CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE I
Avid Hunters: Past Visitors Report

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

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CONTEXT IS EVERYTHING

CONTENTS

KEY OBJECTIVES	3
METHODOLOGY	4-11
EXECUTIVE SUMMARY	12-15
PAST EXPERIENCE	16-34
PAST VISITORS VS. OVERALL	35-95



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
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 (this 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 All Hunters 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 – PAST VISITORS: WHO THEY ARE & WHAT THEY DID

PAST NORTHERN ONTARIO VISITORS - AVID HUNTERS

More than half of hunters have hunted in Northern Ontario in the past five years, and they are younger, family hunters. Past visitors are mostly U.S. Drive hunters (73%), followed by U.S. Fly (12%), Ontario (9%) and Rest of Canada (7%) hunters. Three-quarters (78%) have children at home, 46% are aged 35 to 44, 62% know a lot about Northern Ontario and half (53%) mix guided and self-guided hunting. They take 5.0 hunting trips a year. (See slides 17–18, 52)

Their trips are high-value, outfitted hunts in paid lodging. Visitors have made an average of 3.2 hunting trips to Northern Ontario in five years, most recently in the fall (42%). Their most recent trip lasted 4.1 nights with average party spending of $4,307, rising to $6,433 among U.S. Fly parties, and 73% stayed in paid roofed lodging, most often hotels or motels (33%). Half used a local outfitter or guide (53%), rented gear (51%) or bought a packaged experience (51%), and for half (53%) Northern Ontario was the primary and only destination. (See slides 17–18, 23, 25–26, 28–30, 32)

They rate the experience highly and would stay longer for better value and access. Eight in ten (80%) rated their trip better than hunting elsewhere, including 48% much better, and half (49%) are taking more Northern Ontario trips than 10 years ago. Better value for money (45%), improved access infrastructure (37%), quality paid accommodation (35%) and more packaged experiences (33%) would extend their stays. (See slide 34, and slides 114–115 of the All Hunters report)



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

PAST NORTHERN ONTARIO VISITORS - AVID HUNTERS

Past visitors are younger family hunters, newer to the sport. They take more hunting trips a year than hunters overall (5.0 vs. 4.5), are more likely to have children at home (78% vs. 64%) and to be aged 35 to 44 (46% vs. 38%), and fewer have been hunting for more than 10 years (43% vs. 56%). They are more likely to target small game (66% vs. 59%), waterfowl (55% vs. 48%) and moose (32% vs. 25%), and less likely to target white-tailed deer (75% vs. 81%). (See slides 68–69)

Past visitors know the region better and see fewer barriers. Six in ten past visitors (62%) know a lot about Northern Ontario, against 42% of hunters overall. They are less likely to cite expensive licensing requirements (15% vs. 26%), complicated licensing requirements (17% vs. 24%), high transportation costs (19% vs. 26%) and cost (27% vs. 33%). (See slides 40–45, and slide 94 of the All Hunters report)

Past visitors hunt with more support and plan differently. Past visitors are more likely than hunters overall to mix guided and self-guided hunting (53% vs. 41%), to value working with local operators (84% vs. 72%), and to fly to a regional hub (35% vs. 26%) or use a float plane or charter (18% vs. 11%). They rely less on word of mouth (44% vs. 55%) and are more likely to use AI to plan (78% vs. 65%). Almost all past visitors (96%) are likely to visit again, against 75% overall, and their Net Promoter Score is 57, against 34. (See slides 36, 38, 52, 54, 66, 72)



EXECUTIVE SUMMARY – SUB-REGIONAL PATTERNS

PAST NORTHERN ONTARIO VISITORS - AVID HUNTERS

Hunters spread evenly across the five regions. Between 22% and 26% of hunters have visited each region, led by Northeast Ontario (26%), and younger families are the most likely to have visited every region (31% to 37%). Visitors to each region rate their trips similarly, with Net Promoter Scores of 51 to 62 and 77% to 85% rating their trip better than elsewhere. (See slides 21–22)

Sunset and Superior Country: high-spend, outfitted hunts. Visitors to Sunset Country ($5,092) and Superior Country ($5,265) spent more per party than past visitors overall ($4,307). Superior Country visitors are more likely to mix guided and self-guided hunting (69% vs. 53%), and Sunset Country visitors to rent gear (62% vs. 51%) and buy packaged experiences (62% vs. 51%). The practical priority is guided, packaged and outfitter-led products in these regions.

Algoma Country: fly-in and packaged demand. Algoma Country visitors are more likely to rent gear (65%) and use a charter or float plane (31% vs. 21%), are the most likely to have stayed in paid lodging (81%), and are the most likely to say more packaged experiences (45%) and quality paid accommodation (43%) would extend their stays. The practical priority is fly-in packages paired with quality lodging.

Northeast Ontario and The Great Canadian Wilderness: closer, lower-spend trips. Visitors to Northeast Ontario ($3,947) and The Great Canadian Wilderness ($4,062) spent less per party than visitors to the northwestern regions. Great Canadian Wilderness visitors are the most likely to have stayed in paid roofed lodging (83%) and to want improved access infrastructure (45%). The practical priority is access improvements and roofed lodging that turn shorter trips into longer stays.



PAST EXPERIENCE

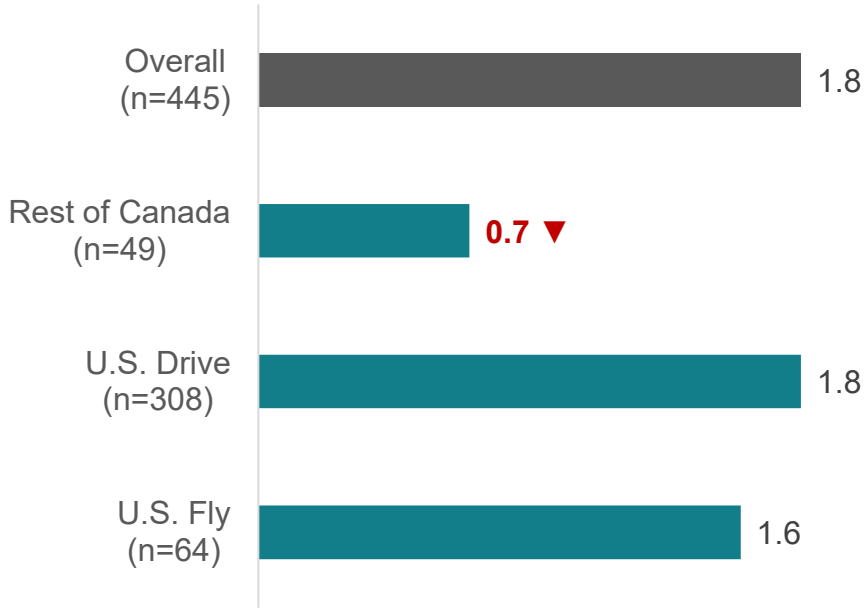
NORTHERN ONTARIO HUNTING TRIPS IN THE PAST 5 YEARS

All hunters | Traveller types are defined on slide 10

Hunters have taken an average of 1.8 hunting trips to Northern Ontario in the past five years.

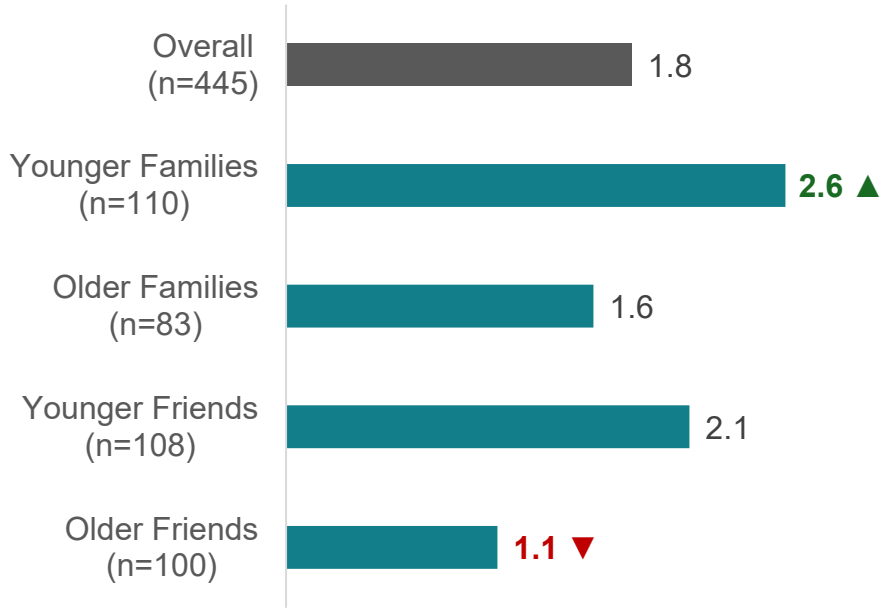
Younger families have taken more trips than other traveller types (2.6), and older friend groups fewer (1.1). Rest of Canada hunters have taken fewer trips than other markets (0.7).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all hunters (n=445). P1 (AVG) In the past 5 years, how many times have you visited Northern Ontario for a hunting trip? AVG = average number of trips among all hunters, including those who have not visited.

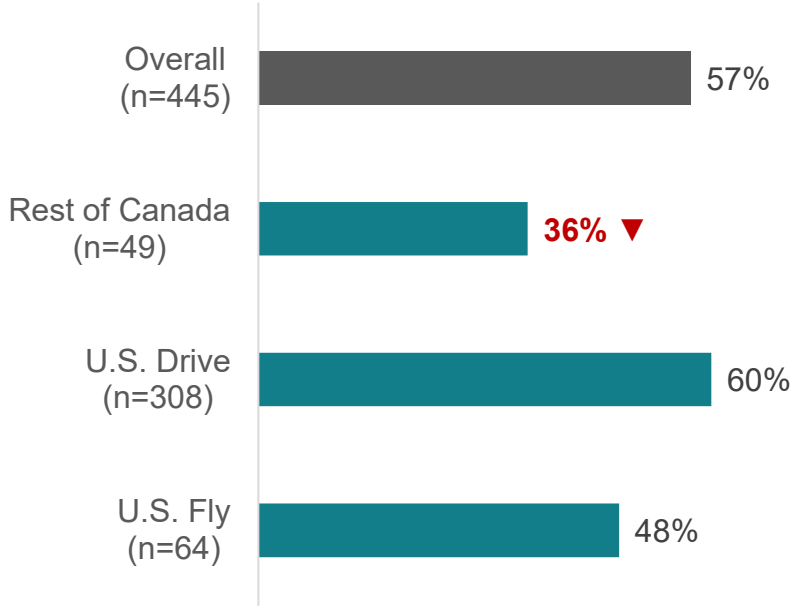
VISITED NORTHERN ONTARIO FOR HUNTING IN THE PAST 5 YEARS

All hunters | Traveller types are defined on slide 10

More than half of hunters (57%) have visited Northern Ontario for a hunting trip in the past five years.

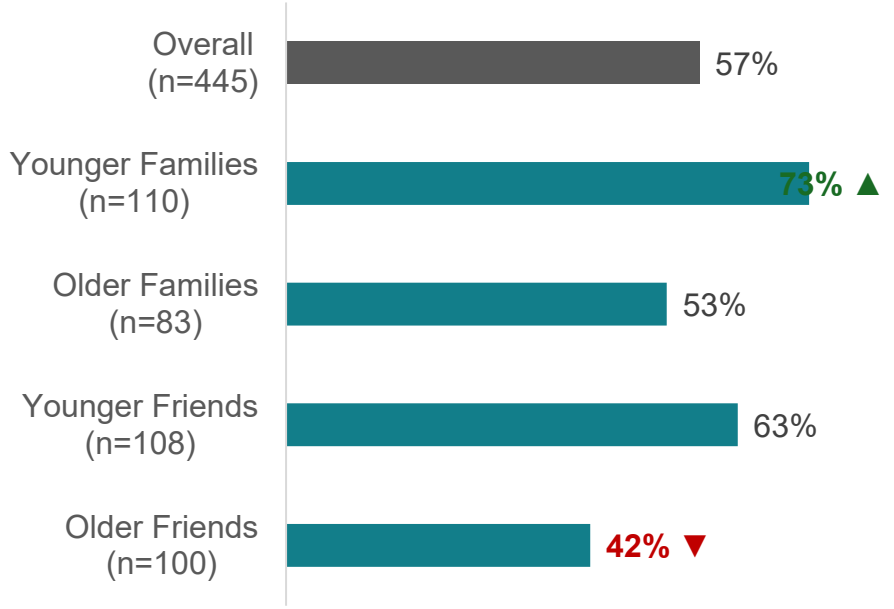
Younger families are more likely than other traveller types to have visited (73%), and older friend groups less likely (42%). Rest of Canada hunters are less likely than other markets to have visited (36%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all hunters (n=445). P1 (NET: At least once) In the past 5 years, how many times have you visited Northern Ontario for a hunting trip? % who have visited at least once shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – MARKET

All hunters

Half of hunters (51%) take about the same number of Northern Ontario hunting trips as 10 years ago, while 28% take more and 15% fewer.

U.S. Drive hunters are the most likely to be taking more trips (29%), although market differences are not significant.

Change in trips	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
I take more trips than I did 10 years ago	28%	16%	29%	21%
About the same as 10 years ago	51%	59%	52%	50%
I take fewer trips than I did 10 years ago	15%	20%	13%	17%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). P1B Compared to 10 years ago, how has your participation in hunting trips in Northern Ontario changed?

"Not sure" (7%) not shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be taking more trips (40%) and less likely to be taking fewer (7%), while older friend groups are less likely to be taking more trips (14%) and more likely to be taking fewer (29%).

Change in trips	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
I take more trips than I did 10 years ago	28%	40% ▲	27%	32%	14% ▼
About the same as 10 years ago	51%	46%	45%	51%	50%
I take fewer trips than I did 10 years ago	15%	7% ▼	19%	10%	29% ▲

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

Base: all hunters (n=445). P1B Compared to 10 years ago, how has your participation in hunting trips in Northern Ontario changed?

"Not sure" (7%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – MARKET

All hunters

About a quarter of hunters have visited each part of Northern Ontario, led by Northeast Ontario (26%), Sunset Country and Superior Country (24% each).

Rest of Canada hunters are less likely than other markets to have visited The Great Canadian Wilderness (5%).

Region	Overall (n=445)	Rest of Canada (n=49)	U.S. Drive (n=308)	U.S. Fly (n=64)
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	26%	16%	27%	21%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	24%	11%	26%	22%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	24%	16%	25%	20%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	23%	16%	24%	20%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	22%	5% ▼	23%	21%

▲ / ▼ Significantly higher / lower than the other markets

Base: all hunters (n=445). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. “Not sure” (0%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to have visited Sunset Country (37%), Algoma Country (34%), The Great Canadian Wilderness (33%) and Superior Country (31%).

Older friend groups are less likely to have visited Sunset Country (12%) and The Great Canadian Wilderness (5%).

Region	Overall (n=445)	Younger Families (n=110)	Older Families (n=83)	Younger Friends (n=108)	Older Friends (n=100)
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	26%	34%	16%	27%	25%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	24%	31% ▲	23%	26%	15%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	24%	37% ▲	21%	26%	12% ▼
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	23%	34% ▲	20%	24%	16%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	22%	33% ▲	20%	29%	5% ▼

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

Base: all hunters (n=445). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. "Not sure" (0%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – MARKET

Hunters who have visited Northern Ontario in the past 5 years

Four in ten past-five-year visitors (42%) took their most recent Northern Ontario hunting trip in the fall, followed by winter (22%), spring (20%) and summer (16%).

Fall trips range from 28% among U.S. Fly hunters to 62% among Rest of Canada hunters, whose base is small. None of the market differences are significant.

Season	Overall (n=255)	Rest of Canada* (n=18)	U.S. Drive (n=185)	U.S. Fly (n=31)
Winter (December – February)	22%	4%	24%	27%
Spring (March – May)	20%	10%	20%	29%
Summer (June – August)	16%	24%	15%	13%
Fall (September – November)	42%	62%	41%	28%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P3 Thinking about your most recent Northern Ontario trip that involved hunting, in what season did that trip take place?

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

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

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – TRAVELLER TYPE

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

Older families and older friend groups are the most likely to have taken their most recent trip in the fall (56% each).

None of the traveller type differences are significant.

Season	Overall (n=255)	Younger Families (n=80)	Older Families (n=44)	Younger Friends (n=68)	Older Friends (n=42)
Winter (December – February)	22%	25%	17%	26%	10%
Spring (March – May)	20%	25%	22%	18%	14%
Summer (June – August)	16%	14%	5%	19%	21%
Fall (September – November)	42%	35%	56%	37%	56%

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

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P3 Thinking about your most recent Northern Ontario trip that involved hunting, in what season did that trip take place?

“Not sure” (<1%) not shown.

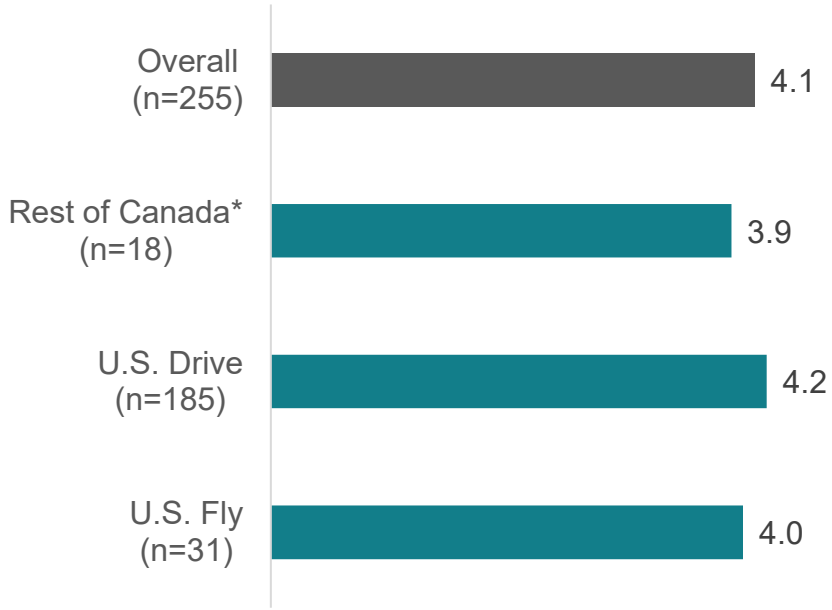
LENGTH OF MOST RECENT NORTHERN ONTARIO TRIP

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

The most recent Northern Ontario hunting trip lasted an average of 4.1 nights.

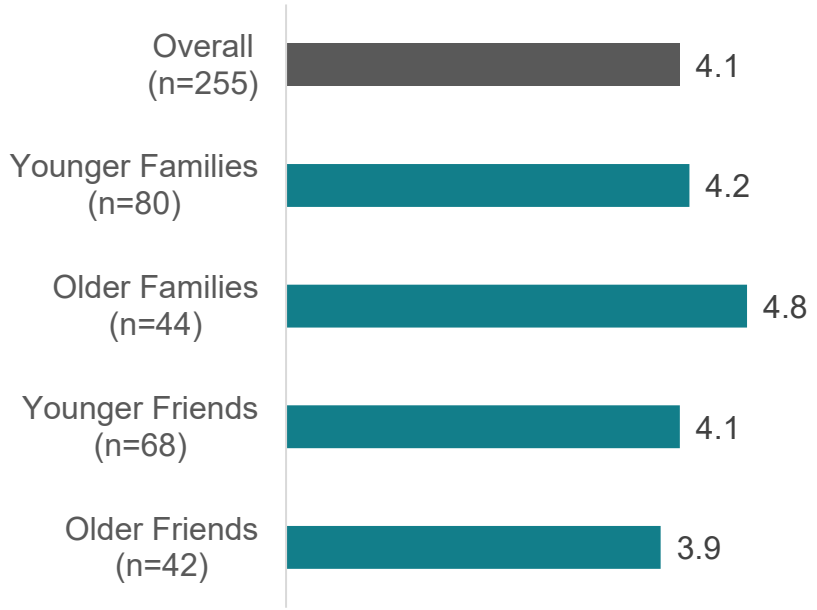
Trip length ranges from 3.9 nights among older friend groups to 4.8 among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P4 (AVG) Thinking about your most recent Northern Ontario trip that involved hunting, how long was that trip (total nights away from home)? AVG = average number of nights. *Small base (n<30); interpret with caution.

ACCOMMODATION ON MOST RECENT TRIP – MARKET

Hunters who have visited Northern Ontario in the past 5 years

A third of past-five-year visitors (33%) stayed in a hotel or motel on their most recent Northern Ontario hunting trip, and about a quarter in a commercial cottage or cabin rental (25%), backcountry camping (25%), an AirBnB (24%), a private cottage (23%) or a drive-in lodge or resort (22%).

None of the market differences are significant.

Accommodation	Overall (n=255)	Rest of Canada* (n=18)	U.S. Drive (n=185)	U.S. Fly (n=31)
Hotel or motel	33%	31%	33%	40%
Commercial cottage or cabin rental	25%	20%	25%	26%
Backcountry or wilderness camping	25%	26%	25%	17%
AirBnB	24%	9%	26%	32%
Private cottage (owned or borrowed)	23%	25%	20%	27%
Drive-in lodge or resort	22%	20%	21%	28%
Designated campground (private or provincial park)	19%	23%	18%	32%
Home of friends or relatives (unpaid)	16%	9%	15%	17%
Fly-in or remote outpost camp	13%	26%	10%	25%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P5 Thinking about your most recent Northern Ontario trip that involved hunting, where did you stay on that trip? Please select all that apply.
"Not sure" (0%) not shown.
*Small base (n<30); interpret with caution.

ACCOMMODATION ON MOST RECENT TRIP – TRAVELLER TYPE

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 have stayed in a commercial cottage or cabin rental (44%), and younger families in a private cottage (33%).

None of the traveller type differences are significant.

Accommodation	Overall (n=255)	Younger Families (n=80)	Older Families (n=44)	Younger Friends (n=68)	Older Friends (n=42)
Hotel or motel	33%	34%	25%	33%	27%
Commercial cottage or cabin rental	25%	21%	16%	24%	44%
Backcountry or wilderness camping	25%	29%	23%	29%	14%
AirBnB	24%	27%	28%	21%	15%
Private cottage (owned or borrowed)	23%	33%	28%	18%	19%
Drive-in lodge or resort	22%	27%	19%	23%	14%
Designated campground (private or provincial park)	19%	26%	20%	17%	8%
Home of friends or relatives (unpaid)	16%	22%	5%	17%	13%
Fly-in or remote outpost camp	13%	17%	13%	15%	7%

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

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P5 Thinking about your most recent Northern Ontario trip that involved hunting, where did you stay on that trip? Please select all that apply.
"Not sure" (0%) not shown.

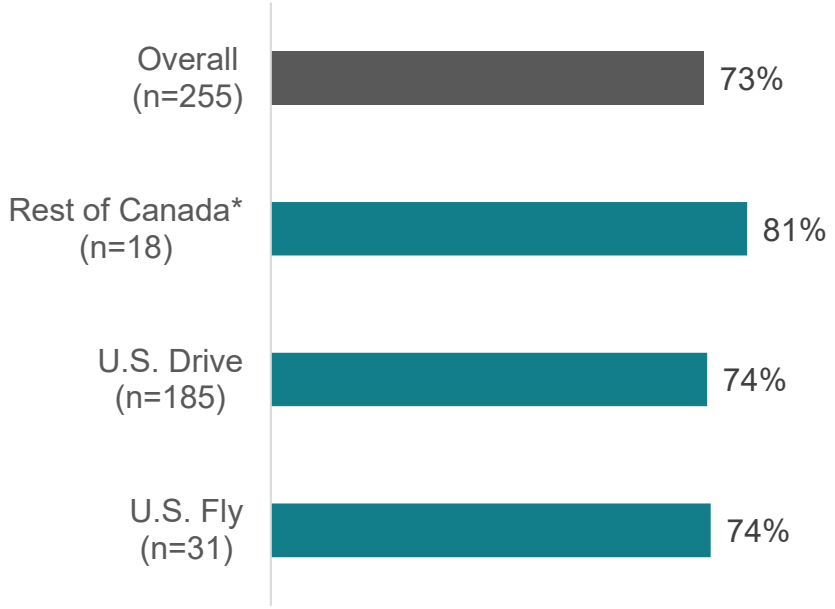
HIGH-YIELD VISITORS

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

Nearly three-quarters of past-five-year visitors (73%) stayed in paid roofed lodging on their most recent Northern Ontario trip, making them high-yield visitors.

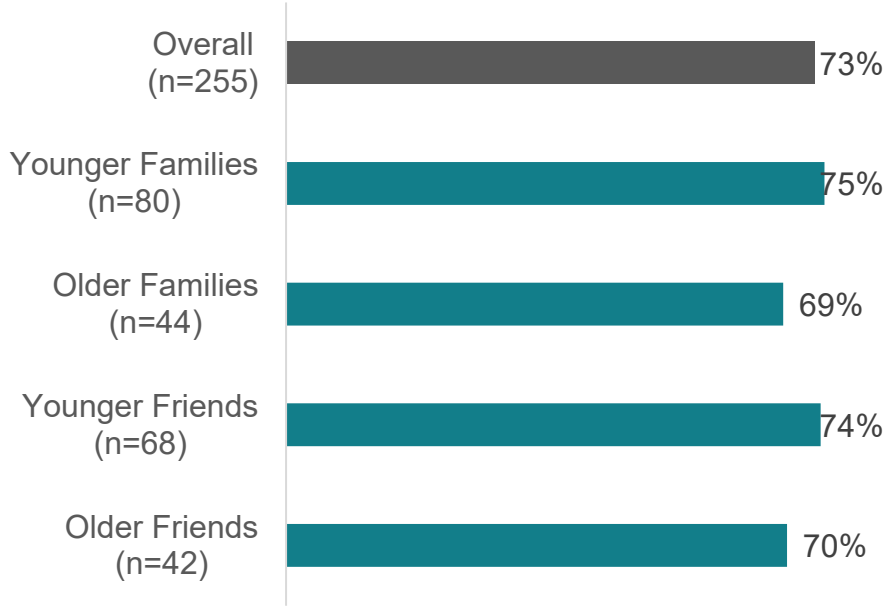
The share of high-yield visitors ranges from 69% among older families to 75% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P5_HY Thinking about your most recent Northern Ontario trip that involved hunting, where did you stay on that trip? Please select all that apply. High-yield = stayed in a drive-in lodge or resort, fly-in or remote outpost camp, commercial cottage or cabin rental, hotel or motel, or AirBnB (P5 codes 1–5). *Small base (n<30); interpret with caution

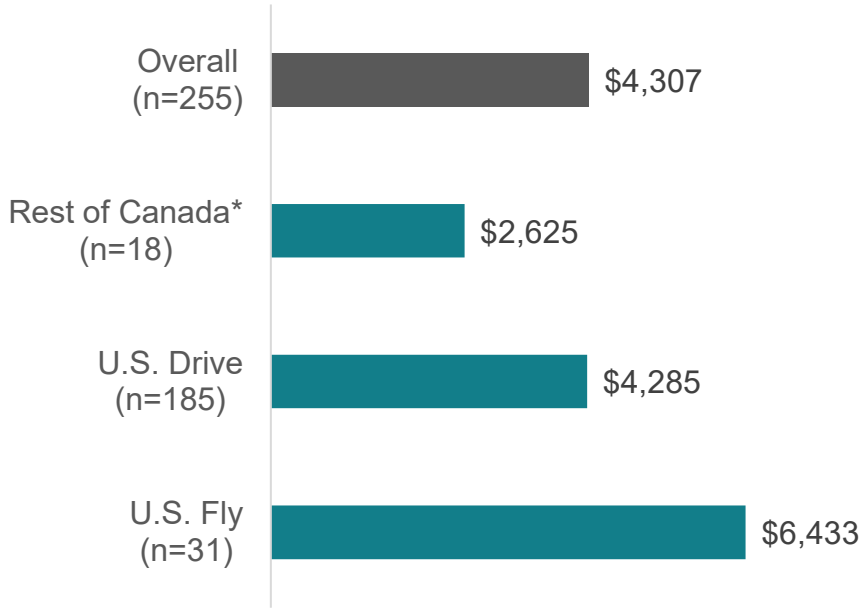
TRAVEL PARTY SPEND ON MOST RECENT NORTHERN ONTARIO TRIP

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

Travel parties spent an average of $4,307 on their most recent Northern Ontario hunting trip.

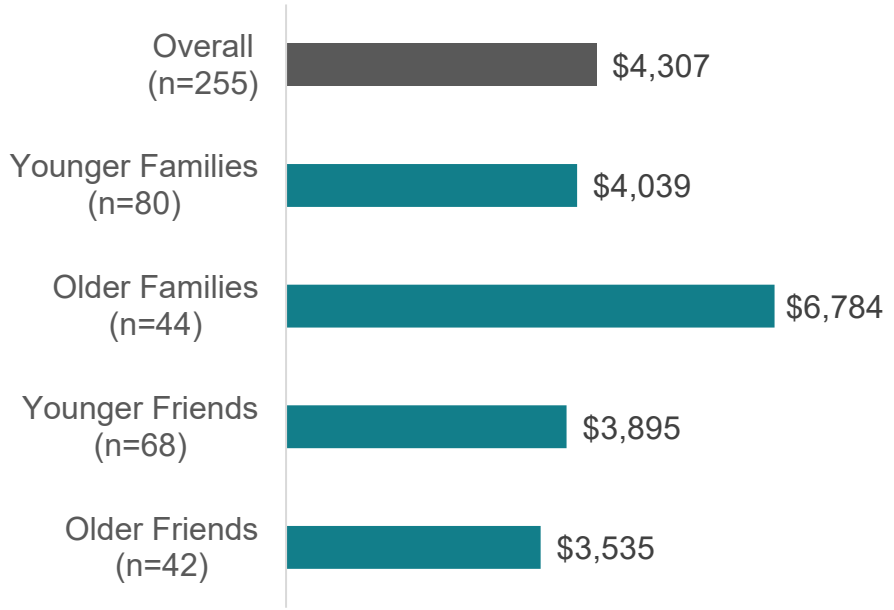
Spending is highest among U.S. Fly hunters ($6,433) and older families ($6,784), and lowest among Rest of Canada hunters ($2,625), although differences are not significant.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P6 (CAD) Approximately how much did your travel party spend in total on that Northern Ontario trip? Average total travel party spend in Canadian dollars; U.S. responses converted at 1.394. *Small base (n<30); interpret with caution.

SERVICES USED ON MOST RECENT TRIP – MARKET

Hunters who have visited Northern Ontario in the past 5 years

Half of past-five-year visitors used a local outfitter or guide service (53%), equipment or gear rental (51%) or a packaged experience (51%) on their most recent Northern Ontario hunting trip, and a fifth (21%) used a charter or float plane. Only 14% used none of these.

U.S. Fly hunters are the most likely to have used a local outfitter or guide (74%) and a charter or float plane (42%), although market differences are not significant.

Service	Overall (n=255)	Rest of Canada* (n=18)	U.S. Drive (n=185)	U.S. Fly (n=31)
Local outfitter or guide service	53%	49%	52%	74%
Equipment or gear rental	51%	36%	52%	65%
Packaged experience	51%	26%	53%	59%
Charter or float plane	21%	10%	18%	42%
None of the above	14%	30%	11%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P7 Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

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

SERVICES USED ON MOST RECENT TRIP – TRAVELLER TYPE

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 have bought a packaged experience (62%), and older friend groups the least likely (32%), although traveller type differences are not significant.

Service	Overall (n=255)	Younger Families (n=80)	Older Families (n=44)	Younger Friends (n=68)	Older Friends (n=42)
Local outfitter or guide service	53%	56%	54%	45%	53%
Equipment or gear rental	51%	56%	59%	49%	37%
Packaged experience	51%	62%	55%	51%	32%
Charter or float plane	21%	24%	31%	22%	5%
None of the above	14%	8%	17%	14%	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). P7 Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – MARKET

Hunters who have visited Northern Ontario in the past 5 years

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

None of the market differences are significant.

Role of Northern Ontario	Overall (n=255)	Rest of Canada* (n=18)	U.S. Drive (n=185)	U.S. Fly (n=31)
Northern Ontario was our primary and only destination	53%	69%	51%	53%
Northern Ontario was the main destination, with brief stops elsewhere	35%	10%	38%	30%
Northern Ontario was one of several equal destinations on the trip	9%	10%	8%	17%
Northern Ontario was a secondary stop on a trip focused elsewhere	2%	10%	2%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

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

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

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – TRAVELLER TYPE

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

Northern Ontario was the primary and only destination for 48% to 55% of each traveller type.

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=255)	Younger Families (n=80)	Older Families (n=44)	Younger Friends (n=68)	Older Friends (n=42)
Northern Ontario was our primary and only destination	53%	51%	55%	54%	48%
Northern Ontario was the main destination, with brief stops elsewhere	35%	39%	26%	36%	40%
Northern Ontario was one of several equal destinations on the trip	9%	9%	11%	9%	8%
Northern Ontario was a secondary stop on a trip focused elsewhere	2%	0%	6%	1%	4%

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

Base: hunters who have visited Northern Ontario for hunting in the past 5 years (n=255). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

“Not sure” (<1%) not shown.

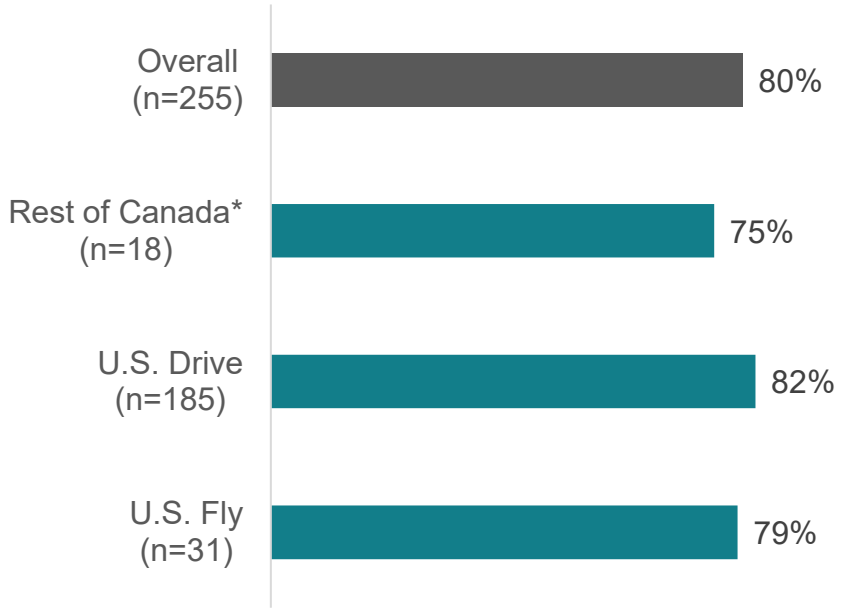
RATING OF MOST RECENT NORTHERN ONTARIO EXPERIENCE

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

Eight in ten past-five-year visitors (80%) rate their most recent Northern Ontario hunting experience as somewhat or much better than trips taken elsewhere, including half (48%) who rate it much better.

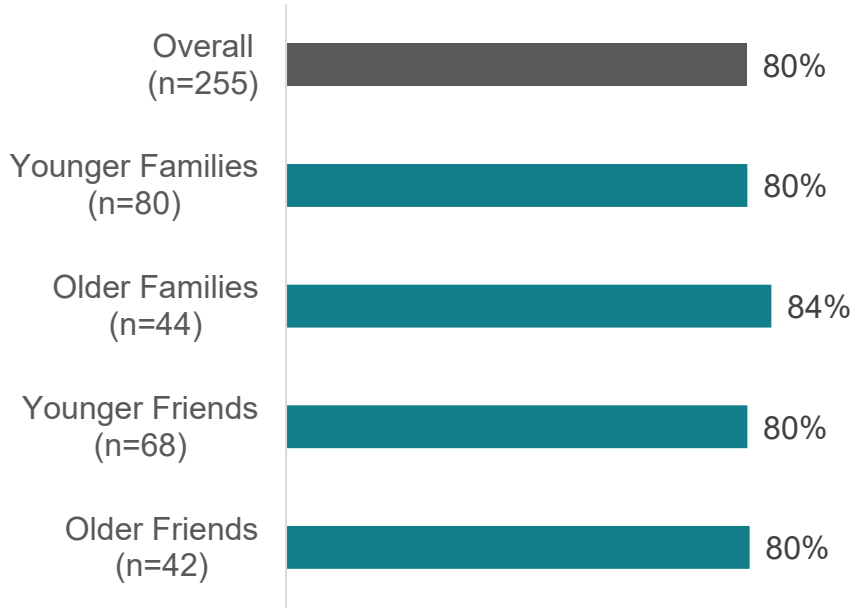
Ratings range from 79% among U.S. Fly hunters to 82% among U.S. Drive hunters, and from 80% to 84% among traveller types, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: hunters who have visited Northern Ontario for hunting in the past 5 years, excluding “Don’t know” (n=255). P8 (TOP2) Compared to hunting trips you have taken elsewhere, how would you rate your most recent Northern Ontario experience overall? TOP2 = % somewhat or much better. *Small base (n<30); interpret with caution.



PAST VISITORS VS. OVERALL

PAST VISITORS: LIKELIHOOD TO RECOMMEND (NPS) – MARKET

Hunters who know a lot or a little about Northern Ontario

Past visitors give Northern Ontario an NPS of 57, above the 34 among all hunters who know the region.

U.S. Drive visitors are more positive than their market overall (61 vs. 39). The Rest of Canada visitor base is small.

Measure	Overall (n=377 / 250)	Rest of Canada* (n=33 / 17)	U.S. Drive (n=272 / 182)	U.S. Fly (n=49 / 30)
NPS score	34	-14	39	40
	57 ▲	46	61 ▲	47

Know Northern Ontario (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who know a lot or a little about Northern Ontario (n=377; past visitors n=250). 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)

*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

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

Past visitors give Northern Ontario a higher NPS than hunters overall (57 vs. 34).

Visitors are more positive than their group overall among older families (62 vs. 35), younger friend groups (57 vs. 37) and younger families (54 vs. 37).

Measure	Overall (n=377 / 250)	Younger Families (n=101 / 78)	Older Families (n=67 / 43)	Younger Friends (n=92 / 67)	Older Friends (n=78 / 42)
NPS score	34	37	35	37	24
	57 ▲	54 ▲	62 ▲	57 ▲	60 ▲

Know Northern Ontario (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who know a lot or a little about Northern Ontario (n=377; past visitors n=250). 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)

*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters

Almost all past visitors (96%) are likely to visit Northern Ontario for hunting in the next two years, compared with 75% of hunters overall.

U.S. Drive (98% vs. 81%) and U.S. Fly visitors (98% vs. 71%) are more likely than their market overall to return. The Rest of Canada visitor base is small.

Response	Overall (n=442 / 254)	Rest of Canada* (n=47 / 18)	U.S. Drive (n=307 / 184)	U.S. Fly (n=64 / 31)
Likely to visit (TOP2)	75%	38%	81%	71%
	96% ▲	77%	98% ▲	98% ▲

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

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

Base: all hunters, excluding “Don’t know” (n=442; past visitors n=254). N4 (TOP2) How likely are you to visit Northern Ontario for a hunting trip in the next 2 years?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters | Traveller types are defined on slide 10

Past visitors are more likely than hunters overall to visit in the next two years (96% vs. 75%).

Visitors are more likely than their group overall to return among older families (100% vs. 71%), younger friend groups (96% vs. 82%) and younger families (95% vs. 86%).

Response	Overall (n=442 / 254)	Younger Families (n=110 / 80)	Older Families (n=82 / 43)	Younger Friends (n=108 / 68)	Older Friends (n=98 / 42)
Likely to visit (TOP2)	75%	86%	71%	82%	57%
	96% ▲	95% ▲	100% ▲	96% ▲	91% ▲

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

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

Base: all hunters, excluding “Don’t know” (n=442; past visitors n=254). N4 (TOP2) How likely are you to visit Northern Ontario for a hunting trip in the next 2 years?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (1 OF 6)

All hunters

Past visitors are less likely than hunters overall to be discouraged by expensive licensing requirements (15% vs. 26%) and high transportation costs (19% vs. 26%), while cost is cited at a similar rate.

U.S. Drive visitors are less likely than their market overall to cite expensive licensing requirements (13% vs. 24%). The Rest of Canada visitor base is small.

Barrier	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Cost	33%	56%	31%	27%
	27%	50%	25%	23%
Poor value for money	27%	41%	24%	28%
	23%	49%	20%	22%
High transportation costs (gas, airfare)	26%	40%	25%	20%
	19% ▼	14%	19%	15%
Expensive licensing requirements	26%	39%	24%	26%
	15% ▼	35%	13% ▼	11%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (2 OF 6)

All hunters

Past visitors are less likely to be discouraged by complicated licensing requirements (17% vs. 24%).

U.S. Drive visitors are less likely than their market overall to cite complicated licensing requirements (13% vs. 21%).

Barrier	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Unfavourable weather or season timing	24%	26%	24%	19%
	22%	33%	18%	22%
Wildfires, flooding, or other environmental disruptions	24%	25%	25%	23%
	20%	15%	20%	24%
Complicated licensing requirements	24%	35%	21%	28%
	17% ▼	26%	13% ▼	29%
Concerns about safety	23%	20%	24%	23%
	23%	32%	21%	26%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (3 OF 6)

All hunters

Past visitors are less likely to say Northern Ontario is too far to drive (12% vs. 18%).

Within each market, differences between visitors and the market overall are not significant on these barriers; the Rest of Canada visitor base is small.

Barrier	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Poor road or water access	20%	32%	18%	21%
	17%	31%	14%	18%
Unfamiliar or unclear regulations	20%	22%	20%	20%
	15%	24%	15%	11%
Anti-American sentiment	19%	–	21%	33%
	13%	–	13%	27%
Too far to drive	18%	38%	15%	15%
	12% ▼	10%	10%	12%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (4 OF 6)

All hunters

Past visitors cite each barrier on this slide at a similar rate to hunters overall.

Within each market, differences between visitors and the market overall are not significant on these barriers; the Rest of Canada visitor base is small.

Barrier	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Limited accommodation options	16%	19%	16%	13%
	15%	18%	14%	9%
Lack of amenities or services at the destination	16%	15%	14%	25%
	15%	19%	12%	29%
Insects (e.g., blackflies, mosquitoes)	15%	14%	15%	15%
	15%	21%	12%	22%
Availability of campsites	15%	10%	14%	14%
	15%	18%	12%	16%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (5 OF 6)

All hunters

Past visitors cite each barrier on this slide at a similar rate to hunters overall.

Within each market, differences between visitors and the market overall are not significant on these barriers; the Rest of Canada visitor base is small.

Barrier	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Concerns about crossing the Canada-US border	15%	–	16%	23%
	11%	–	12%	18%
Poor or unreliable cell phone or internet connectivity	14%	11%	17%	2%
	14%	13%	15%	5%
Difficulty finding reliable trip planning information	13%	19%	11%	16%
	12%	21%	8%	24%
Passport or documentation requirements	12%	–	15%	17%
	11%	–	11%	24%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (6 OF 6)

All hunters

Past visitors are less likely to say they do not know enough about Northern Ontario's hunting opportunities (2% vs. 8%).

U.S. Drive visitors are less likely than their market overall to say this (1% vs. 6%).

Barrier	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Too remote or rugged for my comfort level	11%	5%	11%	10%
	9%	11%	10%	3%
Not sure the hunting quality would meet my expectations	9%	13%	9%	6%
	6%	4%	5%	5%
I do not know enough about Northern Ontario's hunting opportunities	8%	17%	6%	11%
	2% ▼	4%	1% ▼	7%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (1 OF 6)

All hunters | Traveller types are defined on slide 10

Past visitors are less likely than hunters overall to be discouraged by expensive licensing requirements (15% vs. 26%) and high transportation costs (19% vs. 26%).

Older friend group visitors are much less likely than their group overall to cite expensive licensing requirements (15% vs. 37%), as are younger family visitors (14% vs. 20%).

Barrier	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Cost	33%	29%	24%	34%	51%
	27%	25%	9%	29%	52%
Poor value for money	27%	23%	28%	22%	37%
	23%	23%	26%	14%	37%
High transportation costs (gas, airfare)	26%	19%	29%	22%	38%
	19% ▼	14%	21%	16%	32%
Expensive licensing requirements	26%	20%	28%	23%	37%
	15% ▼	14% ▼	17%	16%	15% ▼

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (2 OF 6)

All hunters | Traveller types are defined on slide 10

Past visitors are less likely to be discouraged by complicated licensing requirements (17% vs. 24%).

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

Barrier	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Unfavourable weather or season timing	24%	19%	22%	21%	35%
	22%	18%	18%	22%	29%
Wildfires, flooding, or other environmental disruptions	24%	19%	26%	23%	29%
	20%	19%	21%	21%	19%
Complicated licensing requirements	24%	18%	27%	19%	35%
	17% ▼	15%	28%	13%	18%
Concerns about safety	23%	23%	23%	25%	22%
	23%	21%	25%	29%	20%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (3 OF 6)

All hunters | Traveller types are defined on slide 10

Past visitors are less likely to say Northern Ontario is too far to drive (12% vs. 18%).

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

Barrier	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Poor road or water access	20%	16%	22%	20%	25%
	17%	14%	10%	16%	35%
Unfamiliar or unclear regulations	20%	17%	17%	22%	21%
	15%	18%	12%	17%	10%
Anti-American sentiment	19%	18%	24%	14%	18%
	13%	14%	19%	12%	3%
Too far to drive	18%	16%	10%	20%	20%
	12% ▼	12%	8%	12%	9%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (4 OF 6)

All hunters | Traveller types are defined on slide 10

Past visitors cite each barrier on this slide at a similar rate to hunters overall.

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

Barrier	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Limited accommodation options	16%	13%	21%	12%	17%
	15%	15%	13%	14%	15%
Lack of amenities or services at the destination	16%	16%	22%	13%	15%
	15%	18%	15%	14%	15%
Insects (e.g., blackflies, mosquitoes)	15%	9%	22%	14%	18%
	15%	10%	19%	16%	20%
Availability of campsites	15%	15%	15%	12%	15%
	15%	14%	16%	12%	12%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (5 OF 6)

All hunters | Traveller types are defined on slide 10

Past visitors cite each barrier on this slide at a similar rate to hunters overall.

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

Barrier	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Concerns about crossing the Canada-US border	15%	16%	15%	17%	14%
	11%	11%	10%	14%	7%
Poor or unreliable cell phone or internet connectivity	14%	17%	14%	11%	15%
	14%	19%	13%	13%	10%
Difficulty finding reliable trip planning information	13%	11%	10%	16%	14%
	12%	11%	10%	20%	7%
Passport or documentation requirements	12%	10%	11%	15%	15%
	11%	10%	12%	13%	5%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters | Traveller types are defined on slide 10

Past visitors are less likely to say they do not know enough about Northern Ontario's hunting opportunities (2% vs. 8%).

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

Barrier	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Too remote or rugged for my comfort level	11%	16%	4%	8%	13%
	9%	16%	3%	9%	10%
Not sure the hunting quality would meet my expectations	9%	11%	9%	8%	7%
	6%	10%	0%	6%	7%
I do not know enough about Northern Ontario's hunting opportunities	8%	6%	9%	5%	12%
	2% ▼	4%	0%	1%	0%

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

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

Base: all hunters (n=445; past visitors n=255). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: INDEPENDENT VS. GUIDED HUNTING – MARKET

All hunters

Past visitors are more likely than hunters overall to use a mix of guided and self-guided hunting (53% vs. 41%) and less likely to go fully self-guided (45% vs. 57%).

The shift toward guided hunting holds among U.S. Drive visitors (54% vs. 43% mixing guided and self-guided) and U.S. Fly visitors (62% vs. 42%). The Rest of Canada visitor base is small.

Approach	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
I mainly go on my own or with my own group – fully self-guided	57%	70%	56%	56%
	45% ▼	59%	45% ▼	33% ▼
I use a mix of guided and self-guided	41%	30%	43%	42%
	53% ▲	41%	54% ▲	62% ▲
I mainly use guided or outfitted experiences provided by operators	1%	0%	1%	2%
	2%	0%	2%	5%

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

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

Base: all hunters (n=445; past visitors n=255). T6 When you go on a hunting trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (0%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: INDEPENDENT VS. GUIDED HUNTING – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Past visitors are more likely than hunters overall to use a mix of guided and self-guided hunting (53% vs. 41%).

Visitors are more likely than their group overall to mix guided and self-guided hunting among older friend groups (57% vs. 37%), older families (59% vs. 44%) and younger friend groups (54% vs. 46%).

Approach	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
I mainly go on my own or with my own group – fully self-guided	57%	55%	56%	52%	63%
	45% ▼	50%	41% ▼	43% ▼	43% ▼
I use a mix of guided and self-guided	41%	44%	44%	46%	37%
	53% ▲	49%	59% ▲	54% ▲	57% ▲
I mainly use guided or outfitted experiences provided by operators	1%	1%	0%	2%	0%
	2%	1%	0%	3%	0%

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

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

Base: all hunters (n=445; past visitors n=255). T6 When you go on a hunting trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (0%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (1 OF 4)

All hunters

Past visitors are less likely than hunters overall to rely on word of mouth (44% vs. 55%), while their use of other leading sources is similar.

Within each market, differences between visitors and the market overall are not significant on these sources; the Rest of Canada visitor base is small.

Source	Overall (n=439 / 253)	Rest of Canada* (n=48 / 18)	U.S. Drive (n=303 / 183)	U.S. Fly (n=64 / 31)
Word of mouth (e.g., friends or family)	55%	80%	52%	56%
	44% ▼	62%	44%	37%
General internet search (e.g., Google, Bing)	43%	33%	46%	38%
	39%	19%	43%	29%
Social media content (e.g., Instagram, Facebook, YouTube)	34%	32%	34%	35%
	35%	47%	33%	39%
Outfitter or lodge websites	33%	33%	32%	41%
	29%	26%	25%	55%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	16%	36%	30%
	36%	20%	38%	46%

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

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

Base: all hunters (n=439; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (2 OF 4)

All hunters

Past visitors use each source on this slide at a similar rate to hunters overall.

Within each market, differences between visitors and the market overall are not significant on these sources; the Rest of Canada visitor base is small.

Source	Overall (n=439 / 253)	Rest of Canada* (n=48 / 18)	U.S. Drive (n=303 / 183)	U.S. Fly (n=64 / 31)
Outdoor or sporting magazines or publications	31%	23%	32%	23%
	26%	15%	26%	16%
TV shows or documentaries	29%	31%	28%	25%
	28%	24%	24%	26%
Official tourism websites (e.g., national, provincial, state, regional, city)	27%	17%	29%	25%
	27%	19%	29%	29%
AI tools (e.g., ChatGPT, Gemini, Copilot)	25%	20%	26%	28%
	28%	32%	28%	32%
Magazines, travel guides or brochures	24%	26%	23%	26%
	23%	18%	21%	29%

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

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

Base: all hunters (n=439; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (3 OF 4)

All hunters

Past visitors use each source on this slide at a similar rate to hunters overall.

Within each market, differences between visitors and the market overall are not significant on these sources; the Rest of Canada visitor base is small.

Source	Overall (n=439 / 253)	Rest of Canada* (n=48 / 18)	U.S. Drive (n=303 / 183)	U.S. Fly (n=64 / 31)
Travel information centres or visitor centres	24%	20%	23%	28%
	26%	20%	24%	28%
Articles, blogs, or videos about travel destinations	23%	15%	25%	26%
	22%	8%	23%	26%
Social media influencers	21%	7%	21%	29%
	24%	9%	24%	23%
Forums or online communities	21%	12%	20%	22%
	19%	10%	16%	27%
Consumer shows/exhibitions	15%	21%	12%	16%
	16%	20%	11%	19%

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

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

Base: all hunters (n=439; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters

Past visitors use each source on this slide at a similar rate to hunters overall.

Within each market, differences between visitors and the market overall are not significant on these sources; the Rest of Canada visitor base is small.

Source	Overall (n=439 / 253)	Rest of Canada* (n=48 / 18)	U.S. Drive (n=303 / 183)	U.S. Fly (n=64 / 31)
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	14%	16%	14%	11%
	17%	12%	16%	16%
Travel agents	13%	6%	14%	11%
	17%	15%	16%	20%
Email newsletters	8%	6%	9%	5%
	9%	11%	8%	11%
Travel-related phone lines or hotlines	8%	4%	9%	5%
	11%	8%	10%	11%

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

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

Base: all hunters (n=439; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (1 OF 4)

All hunters | Traveller types are defined on slide 10

Past visitors are less likely than hunters overall to rely on word of mouth (44% vs. 55%).

Younger friend group visitors are less likely than their group overall to rely on word of mouth (47% vs. 58%).

Source	Overall (n=439 / 253)	Younger Families (n=108 / 79)	Older Families (n=83 / 44)	Younger Friends (n=107 / 68)	Older Friends (n=97 / 42)
Word of mouth (e.g., friends or family)	55%	41%	56%	58%	65%
	44% ▼	35%	47%	47% ▼	62%
General internet search (e.g., Google, Bing)	43%	47%	37%	43%	40%
	39%	41%	28%	39%	50%
Social media content (e.g., Instagram, Facebook, YouTube)	34%	37%	37%	35%	28%
	35%	36%	41%	33%	34%
Outfitter or lodge websites	33%	29%	37%	29%	37%
	29%	27%	39%	30%	19%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	32%	29%	36%	32%	27%
	36%	34%	42%	35%	35%

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

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

Base: all hunters (n=439; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (2 OF 4)

All hunters | Traveller types are defined on slide 10

Past visitors use each source on this slide at a similar rate to hunters overall.

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

Source	Overall (n=439 / 253)	Younger Families (n=108 / 79)	Older Families (n=83 / 44)	Younger Friends (n=107 / 68)	Older Friends (n=97 / 42)
Outdoor or sporting magazines or publications	31%	21%	32%	31%	39%
	26%	20%	32%	25%	38%
TV shows or documentaries	29%	26%	29%	30%	33%
	28%	26%	39%	25%	29%
Official tourism websites (e.g., national, provincial, state, regional, city)	27%	24%	22%	29%	32%
	27%	29%	18%	34%	23%
AI tools (e.g., ChatGPT, Gemini, Copilot)	25%	30%	26%	29%	14%
	28%	32%	27%	34%	15%
Magazines, travel guides or brochures	24%	19%	32%	23%	25%
	23%	22%	33%	21%	20%

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

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

Base: all hunters (n=439; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (3 OF 4)

All hunters | Traveller types are defined on slide 10

Past visitors use each source on this slide at a similar rate to hunters overall.

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

Source	Overall (n=439 / 253)	Younger Families (n=108 / 79)	Older Families (n=83 / 44)	Younger Friends (n=107 / 68)	Older Friends (n=97 / 42)
Travel information centres or visitor centres	24%	20%	24%	26%	22%
	26%	21%	29%	28%	23%
Articles, blogs, or videos about travel destinations	23%	19%	24%	22%	27%
	22%	20%	27%	16%	27%
Social media influencers	21%	27%	20%	22%	14%
	24%	27%	20%	24%	24%
Forums or online communities	21%	17%	20%	25%	19%
	19%	17%	17%	19%	24%
Consumer shows/exhibitions	15%	12%	15%	14%	19%
	16%	13%	12%	13%	27%

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

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

Base: all hunters (n=439; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters | Traveller types are defined on slide 10

Past visitors use each source on this slide at a similar rate to hunters overall.

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

Source	Overall (n=439 / 253)	Younger Families (n=108 / 79)	Older Families (n=83 / 44)	Younger Friends (n=107 / 68)	Older Friends (n=97 / 42)
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	14%	12%	20%	20%	7%
	17%	12%	20%	21%	14%
Travel agents	13%	16%	15%	15%	7%
	17%	22%	5%	20%	17%
Email newsletters	8%	9%	11%	5%	9%
	9%	11%	9%	6%	12%
Travel-related phone lines or hotlines	8%	13%	7%	6%	5%
	11%	18%	8%	8%	7%

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

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

Base: all hunters (n=439; past visitors n=253). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (1 OF 2)

Hunters who use social media to plan

Past visitors who use social media are more likely than social media users overall to use Instagram (72% vs. 61%) and TikTok (55% vs. 45%).

U.S. Drive visitors are more likely than their market overall to use Instagram (73% vs. 59%) and TikTok (60% vs. 47%). The Rest of Canada visitor base is small.

Platform	Overall (n=176 / 111)	Rest of Canada* (n=16 / 10)	U.S. Drive (n=124 / 78)	U.S. Fly* (n=26 / 14)
YouTube	82%	77%	82%	84%
	83%	69%	84%	84%
Facebook	77%	68%	80%	76%
	73%	64%	76%	72%
Instagram	61%	26%	59%	81%
	72% ▲	24%	73% ▲	89%
TikTok	45%	28%	47%	48%
	55% ▲	31%	60% ▲	52%
Reddit	37%	18%	41%	36%
	34%	15%	37%	39%

Social media users (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who use social media to plan (B4) (n=176; past visitors n=111). 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) for overall or visitors; interpret with caution. Significance not tested.

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

Hunters who use social media to plan

Past visitors are also more likely to use Snapchat (32% vs. 24%) and WhatsApp (31% vs. 22%).

U.S. Drive visitors are more likely than their market overall to use X (48% vs. 37%) and Snapchat (38% vs. 26%).

Platform	Overall (n=176 / 111)	Rest of Canada* (n=16 / 10)	U.S. Drive (n=124 / 78)	U.S. Fly* (n=26 / 14)
X (formerly known as Twitter)	37%	20%	37%	49%
	44%	14%	48% ▲	50%
Snapchat	24%	4%	26%	22%
	32% ▲	0%	38% ▲	25%
WhatsApp	22%	0%	22%	24%
	31% ▲	0%	32% ▲	41%
Pinterest	21%	0%	23%	30%
	26%	0%	30%	31%
Threads	16%	0%	18%	16%
	22% ▲	0%	25%	30%

Social media users (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who use social media to plan (B4) (n=176; past visitors n=111). 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) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (1 OF 2)

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

Past visitors who use social media are more likely than social media users overall to use Instagram (72% vs. 61%) and TikTok (55% vs. 45%).

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

Platform	Overall (n=176 / 111)	Younger Families (n=52 / 39)	Older Families* (n=33 / 20)	Younger Friends* (n=45 / 29)	Older Friends* (n=31 / 16)
YouTube	82%	86%	81%	78%	78%
	83%	86%	89%	71%	93%
Facebook	77%	75%	78%	67%	88%
	73%	72%	63%	68%	93%
Instagram	61%	74%	63%	62%	42%
	72% ▲	80%	72%	76%	46%
TikTok	45%	53%	47%	53%	18%
	55% ▲	58%	53%	61%	27%
Reddit	37%	30%	48%	44%	26%
	34%	28%	58%	38%	20%

Social media users (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who use social media to plan (B4) (n=176; past visitors n=111). 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) for overall or visitors; interpret with caution. Significance not tested.

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

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

Past visitors are also more likely to use Snapchat (32% vs. 24%) and WhatsApp (31% vs. 22%).

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

Platform	Overall (n=176 / 111)	Younger Families (n=52 / 39)	Older Families* (n=33 / 20)	Younger Friends* (n=45 / 29)	Older Friends* (n=31 / 16)
X (formerly known as Twitter)	37%	49%	37%	33%	23%
	44%	50%	35%	47%	38%
Snapchat	24%	31%	32%	21%	9%
	32% ▲	39%	48%	26%	9%
WhatsApp	22%	30%	19%	19%	14%
	31% ▲	39%	25%	28%	27%
Pinterest	21%	29%	25%	20%	13%
	26%	35%	20%	26%	16%
Threads	16%	14%	26%	13%	15%
	22% ▲	19%	32%	19%	30%

Social media users (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who use social media to plan (B4) (n=176; past visitors n=111). 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) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – MARKET

All hunters

Past visitors are more likely than hunters overall to use AI tools to plan their next hunting trip (78% vs. 65%).

U.S. Fly (90% vs. 71%) and U.S. Drive visitors (79% vs. 69%) are more likely than their market overall to use AI tools. The Rest of Canada visitor base is small.

Response	Overall (n=440 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=307 / 185)	U.S. Fly (n=62 / 31)
Likely to use AI tools (TOP2)	65%	34%	69%	71%
	78% ▲	59%	79% ▲	90% ▲

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

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

Base: all hunters, excluding “Don’t know” (n=440; past visitors n=255). 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?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Past visitors are more likely than hunters overall to use AI tools to plan (78% vs. 65%).

Visitors are more likely than their group overall to use AI tools among older families (84% vs. 66%), older friend groups (71% vs. 51%) and younger families (83% vs. 74%).

Response	Overall (n=440 / 255)	Younger Families (n=110 / 80)	Older Families (n=82 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=97 / 42)
Likely to use AI tools (TOP2)	65%	74%	66%	64%	51%
	78% ▲	83% ▲	84% ▲	71%	71% ▲

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

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

Base: all hunters, excluding “Don’t know” (n=440; past visitors n=255). 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?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GAME TYPES TARGETED – MARKET (1 OF 2)

All hunters

Past visitors are more likely than hunters overall to target small game (66% vs. 59%) and waterfowl (55% vs. 48%), and less likely to target white-tailed deer (75% vs. 81%).

U.S. Drive visitors are less likely than their market overall to target white-tailed deer (77% vs. 83%). The Rest of Canada visitor base is small.

Game type	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
White-tailed deer	81%	82%	83%	80%
	75% ▼	71%	77% ▼	67%
Small game (rabbits, squirrels)	59%	31%	62%	61%
	66% ▲	34%	68%	63%
Upland birds (grouse, pheasant, turkey)	54%	43%	58%	45%
	55%	33%	59%	46%
Waterfowl (ducks, geese)	48%	25%	52%	55%
	55% ▲	24%	57%	71%

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

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

Base: all hunters (n=445; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GAME TYPES TARGETED – MARKET (2 OF 2)

All hunters

Past visitors are more likely than hunters overall to target moose (32% vs. 25%) and wolf (10% vs. 6%).

U.S. Drive visitors are more likely than their market overall to target moose (26% vs. 19%), and U.S. Fly visitors bear (43% vs. 26%).

Game type	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Elk / caribou	33%	37%	32%	32%
	35%	19%	36%	38%
Moose	25%	59%	19%	17%
	32% ▲	86%	26% ▲	27%
Bear	21%	29%	19%	26%
	25%	33%	22%	43% ▲
Wolf	6%	7%	6%	9%
	10% ▲	12%	9%	18%

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

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

Base: all hunters (n=445; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GAME TYPES TARGETED – TRAVELLER TYPE (1 OF 2)

All hunters | Traveller types are defined on slide 10

Past visitors are more likely than hunters overall to target small game (66% vs. 59%) and waterfowl (55% vs. 48%), and less likely to target white-tailed deer (75% vs. 81%).

Younger friend group visitors are less likely than their group overall to target white-tailed deer (73% vs. 80%).

Game type	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
White-tailed deer	81%	76%	87%	80%	90%
	75% ▼	71%	83%	73% ▼	84%
Small game (rabbits, squirrels)	59%	62%	50%	67%	59%
	66% ▲	64%	54%	70%	76%
Upland birds (grouse, pheasant, turkey)	54%	56%	58%	49%	55%
	55%	61%	55%	52%	59%
Waterfowl (ducks, geese)	48%	57%	51%	42%	47%
	55% ▲	64%	59%	47%	48%

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

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

Base: all hunters (n=445; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GAME TYPES TARGETED – TRAVELLER TYPE (2 OF 2)

All hunters | Traveller types are defined on slide 10

Past visitors are more likely than hunters overall to target moose (32% vs. 25%) and wolf (10% vs. 6%).

Older friend group visitors are more likely than their group overall to target moose (37% vs. 20%).

Game type	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Elk / caribou	33%	33%	29%	40%	32%
	35%	36%	40%	38%	26%
Moose	25%	23%	25%	31%	20%
	32% ▲	24%	32%	38%	37% ▲
Bear	21%	26%	22%	24%	10%
	25%	32%	23%	25%	13%
Wolf	6%	10%	6%	6%	3%
	10% ▲	13%	9%	8%	6%

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

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

Base: all hunters (n=445; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GETTING TO DESTINATIONS – MARKET

All hunters

Past visitors are more likely than hunters overall to fly to a regional hub and then drive (35% vs. 26%) or to use a float plane or charter flight (18% vs. 11%).

U.S. Fly visitors are more likely than their market overall to fly to a regional hub (49% vs. 29%), and U.S. Drive visitors to fly to a hub (34% vs. 26%) or use a float plane or charter (17% vs. 12%). The Rest of Canada visitor base is small.

Mode of travel	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Personal vehicle (car, truck, SUV)	83%	81%	84%	79%
	82%	72%	82%	86%
Personal vehicle with trailer (e.g., boat, camper, ATV)	54%	55%	55%	47%
	54%	54%	56%	44%
Fly to a regional hub, then drive	26%	15%	26%	29%
	35% ▲	23%	34% ▲	49% ▲
RV / motorhome	18%	13%	19%	22%
	22%	21%	23%	23%
Float plane or charter flight to a remote destination	11%	8%	12%	10%
	18% ▲	15%	17% ▲	20%

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

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

Base: all hunters (n=445; past visitors n=255). T3 How do you typically get to your hunting destinations? Please select all that apply.
"Not sure" (0%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GETTING TO DESTINATIONS – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Past visitors are more likely than hunters overall to fly to a regional hub and then drive (35% vs. 26%) or to use a float plane or charter flight (18% vs. 11%).

Older friend group visitors are more likely than their group overall to fly to a regional hub (42% vs. 21%).

Mode of travel	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Personal vehicle (car, truck, SUV)	83%	83%	86%	78%	84%
	82%	85%	90%	77%	78%
Personal vehicle with trailer (e.g., boat, camper, ATV)	54%	55%	51%	48%	61%
	54%	56%	52%	49%	67%
Fly to a regional hub, then drive	26%	28%	28%	29%	21%
	35% ▲	33%	39%	34%	42% ▲
RV / motorhome	18%	24%	21%	24%	7%
	22%	29%	23%	21%	10%
Float plane or charter flight to a remote destination	11%	17%	17%	10%	4%
	18% ▲	22%	25%	13%	9%

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

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

Base: all hunters (n=445; past visitors n=255). T3 How do you typically get to your hunting destinations? Please select all that apply.
"Not sure" (0%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: ROLE IN A FUTURE TRIP – MARKET

All hunters

Past visitors see Northern Ontario's role in a future hunting trip much as hunters overall do, with most making it the only or primary destination.

Within each market, differences between visitors and the market overall are not significant on these items; the Rest of Canada visitor base is small.

Role of Northern Ontario	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
It would be the only destination of the trip	32%	42%	31%	29%
	33%	38%	32%	30%
It would be the primary destination, with brief stops elsewhere	49%	41%	52%	48%
	51%	34%	55%	45%
It would be one of several equal destinations	14%	14%	14%	17%
	15%	28%	13%	22%
It would be a secondary stop on a trip focused elsewhere	2%	1%	1%	5%
	1%	0%	<1%	2%

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

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

Base: all hunters (n=445; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: ROLE IN A FUTURE TRIP – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

Past visitors see Northern Ontario's role in a future hunting trip much as hunters overall do, with most making it the only or primary destination.

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

Role of Northern Ontario	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
It would be the only destination of the trip	32%	32%	31%	31%	31%
	33%	36%	36%	28%	26%
It would be the primary destination, with brief stops elsewhere	49%	52%	43%	53%	49%
	51%	50%	42%	57%	59%
It would be one of several equal destinations	14%	13%	23%	15%	12%
	15%	13%	22%	14%	15%
It would be a secondary stop on a trip focused elsewhere	2%	3%	0%	1%	4%
	1%	2%	0%	0%	0%

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

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

Base: all hunters (n=445; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters

Past visitors are less likely than hunters overall to prefer backcountry or wilderness camping (40% vs. 48%) and drive-in lodges or resorts (33% vs. 40%).

U.S. Drive visitors are less likely than their market overall to prefer backcountry camping (42% vs. 52%). The Rest of Canada visitor base is small.

Lodging option	Overall (n=442 / 255)	Rest of Canada* (n=48 / 18)	U.S. Drive (n=306 / 185)	U.S. Fly (n=64 / 31)
Backcountry or wilderness camping	48%	27%	52%	55%
	40% ▼	26%	42% ▼	38%
Private cottage (owned or borrowed)	43%	44%	43%	42%
	38%	39%	37%	43%
Commercial cottage or cabin rental	41%	39%	41%	44%
	35%	24%	35%	43%
Drive-in lodge or resort	40%	44%	40%	32%
	33% ▼	14%	34%	27%
Designated campground (private or provincial park)	37%	23%	38%	43%
	32%	14%	33%	31%

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

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

Base: all hunters (n=442; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

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

All hunters

Past visitors' preferences for the lodging options on this slide are similar to those of hunters overall.

Within each market, differences between visitors and the market overall are not significant on these options; the Rest of Canada visitor base is small.

Lodging option	Overall (n=442 / 255)	Rest of Canada* (n=48 / 18)	U.S. Drive (n=306 / 185)	U.S. Fly (n=64 / 31)
Hotel or motel	35%	29%	36%	40%
	37%	34%	38%	43%
AirBnB	31%	21%	33%	30%
	31%	17%	31%	37%
Fly-in or remote outpost camp	25%	29%	25%	23%
	22%	24%	20%	31%
Home of friends or relatives (unpaid)	20%	25%	17%	19%
	22%	11%	18%	22%

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

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

Base: all hunters (n=442; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

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

All hunters | Traveller types are defined on slide 10

Past visitors are less likely than hunters overall to prefer backcountry or wilderness camping (40% vs. 48%) and drive-in lodges or resorts (33% vs. 40%).

Younger family visitors are less likely than their group overall to prefer backcountry camping (36% vs. 44%), and younger friend group visitors designated campgrounds (20% vs. 30%).

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

Lodging option	Overall (n=442 / 255)	Younger Families (n=110 / 80)	Older Families (n=81 / 44)	Younger Friends (n=107 / 68)	Older Friends (n=100 / 42)
Backcountry or wilderness camping	48%	44%	44%	51%	51%
	40% ▼	36% ▼	40%	43%	42%
Private cottage (owned or borrowed)	43%	49%	50%	40%	33%
	38%	51%	43%	34%	22%
Commercial cottage or cabin rental	41%	35%	41%	42%	46%
	35%	33%	34%	36%	43%
Drive-in lodge or resort	40%	38%	39%	41%	38%
	33% ▼	31%	27%	43%	28%
Designated campground (private or provincial park)	37%	39%	38%	30%	37%
	32%	35%	35%	20% ▼	44%

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

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

Base: all hunters (n=442; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters | Traveller types are defined on slide 10

Past visitors' preferences for the lodging options on this slide are similar to those of hunters overall.

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

Lodging option	Overall (n=442 / 255)	Younger Families (n=110 / 80)	Older Families (n=81 / 44)	Younger Friends (n=107 / 68)	Older Friends (n=100 / 42)
Hotel or motel	35%	35%	35%	35%	29%
	37%	37%	32%	39%	35%
AirBnB	31%	38%	36%	30%	13%
	31%	37%	39%	27%	10%
Fly-in or remote outpost camp	25%	19%	29%	18%	33%
	22%	21%	30%	14%	28%
Home of friends or relatives (unpaid)	20%	29%	19%	16%	21%
	22%	34%	19%	13%	20%

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

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

Base: all hunters (n=442; past visitors n=255). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: PREFERRED ACCESS – MARKET

All hunters

Past visitors' access preferences are similar to those of hunters overall, with road-accessible areas preferred by most.

Within each market, differences between visitors and the market overall are not significant on these items; the Rest of Canada visitor base is small.

Access type	Overall (n=431 / 252)	Rest of Canada* (n=46 / 17)	U.S. Drive (n=297 / 183)	U.S. Fly (n=64 / 30)
Road-accessible areas	83%	81%	86%	74%
	82%	73%	87%	61%
Fly-in or float plane access	42%	35%	44%	41%
	43%	25%	41%	60%
Remote boat-in access	41%	28%	41%	41%
	44%	39%	41%	51%
Train-in access	25%	14%	26%	29%
	28%	11%	27%	42%

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

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

Base: all hunters (n=431; past visitors n=252). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: PREFERRED ACCESS – TRAVELLER TYPE

All hunters | Traveller types are defined on slide 10

DESTINATION ONTARIO

Past visitors' access preferences are similar to those of hunters overall, with road-accessible areas preferred by most.

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

Access type	Overall (n=431 / 252)	Younger Families (n=107 / 79)	Older Families (n=80 / 44)	Younger Friends (n=105 / 66)	Older Friends (n=96 / 42)
Road-accessible areas	83%	82%	82%	86%	82%
	82%	84%	85%	83%	80%
Fly-in or float plane access	42%	46%	45%	39%	40%
	43%	50%	41%	43%	37%
Remote boat-in access	41%	41%	46%	40%	40%
	44%	46%	48%	40%	51%
Train-in access	25%	29%	19%	25%	27%
	28%	33%	24%	25%	25%

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

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

Base: all hunters (n=431; past visitors n=252). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters

Past visitors are less likely than hunters overall to say culinary experiences (28% vs. 37%) and scenic driving (37% vs. 44%) would enhance their trip.

U.S. Drive visitors are less likely than their market overall to choose culinary experiences (23% vs. 33%). The Rest of Canada visitor base is small.

Experience	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Northern Lights or dark sky viewing experiences	46%	40%	48%	39%
	42%	45%	41%	32%
Wildlife viewing separate from hunting or fishing	45%	34%	48%	38%
	42%	47%	43%	31%
Scenic driving or road trip components	44%	32%	46%	46%
	37% ▼	18%	39%	37%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	38%	32%	37%	42%
	32%	38%	30%	32%
Culinary experiences featuring locally sourced or freshly caught / harvested food	37%	43%	33%	51%
	28% ▼	31%	23% ▼	53%

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

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

Base: all hunters (n=445; past visitors n=255). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters

Past visitors' interest in the experiences on this slide is similar to that of hunters overall.

Within each market, differences between visitors and the market overall are not significant on these experiences; the Rest of Canada visitor base is small.

Experience	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Visiting local breweries or distilleries	36%	26%	36%	36%
	36%	14%	34%	45%
Visting local markets, retail and artisans	36%	31%	35%	39%
	32%	17%	30%	31%
All-inclusive lodge packages with guided hunting	31%	24%	29%	37%
	28%	23%	24%	44%
Photography or nature interpretation guided experiences	27%	17%	30%	25%
	27%	25%	27%	30%
Indigenous-led cultural or land-based experiences	25%	30%	26%	20%
	24%	28%	25%	25%

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

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

Base: all hunters (n=445; past visitors n=255). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters

Past visitors' interest in the experiences on this slide is similar to that of hunters overall.

Within each market, differences between visitors and the market overall are not significant on these experiences; the Rest of Canada visitor base is small.

Experience	Overall (n=445 / 255)	Rest of Canada* (n=49 / 18)	U.S. Drive (n=308 / 185)	U.S. Fly (n=64 / 31)
Multi-stop regional itineraries combining several Northern Ontario areas	23%	5%	25%	21%
	27%	9%	25%	26%
Learning and interpretation opportunities	21%	16%	21%	23%
	23%	17%	22%	33%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	20%	10%	21%	19%
	23%	0%	24%	28%
Youth or family-oriented introduction-to-hunting programs	19%	7%	21%	18%
	21%	13%	22%	13%
None – I prefer to focus entirely on the activity	3%	5%	3%	5%
	2%	0%	2%	2%

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

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

Base: all hunters (n=445; past visitors n=255). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters | Traveller types are defined on slide 10

Past visitors are less likely than hunters overall to say culinary experiences (28% vs. 37%) and scenic driving (37% vs. 44%) would enhance their trip.

Older family visitors are much less likely than their group overall to choose culinary experiences (16% vs. 37%).

Experience	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Northern Lights or dark sky viewing experiences	46%	39%	51%	43%	52%
	42%	36%	47%	44%	50%
Wildlife viewing separate from hunting or fishing	45%	42%	42%	41%	51%
	42%	37%	44%	40%	48%
Scenic driving or road trip components	44%	37%	52%	37%	53%
	37% ▼	29%	44%	31%	63%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	38%	37%	40%	41%	35%
	32%	35%	30%	38%	25%
Culinary experiences featuring locally sourced or freshly caught / harvested food	37%	33%	37%	29%	48%
	28% ▼	33%	16% ▼	25%	32%

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

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

Base: all hunters (n=445; past visitors n=255). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters | Traveller types are defined on slide 10

Past visitors' interest in the experiences on this slide is similar to that of hunters overall.

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

Experience	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Visiting local breweries or distilleries	36%	38%	38%	35%	37%
	36%	38%	29%	38%	43%
Visting local markets, retail and artisans	36%	30%	39%	40%	40%
	32%	27%	24%	33%	49%
All-inclusive lodge packages with guided hunting	31%	27%	39%	27%	31%
	28%	29%	34%	30%	20%
Photography or nature interpretation guided experiences	27%	28%	29%	26%	23%
	27%	28%	27%	26%	27%
Indigenous-led cultural or land-based experiences	25%	28%	28%	20%	25%
	24%	30%	23%	21%	20%

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

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

Base: all hunters (n=445; past visitors n=255). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All hunters | Traveller types are defined on slide 10

Past visitors' interest in the experiences on this slide is similar to that of hunters overall.

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

Experience	Overall (n=445 / 255)	Younger Families (n=110 / 80)	Older Families (n=83 / 44)	Younger Friends (n=108 / 68)	Older Friends (n=100 / 42)
Multi-stop regional itineraries combining several Northern Ontario areas	23%	24%	27%	21%	21%
	27%	24%	27%	27%	34%
Learning and interpretation opportunities	21%	24%	18%	25%	15%
	23%	29%	17%	29%	14%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	20%	24%	19%	27%	10%
	23%	23%	24%	30%	13%
Youth or family-oriented introduction-to-hunting programs	19%	34%	23%	16%	11%
	21%	33%	18%	18%	14%
None – I prefer to focus entirely on the activity	3%	1%	0%	5%	3%
	2%	1%	0%	3%	0%

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

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

Base: all hunters (n=445; past visitors n=255). M2 Beyond hunting itself, which of the following additional experiences would enhance your trip? Please select all that apply.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (1 OF 4)

Hunters who provided a response

Past visitors describe Northern Ontario's greatest advantage much as hunters overall do, led by its vast, untouched wilderness.

Within each market, differences between visitors and the market overall are not significant on these themes; the Rest of Canada visitor base is small.

Advantage	Overall (n=374 / 216)	Rest of Canada* (n=39 / 14)	U.S. Drive (n=260 / 158)	U.S. Fly* (n=55 / 27)
Vast, Untouched Wilderness & Nature	44%	45%	44%	41%
	42%	53%	42%	41%
Beautiful Scenery & Landscapes	28%	32%	27%	22%
	28%	38%	26%	26%
Abundance of Lakes, Rivers & Water Access	21%	16%	20%	28%
	22%	13%	23%	19%
Less Crowded / Solitude	17%	25%	16%	22%
	15%	8%	15%	25%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who provided a response (n=374; past visitors n=216). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (2 OF 4)

Hunters who provided a response

Past visitors mention each advantage on this slide at a similar rate to hunters overall.

Within each market, differences between visitors and the market overall are not significant on these themes; the Rest of Canada visitor base is small.

Advantage	Overall (n=374 / 216)	Rest of Canada* (n=39 / 14)	U.S. Drive (n=260 / 158)	U.S. Fly* (n=55 / 27)
Great Fishing Opportunities	12%	2%	15%	12%
	12%	0%	13%	18%
Authenticity & Unique Experience	9%	4%	10%	8%
	10%	0%	12%	8%
Great Hunting Opportunities	7%	3%	7%	13%
	6%	5%	6%	10%
Unfamiliar / Open to Discovering	7%	6%	7%	5%
	6%	13%	6%	3%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who provided a response (n=374; past visitors n=216). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (3 OF 4)

Hunters who provided a response

Past visitors mention each advantage on this slide at a similar rate to hunters overall.

Within each market, differences between visitors and the market overall are not significant on these themes; the Rest of Canada visitor base is small.

Advantage	Overall (n=374 / 216)	Rest of Canada* (n=39 / 14)	U.S. Drive (n=260 / 158)	U.S. Fly* (n=55 / 27)
Proximity / Accessibility from Home	5%	14%	5%	2%
	4%	11%	5%	0%
Wide Range of Outdoor Activities	4%	6%	3%	9%
	5%	11%	4%	6%
Northern Lights	4%	3%	4%	3%
	4%	7%	3%	3%
Friendly Locals & Hospitality	3%	2%	2%	6%
	3%	5%	3%	3%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who provided a response (n=374; past visitors n=216). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (4 OF 4)

Hunters who provided a response

Past visitors mention each advantage on this slide at a similar rate to hunters overall.

Within each market, differences between visitors and the market overall are not significant on these themes; the Rest of Canada visitor base is small.

Advantage	Overall (n=374 / 216)	Rest of Canada* (n=39 / 14)	U.S. Drive (n=260 / 158)	U.S. Fly* (n=55 / 27)
Affordable / Good Value	3%	0%	3%	4%
	2%	0%	1%	6%
Cultural & Indigenous Heritage	2%	0%	1%	3%
	2%	0%	1%	3%
Wildlife Viewing & Biodiversity	2%	2%	2%	4%
	2%	0%	3%	0%
Dark Skies & Stargazing	1%	0%	1%	0%
	0%	0%	0%	0%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who provided a response (n=374; past visitors n=216). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (1 OF 4)

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

Past visitors describe Northern Ontario's greatest advantage much as hunters overall do, led by its vast, untouched wilderness.

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

Advantage	Overall (n=374 / 216)	Younger Families (n=94 / 68)	Older Families (n=73 / 38)	Younger Friends (n=85 / 56)	Older Friends (n=83 / 35)
Vast, Untouched Wilderness & Nature	44%	36%	43%	48%	41%
	42%	31%	48%	46%	44%
Beautiful Scenery & Landscapes	28%	28%	31%	26%	29%
	28%	22%	29%	34%	29%
Abundance of Lakes, Rivers & Water Access	21%	24%	24%	23%	13%
	22%	24%	19%	26%	14%
Less Crowded / Solitude	17%	13%	25%	16%	19%
	15%	11%	14%	14%	17%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who provided a response (n=374; past visitors n=216). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (2 OF 4)

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

Past visitors mention each advantage on this slide at a similar rate to hunters overall.

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

Advantage	Overall (n=374 / 216)	Younger Families (n=94 / 68)	Older Families (n=73 / 38)	Younger Friends (n=85 / 56)	Older Friends (n=83 / 35)
Great Fishing Opportunities	12%	15%	10%	12%	11%
	12%	17%	8%	10%	13%
Authenticity & Unique Experience	9%	12%	9%	7%	8%
	10%	13%	13%	8%	8%
Great Hunting Opportunities	7%	9%	8%	7%	7%
	6%	9%	6%	5%	3%
Unfamiliar / Open to Discovering	7%	6%	5%	4%	14%
	6%	5%	9%	4%	11%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who provided a response (n=374; past visitors n=216). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (3 OF 4)

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

Past visitors mention each advantage on this slide at a similar rate to hunters overall.

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

Advantage	Overall (n=374 / 216)	Younger Families (n=94 / 68)	Older Families (n=73 / 38)	Younger Friends (n=85 / 56)	Older Friends (n=83 / 35)
Proximity / Accessibility from Home	5%	5%	10%	4%	4%
	4%	6%	6%	4%	0%
Wide Range of Outdoor Activities	4%	7%	3%	2%	3%
	5%	8%	3%	1%	5%
Northern Lights	4%	5%	1%	2%	7%
	4%	5%	3%	1%	7%
Friendly Locals & Hospitality	3%	4%	0%	3%	5%
	3%	3%	0%	3%	5%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who provided a response (n=374; past visitors n=216). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (4 OF 4)

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

Past visitors mention each advantage on this slide at a similar rate to hunters overall.

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

Advantage	Overall (n=374 / 216)	Younger Families (n=94 / 68)	Older Families (n=73 / 38)	Younger Friends (n=85 / 56)	Older Friends (n=83 / 35)
Affordable / Good Value	3%	2%	2%	3%	1%
	2%	2%	0%	3%	0%
Cultural & Indigenous Heritage	2%	1%	3%	1%	3%
	2%	1%	0%	1%	3%
Wildlife Viewing & Biodiversity	2%	2%	2%	2%	3%
	2%	1%	3%	1%	3%
Dark Skies & Stargazing	1%	1%	0%	0%	1%
	0%	0%	0%	0%	0%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: hunters who provided a response (n=374; past visitors n=216). 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.
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