CONTEXT IS EVERYTHING

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

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

October 16th, 2026

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

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

50 Carroll Street, Toronto, Ontario

www.crg.ca

CONTEXT IS EVERYTHING

CONTENTS

KEY OBJECTIVES	3
METHODOLOGY	4-11
EXECUTIVE SUMMARY	12-19
MARKET SUMMARY	20-27
TRAVELLER TYPE SUMMARY	28-34
TRAVELLER & AVIDITY	35-51
HOW THEY TRAVEL	52-63
PLANNING & BOOKING	64-82
MOTIVATION & VALUES	83-115
AWARENESS & PERCEPTION	116-126
FUTURE DEMAND & EXPERIENCES	127-144
BARRIERS & COMPETITION	145-162



KEY OBJECTIVES

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

Objectives:
The objectives of this survey are to evaluate:

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



METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:
- 30 to 64 years old
- Participated in motorcycle trips 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 Motorcyclist: The respondents who take motorcycle trips, have a motorcycle license or endorsement (now or in the past 2 years), ride at least once a month during the riding season, and have a high household income (CA: $75K+ / US: $50K+)

Total Sample:
- Avid Motorcyclists: n=416

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

Median Length of Interview:
- 20.7 minutes



REGIONAL SAMPLE SIZE

Regional Sample Size

Total	416
Canada	106
Ontario	36
Quebec	15
Manitoba	27
Alberta	10
British Columbia	18

U.S. Drive	244
Illinois	39
Ohio	45
New York	32
Michigan	26
Wisconsin	18
Minnesota	21
Pennsylvania	30
Indiana	14
New Jersey	19

U.S. Fly	66
California	14
Colorado	27
Texas	25



METHODOLOGY

Survey Language:
The survey was administered in English and French

Margin of Error:
Avid Motorcyclists: ± 4.8%

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 motorcyclist: Aged 30–64, takes motorcycle trips, holds a motorcycle licence or endorsement (now or in the past two years), rides at least once a month during the riding season, 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 motorcycling trip in the past five years (51% of avid motorcyclists, n=211).

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

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

Travel party spend: Total spend by the travel party on the most recent Northern Ontario trip, including accommodation, food and drink, activities, equipment and transportation within the region, and excluding airfare and pre-trip shopping. Shown in Canadian dollars; U.S. responses converted at 1.37.

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

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

AVG: Average (mean) response.

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



REPORT VERSION

All Motorcyclists report (this report)
All avid motorcyclists, n=416

Covers who avid motorcyclists 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 motorcycling segment, including those who have not yet visited Northern Ontario.

Past Visitors report
Avid motorcyclists who have visited Northern Ontario for motorcycling in the past five years, n=211

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 motorcyclists on key measures.

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

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



TRAVELLER TYPE SEGMENTS

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

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

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

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

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

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

Older families are included in Overall but not shown separately because of small sample size.



NORTHERN ONTARIO - REGIONS

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

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

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

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

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





EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – PROFILE & TRIP BEHAVIOUR

ALL AVID MOTORCYCLISTS

Motorcyclists are long-time, committed riders who own their bikes. Half (50%) have been riding for more than 10 years, rising to 67% of older friend groups but only 30% of younger friend groups. Nearly half (48%) were introduced by a family member, while solo riders most often discovered riding on their own (56%). Eight in ten (81%) say motorcycling is central to who they are, and almost all (97%) own their bike. Cruisers (44%), sport bikes (38%) and touring bikes (30%) are the most common. (See slides 36–41, 45, 46, 49)

Club ties vary sharply by traveller type. A third (36%) belong to a motorcycling club or association, rising to 50% of younger friend groups, and falling to 15% of Ontario riders and 10% of solo riders. (See slide 47)

They travel often and far, across a three-season riding window. Riders take an average of 4.3 overnight motorcycling trips a year, lasting 3.9 nights, and are willing to travel 11.2 hours one way. Summer is the peak (77%), but fall (57%) and spring (53%) are also strong. Most are self-directed: 72% ride fully self-guided, rising to 84% of older friend groups, while younger friend groups (42%) are more likely to mix guided and self-guided riding. In the same way, 64% prefer mostly self-guided touring, rising to 80% of older friend groups. (See slides 42, 43, 53, 54, 57, 60–63)

Planning relies on personal networks first, with digital tools close behind. Word of mouth (55%) and internet search (47%) lead, followed by social media content (38%) and official tourism websites (29%). Older friend groups make more use of rally or event calendars (32%), and younger friend groups of social media content (54%), articles or videos (34%) and influencers (33%). Six in ten (59%) are likely to use AI to plan, rising to 80% of U.S. Fly riders. (See slides 67–72, 80)



EXECUTIVE SUMMARY – MOTIVATIONS, VALUES & BARRIERS

ALL AVID MOTORCYCLISTS

Motorcyclists ride for escape and discovery. Escape from everyday stress (68%) and experiencing new places (62%) lead, followed by exploring open roads (57%) and thrill and adventure (53%). Escape is strongest among older friend groups (80%), who are also more likely to ride for camaraderie (49%), while partners are less likely to (13%) and solo riders rarely ride to bond with others (5%). Scenic driving (52%) and Northern Lights viewing (47%) are the strongest add-ons, and rallies or club events appeal to a third (32%). (See slides 84–91)

Environmental responsibility is widely shared, although fewer translate it into purchase decisions. Nearly nine in ten (88%) feel a personal responsibility to protect the places they visit, and supporting local businesses (85%) and conservation (84%) are the leading considerations when choosing a destination. Fewer would pay more for a clear conservation benefit (58%), falling to 24% of solo riders. Seven in ten (69%) say certification is important, falling to 36% of solo riders, and a third (34%) have used a certified route or passport program, falling to 12% of Rest of Canada riders. Rest of Canada riders are also less interested in wildlife conservation (47%) and Indigenous-led experiences (39%). (See slides 81, 82, 110–115)

Weather, cost and road access are the main barriers. Unfavourable weather or season timing (37%) and cost (36%) lead, followed by poor road, trail or water access (32%). Cost rises to 54% among Rest of Canada riders and weather to 46% among older friend groups, while U.S. Drive riders are less likely to say Northern Ontario is too far to drive (13%). About a quarter of U.S. riders cite anti-American sentiment or border-crossing concerns. One in six (17%) say they do not know enough about Northern Ontario's riding opportunities, rising to 30% of solo riders, and more than half (55%) say financial pressures have affected their travel plans. (See slides 146–154)



EXECUTIVE SUMMARY – DESTINATION STRENGTH & FUTURE DEMAND

ALL AVID MOTORCYCLISTS

Northern Ontario's road product is well regarded, but awareness is uneven. Among riders who know the region, 91% rate it 4 or 5 out of 5, and 86% agree it has excellent motorcycle touring roads, with no significant differences by market or traveller type. Awareness varies more: 58% of younger families know a lot about Northern Ontario, against 6% of solo riders, and 39% of U.S. Fly riders have heard of it but know nothing about it. (See slides 117–119, 123, 124)

Road quality and safety drive the decision, while younger riders want a fuller offer. Road quality and safety are the leading decision factors (89% each). Younger friend groups place far more importance on outfitters (70%), events (74%) and Indigenous experiences (77%), while older friend groups place little importance on outfitters (30%). (See slides 131–136)

Advocacy is modest and varies widely. Northern Ontario's Net Promoter Score among riders who know the region is 14, ranging from -14 among Rest of Canada riders to 26 among U.S. Fly riders, and from -28 among solo riders to 45 among younger families. Younger friend groups are the most likely to say Northern Ontario is better than alternatives closer to home (82%), and older friend groups the least likely (47%). (See slides 120–122)

Intent is solid. Two-thirds (67%) are likely to visit in the next two years, falling to 49% of U.S. Fly riders. Seven in ten would make Northern Ontario the only (21%) or primary (48%) destination of a trip. Road-accessible areas are preferred (83%). Hotels or motels are the preferred lodging (62%), rising to 77% of U.S. Fly riders. (See slides 128–130, 137–140)



EXECUTIVE SUMMARY – ESTABLISHED AUDIENCES & FUTURE GROWTH

ALL AVID MOTORCYCLISTS

Motorcycling balances an established base of older friend groups with younger friend groups driving future growth. Older friend groups are the largest part of the market today (34% of the estimated market) and remain central to its volume and riding culture, although their trip frequency in Northern Ontario is generally stable or declining. Younger friend groups are a smaller audience today (23%), but show higher intent and are more likely to be taking more Northern Ontario trips than they were 10 years ago. (See slides 29 and 128, and slide 20 of the Past Visitors report)

Older friend groups are the core of the market: experienced, committed and social. Two-thirds (67%) have been riding for more than 10 years, 86% say motorcycling is central to who they are, and they take 4.8 riding trips a year of 4.3 nights. Among those who know Northern Ontario, 89% rate it 4 or 5 out of 5. Escape (80%) and camaraderie with other riders (49%) motivate them, and scenic driving (64%) and rallies or club events (43%) would enhance their trips. They plan through word of mouth (67%) and rally or event calendars (32%) and prefer hotels (68%). Keeping them engaged means addressing weather (46%), road access (40%) and wildfire (39%) concerns, and using events and club networks to give them reasons to return. (See slides 37, 42, 43, 49, 70, 71, 86, 87, 90, 91, 119, 140, 150)

Younger friend groups are newer, highly engaged riders with strong intent. Three-quarters (75%) are likely to visit in the next two years, and 82% say Northern Ontario is better than alternatives closer to home. Most are newer to the activity (30% riding for more than 10 years), yet half (50%) belong to a club and 49% have used a certified touring route or passport program. Exploring open roads (64%), escape (62%) and bonding (59%) motivate them, Northern Lights viewing (60%) is their top add-on, and they place more importance than riders overall on outfitters or guides (70%), motorcycling events (74%) and Indigenous experiences (77%), with 42% mixing guided and self-guided riding. They lean to hotels (64%) and short-term rentals (58%), and plan through social media content (54%), articles or videos (34%) and influencers (33%), with Instagram (75%) their key platform. (See slides 37, 47, 61, 70–72, 75, 76, 82, 86, 87, 90, 122, 128, 136, 140)



EXECUTIVE SUMMARY – SPEND, YIELD & ECONOMIC POTENTIAL

ALL AVID MOTORCYCLISTS

Motorcycling trips to Northern Ontario are high-value. Travel parties spent an average of $3,187 on their most recent trip, about $790 per visitor over 4.6 nights (roughly $170 per visitor per night), and most (86%) stayed in paid roofed accommodation.

U.S. visitors deliver the highest yield. U.S. Fly riders spend about $860 per visitor and U.S. Drive riders about $850, against about $500 for Ontario riders, who take the shortest trips (3.9 nights; U.S. Fly and Ontario bases are small). The U.S. markets make up 87% of the potential market but 90% of its potential value. Rest of Canada riders stay longest (6.7 nights) but spend the least per night.

Smaller parties spend the most per person; younger friend groups spend the most per trip. Partners spend about $1,370 per visitor (small base) because they travel in pairs, while younger friend groups spend the most per party ($3,500) and are the most likely to use paid lodging (91%). Older friend groups travel in the largest parties (5.4 people) and stay longest (5.8 nights) but spend the least per person (about $430).

Small gains in visitation or length of stay are worth a lot. Every 1,000 additional U.S. Drive riders would bring about $840,000 in visitor spending and 4,200 visitor nights. Each extra night adds about $170 per visitor, which makes the levers to extend stays (better value, more for travel companions to do and better road, trail or water access) economically significant.



SPEND AND LENGTH OF STAY BY MARKET

ALL AVID MOTORCYCLISTS

U.S. riders spend the most per visitor and per night; Ontario riders spend the least per trip and take the shortest trips. Rest of Canada riders stay longest (6.7 nights) but spend the least per night. Several market bases are small.

Measure	Overall	Ontario	Rest of Canada	U.S. Drive	U.S. Fly
Average party spend per trip	$3,187	$1,864*	$2,326	$3,676	$3,526*
Average party size (people)	4.0	3.7	3.1	4.4	4.1
Spend per visitor per trip	$788	$500*	$747	$845	$862*
Average nights	4.6	3.9*	6.7	4.2	4.2*
Spend per visitor per night	$170	$130*	$112	$200	$207*
Stayed in paid roofed lodging	86%	90%*	84%	83%	98%*

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



SPEND AND LENGTH OF STAY BY TRAVELLER TYPE

ALL AVID MOTORCYCLISTS

Younger friend groups spend the most per trip; older friend groups spend the least per person. Solo riders and partners spend more per person because they travel in smaller parties (small bases).

Measure	Overall	Solo	Partners	Younger families	Younger friends	Older friends
Average party spend per trip	$3,187	$1,988*	$2,732*	$3,126	$3,500	$2,294
Average party size (people)	4.0	1.0	2.0	5.3	4.3	5.4
Spend per visitor per trip	$788	$1,988*	$1,366*	$591	$807	$425
Average nights	4.6	3.5*	3.5*	4.4	4.2	5.8
Spend per visitor per night	$170	$563*	$392*	$135	$192	$73
Stayed in paid roofed lodging	86%	83%*	80%*	83%	91%	82%

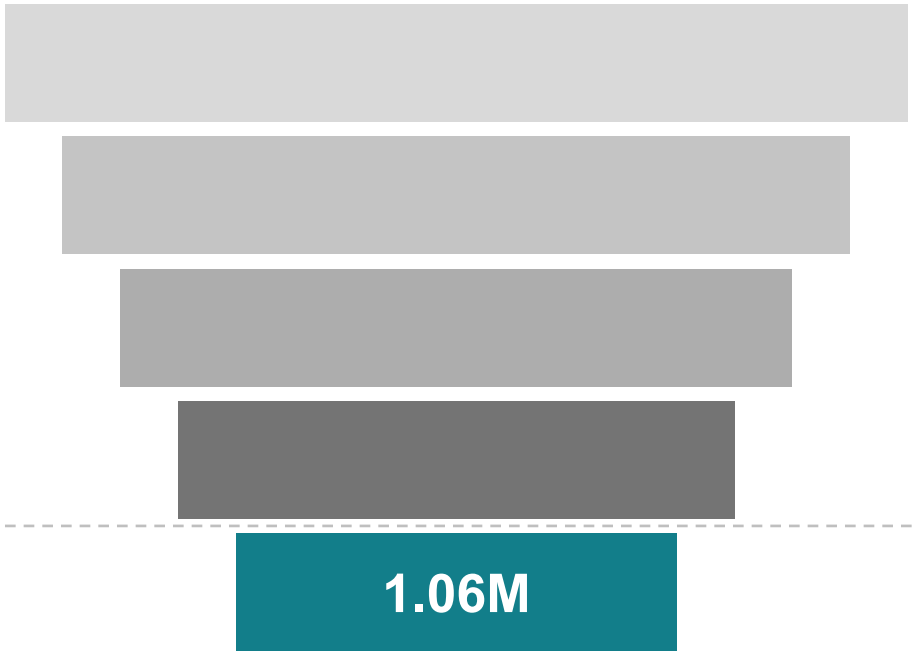
Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than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



MARKET SUMMARY

HOW THE OPPORTUNITY POOL IS BUILT: AVID MOTORCYCLISTS

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



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

Motorcyclists
Residents who ride a registered motorcycle.

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

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

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

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

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

ESTIMATED NORTHERN ONTARIO OPPORTUNITY POOL: AVID MOTORCYCLISTS

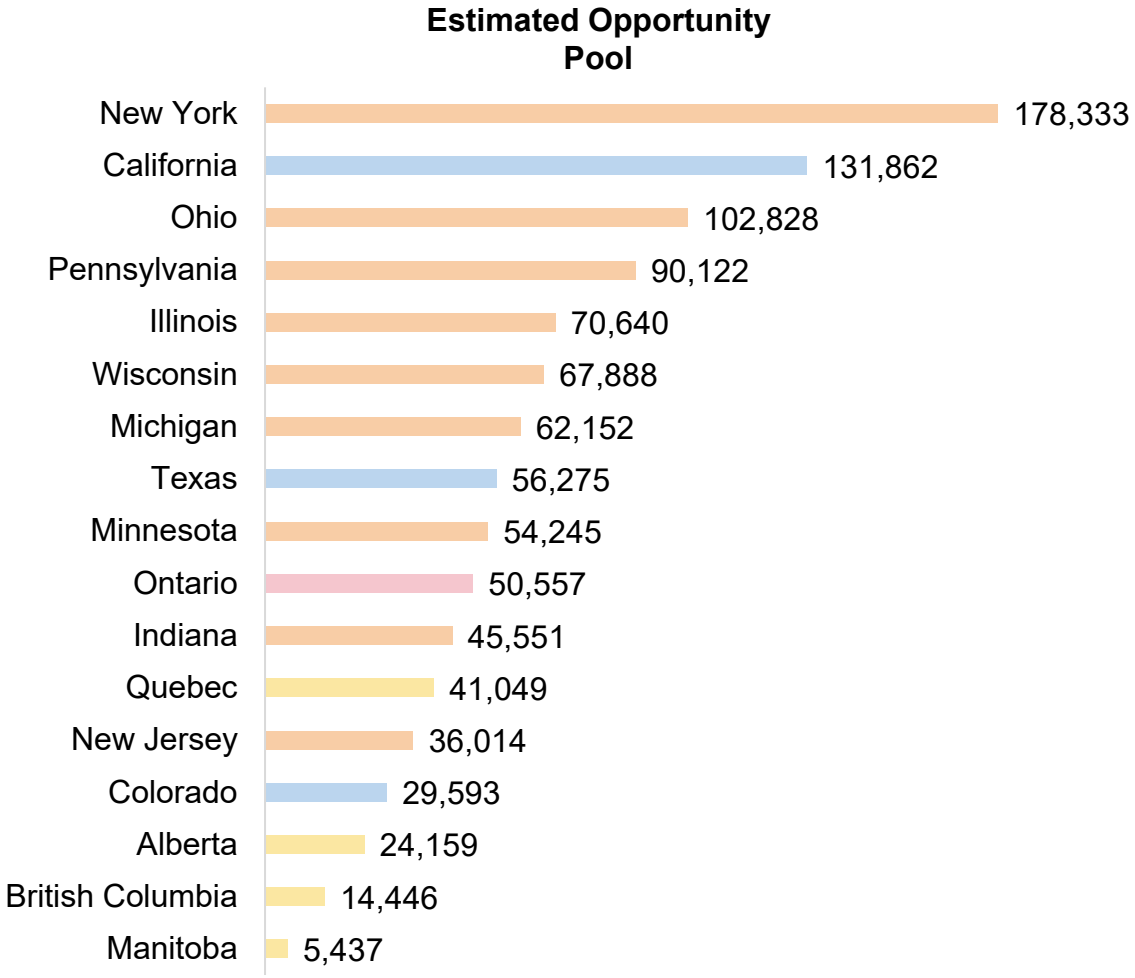
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO
50,557

Rest of Canada
85,092

U.S. Drive
707,772

U.S. Fly
217,730



Avid motorcyclists aged 30–64 in the surveyed markets who told us they intend to take a motorcycling trip to Northern Ontario in the next two years. Not a forecast of visitors. All markets: 1,061,151.

INCREMENTAL VISITOR SPEND: AVID MOTORCYCLISTS

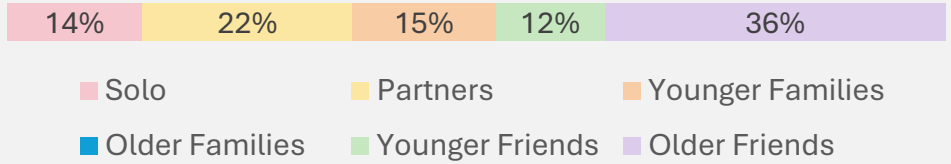
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO **50,557** Opportunity pool	**1,000** additional visitors	×	**$500** spend per visitor*	=	**$500K** incremental visitor spend
Rest of Canada **85,092** Opportunity pool	**1,000** additional visitors	×	**$747** spend per visitor	=	**$747K** incremental visitor spend
U.S. Drive **707,772** Opportunity pool	**1,000** additional visitors	×	**$845** spend per visitor	=	**$845K** incremental visitor spend
U.S. Fly **217,730** Opportunity pool	**1,000** additional visitors	×	**$862** spend per visitor*	=	**$862K** incremental visitor spend

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

ONTARIO – MOTORCYCLING

ESTIMATED OPPORTUNITY POOL: 50,557



HOW THEY TRAVEL

- Ontario riders are frequent visitors, but their trips are the shortest and lowest-spending of any market.
- 70% have ridden in Northern Ontario in the past five years, averaging 1.9 trips.
- Their most recent trip lasted 3.9 nights at $1,864 per party, and 90% stayed in paid roofed lodging (small base).
- Hotels or motels (65%) and short-term rentals (63%) are the preferred lodging options.
- Northeast Ontario (40%) and The Great Canadian Wilderness (39%) are the most visited regions, and summer (89%) and fall (56%) the preferred seasons. (See slides 53, 139, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Thrill and adventure (67%) and escape from everyday stress (61%) are the leading motivations.
- Experiencing new places follows (58%).
- Scenic driving (59%) and culinary experiences (56%) are the strongest add-on experiences. (See slides 84–85, 88)

WHAT THEY VALUE

- Supporting local businesses (88%) and conservation (80%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (57%) and paying more for a clear conservation benefit (46%) compare with 64% and 58% for the segment.
- 64% say a recognized certification or designation is important. (See slides 81, 110, 113)

WHAT HOLDS THEM BACK

- Limited accommodation (43%), poor road, trail or water access (42%) and cost (41%) are the leading barriers.
- 80% say financial pressures have affected their travel plans. (See slides 146–147, 154)

WHAT WOULD GROW THEM

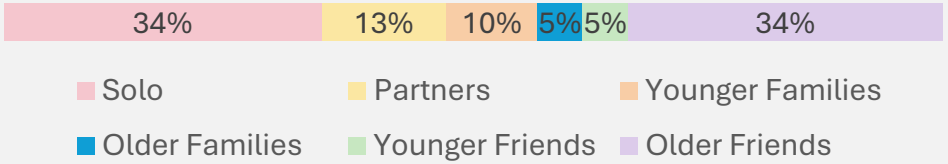
- Better connectivity (35%), better value (35%) and Indigenous cultural experiences (31%) would most encourage longer stays (small base).
- 75% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 6 (segment 14). (See slides 120, 128, 141–142)

WHERE TO REACH THEM

- Word of mouth (66%), official tourism websites (49%) and general search (29%) are the leading planning sources.
- Among social media users, YouTube (89%), Facebook (59%) and Instagram (53%) lead (small base).
- 46% are likely to use AI tools to plan their next trip. (See slides 67, 73, 80)

REST OF CANADA – MOTORCYCLING

ESTIMATED OPPORTUNITY POOL: 85,092



HOW THEY TRAVEL

- Rest of Canada riders take the longest trips and are the most sensitive to cost and wildfires.
- 57% have ridden in Northern Ontario in the past five years, averaging 1.5 trips.
- Their most recent trip lasted 6.7 nights at $2,326 per party, and 84% stayed in paid roofed lodging.
- Hotels or motels (53%) and commercial cottages or cabins (48%) are the preferred lodging options.
- Algoma Country (35%) and Sunset Country (29%) are the most visited regions, and summer (80%) and spring (39%) the preferred seasons. (See slides 53, 139, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Escape from everyday stress (73%) and exploring open roads, trails or waterways (51%) are the leading motivations.
- Solitude and reflection follows (50%).
- Culinary experiences (52%) and scenic driving (49%) are the strongest add-on experiences. (See slides 84–85, 88)

WHAT THEY VALUE

- Conservation (85%) and supporting local businesses (85%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (51%) and paying more for a clear conservation benefit (50%) compare with 64% and 58% for the segment.
- 58% say a recognized certification or designation is important. (See slides 81, 110, 113)

WHAT HOLDS THEM BACK

- Cost (54%), wildfires and other disruptions (52%) and weather or season timing (41%) are the leading barriers.
- 64% say financial pressures have affected their travel plans. (See slides 146, 154)

WHAT WOULD GROW THEM

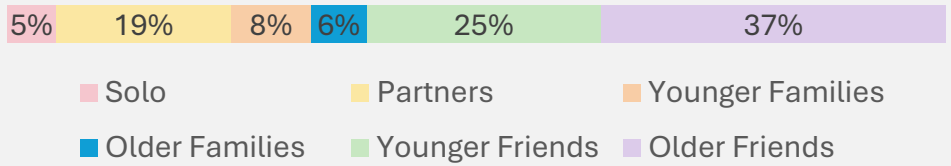
- Better value (55%), more for travel companions to do (33%) and events timed to their travel (31%) would most encourage longer stays.
- 61% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is -14 (segment 14). (See slides 120, 128, 141)

WHERE TO REACH THEM

- Word of mouth (55%), general search (49%) and official tourism websites (33%) are the leading planning sources.
- Among social media users, Facebook (73%), Instagram (66%) and Reddit (23%) lead (small base).
- 42% are likely to use AI tools to plan their next trip. (See slides 67, 73, 80)

U.S. DRIVE – MOTORCYCLING

ESTIMATED OPPORTUNITY POOL: 707,772



HOW THEY TRAVEL

- U.S. Drive riders are the largest market and the best conversion prospect.
- 50% have ridden in Northern Ontario in the past five years, averaging 1.6 trips.
- Their most recent trip lasted 4.2 nights at $3,676 per party, and 83% stayed in paid roofed lodging.
- Hotels or motels (60%) and short-term rentals (40%) are the preferred lodging options.
- Algoma Country (21%) and Northeast Ontario (21%) are the most visited regions, and summer (77%) and fall (61%) the preferred seasons. (See slides 53, 139, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Escape from everyday stress (67%) and experiencing new places (63%) are the leading motivations.
- Exploring open roads, trails or waterways follows (61%).
- Scenic driving (54%) and Northern Lights viewing (50%) are the strongest add-on experiences. (See slides 84–85, 88)

WHAT THEY VALUE

- Conservation (85%) and supporting local businesses (85%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (67%) and paying more for a clear conservation benefit (61%) compare with 64% and 58% for the segment.
- 74% say a recognized certification or designation is important. (See slides 81, 110, 113)

WHAT HOLDS THEM BACK

- Weather or season timing (37%), poor road, trail or water access (35%) and cost (30%) are the leading barriers.
- Distance is less of a concern (13% vs. 20%).
- 46% say financial pressures have affected their travel plans. (See slides 146, 148, 154)

WHAT WOULD GROW THEM

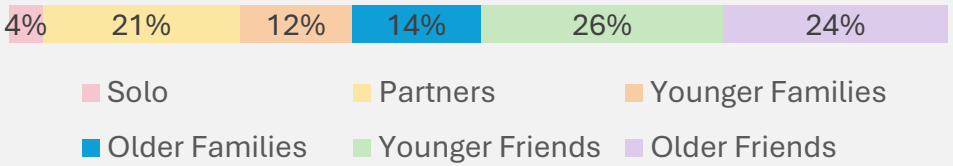
- Better value (37%), improved access infrastructure (35%) and secure storage (33%) would most encourage longer stays.
- 72% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 21 (segment 14). (See slides 120, 128, 141)

WHERE TO REACH THEM

- Word of mouth (55%), general search (49%) and social media content (41%) are the leading planning sources.
- Among social media users, YouTube (77%), Facebook (72%) and Instagram (54%) lead.
- 61% are likely to use AI tools to plan their next trip. (See slides 67, 73, 80)

U.S. FLY – MOTORCYCLING

ESTIMATED OPPORTUNITY POOL: 217,730



HOW THEY TRAVEL

- U.S. Fly riders are the least engaged market, with the lowest visitation and intent to visit.
- 36% have ridden in Northern Ontario in the past five years, averaging 1.1 trips.
- Their most recent trip lasted 4.2 nights at $3,526 per party, and 98% stayed in paid roofed lodging (small base).
- Hotels or motels (77%) and short-term rentals (49%) are the preferred lodging options.
- Sunset Country (21%) and The Great Canadian Wilderness (18%) are the most visited regions, and summer (72%) and spring (62%) the preferred seasons. (See slides 53, 139, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Escape from everyday stress (72%) and experiencing new places (71%) are the leading motivations.
- Thrill and adventure follows (60%).
- Scenic driving (47%) and Northern Lights viewing (47%) are the strongest add-on experiences. (See slides 84–85, 88)

WHAT THEY VALUE

- Minimal environmental impact (87%) and supporting local businesses (84%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (69%) and paying more for a clear conservation benefit (61%) compare with 64% and 58% for the segment.
- 64% say a recognized certification or designation is important. (See slides 81, 110, 113)

WHAT HOLDS THEM BACK

- Cost (37%), distance (35%) and weather or season timing (35%) are the leading barriers.
- 63% say financial pressures have affected their travel plans. (See slides 146, 148, 154)

WHAT WOULD GROW THEM

- Better value (44%), secure storage (39%) and quality paid accommodation (37%) would most encourage longer stays (small base).
- 49% are likely to visit in the next two years (the lowest of any market).
- Among those who know the region, Northern Ontario's NPS is 26 (segment 14). (See slides 120, 128, 141)

WHERE TO REACH THEM

- Social media content (55%), word of mouth (51%) and general search (50%) are the leading planning sources.
- Among social media users, YouTube (82%), Facebook (81%) and Instagram (67%) lead.
- 80% are likely to use AI tools to plan their next trip (the highest of any market). (See slides 67, 73, 80)



TRAVELLER TYPE SUMMARY

ESTIMATED OPPORTUNITY POOL BY TRAVELLER TYPE: AVID MOTORCYCLISTS

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

SOLO
80,610

YOUNGER FAMILIES
101,688

YOUNGER FRIENDS
242,880

PARTNERS
200,730

OLDER FAMILIES
76,585

OLDER FRIENDS
358,658

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

SOLO – MOTORCYCLING

ESTIMATED OPPORTUNITY POOL: 80,610

WHO THEY ARE
- Solo riders are independent and less connected to clubs and established riding networks.
- 36% have children under 18 at home, and the largest age group is 35 to 44 (39%).
- 55% have been motorcycling for more than 10 years, and 66% say it is central to who they are.
- 10% belong to a club or association (the lowest of any traveller type). (See slides 37, 47, 49)

HOW THEY TRAVEL
- 58% have ridden in Northern Ontario in the past five years, averaging 1.4 trips.
- Their most recent trip lasted 3.5 nights at $1,988 per party, and 83% stayed in paid roofed lodging (small base).
- Hotels or motels (44%) and designated campgrounds (39%) are the preferred lodging options.
- Algoma Country (23%) and The Great Canadian Wilderness (22%) are the most visited regions, and summer (82%) and spring (37%) the preferred seasons. (See slides 54, 140, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Experiencing new places (58%) and escape from everyday stress (56%) are the leading motivations.
- Bonding with friends or family matters less than in the segment overall (5% vs. 48%).
- Scenic driving (41%) and wildlife viewing (36%) are the strongest add-on experiences. (See slides 86, 90)

WHAT THEY VALUE
- Conservation (82%) and minimal environmental impact (79%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (29%) and paying more for a clear conservation benefit (24%) are lower than in the segment.
- 36% say a recognized certification or designation is important (the lowest of any traveller type). (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Cost (50%), wildfires and other disruptions (41%) and weather or season timing (41%) are the leading barriers.
- 63% say financial pressures have affected their travel plans. (See slides 150, 154)

WHAT WOULD GROW THEM
- Better value (51%), more accommodation availability (37%) and improved access infrastructure (20%) would most encourage longer stays (small base).
- 75% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is -28 (segment 14). (See slides 120, 128, 143)

WHERE TO REACH THEM
- General search (54%), booking or review sites (25%) and social media content (24%) are the leading planning sources.
- Among social media users, Facebook (81%), Instagram (41%) and Reddit (40%) lead (small base).
- 39% are likely to use AI tools to plan their next trip. (See slides 70, 75, 80)

PARTNERS – MOTORCYCLING

ESTIMATED OPPORTUNITY POOL: 200,730

WHO THEY ARE
- Partners are among the least frequent visitors and the most likely to treat riding as a secondary trip activity.
- 56% have children under 18 at home, and the largest age group is 45 to 54 (39%).
- 47% have been motorcycling for more than 10 years, and 72% say it is central to who they are.
- 25% belong to a club or association. (See slides 37, 47, 49)

HOW THEY TRAVEL
- 38% have ridden in Northern Ontario in the past five years, averaging 1.0 trips.
- Their most recent trip lasted 3.5 nights at $2,732 per party, and 80% stayed in paid roofed lodging (small base).
- Hotels or motels (57%) and commercial cottages or cabins (44%) are the preferred lodging options.
- Northeast Ontario (17%) and Sunset Country (16%) are the most visited regions, and summer (75%) and fall (64%) the preferred seasons. (See slides 54, 140, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Escape from everyday stress (71%) and experiencing new places (66%) are the leading motivations.
- Camaraderie with fellow enthusiasts matters less than in the segment overall (13% vs. 32%).
- Scenic driving (54%) and Northern Lights viewing (51%) are the strongest add-on experiences. (See slides 86, 90)

WHAT THEY VALUE
- Conservation (84%) and supporting local businesses (84%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (63%) and paying more for a clear conservation benefit (49%) compare with 64% and 58% for the segment.
- 66% say a recognized certification or designation is important. (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Cost (39%), poor road, trail or water access (37%) and weather or season timing (35%) are the leading barriers.
- 48% say financial pressures have affected their travel plans. (See slides 150, 154)

WHAT WOULD GROW THEM
- Better value (39%), quality paid accommodation (34%) and secure storage (30%) would most encourage longer stays (small base).
- 58% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 17 (segment 14). (See slides 120, 128, 143)

WHERE TO REACH THEM
- Word of mouth (67%), general search (49%) and social media content (38%) are the leading planning sources.
- Among social media users, Facebook (75%), YouTube (68%) and TikTok (58%) lead.
- 46% are likely to use AI tools to plan their next trip. (See slides 70, 75, 80)

YOUNGER FAMILIES – MOTORCYCLING

ESTIMATED OPPORTUNITY POOL: 101,688

WHO THEY ARE
- Younger families are the growth audience, with the highest visitation and intent to visit.
- 90% have children under 18 at home, and the largest age group is 35 to 44 (74%).
- 23% have been motorcycling for more than 10 years (the lowest of any traveller type), and 96% say it is central to who they are.
- 63% belong to a club or association (the highest of any traveller type). (See slides 37, 47, 49)

HOW THEY TRAVEL
- 81% have ridden in Northern Ontario in the past five years (the highest of any traveller type), averaging 2.8 trips.
- Their most recent trip lasted 4.4 nights at $3,126 per party, and 83% stayed in paid roofed lodging.
- Hotels or motels (61%) and backcountry camping (38%) are the preferred lodging options.
- The Great Canadian Wilderness (47%) and Sunset Country (46%) are the most visited regions, and summer (77%) and spring (67%) the preferred seasons. (See slides 54, 140, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Thrill and adventure (53%) and escape from everyday stress (49%) are the leading motivations.
- Physical fitness and health matters more than in the segment overall (48% vs. 20%).
- Rallies, races or club events (47%) and Northern Lights viewing (45%) are the strongest add-on experiences. (See slides 86, 90)

WHAT THEY VALUE
- Supporting local businesses (90%) and community benefit (88%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (84%) and paying more for a clear conservation benefit (84%) are higher than in the segment.
- 87% say a recognized certification or designation is important (the highest of any traveller type). (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Cost (34%), unclear regulations (26%) and weather or season timing (24%) are the leading barriers.
- 61% say financial pressures have affected their travel plans. (See slides 150–151, 154)

WHAT WOULD GROW THEM
- Better value (52%), more for travel companions to do (41%) and secure storage (37%) would most encourage longer stays.
- 86% are likely to visit in the next two years (the highest of any traveller type).
- Among those who know the region, Northern Ontario's NPS is 45 (segment 14). (See slides 120, 128, 143)

WHERE TO REACH THEM
- General search (42%), AI tools (40%) and social media content (39%) are the leading planning sources.
- Travel agents play a bigger role than for the segment (25% vs. 7%).
- Among social media users, YouTube (90%), Instagram (76%) and Facebook (71%) lead (small base).
- 86% are likely to use AI tools to plan their next trip (the highest of any traveller type). (See slides 70–72, 75, 80)

YOUNGER FRIENDS – MOTORCYCLING

ESTIMATED OPPORTUNITY POOL: 242,880

WHO THEY ARE
- Younger friend groups are newer riders with strong intent to return.
- 75% have children under 18 at home, and the largest age group is 35 to 44 (72%).
- 30% have been motorcycling for more than 10 years (below the segment's 50%), and 83% say it is central to who they are.
- 50% belong to a club or association (above the segment's 36%). (See slides 37, 47, 49)

HOW THEY TRAVEL
- 59% have ridden in Northern Ontario in the past five years, averaging 2.1 trips.
- Their most recent trip lasted 4.2 nights at $3,500 per party, and 91% stayed in paid roofed lodging.
- Hotels or motels (64%) and short-term rentals (58%) are the preferred lodging options.
- Superior Country (25%) and Northeast Ontario (25%) are the most visited regions, and summer (81%) and spring (64%) the preferred seasons. (See slides 54, 140, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Exploring open roads, trails or waterways (64%) and escape from everyday stress (62%) are the leading motivations.
- Bonding with friends or family follows (59%).
- Northern Lights viewing (60%) and scenic driving (49%) are the strongest add-on experiences. (See slides 86–87, 90)

WHAT THEY VALUE
- Supporting local businesses (87%) and community benefit (85%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (74%) and paying more for a clear conservation benefit (71%) are higher than in the segment.
- 78% say a recognized certification or designation is important. (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Weather or season timing (36%), safety concerns (33%) and cost (33%) are the leading barriers.
- 55% say financial pressures have affected their travel plans. (See slides 150–151, 154)

WHAT WOULD GROW THEM
- Better value (45%), quality paid accommodation (44%) and improved access infrastructure (43%) would most encourage longer stays.
- 75% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 18 (segment 14). (See slides 120, 128, 143)

WHERE TO REACH THEM
- Word of mouth (55%), social media content (54%) and general search (41%) are the leading planning sources.
- Influencers play a bigger role than for the segment (33% vs. 19%).
- Among social media users, YouTube (82%), Instagram (75%) and Facebook (69%) lead.
- 69% are likely to use AI tools to plan their next trip. (See slides 70–72, 75, 80)

OLDER FRIENDS – MOTORCYCLING

ESTIMATED OPPORTUNITY POOL: 358,658

WHO THEY ARE
- Older friend groups are the largest and most experienced traveller type, but among the least likely to have visited recently.
- 36% have children under 18 at home, and the largest age group is 45 to 54 (54%).
- 67% have been motorcycling for more than 10 years (the highest of any traveller type), and 86% say it is central to who they are.
- 33% belong to a club or association. (See slides 37, 47, 49)

HOW THEY TRAVEL
- 38% have ridden in Northern Ontario in the past five years (below the segment's 51%), averaging 0.9 trips.
- Their most recent trip lasted 5.8 nights at $2,294 per party, and 82% stayed in paid roofed lodging.
- Hotels or motels (68%) and short-term rentals (47%) are the preferred lodging options.
- Algoma Country (20%) and Superior Country (17%) are the most visited regions, and summer (79%) and fall (58%) the preferred seasons. (See slides 54, 140, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Escape from everyday stress (80%) and experiencing new places (69%) are the leading motivations.
- Camaraderie with fellow enthusiasts matters more than in the segment overall (49% vs. 32%).
- Scenic driving (64%) and rallies, races or club events (43%) are the strongest add-on experiences. (See slides 86, 90)

WHAT THEY VALUE
- Community benefit (87%) and supporting local businesses (86%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (58%) and paying more for a clear conservation benefit (54%) compare with 64% and 58% for the segment.
- 68% say a recognized certification or designation is important. (See slides 81, 111, 115)

WHAT HOLDS THEM BACK
- Weather or season timing (46%), poor road, trail or water access (40%) and wildfires and other disruptions (39%) are the leading barriers.
- 51% say financial pressures have affected their travel plans. (See slides 150, 154)

WHAT WOULD GROW THEM
- Events timed to their travel (33%), more for travel companions to do (31%) and better value (28%) would most encourage longer stays.
- 58% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 4 (segment 14). (See slides 120, 128, 143)

WHERE TO REACH THEM
- Word of mouth (67%), general search (52%) and official tourism websites (33%) are the leading planning sources.
- Rally or event calendars play a bigger role than for the segment (32% vs. 20%).
- Among social media users, Facebook (75%), YouTube (72%) and TikTok (42%) lead.
- 55% are likely to use AI tools to plan their next trip. (See slides 70–72, 75, 80)



TRAVELLER & AVIDITY

YEARS MOTORCYCLING – MARKET

All motorcyclists

Half of motorcyclists (50%) have been motorcycling for more than 10 years, and about a quarter each for 6 to 10 years (23%) or 2 to 5 years (23%). Few (4%) have been motorcycling for less than 2 years.

Tenure is similar across markets, with more than 10 years ranging from 49% among Ontario, U.S. Drive and U.S. Fly motorcyclists to 54% among Rest of Canada motorcyclists.

Years motorcycling	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Less than 2 years	4%	0%	4%	3%	11%
2 to 5 years	23%	28%	22%	21%	27%
6 to 10 years	23%	23%	19%	27%	13%
More than 10 years	50%	49%	54%	49%	49%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). A1 How many years have you been motorcycling as a hobby or recreational pursuit?

YEARS MOTORCYCLING – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Older friend groups are more likely than other traveller types to have been motorcycling for more than 10 years (67%), while younger families (23%) and younger friend groups (30%) are less likely.

Younger families are more likely to have been motorcycling for 2 to 5 years (47%).

Years motorcycling	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Less than 2 years	4%	0%	11%	4%	6%	1%
2 to 5 years	23%	18%	21%	47% ▲	34%	13%
6 to 10 years	23%	26%	22%	25%	31%	18%
More than 10 years	50%	55%	47%	23% ▼	30% ▼	67% ▲

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

Base: all motorcyclists (n=416). A1 How many years have you been motorcycling as a hobby or recreational pursuit?

MOTORCYCLE USED MOST OFTEN – MARKET

All motorcyclists

Cruisers (44%) are the most common motorcycles used for motorcycling trips, followed by sport bikes (38%), touring bikes or dressers (30%) and adventure or dual-sport bikes (20%).

Cruiser use ranges from 26% among Rest of Canada motorcyclists to 51% among U.S. Drive motorcyclists. None of the market differences are significant.

Motorcycle	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Cruiser	44%	47%	26%	51%	37%
Sport bike	38%	36%	24%	39%	47%
Touring / dresser	30%	21%	35%	32%	23%
Adventure / dual-sport	20%	15%	19%	20%	23%
Standard / naked	13%	14%	11%	10%	23%
Trike or side-car equipped	7%	2%	5%	8%	10%
Other	1%	2%	2%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). A2 Which of the following best describes the motorcycle you most often use for motorcycling trips? Please select all that apply.

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

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

MOTORCYCLE USED MOST OFTEN – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to ride sport bikes (67%), adventure or dual-sport bikes (51%) and standard or naked bikes (31%).

Younger friend groups are also more likely to ride sport bikes (55%). Cruisers are most common among solo riders (59%).

Motorcycle	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Cruiser	44%	59%	48%	47%	52%	32%
Sport bike	38%	27%	29%	67% ▲	55% ▲	29%
Touring / dresser	30%	15%	24%	36%	28%	37%
Adventure / dual-sport	20%	10%	13%	51% ▲	23%	12%
Standard / naked	13%	13%	5%	31% ▲	13%	12%
Trike or side-car equipped	7%	0%	11%	17%	4%	5%
Other	1%	0%	1%	3%	1%	1%

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

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

Base: all motorcyclists (n=416). A2 Which of the following best describes the motorcycle you most often use for motorcycling trips? Please select all that apply.

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

MOTORCYCLE OWNERSHIP – MARKET

All motorcyclists

Almost all motorcyclists (97%) own their motorcycle.

Ownership is 94% or higher in every market.

Ownership	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Own	97%	94%	100%	96%	96%
Lease	1%	0%	0%	2%	0%
Rent or borrow when needed	2%	4%	0%	2%	4%
Other	<1%	3%	0%	<1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). A2B Do you own, lease, or rent your motorcycle?

MOTORCYCLE OWNERSHIP – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Ownership is 94% or higher for every traveller type.

Few motorcyclists in any traveller type lease or rent their motorcycle.

Ownership	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Own	97%	96%	99%	97%	94%	97%
Lease	1%	2%	0%	0%	2%	1%
Rent or borrow when needed	2%	2%	1%	3%	2%	2%
Other	<1%	0%	0%	0%	2%	0%

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

Base: all motorcyclists (n=416). A2B Do you own, lease, or rent your motorcycle?

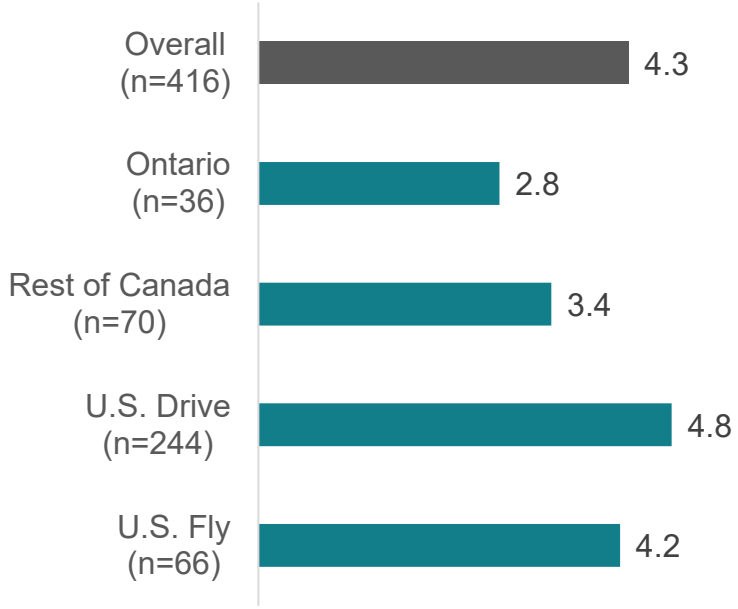
MOTORCYCLING TRIPS PER YEAR

All motorcyclists | Traveller types are defined on slide 10

Motorcyclists take an average of 4.3 overnight trips per year where motorcycling is the primary purpose.

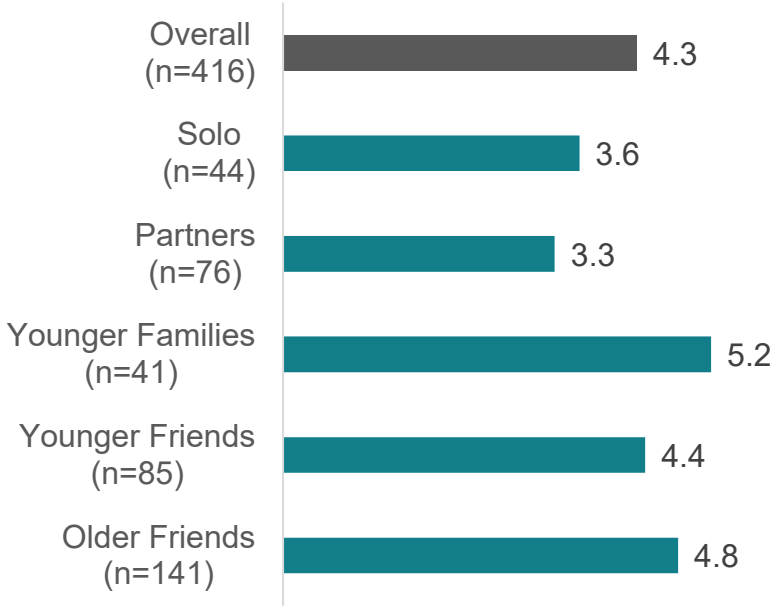
Averages range from 2.8 trips among Ontario motorcyclists to 4.8 among U.S. Drive motorcyclists, and from 3.3 among partners to 5.2 among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists (n=416). A3 Approximately how many overnight trips per year do you take where motorcycling is the primary purpose?
AVG = average number of overnight trips per year.

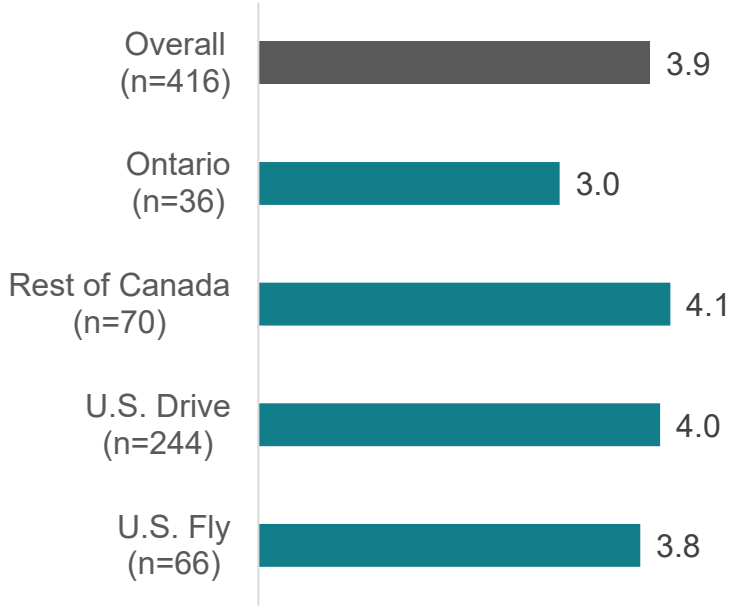
NIGHTS PER MOTORCYCLING TRIP

All motorcyclists | Traveller types are defined on slide 10

Motorcycling trips last an average of 3.9 nights.

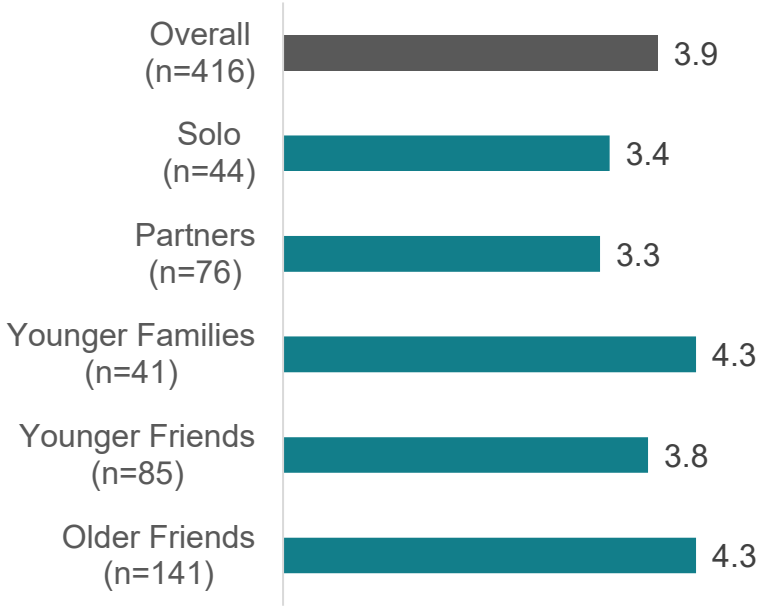
Trip length ranges from 3.0 nights among Ontario motorcyclists to 4.1 among Rest of Canada motorcyclists, and from 3.3 nights among partners to 4.3 among younger families and older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists (n=416). A4 How many nights do you typically spend on a motorcycling trip? AVG = average number of nights.

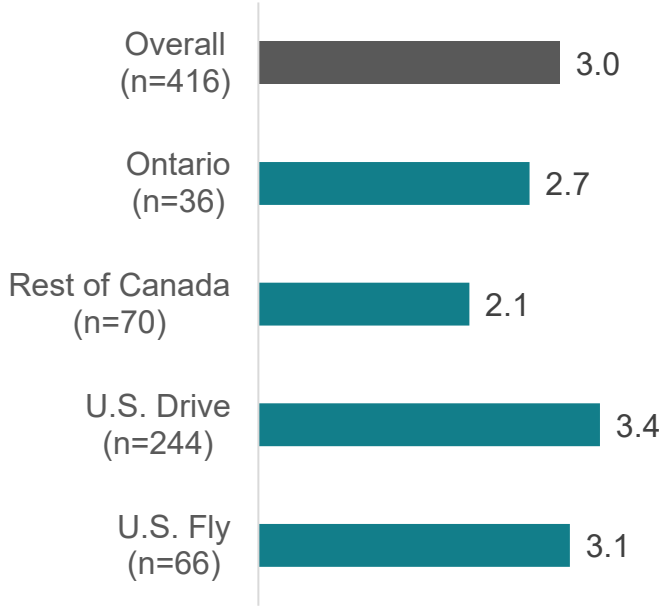
NUMBER OF PEOPLE TRAVELLED WITH ON MOTORCYCLING TRIPS

All motorcyclists | Traveller types are defined on slide 10

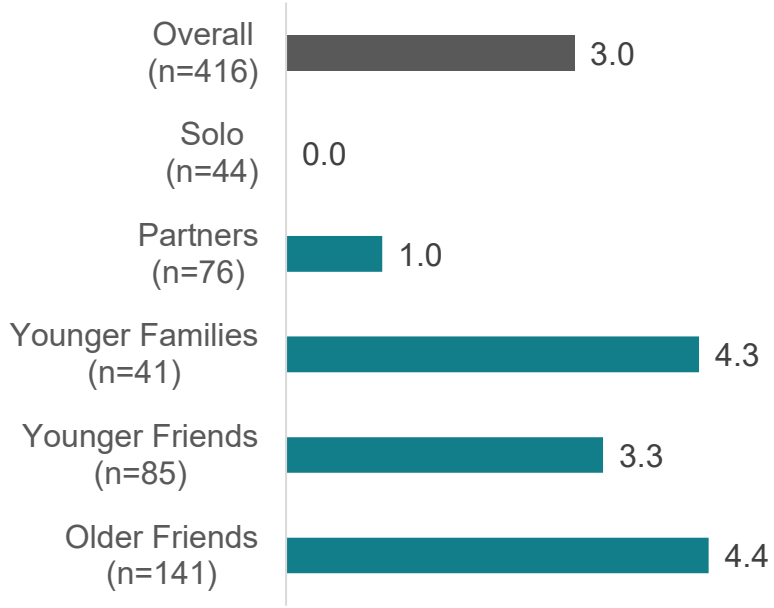
Motorcyclists typically travel with an average of 3.0 people on a motorcycling trip.

Older friend groups (4.4) and younger families (4.3) travel in the largest groups, while partners average 1.0 people, consistent with travelling as a couple, and solo riders travel alone. Among markets, group size ranges from 2.1 among Rest of Canada motorcyclists to 3.4 among U.S. Drive motorcyclists.

MARKET



TRAVELLER TYPE



Base: all motorcyclists (n=416). A5 How many people do you typically travel with on a motorcycling trip? AVG = sum of the average number of people reported for each category (partner or spouse, friends, children, other). Significance testing is not available for the combined average.

FIRST EXPOSURE TO MOTORCYCLING – MARKET

All motorcyclists

Half of motorcyclists (48%) got their first exposure to motorcycling through a family member, and about a quarter through friends or peers (28%) or on their own (21%).

Exposure through family ranges from 32% among Rest of Canada motorcyclists to 52% among U.S. Drive motorcyclists, with no significant market differences.

First exposure	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
A family member	48%	50%	32%	52%	46%
School, camp, or organized program	3%	5%	8%	1%	5%
Friends or peers	28%	26%	25%	28%	29%
I discovered it on my own	21%	19%	33%	18%	19%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). A9 Where did you get your first exposure to motorcycling?
"Not sure" (1%) not shown.

FIRST EXPOSURE TO MOTORCYCLING – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Solo riders are more likely than other traveller types to have discovered motorcycling on their own (56%), and younger families to have been introduced through school, camp or an organized program (24%).

Partners are the most likely to have been introduced by a family member (60%).

First exposure	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
A family member	48%	34%	60%	44%	44%	49%
School, camp, or organized program	3%	0%	1%	24% ▲	1%	1%
Friends or peers	28%	11%	22%	18%	40%	34%
I discovered it on my own	21%	56% ▲	17%	14%	14%	16%

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

Base: all motorcyclists (n=416). A9 Where did you get your first exposure to motorcycling? "Not sure" (1%) not shown.

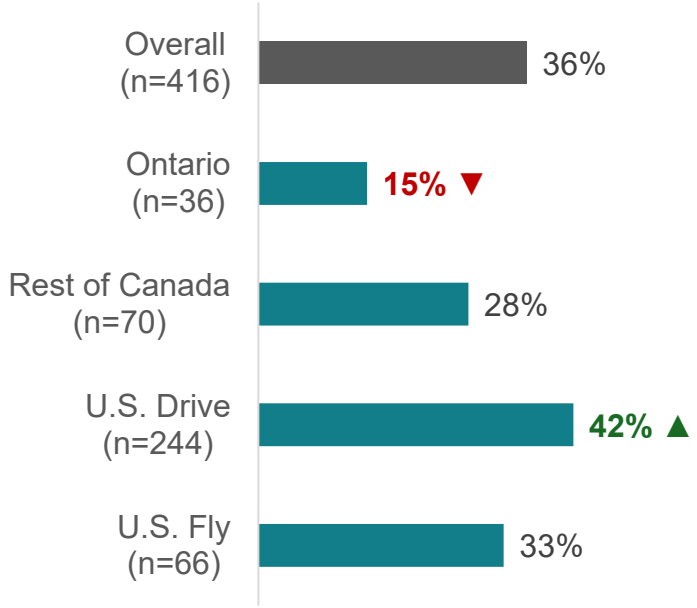
CLUB OR ASSOCIATION MEMBERSHIP

All motorcyclists | Traveller types are defined on slide 10

More than a third of motorcyclists (36%) are members of a motorcycling-related club or association.

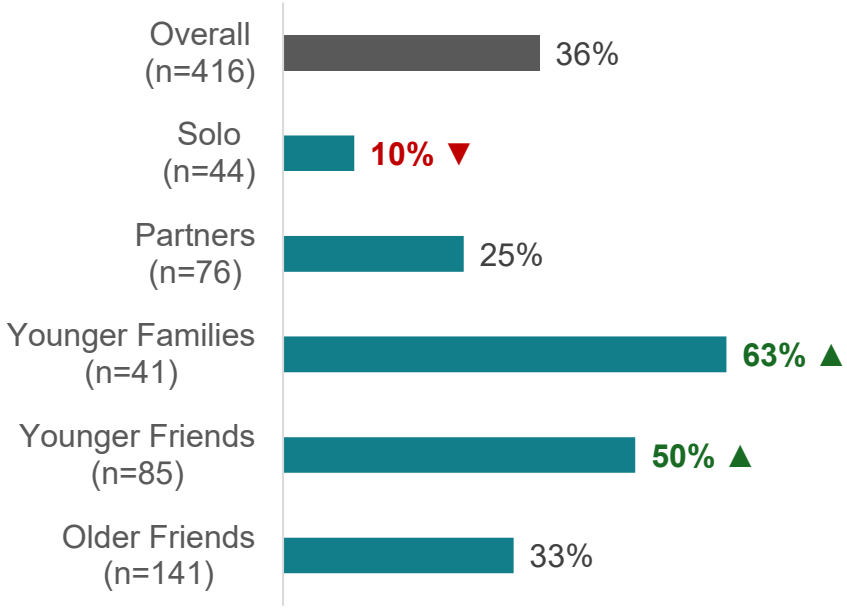
Membership is higher among U.S. Drive motorcyclists (42%) and lower among Ontario motorcyclists (15%). Younger families (63%) and younger friend groups (50%) are more likely than other traveller types to be members, while solo riders are less likely (10%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists (n=416). A10 Are you currently a member of a motorcycling-related club or association (e.g., riding club, snowmobile club, yacht/boating club)? % Yes shown; “No” (63%) and “Not sure” (<1%) not shown.

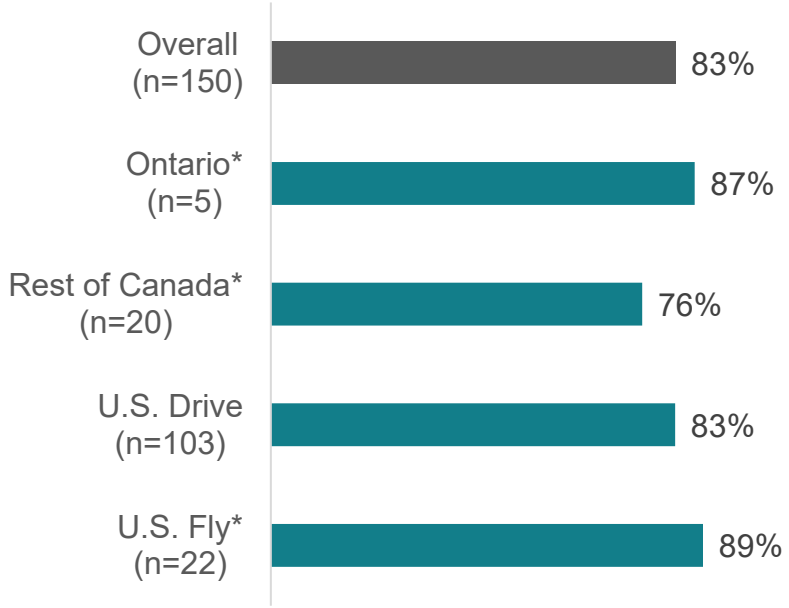
IMPORTANCE OF CLUB MEMBERSHIP

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

More than eight in ten club members (83%) say their membership is important to their overall motorcycling experience, including 54% who say it is very important.

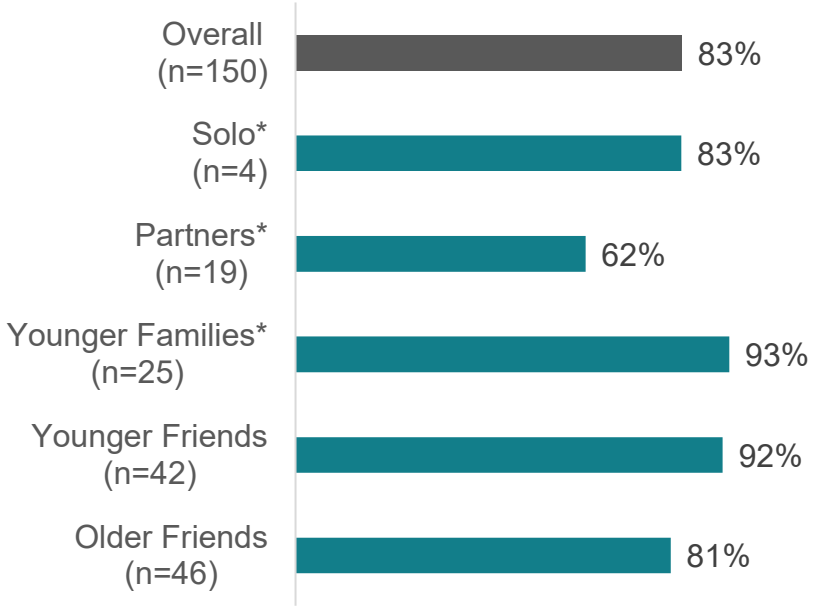
Most market and traveller type bases are small for this question. Importance ranges from 62% among partner members to 93% among younger family members, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: motorcyclists who are members of a motorcycling-related club or association (A10) (n=150). A10B (TOP2) How important is your club or association membership to your overall motorcycling experience? TOP2 = % somewhat or very important. *Small base (n<30); interpret with caution.

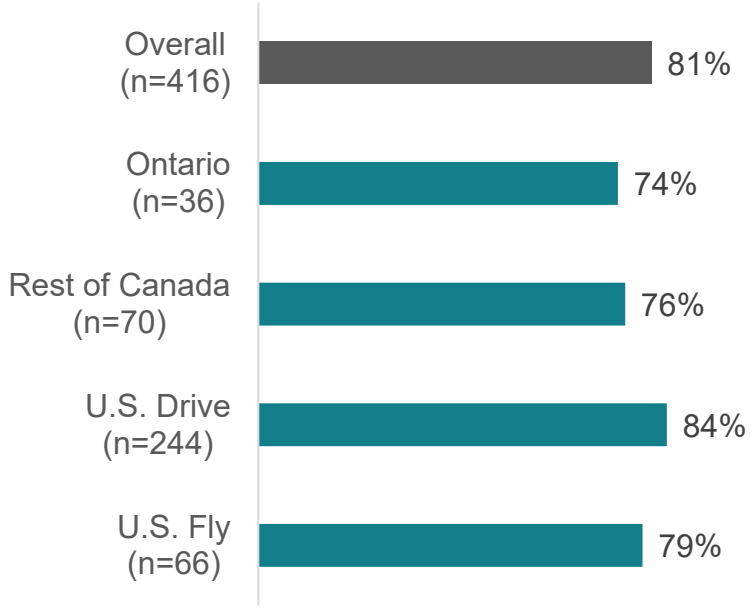
MOTORCYCLING AS A CENTRAL PART OF IDENTITY

All motorcyclists | Traveller types are defined on slide 10

Eight in ten motorcyclists (81%) agree that motorcycling and motorcycle culture is a central part of who they are, including 47% who strongly agree.

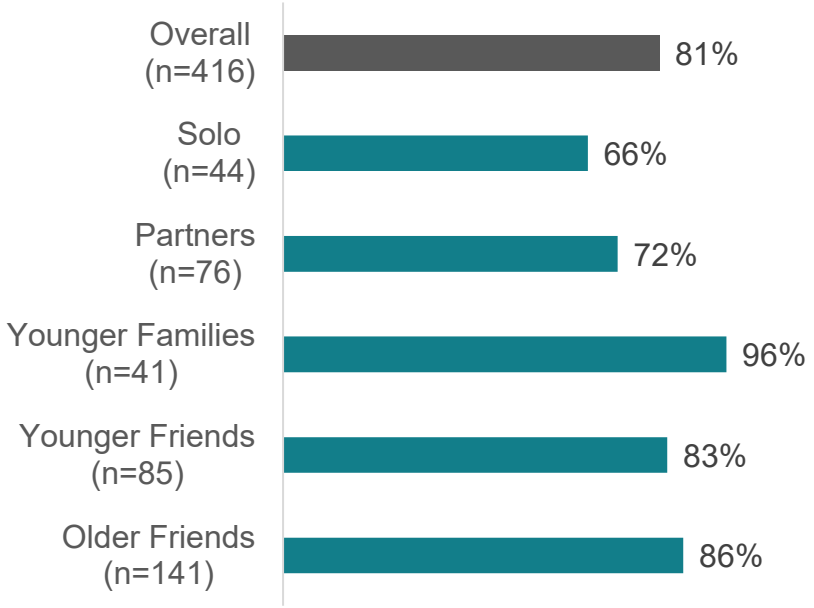
Agreement ranges from 74% among Ontario motorcyclists to 84% among U.S. Drive motorcyclists, and from 66% among solo riders to 96% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists (n=416). T2 (TOP2) How much do you agree or disagree with the following statement? "Motorcycling and motorcycle culture is a central part of who I am." TOP2 = % somewhat or strongly agree.

ROLE OF MOTORCYCLING IN TRAVEL DECISIONS – MARKET

All motorcyclists

Seven in ten motorcyclists say motorcycling is always (24%) or usually (45%) the primary purpose of their trips.

Ontario motorcyclists are the most likely to say it is often a secondary activity (41%), with no significant market differences.

Role in travel decisions	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
It is always the primary purpose of my trips	24%	15%	14%	27%	28%
It is usually the primary purpose, but not always	45%	31%	55%	46%	36%
It is often a secondary activity alongside other trip purposes	25%	41%	26%	21%	27%
It is rarely the primary purpose of my trips	5%	10%	4%	5%	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). T2B Which of the following best describes the role motorcycling plays in your travel decisions?

“Not sure” (1%) not shown.

ROLE OF MOTORCYCLING IN TRAVEL DECISIONS – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger families are the most likely to say motorcycling is always the primary purpose of their trips (42%).

Partners are the most likely to say it is often a secondary activity (37%). None of the traveller type differences are significant.

Role in travel decisions	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
It is always the primary purpose of my trips	24%	28%	16%	42%	28%	17%
It is usually the primary purpose, but not always	45%	39%	43%	47%	41%	51%
It is often a secondary activity alongside other trip purposes	25%	26%	37%	10%	21%	27%
It is rarely the primary purpose of my trips	5%	7%	4%	1%	9%	5%

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

Base: all motorcyclists (n=416). T2B Which of the following best describes the role motorcycling plays in your travel decisions?

"Not sure" (1%) not shown.



HOW THEY TRAVEL

PREFERRED SEASON FOR MOTORCYCLING – MARKET

All motorcyclists

Summer is the preferred season for motorcycling (77%), followed by fall (57%) and spring (53%), while 11% prefer winter.

Spring preference ranges from 34% among Ontario motorcyclists to 62% among U.S. Fly motorcyclists, with no significant market differences.

Season	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Winter (December – February)	11%	14%	3%	10%	19%
Spring (March – May)	53%	34%	39%	57%	62%
Summer (June – August)	77%	89%	80%	77%	72%
Fall (September – November)	57%	56%	39%	61%	59%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). T1 What is your preferred season for taking a motorcycling trip? Please select all that apply.

"Not sure" (0%) not shown.

PREFERRED SEASON FOR MOTORCYCLING – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer winter (37%), while older friend groups are less likely (2%).

Summer is the top season for every traveller type, from 75% among partners to 82% among solo riders.

Season	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Winter (December – February)	11%	3%	7%	37% ▲	11%	2% ▼
Spring (March – May)	53%	37%	46%	67%	64%	47%
Summer (June – August)	77%	82%	75%	77%	81%	79%
Fall (September – November)	57%	32%	64%	49%	57%	58%

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

Base: all motorcyclists (n=416). T1 What is your preferred season for taking a motorcycling trip? Please select all that apply.

"Not sure" (0%) not shown.

HOW MOTORCYCLISTS GET TO THEIR DESTINATIONS – MARKET

All motorcyclists

More than half of motorcyclists (57%) get to their destinations by personal vehicle, and a third (32%) by personal vehicle with a trailer. One in five (22%) give another answer.

U.S. Drive motorcyclists are more likely than other markets to travel with a trailer (40%).

Mode of travel	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Personal vehicle (car, truck, SUV)	57%	38%	59%	57%	64%
Personal vehicle with trailer (e.g., boat, camper, ATV)	32%	20%	16%	40% ▲	30%
RV / motorhome	13%	10%	3%	17%	11%
Fly to a regional hub, then drive	10%	13%	5%	10%	11%
Float plane or charter flight to a remote destination	7%	8%	2%	9%	8%
Other	22%	40%	24%	19%	21%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). T3 How do you typically get to your motorcycling destinations? Please select all that apply.

"Not sure" (2%) not shown.

HOW MOTORCYCLISTS GET TO THEIR DESTINATIONS – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to travel with a trailer (51%), by RV or motorhome (32%), by flying to a regional hub (21%) or by float plane or charter flight (28%).

Younger friend groups are more likely to use a personal vehicle (72%) or a trailer (48%).

Mode of travel	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Personal vehicle (car, truck, SUV)	57%	62%	51%	66%	72% ▲	47%
Personal vehicle with trailer (e.g., boat, camper, ATV)	32%	15%	18%	51% ▲	48% ▲	29%
RV / motorhome	13%	3%	14%	32% ▲	6%	14%
Fly to a regional hub, then drive	10%	4%	12%	21% ▲	10%	4%
Float plane or charter flight to a remote destination	7%	3%	4%	28% ▲	9%	2%
Other	22%	25%	29%	3% ▼	12% ▼	29%

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

Base: all motorcyclists (n=416). T3 How do you typically get to your motorcycling destinations? Please select all that apply.

"Not sure" (2%) not shown.

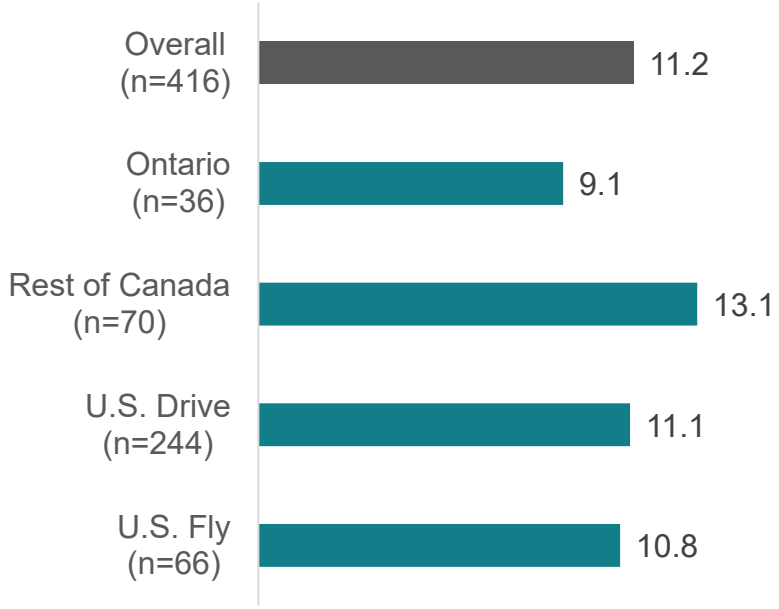
HOURS WILLING TO TRAVEL FOR A MOTORCYCLING TRIP

All motorcyclists | Traveller types are defined on slide 10

Motorcyclists are willing to travel an average of 11.2 hours one way for a motorcycling trip.

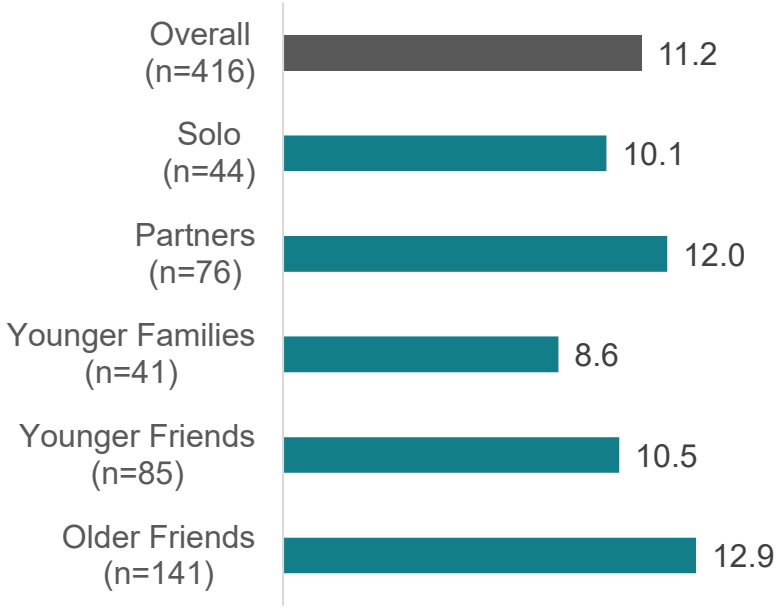
This ranges from 9.1 hours among Ontario motorcyclists to 13.1 among Rest of Canada motorcyclists, and from 8.6 hours among younger families to 12.9 among older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists (n=416). T4 Approximately how many hours are you willing to travel (one way) for a motorcycling trip? AVG = average number of hours.

APPROACH TO GEAR AND OUTFITTER USE – MARKET

All motorcyclists

Two-thirds of motorcyclists (68%) have their own gear or vehicle and do not use local outfitters or rental operators, while 29% also use them.

Relying on their own gear alone ranges from 56% among Rest of Canada motorcyclists to 73% among Ontario motorcyclists, with no significant market differences.

Approach	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	68%	73%	56%	70%	67%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	29%	27%	32%	28%	30%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	2%	0%	0%	2%	3%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). T5 Which of the following best describes your approach to motorcycling gear/vehicle and outfitter or rental operator use on overnight trips?

"Not sure" (2%) not shown.

APPROACH TO GEAR AND OUTFITTER USE – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Partners are more likely than other traveller types to rely on their own gear and vehicle alone (84%).

Younger families are the most likely to also use local outfitters or rental operators (43%).

Approach	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	68%	67%	84% ▲	51%	60%	72%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	29%	33%	16%	43%	37%	21%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	2%	0%	0%	6%	2%	1%

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

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

Base: all motorcyclists (n=416). T5 Which of the following best describes your approach to motorcycling gear/vehicle and outfitter or rental operator use on overnight trips?

"Not sure" (2%) not shown.

INDEPENDENT VS. GUIDED MOTORCYCLING – MARKET

All motorcyclists

Seven in ten motorcyclists (72%) mainly ride on their own or with their own group, fully self-guided, while a quarter (26%) use a mix of guided and self-guided.

Going fully self-guided ranges from 70% among U.S. Drive motorcyclists to 77% among Rest of Canada motorcyclists, with no significant market differences.

Approach	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
I mainly go on my own or with my own group – fully self-guided	72%	76%	77%	70%	72%
I use a mix of guided and self-guided	26%	21%	18%	29%	26%
I mainly use guided or outfitted experiences provided by operators	2%	0%	4%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). T6 When you go on a motorcycling trip, do you mainly go independently or use guided/outfitted experiences?

"Not sure" (1%) not shown.

INDEPENDENT VS. GUIDED MOTORCYCLING – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Older friend groups are more likely than other traveller types to go fully self-guided (84%), while younger families (45%) and younger friend groups (55%) are less likely.

Younger families (45%) and younger friend groups (42%) are more likely to use a mix of guided and self-guided, and younger families to mainly use guided or outfitted experiences (9%).

Approach	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
I mainly go on my own or with my own group – fully self-guided	72%	74%	86%	45% ▼	55% ▼	84% ▲
I use a mix of guided and self-guided	26%	26%	14%	45% ▲	42% ▲	15% ▼
I mainly use guided or outfitted experiences provided by operators	2%	0%	0%	9% ▲	1%	1%

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

Base: all motorcyclists (n=416). T6 When you go on a motorcycling trip, do you mainly go independently or use guided/outfitted experiences?

"Not sure" (1%) not shown.

PREFERRED TOURING STYLE – MARKET

All motorcyclists

Nearly two-thirds of motorcyclists (64%) prefer mostly self-guided, independent touring, 28% prefer a mix of both and 7% prefer mostly guided or packaged tours.

Self-guided touring ranges from 56% among U.S. Fly motorcyclists to 80% among Rest of Canada motorcyclists, with no significant market differences.

Touring style	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Mostly self-guided, independent touring	64%	70%	80%	61%	56%
Mostly guided or packaged tours	7%	9%	10%	6%	6%
A mix of both	28%	21%	10%	32%	38%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). N9D Which of the following best describes your preferred touring style? "Not sure" (1%) not shown.

PREFERRED TOURING STYLE – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Older friend groups are more likely than other traveller types to prefer mostly self-guided touring (80%), while younger families (23%) and younger friend groups (51%) are less likely.

Younger families are more likely to prefer a mix of both (58%) or mostly guided or packaged tours (19%).

Touring style	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Mostly self-guided, independent touring	64%	71%	68%	23% ▼	51% ▼	80% ▲
Mostly guided or packaged tours	7%	13%	2%	19% ▲	8%	4%
A mix of both	28%	16%	25%	58% ▲	41% ▲	16% ▼

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

Base: all motorcyclists (n=416). N9D Which of the following best describes your preferred touring style? "Not sure" (1%) not shown.



PLANNING & BOOKING

PLANNING LEAD TIME FOR MOTORCYCLING TRIPS – MARKET

All motorcyclists

Two-thirds of motorcyclists start planning 1 to 3 months (38%) or 3 to 6 months (28%) in advance, and one in five (20%) plan 6 months or more ahead.

Ontario motorcyclists are the most likely to plan 1 to 3 months ahead (59%), with no significant market differences.

Planning lead time	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Less than 1 month	14%	7%	16%	14%	12%
1 to 3 months	38%	59%	32%	36%	41%
3 to 6 months	28%	23%	27%	28%	28%
6 to 12 months	15%	11%	22%	14%	11%
More than 12 months in advance	5%	0%	4%	6%	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). B1 How far in advance do you typically start planning a motorcycling trip? "Not sure" (1%) not shown.

PLANNING LEAD TIME FOR MOTORCYCLING TRIPS – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Solo riders are the most likely to plan less than a month ahead (28%), and older friend groups the most likely to plan 6 to 12 months ahead (24%).

None of the traveller type differences are significant.

Planning lead time	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Less than 1 month	14%	28%	17%	13%	12%	8%
1 to 3 months	38%	34%	34%	40%	41%	40%
3 to 6 months	28%	31%	31%	35%	31%	21%
6 to 12 months	15%	8%	8%	9%	11%	24%
More than 12 months in advance	5%	0%	5%	2%	5%	6%

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

Base: all motorcyclists (n=416). B1 How far in advance do you typically start planning a motorcycling trip? "Not sure" (1%) not shown.

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

All motorcyclists

Word of mouth (55%) and general internet search (47%) are the most common sources motorcyclists use for inspiration and planning, followed by social media content (38%) and official tourism websites (29%).

Ontario motorcyclists are the most likely to use word of mouth (66%) and official tourism websites (49%), and U.S. Fly motorcyclists social media content (55%). None of the market differences are significant.

Source	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Word of mouth (e.g., friends or family)	55%	66%	55%	55%	51%
General internet search (e.g., Google, Bing)	47%	29%	49%	49%	50%
Social media content (e.g., Instagram, Facebook, YouTube)	38%	26%	16%	41%	55%
Official tourism websites (e.g., national, provincial, state, regional, city)	29%	49%	33%	27%	21%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	24%	23%	18%	26%	27%
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	11%	21%	24%	31%
TV shows or documentaries	22%	14%	13%	24%	26%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). B4 Which of the following do you use to find inspiration or plan your motorcycling trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All motorcyclists

About one in five motorcyclists use visitor centres (21%), articles, blogs or videos (21%), rally or event calendars (20%), magazines and travel guides (20%) or social media influencers (19%).

Rally or event calendars are used most by Rest of Canada motorcyclists (29%), with no significant market differences.

Source	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Travel information centres or visitor centres	21%	21%	17%	23%	16%
Articles, blogs, or videos about travel destinations	21%	15%	8%	23%	29%
Rally or event calendars	20%	16%	29%	18%	25%
Magazines, travel guides or brochures	20%	28%	15%	19%	21%
Social media influencers	19%	13%	16%	19%	24%
Forums or online communities	18%	10%	13%	20%	22%
Outdoor or sporting magazines or publications	14%	20%	9%	15%	14%
Club or association newsletters or websites	13%	7%	4%	16%	14%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). B4 Which of the following do you use to find inspiration or plan your motorcycling trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All motorcyclists

Fewer than one in seven motorcyclists use each of the remaining sources, including specialized apps (12%) and outfitter or lodge websites (11%).

None of the market differences are significant.

Source	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	12%	20%	14%	9%	20%
Outfitter or lodge websites	11%	14%	4%	13%	9%
Consumer shows/exhibitions	8%	12%	7%	8%	10%
Travel agents	7%	14%	2%	7%	12%
Email newsletters	7%	6%	12%	7%	4%
Travel-related phone lines or hotlines	6%	13%	0%	7%	7%
Other	<1%	0%	1%	<1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). B4 Which of the following do you use to find inspiration or plan your motorcycling trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All motorcyclists | Traveller types are defined on slide 10

Younger friend groups are more likely than other traveller types to use social media content (54%).

Partners and older friend groups are the most likely to use word of mouth (67% each), and solo riders the least likely (24%).

Source	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Word of mouth (e.g., friends or family)	55%	24%	67%	36%	55%	67%
General internet search (e.g., Google, Bing)	47%	54%	49%	42%	41%	52%
Social media content (e.g., Instagram, Facebook, YouTube)	38%	24%	38%	39%	54% ▲	29%
Official tourism websites (e.g., national, provincial, state, regional, city)	29%	22%	23%	28%	30%	33%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	24%	25%	25%	34%	36%	14%
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	8%	21%	40%	29%	16%
TV shows or documentaries	22%	13%	18%	30%	23%	20%

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

Base: all motorcyclists (n=416). B4 Which of the following do you use to find inspiration or plan your motorcycling trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All motorcyclists | Traveller types are defined on slide 10

Younger friend groups are more likely than other traveller types to use articles, blogs or videos (34%) and social media influencers (33%), and older friend groups rally or event calendars (32%).

Visitor centre use ranges from 3% among solo riders to 34% among younger families.

Source	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Travel information centres or visitor centres	21%	3%	23%	34%	21%	20%
Articles, blogs, or videos about travel destinations	21%	18%	17%	16%	34% ▲	15%
Rally or event calendars	20%	6%	14%	26%	11%	32% ▲
Magazines, travel guides or brochures	20%	14%	19%	31%	17%	20%
Social media influencers	19%	16%	15%	24%	33% ▲	9%
Forums or online communities	18%	7%	16%	28%	24%	18%
Outdoor or sporting magazines or publications	14%	15%	16%	20%	11%	14%
Club or association newsletters or websites	13%	0%	7%	25%	19%	12%

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

Base: all motorcyclists (n=416). B4 Which of the following do you use to find inspiration or plan your motorcycling trips? Please select all that apply.

"Not sure" (2%) not shown.

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

All motorcyclists | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use consumer shows or exhibitions (24%) and travel agents (25%).

Use of each other source on this slide is 23% or lower for every traveller type.

Source	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	12%	9%	4%	23%	16%	11%
Outfitter or lodge websites	11%	9%	6%	19%	14%	8%
Consumer shows/exhibitions	8%	0%	4%	24% ▲	9%	8%
Travel agents	7%	4%	6%	25% ▲	10%	3%
Email newsletters	7%	1%	4%	11%	8%	10%
Travel-related phone lines or hotlines	6%	6%	4%	16%	10%	2%
Other	<1%	0%	0%	0%	0%	1%

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

Base: all motorcyclists (n=416). B4 Which of the following do you use to find inspiration or plan your motorcycling trips? Please select all that apply.

"Not sure" (2%) not shown.

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

Motorcyclists who use social media to plan

YouTube and Facebook (73% each) are the most used social media platforms for motorcycling information, followed by Instagram (58%) and TikTok (48%).

Several market bases are small for this question, and none of the market differences are significant.

Platform	Overall (n=189)	Ontario* (n=11)	Rest of Canada* (n=21)	U.S. Drive (n=118)	U.S. Fly (n=39)
YouTube	73%	89%	22%	77%	82%
Facebook	73%	59%	73%	72%	81%
Instagram	58%	53%	66%	54%	67%
TikTok	48%	39%	22%	52%	54%
Reddit	35%	25%	23%	39%	33%
X (formerly known as Twitter)	29%	12%	16%	34%	26%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who use social media to plan (B4) (n=189). B4B Which social media platforms do you use to obtain information about your motorcycling trips? Please select all that apply.

"Not sure" (0%) not shown.

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

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

Motorcyclists who use social media to plan

Fewer than one in five motorcyclists who use social media use Snapchat (20%), WhatsApp (18%), Pinterest (16%) or Threads (14%).

None of the market differences are significant.

Platform	Overall (n=189)	Ontario* (n=11)	Rest of Canada* (n=21)	U.S. Drive (n=118)	U.S. Fly (n=39)
Snapchat	20%	28%	10%	18%	27%
WhatsApp	18%	31%	6%	15%	29%
Pinterest	16%	14%	4%	19%	17%
Threads	14%	8%	0%	17%	16%
Other	1%	0%	0%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who use social media to plan (B4) (n=189). B4B Which social media platforms do you use to obtain information about your motorcycling trips? Please select all that apply.

"Not sure" (0%) not shown.

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

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

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

Younger friend groups are more likely than other traveller types to use Instagram (75%), while older friend groups are less likely (37%).

Younger families are the most likely to use YouTube (90%).

Platform	Overall (n=189)	Solo* (n=17)	Partners (n=31)	Younger Families* (n=20)	Younger Friends (n=56)	Older Friends (n=49)
YouTube	73%	34%	68%	90%	82%	72%
Facebook	73%	81%	75%	71%	69%	75%
Instagram	58%	41%	56%	76%	75% ▲	37% ▼
TikTok	48%	10%	58%	52%	56%	42%
Reddit	35%	40%	22%	40%	38%	26%
X (formerly known as Twitter)	29%	5%	16%	47%	37%	26%

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

Base: motorcyclists who use social media to plan (B4) (n=189). B4B Which social media platforms do you use to obtain information about your motorcycling trips? Please select all that apply.

"Not sure" (0%) not shown.

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

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

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

Younger families are the most likely to use Snapchat (53%) and WhatsApp (51%), although the differences are not significant.

Use of each of these platforms is 5% or lower among solo riders.

Platform	Overall (n=189)	Solo* (n=17)	Partners (n=31)	Younger Families* (n=20)	Younger Friends (n=56)	Older Friends (n=49)
Snapchat	20%	0%	10%	53%	20%	17%
WhatsApp	18%	5%	11%	51%	16%	10%
Pinterest	16%	0%	15%	29%	16%	14%
Threads	14%	0%	4%	30%	12%	14%
Other	1%	0%	0%	2%	0%	2%

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

Base: motorcyclists who use social media to plan (B4) (n=189). B4B Which social media platforms do you use to obtain information about your motorcycling trips? Please select all that apply.

"Not sure" (0%) not shown.

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

HOW MOTORCYCLING TRIPS ARE BOOKED – MARKET

All motorcyclists

Booking directly with accommodation providers (54%) and through online booking platforms (49%) are the most common ways motorcyclists book trips, followed by booking informally through friends or personal contacts (34%).

Online booking is highest among U.S. Fly motorcyclists (59%), with no significant market differences.

Booking method	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Directly with accommodation providers (lodge, hotel, cottage)	54%	65%	53%	52%	57%
Through an online booking platform (e.g., Booking.com, Expedia)	49%	41%	44%	48%	59%
Informally through friends or personal contacts	34%	32%	21%	39%	33%
Directly with outfitters or guides	21%	16%	21%	22%	18%
Through a sporting or outdoor club or association	14%	7%	11%	15%	16%
Through a travel agent or tour operator	11%	9%	5%	13%	13%
Other	<1%	0%	1%	0%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). B2 How do you typically book your motorcycling trips? Please select all that apply. "Not sure" (2%) not shown.

HOW MOTORCYCLING TRIPS ARE BOOKED – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to book directly with outfitters or guides (55%), through a travel agent or tour operator (35%) and through a sporting or outdoor club or association (33%).

Older friend groups are less likely to book directly with outfitters or guides (7%).

Booking method	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Directly with accommodation providers (lodge, hotel, cottage)	54%	53%	44%	44%	46%	62%
Through an online booking platform (e.g., Booking.com, Expedia)	49%	31%	55%	46%	55%	48%
Informally through friends or personal contacts	34%	18%	26%	42%	41%	36%
Directly with outfitters or guides	21%	27%	11%	55% ▲	29%	7% ▼
Through a sporting or outdoor club or association	14%	8%	7%	33% ▲	19%	7%
Through a travel agent or tour operator	11%	10%	7%	35% ▲	15%	5%
Other	<1%	0%	0%	0%	0%	0%

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

Base: all motorcyclists (n=416). B2 How do you typically book your motorcycling trips? Please select all that apply. "Not sure" (2%) not shown.

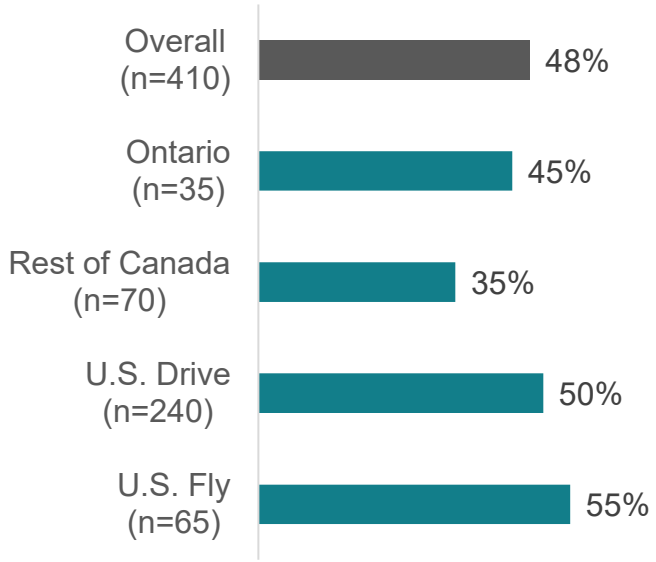
IMPORTANCE OF WORKING WITH LOCAL OPERATORS

All motorcyclists | Traveller types are defined on slide 10

Half of motorcyclists (48%) say working with a local outfitter, guide, rental operator, marina or accommodation provider is important when planning a trip.

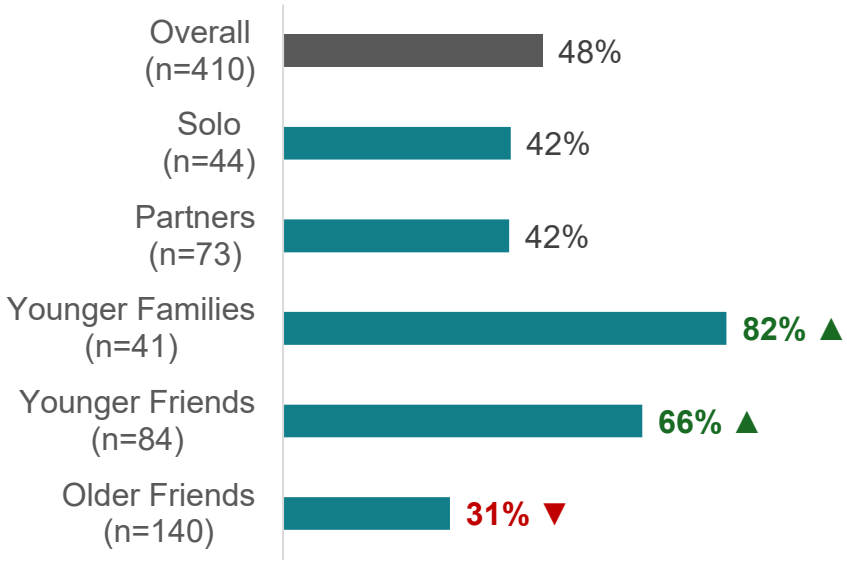
Younger families (82%) and younger friend groups (66%) place more importance on it than other traveller types, while older friend groups place less (31%). Market differences are not significant, ranging from 35% among Rest of Canada motorcyclists to 55% among U.S. Fly motorcyclists.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists, excluding “Don’t know” (n=410). B3 (TOP2) When planning a motorcycling trip, how important is working with a local outfitter, guide, rental operator, marina, or accommodation provider? TOP2 = % somewhat or very important.
“Local operators” in this question include accommodation providers and marinas as well as outfitters, guides and rental operators.

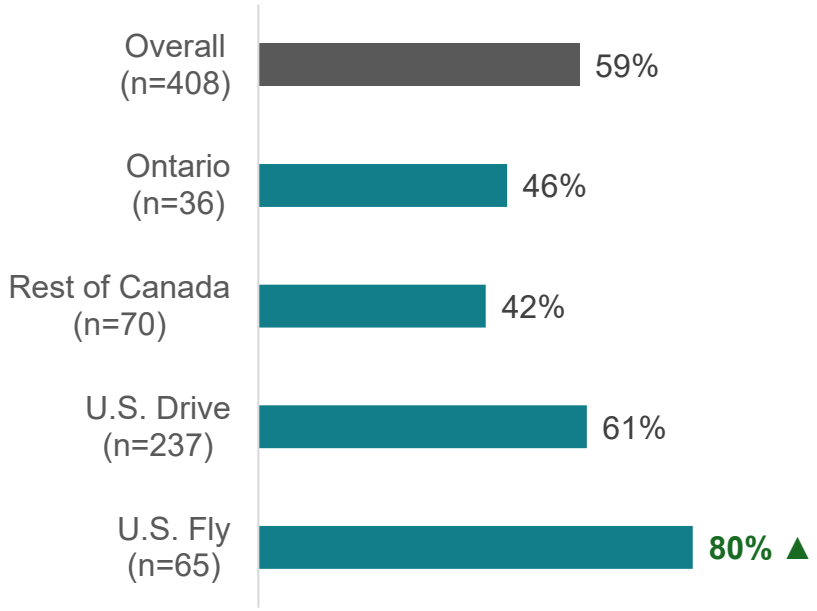
LIKELIHOOD OF USING AI TOOLS TO PLAN

All motorcyclists | Traveller types are defined on slide 10

Six in ten motorcyclists (59%) are likely to use AI tools to help plan their next motorcycling trip.

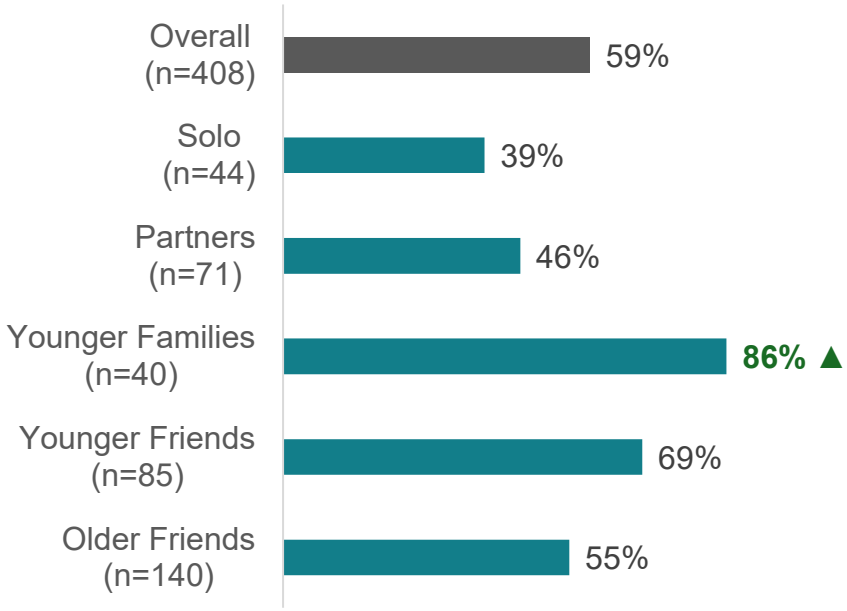
Likelihood is higher among U.S. Fly motorcyclists (80%) and younger families (86%) than among other markets and traveller types, and lowest among solo riders (39%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists, excluding “Don’t know” (n=408). B5 (TOP2) How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next motorcycling trip? TOP2 = % somewhat or very likely.

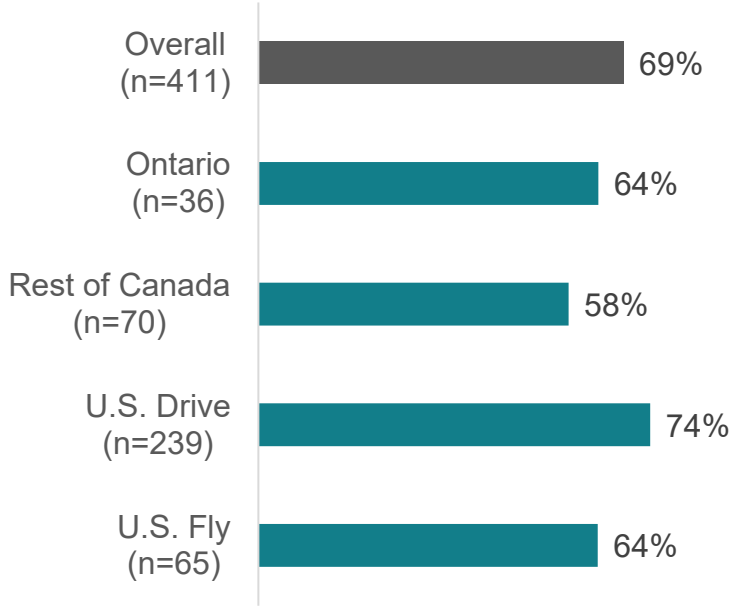
IMPORTANCE OF CERTIFICATION OR DESIGNATION

All motorcyclists | Traveller types are defined on slide 10

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

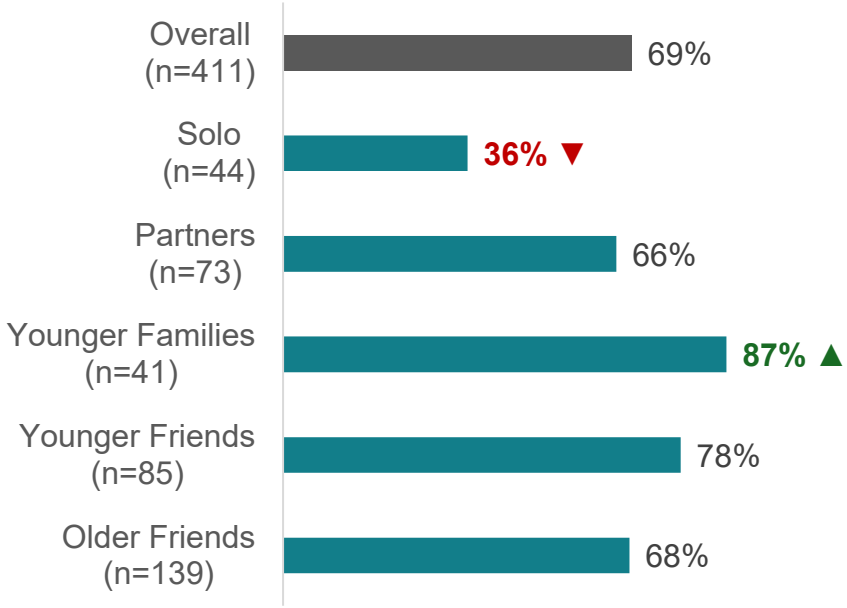
Younger families place more importance on certification than other traveller types (87%), while solo riders place less (36%). Market differences are not significant.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists, excluding “Don’t know” (n=411). B6 (TOP2) How important is it that accommodations, operators, or destinations hold a recognized certification or designation (e.g., motorcycle-friendly, snowmobile-friendly, ORV-friendly)? TOP2 = % somewhat or very important.

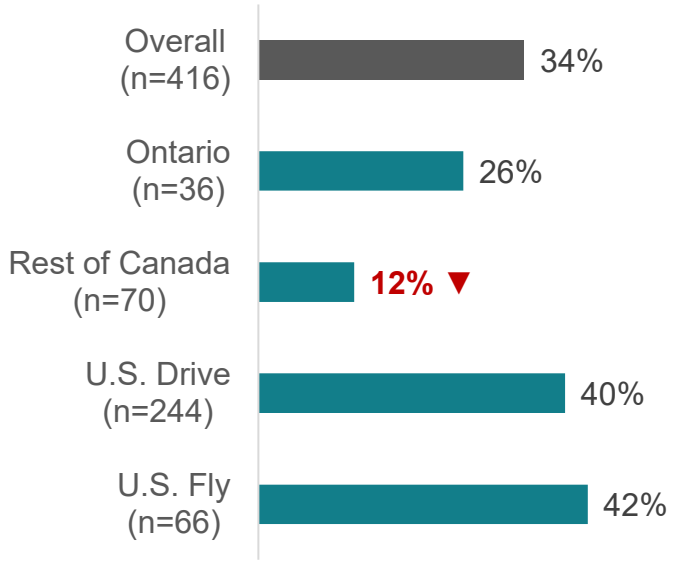
USE OF CERTIFIED ROUTES, TRAIL PASSES OR PASSPORT PROGRAMS

All motorcyclists | Traveller types are defined on slide 10

A third of motorcyclists (34%) have used an established or certified touring route, trail pass network or rewards/passport program when planning a motorcycling trip.

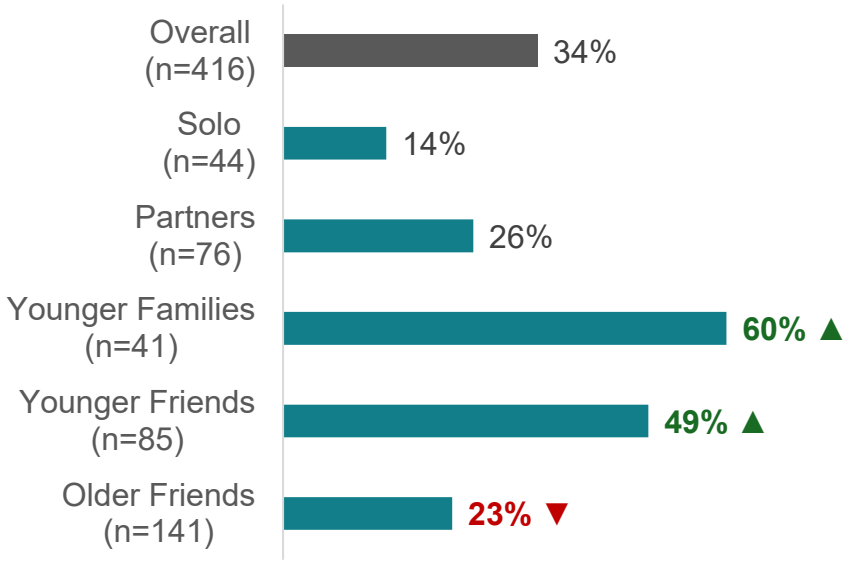
Use is lower among Rest of Canada motorcyclists (12%). Younger families (60%) and younger friend groups (49%) are more likely than other traveller types to have used one, while older friend groups are less likely (23%).

MARKET



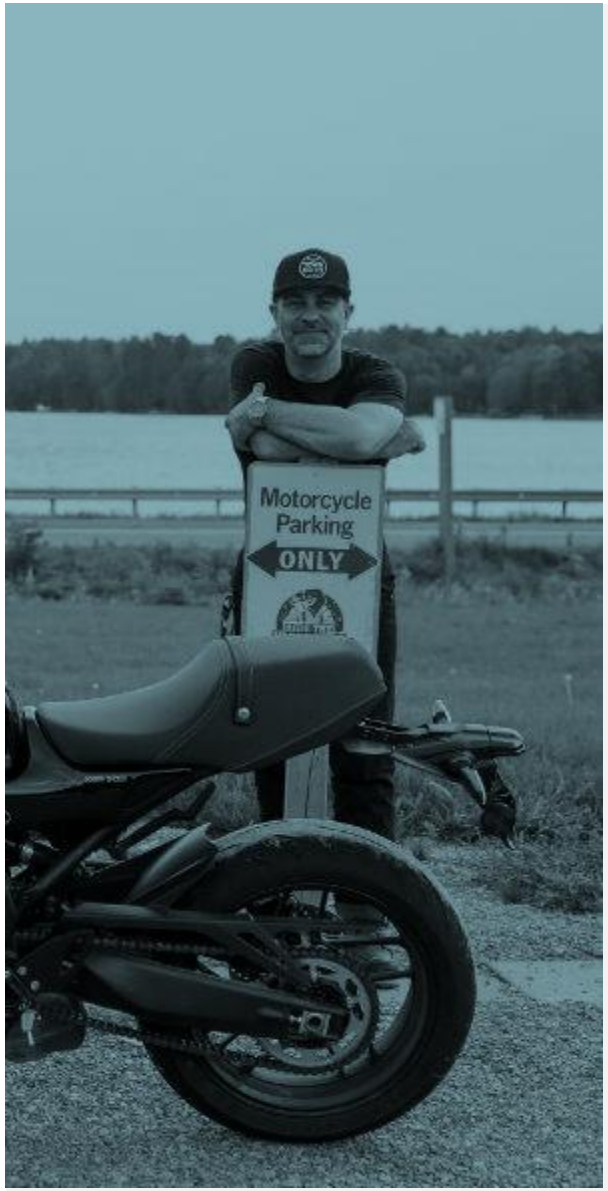
▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists (n=416). B7 Have you used an established or certified touring route, trail pass network, or rewards/passport program (e.g., the OFSC trail system, a certified motorcycle touring route) when planning a motorcycling trip? % Yes shown; "No" (56%) and "Not sure" (10%) not shown.
The OFSC example in this question was shared across all five activities and is not specific to motorcycling.



MOTIVATION & VALUES

MOTIVATIONS FOR MOTORCYCLING – MARKET (1 OF 2)

All motorcyclists

Escape from everyday stress and routine (68%) and experiencing new places and landscapes (62%) are the top motivations for motorcycling trips, followed by exploring open roads (57%) and thrill, challenge or adventure (53%).

Ontario motorcyclists are the most likely to be motivated by thrill, challenge or adventure (67%). None of the market differences are significant.

Motivation	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Escape from everyday stress and routine	68%	61%	73%	67%	72%
Experiencing new places and landscapes	62%	58%	48%	63%	71%
Exploring open roads, trails, or waterways	57%	52%	51%	61%	47%
Thrill, challenge, or sense of adventure	53%	67%	41%	52%	60%
Connection with nature and the outdoors	49%	46%	45%	54%	40%
Bonding with friends or family	48%	54%	35%	49%	54%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.

"Not sure" (1%) not shown.

MOTIVATIONS FOR MOTORCYCLING – MARKET (2 OF 2)

All motorcyclists

Four in ten motorcyclists (43%) are motivated by solitude and personal reflection, and a third by wildlife encounters (33%) or camaraderie with other motorcycling enthusiasts (32%).

None of the market differences are significant.

Motivation	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Solitude and personal reflection	43%	47%	50%	40%	45%
Wildlife encounters and natural discovery	33%	27%	37%	33%	30%
Camaraderie or connection with other motorcycling enthusiasts	32%	32%	29%	34%	30%
Physical fitness and health	20%	15%	8%	21%	30%
Tradition or cultural heritage related to the activity	17%	21%	9%	17%	22%
Other	<1%	5% ▲	0%	0%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.

"Not sure" (1%) not shown.

MOTIVATIONS FOR MOTORCYCLING – TRAVELLER TYPE (1 OF 2)

All motorcyclists | Traveller types are defined on slide 10

Solo riders are less likely than other traveller types to be motivated by bonding with friends or family (5%).

Older friend groups are the most likely to be motivated by escape (80%), and younger friend groups by exploring open roads (64%).

Motivation	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Escape from everyday stress and routine	68%	56%	71%	49%	62%	80%
Experiencing new places and landscapes	62%	58%	66%	48%	54%	69%
Exploring open roads, trails, or waterways	57%	52%	45%	48%	64%	63%
Thrill, challenge, or sense of adventure	53%	41%	42%	53%	56%	64%
Connection with nature and the outdoors	49%	49%	49%	36%	55%	52%
Bonding with friends or family	48%	5% ▼	48%	47%	59%	54%

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

Base: all motorcyclists (n=416). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.

"Not sure" (1%) not shown.

MOTIVATIONS FOR MOTORCYCLING – TRAVELLER TYPE (2 OF 2)

All motorcyclists | Traveller types are defined on slide 10

Older friend groups are more likely than other traveller types to be motivated by camaraderie with other motorcycling enthusiasts (49%), while partners are less likely (13%).

Younger families are more likely to be motivated by physical fitness and health (48%) and less likely by solitude and personal reflection (21%).

Motivation	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Solitude and personal reflection	43%	53%	36%	21% ▼	41%	51%
Wildlife encounters and natural discovery	33%	19%	31%	43%	38%	31%
Camaraderie or connection with other motorcycling enthusiasts	32%	13%	13% ▼	25%	35%	49% ▲
Physical fitness and health	20%	8%	21%	48% ▲	29%	9%
Tradition or cultural heritage related to the activity	17%	13%	10%	32%	17%	14%
Other	<1%	0%	0%	0%	0%	1%

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

Base: all motorcyclists (n=416). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All motorcyclists

Scenic driving or road trip components (52%) and Northern Lights or dark sky viewing (47%) are the additional experiences most likely to enhance a motorcycling trip, followed by culinary experiences (39%) and motorcycling rallies, races or club events (32%).

Culinary experiences are highest among Ontario (56%) and Rest of Canada (52%) motorcyclists. None of the market differences are significant.

Additional experience	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Scenic driving or road trip components	52%	59%	49%	54%	47%
Northern Lights or dark sky viewing experiences	47%	52%	33%	50%	47%
Culinary experiences featuring locally sourced or freshly caught / harvested food	39%	56%	52%	34%	35%
Motorcycling rallies, races, or club events	32%	42%	16%	34%	36%
All-inclusive lodge or touring packages	31%	23%	28%	33%	34%
Wildlife viewing separate from motorcycling	31%	26%	23%	35%	30%
Multi-stop regional itineraries combining several Northern Ontario areas	27%	38%	20%	29%	23%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). M2 Beyond motorcycling itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (2%) not shown.

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

All motorcyclists

About one in five motorcyclists are interested in wellness experiences (24%), multi-activity packages (22%), Indigenous-led experiences (21%) or photography experiences (20%). Seven percent would prefer to focus entirely on motorcycling.

None of the market differences are significant.

Additional experience	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	24%	10%	32%	21%	32%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	22%	22%	9%	25%	24%
Indigenous-led cultural or land-based experiences	21%	35%	15%	19%	27%
Photography or nature interpretation guided experiences	20%	15%	13%	22%	20%
Learning and interpretation opportunities	15%	12%	13%	15%	18%
Youth or family-oriented introduction-to-motorcycling programs	11%	15%	4%	13%	12%
None – I prefer to focus entirely on motorcycling	7%	0%	9%	7%	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). M2 Beyond motorcycling itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (2%) not shown.

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

All motorcyclists | Traveller types are defined on slide 10

Older friend groups show the highest interest in scenic driving (64%), younger families in rallies, races or club events (47%) and younger friend groups in Northern Lights viewing (60%).

Rallies and club events are of little interest to solo riders (7%). None of the traveller type differences are significant.

Additional experience	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Scenic driving or road trip components	52%	41%	54%	39%	49%	64%
Northern Lights or dark sky viewing experiences	47%	33%	51%	45%	60%	42%
Culinary experiences featuring locally sourced or freshly caught / harvested food	39%	33%	35%	40%	43%	38%
Motorcycling rallies, races, or club events	32%	7%	29%	47%	29%	43%
All-inclusive lodge or touring packages	31%	20%	29%	39%	37%	27%
Wildlife viewing separate from motorcycling	31%	36%	31%	37%	37%	27%
Multi-stop regional itineraries combining several Northern Ontario areas	27%	16%	22%	40%	25%	27%

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

Base: all motorcyclists (n=416). M2 Beyond motorcycling itself, which of the following additional experiences would enhance your trip? Please select all that apply.

“Not sure” (2%) not shown.

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

All motorcyclists | Traveller types are defined on slide 10

Younger families show the highest interest in most of these experiences, including multi-activity packages (38%) and wellness experiences (34%).

None of the traveller type differences are significant.

Additional experience	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	24%	21%	19%	34%	32%	15%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	22%	9%	14%	38%	35%	14%
Indigenous-led cultural or land-based experiences	21%	15%	18%	33%	20%	19%
Photography or nature interpretation guided experiences	20%	3%	15%	29%	30%	16%
Learning and interpretation opportunities	15%	2%	16%	25%	20%	8%
Youth or family-oriented introduction-to-motorcycling programs	11%	9%	14%	21%	15%	5%
None – I prefer to focus entirely on motorcycling	7%	11%	10%	4%	3%	7%

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

Base: all motorcyclists (n=416). M2 Beyond motorcycling itself, which of the following additional experiences would enhance your trip? Please select all that apply.

"Not sure" (2%) not shown.

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

Motorcyclists who provided a response

When asked what makes a motorcycling trip successful, motorcyclists most often mention fun and enjoyment (32%), safety and getting home safely (28%) and good roads, routes and the open road (27%).

U.S. Drive and U.S. Fly motorcyclists are the most likely to mention safety (32% each), and Ontario (25%) and Rest of Canada (22%) motorcyclists new experiences. None of the market differences are significant.

Theme	Overall (n=414)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=242)	U.S. Fly (n=66)
Fun / enjoyment / a good time	32%	32%	25%	34%	31%
Safety / no accidents / getting home safely	28%	20%	16%	32%	32%
Good roads / routes / open road	27%	29%	31%	25%	30%
Scenery / nature / wildlife	17%	15%	12%	17%	23%
Time with family, friends or loved ones	13%	12%	12%	13%	15%
Relaxation / peace / stress-free	13%	15%	9%	13%	14%
Good weather	13%	12%	20%	12%	7%
New experiences / exploring / learning	12%	25%	22%	9%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who provided a response (n=414). M3 In your own words, what makes a motorcycling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (<1%) not shown.

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

Motorcyclists who provided a response

Fewer than one in ten motorcyclists mention each of the themes on this slide, led by no problems (9%) and escape or getting away (9%).

None of the market differences are significant.

Theme	Overall (n=414)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=242)	U.S. Fly (n=66)
No problems / things go smoothly	9%	8%	1%	12%	11%
Escape / getting away / unplugging / freedom	9%	8%	1%	10%	12%
Everyone in the group enjoys it	7%	3%	5%	9%	5%
Adventure / excitement / thrill	5%	14%	7%	3%	6%
Good planning / preparation / reliable equipment	5%	5%	3%	6%	3%
Bonding / making memories	3%	7%	5%	2%	5%
Coming home happy / satisfied / wanting to return	2%	5%	0%	2%	4%
Local culture / meeting people	2%	0%	4%	2%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who provided a response (n=414). M3 In your own words, what makes a motorcycling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (<1%) not shown.

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

Motorcyclists who provided a response

Each remaining theme is mentioned by 1% of motorcyclists or fewer, apart from general positive (4%) and other responses (7%).

Theme	Overall (n=414)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=242)	U.S. Fly (n=66)
Good accommodation / campsites / amenities	1%	0%	1%	1%	2%
Good food and drink	1%	0%	1%	1%	1%
Affordable / good value / on budget	1%	0%	0%	1%	1%
Calm water / good boating conditions	<1%	5%	0%	0%	0%
Fishing / catching fish	0%	0%	0%	0%	0%
Good trails / snow conditions	0%	0%	0%	0%	0%
General positive / vague	4%	3%	1%	4%	6%
Other	7%	8%	5%	5%	15%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who provided a response (n=414). M3 In your own words, what makes a motorcycling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (<1%) not shown.

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

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

Younger friend groups are the most likely to mention fun and enjoyment (42%), older friend groups safety (34%), and partners and older friend groups good roads (33% each).

Solo riders rarely mention scenery (1%) or time with family and friends (0%). None of the traveller type differences are significant.

Theme	Overall (n=414)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=84)	Older Friends (n=141)
Fun / enjoyment / a good time	32%	32%	23%	33%	42%	34%
Safety / no accidents / getting home safely	28%	22%	25%	29%	25%	34%
Good roads / routes / open road	27%	22%	33%	17%	18%	33%
Scenery / nature / wildlife	17%	1%	23%	15%	19%	20%
Time with family, friends or loved ones	13%	0%	14%	21%	18%	13%
Relaxation / peace / stress-free	13%	15%	20%	12%	13%	10%
Good weather	13%	17%	21%	6%	8%	11%
New experiences / exploring / learning	12%	8%	7%	17%	9%	18%

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

Base: motorcyclists who provided a response (n=414). M3 In your own words, what makes a motorcycling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (<1%) not shown.

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

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

Mentions of each theme on this slide are 14% or lower for every traveller type.

None of the traveller type differences are significant.

Theme	Overall (n=414)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=84)	Older Friends (n=141)
No problems / things go smoothly	9%	8%	10%	8%	9%	11%
Escape / getting away / unplugging / freedom	9%	13%	14%	3%	11%	5%
Everyone in the group enjoys it	7%	0%	2%	1%	10%	13%
Adventure / excitement / thrill	5%	14%	4%	5%	6%	4%
Good planning / preparation / reliable equipment	5%	1%	3%	7%	7%	4%
Bonding / making memories	3%	4%	5%	1%	4%	2%
Coming home happy / satisfied / wanting to return	2%	2%	2%	2%	4%	3%
Local culture / meeting people	2%	0%	1%	1%	1%	4%

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

Base: motorcyclists who provided a response (n=414). M3 In your own words, what makes a motorcycling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (<1%) not shown.

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

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

Each remaining theme is mentioned by 14% or fewer in every traveller type.

Theme	Overall (n=414)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=84)	Older Friends (n=141)
Good accommodation / campsites / amenities	1%	3%	1%	2%	2%	0%
Good food and drink	1%	0%	1%	0%	2%	2%
Affordable / good value / on budget	1%	3%	0%	0%	2%	0%
Calm water / good boating conditions	<1%	0%	0%	0%	0%	1%
Fishing / catching fish	0%	0%	0%	0%	0%	0%
Good trails / snow conditions	0%	0%	0%	0%	0%	0%
General positive / vague	4%	4%	2%	7%	6%	1%
Other	7%	4%	6%	14%	6%	4%

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

Base: motorcyclists who provided a response (n=414). M3 In your own words, what makes a motorcycling trip successful for you? Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (<1%) not shown.

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

Motorcyclists who provided a response

Motorcyclists see Northern Ontario's scenery and natural beauty (35%) as its greatest advantage for motorcycling, followed by good roads and scenic routes (23%) and wilderness (22%).

Scenery is mentioned least by Rest of Canada motorcyclists (14%), and good roads most by U.S. Fly (34%) and Ontario (31%) motorcyclists. None of the market differences are significant.

Advantage	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=68)	U.S. Drive (n=243)	U.S. Fly (n=66)
Scenery / natural beauty / landscapes	35%	39%	14%	41%	34%
Good roads / scenic routes and drives	23%	31%	13%	21%	34%
Wilderness / untouched / pristine nature	22%	22%	11%	24%	23%
Uncrowded / quiet / remote / solitude	14%	22%	12%	14%	12%
Vast / open space / room to explore	12%	5%	5%	14%	12%
Wildlife	6%	0%	16%	5%	5%
Unique / different / new to me / in Canada	6%	4%	8%	5%	6%
Variety of things to do / places to explore	5%	2%	4%	5%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who provided a response (n=412). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for motorcycling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (11%) not shown.

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

Motorcyclists who provided a response

Each of the advantages on this slide is mentioned by 5% of motorcyclists or fewer.

Forests and fall colours are mentioned most by Rest of Canada motorcyclists (13%). None of the market differences are significant.

Advantage	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=68)	U.S. Drive (n=243)	U.S. Fly (n=66)
Northern lights / dark skies / stars	5%	10%	0%	5%	5%
Lakes / rivers / water	4%	3%	1%	4%	9%
Close to home / easy to get to	4%	3%	3%	4%	4%
Forests / trees / fall colours	3%	3%	13%	1%	2%
Culture / history / Indigenous heritage	3%	8%	0%	3%	1%
Friendly / welcoming people / hospitality	3%	0%	0%	3%	5%
Escape from the city / everyday life	2%	0%	0%	4%	1%
Trails / snow / terrain for riding	2%	5%	0%	2%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who provided a response (n=412). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for motorcycling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (11%) not shown.

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

Motorcyclists who provided a response

Each remaining advantage is mentioned by 2% of motorcyclists or fewer, and 9% give a general positive response.

Advantage	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=68)	U.S. Drive (n=243)	U.S. Fly (n=66)
Clean environment / fresh air	2%	0%	0%	2%	1%
Climate / cooler weather / seasons	1%	5%	0%	1%	1%
Safe destination	1%	2%	0%	1%	1%
Fishing	1%	0%	0%	1%	0%
Affordable / good value	<1%	2%	0%	1%	0%
General positive / vague	9%	5%	4%	10%	11%
Other	6%	0%	13%	4%	8%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who provided a response (n=412). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for motorcycling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (11%) not shown.

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

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

Scenery is the top advantage for most traveller types, while solo riders most often mention good roads and scenic routes (30%).

None of the traveller type differences are significant.

Advantage	Overall (n=412)	Solo (n=44)	Partners (n=76)	Younger Families (n=39)	Younger Friends (n=84)	Older Friends (n=140)
Scenery / natural beauty / landscapes	35%	15%	26%	26%	43%	41%
Good roads / scenic routes and drives	23%	30%	23%	21%	22%	20%
Wilderness / untouched / pristine nature	22%	13%	24%	22%	25%	20%
Uncrowded / quiet / remote / solitude	14%	17%	10%	16%	13%	12%
Vast / open space / room to explore	12%	4%	12%	18%	14%	9%
Wildlife	6%	0%	4%	0%	6%	12%
Unique / different / new to me / in Canada	6%	10%	4%	9%	5%	6%
Variety of things to do / places to explore	5%	6%	2%	8%	5%	5%

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

Base: motorcyclists who provided a response (n=412). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for motorcycling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (11%) not shown.

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

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

Each of the advantages on this slide is mentioned by 9% or fewer in every traveller type.

Advantage	Overall (n=412)	Solo (n=44)	Partners (n=76)	Younger Families (n=39)	Younger Friends (n=84)	Older Friends (n=140)
Northern lights / dark skies / stars	5%	2%	2%	4%	4%	8%
Lakes / rivers / water	4%	2%	1%	3%	9%	3%
Close to home / easy to get to	4%	2%	2%	2%	2%	4%
Forests / trees / fall colours	3%	0%	1%	3%	3%	7%
Culture / history / Indigenous heritage	3%	5%	1%	3%	2%	4%
Friendly / welcoming people / hospitality	3%	0%	3%	2%	1%	4%
Escape from the city / everyday life	2%	0%	5%	1%	3%	2%
Trails / snow / terrain for riding	2%	4%	2%	6%	2%	1%

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

Base: motorcyclists who provided a response (n=412). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for motorcycling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (11%) not shown.

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

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

Younger families are the most likely to give a general positive response (23%).

Advantage	Overall (n=412)	Solo (n=44)	Partners (n=76)	Younger Families (n=39)	Younger Friends (n=84)	Older Friends (n=140)
Clean environment / fresh air	2%	3%	0%	5%	1%	2%
Climate / cooler weather / seasons	1%	2%	0%	1%	3%	1%
Safe destination	1%	0%	0%	3%	1%	0%
Fishing	1%	0%	3%	1%	0%	0%
Affordable / good value	<1%	0%	2%	2%	0%	0%
General positive / vague	9%	6%	9%	23%	11%	5%
Other	6%	8%	9%	7%	6%	3%

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

Base: motorcyclists who provided a response (n=412). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for motorcycling trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (11%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (1 OF 3)

Motorcyclists who provided a response

Motorcyclists most often describe sustainable tourism as protecting or preserving the environment and nature (32%), followed by tourism that lasts (19%) and minimal impact (13%).

Rest of Canada motorcyclists are the most likely to mention eco-friendly practices (21%). None of the market differences are significant.

Meaning	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=240)	U.S. Fly (n=66)
Protecting / preserving the environment and nature	32%	38%	36%	32%	27%
Tourism that lasts / keeps visitors coming back	19%	26%	22%	19%	10%
Minimal impact / not harming or damaging	13%	14%	19%	11%	15%
Benefiting / respecting local communities	11%	7%	14%	10%	12%
Good visitor experience (easy, enjoyable, lots to offer)	10%	10%	15%	10%	5%
Eco-friendly / green / recycling / less waste	10%	11%	21%	5%	12%
Supporting the local economy / businesses	9%	13%	10%	8%	11%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who provided a response (n=412). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (6%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (2 OF 3)

Motorcyclists who provided a response

Fewer than one in ten mention each of the themes on this slide, led by supporting the local economy (9%) and leave no trace (8%).

Ontario motorcyclists are the most likely to mention leave no trace (23%), and Rest of Canada motorcyclists responsible use of natural resources (15%).

Meaning	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=240)	U.S. Fly (n=66)
Leave no trace / leave it as you found it / no litter	8%	23%	6%	8%	6%
Respectful / responsible / mindful travel	7%	2%	3%	9%	7%
For future generations / so others can enjoy it later	6%	3%	5%	7%	5%
Responsible use of natural resources	5%	2%	15%	3%	1%
Respecting local culture / heritage	5%	0%	1%	7%	3%
Lower emissions / fuel / energy use	4%	5%	8%	3%	6%
Affordable / budget travel	4%	0%	0%	5%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who provided a response (n=412). V0 In your own words, what does sustainable tourism mean?
Coded open-ended responses; more than one theme could be coded per response.
“Don’t know / not sure” (6%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (3 OF 3)

Motorcyclists who provided a response

Each remaining theme is mentioned by 4% of motorcyclists or fewer, and 8% give a general positive response.

Meaning	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=240)	U.S. Fly (n=66)
Travelling / exploring / touring (term read literally)	4%	0%	3%	4%	8%
Balancing visitors, environment and community	2%	0%	0%	2%	5%
Protecting wildlife and habitats	2%	0%	2%	2%	3%
General positive / vague	8%	4%	4%	9%	10%
Other	8%	13%	6%	6%	11%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who provided a response (n=412). V0 In your own words, what does sustainable tourism mean?
Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (6%) not shown.

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

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

Solo riders are the most likely to describe sustainable tourism as tourism that lasts (33%) and minimal impact (21%).

None of the traveller type differences are significant.

Meaning	Overall (n=412)	Solo (n=42)	Partners (n=76)	Younger Families (n=40)	Younger Friends (n=83)	Older Friends (n=141)
Protecting / preserving the environment and nature	32%	30%	30%	30%	35%	34%
Tourism that lasts / keeps visitors coming back	19%	33%	25%	11%	12%	19%
Minimal impact / not harming or damaging	13%	21%	10%	14%	17%	10%
Benefiting / respecting local communities	11%	2%	9%	12%	12%	13%
Good visitor experience (easy, enjoyable, lots to offer)	10%	7%	10%	14%	9%	11%
Eco-friendly / green / recycling / less waste	10%	9%	10%	11%	6%	13%
Supporting the local economy / businesses	9%	6%	9%	20%	13%	7%

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

Base: motorcyclists who provided a response (n=412). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (6%) not shown.

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

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

Younger families are the most likely to mention supporting the local economy (20%).

None of the traveller type differences are significant.

Meaning	Overall (n=412)	Solo (n=42)	Partners (n=76)	Younger Families (n=40)	Younger Friends (n=83)	Older Friends (n=141)
Leave no trace / leave it as you found it / no litter	8%	10%	11%	3%	7%	9%
Respectful / responsible / mindful travel	7%	2%	6%	9%	11%	4%
For future generations / so others can enjoy it later	6%	5%	5%	8%	7%	6%
Responsible use of natural resources	5%	6%	8%	0%	2%	7%
Respecting local culture / heritage	5%	0%	2%	7%	9%	3%
Lower emissions / fuel / energy use	4%	14%	2%	0%	1%	4%
Affordable / budget travel	4%	0%	6%	3%	7%	4%

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

Base: motorcyclists who provided a response (n=412). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (6%) not shown.

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

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

Each remaining theme is mentioned by 8% or fewer in every traveller type, apart from general positive and other responses.

Meaning	Overall (n=412)	Solo (n=42)	Partners (n=76)	Younger Families (n=40)	Younger Friends (n=83)	Older Friends (n=141)
Travelling / exploring / touring (term read literally)	4%	5%	4%	4%	8%	2%
Balancing visitors, environment and community	2%	0%	2%	1%	3%	3%
Protecting wildlife and habitats	2%	1%	0%	1%	5%	1%
General positive / vague	8%	3%	4%	8%	12%	6%
Other	8%	0%	5%	16%	7%	10%

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

Base: motorcyclists who provided a response (n=412). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (6%) not shown.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – MARKET

All motorcyclists

More than eight in ten motorcyclists say supporting local businesses (85%), conservation (84%), minimal environmental impact (82%) and community benefit (81%) are important when choosing a destination.

Ontario motorcyclists place the least importance on minimal environmental impact (68%). None of the market differences are significant.

Consideration	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=241)	U.S. Fly (n=65)
Supporting local, independently owned businesses	85%	88%	85%	85%	84%
Conservation and responsible resource management	84%	80%	85%	85%	80%
Minimal environmental impact of tourism in the area	82%	68%	82%	83%	87%
Community benefit – tourism dollars staying in the local community	81%	73%	73%	83%	82%
Accessibility for people with mobility or physical needs	66%	57%	62%	67%	69%
Learning about Indigenous culture and history	64%	57%	51%	67%	69%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=403 to 412). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Solo riders place the least importance on most considerations, including learning about Indigenous culture and history (29%) and community benefit (55%).

Younger families place the most importance on accessibility (83%) and Indigenous culture and history (84%). None of the traveller type differences are significant.

Consideration	Overall (n=412)	Solo (n=44)	Partners (n=73)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=140)
Supporting local, independently owned businesses	85%	70%	84%	90%	87%	86%
Conservation and responsible resource management	84%	82%	84%	86%	85%	81%
Minimal environmental impact of tourism in the area	82%	79%	76%	87%	84%	81%
Community benefit – tourism dollars staying in the local community	81%	55%	73%	88%	85%	87%
Accessibility for people with mobility or physical needs	66%	41%	63%	83%	74%	64%
Learning about Indigenous culture and history	64%	29%	63%	84%	74%	58%

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

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=403 to 412). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (1 OF 2)

All motorcyclists

Nearly nine in ten motorcyclists (88%) feel a personal responsibility to protect the natural environments they visit, and seven in ten are interested in contributing to wildlife conservation (72%).

Rest of Canada motorcyclists are less likely than other markets to be interested in contributing to wildlife conservation (47%) or in an Indigenous-led guided experience (39%).

Statement	Overall (n=410)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=241)	U.S. Fly (n=65)
I feel a personal responsibility to protect natural environments I visit	88%	85%	88%	90%	80%
I am interested in contributing to wildlife conservation when I travel	72%	72%	47% ▼	78%	75%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	69%	70%	64%	69%	73%
I would be interested in an Indigenous-led guided experience	64%	64%	39% ▼	69%	71%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=400 to 410). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (2 OF 2)

All motorcyclists

Six in ten motorcyclists actively seek out eco-friendly options (59%), would pay more for a clear conservation benefit (58%) or look for operators with a recognized environmental certification (58%).

None of the market differences on these statements are significant.

Statement	Overall (n=410)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=241)	U.S. Fly (n=65)
I actively seek out eco-friendly or sustainable travel options	59%	45%	55%	61%	61%
I would pay more for a trip that had a clear conservation benefit	58%	46%	50%	61%	61%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	58%	49%	58%	59%	58%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=400 to 410). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

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

All motorcyclists | Traveller types are defined on slide 10

Younger friend groups are more likely than other traveller types to be interested in contributing to wildlife conservation (83%) and in an Indigenous-led guided experience (78%).

Solo riders are the least interested in wildlife conservation (47%) and Indigenous-led experiences (41%).

Statement	Overall (n=410)	Solo (n=43)	Partners (n=73)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=140)
I feel a personal responsibility to protect natural environments I visit	88%	96%	88%	83%	87%	85%
I am interested in contributing to wildlife conservation when I travel	72%	47%	62%	86%	83% ▲	71%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	69%	54%	62%	77%	76%	68%
I would be interested in an Indigenous-led guided experience	64%	41%	60%	77%	78% ▲	57%

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

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=400 to 410). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

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

All motorcyclists | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to agree with each of these statements (78% to 84%), and younger friend groups to pay more for a conservation benefit (71%) and look for certified operators (71%).

Solo riders are less likely to say they would pay more for a trip with a clear conservation benefit (24%).

Statement	Overall (n=410)	Solo (n=43)	Partners (n=73)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=140)
I actively seek out eco-friendly or sustainable travel options	59%	39%	50%	80% ▲	70%	53%
I would pay more for a trip that had a clear conservation benefit	58%	24% ▼	49%	84% ▲	71% ▲	54%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	58%	52%	51%	78% ▲	71% ▲	48%

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

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=400 to 410). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.



AWARENESS & PERCEPTION

AWARENESS OF NORTHERN ONTARIO – MARKET

Motorcyclists who do not live in Northern Ontario

Nearly three-quarters of motorcyclists know a lot (32%) or a little (41%) about Northern Ontario, while 23% have heard of it but know nothing about it and 4% have never heard of it.

U.S. Fly motorcyclists are more likely than other markets to have heard of Northern Ontario but know nothing about it (39%) and less likely to know a little (24%). Ontario motorcyclists are more likely to know a little (64%).

Awareness	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
I have heard of and know a lot about it	32%	32%	23%	34%	33%
I have heard of and know a little bit about it	41%	64% ▲	57%	38%	24% ▼
I have heard of but know nothing about it	23%	0% ▼	17%	23%	39% ▲
I have never heard of before	4%	4%	3%	5%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who do not live in Northern Ontario (n=416). N0 How would you best describe your awareness of Northern Ontario?

AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to know a lot about Northern Ontario (58%), while solo riders are less likely (6%).

Younger families are also less likely to have heard of it but know nothing about it (8%).

Awareness	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
I have heard of and know a lot about it	32%	6% ▼	21%	58% ▲	38%	30%
I have heard of and know a little bit about it	41%	63%	36%	27%	41%	43%
I have heard of but know nothing about it	23%	30%	34%	8% ▼	16%	24%
I have never heard of before	4%	1%	9%	8%	5%	3%

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

Base: motorcyclists who do not live in Northern Ontario (n=416). N0 How would you best describe your awareness of Northern Ontario?

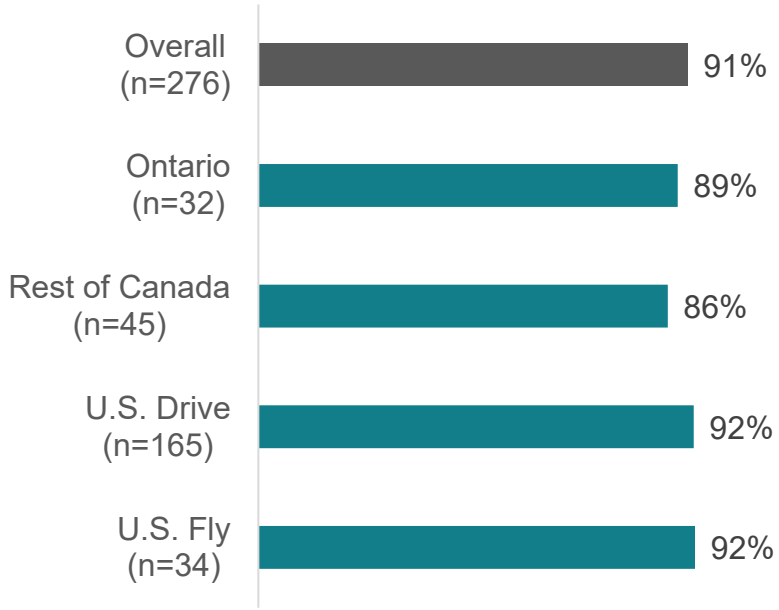
RATING OF NORTHERN ONTARIO FOR MOTORCYCLING

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

Nine in ten motorcyclists who know Northern Ontario (91%) rate it 4 or 5 out of 5 as a pleasure travel destination for motorcycling, including 43% who rate it excellent.

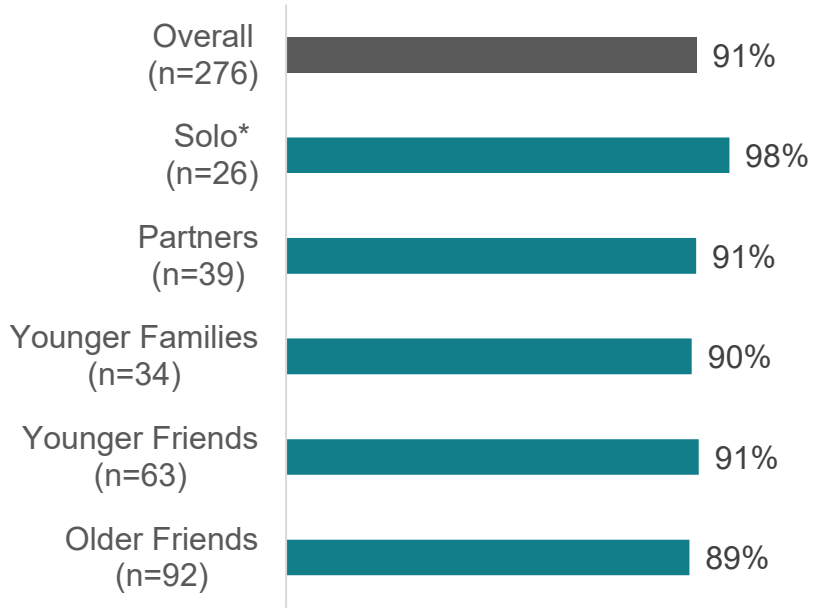
Ratings are high in every market and traveller type (86% to 92%), with no significant differences. The solo rider base is small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: motorcyclists who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=276). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for motorcycling? TOP2 = % rating 4 or 5 (1 = Poor, 5 = Excellent). *Small base (n<30); interpret with caution.

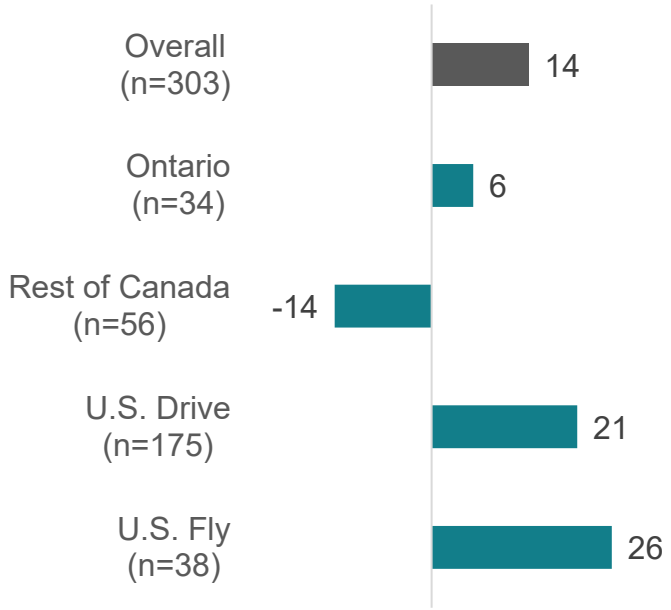
LIKELIHOOD TO RECOMMEND NORTHERN ONTARIO (NPS)

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

Northern Ontario has a Net Promoter Score (NPS) of 14 among motorcyclists who know it, with 40% promoters and 26% detractors.

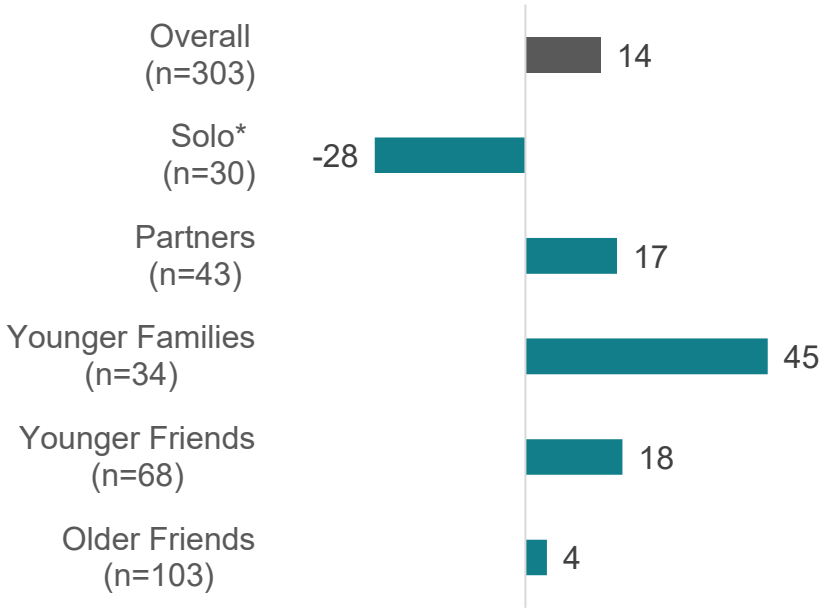
NPS ranges from -14 among Rest of Canada motorcyclists to 26 among U.S. Fly motorcyclists, and from -28 among solo riders to 45 among younger families. None of the differences are significant.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: motorcyclists who know a lot or a little about Northern Ontario (n=303). N2 (NPS) How likely would you be to recommend Northern Ontario to a friend or colleague as a destination for motorcycling? (0 = Not at all likely, 10 = Extremely likely) NPS = % promoters (9–10) minus % detractors (0–6). *Small base (n<30); interpret with caution.

PERCEPTIONS OF NORTHERN ONTARIO – MARKET

Motorcyclists who know a lot or a little about Northern Ontario

Close to nine in ten motorcyclists who know Northern Ontario agree it is a destination they would seriously consider (88%) and that it offers excellent motorcycling experiences (87%).

Fewer agree they know enough to plan a trip (77%) or that Northern Ontario is better than alternatives closer to home (67%). Agreement is lowest among Ontario motorcyclists on most statements, although market differences are not significant.

Statement	Overall (n=290)	Ontario (n=34)	Rest of Canada (n=51)	U.S. Drive (n=170)	U.S. Fly (n=36)
Northern Ontario is a destination I would seriously consider for motorcycling	88%	72%	90%	91%	89%
Northern Ontario offers excellent motorcycling experiences	87%	74%	92%	88%	89%
Northern Ontario feels welcoming to travellers like me	85%	71%	83%	87%	92%
Northern Ontario offers a wide variety of routes, trails, or waterways for motorcycling	84%	72%	86%	86%	82%
I know enough about Northern Ontario to plan a motorcycling trip there	77%	66%	66%	81%	82%
For motorcycling, Northern Ontario is better than alternatives I could choose closer to home	67%	48%	62%	70%	76%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=279 to 290). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

PERCEPTIONS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Younger friend groups are more likely than other traveller types to agree Northern Ontario is better than alternatives closer to home (82%), while older friend groups are less likely (47%).

Agreement with the other statements is similar across traveller types.

Statement	Overall (n=290)	Solo* (n=27)	Partners (n=42)	Younger Families (n=34)	Younger Friends (n=67)	Older Friends (n=100)
Northern Ontario is a destination I would seriously consider for motorcycling	88%	89%	94%	90%	88%	85%
Northern Ontario offers excellent motorcycling experiences	87%	86%	94%	87%	87%	84%
Northern Ontario feels welcoming to travellers like me	85%	93%	88%	90%	84%	79%
Northern Ontario offers a wide variety of routes, trails, or waterways for motorcycling	84%	75%	90%	81%	87%	82%
I know enough about Northern Ontario to plan a motorcycling trip there	77%	75%	73%	83%	82%	74%
For motorcycling, Northern Ontario is better than alternatives I could choose closer to home	67%	76%	71%	78%	82% ▲	47% ▼

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

Base: motorcyclists who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=279 to 290). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

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

WHAT NORTHERN ONTARIO HAS TO OFFER – MARKET

Motorcyclists who know a lot or a little about Northern Ontario

Nine in ten motorcyclists who know Northern Ontario agree it has pristine lakes and waterways (90%) and authentic campfire and wilderness experiences (89%), and 86% agree it has excellent motorcycle touring roads.

Good value for money is the lowest-rated attribute (81%). Rest of Canada motorcyclists rate Indigenous culture and heritage lowest (69%), although market differences are not significant.

Northern Ontario has…	Overall (n=289)	Ontario (n=34)	Rest of Canada (n=52)	U.S. Drive (n=170)	U.S. Fly (n=36)
Pristine lakes and waterways	90%	92%	91%	89%	92%
Authentic campfire and wilderness experiences	89%	82%	88%	90%	95%
Rich Indigenous culture and heritage	88%	90%	69%	91%	96%
Dark skies ideal for stargazing	88%	84%	88%	87%	91%
Remote, untouched wilderness	86%	82%	75%	90%	88%
Excellent motorcycle touring roads	86%	78%	82%	88%	89%
Opportunities to see the Northern Lights (Aurora Borealis)	85%	77%	80%	85%	98%
Friendly and welcoming local communities	85%	79%	90%	83%	91%
Good value for money	81%	69%	73%	85%	79%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=278 to 289). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – TRAVELLER TYPE

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

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

Solo riders give the lowest ratings for Indigenous culture and heritage (54%) and opportunities to see the Northern Lights (60%).

Northern Ontario has…	Overall (n=289)	Solo* (n=30)	Partners (n=41)	Younger Families (n=34)	Younger Friends (n=67)	Older Friends (n=97)
Pristine lakes and waterways	90%	81%	95%	96%	92%	87%
Authentic campfire and wilderness experiences	89%	81%	96%	89%	91%	88%
Rich Indigenous culture and heritage	88%	54%	91%	87%	91%	94%
Dark skies ideal for stargazing	88%	85%	94%	76%	89%	87%
Remote, untouched wilderness	86%	85%	83%	76%	90%	89%
Excellent motorcycle touring roads	86%	74%	88%	84%	85%	86%
Opportunities to see the Northern Lights (Aurora Borealis)	85%	60%	91%	93%	89%	80%
Friendly and welcoming local communities	85%	85%	94%	90%	84%	80%
Good value for money	81%	82%	84%	89%	86%	73%

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

Base: motorcyclists who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=278 to 289). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.
*Small base (n<30); interpret with caution.

VIEW OF A TRIP TO NORTHERN ONTARIO – MARKET

All motorcyclists | Includes past visitors to Northern Ontario

Nearly two-thirds of motorcyclists (64%) view Northern Ontario as a destination of choice for motorcycling, while 30% see it as a destination of convenience.

Rest of Canada motorcyclists are the most likely to see it as a destination of convenience (52%), although market differences are not significant.

View of a trip	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
A destination of choice – somewhere I would specifically seek out for motorcycling	64%	70%	47%	68%	65%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	30%	30%	52%	24%	28%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). N10 Which of the following best describes how you would view a motorcycling trip to Northern Ontario?

"Not sure" (6%) not shown.

VIEW OF A TRIP TO NORTHERN ONTARIO – TRAVELLER TYPE

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

Solo riders are the most likely to see Northern Ontario as a destination of convenience (51%), and younger families the most likely to see it as a destination of choice (72%).

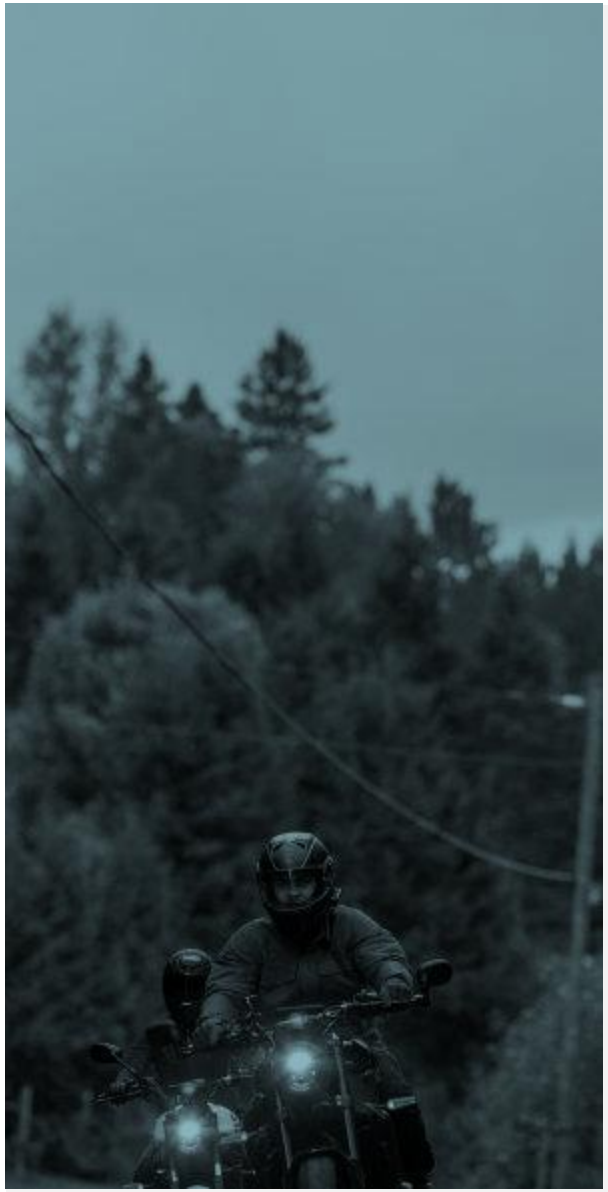
None of the traveller type differences are significant.

View of a trip	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
A destination of choice – somewhere I would specifically seek out for motorcycling	64%	49%	57%	72%	66%	68%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	30%	51%	33%	28%	31%	23%

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

Base: all motorcyclists (n=416). N10 Which of the following best describes how you would view a motorcycling trip to Northern Ontario?

“Not sure” (6%) not shown.



FUTURE DEMAND & EXPERIENCES

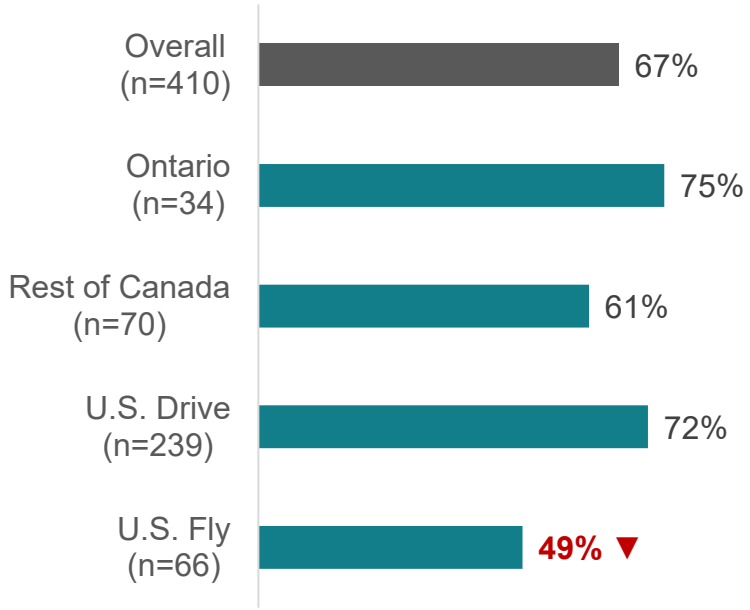
LIKELIHOOD TO VISIT NORTHERN ONTARIO IN THE NEXT 2 YEARS

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

Two-thirds of motorcyclists (67%) are likely to visit Northern Ontario for a motorcycling trip in the next two years, including 36% who are very likely.

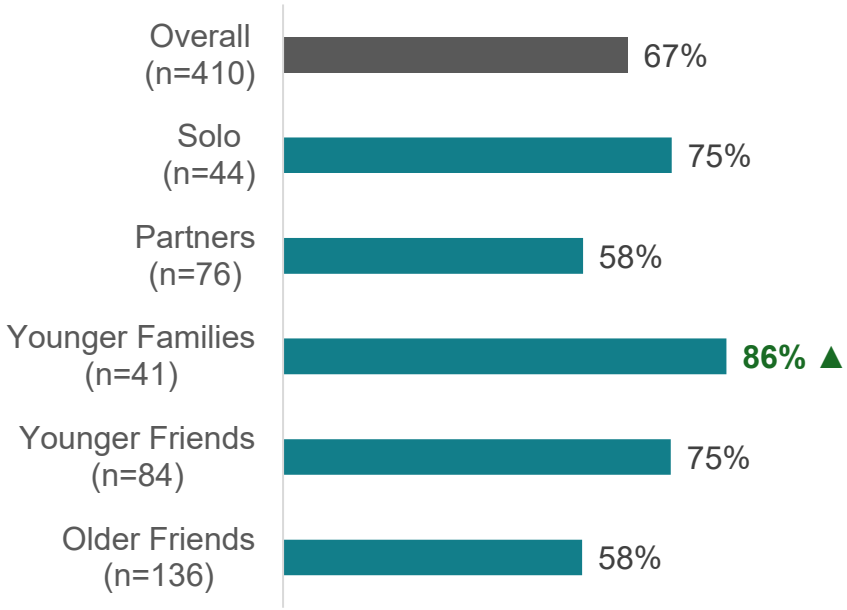
Likelihood is lower among U.S. Fly motorcyclists (49%) than other markets. Younger families are more likely than other traveller types to visit (86%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists, excluding “Don’t know” (n=410). N4 (TOP2) How likely are you to visit Northern Ontario for a motorcycling trip in the next 2 years? TOP2 = % somewhat or very likely.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – MARKET

All motorcyclists | Includes past visitors to Northern Ontario

Half of motorcyclists (48%) would make Northern Ontario the primary destination of a motorcycling trip, with brief stops elsewhere, and about one in five each would make it the only destination (21%) or one of several equal destinations (21%).

Ontario motorcyclists are the most likely to make it the primary destination with brief stops elsewhere (64%), although market differences are not significant.

Role of Northern Ontario	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
It would be the only destination of the trip	21%	12%	11%	24%	22%
It would be the primary destination, with brief stops elsewhere	48%	64%	46%	47%	44%
It would be one of several equal destinations	21%	18%	29%	19%	20%
It would be a secondary stop on a trip focused elsewhere	3%	0%	4%	4%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). N5 If you were to visit Northern Ontario for motorcycling, which of the following best describes the role it would play in your trip?

“Not sure” (8%) not shown.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – TRAVELLER TYPE

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

Younger families are the most likely to make Northern Ontario the only destination of their trip (35%).

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
It would be the only destination of the trip	21%	17%	16%	35%	17%	21%
It would be the primary destination, with brief stops elsewhere	48%	54%	36%	33%	49%	54%
It would be one of several equal destinations	21%	22%	26%	24%	24%	17%
It would be a secondary stop on a trip focused elsewhere	3%	2%	5%	6%	5%	1%

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

Base: all motorcyclists (n=416). N5 If you were to visit Northern Ontario for motorcycling, which of the following best describes the role it would play in your trip?

“Not sure” (8%) not shown.

FACTORS IN DECIDING TO VISIT – MARKET (1 OF 3)

All motorcyclists | Includes past visitors to Northern Ontario

Close to nine in ten motorcyclists say safety and reliability (89%), the quality of routes (89%), the ability to get away from it all (88%), travel time and ease of access (88%) and cost (87%) are important when deciding whether to visit Northern Ontario.

None of the market differences on these factors are significant.

Factor	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Safety and reliability of the destination	89%	95%	81%	90%	93%
Quality/condition of routes, trails, or waterways for motorcycling (e.g., road/trail surface, grooming, water conditions)	89%	85%	92%	89%	88%
Ability to get away from it all	88%	91%	87%	87%	92%
Travel time and ease of access	88%	94%	84%	86%	92%
Cost and overall affordability	87%	90%	82%	87%	95%
Quality of accommodation options	86%	93%	86%	86%	84%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=402 to 412). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for motorcycling? (flattened) TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – MARKET (2 OF 3)

All motorcyclists | Includes past visitors to Northern Ontario

More than eight in ten say each of the next set of factors is important, from connectivity (85%) to reputation or word of mouth (82%).

None of the market differences on these factors are significant.

Factor	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Cell phone or internet connectivity at the destination	85%	87%	90%	82%	90%
Variety and range of motorcycling routes or areas available	84%	87%	76%	85%	86%
More accommodation available during the times I want to visit	83%	85%	81%	84%	81%
Licensing, registration or permit requirements that are clear and manageable	83%	81%	76%	82%	95%
Access to nature and wilderness	83%	84%	87%	83%	76%
Strong reputation or positive word of mouth	82%	82%	69%	84%	85%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=402 to 412). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for motorcycling? (flattened) TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – MARKET (3 OF 3)

All motorcyclists | Includes past visitors to Northern Ontario

Fewer say activity-specific infrastructure (73%), activities for non-motorcycling companions (65%), Indigenous cultural experiences (62%), motorcycling events (56%) or outfitters and guides (50%) are important.

These factors are rated lowest by Rest of Canada motorcyclists, from 31% to 63%, although market differences are not significant.

Factor	Overall (n=412)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	73%	61%	63%	78%	72%
Availability of activities for non-motorcycling travel companions	65%	56%	57%	66%	71%
Indigenous cultural experiences	62%	70%	40%	64%	75%
Motorcycling events or competitions	56%	57%	34%	59%	63%
Availability of outfitters, guides, or operators	50%	39%	31%	53%	62%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=402 to 412). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for motorcycling? (flattened) TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – TRAVELLER TYPE (1 OF 3)

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

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

Solo riders place the least importance on safety and reliability (75%).

Factor	Overall (n=412)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Safety and reliability of the destination	89%	75%	87%	91%	91%	92%
Quality/condition of routes, trails, or waterways for motorcycling (e.g., road/trail surface, grooming, water conditions)	89%	90%	83%	79%	92%	91%
Ability to get away from it all	88%	96%	83%	82%	86%	90%
Travel time and ease of access	88%	94%	85%	80%	93%	84%
Cost and overall affordability	87%	81%	87%	90%	90%	85%
Quality of accommodation options	86%	88%	81%	90%	91%	86%

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

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=402 to 412). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for motorcycling? (flattened) TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – TRAVELLER TYPE (2 OF 3)

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

Ratings of these factors are similar across traveller types, with no significant differences.

Solo riders place the least importance on connectivity (69%), route variety (67%) and reputation (68%).

Factor	Overall (n=412)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Cell phone or internet connectivity at the destination	85%	69%	84%	92%	91%	84%
Variety and range of motorcycling routes or areas available	84%	67%	83%	79%	91%	84%
More accommodation available during the times I want to visit	83%	79%	81%	88%	89%	81%
Licensing, registration or permit requirements that are clear and manageable	83%	92%	83%	75%	86%	81%
Access to nature and wilderness	83%	88%	79%	83%	80%	83%
Strong reputation or positive word of mouth	82%	68%	76%	89%	86%	82%

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

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=402 to 412). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for motorcycling? (flattened) TOP2 = % somewhat or very important.

FACTORS IN DECIDING TO VISIT – TRAVELLER TYPE (3 OF 3)

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

Younger families are more likely than other traveller types to value activities for non-motorcycling companions (90%), outfitters, guides or operators (89%) and motorcycling events (86%).

Younger friend groups also place more importance on Indigenous cultural experiences (77%), events (74%) and outfitters (70%), while older friend groups place less importance on infrastructure (61%) and outfitters (30%).

Factor	Overall (n=412)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	73%	69%	76%	87%	83%	61% ▼
Availability of activities for non-motorcycling travel companions	65%	47%	61%	90% ▲	78%	52%
Indigenous cultural experiences	62%	34%	57%	79%	77% ▲	56%
Motorcycling events or competitions	56%	35%	39%	86% ▲	74% ▲	48%
Availability of outfitters, guides, or operators	50%	42%	42%	89% ▲	70% ▲	30% ▼

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

Base: all motorcyclists, excluding “Don’t know”; bases vary by item (n=402 to 412). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for motorcycling? (flattened) TOP2 = % somewhat or very important.

PREFERRED ACCESS TYPES – MARKET

All motorcyclists

Eight in ten motorcyclists (83%) prefer road-accessible areas for a motorcycling trip to Northern Ontario. About one in five prefer train-in (20%) or fly-in or float plane access (19%), and 16% remote boat-in access.

None of the market differences are significant.

Access type	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Road-accessible areas	83%	87%	80%	84%	77%
Train-in access	20%	27%	17%	20%	23%
Fly-in or float plane access	19%	18%	14%	19%	24%
Remote boat-in access	16%	18%	3%	19%	18%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). N7 For a motorcycling trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (8%) not shown.

PREFERRED ACCESS TYPES – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer remote boat-in (46%) and train-in access (42%).

Older friend groups are less likely to prefer fly-in or float plane access (7%).

Access type	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Road-accessible areas	83%	75%	84%	78%	85%	84%
Train-in access	20%	21%	15%	42% ▲	25%	12%
Fly-in or float plane access	19%	31%	12%	33%	21%	7% ▼
Remote boat-in access	16%	8%	9%	46% ▲	25%	8%

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

Base: all motorcyclists (n=416). N7 For a motorcycling trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (8%) not shown.

PREFERRED LODGING OPTIONS – MARKET

All motorcyclists

Hotels or motels (62%) are the most preferred lodging option for a motorcycling trip to Northern Ontario, followed by short-term rentals (44%), commercial cottage or cabin rentals (38%) and drive-in lodges or resorts (38%).

Hotel or motel preference is highest among U.S. Fly motorcyclists (77%), and short-term rentals among Ontario motorcyclists (63%). None of the market differences are significant.

Lodging option	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Hotel or motel	62%	65%	53%	60%	77%
Short-term rental (e.g., AirBnB, Vrbo)	44%	63%	46%	40%	49%
Commercial cottage or cabin rental	38%	45%	48%	35%	36%
Drive-in lodge or resort	38%	38%	31%	40%	37%
Designated campground (private or provincial park)	35%	29%	46%	33%	35%
Private cottage (owned or borrowed)	28%	36%	25%	29%	24%
Backcountry or wilderness camping	27%	16%	30%	27%	28%
Home of friends or relatives (unpaid)	17%	21%	19%	17%	17%
Fly-in or remote outpost camp	6%	13%	0%	6%	6%
Other	<1%	0%	0%	<1%	0%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). N8 Which of the following lodging options would you prefer on a motorcycling trip to Northern Ontario? Please select all that apply.

"Not sure" (2%) not shown.

PREFERRED LODGING OPTIONS – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Hotels or motels are the top choice for every traveller type, from 44% among solo riders to 68% among older friend groups.

None of the traveller type differences are significant.

Lodging option	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Hotel or motel	62%	44%	57%	61%	64%	68%
Short-term rental (e.g., AirBnB, Vrbo)	44%	34%	36%	35%	58%	47%
Commercial cottage or cabin rental	38%	38%	44%	28%	32%	42%
Drive-in lodge or resort	38%	30%	30%	34%	36%	45%
Designated campground (private or provincial park)	35%	39%	32%	34%	38%	35%
Private cottage (owned or borrowed)	28%	8%	25%	37%	31%	26%
Backcountry or wilderness camping	27%	37%	18%	38%	28%	21%
Home of friends or relatives (unpaid)	17%	6%	10%	34%	20%	13%
Fly-in or remote outpost camp	6%	6%	3%	17%	11%	<1%
Other	<1%	0%	0%	0%	1%	0%

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

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

Base: all motorcyclists (n=416). N8 Which of the following lodging options would you prefer on a motorcycling trip to Northern Ontario? Please select all that apply.

"Not sure" (2%) not shown.

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

Motorcyclists who have visited Northern Ontario in the past 5 years

Better value for money (41%) would most encourage past-five-year visitors to spend more nights in Northern Ontario, followed by more things to do for travel companions (28%), improved road, trail or water access (28%) and events timed to their travel (27%).

Several market bases are small for this question, and none of the market differences are significant.

Factor	Overall (n=211)	Ontario* (n=25)	Rest of Canada (n=40)	U.S. Drive (n=122)	U.S. Fly* (n=24)
Better value for money overall	41%	35%	55%	37%	44%
More things to do beyond motorcycling for my travel companions	28%	30%	33%	24%	35%
Improved road, trail, or water access infrastructure	28%	23%	10%	35%	27%
Events or competitions timed to my travel	27%	19%	31%	27%	27%
Better availability of secure equipment or vehicle storage	26%	14%	7%	33%	39%
More accommodation available during the times I want to visit	26%	28%	18%	27%	26%
Better availability of quality paid accommodation (lodges, hotels, cottages)	24%	11%	9%	29%	37%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

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

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

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

Motorcyclists who have visited Northern Ontario in the past 5 years

About one in five would stay longer with better connectivity (23%), more packaged experiences (22%) or a guided multi-stop itinerary (21%), and 13% are already satisfied with the length of their stays.

None of the market differences are significant.

Factor	Overall (n=211)	Ontario* (n=25)	Rest of Canada (n=40)	U.S. Drive (n=122)	U.S. Fly* (n=24)
Better cell or internet connectivity	23%	35%	8%	23%	35%
More packaged or all-inclusive experiences	22%	22%	8%	25%	32%
A guided multi-stop itinerary combining activities or sub-regions	21%	25%	5%	26%	20%
Indigenous cultural experiences	18%	31%	12%	18%	13%
Other	1%	4%	0%	1%	0%
Nothing – I am already satisfied with the length of my stays	13%	15%	6%	15%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

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

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

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

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

Younger friend groups are more likely than other traveller types to say better availability of quality paid accommodation would encourage longer stays (44%).

Younger families are the most likely to cite better value for money (52%), and younger friend groups improved access infrastructure (43%).

Factor	Overall (n=211)	Solo* (n=25)	Partners* (n=29)	Younger Families (n=33)	Younger Friends (n=50)	Older Friends (n=54)
Better value for money overall	41%	51%	39%	52%	45%	28%
More things to do beyond motorcycling for my travel companions	28%	9%	27%	41%	30%	31%
Improved road, trail, or water access infrastructure	28%	20%	16%	31%	43%	17%
Events or competitions timed to my travel	27%	20%	11%	28%	35%	33%
Better availability of secure equipment or vehicle storage	26%	2%	30%	37%	37%	13%
More accommodation available during the times I want to visit	26%	37%	24%	27%	28%	15%
Better availability of quality paid accommodation (lodges, hotels, cottages)	24%	5%	34%	31%	44% ▲	6%

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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

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

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

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

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

Partners are the most likely to be already satisfied with the length of their stays (26%).

None of the traveller type differences are significant.

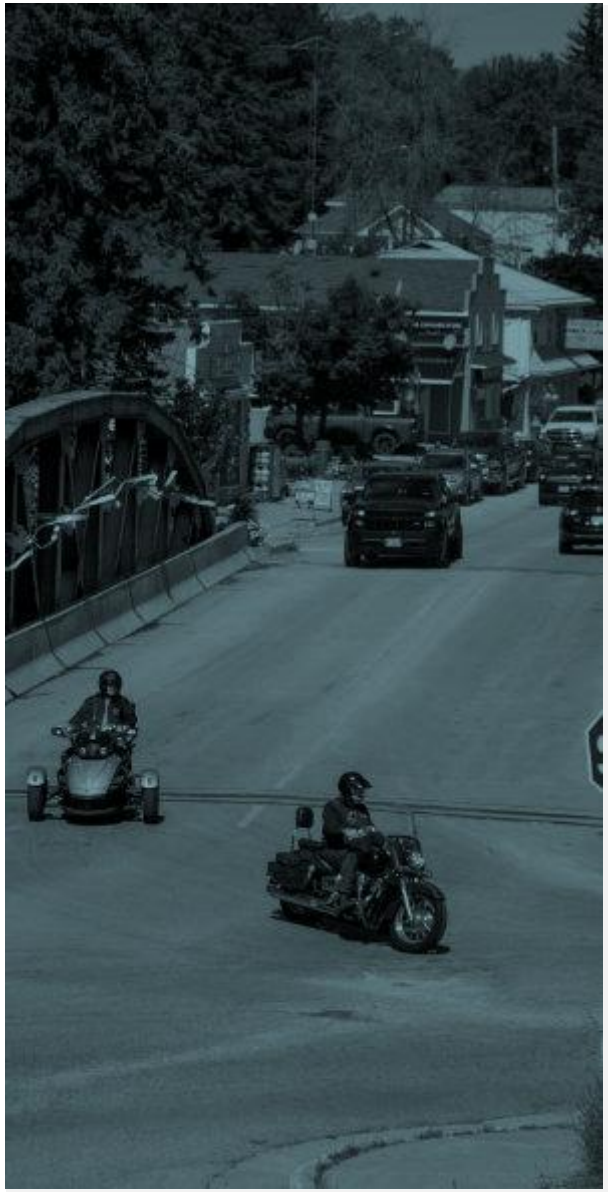
Factor	Overall (n=211)	Solo* (n=25)	Partners* (n=29)	Younger Families (n=33)	Younger Friends (n=50)	Older Friends (n=54)
Better cell or internet connectivity	23%	15%	27%	36%	30%	10%
More packaged or all-inclusive experiences	22%	17%	21%	28%	25%	14%
A guided multi-stop itinerary combining activities or sub-regions	21%	15%	25%	34%	17%	17%
Indigenous cultural experiences	18%	3%	13%	33%	24%	13%
Other	1%	0%	3%	0%	0%	0%
Nothing – I am already satisfied with the length of my stays	13%	12%	26%	4%	8%	15%

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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

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

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



BARRIERS & COMPETITION

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

All motorcyclists | Includes past visitors to Northern Ontario

Unfavourable weather or season timing (37%) and cost (36%) are the most common barriers to visiting or returning to Northern Ontario for motorcycling, followed by poor road, trail or water access (32%).

Rest of Canada motorcyclists are the most concerned about cost (54%) and wildfires and other environmental disruptions (52%), although market differences on this slide are not significant.

Barrier	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Unfavourable weather or season timing	37%	38%	41%	37%	35%
Cost	36%	41%	54%	30%	37%
Poor road, trail, or water access	32%	42%	28%	35%	20%
Wildfires, flooding, or other environmental disruptions	29%	36%	52%	25%	14%
Poor value for money	29%	33%	35%	27%	28%
High transportation costs (gas, airfare)	29%	39%	23%	29%	28%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for motorcycling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

All motorcyclists | Includes past visitors to Northern Ontario

About a quarter of motorcyclists are discouraged by poor connectivity, complicated licensing, limited accommodation, expensive licensing or safety concerns (25% to 27%), and 23% by unclear regulations.

Ontario motorcyclists are the most likely to cite limited accommodation options (43%), although market differences are not significant.

Barrier	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Poor or unreliable cell phone or internet connectivity	27%	21%	27%	28%	27%
Complicated licensing, registration, or permit requirements	27%	10%	36%	28%	21%
Limited accommodation options	27%	43%	32%	23%	27%
Expensive licensing, registration, or permit requirements	26%	21%	27%	25%	29%
Concerns about safety	25%	27%	13%	28%	27%
Unfamiliar or unclear regulations	23%	19%	22%	24%	26%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for motorcycling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

All motorcyclists | Includes past visitors to Northern Ontario

About one in five motorcyclists are discouraged by lack of amenities (21%), distance (20%) or insects (20%), and 17% say they do not know enough about Northern Ontario's motorcycling opportunities.

U.S. Drive motorcyclists are less likely than other markets to say Northern Ontario is too far to drive (13%). Among U.S. riders, about a quarter cite anti-American sentiment (27% of U.S. Drive and 23% of U.S. Fly) and border-crossing concerns (22% and 25%).

Barrier	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Lack of amenities or services at the destination	21%	20%	31%	17%	24%
Too far to drive	20%	13%	35%	13% ▼	35%
Insects (e.g., blackflies, mosquitoes)	20%	19%	33%	18%	15%
Anti-American sentiment	20%	–	–	27%	23%
I do not know enough about Northern Ontario's motorcycling opportunities	17%	7%	25%	16%	20%
Concerns about crossing the Canada-US border	17%	–	–	22%	25%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for motorcycling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

All motorcyclists | Includes past visitors to Northern Ontario

Fewer than one in five motorcyclists are discouraged by each of the barriers on this slide, led by remoteness (16%) and vehicle registration requirements (15%).

None of the market differences are significant.

Barrier	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Too remote or rugged for my comfort level	16%	17%	21%	14%	15%
Vehicle registration or insurance requirements across jurisdictions	15%	5%	10%	16%	22%
Difficulty finding reliable trip planning information	14%	16%	11%	16%	11%
Availability of campsites or RV sites	14%	15%	22%	13%	9%
Lack of secure equipment or vehicle storage	14%	14%	7%	17%	10%
Not sure the motorcycling quality would meet my expectations	8%	10%	16%	7%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for motorcycling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

Older friend groups are the most likely to be discouraged by unfavourable weather (46%) and poor access (40%), and solo riders by cost (50%).

None of the traveller type differences are significant.

Barrier	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Unfavourable weather or season timing	37%	41%	35%	24%	36%	46%
Cost	36%	50%	39%	34%	33%	31%
Poor road, trail, or water access	32%	40%	37%	19%	23%	40%
Wildfires, flooding, or other environmental disruptions	29%	41%	21%	14%	23%	39%
Poor value for money	29%	26%	35%	10%	30%	32%
High transportation costs (gas, airfare)	29%	27%	31%	23%	25%	29%

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

Base: all motorcyclists (n=416). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for motorcycling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

Barriers on this slide are cited by 39% or fewer of every traveller type, with no significant differences.

Solo riders are the most likely to cite complicated licensing requirements (39%) and unclear regulations (33%).

Barrier	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Poor or unreliable cell phone or internet connectivity	27%	17%	27%	17%	26%	33%
Complicated licensing, registration, or permit requirements	27%	39%	17%	12%	21%	37%
Limited accommodation options	27%	18%	25%	15%	25%	36%
Expensive licensing, registration, or permit requirements	26%	29%	27%	18%	21%	28%
Concerns about safety	25%	21%	29%	21%	33%	23%
Unfamiliar or unclear regulations	23%	33%	26%	26%	25%	19%

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

Base: all motorcyclists (n=416). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for motorcycling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

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

Solo riders are the most likely to say they do not know enough about Northern Ontario's motorcycling opportunities (30%).

None of the traveller type differences are significant.

Barrier	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Lack of amenities or services at the destination	21%	18%	23%	7%	13%	26%
Too far to drive	20%	22%	20%	10%	23%	20%
Insects (e.g., blackflies, mosquitoes)	20%	4%	25%	14%	13%	25%
Anti-American sentiment	20%	10%	22%	9%	19%	24%
I do not know enough about Northern Ontario's motorcycling opportunities	17%	30%	15%	7%	7%	26%
Concerns about crossing the Canada-US border	17%	8%	29%	9%	14%	15%

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

Base: all motorcyclists (n=416). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for motorcycling? Please select all that apply.

"Not sure" (6%) not shown.

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

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

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

Solo riders are the most likely to find Northern Ontario too remote or rugged for their comfort level (30%).

None of the traveller type differences are significant.

Barrier	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Too remote or rugged for my comfort level	16%	30%	14%	5%	11%	18%
Vehicle registration or insurance requirements across jurisdictions	15%	19%	18%	15%	16%	13%
Difficulty finding reliable trip planning information	14%	15%	11%	15%	17%	13%
Availability of campsites or RV sites	14%	22%	11%	11%	15%	15%
Lack of secure equipment or vehicle storage	14%	15%	8%	12%	16%	17%
Not sure the motorcycling quality would meet my expectations	8%	8%	7%	7%	9%	11%

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

Base: all motorcyclists (n=416). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for motorcycling? Please select all that apply.

"Not sure" (6%) not shown.

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

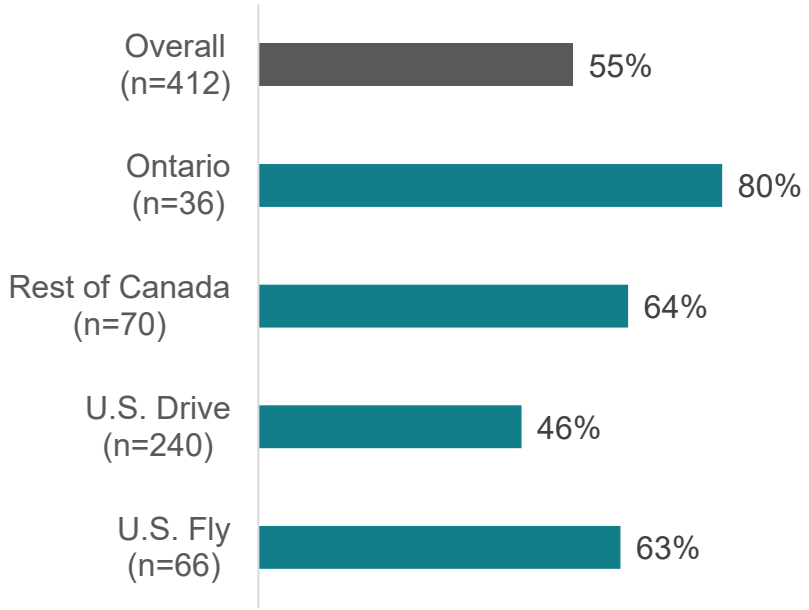
IMPACT OF FINANCIAL PRESSURES ON TRAVEL PLANS

All motorcyclists | Traveller types are defined on slide 10

More than half of motorcyclists (55%) agree that financial pressures have impacted their travel plans in the next 12 months.

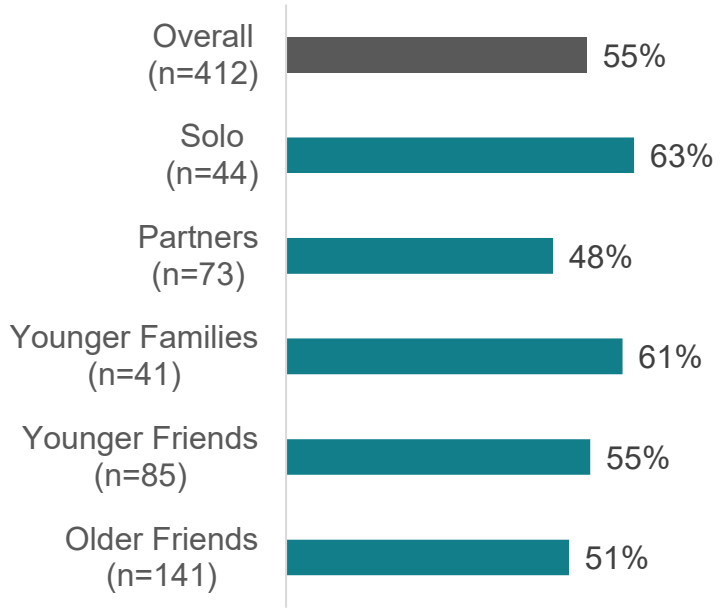
Agreement ranges from 46% among U.S. Drive motorcyclists to 80% among Ontario motorcyclists, and from 48% among partners to 63% among solo riders, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists, excluding “Don’t know” (n=412). BD1A (TOP2) How much do you agree or disagree with the following statement? "Financial pressures have impacted my travel plans in the next 12 months" TOP2 = % somewhat or strongly agree.

OTHER DESTINATIONS CONSIDERED – MARKET (1 OF 2)

All motorcyclists

Colorado (30%), California (26%) and Texas (24%) are the destinations motorcyclists most often consider instead of Northern Ontario, followed by Michigan (23%) and British Columbia (21%).

U.S. Fly motorcyclists most often consider Colorado (54%), Texas (50%) and California (48%), and U.S. Drive motorcyclists Michigan (34%).

Rest of Canada motorcyclists are more likely than other markets to consider British Columbia (47%), and Ontario motorcyclists Quebec (41%) and somewhere else in Ontario (46%).

Destination	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Colorado	30%	–	–	37%	54%
California	26%	–	–	31%	48%
Texas	24%	–	–	28%	50%
Michigan	23%	–	–	34%	17%
British Columbia	21%	36%	47% ▲	13% ▼	12%
New York	19%	–	–	25%	27%
Pennsylvania	18%	–	–	26%	18%
Wisconsin	18%	–	–	26%	19%
Quebec	18%	41% ▲	34%	12% ▼	10%
Somewhere else in Ontario	17%	46% ▲	15%	15%	13%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). BD2 What other destinations do you consider for motorcycling trips?

"Not sure" (3%) not shown.

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

OTHER DESTINATIONS CONSIDERED – MARKET (2 OF 2)

All motorcyclists

Fewer than one in five motorcyclists consider each of the remaining destinations.

Rest of Canada motorcyclists are more likely than other markets to consider Alberta (36%) and Manitoba (24%).

Destination	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
Alberta	17%	28%	36% ▲	12%	10%
Ohio	16%	–	–	21%	21%
Minnesota	15%	–	–	21%	17%
New Jersey	12%	–	–	16%	17%
Illinois	11%	–	–	14%	15%
Indiana	10%	–	–	13%	15%
Manitoba	9%	14%	24% ▲	5% ▼	8%
Saskatchewan	9%	16%	11%	8%	3%
Other	11%	23%	21%	7%	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). BD2 What other destinations do you consider for motorcycling trips?

"Not sure" (3%) not shown.

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

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (1 OF 2)

All motorcyclists | Traveller types are defined on slide 10

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

Solo riders are the most likely to consider British Columbia (39%).

Destination	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Colorado	30%	11%	36%	29%	44%	28%
California	26%	8%	25%	30%	35%	24%
Texas	24%	12%	37%	24%	31%	21%
Michigan	23%	7%	26%	26%	27%	25%
British Columbia	21%	39%	17%	23%	22%	14%
New York	19%	8%	22%	27%	30%	12%
Pennsylvania	18%	10%	22%	22%	21%	14%
Wisconsin	18%	4%	17%	10%	21%	21%
Quebec	18%	21%	21%	23%	19%	12%
Somewhere else in Ontario	17%	14%	12%	30%	21%	16%

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

Base: all motorcyclists (n=416). BD2 What other destinations do you consider for motorcycling trips?

"Not sure" (3%) not shown.

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

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (2 OF 2)

All motorcyclists | Traveller types are defined on slide 10

Younger friend groups are less likely than other traveller types to name another destination (3%).

Consideration of each remaining Canadian destination is 28% or lower for every traveller type.

Destination	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
Alberta	17%	28%	11%	15%	16%	18%
Ohio	16%	3%	20%	12%	23%	11%
Minnesota	15%	6%	10%	13%	22%	18%
New Jersey	12%	8%	10%	14%	16%	8%
Illinois	11%	11%	12%	9%	16%	7%
Indiana	10%	4%	12%	16%	15%	6%
Manitoba	9%	23%	7%	9%	8%	9%
Saskatchewan	9%	4%	10%	17%	9%	4%
Other	11%	15%	14%	0%	3% ▼	18%

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

Base: all motorcyclists (n=416). BD2 What other destinations do you consider for motorcycling trips?

"Not sure" (3%) not shown.

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

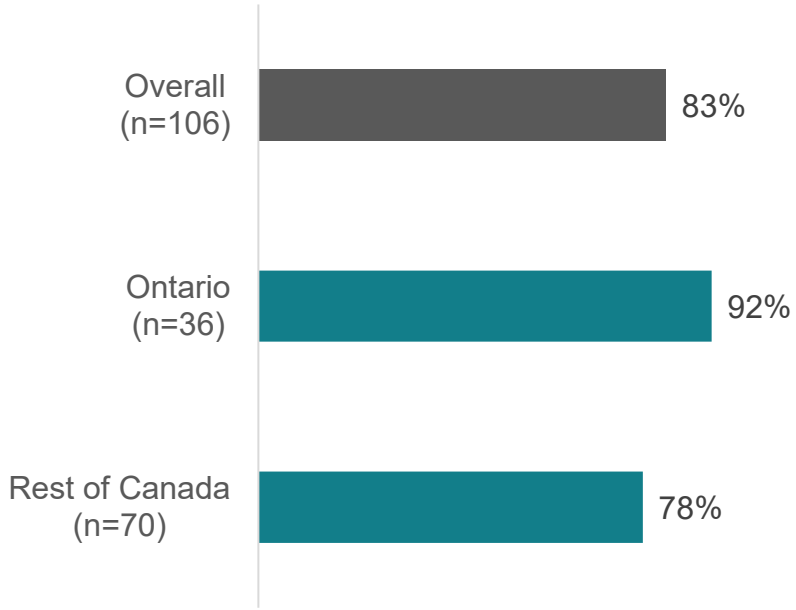
POLITICAL CLIMATE AND CHOOSING NORTHERN ONTARIO

Canadian motorcyclists | Traveller types are defined on slide 10

More than eight in ten Canadian motorcyclists (83%) are more likely to choose Northern Ontario over the United States because of the current political climate in the U.S., including 63% who strongly agree.

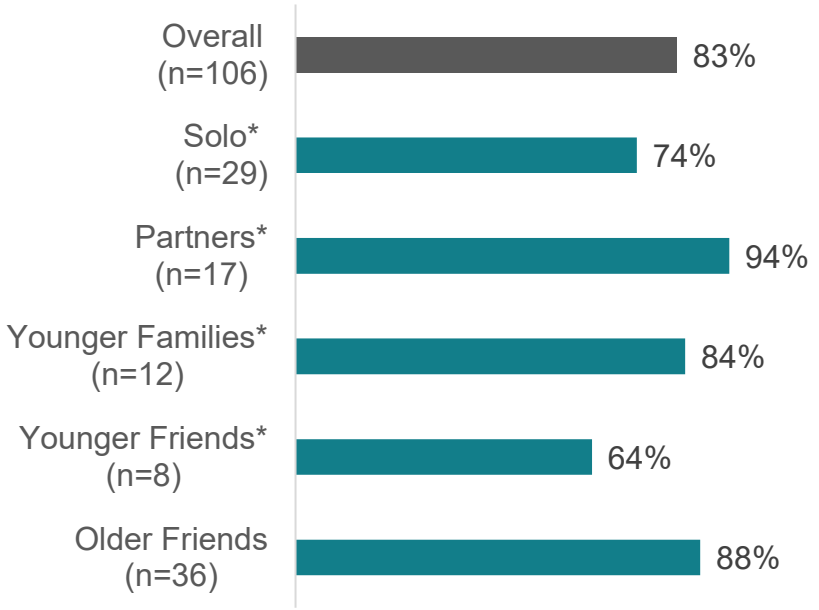
Agreement is 92% among Ontario motorcyclists and 78% among Rest of Canada motorcyclists. Most traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian motorcyclists, excluding “Don’t know” (n=106). BD3A (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of the current political climate in the U.S.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

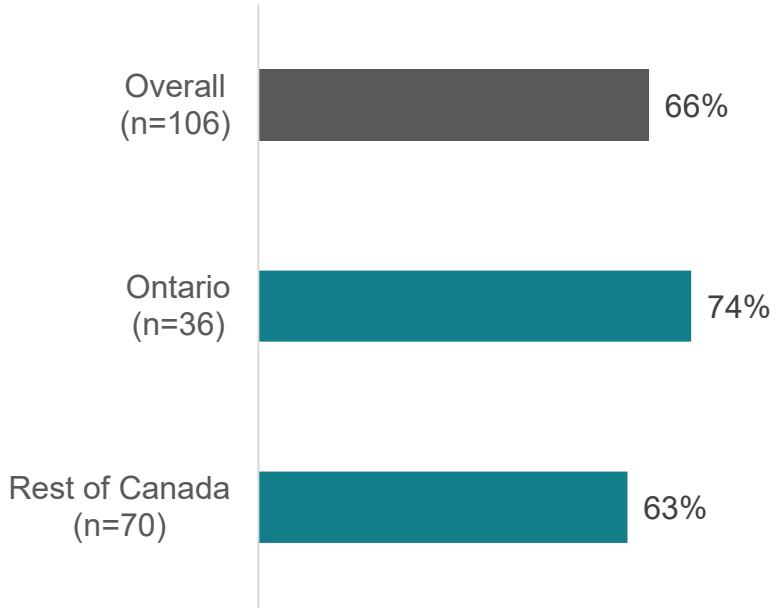
EXCHANGE RATES AND CHOOSING NORTHERN ONTARIO

Canadian motorcyclists | Traveller types are defined on slide 10

Two-thirds of Canadian motorcyclists (66%) are more likely to choose Northern Ontario over the United States because of unfavourable exchange rates.

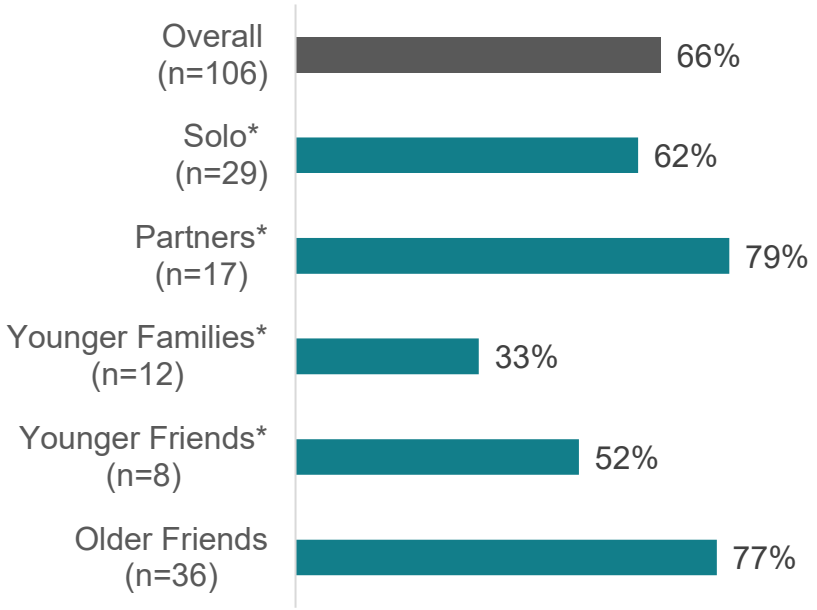
Agreement is 74% among Ontario motorcyclists and 63% among Rest of Canada motorcyclists. Most traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian motorcyclists, excluding “Don’t know” (n=106). BD3B (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of unfavourable exchange rates.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

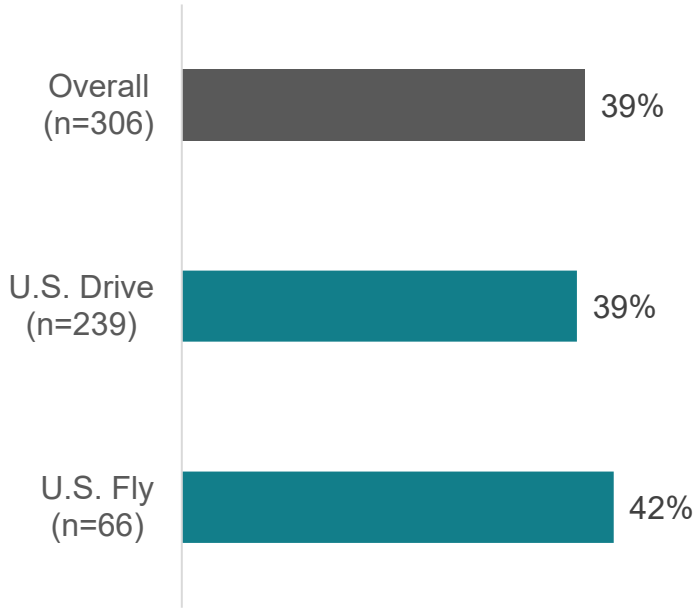
CONCERN ABOUT CROSSING THE BORDER INTO CANADA

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

Four in ten U.S. motorcyclists (39%) are concerned about crossing the border to enter Canada, while 44% are not concerned.

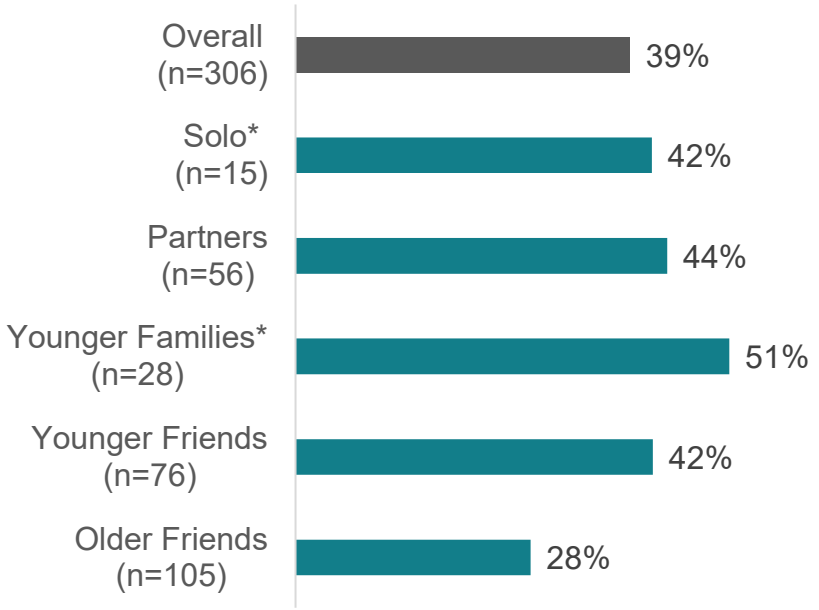
Concern is 39% among U.S. Drive motorcyclists and 42% among U.S. Fly motorcyclists, and ranges from 28% among older friend groups to 51% among younger families, with no significant differences. The solo rider and younger family bases are small.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. motorcyclists, excluding “Don’t know” (n=306). BD4A (TOP2) [I am concerned about crossing the border to enter Canada.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

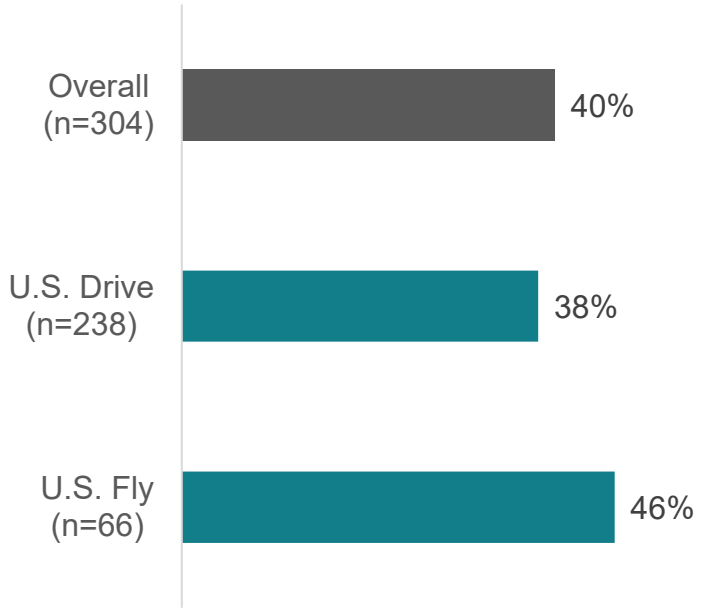
CONCERN ABOUT RETURNING TO THE U.S.

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

Four in ten U.S. motorcyclists (40%) are concerned about crossing the border when returning to the U.S. from Canada.

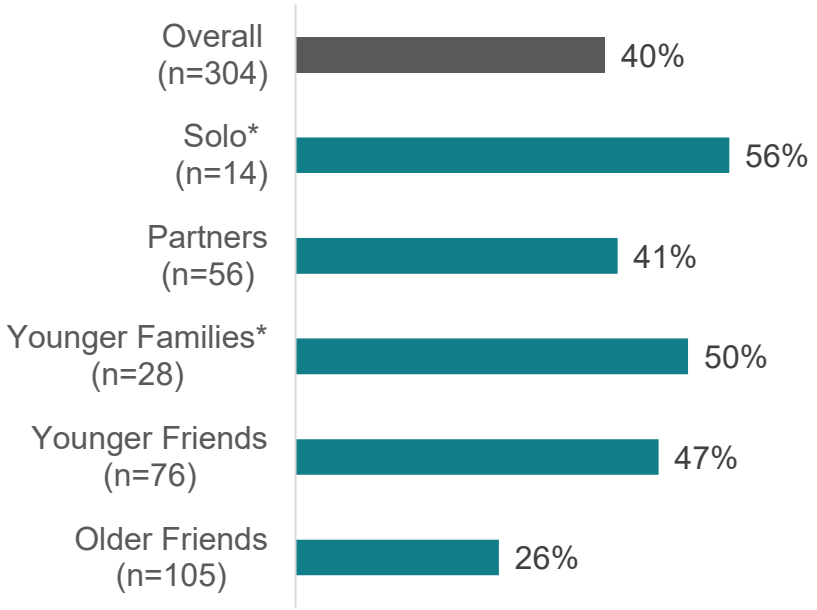
Concern is 38% among U.S. Drive motorcyclists and 46% among U.S. Fly motorcyclists, and lowest among older friend groups (26%). The solo rider and younger family bases are small.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. motorcyclists, excluding “Don’t know” (n=304). BD4B (TOP2) [I am concerned about crossing the border returning to the US from Canada.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.