CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE I
Avid Outdoor Adventure: All Outdoor Adventurers 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 three priority traveller segments to Northern Ontario: Anglers, Hunters, and Outdoor Adventure tourists. The study updates and extends research conducted in 2014/15. Findings are designed to inform product development, investment attraction, and marketing, with a focus on identifying realistic growth opportunities grounded in the realities of travel in Northern Ontario.

Objectives:
The objectives of this survey are to evaluate:

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



METHODOLOGY

Methodology:
- CAWI (Computer-Assisted Web Interview)

Qualifying Criteria:
- 30 to 64 years old
- Participated in outdoor adventure activities 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 Outdoor Adventure: The respondents who participate in at least one of cycling, paddling, camping, hiking, climbing or winter outdoor activities, have a high household income (CA: $75K+ / US: $50K+) and meet at least two of four criteria: participate at least twice a month, describe themselves as intermediate or advanced, have taken an overnight trip where outdoor activities were the main purpose, or have spent at least $1,000 on gear in the past two years

Total Sample:
- Avid Outdoor Adventure: n=1,559

Fieldwork Date:
- May 14th – June 3rd, 2026

Median Length of Interview:
- 18.3 minutes



REGIONAL SAMPLE SIZE

Regional Sample Size

Total	1,559
Canada	598
Ontario	198
Quebec	94
Manitoba	89
Alberta	104
British Columbia	114

U.S. Drive	762
Illinois	123
Ohio	90
New York	116
Michigan	92
Wisconsin	65
Minnesota	80
Pennsylvania	89
Indiana	38
New Jersey	69

U.S. Fly	198
California	76
Colorado	72
Texas	50



METHODOLOGY

Survey Language:
The survey was administered in English and French

Margin of Error:
Avid Outdoor Adventure: ± 2.5%

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 outdoor adventurer: Aged 30–64, participates in at least one of cycling, paddling, camping, hiking, climbing or winter outdoor activities, has a household income of $75K+ (Canada) or $50K+ (U.S.), and meets at least two of four participation, skill, trip and spending criteria.

Markets: Ontario; Rest of Canada (Quebec, Manitoba, Alberta, British Columbia); U.S. Drive (Minnesota, Wisconsin, Illinois, Michigan, Indiana, Ohio, Pennsylvania, New York, New Jersey); U.S. Fly (California, Colorado, Texas).

Past visitors: Respondents who have visited Northern Ontario for an outdoor adventure trip in the past five years (46% of avid outdoor adventurers, n=712).

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

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

Travel party spend: Total spend by the travel party on the most recent Northern Ontario trip, including accommodation, food and drink, activities, equipment and transportation within the region, and excluding airfare and pre-trip shopping. Shown in Canadian dollars; U.S. responses converted at 1.394.

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

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

AVG: Average (mean) response.

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



REPORT VERSION

All Outdoor Adventurers report (this report)
All avid outdoor adventurers, n=1,559

Covers who avid outdoor adventurers 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 outdoor adventure segment, including those who have not yet visited Northern Ontario.

Past Visitors report
Avid outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past five years, n=712

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 outdoor adventurers 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 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 OUTDOOR ADVENTURERS

Outdoor adventurers are experienced, with younger groups newer to the activities. More than half (54%) have been participating for more than 10 years, rising to 70% of older friend groups and 68% of Rest of Canada outdoor adventurers, against 29% of younger friend groups and 34% of younger families. First exposure is varied: a family member (38%), friends or peers (27%), self-discovery (18%) or a school, camp or organized program (16%). (See slides 36–37, 41)

Trips are frequent, multi-night and focused on summer and fall. Outdoor adventurers take an average of 3.9 overnight trips a year of 4.1 nights, rising to 4.3 trips among younger families, and are willing to travel 8.6 hours one way. Summer (71%) and fall (56%) are the preferred seasons, and younger families are more drawn to winter (36%). Most travel by personal vehicle (84%), and a third fly to a regional hub and drive on (36%), rising to 44% of younger families and younger friend groups. (See slides 38–39, 44, 46, 48)

Most combine their own gear with local operators, and many mix guided and self-guided trips. More than half (56%) also use local outfitters or operators, rising to 69% of younger friend groups and 65% of U.S. Fly outdoor adventurers, and 45% mix guided and self-guided experiences. Two-thirds (65%) say working with a local operator is important, rising to 77% of younger families and 75% of U.S. Fly outdoor adventurers and falling to 49% of Rest of Canada outdoor adventurers. (See slides 49, 51, 66)

Planning starts online and through word of mouth, with strong interest in AI. Internet search (52%) and word of mouth (51%) lead, followed by social media (41%), booking sites (40%) and official tourism websites (39%), with younger families and younger friend groups more reliant on social media (50% each). Most plan one to six months ahead and book directly with accommodation providers (61%) or online (59%), and 62% are likely to use AI to plan, rising to 76% of younger families and falling to 46% of Rest of Canada outdoor adventurers. (See slides 54, 56–61, 64, 67)



EXECUTIVE SUMMARY – MOTIVATIONS, VALUES & BARRIERS

ALL AVID OUTDOOR ADVENTURERS

Nature, escape and new places drive outdoor adventure trips. Connection with nature (68%), escape (67%) and experiencing new places (66%) lead, followed by bonding (53%), wildlife encounters (50%) and physical fitness (46%), with fitness rising to 55% among Rest of Canada outdoor adventurers and solitude to 49% among older friend groups. Northern Lights viewing (57%) and scenic driving (53%) are the strongest add-ons, rising to 65% and 60% among older families, while younger families are more interested in wellness (41%), multi-activity packages (36%) and youth programs (32%). (See slides 69–76)

Responsibility to the environment is near-universal, but willingness to pay for it varies. Nine in ten (91%) feel a personal responsibility to protect the places they visit, and supporting local businesses (88%) and conservation (87%) lead destination considerations. Two-thirds (68%) would pay more for a clear conservation benefit, rising to 74% of U.S. Drive outdoor adventurers and 79% of younger families, and falling to 55% of Rest of Canada outdoor adventurers. (See slides 89, 91–92)

Cost and transportation are the main barriers. Cost (38%) and high transportation costs (35%) lead, followed by wildfires and weather (32% each) and safety (30%), with cost rising to 50% among Rest of Canada outdoor adventurers and 46% among partners. Ontario outdoor adventurers are more concerned about insects (41%), weather (41%) and road or water access (36%), and anti-American sentiment is cited by 23% of U.S. Drive and 24% of U.S. Fly outdoor adventurers. Six in ten (59%) say financial pressures have affected their travel plans. (See slides 121–127)



EXECUTIVE SUMMARY – DESTINATION STRENGTH & FUTURE DEMAND

ALL AVID OUTDOOR ADVENTURERS

Northern Ontario is well regarded, though many know little about it. Three-quarters know a lot (25%) or a little (53%) about Northern Ontario, and younger families are more likely to know a lot (41%). Among those who know it, 87% rate it 4 or 5 out of 5, rising to 92% of U.S. Drive outdoor adventurers, and agree it offers a wide variety of outdoor adventure activities (93%), pristine lakes and authentic wilderness experiences (94% each). (See slides 96–98, 100, 102)

Advocacy is moderate and varies by market and life stage. Northern Ontario's Net Promoter Score is 21, rising to 31 among U.S. Drive outdoor adventurers and 36 among younger families, and falling to 9 among older families and -2 among Rest of Canada outdoor adventurers. Only 44% of Rest of Canada outdoor adventurers say Northern Ontario is better than alternatives closer to home, against 67% overall. (See slides 99–100)

Intent is solid, led by younger audiences. Seven in ten (69%) are likely to visit in the next two years, including 37% who are very likely, rising to 87% of younger families and 79% of younger friend groups and falling to 55% of partners and 50% of Rest of Canada outdoor adventurers. Three-quarters would make Northern Ontario the only (26%) or primary (47%) destination of a trip. (See slides 105–106)

Outdoor adventurers want nature, safety and good terrain, with road access and roofed lodging. Access to nature (93%), safety and quality terrain and trails (92% each) are the leading decision factors, and younger families place more importance on companion activities (83%), outfitters (80%) and events (77%). Most prefer road-accessible areas (87%), though a third would consider fly-in access (33%), and hotels or motels (51%), commercial cottages (46%), campgrounds and drive-in lodges (45% each) are the preferred lodging. (See slides 108–112, 114)



EXECUTIVE SUMMARY – ESTABLISHED AUDIENCES & FUTURE GROWTH

ALL AVID OUTDOOR ADVENTURERS

Outdoor adventure balances an established base of older families with younger families driving future growth. Older families make up about a quarter (26%) of the estimated market and remain central to it, although their trip frequency in Northern Ontario is generally stable or declining. Younger families are an equally large audience (26%), and they show the highest intent and are the most likely to be taking more Northern Ontario trips than they were 10 years ago. (See slides 29, 105, and slide 20 of the Past Visitors report)

Older families are the established base: experienced and family-focused, but less engaged with Northern Ontario. They are experienced (65% participating for more than 10 years) and motivated by connection with nature (74%), escape (71%) and bonding (68%). Northern Lights viewing (65%) and scenic driving (60%) would enhance their trips, and they plan through word of mouth (56%), internet search (55%) and travel guides (30%). They are less familiar with Northern Ontario (25% know nothing about it), give a lower Net Promoter Score (9), and transportation costs and cost (41% each) are their main concerns. (See slides 37, 59–61, 70, 74–76, 97, 99, 124–126)

Younger families are the growth audience. They make up 26% of the estimated market, take the most trips (4.3 a year), are the most likely to know a lot about Northern Ontario (41%) and to visit in the next two years (87%), and 31% are taking more Northern Ontario trips than 10 years ago. They give the highest Net Promoter Score (36), are more interested in wellness (41%), multi-activity packages (36%) and youth programs (32%), and 77% value working with local operators. They rely more on social media (50%) and AI tools (36%), and 76% are likely to use AI to plan. (See slides 38, 59–61, 66–67, 74–76, 97, 99, 105, and slide 20 of the Past Visitors report)



EXECUTIVE SUMMARY – SPEND, YIELD & ECONOMIC POTENTIAL

ALL AVID OUTDOOR ADVENTURERS

Outdoor adventure trips to Northern Ontario are high-value. Travel parties spent an average of $3,104 on their most recent trip, about $740 per visitor over 4.2 nights (roughly $180 per visitor per night), and seven in ten (72%) stayed in paid roofed accommodation.

U.S. visitors deliver the highest yield. U.S. Fly visitors spend about $980 per visitor and U.S. Drive visitors about $920, against $430 for Ontario visitors and $490 for Rest of Canada visitors. The U.S. markets make up 87% of the potential market but 93% of its potential value. Rest of Canada visitors stay longest (4.7 nights) but spend the least per night.

Couples spend the most per person, and families the most per trip. Partners spend about $1,310 per visitor because they travel in pairs, while older families spend the most per party ($3,455) and younger families are the most likely to use paid lodging (81%). Older friend groups are the least likely to use paid lodging (52%).

Small gains in visitation or length of stay are worth a lot. Every 1,000 additional U.S. Drive outdoor adventurers would bring about $920,000 in visitor spending and 4,000 visitor nights. Each extra night adds about $180 per visitor, which makes the levers to extend stays (better value, quality paid accommodation and more for travel companions to do) economically significant.



SPEND AND LENGTH OF STAY BY MARKET

ALL AVID OUTDOOR ADVENTURERS

U.S. visitors spend the most per trip, per visitor and per night; Canadian visitors spend less and are less likely to stay in paid roofed lodging. Rest of Canada visitors stay longest (4.7 nights) but spend the least per night.

Measure	Overall	Ontario	Rest of Canada	U.S. Drive	U.S. Fly
Average party spend per trip	$3,104	$1,870 ▼	$1,848 ▼	$3,951 ▲	$4,335 ▲
Average party size (people)	4.2	4.3	3.8	4.3	4.4
Spend per visitor per trip	$741	$434	$486	$918	$981
Average nights	4.2	4.0	4.7	4.0	4.3
Spend per visitor per night	$176	$108	$103	$228	$226
Stayed in paid roofed lodging	72%	63% ▼	62% ▼	78% ▲	82%

Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than the rest of the sample.



SPEND AND LENGTH OF STAY BY TRAVELLER TYPE

ALL AVID OUTDOOR ADVENTURERS

Families spend the most per trip; partners spend the most per person. Younger families are the most likely to stay in paid roofed lodging (81%) and older friend groups the least (52%).

Measure	Overall	Partners	Younger families	Older families	Younger friends	Older friends
Average party spend per trip	$3,104	$2,626	$3,222	$3,455	$2,905	$2,945
Average party size (people)	4.2	2.0	5.2	5.6	4.0	4.0
Spend per visitor per trip	$741	$1,313	$617	$622	$727	$735
Average nights	4.2	4.5	4.4	4.2	3.8	4.4
Spend per visitor per night	$176	$294	$142	$148	$193	$168
Stayed in paid roofed lodging	72%	71%	81% ▲	71%	69%	52% ▼

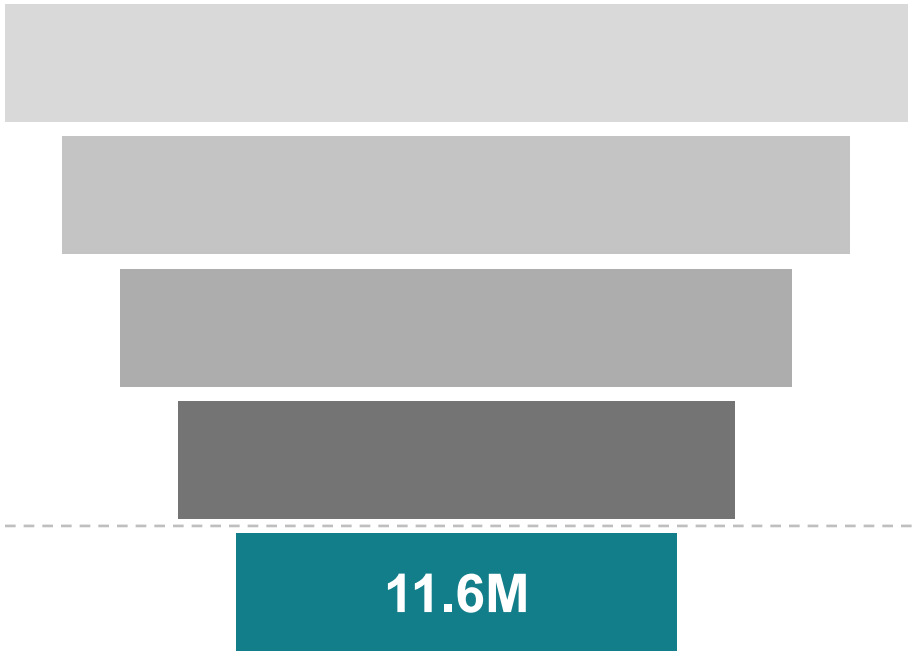
Base: past-five-year visitors to Northern Ontario (most recent trip). Spend in CAD; U.S. spend converted at 1.37. Party size = respondent + typical travel companions. Spend per visitor = party spend ÷ party size; spend per night = spend per visitor ÷ average nights. ▲/▼ Significantly higher/lower than the rest of the sample.



MARKET SUMMARY

HOW THE OPPORTUNITY POOL IS BUILT: AVID OUTDOOR ADVENTURERS

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.

Outdoor adventure participants
Residents who take part in at least one outdoor adventure activity.

Aged 30–64
Outdoor adventure participants within the study's target age range.

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

Opportunity pool
Outdoor adventurers who intend to visit Northern Ontario for an outdoor adventure 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 1 survey. Income threshold: $75K+ CAD (Canada), $50K+ USD (U.S.).

ESTIMATED NORTHERN ONTARIO OPPORTUNITY POOL: AVID OUTDOOR ADVENTURERS

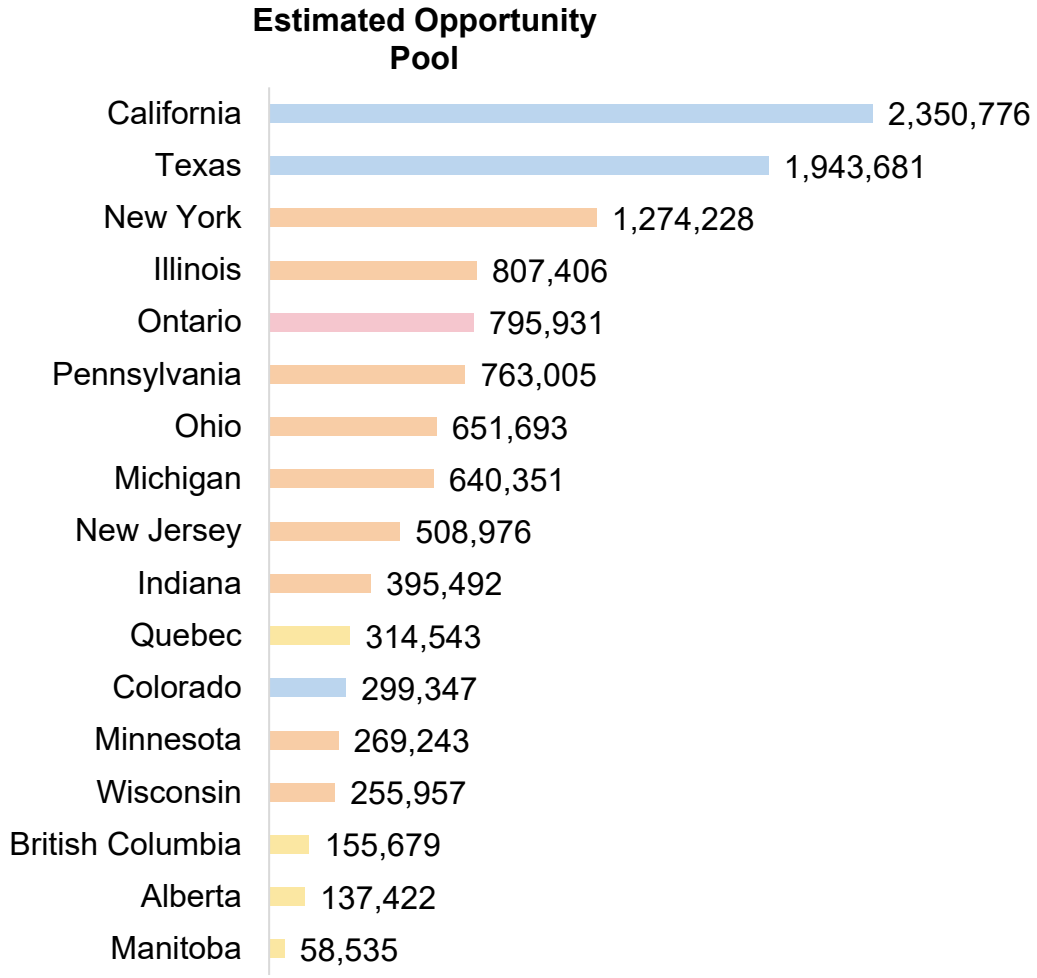
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO
795,931

Rest of Canada
666,178

U.S. Drive
5,566,351

U.S. Fly
4,593,804



Avid outdoor adventurers aged 30–64 in the surveyed markets who told us they intend to take an outdoor adventure trip to Northern Ontario in the next two years. Not a forecast of visitors. All markets: 11,622,264.

INCREMENTAL VISITOR SPEND: AVID OUTDOOR ADVENTURERS

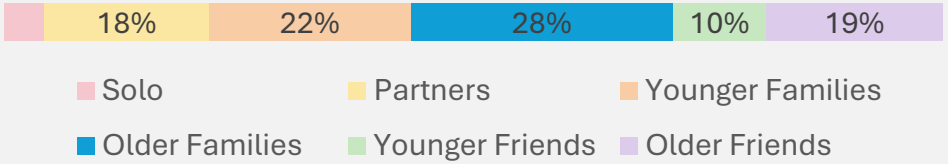
Surveyed markets only: Ontario; Rest of Canada (QC, MB, AB, BC); U.S. Drive (MN, WI, IL, MI, IN, OH, PA, NY, NJ); U.S. Fly (CA, CO, TX)

ONTARIO **795,931** Opportunity pool	**1,000** additional visitors	×	**$434** spend per visitor	=	**$434K** incremental visitor spend
Rest of Canada **666,178** Opportunity pool	**1,000** additional visitors	×	**$486** spend per visitor	=	**$486K** incremental visitor spend
U.S. Drive **5,566,351** Opportunity pool	**1,000** additional visitors	×	**$918** spend per visitor	=	**$918K** incremental visitor spend
U.S. Fly **4,593,804** Opportunity pool	**1,000** additional visitors	×	**$981** spend per visitor	=	**$981K** incremental visitor spend

Incremental direct visitor spending if 1,000 additional avid outdoor adventurers 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.

ONTARIO – OUTDOOR ADVENTURE

ESTIMATED OPPORTUNITY POOL: 795,931



HOW THEY TRAVEL

- Ontario outdoor adventurers are the most frequent visitors (76% have visited, averaging 2.8 trips in five years), but take lower-spend trips ($1,870) and are among the least likely to rate their trip better than elsewhere (58%).
- 76% have taken outdoor adventure trips in Northern Ontario in the past five years (the highest of any market), averaging 2.8 trips.
- Their most recent trip lasted 4.0 nights at $1,870 per party (below the segment's $3,104), and 63% stayed in paid roofed lodging.
- Commercial cottages or cabins (55%) and drive-in lodges or resorts (50%) are the preferred lodging options.
- The Great Canadian Wilderness (51%) and Northeast Ontario (43%) are the most visited regions, and summer (74%) and fall (60%) the preferred seasons. (See slides 44, 114, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Connection with nature (68%) and escape from everyday stress (67%) are the leading motivations.
- Experiencing new places follows (61%).
- Northern Lights viewing (64%) and scenic driving (53%) are the strongest add-on experiences. (See slides 69, 71–73)

WHAT THEY VALUE

- Supporting local businesses (83%) and community benefit (83%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (56%) and paying more for a clear conservation benefit (68%) are lower than in the segment.
- 90% feel a personal responsibility to protect the natural environments they visit. (See slides 89, 91–92)

WHAT HOLDS THEM BACK

- Weather or season timing (41%), insects (41%) and wildfires and other disruptions (38%) are the leading barriers.
- Poor road, trail or water access weighs more than for the segment overall (36% vs. 27%).
- 61% say financial pressures have affected their travel plans. (See slides 121–123, 127)

WHAT WOULD GROW THEM

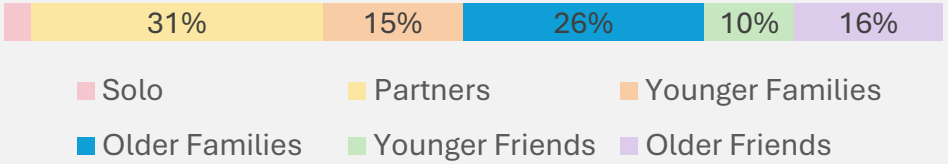
- Better value (43%), quality paid accommodation (40%) and more for travel companions to do (33%) would most encourage longer stays.
- 77% are likely to visit in the next two years (the highest of any market).
- Among those who know the region, Northern Ontario's NPS is 23 (segment 21). (See slides 99, 105, 116–117)

WHERE TO REACH THEM

- Word of mouth (59%), general search (54%) and official tourism websites (41%) are the leading planning sources.
- Among social media users, YouTube (78%), Instagram (71%) and Facebook (52%) lead.
- 52% are likely to use AI tools to plan their next trip (below the segment's 62%). (See slides 56–58, 62, 67)

REST OF CANADA – OUTDOOR ADVENTURE

ESTIMATED OPPORTUNITY POOL: 666,178



HOW THEY TRAVEL

- Rest of Canada outdoor adventurers are the least engaged market: half (50%) are likely to visit, their Net Promoter Score is -2, and cost is a barrier for half (50%).
- 38% have taken outdoor adventure trips in Northern Ontario in the past five years (below the segment's 46%), averaging 0.8 trips.
- Their most recent trip lasted 4.7 nights at $1,848 per party (the lowest of any market), and 62% stayed in paid roofed lodging.
- Hotels or motels (53%) and commercial cottages or cabins (48%) are the preferred lodging options.
- Sunset Country (18%) and Superior Country (16%) are the most visited regions, and summer (75%) and fall (49%) the preferred seasons. (See slides 44, 114, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Connection with nature (72%) and escape from everyday stress (70%) are the leading motivations.
- Physical fitness and health matters more than in the segment overall (55% vs. 46%).
- Scenic driving (58%) and Northern Lights viewing (54%) are the strongest add-on experiences. (See slides 69, 71–73)

WHAT THEY VALUE

- Supporting local businesses (86%) and conservation (86%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (51%) and paying more for a clear conservation benefit (55%) are lower than in the segment.
- 90% feel a personal responsibility to protect the natural environments they visit. (See slides 89, 91–92)

WHAT HOLDS THEM BACK

- Cost (50%), transportation costs (43%) and wildfires and other disruptions (38%) are the leading barriers.
- Poor value for money weighs more than for the segment overall (36% vs. 27%).
- 64% say financial pressures have affected their travel plans. (See slides 121–123, 127)

WHAT WOULD GROW THEM

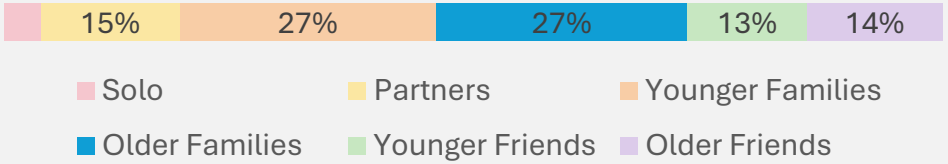
- Better value (39%), quality paid accommodation (32%) and better connectivity (26%) would most encourage longer stays.
- 50% are likely to visit in the next two years (the lowest of any market).
- Among those who know the region, Northern Ontario's NPS is -2, below the segment (21). (See slides 99, 105, 116–117)

WHERE TO REACH THEM

- Word of mouth (57%), general search (56%) and official tourism websites (45%) are the leading planning sources.
- Among social media users, Facebook (67%), YouTube (67%) and Instagram (61%) lead.
- 46% are likely to use AI tools to plan their next trip (the lowest of any market). (See slides 56–58, 62, 67)

U.S. DRIVE – OUTDOOR ADVENTURE

ESTIMATED OPPORTUNITY POOL: 5,566,351



HOW THEY TRAVEL

- U.S. Drive outdoor adventurers are the core market, with the highest Net Promoter Score of any market (31), strong intent to visit (75%) and the most use of packaged experiences on their most recent trip (54%).
- 45% have taken outdoor adventure trips in Northern Ontario in the past five years, averaging 1.0 trips.
- Their most recent trip lasted 4.0 nights at $3,951 per party (above the segment's $3,104), and 78% stayed in paid roofed lodging.
- Hotels or motels (51%) and designated campgrounds (47%) are the preferred lodging options.
- Superior Country (19%) and Sunset Country (18%) are the most visited regions, and summer (70%) and fall (60%) the preferred seasons. (See slides 44, 114, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Experiencing new places (67%) and connection with nature (67%) are the leading motivations.
- Tradition or cultural heritage matters more than in the segment overall (24% vs. 20%).
- Northern Lights viewing (59%) and scenic driving (51%) are the strongest add-on experiences. (See slides 69, 71–73)

WHAT THEY VALUE

- Supporting local businesses (89%) and conservation (88%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (81%) and paying more for a clear conservation benefit (74%) are higher than in the segment.
- 92% feel a personal responsibility to protect the natural environments they visit. (See slides 89, 91–92)

WHAT HOLDS THEM BACK

- Cost (34%), transportation costs (32%) and weather or season timing (31%) are the leading barriers.
- Insects are less of a concern (22% vs. 26%).
- 58% say financial pressures have affected their travel plans. (See slides 121–123, 127)

WHAT WOULD GROW THEM

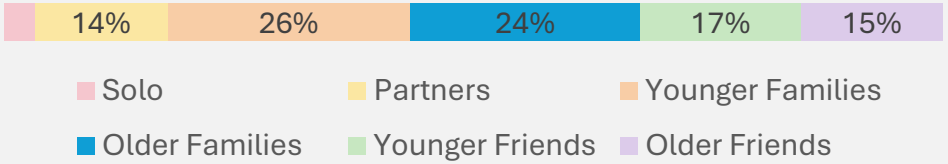
- Better value (44%), more for travel companions to do (41%) and quality paid accommodation (35%) would most encourage longer stays.
- 75% are likely to visit in the next two years (above the segment's 69%).
- Among those who know the region, Northern Ontario's NPS is 31, above the segment (21). (See slides 99, 105, 116–117)

WHERE TO REACH THEM

- General search (48%), word of mouth (47%) and booking or review sites (43%) are the leading planning sources.
- AI tools play a bigger role than for the segment (32% vs. 26%).
- Among social media users, YouTube (79%), Facebook (70%) and Instagram (69%) lead.
- 71% are likely to use AI tools to plan their next trip (above the segment's 62%). (See slides 56–58, 62, 67)

U.S. FLY – OUTDOOR ADVENTURE

ESTIMATED OPPORTUNITY POOL: 4,593,804



HOW THEY TRAVEL

- U.S. Fly outdoor adventurers are the highest-value market, spending $4,335 per party, and the most likely to rate their trip better than elsewhere (93%), but the least likely to have visited (35%).
- 35% have taken outdoor adventure trips in Northern Ontario in the past five years (the lowest of any market), averaging 0.8 trips.
- Their most recent trip lasted 4.3 nights at $4,335 per party (the highest of any market), and 82% stayed in paid roofed lodging.
- Hotels or motels (49%) and AirBnB (49%) are the preferred lodging options.
- The Great Canadian Wilderness (14%) and Algoma Country (13%) are the most visited regions, and summer (66%) and fall (53%) the preferred seasons. (See slides 44, 114, and slides 17–18, 21, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM

- Experiencing new places (72%) and escape from everyday stress (67%) are the leading motivations.
- Connection with nature follows (67%).
- Local markets and artisans (54%) and scenic driving (52%) are the strongest add-on experiences. (See slides 69, 71–73)

WHAT THEY VALUE

- Supporting local businesses (93%) and conservation (91%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (81%) and paying more for a clear conservation benefit (76%) are higher than in the segment.
- 93% feel a personal responsibility to protect the natural environments they visit. (See slides 89, 91–92)

WHAT HOLDS THEM BACK

- Safety concerns (32%), cost (29%) and transportation costs (29%) are the leading barriers.
- Insects are less of a concern (17% vs. 26%).
- 54% say financial pressures have affected their travel plans. (See slides 121–123, 127)

WHAT WOULD GROW THEM

- More for travel companions to do (56%), quality paid accommodation (49%) and better value (42%) would most encourage longer stays.
- 75% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 24 (segment 21). (See slides 99, 105, 116–117)

WHERE TO REACH THEM

- General search (56%), word of mouth (46%) and social media content (43%) are the leading planning sources.
- Among social media users, YouTube (80%), Instagram (74%) and Facebook (58%) lead.
- 72% are likely to use AI tools to plan their next trip (the highest of any market). (See slides 56–58, 62, 67)



TRAVELLER TYPE SUMMARY

ESTIMATED OPPORTUNITY POOL BY TRAVELLER TYPE: AVID OUTDOOR ADVENTURERS

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
422,058

YOUNGER FAMILIES
2,979,917

YOUNGER FRIENDS
1,640,243

PARTNERS
1,819,882

OLDER FAMILIES
3,007,538

OLDER FRIENDS
1,752,626

Avid outdoor adventurers aged 30–64 in the surveyed markets who told us they intend to take an outdoor adventure 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.

PARTNERS – OUTDOOR ADVENTURE

ESTIMATED OPPORTUNITY POOL: 1,819,882

WHO THEY ARE
- Partners are long-time, self-reliant outdoor adventurers (65% participating for more than 10 years, 64% fully self-guided), with the lowest intent to visit (55%) and the highest concern about cost (46%).
- 19% have children under 18 at home, and the largest age group is 55 to 64 (44%).
- 65% have been participating in outdoor adventure for more than 10 years (above the segment's 54%), and 43% use local outfitters or operators alongside their own gear (the lowest of any traveller type). (See slides 37, 50)

HOW THEY TRAVEL
- 34% have taken outdoor adventure trips in Northern Ontario in the past five years (the lowest of any traveller type), averaging 0.7 trips.
- Their most recent trip lasted 4.5 nights at $2,626 per party, and 71% stayed in paid roofed lodging.
- Commercial cottages or cabins (51%) and hotels or motels (51%) are the preferred lodging options.
- Northeast Ontario (14%) and The Great Canadian Wilderness (13%) are the most visited regions, and summer (69%) and fall (57%) the preferred seasons. (See slides 45, 115, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Connection with nature (66%) and escape from everyday stress (63%) are the leading motivations.
- Bonding with friends or family matters less than in the segment overall (33% vs. 53%).
- Scenic driving (56%) and Northern Lights viewing (55%) are the strongest add-on experiences. (See slides 70, 74–76)

WHAT THEY VALUE
- Minimal environmental impact (88%) and community benefit (87%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (56%) and paying more for a clear conservation benefit (60%) are lower than in the segment.
- 89% feel a personal responsibility to protect the natural environments they visit. (See slides 90, 93–94)

WHAT HOLDS THEM BACK
- Cost (46%), transportation costs (37%) and distance (34%) are the leading barriers.
- 56% say financial pressures have affected their travel plans. (See slides 124–127)

WHAT WOULD GROW THEM
- Better value (36%), quality paid accommodation (30%) and more for travel companions to do (27%) would most encourage longer stays.
- 55% 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 17 (segment 21). (See slides 99, 105, 118–119)

WHERE TO REACH THEM
- General search (58%), word of mouth (47%) and official tourism websites (43%) are the leading planning sources.
- Among social media users, YouTube (66%), Instagram (58%) and Facebook (56%) lead.
- 50% are likely to use AI tools to plan their next trip (the lowest of any traveller type). (See slides 59–61, 63, 67)

YOUNGER FAMILIES – OUTDOOR ADVENTURE

ESTIMATED OPPORTUNITY POOL: 2,979,917

WHO THEY ARE
- Younger families are the most engaged outdoor adventurers: the most likely to know a lot about Northern Ontario (41%), to have visited (65%) and to visit again (87%), with the highest Net Promoter Score (36).
- 97% have children under 18 at home, and the largest age group is 35 to 44 (70%).
- 34% have been participating in outdoor adventure for more than 10 years (below the segment's 54%), and 62% use local outfitters or operators alongside their own gear (above the segment's 56%). (See slides 37, 50)

HOW THEY TRAVEL
- 65% have taken outdoor adventure trips in Northern Ontario in the past five years (the highest of any traveller type), averaging 1.9 trips.
- Their most recent trip lasted 4.4 nights at $3,222 per party, and 81% stayed in paid roofed lodging.
- Hotels or motels (52%) and AirBnB (51%) are the preferred lodging options.
- Superior Country (31%) and Sunset Country (29%) are the most visited regions, and summer (77%) and spring (50%) the preferred seasons. (See slides 45, 115, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Connection with nature (67%) and experiencing new places (65%) are the leading motivations.
- Tradition or cultural heritage matters more than in the segment overall (29% vs. 20%).
- Northern Lights viewing (54%) and scenic driving (45%) are the strongest add-on experiences. (See slides 70, 74–76)

WHAT THEY VALUE
- Conservation (90%) and supporting local businesses (89%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (78%) and paying more for a clear conservation benefit (79%) are higher than in the segment.
- 93% feel a personal responsibility to protect the natural environments they visit. (See slides 90, 93–94)

WHAT HOLDS THEM BACK
- Weather or season timing (31%), wildfires and other disruptions (30%) and cost (29%) are the leading barriers.
- Transportation costs are less of a concern (27% vs. 35%).
- 58% say financial pressures have affected their travel plans. (See slides 124–127)

WHAT WOULD GROW THEM
- Better value (50%), quality paid accommodation (44%) and more for travel companions to do (43%) would most encourage longer stays.
- 87% 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 36, above the segment (21). (See slides 99, 105, 118–119)

WHERE TO REACH THEM
- Social media content (50%), general search (47%) and word of mouth (45%) are the leading planning sources.
- Influencers play a bigger role than for the segment (28% vs. 17%).
- Among social media users, YouTube (79%), Instagram (73%) and Facebook (70%) lead.
- 76% are likely to use AI tools to plan their next trip (the highest of any traveller type). (See slides 59–61, 63, 67)

OLDER FAMILIES – OUTDOOR ADVENTURE

ESTIMATED OPPORTUNITY POOL: 3,007,538

WHO THEY ARE
- Older families are experienced, family-focused outdoor adventurers who know less about Northern Ontario (25% know nothing about it) and give a lower Net Promoter Score (9).
- 72% have children under 18 at home, and the largest age group is 45 to 54 (65%).
- 65% have been participating in outdoor adventure for more than 10 years (above the segment's 54%), and 54% use local outfitters or operators alongside their own gear. (See slides 37, 50)

HOW THEY TRAVEL
- 37% have taken outdoor adventure trips in Northern Ontario in the past five years (below the segment's 46%), averaging 0.9 trips.
- Their most recent trip lasted 4.2 nights at $3,455 per party, and 71% stayed in paid roofed lodging.
- Hotels or motels (54%) and commercial cottages or cabins (53%) are the preferred lodging options.
- Northeast Ontario (18%) and Superior Country (15%) are the most visited regions, and summer (71%) and fall (57%) the preferred seasons. (See slides 45, 115, 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 matters more than in the segment overall (68% vs. 53%).
- Northern Lights viewing (65%) and scenic driving (60%) are the strongest add-on experiences. (See slides 70, 74–76)

WHAT THEY VALUE
- Conservation (88%) and supporting local businesses (87%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (72%) and paying more for a clear conservation benefit (69%) compare with 70% and 68% for the segment.
- 92% feel a personal responsibility to protect the natural environments they visit. (See slides 90, 93–94)

WHAT HOLDS THEM BACK
- Cost (41%), transportation costs (41%) and wildfires and other disruptions (34%) are the leading barriers.
- Not knowing enough about the region weighs more than for the segment overall (17% vs. 12%).
- 65% say financial pressures have affected their travel plans. (See slides 124–127)

WHAT WOULD GROW THEM
- More for travel companions to do (39%), better value (38%) and quality paid accommodation (38%) would most encourage longer stays.
- 61% are likely to visit in the next two years (below the segment's 69%).
- Among those who know the region, Northern Ontario's NPS is 9, below the segment (21). (See slides 99, 105, 118–119)

WHERE TO REACH THEM
- Word of mouth (56%), general search (55%) and booking or review sites (43%) are the leading planning sources.
- Travel guides and magazines play a bigger role than for the segment (30% vs. 24%).
- Among social media users, YouTube (75%), Facebook (73%) and Instagram (70%) lead.
- 60% are likely to use AI tools to plan their next trip. (See slides 59–61, 63, 67)

YOUNGER FRIENDS – OUTDOOR ADVENTURE

ESTIMATED OPPORTUNITY POOL: 1,640,243

WHO THEY ARE
- Younger friend groups are newer outdoor adventurers (29% participating for more than 10 years) who lean on outfitters (69%), social media (50%) and AI tools (71%), with strong intent to visit (79%).
- 46% have children under 18 at home, and the largest age group is 35 to 44 (61%).
- 29% have been participating in outdoor adventure for more than 10 years (the lowest of any traveller type), and 69% use local outfitters or operators alongside their own gear (the highest of any traveller type). (See slides 37, 50)

HOW THEY TRAVEL
- 54% have taken outdoor adventure trips in Northern Ontario in the past five years (above the segment's 46%), averaging 1.1 trips.
- Their most recent trip lasted 3.8 nights at $2,905 per party, and 69% stayed in paid roofed lodging.
- Hotels or motels (50%) and AirBnB (49%) are the preferred lodging options.
- Sunset Country (23%) and The Great Canadian Wilderness (23%) are the most visited regions, and summer (72%) and fall (54%) the preferred seasons. (See slides 45, 115, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

WHAT MOTIVATES THEM
- Connection with nature (63%) and experiencing new places (61%) are the leading motivations.
- Escape from everyday stress matters less than in the segment overall (58% vs. 67%).
- Local markets and artisans (45%) and Northern Lights viewing (44%) are the strongest add-on experiences. (See slides 70, 74–76)

WHAT THEY VALUE
- Supporting local businesses (88%) and minimal environmental impact (87%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (71%) and paying more for a clear conservation benefit (71%) compare with 70% and 68% for the segment.
- 87% feel a personal responsibility to protect the natural environments they visit. (See slides 90, 93–94)

WHAT HOLDS THEM BACK
- Cost (29%), safety concerns (28%) and weather or season timing (28%) are the leading barriers.
- Transportation costs are less of a concern (24% vs. 35%).
- 56% say financial pressures have affected their travel plans. (See slides 124–127)

WHAT WOULD GROW THEM
- Better value (44%), quality paid accommodation (38%) and more for travel companions to do (37%) would most encourage longer stays.
- 79% are likely to visit in the next two years (above the segment's 69%).
- Among those who know the region, Northern Ontario's NPS is 21 (segment 21). (See slides 99, 105, 118–119)

WHERE TO REACH THEM
- Social media content (50%), word of mouth (49%) and general search (45%) are the leading planning sources.
- Influencers play a bigger role than for the segment (24% vs. 17%).
- Among social media users, Instagram (77%), YouTube (76%) and Facebook (60%) lead.
- 71% are likely to use AI tools to plan their next trip (above the segment's 62%). (See slides 59–61, 63, 67)

OLDER FRIENDS – OUTDOOR ADVENTURE

ESTIMATED OPPORTUNITY POOL: 1,752,626

WHO THEY ARE
- Older friend groups are the most experienced outdoor adventurers (70% for more than 10 years), motivated by escape (74%) and solitude (49%), but only 8% are taking more Northern Ontario trips than 10 years ago.
- 19% have children under 18 at home, and the largest age group is 45 to 54 (51%).
- 70% have been participating in outdoor adventure for more than 10 years (the highest of any traveller type), and 57% use local outfitters or operators alongside their own gear. (See slides 37, 50)

HOW THEY TRAVEL
- 40% have taken outdoor adventure trips in Northern Ontario in the past five years, averaging 1.1 trips.
- Their most recent trip lasted 4.4 nights at $2,945 per party, and 52% stayed in paid roofed lodging.
- Designated campgrounds (52%) and commercial cottages or cabins (49%) are the preferred lodging options.
- The Great Canadian Wilderness (24%) and Algoma Country (14%) are the most visited regions, and summer (66%) and fall (66%) the preferred seasons. (See slides 45, 115, and slides 17–18, 22, 25, 28–29 of the Past Visitors report)

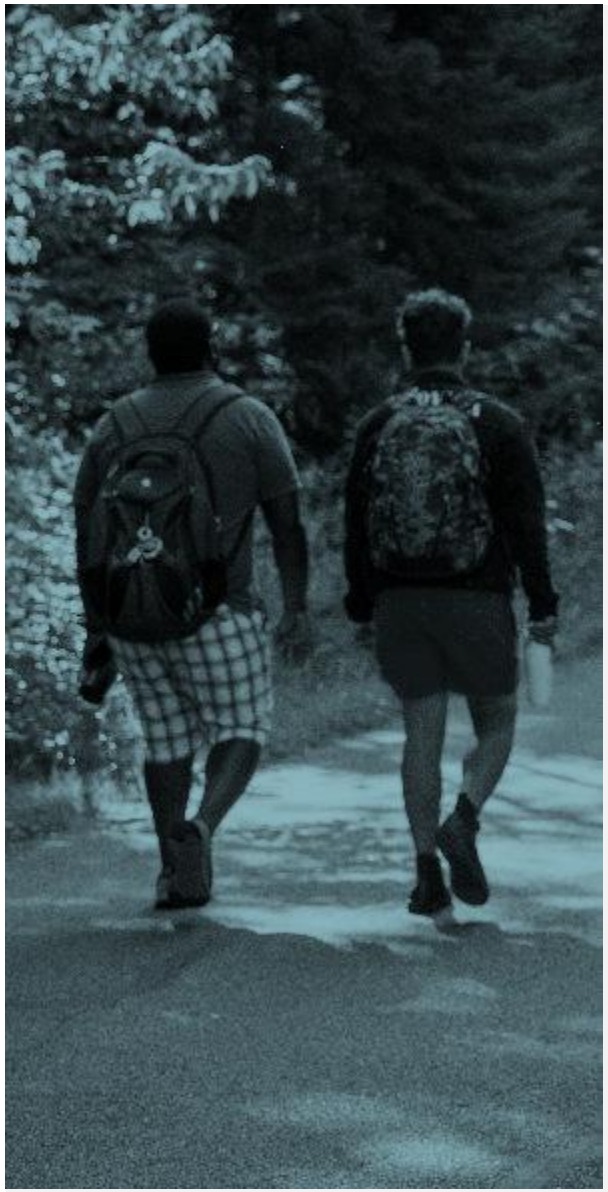
WHAT MOTIVATES THEM
- Escape from everyday stress (74%) and connection with nature (70%) are the leading motivations.
- Solitude and reflection matters more than in the segment overall (49% vs. 37%).
- Northern Lights viewing (62%) and scenic driving (57%) are the strongest add-on experiences. (See slides 70, 74–76)

WHAT THEY VALUE
- Supporting local businesses (92%) and conservation (91%) are the most important considerations when choosing a destination.
- Learning about Indigenous culture (73%) and paying more for a clear conservation benefit (65%) compare with 70% and 68% for the segment.
- 96% feel a personal responsibility to protect the natural environments they visit. (See slides 90, 93–94)

WHAT HOLDS THEM BACK
- Transportation costs (42%), cost (40%) and weather or season timing (37%) are the leading barriers.
- 62% say financial pressures have affected their travel plans. (See slides 124–127)

WHAT WOULD GROW THEM
- Better value (39%), better connectivity (37%) and more for travel companions to do (34%) would most encourage longer stays.
- 65% are likely to visit in the next two years.
- Among those who know the region, Northern Ontario's NPS is 19 (segment 21). (See slides 99, 105, 118–119)

WHERE TO REACH THEM
- Word of mouth (61%), general search (51%) and official tourism websites (39%) are the leading planning sources.
- Among social media users, YouTube (87%), Instagram (60%) and Facebook (56%) lead.
- 55% are likely to use AI tools to plan their next trip. (See slides 59–61, 63, 67)



TRAVELLER & AVIDITY

YEARS PARTICIPATING IN OUTDOOR ADVENTURE – MARKET

All outdoor adventurers

More than half of outdoor adventurers (54%) have been participating for more than 10 years, a quarter (25%) for 6 to 10 years and 17% for 2 to 5 years, while 4% are newcomers of less than 2 years.

Rest of Canada outdoor adventurers are more likely than other markets to have been participating for more than 10 years (68%), and U.S. Drive outdoor adventurers less likely (47%).

Years participating	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
Less than 2 years	4%	4%	2%	5%	8% ▲
2 to 5 years	17%	21%	13%	18%	15%
6 to 10 years	25%	19%	17% ▼	30% ▲	26%
More than 10 years	54%	55%	68% ▲	47% ▼	51%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). A1 How many years have you been participating in outdoor adventure activities as a hobby or recreational pursuit?

YEARS PARTICIPATING IN OUTDOOR ADVENTURE – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Older friend groups (70%), older families and partners (65% each) are more likely than other traveller types to have been participating for more than 10 years, while younger friend groups (29%) and younger families (34%) are less likely.

Younger friend groups and younger families are more likely to have been participating for 6 to 10 years (37% and 34%) or 2 to 5 years (28% and 27%).

Years participating	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Less than 2 years	4%	4%	6%	4%	5%	4%
2 to 5 years	17%	13%	27% ▲	10% ▼	28% ▲	9% ▼
6 to 10 years	25%	18% ▼	34% ▲	20%	37% ▲	17% ▼
More than 10 years	54%	65% ▲	34% ▼	65% ▲	29% ▼	70% ▲

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

Base: all outdoor adventurers (n=1,559). A1 How many years have you been participating in outdoor adventure activities as a hobby or recreational pursuit?

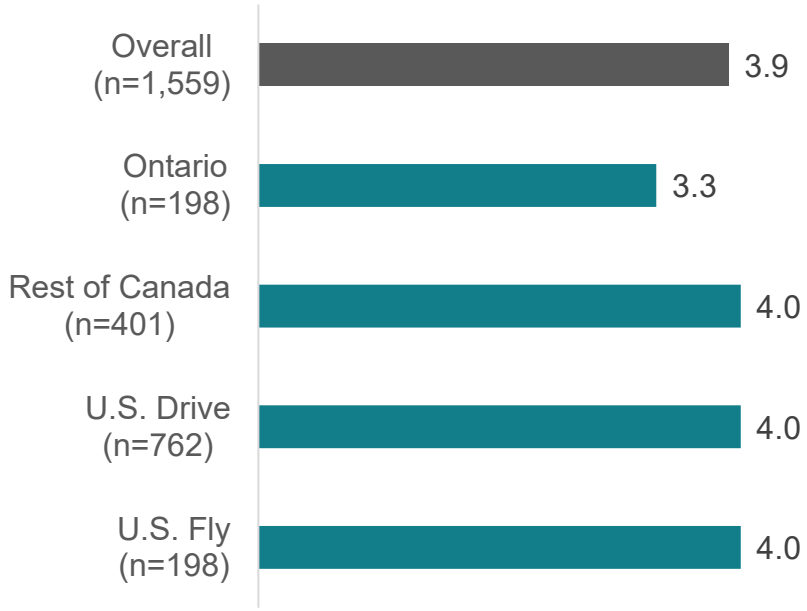
OUTDOOR ADVENTURE TRIPS PER YEAR

All outdoor adventurers | Traveller types are defined on slide 10

Outdoor adventurers take an average of 3.9 overnight trips per year where outdoor adventure activities are the primary purpose.

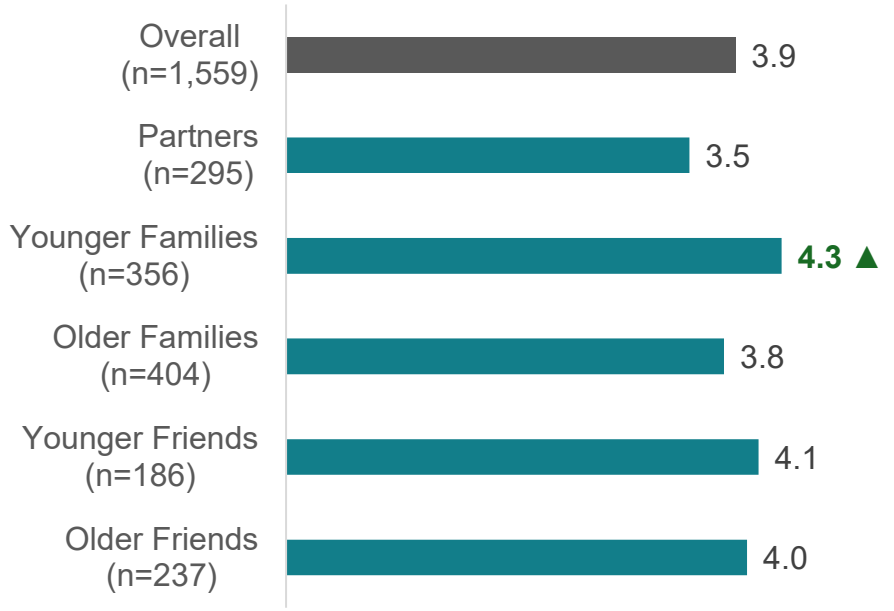
Younger families take more trips than other traveller types (4.3). Among markets, averages range from 3.3 trips among Ontario outdoor adventurers to 4.0 in each of the other markets.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all outdoor adventurers (n=1,559). A3 Approximately how many overnight trips per year do you take where outdoor adventure activities is the primary purpose? AVG = average number of overnight trips per year.

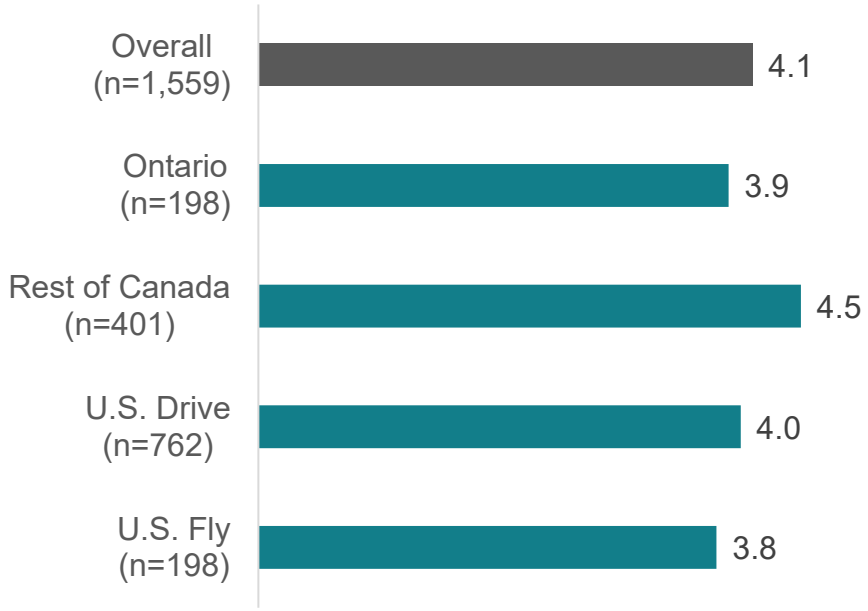
NIGHTS PER OUTDOOR ADVENTURE TRIP

All outdoor adventurers | Traveller types are defined on slide 10

Outdoor adventure trips last an average of 4.1 nights.

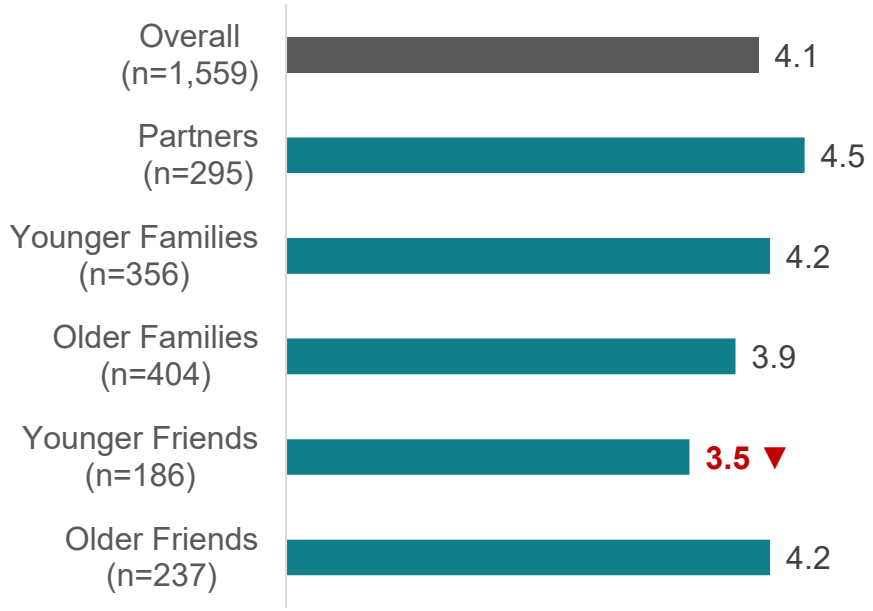
Younger friend groups take shorter trips than other traveller types (3.5 nights). Among markets, trip length ranges from 3.8 nights among U.S. Fly outdoor adventurers to 4.5 among Rest of Canada outdoor adventurers.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all outdoor adventurers (n=1,559). A4 How many nights do you typically spend on an outdoor adventure activities trip? AVG = average number of nights.

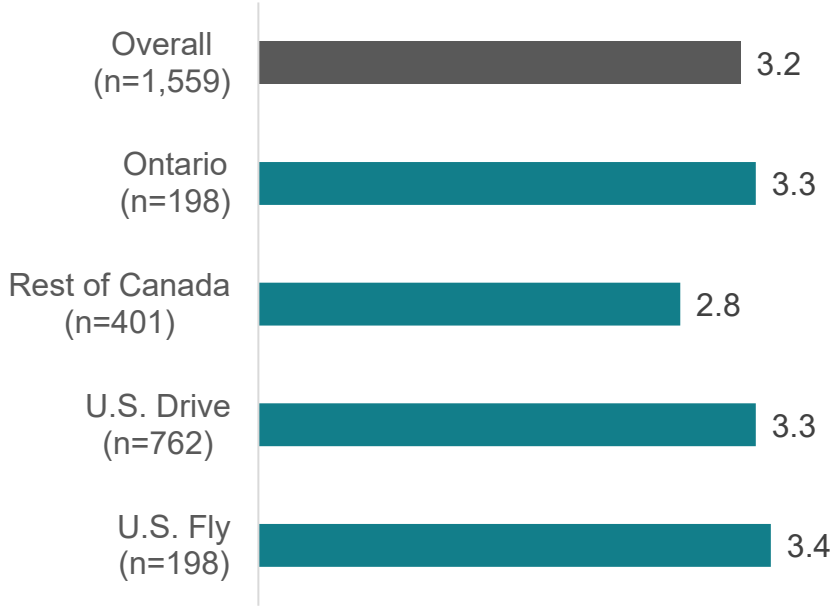
NUMBER OF PEOPLE TRAVELLED WITH ON OUTDOOR ADVENTURE TRIPS

All outdoor adventurers | Traveller types are defined on slide 10

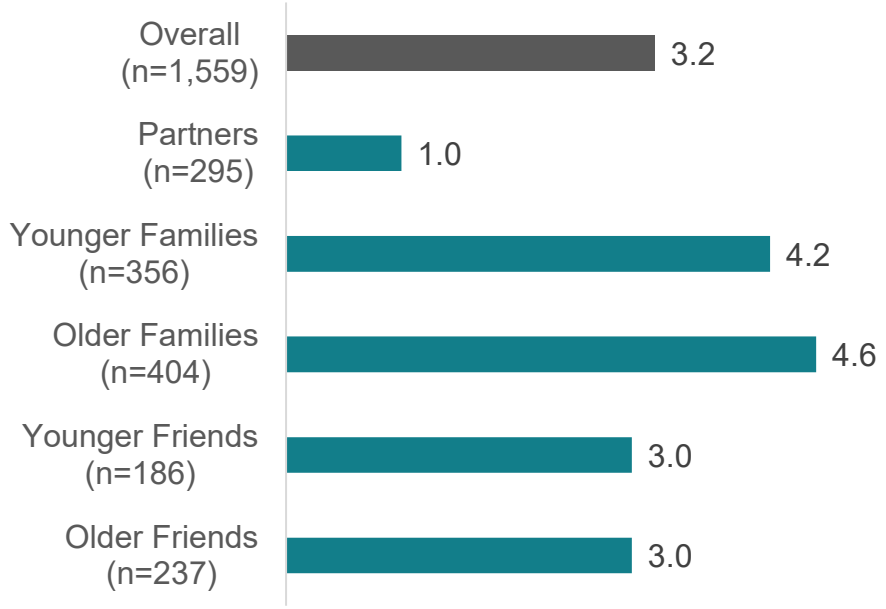
Outdoor adventurers typically travel with an average of 3.2 people on an outdoor adventure trip.

Families travel in the largest groups (4.6 people among older families and 4.2 among younger families), while partners travel with 1.0 person on average. Among markets, group size ranges from 2.8 among Rest of Canada outdoor adventurers to 3.4 among U.S. Fly outdoor adventurers.

MARKET



TRAVELLER TYPE



Base: all outdoor adventurers (n=1,559). A5 How many people do you typically travel with on an outdoor adventure activities 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 OUTDOOR ADVENTURE ACTIVITIES – MARKET

All outdoor adventurers

Outdoor adventurers got their first exposure through a family member (38%), friends or peers (27%), on their own (18%) or through a school, camp or organized program (16%).

Ontario outdoor adventurers are more likely than other markets to have been introduced by friends or peers (37%).

First exposure	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
A family member	38%	34%	38%	40%	37%
School, camp, or organized program	16%	15%	17%	16%	16%
Friends or peers	27%	37% ▲	24%	25%	29%
I discovered it on my own	18%	13%	18%	19%	16%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). A8 Where did you get your first exposure to outdoor adventure activities? "Not sure" (1%) not shown.

FIRST EXPOSURE TO OUTDOOR ADVENTURE ACTIVITIES – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

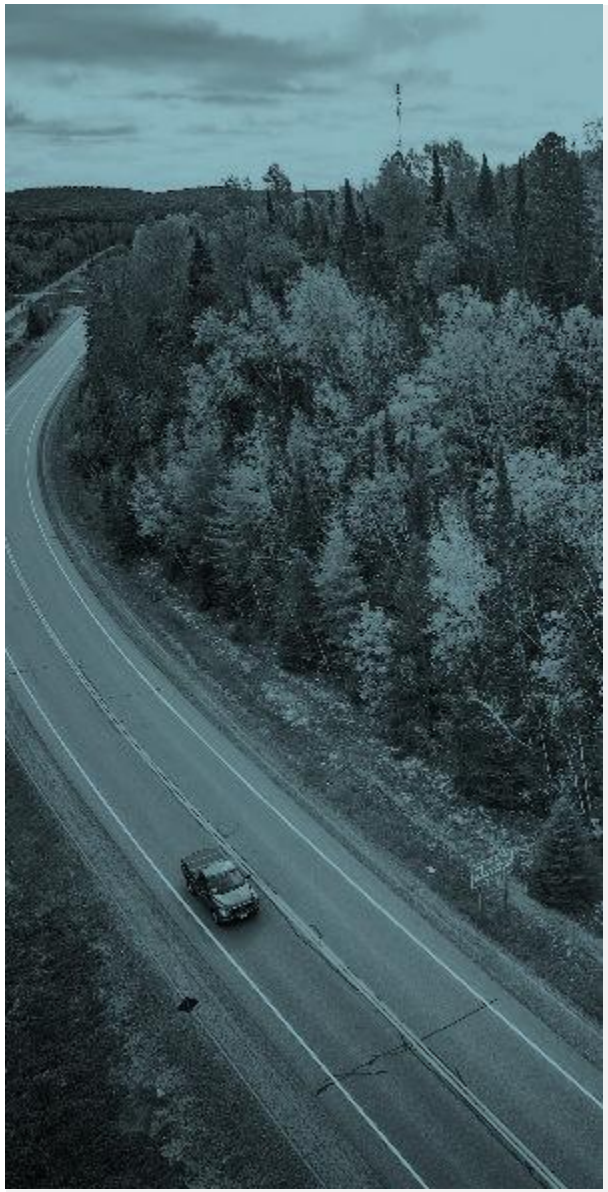
Younger friend groups (48%) and older friend groups (39%) are more likely than other traveller types to have been introduced by friends or peers, and younger (45%) and older families (48%) by a family member.

Partners are more likely to have discovered outdoor adventure on their own (27%).

First exposure	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
A family member	38%	36%	45% ▲	48% ▲	23% ▼	27% ▼
School, camp, or organized program	16%	16%	15%	14%	17%	22%
Friends or peers	27%	19% ▼	24%	20% ▼	48% ▲	39% ▲
I discovered it on my own	18%	27% ▲	15%	16%	12%	9% ▼

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

Base: all outdoor adventurers (n=1,559). A8 Where did you get your first exposure to outdoor adventure activities? "Not sure" (1%) not shown.



HOW THEY TRAVEL

PREFERRED SEASON FOR OUTDOOR ADVENTURE TRIPS – MARKET

All outdoor adventurers

Summer is the preferred season for outdoor adventure trips (71%), followed by fall (56%) and spring (49%), while a quarter (26%) prefer winter.

U.S. Drive outdoor adventurers are more likely than other markets to prefer spring (55%), and Ontario (37%) and Rest of Canada outdoor adventurers (42%) less likely; Rest of Canada outdoor adventurers are also less drawn to fall (49%).

Season	Overall (n=1,552)	Ontario (n=198)	Rest of Canada (n=398)	U.S. Drive (n=761)	U.S. Fly (n=196)
Winter (December – February)	26%	28%	25%	24%	33%
Spring (March – May)	49%	37% ▼	42% ▼	55% ▲	52%
Summer (June – August)	71%	74%	75%	70%	66%
Fall (September – November)	56%	60%	49% ▼	60%	53%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,552). T1 What is your preferred season for taking an outdoor adventure activities trip? Please select all that apply.

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

PREFERRED SEASON FOR OUTDOOR ADVENTURE TRIPS – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer winter (36%) and summer (77%), and less likely to prefer fall (50%).

Fall appeals most to older friend groups (66%), although this difference is not significant.

Season	Overall (n=1,552)	Partners (n=294)	Younger Families (n=354)	Older Families (n=401)	Younger Friends (n=186)	Older Friends (n=237)
Winter (December – February)	26%	20%	36% ▲	22%	28%	23%
Spring (March – May)	49%	46%	50%	48%	48%	52%
Summer (June – August)	71%	69%	77% ▲	71%	72%	66%
Fall (September – November)	56%	57%	50% ▼	57%	54%	66%

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

Base: all outdoor adventurers (n=1,552). T1 What is your preferred season for taking an outdoor adventure activities trip? Please select all that apply.

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

GETTING TO OUTDOOR ADVENTURE DESTINATIONS – MARKET

All outdoor adventurers

Most outdoor adventurers get to their destinations by personal vehicle (84%), while a third fly to a regional hub and then drive (36%) and a quarter travel with a trailer (27%).

U.S. Drive outdoor adventurers are more likely than other markets to fly to a regional hub (41%), and Rest of Canada outdoor adventurers less likely (27%).

Mode of travel	Overall (n=1,558)	Ontario (n=198)	Rest of Canada (n=400)	U.S. Drive (n=762)	U.S. Fly (n=198)
Personal vehicle (car, truck, SUV)	84%	87%	81%	84%	88%
Fly to a regional hub, then drive	36%	34%	27% ▼	41% ▲	32%
Personal vehicle with trailer (e.g., boat, camper, ATV)	27%	23%	23%	30%	29%
RV / motorhome	11%	8%	10%	13%	10%
Float plane or charter flight to a remote destination	9%	5%	7%	9%	13%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,558). T3 How do you typically get to your outdoor adventure activities destinations? Please select all that apply.

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

GETTING TO OUTDOOR ADVENTURE DESTINATIONS – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to fly to a regional hub (44%), travel with a trailer (38%) or use a float plane or charter flight (15%), and younger friend groups to fly to a regional hub (44%).

Partners are less likely to fly to a regional hub (27%) or travel with a trailer (20%), and older friend groups to use a float plane or charter (2%).

Mode of travel	Overall (n=1,558)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Personal vehicle (car, truck, SUV)	84%	80%	85%	84%	85%	88%
Fly to a regional hub, then drive	36%	27% ▼	44% ▲	29% ▼	44% ▲	37%
Personal vehicle with trailer (e.g., boat, camper, ATV)	27%	20% ▼	38% ▲	25%	28%	28%
RV / motorhome	11%	6%	14%	14%	9%	8%
Float plane or charter flight to a remote destination	9%	7%	15% ▲	7%	13%	2% ▼

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

Base: all outdoor adventurers (n=1,558). T3 How do you typically get to your outdoor adventure activities destinations? Please select all that apply.

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

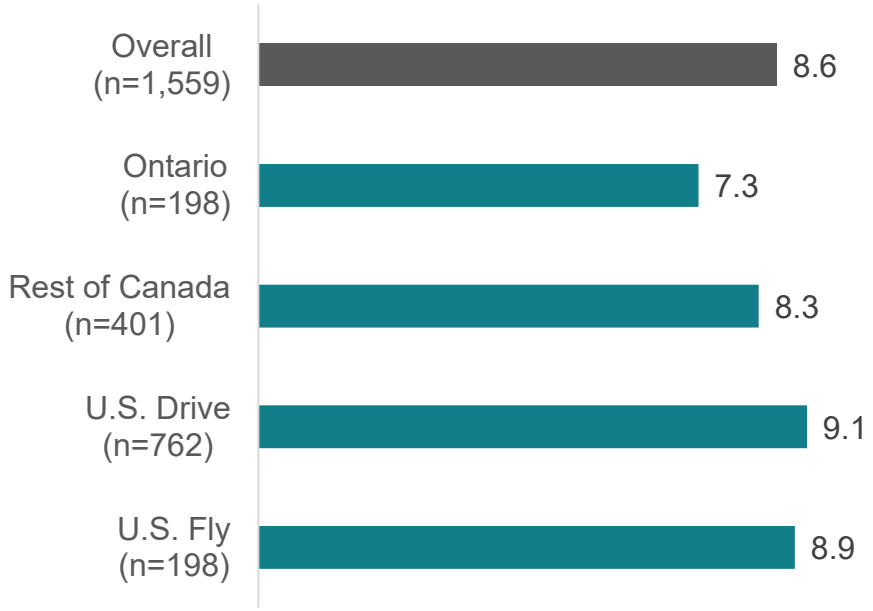
HOURS WILLING TO TRAVEL FOR AN OUTDOOR ADVENTURE TRIP

All outdoor adventurers | Traveller types are defined on slide 10

Outdoor adventurers are willing to travel an average of 8.6 hours one way for an outdoor adventure trip.

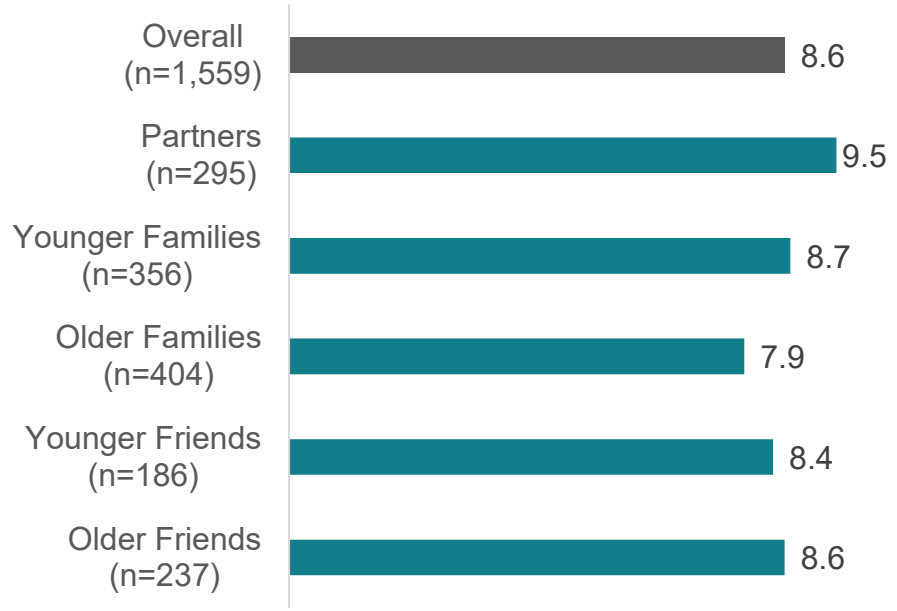
Travel time ranges from 7.3 hours among Ontario outdoor adventurers to 9.1 among U.S. Drive outdoor adventurers, and from 7.9 hours among older families to 9.5 among partners, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all outdoor adventurers (n=1,559). T4 Approximately how many hours are you willing to travel (one way) for an outdoor adventure activities trip? AVG = average number of hours.

APPROACH TO GEAR AND OUTFITTER USE – MARKET

All outdoor adventurers

More than half of outdoor adventurers (56%) have their own gear but also use local outfitters or operators for additional supplies or services, while 39% use their own gear only and 5% rely on outfitters, lodges or operators for most of their needs.

U.S. Fly outdoor adventurers are more likely than other markets to also use local outfitters or operators (65%), while Rest of Canada outdoor adventurers are more likely to use their own gear only (49%).

Approach	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
I have my own gear and do not use local outfitters or operators for supplies or services	39%	32%	49% ▲	37%	31%
I have my own gear but also use local outfitters or operators for additional supplies or services	56%	60%	46% ▼	57%	65% ▲
I rely on outfitters, lodges, or operators for most knowledge, supplies, and services	5%	5%	4%	6%	5%

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 outdoor adventurers (n=1,559). T5 Which of the following best describes your approach to outdoor adventure activities gear and outfitter use on overnight trips?

"Not sure" (1%) not shown.

APPROACH TO GEAR AND OUTFITTER USE – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Younger friend groups (69%) and younger families (62%) are more likely than other traveller types to also use local outfitters or operators, while partners are more likely to use their own gear only (50%).

Approach	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
I have my own gear and do not use local outfitters or operators for supplies or services	39%	50% ▲	31% ▼	40%	28% ▼	38%
I have my own gear but also use local outfitters or operators for additional supplies or services	56%	43% ▼	62% ▲	54%	69% ▲	57%
I rely on outfitters, lodges, or operators for most knowledge, supplies, and services	5%	5%	6%	6%	3%	5%

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 outdoor adventurers (n=1,559). T5 Which of the following best describes your approach to outdoor adventure activities gear and outfitter use on overnight trips?

"Not sure" (1%) not shown.

INDEPENDENT VS. GUIDED OUTDOOR ADVENTURE – MARKET

All outdoor adventurers

Half of outdoor adventurers (52%) mainly go fully self-guided, and 45% use a mix of guided and self-guided experiences. Only 3% mainly use guided or outfitted experiences.

U.S. Drive outdoor adventurers are more likely than other markets to mix guided and self-guided experiences (48%), and Rest of Canada outdoor adventurers more likely to go fully self-guided (65%).

Approach	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
I mainly go on my own or with my own group – fully self-guided	52%	48%	65% ▲	48% ▼	45%
I use a mix of guided and self-guided	45%	50%	32% ▼	48% ▲	51%
I mainly use guided or outfitted experiences provided by operators	3%	2%	3%	3%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). T6 When you go on an outdoor adventure activities trip, do you mainly go independently or use guided/outfitted experiences?

“Not sure” (<1%) not shown.

INDEPENDENT VS. GUIDED OUTDOOR ADVENTURE – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

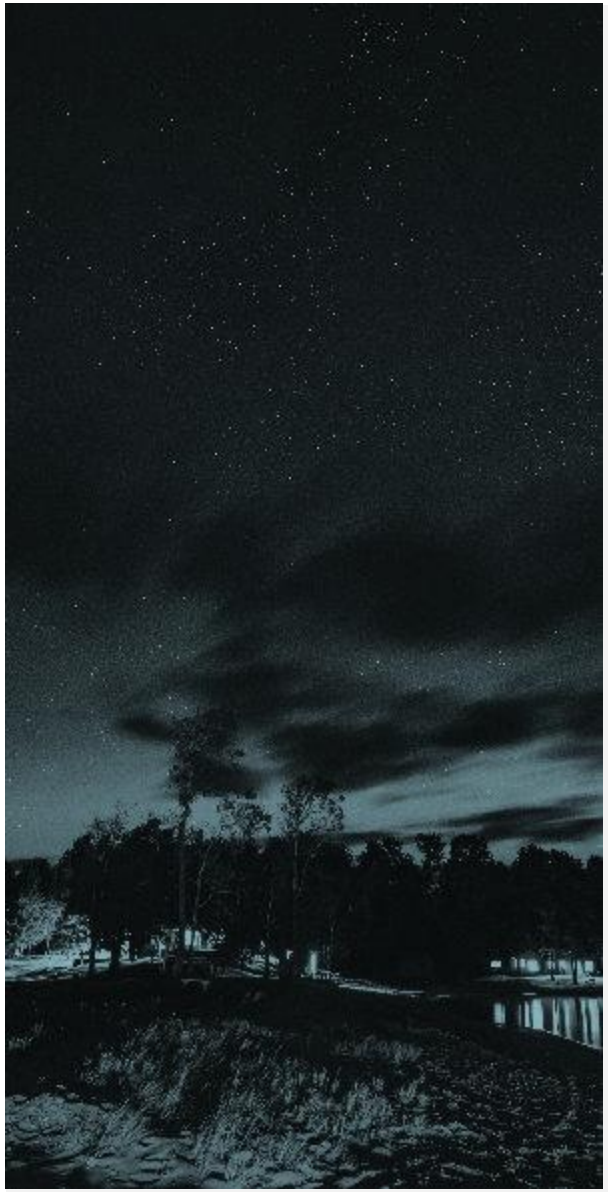
Younger friend groups (57%) and younger families (55%) are more likely than other traveller types to mix guided and self-guided experiences, while partners are more likely to go fully self-guided (64%).

Approach	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
I mainly go on my own or with my own group – fully self-guided	52%	64% ▲	41% ▼	55%	39% ▼	54%
I use a mix of guided and self-guided	45%	34% ▼	55% ▲	42%	57% ▲	43%
I mainly use guided or outfitted experiences provided by operators	3%	2%	4%	3%	3%	3%

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

Base: all outdoor adventurers (n=1,559). T6 When you go on an outdoor adventure activities trip, do you mainly go independently or use guided/outfitted experiences?

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



PLANNING & BOOKING

PLANNING LEAD TIME FOR OUTDOOR ADVENTURE TRIPS – MARKET

All outdoor adventurers

Four in ten outdoor adventurers (39%) start planning one to three months in advance and a third (36%) three to six months ahead, while 16% plan six to twelve months ahead.

None of the market differences are significant.

Lead time	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
Less than 1 month	7%	9%	7%	7%	6%
1 to 3 months	39%	43%	39%	35%	45%
3 to 6 months	36%	38%	30%	39%	31%
6 to 12 months	16%	8%	20%	16%	15%
More than 12 months in advance	2%	0%	2%	2%	3%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). B1 How far in advance do you typically start planning an outdoor adventure activities trip?

"Not sure" (1%) not shown.

PLANNING LEAD TIME FOR OUTDOOR ADVENTURE TRIPS – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Planning three to six months ahead ranges from 33% among partners to 44% among younger friend groups.

None of the traveller type differences are significant.

Lead time	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Less than 1 month	7%	6%	9%	5%	7%	6%
1 to 3 months	39%	35%	43%	38%	37%	38%
3 to 6 months	36%	33%	34%	34%	44%	38%
6 to 12 months	16%	21%	12%	18%	9%	18%
More than 12 months in advance	2%	2%	1%	4%	2%	1%

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

Base: all outdoor adventurers (n=1,559). B1 How far in advance do you typically start planning an outdoor adventure activities trip?

“Not sure” (1%) not shown.

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

All outdoor adventurers

General internet search (52%) and word of mouth (51%) are the most common sources of inspiration and planning, followed by social media content (41%), online booking or review sites (40%), official tourism websites (39%) and visitor centres (27%).

U.S. Drive outdoor adventurers are less likely than other markets to rely on word of mouth (47%), and U.S. Fly outdoor adventurers to use official tourism websites (28%).

Source	Overall (n=1,544)	Ontario (n=196)	Rest of Canada (n=389)	U.S. Drive (n=761)	U.S. Fly (n=198)
General internet search (e.g., Google, Bing)	52%	54%	56%	48%	56%
Word of mouth (e.g., friends or family)	51%	59%	57%	47% ▼	46%
Social media content (e.g., Instagram, Facebook, YouTube)	41%	38%	38%	42%	43%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	40%	40%	36%	43%	38%
Official tourism websites (e.g., national, provincial, state, regional, city)	39%	41%	45%	38%	28% ▼
Travel information centres or visitor centres	27%	26%	27%	28%	28%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,544). B4 Which of the following do you use to find inspiration or plan your outdoor adventure activities trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All outdoor adventurers

About a quarter use articles or videos (27%), AI tools (26%), TV shows or travel guides (24% each), and about a fifth outfitter websites (20%), forums (19%) or influencers (17%).

U.S. Drive outdoor adventurers are more likely than other markets to use AI tools (32%) and travel guides (28%), while Ontario outdoor adventurers are less likely to use AI tools (17%), TV shows (15%) and travel guides (13%), and Rest of Canada outdoor adventurers AI tools (17%) and influencers (11%).

Source	Overall (n=1,544)	Ontario (n=196)	Rest of Canada (n=389)	U.S. Drive (n=761)	U.S. Fly (n=198)
Articles, blogs, or videos about travel destinations	27%	24%	24%	29%	29%
AI tools (e.g., ChatGPT, Gemini, Copilot)	26%	17% ▼	17% ▼	32% ▲	29%
TV shows or documentaries	24%	15% ▼	23%	25%	32%
Magazines, travel guides or brochures	24%	13% ▼	20%	28% ▲	22%
Outfitter or lodge websites	20%	20%	19%	21%	18%
Forums or online communities	19%	19%	18%	19%	21%
Social media influencers	17%	15%	11% ▼	20%	20%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,544). B4 Which of the following do you use to find inspiration or plan your outdoor adventure activities trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All outdoor adventurers

Each remaining source is used by 16% of outdoor adventurers or fewer, led by outdoor or sporting magazines (16%).

U.S. Drive outdoor adventurers are more likely than other markets to use travel phone lines (10%), and Rest of Canada outdoor adventurers less likely (3%).

Source	Overall (n=1,544)	Ontario (n=196)	Rest of Canada (n=389)	U.S. Drive (n=761)	U.S. Fly (n=198)
Outdoor or sporting magazines or publications	16%	10%	12%	18%	20%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	12%	10%	11%	14%	10%
Travel agents	10%	12%	8%	11%	11%
Travel-related phone lines or hotlines	7%	4%	3% ▼	10% ▲	7%
Consumer shows/exhibitions	6%	8%	6%	6%	7%
Email newsletters	6%	5%	5%	7%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,544). B4 Which of the following do you use to find inspiration or plan your outdoor adventure activities trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All outdoor adventurers | Traveller types are defined on slide 10

Younger families (50%) and younger friend groups (50%) are more likely than other traveller types to use social media content.

Word of mouth ranges from 45% among younger families to 61% among older friend groups, although these differences are not significant.

Source	Overall (n=1,544)	Partners (n=291)	Younger Families (n=355)	Older Families (n=402)	Younger Friends (n=185)	Older Friends (n=232)
General internet search (e.g., Google, Bing)	52%	58%	47%	55%	45%	51%
Word of mouth (e.g., friends or family)	51%	47%	45%	56%	49%	61%
Social media content (e.g., Instagram, Facebook, YouTube)	41%	33%	50% ▲	40%	50% ▲	32%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	40%	39%	45%	43%	34%	36%
Official tourism websites (e.g., national, provincial, state, regional, city)	39%	43%	34%	43%	33%	39%
Travel information centres or visitor centres	27%	26%	24%	32%	22%	33%

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

Base: all outdoor adventurers (n=1,544). B4 Which of the following do you use to find inspiration or plan your outdoor adventure activities trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use AI tools (36%) and influencers (28%) and less likely to use travel guides (16%), while older families are more likely to use travel guides (30%), younger friend groups influencers (24%), and partners are less likely to use AI tools (18%).

Source	Overall (n=1,544)	Partners (n=291)	Younger Families (n=355)	Older Families (n=402)	Younger Friends (n=185)	Older Friends (n=232)
Articles, blogs, or videos about travel destinations	27%	23%	27%	29%	27%	32%
AI tools (e.g., ChatGPT, Gemini, Copilot)	26%	18% ▼	36% ▲	25%	30%	20%
TV shows or documentaries	24%	19%	22%	25%	27%	31%
Magazines, travel guides or brochures	24%	22%	16% ▼	30% ▲	20%	29%
Outfitter or lodge websites	20%	14%	19%	25%	16%	25%
Forums or online communities	19%	16%	20%	19%	22%	20%
Social media influencers	17%	11%	28% ▲	13%	24% ▲	11%

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

Base: all outdoor adventurers (n=1,544). B4 Which of the following do you use to find inspiration or plan your outdoor adventure activities trips? Please select all that apply.

"Not sure" (1%) not shown.

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

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to use specialized apps (16%) and travel phone lines (13%), and older families travel agents (15%), while partners are less likely to use travel agents (5%).

Source	Overall (n=1,544)	Partners (n=291)	Younger Families (n=355)	Older Families (n=402)	Younger Friends (n=185)	Older Friends (n=232)
Outdoor or sporting magazines or publications	16%	11%	18%	19%	18%	14%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	12%	9%	16% ▲	10%	17%	9%
Travel agents	10%	5% ▼	11%	15% ▲	10%	9%
Travel-related phone lines or hotlines	7%	4%	13% ▲	7%	8%	3%
Consumer shows/exhibitions	6%	6%	7%	7%	7%	7%
Email newsletters	6%	3%	7%	6%	5%	7%

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

Base: all outdoor adventurers (n=1,544). B4 Which of the following do you use to find inspiration or plan your outdoor adventure activities trips? Please select all that apply.

"Not sure" (1%) not shown.

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – MARKET

Outdoor adventurers who use social media to plan

YouTube (76%), Instagram (68%) and Facebook (66%) are the most used social media platforms for outdoor adventure information, followed by TikTok (43%) and Reddit (33%).

U.S. Drive outdoor adventurers are more likely than other markets to use X (34%), while Rest of Canada outdoor adventurers are less likely to use YouTube (67%) and X (15%).

Platform	Overall (n=709)	Ontario (n=89)	Rest of Canada (n=161)	U.S. Drive (n=363)	U.S. Fly (n=96)
YouTube	76%	78%	67% ▼	79%	80%
Instagram	68%	71%	61%	69%	74%
Facebook	66%	52%	67%	70%	58%
TikTok	43%	34%	33%	47%	52%
Reddit	33%	36%	30%	32%	44%
X (formerly known as Twitter)	26%	20%	15% ▼	34% ▲	23%
Pinterest	22%	22%	16%	22%	33%
WhatsApp	15%	22%	11%	14%	22%
Snapchat	14%	6%	7%	18%	22%
Threads	10%	11%	7%	10%	18%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who use social media to plan (B4) (n=709). B4B Which social media platforms do you use to obtain information about your outdoor adventure activities trips? Please select all that apply.

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

SOCIAL MEDIA PLATFORMS USED FOR TRIPS – TRAVELLER TYPE

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

Younger families are more likely than other traveller types to use TikTok (51%) and X (34%).

Older friend groups are the most likely to use YouTube (87%), although this difference is not significant.

Platform	Overall (n=709)	Partners (n=106)	Younger Families (n=209)	Older Families (n=180)	Younger Friends (n=104)	Older Friends (n=81)
YouTube	76%	66%	79%	75%	76%	87%
Instagram	68%	58%	73%	70%	77%	60%
Facebook	66%	56%	70%	73%	60%	56%
TikTok	43%	34%	51% ▲	42%	49%	29%
Reddit	33%	26%	40%	27%	41%	36%
X (formerly known as Twitter)	26%	25%	34% ▲	19%	33%	19%
Pinterest	22%	24%	27%	21%	15%	20%
WhatsApp	15%	11%	19%	13%	16%	16%
Snapchat	14%	9%	19%	11%	20%	9%
Threads	10%	7%	12%	12%	10%	12%

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

Base: outdoor adventurers who use social media to plan (B4) (n=709). B4B Which social media platforms do you use to obtain information about your outdoor adventure activities trips? Please select all that apply.

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

HOW OUTDOOR ADVENTURE TRIPS ARE BOOKED – MARKET

All outdoor adventurers

Six in ten outdoor adventurers book directly with accommodation providers (61%) or through an online booking platform (59%). A quarter book directly with outfitters or guides (26%) or informally through friends (24%), and a fifth through a travel agent or tour operator (19%).

None of the market differences are significant.

Booking method	Overall (n=1,541)	Ontario (n=194)	Rest of Canada (n=391)	U.S. Drive (n=760)	U.S. Fly (n=196)
Directly with accommodation providers (lodge, hotel, cottage)	61%	65%	61%	60%	59%
Through an online booking platform (e.g., Booking.com, Expedia)	59%	61%	54%	60%	65%
Directly with outfitters or guides	26%	25%	23%	27%	32%
Informally through friends or personal contacts	24%	23%	21%	26%	25%
Through a travel agent or tour operator	19%	18%	15%	21%	20%
Through a sporting or outdoor club or association	11%	11%	8%	12%	14%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,541). B2 How do you typically book your outdoor adventure activities trips? Please select all that apply.

"Not sure" (1%) not shown.

HOW OUTDOOR ADVENTURE TRIPS ARE BOOKED – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to book online (67%), directly with outfitters or guides (34%), through a travel agent (26%) or through a club (17%), while partners are less likely to book informally (14%), through a travel agent (12%) or a club (6%).

Younger friend groups are more likely to book informally through friends or personal contacts (32%).

Booking method	Overall (n=1,541)	Partners (n=291)	Younger Families (n=353)	Older Families (n=401)	Younger Friends (n=183)	Older Friends (n=236)
Directly with accommodation providers (lodge, hotel, cottage)	61%	61%	59%	65%	53%	62%
Through an online booking platform (e.g., Booking.com, Expedia)	59%	58%	67% ▲	58%	56%	51%
Directly with outfitters or guides	26%	22%	34% ▲	24%	27%	23%
Informally through friends or personal contacts	24%	14% ▼	25%	25%	32% ▲	32%
Through a travel agent or tour operator	19%	12% ▼	26% ▲	18%	22%	17%
Through a sporting or outdoor club or association	11%	6% ▼	17% ▲	11%	14%	7%

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

Base: all outdoor adventurers (n=1,541). B2 How do you typically book your outdoor adventure activities trips? Please select all that apply.

"Not sure" (1%) not shown.

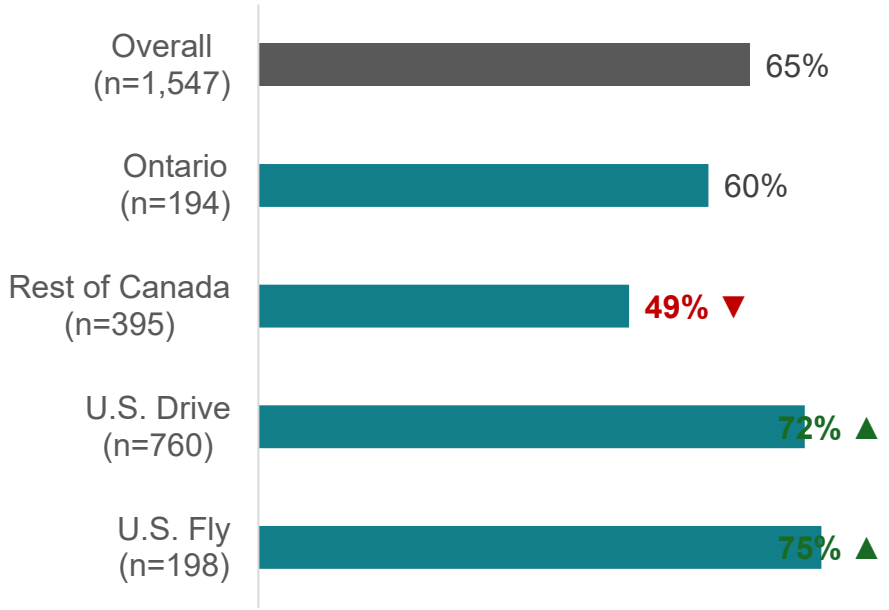
IMPORTANCE OF WORKING WITH LOCAL OPERATORS

All outdoor adventurers | Traveller types are defined on slide 10

Two-thirds of outdoor adventurers (65%) say working with a local outfitter, guide, operator or accommodation provider is important when planning a trip.

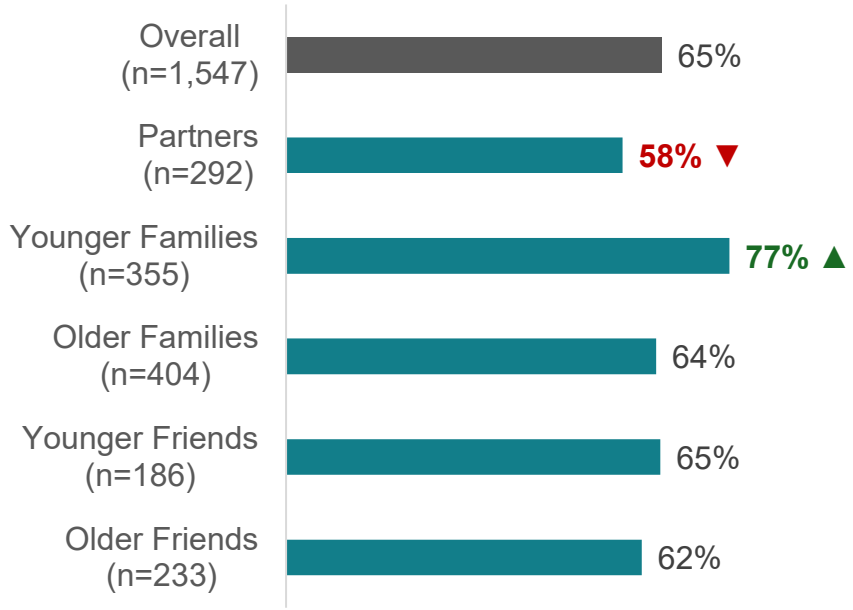
U.S. Fly (75%) and U.S. Drive outdoor adventurers (72%) are more likely than other markets to say it is important, and Rest of Canada outdoor adventurers less likely (49%). Younger families are more likely than other traveller types (77%), and partners less likely (58%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all outdoor adventurers (n=1,547). B3 (TOP2) When planning an outdoor adventure activities trip, how important is working with a local outfitter, guide, operator or accommodation provider? TOP2 = % somewhat or very important.

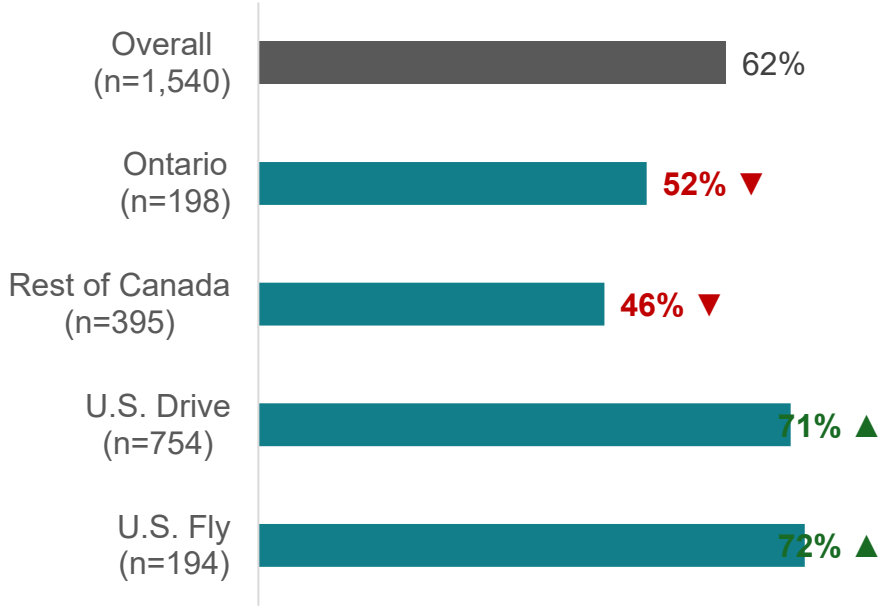
LIKELIHOOD OF USING AI TOOLS TO PLAN

All outdoor adventurers | Traveller types are defined on slide 10

Six in ten outdoor adventurers (62%) are likely to use AI tools to help plan their next outdoor adventure trip, including 28% who are very likely.

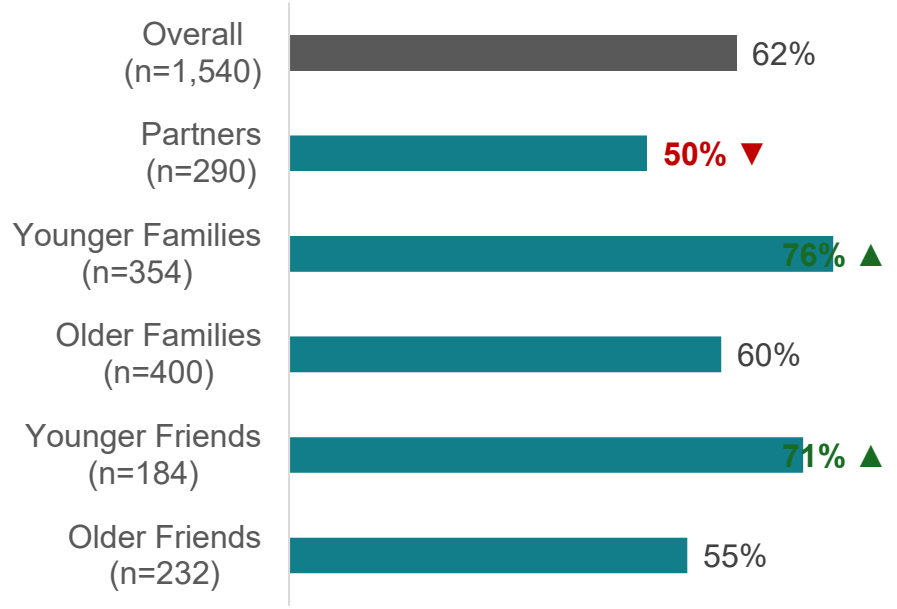
U.S. Fly (72%) and U.S. Drive outdoor adventurers (71%) are more likely than other markets to use AI tools, and Ontario (52%) and Rest of Canada outdoor adventurers (46%) less likely. Younger families (76%) and younger friend groups (71%) are more likely than other traveller types, and partners less likely (50%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all outdoor adventurers, excluding “Don’t know” (n=1,540). B5 (TOP2) How likely are you to use AI tools (e.g., ChatGPT, Google Gemini, MS Copilot) to help you plan your next outdoor adventure activities trip? TOP2 = % somewhat or very likely.



MOTIVATION & VALUES

MOTIVATIONS FOR OUTDOOR ADVENTURE TRIPS – MARKET

All outdoor adventurers

Connection with nature (68%), escape from everyday stress (67%) and experiencing new places (66%) are the leading motivations, followed by bonding with friends or family (53%), wildlife encounters (50%) and physical fitness (46%). Four in ten are motivated by thrill or adventure (42%) and solitude (37%).

Rest of Canada outdoor adventurers are more likely than other markets to be motivated by physical fitness (55%), while U.S. Drive outdoor adventurers are more motivated by tradition or cultural heritage (24%).

Motivation	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
Connection with nature and the outdoors	68%	68%	72%	67%	67%
Escape from everyday stress and routine	67%	67%	70%	65%	67%
Experiencing new places and landscapes	66%	61%	65%	67%	72%
Bonding with friends or family	53%	55%	47%	55%	56%
Wildlife encounters and natural discovery	50%	47%	49%	51%	52%
Physical fitness and health	46%	52%	55% ▲	43% ▼	40%
Thrill, challenge, or sense of adventure	42%	38%	36%	45%	48%
Solitude and personal reflection	37%	36%	39%	36%	41%
Tradition or cultural heritage related to the activity	20%	18%	13% ▼	24% ▲	20%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). M1 What are your primary motivations for taking outdoor adventure activities trips? Please select all that apply.

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

MOTIVATIONS FOR OUTDOOR ADVENTURE TRIPS – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Older families (68%) and younger families (61%) are more likely than other traveller types to be motivated by bonding, and partners less likely (33%). Older friend groups are more motivated by solitude (49%), and younger families by tradition (29%).

Partners and older families are less motivated by thrill or adventure (31% and 35%), and younger friend groups by escape (58%).

Motivation	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Connection with nature and the outdoors	68%	66%	67%	74%	63%	70%
Escape from everyday stress and routine	67%	63%	64%	71%	58% ▼	74%
Experiencing new places and landscapes	66%	62%	65%	72%	61%	69%
Bonding with friends or family	53%	33% ▼	61% ▲	68% ▲	53%	50%
Wildlife encounters and natural discovery	50%	54%	50%	48%	46%	49%
Physical fitness and health	46%	53%	42%	43%	45%	53%
Thrill, challenge, or sense of adventure	42%	31% ▼	48%	35% ▼	50%	51%
Solitude and personal reflection	37%	35%	30% ▼	37%	34%	49% ▲
Tradition or cultural heritage related to the activity	20%	11% ▼	29% ▲	18%	20%	20%

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

Base: all outdoor adventurers (n=1,559). M1 What are your primary motivations for taking outdoor adventure activities trips? Please select all that apply.

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

EXPERIENCES THAT WOULD ENHANCE A TRIP – MARKET (1 OF 3)

All outdoor adventurers

Northern Lights or dark sky viewing (57%) and scenic driving (53%) are the experiences most likely to enhance an outdoor adventure trip, followed by local markets, retail and artisans (49%), wildlife viewing (44%), culinary experiences (43%) and local breweries (32%).

None of the market differences are significant.

Experience	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
Northern Lights or dark sky viewing experiences	57%	64%	54%	59%	51%
Scenic driving or road trip components	53%	53%	58%	51%	52%
Visting local markets, retail and artisans	49%	49%	50%	47%	54%
Wildlife viewing separate from hunting or fishing	44%	43%	42%	46%	43%
Culinary experiences featuring locally sourced or freshly caught / harvested food	43%	42%	44%	42%	48%
Visiting local breweries or distilleries	32%	24%	35%	33%	32%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). M2 Beyond outdoor adventure activities 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 3)

All outdoor adventurers

About three in ten are interested in all-inclusive lodge packages (32%), wellness experiences and photography experiences (31% each), and a quarter in multi-activity packages, multi-stop itineraries (26% each) and Indigenous-led experiences (25%).

U.S. Drive outdoor adventurers are more likely than other markets to be interested in multi-activity packages (31%), and Rest of Canada outdoor adventurers less likely (20%) and less interested in photography experiences (24%).

Experience	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
All-inclusive lodge packages with guided outdoor adventure activities	32%	29%	28%	35%	32%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	31%	30%	30%	31%	35%
Photography or nature interpretation guided experiences	31%	31%	24% ▼	33%	32%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	26%	23%	20% ▼	31% ▲	25%
Multi-stop regional itineraries combining several Northern Ontario areas	26%	28%	26%	26%	27%
Indigenous-led cultural or land-based experiences	25%	20%	19%	28%	29%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). M2 Beyond outdoor adventure activities 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 (3 OF 3)

All outdoor adventurers

Learning opportunities (23%), youth or family introduction programs (16%) and organized competitions (15%) interest fewer outdoor adventurers, and only 1% prefer to focus entirely on the activity.

U.S. Drive outdoor adventurers are more likely than other markets to be interested in organized competitions (18%), and Rest of Canada outdoor adventurers less likely (9%).

Experience	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
Learning and interpretation opportunities	23%	22%	23%	23%	23%
Youth or family-oriented introduction-to-outdoor adventure activities programs	16%	17%	13%	18%	17%
Organized outdoor competitions or races (e.g., cycling race, fat bike event, paddling race)	15%	11%	9% ▼	18% ▲	17%
None – I prefer to focus entirely on the activity	1%	1%	3%	1%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). M2 Beyond outdoor adventure activities 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 3)

All outdoor adventurers | Traveller types are defined on slide 10

Older families are more likely than other traveller types to be interested in Northern Lights viewing (65%) and scenic driving (60%), and older friend groups in local breweries (43%), while younger friend groups are less interested in Northern Lights viewing (44%) and scenic driving (43%), and younger families in scenic driving (45%) and local markets (40%).

Experience	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Northern Lights or dark sky viewing experiences	57%	55%	54%	65% ▲	44% ▼	62%
Scenic driving or road trip components	53%	56%	45% ▼	60% ▲	43% ▼	57%
Visting local markets, retail and artisans	49%	48%	40% ▼	55%	45%	54%
Wildlife viewing separate from hunting or fishing	44%	41%	43%	49%	40%	46%
Culinary experiences featuring locally sourced or freshly caught / harvested food	43%	40%	44%	44%	40%	45%
Visiting local breweries or distilleries	32%	29%	27%	30%	34%	43% ▲

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

Base: all outdoor adventurers (n=1,559). M2 Beyond outdoor adventure activities 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 3)

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in wellness experiences (41%) and multi-activity packages (36%), and partners less interested in multi-activity packages (19%).

Experience	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
All-inclusive lodge packages with guided outdoor adventure activities	32%	29%	36%	36%	28%	28%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	31%	26%	41% ▲	30%	28%	28%
Photography or nature interpretation guided experiences	31%	23%	34%	36%	32%	25%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	26%	19% ▼	36% ▲	26%	29%	23%
Multi-stop regional itineraries combining several Northern Ontario areas	26%	28%	26%	25%	22%	30%
Indigenous-led cultural or land-based experiences	25%	19%	27%	28%	21%	27%

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

Base: all outdoor adventurers (n=1,559). M2 Beyond outdoor adventure activities 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 (3 OF 3)

All outdoor adventurers | Traveller types are defined on slide 10

Younger families (32%) and older families (22%) are more likely than other traveller types to be interested in youth or family introduction programs, while partners (2%) and older friend groups (6%) are less interested; younger families are also more interested in organized competitions (23%), and partners less (7%).

Experience	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Learning and interpretation opportunities	23%	20%	24%	24%	20%	24%
Youth or family-oriented introduction-to-outdoor adventure activities programs	16%	2% ▼	32% ▲	22% ▲	14%	6% ▼
Organized outdoor competitions or races (e.g., cycling race, fat bike event, paddling race)	15%	7% ▼	23% ▲	13%	19%	15%
None – I prefer to focus entirely on the activity	1%	2%	1%	1%	2%	2%

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

Base: all outdoor adventurers (n=1,559). M2 Beyond outdoor adventure activities 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 2)

Outdoor adventurers who provided a response

When asked what makes an outdoor adventure trip successful, half of outdoor adventurers mention fun and enjoyment (53%), followed by connection with nature (37%), accommodation and food (25%), relaxation (24%) and quality time with family and friends (23%).

U.S. Drive outdoor adventurers are more likely than other markets to mention fun and enjoyment (60%), and Ontario outdoor adventurers accommodation and food (35%).

Theme	Overall (n=1,489)	Ontario (n=190)	Rest of Canada (n=383)	U.S. Drive (n=729)	U.S. Fly (n=187)
Fun & Enjoyment	53%	46%	44% ▼	60% ▲	54%
Connection with Nature & Scenery	37%	39%	31%	39%	40%
Accommodation & Food	25%	35% ▲	25%	23%	20%
Relaxation & Stress Relief	24%	27%	26%	21%	26%
Quality Time with Family & Friends	23%	23%	20%	23%	26%
Physical Activity & Exercise	17%	23%	15%	16%	17%
New Experiences & Exploration	12%	8%	13%	12%	18%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who provided a response (n=1,489). M3 In your own words, what makes an outdoor adventure activities trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

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

Outdoor adventurers who provided a response

Around one in ten mention safety, mental wellness, planning or good weather (9% to 12%), and 17% give an overall positive or general response.

U.S. Drive outdoor adventurers are more likely than other markets to mention safety (15%), and Ontario outdoor adventurers good weather (18%).

Theme	Overall (n=1,489)	Ontario (n=190)	Rest of Canada (n=383)	U.S. Drive (n=729)	U.S. Fly (n=187)
Safety & No Incidents	12%	9%	8%	15% ▲	12%
Mental Wellness / Disconnecting from Daily Life	11%	12%	15%	9%	12%
Planning & Organization	10%	10%	6%	11%	10%
Good Weather	9%	18% ▲	12%	7%	4%
Affordability & Value for Money	4%	6%	3%	3%	4%
Successful Harvest / Catching Fish or Game	2%	2%	2%	2%	3%
Overall Positive / General Satisfaction	17%	11%	12%	19%	22%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who provided a response (n=1,489). M3 In your own words, what makes an outdoor adventure activities trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

WHAT MAKES A TRIP SUCCESSFUL – TRAVELLER TYPE (1 OF 2)

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

Younger families are more likely than other traveller types to mention fun and enjoyment (60%), and older families quality time with family and friends (32%), while partners are more likely to mention relaxation (32%).

Theme	Overall (n=1,489)	Partners (n=286)	Younger Families (n=341)	Older Families (n=382)	Younger Friends (n=178)	Older Friends (n=226)
Fun & Enjoyment	53%	38% ▼	60% ▲	56%	62%	53%
Connection with Nature & Scenery	37%	34%	36%	34%	44%	39%
Accommodation & Food	25%	25%	22%	24%	28%	28%
Relaxation & Stress Relief	24%	32% ▲	20%	21%	18%	24%
Quality Time with Family & Friends	23%	13% ▼	25%	32% ▲	22%	20%
Physical Activity & Exercise	17%	17%	19%	13%	18%	18%
New Experiences & Exploration	12%	9%	12%	13%	13%	14%

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

Base: outdoor adventurers who provided a response (n=1,489). M3 In your own words, what makes an outdoor adventure activities trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

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

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

Younger families are more likely than other traveller types to mention planning and organization (15%).

Each remaining theme is mentioned by 18% or fewer in every traveller type.

Theme	Overall (n=1,489)	Partners (n=286)	Younger Families (n=341)	Older Families (n=382)	Younger Friends (n=178)	Older Friends (n=226)
Safety & No Incidents	12%	8%	14%	13%	14%	13%
Mental Wellness / Disconnecting from Daily Life	11%	15%	8%	10%	8%	14%
Planning & Organization	10%	5%	15% ▲	10%	10%	7%
Good Weather	9%	10%	7%	10%	9%	14%
Affordability & Value for Money	4%	2%	4%	3%	4%	4%
Successful Harvest / Catching Fish or Game	2%	1%	2%	2%	3%	4%
Overall Positive / General Satisfaction	17%	13%	24% ▲	16%	19%	11%

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

Base: outdoor adventurers who provided a response (n=1,489). M3 In your own words, what makes an outdoor adventure activities trip successful for you? Coded open-ended responses; more than one theme could be coded per response.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – MARKET (1 OF 2)

Outdoor adventurers who provided a response

Outdoor adventurers see Northern Ontario's vast, untouched wilderness (42%) as its greatest advantage, followed by its lakes, rivers and water access (26%), its scenery (24%) and being less crowded (20%).

Ontario outdoor adventurers are the most likely to mention lakes and water access (36%), although market differences are not significant.

Advantage	Overall (n=1,303)	Ontario (n=164)	Rest of Canada (n=329)	U.S. Drive (n=640)	U.S. Fly (n=170)
Vast, Untouched Wilderness & Nature	42%	46%	36%	46%	36%
Abundance of Lakes, Rivers & Water Access	26%	36%	24%	24%	28%
Beautiful Scenery & Landscapes	24%	28%	21%	26%	20%
Less Crowded / Solitude	20%	14%	19%	21%	24%
Great Fishing Opportunities	15%	16%	12%	16%	12%
Authenticity & Unique Experience	12%	13%	10%	12%	15%
Unfamiliar / Open to Discovering	9%	7%	13%	8%	11%
Proximity / Accessibility from Home	9%	13%	12%	6%	9%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who provided a response (n=1,303). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for outdoor adventure activities trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

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

Outdoor adventurers who provided a response

Each of the remaining advantages is mentioned by fewer than one in ten outdoor adventurers.

None of the market differences are significant.

Advantage	Overall (n=1,303)	Ontario (n=164)	Rest of Canada (n=329)	U.S. Drive (n=640)	U.S. Fly (n=170)
Great Hunting Opportunities	6%	9%	4%	7%	2%
Wide Range of Outdoor Activities	6%	6%	6%	5%	6%
Friendly Locals & Hospitality	4%	1%	5%	4%	2%
Northern Lights	4%	5%	2%	5%	2%
Affordable / Good Value	2%	3%	4%	2%	0%
Cultural & Indigenous Heritage	2%	2%	2%	2%	4%
Wildlife Viewing & Biodiversity	2%	3%	1%	1%	3%
Dark Skies & Stargazing	1%	2%	<1%	<1%	<1%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who provided a response (n=1,303). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for outdoor adventure activities trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

NORTHERN ONTARIO'S GREATEST ADVANTAGE – TRAVELLER TYPE (1 OF 2)

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

Wilderness is the top advantage for every traveller type, from 38% among partners and older friend groups to 49% among younger friend groups.

None of the traveller type differences are significant.

Advantage	Overall (n=1,303)	Partners (n=231)	Younger Families (n=295)	Older Families (n=350)	Younger Friends (n=164)	Older Friends (n=192)
Vast, Untouched Wilderness & Nature	42%	38%	41%	44%	49%	38%
Abundance of Lakes, Rivers & Water Access	26%	26%	22%	29%	27%	28%
Beautiful Scenery & Landscapes	24%	19%	24%	25%	27%	25%
Less Crowded / Solitude	20%	19%	22%	19%	19%	22%
Great Fishing Opportunities	15%	11%	15%	17%	20%	15%
Authenticity & Unique Experience	12%	11%	14%	10%	16%	9%
Unfamiliar / Open to Discovering	9%	11%	10%	11%	8%	4%
Proximity / Accessibility from Home	9%	9%	7%	10%	8%	9%

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

Base: outdoor adventurers who provided a response (n=1,303). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for outdoor adventure activities trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

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

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

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

None of the traveller type differences are significant.

Advantage	Overall (n=1,303)	Partners (n=231)	Younger Families (n=295)	Older Families (n=350)	Younger Friends (n=164)	Older Friends (n=192)
Great Hunting Opportunities	6%	5%	2%	7%	6%	10%
Wide Range of Outdoor Activities	6%	4%	6%	6%	7%	7%
Friendly Locals & Hospitality	4%	5%	4%	4%	3%	4%
Northern Lights	4%	3%	4%	4%	3%	4%
Affordable / Good Value	2%	4%	2%	2%	<1%	4%
Cultural & Indigenous Heritage	2%	3%	3%	1%	3%	1%
Wildlife Viewing & Biodiversity	2%	1%	1%	2%	2%	2%
Dark Skies & Stargazing	1%	<1%	<1%	0%	2%	2%

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

Base: outdoor adventurers who provided a response (n=1,303). M4 In your own words, what do you think is Northern Ontario's greatest advantage as a destination for outdoor adventure activities trips, compared to other places you could go? Coded open-ended responses; more than one theme could be coded per response.

MEANING OF SUSTAINABLE TOURISM – MARKET (1 OF 2)

Outdoor adventurers who provided a response

Outdoor adventurers most often describe sustainable tourism as environmental protection and minimal impact (39%), followed by preservation for future generations (19%) and support for local communities (11%).

None of the market differences are significant.

Meaning	Overall (n=1,553)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=756)	U.S. Fly (n=198)
Environmental Protection & Minimal Impact	39%	41%	42%	37%	42%
Preservation for Future Generations	19%	19%	18%	19%	23%
Support for Local Communities & Economy	11%	9%	11%	10%	14%
Respecting Wildlife & Natural Habitats	8%	9%	8%	8%	3%
Leave No Trace / Leave It As You Found It	8%	12%	8%	6%	8%
Tourism That Sustains Itself / Repeat Visitation	7%	8%	6%	8%	6%
Responsible Travel Behaviour	6%	4%	10%	5%	5%
Balancing Tourism & Conservation	5%	3%	5%	6%	3%
Reducing Waste & Pollution	5%	7%	3%	5%	4%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who provided a response (n=1,553). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

MEANING OF SUSTAINABLE TOURISM – MARKET (2 OF 2)

Outdoor adventurers who provided a response

Each remaining theme is mentioned by 4% of outdoor adventurers or fewer, while 18% give a general or vague response and 28% are unsure or give another response.

None of the market differences are significant.

Meaning	Overall (n=1,553)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=756)	U.S. Fly (n=198)
Cultural Respect & Indigenous Communities	4%	6%	3%	3%	4%
Eco-Friendly Practices & Green Transport	3%	3%	4%	3%	4%
Nature-Based / Immersive Experience	1%	<1%	1%	1%	<1%
Accessible & Inclusive Tourism	1%	0%	1%	1%	1%
Cleanliness & Well-Maintained Destinations	1%	1%	1%	1%	<1%
Safety & Security for Tourists	<1%	<1%	<1%	<1%	1%
General Awareness / Vague Positive	18%	17%	19%	17%	19%
Negative Sentiment / Dismissive	1%	0%	1%	1%	0%
Gibberish / Incomprehensible	1%	2%	1%	1%	1%
Unsure / Other	28%	20%	24%	31%	31%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who provided a response (n=1,553). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

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

Environmental protection is the most common description for every traveller type, from 36% among younger families to 45% among partners.

None of the traveller type differences are significant.

Meaning	Overall (n=1,553)	Partners (n=293)	Younger Families (n=355)	Older Families (n=403)	Younger Friends (n=185)	Older Friends (n=235)
Environmental Protection & Minimal Impact	39%	45%	36%	38%	38%	39%
Preservation for Future Generations	19%	21%	21%	20%	18%	15%
Support for Local Communities & Economy	11%	11%	10%	11%	7%	14%
Respecting Wildlife & Natural Habitats	8%	9%	8%	9%	7%	6%
Leave No Trace / Leave It As You Found It	8%	10%	7%	9%	7%	7%
Tourism That Sustains Itself / Repeat Visitation	7%	8%	8%	6%	7%	7%
Responsible Travel Behaviour	6%	8%	5%	7%	6%	5%
Balancing Tourism & Conservation	5%	7%	5%	5%	3%	3%
Reducing Waste & Pollution	5%	3%	6%	7%	4%	3%

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

Base: outdoor adventurers who provided a response (n=1,553). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

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

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

Unsure or other responses range from 26% among older families to 30% among younger families and younger friend groups.

None of the traveller type differences are significant.

Meaning	Overall (n=1,553)	Partners (n=293)	Younger Families (n=355)	Older Families (n=403)	Younger Friends (n=185)	Older Friends (n=235)
Cultural Respect & Indigenous Communities	4%	6%	2%	2%	4%	6%
Eco-Friendly Practices & Green Transport	3%	3%	3%	4%	5%	3%
Nature-Based / Immersive Experience	1%	1%	<1%	2%	1%	0%
Accessible & Inclusive Tourism	1%	<1%	1%	1%	1%	<1%
Cleanliness & Well-Maintained Destinations	1%	1%	1%	<1%	<1%	1%
Safety & Security for Tourists	<1%	<1%	1%	1%	<1%	0%
General Awareness / Vague Positive	18%	20%	17%	17%	17%	16%
Negative Sentiment / Dismissive	1%	1%	1%	1%	<1%	2%
Gibberish / Incomprehensible	1%	1%	2%	1%	1%	<1%
Unsure / Other	28%	27%	30%	26%	30%	29%

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

Base: outdoor adventurers who provided a response (n=1,553). V0 In your own words, what does sustainable tourism mean? Coded open-ended responses; more than one theme could be coded per response.

IMPORTANCE OF SUSTAINABILITY CONSIDERATIONS – MARKET

All outdoor adventurers

Supporting local, independently owned businesses (88%), conservation (87%), minimal environmental impact and community benefit (86% each) are important considerations for most outdoor adventurers when choosing a destination.

U.S. Drive and U.S. Fly outdoor adventurers are more likely than other markets to value learning about Indigenous culture (81% each), and Ontario (56%) and Rest of Canada outdoor adventurers (51%) less likely; U.S. Drive outdoor adventurers also value accessibility more (70%).

Consideration	Overall (n=1,553)	Ontario (n=198)	Rest of Canada (n=400)	U.S. Drive (n=760)	U.S. Fly (n=198)
Supporting local, independently owned businesses	88%	83%	86%	89%	93%
Conservation and responsible resource management	87%	82%	86%	88%	91%
Minimal environmental impact of tourism in the area	86%	82%	85%	86%	90%
Community benefit – tourism dollars staying in the local community	86%	83%	86%	86%	88%
Learning about Indigenous culture and history	70%	56% ▼	51% ▼	81% ▲	81% ▲
Accessibility for people with mobility or physical needs	64%	55%	55% ▼	70% ▲	70%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,547 to 1,553). 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 outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to value learning about Indigenous culture (78%) and accessibility (73%), and partners less likely (56% and 49%).

Consideration	Overall (n=1,553)	Partners (n=295)	Younger Families (n=355)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Supporting local, independently owned businesses	88%	86%	89%	87%	88%	92%
Conservation and responsible resource management	87%	83%	90%	88%	85%	91%
Minimal environmental impact of tourism in the area	86%	88%	86%	83%	87%	89%
Community benefit – tourism dollars staying in the local community	86%	87%	88%	85%	84%	85%
Learning about Indigenous culture and history	70%	56% ▼	78% ▲	72%	71%	73%
Accessibility for people with mobility or physical needs	64%	49% ▼	73% ▲	68%	69%	58%

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

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,547 to 1,553). V1 (TOP2) How important are each of the following considerations when choosing a travel destination? (flattened) TOP2 = % somewhat or very important.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (1 OF 2)

All outdoor adventurers

Nine in ten outdoor adventurers (91%) feel a personal responsibility to protect the environments they visit, and eight in ten are interested in contributing to wildlife conservation (79%) or accept visible sustainable practices from uncertified operators (78%). Seven in ten (71%) would be interested in an Indigenous-led experience.

U.S. Drive and U.S. Fly outdoor adventurers are more likely than other markets to be interested in an Indigenous-led experience (79% and 84%), while Ontario outdoor adventurers are less interested in it (61%), wildlife conservation (71%) and visible sustainable practices (70%), and Rest of Canada outdoor adventurers in Indigenous-led experiences (55%).

Statement	Overall (n=1,554)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=760)	U.S. Fly (n=198)
I feel a personal responsibility to protect natural environments I visit	91%	90%	90%	92%	93%
I am interested in contributing to wildlife conservation when I travel	79%	71% ▼	75%	81%	84%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	78%	70% ▼	76%	81%	81%
I would be interested in an Indigenous-led guided experience	71%	61% ▼	55% ▼	79% ▲	84% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,540 to 1,554). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

ATTITUDES TOWARD SUSTAINABLE TRAVEL – MARKET (2 OF 2)

All outdoor adventurers

About two-thirds would pay more for a trip with a clear conservation benefit (68%) or seek out eco-friendly options (66%), and 62% look for certified accommodation or operators.

U.S. Drive outdoor adventurers are more likely than other markets to agree with each statement on this slide (68% to 74%), and Rest of Canada outdoor adventurers less likely (51% to 56%).

Statement	Overall (n=1,554)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=760)	U.S. Fly (n=198)
I would pay more for a trip that had a clear conservation benefit	68%	68%	55% ▼	74% ▲	76%
I actively seek out eco-friendly or sustainable travel options	66%	64%	56% ▼	71% ▲	71%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	62%	57%	51% ▼	68% ▲	68%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,540 to 1,554). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

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

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to be interested in contributing to wildlife conservation (87%) and an Indigenous-led experience (82%), and partners less likely (71% and 60%).

Statement	Overall (n=1,554)	Partners (n=295)	Younger Families (n=355)	Older Families (n=403)	Younger Friends (n=186)	Older Friends (n=237)
I feel a personal responsibility to protect natural environments I visit	91%	89%	93%	92%	87%	96%
I am interested in contributing to wildlife conservation when I travel	79%	71% ▼	87% ▲	79%	78%	80%
If a certified operator is not available, visible sustainable practices are enough for me (e.g., recycling, local food sourcing, conservation partnerships)	78%	73%	82%	79%	79%	81%
I would be interested in an Indigenous-led guided experience	71%	60% ▼	82% ▲	70%	77%	70%

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

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,540 to 1,554). V2 (TOP2) To what extent do you agree or disagree with the following statements? (flattened) TOP2 = % somewhat or strongly agree.

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

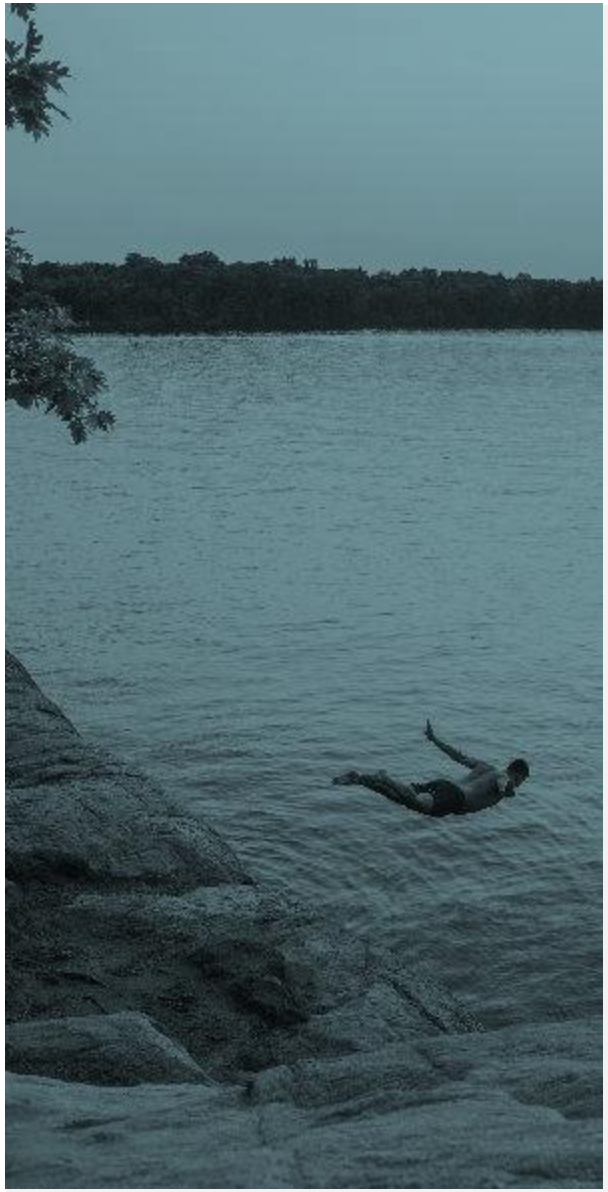
All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to agree with each statement on this slide (75% to 79%), and younger friend groups to look for certified operators (70%), while partners are less likely to pay more (60%) or look for certified operators (50%) and older families to seek out eco-friendly options (60%).

Statement	Overall (n=1,554)	Partners (n=295)	Younger Families (n=355)	Older Families (n=403)	Younger Friends (n=186)	Older Friends (n=237)
I would pay more for a trip that had a clear conservation benefit	68%	60% ▼	79% ▲	69%	71%	65%
I actively seek out eco-friendly or sustainable travel options	66%	61%	79% ▲	60% ▼	70%	65%
I actively look for accommodation or operators that hold a recognized environmental or sustainability certification	62%	50% ▼	75% ▲	62%	70% ▲	54%

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

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,540 to 1,554). 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

Outdoor adventurers who do not live in Northern Ontario

Three-quarters of outdoor adventurers know a lot (25%) or a little (53%) about Northern Ontario, while 19% have heard of it but know nothing about it and 3% have never heard of it.

Ontario outdoor adventurers are more likely than other markets to know a lot (32%), and Rest of Canada outdoor adventurers less likely (17%) and more likely to know nothing (24%) or never to have heard of it (6%).

Awareness	Overall (n=1,552)	Ontario (n=191)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
I have heard of and know a lot about it	25%	32% ▲	17% ▼	27%	25%
I have heard of and know a little bit about it	53%	56%	54%	51%	55%
I have heard of but know nothing about it	19%	11% ▼	24% ▲	19%	17%
I have never heard of before	3%	0% ▼	6% ▲	3%	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who do not live in Northern Ontario (n=1,552). N0 How would you best describe your awareness of Northern Ontario?

AWARENESS OF NORTHERN ONTARIO – TRAVELLER TYPE

Outdoor adventurers 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 (41%), while partners (15%) and older families (16%) are less likely and more likely to know nothing about it (26% and 25%).

Awareness	Overall (n=1,552)	Partners (n=293)	Younger Families (n=354)	Older Families (n=403)	Younger Friends (n=186)	Older Friends (n=236)
I have heard of and know a lot about it	25%	15% ▼	41% ▲	16% ▼	27%	25%
I have heard of and know a little bit about it	53%	53%	47% ▼	57%	55%	56%
I have heard of but know nothing about it	19%	26% ▲	10% ▼	25% ▲	16%	17%
I have never heard of before	3%	5% ▲	3%	2%	2%	2%

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

Base: outdoor adventurers who do not live in Northern Ontario (n=1,552). N0 How would you best describe your awareness of Northern Ontario?

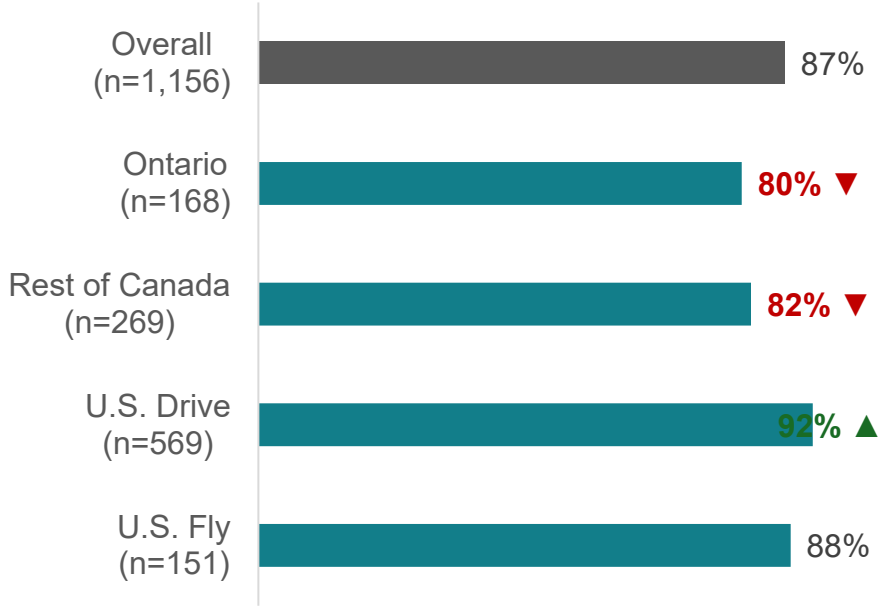
RATING OF NORTHERN ONTARIO FOR OUTDOOR ADVENTURE

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

Close to nine in ten outdoor adventurers who know Northern Ontario (87%) rate it 4 or 5 out of 5 as a pleasure travel destination for outdoor adventure, including 42% who rate it excellent.

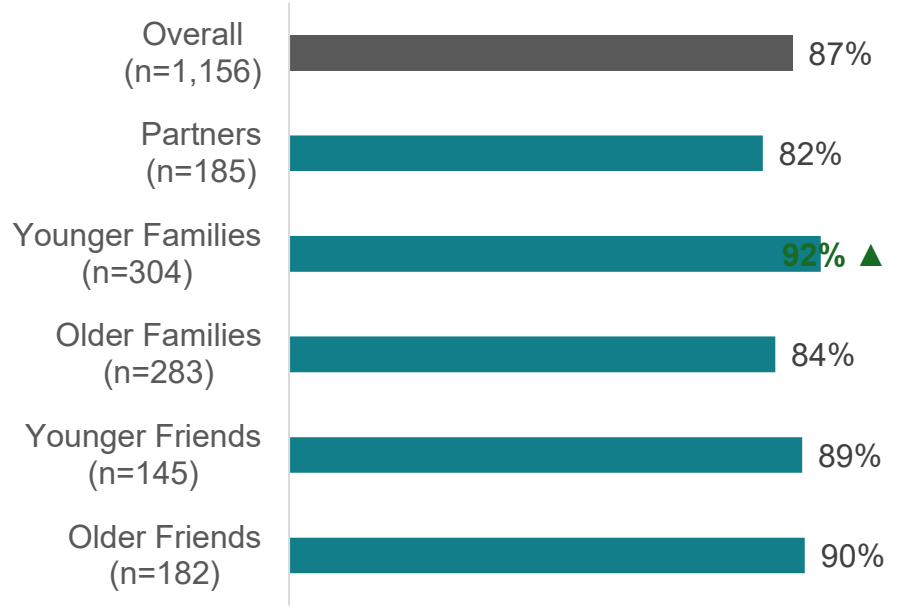
U.S. Drive outdoor adventurers rate it higher than other markets (92%), and Ontario (80%) and Rest of Canada outdoor adventurers (82%) lower. Younger families rate it higher than other traveller types (92%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: outdoor adventurers who know a lot or a little about Northern Ontario, excluding “Don’t know” (n=1,156). N1 (TOP2) How would you rate Northern Ontario as a pleasure travel destination for outdoor adventure activities? TOP2 = % rating 4 or 5 (1 = Poor, 5 = Excellent).

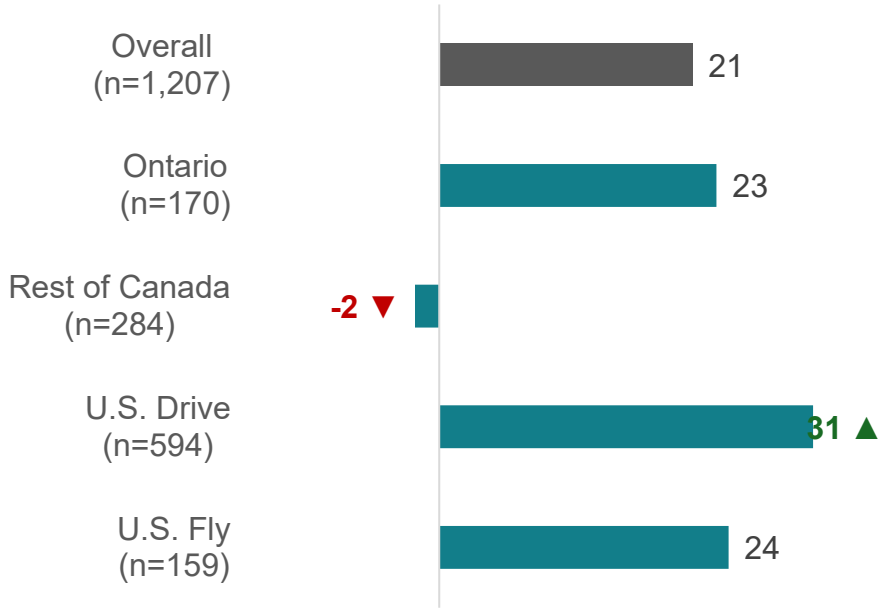
LIKELIHOOD TO RECOMMEND NORTHERN ONTARIO (NPS)

Outdoor adventurers 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 21 among outdoor adventurers who know it, with 41% promoters.

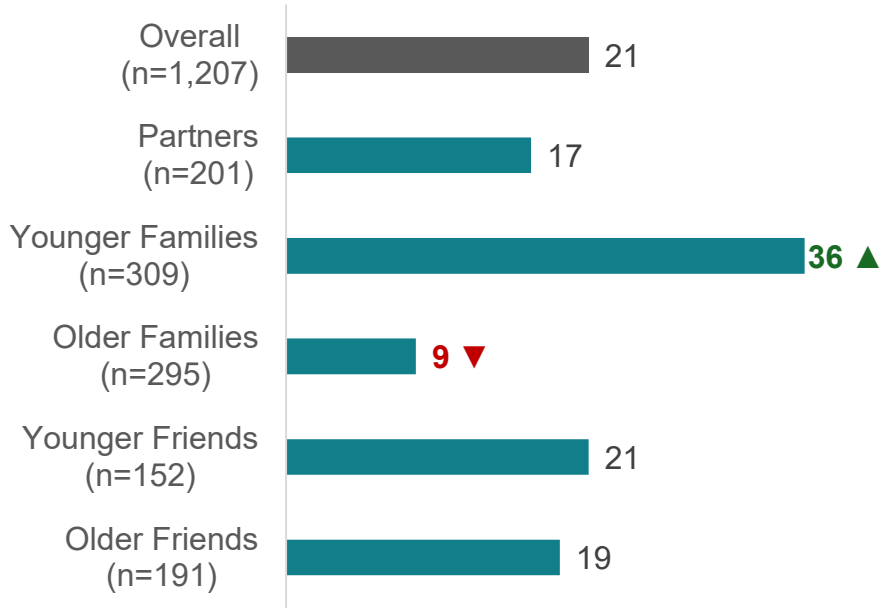
U.S. Drive outdoor adventurers give a higher score than other markets (31), and Rest of Canada outdoor adventurers a lower score (-2). Younger families give a higher score than other traveller types (36), and older families a lower one (9).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: outdoor adventurers who know a lot or a little about Northern Ontario (n=1,207). N2 (NPS) How likely would you be to recommend Northern Ontario to a friend or colleague as a destination for outdoor adventure activities? (0 = Not at all likely, 10 = Extremely likely) NPS = % promoters (9–10) minus % detractors (0–6).

PERCEPTIONS OF NORTHERN ONTARIO – MARKET

Outdoor adventurers who know a lot or a little about Northern Ontario

Nine in ten outdoor adventurers who know Northern Ontario agree it offers a wide variety of outdoor adventure activities (93%) and excellent experiences (92%), and 88% find it welcoming and would seriously consider it. Fewer know enough to plan a trip (73%) or say it is better than alternatives closer to home (67%).

U.S. Drive outdoor adventurers are more likely than other markets to agree with every statement, and Rest of Canada outdoor adventurers less likely, most notably that Northern Ontario is better than alternatives closer to home (44%).

Statement	Overall (n=1,198)	Ontario (n=170)	Rest of Canada (n=280)	U.S. Drive (n=589)	U.S. Fly (n=159)
Northern Ontario offers a wide variety of outdoor adventure activities experiences	93%	92%	86% ▼	95% ▲	96%
Northern Ontario offers excellent outdoor adventure activities experiences	92%	90%	86% ▼	95% ▲	93%
Northern Ontario feels welcoming to travellers like me	88%	89%	79% ▼	92% ▲	89%
Northern Ontario is a destination I would seriously consider for outdoor adventure activities	88%	91%	77% ▼	91% ▲	90%
I know enough about Northern Ontario to plan an outdoor adventure activities trip there	73%	69%	67%	78% ▲	72%
For outdoor adventure activities, Northern Ontario is better than alternatives I could choose closer to home	67%	71%	44% ▼	77% ▲	70%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=1,171 to 1,198). 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

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

Younger families are more likely than other traveller types to know enough to plan a trip (82%) and to say Northern Ontario is better than alternatives (77%), while partners are less likely to find it welcoming (81%), consider it (81%) or know enough to plan (64%).

Statement	Overall (n=1,198)	Partners (n=198)	Younger Families (n=306)	Older Families (n=293)	Younger Friends (n=151)	Older Friends (n=190)
Northern Ontario offers a wide variety of outdoor adventure activities experiences	93%	89%	94%	93%	94%	94%
Northern Ontario offers excellent outdoor adventure activities experiences	92%	87%	93%	92%	91%	95%
Northern Ontario feels welcoming to travellers like me	88%	81% ▼	91%	85%	91%	90%
Northern Ontario is a destination I would seriously consider for outdoor adventure activities	88%	81% ▼	91%	84%	93%	92%
I know enough about Northern Ontario to plan an outdoor adventure activities trip there	73%	64% ▼	82% ▲	69%	79%	71%
For outdoor adventure activities, Northern Ontario is better than alternatives I could choose closer to home	67%	60%	77% ▲	62%	75%	63%

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

Base: outdoor adventurers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=1,171 to 1,198). 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

Outdoor adventurers who know a lot or a little about Northern Ontario

Outdoor adventurers who know Northern Ontario agree it has pristine lakes and waterways and authentic campfire and wilderness experiences (94% each), dark skies (92%), remote wilderness (90%) and world-class outdoor adventure opportunities (89%). Rich Indigenous culture and good value for money are rated lowest (84% each).

U.S. Drive outdoor adventurers are more likely than other markets to agree on Northern Lights opportunities (91%), Indigenous culture (89%) and good value (89%), and Rest of Canada outdoor adventurers less likely to agree on Indigenous culture (77%) and value (73%).

Northern Ontario has…	Overall (n=1,186)	Ontario (n=169)	Rest of Canada (n=277)	U.S. Drive (n=586)	U.S. Fly (n=156)
Pristine lakes and waterways	94%	93%	93%	95%	95%
Authentic campfire and wilderness experiences	94%	93%	93%	95%	94%
Dark skies ideal for stargazing	92%	95%	90%	92%	91%
Remote, untouched wilderness	90%	92%	87%	90%	92%
World-class outdoor adventure opportunities	89%	84%	83%	91%	93%
Small, welcoming communities	88%	86%	83%	90%	90%
Opportunities to see the Northern Lights (Aurora Borealis)	88%	84%	84%	91% ▲	84%
Rich Indigenous culture and heritage	84%	80%	77% ▼	89% ▲	85%
Good value for money	84%	84%	73% ▼	89% ▲	84%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=1,148 to 1,186). 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

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

Each attribute is rated highly by every traveller type.

None of the traveller type differences are significant.

Northern Ontario has…	Overall (n=1,186)	Partners (n=192)	Younger Families (n=307)	Older Families (n=291)	Younger Friends (n=150)	Older Friends (n=189)
Pristine lakes and waterways	94%	95%	93%	95%	93%	95%
Authentic campfire and wilderness experiences	94%	90%	94%	95%	93%	97%
Dark skies ideal for stargazing	92%	92%	92%	91%	90%	94%
Remote, untouched wilderness	90%	89%	88%	89%	90%	95%
World-class outdoor adventure opportunities	89%	90%	90%	89%	84%	91%
Small, welcoming communities	88%	87%	90%	87%	87%	90%
Opportunities to see the Northern Lights (Aurora Borealis)	88%	85%	89%	86%	89%	88%
Rich Indigenous culture and heritage	84%	76%	87%	85%	82%	89%
Good value for money	84%	75%	89%	83%	89%	83%

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

Base: outdoor adventurers who know a lot or a little about Northern Ontario, excluding “Don’t know”; bases vary by item (n=1,148 to 1,186). 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.



FUTURE DEMAND & EXPERIENCES

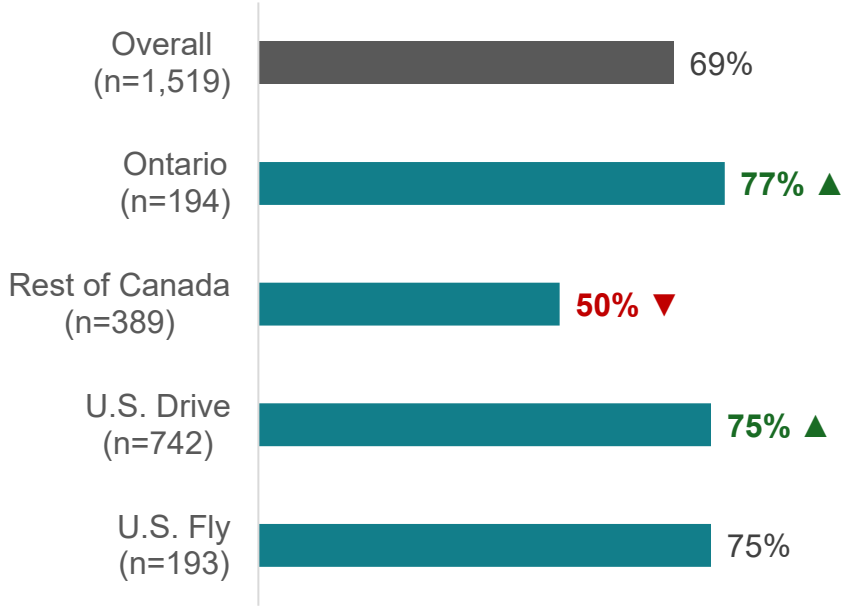
LIKELIHOOD TO VISIT NORTHERN ONTARIO IN THE NEXT 2 YEARS

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

Seven in ten outdoor adventurers (69%) are likely to visit Northern Ontario for an outdoor adventure trip in the next two years, including 37% who are very likely.

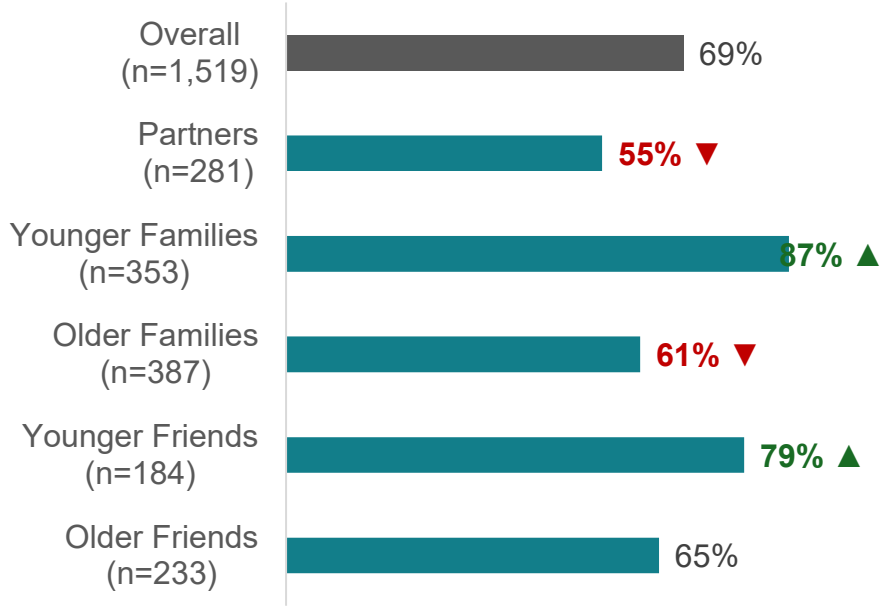
Ontario (77%) and U.S. Drive outdoor adventurers (75%) are more likely than other markets to visit, and Rest of Canada outdoor adventurers less likely (50%). Younger families (87%) and younger friend groups (79%) are more likely than other traveller types to visit, and partners (55%) and older families (61%) less likely.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all outdoor adventurers, excluding “Don’t know” (n=1,519). N4 (TOP2) How likely are you to visit Northern Ontario for an outdoor adventure activities trip in the next 2 years? TOP2 = % somewhat or very likely.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – MARKET

All outdoor adventurers | Includes past visitors to Northern Ontario

Three-quarters of outdoor adventurers would make Northern Ontario the only destination (26%) or the primary destination with brief stops elsewhere (47%) of a trip, while 18% see it as one of several equal destinations.

Rest of Canada outdoor adventurers are less likely than other markets to make it the only (19%) or primary destination (38%), and more likely to see it as a secondary stop (11%).

Role of Northern Ontario	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
It would be the only destination of the trip	26%	28%	19% ▼	28%	32%
It would be the primary destination, with brief stops elsewhere	47%	49%	38% ▼	50% ▲	46%
It would be one of several equal destinations	18%	18%	23%	16%	17%
It would be a secondary stop on a trip focused elsewhere	4%	<1%	11% ▲	2% ▼	2%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). N5 If you were to visit Northern Ontario for outdoor adventure activities, which of the following best describes the role it would play in your trip?

"Not sure" (5%) not shown.

ROLE OF NORTHERN ONTARIO IN A FUTURE TRIP – TRAVELLER TYPE

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

Partners are less likely than other traveller types to make Northern Ontario the primary destination (37%), and younger families less likely to see it as a secondary stop (2%).

Role of Northern Ontario	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
It would be the only destination of the trip	26%	26%	30%	25%	25%	22%
It would be the primary destination, with brief stops elsewhere	47%	37% ▼	50%	47%	49%	54%
It would be one of several equal destinations	18%	22%	15%	19%	18%	17%
It would be a secondary stop on a trip focused elsewhere	4%	6%	2% ▼	5%	6%	2%

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

Base: all outdoor adventurers (n=1,559). N5 If you were to visit Northern Ontario for outdoor adventure activities, which of the following best describes the role it would play in your trip?

"Not sure" (5%) not shown.

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

All outdoor adventurers | Includes past visitors to Northern Ontario

Access to nature (93%), safety and reliability and the quality of outdoor terrain and trails (92% each) are the most important factors in deciding to visit Northern Ontario for outdoor adventure, followed by the variety of activities (89%), cost, travel time, getting away from it all and quality accommodation (88% each).

Rest of Canada outdoor adventurers place less importance than other markets on safety (88%), variety (85%), getting away (83%) and accommodation (83%).

Factor	Overall (n=1,542)	Ontario (n=198)	Rest of Canada (n=395)	U.S. Drive (n=754)	U.S. Fly (n=198)
Access to nature and wilderness	93%	94%	93%	93%	95%
Safety and reliability of the destination	92%	94%	88% ▼	93%	95%
Quality of outdoor terrain, trails, and natural environments (e.g., scenery, trail condition, wilderness integrity)	92%	96%	89%	92%	93%
Variety and range of outdoor activities and terrain types available	89%	88%	85% ▼	90%	93%
Cost and overall affordability	88%	89%	90%	87%	89%
Travel time and ease of access	88%	89%	86%	90%	88%
Ability to get away from it all	88%	89%	83% ▼	90%	91%
Quality of accommodation options	88%	89%	83% ▼	89%	90%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,521 to 1,542). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for outdoor adventure activities? (flattened) TOP2 = % somewhat or very important.

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

All outdoor adventurers | Includes past visitors to Northern Ontario

A strong reputation (83%), clear licensing (79%), connectivity (77%) and activities for companions (75%) also matter to most, while fewer rate outfitters (68%), events or competitions (65%) and Indigenous experiences (61%) as important.

U.S. Drive outdoor adventurers place more importance than other markets on connectivity, companion activities, outfitters, events and Indigenous experiences (71% to 80%), and Rest of Canada outdoor adventurers less (36% to 72%).

Factor	Overall (n=1,542)	Ontario (n=198)	Rest of Canada (n=395)	U.S. Drive (n=754)	U.S. Fly (n=198)
Strong reputation or positive word of mouth	83%	83%	79%	86%	83%
Licensing requirements that are clear and manageable	79%	77%	72% ▼	82%	83%
Cell phone or internet connectivity at the destination	77%	82%	66% ▼	80% ▲	79%
Availability of activities for non-outdoor adventure activities travel companions	75%	75%	66% ▼	79% ▲	76%
Availability of outfitters, guides, or operators	68%	66%	51% ▼	76% ▲	76%
Outdoor adventure activities events or competitions	65%	63%	47% ▼	73% ▲	73%
Indigenous cultural experiences	61%	54%	36% ▼	71% ▲	75% ▲

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,521 to 1,542). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for outdoor adventure activities? (flattened) TOP2 = % somewhat or very important.

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

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

Each factor on this slide is important to a large majority of every traveller type.

None of the traveller type differences are significant.

Factor	Overall (n=1,542)	Partners (n=289)	Younger Families (n=354)	Older Families (n=403)	Younger Friends (n=185)	Older Friends (n=234)
Access to nature and wilderness	93%	94%	92%	94%	94%	95%
Safety and reliability of the destination	92%	92%	93%	93%	92%	92%
Quality of outdoor terrain, trails, and natural environments (e.g., scenery, trail condition, wilderness integrity)	92%	93%	90%	93%	91%	94%
Variety and range of outdoor activities and terrain types available	89%	85%	91%	89%	92%	90%
Cost and overall affordability	88%	90%	86%	90%	88%	92%
Travel time and ease of access	88%	86%	89%	89%	92%	90%
Ability to get away from it all	88%	86%	87%	89%	91%	93%
Quality of accommodation options	88%	84%	89%	89%	88%	90%

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

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,521 to 1,542). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for outdoor adventure activities? (flattened) TOP2 = % somewhat or very important.

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

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

Younger families place more importance than other traveller types on companion activities (83%), outfitters (80%), events (77%) and Indigenous experiences (74%), and younger friend groups on events (75%), while partners place less importance on each (43% to 66%).

Factor	Overall (n=1,542)	Partners (n=289)	Younger Families (n=354)	Older Families (n=403)	Younger Friends (n=185)	Older Friends (n=234)
Strong reputation or positive word of mouth	83%	78%	87%	83%	87%	83%
Licensing requirements that are clear and manageable	79%	73%	83%	79%	80%	82%
Cell phone or internet connectivity at the destination	77%	66% ▼	81%	78%	82%	76%
Availability of activities for non-outdoor adventure activities travel companions	75%	65% ▼	83% ▲	78%	79%	71%
Availability of outfitters, guides, or operators	68%	53% ▼	80% ▲	67%	75%	72%
Outdoor adventure activities events or competitions	65%	52% ▼	77% ▲	63%	75% ▲	61%
Indigenous cultural experiences	61%	43% ▼	74% ▲	59%	65%	64%

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

Base: all outdoor adventurers, excluding “Don’t know”; bases vary by item (n=1,521 to 1,542). N6 (TOP2) How important are each of the following factors in determining whether you would visit Northern Ontario for outdoor adventure activities? (flattened) TOP2 = % somewhat or very important.

PREFERRED ACCESS TYPES – MARKET

All outdoor adventurers

Most outdoor adventurers prefer road-accessible areas (87%), while a third would consider fly-in or float plane access (33%), 29% train-in access and 26% remote boat-in access.

U.S. Fly (44%) and U.S. Drive outdoor adventurers (39%) are more open than other markets to fly-in access, and U.S. Drive outdoor adventurers to train-in access (34%), while Ontario and Rest of Canada outdoor adventurers are less open to fly-in (18% and 24%).

Access type	Overall (n=1,479)	Ontario (n=185)	Rest of Canada (n=372)	U.S. Drive (n=731)	U.S. Fly (n=191)
Road-accessible areas	87%	91%	91%	85%	85%
Fly-in or float plane access	33%	18% ▼	24% ▼	39% ▲	44% ▲
Train-in access	29%	25%	20% ▼	34% ▲	34%
Remote boat-in access	26%	23%	20% ▼	28%	30%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,479). N7 For an outdoor adventure activities trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (5%) not shown.

PREFERRED ACCESS TYPES – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Younger families (43%) and younger friend groups (41%) are more open than other traveller types to fly-in access, and younger families to boat-in access (33%), while partners are less open to fly-in access (22%).

Access type	Overall (n=1,479)	Partners (n=268)	Younger Families (n=349)	Older Families (n=380)	Younger Friends (n=177)	Older Friends (n=227)
Road-accessible areas	87%	89%	84%	90%	88%	87%
Fly-in or float plane access	33%	22% ▼	43% ▲	27%	41% ▲	33%
Train-in access	29%	28%	32%	25%	34%	32%
Remote boat-in access	26%	19%	33% ▲	25%	29%	22%

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

Base: all outdoor adventurers (n=1,479). N7 For an outdoor adventure activities trip to Northern Ontario, which of the following access types would you prefer? Please select all that apply.

"Not sure" (5%) not shown.

PREFERRED LODGING OPTIONS – MARKET

All outdoor adventurers

Hotels or motels are the most preferred lodging option for outdoor adventure trips (51%), followed by commercial cottages or cabin rentals (46%), designated campgrounds and drive-in lodges or resorts (45% each), AirBnB (44%) and private cottages (40%).

None of the market differences are significant.

Lodging option	Overall (n=1,543)	Ontario (n=196)	Rest of Canada (n=394)	U.S. Drive (n=756)	U.S. Fly (n=197)
Hotel or motel	51%	47%	53%	51%	49%
Commercial cottage or cabin rental	46%	55%	48%	43%	47%
Designated campground (private or provincial park)	45%	41%	47%	47%	39%
Drive-in lodge or resort	45%	50%	44%	44%	43%
AirBnB	44%	47%	39%	45%	49%
Private cottage (owned or borrowed)	40%	44%	43%	39%	37%
Backcountry or wilderness camping	34%	26%	30%	36%	43%
Home of friends or relatives (unpaid)	15%	19%	19%	14%	11%
Fly-in or remote outpost camp	12%	11%	9%	13%	14%

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

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,543). N8 Which of the following lodging options would you prefer on an outdoor adventure activities trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

PREFERRED LODGING OPTIONS – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to prefer AirBnB (51%), and older friend groups less likely (33%), while younger friend groups are less likely to prefer commercial cottages or cabins (36%).

Lodging option	Overall (n=1,543)	Partners (n=290)	Younger Families (n=354)	Older Families (n=401)	Younger Friends (n=184)	Older Friends (n=235)
Hotel or motel	51%	51%	52%	54%	50%	44%
Commercial cottage or cabin rental	46%	51%	41%	53%	36% ▼	49%
Designated campground (private or provincial park)	45%	41%	46%	43%	47%	52%
Drive-in lodge or resort	45%	44%	41%	50%	40%	48%
AirBnB	44%	40%	51% ▲	48%	49%	33% ▼
Private cottage (owned or borrowed)	40%	39%	35%	46%	37%	46%
Backcountry or wilderness camping	34%	26%	39%	30%	40%	40%
Home of friends or relatives (unpaid)	15%	11%	17%	17%	17%	15%
Fly-in or remote outpost camp	12%	7%	16%	10%	14%	13%

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

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

Base: all outdoor adventurers (n=1,543). N8 Which of the following lodging options would you prefer on an outdoor adventure activities trip to Northern Ontario? Please select all that apply.

"Not sure" (1%) not shown.

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

Outdoor adventurers who have visited Northern Ontario in the past 5 years

Better value for money (42%), quality paid accommodation and more things for travel companions to do (37% each) are the leading factors that would encourage past-five-year visitors to spend more nights in Northern Ontario, followed by packaged experiences and better connectivity (29% each).

U.S. Fly visitors are more likely than other markets to want more things for companions to do (56%), and Rest of Canada visitors less likely (20%).

Factor	Overall (n=707)	Ontario (n=150)	Rest of Canada (n=148)	U.S. Drive (n=340)	U.S. Fly (n=69)
Better value for money overall	42%	43%	39%	44%	42%
Better availability of quality paid accommodation (lodges, hotels, cottages)	37%	40%	32%	35%	49%
More things to do beyond outdoor adventure activities for my travel companions	37%	33%	20% ▼	41%	56% ▲
More packaged or all-inclusive experiences	29%	23%	25%	34%	29%
Better cell or internet connectivity	29%	28%	26%	29%	34%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past 5 years (n=707). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (1%) not shown.

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

Outdoor adventurers who have visited Northern Ontario in the past 5 years

About a quarter would stay longer for improved access (27%), Indigenous cultural experiences (22%) or events timed to their travel (21%), and only 11% are already satisfied with the length of their stays.

None of the market differences are significant.

Factor	Overall (n=707)	Ontario (n=150)	Rest of Canada (n=148)	U.S. Drive (n=340)	U.S. Fly (n=69)
Improved road, trail, or water access infrastructure	27%	28%	25%	28%	26%
Indigenous cultural experiences	22%	16%	13%	25%	33%
Events or competitions timed to my travel	21%	16%	21%	22%	23%
A guided multi-stop itinerary combining activities or sub-regions	19%	17%	12%	22%	22%
Nothing – I am already satisfied with the length of my stays	11%	16%	16%	8%	10%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past 5 years (n=707). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (1%) not shown.

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

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

Partners are less likely than other traveller types to want better connectivity (11%).

Better value ranges from 36% among partners to 50% among younger families, although these differences are not significant.

Factor	Overall (n=707)	Partners (n=99)	Younger Families (n=229)	Older Families (n=150)	Younger Friends (n=101)	Older Friends (n=93)
Better value for money overall	42%	36%	50%	38%	44%	39%
Better availability of quality paid accommodation (lodges, hotels, cottages)	37%	30%	44%	38%	38%	25%
More things to do beyond outdoor adventure activities for my travel companions	37%	27%	43%	39%	37%	34%
More packaged or all-inclusive experiences	29%	23%	32%	24%	31%	28%
Better cell or internet connectivity	29%	11% ▼	32%	31%	30%	37%

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

Base: outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past 5 years (n=707). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (1%) not shown.

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

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

Younger families are more likely than other traveller types to want events timed to their travel (28%).

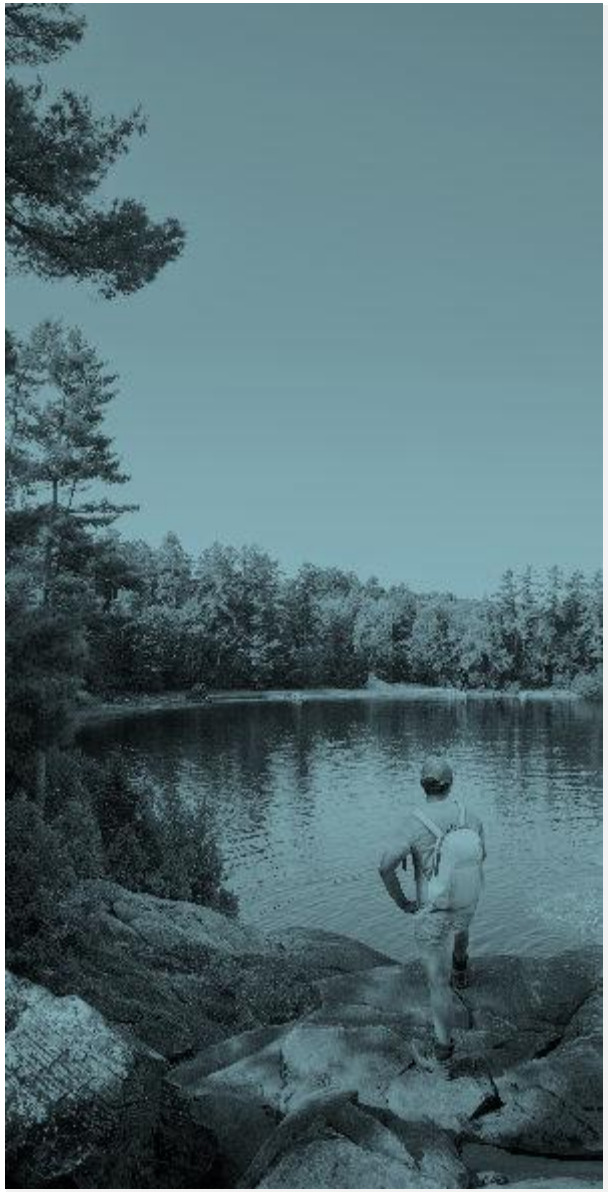
Each other factor on this slide is cited by a third or fewer in every traveller type.

Factor	Overall (n=707)	Partners (n=99)	Younger Families (n=229)	Older Families (n=150)	Younger Friends (n=101)	Older Friends (n=93)
Improved road, trail, or water access infrastructure	27%	19%	29%	28%	33%	29%
Indigenous cultural experiences	22%	19%	25%	23%	17%	21%
Events or competitions timed to my travel	21%	13%	28% ▲	13%	26%	21%
A guided multi-stop itinerary combining activities or sub-regions	19%	11%	23%	23%	16%	18%
Nothing – I am already satisfied with the length of my stays	11%	20%	9%	11%	9%	12%

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

Base: outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past 5 years (n=707). P9 Which of the following would make you most likely to spend more nights in Northern Ontario on a future visit? Please select all that apply.

"Not sure" (1%) not shown.



BARRIERS & COMPETITION

BARRIERS TO VISITING NORTHERN ONTARIO – MARKET (1 OF 3)

All outdoor adventurers | Includes past visitors to Northern Ontario

Cost is the most commonly cited barrier (38%), followed by high transportation costs (35%), wildfires and other disruptions and unfavourable weather (32% each), safety concerns (30%), poor value and poor road or water access (27% each).

Rest of Canada outdoor adventurers are more likely than other markets to cite cost (50%), transportation costs (43%) and poor value (36%), and U.S. Drive outdoor adventurers less likely to cite cost (34%), while Ontario outdoor adventurers are more likely to cite weather (41%) and road or water access (36%).

Barrier	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
Cost	38%	36%	50% ▲	34% ▼	29%
High transportation costs (gas, airfare)	35%	36%	43% ▲	32%	29%
Wildfires, flooding, or other environmental disruptions	32%	38%	38%	30%	25%
Unfavourable weather or season timing	32%	41% ▲	31%	31%	26%
Concerns about safety	30%	37%	27%	30%	32%
Poor value for money	27%	28%	36% ▲	24%	20%
Poor road or water access	27%	36% ▲	32%	23% ▼	21%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for outdoor adventure activities? Please select all that apply.

"Not sure" (5%) not shown.

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

BARRIERS TO VISITING NORTHERN ONTARIO – MARKET (2 OF 3)

All outdoor adventurers | Includes past visitors to Northern Ontario

About a fifth to a quarter of outdoor adventurers cite each barrier on this slide, led by insects (26%) and distance (25%).

Ontario (41%) and Rest of Canada outdoor adventurers (32%) are more likely than other markets to cite insects, and Rest of Canada outdoor adventurers distance (33%), while U.S. Drive outdoor adventurers are less likely to cite insects (22%), distance (22%) or remoteness (17%), and Ontario outdoor adventurers more likely to find Northern Ontario too remote or rugged (28%).

Barrier	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
Insects (e.g., blackflies, mosquitoes)	26%	41% ▲	32% ▲	22% ▼	17% ▼
Too far to drive	25%	30%	33% ▲	22% ▼	19%
Lack of amenities or services at the destination	21%	21%	22%	21%	15%
Limited accommodation options	20%	20%	21%	20%	16%
Too remote or rugged for my comfort level	19%	28% ▲	23%	17% ▼	15%
Poor or unreliable cell phone or internet connectivity	19%	25%	20%	17%	15%
Unfamiliar or unclear regulations	17%	11%	14%	19%	20%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for outdoor adventure activities? Please select all that apply.

"Not sure" (5%) not shown.

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

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

All outdoor adventurers | Includes past visitors to Northern Ontario

Each remaining barrier is cited by 16% of outdoor adventurers or fewer. Anti-American sentiment is cited by 23% of U.S. Drive and 24% of U.S. Fly outdoor adventurers.

Rest of Canada outdoor adventurers are more likely than other markets to say they do not know enough about Northern Ontario's outdoor adventure opportunities (17%).

Barrier	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
Availability of campsites	16%	12%	18%	15%	17%
Anti-American sentiment	14%	–	–	23%	24%
Difficulty finding reliable trip planning information	13%	14%	15%	13%	10%
I do not know enough about Northern Ontario's outdoor adventure activities opportunities	12%	8%	17% ▲	11%	11%
Concerns about crossing the Canada-US border	11%	–	–	18%	15%
Passport or documentation requirements	9%	–	–	15%	15%
Not sure the outdoor adventure activities quality would meet my expectations	8%	8%	11%	7%	5%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for outdoor adventure activities? Please select all that apply.

"Not sure" (5%) not shown.

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

BARRIERS TO VISITING NORTHERN ONTARIO – TRAVELLER TYPE (1 OF 3)

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

Partners are more likely than other traveller types to cite cost (46%), and older families transportation costs (41%), while younger families and younger friend groups are less likely to cite cost (29% each) and transportation costs (27% and 24%).

Barrier	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Cost	38%	46% ▲	29% ▼	41%	29% ▼	40%
High transportation costs (gas, airfare)	35%	37%	27% ▼	41% ▲	24% ▼	42%
Wildfires, flooding, or other environmental disruptions	32%	30%	30%	34%	27%	36%
Unfavourable weather or season timing	32%	28%	31%	34%	28%	37%
Concerns about safety	30%	26%	29%	34%	28%	30%
Poor value for money	27%	25%	24%	31%	19% ▼	32%
Poor road or water access	27%	29%	24%	28%	22%	31%

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

Base: all outdoor adventurers (n=1,559). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for outdoor adventure activities? Please select all that apply.

"Not sure" (5%) not shown.

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

BARRIERS TO VISITING NORTHERN ONTARIO – TRAVELLER TYPE (2 OF 3)

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

Partners are more likely than other traveller types to cite distance (34%), while younger families (15%) and younger friend groups (13%) are less likely to say Northern Ontario is too remote or rugged.

Barrier	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Insects (e.g., blackflies, mosquitoes)	26%	25%	23%	30%	24%	31%
Too far to drive	25%	34% ▲	21%	27%	20%	24%
Lack of amenities or services at the destination	21%	21%	19%	23%	16%	19%
Limited accommodation options	20%	21%	19%	24%	14%	17%
Too remote or rugged for my comfort level	19%	25%	15% ▼	23%	13% ▼	20%
Poor or unreliable cell phone or internet connectivity	19%	17%	21%	17%	18%	21%
Unfamiliar or unclear regulations	17%	15%	18%	16%	20%	17%

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

Base: all outdoor adventurers (n=1,559). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for outdoor adventure activities? Please select all that apply.

"Not sure" (5%) not shown.

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

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

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

Older families are more likely than other traveller types to say they do not know enough about Northern Ontario's opportunities (17%), and younger families (8%) and younger friend groups (7%) less likely.

Barrier	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
Availability of campsites	16%	11%	17%	17%	14%	17%
Anti-American sentiment	14%	9%	12%	16%	14%	20%
Difficulty finding reliable trip planning information	13%	13%	14%	14%	11%	12%
I do not know enough about Northern Ontario's outdoor adventure activities opportunities	12%	15%	8% ▼	17% ▲	7% ▼	11%
Concerns about crossing the Canada-US border	11%	11%	10%	11%	6%	15%
Passport or documentation requirements	9%	8%	8%	9%	7%	13%
Not sure the outdoor adventure activities quality would meet my expectations	8%	8%	8%	9%	9%	6%

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

Base: all outdoor adventurers (n=1,559). BD1 Which of the following might discourage you from visiting or returning to Northern Ontario for outdoor adventure activities? Please select all that apply.

"Not sure" (5%) not shown.

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

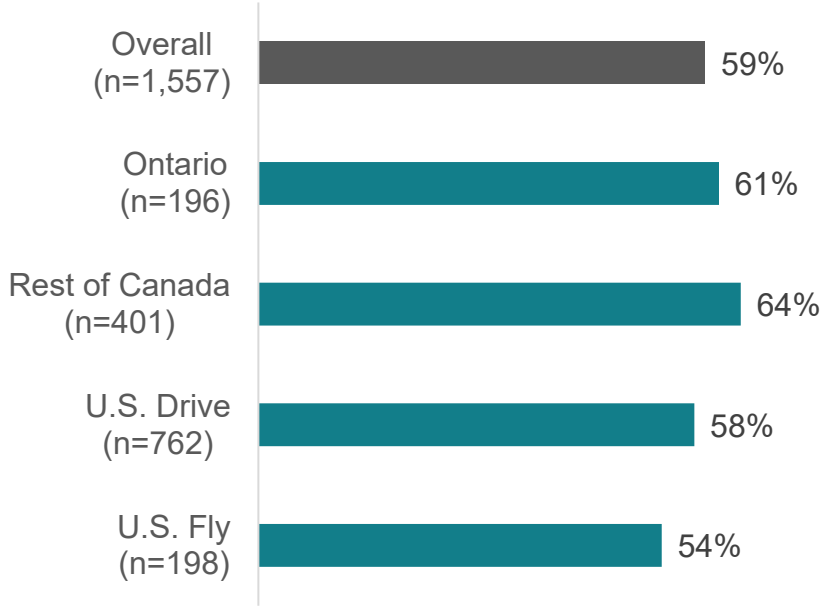
IMPACT OF FINANCIAL PRESSURES ON TRAVEL PLANS

All outdoor adventurers | Traveller types are defined on slide 10

Six in ten outdoor adventurers (59%) agree that financial pressures have impacted their travel plans in the next 12 months, including 24% who strongly agree.

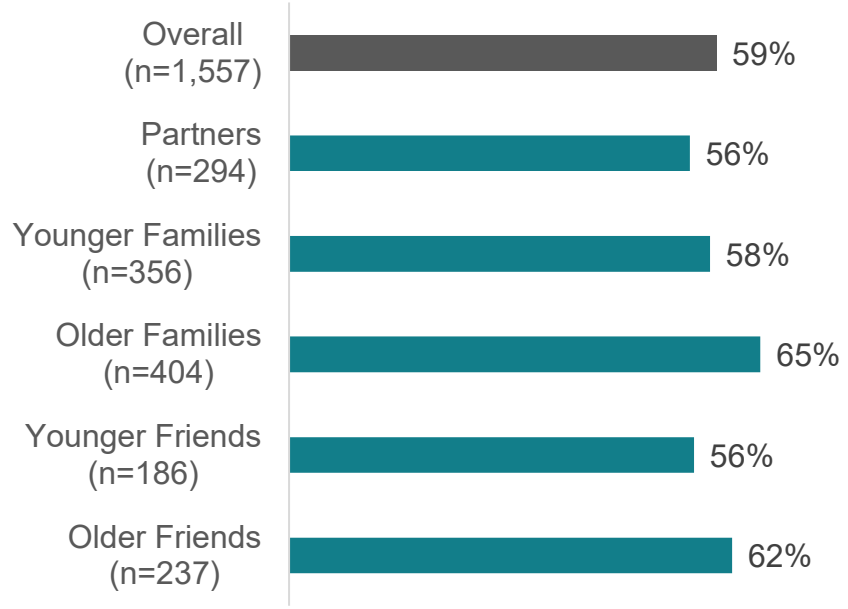
Agreement ranges from 54% among U.S. Fly outdoor adventurers to 64% among Rest of Canada outdoor adventurers, and from 56% among partners and younger friend groups to 65% among older families, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: all outdoor adventurers, excluding “Don’t know” (n=1,557). 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 outdoor adventurers

British Columbia (44%) is the destination outdoor adventurers most often consider instead of Northern Ontario, followed by Quebec (35%), Michigan and somewhere else in Ontario (29% each), New York (27%), Minnesota and Wisconsin (23% each).

Rest of Canada (71%) and Ontario outdoor adventurers (54%) are more likely than other markets to consider British Columbia, and Ontario outdoor adventurers Quebec (64%) and elsewhere in Ontario (56%), while U.S. Drive outdoor adventurers are more likely to consider Michigan (46%), New York (38%), Wisconsin (37%) and Minnesota (34%).

Destination	Overall (n=1,504)	Ontario (n=186)	Rest of Canada (n=390)	U.S. Drive (n=745)	U.S. Fly (n=183)
British Columbia	44%	54% ▲	71% ▲	27% ▼	44%
Quebec	35%	64% ▲	35%	27% ▼	36%
Michigan	29%	14% ▼	5% ▼	46% ▲	27%
Somewhere else in Ontario	29%	56% ▲	24%	25% ▼	27%
New York	27%	20%	9% ▼	38% ▲	27%
Minnesota	23%	7% ▼	7% ▼	34% ▲	29%
Wisconsin	23%	4% ▼	4% ▼	37% ▲	22%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,504). BD2 What other destinations do you consider for outdoor adventure activities trips? Please select all that apply.

"Not sure" (3%) not shown.

Destinations selected by fewer than 1% of outdoor adventurers are not shown.

OTHER DESTINATIONS CONSIDERED – MARKET (2 OF 2)

All outdoor adventurers

About one in six consider Pennsylvania (20%), Manitoba or Saskatchewan (16% each), and 13% Illinois.

U.S. Drive outdoor adventurers are more likely than other markets to consider Pennsylvania (33%) and Illinois (20%), and Rest of Canada outdoor adventurers Manitoba (25%) and Alberta (8%).

Destination	Overall (n=1,504)	Ontario (n=186)	Rest of Canada (n=390)	U.S. Drive (n=745)	U.S. Fly (n=183)
Pennsylvania	20%	5% ▼	3% ▼	33% ▲	19%
Manitoba	16%	14%	25% ▲	12% ▼	18%
Saskatchewan	16%	14%	18%	14%	18%
Illinois	13%	4% ▼	3% ▼	20% ▲	16%
Alberta	2%	<1%	8% ▲	0% ▼	0%
Colorado	1%	0%	<1%	1%	2%
Other	8%	8%	12%	6% ▼	11%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,504). BD2 What other destinations do you consider for outdoor adventure activities trips? Please select all that apply.

"Not sure" (3%) not shown.

Destinations selected by fewer than 1% of outdoor adventurers are not shown.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (1 OF 2)

All outdoor adventurers | Traveller types are defined on slide 10

DESTINATION ONTARIO

Younger families are more likely than other traveller types to consider Michigan (37%), New York (37%) and Minnesota (29%), and partners less likely to consider New York (19%) and Minnesota (15%).

Destination	Overall (n=1,504)	Partners (n=280)	Younger Families (n=350)	Older Families (n=388)	Younger Friends (n=180)	Older Friends (n=229)
British Columbia	44%	44%	38%	45%	45%	48%
Quebec	35%	35%	36%	33%	29%	39%
Michigan	29%	26%	37% ▲	30%	26%	22%
Somewhere else in Ontario	29%	28%	32%	26%	34%	27%
New York	27%	19% ▼	37% ▲	27%	29%	19%
Minnesota	23%	15% ▼	29% ▲	21%	25%	25%
Wisconsin	23%	17%	23%	24%	25%	27%

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

Base: all outdoor adventurers (n=1,504). BD2 What other destinations do you consider for outdoor adventure activities trips? Please select all that apply.

"Not sure" (3%) not shown.

Destinations selected by fewer than 1% of outdoor adventurers are not shown.

OTHER DESTINATIONS CONSIDERED – TRAVELLER TYPE (2 OF 2)

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to consider Pennsylvania (26%) and Illinois (18%).

Each other destination on this slide is considered by a fifth or fewer in every traveller type.

Destination	Overall (n=1,504)	Partners (n=280)	Younger Families (n=350)	Older Families (n=388)	Younger Friends (n=180)	Older Friends (n=229)
Pennsylvania	20%	15%	26% ▲	20%	21%	21%
Manitoba	16%	17%	15%	18%	18%	15%
Saskatchewan	16%	15%	15%	16%	17%	18%
Illinois	13%	10%	18% ▲	12%	14%	11%
Alberta	2%	3%	<1% ▼	3%	1%	3%
Colorado	1%	<1%	1%	1%	<1%	2%
Other	8%	13%	3% ▼	9%	4%	11%

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

Base: all outdoor adventurers (n=1,504). BD2 What other destinations do you consider for outdoor adventure activities trips? Please select all that apply.

"Not sure" (3%) not shown.

Destinations selected by fewer than 1% of outdoor adventurers are not shown.

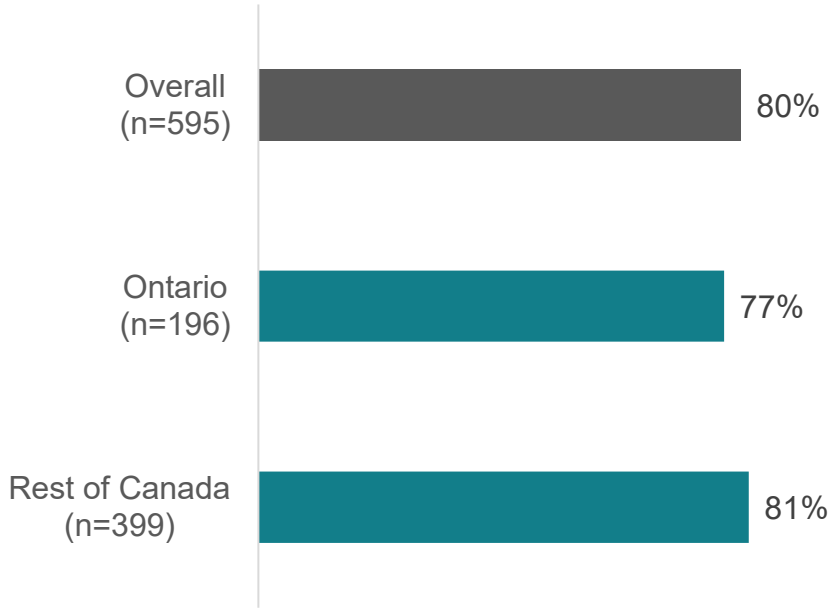
POLITICAL CLIMATE AND CHOOSING NORTHERN ONTARIO

Canadian outdoor adventurers | Traveller types are defined on slide 10

Eight in ten Canadian outdoor adventurers (80%) are more likely to choose Northern Ontario over the United States because of the current political climate in the U.S., including 62% who strongly agree.

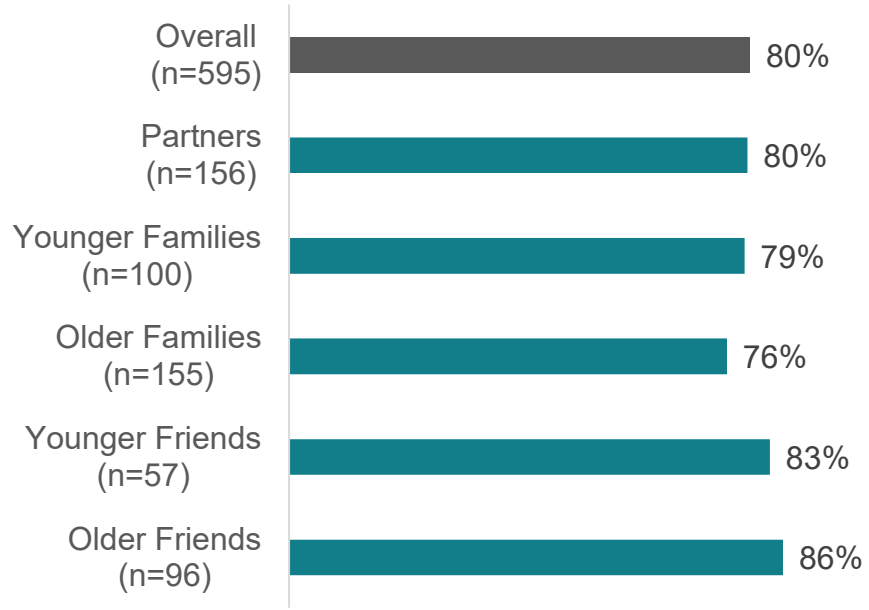
Agreement is 77% among Ontario and 81% among Rest of Canada outdoor adventurers, and ranges from 76% among older families to 86% among older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian outdoor adventurers, excluding “Don’t know” (n=595). 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.

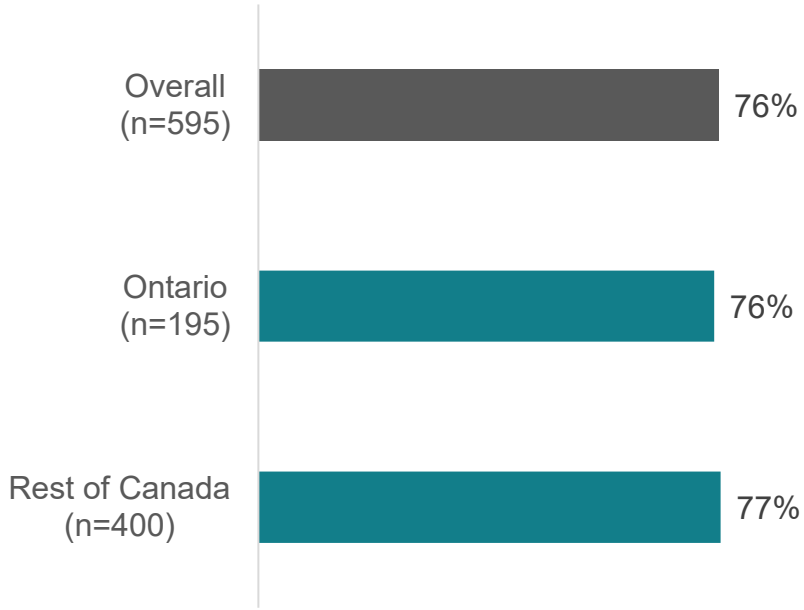
EXCHANGE RATES AND CHOOSING NORTHERN ONTARIO

Canadian outdoor adventurers | Traveller types are defined on slide 10

Three-quarters of Canadian outdoor adventurers (76%) are more likely to choose Northern Ontario over the United States because of unfavourable exchange rates, including 47% who strongly agree.

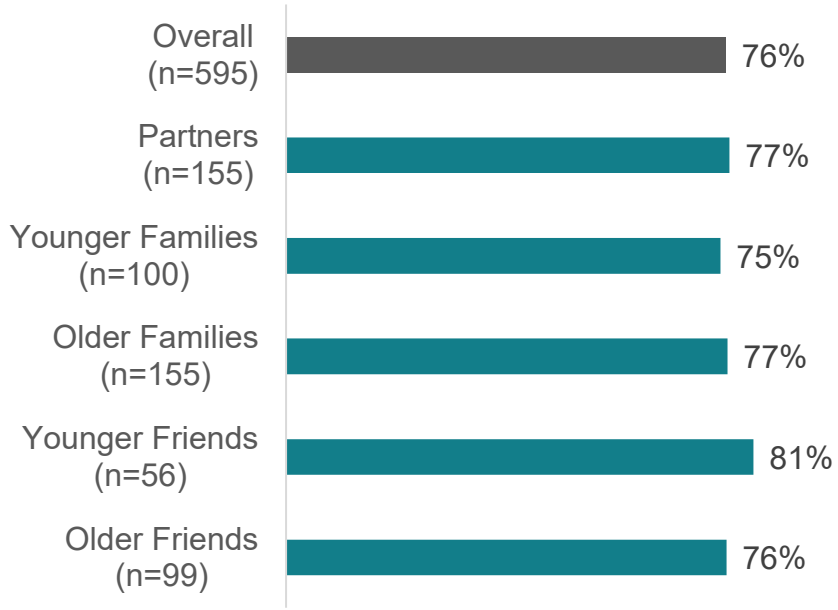
Agreement is 76% among Ontario and 77% among Rest of Canada outdoor adventurers, and ranges from 75% among younger families to 81% among younger friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: Canadian outdoor adventurers, excluding “Don’t know” (n=595). 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.

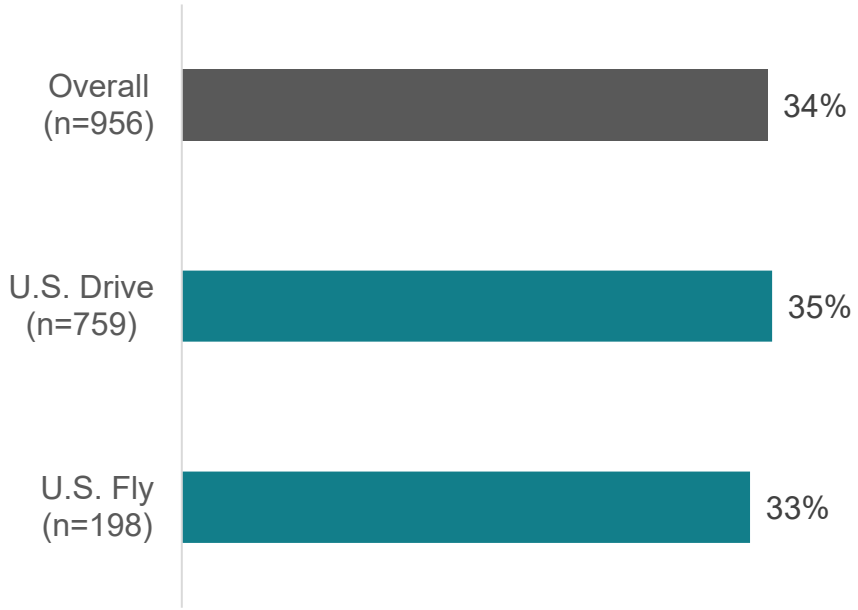
CONCERN ABOUT CROSSING THE BORDER INTO CANADA

U.S. outdoor adventurers | Traveller types are defined on slide 10

A third of U.S. outdoor adventurers (34%) are concerned about crossing the border to enter Canada.

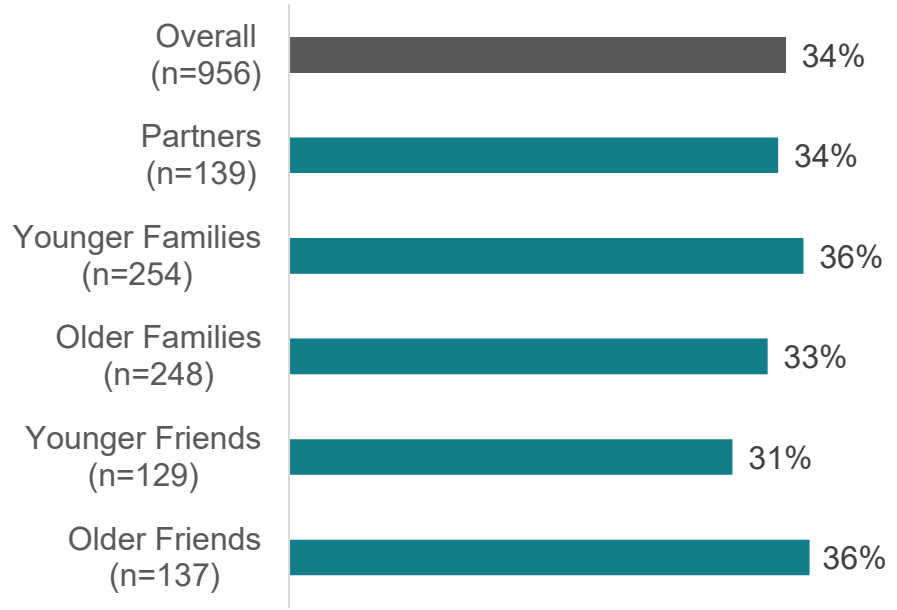
Concern is 35% among U.S. Drive and 33% among U.S. Fly outdoor adventurers, and ranges from 31% among younger friend groups to 36% among younger families and older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. outdoor adventurers, excluding “Don’t know” (n=956). 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.

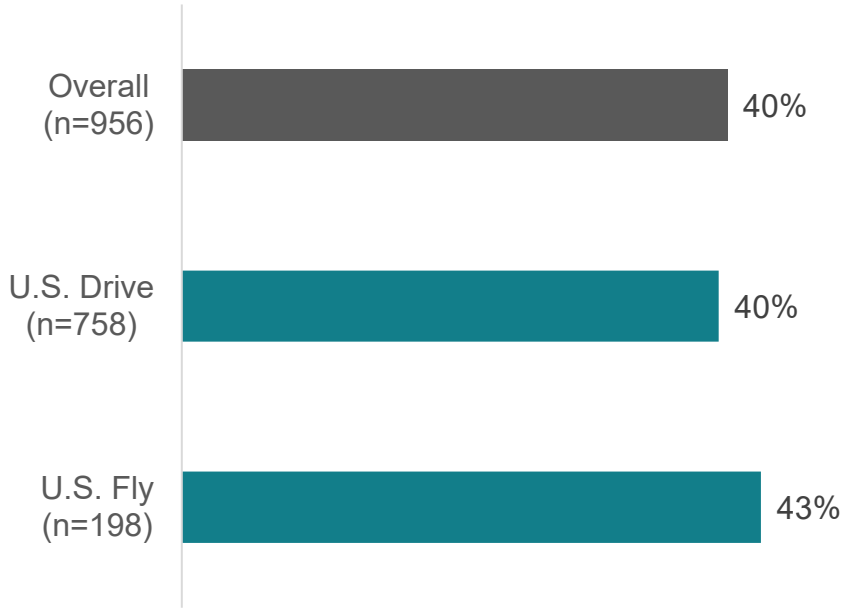
CONCERN ABOUT RETURNING TO THE U.S.

U.S. outdoor adventurers | Traveller types are defined on slide 10

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

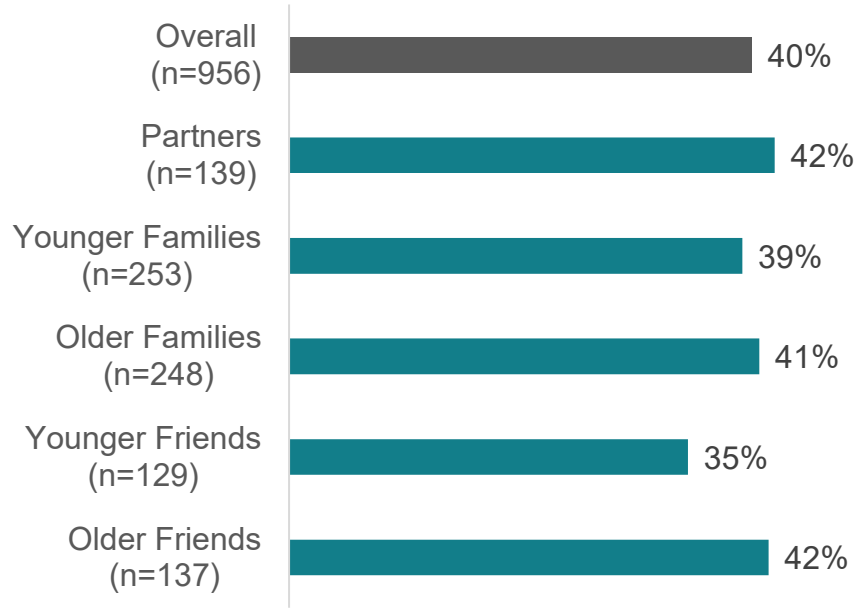
Concern is 40% among U.S. Drive and 43% among U.S. Fly outdoor adventurers, and ranges from 35% among younger friend groups to 42% among partners and older friend groups, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: U.S. outdoor adventurers, excluding “Don’t know” (n=956). 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.