CONTEXT RESEARCH GROUP

CONTEXT IS EVERYTHING

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

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

October 16th, 2026

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KEY OBJECTIVES

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

Objectives:
The objectives of this survey are to evaluate:

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



METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:
- 30 to 64 years old
- Participated in 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
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 (this 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 All Motorcyclists 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 – PAST VISITORS: WHO THEY ARE & WHAT THEY DID

PAST NORTHERN ONTARIO VISITORS - AVID MOTORCYCLISTS

Half of motorcyclists have ridden in Northern Ontario in the past five years, and they are younger, committed riders. Past visitors are mostly U.S. Drive (58%) and Rest of Canada (19%) riders, with Ontario (12%) and U.S. Fly (11%) riders making up the rest. More than half (54%) are aged 30 to 44, 69% have children at home and 49% belong to a club. More than half (54%) strongly agree motorcycling is central to who they are, they take 4.9 riding trips a year, 54% know a lot about Northern Ontario, and 47% have used a certified touring route or passport program. (See slides 18, 56, 78, 80)

Their trips are multi-day touring trips in paid lodging. Visitors have made an average of 3.0 riding trips to Northern Ontario in five years, mostly in summer (66%) and spring (20%). Their most recent trip lasted 4.6 nights and 86% stayed in paid roofed lodging, most often hotels or motels (52%). On that trip, 41% rented equipment and 41% bought a packaged experience. For most, Northern Ontario was the primary and only destination (45%) or the main destination with brief stops (40%). (See slides 17, 23, 25, 26, 28, 30, 32)

They rate the experience highly and would stay longer for better value. Three-quarters (76%) rated their trip better than riding elsewhere, including 45% much better. Nearly half (47%) are taking more trips than 10 years ago. Better value (41%), more for companions to do (28%), improved access (28%) and events timed to their travel (27%) would extend their stays. (See slides 19, 20, 34, and slides 141–144 of the All Motorcyclists report)



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

PAST NORTHERN ONTARIO VISITORS - AVID MOTORCYCLISTS

Past visitors are more committed and better connected riders. More past visitors than motorcyclists overall strongly agree that motorcycling is central to who they are (54% vs. 47%), belong to a club (49% vs. 36%), have children at home (69% vs. 56%) and have used a certified touring route (47% vs. 34%). They take more riding trips a year (4.9 vs. 4.3) and are more likely to mix guided and self-guided riding (37% vs. 26%). (See slides 36, 54, 56, 80)

Past visitors know the region far better and see fewer barriers, suggesting many barriers are perceptions. More than half of past visitors (54%) know a lot about Northern Ontario, against 32% of motorcyclists overall, and only 5% say they do not know enough about riding there, against 17% overall. Past visitors are less likely to cite weather (29% vs. 37%), poor road access (23% vs. 32%), poor value (19% vs. 29%) and cost (31% vs. 36%). (See slides 42, 43, 46, 78)

Past visitors ride for the riding itself, while motorcyclists overall look more for escape and scenery. Past visitors are less motivated than motorcyclists overall by escape (55% vs. 68%) and new places (51% vs. 62%), and less drawn to scenic driving (43% vs. 52%) and Northern Lights viewing (42% vs. 47%). They make more use of AI tools to plan (30% vs. 23%) and less of word of mouth (44% vs. 55%) and internet search (36% vs. 47%). Almost all past visitors (92%) are likely to visit again in the next two years, against 67% overall. (See slides 40, 60, 61, 88)



EXECUTIVE SUMMARY – SUB-REGIONAL PATTERNS

PAST NORTHERN ONTARIO VISITORS - AVID MOTORCYCLISTS

Riders spread evenly across the five regions, so each region plays a different role. Between 20% and 23% of motorcyclists have visited each region, led by Algoma Country (23%). Regional differences centre on season, cost, operator use and lodging rather than reach. (See slide 21)

Sunset Country: protect strong advocacy by addressing cost. Riders who visited Sunset Country give the highest Net Promoter Score of any region (+62, against +41 in The Great Canadian Wilderness), but cite cost more than other region visitors (41%) and are the most independent (69% use no local operators). The practical priority is value-led offers, such as bundled lodging and route packages, supported by self-guided route information rather than guided products.

The Great Canadian Wilderness: the gateway for spring and operator-supported riding. Visitors are more likely to have ridden in spring (30%) and to use local operators (51%, against 31% overall). The practical priority is spring-season routes and operator partnerships, such as rentals and guided day rides, close to southern markets.

Northeast Ontario: build shoulder-season touring. Northeast visitors are more likely to prefer spring (72%) and fall riding (64%). The practical priority is promoting spring and fall touring loops and making sure services and accommodation are open in the shoulder seasons.

Algoma Country: support hotel-based route touring. Algoma visitors are more likely to prefer hotels or motels (68%), and secure storage would extend stays for a quarter of riders overall (26%). The practical priority is motorcycle-friendly hotels along touring routes, with secure parking and storage, linked into multi-day itineraries.



PAST EXPERIENCE

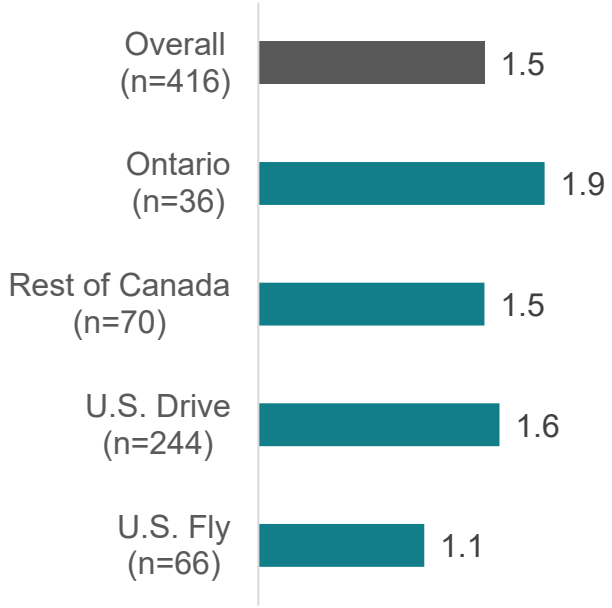
NORTHERN ONTARIO MOTORCYCLING TRIPS IN THE PAST 5 YEARS

All motorcyclists | Traveller types are defined on slide 10

Motorcyclists have taken an average of 1.5 motorcycling trips to Northern Ontario in the past five years.

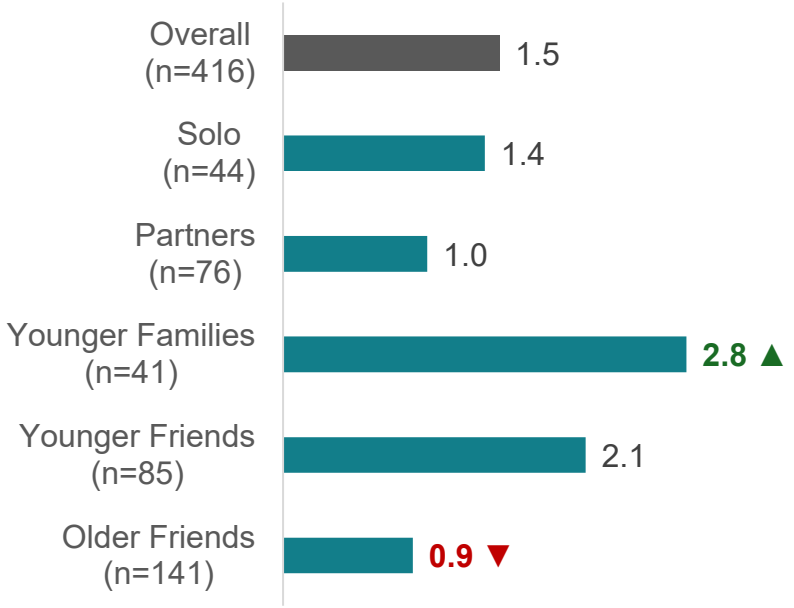
Younger families take more trips than other traveller types (2.8), while older friend groups take fewer (0.9). Among markets, averages range from 1.1 among U.S. Fly motorcyclists to 1.9 among Ontario motorcyclists, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists (n=416). P1 (AVG) In the past 5 years, how many times have you visited Northern Ontario for a motorcycling trip? AVG = average number of trips among all motorcyclists, including those who have not visited.

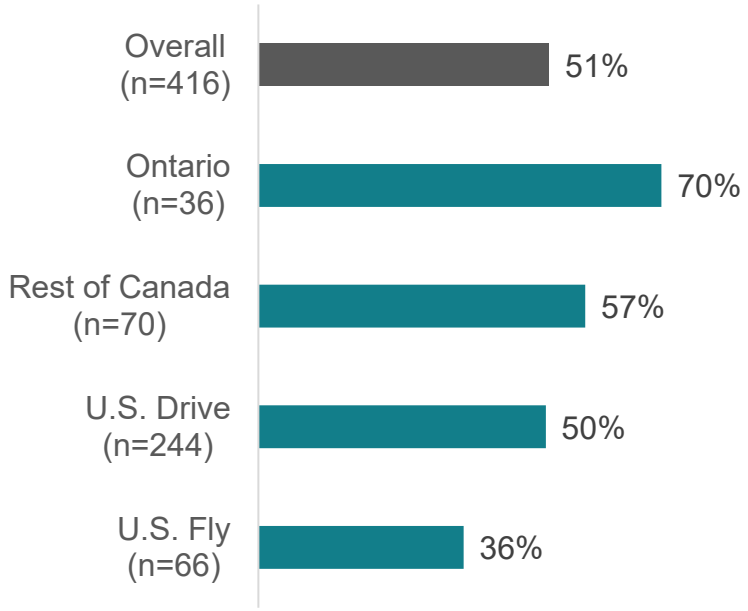
VISITED NORTHERN ONTARIO FOR MOTORCYCLING IN THE PAST 5 YEARS

All motorcyclists | Traveller types are defined on slide 10

Half of motorcyclists (51%) have visited Northern Ontario for a motorcycling trip in the past five years.

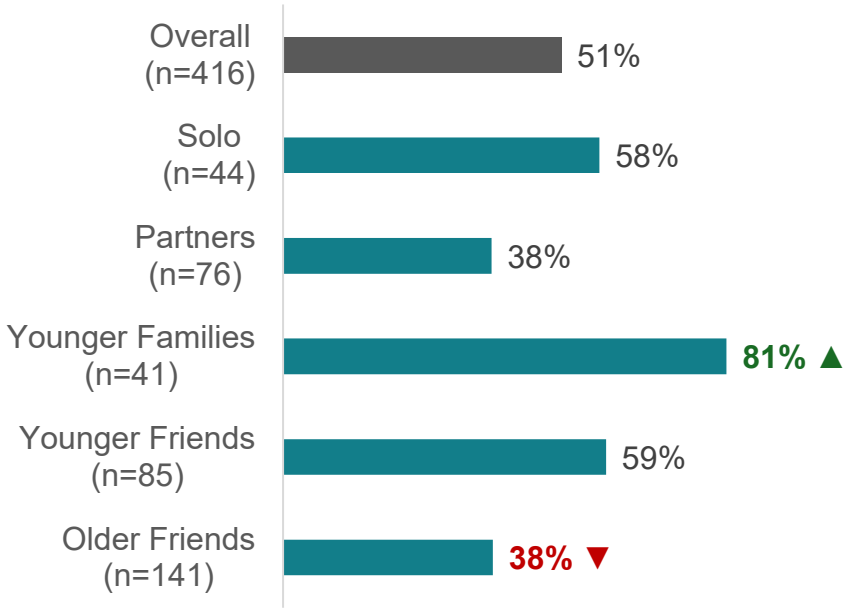
Visits range from 36% among U.S. Fly motorcyclists to 70% among Ontario motorcyclists. Younger families are more likely than other traveller types to have visited (81%), while older friend groups are less likely (38%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all motorcyclists (n=416). P1 (NET: At least once) In the past 5 years, how many times have you visited Northern Ontario for a motorcycling trip? % who have visited at least once shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – MARKET

Motorcyclists who have visited Northern Ontario in the past 5 years

Nearly half of past-five-year visitors (47%) take more motorcycling trips in Northern Ontario than they did 10 years ago, and 43% take about the same number. Few (7%) take fewer.

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

Change in trips	Overall (n=211)	Ontario* (n=25)	Rest of Canada (n=40)	U.S. Drive (n=122)	U.S. Fly* (n=24)
I take more trips than I did 10 years ago	47%	54%	37%	46%	63%
About the same as 10 years ago	43%	40%	61%	40%	31%
I take fewer trips than I did 10 years ago	7%	2%	2%	10%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P1B Compared to 10 years ago, how has your participation in motorcycling trips in Northern Ontario changed?

"Not sure" (2%) not shown.

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

CHANGE IN TRIPS VS. 10 YEARS AGO – TRAVELLER TYPE

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

Younger families are the most likely to be taking more trips than 10 years ago (68%), and older friend groups the least likely (25%).

None of the traveller type differences are significant.

Change in trips	Overall (n=211)	Solo* (n=25)	Partners* (n=29)	Younger Families (n=33)	Younger Friends (n=50)	Older Friends (n=54)
I take more trips than I did 10 years ago	47%	46%	54%	68%	51%	25%
About the same as 10 years ago	43%	53%	43%	28%	34%	59%
I take fewer trips than I did 10 years ago	7%	1%	2%	4%	11%	9%

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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P1B Compared to 10 years ago, how has your participation in motorcycling trips in Northern Ontario changed?

"Not sure" (2%) not shown.

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

PARTS OF NORTHERN ONTARIO VISITED – MARKET

All motorcyclists

About one in five motorcyclists have visited each part of Northern Ontario, from 20% for Northeast Ontario to 23% for Algoma Country.

Ontario motorcyclists are the most likely to have visited Northeast Ontario (40%), the Great Canadian Wilderness (39%) and Superior Country (34%), although market differences are not significant.

Region	Overall (n=416)	Ontario (n=36)	Rest of Canada (n=70)	U.S. Drive (n=244)	U.S. Fly (n=66)
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	23%	25%	35%	21%	16%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	21%	39%	18%	21%	18%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	21%	34%	21%	21%	16%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	21%	19%	29%	19%	21%
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	20%	40%	10%	21%	16%

▲ / ▼ Significantly higher / lower than the other markets

Base: all motorcyclists (n=416). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. “Not sure” (<1%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to have visited four of the five regions, from 41% for Superior Country to 47% for the Great Canadian Wilderness.

Partners are the least likely to have visited Algoma Country (10%).

Region	Overall (n=416)	Solo (n=44)	Partners (n=76)	Younger Families (n=41)	Younger Friends (n=85)	Older Friends (n=141)
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	23%	23%	10%	43% ▲	25%	20%
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	21%	22%	13%	47% ▲	19%	14%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	21%	15%	15%	41% ▲	25%	17%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	21%	20%	16%	46% ▲	21%	14%
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	20%	17%	17%	28%	25%	12%

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

Base: all motorcyclists (n=416). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. “Not sure” (<1%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – MARKET

Motorcyclists who have visited Northern Ontario in the past 5 years

Two-thirds of past-five-year visitors (66%) took their most recent Northern Ontario motorcycling trip in summer, followed by spring (20%), fall (10%) and winter (5%).

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

Season	Overall (n=211)	Ontario* (n=25)	Rest of Canada (n=40)	U.S. Drive (n=122)	U.S. Fly* (n=24)
Winter (December – February)	5%	6%	3%	3%	18%
Spring (March – May)	20%	13%	23%	20%	23%
Summer (June – August)	66%	75%	72%	64%	51%
Fall (September – November)	10%	7%	2%	13%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P3 Thinking about your most recent Northern Ontario trip that involved motorcycling, in what season did that trip take place?
"Not sure" (0%) not shown.
*Small base (n<30); interpret with caution.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – TRAVELLER TYPE

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

Older friend groups are more likely than other traveller types to have travelled in summer (91%), while younger families are less likely (43%) and more likely to have travelled in winter (20%).

Solo and partner visitor bases are small for this question.

Season	Overall (n=211)	Solo* (n=25)	Partners* (n=29)	Younger Families (n=33)	Younger Friends (n=50)	Older Friends (n=54)
Winter (December – February)	5%	0%	2%	20% ▲	2%	0%
Spring (March – May)	20%	33%	22%	26%	24%	9%
Summer (June – August)	66%	66%	65%	43% ▼	58%	91% ▲
Fall (September – November)	10%	1%	10%	11%	17%	0%

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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P3 Thinking about your most recent Northern Ontario trip that involved motorcycling, in what season did that trip take place?
"Not sure" (0%) not shown.
*Small base (n<30); interpret with caution.

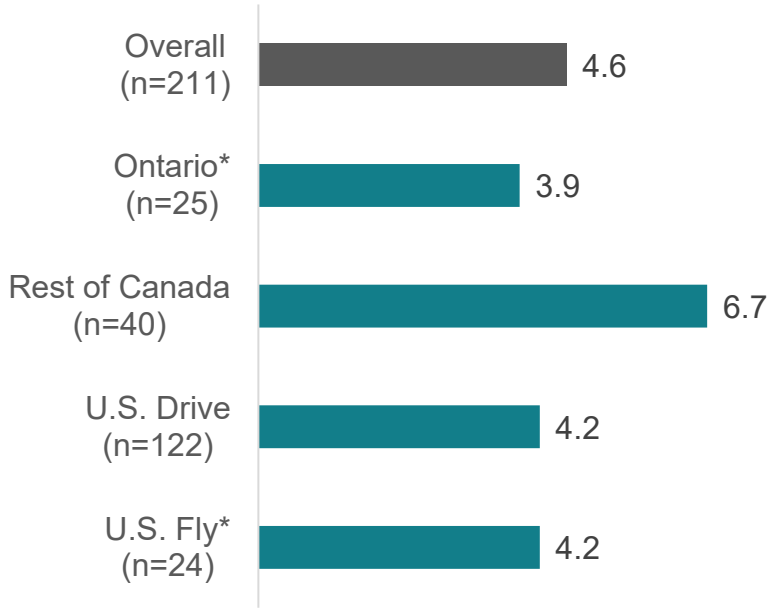
LENGTH OF MOST RECENT NORTHERN ONTARIO TRIP

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

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

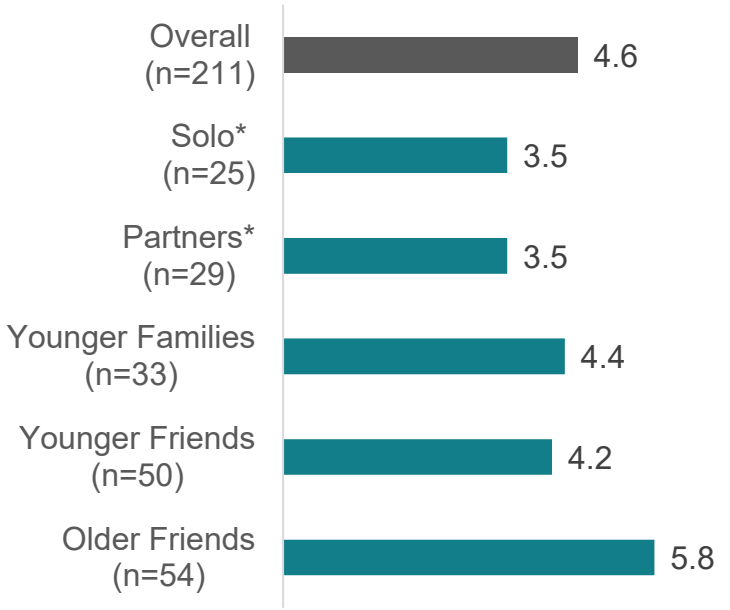
Trip length ranges from 3.9 nights among Ontario visitors to 6.7 among Rest of Canada visitors, and from 3.5 nights among solo riders and partners to 5.8 among older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P4 (AVG) Thinking about your most recent Northern Ontario trip that involved motorcycling, how long was that trip (total nights away from home)? AVG = average number of nights. *Small base (n<30); interpret with caution.

ACCOMMODATION ON MOST RECENT TRIP – MARKET

Motorcyclists who have visited Northern Ontario in the past 5 years

Half of past-five-year visitors (52%) stayed in a hotel or motel on their most recent Northern Ontario motorcycling trip, followed by short-term rentals (27%), drive-in lodges or resorts (21%) and backcountry or wilderness camping (20%).

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

Accommodation	Overall (n=211)	Ontario* (n=25)	Rest of Canada (n=40)	U.S. Drive (n=122)	U.S. Fly* (n=24)
Hotel or motel	52%	58%	50%	49%	68%
Short-term rental (e.g., AirBnB, Vrbo)	27%	26%	12%	32%	30%
Drive-in lodge or resort	21%	17%	14%	24%	26%
Backcountry or wilderness camping	20%	16%	18%	23%	10%
Designated campground (private or provincial park)	19%	21%	15%	20%	18%
Commercial cottage or cabin rental	17%	31%	10%	16%	20%
Home of friends or relatives (unpaid)	15%	16%	12%	18%	6%
Private cottage (owned or borrowed)	10%	7%	7%	11%	10%
Fly-in or remote outpost camp	8%	4%	0%	10%	12%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P5 Thinking about your most recent Northern Ontario trip that involved motorcycling, where did you stay on that trip? Please select all that apply.

"Not sure" (0%) not shown.

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

ACCOMMODATION ON MOST RECENT TRIP – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to have stayed at the home of friends or relatives (42%).

Hotels or motels are the most common accommodation for every traveller type, from 45% among partners and younger families to 55% among younger and older friend groups.

Accommodation	Overall (n=211)	Solo* (n=25)	Partners* (n=29)	Younger Families (n=33)	Younger Friends (n=50)	Older Friends (n=54)
Hotel or motel	52%	52%	45%	45%	55%	55%
Short-term rental (e.g., AirBnB, Vrbo)	27%	28%	27%	24%	38%	13%
Drive-in lodge or resort	21%	12%	10%	42%	16%	13%
Backcountry or wilderness camping	20%	30%	6%	25%	15%	18%
Designated campground (private or provincial park)	19%	19%	21%	38%	20%	6%
Commercial cottage or cabin rental	17%	20%	11%	28%	17%	12%
Home of friends or relatives (unpaid)	15%	0%	15%	42% ▲	11%	6%
Private cottage (owned or borrowed)	10%	0%	3%	16%	11%	4%
Fly-in or remote outpost camp	8%	0%	3%	17%	11%	5%

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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P5 Thinking about your most recent Northern Ontario trip that involved motorcycling, where did you stay on that trip? Please select all that apply.

"Not sure" (0%) not shown.

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

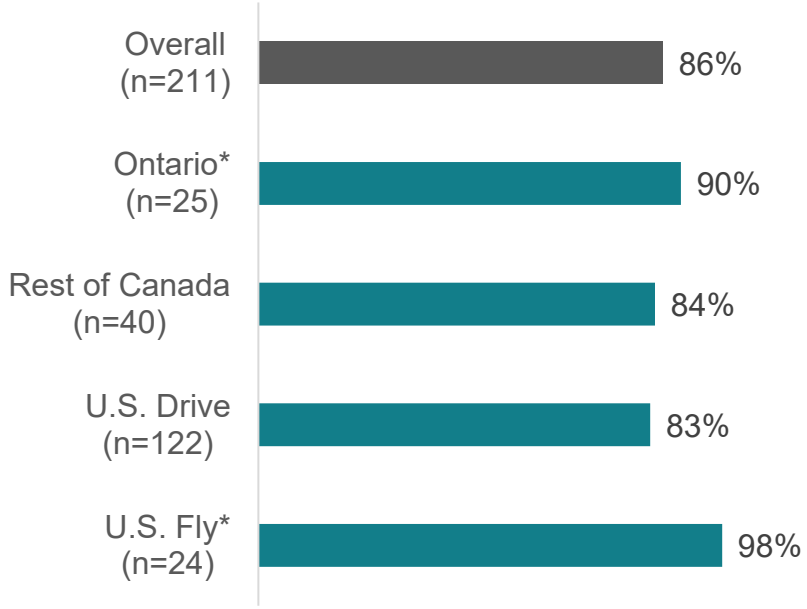
HIGH-YIELD VISITORS

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

Most past-five-year visitors (86%) stayed in paid roofed lodging on their most recent Northern Ontario trip, making them high-yield visitors.

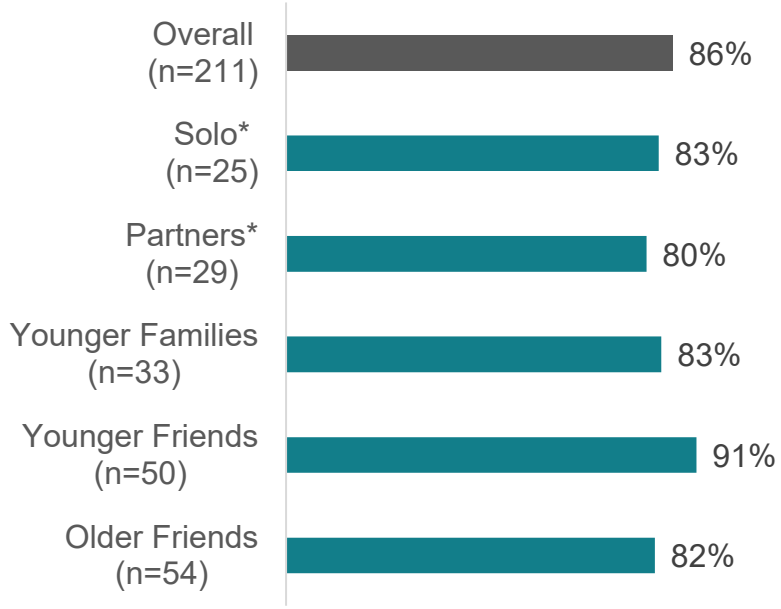
High-yield stays range from 80% among partners to 91% among younger friend groups, with no significant differences. Several market and traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P5_HY Thinking about your most recent Northern Ontario trip that involved motorcycling, where did you stay on that trip? Please select all that apply. High-yield = stayed in a drive-in lodge or resort, fly-in or remote outpost camp, commercial cottage or cabin rental, hotel or motel, or short-term rental (P5 codes 1–5). *Small base (n<30); interpret with caution

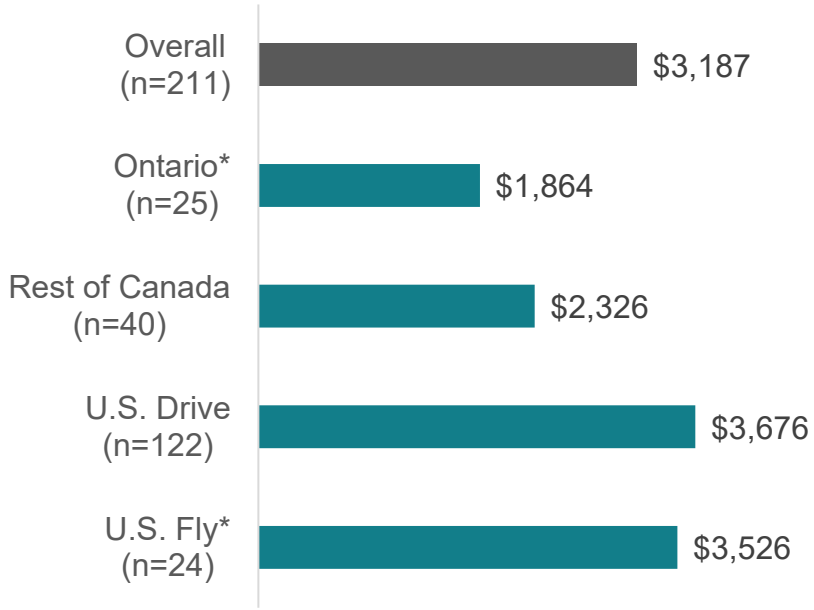
TRAVEL PARTY SPEND ON MOST RECENT NORTHERN ONTARIO TRIP

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

Travel parties spent an average of $3,187 on their most recent Northern Ontario motorcycling trip.

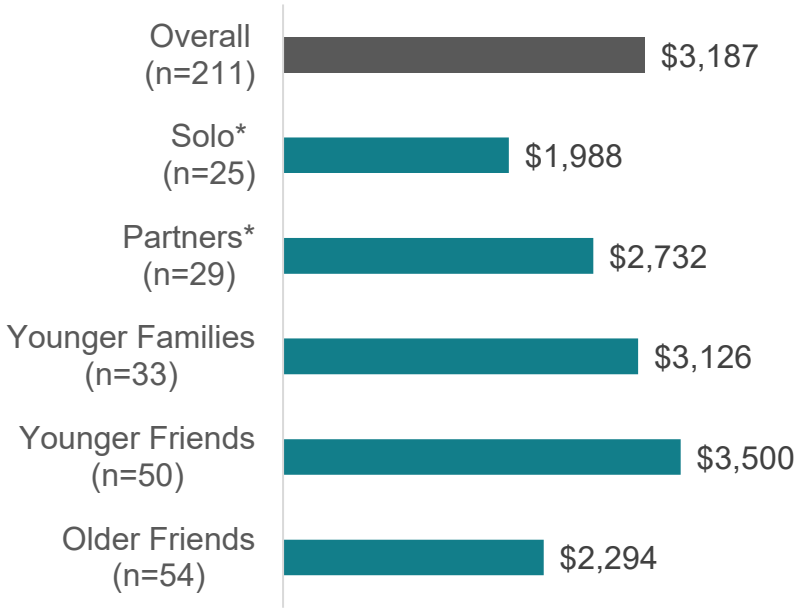
Spending ranges from $1,864 among Ontario visitors to $3,676 among U.S. Drive visitors, and from $1,988 among solo riders to $3,500 among younger friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P6 (CAD) Approximately how much did your travel party spend in total on that Northern Ontario trip? Average total travel party spend in Canadian dollars; U.S. responses converted at 1.37.
*Small base (n<30); interpret with caution.

SERVICES USED ON MOST RECENT TRIP – MARKET

Motorcyclists who have visited Northern Ontario in the past 5 years

Four in ten past-five-year visitors used equipment or gear rental (41%) or a packaged experience (41%) on their most recent trip, and a third (34%) used a local outfitter or guide service. A third (33%) used none of these.

Rest of Canada visitors are less likely than other markets to have used a packaged experience (7%) and more likely to have used none of these services (61%), while U.S. Drive visitors are less likely to have used none (22%).

Service	Overall (n=211)	Ontario* (n=25)	Rest of Canada (n=40)	U.S. Drive (n=122)	U.S. Fly* (n=24)
Equipment or gear rental	41%	16%	28%	48%	55%
Packaged experience (e.g., guided motorcycling package with accommodation, American Plan)	41%	35%	7% ▼	49%	64%
Local outfitter or guide service	34%	10%	14%	42%	51%
Charter or float plane	11%	7%	3%	13%	20%
None of the above	33%	58%	61% ▲	22% ▼	14%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

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

SERVICES USED ON MOST RECENT TRIP – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to have used equipment or gear rental (78%), packaged experiences (65%) and charter or float planes (33%), and younger friend groups local outfitters or guides (51%).

Older friend groups are less likely to have used gear rental, packaged experiences or outfitters, and more likely to have used none of these services (58%).

Service	Overall (n=211)	Solo* (n=25)	Partners* (n=29)	Younger Families (n=33)	Younger Friends (n=50)	Older Friends (n=54)
Equipment or gear rental	41%	33%	24%	78% ▲	47%	20% ▼
Packaged experience (e.g., guided motorcycling package with accommodation, American Plan)	41%	17%	37%	65% ▲	50%	21% ▼
Local outfitter or guide service	34%	28%	23%	48%	51% ▲	12% ▼
Charter or float plane	11%	0%	5%	33% ▲	10%	3%
None of the above	33%	36%	49%	5% ▼	18% ▼	58% ▲

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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

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

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – MARKET

Motorcyclists who have visited Northern Ontario in the past 5 years

For most past-five-year visitors, Northern Ontario was the primary and only destination (45%) or the main destination with brief stops elsewhere (40%) of their most recent motorcycling trip.

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

Role of Northern Ontario	Overall (n=211)	Ontario* (n=25)	Rest of Canada (n=40)	U.S. Drive (n=122)	U.S. Fly* (n=24)
Northern Ontario was our primary and only destination	45%	44%	34%	47%	54%
Northern Ontario was the main destination, with brief stops elsewhere	40%	46%	45%	39%	37%
Northern Ontario was one of several equal destinations on the trip	14%	10%	21%	13%	9%
Northern Ontario was a secondary stop on a trip focused elsewhere	<1%	0%	0%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

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

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

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – TRAVELLER TYPE

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

DESTINATION ONTARIO

Older friend groups are the most likely to say Northern Ontario was their primary and only destination (63%).

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=211)	Solo* (n=25)	Partners* (n=29)	Younger Families (n=33)	Younger Friends (n=50)	Older Friends (n=54)
Northern Ontario was our primary and only destination	45%	11%	47%	49%	46%	63%
Northern Ontario was the main destination, with brief stops elsewhere	40%	62%	30%	44%	43%	25%
Northern Ontario was one of several equal destinations on the trip	14%	27%	23%	8%	9%	13%
Northern Ontario was a secondary stop on a trip focused elsewhere	<1%	0%	0%	0%	1%	0%

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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years (n=211). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

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

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

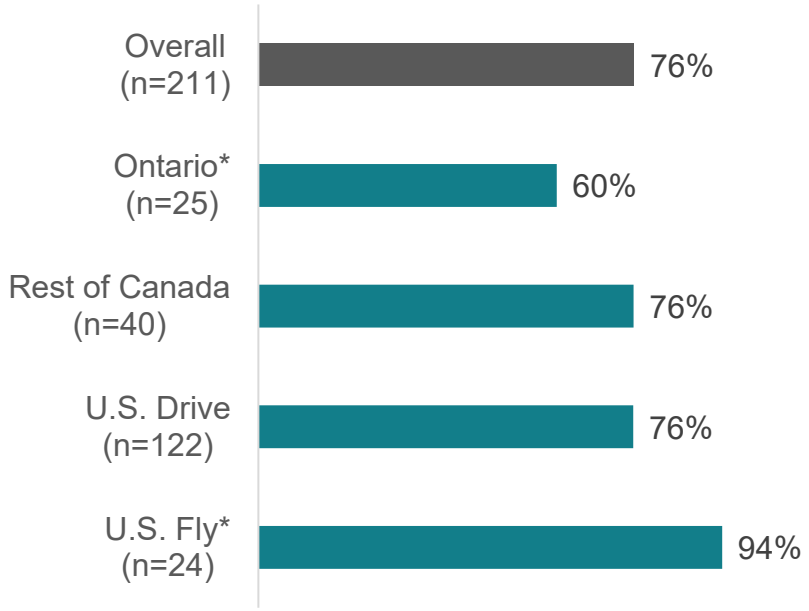
RATING OF MOST RECENT NORTHERN ONTARIO EXPERIENCE

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

Three-quarters of past-five-year visitors (76%) rate their most recent Northern Ontario motorcycling experience as somewhat or much better than trips taken elsewhere, including 45% who rate it much better.

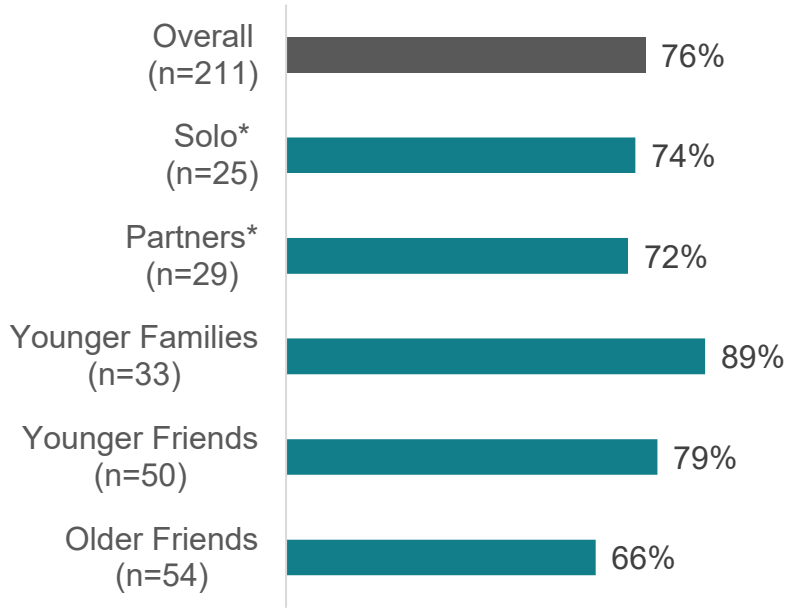
Ratings range from 66% among older friend groups to 89% among younger families, with no significant differences. Several market and traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: motorcyclists who have visited Northern Ontario for motorcycling in the past 5 years, excluding “Don’t know” (n=211). P8 (TOP2)
Compared to motorcycling trips you have taken elsewhere, how would you rate your most recent Northern Ontario experience overall? TOP2 = % somewhat or much better. *Small base (n<30); interpret with caution.



PAST VISITORS VS. OVERALL

PAST VISITORS: MOTORCYCLING AS PART OF IDENTITY – MARKET

All motorcyclists

Nine in ten past visitors (92%) agree that motorcycling and motorcycle culture is a central part of who they are, compared with 81% of motorcyclists overall.

U.S. Drive visitors agree more than their market overall (94% vs. 84%). Ontario and U.S. Fly visitor bases are small for this question.

Response	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
TOP2: Somewhat agree + Strongly agree	81%	74%	76%	84%	79%
	92% ▲	75%	98%	94% ▲	95%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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."
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: MOTORCYCLING AS PART OF IDENTITY – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger friend group visitors agree more than younger friend groups overall that motorcycling is a central part of who they are (92% vs. 83%).

Several traveller type visitor bases are small for this question.

Response	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
TOP2: Somewhat agree + Strongly agree	81%	66%	72%	96%	83%	86%
	92% ▲	89%	89%	99%	92% ▲	93%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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."
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: LIKELIHOOD TO RECOMMEND (NPS) – MARKET

Motorcyclists who know a lot or a little about Northern Ontario

Past visitors give Northern Ontario an NPS of 43, well above the 14 among all motorcyclists who know the region.

U.S. Drive visitors are more positive than their market overall (48 vs. 21). Ontario and U.S. Fly visitor bases are small for this question.

Measure	Overall (n=303 / 199)	Ontario* (n=34 / 25)	Rest of Canada (n=56 / 36)	U.S. Drive (n=175 / 115)	U.S. Fly* (n=38 / 23)
NPS score	14	6	-14	21	26
	43 ▲	29	22	48 ▲	71

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

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

Base: motorcyclists who know a lot or a little about Northern Ontario (n=303; past visitors n=199). 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) for overall or visitors; interpret with caution. Significance not tested.

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

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

Older friend group visitors give Northern Ontario a much higher NPS than older friend groups overall (52 vs. 4).

Several traveller type visitor bases are small for this question.

Measure	Overall (n=303 / 199)	Solo* (n=30 / 21)	Partners* (n=43 / 29)	Younger Families* (n=34 / 29)	Younger Friends (n=68 / 49)	Older Friends (n=103 / 52)
NPS score	14	-28	17	45	18	4
	43 ▲	-7	46	48	42	52 ▲

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

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

Base: motorcyclists who know a lot or a little about Northern Ontario (n=303; past visitors n=199). 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) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists

Nine in ten past visitors (92%) are likely to visit Northern Ontario for motorcycling in the next two years, compared with 67% of motorcyclists overall.

Visitors are more likely to return than their market overall in Rest of Canada (92% vs. 61%) and U.S. Drive (93% vs. 72%).

Response	Overall (n=410 / 210)	Ontario* (n=34 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=239 / 121)	U.S. Fly* (n=66 / 24)
TOP2: Somewhat likely + Very likely	67%	75%	61%	72%	49%
	92% ▲	89%	92% ▲	93% ▲	95%

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

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

Base: all motorcyclists, excluding “Don’t know” (n=410; past visitors n=210). N4 (TOP2) How likely are you to visit Northern Ontario for a motorcycling trip in the next 2 years?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Younger friend group (95% vs. 75%) and older friend group (88% vs. 58%) visitors are more likely than their traveller type overall to visit in the next two years.

Several traveller type visitor bases are small for this question.

Response	Overall (n=410 / 210)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=84 / 50)	Older Friends (n=136 / 53)
TOP2: Somewhat likely + Very likely	67%	75%	58%	86%	75%	58%
	92% ▲	92%	96%	92%	95% ▲	88% ▲

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

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

Base: all motorcyclists, excluding “Don’t know” (n=410; past visitors n=210). N4 (TOP2) How likely are you to visit Northern Ontario for a motorcycling trip in the next 2 years?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (1 OF 6)

All motorcyclists

Weather, cost, poor access and wildfires are cited by similar shares of past visitors and motorcyclists overall.

Within each market, differences between visitors and the market overall are not significant on these barriers; Ontario and U.S. Fly visitor bases are small.

Barrier	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Unfavourable weather or season timing	37%	38%	41%	37%	35%
	29%	39%	32%	29%	16%
Cost	36%	41%	54%	30%	37%
	31%	39%	54%	24%	18%
Poor road, trail, or water access	32%	42%	28%	35%	20%
	23%	31%	7%	30%	11%
Wildfires, flooding, or other environmental disruptions	29%	36%	52%	25%	14%
	29%	46%	49%	22%	19%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (2 OF 6)

All motorcyclists

Past visitors are less likely than motorcyclists overall to be discouraged by poor value for money (19% vs. 29%).

Within each market, differences between visitors and the market overall are not significant on these barriers; Ontario and U.S. Fly visitor bases are small.

Barrier	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Poor value for money	29%	33%	35%	27%	28%
	19% ▼	32%	9%	22%	9%
High transportation costs (gas, airfare)	29%	39%	23%	29%	28%
	22%	44%	8%	23%	18%
Poor or unreliable cell phone or internet connectivity	27%	21%	27%	28%	27%
	20%	22%	0%	26%	21%
Complicated licensing, registration, or permit requirements	27%	10%	36%	28%	21%
	24%	9%	39%	25%	10%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: BARRIERS – MARKET (3 OF 6)

All motorcyclists

Limited accommodation, licensing costs, safety concerns and unclear regulations are cited by similar shares of past visitors and motorcyclists overall.

Within each market, differences between visitors and the market overall are not significant on these barriers; Ontario and U.S. Fly visitor bases are small.

Barrier	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Limited accommodation options	27%	43%	32%	23%	27%
	24%	58%	14%	22%	16%
Expensive licensing, registration, or permit requirements	26%	21%	27%	25%	29%
	17%	26%	7%	18%	23%
Concerns about safety	25%	27%	13%	28%	27%
	22%	29%	2%	25%	29%
Unfamiliar or unclear regulations	23%	19%	22%	24%	26%
	15%	21%	19%	14%	9%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: BARRIERS – MARKET (4 OF 6)

All motorcyclists

Lack of amenities, distance and insects are cited by similar shares of past visitors and motorcyclists overall.

Among U.S. motorcyclists, 21% of U.S. Drive visitors cite anti-American sentiment, compared with 27% of the market overall. Significance is not shown for this U.S.-only item.

Barrier	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Lack of amenities or services at the destination	21%	20%	31%	17%	24%
	19%	24%	26%	18%	11%
Too far to drive	20%	13%	35%	13%	35%
	14%	8%	31%	7%	29%
Insects (e.g., blackflies, mosquitoes)	20%	19%	33%	18%	15%
	17%	23%	27%	13%	15%
Anti-American sentiment	20%	–	–	27%	23%
	14%	–	–	21%	15%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (5 OF 6)

All motorcyclists

Few past visitors say they do not know enough about Northern Ontario's motorcycling opportunities (5% vs. 17% of motorcyclists overall).

This is lower among U.S. Drive visitors than the market overall (6% vs. 16%).

Barrier	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
I do not know enough about Northern Ontario's motorcycling opportunities	17%	7%	25%	16%	20%
	5% ▼	3%	8%	6% ▼	0%
Concerns about crossing the Canada-US border	17%	–	–	22%	25%
	8%	–	–	13%	9%
Too remote or rugged for my comfort level	16%	17%	21%	14%	15%
	11%	3%	18%	12%	8%
Vehicle registration or insurance requirements across jurisdictions	15%	5%	10%	16%	22%
	9%	7%	0%	11%	14%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (6 OF 6)

All motorcyclists

Planning information, campsite availability, storage and doubts about quality are each cited by one in five past visitors or fewer.

Within each market, differences between visitors and the market overall are not significant on these barriers; Ontario and U.S. Fly visitor bases are small.

Barrier	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Difficulty finding reliable trip planning information	14%	16%	11%	16%	11%
	16%	18%	2%	20%	16%
Availability of campsites or RV sites	14%	15%	22%	13%	9%
	20%	14%	26%	20%	10%
Lack of secure equipment or vehicle storage	14%	14%	7%	17%	10%
	13%	15%	0%	17%	11%
Not sure the motorcycling quality would meet my expectations	8%	10%	16%	7%	4%
	3%	10%	2%	2%	3%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Weather, cost, poor access and wildfires are cited by similar shares of past visitors and motorcyclists overall.

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

Barrier	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Unfavourable weather or season timing	37%	41%	35%	24%	36%	46%
	29%	11%	22%	26%	27%	49%
Cost	36%	50%	39%	34%	33%	31%
	31%	41%	36%	29%	22%	29%
Poor road, trail, or water access	32%	40%	37%	19%	23%	40%
	23%	10%	30%	20%	20%	38%
Wildfires, flooding, or other environmental disruptions	29%	41%	21%	14%	23%	39%
	29%	41%	19%	14%	25%	43%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Past visitors are less likely than motorcyclists overall to be discouraged by poor value for money (19% vs. 29%).

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

Barrier	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Poor value for money	29%	26%	35%	10%	30%	32%
	19% ▼	1%	40%	9%	28%	19%
High transportation costs (gas, airfare)	29%	27%	31%	23%	25%	29%
	22%	11%	26%	23%	20%	20%
Poor or unreliable cell phone or internet connectivity	27%	17%	27%	17%	26%	33%
	20%	0%	17%	18%	21%	31%
Complicated licensing, registration, or permit requirements	27%	39%	17%	12%	21%	37%
	24%	30%	19%	12%	22%	38%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

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

All motorcyclists | Traveller types are defined on slide 10

Limited accommodation, licensing costs, safety concerns and unclear regulations are cited by similar shares of past visitors and motorcyclists overall.

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

Barrier	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Limited accommodation options	27%	18%	25%	15%	25%	36%
	24%	15%	21%	14%	19%	40%
Expensive licensing, registration, or permit requirements	26%	29%	27%	18%	21%	28%
	17%	3%	25%	19%	17%	19%
Concerns about safety	25%	21%	29%	21%	33%	23%
	22%	4%	31%	22%	35%	14%
Unfamiliar or unclear regulations	23%	33%	26%	26%	25%	19%
	15%	14%	16%	22%	16%	16%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

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

All motorcyclists | Traveller types are defined on slide 10

Lack of amenities, distance, insects and anti-American sentiment are cited by similar shares of past visitors and motorcyclists overall.

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

Barrier	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Lack of amenities or services at the destination	21%	18%	23%	7%	13%	26%
	19%	8%	16%	8%	11%	40%
Too far to drive	20%	22%	20%	10%	23%	20%
	14%	9%	7%	6%	15%	20%
Insects (e.g., blackflies, mosquitoes)	20%	4%	25%	14%	13%	25%
	17%	1%	28%	16%	11%	25%
Anti-American sentiment	20%	10%	22%	9%	19%	24%
	14%	1%	26%	6%	18%	15%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Few past visitors say they do not know enough about Northern Ontario's motorcycling opportunities (5% vs. 17%).

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

Barrier	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
I do not know enough about Northern Ontario's motorcycling opportunities	17%	30%	15%	7%	7%	26%
	5% ▼	17%	4%	3%	2%	7%
Concerns about crossing the Canada-US border	17%	8%	29%	9%	14%	15%
	8%	1%	14%	5%	9%	5%
Too remote or rugged for my comfort level	16%	30%	14%	5%	11%	18%
	11%	28%	8%	4%	10%	11%
Vehicle registration or insurance requirements across jurisdictions	15%	19%	18%	15%	16%	13%
	9%	2%	8%	16%	13%	3%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Planning information, campsite availability, storage and doubts about quality are each cited by one in five past visitors or fewer.

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

Barrier	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Difficulty finding reliable trip planning information	14%	15%	11%	15%	17%	13%
	16%	0%	19%	13%	20%	15%
Availability of campsites or RV sites	14%	22%	11%	11%	15%	15%
	20%	38%	19%	13%	20%	20%
Lack of secure equipment or vehicle storage	14%	15%	8%	12%	16%	17%
	13%	0%	9%	11%	19%	16%
Not sure the motorcycling quality would meet my expectations	8%	8%	7%	7%	9%	11%
	3%	0%	3%	7%	3%	5%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: INDEPENDENT VS. GUIDED RIDING – MARKET

All motorcyclists

Past visitors are more likely than motorcyclists overall to use a mix of guided and self-guided experiences (37% vs. 26%) and less likely to go fully self-guided (61% vs. 72%).

U.S. Drive visitors show the same shift compared with their market overall (40% vs. 29% using a mix).

Approach	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
I mainly go on my own or with my own group – fully self-guided	72%	76%	77%	70%	72%
	61% ▼	66%	71%	59% ▼	46%
I use a mix of guided and self-guided	26%	21%	18%	29%	26%
	37% ▲	30%	22%	40% ▲	54%
I mainly use guided or outfitted experiences provided by operators	2%	0%	4%	1%	0%
	2%	0%	7%	1%	0%

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

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

Base: all motorcyclists (n=416; past visitors n=211). T6 When you go on a motorcycling trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: INDEPENDENT VS. GUIDED RIDING – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Past visitors are more likely than motorcyclists overall to use a mix of guided and self-guided experiences (37% vs. 26%).

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

Approach	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
I mainly go on my own or with my own group – fully self-guided	72%	74%	86%	45%	55%	84%
	61% ▼	61%	84%	35%	48%	78%
I use a mix of guided and self-guided	26%	26%	14%	45%	42%	15%
	37% ▲	39%	16%	54%	49%	22%
I mainly use guided or outfitted experiences provided by operators	2%	0%	0%	9%	1%	1%
	2%	0%	0%	11%	1%	0%

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

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

Base: all motorcyclists (n=416; past visitors n=211). T6 When you go on a motorcycling trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: USE OF CERTIFIED ROUTES OR PASSES – MARKET

All motorcyclists

Nearly half of past visitors (47%) have used an established or certified touring route, trail pass network or passport program, compared with a third of motorcyclists overall (34%).

U.S. Drive visitors are more likely than their market overall to have used one (58% vs. 40%).

Response	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Yes	34%	26%	12%	40%	42%
	47% ▲	35%	7%	58% ▲	71%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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?
"No" and "Not sure" not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

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

All motorcyclists | Traveller types are defined on slide 10

Younger friend group visitors are more likely than younger friend groups overall to have used a certified route, trail pass network or passport program (60% vs. 49%).

Several traveller type visitor bases are small for this question.

Response	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Yes	34%	14%	26%	60%	49%	23%
	47% ▲	14%	42%	62%	60% ▲	32%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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?
"No" and "Not sure" not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: IMPORTANCE OF CERTIFICATION – MARKET

All motorcyclists

Eight in ten past visitors (80%) say recognized certification or designation is important, compared with 69% of motorcyclists overall.

U.S. Drive visitors place more importance on certification than their market overall (86% vs. 74%).

Response	Overall (n=411 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=239 / 122)	U.S. Fly* (n=65 / 24)
TOP2: Somewhat important + Very important	69%	64%	58%	74%	64%
	80% ▲	62%	65%	86% ▲	94%

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

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

Base: all motorcyclists, excluding “Don’t know” (n=411; past visitors n=211). 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)?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: IMPORTANCE OF CERTIFICATION – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger friend group visitors place more importance on certification than younger friend groups overall (91% vs. 78%).

Solo riders, including visitors, place the least importance on certification (36%).

Response	Overall (n=411 / 211)	Solo* (n=44 / 25)	Partners* (n=73 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=139 / 54)
TOP2: Somewhat important + Very important	69%	36%	66%	87%	78%	68%
	80% ▲	36%	84%	90%	91% ▲	79%

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

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

Base: all motorcyclists, excluding “Don’t know” (n=411; past visitors n=211). 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)?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists

Past visitors are less likely than motorcyclists overall to use word of mouth (44% vs. 55%) and general internet search (36% vs. 47%) for inspiration and planning.

U.S. Drive visitors are less likely than their market overall to use word of mouth (42% vs. 55%).

Source	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Word of mouth (e.g., friends or family)	55%	66%	55%	55%	51%
	44% ▼	72%	43%	42% ▼	24%
General internet search (e.g., Google, Bing)	47%	29%	49%	49%	50%
	36% ▼	23%	35%	40%	35%
Social media content (e.g., Instagram, Facebook, YouTube)	38%	26%	16%	41%	55%
	40%	37%	17%	45%	55%
Official tourism websites (e.g., national, provincial, state, regional, city)	29%	49%	33%	27%	21%
	32%	46%	38%	26%	40%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	24%	23%	18%	26%	27%
	26%	29%	5%	30%	38%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists

Past visitors use AI tools, TV, visitor centres, articles and rally calendars at similar rates to motorcyclists overall.

U.S. Drive visitors are more likely than their market overall to use AI tools (36% vs. 24%).

Source	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	11%	21%	24%	31%
	30%	15%	18%	36% ▲	40%
TV shows or documentaries	22%	14%	13%	24%	26%
	22%	12%	7%	28%	29%
Travel information centres or visitor centres	21%	21%	17%	23%	16%
	22%	19%	10%	26%	29%
Articles, blogs, or videos about travel destinations	21%	15%	8%	23%	29%
	19%	14%	0%	24%	29%
Rally or event calendars	20%	16%	29%	18%	25%
	19%	23%	26%	17%	14%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists

Magazines, influencers, forums and outdoor publications are used by similar shares of past visitors and motorcyclists overall.

Within each market, differences between visitors and the market overall are not significant on these sources; Ontario and U.S. Fly visitor bases are small.

Source	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Magazines, travel guides or brochures	20%	28%	15%	19%	21%
	22%	40%	16%	21%	22%
Social media influencers	19%	13%	16%	19%	24%
	23%	10%	23%	23%	42%
Forums or online communities	18%	10%	13%	20%	22%
	15%	10%	2%	21%	15%
Outdoor or sporting magazines or publications	14%	20%	9%	15%	14%
	18%	21%	10%	20%	18%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists

Past visitors are more likely than motorcyclists overall to use specialized apps (19% vs. 12%).

Within each market, differences between visitors and the market overall are not significant on these sources; Ontario and U.S. Fly visitor bases are small.

Source	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Club or association newsletters or websites	13%	7%	4%	16%	14%
	14%	10%	0%	18%	17%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	12%	20%	14%	9%	20%
	19% ▲	25%	24%	14%	31%
Outfitter or lodge websites	11%	14%	4%	13%	9%
	15%	19%	3%	17%	16%
Consumer shows/exhibitions	8%	12%	7%	8%	10%
	8%	9%	3%	9%	11%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists

Past visitors are more likely to use email newsletters (13% vs. 7%).

Within each market, differences between visitors and the market overall are not significant on these sources; Ontario and U.S. Fly visitor bases are small.

Source	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Travel agents	7%	14%	2%	7%	12%
	12%	20%	3%	10%	25%
Email newsletters	7%	6%	12%	7%	4%
	13% ▲	9%	20%	13%	10%
Travel-related phone lines or hotlines	6%	13%	0%	7%	7%
	10%	12%	0%	12%	16%
Other	<1%	0%	1%	<1%	0%
	0%	0%	0%	0%	0%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

DESTINATION ONTARIO

Past visitors are less likely than motorcyclists overall to use word of mouth (44% vs. 55%) and general internet search (36% vs. 47%).

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

Source	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Word of mouth (e.g., friends or family)	55%	24%	67%	36%	55%	67%
	44% ▼	12%	48%	30%	48%	60%
General internet search (e.g., Google, Bing)	47%	54%	49%	42%	41%	52%
	36% ▼	42%	42%	41%	30%	36%
Social media content (e.g., Instagram, Facebook, YouTube)	38%	24%	38%	39%	54%	29%
	40%	22%	44%	38%	59%	23%
Official tourism websites (e.g., national, provincial, state, regional, city)	29%	22%	23%	28%	30%	33%
	32%	14%	30%	28%	34%	38%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	24%	25%	25%	34%	36%	14%
	26%	15%	24%	36%	38%	13%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Past visitors use AI tools, TV, visitor centres, articles and rally calendars at similar rates to motorcyclists overall.

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

Source	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
AI tools (e.g., ChatGPT, Gemini, Copilot)	23%	8%	21%	40%	29%	16%
	30%	5%	26%	46%	38%	18%
TV shows or documentaries	22%	13%	18%	30%	23%	20%
	22%	0%	15%	28%	25%	24%
Travel information centres or visitor centres	21%	3%	23%	34%	21%	20%
	22%	6%	35%	37%	25%	12%
Articles, blogs, or videos about travel destinations	21%	18%	17%	16%	34%	15%
	19%	8%	16%	17%	34%	8%
Rally or event calendars	20%	6%	14%	26%	11%	32%
	19%	1%	17%	25%	10%	37%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Magazines, influencers, forums and outdoor publications are used by similar shares of past visitors and motorcyclists overall.

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

Source	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Magazines, travel guides or brochures	20%	14%	19%	31%	17%	20%
	22%	19%	30%	32%	19%	21%
Social media influencers	19%	16%	15%	24%	33%	9%
	23%	28%	22%	26%	27%	10%
Forums or online communities	18%	7%	16%	28%	24%	18%
	15%	1%	7%	29%	29%	9%
Outdoor or sporting magazines or publications	14%	15%	16%	20%	11%	14%
	18%	16%	30%	17%	13%	21%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Past visitors are more likely than motorcyclists overall to use specialized apps (19% vs. 12%).

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

Source	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Club or association newsletters or websites	13%	0%	7%	25%	19%	12%
	14%	0%	14%	23%	21%	6%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	12%	9%	4%	23%	16%	11%
	19% ▲	11%	8%	28%	17%	24%
Outfitter or lodge websites	11%	9%	6%	19%	14%	8%
	15%	9%	10%	22%	15%	12%
Consumer shows/exhibitions	8%	0%	4%	24%	9%	8%
	8%	0%	9%	28%	6%	5%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Past visitors are more likely to use email newsletters (13% vs. 7%).

Older friend group visitors are more likely than older friend groups overall to use email newsletters (26% vs. 10%).

Source	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Travel agents	7%	4%	6%	25%	10%	3%
	12%	8%	12%	29%	13%	3%
Email newsletters	7%	1%	4%	11%	8%	10%
	13% ▲	0%	11%	12%	10%	26% ▲
Travel-related phone lines or hotlines	6%	6%	4%	16%	10%	2%
	10%	10%	12%	16%	15%	3%
Other	<1%	0%	0%	0%	0%	1%
	0%	0%	0%	0%	0%	0%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (1 OF 3)

Motorcyclists who use social media to plan

Among motorcyclists who use social media to plan, past visitors are more likely to use Instagram (69% vs. 58%), while YouTube (76%) and Facebook (71%) use is similar.

U.S. Drive visitors are more likely than their market overall to use Instagram (68% vs. 54%). Visitor bases in the other markets are small.

Platform	Overall (n=189 / 104)	Ontario* (n=11 / 9)	Rest of Canada* (n=21 / 15)	U.S. Drive (n=118 / 65)	U.S. Fly* (n=39 / 15)
YouTube	73%	89%	22%	77%	82%
	76%	100%	24%	82%	89%
Facebook	73%	59%	73%	72%	81%
	71%	59%	69%	70%	87%
Instagram	58%	53%	66%	54%	67%
	69% ▲	65%	59%	68% ▲	91%
TikTok	48%	39%	22%	52%	54%
	53%	48%	10%	60%	73%

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

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

Base: motorcyclists who use social media to plan (B4) (n=189; past visitors n=104). 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) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (2 OF 3)

Motorcyclists who use social media to plan

Past visitors are more likely to use X (44% vs. 29%), Snapchat (29% vs. 20%) and WhatsApp (26% vs. 18%).

U.S. Drive visitors are more likely than their market overall to use X (50% vs. 34%) and WhatsApp (25% vs. 15%).

Platform	Overall (n=189 / 104)	Ontario* (n=11 / 9)	Rest of Canada* (n=21 / 15)	U.S. Drive (n=118 / 65)	U.S. Fly* (n=39 / 15)
Reddit	35%	25%	23%	39%	33%
	44%	31%	31%	46%	57%
X (formerly known as Twitter)	29%	12%	16%	34%	26%
	44% ▲	15%	22%	50% ▲	58%
Snapchat	20%	28%	10%	18%	27%
	29% ▲	34%	14%	27%	49%
WhatsApp	18%	31%	6%	15%	29%
	26% ▲	38%	8%	25% ▲	45%

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

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

Base: motorcyclists who use social media to plan (B4) (n=189; past visitors n=104). 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) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (3 OF 3)

Motorcyclists who use social media to plan

Past visitors are more likely to use Pinterest (24% vs. 16%).

U.S. Drive visitors are more likely than their market overall to use Threads (27% vs. 17%).

Platform	Overall (n=189 / 104)	Ontario* (n=11 / 9)	Rest of Canada* (n=21 / 15)	U.S. Drive (n=118 / 65)	U.S. Fly* (n=39 / 15)
Pinterest	16%	14%	4%	19%	17%
	24% ▲	17%	5%	28%	34%
Threads	14%	8%	0%	17%	16%
	21%	10%	0%	27% ▲	20%
Other	1%	0%	0%	1%	0%
	1%	0%	0%	2%	0%

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

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

Base: motorcyclists who use social media to plan (B4) (n=189; past visitors n=104). 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) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (1 OF 3)

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

Past visitors are more likely than all motorcyclists who use social media to plan to use Instagram (69% vs. 58%).

Most traveller type visitor bases are small for this question.

Platform	Overall (n=189 / 104)	Solo* (n=17 / 12)	Partners* (n=31 / 13)	Younger Families* (n=20 / 17)	Younger Friends (n=56 / 35)	Older Friends* (n=49 / 15)
YouTube	73%	34%	68%	90%	82%	72%
	76%	21%	91%	88%	85%	62%
Facebook	73%	81%	75%	71%	69%	75%
	71%	74%	75%	70%	66%	76%
Instagram	58%	41%	56%	76%	75%	37%
	69% ▲	44%	66%	78%	80%	69%
TikTok	48%	10%	58%	52%	56%	42%
	53%	14%	65%	60%	51%	65%

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

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

Base: motorcyclists who use social media to plan (B4) (n=189; past visitors n=104). 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) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (2 OF 3)

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

Past visitors are more likely to use X, Snapchat and WhatsApp.

Most traveller type visitor bases are small for this question.

Platform	Overall (n=189 / 104)	Solo* (n=17 / 12)	Partners* (n=31 / 13)	Younger Families* (n=20 / 17)	Younger Friends (n=56 / 35)	Older Friends* (n=49 / 15)
Reddit	35%	40%	22%	40%	38%	26%
	44%	40%	46%	44%	44%	26%
X (formerly known as Twitter)	29%	5%	16%	47%	37%	26%
	44% ▲	7%	34%	57%	47%	53%
Snapchat	20%	0%	10%	53%	20%	17%
	29% ▲	0%	9%	64%	22%	40%
WhatsApp	18%	5%	11%	51%	16%	10%
	26% ▲	7%	19%	58%	22%	26%

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

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

Base: motorcyclists who use social media to plan (B4) (n=189; past visitors n=104). 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) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (3 OF 3)

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

Past visitors are more likely to use Pinterest (24% vs. 16%).

Most traveller type visitor bases are small for this question.

Platform	Overall (n=189 / 104)	Solo* (n=17 / 12)	Partners* (n=31 / 13)	Younger Families* (n=20 / 17)	Younger Friends (n=56 / 35)	Older Friends* (n=49 / 15)
Pinterest	16%	0%	15%	29%	16%	14%
	24% ▲	0%	30%	35%	18%	31%
Threads	14%	0%	4%	30%	12%	14%
	21%	0%	9%	36%	13%	37%
Other	1%	0%	0%	2%	0%	2%
	1%	0%	0%	3%	0%	5%

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

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

Base: motorcyclists who use social media to plan (B4) (n=189; past visitors n=104). 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) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – MARKET

All motorcyclists

Two-thirds of past visitors (68%) are likely to use AI tools to plan their next motorcycling trip, compared with 59% of motorcyclists overall.

U.S. Drive visitors are more likely than their market overall to plan with AI (76% vs. 61%).

Response	Overall (n=408 / 208)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=237 / 119)	U.S. Fly* (n=65 / 24)
TOP2: Somewhat likely + Very likely	59%	46%	42%	61%	80%
	68% ▲	47%	42%	76% ▲	90%

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

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

Base: all motorcyclists, excluding “Don’t know” (n=408; past visitors n=208). 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?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Past visitors are more likely than motorcyclists overall to use AI tools to plan their next trip (68% vs. 59%).

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

Response	Overall (n=408 / 208)	Solo* (n=44 / 25)	Partners* (n=71 / 27)	Younger Families (n=40 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=140 / 53)
TOP2: Somewhat likely + Very likely	59%	39%	46%	86%	69%	55%
	68% ▲	53%	53%	90%	78%	56%

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

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

Base: all motorcyclists, excluding “Don’t know” (n=408; past visitors n=208). 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?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: AWARENESS OF NORTHERN ONTARIO – MARKET

Motorcyclists who do not live in Northern Ontario

Past visitors are much more likely than motorcyclists overall to know a lot about Northern Ontario (54% vs. 32%), and few have heard of it but know nothing about it (4% vs. 23%).

U.S. Drive visitors show the same pattern compared with their market overall (58% vs. 34% know a lot). Ontario and U.S. Fly visitor bases are small for this question.

Awareness	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
I have heard of and know a lot about it	32%	32%	23%	34%	33%
	54% ▲	39%	32%	58% ▲	83%
I have heard of and know a little bit about it	41%	64%	57%	38%	24%
	41%	61%	58%	36%	12%
I have heard of but know nothing about it	23%	0%	17%	23%	39%
	4% ▼	0%	10%	3% ▼	5%
I have never heard of before	4%	4%	3%	5%	4%
	1%	0%	0%	3%	0%

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

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

Base: motorcyclists who do not live in Northern Ontario (n=416; past visitors n=211). N0 How would you best describe your awareness of Northern Ontario?

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

PAST VISITORS: AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Younger friend group (61% vs. 38%) and older friend group (54% vs. 30%) visitors are more likely than their traveller type overall to know a lot about Northern Ontario.

Both groups' visitors are less likely to have heard of it but know nothing about it (3% each).

Awareness	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
I have heard of and know a lot about it	32%	6%	21%	58%	38%	30%
	54% ▲	10%	51%	67%	61% ▲	54% ▲
I have heard of and know a little bit about it	41%	63%	36%	27%	41%	43%
	41%	75%	47%	21%	37%	43%
I have heard of but know nothing about it	23%	30%	34%	8%	16%	24%
	4% ▼	16%	2%	2%	3% ▼	3% ▼
I have never heard of before	4%	1%	9%	8%	5%	3%
	1%	0%	0%	10%	0% ▼	0%

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

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

Base: motorcyclists who do not live in Northern Ontario (n=416; past visitors n=211). N0 How would you best describe your awareness of Northern Ontario?

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

PAST VISITORS: CLUB OR ASSOCIATION MEMBERSHIP – MARKET

All motorcyclists

Half of past visitors (49%) are members of a motorcycling-related club or association, compared with 36% of motorcyclists overall.

U.S. Drive visitors are more likely than their market overall to be members (58% vs. 42%).

Response	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Yes	36%	15%	28%	42%	33%
	49% ▲	21%	33%	58% ▲	63%

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

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

Base: all motorcyclists (n=416; past visitors n=211). A10 Are you currently a member of a motorcycling-related club or association (e.g., riding club, snowmobile club, yacht/boating club)?
"No" and "Not sure" not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: CLUB OR ASSOCIATION MEMBERSHIP – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger friend group visitors are more likely than younger friend groups overall to be club members (62% vs. 50%).

Several traveller type visitor bases are small for this question.

Response	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Yes	36%	10%	25%	63%	50%	33%
	49% ▲	14%	30%	73%	62% ▲	48%

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

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

Base: all motorcyclists (n=416; past visitors n=211). A10 Are you currently a member of a motorcycling-related club or association (e.g., riding club, snowmobile club, yacht/boating club)?
"No" and "Not sure" not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: ROLE IN TRAVEL DECISIONS – MARKET

All motorcyclists

Past visitors are more likely than motorcyclists overall to say motorcycling is always the primary purpose of their trips (34% vs. 24%).

U.S. Drive visitors show the same pattern compared with their market overall (40% vs. 27%).

Role in travel decisions	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
It is always the primary purpose of my trips	24%	15%	14%	27%	28%
	34% ▲	21%	20%	40% ▲	43%
It is usually the primary purpose, but not always	45%	31%	55%	46%	36%
	43%	35%	50%	43%	43%
It is often a secondary activity alongside other trip purposes	25%	41%	26%	21%	27%
	21%	39%	30%	16%	10%
It is rarely the primary purpose of my trips	5%	10%	4%	5%	6%
	1%	0%	0%	1%	4%

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

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

Base: all motorcyclists (n=416; past visitors n=211). T2B Which of the following best describes the role motorcycling plays in your travel decisions?
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: ROLE IN TRAVEL DECISIONS – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Past visitors are more likely than motorcyclists overall to say motorcycling is always the primary purpose of their trips (34% vs. 24%).

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

Role in travel decisions	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
It is always the primary purpose of my trips	24%	28%	16%	42%	28%	17%
	34% ▲	41%	22%	47%	35%	24%
It is usually the primary purpose, but not always	45%	39%	43%	47%	41%	51%
	43%	50%	46%	48%	45%	33%
It is often a secondary activity alongside other trip purposes	25%	26%	37%	10%	21%	27%
	21%	9%	32%	6%	17%	39%
It is rarely the primary purpose of my trips	5%	7%	4%	1%	9%	5%
	1%	0%	0%	0%	4%	1%

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

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

Base: all motorcyclists (n=416; past visitors n=211). T2B Which of the following best describes the role motorcycling plays in your travel decisions?
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GEAR AND OUTFITTER USE – MARKET

All motorcyclists

Past visitors are more likely than motorcyclists overall to combine their own gear with local outfitters or rental operators (38% vs. 29%), and less likely to rely on their own gear alone (57% vs. 68%).

U.S. Drive visitors show the same shift compared with their market overall (38% vs. 28% also using outfitters).

Approach	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	68%	73%	56%	70%	67%
	57% ▼	70%	39%	60% ▼	54%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	29%	27%	32%	28%	30%
	38% ▲	30%	40%	38% ▲	46%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	2%	0%	0%	2%	3%
	1%	0%	0%	2%	0%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: GEAR AND OUTFITTER USE – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Past visitors are more likely than motorcyclists overall to also use local outfitters or rental operators (38% vs. 29%).

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

Approach	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
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%
	57% ▼	50%	81%	46%	53%	59%
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%
	38% ▲	50%	19%	51%	45%	26%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	2%	0%	0%	6%	2%	1%
	1%	0%	0%	3%	2%	0%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: IMPORTANCE OF LOCAL OPERATORS – MARKET

All motorcyclists

Six in ten past visitors (63%) say working with a local outfitter, guide, rental operator, marina or accommodation provider is important, compared with half of motorcyclists overall (48%).

U.S. Drive visitors place more importance on local operators than their market overall (66% vs. 50%).

Response	Overall (n=410 / 210)	Ontario* (n=35 / 24)	Rest of Canada (n=70 / 40)	U.S. Drive (n=240 / 122)	U.S. Fly* (n=65 / 24)
TOP2: Somewhat important + Very important	48%	45%	35%	50%	55%
	63% ▲	49%	53%	66% ▲	82%

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

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

Base: all motorcyclists, excluding "Don't know" (n=410; past visitors n=210). B3 (TOP2) When planning a motorcycling trip, how important is working with a local outfitter, guide, rental operator, marina, or accommodation provider?

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

Note: "Local operators" in this question include accommodation providers and marinas as well as outfitters, guides and rental operators.

PAST VISITORS: IMPORTANCE OF LOCAL OPERATORS – TRAVELLER TYPE

All motorcyclists | Traveller types are defined on slide 10

Younger friend group visitors place more importance on working with local operators than younger friend groups overall (79% vs. 66%).

Several traveller type visitor bases are small for this question.

Response	Overall (n=410 / 210)	Solo* (n=44 / 25)	Partners* (n=73 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=84 / 49)	Older Friends (n=140 / 54)
TOP2: Somewhat important + Very important	48%	42%	42%	82%	66%	31%
	63% ▲	50%	59%	86%	79% ▲	39%

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

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

Base: all motorcyclists, excluding "Don't know" (n=410; past visitors n=210). B3 (TOP2) When planning a motorcycling trip, how important is working with a local outfitter, guide, rental operator, marina, or accommodation provider?

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

Note: "Local operators" in this question include accommodation providers and marinas as well as outfitters, guides and rental operators.

PAST VISITORS: MOTIVATIONS – MARKET (1 OF 3)

All motorcyclists

Past visitors are less likely than motorcyclists overall to be motivated by escape from everyday stress (55% vs. 68%) and experiencing new places (51% vs. 62%).

U.S. Drive visitors are less likely than their market overall to cite escape (55% vs. 67%), and Rest of Canada visitors new places (23% vs. 48%).

Motivation	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Escape from everyday stress and routine	68%	61%	73%	67%	72%
	55% ▼	53%	58%	55% ▼	50%
Experiencing new places and landscapes	62%	58%	48%	63%	71%
	51% ▼	46%	23% ▼	60%	58%
Exploring open roads, trails, or waterways	57%	52%	51%	61%	47%
	50%	39%	42%	54%	50%
Thrill, challenge, or sense of adventure	53%	67%	41%	52%	60%
	49%	59%	45%	49%	44%

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

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

Base: all motorcyclists (n=416; past visitors n=211). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: MOTIVATIONS – MARKET (2 OF 3)

All motorcyclists

Connection with nature, bonding, solitude and wildlife motivate similar shares of past visitors and motorcyclists overall.

Within each market, differences between visitors and the market overall are not significant on these motivations; Ontario and U.S. Fly visitor bases are small.

Motivation	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Connection with nature and the outdoors	49%	46%	45%	54%	40%
	44%	39%	47%	46%	41%
Bonding with friends or family	48%	54%	35%	49%	54%
	47%	56%	36%	49%	39%
Solitude and personal reflection	43%	47%	50%	40%	45%
	37%	47%	42%	35%	26%
Wildlife encounters and natural discovery	33%	27%	37%	33%	30%
	38%	28%	41%	39%	41%

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

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

Base: all motorcyclists (n=416; past visitors n=211). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: MOTIVATIONS – MARKET (3 OF 3)

All motorcyclists

Camaraderie, fitness and tradition motivate similar shares of past visitors and motorcyclists overall.

U.S. Drive visitors are more likely than their market overall to be motivated by physical fitness and health (30% vs. 21%).

Motivation	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Camaraderie or connection with other motorcycling enthusiasts	32%	32%	29%	34%	30%
	29%	43%	21%	31%	18%
Physical fitness and health	20%	15%	8%	21%	30%
	26%	21%	7%	30% ▲	40%
Tradition or cultural heritage related to the activity	17%	21%	9%	17%	22%
	20%	23%	11%	21%	28%
Other	<1%	5%	0%	0%	0%
	1%	7%	0%	0%	0%

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

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

Base: all motorcyclists (n=416; past visitors n=211). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Past visitors are less likely than motorcyclists overall to be motivated by escape (55% vs. 68%) and experiencing new places (51% vs. 62%).

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

Motivation	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Escape from everyday stress and routine	68%	56%	71%	49%	62%	80%
	55% ▼	33%	56%	41%	54%	64%
Experiencing new places and landscapes	62%	58%	66%	48%	54%	69%
	51% ▼	33%	61%	47%	45%	58%
Exploring open roads, trails, or waterways	57%	52%	45%	48%	64%	63%
	50%	46%	53%	47%	56%	48%
Thrill, challenge, or sense of adventure	53%	41%	42%	53%	56%	64%
	49%	25%	57%	54%	46%	63%

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

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

Base: all motorcyclists (n=416; past visitors n=211). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

DESTINATION ONTARIO

Connection with nature, bonding, solitude and wildlife motivate similar shares of past visitors and motorcyclists overall.

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

Motivation	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Connection with nature and the outdoors	49%	49%	49%	36%	55%	52%
	44%	33%	56%	32%	56%	38%
Bonding with friends or family	48%	5%	48%	47%	59%	54%
	47%	9%	53%	43%	56%	49%
Solitude and personal reflection	43%	53%	36%	21%	41%	51%
	37%	36%	27%	23%	37%	43%
Wildlife encounters and natural discovery	33%	19%	31%	43%	38%	31%
	38%	12%	46%	51%	42%	33%

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

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

Base: all motorcyclists (n=416; past visitors n=211). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All motorcyclists | Traveller types are defined on slide 10

Camaraderie, fitness and tradition motivate similar shares of past visitors and motorcyclists overall.

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

Motivation	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Camaraderie or connection with other motorcycling enthusiasts	32%	13%	13%	25%	35%	49%
	29%	17%	12%	23%	34%	43%
Physical fitness and health	20%	8%	21%	48%	29%	9%
	26%	11%	33%	52%	35%	9%
Tradition or cultural heritage related to the activity	17%	13%	10%	32%	17%	14%
	20%	20%	10%	35%	20%	13%
Other	<1%	0%	0%	0%	0%	1%
	1%	0%	0%	0%	0%	3%

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

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

Base: all motorcyclists (n=416; past visitors n=211). M1 What are your primary motivations for taking motorcycling trips? Please select all that apply.
"Not sure" (1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – MARKET (1 OF 5)

All motorcyclists

Past visitors consider Colorado (22%), California (23%), Texas (20%) and Michigan (19%) at similar rates to motorcyclists overall.

Significance is not shown for these U.S.-only destinations.

Destination	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Colorado	30%	–	–	37%	54%
	22%	–	–	31%	35%
California	26%	–	–	31%	48%
	23%	–	–	29%	51%
Texas	24%	–	–	28%	50%
	20%	–	–	26%	51%
Michigan	23%	–	–	34%	17%
	19%	–	–	29%	19%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – MARKET (2 OF 5)

All motorcyclists

British Columbia, New York, Pennsylvania and Wisconsin are each considered by about one in five past visitors, similar to motorcyclists overall.

Within each market, differences between visitors and the market overall are not significant on these destinations; Ontario and U.S. Fly visitor bases are small.

Destination	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
British Columbia	21%	36%	47%	13%	12%
	22%	32%	28%	18%	19%
New York	19%	–	–	25%	27%
	20%	–	–	29%	31%
Pennsylvania	18%	–	–	26%	18%
	18%	–	–	27%	20%
Wisconsin	18%	–	–	26%	19%
	15%	–	–	22%	15%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – MARKET (3 OF 5)

All motorcyclists

Past visitors are more likely than motorcyclists overall to consider somewhere else in Ontario (26% vs. 17%).

U.S. Drive visitors are more likely than their market overall to consider somewhere else in Ontario (24% vs. 15%).

Destination	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Quebec	18%	41%	34%	12%	10%
	22%	35%	29%	18%	15%
Somewhere else in Ontario	17%	46%	15%	15%	13%
	26% ▲	50%	18%	24% ▲	24%
Alberta	17%	28%	36%	12%	10%
	17%	28%	34%	10%	14%
Ohio	16%	–	–	21%	21%
	17%	–	–	24%	23%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – MARKET (4 OF 5)

All motorcyclists

Minnesota, New Jersey, Illinois and Indiana are each considered by fewer than one in five past visitors.

Significance is not shown for these U.S.-only destinations.

Destination	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Minnesota	15%	–	–	21%	17%
	12%	–	–	18%	19%
New Jersey	12%	–	–	16%	17%
	14%	–	–	19%	24%
Illinois	11%	–	–	14%	15%
	13%	–	–	20%	18%
Indiana	10%	–	–	13%	15%
	12%	–	–	18%	17%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – MARKET (5 OF 5)

All motorcyclists

Past visitors are more likely than motorcyclists overall to consider Manitoba (16% vs. 9%) and Saskatchewan (14% vs. 9%).

Rest of Canada visitors are more likely than their market overall to consider Manitoba (42% vs. 24%).

Destination	Overall (n=416 / 211)	Ontario* (n=36 / 25)	Rest of Canada (n=70 / 40)	U.S. Drive (n=244 / 122)	U.S. Fly* (n=66 / 24)
Manitoba	9%	14%	24%	5%	8%
	16% ▲	14%	42% ▲	7%	14%
Saskatchewan	9%	16%	11%	8%	3%
	14% ▲	14%	19%	13%	9%
Other	11%	23%	21%	7%	10%
	7%	24%	4%	6%	1%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – TRAVELLER TYPE (1 OF 5)

All motorcyclists | Traveller types are defined on slide 10

Past visitors consider the leading U.S. destinations at similar rates to motorcyclists overall.

Significance is not shown for these U.S.-only destinations.

Destination	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Colorado	30%	11%	36%	29%	44%	28%
	22%	5%	22%	26%	35%	20%
California	26%	8%	25%	30%	35%	24%
	23%	6%	17%	30%	30%	17%
Texas	24%	12%	37%	24%	31%	21%
	20%	9%	19%	24%	28%	22%
Michigan	23%	7%	26%	26%	27%	25%
	19%	2%	27%	24%	23%	18%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – TRAVELLER TYPE (2 OF 5)

All motorcyclists | Traveller types are defined on slide 10

British Columbia, New York, Pennsylvania and Wisconsin are each considered by about one in five past visitors.

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

Destination	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
British Columbia	21%	39%	17%	23%	22%	14%
	22%	33%	35%	28%	21%	8%
New York	19%	8%	22%	27%	30%	12%
	20%	12%	16%	28%	28%	11%
Pennsylvania	18%	10%	22%	22%	21%	14%
	18%	2%	22%	20%	22%	17%
Wisconsin	18%	4%	17%	10%	21%	21%
	15%	3%	13%	10%	21%	13%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – TRAVELLER TYPE (3 OF 5)

All motorcyclists | Traveller types are defined on slide 10

Past visitors are more likely than motorcyclists overall to consider somewhere else in Ontario (26% vs. 17%).

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

Destination	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Quebec	18%	21%	21%	23%	19%	12%
	22%	25%	39%	23%	23%	10%
Somewhere else in Ontario	17%	14%	12%	30%	21%	16%
	26% ▲	25%	26%	37%	26%	24%
Alberta	17%	28%	11%	15%	16%	18%
	17%	30%	18%	19%	12%	10%
Ohio	16%	3%	20%	12%	23%	11%
	17%	3%	23%	9%	27%	10%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – TRAVELLER TYPE (4 OF 5)

All motorcyclists | Traveller types are defined on slide 10

Minnesota, New Jersey, Illinois and Indiana are each considered by fewer than one in five past visitors.

Significance is not shown for these U.S.-only destinations.

Destination	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Minnesota	15%	6%	10%	13%	22%	18%
	12%	3%	11%	11%	20%	10%
New Jersey	12%	8%	10%	14%	16%	8%
	14%	5%	12%	15%	19%	9%
Illinois	11%	11%	12%	9%	16%	7%
	13%	9%	20%	9%	20%	9%
Indiana	10%	4%	12%	16%	15%	6%
	12%	6%	16%	13%	17%	6%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: DESTINATIONS CONSIDERED – TRAVELLER TYPE (5 OF 5)

All motorcyclists | Traveller types are defined on slide 10

Past visitors are more likely to consider Manitoba (16% vs. 9%) and Saskatchewan (14% vs. 9%).

Older friend group visitors are more likely than older friend groups overall to consider Manitoba (21% vs. 9%).

Destination	Overall (n=416 / 211)	Solo* (n=44 / 25)	Partners* (n=76 / 29)	Younger Families (n=41 / 33)	Younger Friends (n=85 / 50)	Older Friends (n=141 / 54)
Manitoba	9%	23%	7%	9%	8%	9%
	16% ▲	34%	14%	9%	8%	21% ▲
Saskatchewan	9%	4%	10%	17%	9%	4%
	14% ▲	2%	27%	21%	8%	8%
Other	11%	15%	14%	0%	3%	18%
	7%	8%	10%	0%	2%	15%

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

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

Base: all motorcyclists (n=416; past visitors n=211). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.