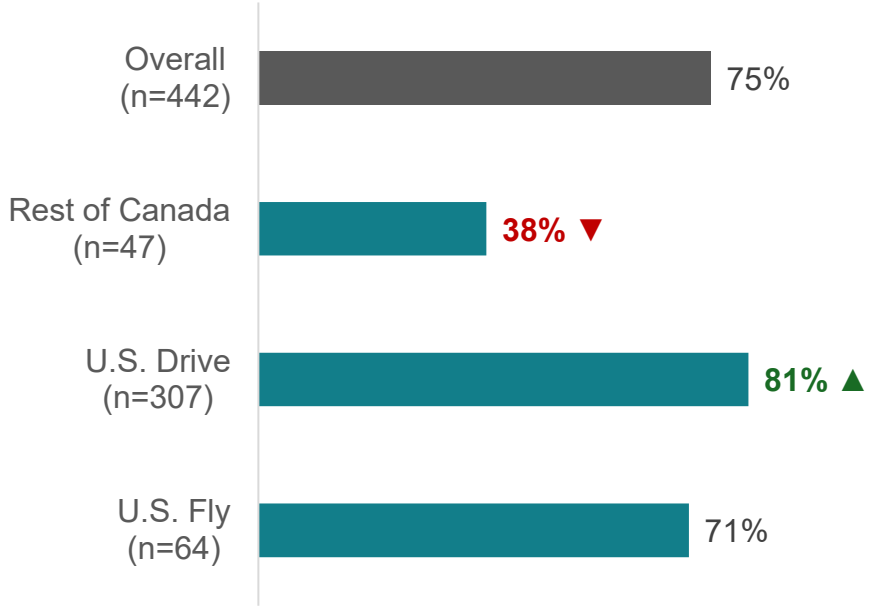
LIKELIHOOD TO VISIT NORTHERN ONTARIO IN THE NEXT 2 YEARS

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

Three-quarters of hunters (75%) are likely to visit Northern Ontario for a hunting trip in the next two years, including 49% who are very likely.

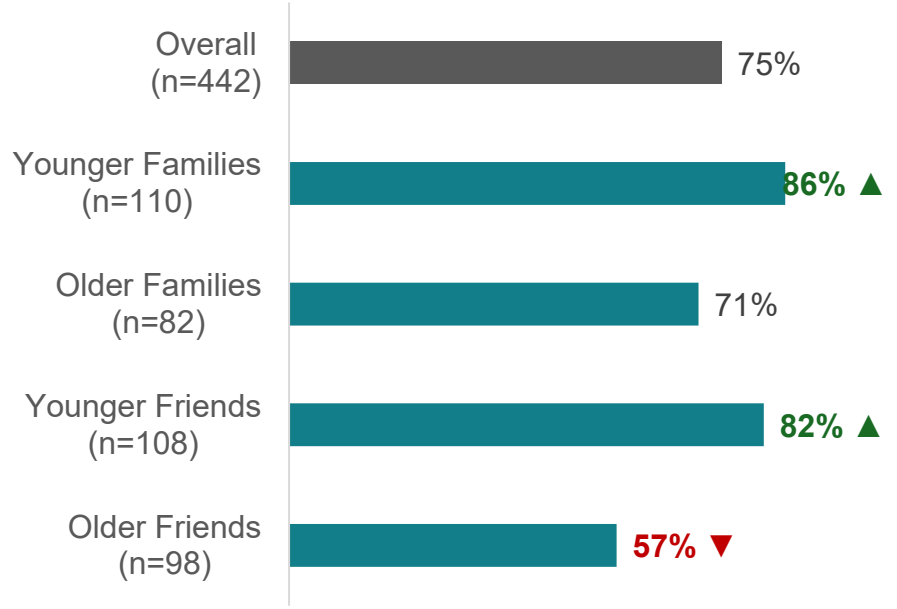
U.S. Drive hunters are more likely than other markets to visit (81%), and Rest of Canada hunters less likely (38%). Younger families (86%) and younger friend groups (82%) are more likely than other traveller types to visit, and older friend groups less likely (57%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all hunters, excluding “Don’t know” (n=442). N4 (TOP2) How likely are you to visit Northern Ontario for a hunting trip in the next 2 years?
TOP2 = % somewhat or very likely.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – MARKET

All hunters | Includes past visitors to Northern Ontario

Eight in ten hunters would make Northern Ontario the only destination (32%) or the primary destination with brief stops elsewhere (49%) of a hunting trip, while 14% see it as one of several equal destinations.

None of the market differences are significant.

Role of Northern Ontario	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
It would be the only destination of the trip	32%	42%	31%	29%
It would be the primary destination, with brief stops elsewhere	49%	41%	52%	48%
It would be one of several equal destinations	14%	14%	14%	17%
It would be a secondary stop on a trip focused elsewhere	2%	1%	1%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). N5 If you were to visit Northern Ontario for hunting, which of the following best describes the role it would play in your trip?

"Not sure" (2%) not shown.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – TRAVELLER TYPE

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

Older families are the most likely to see Northern Ontario as one of several equal destinations (23%).

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
It would be the only destination of the trip	32%	32%	31%	31%	31%
It would be the primary destination, with brief stops elsewhere	49%	52%	43%	53%	49%
It would be one of several equal destinations	14%	13%	23%	15%	12%
It would be a secondary stop on a trip focused elsewhere	2%	3%	0%	1%	4%

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

Base: all hunters (n=445). N5 If you were to visit Northern Ontario for hunting, which of the following best describes the role it would play in your trip?

"Not sure" (2%) not shown.

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

All hunters | Includes past visitors to Northern Ontario

Safety and reliability, access to nature and wilderness, and the abundance of wildlife and game (94% each) are the most important factors in deciding to visit Northern Ontario for hunting, followed by the quality of wildlife and game (93%) and clear, manageable licensing requirements (92%).

None of the market differences are significant.

Factor	Overall (n=443)	Rest of Canada (n=48)	U.S. Drive (n=308)	U.S. Fly (n=64)
Safety and reliability of the destination	94%	87%	95%	97%
Access to nature and wilderness	94%	94%	95%	98%
Abundance of wildlife and game (e.g., population density, likelihood of a successful harvest)	94%	92%	94%	95%
Quality of wildlife and game available (e.g., trophy potential, species diversity)	93%	84%	94%	93%
Licensing requirements that are clear and manageable	92%	93%	92%	90%
Ability to get away from it all	91%	89%	91%	91%
Cost and overall affordability	91%	93%	92%	87%
Travel time and ease of access	89%	85%	89%	89%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters, excluding “Don’t know”; bases vary by item (n=437 to 443). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for hunting? (flattened) TOP2 = % somewhat or very important.

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

All hunters | Includes past visitors to Northern Ontario

Quality of accommodation (88%) and a strong reputation (87%) also matter to most hunters, while fewer consider hunting events or competitions important (55%).

Rest of Canada hunters place less importance than other markets on connectivity (54%), activities for non-hunting companions (40%), Indigenous cultural experiences (27%) and hunting events (31%), while U.S. Drive hunters place more importance on connectivity (81%) and Indigenous experiences (73%).

Factor	Overall (n=443)	Rest of Canada (n=48)	U.S. Drive (n=308)	U.S. Fly (n=64)
Quality of accommodation options	88%	77%	90%	90%
Strong reputation or positive word of mouth	87%	89%	88%	84%
Cell phone or internet connectivity at the destination	77%	54% ▼	81% ▲	76%
Availability of outfitters, guides, or operators	76%	60%	79%	81%
Availability of activities for non-hunting travel companions	71%	40% ▼	74%	73%
Indigenous cultural experiences	67%	27% ▼	73% ▲	69%
Hunting events or competitions	55%	31% ▼	57%	66%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters, excluding “Don’t know”; bases vary by item (n=437 to 443). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for hunting? (flattened) TOP2 = % somewhat or very important.

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

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

Older families place the most importance on the abundance of wildlife and game (99%), although traveller type differences are not significant.

None of the traveller type differences are significant.

Factor	Overall (n=443)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=98)
Safety and reliability of the destination	94%	92%	94%	97%	96%
Access to nature and wilderness	94%	92%	96%	94%	97%
Abundance of wildlife and game (e.g., population density, likelihood of a successful harvest)	94%	89%	99%	95%	96%
Quality of wildlife and game available (e.g., trophy potential, species diversity)	93%	88%	96%	95%	94%
Licensing requirements that are clear and manageable	92%	90%	88%	93%	96%
Ability to get away from it all	91%	87%	97%	93%	92%
Cost and overall affordability	91%	85%	96%	92%	92%
Travel time and ease of access	89%	86%	88%	86%	95%

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

Base: all hunters, excluding “Don’t know”; bases vary by item (n=437 to 443). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for hunting? (flattened) TOP2 = % somewhat or very important.

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

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

Younger families place more importance than other traveller types on hunting events or competitions (67%), and older friend groups less (38%).

Factor	Overall (n=443)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=98)
Quality of accommodation options	88%	85%	88%	87%	90%
Strong reputation or positive word of mouth	87%	88%	89%	90%	84%
Cell phone or internet connectivity at the destination	77%	81%	72%	71%	80%
Availability of outfitters, guides, or operators	76%	81%	72%	75%	74%
Availability of activities for non-hunting travel companions	71%	79%	64%	74%	65%
Indigenous cultural experiences	67%	73%	67%	70%	58%
Hunting events or competitions	55%	67% ▲	49%	63%	38% ▼

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

Base: all hunters, excluding “Don’t know”; bases vary by item (n=437 to 443). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for hunting? (flattened) TOP2 = % somewhat or very important.

PREFERRED ACCESS TYPES – MARKET

All hunters

Most hunters prefer road-accessible areas (83%), while four in ten would consider fly-in or float plane access (42%) or remote boat-in access (41%), and a quarter train-in access (25%).

None of the market differences are significant.

Access type	Overall (n=431)	Rest of Canada (n=46)	U.S. Drive (n=297)	U.S. Fly (n=64)
Road-accessible areas	83%	81%	86%	74%
Fly-in or float plane access	42%	35%	44%	41%
Remote boat-in access	41%	28%	41%	41%
Train-in access	25%	14%	26%	29%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=431). N7 For a hunting trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

“Not sure” (3%) not shown.

PREFERRED ACCESS TYPES – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Road-accessible areas are the most preferred access type for every traveller type.

None of the traveller type differences are significant.

Access type	Overall (n=431)	Younger Families (n=107)	Older Families (n=80)	Younger Friends (n=105)	Older Friends (n=96)
Road-accessible areas	83%	82%	82%	86%	82%
Fly-in or float plane access	42%	46%	45%	39%	40%
Remote boat-in access	41%	41%	46%	40%	40%
Train-in access	25%	29%	19%	25%	27%

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

Base: all hunters (n=431). N7 For a hunting trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (3%) not shown.

PREFERRED LODGING OPTIONS – MARKET

All hunters

Backcountry or wilderness camping is the most preferred lodging option for hunting trips (48%), followed by private cottages (43%), commercial cottages or cabin rentals (41%) and drive-in lodges or resorts (40%).

Interest in backcountry camping ranges from 27% among Rest of Canada hunters to 55% among U.S. Fly hunters, although market differences are not significant.

Lodging option	Overall (n=442)	Rest of Canada (n=48)	U.S. Drive (n=306)	U.S. Fly (n=64)
Backcountry or wilderness camping	48%	27%	52%	55%
Private cottage (owned or borrowed)	43%	44%	43%	42%
Commercial cottage or cabin rental	41%	39%	41%	44%
Drive-in lodge or resort	40%	44%	40%	32%
Designated campground (private or provincial park)	37%	23%	38%	43%
Hotel or motel	35%	29%	36%	40%
AirBnB	31%	21%	33%	30%
Fly-in or remote outpost camp	25%	29%	25%	23%
Home of friends or relatives (unpaid)	20%	25%	17%	19%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=442). N8 Which of the following lodging options would you prefer on a hunting trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

PREFERRED LODGING OPTIONS – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Older friend groups are less likely than other traveller types to prefer AirBnB (13%).

Younger families are the most likely to prefer staying with friends or relatives (29%).

Lodging option	Overall (n=442)	Younger Families (n=110)	Older Families (n=81)	Younger Friends (n=107)	Older Friends (n=100)
Backcountry or wilderness camping	48%	44%	44%	51%	51%
Private cottage (owned or borrowed)	43%	49%	50%	40%	33%
Commercial cottage or cabin rental	41%	35%	41%	42%	46%
Drive-in lodge or resort	40%	38%	39%	41%	38%
Designated campground (private or provincial park)	37%	39%	38%	30%	37%
Hotel or motel	35%	35%	35%	35%	29%
AirBnB	31%	38%	36%	30%	13% ▼
Fly-in or remote outpost camp	25%	19%	29%	18%	33%
Home of friends or relatives (unpaid)	20%	29%	19%	16%	21%

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

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

Base: all hunters (n=442). N8 Which of the following lodging options would you prefer on a hunting trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

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

Hunters who have visited Northern Ontario in the past 5 years

Better value for money is the leading factor that would encourage past-five-year visitors to spend more nights in Northern Ontario (45%), followed by improved access infrastructure (37%), quality paid accommodation (35%) and more packaged or all-inclusive experiences (33%).

U.S. Fly hunters are the most likely to want quality paid accommodation (48%) and more packaged experiences (45%), although market differences are not significant.

Factor	Overall (n=255)	Rest of Canada* (n=18)	U.S. Drive (n=184)	U.S. Fly (n=31)
Better value for money overall	45%	43%	45%	55%
Improved road, trail, or water access infrastructure	37%	14%	38%	45%
Better availability of quality paid accommodation (lodges, hotels, cottages)	35%	23%	34%	48%
More packaged or all-inclusive experiences	33%	29%	31%	45%
Better cell or internet connectivity	31%	16%	32%	31%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.
"Not sure" (0%) not shown.
*Small base (n<30); interpret with caution.

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

Hunters who have visited Northern Ontario in the past 5 years

A quarter would stay longer for more things for their travel companions to do (28%) or Indigenous cultural experiences (25%), and 13% are already satisfied with the length of their stays.

Rest of Canada hunters are the most likely to be satisfied with their current stays (32%), although their base is small and market differences are not significant.

Factor	Overall (n=255)	Rest of Canada* (n=18)	U.S. Drive (n=184)	U.S. Fly (n=31)
More things to do beyond hunting for my travel companions	28%	19%	27%	41%
Indigenous cultural experiences	25%	22%	26%	24%
Events or competitions timed to my travel	20%	16%	19%	16%
A guided multi-stop itinerary combining activities or sub-regions	18%	0%	18%	35%
Nothing – I am already satisfied with the length of my stays	13%	32%	12%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. "Not sure" (0%) not shown.
*Small base (n<30); interpret with caution.

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

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

Younger families are the most likely to want more packaged experiences (43%) and better connectivity (41%), although traveller type differences are not significant.

None of the traveller type differences are significant.

Factor	Overall (n=255)	Younger Families (n=80)	Older Families (n=44)	Younger Friends (n=68)	Older Friends (n=42)
Better value for money overall	45%	44%	56%	45%	44%
Improved road, trail, or water access infrastructure	37%	44%	27%	40%	30%
Better availability of quality paid accommodation (lodges, hotels, cottages)	35%	39%	42%	35%	25%
More packaged or all-inclusive experiences	33%	43%	22%	33%	21%
Better cell or internet connectivity	31%	41%	22%	33%	20%

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

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. “Not sure” (0%) not shown.

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

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

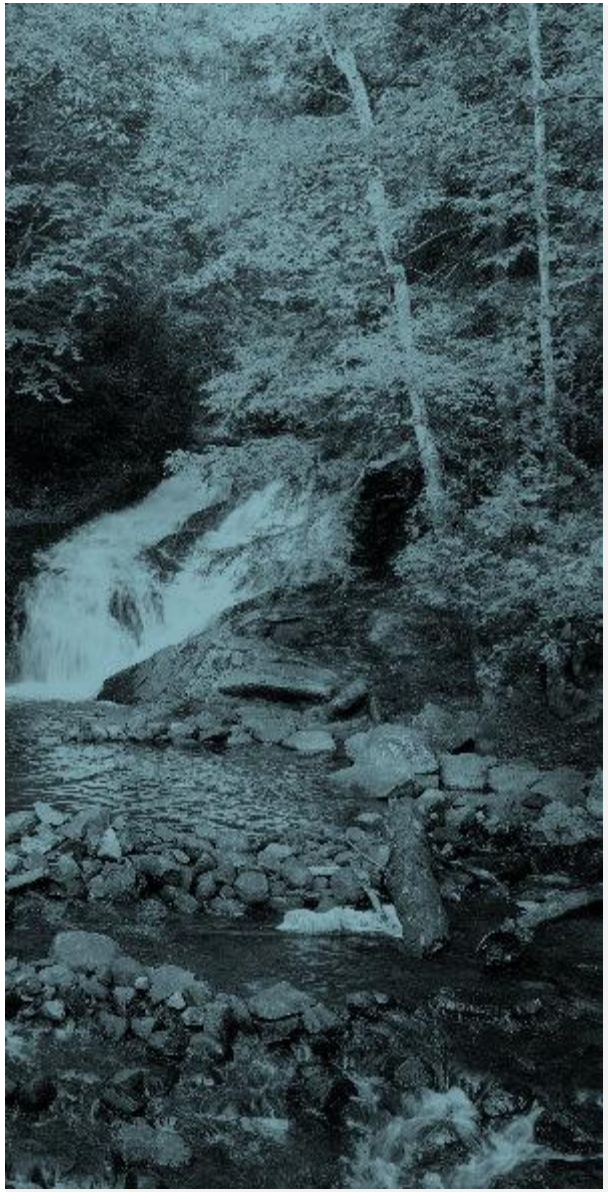
Older friend groups are the most likely to want events timed to their travel (30%), although traveller type differences are not significant.

None of the traveller type differences are significant.

Factor	Overall (n=255)	Younger Families (n=80)	Older Families (n=44)	Younger Friends (n=68)	Older Friends (n=42)
More things to do beyond hunting for my travel companions	28%	35%	29%	30%	18%
Indigenous cultural experiences	25%	31%	32%	22%	15%
Events or competitions timed to my travel	20%	23%	10%	14%	30%
A guided multi-stop itinerary combining activities or sub-regions	18%	28%	15%	18%	9%
Nothing – I am already satisfied with the length of my stays	13%	4%	20%	11%	22%

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

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply. “Not sure” (0%) not shown.



BARRIERS & COMPETITION

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

All hunters | Includes past visitors to Northern Ontario

Cost is the most commonly cited barrier to visiting Northern Ontario for hunting (33%), followed by poor value for money (27%), high transportation costs (26%) and expensive licensing requirements (26%).

Rest of Canada hunters are more likely than other markets to cite cost (56%).

Barrier	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Cost	33%	56% ▲	31%	27%
Poor value for money	27%	41%	24%	28%
High transportation costs (gas, airfare)	26%	40%	25%	20%
Expensive licensing requirements	26%	39%	24%	26%
Unfavourable weather or season timing	24%	26%	24%	19%
Wildfires, flooding, or other environmental disruptions	24%	25%	25%	23%
Complicated licensing requirements	24%	35%	21%	28%
Concerns about safety	23%	20%	24%	23%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for hunting? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

All hunters | Includes past visitors to Northern Ontario

Each barrier on this slide is cited by a fifth of hunters or fewer. Anti-American sentiment is cited by 21% of U.S. Drive and 33% of U.S. Fly hunters.

Rest of Canada hunters are more likely than other markets to say Northern Ontario is too far to drive (38%).

Barrier	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Poor road or water access	20%	32%	18%	21%
Unfamiliar or unclear regulations	20%	22%	20%	20%
Anti-American sentiment	19%	–	21%	33%
Too far to drive	18%	38% ▲	15%	15%
Limited accommodation options	16%	19%	16%	13%
Lack of amenities or services at the destination	16%	15%	14%	25%
Insects (e.g., blackflies, mosquitoes)	15%	14%	15%	15%
Availability of campsites	15%	10%	14%	14%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for hunting? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

All hunters | Includes past visitors to Northern Ontario

Each remaining barrier is cited by 15% of hunters or fewer, including 8% who say they do not know enough about Northern Ontario's hunting opportunities.

None of the market differences are significant.

Barrier	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Concerns about crossing the Canada-US border	15%	–	16%	23%
Poor or unreliable cell phone or internet connectivity	14%	11%	17%	2%
Difficulty finding reliable trip planning information	13%	19%	11%	16%
Passport or documentation requirements	12%	–	15%	17%
Too remote or rugged for my comfort level	11%	5%	11%	10%
Not sure the hunting quality would meet my expectations	9%	13%	9%	6%
I do not know enough about Northern Ontario's hunting opportunities	8%	17%	6%	11%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for hunting? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

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

Older friend groups are more likely than other traveller types to cite cost (51%), and they are the most likely to cite poor value, transportation costs and expensive licensing (37% to 38%).

Apart from cost, none of the traveller type differences are significant.

Barrier	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Cost	33%	29%	24%	34%	51% ▲
Poor value for money	27%	23%	28%	22%	37%
High transportation costs (gas, airfare)	26%	19%	29%	22%	38%
Expensive licensing requirements	26%	20%	28%	23%	37%
Unfavourable weather or season timing	24%	19%	22%	21%	35%
Wildfires, flooding, or other environmental disruptions	24%	19%	26%	23%	29%
Complicated licensing requirements	24%	18%	27%	19%	35%
Concerns about safety	23%	23%	23%	25%	22%

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

Base: all hunters (n=445). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for hunting? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

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

Each barrier on this slide is cited by a quarter or fewer in every traveller type.

None of the traveller type differences are significant.

Barrier	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Poor road or water access	20%	16%	22%	20%	25%
Unfamiliar or unclear regulations	20%	17%	17%	22%	21%
Anti-American sentiment	19%	18%	24%	14%	18%
Too far to drive	18%	16%	10%	20%	20%
Limited accommodation options	16%	13%	21%	12%	17%
Lack of amenities or services at the destination	16%	16%	22%	13%	15%
Insects (e.g., blackflies, mosquitoes)	15%	9%	22%	14%	18%
Availability of campsites	15%	15%	15%	12%	15%

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

Base: all hunters (n=445). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for hunting? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

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

Each barrier on this slide is cited by 17% or fewer in every traveller type.

None of the traveller type differences are significant.

Barrier	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Concerns about crossing the Canada-US border	15%	16%	15%	17%	14%
Poor or unreliable cell phone or internet connectivity	14%	17%	14%	11%	15%
Difficulty finding reliable trip planning information	13%	11%	10%	16%	14%
Passport or documentation requirements	12%	10%	11%	15%	15%
Too remote or rugged for my comfort level	11%	16%	4%	8%	13%
Not sure the hunting quality would meet my expectations	9%	11%	9%	8%	7%
I do not know enough about Northern Ontario's hunting opportunities	8%	6%	9%	5%	12%

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

Base: all hunters (n=445). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for hunting? Please select all that apply.

"Not sure" (6%) not shown.

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

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

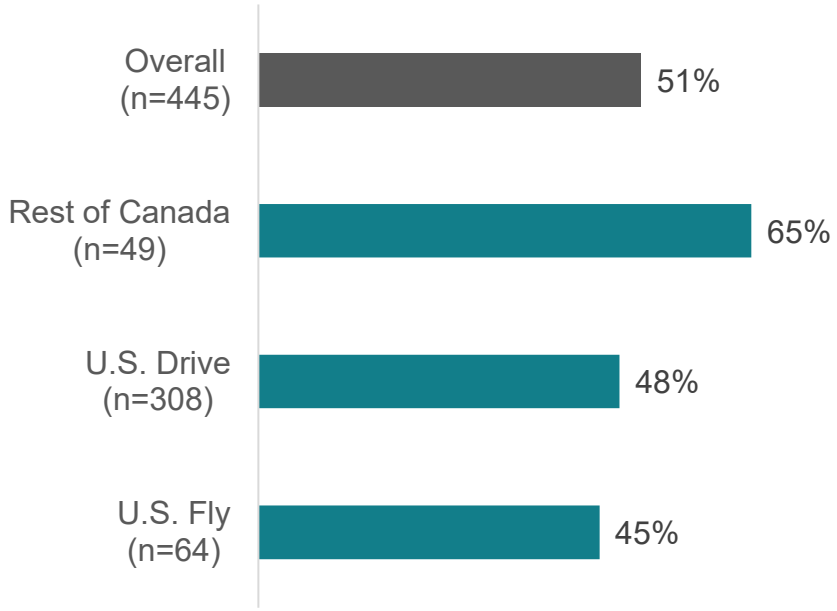
IMPACT OF FINANCIAL PRESSURES ON TRAVEL PLANS

All hunters | Traveller types are defined on slide 10

Half of hunters (51%) agree that financial pressures have impacted their travel plans in the next 12 months, including 21% who strongly agree.

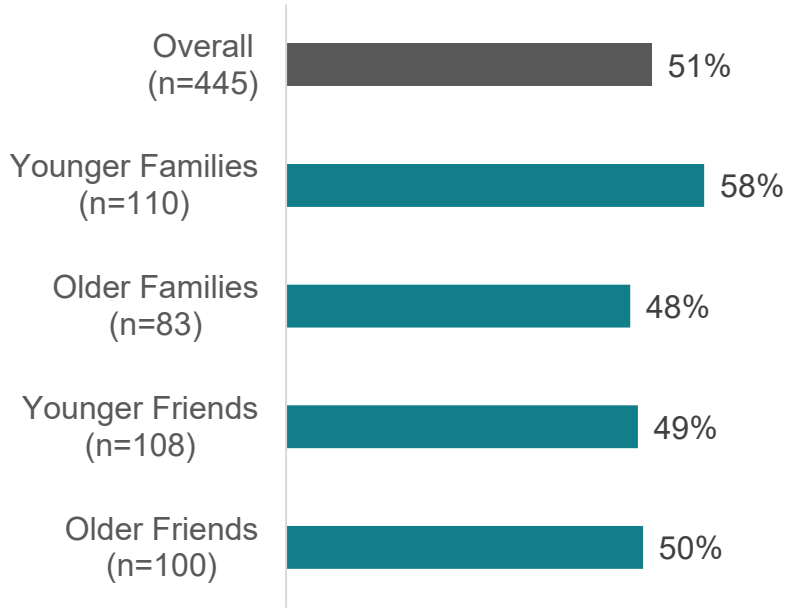
Agreement ranges from 45% among U.S. Fly hunters to 65% among Rest of Canada hunters, and from 48% among older families to 58% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all hunters, excluding “Don’t know” (n=445). BD1A (TOP2) How much do you agree or disagree with the following statement? “Financial pressures have impacted my travel plans in the next 12 months” TOP2 = % somewhat or strongly agree.

OTHER DESTINATIONS CONSIDERED – MARKET (1 OF 2)

All hunters

Michigan (43%), Wisconsin (40%) and Minnesota (36%) are the destinations hunters most often consider instead of Northern Ontario, followed by Pennsylvania, British Columbia and Illinois (24% to 25%).

U.S. Drive hunters are more likely than other markets to consider Michigan (52%), Wisconsin (46%), Pennsylvania (30%) and Illinois (28%), while Rest of Canada hunters are more likely to consider British Columbia (51%) and Quebec (40%).

Destination	Overall (n=434)	Rest of Canada (n=46)	U.S. Drive (n=306)	U.S. Fly (n=61)
Michigan	43%	3% ▼	52% ▲	40%
Wisconsin	40%	5% ▼	46% ▲	44%
Minnesota	36%	5% ▼	40%	45%
Pennsylvania	25%	2% ▼	30% ▲	21%
British Columbia	24%	51% ▲	18% ▼	26%
Illinois	24%	3% ▼	28% ▲	23%
Somewhere else in Ontario	23%	20%	23%	12%
Quebec	22%	40% ▲	18% ▼	22%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=434). BD2 What other destinations do you consider for hunting trips? Please select all that apply. “Not sure” (2%) not shown.

OTHER DESTINATIONS CONSIDERED – MARKET (2 OF 2)

All hunters

About a fifth of hunters consider New York (22%) or Manitoba (20%), and 18% Saskatchewan.

Rest of Canada hunters are more likely than other markets to consider Manitoba (41%).

Destination	Overall (n=434)	Rest of Canada (n=46)	U.S. Drive (n=306)	U.S. Fly (n=61)
New York	22%	6%	23%	27%
Manitoba	20%	41% ▲	18%	9%
Saskatchewan	18%	32%	16%	16%
Colorado	1%	0%	<1%	4% ▲
Alberta	<1%	3% ▲	0%	0%
Ohio	<1%	0%	<1%	0%
Other	5%	8%	5%	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=434). BD2 What other destinations do you consider for hunting trips? Please select all that apply. "Not sure" (2%) not shown.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (1 OF 2)

All hunters | Traveller types are defined on slide 10

Younger friend groups are more likely than other traveller types to consider Illinois (34%).

Michigan or Wisconsin is among the most considered destinations for every traveller type.

Destination	Overall (n=434)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=106)	Older Friends (n=94)
Michigan	43%	41%	45%	45%	42%
Wisconsin	40%	37%	43%	45%	39%
Minnesota	36%	40%	35%	38%	30%
Pennsylvania	25%	25%	29%	30%	21%
British Columbia	24%	23%	26%	28%	22%
Illinois	24%	29%	13%	34% ▲	15%
Somewhere else in Ontario	23%	22%	20%	28%	20%
Quebec	22%	25%	28%	16%	26%

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

Base: all hunters (n=434). BD2 What other destinations do you consider for hunting trips? Please select all that apply. "Not sure" (2%) not shown.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (2 OF 2)

All hunters | Traveller types are defined on slide 10

Each destination on this slide is considered by about a quarter or fewer in every traveller type.

None of the traveller type differences are significant.

Destination	Overall (n=434)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=106)	Older Friends (n=94)
New York	22%	28%	20%	22%	15%
Manitoba	20%	19%	18%	22%	24%
Saskatchewan	18%	22%	21%	20%	13%
Colorado	1%	0%	1%	0%	1%
Alberta	<1%	0%	2%	0%	0%
Ohio	<1%	0%	1%	0%	0%
Other	5%	1% ▼	5%	5%	10%

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

Base: all hunters (n=434). BD2 What other destinations do you consider for hunting trips? Please select all that apply. "Not sure" (2%) not shown.

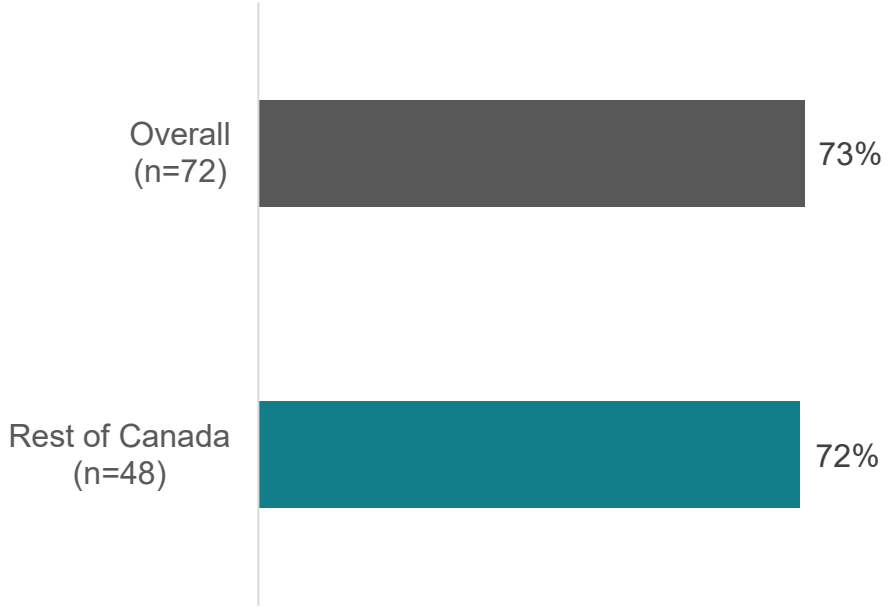
POLITICAL CLIMATE AND CHOOSING NORTHERN ONTARIO

Canadian hunters | Traveller types are defined on slide 10

Seven in ten Canadian hunters (73%) are more likely to choose Northern Ontario over the United States because of the current political climate in the U.S., including 54% who strongly agree.

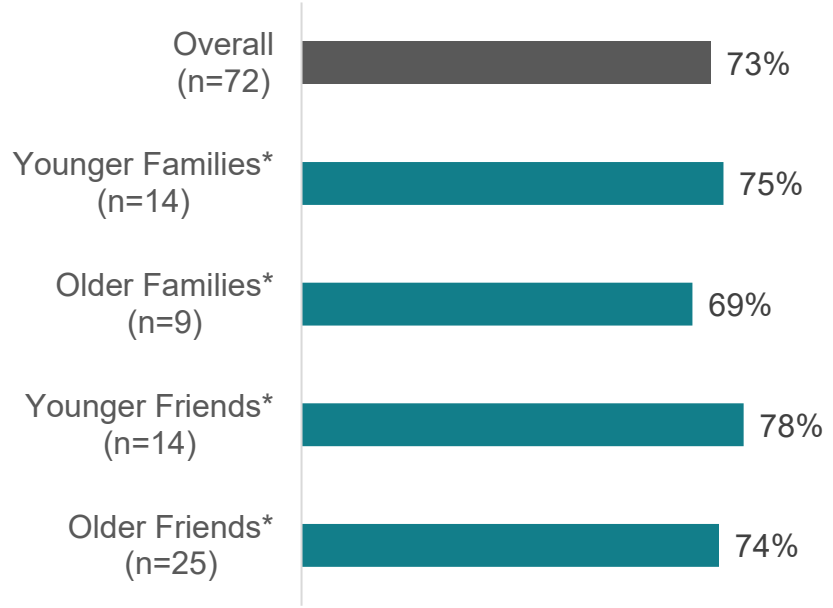
Agreement is 72% among Rest of Canada hunters. Traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian hunters, excluding “Don’t know” (n=72). BD3A (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of the current political climate in the U.S.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

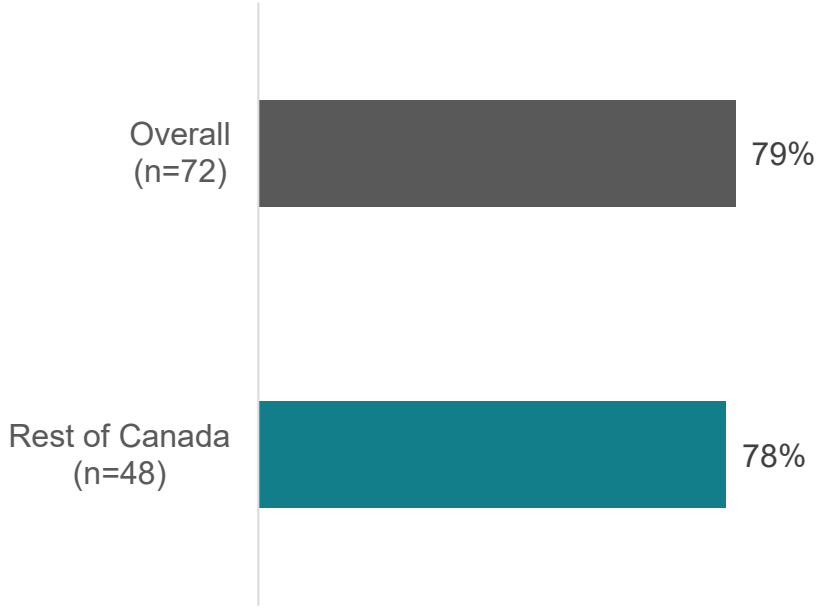
EXCHANGE RATES AND CHOOSING NORTHERN ONTARIO

Canadian hunters | Traveller types are defined on slide 10

Eight in ten Canadian hunters (79%) are more likely to choose Northern Ontario over the United States because of unfavourable exchange rates, including 52% who strongly agree.

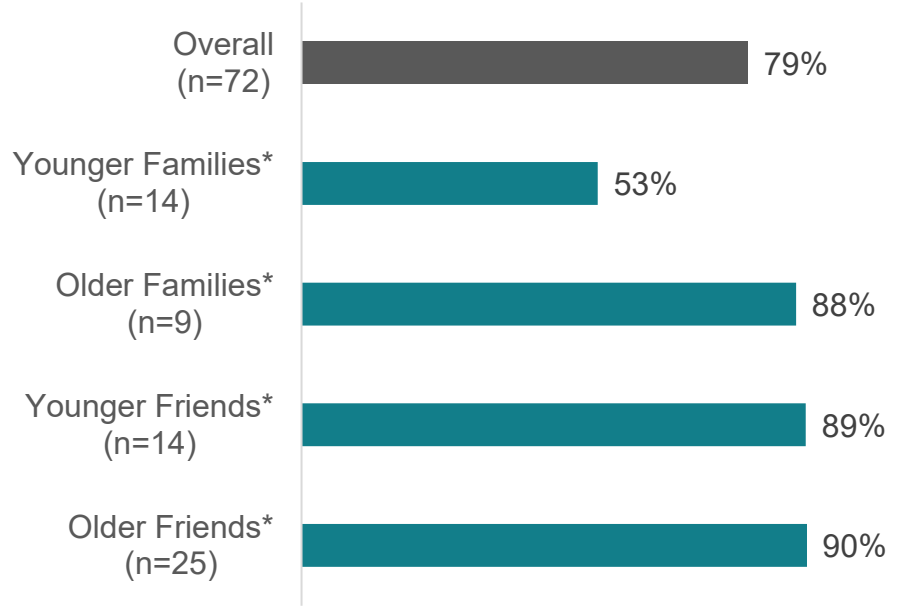
Agreement is 78% among Rest of Canada hunters. Traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian hunters, excluding “Don’t know” (n=72). BD3B (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of unfavourable exchange rates.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

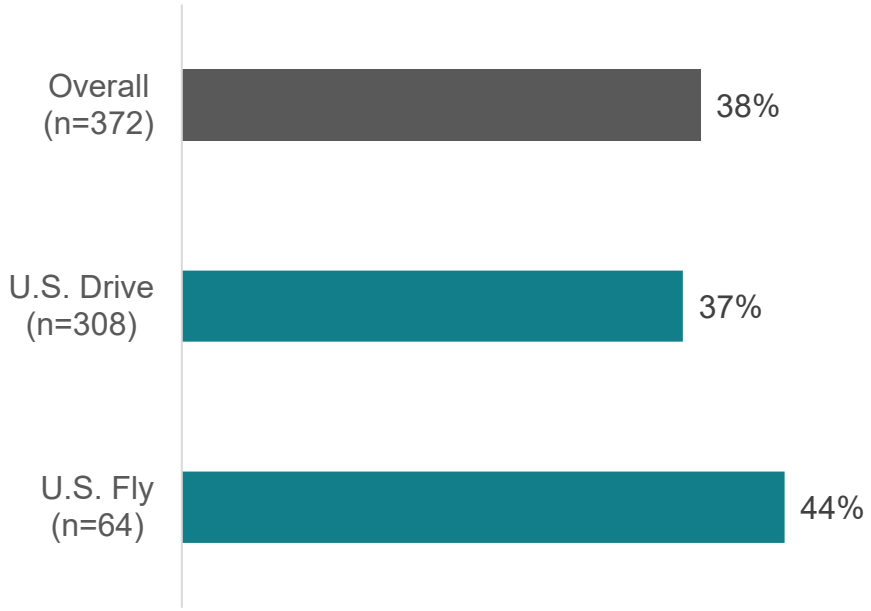
CONCERN ABOUT CROSSING THE BORDER INTO CANADA

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

Four in ten U.S. hunters (38%) are concerned about crossing the border to enter Canada, while half (51%) are not concerned.

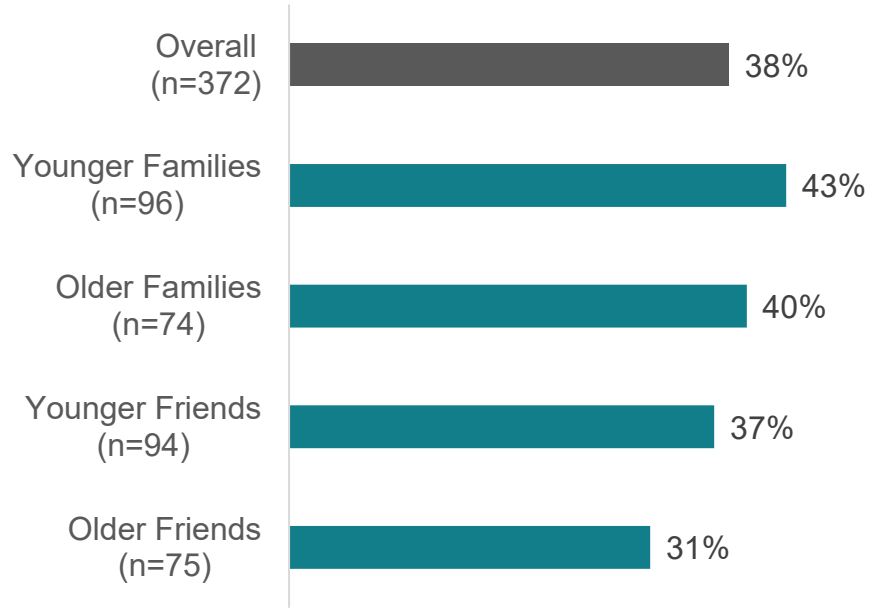
Concern is 37% among U.S. Drive hunters and 44% among U.S. Fly hunters, and ranges from 31% among older friend groups to 43% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. hunters, excluding "Don't know" (n=372). BD4A (TOP2) [I am concerned about crossing the border to enter Canada.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

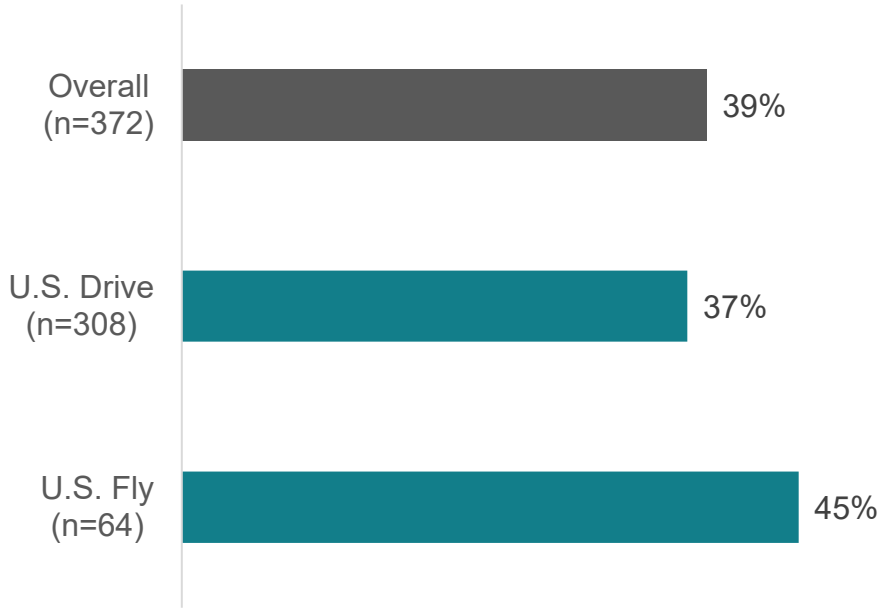
CONCERN ABOUT RETURNING TO THE U.S.

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

Four in ten U.S. hunters (39%) are concerned about crossing the border when returning to the U.S. from Canada, while half (52%) are not concerned.

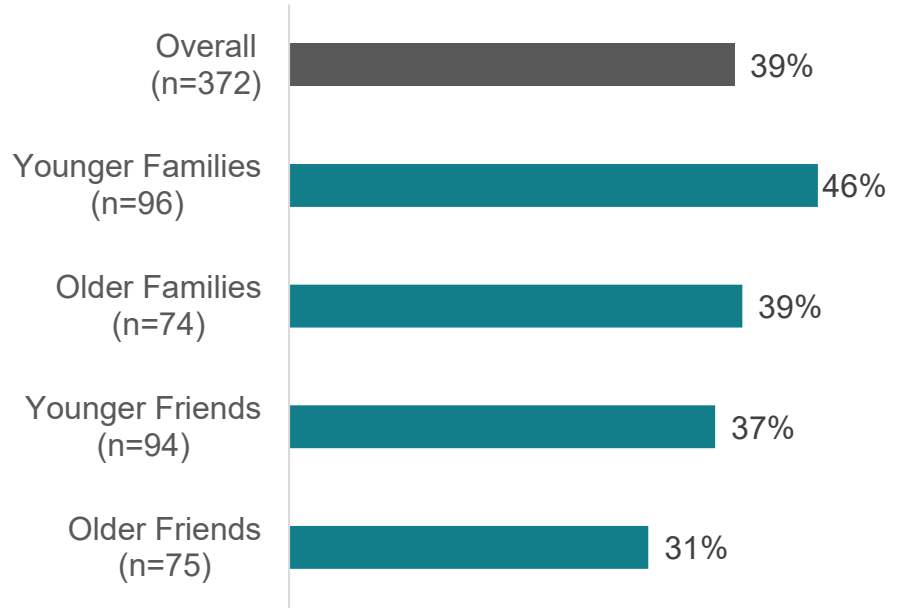
Concern is 37% among U.S. Drive hunters and 45% among U.S. Fly hunters, and ranges from 31% among older friend groups to 46% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. hunters, excluding "Don't know" (n=372). BD4B (TOP2) [I am concerned about crossing the border returning to the US from Canada.]
How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.