CONTEXT IS EVERYTHING

NORTHERN ONTARIO SEGMENTATION RESEARCH – PHASE I
Avid Outdoor Adventure: Past Visitors Report

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

October 28th, 2026

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

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

50 Carroll Street, Toronto, Ontario

www.crg.ca

CONTEXT IS EVERYTHING

CONTENTS

KEY OBJECTIVES	3
METHODOLOGY	4-11
EXECUTIVE SUMMARY	12-15
PAST EXPERIENCE	16-34
PAST VISITORS VS. OVERALL	35-93



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
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 (this 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 All Outdoor Adventurers 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 – PAST VISITORS: WHO THEY ARE & WHAT THEY DID

PAST NORTHERN ONTARIO VISITORS - AVID OUTDOOR ADVENTURERS

Close to half of outdoor adventurers have visited in the past five years, and they are younger family travellers. Past visitors are mostly U.S. Drive outdoor adventurers (48%), followed by Ontario and Rest of Canada (21% each) and U.S. Fly (10%) outdoor adventurers. Two-thirds (67%) have children at home, 37% are aged 35 to 44, 47% know a lot about Northern Ontario and more than half (56%) mix guided and self-guided experiences. (See slides 17–18, 52)

Their trips are summer trips in paid lodging, often with gear rental and packages. Visitors have made an average of 2.5 outdoor adventure trips to Northern Ontario in five years, most recently in the summer (49%). Their most recent trip lasted 4.2 nights with average party spending of $3,104, rising to $4,335 among U.S. Fly and $3,951 among U.S. Drive parties against about $1,850 among Canadian parties, and 72% stayed in paid roofed lodging, most often hotels or motels (36%) or AirBnB (30%). Close to half rented gear (47%) or bought a packaged experience (43%), and for half (51%) Northern Ontario was the primary and only destination. (See slides 17–18, 23, 25–26, 28–30, 32)

They rate the experience well and would stay longer for value, lodging and things for companions to do. Seven in ten (73%) rated their trip better than outdoor adventure elsewhere, rising to 93% of U.S. Fly visitors and falling to 58% of Ontario visitors. Better value for money (42%), quality paid accommodation and more things for travel companions to do (37% each) would extend their stays. (See slide 34, and slides 116–117 of the All Outdoor Adventurers report)

EXECUTIVE SUMMARY – PAST VISITORS: HOW THEY COMPARE WITH ALL OUTDOOR ADVENTURERS

PAST NORTHERN ONTARIO VISITORS - AVID OUTDOOR ADVENTURERS

Past visitors are younger family travellers, newer to outdoor adventure. They are more likely than outdoor adventurers overall to have children at home (67% vs. 54%) and to be aged 35 to 44 (37% vs. 29%), and fewer have been participating for more than 10 years (43% vs. 54%). They are more likely to travel with a trailer (35% vs. 27%) or fly to a regional hub (41% vs. 36%). (See slide 68)

Past visitors know the region much better and see fewer cost barriers. Nearly half of past visitors (47%) know a lot about Northern Ontario, against 25% of outdoor adventurers overall. They are less likely to cite cost (30% vs. 38%), transportation costs (29% vs. 35%) and distance (19% vs. 25%), and far less likely to say they do not know enough about Northern Ontario's opportunities (3% vs. 12%). (See slides 40–45, and slide 96 of the All Outdoor Adventurers report)

Past visitors use more support and plan differently. Past visitors are more likely than outdoor adventurers overall to mix guided and self-guided experiences (56% vs. 45%) and to value working with local operators (75% vs. 65%). They rely less on word of mouth (43% vs. 51%) and internet search (44% vs. 52%), and 74% are likely to use AI to plan, against 62%. Nine in ten past visitors (90%) are likely to visit again, against 69% overall, and their Net Promoter Score is 45, against 21. (See slides 36, 38, 52, 54, 66)



EXECUTIVE SUMMARY – SUB-REGIONAL PATTERNS

PAST NORTHERN ONTARIO VISITORS - AVID OUTDOOR ADVENTURERS

Visitors spread evenly across the five regions, and Ontario outdoor adventurers stay closer to home. Between 15% and 19% of outdoor adventurers have visited each region, while Ontario outdoor adventurers concentrate in The Great Canadian Wilderness (51%) and Northeast Ontario (43%), and younger families are the most likely to have visited every region (23% to 31%). Visitors to each region rate their trips similarly, with Net Promoter Scores of 44 to 51 and 74% to 79% rating their trip better than elsewhere. (See slides 21–22)

Sunset, Superior and Algoma Country: higher spend and packaged trips. Visitors to Sunset Country ($3,213), Superior Country ($3,371) and Algoma Country ($3,481) spent more per party than past visitors overall ($3,104), and about half bought packaged experiences (47% to 49%). The practical priority is packaged and guided products that build on this higher spend.

Northeast Ontario and The Great Canadian Wilderness: lodging and companion offers. Visitors to Northeast Ontario and The Great Canadian Wilderness are the most likely to want quality paid accommodation (44% each) and more for travel companions to do (40% to 41%), and Great Canadian Wilderness visitors cite weather (35%) and insects (31%) the most. The practical priority is quality lodging and companion activities that extend stays.



PAST EXPERIENCE

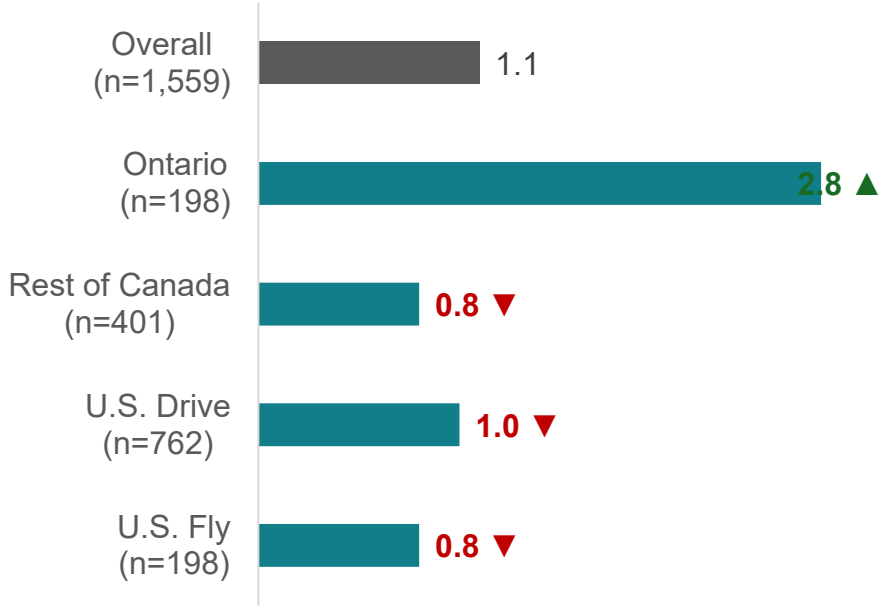
NORTHERN ONTARIO OUTDOOR ADVENTURE TRIPS IN THE PAST 5 YEARS

All outdoor adventurers | Traveller types are defined on slide 10

Outdoor adventurers have taken an average of 1.1 outdoor adventure trips to Northern Ontario in the past five years.

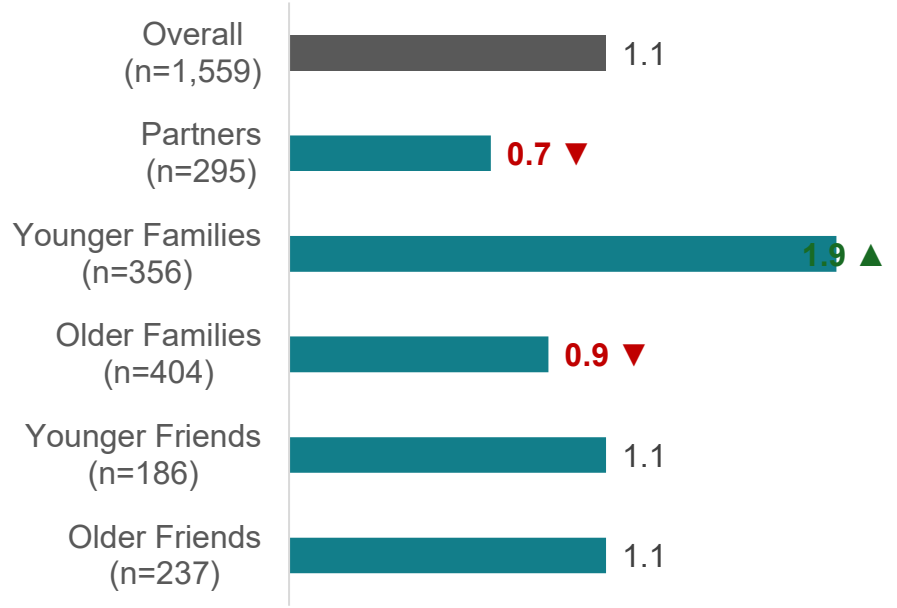
Ontario outdoor adventurers have taken more trips than other markets (2.8), and younger families more than other traveller types (1.9). Partners (0.7) and older families (0.9) have taken fewer.

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). P1 (AVG) In the past 5 years, how many times have you visited Northern Ontario for an outdoor adventure activities trip? AVG = average number of trips among all outdoor adventurers, including those who have not visited.

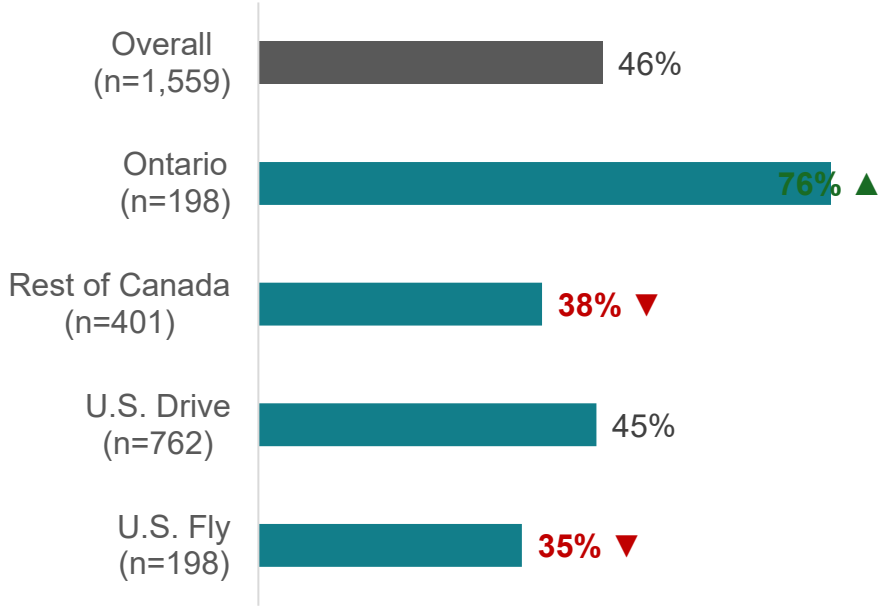
VISITED NORTHERN ONTARIO FOR OUTDOOR ADVENTURE IN THE PAST 5 YEARS

All outdoor adventurers | Traveller types are defined on slide 10

Close to half of outdoor adventurers (46%) have visited Northern Ontario for an outdoor adventure trip in the past five years.

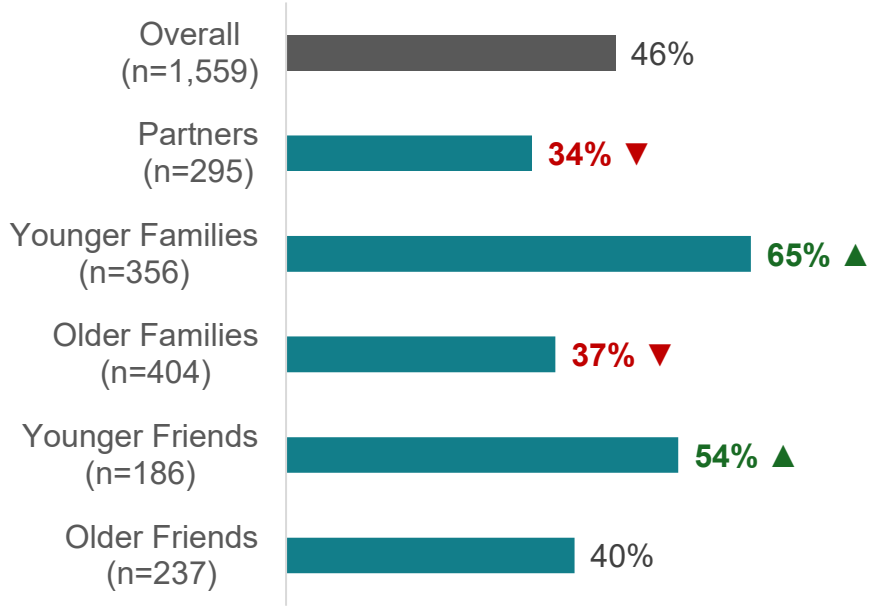
Ontario outdoor adventurers are more likely than other markets to have visited (76%), and Rest of Canada (38%) and U.S. Fly outdoor adventurers (35%) less likely. Younger families (65%) and younger friend groups (54%) are more likely than other traveller types to have visited, and partners (34%) and older families (37%) less likely.

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). P1 (NET: At least once) In the past 5 years, how many times have you visited Northern Ontario for an outdoor adventure activities trip? % who have visited at least once shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – MARKET

All outdoor adventurers

More than half of outdoor adventurers (56%) take about the same number of Northern Ontario trips as 10 years ago, while 17% take more and 18% fewer.

Ontario outdoor adventurers are more likely than other markets to be taking more trips (24%) but also fewer (26%), while U.S. Drive outdoor adventurers are more likely to be taking more (20%) and Rest of Canada outdoor adventurers less likely (9%).

Change in trips	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
I take more trips than I did 10 years ago	17%	24% ▲	9% ▼	20% ▲	18%
About the same as 10 years ago	56%	45% ▼	59%	58%	54%
I take fewer trips than I did 10 years ago	18%	26% ▲	22%	14% ▼	19%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). P1B Compared to 10 years ago, how has your participation in outdoor adventure activities trips in Northern Ontario changed?

"Not sure" (9%) not shown.

CHANGE IN TRIPS VS. 10 YEARS AGO – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Younger families (31%) and younger friend groups (24%) are more likely than other traveller types to be taking more trips, while partners (12%), older families (12%) and older friend groups (8%) are less likely.

Change in trips	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
I take more trips than I did 10 years ago	17%	12% ▼	31% ▲	12% ▼	24% ▲	8% ▼
About the same as 10 years ago	56%	56%	48% ▼	58%	54%	63%
I take fewer trips than I did 10 years ago	18%	21%	14% ▼	20%	15%	21%

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

Base: all outdoor adventurers (n=1,559). P1B Compared to 10 years ago, how has your participation in outdoor adventure activities trips in Northern Ontario changed?

"Not sure" (9%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – MARKET

All outdoor adventurers

About one in five outdoor adventurers have visited each part of Northern Ontario, from 15% for Algoma Country to 19% for The Great Canadian Wilderness.

Ontario outdoor adventurers are more likely than other markets to have visited The Great Canadian Wilderness (51%), Northeast Ontario (43%), Superior Country (27%) and Algoma Country (25%).

Region	Overall (n=1,559)	Ontario (n=198)	Rest of Canada (n=401)	U.S. Drive (n=762)	U.S. Fly (n=198)
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	19%	51% ▲	13% ▼	16% ▼	14%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	18%	27% ▲	16%	19%	10% ▼
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	18%	43% ▲	14%	15% ▼	11% ▼
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	18%	21%	18%	18%	12%
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	15%	25% ▲	9% ▼	17%	13%

▲ / ▼ Significantly higher / lower than the other markets

Base: all outdoor adventurers (n=1,559). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply.

"Not sure" (1%) not shown.

PARTS OF NORTHERN ONTARIO VISITED – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Younger families are more likely than other traveller types to have visited every region (23% to 31%), while partners are less likely to have visited Sunset Country, Superior Country and The Great Canadian Wilderness (12% to 13%).

Region	Overall (n=1,559)	Partners (n=295)	Younger Families (n=356)	Older Families (n=404)	Younger Friends (n=186)	Older Friends (n=237)
The Great Canadian Wilderness (e.g., Parry Sound, Algonquin Park, Kearney, Burks Falls, South River, Sundridge, Magnetawan, Loring, excluding Muskoka District)	19%	13% ▼	26% ▲	15%	23%	24%
Northwest Ontario - Superior Country (e.g., Thunder Bay, Nipigon, Greenstone, Terrace Bay, Red Rock area)	18%	12% ▼	31% ▲	15%	20%	11% ▼
Northeast Ontario (e.g., Sudbury, North Bay, Timmins, Manitoulin Island, Cochrane area)	18%	14%	27% ▲	18%	16%	13%
Northwest Ontario - Sunset Country (e.g., Kenora, Lake of the Woods, Fort Frances, Red Lake, Dryden, Sioux Lookout, Atikokan, Eagle Lake area)	18%	12% ▼	29% ▲	13% ▼	23% ▲	12% ▼
North Central Ontario - Algoma Country (e.g., Sault Ste. Marie, Elliot Lake, Wawa, Chapleau, White River, Blind River, Thessalon area)	15%	11%	23% ▲	11%	18%	14%

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

Base: all outdoor adventurers (n=1,559). P2 Which part(s) of Northern Ontario have you visited? Please select all that apply.

"Not sure" (1%) not shown.

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – MARKET

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

Half of past-five-year visitors (49%) took their most recent Northern Ontario outdoor adventure trip in the summer, followed by spring (21%), fall (16%) and winter (14%).

None of the market differences are significant.

Season	Overall (n=712)	Ontario (n=150)	Rest of Canada (n=151)	U.S. Drive (n=342)	U.S. Fly (n=69)
Winter (December – February)	14%	10%	11%	17%	17%
Spring (March – May)	21%	16%	14%	23%	30%
Summer (June – August)	49%	54%	61%	43%	37%
Fall (September – November)	16%	19%	14%	16%	15%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past 5 years (n=712). P3 Thinking about your most recent Northern Ontario trip that involved outdoor adventure activities, in what season did that trip take place?

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

SEASON OF MOST RECENT NORTHERN ONTARIO TRIP – TRAVELLER TYPE

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

Summer trips range from 48% among younger families and older friend groups to 51% among older families and younger friend groups.

None of the traveller type differences are significant.

Season	Overall (n=712)	Partners (n=101)	Younger Families (n=230)	Older Families (n=151)	Younger Friends (n=101)	Older Friends (n=95)
Winter (December – February)	14%	11%	19%	14%	16%	6%
Spring (March – May)	21%	19%	20%	20%	19%	19%
Summer (June – August)	49%	49%	48%	51%	51%	48%
Fall (September – November)	16%	20%	12%	15%	14%	26%

▲ / ▼ 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=712). P3 Thinking about your most recent Northern Ontario trip that involved outdoor adventure activities, in what season did that trip take place?

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

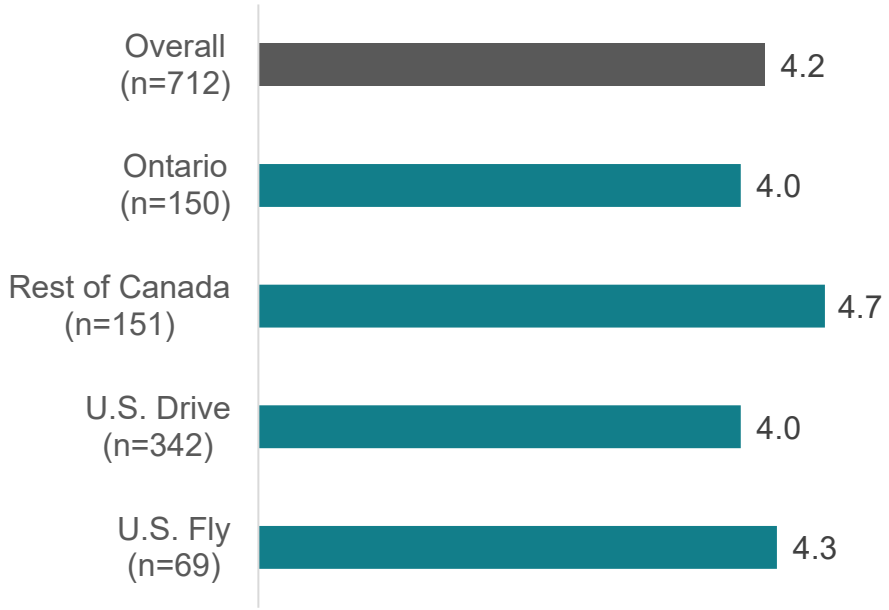
LENGTH OF MOST RECENT NORTHERN ONTARIO TRIP

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

The most recent Northern Ontario outdoor adventure trip lasted an average of 4.2 nights.

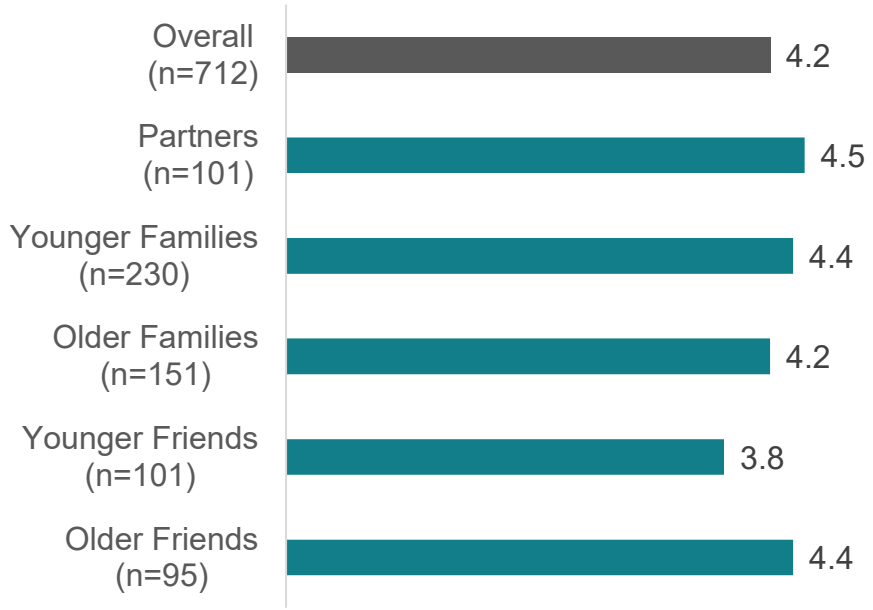
Trip length ranges from 3.8 nights among younger friend groups to 4.7 among Rest of Canada visitors, with no significant differences.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ 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=712). P4 (AVG) Thinking about your most recent Northern Ontario trip that involved outdoor adventure activities, how long was that trip (total nights away from home)? AVG = average number of nights.

ACCOMMODATION ON MOST RECENT TRIP – MARKET

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

Hotels or motels were the most used accommodation on the most recent Northern Ontario outdoor adventure trip (36%), followed by AirBnB (30%), designated campgrounds (24%) and backcountry camping (21%).

None of the market differences are significant.

Accommodation	Overall (n=711)	Ontario (n=150)	Rest of Canada (n=151)	U.S. Drive (n=340)	U.S. Fly (n=69)
Hotel or motel	36%	29%	34%	42%	31%
AirBnB	30%	28%	23%	32%	40%
Designated campground (private or provincial park)	24%	23%	23%	25%	29%
Backcountry or wilderness camping	21%	17%	16%	24%	31%
Commercial cottage or cabin rental	18%	13%	14%	22%	21%
Private cottage (owned or borrowed)	17%	23%	14%	16%	10%
Drive-in lodge or resort	15%	10%	8%	18%	23%
Home of friends or relatives (unpaid)	12%	8%	16%	12%	10%
Fly-in or remote outpost camp	6%	1%	4%	9%	8%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past 5 years (n=711). P5 Thinking about your most recent Northern Ontario trip that involved outdoor adventure activities, where did you stay on that trip? Please select all that apply.

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

ACCOMMODATION ON MOST RECENT TRIP – TRAVELLER TYPE

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 have stayed in an AirBnB (39%) or a commercial cottage or cabin (26%), and older friend groups less likely to have stayed in an AirBnB (13%).

Accommodation	Overall (n=711)	Partners (n=101)	Younger Families (n=229)	Older Families (n=151)	Younger Friends (n=101)	Older Friends (n=95)
Hotel or motel	36%	33%	40%	43%	29%	28%
AirBnB	30%	34%	39% ▲	20%	34%	13% ▼
Designated campground (private or provincial park)	24%	19%	28%	23%	29%	22%
Backcountry or wilderness camping	21%	15%	25%	16%	26%	26%
Commercial cottage or cabin rental	18%	22%	26% ▲	14%	11%	14%
Private cottage (owned or borrowed)	17%	14%	16%	15%	19%	21%
Drive-in lodge or resort	15%	7%	19%	13%	14%	15%
Home of friends or relatives (unpaid)	12%	7%	14%	12%	13%	10%
Fly-in or remote outpost camp	6%	1%	8%	7%	7%	4%

▲ / ▼ 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=711). P5 Thinking about your most recent Northern Ontario trip that involved outdoor adventure activities, where did you stay on that trip? Please select all that apply.

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

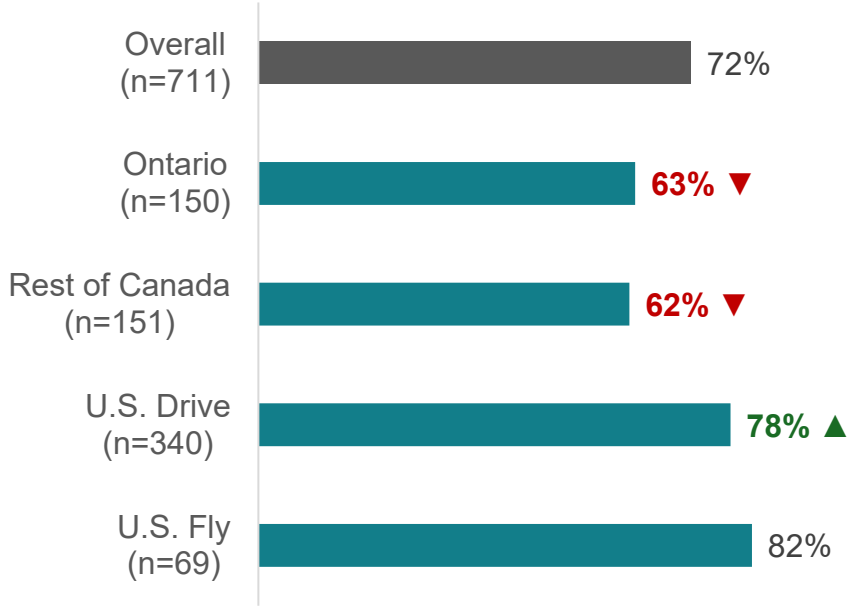
HIGH-YIELD VISITORS

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

Seven in ten past-five-year visitors (72%) stayed in paid roofed lodging on their most recent Northern Ontario trip, making them high-yield visitors.

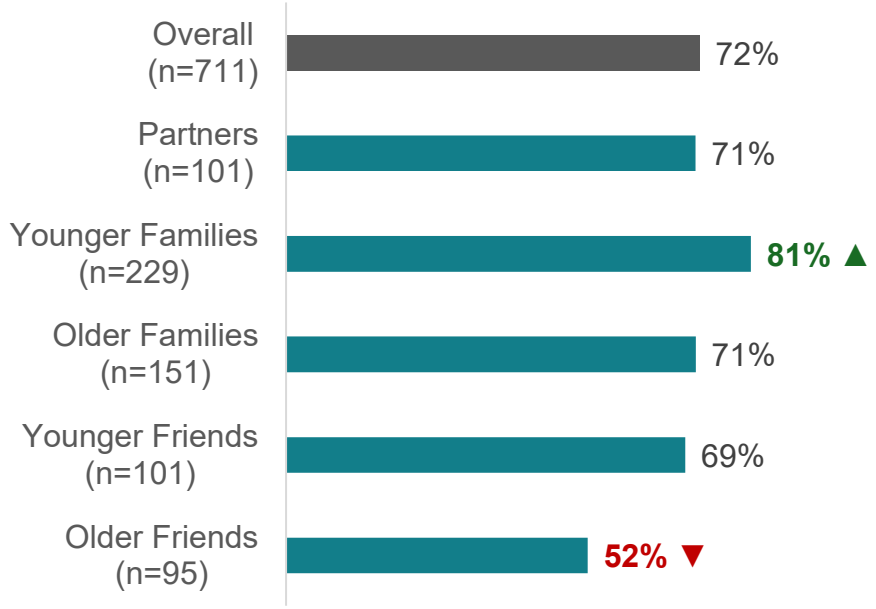
U.S. Drive visitors are more likely than other markets to be high-yield (78%), and Ontario (63%) and Rest of Canada visitors (62%) less likely. Younger families are more likely than other traveller types (81%), and older friend groups less likely (52%).

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ 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=711). P5_HY Thinking about your most recent Northern Ontario trip that involved outdoor adventure activities, where did you stay on that trip? Please select all that apply. High-yield = stayed in a drive-in lodge or resort, fly-in or remote outpost camp, commercial cottage or cabin rental, hotel or motel, or AirBnB (P5 codes 1–5)

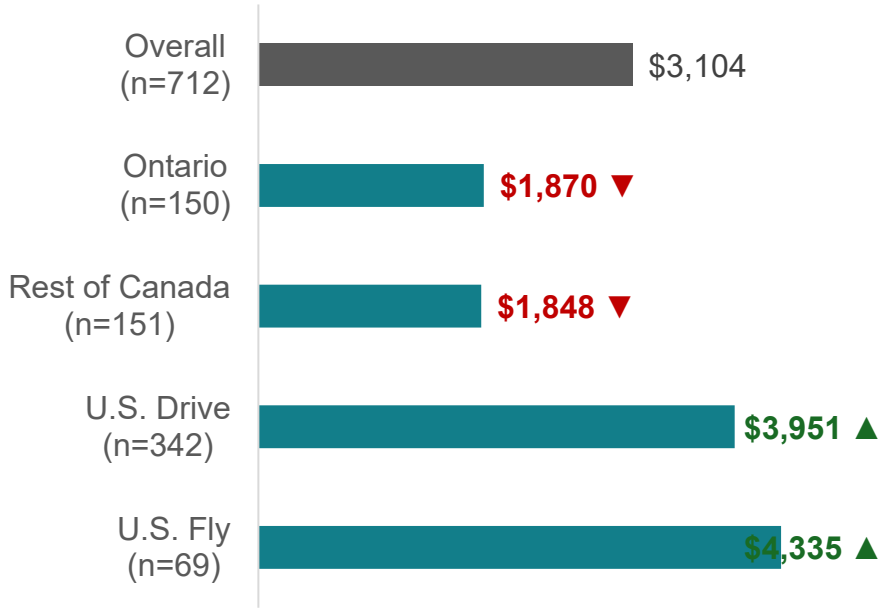
TRAVEL PARTY SPEND ON MOST RECENT NORTHERN ONTARIO TRIP

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

Travel parties spent an average of $3,104 on their most recent Northern Ontario outdoor adventure trip.

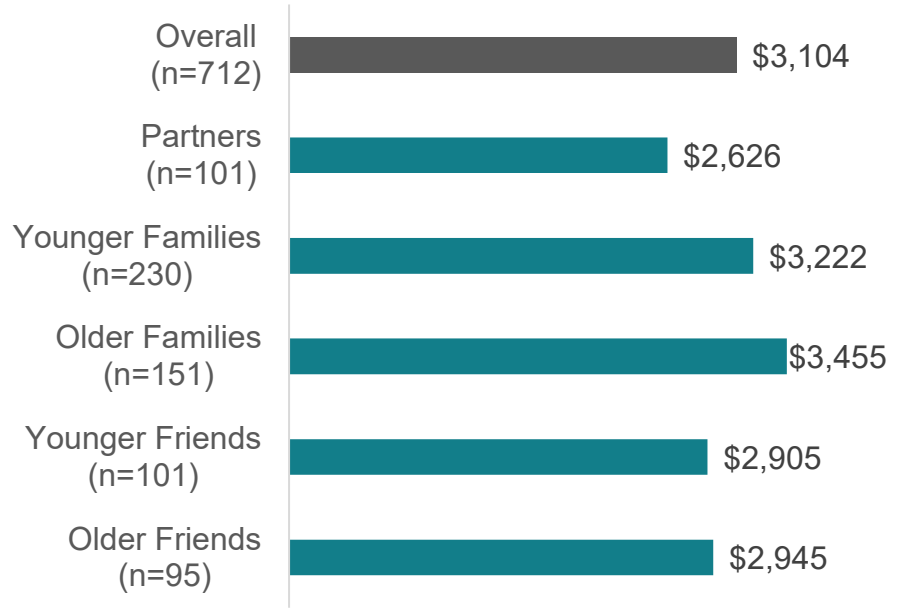
U.S. Fly ($4,335) and U.S. Drive parties ($3,951) spent more than other markets, and Ontario ($1,870) and Rest of Canada parties ($1,848) less. Among traveller types, spending ranges from $2,626 among partners to $3,455 among older families.

MARKET



▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



▲ / ▼ 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=712). P6 (CAD) Approximately how much did your travel party spend in total on that Northern Ontario trip? Average total travel party spend in Canadian dollars; U.S. responses converted at 1.394.

SERVICES USED ON MOST RECENT TRIP – MARKET

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

Close to half of past-five-year visitors rented equipment or gear (47%) on their most recent Northern Ontario outdoor adventure trip, 43% bought a packaged experience and 38% used a local outfitter or guide, while 9% used a charter or float plane. A fifth (21%) used none of these.

U.S. Drive visitors are more likely than other markets to have used each of the main services, and U.S. Fly visitors to have used a local outfitter or guide (59%) or a charter or float plane (19%), while Ontario (35%) and Rest of Canada visitors (42%) are more likely to have used none.

Service	Overall (n=712)	Ontario (n=150)	Rest of Canada (n=151)	U.S. Drive (n=342)	U.S. Fly (n=69)
Equipment or gear rental	47%	43%	30% ▼	55% ▲	57%
Packaged experience	43%	30% ▼	29% ▼	54% ▲	49%
Local outfitter or guide service	38%	25% ▼	29% ▼	45% ▲	59% ▲
Charter or float plane	9%	7%	8%	9%	19% ▲
None of the above	21%	35% ▲	42% ▲	10% ▼	6% ▼

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past 5 years (n=712). P7 Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

SERVICES USED ON MOST RECENT TRIP – TRAVELLER TYPE

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 have rented gear (57%), bought a packaged experience (60%) or used a guide (46%), and younger friend groups to have rented gear (58%), while partners and older friend groups are more likely to have used none (37% and 33%).

Service	Overall (n=712)	Partners (n=101)	Younger Families (n=230)	Older Families (n=151)	Younger Friends (n=101)	Older Friends (n=95)
Equipment or gear rental	47%	29% ▼	57% ▲	46%	58% ▲	35%
Packaged experience	43%	26% ▼	60% ▲	42%	45%	21% ▼
Local outfitter or guide service	38%	30%	46% ▲	37%	39%	37%
Charter or float plane	9%	6%	11%	7%	8%	10%
None of the above	21%	37% ▲	10% ▼	25%	14%	33% ▲

▲ / ▼ 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=712). P7 Did you use any of the following on your most recent Northern Ontario trip? Please select all that apply.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – MARKET

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

For half of past-five-year visitors (51%), Northern Ontario was the primary and only destination of their most recent outdoor adventure trip, and for a third (36%) the main destination with brief stops elsewhere.

Ontario visitors are more likely than other markets to say it was their primary and only destination (62%).

Role of Northern Ontario	Overall (n=712)	Ontario (n=150)	Rest of Canada (n=151)	U.S. Drive (n=342)	U.S. Fly (n=69)
Northern Ontario was our primary and only destination	51%	62% ▲	49%	47%	48%
Northern Ontario was the main destination, with brief stops elsewhere	36%	30%	31%	40%	42%
Northern Ontario was one of several equal destinations on the trip	8%	5%	12%	8%	8%
Northern Ontario was a secondary stop on a trip focused elsewhere	3%	1%	7%	4%	0%

▲ / ▼ Significantly higher / lower than the other markets

Base: outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past 5 years (n=712). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (1%) not shown.

ROLE OF NORTHERN ONTARIO IN MOST RECENT TRIP – TRAVELLER TYPE

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

DESTINATION ONTARIO

Older families are more likely than other traveller types to say Northern Ontario was a secondary stop (9%), and younger families less likely (1%).

Role of Northern Ontario	Overall (n=712)	Partners (n=101)	Younger Families (n=230)	Older Families (n=151)	Younger Friends (n=101)	Older Friends (n=95)
Northern Ontario was our primary and only destination	51%	52%	52%	48%	51%	52%
Northern Ontario was the main destination, with brief stops elsewhere	36%	31%	38%	36%	39%	37%
Northern Ontario was one of several equal destinations on the trip	8%	10%	8%	8%	7%	6%
Northern Ontario was a secondary stop on a trip focused elsewhere	3%	3%	1% ▼	9% ▲	1%	4%

▲ / ▼ 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=712). P7B Was Northern Ontario the primary destination of that trip, or part of a broader itinerary?

"Not sure" (1%) not shown.

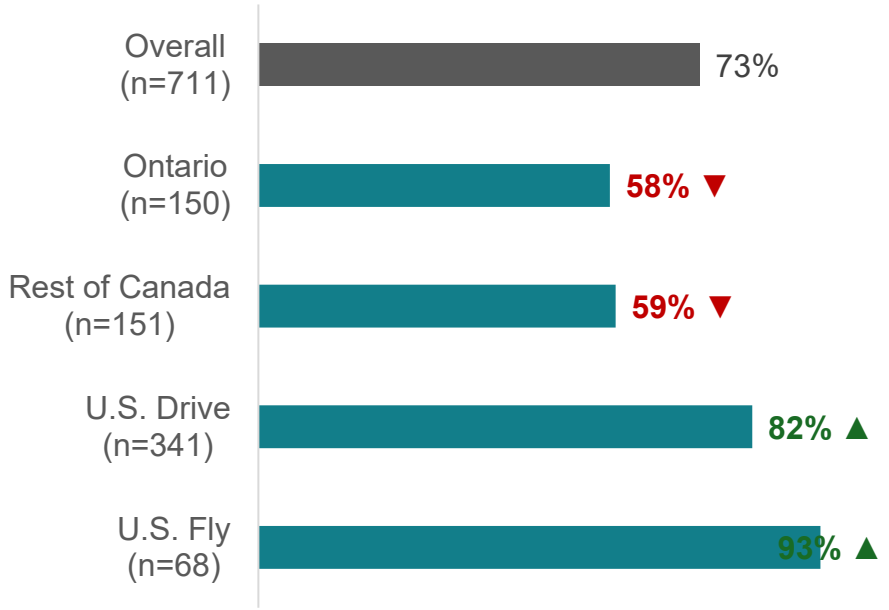
RATING OF MOST RECENT NORTHERN ONTARIO EXPERIENCE

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

Seven in ten past-five-year visitors (73%) rate their most recent Northern Ontario outdoor adventure experience as somewhat or much better than trips taken elsewhere, including 38% who rate it much better.

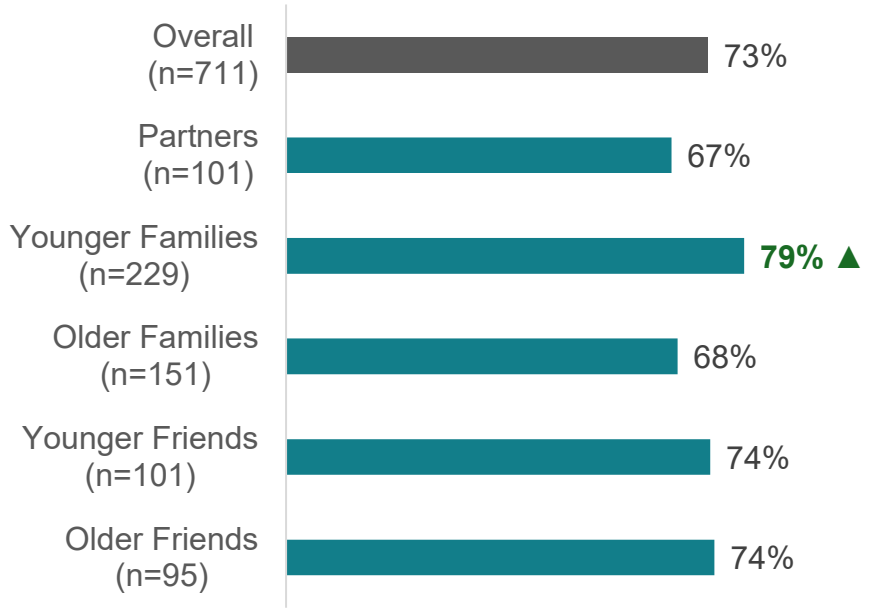
U.S. Fly (93%) and U.S. Drive visitors (82%) rate it higher than other markets, and Ontario (58%) and Rest of Canada visitors (59%) lower. Younger families rate it higher than other traveller types (79%).

MARKET



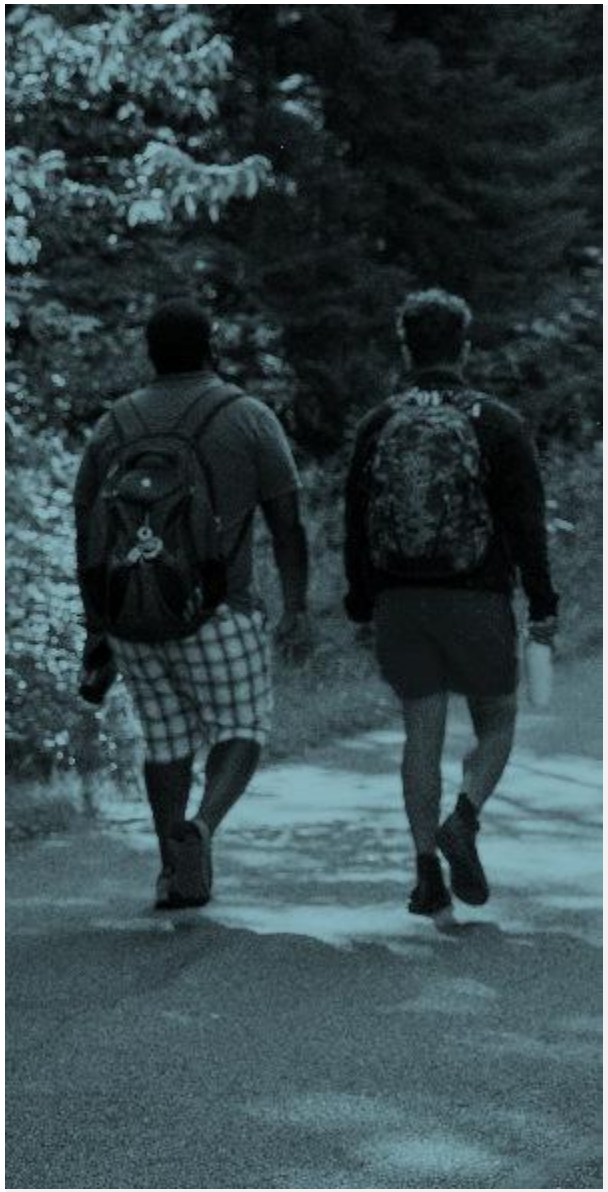
▲ / ▼ Significantly higher / lower than the other markets

TRAVELLER TYPE



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

Base: outdoor adventurers who have visited Northern Ontario for outdoor adventure in the past 5 years, excluding “Don’t know” (n=711). P8 (TOP2) Compared to outdoor adventure activities trips you have taken elsewhere, how would you rate your most recent Northern Ontario experience overall? TOP2 = % somewhat or much better.



PAST VISITORS VS. OVERALL

PAST VISITORS: LIKELIHOOD TO RECOMMEND (NPS) – MARKET

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

Past visitors give Northern Ontario an NPS of 45, more than double the 21 among all outdoor adventurers who know the region.

Visitors are more positive than their market overall among Ontario (38 vs. 23), Rest of Canada (26 vs. -2) and U.S. Drive outdoor adventurers (54 vs. 31).

Measure	Overall (n=1,207 / 682)	Ontario (n=170 / 138)	Rest of Canada (n=284 / 146)	U.S. Drive (n=594 / 330)	U.S. Fly (n=159 / 68)
NPS score	21	23	-2	31	24
	45 ▲	38 ▲	26 ▲	54 ▲	58 ▲

Know Northern Ontario (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who know a lot or a little about Northern Ontario (n=1,207; past visitors n=682).
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)

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

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

Past visitors give Northern Ontario a higher NPS than outdoor adventurers overall (45 vs. 21).

Visitors are more positive than their group overall among partners (51 vs. 17), older families (41 vs. 9) and younger families (53 vs. 36).

Measure	Overall (n=1,207 / 682)	Partners (n=201 / 94)	Younger Families (n=309 / 220)	Older Families (n=295 / 143)	Younger Friends (n=152 / 99)	Older Friends (n=191 / 92)
NPS score	21	17	36	9	21	19
	45 ▲	51 ▲	53 ▲	41 ▲	36 ▲	35

Know Northern Ontario (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who know a lot or a little about Northern Ontario (n=1,207; past visitors n=682).
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)

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

All outdoor adventurers

Nine in ten past visitors (90%) are likely to visit Northern Ontario for outdoor adventure in the next two years, compared with 69% of outdoor adventurers overall.

Visitors are more likely than their market overall to return among Ontario (90% vs. 77%) and Rest of Canada outdoor adventurers (81% vs. 50%).

Response	Overall (n=1,519 / 710)	Ontario (n=194 / 148)	Rest of Canada (n=389 / 151)	U.S. Drive (n=742 / 341)	U.S. Fly (n=193 / 69)
Likely to visit (TOP2)	69%	77%	50%	75%	75%
	90% ▲	90% ▲	81% ▲	93% ▲	94% ▲

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers, excluding “Don’t know” (n=1,519; past visitors n=710). N4 (TOP2) How likely are you to visit Northern Ontario for an outdoor adventure activities trip in the next 2 years?

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

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more likely than outdoor adventurers overall to visit in the next two years (90% vs. 69%).

Visitors are more likely than their group overall to return among partners (88% vs. 55%) and younger families (95% vs. 87%).

Response	Overall (n=1,519 / 710)	Partners (n=281 / 98)	Younger Families (n=353 / 230)	Older Families (n=387 / 151)	Younger Friends (n=184 / 101)	Older Friends (n=233 / 95)
Likely to visit (TOP2)	69%	55%	87%	61%	79%	65%
	90% ▲	88% ▲	95% ▲	83% ▲	92% ▲	88% ▲

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers, excluding “Don’t know” (n=1,519; past visitors n=710). N4 (TOP2) How likely are you to visit Northern Ontario for an outdoor adventure activities trip in the next 2 years?

PAST VISITORS: BARRIERS – MARKET (1 OF 6)

All outdoor adventurers

Past visitors are less likely than outdoor adventurers overall to be discouraged by cost (30% vs. 38%) and high transportation costs (29% vs. 35%).

U.S. Drive (24% vs. 34%) and Rest of Canada visitors (40% vs. 50%) are less likely than their market overall to cite cost.

Barrier	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Cost	38%	36%	50%	34%	29%
	30% ▼	37%	40% ▼	24% ▼	17% ▼
High transportation costs (gas, airfare)	35%	36%	43%	32%	29%
	29% ▼	35%	35%	26% ▼	19%
Wildfires, flooding, or other environmental disruptions	32%	38%	38%	30%	25%
	31%	38%	40%	25%	24%
Unfavourable weather or season timing	32%	41%	31%	31%	26%
	30%	42%	31%	25% ▼	21%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (2 OF 6)

All outdoor adventurers

Past visitors cite each barrier on this slide at a similar rate to outdoor adventurers overall.

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

Barrier	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Concerns about safety	30%	37%	27%	30%	32%
	30%	37%	31%	26%	33%
Poor value for money	27%	28%	36%	24%	20%
	25%	27%	37%	20%	17%
Poor road or water access	27%	36%	32%	23%	21%
	26%	35%	31%	20%	24%
Insects (e.g., blackflies, mosquitoes)	26%	41%	32%	22%	17%
	27%	44%	32%	20%	18%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (3 OF 6)

All outdoor adventurers

Past visitors are less likely to say Northern Ontario is too far to drive (19% vs. 25%).

Rest of Canada (21% vs. 33%) and U.S. Drive visitors (16% vs. 22%) are less likely than their market overall to cite distance.

Barrier	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Too far to drive	25%	30%	33%	22%	19%
	19% ▼	28%	21% ▼	16% ▼	11%
Lack of amenities or services at the destination	21%	21%	22%	21%	15%
	21%	21%	24%	22%	14%
Limited accommodation options	20%	20%	21%	20%	16%
	17%	18%	16%	16%	20%
Too remote or rugged for my comfort level	19%	28%	23%	17%	15%
	17%	28%	19%	13%	12%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (4 OF 6)

All outdoor adventurers

Past visitors cite each barrier on this slide at a similar rate to outdoor adventurers overall.

Rest of Canada visitors are more likely than their market overall to cite unfamiliar or unclear regulations (22% vs. 14%).

Barrier	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Poor or unreliable cell phone or internet connectivity	19%	25%	20%	17%	15%
	17%	24%	22%	13% ▼	14%
Unfamiliar or unclear regulations	17%	11%	14%	19%	20%
	17%	12%	22% ▲	16%	19%
Availability of campsites	16%	12%	18%	15%	17%
	17%	15%	17%	17%	17%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (5 OF 6)

All outdoor adventurers

Past visitors are less likely to say they do not know enough about Northern Ontario's outdoor adventure opportunities (3% vs. 12%).

Ontario visitors are less likely than their market overall to say so (4% vs. 8%).

Barrier	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Anti-American sentiment	14%	–	–	23%	24%
	13%	–	–	22%	19%
Difficulty finding reliable trip planning information	13%	14%	15%	13%	10%
	12%	13%	15%	11%	11%
I do not know enough about Northern Ontario's outdoor adventure activities opportunities	12%	8%	17%	11%	11%
	3% ▼	4% ▼	2% ▼	3% ▼	3% ▼

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

PAST VISITORS: BARRIERS – MARKET (6 OF 6)

All outdoor adventurers

Past visitors cite each barrier on this slide at a similar rate to outdoor adventurers overall.

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

Barrier	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Concerns about crossing the Canada-US border	11%	–	–	18%	15%
	8%	–	–	14%	12%
Passport or documentation requirements	9%	–	–	15%	15%
	6%	–	–	10%	11%
Not sure the outdoor adventure activities quality would meet my expectations	8%	8%	11%	7%	5%
	8%	6%	8%	10%	6%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

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

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are less likely than outdoor adventurers overall to be discouraged by cost (30% vs. 38%) and high transportation costs (29% vs. 35%).

Younger family visitors are less likely than their group overall to cite cost (24% vs. 29%).

Barrier	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Cost	38%	46%	29%	41%	29%	40%
	30% ▼	38%	24% ▼	35%	29%	29%
High transportation costs (gas, airfare)	35%	37%	27%	41%	24%	42%
	29% ▼	32%	24%	35%	23%	39%
Wildfires, flooding, or other environmental disruptions	32%	30%	30%	34%	27%	36%
	31%	28%	29%	35%	27%	37%
Unfavourable weather or season timing	32%	28%	31%	34%	28%	37%
	30%	25%	29%	31%	29%	39%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

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

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors cite each barrier on this slide at a similar rate to outdoor adventurers overall.

Older friend group visitors are more likely than their group overall to cite insects (44% vs. 31%).

Barrier	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Concerns about safety	30%	26%	29%	34%	28%	30%
	30%	29%	28%	39%	31%	22%
Poor value for money	27%	25%	24%	31%	19%	32%
	25%	26%	22%	27%	20%	31%
Poor road or water access	27%	29%	24%	28%	22%	31%
	26%	27%	23%	29%	22%	34%
Insects (e.g., blackflies, mosquitoes)	26%	25%	23%	30%	24%	31%
	27%	17%	20%	36%	25%	44% ▲

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

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

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are less likely to say Northern Ontario is too far to drive (19% vs. 25%).

Older family (16% vs. 27%) and younger family visitors (16% vs. 21%) are less likely than their group overall to cite distance.

Barrier	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Too far to drive	25%	34%	21%	27%	20%	24%
	19% ▼	29%	16% ▼	16% ▼	20%	19%
Lack of amenities or services at the destination	21%	21%	19%	23%	16%	19%
	21%	19%	18%	27%	21%	20%
Limited accommodation options	20%	21%	19%	24%	14%	17%
	17%	18%	17%	18%	16%	13%
Too remote or rugged for my comfort level	19%	25%	15%	23%	13%	20%
	17%	21%	13%	20%	13%	25%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

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

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors cite each barrier on this slide at a similar rate to outdoor adventurers overall.

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

Barrier	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Poor or unreliable cell phone or internet connectivity	19%	17%	21%	17%	18%	21%
	17%	11%	19%	16%	17%	22%
Unfamiliar or unclear regulations	17%	15%	18%	16%	20%	17%
	17%	13%	17%	14%	22%	18%
Availability of campsites	16%	11%	17%	17%	14%	17%
	17%	16%	18%	15%	18%	15%

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

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

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

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are less likely to say they do not know enough about Northern Ontario's outdoor adventure opportunities (3% vs. 12%).

Partner visitors are much less likely than their group overall to say so (3% vs. 15%).

Barrier	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Anti-American sentiment	14%	9%	12%	16%	14%	20%
	13%	6%	11%	14%	12%	23%
Difficulty finding reliable trip planning information	13%	13%	14%	14%	11%	12%
	12%	10%	13%	13%	13%	13%
I do not know enough about Northern Ontario's outdoor adventure activities opportunities	12%	15%	8%	17%	7%	11%
	3% ▼	3% ▼	4% ▼	4% ▼	3% ▼	0% ▼

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

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

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors cite each barrier on this slide at a similar rate to outdoor adventurers overall.

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

Barrier	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Concerns about crossing the Canada-US border	11%	11%	10%	11%	6%	15%
	8%	8%	9%	3%	4%	14%
Passport or documentation requirements	9%	8%	8%	9%	7%	13%
	6%	6%	6%	4%	2%	12%
Not sure the outdoor adventure activities quality would meet my expectations	8%	8%	8%	9%	9%	6%
	8%	7%	9%	9%	11%	6%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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); significance is not shown for these items.

PAST VISITORS: INDEPENDENT VS. GUIDED TRIPS – MARKET

All outdoor adventurers

Past visitors are more likely than outdoor adventurers overall to use a mix of guided and self-guided experiences (56% vs. 45%) and less likely to go fully self-guided (40% vs. 52%).

Ontario visitors are more likely than their market overall to mix guided and self-guided experiences (57% vs. 50%).

Approach	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
I mainly go on my own or with my own group – fully self-guided	52%	48%	65%	48%	45%
	40% ▼	40% ▼	50% ▼	37% ▼	34%
I use a mix of guided and self-guided	45%	50%	32%	48%	51%
	56% ▲	57% ▲	47% ▲	58% ▲	62%
I mainly use guided or outfitted experiences provided by operators	3%	2%	3%	3%	3%
	3%	2%	3%	4%	3%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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.

PAST VISITORS: INDEPENDENT VS. GUIDED TRIPS – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more likely than outdoor adventurers overall to use a mix of guided and self-guided experiences (56% vs. 45%).

Partner visitors are more likely than their group overall to mix guided and self-guided experiences (45% vs. 34%).

Approach	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
I mainly go on my own or with my own group – fully self-guided	52%	64%	41%	55%	39%	54%
	40% ▼	52% ▼	37% ▼	43% ▼	32% ▼	39% ▼
I use a mix of guided and self-guided	45%	34%	55%	42%	57%	43%
	56% ▲	45% ▲	59%	53% ▲	64%	60% ▲
I mainly use guided or outfitted experiences provided by operators	3%	2%	4%	3%	3%	3%
	3%	2%	4%	4%	4%	1%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (1 OF 4)

All outdoor adventurers

Past visitors are less likely than outdoor adventurers overall to rely on word of mouth (43% vs. 51%) and internet search (44% vs. 52%).

U.S. Drive visitors are less likely than their market overall to rely on word of mouth (36% vs. 47%).

Source	Overall (n=1,544 / 709)	Ontario (n=196 / 150)	Rest of Canada (n=389 / 148)	U.S. Drive (n=761 / 341)	U.S. Fly (n=198 / 69)
General internet search (e.g., Google, Bing)	52%	54%	56%	48%	56%
	44% ▼	49%	49%	41% ▼	42% ▼
Word of mouth (e.g., friends or family)	51%	59%	57%	47%	46%
	43% ▼	55%	47%	36% ▼	37%
Social media content (e.g., Instagram, Facebook, YouTube)	41%	38%	38%	42%	43%
	43%	36%	40%	46%	51%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	40%	40%	36%	43%	38%
	40%	35%	36%	45%	37%
Official tourism websites (e.g., national, provincial, state, regional, city)	39%	41%	45%	38%	28%
	37%	42%	45%	33%	27%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,544; past visitors n=709). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (2 OF 4)

All outdoor adventurers

Past visitors are more likely than outdoor adventurers overall to use AI tools (30% vs. 26%).

U.S. Drive visitors are more likely than their market overall to use AI tools (38% vs. 32%).

Source	Overall (n=1,544 / 709)	Ontario (n=196 / 150)	Rest of Canada (n=389 / 148)	U.S. Drive (n=761 / 341)	U.S. Fly (n=198 / 69)
Travel information centres or visitor centres	27%	26%	27%	28%	28%
	28%	27%	35%	27%	22%
Articles, blogs, or videos about travel destinations	27%	24%	24%	29%	29%
	26%	23%	18%	31%	27%
AI tools (e.g., ChatGPT, Gemini, Copilot)	26%	17%	17%	32%	29%
	30% ▲	16%	23%	38% ▲	37%
TV shows or documentaries	24%	15%	23%	25%	32%
	22%	16%	20%	26%	21%
Magazines, travel guides or brochures	24%	13%	20%	28%	22%
	21%	14%	21%	25%	19%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,544; past visitors n=709). 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.

PAST VISITORS: SOURCES OF INSPIRATION – MARKET (3 OF 4)

All outdoor adventurers

Past visitors are more likely than outdoor adventurers overall to use social media influencers (21% vs. 17%).

U.S. Drive visitors are more likely than their market overall to use influencers (26% vs. 20%).

Source	Overall (n=1,544 / 709)	Ontario (n=196 / 150)	Rest of Canada (n=389 / 148)	U.S. Drive (n=761 / 341)	U.S. Fly (n=198 / 69)
Outfitter or lodge websites	20%	20%	19%	21%	18%
	22%	22%	22%	22%	22%
Forums or online communities	19%	19%	18%	19%	21%
	18%	20%	16%	18%	24%
Social media influencers	17%	15%	11%	20%	20%
	21% ▲	17%	11%	26% ▲	26%
Outdoor or sporting magazines or publications	16%	10%	12%	18%	20%
	17%	10%	11%	21%	27%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	12%	10%	11%	14%	10%
	14%	10%	10%	17%	18%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,544; past visitors n=709). 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.

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

All outdoor adventurers

Past visitors are more likely than outdoor adventurers overall to use travel phone lines (12% vs. 7%).

U.S. Drive (16% vs. 10%) and Rest of Canada visitors (7% vs. 3%) are more likely than their market overall to use them.

Source	Overall (n=1,544 / 709)	Ontario (n=196 / 150)	Rest of Canada (n=389 / 148)	U.S. Drive (n=761 / 341)	U.S. Fly (n=198 / 69)
Travel agents	10%	12%	8%	11%	11%
	12%	14%	9%	13%	11%
Travel-related phone lines or hotlines	7%	4%	3%	10%	7%
	12% ▲	4%	7% ▲	16% ▲	16% ▲
Consumer shows/exhibitions	6%	8%	6%	6%	7%
	8%	10%	7%	7%	12%
Email newsletters	6%	5%	5%	7%	4%
	7%	5%	7%	9%	6%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,544; past visitors n=709). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (1 OF 4)

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are less likely than outdoor adventurers overall to rely on word of mouth (43% vs. 51%) and internet search (44% vs. 52%).

Younger family visitors are less likely than their group overall to rely on word of mouth (38% vs. 45%).

Source	Overall (n=1,544 / 709)	Partners (n=291 / 97)	Younger Families (n=355 / 230)	Older Families (n=402 / 151)	Younger Friends (n=185 / 101)	Older Friends (n=232 / 95)
General internet search (e.g., Google, Bing)	52%	58%	47%	55%	45%	51%
	44% ▼	51%	44%	47%	41%	44%
Word of mouth (e.g., friends or family)	51%	47%	45%	56%	49%	61%
	43% ▼	41%	38% ▼	47%	41% ▼	56%
Social media content (e.g., Instagram, Facebook, YouTube)	41%	33%	50%	40%	50%	32%
	43%	36%	51%	40%	49%	34%
Online travel booking or review sites (e.g., Expedia, TripAdvisor, Booking.com)	40%	39%	45%	43%	34%	36%
	40%	38%	45%	39%	32%	40%
Official tourism websites (e.g., national, provincial, state, regional, city)	39%	43%	34%	43%	33%	39%
	37%	37%	34%	40%	35%	43%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,544; past visitors n=709). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (2 OF 4)

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more likely than outdoor adventurers overall to use AI tools (30% vs. 26%).

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

Source	Overall (n=1,544 / 709)	Partners (n=291 / 97)	Younger Families (n=355 / 230)	Older Families (n=402 / 151)	Younger Friends (n=185 / 101)	Older Friends (n=232 / 95)
Travel information centres or visitor centres	27%	26%	24%	32%	22%	33%
	28%	26%	24%	36%	25%	37%
Articles, blogs, or videos about travel destinations	27%	23%	27%	29%	27%	32%
	26%	16%	28%	27%	28%	34%
AI tools (e.g., ChatGPT, Gemini, Copilot)	26%	18%	36%	25%	30%	20%
	30% ▲	20%	39%	33%	28%	23%
TV shows or documentaries	24%	19%	22%	25%	27%	31%
	22%	18%	23%	17%	23%	30%
Magazines, travel guides or brochures	24%	22%	16%	30%	20%	29%
	21%	22%	17%	25%	17%	30%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,544; past visitors n=709). 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.

PAST VISITORS: SOURCES OF INSPIRATION – TRAVELLER TYPE (3 OF 4)

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more likely than outdoor adventurers overall to use social media influencers (21% vs. 17%).

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

Source	Overall (n=1,544 / 709)	Partners (n=291 / 97)	Younger Families (n=355 / 230)	Older Families (n=402 / 151)	Younger Friends (n=185 / 101)	Older Friends (n=232 / 95)
Outfitter or lodge websites	20%	14%	19%	25%	16%	25%
	22%	20%	20%	26%	19%	27%
Forums or online communities	19%	16%	20%	19%	22%	20%
	18%	11%	21%	21%	21%	17%
Social media influencers	17%	11%	28%	13%	24%	11%
	21% ▲	15%	30%	14%	21%	18%
Outdoor or sporting magazines or publications	16%	11%	18%	19%	18%	14%
	17%	16%	17%	24%	18%	9%
Specialized apps (e.g., OnX, Navionics, AllTrails, iNaturalist)	12%	9%	16%	10%	17%	9%
	14%	5%	18%	11%	20%	12%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,544; past visitors n=709). 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.

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

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more likely than outdoor adventurers overall to use travel phone lines (12% vs. 7%).

Partner visitors are more likely than their group overall to use them (11% vs. 4%).

Source	Overall (n=1,544 / 709)	Partners (n=291 / 97)	Younger Families (n=355 / 230)	Older Families (n=402 / 151)	Younger Friends (n=185 / 101)	Older Friends (n=232 / 95)
Travel agents	10%	5%	11%	15%	10%	9%
	12%	6%	12%	17%	13%	10%
Travel-related phone lines or hotlines	7%	4%	13%	7%	8%	3%
	12% ▲	11% ▲	16% ▲	14% ▲	10%	4%
Consumer shows/exhibitions	6%	6%	7%	7%	7%	7%
	8%	10%	8%	9%	9%	6%
Email newsletters	6%	3%	7%	6%	5%	7%
	7%	5%	8%	8%	5%	9%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,544; past visitors n=709). 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.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – MARKET (1 OF 2)

Outdoor adventurers who use social media to plan

Past visitors who use social media are more likely than social media users overall to use Instagram (74% vs. 68%).

Within each market, differences between visitors and the market overall are not significant on these platforms.

Platform	Overall (n=709 / 357)	Ontario (n=89 / 66)	Rest of Canada (n=161 / 64)	U.S. Drive (n=363 / 188)	U.S. Fly (n=96 / 39)
YouTube	76%	78%	67%	79%	80%
	79%	79%	63%	83%	85%
Instagram	68%	71%	61%	69%	74%
	74% ▲	75%	69%	74%	83%
Facebook	66%	52%	67%	70%	58%
	67%	60%	69%	68%	68%
TikTok	43%	34%	33%	47%	52%
	48%	37%	41%	51%	64%
Reddit	33%	36%	30%	32%	44%
	34%	32%	31%	33%	47%

Social media users (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who use social media to plan (B4) (n=709; past visitors n=357). 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.

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

Outdoor adventurers who use social media to plan

Past visitors are also more likely to use X (35% vs. 26%) and WhatsApp (22% vs. 15%).

U.S. Drive visitors are more likely than their market overall to use X (44% vs. 34%) and WhatsApp (20% vs. 14%).

Platform	Overall (n=709 / 357)	Ontario (n=89 / 66)	Rest of Canada (n=161 / 64)	U.S. Drive (n=363 / 188)	U.S. Fly (n=96 / 39)
X (formerly known as Twitter)	26%	20%	15%	34%	23%
	35% ▲	22%	25%	44% ▲	27%
Pinterest	22%	22%	16%	22%	33%
	25%	26%	17%	25%	34%
WhatsApp	15%	22%	11%	14%	22%
	22% ▲	26%	17%	20% ▲	32%
Snapchat	14%	6%	7%	18%	22%
	18%	7%	12%	21%	33%
Threads	10%	11%	7%	10%	18%
	12%	11%	9%	11%	23%

Social media users (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who use social media to plan (B4) (n=709; past visitors n=357). 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.

PAST VISITORS: SOCIAL MEDIA PLATFORMS – TRAVELLER TYPE (1 OF 2)

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

Past visitors who use social media are more likely than social media users overall to use Instagram (74% vs. 68%).

Younger family visitors are more likely than their group overall to use TikTok (57% vs. 51%).

Platform	Overall (n=709 / 357)	Partners (n=106 / 40)	Younger Families (n=209 / 139)	Older Families (n=180 / 71)	Younger Friends (n=104 / 57)	Older Friends (n=81 / 37)
YouTube	76%	66%	79%	75%	76%	87%
	79%	68%	80%	86%	76%	91%
Instagram	68%	58%	73%	70%	77%	60%
	74% ▲	71%	76%	80%	74%	62%
Facebook	66%	56%	70%	73%	60%	56%
	67%	65%	72%	70%	52%	67%
TikTok	43%	34%	51%	42%	49%	29%
	48%	37%	57% ▲	42%	54%	31%
Reddit	33%	26%	40%	27%	41%	36%
	34%	26%	40%	25%	44%	33%

Social media users (overall) | Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who use social media to plan (B4) (n=709; past visitors n=357). 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.

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

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

Past visitors are also more likely to use X (35% vs. 26%) and WhatsApp (22% vs. 15%).

Younger family visitors are more likely than their group overall to use X (43% vs. 34%) and WhatsApp (25% vs. 19%).

Platform	Overall (n=709 / 357)	Partners (n=106 / 40)	Younger Families (n=209 / 139)	Older Families (n=180 / 71)	Younger Friends (n=104 / 57)	Older Friends (n=81 / 37)
X (formerly known as Twitter)	26%	25%	34%	19%	33%	19%
	35% ▲	29%	43% ▲	26%	40%	23%
Pinterest	22%	24%	27%	21%	15%	20%
	25%	30%	29%	28%	15%	12%
WhatsApp	15%	11%	19%	13%	16%	16%
	22% ▲	18%	25% ▲	23%	19%	22%
Snapchat	14%	9%	19%	11%	20%	9%
	18%	16%	23%	11%	17%	12%
Threads	10%	7%	12%	12%	10%	12%
	12%	15%	14%	12%	8%	9%

Social media users (overall) | Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who use social media to plan (B4) (n=709; past visitors n=357). 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.

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – MARKET

All outdoor adventurers

Past visitors are more likely than outdoor adventurers overall to use AI tools to plan their next trip (74% vs. 62%).

U.S. Drive (86% vs. 71%) and Rest of Canada visitors (57% vs. 46%) are more likely than their market overall to use AI tools.

Response	Overall (n=1,540 / 711)	Ontario (n=198 / 150)	Rest of Canada (n=395 / 151)	U.S. Drive (n=754 / 341)	U.S. Fly (n=194 / 69)
Likely to use AI tools (TOP2)	62%	52%	46%	71%	72%
	74% ▲	57%	57% ▲	86% ▲	86% ▲

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers, excluding “Don’t know” (n=1,540; past visitors n=711). 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?

PAST VISITORS: LIKELIHOOD OF USING AI TOOLS – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more likely than outdoor adventurers overall to use AI tools to plan (74% vs. 62%).

Visitors are more likely than their group overall to use AI tools among older families (72% vs. 60%) and younger families (82% vs. 76%).

Response	Overall (n=1,540 / 711)	Partners (n=290 / 101)	Younger Families (n=354 / 230)	Older Families (n=400 / 151)	Younger Friends (n=184 / 101)	Older Friends (n=232 / 95)
Likely to use AI tools (TOP2)	62%	50%	76%	60%	71%	55%
	74% ▲	58%	82% ▲	72% ▲	77%	70% ▲

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers, excluding “Don’t know” (n=1,540; past visitors n=711). 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?

PAST VISITORS: GETTING TO DESTINATIONS – MARKET

All outdoor adventurers

Past visitors are more likely than outdoor adventurers overall to travel with a trailer (35% vs. 27%) or fly to a regional hub and then drive (41% vs. 36%).

U.S. Drive visitors are more likely than their market overall to travel with a trailer (39% vs. 30%).

Mode of travel	Overall (n=1,558 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=400 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Personal vehicle (car, truck, SUV)	84%	87%	81%	84%	88%
	84%	88%	81%	83%	84%
Fly to a regional hub, then drive	36%	34%	27%	41%	32%
	41% ▲	37%	34%	47% ▲	39%
Personal vehicle with trailer (e.g., boat, camper, ATV)	27%	23%	23%	30%	29%
	35% ▲	30% ▲	25%	39% ▲	43% ▲
RV / motorhome	11%	8%	10%	13%	10%
	13%	9%	12%	15%	15%
Float plane or charter flight to a remote destination	9%	5%	7%	9%	13%
	12% ▲	6%	9%	14% ▲	23% ▲

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,558; past visitors n=712). T3 How do you typically get to your outdoor adventure activities destinations? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: GETTING TO DESTINATIONS – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more likely than outdoor adventurers overall to travel with a trailer (35% vs. 27%) or fly to a regional hub and then drive (41% vs. 36%).

Younger family visitors are more likely than their group overall to use a float plane or charter flight (20% vs. 15%).

Mode of travel	Overall (n=1,558 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Personal vehicle (car, truck, SUV)	84%	80%	85%	84%	85%	88%
	84%	77%	85%	87%	80% ▼	88%
Fly to a regional hub, then drive	36%	27%	44%	29%	44%	37%
	41% ▲	29%	49% ▲	33%	47%	44%
Personal vehicle with trailer (e.g., boat, camper, ATV)	27%	20%	38%	25%	28%	28%
	35% ▲	24%	43% ▲	30%	37% ▲	34%
RV / motorhome	11%	6%	14%	14%	9%	8%
	13%	8%	15%	16%	12%	11%
Float plane or charter flight to a remote destination	9%	7%	15%	7%	13%	2%
	12% ▲	8%	20% ▲	7%	17%	0%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,558; past visitors n=712). T3 How do you typically get to your outdoor adventure activities destinations? Please select all that apply.
"Not sure" (<1%) not shown.

PAST VISITORS: ROLE IN A FUTURE TRIP – MARKET

All outdoor adventurers

Past visitors are more likely than outdoor adventurers overall to say Northern Ontario would be the only destination of a trip (31% vs. 26%), and less likely to see it as a secondary stop (2% vs. 4%).

Rest of Canada visitors are more likely than their market overall to make it the primary destination (48% vs. 38%).

Role of Northern Ontario	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
It would be the only destination of the trip	26%	28%	19%	28%	32%
	31% ▲	29%	25%	33%	43%
It would be the primary destination, with brief stops elsewhere	47%	49%	38%	50%	46%
	50%	53%	48% ▲	50%	45%
It would be one of several equal destinations	18%	18%	23%	16%	17%
	15%	16%	17%	15%	11%
It would be a secondary stop on a trip focused elsewhere	4%	<1%	11%	2%	2%
	2% ▼	1%	8%	1%	1%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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.

PAST VISITORS: ROLE IN A FUTURE TRIP – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more likely than outdoor adventurers overall to say Northern Ontario would be the only destination of a trip (31% vs. 26%).

Younger family visitors are more likely than their group overall to say so (35% vs. 30%).

Role of Northern Ontario	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
It would be the only destination of the trip	26%	26%	30%	25%	25%	22%
	31% ▲	32%	35% ▲	30%	33% ▲	24%
It would be the primary destination, with brief stops elsewhere	47%	37%	50%	47%	49%	54%
	50%	39%	52%	54%	45%	57%
It would be one of several equal destinations	18%	22%	15%	19%	18%	17%
	15%	25%	13%	10% ▼	17%	17%
It would be a secondary stop on a trip focused elsewhere	4%	6%	2%	5%	6%	2%
	2% ▼	1%	1%	5%	4%	2%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). 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.

PAST VISITORS: PREFERRED LODGING – MARKET (1 OF 2)

All outdoor adventurers

Past visitors are less likely than outdoor adventurers overall to prefer drive-in lodges or resorts (38% vs. 45%) and commercial cottages or cabin rentals (39% vs. 46%).

U.S. Drive visitors are less likely than their market overall to prefer drive-in lodges (36% vs. 44%).

Lodging option	Overall (n=1,543 / 711)	Ontario (n=196 / 150)	Rest of Canada (n=394 / 151)	U.S. Drive (n=756 / 341)	U.S. Fly (n=197 / 69)
Hotel or motel	51%	47%	53%	51%	49%
	47%	42%	49%	49%	44%
Commercial cottage or cabin rental	46%	55%	48%	43%	47%
	39% ▼	48% ▼	36% ▼	37% ▼	41%
Designated campground (private or provincial park)	45%	41%	47%	47%	39%
	40% ▼	42%	41%	39% ▼	35%
Drive-in lodge or resort	45%	50%	44%	44%	43%
	38% ▼	47%	35%	36% ▼	34%
AirBnB	44%	47%	39%	45%	49%
	45%	50%	36%	44%	55%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,543; past visitors n=711). 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.

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

PAST VISITORS: PREFERRED LODGING – MARKET (2 OF 2)

All outdoor adventurers

Past visitors are slightly less likely than outdoor adventurers overall to prefer private cottages (36% vs. 40%).

Within each market, differences between visitors and the market overall are not significant on these options.

Lodging option	Overall (n=1,543 / 711)	Ontario (n=196 / 150)	Rest of Canada (n=394 / 151)	U.S. Drive (n=756 / 341)	U.S. Fly (n=197 / 69)
Private cottage (owned or borrowed)	40%	44%	43%	39%	37%
	36% ▼	43%	39%	34%	24%
Backcountry or wilderness camping	34%	26%	30%	36%	43%
	32%	27%	32%	34%	39%
Home of friends or relatives (unpaid)	15%	19%	19%	14%	11%
	18%	23%	23%	14%	15%
Fly-in or remote outpost camp	12%	11%	9%	13%	14%
	13%	9%	7%	16%	20%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,543; past visitors n=711). 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.

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

PAST VISITORS: PREFERRED LODGING – TRAVELLER TYPE (1 OF 2)

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are less likely than outdoor adventurers overall to prefer drive-in lodges or resorts (38% vs. 45%) and commercial cottages or cabin rentals (39% vs. 46%).

Younger family visitors are less likely than their group overall to prefer drive-in lodges (34% vs. 41%).

Lodging option	Overall (n=1,543 / 711)	Partners (n=290 / 100)	Younger Families (n=354 / 230)	Older Families (n=401 / 151)	Younger Friends (n=184 / 101)	Older Friends (n=235 / 95)
Hotel or motel	51%	51%	52%	54%	50%	44%
	47%	36% ▼	51%	49%	41% ▼	46%
Commercial cottage or cabin rental	46%	51%	41%	53%	36%	49%
	39% ▼	41%	36% ▼	45%	32%	53%
Designated campground (private or provincial park)	45%	41%	46%	43%	47%	52%
	40% ▼	33%	41%	42%	37% ▼	46%
Drive-in lodge or resort	45%	44%	41%	50%	40%	48%
	38% ▼	34%	34% ▼	46%	35%	48%
AirBnB	44%	40%	51%	48%	49%	33%
	45%	41%	51%	42%	52%	33%

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

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

Base: all outdoor adventurers (n=1,543; past visitors n=711). 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.

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

PAST VISITORS: PREFERRED LODGING – TRAVELLER TYPE (2 OF 2)

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are slightly less likely than outdoor adventurers overall to prefer private cottages (36% vs. 40%).

Younger family visitors are more likely than their group overall to prefer fly-in or remote outpost camps (19% vs. 16%).

Lodging option	Overall (n=1,543 / 711)	Partners (n=290 / 100)	Younger Families (n=354 / 230)	Older Families (n=401 / 151)	Younger Friends (n=184 / 101)	Older Friends (n=235 / 95)
Private cottage (owned or borrowed)	40%	39%	35%	46%	37%	46%
	36% ▼	32%	33%	40%	37%	46%
Backcountry or wilderness camping	34%	26%	39%	30%	40%	40%
	32%	22%	36%	31%	39%	34%
Home of friends or relatives (unpaid)	15%	11%	17%	17%	17%	15%
	18%	14%	17%	18%	19%	19%
Fly-in or remote outpost camp	12%	7%	16%	10%	14%	13%
	13%	6%	19% ▲	8%	13%	12%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,543; past visitors n=711). 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.

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

PAST VISITORS: PREFERRED ACCESS – MARKET

All outdoor adventurers

Past visitors are more open than outdoor adventurers overall to remote boat-in access (30% vs. 26%).

U.S. Drive visitors are more open than their market overall to fly-in (46% vs. 39%) and boat-in access (33% vs. 28%).

Access type	Overall (n=1,479 / 692)	Ontario (n=185 / 145)	Rest of Canada (n=372 / 145)	U.S. Drive (n=731 / 335)	U.S. Fly (n=191 / 67)
Road-accessible areas	87%	91%	91%	85%	85%
	86%	94%	88%	82%	84%
Fly-in or float plane access	33%	18%	24%	39%	44%
	37%	18%	28%	46% ▲	54%
Train-in access	29%	25%	20%	34%	34%
	29%	25%	23%	30%	38%
Remote boat-in access	26%	23%	20%	28%	30%
	30% ▲	26%	24%	33% ▲	34%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,479; past visitors n=692). 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.

PAST VISITORS: PREFERRED ACCESS – TRAVELLER TYPE

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more open than outdoor adventurers overall to remote boat-in access (30% vs. 26%).

Younger family visitors are more open than their group overall to boat-in (37% vs. 33%) and fly-in access (48% vs. 43%).

Access type	Overall (n=1,479 / 692)	Partners (n=268 / 90)	Younger Families (n=349 / 228)	Older Families (n=380 / 147)	Younger Friends (n=177 / 100)	Older Friends (n=227 / 93)
Road-accessible areas	87%	89%	84%	90%	88%	87%
	86%	84%	83%	91%	85%	91%
Fly-in or float plane access	33%	22%	43%	27%	41%	33%
	37%	23%	48% ▲	27%	42%	32%
Train-in access	29%	28%	32%	25%	34%	32%
	29%	23%	33%	25%	32%	28%
Remote boat-in access	26%	19%	33%	25%	29%	22%
	30% ▲	27%	37% ▲	29%	30%	19%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,479; past visitors n=692). 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.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (1 OF 4)

All outdoor adventurers

Past visitors are less likely than outdoor adventurers overall to say scenic driving (44% vs. 53%) and Northern Lights viewing (50% vs. 57%) would enhance their trip.

U.S. Drive visitors are less likely than their market overall to choose scenic driving (38% vs. 51%).

Experience	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Northern Lights or dark sky viewing experiences	57%	64%	54%	59%	51%
	50% ▼	59%	47%	49% ▼	40%
Scenic driving or road trip components	53%	53%	58%	51%	52%
	44% ▼	51%	56%	38% ▼	38% ▼
Visting local markets, retail and artisans	49%	49%	50%	47%	54%
	42% ▼	46%	42%	39% ▼	47%
Wildlife viewing separate from hunting or fishing	44%	43%	42%	46%	43%
	40% ▼	42%	39%	38% ▼	43%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). M2 Beyond outdoor adventure activities itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (2 OF 4)

All outdoor adventurers

Past visitors' interest in the experiences on this slide is similar to that of outdoor adventurers overall.

U.S. Fly visitors are less likely than their market overall to choose culinary experiences (34% vs. 48%).

Experience	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Culinary experiences featuring locally sourced or freshly caught / harvested food	43%	42%	44%	42%	48%
	41%	42%	44%	40%	34% ▼
Visiting local breweries or distilleries	32%	24%	35%	33%	32%
	29%	22%	32%	32%	27%
All-inclusive lodge packages with guided outdoor adventure activities	32%	29%	28%	35%	32%
	29%	27%	25%	33%	29%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	31%	30%	30%	31%	35%
	33%	32%	29%	36%	29%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). M2 Beyond outdoor adventure activities itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (3 OF 4)

All outdoor adventurers

Past visitors' interest in the experiences on this slide is similar to that of outdoor adventurers overall.

Within each market, differences between visitors and the market overall are not significant on these experiences.

Experience	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Photography or nature interpretation guided experiences	31%	31%	24%	33%	32%
	32%	30%	30%	35%	32%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	26%	23%	20%	31%	25%
	29%	23%	26%	35%	27%
Multi-stop regional itineraries combining several Northern Ontario areas	26%	28%	26%	26%	27%
	27%	27%	24%	28%	27%
Indigenous-led cultural or land-based experiences	25%	20%	19%	28%	29%
	25%	21%	18%	29%	28%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). M2 Beyond outdoor adventure activities itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – MARKET (4 OF 4)

All outdoor adventurers

Past visitors are more likely than outdoor adventurers overall to be interested in organized outdoor competitions or races (20% vs. 15%).

U.S. Drive visitors are more likely than their market overall to choose organized competitions (25% vs. 18%).

Experience	Overall (n=1,559 / 712)	Ontario (n=198 / 150)	Rest of Canada (n=401 / 151)	U.S. Drive (n=762 / 342)	U.S. Fly (n=198 / 69)
Learning and interpretation opportunities	23%	22%	23%	23%	23%
	25%	24%	21%	26%	27%
Youth or family-oriented introduction-to-outdoor adventure activities programs	16%	17%	13%	18%	17%
	18%	19%	15%	19%	18%
Organized outdoor competitions or races (e.g., cycling race, fat bike event, paddling race)	15%	11%	9%	18%	17%
	20% ▲	14%	13%	25% ▲	26%
None – I prefer to focus entirely on the activity	1%	1%	3%	1%	2%
	2%	1%	3%	1%	5%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). M2 Beyond outdoor adventure activities itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (1 OF 4)

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are less likely than outdoor adventurers overall to say scenic driving (44% vs. 53%) and Northern Lights viewing (50% vs. 57%) would enhance their trip.

Younger family visitors are less likely than their group overall to choose Northern Lights viewing (47% vs. 54%).

Experience	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Northern Lights or dark sky viewing experiences	57%	55%	54%	65%	44%	62%
	50% ▼	49%	47% ▼	60%	37%	61%
Scenic driving or road trip components	53%	56%	45%	60%	43%	57%
	44% ▼	55%	38% ▼	49% ▼	37%	51%
Visting local markets, retail and artisans	49%	48%	40%	55%	45%	54%
	42% ▼	42%	36%	47%	42%	48%
Wildlife viewing separate from hunting or fishing	44%	41%	43%	49%	40%	46%
	40% ▼	36%	38% ▼	48%	37%	42%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). M2 Beyond outdoor adventure activities itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (2 OF 4)

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors' interest in the experiences on this slide is similar to that of outdoor adventurers overall.

Younger family visitors are less likely than their group overall to choose all-inclusive lodge packages (31% vs. 36%).

Experience	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Culinary experiences featuring locally sourced or freshly caught / harvested food	43%	40%	44%	44%	40%	45%
	41%	31%	42%	44%	39%	43%
Visiting local breweries or distilleries	32%	29%	27%	30%	34%	43%
	29%	25%	28%	27%	29%	43%
All-inclusive lodge packages with guided outdoor adventure activities	32%	29%	36%	36%	28%	28%
	29%	23%	31% ▼	32%	28%	29%
Wellness experiences (spa, yoga, sauna, cold plunge, forest therapy)	31%	26%	41%	30%	28%	28%
	33%	27%	43%	26%	32%	27%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). M2 Beyond outdoor adventure activities itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (3 OF 4)

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors' interest in the experiences on this slide is similar to that of outdoor adventurers overall.

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

Experience	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Photography or nature interpretation guided experiences	31%	23%	34%	36%	32%	25%
	32%	20%	33%	43%	31%	34%
Multi-activity packages (e.g., fishing + paddling, hunting + wildlife photography)	26%	19%	36%	26%	29%	23%
	29%	19%	35%	31%	29%	28%
Multi-stop regional itineraries combining several Northern Ontario areas	26%	28%	26%	25%	22%	30%
	27%	25%	29%	25%	20%	35%
Indigenous-led cultural or land-based experiences	25%	19%	27%	28%	21%	27%
	25%	23%	27%	26%	17%	33%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). M2 Beyond outdoor adventure activities itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: ENHANCING EXPERIENCES – TRAVELLER TYPE (4 OF 4)

All outdoor adventurers | Traveller types are defined on slide 10

Past visitors are more likely than outdoor adventurers overall to be interested in organized outdoor competitions or races (20% vs. 15%).

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

Experience	Overall (n=1,559 / 712)	Partners (n=295 / 101)	Younger Families (n=356 / 230)	Older Families (n=404 / 151)	Younger Friends (n=186 / 101)	Older Friends (n=237 / 95)
Learning and interpretation opportunities	23%	20%	24%	24%	20%	24%
	25%	23%	26%	26%	22%	25%
Youth or family-oriented introduction-to-outdoor adventure activities programs	16%	2%	32%	22%	14%	6%
	18%	5%	28%	22%	15%	8%
Organized outdoor competitions or races (e.g., cycling race, fat bike event, paddling race)	15%	7%	23%	13%	19%	15%
	20% ▲	14%	26%	13%	24%	22%
None – I prefer to focus entirely on the activity	1%	2%	1%	1%	2%	2%
	2%	4%	1%	0%	3%	0%

All outdoor adventurers (overall) Have visited Northern Ontario (past 5 years)

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

Base: all outdoor adventurers (n=1,559; past visitors n=712). M2 Beyond outdoor adventure activities itself, which of the following additional experiences would enhance your trip? Please select all that apply.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (1 OF 4)

Outdoor adventurers who provided a response

Past visitors describe Northern Ontario's greatest advantage much as outdoor adventurers overall do, led by its vast, untouched wilderness.

Within each market, differences between visitors and the market overall are not significant on these themes.

Advantage	Overall (n=1,303 / 604)	Ontario (n=164 / 122)	Rest of Canada (n=329 / 129)	U.S. Drive (n=640 / 294)	U.S. Fly (n=170 / 59)
Vast, Untouched Wilderness & Nature	42%	46%	36%	46%	36%
	42%	45%	30%	48%	31%
Abundance of Lakes, Rivers & Water Access	26%	36%	24%	24%	28%
	27%	33%	21%	25%	38%
Beautiful Scenery & Landscapes	24%	28%	21%	26%	20%
	25%	29%	17%	28%	22%
Less Crowded / Solitude	20%	14%	19%	21%	24%
	19%	18%	12%	22%	24%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who provided a response (n=1,303; past visitors n=604). 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.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (2 OF 4)

Outdoor adventurers who provided a response

Past visitors mention each advantage on this slide at a similar rate to outdoor adventurers overall.

Within each market, differences between visitors and the market overall are not significant on these themes.

Advantage	Overall (n=1,303 / 604)	Ontario (n=164 / 122)	Rest of Canada (n=329 / 129)	U.S. Drive (n=640 / 294)	U.S. Fly (n=170 / 59)
Great Fishing Opportunities	15%	16%	12%	16%	12%
	14%	15%	9%	15%	12%
Authenticity & Unique Experience	12%	13%	10%	12%	15%
	10%	15%	6%	9%	15%
Unfamiliar / Open to Discovering	9%	7%	13%	8%	11%
	10%	5%	17%	10%	8%
Proximity / Accessibility from Home	9%	13%	12%	6%	9%
	10%	15%	14%	6%	10%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who provided a response (n=1,303; past visitors n=604). 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.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (3 OF 4)

Outdoor adventurers who provided a response

Past visitors mention each advantage on this slide at a similar rate to outdoor adventurers overall.

Within each market, differences between visitors and the market overall are not significant on these themes.

Advantage	Overall (n=1,303 / 604)	Ontario (n=164 / 122)	Rest of Canada (n=329 / 129)	U.S. Drive (n=640 / 294)	U.S. Fly (n=170 / 59)
Great Hunting Opportunities	6%	9%	4%	7%	2%
	5%	8%	5%	4%	5%
Wide Range of Outdoor Activities	6%	6%	6%	5%	6%
	5%	7%	5%	3%	8%
Friendly Locals & Hospitality	4%	1%	5%	4%	2%
	3%	0%	7%	3%	3%
Northern Lights	4%	5%	2%	5%	2%
	5%	5%	4%	5%	5%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who provided a response (n=1,303; past visitors n=604). 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.

PAST VISITORS: GREATEST ADVANTAGE – MARKET (4 OF 4)

Outdoor adventurers who provided a response

Past visitors mention each advantage on this slide at a similar rate to outdoor adventurers overall.

Within each market, differences between visitors and the market overall are not significant on these themes.

Advantage	Overall (n=1,303 / 604)	Ontario (n=164 / 122)	Rest of Canada (n=329 / 129)	U.S. Drive (n=640 / 294)	U.S. Fly (n=170 / 59)
Affordable / Good Value	2%	3%	4%	2%	0%
	2%	3%	2%	2%	0%
Cultural & Indigenous Heritage	2%	2%	2%	2%	4%
	3%	3%	1%	3%	3%
Wildlife Viewing & Biodiversity	2%	3%	1%	1%	3%
	1%	3%	1%	1%	1%
Dark Skies & Stargazing	1%	2%	<1%	<1%	<1%
	1%	2%	0%	1%	1%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who provided a response (n=1,303; past visitors n=604). 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.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (1 OF 4)

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

Past visitors describe Northern Ontario's greatest advantage much as outdoor adventurers overall do, led by its vast, untouched wilderness.

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

Advantage	Overall (n=1,303 / 604)	Partners (n=231 / 75)	Younger Families (n=295 / 196)	Older Families (n=350 / 133)	Younger Friends (n=164 / 89)	Older Friends (n=192 / 81)
Vast, Untouched Wilderness & Nature	42%	38%	41%	44%	49%	38%
	42%	38%	40%	43%	48%	39%
Abundance of Lakes, Rivers & Water Access	26%	26%	22%	29%	27%	28%
	27%	28%	25%	29%	26%	32%
Beautiful Scenery & Landscapes	24%	19%	24%	25%	27%	25%
	25%	24%	25%	24%	30%	21%
Less Crowded / Solitude	20%	19%	22%	19%	19%	22%
	19%	17%	21%	18%	17%	23%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who provided a response (n=1,303; past visitors n=604). 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.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (2 OF 4)

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

Past visitors mention each advantage on this slide at a similar rate to outdoor adventurers overall.

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

Advantage	Overall (n=1,303 / 604)	Partners (n=231 / 75)	Younger Families (n=295 / 196)	Older Families (n=350 / 133)	Younger Friends (n=164 / 89)	Older Friends (n=192 / 81)
Great Fishing Opportunities	15%	11%	15%	17%	20%	15%
	14%	11%	15%	16%	16%	8%
Authenticity & Unique Experience	12%	11%	14%	10%	16%	9%
	10%	3%	13%	9%	14%	7%
Unfamiliar / Open to Discovering	9%	11%	10%	11%	8%	4%
	10%	13%	11%	9%	9%	7%
Proximity / Accessibility from Home	9%	9%	7%	10%	8%	9%
	10%	8%	9%	7%	10%	18%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who provided a response (n=1,303; past visitors n=604). 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.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (3 OF 4)

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

Past visitors mention each advantage on this slide at a similar rate to outdoor adventurers overall.

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

Advantage	Overall (n=1,303 / 604)	Partners (n=231 / 75)	Younger Families (n=295 / 196)	Older Families (n=350 / 133)	Younger Friends (n=164 / 89)	Older Friends (n=192 / 81)
Great Hunting Opportunities	6%	5%	2%	7%	6%	10%
	5%	3%	3%	6%	8%	7%
Wide Range of Outdoor Activities	6%	4%	6%	6%	7%	7%
	5%	2%	6%	4%	6%	8%
Friendly Locals & Hospitality	4%	5%	4%	4%	3%	4%
	3%	9%	3%	3%	4%	0%
Northern Lights	4%	3%	4%	4%	3%	4%
	5%	4%	5%	5%	3%	7%

Provided a response (overall) | Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who provided a response (n=1,303; past visitors n=604). 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.

PAST VISITORS: GREATEST ADVANTAGE – TRAVELLER TYPE (4 OF 4)

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

Past visitors mention each advantage on this slide at a similar rate to outdoor adventurers overall.

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

Advantage	Overall (n=1,303 / 604)	Partners (n=231 / 75)	Younger Families (n=295 / 196)	Older Families (n=350 / 133)	Younger Friends (n=164 / 89)	Older Friends (n=192 / 81)
Affordable / Good Value	2%	4%	2%	2%	<1%	4%
	2%	3%	3%	1%	1%	4%
Cultural & Indigenous Heritage	2%	3%	3%	1%	3%	1%
	3%	3%	3%	1%	4%	1%
Wildlife Viewing & Biodiversity	2%	1%	1%	2%	2%	2%
	1%	2%	1%	1%	2%	1%
Dark Skies & Stargazing	1%	<1%	<1%	0%	2%	2%
	1%	0%	<1%	0%	2%	2%

Provided a response (overall) Have visited Northern Ontario (past 5 years)

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

Base: outdoor adventurers who provided a response (n=1,303; past visitors n=604). 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.