CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE II
Avid ORV Riders: All ORV Riders Report

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

October 16th, 2026

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

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

50 Carroll Street, Toronto, Ontario

www.crg.ca

CONTEXT IS EVERYTHING

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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 ORV riding 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 ORV Rider: The respondents who ride off-road vehicles (ORVs), have an ORV operator's license or trail permit (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 ORV Riders: n=367

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

Median Length of Interview:
- 20.7 minutes



REGIONAL SAMPLE SIZE

Regional Sample Size

Total	367
Canada	88
Ontario	23
Quebec	16
Manitoba	12
Alberta	21
British Columbia	16

U.S. Drive	226
Illinois	31
Ohio	27
New York	32
Michigan	35
Wisconsin	29
Minnesota	14
Pennsylvania	28
Indiana	15
New Jersey	15

U.S. Fly	53
California	18
Colorado	21
Texas	14



METHODOLOGY

Survey Language:
The survey was administered in English and French

Margin of Error:
Avid ORV Riders: ± 5.1%

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 ORV rider: Aged 30–64, rides off-road vehicles (ORVs), holds an ORV operator's licence or trail permit (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). Ontario riders are included in Overall but not shown separately because of small sample size.

Past visitors: Respondents who have visited Northern Ontario for an ORV trip in the past five years (64% of avid ORV riders, n=236).

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 ORV Riders report (this report)
All avid ORV riders, n=367

Covers who avid ORV riders 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 ORV riding segment, including those who have not yet visited Northern Ontario.

Past Visitors report
Avid ORV riders who have visited Northern Ontario for ORV riding in the past five years, n=236

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 ORV riders on key measures.

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

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



TRAVELLER TYPE SEGMENTS

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

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

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

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

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

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

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



NORTHERN ONTARIO - REGIONS

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

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

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

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

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





EXECUTIVE SUMMARY



EXECUTIVE SUMMARY – PROFILE & TRIP BEHAVIOUR

ALL AVID ORV RIDERS

ORV riding is a social sport built on families and friends. ATVs (77%), side-by-sides (51%) and dirt bikes (36%) lead, with dirt bikes more common among younger families (49%), and 90% own their machine. Four in ten (39%) were introduced by friends or peers, rising to 53% of younger friend groups, and younger families are the largest traveller type (33% of the estimated market). Eight in ten (80%) say ORVing is central to who they are, falling to 65% of older friend groups, while only 16% of Rest of Canada riders strongly agree, and 39% have been riding for more than 10 years. (See slides 28, 34, 36–39, 43–45)

Riders travel far and across a long season, with fall the standout. They average 4.7 overnight trips a year of 3.8 nights and are willing to travel 10.0 hours one way, rising to 12.3 hours among younger families. Summer (75%) and fall (67%) are the preferred seasons, with spring at 53%. Most drive their own vehicle (68%) and 68% tow a trailer, while younger families are more likely to fly to a regional hub and drive on (25%). Most ride self-guided (57%), but 45% of younger families mix guided and self-guided riding. (See slides 40, 41, 49–53, 56, 57)

Planning blends personal networks, search and social media. Word of mouth (54%), internet search (48%) and social media content (46%) lead, and Facebook and YouTube (81% each) are the main platforms among social media users, with younger families more likely to use Snapchat (36%). Most book directly with accommodation providers (59%), younger families are more likely to use travel agents (27%), and 61% are likely to use AI to plan a future trip, rising to 74% of younger families. Half (51%) have used a certified trail network, falling to 32% of older friend groups. (See slides 63–72, 74, 76)



EXECUTIVE SUMMARY – MOTIVATIONS, VALUES & BARRIERS

ALL AVID ORV RIDERS

Nature, escape and bonding drive ORV trips. Connection with nature (62%), escape (62%) and bonding with friends or family (61%) lead, followed by new places (59%), exploring trails (55%) and thrill (55%); U.S. Drive riders are less likely to ride for fitness (17%). Scenic driving and Northern Lights viewing (52% each) are the strongest add-ons, while younger families are more drawn to youth or family introduction programs (35%) and all-inclusive packages (48%). (See slides 78–85)

Certification carries particular weight. More than eight in ten (83%) say an ORV-friendly certification is important, and 90% say supporting local businesses matters when choosing a destination. Nearly nine in ten (88%) feel a personal responsibility to protect the places they visit, and 82% are interested in contributing to wildlife conservation. Younger families are more likely to seek out eco-friendly options (74%), while Rest of Canada riders are less likely to pay more for a conservation benefit (44%). (See slides 75, 102–105)

Barriers are broad rather than dominated by one issue. Cost (31%), expensive permits (30%) and wildfires (29%) lead, followed by weather, transportation costs, poor value, safety and access (27% to 28% each). Older friend groups are more likely to cite poor value (50%), while younger friend groups are less likely to cite poor value (13%) or expensive permits (15%). Rest of Canada riders are more likely to cite insects (37%), and U.S. Drive riders less likely to cite poor value (21%) or insects (8%). For riders concerned about safety, safety means being reachable: 22% mention getting home safely when describing a successful trip, and they are more likely to rate connectivity important (90% vs. 72%). (See slides 86, 134–141)



EXECUTIVE SUMMARY – DESTINATION STRENGTH & FUTURE DEMAND

ALL AVID ORV RIDERS

Northern Ontario's ORV product is highly rated. Among those who know the region, 93% rate it 4 or 5 out of 5, and 93% agree it has excellent ORV trails and backcountry terrain, with no significant differences by market or traveller type. Variety of routes (93%) and safety (92%) are the leading decision factors; younger families place more importance on ORV events (63%), and younger friend groups less on clear permit requirements (77%). (See slides 109, 113, 114, 121–124)

Familiarity is lowest among older friend groups. Only 17% of older friend groups know a lot about Northern Ontario, against 46% of younger families, and older friend groups are the least likely to say they know enough to plan a trip (61%), against 88% of U.S. Drive riders. (See slides 107, 108, 111, 112)

Advocacy and intent are strong, except among older friend groups and U.S. Fly riders. The Net Promoter Score is 43, ranging from 27 among older friend groups to 51 among older families. Three-quarters (77%) are likely to visit in the next two years, rising to 86% of younger families and 81% of U.S. Drive riders, and falling to 61% of U.S. Fly riders and older friend groups. Eight in ten would make Northern Ontario the only (21%) or primary (58%) destination of a trip, falling to 41% primary among younger friend groups. (See slides 110, 118–120)

Riders want road access and campground or cottage stays. Nine in ten (89%) prefer road-accessible areas, and older friend groups show little interest in train-in access (6%). Designated campgrounds (47%), short-term rentals (47%), drive-in lodges (46%) and commercial cottages (44%) are the preferred lodging, with older families favouring commercial cottages (61%). (See slides 125–128)



EXECUTIVE SUMMARY – ESTABLISHED AUDIENCES & FUTURE GROWTH

ALL AVID ORV RIDERS

ORV riding balances an established base of older families with younger families driving future growth. Older families make up 24% of the estimated market and remain an important part of it, although their trip frequency in Northern Ontario is generally stable or declining. Younger families are already the largest traveller type (33%), and they show the highest intent and the strongest growth in Northern Ontario trips. (See slides 28 and 118, and slide 20 of the Past Visitors report)

Older families are a committed, high-value base. Three-quarters (73%) are likely to visit in the next two years, 93% of those who know Northern Ontario rate it 4 or 5 out of 5, and their Net Promoter Score is 51. Escape (71%) and bonding (69%) motivate them, scenic driving (65%) and multi-stop itineraries (40%) would enhance their trips, and they prefer commercial cottages or cabins (61%). They plan through word of mouth (58%) and official tourism websites (48%), and addressing wildfire (41%) and permit-cost (37%) concerns would help keep them coming. (See slides 66, 80, 81, 84, 85, 109, 110, 118, 128, 138)

Younger families want packaged family experiences. They take 5.1 ORV trips a year and 86% are likely to visit in the next two years. Bonding (61%) and escape (60%) lead their motivations, all-inclusive packages (48%) and youth or family introduction programs (35%, against 20% overall) would enhance their trips, 45% mix guided and self-guided riding, and 88% say an ORV-friendly certification is important. They prefer short-term rentals (52%), campgrounds (50%) and private cottages (49%), and plan through social media content (52%), pointing to a lodge-based family package with secure storage and an introductory program. (See slides 40, 57, 66, 75, 80, 81, 84, 85, 118, 128)



EXECUTIVE SUMMARY – SPEND, YIELD & ECONOMIC POTENTIAL

ALL AVID ORV RIDERS

ORV trips to Northern Ontario are high-value. Travel parties spent an average of $4,546 on their most recent trip, about $830 per visitor over 4.6 nights (roughly $180 per visitor per night), and two-thirds (64%) stayed in paid roofed accommodation.

U.S. visitors deliver the highest yield. U.S. Fly riders spend about $1,100 per visitor and U.S. Drive riders about $900, against about $310 for Ontario riders, who take the shortest trips (3.5 nights; U.S. Fly and Ontario bases are small). The U.S. markets make up 85% of the potential market but 92% of its potential value. Rest of Canada riders spend less per trip ($3,059) and are the least likely to stay in paid roofed lodging (49%).

Families spend the most per trip. Older families travel in the largest parties (6.4 people) and spend the most per party ($5,643), about $880 per visitor, while younger families spend about $720 per visitor. Younger friend groups spend the least per trip ($3,498), and older friend groups are the least likely to use paid lodging (36%, small base).

Small gains in visitation or length of stay are worth a lot. Every 1,000 additional U.S. Drive riders would bring about $900,000 in visitor spending and 4,700 visitor nights. Each extra night adds about $180 per visitor, which makes the levers to extend stays (better value, connectivity and better road, trail or water access) economically significant.



SPEND AND LENGTH OF STAY BY MARKET

ALL AVID ORV RIDERS

U.S. riders spend the most per visitor and per night; Ontario riders take the shortest, lowest-spend trips. Rest of Canada riders spend less per trip and are the least likely to stay in paid roofed lodging (49%).

Measure	Overall	Ontario	Rest of Canada	U.S. Drive	U.S. Fly
Average party spend per trip	$4,546	$1,468*	$3,059 ▼	$5,213	$5,751*
Average party size (people)	5.5	4.8	5.0	5.8	5.2
Spend per visitor per trip	$828	$305*	$617	$902	$1,101*
Average nights	4.6	3.5*	4.9	4.7	4.3*
Spend per visitor per night	$181	$87*	$126	$192	$256*
Stayed in paid roofed lodging	64%	60%*	49%	67%	78%*

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



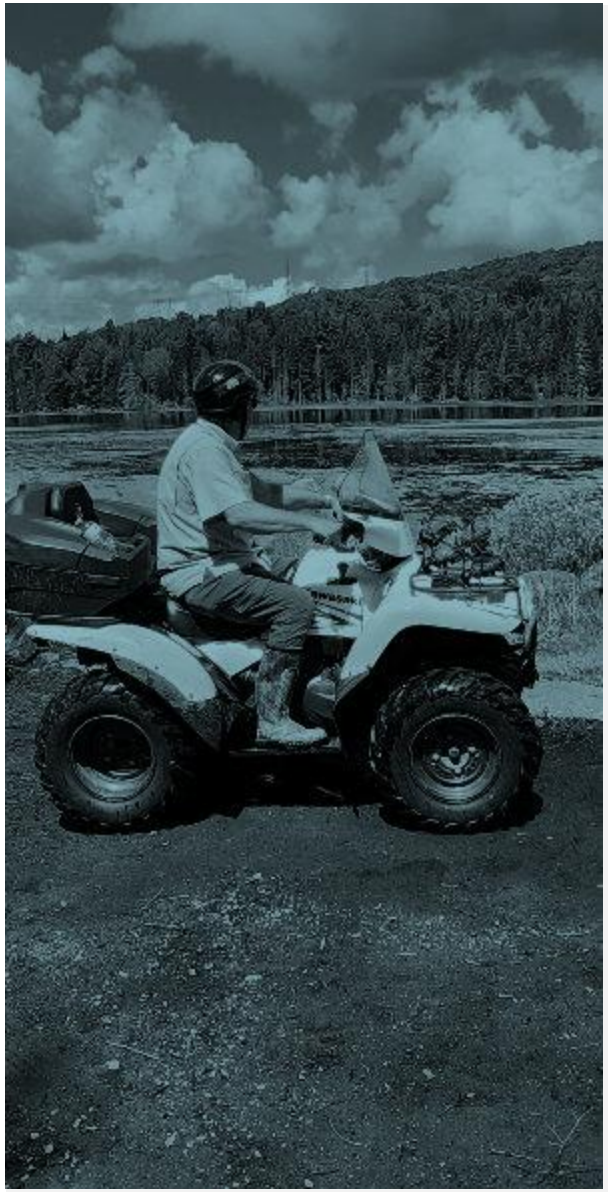
SPEND AND LENGTH OF STAY BY TRAVELLER TYPE

ALL AVID ORV RIDERS

Older families spend the most per trip; younger friend groups spend the least. Older friend groups spend the most per person but are the least likely to stay in paid roofed lodging (small base).

Measure	Overall	Younger families	Older families	Younger friends	Older friends
Average party spend per trip	$4,546	$4,454	$5,643	$3,498	$5,307*
Average party size (people)	5.5	6.2	6.4	4.7	5.3
Spend per visitor per trip	$828	$716	$882	$748	$997*
Average nights	4.6	4.9	4.6	4.1	5.1*
Spend per visitor per night	$181	$147	$191	$184	$195*
Stayed in paid roofed lodging	64%	71%	59%	70%	36%*

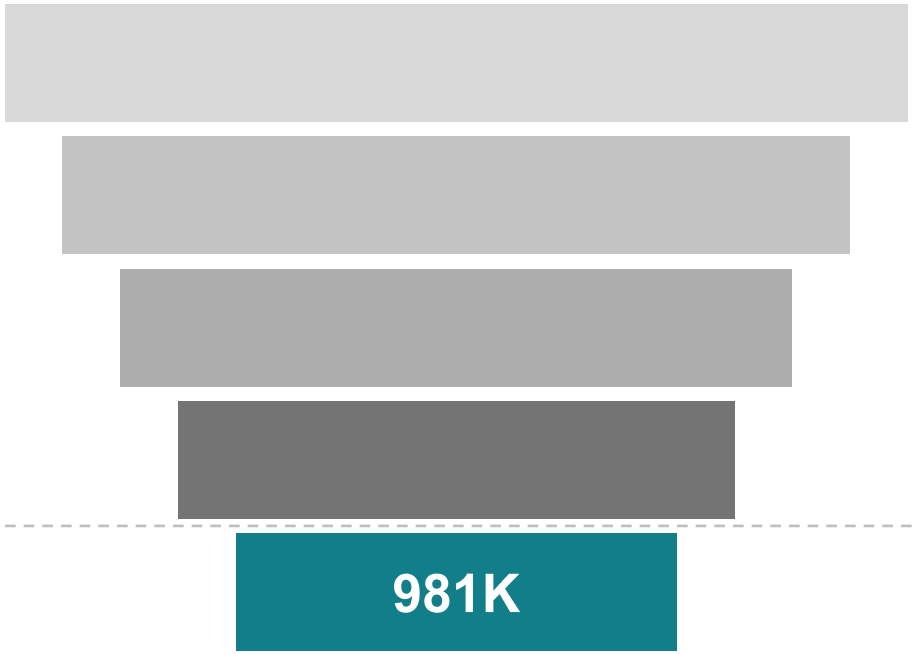
Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than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



MARKET SUMMARY

HOW THE OPPORTUNITY POOL IS BUILT: AVID ORV RIDERS

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



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

Recreational ORV riders
Residents who ride an off-road vehicle recreationally.

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

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

Opportunity pool
ORV riders who intend to visit Northern Ontario for an ORV trip within the next two years.

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

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

ESTIMATED NORTHERN ONTARIO OPPORTUNITY POOL: AVID ORV RIDERS

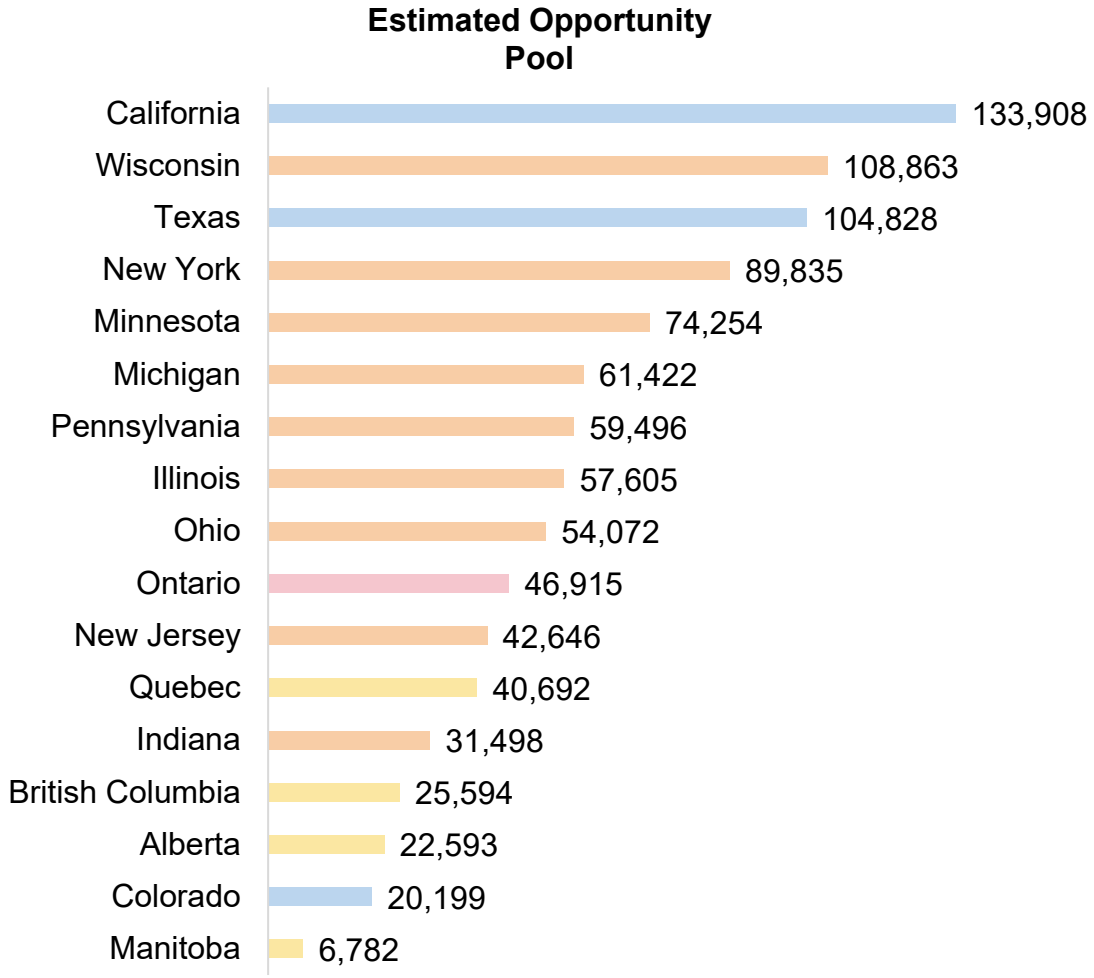
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO
46,915

Rest of Canada
95,660

U.S. Drive
579,691

U.S. Fly
258,936



Avid ORV riders aged 30–64 in the surveyed markets who told us they intend to take an ORV trip to Northern Ontario in the next two years. Not a forecast of visitors. All markets: 981,202.

INCREMENTAL VISITOR SPEND: AVID ORV RIDERS

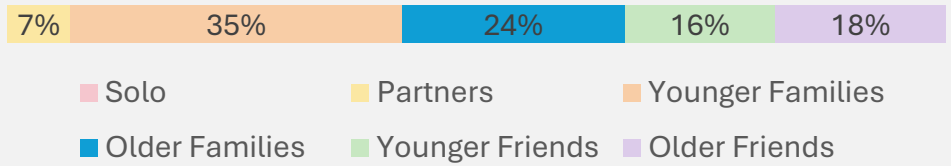
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO **46,915** Opportunity pool	**1,000** additional visitors	×	**$305** spend per visitor*	=	**$305K** incremental visitor spend
Rest of Canada **95,660** Opportunity pool	**1,000** additional visitors	×	**$617** spend per visitor	=	**$617K** incremental visitor spend
U.S. Drive **579,691** Opportunity pool	**1,000** additional visitors	×	**$902** spend per visitor	=	**$902K** incremental visitor spend
U.S. Fly **258,936** Opportunity pool	**1,000** additional visitors	×	**$1,101** spend per visitor*	=	**$1.10M** incremental visitor spend

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

REST OF CANADA – ORV

ESTIMATED OPPORTUNITY POOL: 95,660



HOW THEY TRAVEL

- Rest of Canada riders visit often but spend the least per trip and are the most sensitive to value and transportation costs.
- 71% have ridden in Northern Ontario in the past five years, averaging 1.4 trips.
- Their most recent trip lasted 4.9 nights at $3,059 per party (the lowest of any market), and 49% stayed in paid roofed lodging.
- Commercial cottages or cabins (52%) and backcountry camping (51%) are the preferred lodging options.
- Superior Country (46%) and Northeast Ontario (32%) are the most visited regions, and summer (67%) and fall (60%) the preferred seasons. (See slides 49, 127, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Connection with nature (69%) and escape from everyday stress (66%) are the leading motivations.
- Experiencing new places follows (65%).
- Scenic driving (60%) and Northern Lights viewing (42%) are the strongest add-on experiences. (See slides 78–79, 82)

WHAT THEY VALUE

- Supporting local businesses (91%) and minimal environmental impact (89%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (71%) and paying more for a clear conservation benefit (44%) are lower than in the segment.
- 74% say a recognized certification or designation is important. (See slides 75, 102, 104)

WHAT HOLDS THEM BACK

- Poor value for money (44%), transportation costs (43%) and cost (39%) are the leading barriers.
- Insects weighs more than for the segment overall (37% vs. 14%).
- 58% say financial pressures have affected their travel plans. (See slides 134–137, 142)

WHAT WOULD GROW THEM

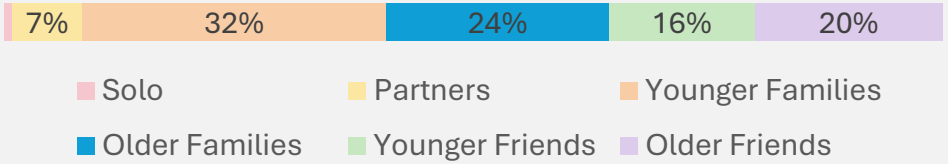
- Better connectivity (32%), more accommodation availability (25%) and improved access infrastructure (25%) would most encourage longer stays.
- 72% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 45 (segment 43). (See slides 110, 118, 129–130)

WHERE TO REACH THEM

- Word of mouth (59%), general search (57%) and social media content (47%) are the leading planning sources.
- Among social media users, Facebook (94%), YouTube (69%) and Instagram (68%) lead.
- 43% are likely to use AI tools to plan their next trip. (See slides 63, 69, 74)

U.S. DRIVE – ORV

ESTIMATED OPPORTUNITY POOL: 579,691



HOW THEY TRAVEL
- U.S. Drive riders are the largest market and the most likely to return.
- 62% have ridden in Northern Ontario in the past five years, averaging 1.9 trips.
- Their most recent trip lasted 4.7 nights at $5,213 per party, and 67% stayed in paid roofed lodging.
- Short-term rentals (48%) and drive-in lodges or resorts (48%) are the preferred lodging options.
- Algoma Country (29%) and Northeast Ontario (28%) are the most visited regions, and summer (78%) and fall (69%) the preferred seasons. (See slides 49, 127, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Bonding with friends or family (61%) and escape from everyday stress (61%) are the leading motivations.
- Physical fitness and health matters less than in the segment overall (17% vs. 24%).
- Northern Lights viewing (54%) and scenic driving (49%) are the strongest add-on experiences. (See slides 78, 82)

WHAT THEY VALUE
- Supporting local businesses (90%) and conservation (86%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (74%) and paying more for a clear conservation benefit (72%) compare with 73% and 68% for the segment.
- 86% say a recognized certification or designation is important. (See slides 75, 102, 104)

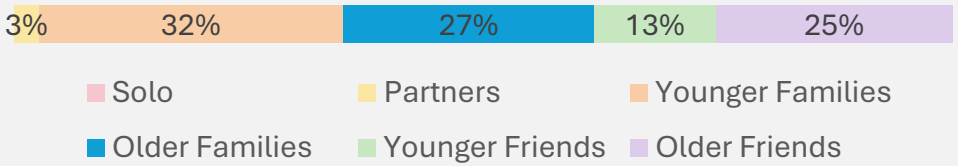
WHAT HOLDS THEM BACK
- Safety concerns (29%), cost (29%) and expensive licensing or permits (28%) are the leading barriers.
- Poor value for money is less of a concern (21% vs. 27%).
- 54% say financial pressures have affected their travel plans. (See slides 134–135, 137, 142)

WHAT WOULD GROW THEM
- Better value (32%), more for travel companions to do (30%) and more packaged experiences (28%) would most encourage longer stays.
- 81% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 45 (segment 43). (See slides 110, 118, 129)

WHERE TO REACH THEM
- Word of mouth (53%), social media content (44%) and general search (43%) are the leading planning sources.
- Among social media users, YouTube (85%), Facebook (80%) and Instagram (60%) lead.
- 62% are likely to use AI tools to plan their next trip. (See slides 63, 69, 74)

U.S. FLY – ORV

ESTIMATED OPPORTUNITY POOL: 258,936



HOW THEY TRAVEL

- U.S. Fly riders spend the most per trip but are the least likely to visit in the next two years.
- 55% have ridden in Northern Ontario in the past five years, averaging 1.7 trips.
- Their most recent trip lasted 4.3 nights at $5,751 per party, and 78% stayed in paid roofed lodging (small base).
- Designated campgrounds (62%) and drive-in lodges or resorts (56%) are the preferred lodging options.
- Sunset Country (29%) and The Great Canadian Wilderness (29%) are the most visited regions, and summer (77%) and fall (71%) the preferred seasons. (See slides 49, 118, 127, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Connection with nature (75%) and experiencing new places (65%) are the leading motivations.
- Thrill and adventure follows (64%).
- Northern Lights viewing (54%) and scenic driving (51%) are the strongest add-on experiences. (See slides 78–79, 82)

WHAT THEY VALUE

- Supporting local businesses (96%) and minimal environmental impact (90%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (69%) and paying more for a clear conservation benefit (78%) compare with 73% and 68% for the segment.
- 79% say a recognized certification or designation is important. (See slides 75, 102, 104)

WHAT HOLDS THEM BACK

- Poor road, trail or water access (35%), cost (35%) and poor value for money (31%) are the leading barriers.
- 39% say financial pressures have affected their travel plans. (See slides 134–135, 142)

WHAT WOULD GROW THEM

- Quality paid accommodation (48%), better value (47%) and secure storage (43%) would most encourage longer stays (small base).
- 61% are likely to visit in the next two years (the lowest of any market).
- Among those who know the region, Northern Ontario's NPS is 36 (segment 43). (See slides 110, 118, 129–130)

WHERE TO REACH THEM

- General search (59%), word of mouth (56%) and social media content (55%) are the leading planning sources.
- Among social media users, Instagram (88%), Facebook (80%) and YouTube (76%) lead.
- 70% are likely to use AI tools to plan their next trip. (See slides 63, 69, 74)



TRAVELLER TYPE SUMMARY

ESTIMATED OPPORTUNITY POOL BY TRAVELLER TYPE: AVID ORV RIDERS

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

SOLO
4,960

YOUNGER FAMILIES
321,889

YOUNGER FRIENDS
144,558

PARTNERS
66,660

OLDER FAMILIES
234,854

OLDER FRIENDS
208,280

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

YOUNGER FAMILIES – ORV

ESTIMATED OPPORTUNITY POOL: 321,889

WHO THEY ARE
- Younger families are the growth engine: the largest traveller type and the most frequent visitors.
- 98% have children under 18 at home, and the largest age group is 35 to 44 (72%).
- 32% have been ORVing for more than 10 years, and 87% say it is central to who they are. (See slides 35, 45)

HOW THEY TRAVEL
- 76% have ridden in Northern Ontario in the past five years (the highest of any traveller type), averaging 2.6 trips.
- Their most recent trip lasted 4.9 nights at $4,454 per party, and 71% stayed in paid roofed lodging.
- Short-term rentals (52%) and designated campgrounds (50%) are the preferred lodging options.
- The Great Canadian Wilderness (43%) and Northeast Ontario (38%) are the most visited regions, and summer (76%) and fall (70%) the preferred seasons. (See slides 50, 128, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Bonding with friends or family (61%) and escape from everyday stress (60%) are the leading motivations.
- Connection with nature follows (58%).
- Northern Lights viewing (51%) and all-inclusive packages (48%) are the strongest add-on experiences. (See slides 80–81, 84)

WHAT THEY VALUE
- Supporting local businesses (92%) and conservation (87%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (77%) and paying more for a clear conservation benefit (76%) compare with 73% and 68% for the segment.
- 88% say a recognized certification or designation is important. (See slides 75, 103, 105)

WHAT HOLDS THEM BACK
- Cost (31%), transportation costs (30%) and wildfires and other disruptions (28%) are the leading barriers.
- 54% say financial pressures have affected their travel plans. (See slides 138, 142)

WHAT WOULD GROW THEM
- Better value (39%), improved access infrastructure (37%) and secure storage (36%) would most encourage longer stays.
- 86% are likely to visit in the next two years (the highest of any traveller type).
- Among those who know the region, Northern Ontario's NPS is 48 (segment 43). (See slides 110, 118, 131)

WHERE TO REACH THEM
- Social media content (52%), general search (49%) and word of mouth (48%) are the leading planning sources.
- Among social media users, Facebook (84%), YouTube (82%) and Instagram (69%) lead.
- 74% are likely to use AI tools to plan their next trip (the highest of any traveller type). (See slides 66, 70, 74)

OLDER FAMILIES – ORV

ESTIMATED OPPORTUNITY POOL: 234,854

WHO THEY ARE
- Older families spend the most per trip and are the most interested in packaged experiences.
- 77% have children under 18 at home, and the largest age group is 45 to 54 (72%).
- 44% have been ORVing for more than 10 years, and 77% say it is central to who they are. (See slides 35, 45)

HOW THEY TRAVEL
- 67% have ridden in Northern Ontario in the past five years, averaging 1.7 trips.
- Their most recent trip lasted 4.6 nights at $5,643 per party, and 59% stayed in paid roofed lodging.
- Commercial cottages or cabins (61%) and designated campgrounds (55%) are the preferred lodging options.
- Superior Country (39%) and Sunset Country (29%) are the most visited regions, and summer (79%) and fall (66%) the preferred seasons. (See slides 50, 128, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Escape from everyday stress (71%) and bonding with friends or family (69%) are the leading motivations.
- Connection with nature follows (65%).
- Scenic driving (65%) and Northern Lights viewing (49%) are the strongest add-on experiences. (See slides 80–81, 84)

WHAT THEY VALUE
- Supporting local businesses (90%) and community benefit (85%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (72%) and paying more for a clear conservation benefit (60%) compare with 73% and 68% for the segment.
- 82% say a recognized certification or designation is important. (See slides 75, 103, 105)

WHAT HOLDS THEM BACK
- Wildfires and other disruptions (41%), expensive licensing or permits (37%) and weather or season timing (35%) are the leading barriers.
- 71% say financial pressures have affected their travel plans. (See slides 138, 142)

WHAT WOULD GROW THEM
- More packaged experiences (34%), better connectivity (31%) and more accommodation availability (30%) would most encourage longer stays.
- 73% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 51 (segment 43). (See slides 110, 118, 131–132)

WHERE TO REACH THEM
- Word of mouth (58%), general search (50%) and official tourism websites (48%) are the leading planning sources.
- Among social media users, YouTube (89%), Facebook (81%) and Instagram (71%) lead.
- 50% are likely to use AI tools to plan their next trip. (See slides 66, 70, 74)

YOUNGER FRIENDS – ORV

ESTIMATED OPPORTUNITY POOL: 144,558

WHO THEY ARE
- Younger friend groups are newer riders and the least put off by value or permit costs.
- 50% have children under 18 at home, and the largest age group is 35 to 44 (75%).
- 29% have been ORVing for more than 10 years, and 88% say it is central to who they are. (See slides 35, 45)

HOW THEY TRAVEL
- 67% have ridden in Northern Ontario in the past five years, averaging 2.3 trips.
- Their most recent trip lasted 4.1 nights at $3,498 per party, and 70% stayed in paid roofed lodging.
- Backcountry camping (47%) and drive-in lodges or resorts (40%) are the preferred lodging options.
- Northeast Ontario (37%) and Sunset Country (26%) are the most visited regions, and summer (75%) and spring (58%) the preferred seasons. (See slides 50, 128, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Connection with nature (61%) and experiencing new places (59%) are the leading motivations.
- Escape from everyday stress follows (55%).
- Wildlife viewing (46%) and multi-activity packages (40%) are the strongest add-on experiences. (See slides 80–81, 84)

WHAT THEY VALUE
- Supporting local businesses (88%) and conservation (84%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (75%) and paying more for a clear conservation benefit (70%) compare with 73% and 68% for the segment.
- 79% say a recognized certification or designation is important. (See slides 75, 103, 105)

WHAT HOLDS THEM BACK
- Cost (30%), weather or season timing (27%) and safety concerns (25%) are the leading barriers.
- Poor value for money is less of a concern (13% vs. 27%).
- 45% say financial pressures have affected their travel plans. (See slides 138–139, 142)

WHAT WOULD GROW THEM
- Improved access infrastructure (32%), more packaged experiences (28%) and better trail conditions (28%) would most encourage longer stays.
- 80% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 38 (segment 43). (See slides 110, 118, 131)

WHERE TO REACH THEM
- Social media content (46%), word of mouth (43%) and general search (37%) are the leading planning sources.
- Among social media users, Facebook (79%), Instagram (76%) and YouTube (72%) lead.
- 68% are likely to use AI tools to plan their next trip. (See slides 66, 70, 74)

OLDER FRIENDS – ORV

ESTIMATED OPPORTUNITY POOL: 208,280

WHO THEY ARE
- Older friend groups are the least engaged traveller type, with the lowest visitation and intent to visit.
- 22% have children under 18 at home, and the largest age group is 45 to 54 (55%).
- 55% have been ORVing for more than 10 years, and 65% say it is central to who they are (the lowest of any traveller type). (See slides 35, 45)

HOW THEY TRAVEL
- 40% have ridden in Northern Ontario in the past five years (the lowest of any traveller type), averaging 1.0 trips.
- Their most recent trip lasted 5.1 nights at $5,307 per party, and 36% stayed in paid roofed lodging (small base).
- Designated campgrounds (53%) and drive-in lodges or resorts (53%) are the preferred lodging options.
- Northeast Ontario (23%) and The Great Canadian Wilderness (14%) are the most visited regions, and summer (72%) and fall (72%) the preferred seasons. (See slides 50, 128, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Connection with nature (74%) and experiencing new places (72%) are the leading motivations.
- Bonding with friends or family follows (71%).
- Scenic driving (68%) and Northern Lights viewing (65%) are the strongest add-on experiences. (See slides 80–81, 84)

WHAT THEY VALUE
- Supporting local businesses (92%) and conservation (90%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (66%) and paying more for a clear conservation benefit (62%) compare with 73% and 68% for the segment.
- 76% say a recognized certification or designation is important. (See slides 75, 103, 105)

WHAT HOLDS THEM BACK
- Poor value for money (50%), expensive licensing or permits (44%) and safety concerns (40%) are the leading barriers.
- 37% say financial pressures have affected their travel plans. (See slides 138–139, 142)

WHAT WOULD GROW THEM
- Better value (43%), better connectivity (26%) and events timed to their travel (23%) would most encourage longer stays (small base).
- 61% are likely to visit in the next two years (the lowest of any traveller type).
- Among those who know the region, Northern Ontario's NPS is 27 (segment 43). (See slides 110, 118, 131–132)

WHERE TO REACH THEM
- Word of mouth (72%), general search (53%) and social media content (40%) are the leading planning sources.
- Among social media users, Facebook (84%), YouTube (84%) and Instagram (47%) lead.
- 49% are likely to use AI tools to plan their next trip. (See slides 66, 70, 74)



TRAVELLER & AVIDITY

YEARS ORVING – MARKET

All ORV riders

Four in ten ORV riders (39%) have been ORVing for more than 10 years, and a third (33%) for 6 to 10 years. A quarter (24%) have been ORVing for 2 to 5 years, and 5% for less than 2 years.

Rest of Canada riders are the most likely to have been ORVing for more than 10 years (50%), although market differences are not significant.

Years ORVing	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Less than 2 years	5%	7%	4%	4%
2 to 5 years	24%	18%	21%	26%
6 to 10 years	33%	26%	37%	28%
More than 10 years	39%	50%	37%	42%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). A1 How many years have you been ORVing as a hobby or recreational pursuit?

YEARS ORVING – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Older friend groups are the most likely to have been ORVing for more than 10 years (55%), and younger friend groups the least likely (29%).

None of the traveller type differences are significant.

Years ORVing	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Less than 2 years	5%	3%	9%	6%	1%
2 to 5 years	24%	28%	14%	22%	23%
6 to 10 years	33%	36%	32%	43%	21%
More than 10 years	39%	32%	44%	29%	55%

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

Base: all ORV riders (n=367). A1 How many years have you been ORVing as a hobby or recreational pursuit?

ORV USED MOST OFTEN – MARKET

All ORV riders

Three-quarters of ORV riders (77%) most often use an ATV, half (51%) a side-by-side or UTV and a third (36%) a dirt bike or off-road motorcycle.

ATV use ranges from 62% among Rest of Canada riders to 87% among U.S. Fly riders, with no significant market differences.

ORV	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
ATV (quad)	77%	62%	78%	87%
Side-by-side / UTV	51%	42%	53%	63%
Dirt bike / off-road motorcycle	36%	24%	38%	42%
Other	3%	4%	3%	1%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). A2 Which of the following best describes the ORV you most often use for ORVing trips? Please select all that apply.

"Not sure" (0%) not shown.

ORV USED MOST OFTEN – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to ride a dirt bike or off-road motorcycle (49%).

ATVs are the most common ORV for every traveller type, from 68% among older friend groups to 83% among older family groups.

ORV	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
ATV (quad)	77%	82%	83%	81%	68%
Side-by-side / UTV	51%	53%	45%	51%	53%
Dirt bike / off-road motorcycle	36%	49% ▲	27%	33%	28%
Other	3%	<1%	3%	5%	6%

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

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

Base: all ORV riders (n=367). A2 Which of the following best describes the ORV you most often use for ORVing trips? Please select all that apply.

"Not sure" (0%) not shown.

ORV OWNERSHIP – MARKET

All ORV riders

Nine in ten ORV riders (90%) own their ORV, 6% rent or borrow when needed and 4% lease.

Ownership ranges from 84% among Rest of Canada riders to 92% among U.S. Fly riders.

Ownership	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Own	90%	84%	90%	92%
Lease	4%	5%	3%	5%
Rent or borrow when needed	6%	11%	6%	3%
Other	0%	0%	0%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). A2B Do you own, lease, or rent your ORV?

ORV OWNERSHIP – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Ownership ranges from 84% among younger families to 94% among older friend groups.

Younger families are the most likely to rent or borrow when needed (10%) or lease (7%).

Ownership	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Own	90%	84%	92%	92%	94%
Lease	4%	7%	3%	1%	2%
Rent or borrow when needed	6%	10%	5%	6%	5%
Other	0%	0%	0%	0%	0%

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

Base: all ORV riders (n=367). A2B Do you own, lease, or rent your ORV?

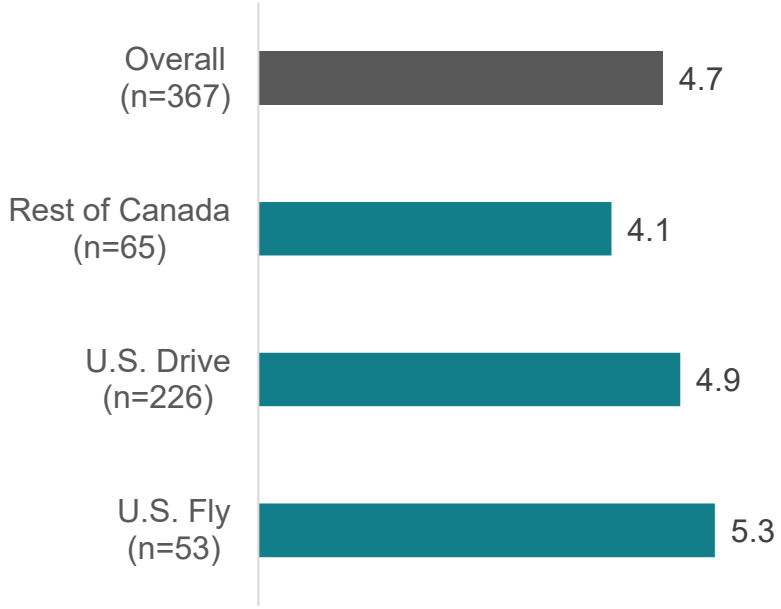
ORVING TRIPS PER YEAR

All ORV riders | Traveller types are defined on slide 10

ORV riders take an average of 4.7 overnight trips per year where ORVing is the primary purpose.

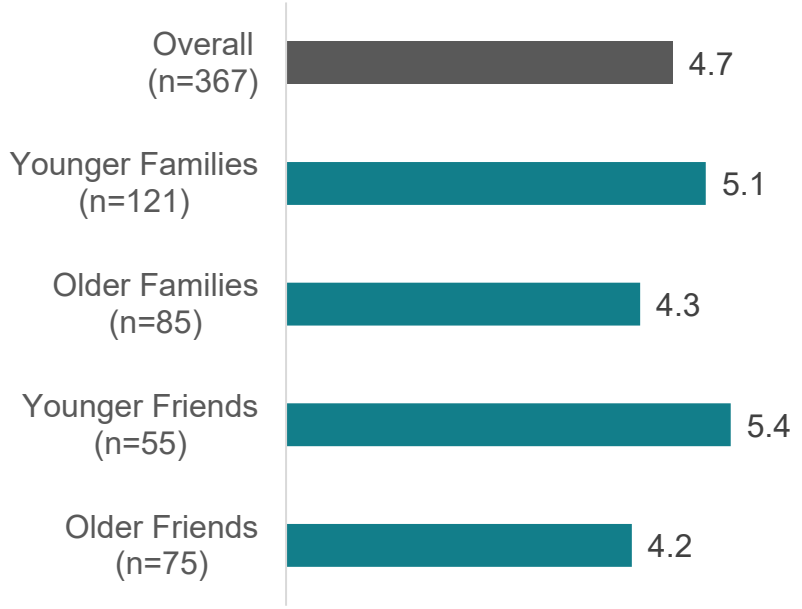
Averages range from 4.1 trips among Rest of Canada riders to 5.3 among U.S. Fly riders, and from 4.2 among older friend groups to 5.4 among younger friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders (n=367). A3 Approximately how many overnight trips per year do you take where ORVing is the primary purpose? AVG = average number of overnight trips per year.

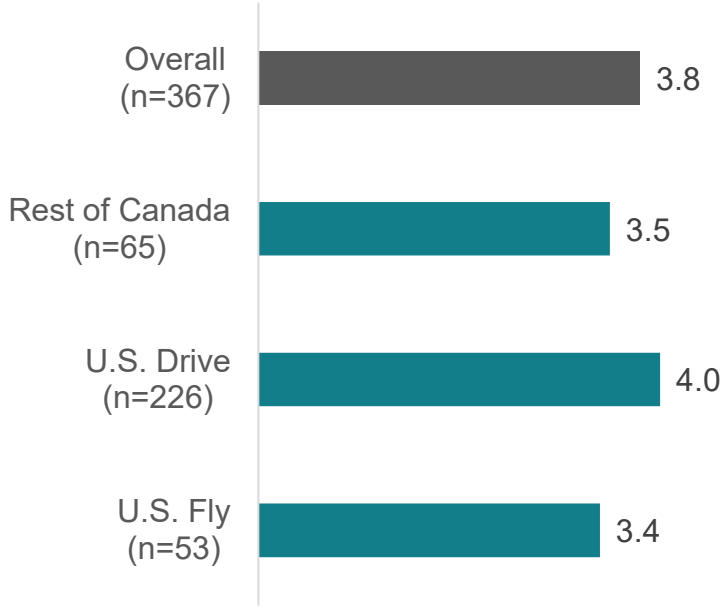
NIGHTS PER ORVING TRIP

All ORV riders | Traveller types are defined on slide 10

ORVing trips last an average of 3.8 nights.

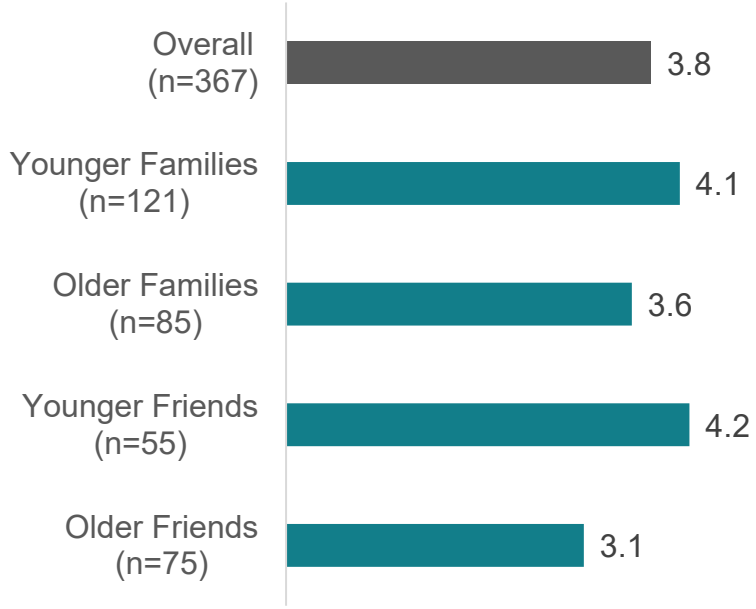
Trip length ranges from 3.4 nights among U.S. Fly riders to 4.0 among U.S. Drive riders, and from 3.1 nights among older friend groups to 4.2 among younger friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

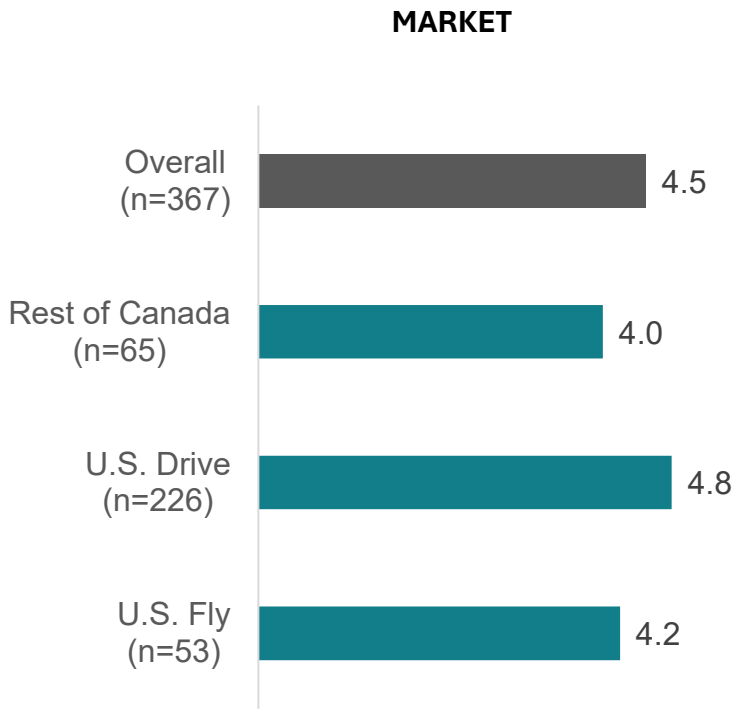
Base: all ORV riders (n=367). A4 How many nights do you typically spend on an ORVing trip? AVG = average number of nights.

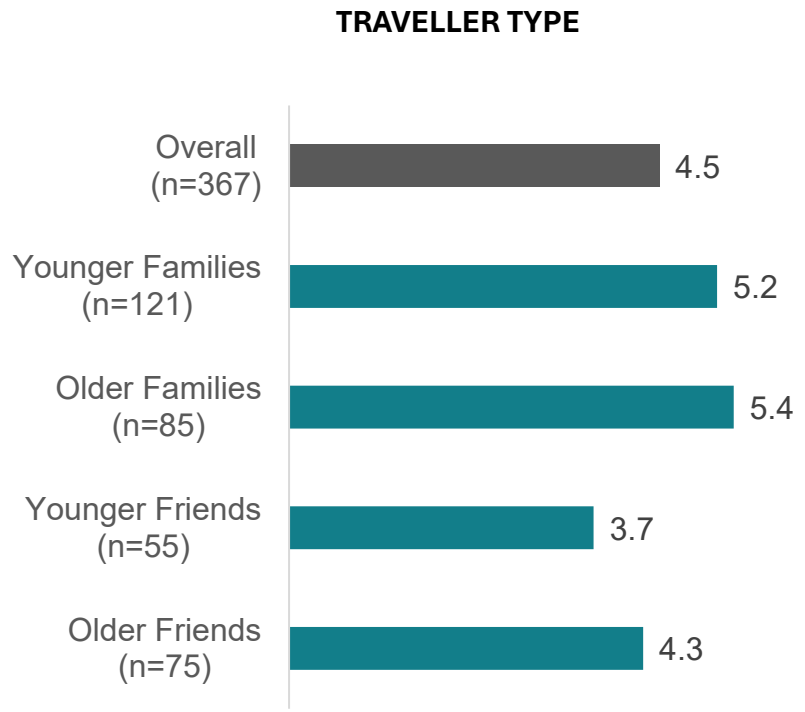
NUMBER OF PEOPLE TRAVELLED WITH ON ORVING TRIPS

All ORV riders | Traveller types are defined on slide 10

ORV riders typically travel with an average of 4.5 people on an ORVing trip.

Families travel in the largest groups, with older families averaging 5.4 people and younger families 5.2, while younger friend groups average 3.7. Among markets, group size ranges from 4.0 among Rest of Canada riders to 4.8 among U.S. Drive riders.





Base: all ORV riders (n=367). A5 How many people do you typically travel with on an ORVing trip? AVG = sum of the average number of people reported for each category (partner or spouse, friends, children, other). Significance testing is not available for the combined average.

FIRST EXPOSURE TO ORVING – MARKET

All ORV riders

ORV riders most often got their first exposure to ORVing through a family member (45%) or friends or peers (39%), and 14% discovered it on their own.

None of the market differences are significant.

First exposure	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
A family member	45%	48%	44%	42%
School, camp, or organized program	2%	3%	2%	2%
Friends or peers	39%	42%	39%	45%
I discovered it on my own	14%	7%	15%	11%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). A9 Where did you get your first exposure to ORVing?
"Not sure" (<1%) not shown.

FIRST EXPOSURE TO ORVING – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Younger families are the most likely to have been introduced by a family member (55%), and younger friend groups by friends or peers (53%).

None of the traveller type differences are significant.

First exposure	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
A family member	45%	55%	50%	32%	39%
School, camp, or organized program	2%	2%	4%	2%	0%
Friends or peers	39%	30%	33%	53%	50%
I discovered it on my own	14%	12%	13%	14%	10%

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

Base: all ORV riders (n=367). A9 Where did you get your first exposure to ORVing?
"Not sure" (<1%) not shown.

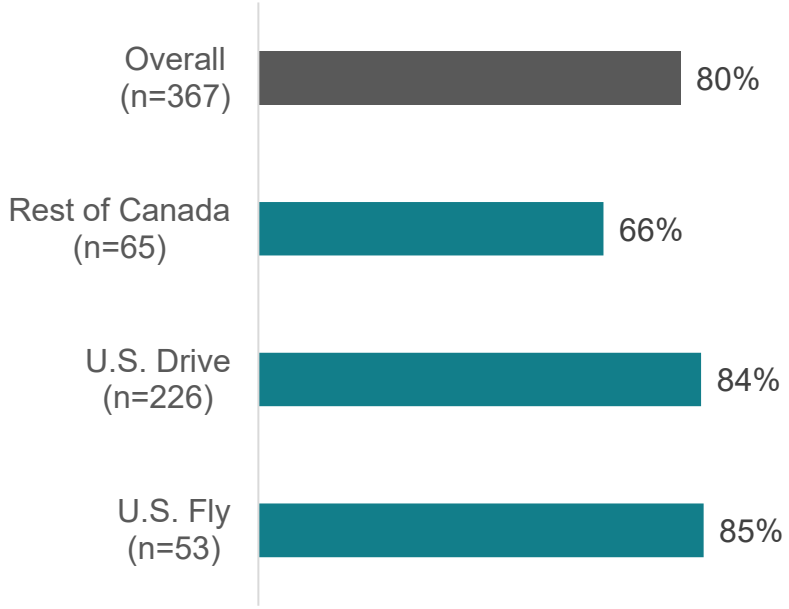
ORVING AS A CENTRAL PART OF IDENTITY

All ORV riders | Traveller types are defined on slide 10

Eight in ten ORV riders (80%) agree that ORVing and ORV culture is a central part of who they are, including 39% who strongly agree.

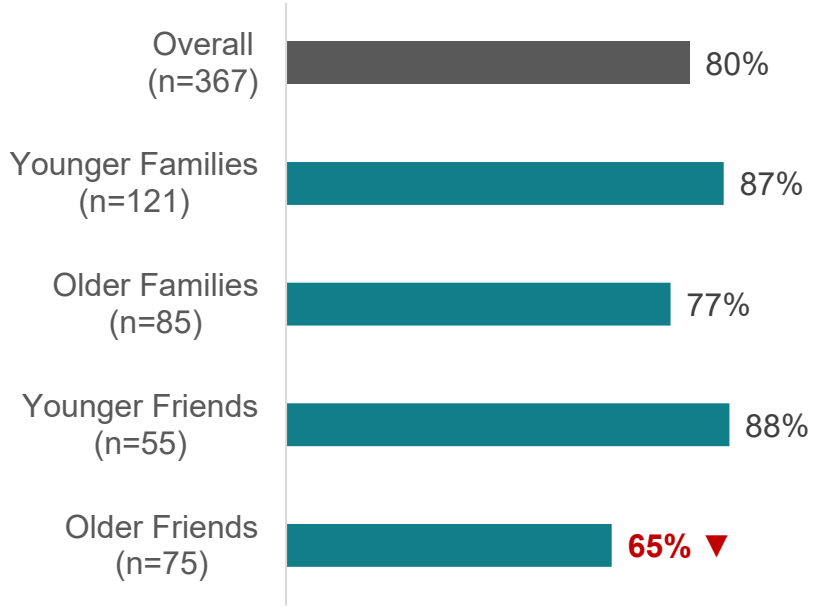
Agreement ranges from 66% among Rest of Canada riders to 85% among U.S. Fly riders. Older friend groups are less likely than other traveller types to agree (65%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders (n=367). T2 (TOP2) How much do you agree or disagree with the following statement? "ORVing and ORV culture is a central part of who I am." TOP2 = % somewhat or strongly agree.

ROLE OF ORVING IN TRAVEL DECISIONS – MARKET

All ORV riders

Two-thirds of ORV riders say ORVing is always (18%) or usually (49%) the primary purpose of their trips.

Rest of Canada riders are the most likely to say it is often a secondary activity (43%), although market differences are not significant.

Role in travel decisions	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
It is always the primary purpose of my trips	18%	9%	20%	25%
It is usually the primary purpose, but not always	49%	46%	51%	43%
It is often a secondary activity alongside other trip purposes	32%	43%	28%	31%
It is rarely the primary purpose of my trips	1%	2%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). T2B Which of the following best describes the role ORVing plays in your travel decisions?

“Not sure” (0%) not shown.

ROLE OF ORVING IN TRAVEL DECISIONS – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Older friend groups are the most likely to say ORVing is often a secondary activity (47%), and younger families the most likely to say it is always the primary purpose (24%).

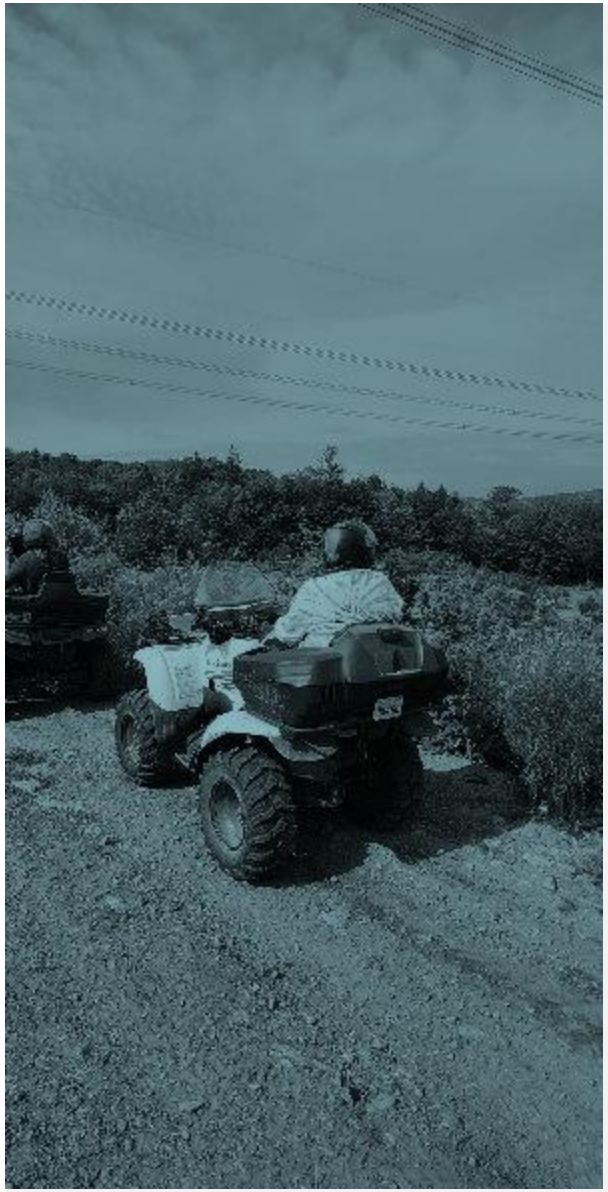
None of the traveller type differences are significant.

Role in travel decisions	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
It is always the primary purpose of my trips	18%	24%	13%	22%	6%
It is usually the primary purpose, but not always	49%	52%	46%	55%	46%
It is often a secondary activity alongside other trip purposes	32%	23%	38%	22%	47%
It is rarely the primary purpose of my trips	1%	1%	3%	0%	0%

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

Base: all ORV riders (n=367). T2B Which of the following best describes the role ORVing plays in your travel decisions?

“Not sure” (0%) not shown.



HOW THEY TRAVEL

PREFERRED SEASON FOR ORVING – MARKET

All ORV riders

Summer (75%) and fall (67%) are the preferred seasons for ORVing, followed by spring (53%), while 18% prefer winter.

Preference for each season is lowest among Rest of Canada riders, although market differences are not significant.

Season	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Winter (December – February)	18%	10%	19%	25%
Spring (March – May)	53%	41%	56%	61%
Summer (June – August)	75%	67%	78%	77%
Fall (September – November)	67%	60%	69%	71%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). T1 What is your preferred season for taking an ORVing trip? Please select all that apply.

"Not sure" (0%) not shown.

PREFERRED SEASON FOR ORVING – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Summer is the top season for every traveller type except older friend groups, who prefer summer and fall equally (72% each).

Older friend groups are the least likely to prefer winter (6%).

Season	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Winter (December – February)	18%	24%	19%	22%	6%
Spring (March – May)	53%	56%	49%	58%	56%
Summer (June – August)	75%	76%	79%	75%	72%
Fall (September – November)	67%	70%	66%	57%	72%

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

Base: all ORV riders (n=367). T1 What is your preferred season for taking an ORVing trip? Please select all that apply.

"Not sure" (0%) not shown.

HOW ORV RIDERS GET TO THEIR DESTINATIONS – MARKET

All ORV riders

Two-thirds of ORV riders get to their destinations by personal vehicle (68%) or with a trailer (68%), and about one in five by RV or motorhome (19%).

Trailer use is highest among U.S. Fly riders (79%) and RV use lowest among Rest of Canada riders (8%), although market differences are not significant.

Mode of travel	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Personal vehicle (car, truck, SUV)	68%	63%	70%	66%
Personal vehicle with trailer (e.g., boat, camper, ATV)	68%	67%	66%	79%
RV / motorhome	19%	8%	22%	23%
Fly to a regional hub, then drive	16%	15%	16%	19%
Float plane or charter flight to a remote destination	8%	1%	8%	11%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). T3 How do you typically get to your ORVing destinations? Please select all that apply. “Not sure” (<1%) not shown.

HOW ORV RIDERS GET TO THEIR DESTINATIONS – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to fly to a regional hub and then drive (25%).

Younger families are also the most likely to travel with a trailer (76%).

Mode of travel	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Personal vehicle (car, truck, SUV)	68%	70%	67%	74%	61%
Personal vehicle with trailer (e.g., boat, camper, ATV)	68%	76%	72%	57%	67%
RV / motorhome	19%	24%	17%	18%	16%
Fly to a regional hub, then drive	16%	25% ▲	6%	19%	13%
Float plane or charter flight to a remote destination	8%	12%	10%	2%	2%

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

Base: all ORV riders (n=367). T3 How do you typically get to your ORVing destinations? Please select all that apply. “Not sure” (<1%) not shown.

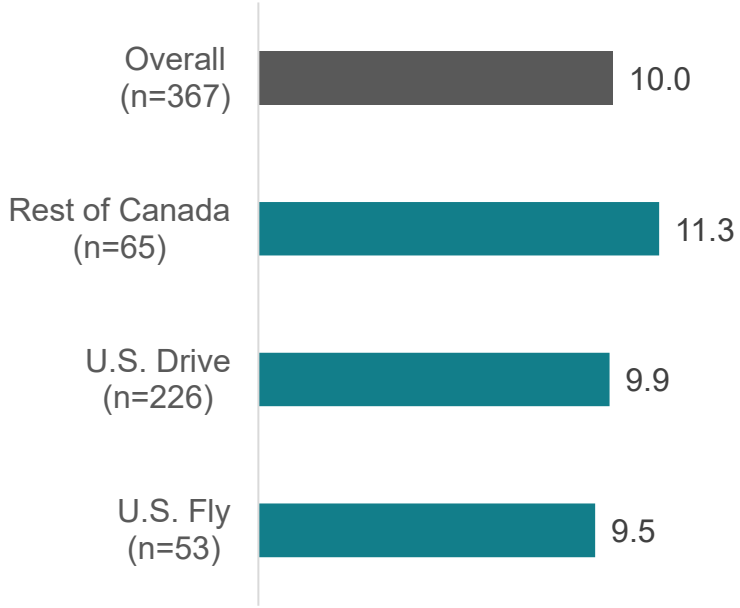
HOURS WILLING TO TRAVEL FOR AN ORVING TRIP

All ORV riders | Traveller types are defined on slide 10

ORV riders are willing to travel an average of 10.0 hours one way for an ORVing trip.

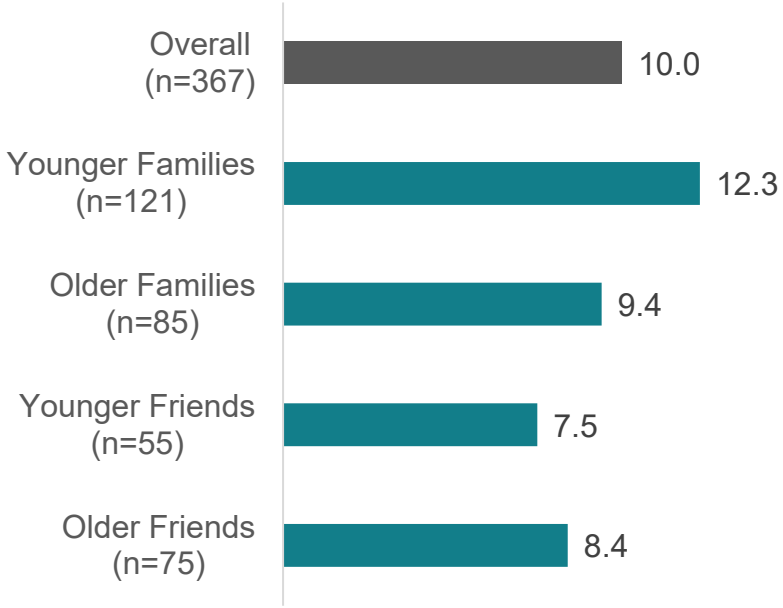
This ranges from 9.5 hours among U.S. Fly riders to 11.3 among Rest of Canada riders, and from 7.5 hours among younger friend groups to 12.3 among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders (n=367). T4 Approximately how many hours are you willing to travel (one way) for an ORVing trip? AVG = average number of hours.

APPROACH TO GEAR AND OUTFITTER USE – MARKET

All ORV riders

Just over half of ORV riders (55%) have their own gear or vehicle and do not use local outfitters or rental operators, while 43% also use them.

Relying on their own gear alone is most common among Rest of Canada riders (67%), although market differences are not significant.

Approach	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	55%	67%	52%	50%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	43%	33%	45%	49%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	2%	0%	3%	1%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). T5 Which of the following best describes your approach to ORVing gear/vehicle and outfitter or rental operator use on overnight trips?

"Not sure" (0%) not shown.

APPROACH TO GEAR AND OUTFITTER USE – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Younger families are the most likely to combine their own gear with local outfitters or rental operators (50%), and older families the most likely to rely on their own gear alone (61%).

None of the traveller type differences are significant.

Approach	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
I have my own gear/vehicle and do not use local outfitters or rental operators for supplies or services	55%	48%	61%	51%	52%
I have my own gear/vehicle but also use local outfitters or rental operators for additional supplies or services	43%	50%	37%	48%	46%
I rely on outfitters, rental operators, or marinas for most knowledge, supplies, and services	2%	1%	1%	1%	2%

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

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

Base: all ORV riders (n=367). T5 Which of the following best describes your approach to ORVing gear/vehicle and outfitter or rental operator use on overnight trips?

"Not sure" (0%) not shown.

INDEPENDENT VS. GUIDED ORVING – MARKET

All ORV riders

More than half of ORV riders (57%) mainly ride on their own or with their own group, fully self-guided, while four in ten (40%) use a mix of guided and self-guided.

Going fully self-guided is most common among Rest of Canada riders (75%), although market differences are not significant.

Approach	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
I mainly go on my own or with my own group – fully self-guided	57%	75%	53%	53%
I use a mix of guided and self-guided	40%	23%	44%	45%
I mainly use guided or outfitted experiences provided by operators	2%	1%	3%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). T6 When you go on an ORVing trip, do you mainly go independently or use guided/outfitted experiences?

“Not sure” (0%) not shown.

INDEPENDENT VS. GUIDED ORVING – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Older friend groups are the most likely to go fully self-guided (65%), and younger families the most likely to use a mix of guided and self-guided (45%).

None of the traveller type differences are significant.

Approach	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
I mainly go on my own or with my own group – fully self-guided	57%	51%	60%	54%	65%
I use a mix of guided and self-guided	40%	45%	39%	44%	35%
I mainly use guided or outfitted experiences provided by operators	2%	3%	1%	1%	0%

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

Base: all ORV riders (n=367). T6 When you go on an ORVing trip, do you mainly go independently or use guided/outfitted experiences?

"Not sure" (0%) not shown.

PREFERRED ORV TERRAIN – MARKET

All ORV riders

Three-quarters of ORV riders (73%) prefer a mix of groomed or maintained trails and backcountry or technical terrain, while 13% each prefer mostly groomed trails or mostly backcountry terrain.

Rest of Canada riders are the most likely to prefer mostly backcountry or technical terrain (28%), although market differences are not significant.

Preferred terrain	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Mostly groomed/maintained trails	13%	19%	11%	10%
Mostly backcountry/technical terrain	13%	28%	10%	12%
A mix of both	73%	53%	78%	78%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). N9B Which of the following best describes your preferred ORV terrain? "Not sure" (1%) not shown.

PREFERRED ORV TERRAIN – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

A mix of both is the most common preference for every traveller type, from 64% among older families to 82% among older friend groups.

None of the traveller type differences are significant.

Preferred terrain	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Mostly groomed/maintained trails	13%	11%	16%	10%	11%
Mostly backcountry/technical terrain	13%	12%	18%	18%	6%
A mix of both	73%	77%	64%	72%	82%

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

Base: all ORV riders (n=367). N9B Which of the following best describes your preferred ORV terrain? "Not sure" (1%) not shown.



PLANNING & BOOKING

PLANNING LEAD TIME FOR ORVING TRIPS – MARKET

All ORV riders

Seven in ten ORV riders start planning 1 to 3 months (39%) or 3 to 6 months (33%) in advance, and about one in five (19%) plan 6 months or more ahead.

None of the market differences are significant.

Planning lead time	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Less than 1 month	8%	6%	9%	6%
1 to 3 months	39%	36%	38%	41%
3 to 6 months	33%	42%	32%	31%
6 to 12 months	17%	14%	18%	22%
More than 12 months in advance	2%	2%	3%	1%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). B1 How far in advance do you typically start planning an ORVing trip? "Not sure" (<1%) not shown.

PLANNING LEAD TIME FOR ORVING TRIPS – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Younger friend groups are the most likely to plan 1 to 3 months ahead (45%), and older friend groups 3 to 6 months ahead (41%).

None of the traveller type differences are significant.

Planning lead time	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Less than 1 month	8%	6%	12%	7%	8%
1 to 3 months	39%	41%	34%	45%	31%
3 to 6 months	33%	33%	32%	34%	41%
6 to 12 months	17%	15%	18%	13%	19%
More than 12 months in advance	2%	3%	4%	1%	0%

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

Base: all ORV riders (n=367). B1 How far in advance do you typically start planning an ORVing trip? "Not sure" (<1%) not shown.

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

All ORV riders

Word of mouth (54%), general internet search (48%) and social media content (46%) are the most common sources ORV riders use for inspiration and planning, followed by official tourism websites (35%).

U.S. Fly riders show the highest use of most sources, including online booking or review sites (47%) and AI tools (44%), although market differences are not significant.

Source	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Word of mouth (e.g., friends or family)	54%	59%	53%	56%
General internet search (e.g., Google, Bing)	48%	57%	43%	59%
Social media content (e.g., Instagram, Facebook, YouTube)	46%	47%	44%	55%
Official tourism websites (e.g., national, provincial, state, regional, city)	35%	38%	32%	44%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	31%	19%	32%	47%
Outfitter or lodge websites	27%	34%	24%	32%
AI tools (e.g., ChatGPT, Gemini, Copilot)	26%	17%	24%	44%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). B4 Which of the following do you use to find inspiration or plan your ORVing trips? Please select all that apply.

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

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

All ORV riders

About one in five to one in four ORV riders use each of the next group of sources, from specialized apps (18%) to articles, blogs or videos (25%) and forums or online communities (25%).

Use is again highest among U.S. Fly riders, including outdoor or sporting magazines (39%), although market differences are not significant.

Source	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Articles, blogs, or videos about travel destinations	25%	25%	22%	36%
Forums or online communities	25%	30%	23%	29%
TV shows or documentaries	24%	22%	26%	25%
Travel information centres or visitor centres	23%	10%	24%	34%
Outdoor or sporting magazines or publications	22%	12%	22%	39%
Magazines, travel guides or brochures	21%	21%	19%	34%
Social media influencers	20%	17%	22%	16%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	18%	16%	16%	33%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). B4 Which of the following do you use to find inspiration or plan your ORVing trips? Please select all that apply.

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

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

All ORV riders

Fewer than one in seven ORV riders use club newsletters (14%), consumer shows (10%), travel agents (9%), rally calendars (7%), email newsletters (7%) or travel phone lines (7%).

None of the market differences are significant.

Source	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Club or association newsletters or websites	14%	20%	13%	12%
Consumer shows/exhibitions	10%	17%	8%	13%
Travel agents	9%	9%	10%	8%
Rally or event calendars	7%	7%	7%	11%
Email newsletters	7%	7%	6%	15%
Travel-related phone lines or hotlines	7%	3%	7%	11%
Other	<1%	0%	1%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). B4 Which of the following do you use to find inspiration or plan your ORVing trips? Please select all that apply.

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

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

All ORV riders | Traveller types are defined on slide 10

Older friend groups are the most likely to use word of mouth (72%) and outfitter or lodge websites (39%).

Younger friend groups are the least likely to use word of mouth (43%) and general internet search (37%). None of the traveller type differences are significant.

Source	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Word of mouth (e.g., friends or family)	54%	48%	58%	43%	72%
General internet search (e.g., Google, Bing)	48%	49%	50%	37%	53%
Social media content (e.g., Instagram, Facebook, YouTube)	46%	52%	45%	46%	40%
Official tourism websites (e.g., national, provincial, state, regional, city)	35%	33%	48%	28%	33%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	31%	38%	29%	24%	31%
Outfitter or lodge websites	27%	26%	24%	15%	39%
AI tools (e.g., ChatGPT, Gemini, Copilot)	26%	33%	21%	21%	26%

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

Base: all ORV riders (n=367). B4 Which of the following do you use to find inspiration or plan your ORVing trips? Please select all that apply.

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

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

All ORV riders | Traveller types are defined on slide 10

Younger families are the most likely to use articles, blogs or videos (36%), forums (31%) and visitor centres (29%).

None of the traveller type differences are significant.

Source	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Articles, blogs, or videos about travel destinations	25%	36%	17%	21%	25%
Forums or online communities	25%	31%	24%	27%	20%
TV shows or documentaries	24%	28%	24%	20%	26%
Travel information centres or visitor centres	23%	29%	21%	16%	20%
Outdoor or sporting magazines or publications	22%	23%	22%	18%	30%
Magazines, travel guides or brochures	21%	25%	19%	21%	19%
Social media influencers	20%	25%	16%	23%	16%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	18%	23%	17%	16%	15%

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

Base: all ORV riders (n=367). B4 Which of the following do you use to find inspiration or plan your ORVing trips? Please select all that apply.

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

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

All ORV riders | Traveller types are defined on slide 10

Use of each source on this slide is 20% or lower for every traveller type.

None of the traveller type differences are significant.

Source	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Club or association newsletters or websites	14%	18%	20%	9%	6%
Consumer shows/exhibitions	10%	11%	19%	7%	4%
Travel agents	9%	12%	9%	12%	2%
Rally or event calendars	7%	11%	3%	7%	6%
Email newsletters	7%	10%	6%	9%	3%
Travel-related phone lines or hotlines	7%	11%	7%	5%	4%
Other	<1%	0%	2%	0%	0%

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

Base: all ORV riders (n=367). B4 Which of the following do you use to find inspiration or plan your ORVing trips? Please select all that apply.

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

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – MARKET

ORV riders who use social media to plan

Facebook and YouTube (81% each) are the most used social media platforms for ORVing information, followed by Instagram (65%) and TikTok (47%).

Instagram use is highest among U.S. Fly riders (88%). Several market bases are small, and none of the market differences are significant.

Platform	Overall (n=200)	Rest of Canada (n=31)	U.S. Drive (n=122)	U.S. Fly (n=33)
Facebook	81%	94%	80%	80%
YouTube	81%	69%	85%	76%
Instagram	65%	68%	60%	88%
TikTok	47%	29%	51%	53%
Reddit	36%	26%	34%	49%
X (formerly known as Twitter)	31%	13%	32%	43%
Pinterest	23%	21%	24%	20%
WhatsApp	22%	8%	24%	23%
Snapchat	22%	8%	27%	20%
Threads	9%	8%	9%	12%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who use social media to plan (B4) (n=200). B4B Which social media platforms do you use to obtain information about your ORVing trips? Please select all that apply.

“Not sure” (0%) not shown.

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to use Snapchat (36%).

Older friend groups are the least likely to use Instagram (47%) and TikTok (25%).

Platform	Overall (n=200)	Younger Families (n=75)	Older Families (n=42)	Younger Friends (n=31)	Older Friends (n=36)
Facebook	81%	84%	81%	79%	84%
YouTube	81%	82%	89%	72%	84%
Instagram	65%	69%	71%	76%	47%
TikTok	47%	57%	50%	46%	25%
Reddit	36%	49%	24%	25%	39%
X (formerly known as Twitter)	31%	42%	23%	25%	23%
Pinterest	23%	29%	27%	24%	14%
WhatsApp	22%	28%	21%	21%	12%
Snapchat	22%	36% ▲	18%	14%	0%
Threads	9%	15%	0%	5%	11%

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

Base: ORV riders who use social media to plan (B4) (n=200). B4B Which social media platforms do you use to obtain information about your ORVing trips? Please select all that apply.

"Not sure" (0%) not shown.

HOW ORVING TRIPS ARE BOOKED – MARKET

All ORV riders

Booking directly with accommodation providers (59%) is the most common way ORV riders book trips, followed by online booking platforms (44%) and booking informally through friends or personal contacts (36%).

Booking directly with accommodation providers is most common among Rest of Canada and U.S. Fly riders (70% each). None of the market differences are significant.

Booking method	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Directly with accommodation providers (lodge, hotel, cottage)	59%	70%	55%	70%
Through an online booking platform (e.g., Booking.com, Expedia)	44%	33%	47%	54%
Informally through friends or personal contacts	36%	44%	31%	37%
Directly with outfitters or guides	30%	28%	31%	33%
Through a travel agent or tour operator	17%	9%	18%	21%
Through a sporting or outdoor club or association	14%	4%	15%	16%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). B2 How do you typically book your ORVing trips? Please select all that apply. "Not sure" (<1%) not shown.

HOW ORVING TRIPS ARE BOOKED – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to book through a travel agent or tour operator (27%).

Younger families are also the most likely to book through an online booking platform (51%) or a sporting or outdoor club or association (20%).

Booking method	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Directly with accommodation providers (lodge, hotel, cottage)	59%	61%	62%	47%	66%
Through an online booking platform (e.g., Booking.com, Expedia)	44%	51%	36%	49%	38%
Informally through friends or personal contacts	36%	39%	30%	41%	36%
Directly with outfitters or guides	30%	35%	29%	32%	27%
Through a travel agent or tour operator	17%	27% ▲	9%	16%	6%
Through a sporting or outdoor club or association	14%	20%	14%	12%	4%

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

Base: all ORV riders (n=367). B2 How do you typically book your ORVing trips? Please select all that apply. "Not sure" (<1%) not shown.

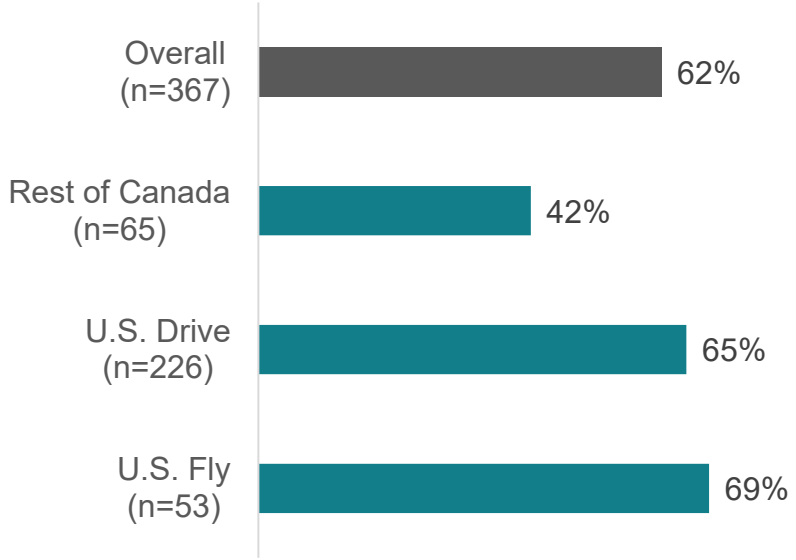
IMPORTANCE OF WORKING WITH LOCAL OPERATORS

All ORV riders | Traveller types are defined on slide 10

Six in ten ORV riders (62%) say working with a local outfitter, guide, rental operator, marina or accommodation provider is important when planning a trip.

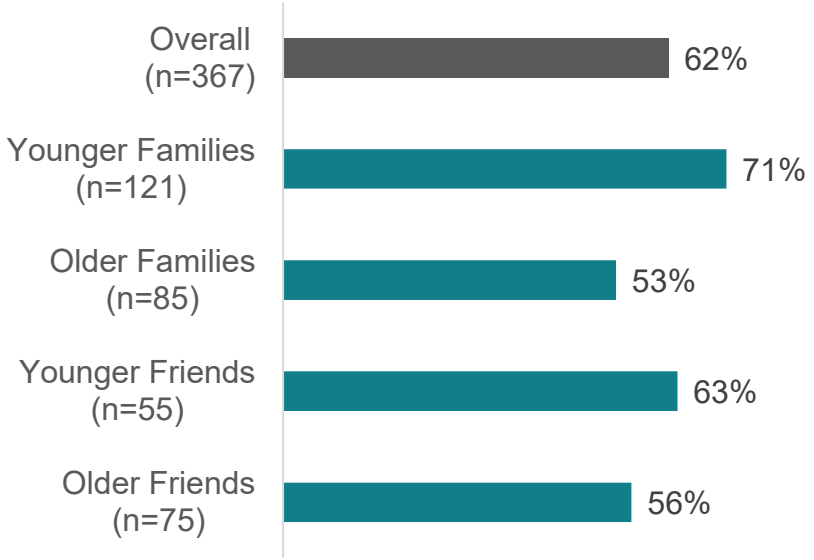
Importance ranges from 42% among Rest of Canada riders to 69% among U.S. Fly riders, and from 53% among older families to 71% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders, excluding “Don’t know” (n=367). B3 (TOP2) When planning an ORVing trip, how important is working with a local outfitter, guide, rental operator, marina, or accommodation provider? TOP2 = % somewhat or very important.
“Local operators” in this question include accommodation providers and marinas as well as outfitters, guides and rental operators.

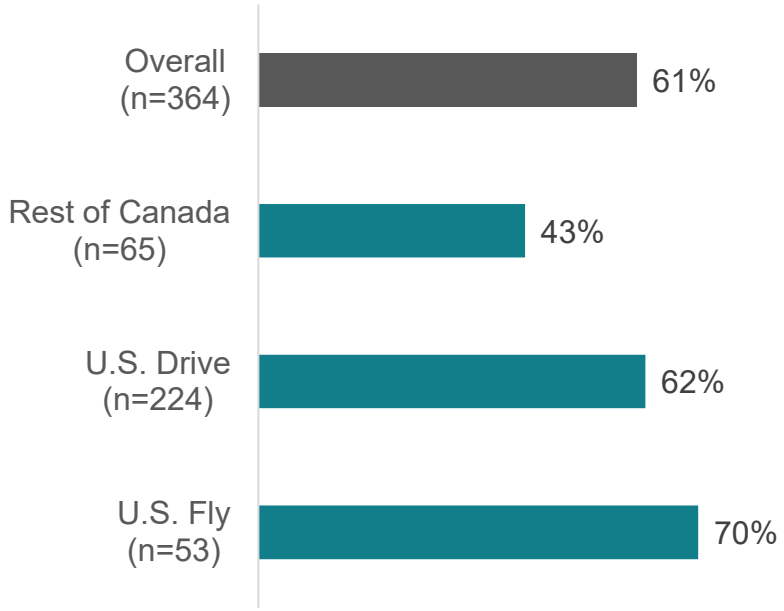
LIKELIHOOD OF USING AI TOOLS TO PLAN

All ORV riders | Traveller types are defined on slide 10

Six in ten ORV riders (61%) are likely to use AI tools to help plan their next ORVing trip.

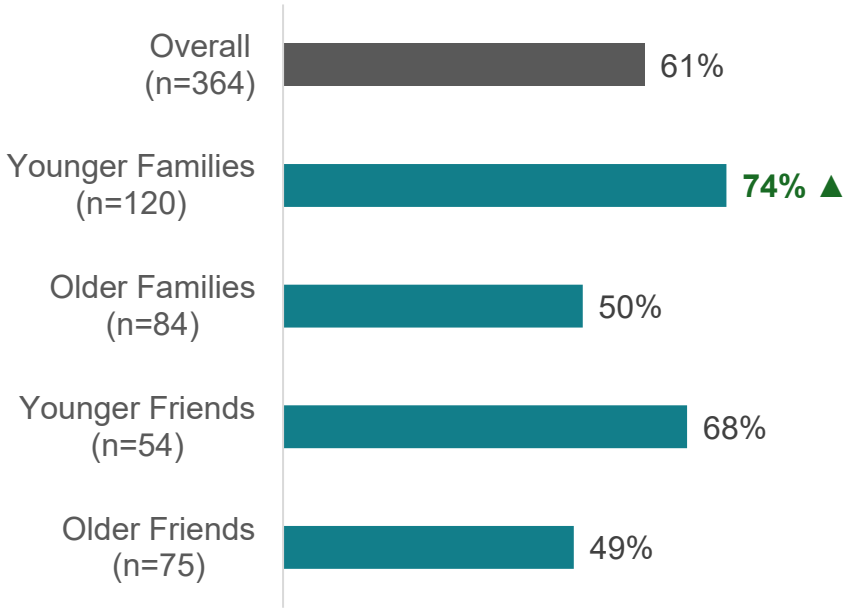
Younger families are more likely than other traveller types to use AI tools (74%). Likelihood is lowest among Rest of Canada riders (43%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders, excluding “Don’t know” (n=364). B5 (TOP2) How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next ORVing trip? TOP2 = % somewhat or very likely.

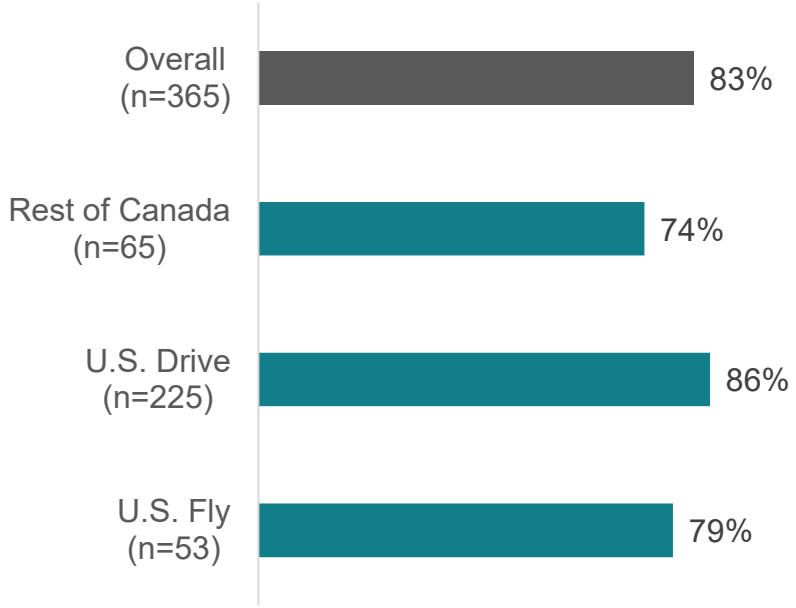
IMPORTANCE OF CERTIFICATION OR DESIGNATION

All ORV riders | Traveller types are defined on slide 10

More than eight in ten ORV riders (83%) say it is important that accommodations, operators or destinations hold a recognized certification or designation.

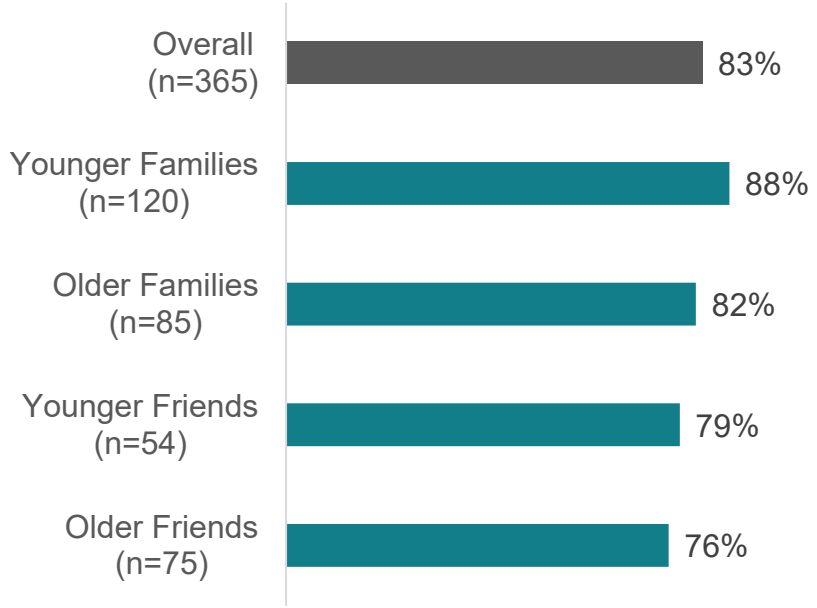
Importance ranges from 74% among Rest of Canada riders to 86% among U.S. Drive riders, and from 76% among older friend groups to 88% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders, excluding “Don’t know” (n=365). B6 (TOP2) How important is it that accommodations, operators, or destinations hold a recognized certification or designation (e.g., motorcycle-friendly, snowmobile-friendly, ORV-friendly)? TOP2 = % somewhat or very important.

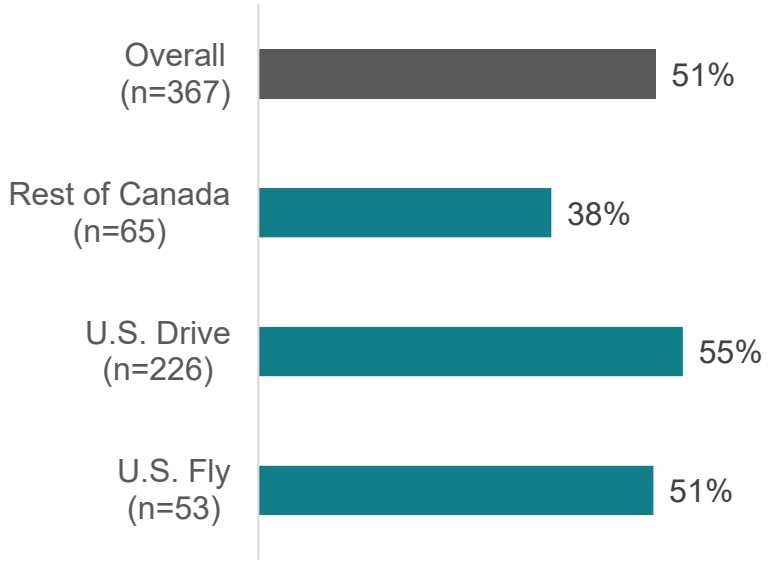
USE OF CERTIFIED ROUTES, TRAIL PASSES OR PASSPORT PROGRAMS

All ORV riders | Traveller types are defined on slide 10

Half of ORV riders (51%) have used an established or certified touring route, trail pass network or rewards/passport program when planning an ORVing trip.

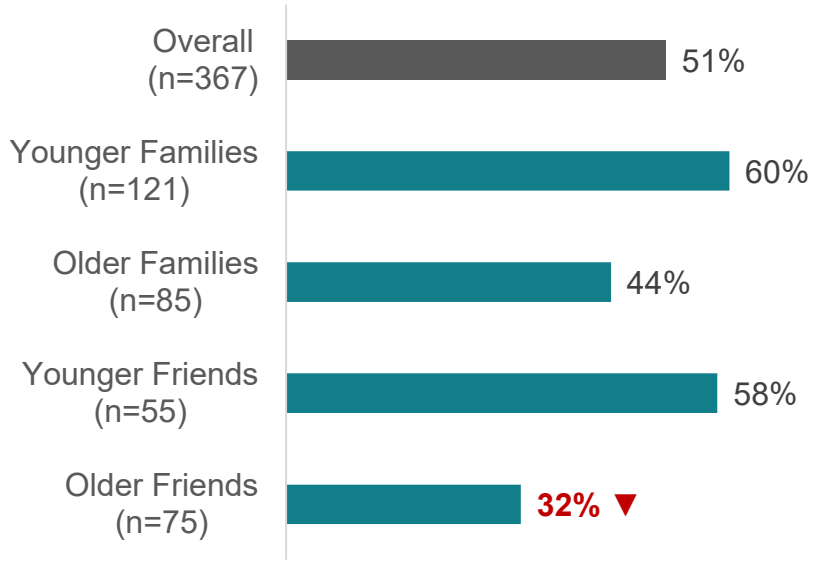
Use ranges from 38% among Rest of Canada riders to 55% among U.S. Drive riders. Older friend groups are less likely than other traveller types to have used one (32%).

MARKET



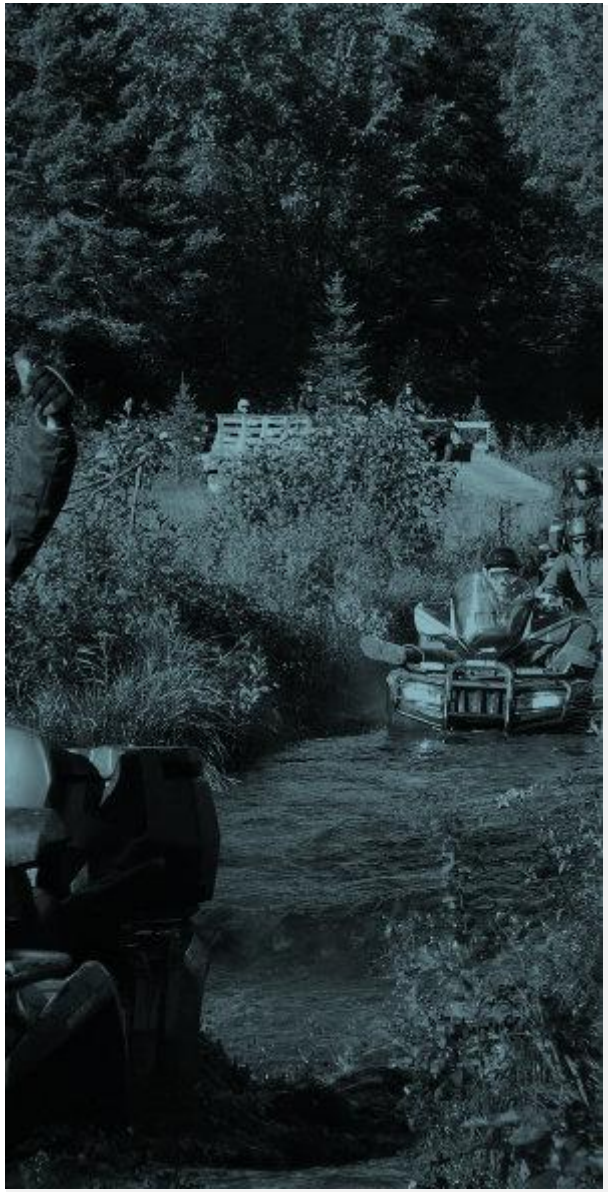
▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders (n=367). 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 an ORVing trip? % Yes shown; "No" (41%) and "Not sure" (8%) not shown.
The OFSC example in this question was shared across all five activities and is not specific to ORV riding.



MOTIVATION & VALUES

MOTIVATIONS FOR ORVING – MARKET (1 OF 2)

All ORV riders

Connection with nature (62%), escape from everyday stress (62%) and bonding with friends or family (61%) are the top motivations for ORVing trips, closely followed by new places (59%), exploring trails (55%) and thrill or adventure (55%).

Connection with nature is highest among U.S. Fly riders (75%). None of the market differences are significant.

Motivation	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Connection with nature and the outdoors	62%	69%	58%	75%
Escape from everyday stress and routine	62%	66%	61%	60%
Bonding with friends or family	61%	58%	61%	63%
Experiencing new places and landscapes	59%	65%	57%	65%
Exploring open roads, trails, or waterways	55%	42%	58%	63%
Thrill, challenge, or sense of adventure	55%	58%	53%	64%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). M1 What are your primary motivations for taking ORVing trips? Please select all that apply.

"Not sure" (0%) not shown.

MOTIVATIONS FOR ORVING – MARKET (2 OF 2)

All ORV riders

Half of ORV riders (47%) are motivated by wildlife encounters, and a third by solitude (33%) or camaraderie with other ORVing enthusiasts (30%).

U.S. Drive riders are less likely than other markets to be motivated by physical fitness and health (17%).

Motivation	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Wildlife encounters and natural discovery	47%	55%	43%	55%
Solitude and personal reflection	33%	33%	31%	43%
Camaraderie or connection with other ORVing enthusiasts	30%	18%	32%	35%
Physical fitness and health	24%	36%	17% ▼	37%
Tradition or cultural heritage related to the activity	18%	9%	21%	19%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). M1 What are your primary motivations for taking ORVing trips? Please select all that apply.

"Not sure" (0%) not shown.

MOTIVATIONS FOR ORVING – TRAVELLER TYPE (1 OF 2)

All ORV riders | Traveller types are defined on slide 10

Older friend groups are the most likely to be motivated by experiencing new places (72%), bonding with friends or family (71%) and thrill or adventure (69%).

None of the traveller type differences are significant.

Motivation	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Connection with nature and the outdoors	62%	58%	65%	61%	74%
Escape from everyday stress and routine	62%	60%	71%	55%	65%
Bonding with friends or family	61%	61%	69%	50%	71%
Experiencing new places and landscapes	59%	56%	58%	59%	72%
Exploring open roads, trails, or waterways	55%	58%	46%	52%	64%
Thrill, challenge, or sense of adventure	55%	57%	51%	53%	69%

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

Base: all ORV riders (n=367). M1 What are your primary motivations for taking ORVing trips? Please select all that apply.

"Not sure" (0%) not shown.

MOTIVATIONS FOR ORVING – TRAVELLER TYPE (2 OF 2)

All ORV riders | Traveller types are defined on slide 10

Older friend groups are the most likely to be motivated by solitude (45%), and younger families and older friend groups by camaraderie (36% each).

None of the traveller type differences are significant.

Motivation	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Wildlife encounters and natural discovery	47%	46%	45%	48%	51%
Solitude and personal reflection	33%	35%	30%	28%	45%
Camaraderie or connection with other ORVing enthusiasts	30%	36%	30%	23%	36%
Physical fitness and health	24%	30%	21%	27%	18%
Tradition or cultural heritage related to the activity	18%	24%	13%	17%	17%

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

Base: all ORV riders (n=367). M1 What are your primary motivations for taking ORVing trips? Please select all that apply.

"Not sure" (0%) not shown.

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

All ORV riders

Scenic driving (52%) and Northern Lights viewing (52%) are the additional experiences most likely to enhance an ORVing trip, followed by wildlife viewing (42%), all-inclusive packages (37%) and culinary experiences (36%).

Interest in most of these experiences is highest among U.S. Fly riders. None of the market differences are significant.

Additional experience	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Scenic driving or road trip components	52%	60%	49%	51%
Northern Lights or dark sky viewing experiences	52%	42%	54%	54%
Wildlife viewing separate from ORVing	42%	28%	44%	49%
All-inclusive lodge or touring packages	37%	32%	37%	46%
Culinary experiences featuring locally sourced or freshly caught / harvested food	36%	27%	36%	47%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	31%	27%	29%	39%
Photography or nature interpretation guided experiences	30%	27%	32%	27%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). M2 Beyond ORVing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

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

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

All ORV riders

About a quarter of ORV riders are interested in multi-stop itineraries (29%), Indigenous-led experiences (27%) or wellness experiences (24%). Only 3% would prefer to focus entirely on ORVing.

None of the market differences are significant.

Additional experience	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Multi-stop regional itineraries combining several Northern Ontario areas	29%	23%	30%	31%
Indigenous-led cultural or land-based experiences	27%	25%	26%	37%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	24%	29%	21%	28%
Youth or family-oriented introduction-to-ORVing programs	20%	14%	21%	24%
ORVing rallies, races, or club events	20%	9%	22%	20%
Learning and interpretation opportunities	19%	20%	18%	16%
None – I prefer to focus entirely on ORVing	3%	1%	3%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). M2 Beyond ORVing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

“Not sure” (<1%) not shown.

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

All ORV riders | Traveller types are defined on slide 10

Older friend groups show the highest interest in scenic driving (68%), Northern Lights viewing (65%) and culinary experiences (56%).

None of the traveller type differences are significant.

Additional experience	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Scenic driving or road trip components	52%	43%	65%	39%	68%
Northern Lights or dark sky viewing experiences	52%	51%	49%	39%	65%
Wildlife viewing separate from ORVing	42%	42%	36%	46%	48%
All-inclusive lodge or touring packages	37%	48%	33%	33%	34%
Culinary experiences featuring locally sourced or freshly caught / harvested food	36%	39%	25%	24%	56%
Multi-activity packages (e.g., snowmobiling + ice fishing, boating + fishing)	31%	36%	23%	40%	25%
Photography or nature interpretation guided experiences	30%	33%	33%	26%	25%

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

Base: all ORV riders (n=367). M2 Beyond ORVing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

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

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

All ORV riders | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in youth or family-oriented introduction-to-ORVing programs (35%).

Older families show the highest interest in multi-stop itineraries (40%), and younger friend groups in ORVing rallies, races or club events (30%).

Additional experience	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Multi-stop regional itineraries combining several Northern Ontario areas	29%	24%	40%	21%	32%
Indigenous-led cultural or land-based experiences	27%	25%	33%	21%	31%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	24%	34%	17%	23%	16%
Youth or family-oriented introduction-to-ORVing programs	20%	35% ▲	23%	12%	6%
ORVing rallies, races, or club events	20%	27%	9%	30%	17%
Learning and interpretation opportunities	19%	28%	15%	22%	10%
None – I prefer to focus entirely on ORVing	3%	<1%	7%	3%	3%

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

Base: all ORV riders (n=367). M2 Beyond ORVing itself, which of the following additional experiences would enhance your trip? Please select all that apply.

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

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

ORV riders who provided a response

When asked what makes an ORVing trip successful, almost half of ORV riders (46%) mention fun and enjoyment, followed by scenery and nature (24%), time with family and friends (24%) and safety (22%).

Rest of Canada riders are the most likely to mention scenery and nature (36%) and new experiences (22%). None of the market differences are significant.

Theme	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Fun / enjoyment / a good time	46%	38%	48%	48%
Scenery / nature / wildlife	24%	36%	19%	26%
Time with family, friends or loved ones	24%	11%	27%	20%
Safety / no accidents / getting home safely	22%	14%	26%	20%
Everyone in the group enjoys it	15%	6%	16%	24%
Good trails / snow conditions	13%	12%	12%	16%
New experiences / exploring / learning	11%	22%	9%	11%
Good roads / routes / open road	9%	8%	9%	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who provided a response (n=367). M3 In your own words, what makes an ORVing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

“Don’t know / not sure” (0%) not shown.

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

ORV riders who provided a response

Fewer than one in ten ORV riders mention each of the themes on this slide.

Rest of Canada riders are the most likely to mention adventure and excitement (20%). None of the market differences are significant.

Theme	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Bonding / making memories	8%	8%	9%	3%
Good planning / preparation / reliable equipment	8%	8%	8%	10%
Relaxation / peace / stress-free	7%	4%	8%	6%
Adventure / excitement / thrill	7%	20%	5%	5%
No problems / things go smoothly	7%	3%	6%	11%
Good weather	6%	1%	6%	8%
Escape / getting away / unplugging / freedom	5%	1%	4%	7%
Good food and drink	3%	3%	3%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who provided a response (n=367). M3 In your own words, what makes an ORVing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

“Don’t know / not sure” (0%) not shown.

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

ORV riders who provided a response

Each remaining theme is mentioned by 3% of ORV riders or fewer, and 5% give a general positive response.

Theme	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Coming home happy / satisfied / wanting to return	3%	0%	4%	2%
Good accommodation / campsites / amenities	2%	1%	2%	5%
Local culture / meeting people	1%	0%	2%	1%
Fishing / catching fish	1%	4%	<1%	1%
Affordable / good value / on budget	1%	0%	<1%	2%
Calm water / good boating conditions	<1%	1%	0%	0%
General positive / vague	5%	4%	5%	10%
Other	3%	2%	3%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who provided a response (n=367). M3 In your own words, what makes an ORVing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (0%) not shown.

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

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

Older friend groups are the most likely to mention fun and enjoyment (63%) and safety (32%).

None of the traveller type differences are significant.

Theme	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Fun / enjoyment / a good time	46%	43%	42%	38%	63%
Scenery / nature / wildlife	24%	20%	27%	22%	30%
Time with family, friends or loved ones	24%	29%	24%	26%	23%
Safety / no accidents / getting home safely	22%	21%	15%	30%	32%
Everyone in the group enjoys it	15%	22%	16%	15%	9%
Good trails / snow conditions	13%	12%	12%	16%	15%
New experiences / exploring / learning	11%	7%	15%	10%	15%
Good roads / routes / open road	9%	10%	5%	6%	11%

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

Base: ORV riders who provided a response (n=367). M3 In your own words, what makes an ORVing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (0%) not shown.

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

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

Mentions of each theme on this slide are 15% or lower for every traveller type.

None of the traveller type differences are significant.

Theme	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Bonding / making memories	8%	8%	11%	10%	5%
Good planning / preparation / reliable equipment	8%	6%	6%	15%	7%
Relaxation / peace / stress-free	7%	6%	5%	12%	11%
Adventure / excitement / thrill	7%	3%	12%	11%	9%
No problems / things go smoothly	7%	5%	8%	5%	7%
Good weather	6%	5%	5%	9%	0%
Escape / getting away / unplugging / freedom	5%	5%	4%	1%	8%
Good food and drink	3%	1%	5%	1%	6%

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

Base: ORV riders who provided a response (n=367). M3 In your own words, what makes an ORVing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

“Don’t know / not sure” (0%) not shown.

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

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

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

Theme	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Coming home happy / satisfied / wanting to return	3%	1%	3%	6%	3%
Good accommodation / campsites / amenities	2%	3%	3%	1%	1%
Local culture / meeting people	1%	<1%	1%	0%	4%
Fishing / catching fish	1%	<1%	0%	0%	3%
Affordable / good value / on budget	1%	1%	3%	1%	0%
Calm water / good boating conditions	<1%	1%	0%	1%	0%
General positive / vague	5%	5%	10%	2%	0%
Other	3%	4%	1%	5%	0%

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

Base: ORV riders who provided a response (n=367). M3 In your own words, what makes an ORVing trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure" (0%) not shown.

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

ORV riders who provided a response

ORV riders see Northern Ontario's wilderness (34%) and scenery (30%) as its greatest advantages for ORVing, followed by its trails and terrain for riding (16%).

Rest of Canada riders are the most likely to mention being close to home (20%) and good roads and scenic routes (19%). None of the market differences are significant.

Advantage	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Wilderness / untouched / pristine nature	34%	39%	32%	30%
Scenery / natural beauty / landscapes	30%	34%	32%	21%
Trails / snow / terrain for riding	16%	21%	15%	14%
Uncrowded / quiet / remote / solitude	11%	10%	11%	12%
Vast / open space / room to explore	11%	8%	11%	14%
Close to home / easy to get to	8%	20%	4%	6%
Good roads / scenic routes and drives	8%	19%	5%	4%
Variety of things to do / places to explore	7%	5%	7%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who provided a response (n=367). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for ORVing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (6%) not shown.

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

ORV riders who provided a response

Each of the advantages on this slide is mentioned by 6% of ORV riders or fewer.

Lakes and rivers (12%) and forests (11%) are mentioned most by Rest of Canada riders. None of the market differences are significant.

Advantage	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Unique / different / new to me / in Canada	6%	1%	8%	6%
Wildlife	6%	6%	5%	10%
Forests / trees / fall colours	5%	11%	2%	8%
Lakes / rivers / water	5%	12%	2%	8%
Northern lights / dark skies / stars	4%	0%	5%	5%
Friendly / welcoming people / hospitality	3%	3%	4%	2%
Culture / history / Indigenous heritage	2%	3%	3%	0%
Escape from the city / everyday life	2%	1%	2%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who provided a response (n=367). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for ORVing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (6%) not shown.

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

ORV riders who provided a response

Each remaining advantage is mentioned by 2% of ORV riders or fewer, and 6% give a general positive response.

Advantage	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Climate / cooler weather / seasons	2%	0%	2%	3%
Safe destination	1%	4%	1%	1%
Affordable / good value	1%	0%	1%	3%
Clean environment / fresh air	1%	0%	1%	1%
Fishing	0%	0%	0%	0%
General positive / vague	6%	0%	8%	6%
Other	6%	9%	5%	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who provided a response (n=367). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for ORVing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (6%) not shown.

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

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

Wilderness and scenery are the top advantages for every traveller type.

Older friend groups are the least likely to mention trails and terrain for riding (5%). None of the traveller type differences are significant.

Advantage	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Wilderness / untouched / pristine nature	34%	36%	35%	27%	35%
Scenery / natural beauty / landscapes	30%	31%	27%	32%	33%
Trails / snow / terrain for riding	16%	19%	21%	22%	5%
Uncrowded / quiet / remote / solitude	11%	14%	6%	11%	10%
Vast / open space / room to explore	11%	13%	7%	17%	6%
Close to home / easy to get to	8%	5%	16%	8%	6%
Good roads / scenic routes and drives	8%	7%	8%	8%	5%
Variety of things to do / places to explore	7%	7%	4%	6%	9%

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

Base: ORV riders who provided a response (n=367). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for ORVing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (6%) not shown.

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

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

Younger friend groups are the most likely to describe Northern Ontario as unique or new to them (16%).

None of the traveller type differences are significant.

Advantage	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Unique / different / new to me / in Canada	6%	6%	6%	16%	4%
Wildlife	6%	7%	5%	3%	9%
Forests / trees / fall colours	5%	3%	8%	5%	5%
Lakes / rivers / water	5%	8%	0%	1%	7%
Northern lights / dark skies / stars	4%	5%	4%	4%	2%
Friendly / welcoming people / hospitality	3%	5%	2%	3%	0%
Culture / history / Indigenous heritage	2%	1%	2%	2%	6%
Escape from the city / everyday life	2%	1%	2%	3%	3%

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

Base: ORV riders who provided a response (n=367). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for ORVing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (6%) not shown.

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

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

Each remaining advantage is mentioned by 9% or fewer in every traveller type.

Advantage	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Climate / cooler weather / seasons	2%	2%	2%	3%	0%
Safe destination	1%	4%	0%	1%	0%
Affordable / good value	1%	1%	1%	0%	2%
Clean environment / fresh air	1%	1%	1%	1%	0%
Fishing	0%	0%	0%	0%	0%
General positive / vague	6%	9%	2%	5%	5%
Other	6%	7%	5%	4%	7%

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

Base: ORV riders who provided a response (n=367). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for ORVing trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

"Don't know / not sure / never been / no advantage" (6%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (1 OF 2)

ORV riders who provided a response

ORV riders most often describe sustainable tourism as protecting or preserving the environment and nature (31%), followed by tourism that lasts (17%), minimal impact (13%) and leave no trace (13%).

Leave no trace is mentioned most by Rest of Canada and U.S. Fly riders (22% each). None of the market differences are significant.

Meaning	Overall (n=365)	Rest of Canada (n=65)	U.S. Drive (n=225)	U.S. Fly (n=52)
Protecting / preserving the environment and nature	31%	37%	30%	31%
Tourism that lasts / keeps visitors coming back	17%	11%	23%	5%
Minimal impact / not harming or damaging	13%	18%	12%	13%
Leave no trace / leave it as you found it / no litter	13%	22%	9%	22%
Good visitor experience (easy, enjoyable, lots to offer)	10%	3%	11%	9%
Benefiting / respecting local communities	7%	5%	6%	9%
Supporting the local economy / businesses	7%	3%	9%	5%
For future generations / so others can enjoy it later	6%	6%	7%	5%
Respectful / responsible / mindful travel	6%	7%	6%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who provided a response (n=365). V0 In your own words, what does sustainable tourism mean?
Coded open-ended responses; more than one theme could be coded per response.
"Don't know / not sure" (6%) not shown.

MEANING OF SUSTAINABLE TOURISM – MARKET (2 OF 2)

ORV riders who provided a response

Each remaining theme is mentioned by 6% of ORV riders or fewer, and 6% give a general positive response.

None of the market differences are significant.

Meaning	Overall (n=365)	Rest of Canada (n=65)	U.S. Drive (n=225)	U.S. Fly (n=52)
Eco-friendly / green / recycling / less waste	6%	5%	7%	5%
Responsible use of natural resources	5%	5%	4%	3%
Protecting wildlife and habitats	3%	8%	2%	0%
Lower emissions / fuel / energy use	2%	4%	2%	3%
Respecting local culture / heritage	2%	0%	3%	2%
Travelling / exploring / touring (term read literally)	2%	1%	2%	1%
Affordable / budget travel	1%	0%	2%	0%
Balancing visitors, environment and community	1%	0%	1%	1%
General positive / vague	6%	4%	6%	8%
Other	9%	5%	11%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who provided a response (n=365). V0 In your own words, what does sustainable tourism mean?
Coded open-ended responses; more than one theme could be coded per response.
“Don’t know / not sure” (6%) not shown.

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

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

Protecting the environment is the most common description for every traveller type, from 22% among older families to 34% among younger families and younger friend groups.

None of the traveller type differences are significant.

Meaning	Overall (n=365)	Younger Families (n=119)	Older Families (n=85)	Younger Friends (n=54)	Older Friends (n=75)
Protecting / preserving the environment and nature	31%	34%	22%	34%	28%
Tourism that lasts / keeps visitors coming back	17%	18%	17%	16%	16%
Minimal impact / not harming or damaging	13%	13%	7%	13%	18%
Leave no trace / leave it as you found it / no litter	13%	11%	14%	7%	20%
Good visitor experience (easy, enjoyable, lots to offer)	10%	9%	7%	10%	11%
Benefiting / respecting local communities	7%	10%	6%	8%	4%
Supporting the local economy / businesses	7%	10%	6%	7%	2%
For future generations / so others can enjoy it later	6%	9%	0%	10%	6%
Respectful / responsible / mindful travel	6%	8%	6%	10%	3%

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

Base: ORV riders who provided a response (n=365). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

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

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

Each remaining theme is mentioned by 9% or fewer in every traveller type, apart from general positive and other responses.

Meaning	Overall (n=365)	Younger Families (n=119)	Older Families (n=85)	Younger Friends (n=54)	Older Friends (n=75)
Eco-friendly / green / recycling / less waste	6%	8%	3%	4%	8%
Responsible use of natural resources	5%	5%	4%	4%	1%
Protecting wildlife and habitats	3%	6%	2%	0%	2%
Lower emissions / fuel / energy use	2%	2%	0%	9%	2%
Respecting local culture / heritage	2%	2%	3%	4%	2%
Travelling / exploring / touring (term read literally)	2%	2%	3%	1%	0%
Affordable / budget travel	1%	2%	0%	2%	2%
Balancing visitors, environment and community	1%	0%	1%	0%	2%
General positive / vague	6%	4%	11%	4%	3%
Other	9%	12%	11%	10%	5%

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

Base: ORV riders who provided a response (n=365). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – MARKET

All ORV riders

Nine in ten ORV riders (90%) say supporting local, independently owned businesses is important when choosing a destination, and more than eight in ten say the same of conservation (86%), minimal environmental impact (85%) and community benefit (84%).

Accessibility for people with mobility or physical needs is rated lowest by Rest of Canada riders (55%). None of the market differences are significant.

Consideration	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Supporting local, independently owned businesses	90%	91%	90%	96%
Conservation and responsible resource management	86%	84%	86%	88%
Minimal environmental impact of tourism in the area	85%	89%	82%	90%
Community benefit – tourism dollars staying in the local community	84%	85%	83%	90%
Learning about Indigenous culture and history	73%	71%	74%	69%
Accessibility for people with mobility or physical needs	68%	55%	73%	65%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders, excluding “Don’t know”; bases vary by item (n=361 to 367). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

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

Older friend groups place the least importance on learning about Indigenous culture and history (66%) and accessibility (55%).

Consideration	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Supporting local, independently owned businesses	90%	92%	90%	88%	92%
Conservation and responsible resource management	86%	87%	83%	84%	90%
Minimal environmental impact of tourism in the area	85%	87%	83%	83%	87%
Community benefit – tourism dollars staying in the local community	84%	85%	85%	79%	81%
Learning about Indigenous culture and history	73%	77%	72%	75%	66%
Accessibility for people with mobility or physical needs	68%	71%	71%	68%	55%

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

Base: all ORV riders, excluding “Don’t know”; bases vary by item (n=361 to 367). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET

All ORV riders

Nine in ten ORV riders (88%) feel a personal responsibility to protect the natural environments they visit, and about two-thirds would pay more for a trip with a clear conservation benefit (68%), look for certified operators (65%) or seek out eco-friendly options (64%).

Rest of Canada riders are less likely than other markets to say they would pay more for a clear conservation benefit (44%).

Statement	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
I feel a personal responsibility to protect natural environments I visit	88%	86%	87%	97%
I am interested in contributing to wildlife conservation when I travel	82%	79%	83%	85%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	79%	77%	80%	76%
I would be interested in an Indigenous-led guided experience	69%	59%	72%	68%
I would pay more for a trip that had a clear conservation benefit	68%	44% ▼	72%	78%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	65%	57%	67%	67%
I actively seek out eco-friendly or sustainable travel options	64%	50%	65%	72%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders, excluding “Don’t know”; bases vary by item (n=363 to 367). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

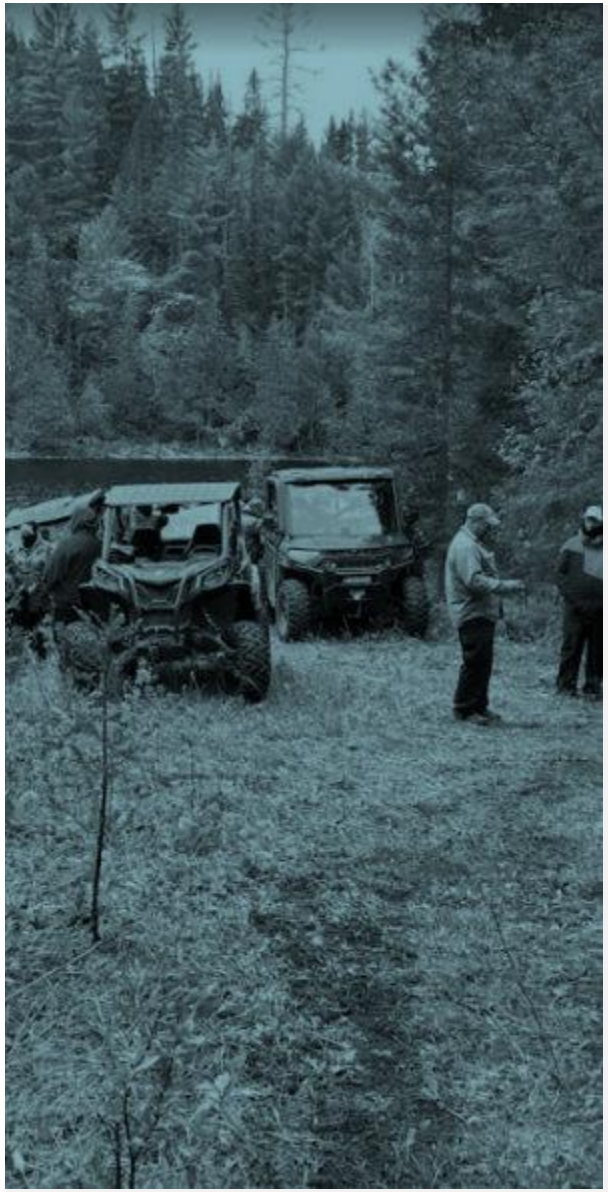
Younger families are more likely than other traveller types to actively seek out eco-friendly or sustainable travel options (74%).

Older friend groups are the least likely to look for certified operators (52%) or seek out eco-friendly options (50%).

Statement	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
I feel a personal responsibility to protect natural environments I visit	88%	86%	90%	86%	91%
I am interested in contributing to wildlife conservation when I travel	82%	82%	86%	81%	80%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	79%	80%	87%	72%	78%
I would be interested in an Indigenous-led guided experience	69%	75%	73%	73%	59%
I would pay more for a trip that had a clear conservation benefit	68%	76%	60%	70%	62%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	65%	69%	63%	73%	52%
I actively seek out eco-friendly or sustainable travel options	64%	74% ▲	56%	73%	50%

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

Base: all ORV riders, excluding “Don’t know”; bases vary by item (n=363 to 367). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.



AWARENESS & PERCEPTION

AWARENESS OF NORTHERN ONTARIO – MARKET

ORV riders who do not live in Northern Ontario

Eight in ten ORV riders know a lot (35%) or a little (46%) about Northern Ontario, while 18% have heard of it but know nothing about it.

Rest of Canada riders are more likely than other markets to know a little about Northern Ontario (67%).

Awareness	Overall (n=365)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
I have heard of and know a lot about it	35%	19%	37%	42%
I have heard of and know a little bit about it	46%	67% ▲	41%	44%
I have heard of but know nothing about it	18%	14%	20%	14%
I have never heard of before	1%	0%	2%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who do not live in Northern Ontario (n=365). N0 How would you best describe your awareness of Northern Ontario?

AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to know a lot about Northern Ontario (46%), while older friend groups are less likely (17%).

Older friend groups are the most likely to have heard of it but know nothing about it (24%).

Awareness	Overall (n=365)	Younger Families (n=120)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
I have heard of and know a lot about it	35%	46% ▲	34%	32%	17% ▼
I have heard of and know a little bit about it	46%	41%	47%	48%	59%
I have heard of but know nothing about it	18%	11%	19%	20%	24%
I have never heard of before	1%	2%	0%	1%	0%

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

Base: ORV riders who do not live in Northern Ontario (n=365). N0 How would you best describe your awareness of Northern Ontario?

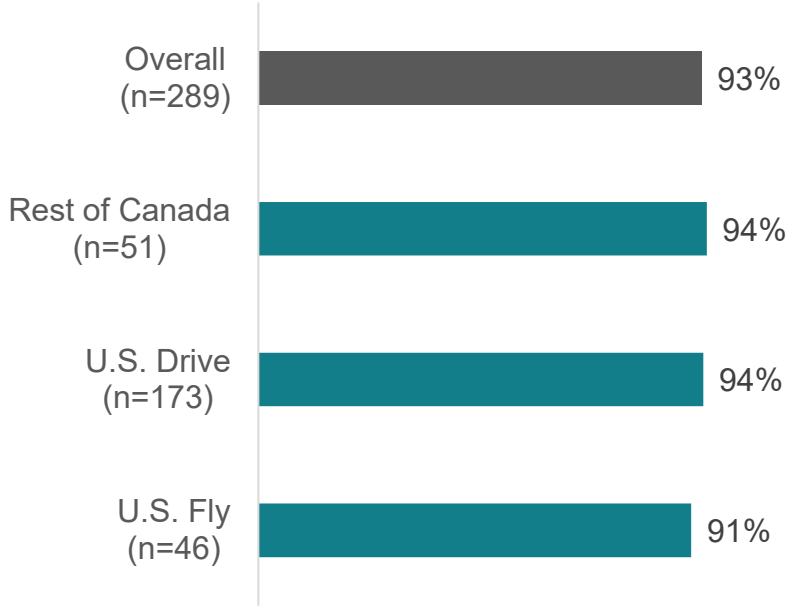
RATING OF NORTHERN ONTARIO FOR ORVING

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

More than nine in ten ORV riders who know Northern Ontario (93%) rate it 4 or 5 out of 5 as a pleasure travel destination for ORVing, including 51% who rate it excellent.

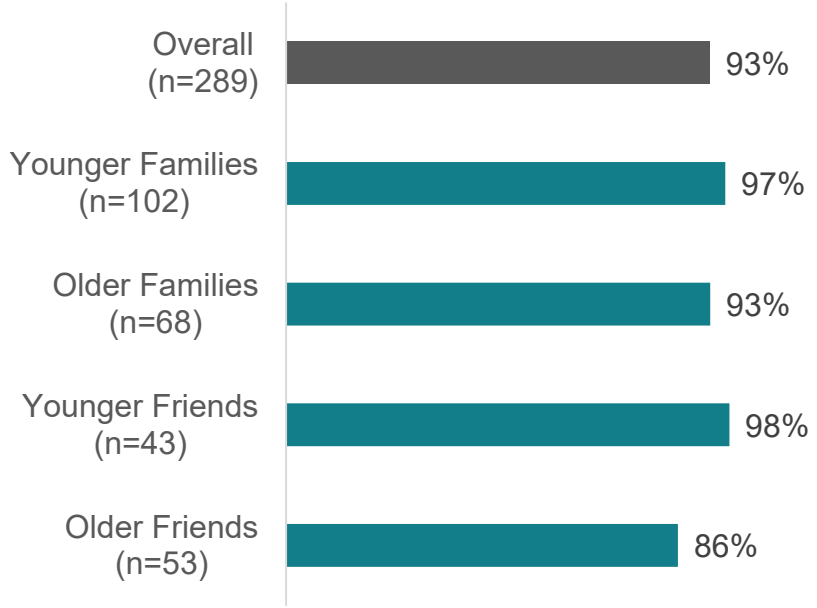
Ratings are high in every market and traveller type, from 86% among older friend groups to 98% among younger friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: ORV riders who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=289). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for ORVing? TOP2 = % rating 4 or 5 (1 = Poor, 5 = Excellent).

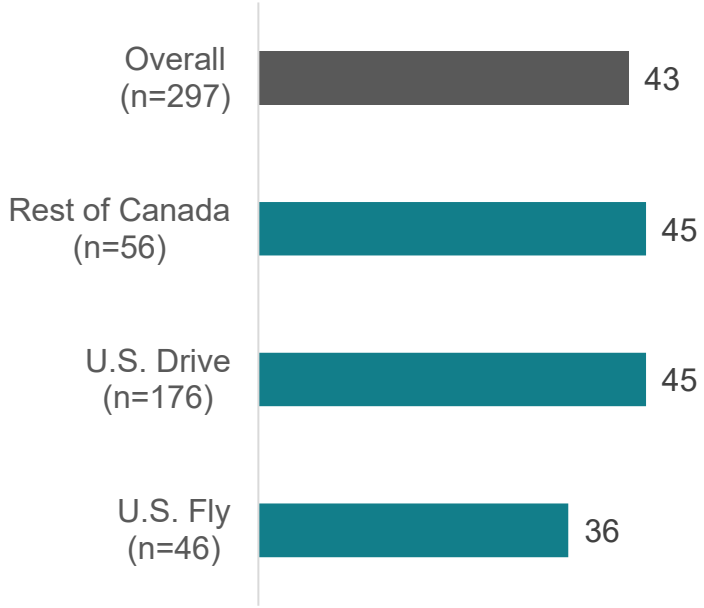
LIKELIHOOD TO RECOMMEND NORTHERN ONTARIO (NPS)

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

Northern Ontario has a Net Promoter Score (NPS) of 43 among ORV riders who know it, with 53% promoters and only 10% detractors.

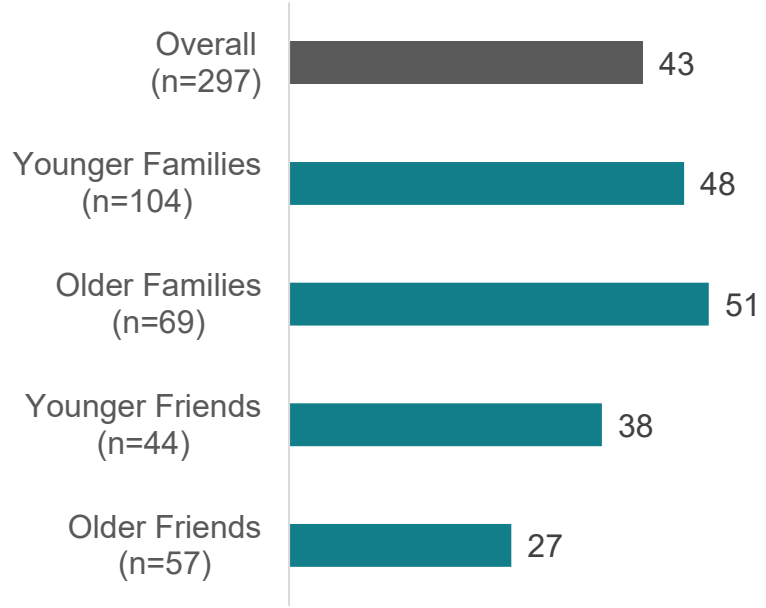
NPS ranges from 36 among U.S. Fly riders to 45 among Rest of Canada and U.S. Drive riders, and from 27 among older friend groups to 51 among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: ORV riders who know a lot or a little about Northern Ontario (n=297). N2 (NPS) How likely would you be to recommend Northern Ontario to a friend or colleague as a destination for ORVing? (0 = Not at all likely, 10 = Extremely likely) NPS = % promoters (9–10) minus % detractors (0–6).

PERCEPTIONS OF NORTHERN ONTARIO – MARKET

ORV riders who know a lot or a little about Northern Ontario

Almost all ORV riders who know Northern Ontario agree it offers a wide variety of routes, trails or waterways (95%) and is a destination they would seriously consider (95%), and 92% agree it offers excellent ORVing experiences and feels welcoming.

U.S. Drive riders are more likely than other markets to say they would seriously consider Northern Ontario (98%) and that they know enough to plan an ORVing trip there (88%).

Statement	Overall (n=296)	Rest of Canada (n=56)	U.S. Drive (n=175)	U.S. Fly (n=46)
Northern Ontario offers a wide variety of routes, trails, or waterways for ORVing	95%	95%	97%	89%
Northern Ontario is a destination I would seriously consider for ORVing	95%	86%	98% ▲	88%
Northern Ontario offers excellent ORVing experiences	92%	95%	94%	87%
Northern Ontario feels welcoming to travellers like me	92%	95%	94%	87%
I know enough about Northern Ontario to plan an ORVing trip there	80%	63%	88% ▲	68%
For ORVing, Northern Ontario is better than alternatives I could choose closer to home	79%	70%	81%	75%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=292 to 296). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

PERCEPTIONS OF NORTHERN ONTARIO – TRAVELLER TYPE

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

Older friend groups are less likely than other traveller types to agree they know enough about Northern Ontario to plan an ORVing trip there (61%).

Agreement with the other statements is high across traveller types.

Statement	Overall (n=296)	Younger Families (n=104)	Older Families (n=69)	Younger Friends (n=44)	Older Friends (n=57)
Northern Ontario offers a wide variety of routes, trails, or waterways for ORVing	95%	98%	96%	92%	91%
Northern Ontario is a destination I would seriously consider for ORVing	95%	97%	97%	91%	89%
Northern Ontario offers excellent ORVing experiences	92%	94%	94%	90%	87%
Northern Ontario feels welcoming to travellers like me	92%	92%	95%	90%	89%
I know enough about Northern Ontario to plan an ORVing trip there	80%	88%	71%	87%	61% ▼
For ORVing, Northern Ontario is better than alternatives I could choose closer to home	79%	87%	78%	72%	70%

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

Base: ORV riders who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=292 to 296). N3 (TOP2) Thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – MARKET

ORV riders who know a lot or a little about Northern Ontario

Agreement is high on every attribute, from 86% for rich Indigenous culture and heritage to 96% for pristine lakes and waterways, and 93% agree Northern Ontario has excellent ORV trails and backcountry terrain.

None of the market differences are significant.

Northern Ontario has…	Overall (n=295)	Rest of Canada (n=56)	U.S. Drive (n=175)	U.S. Fly (n=46)
Pristine lakes and waterways	96%	96%	95%	98%
Authentic campfire and wilderness experiences	95%	97%	94%	92%
Remote, untouched wilderness	94%	96%	93%	96%
Excellent ORV trails and backcountry terrain	93%	95%	94%	92%
Friendly and welcoming local communities	93%	90%	94%	93%
Dark skies ideal for stargazing	90%	93%	88%	92%
Opportunities to see the Northern Lights (Aurora Borealis)	88%	89%	89%	94%
Good value for money	87%	90%	88%	83%
Rich Indigenous culture and heritage	86%	78%	90%	83%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=286 to 295). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.

WHAT NORTHERN ONTARIO HAS TO OFFER – TRAVELLER TYPE

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

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

Every older friend group rider who knows Northern Ontario agrees it has remote, untouched wilderness (100%).

Northern Ontario has…	Overall (n=295)	Younger Families (n=104)	Older Families (n=69)	Younger Friends (n=44)	Older Friends (n=57)
Pristine lakes and waterways	96%	94%	97%	97%	97%
Authentic campfire and wilderness experiences	95%	96%	97%	91%	93%
Remote, untouched wilderness	94%	94%	94%	89%	100%
Excellent ORV trails and backcountry terrain	93%	93%	98%	92%	89%
Friendly and welcoming local communities	93%	93%	95%	92%	89%
Dark skies ideal for stargazing	90%	88%	97%	88%	87%
Opportunities to see the Northern Lights (Aurora Borealis)	88%	87%	92%	83%	89%
Good value for money	87%	89%	86%	89%	81%
Rich Indigenous culture and heritage	86%	91%	78%	87%	84%

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

Base: ORV riders who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=286 to 295). N3B (TOP2) Still thinking about Northern Ontario as a travel destination, how much do you agree or disagree with the following statements? Northern Ontario has… (flattened) TOP2 = % somewhat or strongly agree.

VIEW OF A TRIP TO NORTHERN ONTARIO – MARKET

All ORV riders | Includes past visitors to Northern Ontario

Nearly three-quarters of ORV riders (73%) view Northern Ontario as a destination of choice for ORVing, while a quarter (24%) see it as a destination of convenience.

Seeing it as a destination of choice ranges from 67% among Rest of Canada riders to 75% among U.S. Drive riders, with no significant market differences.

View of a trip	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
A destination of choice – somewhere I would specifically seek out for ORVing	73%	67%	75%	72%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	24%	30%	22%	23%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). N10 Which of the following best describes how you would view an ORVing trip to Northern Ontario?

"Not sure" (3%) not shown.

VIEW OF A TRIP TO NORTHERN ONTARIO – TRAVELLER TYPE

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

A destination of choice is the most common view for every traveller type, from 65% among older families to 79% among younger families.

None of the traveller type differences are significant.

View of a trip	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
A destination of choice – somewhere I would specifically seek out for ORVing	73%	79%	65%	69%	76%
A destination of convenience – somewhere I might go if it happens to fit my travel plans	24%	17%	31%	30%	21%

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

Base: all ORV riders (n=367). N10 Which of the following best describes how you would view an ORVing trip to Northern Ontario?

"Not sure" (3%) not shown.



FUTURE DEMAND & EXPERIENCES

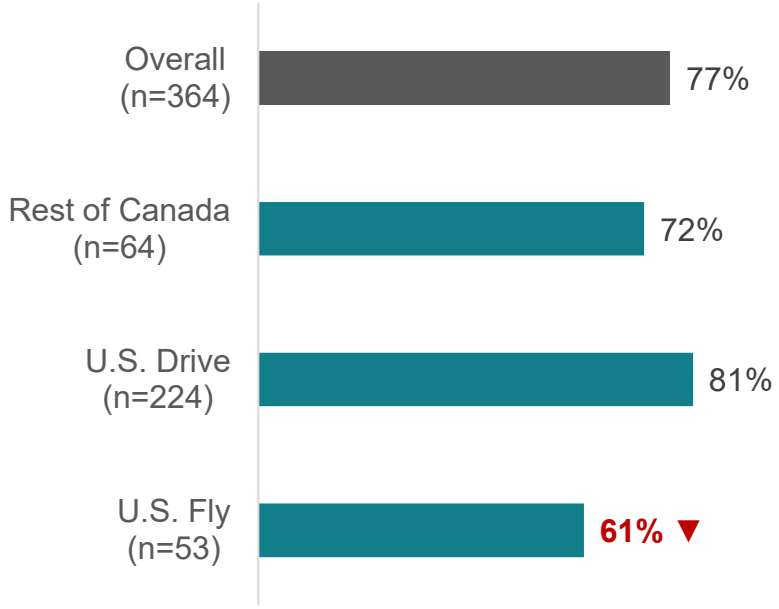
LIKELIHOOD TO VISIT NORTHERN ONTARIO IN THE NEXT 2 YEARS

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

Three-quarters of ORV riders (77%) are likely to visit Northern Ontario for an ORVing trip in the next two years, including 49% who are very likely.

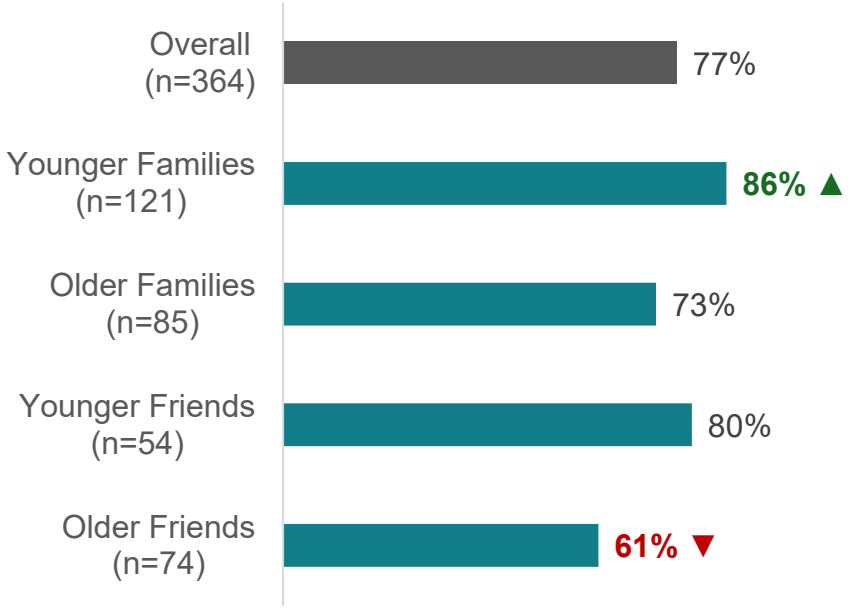
Likelihood is lower among U.S. Fly riders (61%) and older friend groups (61%), and higher among younger families (86%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders, excluding “Don’t know” (n=364). N4 (TOP2) How likely are you to visit Northern Ontario for an ORVing trip in the next 2 years? TOP2 = % somewhat or very likely.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – MARKET

All ORV riders | Includes past visitors to Northern Ontario

Six in ten ORV riders (58%) would make Northern Ontario the primary destination of an ORVing trip, with brief stops elsewhere, and 21% would make it the only destination.

U.S. Drive riders are less likely than other markets to see it as a secondary stop on a trip focused elsewhere (1%).

Role of Northern Ontario	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
It would be the only destination of the trip	21%	11%	23%	24%
It would be the primary destination, with brief stops elsewhere	58%	59%	60%	47%
It would be one of several equal destinations	15%	17%	13%	23%
It would be a secondary stop on a trip focused elsewhere	3%	10%	1% ▼	6%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). N5 If you were to visit Northern Ontario for ORVing, which of the following best describes the role it would play in your trip?

“Not sure” (2%) not shown.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – TRAVELLER TYPE

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

Younger friend groups are less likely than other traveller types to make Northern Ontario the primary destination with brief stops elsewhere (41%), and the most likely to make it the only destination (30%).

Younger families (64%) and older friend groups (62%) are the most likely to make it the primary destination.

Role of Northern Ontario	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
It would be the only destination of the trip	21%	17%	23%	30%	22%
It would be the primary destination, with brief stops elsewhere	58%	64%	53%	41% ▼	62%
It would be one of several equal destinations	15%	16%	13%	23%	11%
It would be a secondary stop on a trip focused elsewhere	3%	3%	3%	4%	4%

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

Base: all ORV riders (n=367). N5 If you were to visit Northern Ontario for ORVing, which of the following best describes the role it would play in your trip?

"Not sure" (2%) not shown.

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

All ORV riders | Includes past visitors to Northern Ontario

Nearly nine in ten or more ORV riders say each of these factors is important when deciding whether to visit Northern Ontario, led by the variety of ORVing routes or areas available (93%).

None of the market differences are significant.

Factor	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Variety and range of ORVing routes or areas available	93%	92%	93%	91%
Safety and reliability of the destination	92%	96%	91%	95%
Access to nature and wilderness	92%	95%	92%	89%
Quality/condition of routes, trails, or waterways for ORVing (e.g., road/trail surface, grooming, water conditions)	92%	92%	92%	94%
Quality of accommodation options	90%	91%	91%	83%
Licensing, registration or permit requirements that are clear and manageable	90%	80%	91%	93%
Ability to get away from it all	90%	87%	91%	86%
Travel time and ease of access	90%	82%	91%	90%
Cost and overall affordability	89%	90%	89%	91%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders, excluding “Don’t know”; bases vary by item (n=361 to 367). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for ORVing? (flattened) TOP2 = % somewhat or very important.

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

All ORV riders | Includes past visitors to Northern Ontario

Fewer say activities for non-ORVing companions (77%), connectivity (77%), outfitters or guides (64%), Indigenous cultural experiences (60%) or ORVing events (50%) are important, while infrastructure (86%), accommodation availability (86%) and reputation (81%) are rated more highly.

Outfitters and guides are rated lowest by Rest of Canada riders (48%), although market differences are not significant.

Factor	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	86%	82%	90%	76%
More accommodation available during the times I want to visit	86%	82%	89%	80%
Strong reputation or positive word of mouth	81%	73%	81%	84%
Availability of activities for non-ORVing travel companions	77%	78%	78%	74%
Cell phone or internet connectivity at the destination	77%	70%	77%	82%
Availability of outfitters, guides, or operators	64%	48%	67%	74%
Indigenous cultural experiences	60%	51%	62%	62%
ORVing events or competitions	50%	47%	49%	55%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders, excluding “Don’t know”; bases vary by item (n=361 to 367). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for ORVing? (flattened) TOP2 = % somewhat or very important.

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

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

Younger friend groups place less importance than other traveller types on clear and manageable licensing or permit requirements (77%).

The other factors on this slide are rated important by more than eight in ten of every traveller type.

Factor	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Variety and range of ORVing routes or areas available	93%	95%	92%	88%	94%
Safety and reliability of the destination	92%	92%	93%	88%	92%
Access to nature and wilderness	92%	90%	93%	90%	93%
Quality/condition of routes, trails, or waterways for ORVing (e.g., road/trail surface, grooming, water conditions)	92%	92%	93%	94%	92%
Quality of accommodation options	90%	88%	91%	96%	86%
Licensing, registration or permit requirements that are clear and manageable	90%	89%	97%	77% ▼	94%
Ability to get away from it all	90%	93%	89%	82%	90%
Travel time and ease of access	90%	92%	92%	83%	83%
Cost and overall affordability	89%	91%	92%	89%	84%

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

Base: all ORV riders, excluding “Don’t know”; bases vary by item (n=361 to 367). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for ORVing? (flattened) TOP2 = % somewhat or very important.

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

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

Younger families are more likely than other traveller types to value ORVing events or competitions (63%).

Older friend groups place the least importance on events (30%) and Indigenous cultural experiences (50%).

Factor	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Availability of activity-specific infrastructure (e.g., secure storage, trail access from accommodations, launch facilities, staging areas)	86%	89%	87%	86%	80%
More accommodation available during the times I want to visit	86%	84%	89%	87%	82%
Strong reputation or positive word of mouth	81%	85%	77%	75%	82%
Availability of activities for non-ORVing travel companions	77%	80%	81%	73%	71%
Cell phone or internet connectivity at the destination	77%	74%	77%	81%	75%
Availability of outfitters, guides, or operators	64%	69%	63%	57%	62%
Indigenous cultural experiences	60%	62%	62%	64%	50%
ORVing events or competitions	50%	63% ▲	38%	65%	30%

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

Base: all ORV riders, excluding “Don’t know”; bases vary by item (n=361 to 367). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for ORVing? (flattened) TOP2 = % somewhat or very important.

PREFERRED ACCESS TYPES – MARKET

All ORV riders

Nine in ten ORV riders (89%) prefer road-accessible areas for an ORVing trip to Northern Ontario, while a quarter prefer remote boat-in (25%) or train-in access (25%) and 20% fly-in or float plane access.

Remote access types are least preferred by Rest of Canada riders, although market differences are not significant.

Access type	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Road-accessible areas	89%	92%	89%	87%
Remote boat-in access	25%	13%	28%	30%
Train-in access	25%	18%	23%	34%
Fly-in or float plane access	20%	7%	22%	31%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). N7 For an ORVing trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (1%) not shown.

PREFERRED ACCESS TYPES – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Older friend groups are less likely than other traveller types to prefer train-in access (6%).

Younger families show the highest preference for remote boat-in access (33%).

Access type	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Road-accessible areas	89%	87%	93%	82%	96%
Remote boat-in access	25%	33%	18%	19%	25%
Train-in access	25%	31%	31%	28%	6% ▼
Fly-in or float plane access	20%	28%	14%	28%	9%

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

Base: all ORV riders (n=367). N7 For an ORVing trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (1%) not shown.

PREFERRED LODGING OPTIONS – MARKET

All ORV riders

ORV riders' lodging preferences are spread across several options, led by designated campgrounds (47%), short-term rentals (47%), drive-in lodges or resorts (46%) and commercial cottage or cabin rentals (44%).

U.S. Fly riders show the highest preference for designated campgrounds (62%) and drive-in lodges (56%). None of the market differences are significant.

Lodging option	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Designated campground (private or provincial park)	47%	49%	43%	62%
Short-term rental (e.g., AirBnB, Vrbo)	47%	42%	48%	46%
Drive-in lodge or resort	46%	37%	48%	56%
Commercial cottage or cabin rental	44%	52%	41%	53%
Private cottage (owned or borrowed)	42%	29%	41%	51%
Backcountry or wilderness camping	42%	51%	36%	50%
Hotel or motel	40%	37%	42%	48%
Home of friends or relatives (unpaid)	19%	20%	15%	22%
Fly-in or remote outpost camp	11%	3%	12%	21%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). N8 Which of the following lodging options would you prefer on an ORVing trip to Northern Ontario? Please select all that apply.

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

PREFERRED LODGING OPTIONS – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Older families show the highest preference for commercial cottage or cabin rentals (61%) and designated campgrounds (55%).

None of the traveller type differences are significant.

Lodging option	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Designated campground (private or provincial park)	47%	50%	55%	36%	53%
Short-term rental (e.g., AirBnB, Vrbo)	47%	52%	46%	36%	39%
Drive-in lodge or resort	46%	49%	43%	40%	53%
Commercial cottage or cabin rental	44%	41%	61%	32%	43%
Private cottage (owned or borrowed)	42%	49%	33%	32%	49%
Backcountry or wilderness camping	42%	45%	40%	47%	37%
Hotel or motel	40%	46%	35%	39%	47%
Home of friends or relatives (unpaid)	19%	23%	15%	20%	19%
Fly-in or remote outpost camp	11%	15%	7%	17%	9%

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

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

Base: all ORV riders (n=367). N8 Which of the following lodging options would you prefer on an ORVing trip to Northern Ontario? Please select all that apply.

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

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

ORV riders who have visited Northern Ontario in the past 5 years

Better value for money (35%) would most encourage past-five-year visitors to spend more nights in Northern Ontario, followed by better connectivity (29%), improved access infrastructure (28%), more things to do for companions (27%) and better trail conditions and grooming (26%).

U.S. Fly visitors show the highest interest in most of these improvements, although their base is small. None of the market differences are significant.

Factor	Overall (n=236)	Rest of Canada (n=46)	U.S. Drive (n=141)	U.S. Fly* (n=29)
Better value for money overall	35%	23%	32%	47%
Better cell or internet connectivity	29%	32%	25%	41%
Improved road, trail, or water access infrastructure	28%	25%	25%	40%
More things to do beyond ORVing for my travel companions	27%	18%	30%	32%
Better trail conditions and grooming	26%	16%	24%	41%
Better availability of secure equipment or vehicle storage	25%	23%	23%	43%
More packaged or all-inclusive experiences	24%	12%	28%	22%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (0%) not shown.

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

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

ORV riders who have visited Northern Ontario in the past 5 years

About one in five would stay longer with better paid accommodation (23%) or more accommodation availability (22%), and 12% are already satisfied with the length of their stays.

Rest of Canada visitors are more likely than other markets to name another factor (7%).

Factor	Overall (n=236)	Rest of Canada (n=46)	U.S. Drive (n=141)	U.S. Fly* (n=29)
Better availability of quality paid accommodation (lodges, hotels, cottages)	23%	17%	18%	48%
More accommodation available during the times I want to visit	22%	25%	23%	19%
Indigenous cultural experiences	19%	19%	19%	22%
Events or competitions timed to my travel	18%	15%	17%	39%
A guided multi-stop itinerary combining activities or sub-regions	17%	7%	19%	33%
Other	1%	7% ▲	0%	0%
Nothing – I am already satisfied with the length of my stays	12%	11%	15%	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (0%) not shown.

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

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

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

Older friend groups are the most likely to cite better value for money (43%), and younger families improved access infrastructure (37%) and secure storage (36%).

None of the traveller type differences are significant.

Factor	Overall (n=236)	Younger Families (n=91)	Older Families (n=57)	Younger Friends (n=37)	Older Friends* (n=30)
Better value for money overall	35%	39%	30%	23%	43%
Better cell or internet connectivity	29%	34%	31%	28%	26%
Improved road, trail, or water access infrastructure	28%	37%	21%	32%	13%
More things to do beyond ORVing for my travel companions	27%	32%	24%	25%	15%
Better trail conditions and grooming	26%	29%	22%	28%	16%
Better availability of secure equipment or vehicle storage	25%	36%	20%	26%	8%
More packaged or all-inclusive experiences	24%	21%	34%	28%	9%

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

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (0%) not shown.

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

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

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

Older friend groups are the most likely to be already satisfied with the length of their stays (23%).

None of the traveller type differences are significant.

Factor	Overall (n=236)	Younger Families (n=91)	Older Families (n=57)	Younger Friends (n=37)	Older Friends* (n=30)
Better availability of quality paid accommodation (lodges, hotels, cottages)	23%	31%	16%	22%	12%
More accommodation available during the times I want to visit	22%	28%	30%	21%	4%
Indigenous cultural experiences	19%	20%	27%	18%	6%
Events or competitions timed to my travel	18%	16%	18%	18%	23%
A guided multi-stop itinerary combining activities or sub-regions	17%	20%	22%	14%	6%
Other	1%	3%	0%	0%	0%
Nothing – I am already satisfied with the length of my stays	12%	9%	14%	12%	23%

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

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (0%) not shown.

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



BARRIERS & COMPETITION

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

All ORV riders | Includes past visitors to Northern Ontario

Cost (31%), expensive licensing or permit requirements (30%) and wildfires or other environmental disruptions (29%) are the most common barriers to visiting or returning to Northern Ontario for ORVing.

Rest of Canada riders are the most concerned about most of these barriers, including poor value for money (44%) and transportation costs (43%), while U.S. Drive riders are less likely to cite poor value for money (21%).

Barrier	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Cost	31%	39%	29%	35%
Expensive licensing, registration, or permit requirements	30%	37%	28%	31%
Wildfires, flooding, or other environmental disruptions	29%	34%	26%	27%
Unfavourable weather or season timing	28%	38%	28%	23%
High transportation costs (gas, airfare)	28%	43%	24%	28%
Poor value for money	27%	44%	21% ▼	31%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for ORVing? Please select all that apply.

"Not sure" (5%) not shown.

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

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

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

All ORV riders | Includes past visitors to Northern Ontario

About a quarter of ORV riders are discouraged by safety concerns (27%), poor access (27%) or complicated licensing (25%), and about one in five by unclear regulations (23%), poor trail grooming (20%) or distance (18%).

Among U.S. riders, 27% of U.S. Drive and 21% of U.S. Fly riders cite anti-American sentiment.

Barrier	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Concerns about safety	27%	29%	29%	20%
Poor road, trail, or water access	27%	30%	25%	35%
Complicated licensing, registration, or permit requirements	25%	35%	23%	27%
Unfamiliar or unclear regulations	23%	35%	20%	23%
Poor trail grooming or maintenance	20%	14%	22%	18%
Anti-American sentiment	20%	–	27%	21%
Too far to drive	18%	29%	14%	26%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for ORVing? Please select all that apply.

"Not sure" (5%) not shown.

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

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

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

All ORV riders | Includes past visitors to Northern Ontario

Fewer than one in five ORV riders are discouraged by each of the barriers on this slide.

About one in five U.S. riders cite border-crossing concerns (18% of U.S. Drive and 23% of U.S. Fly). None of the market differences are significant.

Barrier	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Limited accommodation options	18%	27%	15%	21%
Poor or unreliable cell phone or internet connectivity	17%	11%	17%	22%
Vehicle registration or insurance requirements across jurisdictions	17%	17%	15%	25%
Difficulty finding reliable trip planning information	16%	30%	15%	8%
Lack of amenities or services at the destination	15%	18%	14%	17%
Concerns about crossing the Canada-US border	15%	–	18%	23%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for ORVing? Please select all that apply.

"Not sure" (5%) not shown.

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

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

All ORV riders | Includes past visitors to Northern Ontario

Fewer than one in seven ORV riders are discouraged by each remaining barrier.

Rest of Canada riders are more likely than other markets to be discouraged by insects (37%), while U.S. Drive riders are less likely (8%).

Barrier	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Insects (e.g., blackflies, mosquitoes)	14%	37% ▲	8% ▼	10%
Availability of campsites or RV sites	13%	16%	10%	20%
Lack of secure equipment or vehicle storage	12%	13%	12%	17%
I do not know enough about Northern Ontario's ORVing opportunities	11%	21%	7%	14%
Too remote or rugged for my comfort level	10%	6%	9%	14%
Not sure the ORVing quality would meet my expectations	6%	11%	5%	7%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for ORVing? Please select all that apply.

"Not sure" (5%) not shown.

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

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

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

Older friend groups are more likely than other traveller types to be discouraged by poor value for money (50%), while younger friend groups are less likely (13%).

Younger friend groups are also less likely to cite expensive licensing requirements (15%), and older friend groups are the most likely (44%).

Barrier	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Cost	31%	31%	34%	30%	31%
Expensive licensing, registration, or permit requirements	30%	28%	37%	15% ▼	44%
Wildfires, flooding, or other environmental disruptions	29%	28%	41%	19%	31%
Unfavourable weather or season timing	28%	24%	35%	27%	29%
High transportation costs (gas, airfare)	28%	30%	32%	21%	31%
Poor value for money	27%	24%	25%	13% ▼	50% ▲

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

Base: all ORV riders (n=367). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for ORVing? Please select all that apply.

"Not sure" (5%) not shown.

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

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

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

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

Barriers on this slide are cited by 40% or fewer of every traveller type, with no significant differences.

Older friend groups are the most likely to cite safety concerns (40%), poor access (37%) and unclear regulations (32%).

Barrier	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Concerns about safety	27%	20%	30%	25%	40%
Poor road, trail, or water access	27%	25%	32%	22%	37%
Complicated licensing, registration, or permit requirements	25%	27%	27%	12%	28%
Unfamiliar or unclear regulations	23%	20%	29%	19%	32%
Poor trail grooming or maintenance	20%	21%	17%	18%	27%
Anti-American sentiment	20%	22%	21%	10%	23%
Too far to drive	18%	18%	15%	16%	24%

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

Base: all ORV riders (n=367). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for ORVing? Please select all that apply.

"Not sure" (5%) not shown.

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

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

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

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

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

None of the traveller type differences are significant.

Barrier	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Limited accommodation options	18%	17%	19%	12%	24%
Poor or unreliable cell phone or internet connectivity	17%	16%	21%	18%	17%
Vehicle registration or insurance requirements across jurisdictions	17%	15%	24%	14%	19%
Difficulty finding reliable trip planning information	16%	15%	20%	12%	18%
Lack of amenities or services at the destination	15%	19%	7%	12%	20%
Concerns about crossing the Canada-US border	15%	16%	18%	11%	15%

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

Base: all ORV riders (n=367). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for ORVing? Please select all that apply.

"Not sure" (5%) not shown.

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

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

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

Each barrier on this slide is cited by one in five or fewer in every traveller type.

None of the traveller type differences are significant.

Barrier	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Insects (e.g., blackflies, mosquitoes)	14%	19%	12%	18%	6%
Availability of campsites or RV sites	13%	12%	16%	10%	18%
Lack of secure equipment or vehicle storage	12%	15%	7%	16%	15%
I do not know enough about Northern Ontario's ORVing opportunities	11%	7%	11%	15%	16%
Too remote or rugged for my comfort level	10%	10%	12%	12%	7%
Not sure the ORVing quality would meet my expectations	6%	6%	3%	7%	9%

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

Base: all ORV riders (n=367). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for ORVing? Please select all that apply.

"Not sure" (5%) not shown.

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

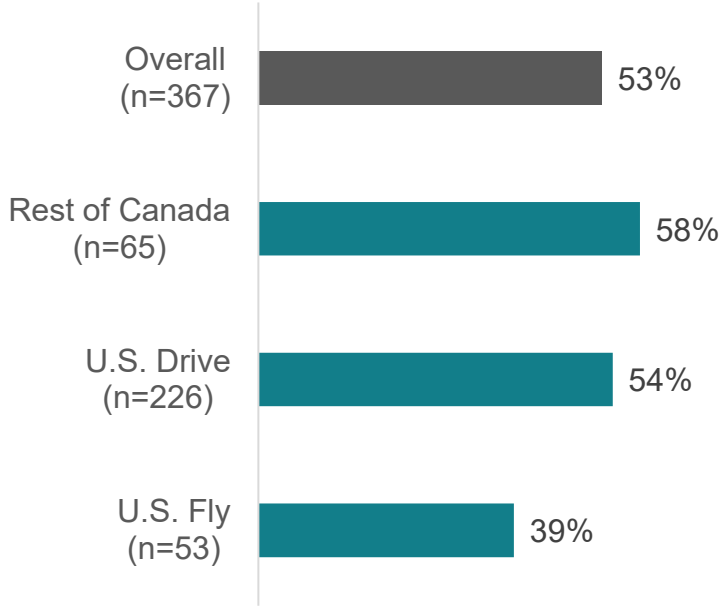
IMPACT OF FINANCIAL PRESSURES ON TRAVEL PLANS

All ORV riders | Traveller types are defined on slide 10

Half of ORV riders (53%) agree that financial pressures have impacted their travel plans in the next 12 months.

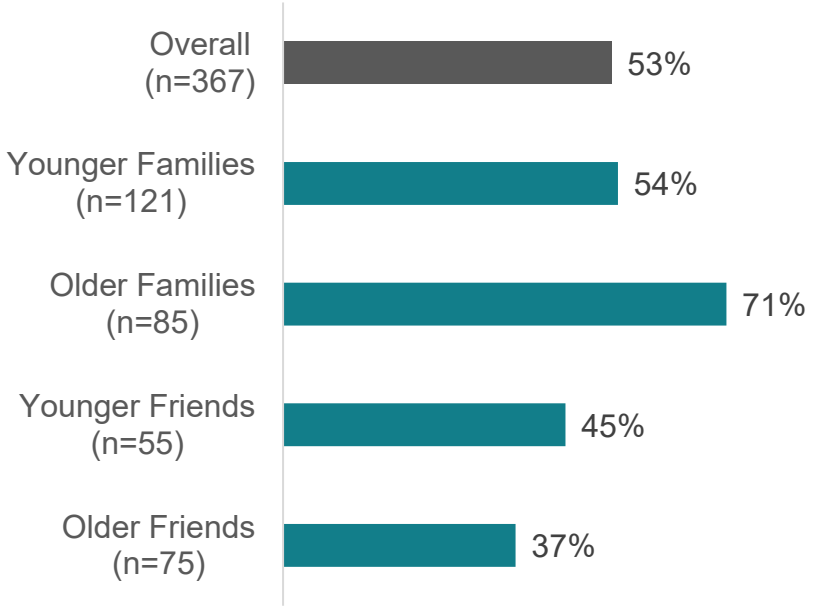
Agreement ranges from 39% among U.S. Fly riders to 58% among Rest of Canada riders, and from 37% among older friend groups to 71% among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders, excluding “Don’t know” (n=367). BD1A (TOP2) How much do you agree or disagree with the following statement? "Financial pressures have impacted my travel plans in the next 12 months" TOP2 = % somewhat or strongly agree.

OTHER DESTINATIONS CONSIDERED – MARKET (1 OF 2)

All ORV riders

Michigan (30%), Colorado (30%) and British Columbia (29%) are the destinations ORV riders most often consider instead of Northern Ontario.

Rest of Canada riders are more likely than other markets to consider British Columbia (66%) and Alberta (59%), while U.S. Drive riders are less likely to consider either. U.S. Drive riders most often consider Michigan (42%), and U.S. Fly riders Colorado (68%) and Texas (43%).

Destination	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
Michigan	30%	–	42%	31%
Colorado	30%	–	32%	68%
British Columbia	29%	66% ▲	16% ▼	36%
Wisconsin	22%	–	30%	27%
Pennsylvania	22%	–	33%	10%
Alberta	21%	59% ▲	11% ▼	17%
Quebec	20%	17%	17%	23%
Texas	18%	–	20%	43%
Somewhere else in Ontario	18%	17%	18%	9%
Minnesota	17%	–	21%	26%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). BD2 What other destinations do you consider for ORVing trips?

"Not sure" (1%) not shown.

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

OTHER DESTINATIONS CONSIDERED – MARKET (2 OF 2)

All ORV riders

Fewer than one in six ORV riders consider each of the remaining destinations, and 4% name another destination.

U.S. Drive riders are less likely than other markets to consider Saskatchewan (9%) and Manitoba (7%), and U.S. Fly riders often consider California (39%).

Destination	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
California	16%	–	16%	39%
New York	15%	–	22%	11%
Ohio	15%	–	22%	8%
Saskatchewan	13%	25%	9% ▼	16%
Manitoba	12%	21%	7% ▼	11%
Indiana	11%	–	16%	11%
Illinois	10%	–	15%	5%
New Jersey	10%	–	14%	10%
Other	4%	6%	3%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). BD2 What other destinations do you consider for ORVing trips?

"Not sure" (1%) not shown.

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

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (1 OF 2)

All ORV riders | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to consider somewhere else in Ontario (27%), while older friend groups are less likely to consider Quebec (6%).

Consideration of British Columbia and Alberta is similar across traveller types.

Destination	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
Michigan	30%	31%	29%	24%	39%
Colorado	30%	33%	28%	24%	34%
British Columbia	29%	34%	29%	25%	28%
Wisconsin	22%	21%	22%	15%	28%
Pennsylvania	22%	24%	28%	17%	13%
Alberta	21%	24%	26%	20%	15%
Quebec	20%	23%	19%	29%	6% ▼
Texas	18%	28%	7%	16%	22%
Somewhere else in Ontario	18%	27% ▲	12%	17%	9%
Minnesota	17%	23%	9%	20%	16%

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

Base: all ORV riders (n=367). BD2 What other destinations do you consider for ORVing trips?

"Not sure" (1%) not shown.

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

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (2 OF 2)

All ORV riders | Traveller types are defined on slide 10

Consideration of each remaining Canadian destination is 17% or lower for every traveller type.

Older friend groups are the most likely to name another destination (11%).

Destination	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
California	16%	24%	10%	21%	12%
New York	15%	18%	19%	14%	8%
Ohio	15%	17%	11%	15%	19%
Saskatchewan	13%	17%	14%	7%	8%
Manitoba	12%	17%	9%	6%	8%
Indiana	11%	12%	10%	6%	15%
Illinois	10%	12%	7%	5%	12%
New Jersey	10%	12%	9%	8%	5%
Other	4%	1%	6%	1%	11%

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

Base: all ORV riders (n=367). BD2 What other destinations do you consider for ORVing trips?

"Not sure" (1%) not shown.

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

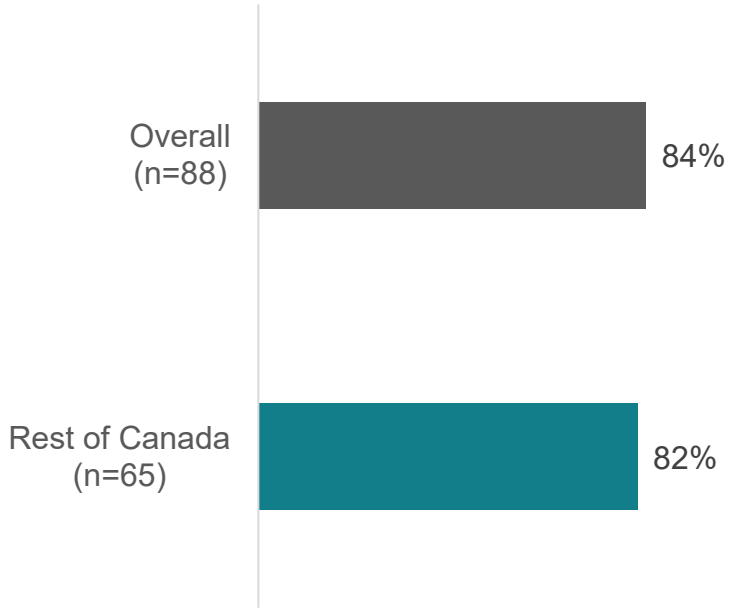
POLITICAL CLIMATE AND CHOOSING NORTHERN ONTARIO

Canadian ORV riders | Traveller types are defined on slide 10

More than eight in ten Canadian ORV riders (84%) are more likely to choose Northern Ontario over the United States because of the current political climate in the U.S., including 65% who strongly agree.

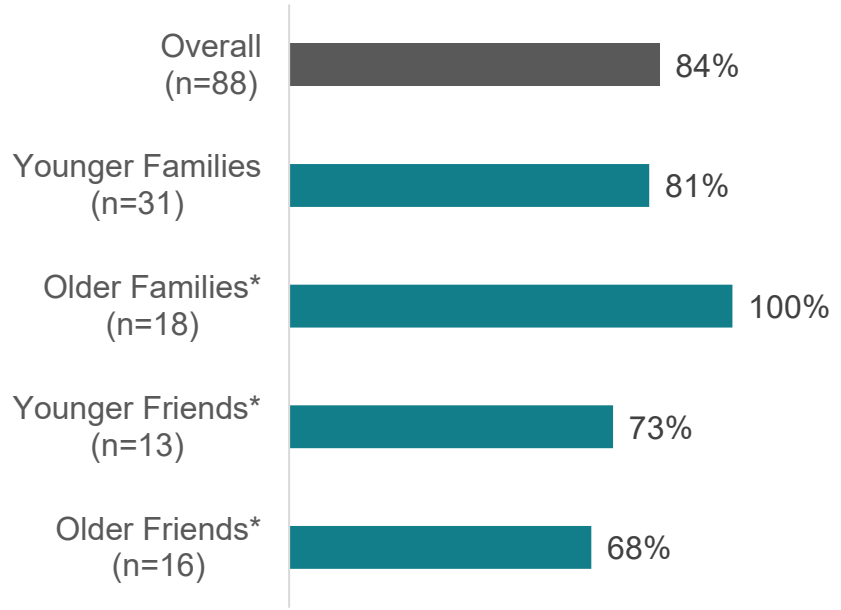
Agreement is 82% among Rest of Canada riders. Most traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian ORV riders, excluding “Don’t know” (n=88). BD3A (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of the current political climate in the U.S.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

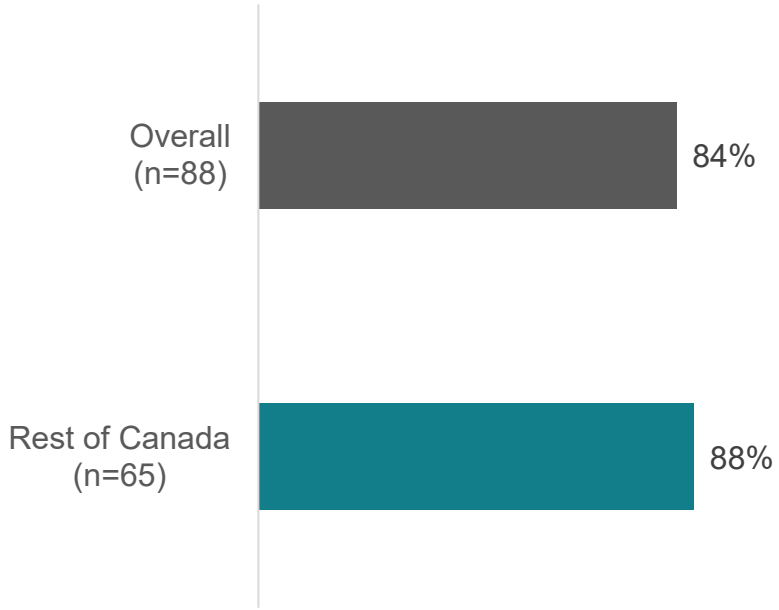
EXCHANGE RATES AND CHOOSING NORTHERN ONTARIO

Canadian ORV riders | Traveller types are defined on slide 10

More than eight in ten Canadian ORV riders (84%) are more likely to choose Northern Ontario over the United States because of unfavourable exchange rates.

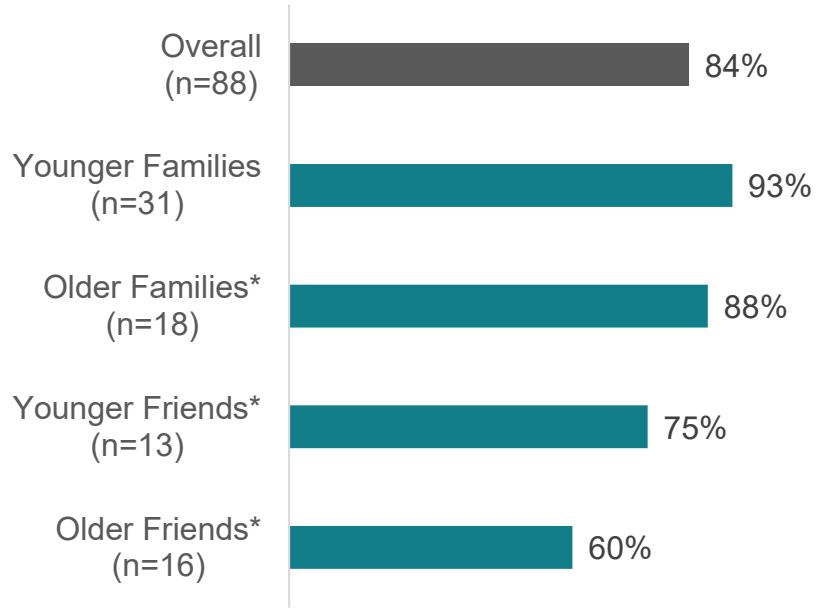
Agreement is 88% among Rest of Canada riders. Most traveller type bases are small for this question.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian ORV riders, excluding “Don’t know” (n=88). BD3B (TOP2) [I am more likely to choose Northern Ontario over the United States for travel because of unfavourable exchange rates.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree. *Small base (n<30); interpret with caution.

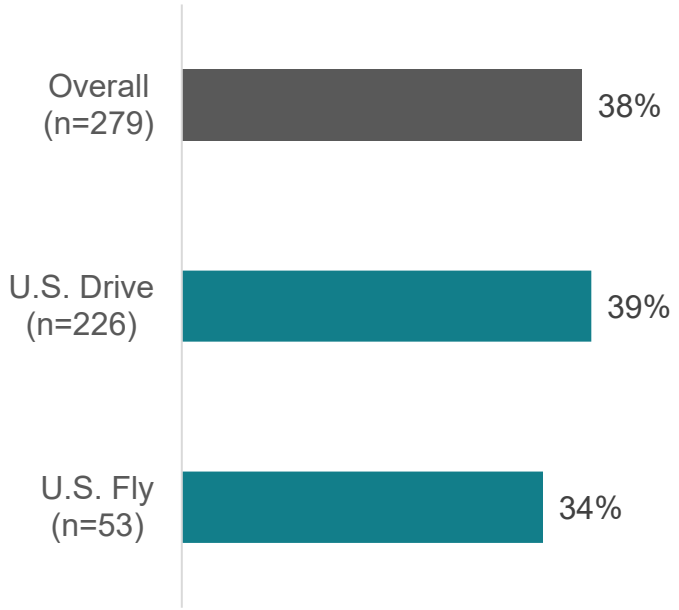
CONCERN ABOUT CROSSING THE BORDER INTO CANADA

U.S. ORV riders | Traveller types are defined on slide 10

Four in ten U.S. ORV riders (38%) are concerned about crossing the border to enter Canada, while 47% are not concerned.

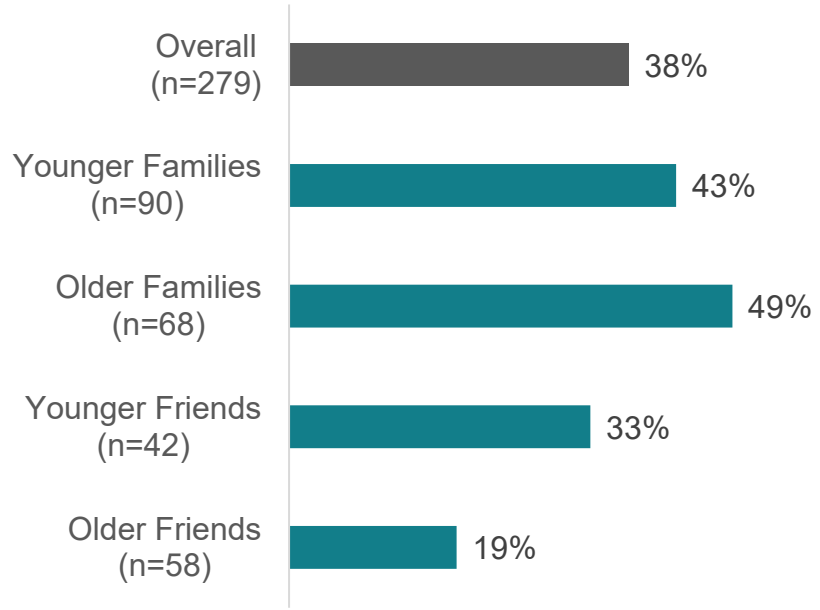
Concern is 39% among U.S. Drive riders and 34% among U.S. Fly riders, and ranges from 19% among older friend groups to 49% among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. ORV riders, excluding “Don’t know” (n=279). BD4A (TOP2) [I am concerned about crossing the border to enter Canada.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.

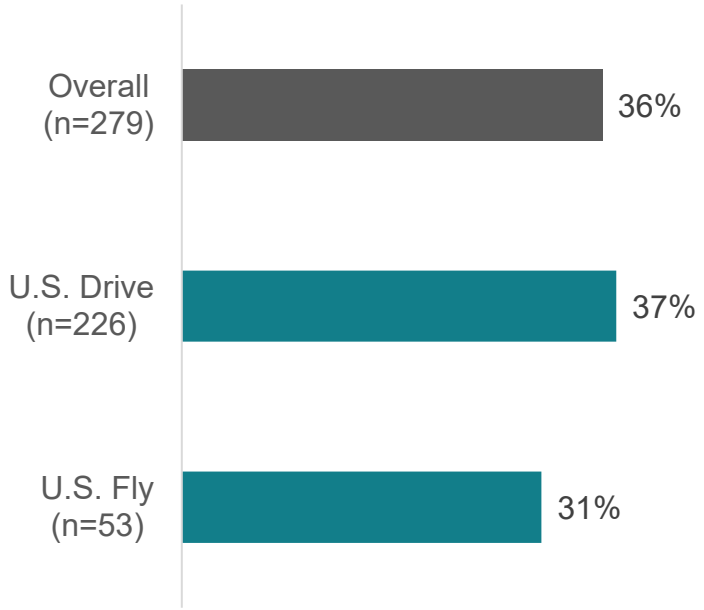
CONCERN ABOUT RETURNING TO THE U.S.

U.S. ORV riders | Traveller types are defined on slide 10

About a third of U.S. ORV riders (36%) are concerned about crossing the border when returning to the U.S. from Canada.

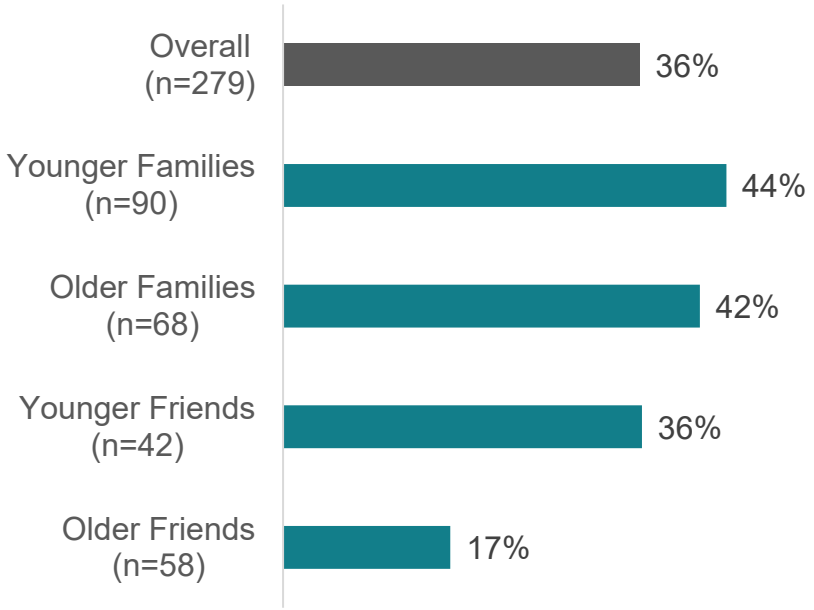
Concern is 37% among U.S. Drive riders and 31% among U.S. Fly riders, and ranges from 17% among older friend groups to 44% among younger families.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. ORV riders, excluding “Don’t know” (n=279). BD4B (TOP2) [I am concerned about crossing the border returning to the US from Canada.] How much do you agree or disagree with the following statements? TOP2 = % somewhat or strongly agree.