CONTEXT IS EVERYTHING

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

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

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

PAST NORTHERN ONTARIO VISITORS - AVID ORV RIDERS

Two-thirds of ORV riders have ridden in Northern Ontario in the past five years, and they are newer, more avid riders. Past visitors are mostly U.S. Drive (60%), Rest of Canada (20%) and U.S. Fly (12%) riders. Six in ten (60%) are aged 30 to 44, 77% have children at home and 43% have been riding for 6 to 10 years. Nearly half (47%) strongly agree ORVing is central to who they are, half (50%) mix guided and self-guided riding, 64% have used a certified trail network, and they take 5.2 ORV trips a year. (See slides 18, 56, 58, 62)

Their trips are long and high-spending. Visitors have made an average of 3.0 trips to Northern Ontario in five years, mostly in summer (47%), fall (21%) and spring (20%). Their most recent trip lasted 4.6 nights. Two-thirds (64%) stayed in paid roofed lodging, designated campgrounds were the most used accommodation (34%), and 60% bought a trail pass or paid a day-use fee. (See slides 17, 23, 25, 26, 28, 30)

They rate the trip highly, and value would extend their stays. More than eight in ten (82%) rated their trip better than ORVing elsewhere, including 50% much better. Half (50%) are taking more trips than 10 years ago, rising to 59% of younger families. Better value (35%), connectivity (29%), improved access (28%) and more for companions to do (27%) would extend their stays. (See slides 19, 20, 34, and slides 129–130 of the All ORV Riders report)



EXECUTIVE SUMMARY – PAST VISITORS: HOW THEY COMPARE WITH ALL ORV RIDERS

PAST NORTHERN ONTARIO VISITORS - AVID ORV RIDERS

Past visitors are newer but more avid riders. Fewer past visitors than ORV riders overall have ridden for more than 10 years (29% vs. 39%), yet they take more ORV trips a year (5.2 vs. 4.7) and longer ones (4.3 vs. 3.8 nights). More strongly agree that ORVing is central to who they are (47% vs. 39%), and they are more likely to have children at home (77% vs. 65%), to have used a certified trail network (64% vs. 51%) and to mix guided and self-guided riding (50% vs. 40%). (See slides 36, 56, 58, 62, 64)

Past visitors know the region better and are less deterred by cost and permits. More than half of past visitors (54%) know a lot about Northern Ontario, against 35% of ORV riders overall. They are less likely to cite poor value (19% vs. 27%), expensive permits (22% vs. 30%), transportation costs (23% vs. 28%) and unclear regulations (16% vs. 23%). Safety concern is the exception, at the same level (27%). (See slides 42–44)

Past visitors want less packaging and rely less on word of mouth. They are less interested than ORV riders overall in scenic driving (44% vs. 52%), all-inclusive packages (31% vs. 37%) and culinary experiences (32% vs. 36%), and less motivated by new places (50% vs. 59%) and nature (55% vs. 62%). They rely less on word of mouth (44% vs. 54%). Almost all past visitors (96%) are likely to visit again in the next two years, against 77% overall. (See slide 40)



EXECUTIVE SUMMARY – SUB-REGIONAL PATTERNS

PAST NORTHERN ONTARIO VISITORS - AVID ORV RIDERS

Riders spread evenly across the five regions, so each region plays a different role. Between 25% and 30% of ORV riders have visited each region, led by The Great Canadian Wilderness and Northeast Ontario (30% each). (See slide 21)

Algoma Country: grow the best-rated region with access and things for companions to do. Algoma visitors are the most likely to rate their trip better than elsewhere (88%) and want more access infrastructure (36%), more for companions to do (36%) and better trail conditions (34%). They are also the most drawn to Northern Lights viewing (61%). The practical priority is access and trail upkeep, non-riding activities for companions, and winter and dark-sky add-ons.

Superior Country: reduce friction around safety, permits and rules. Riders who visited Superior Country are more likely than other region visitors to cite safety (35%), expensive permits (30%), complicated permits (30%), unclear regulations (23%) and weather (36%), and they prefer campgrounds (53%). The practical priority is clear, single-source permit and regulation information, safety and connectivity along riding routes, and campground capacity.

Sunset Country: improve coverage to match strong advocacy. Sunset Country visitors give the highest Net Promoter Score (+75) but want better connectivity (39%), and they are the least likely to ride for bonding (45%). The practical priority is connectivity across key riding areas, with positioning built around the riding experience itself.

The Great Canadian Wilderness: build the growing fall market. Visitors are the most likely to be taking more trips than 10 years ago (60%), prefer fall riding (76%) and cite cost least (20%). The practical priority is fall riding packages and events in the region closest to southern markets.



PAST EXPERIENCE

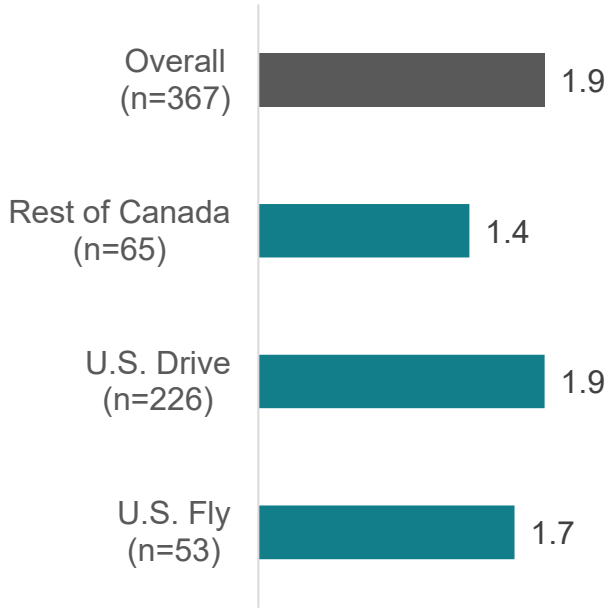
NORTHERN ONTARIO ORVING TRIPS IN THE PAST 5 YEARS

All ORV riders | Traveller types are defined on slide 10

ORV riders have taken an average of 1.9 ORVing trips to Northern Ontario in the past five years.

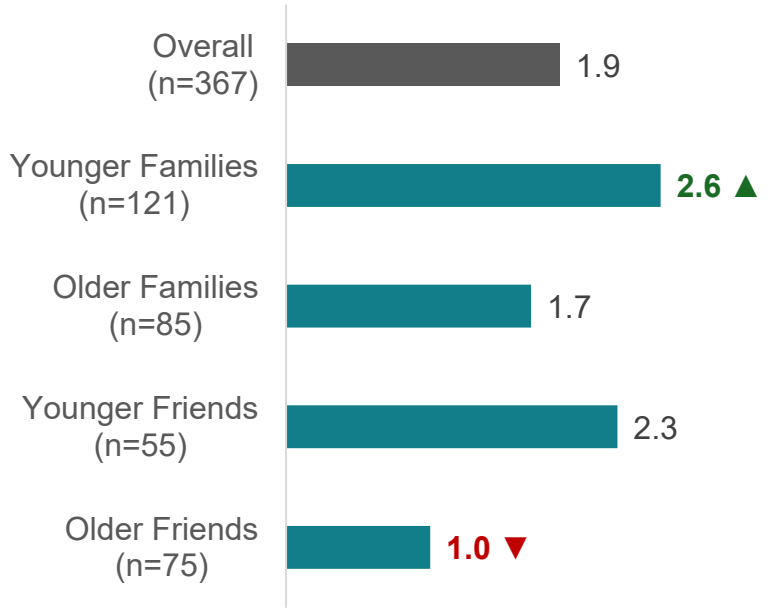
Younger families take more trips than other traveller types (2.6), while older friend groups take fewer (1.0). Among markets, averages range from 1.4 among Rest of Canada riders to 1.9 among U.S. Drive riders, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders (n=367). P1 (AVG) In the past 5 years, how many times have you visited Northern Ontario for an ORVing trip? AVG = average number of trips among all ORV riders, including those who have not visited.

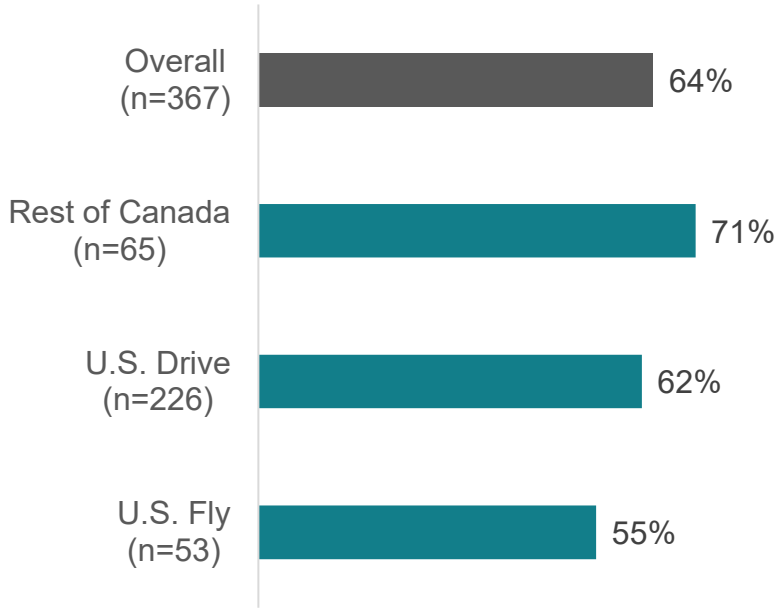
VISITED NORTHERN ONTARIO FOR ORVING IN THE PAST 5 YEARS

All ORV riders | Traveller types are defined on slide 10

Nearly two-thirds of ORV riders (64%) have visited Northern Ontario for an ORVing trip in the past five years.

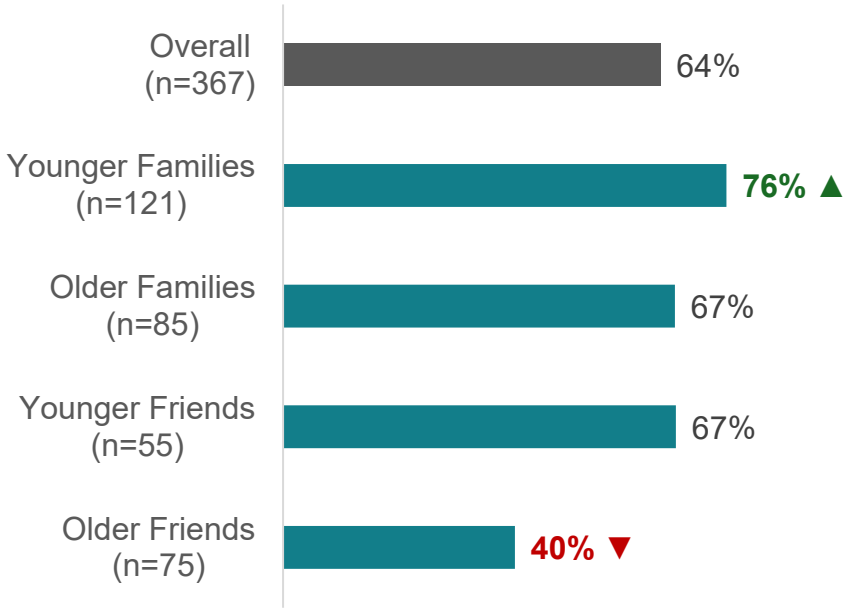
Visits range from 55% among U.S. Fly riders to 71% among Rest of Canada riders. Younger families are more likely than other traveller types to have visited (76%), while older friend groups are less likely (40%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all ORV riders (n=367). P1 (NET: At least once) In the past 5 years, how many times have you visited Northern Ontario for an ORVing trip?
% who have visited at least once shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – MARKET

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

Half of past-five-year visitors (50%) take more ORVing trips in Northern Ontario than they did 10 years ago, 35% take about the same number and 14% take fewer.

Taking more trips ranges from 40% among Rest of Canada visitors to 62% among U.S. Fly visitors. None of the market differences are significant.

Change in trips	Overall (n=236)	Rest of Canada (n=46)	U.S. Drive (n=141)	U.S. Fly* (n=29)
I take more trips than I did 10 years ago	50%	40%	49%	62%
About the same as 10 years ago	35%	28%	38%	35%
I take fewer trips than I did 10 years ago	14%	21%	14%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P1B Compared to 10 years ago, how has your participation in ORVing trips in Northern Ontario changed?

"Not sure" (2%) not shown.

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

CHANGE IN TRIPS VS. 10 YEARS AGO – TRAVELLER TYPE

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

Younger families are the most likely to be taking more trips than 10 years ago (59%), and older friend groups the least likely (17%).

None of the traveller type differences are significant.

Change in trips	Overall (n=236)	Younger Families (n=91)	Older Families (n=57)	Younger Friends (n=37)	Older Friends* (n=30)
I take more trips than I did 10 years ago	50%	59%	52%	50%	17%
About the same as 10 years ago	35%	29%	30%	40%	44%
I take fewer trips than I did 10 years ago	14%	11%	17%	10%	25%

▲ / ▼ 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). P1B Compared to 10 years ago, how has your participation in ORVing trips in Northern Ontario changed?

"Not sure" (2%) not shown.

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

PARTS OF NORTHERN ONTARIO VISITED – MARKET

All ORV riders

About a quarter to three in ten ORV riders have visited each part of Northern Ontario, from 25% for Algoma Country to 30% for the Great Canadian Wilderness and Northeast Ontario.

Rest of Canada riders are the most likely to have visited Superior Country (46%), although market differences are not significant.

Region	Overall (n=367)	Rest of Canada (n=65)	U.S. Drive (n=226)	U.S. Fly (n=53)
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	30%	28%	26%	29%
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	30%	32%	28%	25%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	28%	46%	23%	28%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	26%	26%	24%	29%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	25%	14%	29%	20%

▲ / ▼ Significantly higher / lower than the other markets

Base: all ORV riders (n=367). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. “Not sure” (<1%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to have visited the Great Canadian Wilderness (43%).

Older friend groups are the least likely to have visited each region, from 9% for Algoma Country to 23% for Northeast Ontario.

Region	Overall (n=367)	Younger Families (n=121)	Older Families (n=85)	Younger Friends (n=55)	Older Friends (n=75)
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	30%	43% ▲	28%	25%	14%
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	30%	38%	21%	37%	23%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	28%	33%	39%	22%	12%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	26%	34%	29%	26%	12%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	25%	33%	28%	20%	9%

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

Base: all ORV riders (n=367). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply. “Not sure” (<1%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – MARKET

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

Nearly half of past-five-year visitors (47%) took their most recent Northern Ontario ORVing trip in summer, followed by fall (21%), spring (20%) and winter (12%).

Summer trips are most common among Rest of Canada visitors (61%), although market differences are not significant.

Season	Overall (n=236)	Rest of Canada (n=46)	U.S. Drive (n=141)	U.S. Fly* (n=29)
Winter (December – February)	12%	8%	14%	13%
Spring (March – May)	20%	15%	21%	24%
Summer (June – August)	47%	61%	41%	53%
Fall (September – November)	21%	16%	24%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P3 Thinking about your most recent Northern Ontario trip that involved ORVing, in what season did that trip take place?

"Not sure" (0%) not shown.

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

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – TRAVELLER TYPE

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

Summer is the most common season for the most recent trip in every traveller type, from 45% among younger friend groups to 52% among older families.

Younger friend groups are the most likely to have travelled in winter (20%). None of the traveller type differences are significant.

Season	Overall (n=236)	Younger Families (n=91)	Older Families (n=57)	Younger Friends (n=37)	Older Friends* (n=30)
Winter (December – February)	12%	13%	10%	20%	6%
Spring (March – May)	20%	19%	17%	24%	21%
Summer (June – August)	47%	49%	52%	45%	49%
Fall (September – November)	21%	19%	21%	12%	24%

▲ / ▼ 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). P3 Thinking about your most recent Northern Ontario trip that involved ORVing, in what season did that trip take place?

"Not sure" (0%) not shown.

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

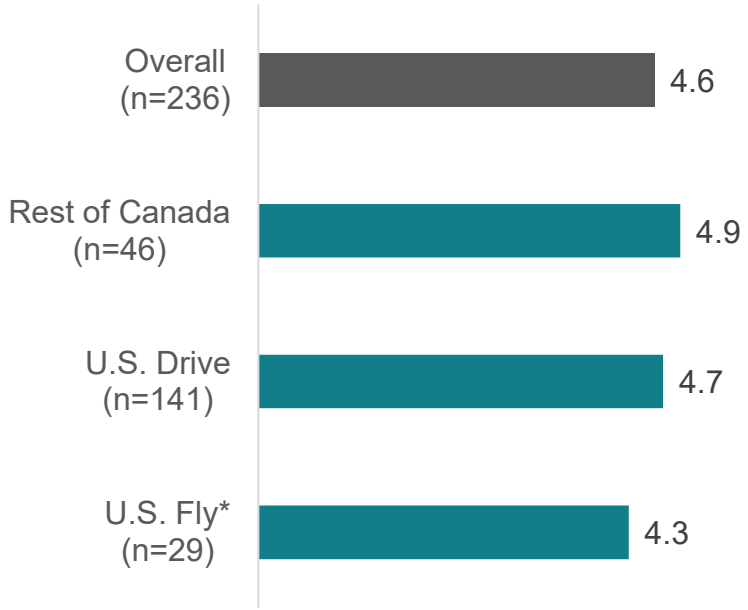
LENGTH OF MOST RECENT NORTHERN ONTARIO TRIP

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

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

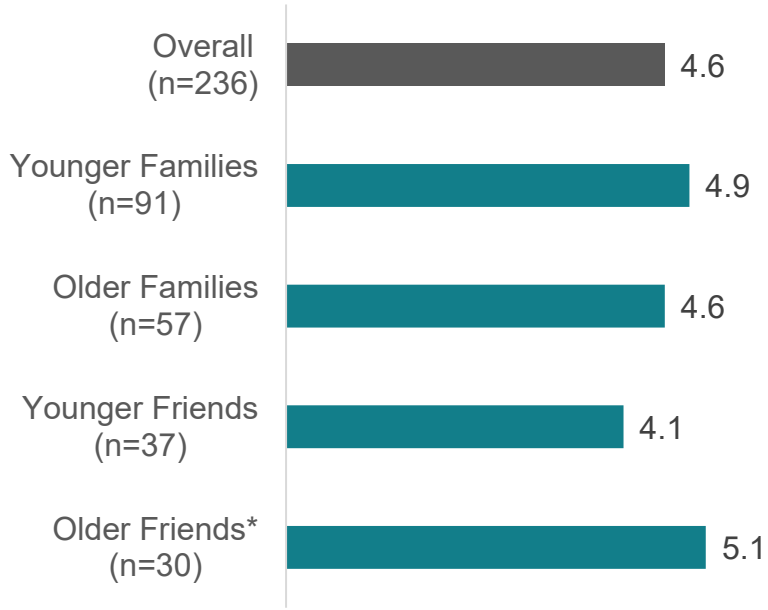
Trip length ranges from 4.3 nights among U.S. Fly visitors to 4.9 among Rest of Canada visitors, and from 4.1 nights among younger friend groups to 5.1 among older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P4 (AVG) Thinking about your most recent Northern Ontario trip that involved ORVing, how long was that trip (total nights away from home)? AVG = average number of nights. *Small base (n<30); interpret with caution.

ACCOMMODATION ON MOST RECENT TRIP – MARKET

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

Designated campgrounds (34%) and short-term rentals (32%) were the most common places to stay on the most recent Northern Ontario ORVing trip, followed by hotels or motels (27%) and backcountry camping (25%).

U.S. Fly visitors are the most likely to have stayed in a hotel or motel (42%) or a drive-in lodge or resort (26%), although their base is small. None of the market differences are significant.

Accommodation	Overall (n=236)	Rest of Canada (n=46)	U.S. Drive (n=141)	U.S. Fly* (n=29)
Designated campground (private or provincial park)	34%	38%	30%	43%
Short-term rental (e.g., AirBnB, Vrbo)	32%	33%	31%	36%
Hotel or motel	27%	16%	29%	42%
Backcountry or wilderness camping	25%	19%	23%	37%
Private cottage (owned or borrowed)	23%	23%	20%	27%
Commercial cottage or cabin rental	19%	16%	19%	23%
Home of friends or relatives (unpaid)	14%	18%	11%	14%
Drive-in lodge or resort	14%	4%	14%	26%
Fly-in or remote outpost camp	8%	2%	8%	17%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P5 Thinking about your most recent Northern Ontario trip that involved ORVing, where did you stay on that trip? Please select all that apply. "Not sure" (0%) not shown.
*Small base (n<30); interpret with caution.

ACCOMMODATION ON MOST RECENT TRIP – TRAVELLER TYPE

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

Younger families are the most likely to have used a short-term rental (40%), and older families a designated campground (44%).

None of the traveller type differences are significant.

Accommodation	Overall (n=236)	Younger Families (n=91)	Older Families (n=57)	Younger Friends (n=37)	Older Friends* (n=30)
Designated campground (private or provincial park)	34%	30%	44%	28%	40%
Short-term rental (e.g., AirBnB, Vrbo)	32%	40%	29%	31%	8%
Hotel or motel	27%	28%	29%	26%	22%
Backcountry or wilderness camping	25%	28%	24%	25%	13%
Private cottage (owned or borrowed)	23%	29%	15%	19%	21%
Commercial cottage or cabin rental	19%	25%	11%	19%	6%
Home of friends or relatives (unpaid)	14%	14%	11%	15%	19%
Drive-in lodge or resort	14%	16%	18%	12%	5%
Fly-in or remote outpost camp	8%	11%	10%	5%	0%

▲ / ▼ 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). P5 Thinking about your most recent Northern Ontario trip that involved ORVing, where did you stay on that trip? Please select all that apply.
"Not sure" (0%) not shown.
*Small base (n<30); interpret with caution.

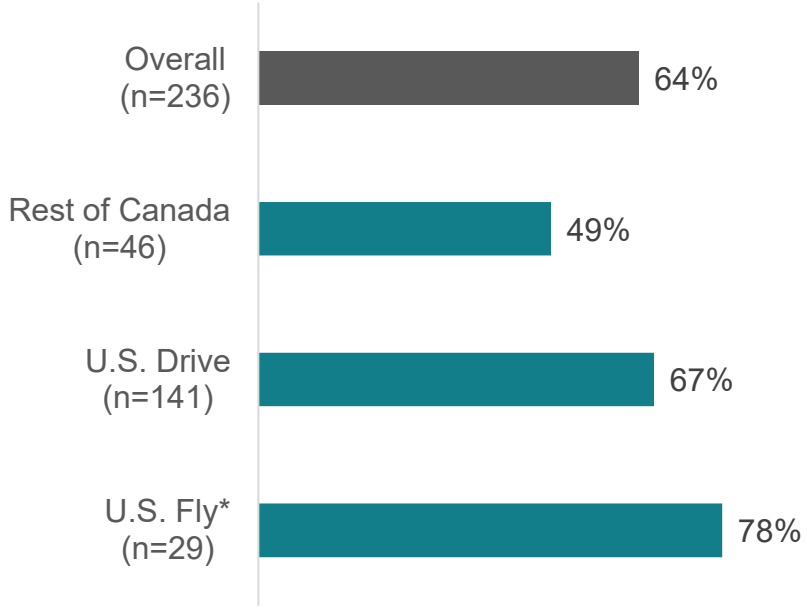
HIGH-YIELD VISITORS

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

Two-thirds of past-five-year visitors (64%) stayed in paid roofed lodging on their most recent Northern Ontario trip, making them high-yield visitors.

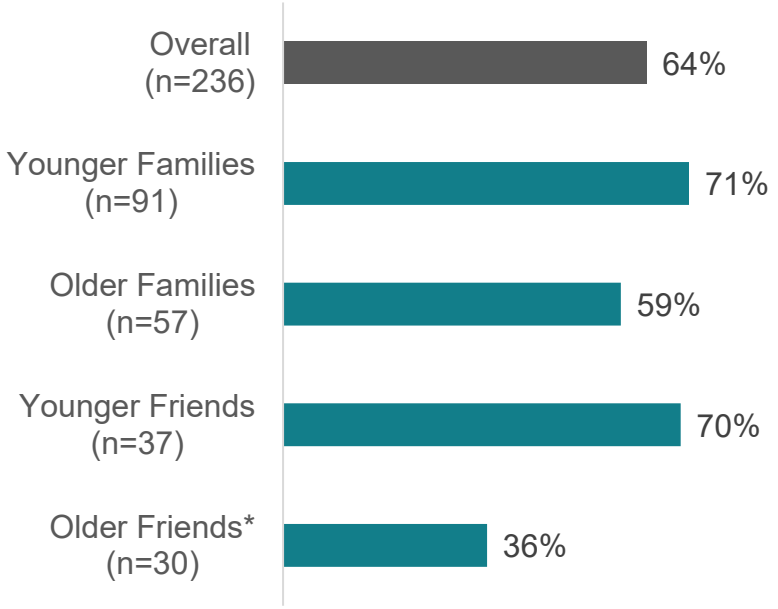
High-yield stays range from 49% among Rest of Canada visitors to 78% among U.S. Fly visitors, and from 36% among older friend groups to 71% among younger families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P5_HY Thinking about your most recent Northern Ontario trip that involved ORVing, where did you stay on that trip? Please select all that apply. High-yield = stayed in a drive-in lodge or resort, fly-in or remote outpost camp, commercial cottage or cabin rental, hotel or motel, or short-term rental (P5 codes 1–5). *Small base (n<30); interpret with caution

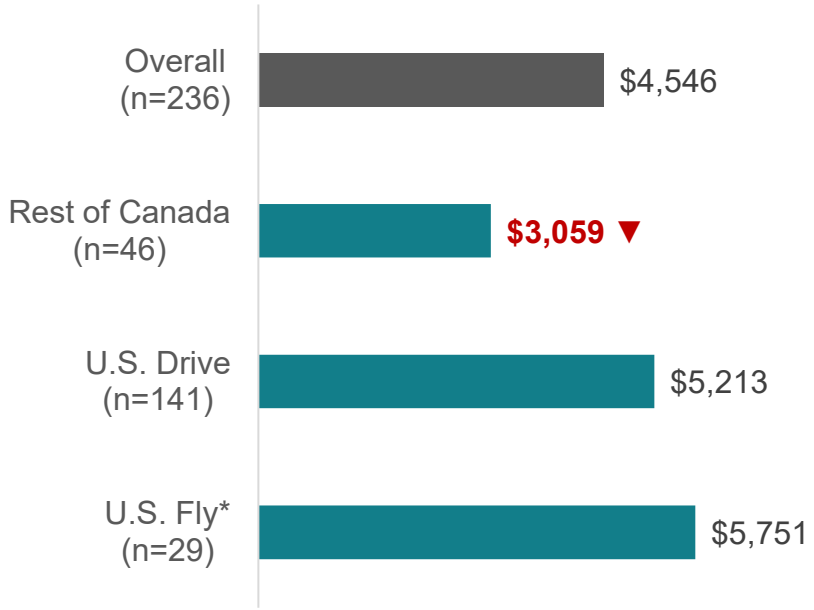
TRAVEL PARTY SPEND ON MOST RECENT NORTHERN ONTARIO TRIP

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

Travel parties spent an average of $4,546 on their most recent Northern Ontario ORVing trip.

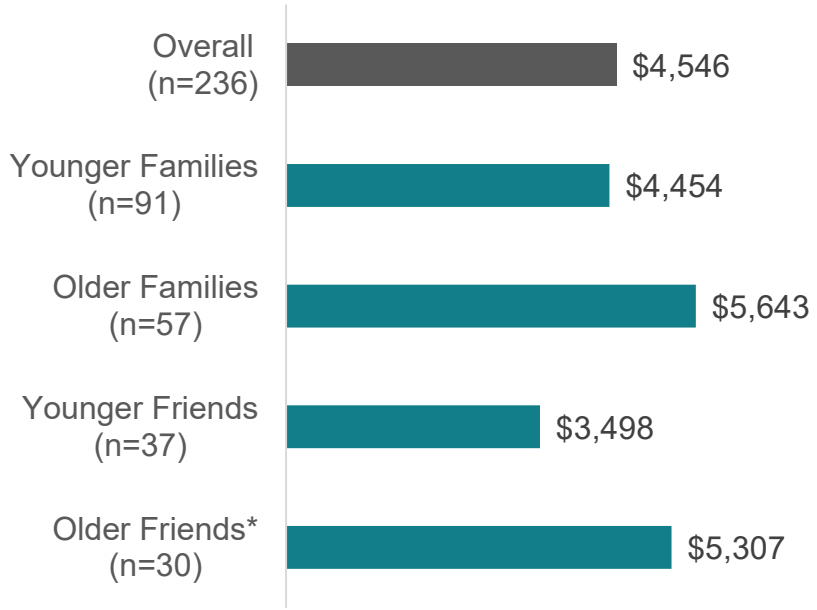
Rest of Canada visitors spent less than other markets ($3,059). Among traveller types, spending ranges from $3,498 among younger friend groups to $5,643 among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P6 (CAD) Approximately how much did your travel party spend in total on that Northern Ontario trip? Average total travel party spend in Canadian dollars; U.S. responses converted at 1.37. *Small base (n<30); interpret with caution.

SERVICES USED ON MOST RECENT TRIP – MARKET

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

Six in ten past-five-year visitors (60%) bought a trail pass or paid a day-use fee on their most recent trip, and about four in ten used equipment or gear rental (42%), a local outfitter or guide (40%) or a packaged experience (36%). Only 11% used none of these.

Use of rentals, outfitters and packaged experiences is highest among U.S. Fly visitors and lowest among Rest of Canada visitors, although market differences are not significant.

Service	Overall (n=236)	Rest of Canada (n=46)	U.S. Drive (n=141)	U.S. Fly* (n=29)
Trail pass or day-use fee purchase	60%	63%	59%	61%
Equipment or gear rental	42%	23%	43%	72%
Local outfitter or guide service	40%	28%	41%	54%
Packaged experience (e.g., guided ORVing package with accommodation, American Plan)	36%	16%	40%	58%
Charter or float plane	13%	2%	15%	20%
None of the above	11%	23%	6%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

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

SERVICES USED ON MOST RECENT TRIP – TRAVELLER TYPE

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

Older families are the most likely to have bought a trail pass or paid a day-use fee (68%), and younger families to have used a packaged experience (48%).

Older friend groups are the most likely to have used none of these services (26%). None of the traveller type differences are significant.

Service	Overall (n=236)	Younger Families (n=91)	Older Families (n=57)	Younger Friends (n=37)	Older Friends* (n=30)
Trail pass or day-use fee purchase	60%	60%	68%	54%	55%
Equipment or gear rental	42%	48%	39%	47%	26%
Local outfitter or guide service	40%	45%	30%	40%	40%
Packaged experience (e.g., guided ORVing package with accommodation, American Plan)	36%	48%	32%	34%	22%
Charter or float plane	13%	19%	11%	15%	0%
None of the above	11%	8%	7%	5%	26%

▲ / ▼ 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). P7A Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

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

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – MARKET

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

For nine in ten past-five-year visitors, Northern Ontario was the primary and only destination (49%) or the main destination with brief stops elsewhere (42%) of their most recent ORVing trip.

Rest of Canada visitors are more likely than other markets to say it was a secondary stop on a trip focused elsewhere (5%).

Role of Northern Ontario	Overall (n=236)	Rest of Canada (n=46)	U.S. Drive (n=141)	U.S. Fly* (n=29)
Northern Ontario was our primary and only destination	49%	34%	50%	49%
Northern Ontario was the main destination, with brief stops elsewhere	42%	55%	41%	40%
Northern Ontario was one of several equal destinations on the trip	8%	2%	10%	11%
Northern Ontario was a secondary stop on a trip focused elsewhere	1%	5% ▲	0%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years (n=236). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (1%) not shown.

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

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – TRAVELLER TYPE

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 say Northern Ontario was their primary and only destination (55%).

None of the traveller type differences are significant.

Role of Northern Ontario	Overall (n=236)	Younger Families (n=91)	Older Families (n=57)	Younger Friends (n=37)	Older Friends* (n=30)
Northern Ontario was our primary and only destination	49%	48%	45%	52%	55%
Northern Ontario was the main destination, with brief stops elsewhere	42%	41%	47%	38%	34%
Northern Ontario was one of several equal destinations on the trip	8%	10%	5%	11%	5%
Northern Ontario was a secondary stop on a trip focused elsewhere	1%	1%	3%	0%	0%

▲ / ▼ 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). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (1%) not shown.

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

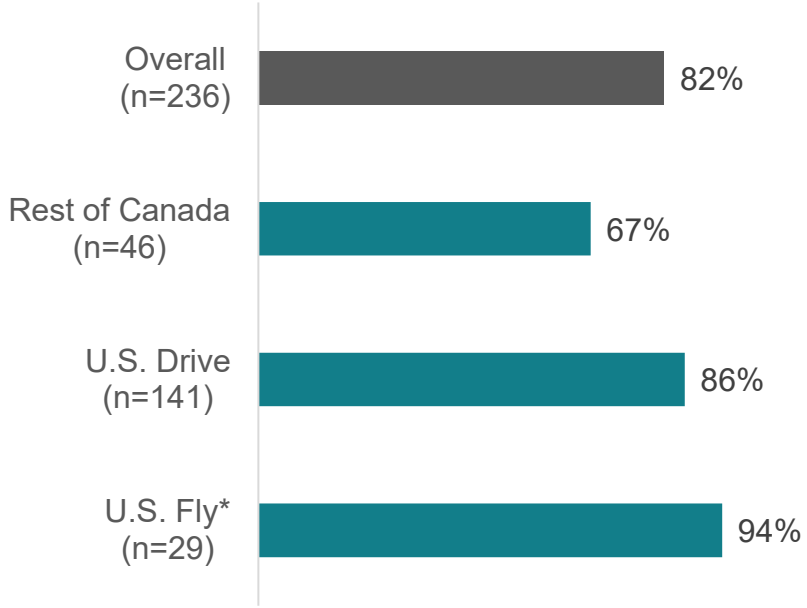
RATING OF MOST RECENT NORTHERN ONTARIO EXPERIENCE

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

More than eight in ten past-five-year visitors (82%) rate their most recent Northern Ontario ORVing experience as somewhat or much better than trips taken elsewhere, including half (50%) who rate it much better.

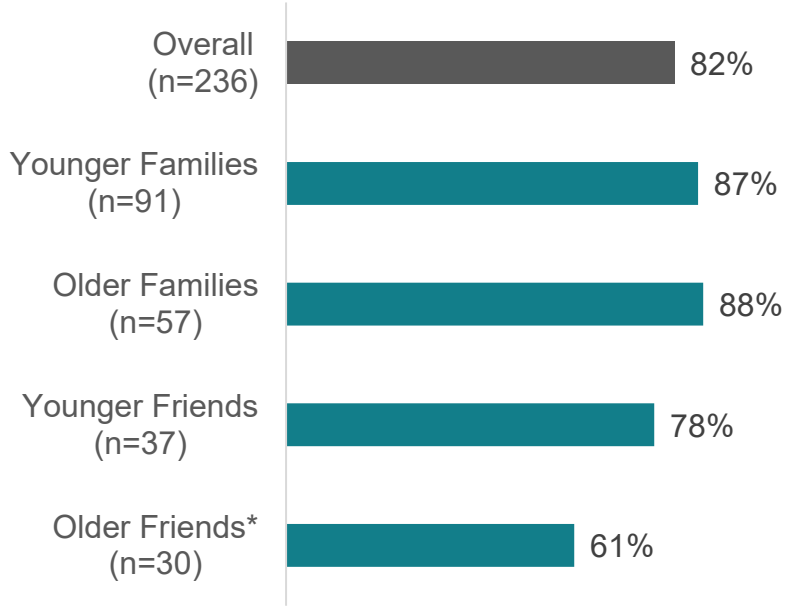
Ratings range from 67% among Rest of Canada visitors to 86% among U.S. Drive visitors, and from 61% among older friend groups to 88% among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: ORV riders who have visited Northern Ontario for ORVing in the past 5 years, excluding “Don’t know” (n=236). P8 (TOP2) Compared to ORVing trips you have taken elsewhere, how would you rate your most recent Northern Ontario experience overall? TOP2 = % somewhat or much better. *Small base (n<30); interpret with caution.



PAST VISITORS VS. OVERALL

PAST VISITORS: ORVING AS PART OF IDENTITY – MARKET

All ORV riders

Nine in ten past visitors (90%) agree that ORVing and ORV culture is a central part of who they are, compared with 80% of ORV riders overall.

U.S. Drive visitors agree more than their market overall (94% vs. 84%).

Response	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
TOP2: Somewhat agree + Strongly agree	80%	66%	84%	85%
	90% ▲	82%	94% ▲	98%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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."
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: ORVING AS PART OF IDENTITY – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Past visitors agree more than ORV riders overall that ORVing is a central part of who they are (90% vs. 80%).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Response	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
TOP2: Somewhat agree + Strongly agree	80%	87%	77%	88%	65%
	90% ▲	91%	90%	93%	79%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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."
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: LIKELIHOOD TO RECOMMEND (NPS) – MARKET

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

Past visitors give Northern Ontario an NPS of 59, above the 43 among all ORV riders who know the region.

U.S. Drive visitors are more positive than their market overall (58 vs. 45).

Measure	Overall (n=297 / 231)	Rest of Canada (n=56 / 44)	U.S. Drive (n=176 / 139)	U.S. Fly* (n=46 / 29)
NPS score	43	45	45	36
	59 ▲	54	58 ▲	74

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

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

Base: ORV riders who know a lot or a little about Northern Ontario (n=297; past visitors n=231). 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).
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

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

Past visitors give Northern Ontario a higher NPS than ORV riders overall (59 vs. 43).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Measure	Overall (n=297 / 231)	Younger Families (n=104 / 90)	Older Families (n=69 / 56)	Younger Friends (n=44 / 36)	Older Friends* (n=57 / 28)
NPS score	43	48	51	38	27
	59 ▲	58	62	54	64

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

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

Base: ORV riders who know a lot or a little about Northern Ontario (n=297; past visitors n=231). 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).
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders

Almost all past visitors (96%) are likely to visit Northern Ontario for ORVing in the next two years, compared with 77% of ORV riders overall.

U.S. Drive visitors are more likely than their market overall to return (97% vs. 81%).

Response	Overall (n=364 / 235)	Rest of Canada (n=64 / 45)	U.S. Drive (n=224 / 141)	U.S. Fly* (n=53 / 29)
TOP2: Somewhat likely + Very likely	77%	72%	81%	61%
	96% ▲	92%	97% ▲	98%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders, excluding “Don’t know” (n=364; past visitors n=235). N4 (TOP2) How likely are you to visit Northern Ontario for an ORVing trip in the next 2 years?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely than ORV riders overall to visit in the next two years (96% vs. 77%), and nine in ten or more visitors in every traveller type say so.

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Response	Overall (n=364 / 235)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=54 / 36)	Older Friends* (n=74 / 30)
TOP2: Somewhat likely + Very likely	77%	86%	73%	80%	61%
	96% ▲	96%	96%	98%	90%

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

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

Base: all ORV riders, excluding “Don’t know” (n=364; past visitors n=235). N4 (TOP2) How likely are you to visit Northern Ontario for an ORVing trip in the next 2 years?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (1 OF 7)

All ORV riders

Past visitors are less likely than ORV riders overall to be discouraged by expensive licensing or permit requirements (22% vs. 30%), while cost, wildfires and weather are cited at similar rates.

U.S. Drive visitors are less likely than their market overall to cite expensive licensing requirements (19% vs. 28%).

Barrier	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Cost	31%	39%	29%	35%
	29%	44%	26%	19%
Expensive licensing, registration, or permit requirements	30%	37%	28%	31%
	22% ▼	39%	19% ▼	16%
Wildfires, flooding, or other environmental disruptions	29%	34%	26%	27%
	26%	35%	22%	22%
Unfavourable weather or season timing	28%	38%	28%	23%
	26%	36%	26%	21%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: BARRIERS – MARKET (2 OF 7)

All ORV riders

Past visitors are less likely to be discouraged by poor value for money (19% vs. 27%).

U.S. Drive visitors are less likely than their market overall to cite poor value for money (12% vs. 21%).

Barrier	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
High transportation costs (gas, airfare)	28%	43%	24%	28%
	23%	36%	20%	19%
Poor value for money	27%	44%	21%	31%
	19% ▼	38%	12% ▼	16%
Concerns about safety	27%	29%	29%	20%
	27%	34%	27%	21%
Poor road, trail, or water access	27%	30%	25%	35%
	23%	35%	20%	27%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (3 OF 7)

All ORV riders

Past visitors are less likely to be discouraged by unfamiliar or unclear regulations (16% vs. 23%).

U.S. Drive visitors are less likely than their market overall to cite unclear regulations (11% vs. 20%). Among U.S. riders, anti-American sentiment is cited by 23% of U.S. Drive visitors; significance is not shown for this U.S.-only item.

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

Barrier	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Complicated licensing, registration, or permit requirements	25%	35%	23%	27%
	22%	44%	18%	15%
Unfamiliar or unclear regulations	23%	35%	20%	23%
	16% ▼	35%	11% ▼	15%
Poor trail grooming or maintenance	20%	14%	22%	18%
	16%	12%	17%	16%
Anti-American sentiment	20%	–	27%	21%
	15%	–	23%	12%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (4 OF 7)

All ORV riders

Past visitors are less likely to say Northern Ontario is too far to drive (12% vs. 18%) or to cite vehicle registration or insurance requirements (12% vs. 17%).

U.S. Drive visitors are less likely than their market overall to cite distance (8% vs. 14%), limited accommodation (7% vs. 15%) and vehicle registration requirements (9% vs. 15%).

Barrier	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Too far to drive	18%	29%	14%	26%
	12% ▼	26%	8% ▼	11%
Limited accommodation options	18%	27%	15%	21%
	14%	33%	7% ▼	25%
Poor or unreliable cell phone or internet connectivity	17%	11%	17%	22%
	14%	13%	14%	18%
Vehicle registration or insurance requirements across jurisdictions	17%	17%	15%	25%
	12% ▼	22%	9% ▼	10%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (5 OF 7)

All ORV riders

Past visitors are less likely to be discouraged by a lack of amenities or services (11% vs. 15%).

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

Barrier	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Difficulty finding reliable trip planning information	16%	30%	15%	8%
	15%	35%	10%	9%
Lack of amenities or services at the destination	15%	18%	14%	17%
	11% ▼	15%	9%	15%
Concerns about crossing the Canada-US border	15%	–	18%	23%
	12%	–	17%	18%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (6 OF 7)

All ORV riders

Insects, campsite availability and storage are each cited by fewer than one in five past visitors.

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

Barrier	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Insects (e.g., blackflies, mosquitoes)	14%	37%	8%	10%
	16%	34%	10%	14%
Availability of campsites or RV sites	13%	16%	10%	20%
	14%	15%	12%	14%
Lack of secure equipment or vehicle storage	12%	13%	12%	17%
	11%	17%	9%	18%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – MARKET (7 OF 7)

All ORV riders

Very few past visitors say they do not know enough about Northern Ontario's ORVing opportunities (2% vs. 11% of ORV riders overall).

This is lower among U.S. Drive visitors than the market overall (1% vs. 7%).

Barrier	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
I do not know enough about Northern Ontario's ORVing opportunities	11%	21%	7%	14%
	2% ▼	2%	1% ▼	4%
Too remote or rugged for my comfort level	10%	6%	9%	14%
	9%	9%	7%	18%
Not sure the ORVing quality would meet my expectations	6%	11%	5%	7%
	3%	4%	4%	2%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (1 OF 7)

All ORV riders | Traveller types are defined on slide 10

Past visitors are less likely than ORV riders overall to be discouraged by expensive licensing or permit requirements (22% vs. 30%).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Barrier	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Cost	31%	31%	34%	30%	31%
	29%	28%	29%	27%	37%
Expensive licensing, registration, or permit requirements	30%	28%	37%	15%	44%
	22% ▼	22%	30%	10%	30%
Wildfires, flooding, or other environmental disruptions	29%	28%	41%	19%	31%
	26%	26%	43%	14%	15%
Unfavourable weather or season timing	28%	24%	35%	27%	29%
	26%	23%	38%	23%	19%

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

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: BARRIERS – TRAVELLER TYPE (2 OF 7)

All ORV riders | Traveller types are defined on slide 10

Past visitors are less likely to be discouraged by poor value for money (19% vs. 27%).

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

Barrier	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
High transportation costs (gas, airfare)	28%	30%	32%	21%	31%
	23%	26%	28%	12%	20%
Poor value for money	27%	24%	25%	13%	50%
	19% ▼	18%	22%	9%	22%
Concerns about safety	27%	20%	30%	25%	40%
	27%	20%	37%	26%	37%
Poor road, trail, or water access	27%	25%	32%	22%	37%
	23%	23%	32%	15%	31%

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

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (3 OF 7)

All ORV riders | Traveller types are defined on slide 10

Past visitors are less likely to be discouraged by unfamiliar or unclear regulations (16% vs. 23%).

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

Barrier	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Complicated licensing, registration, or permit requirements	25%	27%	27%	12%	28%
	22%	23%	29%	11%	21%
Unfamiliar or unclear regulations	23%	20%	29%	19%	32%
	16% ▼	14%	28%	15%	8%
Poor trail grooming or maintenance	20%	21%	17%	18%	27%
	16%	21%	14%	14%	8%
Anti-American sentiment	20%	22%	21%	10%	23%
	15%	20%	16%	10%	6%

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

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: BARRIERS – TRAVELLER TYPE (4 OF 7)

All ORV riders | Traveller types are defined on slide 10

Past visitors are less likely to cite distance (12% vs. 18%) or vehicle registration requirements (12% vs. 17%).

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

Barrier	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Too far to drive	18%	18%	15%	16%	24%
	12% ▼	16%	6%	12%	16%
Limited accommodation options	18%	17%	19%	12%	24%
	14%	15%	21%	10%	4%
Poor or unreliable cell phone or internet connectivity	17%	16%	21%	18%	17%
	14%	14%	17%	19%	11%
Vehicle registration or insurance requirements across jurisdictions	17%	15%	24%	14%	19%
	12% ▼	10%	22%	7%	6%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (5 OF 7)

All ORV riders | Traveller types are defined on slide 10

Past visitors are less likely to be discouraged by a lack of amenities or services (11% vs. 15%).

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

Barrier	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Difficulty finding reliable trip planning information	16%	15%	20%	12%	18%
	15%	14%	21%	14%	8%
Lack of amenities or services at the destination	15%	19%	7%	12%	20%
	11% ▼	15%	8%	10%	8%
Concerns about crossing the Canada-US border	15%	16%	18%	11%	15%
	12%	13%	18%	12%	6%

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

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (6 OF 7)

All ORV riders | Traveller types are defined on slide 10

Insects, campsite availability and storage are each cited by fewer than one in five past visitors.

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

Barrier	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Insects (e.g., blackflies, mosquitoes)	14%	19%	12%	18%	6%
	16%	23%	8%	16%	3%
Availability of campsites or RV sites	13%	12%	16%	10%	18%
	14%	14%	15%	13%	13%
Lack of secure equipment or vehicle storage	12%	15%	7%	16%	15%
	11%	13%	6%	19%	11%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: BARRIERS – TRAVELLER TYPE (7 OF 7)

All ORV riders | Traveller types are defined on slide 10

Very few past visitors say they do not know enough about Northern Ontario's ORVing opportunities (2% vs. 11%).

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

Barrier	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
I do not know enough about Northern Ontario's ORVing opportunities	11%	7%	11%	15%	16%
	2% ▼	2%	4%	4%	0%
Too remote or rugged for my comfort level	10%	10%	12%	12%	7%
	9%	10%	10%	13%	4%
Not sure the ORVing quality would meet my expectations	6%	6%	3%	7%	9%
	3%	5%	3%	5%	0%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: INDEPENDENT VS. GUIDED ORVING – MARKET

All ORV riders

Half of past visitors (50%) use a mix of guided and self-guided experiences, compared with 40% of ORV riders overall, and fewer go fully self-guided (48% vs. 57%).

U.S. Drive visitors show the same shift compared with their market overall (56% vs. 44% using a mix).

Approach	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
I mainly go on my own or with my own group – fully self-guided	57%	75%	53%	53%
	48% ▼	71%	42% ▼	35%
I use a mix of guided and self-guided	40%	23%	44%	45%
	50% ▲	29%	56% ▲	62%
I mainly use guided or outfitted experiences provided by operators	2%	1%	3%	2%
	2%	0%	2%	3%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). T6 When you go on an ORVing trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (0%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: INDEPENDENT VS. GUIDED ORVING – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely than ORV riders overall to use a mix of guided and self-guided experiences (50% vs. 40%).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Approach	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
I mainly go on my own or with my own group – fully self-guided	57%	51%	60%	54%	65%
	48% ▼	47%	44%	44%	47%
I use a mix of guided and self-guided	40%	45%	39%	44%	35%
	50% ▲	50%	54%	54%	53%
I mainly use guided or outfitted experiences provided by operators	2%	3%	1%	1%	0%
	2%	3%	1%	2%	0%

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

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

Base: all ORV riders (n=367; past visitors n=236). T6 When you go on an ORVing trip, do you mainly go independently or use guided/outfitted experiences?
"Not sure" (0%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: USE OF CERTIFIED ROUTES OR PASSES – MARKET

All ORV riders

Two-thirds of past visitors (64%) have used an established or certified touring route, trail pass network or passport program, compared with half of ORV riders overall (51%).

U.S. Drive visitors are more likely than their market overall to have used one (68% vs. 55%).

Response	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Yes	51%	38%	55%	51%
	64% ▲	48%	68% ▲	74%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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?
"No" and "Not sure" not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

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

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely than ORV riders overall to have used a certified route, trail pass network or passport program (64% vs. 51%).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Response	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Yes	51%	60%	44%	58%	32%
	64% ▲	68%	56%	69%	48%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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?
"No" and "Not sure" not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – MARKET

All ORV riders

Two-thirds of past visitors (67%) are likely to use AI tools to plan their next ORVing trip, compared with 61% of ORV riders overall.

Within each market, differences between visitors and the market overall are not significant on these ratings; the U.S. Fly visitor base is small.

Response	Overall (n=364 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=224 / 141)	U.S. Fly* (n=53 / 29)
TOP2: Somewhat likely + Very likely	61%	43%	62%	70%
	67% ▲	47%	68%	87%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders, excluding “Don’t know” (n=364; past visitors n=236). 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?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely than ORV riders overall to use AI tools to plan their next trip (67% vs. 61%).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Response	Overall (n=364 / 236)	Younger Families (n=120 / 91)	Older Families (n=84 / 57)	Younger Friends (n=54 / 37)	Older Friends* (n=75 / 30)
TOP2: Somewhat likely + Very likely	61%	74%	50%	68%	49%
	67% ▲	76%	54%	76%	51%

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

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

Base: all ORV riders, excluding “Don’t know” (n=364; past visitors n=236). 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?
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: YEARS ORVING – MARKET

All ORV riders

Past visitors are more likely than ORV riders overall to have been ORVing for 6 to 10 years (43% vs. 33%) and less likely for more than 10 years (29% vs. 39%).

U.S. Drive visitors show the same pattern compared with their market overall (50% vs. 37% for 6 to 10 years; 27% vs. 37% for more than 10 years).

Years ORVing	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Less than 2 years	5%	7%	4%	4%
	3%	0%	4%	4%
2 to 5 years	24%	18%	21%	26%
	25%	19%	19%	36%
6 to 10 years	33%	26%	37%	28%
	43% ▲	29%	50% ▲	44%
More than 10 years	39%	50%	37%	42%
	29% ▼	53%	27% ▼	16%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). A1 How many years have you been ORVing as a hobby or recreational pursuit?

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

PAST VISITORS: YEARS ORVING – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely than ORV riders overall to have been ORVing for 6 to 10 years (43% vs. 33%).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Years ORVing	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Less than 2 years	5%	3%	9%	6%	1%
	3%	2%	4%	6%	0%
2 to 5 years	24%	28%	14%	22%	23%
	25%	30%	17%	23%	23%
6 to 10 years	33%	36%	32%	43%	21%
	43% ▲	43%	47%	50%	33%
More than 10 years	39%	32%	44%	29%	55%
	29% ▼	25%	33%	21%	44%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). A1 How many years have you been ORVing as a hobby or recreational pursuit?

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

PAST VISITORS: NIGHTS PER ORVING TRIP – MARKET

All ORV riders

Past visitors take longer ORVing trips than ORV riders overall, averaging 4.3 nights compared with 3.8.

U.S. Drive visitors take longer trips than their market overall (4.5 vs. 4.0 nights).

Measure	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Average number of nights per ORVing trip	3.8	3.5	4.0	3.4
	4.3 ▲	3.8	4.5 ▲	4.1

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). A4 (AVG) How many nights do you typically spend on an ORVing trip?
AVG = average number of nights.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: NIGHTS PER ORVING TRIP – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Past visitors take longer ORVing trips than ORV riders overall (4.3 vs. 3.8 nights).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Measure	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Average number of nights per ORVing trip	3.8	4.1	3.6	4.2	3.1
	4.3 ▲	4.4	4.0	4.5	4.0

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). A4 (AVG) How many nights do you typically spend on an ORVing trip?
AVG = average number of nights.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GETTING TO DESTINATIONS – MARKET

All ORV riders

Past visitors are more likely than ORV riders overall to fly to a regional hub and then drive (22% vs. 16%) or take a float plane or charter flight (13% vs. 8%).

U.S. Drive visitors are more likely than their market overall to use both (24% vs. 16% and 13% vs. 8%).

Mode of travel	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Personal vehicle (car, truck, SUV)	68%	63%	70%	66%
	68%	61%	68%	74%
Personal vehicle with trailer (e.g., boat, camper, ATV)	68%	67%	66%	79%
	70%	71%	69%	77%
RV / motorhome	19%	8%	22%	23%
	23%	10%	26%	32%
Fly to a regional hub, then drive	16%	15%	16%	19%
	22% ▲	14%	24% ▲	26%
Float plane or charter flight to a remote destination	8%	1%	8%	11%
	13% ▲	2%	13% ▲	20%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). T3 How do you typically get to your ORVing destinations? Please select all that apply.
"Not sure" (<1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: GETTING TO DESTINATIONS – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely than ORV riders overall to fly to a regional hub (22% vs. 16%) or take a float plane or charter flight (13% vs. 8%).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Mode of travel	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Personal vehicle (car, truck, SUV)	68%	70%	67%	74%	61%
	68%	70%	70%	72%	56%
Personal vehicle with trailer (e.g., boat, camper, ATV)	68%	76%	72%	57%	67%
	70%	76%	75%	53%	72%
RV / motorhome	19%	24%	17%	18%	16%
	23%	28%	22%	15%	15%
Fly to a regional hub, then drive	16%	25%	6%	19%	13%
	22% ▲	31%	9%	25%	14%
Float plane or charter flight to a remote destination	8%	12%	10%	2%	2%
	13% ▲	16%	15%	3%	4%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). T3 How do you typically get to your ORVing destinations? Please select all that apply.
"Not sure" (<1%) not shown.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: PREFERRED ACCESS – MARKET

All ORV riders

Road-accessible areas remain the preference for nine in ten past visitors (87%), but visitors are more open than ORV riders overall to train-in (32% vs. 25%) and fly-in or float plane access (25% vs. 20%).

U.S. Drive visitors are more likely than their market overall to prefer train-in access (30% vs. 23%).

Access type	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Road-accessible areas	89%	92%	89%	87%
	87%	91%	87%	86%
Remote boat-in access	25%	13%	28%	30%
	28%	9%	33%	42%
Train-in access	25%	18%	23%	34%
	32% ▲	24%	30% ▲	44%
Fly-in or float plane access	20%	7%	22%	31%
	25% ▲	10%	28%	45%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

PAST VISITORS: PREFERRED ACCESS – TRAVELLER TYPE

All ORV riders | Traveller types are defined on slide 10

Past visitors are more open than ORV riders overall to train-in (32% vs. 25%) and fly-in or float plane access (25% vs. 20%).

Within each traveller type, differences between visitors and the group overall are not significant; the older friend group visitor base is small.

Access type	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Road-accessible areas	89%	87%	93%	82%	96%
	87%	87%	90%	80%	96%
Remote boat-in access	25%	33%	18%	19%	25%
	28%	37%	20%	19%	29%
Train-in access	25%	31%	31%	28%	6%
	32% ▲	35%	40%	32%	4%
Fly-in or float plane access	20%	28%	14%	28%	9%
	25% ▲	32%	19%	35%	7%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders

Past visitors are more likely than ORV riders overall to consider British Columbia (35% vs. 29%), while U.S. destinations such as Michigan and Colorado are considered at similar rates.

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

Destination	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Michigan	30%	–	42%	31%
	24%	–	35%	27%
Colorado	30%	–	32%	68%
	26%	–	32%	53%
British Columbia	29%	66%	16%	36%
	35% ▲	76%	21%	37%
Wisconsin	22%	–	30%	27%
	16%	–	21%	27%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders

Past visitors are more likely to consider Quebec (25% vs. 20%).

U.S. Drive visitors are more likely than their market overall to consider Quebec (24% vs. 17%).

Destination	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Pennsylvania	22%	–	33%	10%
	21%	–	32%	18%
Alberta	21%	59%	11%	17%
	25%	64%	15%	18%
Quebec	20%	17%	17%	23%
	25% ▲	8%	24% ▲	41%
Texas	18%	–	20%	43%
	17%	–	19%	42%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders

Past visitors are more likely to consider somewhere else in Ontario (24% vs. 18%).

U.S. Drive visitors are more likely than their market overall to consider somewhere else in Ontario (24% vs. 18%).

Destination	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Somewhere else in Ontario	18%	17%	18%	9%
	24% ▲	24%	24% ▲	17%
Minnesota	17%	–	21%	26%
	16%	–	21%	27%
California	16%	–	16%	39%
	16%	–	18%	48%
New York	15%	–	22%	11%
	16%	–	23%	16%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders

Past visitors are more likely to consider Manitoba (16% vs. 12%).

Significance is not shown for the U.S.-only destinations on this slide.

Destination	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Ohio	15%	–	22%	8%
	15%	–	21%	15%
Saskatchewan	13%	25%	9%	16%
	17%	29%	10%	26%
Manitoba	12%	21%	7%	11%
	16% ▲	30%	9%	20%
Indiana	11%	–	16%	11%
	11%	–	15%	19%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders

Few past visitors name another destination (2% vs. 4%).

Significance is not shown for the U.S.-only destinations on this slide.

Destination	Overall (n=367 / 236)	Rest of Canada (n=65 / 46)	U.S. Drive (n=226 / 141)	U.S. Fly* (n=53 / 29)
Illinois	10%	–	15%	5%
	12%	–	18%	9%
New Jersey	10%	–	14%	10%
	10%	–	13%	17%
Other	4%	6%	3%	0%
	2% ▼	0%	0% ▼	0%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely than ORV riders overall to consider British Columbia (35% vs. 29%).

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

Destination	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Michigan	30%	31%	29%	24%	39%
	24%	25%	30%	21%	24%
Colorado	30%	33%	28%	24%	34%
	26%	27%	32%	18%	23%
British Columbia	29%	34%	29%	25%	28%
	35% ▲	40%	36%	19%	43%
Wisconsin	22%	21%	22%	15%	28%
	16%	15%	23%	7%	8%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely to consider Quebec (25% vs. 20%).

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

Destination	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Pennsylvania	22%	24%	28%	17%	13%
	21%	25%	28%	15%	15%
Alberta	21%	24%	26%	20%	15%
	25%	27%	32%	19%	20%
Quebec	20%	23%	19%	29%	6%
	25% ▲	27%	20%	27%	15%
Texas	18%	28%	7%	16%	22%
	17%	24%	9%	19%	18%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely to consider somewhere else in Ontario (24% vs. 18%).

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

Destination	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Somewhere else in Ontario	18%	27%	12%	17%	9%
	24% ▲	34%	16%	23%	7%
Minnesota	17%	23%	9%	20%	16%
	16%	21%	13%	16%	12%
California	16%	24%	10%	21%	12%
	16%	24%	13%	20%	9%
New York	15%	18%	19%	14%	8%
	16%	18%	21%	12%	7%

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

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders | Traveller types are defined on slide 10

Past visitors are more likely to consider Manitoba (16% vs. 12%).

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

Destination	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Ohio	15%	17%	11%	15%	19%
	15%	16%	7%	14%	35%
Saskatchewan	13%	17%	14%	7%	8%
	17%	21%	13%	9%	14%
Manitoba	12%	17%	9%	6%	8%
	16% ▲	20%	14%	8%	18%
Indiana	11%	12%	10%	6%	15%
	11%	12%	9%	5%	18%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.

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

All ORV riders | Traveller types are defined on slide 10

Few past visitors name another destination (2% vs. 4%).

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

Destination	Overall (n=367 / 236)	Younger Families (n=121 / 91)	Older Families (n=85 / 57)	Younger Friends (n=55 / 37)	Older Friends* (n=75 / 30)
Illinois	10%	12%	7%	5%	12%
	12%	14%	7%	5%	14%
New Jersey	10%	12%	9%	8%	5%
	10%	12%	10%	7%	5%
Other	4%	1%	6%	1%	11%
	2% ▼	1%	2%	0%	7%

All ORV riders (overall) Have visited Northern Ontario (past 5 years)

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

Base: all ORV riders (n=367; past visitors n=236). 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); significance is not shown for these items.
*Small base (n<30) for overall or visitors; interpret with caution. Significance not tested.